

HOW TO INTEGRATE YOUR BAO APPOINTMENT SETTING PROGRAM INTO SALESFORCE.COM

BAO offers the option to upload secured appointments as leads into your organization's Salesforce.com (SFDC) instance. This enables you to automate the capture of appointment details to avoid manual data entry.

BAO uses the system's "Web-to-Lead" functionality, but instead of creating an actual lead form, BAO's ERP system generates a lead package in real time as appointments are approved.

We can also provide attribution by using SFDC campaigns; we just need the SFDC campaign field included in the "Web-to-Lead" HTML file.

A NOTE ON "WEB-TO-LEAD"

"Web-to-Lead" is a one-way process that does not provide BAO with any hooks into your organization's SFDC instance, nor does it require a login. This means that we cannot update leads once they are posted in SFDC, and any edits to the data in SFDC are not sent back to BAO. Therefore, your sales reps/team will need to manage post-approval appointment changes via the MyPipeline email notice that BAO provides with each appointment.

These instructions are intended for your SFDC administrator, sales operations team, or the person who manages your organization's CRM system.

STEP 1 CREATE THE RECOMMENDED CUSTOM FIELDS

BAO recommends adding the following three fields to your SFDC lead object to help manage the data exchange between the two systems. If you already have similar fields in your system, you could use those.

MEETING ITINERARY

LARGE TEXT FIELD

Captures the conversation between BAO's ISR and your prospect. This mirrors the message delivered through email via the **MyPipeline@baoinc.com** address.

SALESREP - FULL NAME

TEXT FIELD

The full name of your sales rep for whom the appointment was booked. This field also gives you the ability to use your organization's lead routing rules so leads can automatically be passed to the appropriate lead owner.

MEETINGID

TEXT OR NUMERIC FIELD

This is the BAO transaction number that we use to reference specific appointments/leads (via our financial system) and it enables you to update leads with our ROI Tracker information.

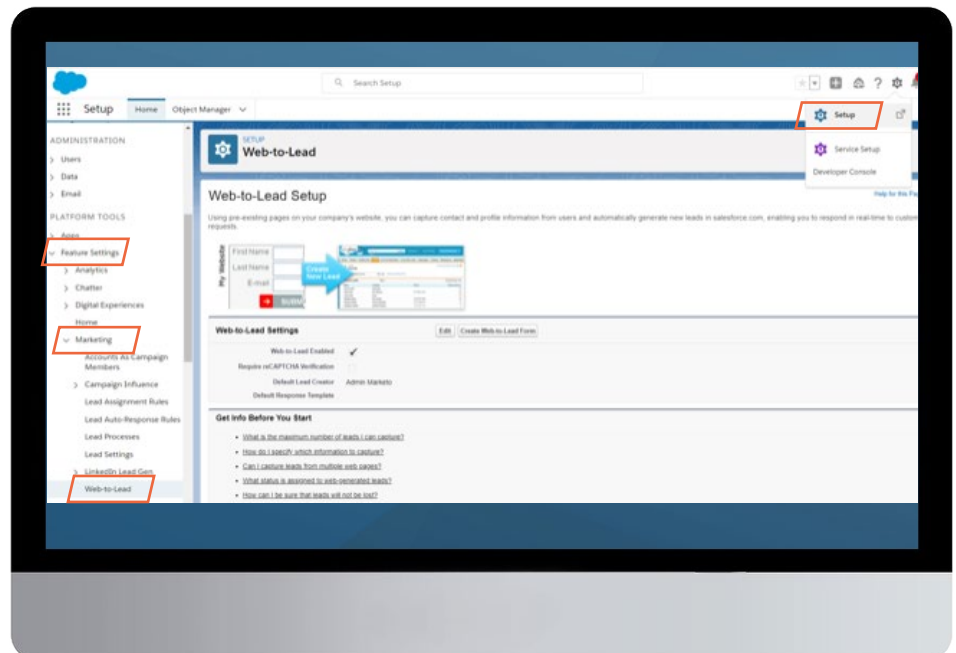
STEP 2 GENERATE THE “WEB-TO-LEAD” HTML FILE

1. Under the gear icon in the top right corner of your screen click **Setup**.
2. Under **Feature Settings** on the left, select **Marketing** then **Web-to-Lead**.
3. Then click the **Create Web-to-Lead Form** button.
4. Select the relevant fields.
For most BAO clients, this includes:

First Name, Last Name, Email, Title, Company, Phone, Street, City, State, Zip, and Lead Source.

Be sure to also select the three custom fields mentioned on the previous page. If there is additional data that is necessary for processing a lead in your CRM, be sure to include that as well.

5. The **Return URL** field is optional and not required for BAO integration.
6. Then click the **Generate** button.
7. Copy the HTML and paste it in either the body of an email or a Word/text document to include as separate attachment.



CREATE A WEB-TO-LEAD FORM

SELECT THE FIELDS TO INCLUDE ON YOUR WEB-TO-LEAD FORM

AVAILABLE FIELDS		SELECTED FIELDS
Salutation	Add > Remove <	First Name
Title		Last Name
Website		Email
Phone		Title
Mobile		Company
Fax		Phone
Address		Street
Zip		City
Country		State
State/Province		Zip
Etc.		Lead Source

Return URL **http://**

Generate Cancel

STEP 3 GET THE SFDC CAMPAIGN ID (OPTIONAL)

If you are using an SFDC campaign for attribution, we need the campaign ID. First, you need to create the campaign that you would like to use. Once created, navigate to that campaign in SFDC. In the URL, you'll see a string of 15 numbers and letters that begin with 701—this is the campaign ID.

  clientname.my.salesforce.com/**7013t000001vDLM**

You can send us either the campaign ID or the full URL for the campaign record.

STEP 4 SEND THE “WEB-TO-LEAD” HTML FILE TO BAO

Email the “Web-to-Lead” file, along with the SFDC campaign ID if using, to **lbearse@baoinc.com** either as an attachment or within the body of an email.

STEP 5 CONFIRM THE INTEGRATION

Once we receive the “Web-to-Lead” HTML file, BAO will create the integration. When setup is complete, we will contact you to confirm acceptance, which is simply a control post of one appointment so you can validate that the data is being passed correctly.

If there are any appointments not in your system, we'll coordinate the effort to match and send missing appointments.