Configuring Lead Export

While there are three types of leads in ADP CRM (iLeads, show and phone leads), to the system itself – ADP CRM identifies all leads from the original lead source. If a lead comes in via an ADF template, it is identified as an Internet lead. For example, the Phone Generator sends a lead to ADP CRM as an ADF XML file, and then identifies the Original Lead Source as Inbound Internet with a “Provider” or “Lead Source” as Phone Lead.

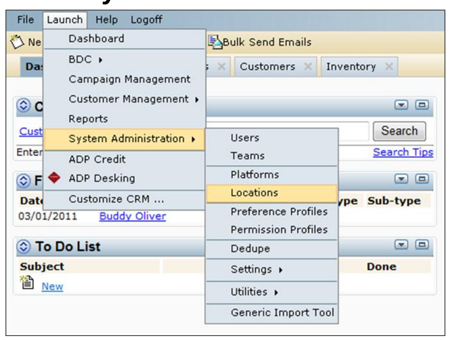
Configuring ADP CRM

Prior to using Lead Export, you must configure both ADP CRM and ADP Call Intelligence Enterprise Administration.

Configuring ADP CRM for Phone Leads

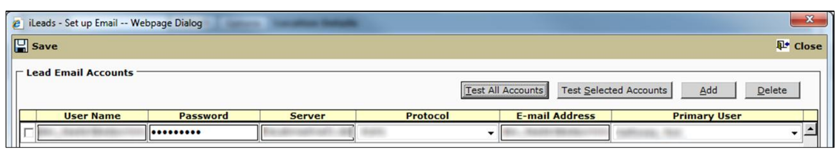
To configure ADP CRM for leads:

1. Log in to ADP CRM with system admin rights.
2. Click **Launch**. The Launch dropdown displays.
3. Select **System Administration > Locations**.



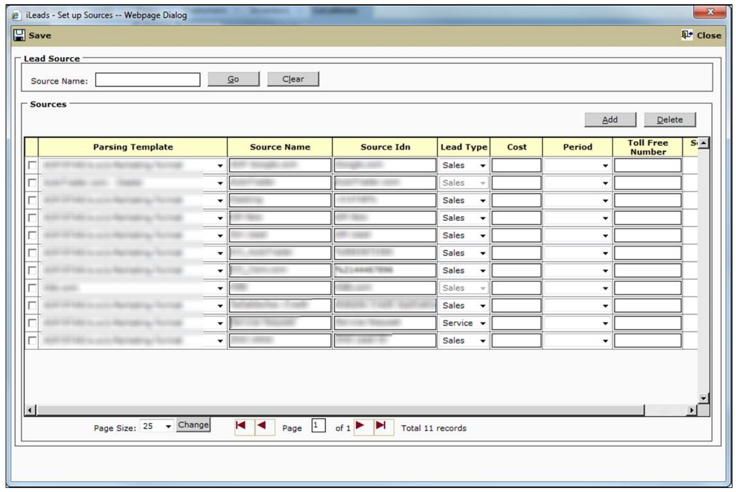
The Locations tab opens.

4. Click **iLead Settings** and select **iLead Email Accounts**. A separate iLeads – Set up Email dialog opens.

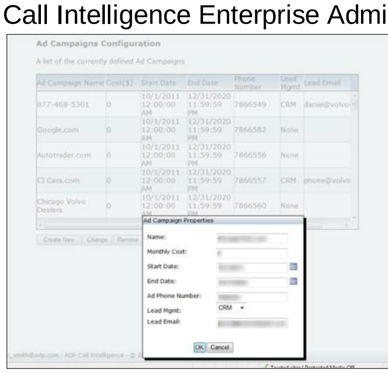
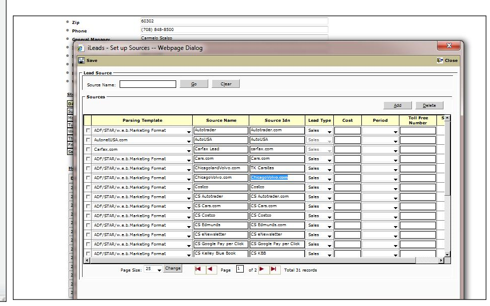


5. Enter or (where applicable) select the following information:
   - **User Name:** Enter the user name associated with the email account for the lead email account.
   - **Password:** Enter the password associated with the lead email account.
   - **Server:** Enter the server’s IP address associated with the lead email account.
   - **Protocol:** Select the Internet standard protocol for retrieving email from the server. Typically, POP3 is used.
   - **Email Address:** Enter the dealership’s email account that will serve as the lead email account routing point. This is the email address that will receive the leads generated from the lead sources.
     Note: Work with the dealership’s IT administrator if you do not have it.
   - **Primary User:** Select the primary user who is associated and will access the leads at this email address.
6. Repeat Step 5 if you have to add more lead email accounts.
7. Click **Save** in the upper-left area of the iLeads – Set up Sources dialog box.
8. Click **Close** in the upper-right area of the iLeads – Set up Sources dialog box.

