Commercial Marketplace Lead Management

Stay on top of your best leads by connecting your Microsoft AppSource or Azure Marketplace listing to your CRM.

Lead management at a glance

- **Ensure** you don’t miss out on business opportunities.
- **Understand** who reached you and reach out to them.
- **Integrate** your CRM to manage your leads in one central location.

Best practices for lead management

Process
Define a clear sales process, with milestones, KPIs, and clear team ownership

Qualification
Define prerequisites which indicate whether a lead has been fully qualified. Ensure sales or marketing representatives qualify leads carefully before taking them through the full sales process

Follow ups
Don’t forget to follow up – expect the typical transaction to require 5 to 12 follow up calls

Nurture
Nurture your leads; this could get you on the way to a higher profit margin

Things to know while you integrate your CRM

- **CRM compatibility.** The following systems are supported: Microsoft Dynamics 365, Marketo, Salesforce as well as Azure Table and HTTPS endpoint.
- **Read the documentation.** To see how to set up a lead destination, read the documentation here, or check out the FAQ here.
- **Configure a lead destination.** When you create a new offer in Partner Center you can go to “Offer setup”, “Customer leads” section and click “Connect” to set up.
- **Validate lead configuration**: In the “Connection details” you can click “Validate” to send a test lead to the lead destination configured. See an example here.
- **Need support?** Contact Support here. Select Category = “Commercial Marketplace", select Topic = Lead management configuration.
- **Can’t find the lead in your CRM?** The end user's email domain may originate from .edu. Microsoft won't pass PII data from .edu domains.
- **Can’t find the lead in Salesforce?** Read this article. Check if the web to lead form is a mandatory field based on a picklist. If so, change it to a non-mandatory text field.

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Setting up leads in Azure Table

1. If you don't have an Azure account, you can create a free trial account (for 12 months)
2. After your Azure account is active, sign in to the Azure portal
3. In the Azure portal, create a storage account
4. Copy the storage account connection string for the key and paste it into the **Storage Account Connection String** field on the Cloud Partner Portal

Setting up leads in Marketo

1. Sign in to Marketo
2. Select **Design Studio**
3. Select **New Form**
4. Fill the required fields in the New Form and then select **Create**
5. On Field Details, select **Finish**
6. Approve and Close
7. On the Marketplace LeadBacked tab, select **Embed Code**
8. Copy the values shown in Embed Code so you can configure the ids in the Cloud Partner Portal

Setting up leads in Microsoft Dynamics 365

1. Make sure you fulfill the prerequisites
2. Install and set up the Marketplace Lead Writer
3. Configure user permissions
4. Set up security settings
5. Complete configuring Dynamics CRM

Setting up leads in Salesforce

1. Sign in to Salesforce
2. Select '**Setup**'
3. Expand the '**Build**' menu to '**Customize/ Leads/Web-to-Lead**'
4. On '**Web-to-Lead Setup**', select '**Create Web-to-Lead Form**'
5. On '**Create a Web-to-Lead Form**', select '**Generate**'
6. Copy the OID in the sample and save it. You'll paste the OID in the '**Object Identifier**' field on the Cloud Partner Portal

Setting up leads using an HTTPS endpoint

1. Open the Flow webpage and Select **Sign in** or select **Sign up free** to create a free Flow account
2. Sign in and select **My flows** on the menu bar
3. Select **Create from blank**
4. Select the **Request/Response** connector and then search for the request trigger
5. Select the **Request** trigger
6. Copy the **JSON Example** provided here into the **Request Body JSON Schema**
7. Add a new step and choose the CRM system of your choice with the action to create a new record
8. Provide the connection inputs for your connector and select the **Leads** entity
9. Flows shows a form for providing lead information - you can map items from the input request by choosing to add dynamic content
10. Map the fields you want and then select **Save** to save your flow
11. An HTTP POST URL is created in the Request - copy this URL and use it as the HTTPS endpoint