Overview

Merlin Intel Integration with Zapier

Integrating Merlin Intel with Zapier will enable you to supercharge your sales pipeline by integrating your anonymous visitor identification and available contacts with over 1,000 applications. From creating new leads in your CRM to updating your MailChimp mailing list, you will now have the ability to easily integrate our data with all of these applications. Before you get started, you will need to create a Zapier account. You can do this by visiting http://www.zapier.com. This guide will cover some basic integration concepts, enabling integration within both Merlin Intel and Zapier, a walk-thru of a sample automation workflow (Zap) and will cover some frequently asked questions.

Zapier keeps automation simple by creating 2 dedicated ways of handling data. All applications that integrate with Zapier follow this context in order keep the concept of automation simple. Below is an overview of each:

- **Triggers**
o This is some event in your system that causes (triggers) the system to send data. For Merlin Intel, this means we have identified an anonymous visitor. o Based on the cause (trigger) the data is sent to Zapier for processing

- **Action**
o What you wish to do with this data when Zapier receives it. This could be adding the visitor information to a Google Sheet, updating a mailing list in MailChimp or any other countless possibilities.

Now that you understand Triggers and Actions, Zapier brings these features together in a workflow (also known as a ZAP)

- Each ZAP has 1 trigger (a cause) and 1 or more actions
- You can easily create new ZAPs without the complexity of involving IT staff to perform integration work

  We recommend you spend a few minutes reviewing the "Getting Started with Zapier" guide for a better understanding.

  - https://zapier.com/learn/getting-started-guide/ *Merlin Intel has 3 available "triggers" for Zapier.*

- **New Visitor Notification With Company Data Only**
o This option will trigger when we identify a company visiting your website that matches the following criteria

  - ▪ Visitor is listed as a company
  - ▪ The identified company has no available possible contacts

▪ This individual has not been tagged from email campaign or form integration

- **New Visitor Notification With Company and Contact Data**
  o This option will trigger when we identify accompany visiting your website that matches the following criteria
    - Visitor is listed as a company
    - The identified company has available possible contacts
    - This individual has not been tagged from email campaign or form integration

- **New Visitor Notification for a Tagged Visitor**
  o This option will trigger when we identify accompany visiting your website that matches the following criteria
    - Visitor is listed as a company
    - This individual has been tagged from email campaign or form integration

    So why do we have 3 triggers for essentially the same thing?

o First let's look at this integration from the Merlin Intel side.
o Zapier integration is enabled on a per user basis
o Zapier data is sent at the same time an email notification is sent
o All Lead Handling rules of the user apply to sending data to Zapier

- Number of page views
- Number of days to prevent duplicates
- URL watch list
- Territory rules
- Watch and Exclude Lists
- Company Filters

o By providing the granulatiry of the 3 triggers, you have the ability to handle each type of identification in a different manner. For instance, say you only want to create a lead in your CRM for each tagged visitor that clicks on an email campaign link but you want to handle an identified company with available contacts in a different manner? We give you the ability to segment and handle each type of visitor differently.

Enable Zapier Integration from within Merlin Intel

Zapier Integration is enabled on a per user basis. This allows every user to create a connection and develop as many zaps (automations) as they like with the data produced from Merlin Intel. Since this feature is enabled on a per user basis, every time an email notification is sent to the user, we will also send the same data to Zapier for processing. To enable Zapier integration for a user, follow the steps below:

- Login to Merlin Intel
- Go to "Configuration -> Users"
- Select the User you wish to enable
- Click on the "Other Integration" tab
- Check "Enable Zapier Integration"
- Select and Copy your "Zapier API Key"

  o You will need this to configure Zapier

- Click "Update User"

Creating your first Zap

Now we are ready to create our first automation. The easiest way to learn is to dive in a setup a Zap for yourself, we are going to show you an example of integrating Merlin Intel with Zoho CRM. This example will take our trigger "New Visitor Notification With Company and Contact Data" and will execute the Zoho CRM action of "Create/Update Lead" for each available contact we have provided.

