Lattice

Configuring Predictive Lead Scoring with Salesforce

This document provides a walkthrough of the required steps for configuring Lattice Engines Predictive Lead Scoring with Salesforce as the CRM source system and Lead Score destination. No MAP system is configured.

ABOUT API ACCESS

Lattice connects to Salesforce using two-factor authentication. It performs a one-time pull of historical information to determine which Leads converted into actual sales and uses this data to build an analytic model. Subsequent API requests are performed on a regular basis to update Lattice data and match it against recent developments.

CONFIGURATION SUMMARY

Below is an overview of the configuration process:

1. Create or modify an API User Profile with the **API Enabled** and **Password Never** Expires permissions enabled.

2. Verify that the profile has **Read** and **View All** access to the `Account`, `Opportunity`, and `Contact` objects, and **Read**, **Edit**, and **View All** access to the `Lead` object.

3. Create two custom fields on the `Lead` object for the Lattice Lead Score and Lattice Last Scored Date.

4. Associate the API User Profile with a new user named `Lattice_API`.

5. Configure Predictive Lead Scoring to use Salesforce as the CRM source system with the `Lattice_API` user credentials.

To configure Salesforce for Predictive Lead Scoring, create a Lattice API user and create custom fields to store the Lattice Lead Score and the date a lead was last scored.

To create custom Lattice fields and an API user:

1. Create a custom Lattice Lead Score field on the `Lead` object with the following settings:

Property	Value
Field Label	Lattice Lead Score
Field Name	Lattice_Lead_Score
API Name	Lattice_Lead_Score__c
Data Type	Number
Length	3
Decimal Places	0

2. Create a custom Lattice Last Score Date field on the `Lead` object with the following settings:

Property	Value
Field Label	Lattice Last Score Date
Field Name	Last_Score_Date
API Name	Last_Score_Date__c
Data Type	Date/Time

3. Create a User Profile or Permission Set in Salesforce named `Lattice_API`, with the following access:
   - **Read** and **View All** access to the `Account`, `Opportunity`, and `Contact` objects.
   - **Read**, **Edit**, and **View All** access to the `Lead` object.
   - **Read** permissions for all fields on the above objects.
   - **Write** permission for the Lattice Lead Score and Last Score Date fields.

   NOTE: If your Salesforce deployment includes proprietary or confidential data on these objects, you may wish to restrict access to only those fields that are predictive. Consult with your Lattice Engagement Manager to determine which set of fields to include.

4. Grant the User Profile or Permission Set the **API Enabled** and **Password Never Expires** permissions under **System Permissions**.
5. Create a Lattice API User that uses the User Profile or Permission Set defined above.
   - Set the Email and Username for the API user to `<your_organization_name>.pls@lattice-engines.com`
   - Check the **Generate new password and notify user immediately** checkbox to notify the Lattice team that the deployment has API access to Salesforce.

After creating the custom fields and API user in Salesforce, configure the connection to PLS through the Web application.

**To set Salesforce as the CRM system and Lead Score destination:**

1. Log in to the Predictive Lead Scoring Web site.
2. Click **Configure System**.
   The **Configure CRM and Marketing Automation** screen displays.

Configure CRM and Marketing Automation	Define Lead Flow

3. In the **Configure CRM Connection** pane, select **Salesforce**.
4. Populate the **Username** and **Password** fields with the Lattice API user credentials for Salesforce.
   If required for your network configuration, enter the **Security Token**:

   Configure CRM Connection

   Select a CRM and enter your login credentials. This information will be used to retrieve relevant data, score leads and write back the Lattice Score.

   CRM Connection Credentials *

   ◉ Salesforce

   Username *
   `<lattice_api_user>@domain.com`

   Password *
   `••••••••`

   Security Token
   `<alphanumeric SFDC security token>`

   Connect

   Configure Marketing Automation Connection

   Select a Marketing Automation system and enter your login credentials. This information will be used to retrieve relevant data, score leads and write back the Lattice Score.

   ✓ None

5. Click **Connect**.
   A message displays if authentication is successful.
6. In the **Configure Marketing Automation Connection** pane, select **None**.
   A success message displays.
7. Click **Define Lead Flow** at the top of the screen:

Configure CRM and Marketing Automation	Define Lead Flow
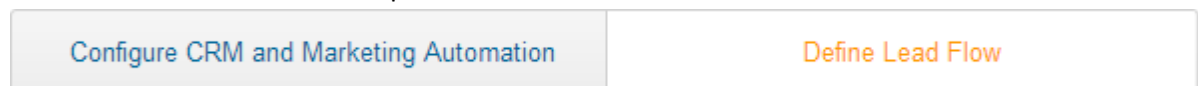
8. In the Lead Source pane, select **Salesforce**.
9. In the Lead Score Publishing pane, select **Salesforce**.
10. In the **Lead** text field , specify the `Lattice_Lead_Score` field:

    ◉ Salesforce   Lead `Lattice_Lead_Score`

11. Click **Done**.
    The Web application returns to the **Status** screen to indicate that configuration is complete.
    After this point, configuration is read-only. Contact Lattice Customer Support if modifications are required.

SALESFORCE OBJECT AND FIELD REFERENCE

Lattice accesses the `Account`, `Lead`, `Opportunity`, and `Contact` objects in Salesforce. Below are examples of fields that Lattice uses to model data.

ACCOUNT

AnnualRevenue	BillingPostalCode	Industry
BillingCity	BillingState	NumberOfEmployees
BillingCountry	Id	Website

LEAD

AnnualRevenue	ConvertedOpportunityId	LastActivityDate
City	Country	LeadSource
Company	EmailBouncedDate	NumberOfEmployees
ConvertedAccountId	Id	OwnerId
ConvertedContactId	Industry	State
ConvertedDate	IsConverted	Status

OPPORTUNITY

AccountId	IsClosed
CloseDate	IsWon
Id	CreatedDate

CONTACT

AccountId
Id