9. Click **iLead Settings** and select **iLead Sources**. A separate iLeads – Set up Sources dialog opens.



10. Click **Add** and enter or (where applicable) select the following information for ***each*** lead source:
    - **Parsing Template:** Select the parsing template. ADF (Application Definition File) is the standard format used for templates. Select ADF/STAR/w.e.b. Marketing Format.
    - **Source Name:** Enter the Ad Campaign source name; this is where the lead is generated from (for example, KBB or VW New).
    - **Source Idn:** Enter the source name's domain (IDN = internationalized domain name). For example, if KBB (Kelly Blue Book) is the source name, KBB.com is the source Idn. A Source Idn isn't always a website; for example VW New may correspond to the VW New Source Name. Other times, the Idn might consist of the Ad Campaign information from the information pulled from Web Services for the Ad Campaign Lead generation.
    Warning! The Source Idn (right image) **MUST** match Ad Campaign Name in Call Intelligence Enterprise Administration (left image).

    - **Lead Type: ALWAYS** select *Sales*.

    Leave the following fields blank:
    - **Cost**
    - **Period**
    - **Toll Free Number**
    - **Send Res. Flg**
11. Repeat Step 10 if you have to add more lead sources.
12. Click **Save** in the upper-left area of the iLeads – Set up Sources dialog box.
13. Click **Close** in the upper-right area of the iLeads – Set up Sources dialog box.

Creating and Editing Ad Campaigns in Call Intelligence

Aside from configuring lead email accounts and sources, you must configure the ad campaign in Call Intelligence Enterprise Administration. Typically, this is done *prior* to configuring ADP CRM. This guide assumes the ad campaign is already set up in Call Intelligence Enterprise Administration; however, there are times where you may need to set up, verify, or edit an existing ad campaign.

Creating Ad Campaigns in Call Intelligence

To create an ad campaign for leads:

1. Navigate to MyNetworkPhone: http://www.mynetworkphone.com
2. Click **Call Intelligence**.
3. Enter your administrator user name and password and then click **Client Login**.
4. Click **Settings** and then click **Ad Campaigns Configuration**.
5. Click **Create New**. The Ad Campaign Properties dialog box opens.
6. Enter the following information:
    - **Name**: Enter the Ad Campaign Name. This is the name that displays on the iLeads Details tab page in ADP CRM.
    - **Monthly Cost**: Enter the monthly cost of the campaign.
    - **Start Date**: Click the calendar to select the month, day, and year the ad campaign begins.
    - **End Date**: Click the calendar to select the month, day, and year the ad campaign ends.
    - **Ad Phone Number**: Enter the phone number associated with the ad campaign. This phone number also displays on the iLeads Details tab page in ADP CRM.
    - **Lead Mgmt**: Select **CRM** to send phone leads to the **Lead Email** address. Select **(NONE)** to prevent phone leads from being emailed.
    - **Lead Email**: Enter the lead email address that serves as the routing/receiving point for the leads generated from this ad campaign. This email address must also match the lead email address entered in the ADP CRM iLead Email Accounts dialog box.
7. Click **OK**.

To edit an ad campaign for leads:

1. Navigate to MyNetworkPhone: http://www.mynetworkphone.com
2. Click **Call Intelligence**.
3. Enter your administrator user name and password and then click **Client Login**.
4. Click **Settings** and then click **Ad Campaigns Configuration**.
5. Click the row that contains the ad campaign you want to edit. The row becomes highlighted in blue.
6. Click **Change**.
7. Make the necessary edits.
8. Click **OK**.