Merlin Intel Identified Company with Available Contacts to Zoho CRM Create/Update Lead

o Login to your Zapier Dashboard
o Click"MakeZap"
o Type"VV with contacts to ZohoLead"in"Name your Zap..."textbox
o Under "Choose a Trigger App", Type "Merlin Intel"
o Select"Merlin Intel"
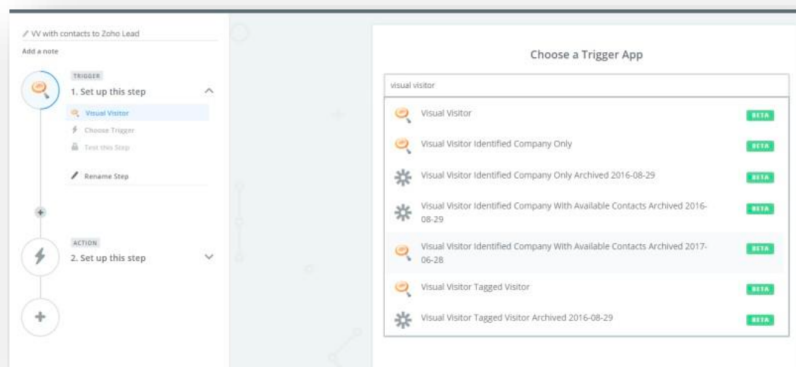
o Select "New Notification With Company and ContactData"
o Click"Save+Continue"
