



Product FAQ

Doc Version 9.28.2007

The purpose of this document is to provide Validar Lead Import users with helpful information to get the most or of their application.

FAQs

1. What do the Dashboard status messages mean?

- *Available* - Leads that have been uploaded to Validar, but have not been imported into Salesforce
- *Processed* – Number of total leads which have gone through the import process
- *Omitted* – Number of Leads which were removed due to the cleansing process
- *Matched* – Total Leads and contacts matched at import
- *Create* – Total New Leads created at import
- *Errors* - Errors which may have occurred do to incomplete information at import

2. How does Validar Match Leads?

To determine a match, we start off by trying to find potential matches for email or last name. If we get a match on one of those two, then we will compare the match based upon the following fields Email, Last Name, First Name, Company, Phone, City, State, Postal Code, with Email being the highest value and Postal Code being the lowest value. The more weighted fields that match, the higher the likelihood of an exact match. If we don't make an exact match, but we have enough information to a possible match, we will create leads and provide links to all the possible matches.

3. The right side of my page is cut off. I'm missing navigation buttons and screen text. How do I resolve this?

If your screen is smaller than 1064x768 then change your custom tab configuration to remove the salesforce.com sidebar.

4. How do Validar fields types compare to Salesforce field types?

<u>Validar</u>	<u>Salesforce</u>
Pick Many	Multi-Select
Pick One	Picklist
Text	Text

Tips and Tricks

Reporting and Tracking Tips

1. Track by Campaign

- a. Create a Campaign specific to your lead source. Make sure the campaign is active.
- b. Begin Import
- c. Annotation – On the Annotation Page, Select the desired campaign.
- d. View Campaign reports

2. Track by Lead

- a. Create a custom field called “Validar Lead Source” in the Salesforce Lead Object.
- b. Begin Import.
- c. On the Mapping Page, set a ‘Constant’ value for that field. Eg. (Set a lead source constant = July 2007 National Event)
- d. Generate Lead Reports with the new Lead Source File

3. Track Qualification of Leads

- a. Create a Custom Field call Lead Rank. Populate Lead rank with the same Values provided to Validar. (e.g. A, B, C). Lead Ranking has to be set up in advance with Validar Lead Capture to work properly.
- b. Begin Import
- c. On Mapping - select the field Lead Rank and the Associate Lead rank Field from Validar
- d. Lead Reports can now contain Lead Ranking.