Verifying iLead Details

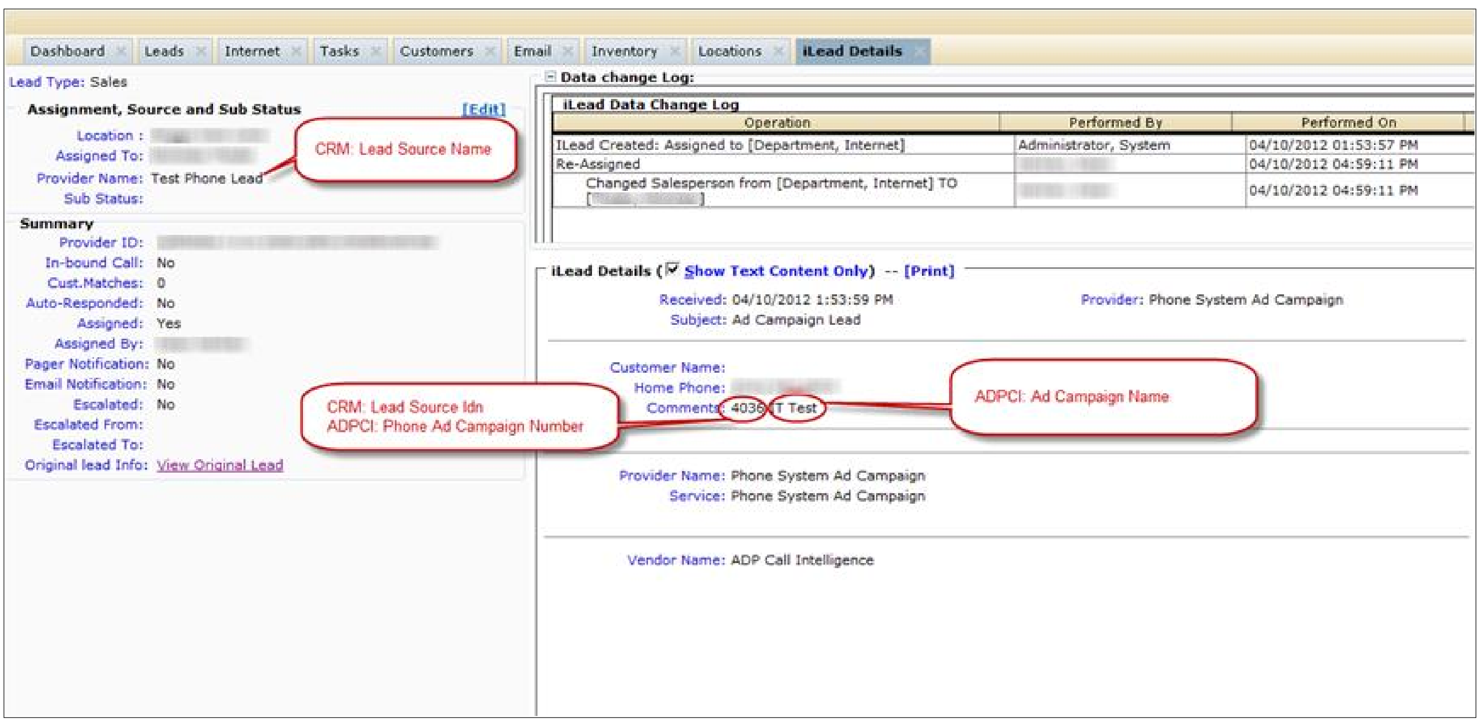
Prior to testing lead export, you can perform a visual check of an iLead in ADP CRM to verify the required information matches the required fields in both ADP CRM and ADP Call Intelligence Enterprise Administration.

Verifying iLead Details

To verify an iLead's details match required fields you must configure in ADP CRM and ADP Call Intelligence Ad Campaigns Configuration:

1. Make some calls to the ad campaign phone number. Wait about 10 minutes for the lead to propagate to the CRM iLeads application.
2. Log in to CRM.
3. In the Leads area on the Dashboard, click a Customer Name link. A tab opens with the lead's customer name.

4. Verify the following fields match the required fields in both ADP CRM and ADP Call Intelligence Ad Campaigns Configuration:



5. Close the lead by clicking the "X" on the customer name's lead page tab.

Testing Lead Export

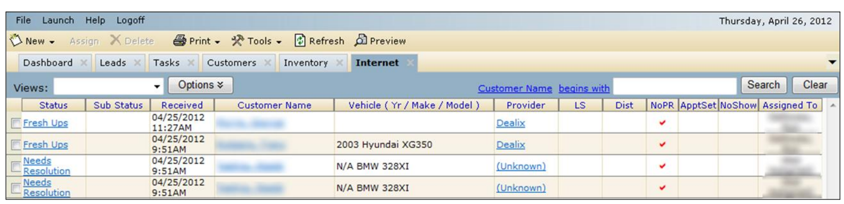
The last step in the process is to actually test the lead export functionality.