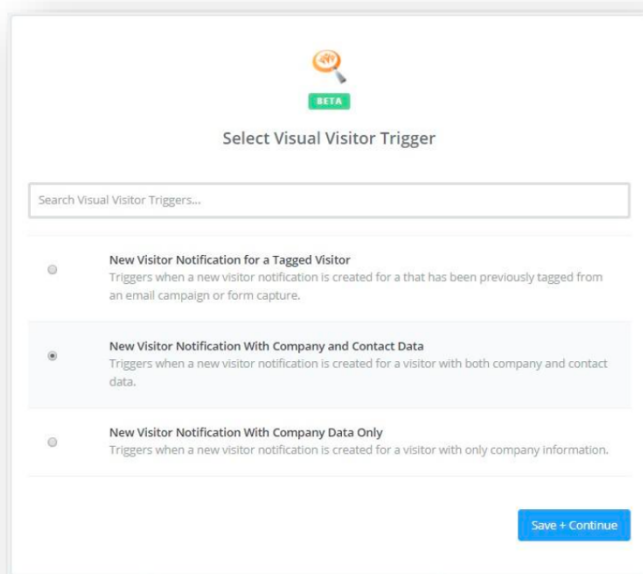
o Click"Connect a New Account"
o Enter your "API Key" we generated from Merlin Intel (you copied this earlier in this document)
o Enter the"EmailAddress"of the user associated witht he"APIKey"from Merlin Intel
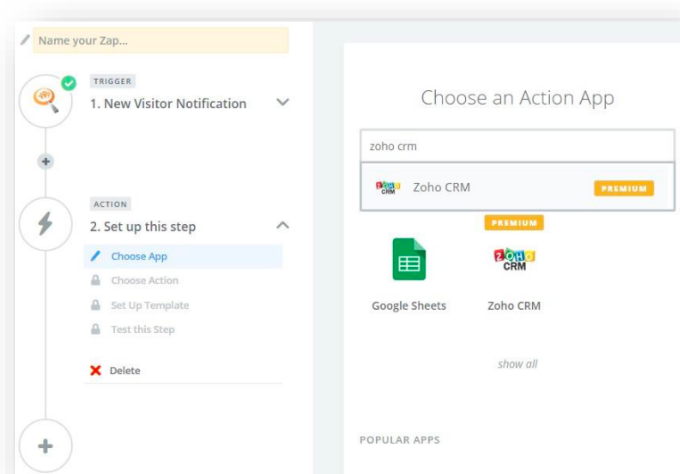o Click "Yes,continue"
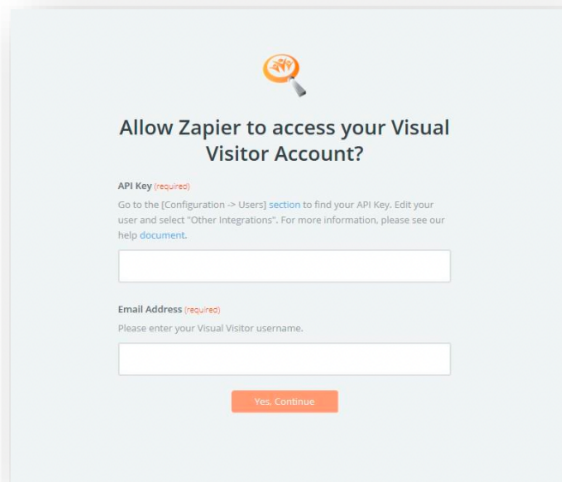
o Click "Test"to test your credentials
o Click "Save+Continue"
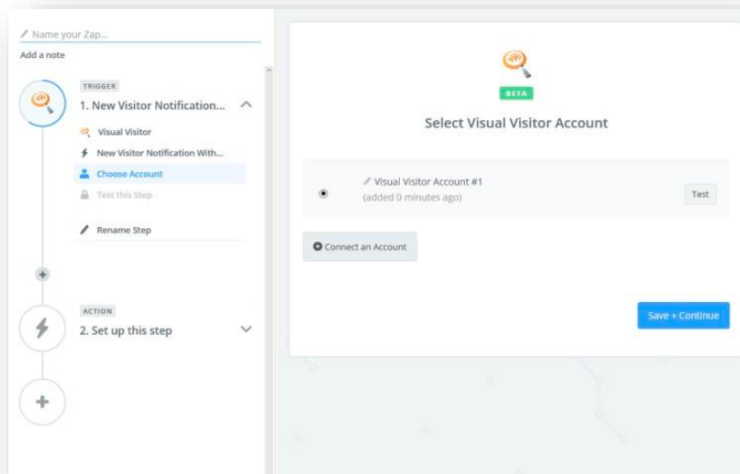
o Click "Fetch & Continue" (this will fetch some sample data for you to work with for mapping)
o Click the "view your visitor" to evaluate the sample data and see what is contained in each field
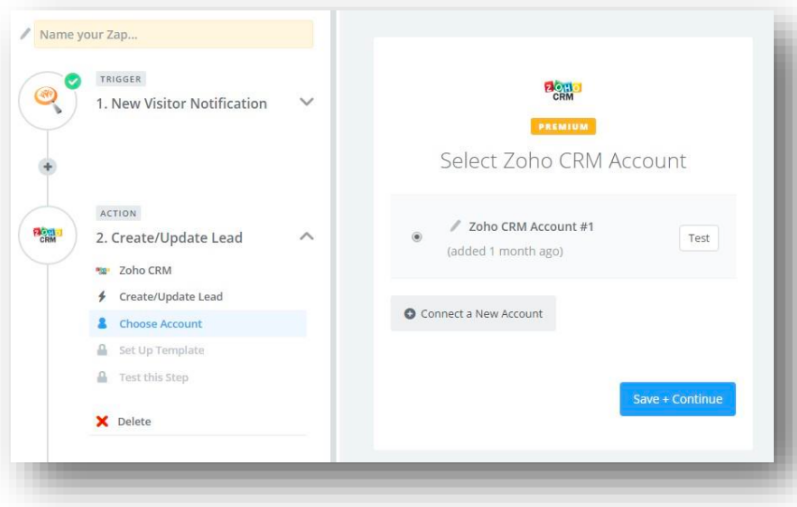o Click "Continue"
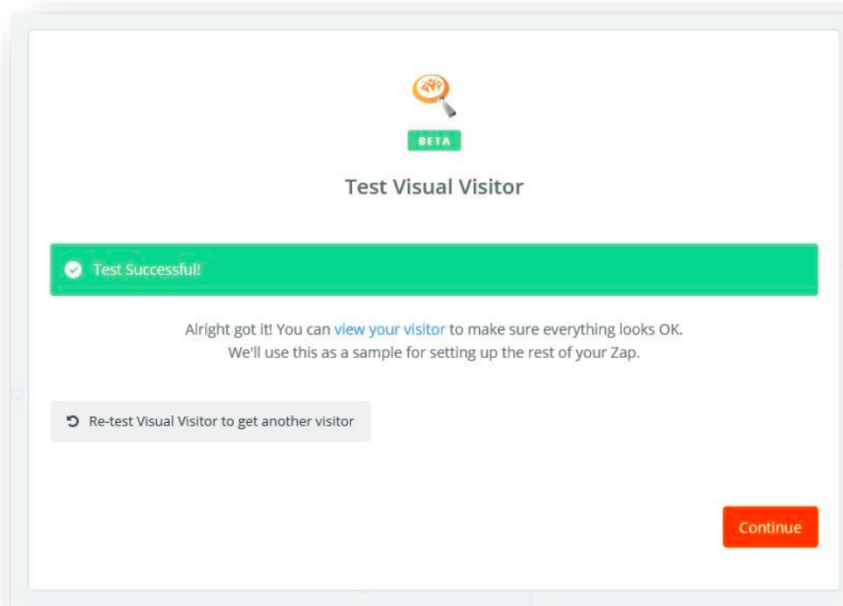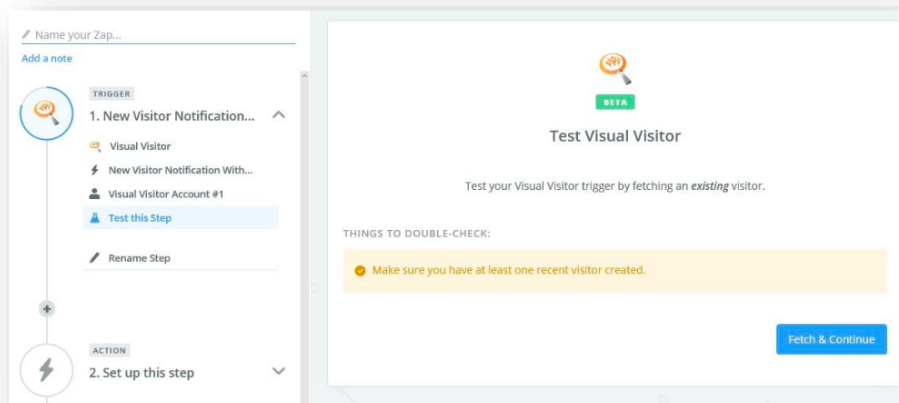
- o Under "Choose a Action App",Type "Zoho CRM"