Testing Lead Export Functionality

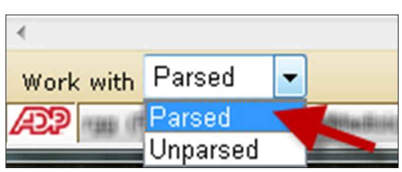
To test lead export functionality:

1. Navigate to MyNetworkPhone: http://www.mynetworkphone.com
2. Click **Call Intelligence**.
3. Enter your administrator user name and password and then click **Client Login**.
4. Click **Settings** and then click **Ad Campaigns Configuration**.
5. Click the row that contains the ad campaign you want to edit. The row becomes highlighted in blue.
6. Click **Change**.
7. Change the ad campaign's timeframe to reflect a 1-day ad campaign:
   - **Start Date**: Click the calendar to select today's month and day.
   - **End Date**: Click the calendar to select tomorrow's month and day.
8. From the Lead Mgmt dropdown, enable **Lead Email** by selecting **CRM**.
9. Click **OK**.
10. Call the ad campaign's phone number a couple of times to generate emails containing leads.
    Important! Make calls from different numbers to generate unique leads. For example, call from your cell phone, desk phone, etc.
11. Go back to the ad campaign you just changed and do the following:
    a) If you want to disable **Lead Email**, from the Lead Mgmt dropdown, select **(NONE)**.
    b) Change the ad campaign Start and End Date fields to the correct start and end dates.
12. Click **OK**.
13. Log in to ADP CRM and wait approximately ten minutes for leads to display in the system.
14. On the Dashboard, navigate to the iLeads by Source widget and click the **Total** link (for iLeads).

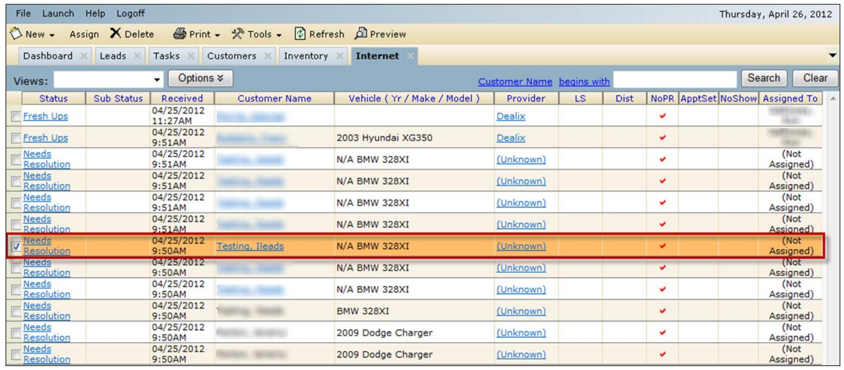
The Internet tab opens.



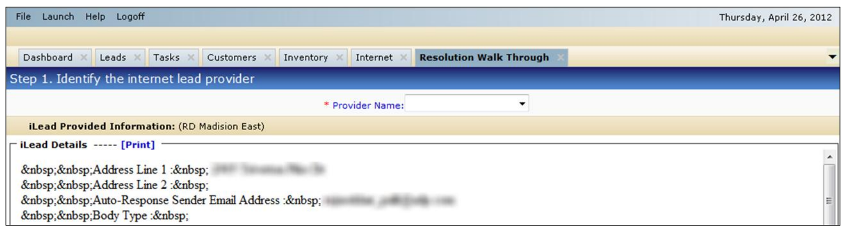
15. Go to the bottom of the page and verify Parsed is selected. If not, select Parsed.



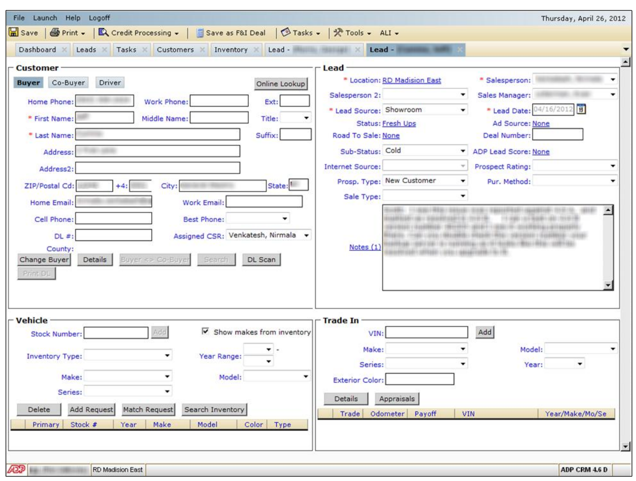
16. In the Status column, select a lead with a Needs Resolution status and click **Needs Resolution**.



The Resolution Walk Through tab opens. This features the lead as unparsed code. You can step through the process, beginning with selecting the Provider Name from the Provider Name dropdown menu underneath the Provider Walk Through tab.



17. Click the Leads tab.
18. Click a lead with a Fresh Ups status. The customer's lead page opens.



19. In the Lead area, select the Lead Source and click **Save** in the upper-left corner of the ADP CRM.