- o Select "Zoho CRM"

- Under "Select Zoho CRM Action" select "Create/Update Lead"
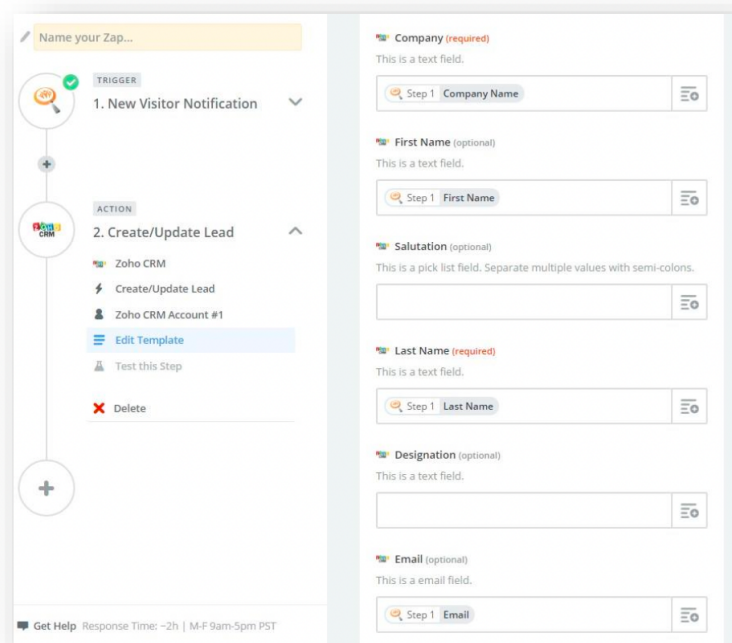- Click "Save + Continue"
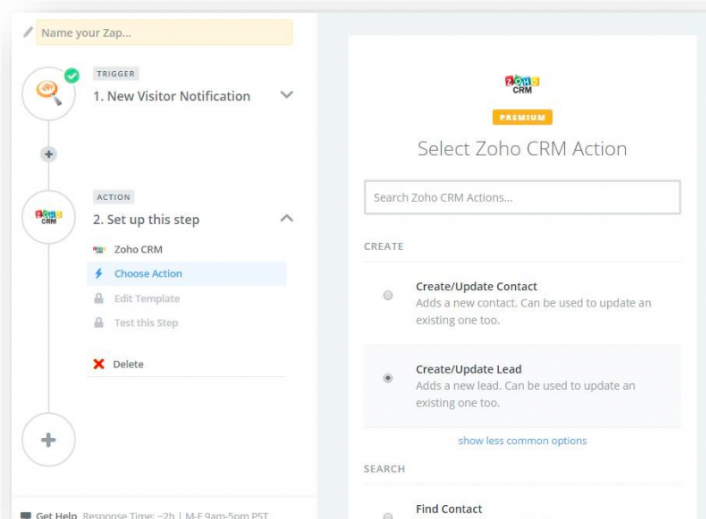
- Click "Connect a New Account"
- Click the link embedded In the modal window to generate an"authtoken"
- Cut and paste"AuthToken"into"Allow Zapier accesst to your Zoho CRM account"window
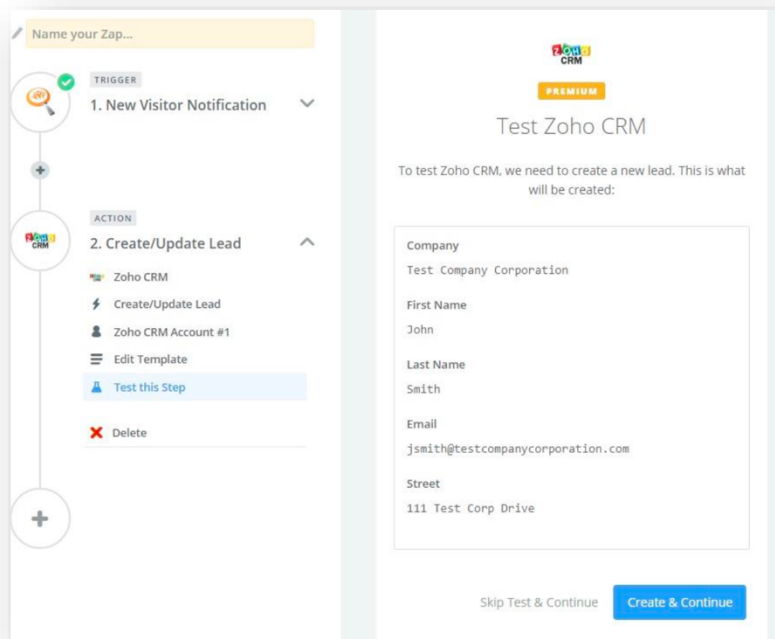- Click "Yes, Continue"
- Click "Save + Continue"

Map the following fields
- o Company->CompanyName
- o First Name -> First Name
- o Last Name -> Last Name
- o Email->Email
- o Website->Domain Name
- o Street->Address1
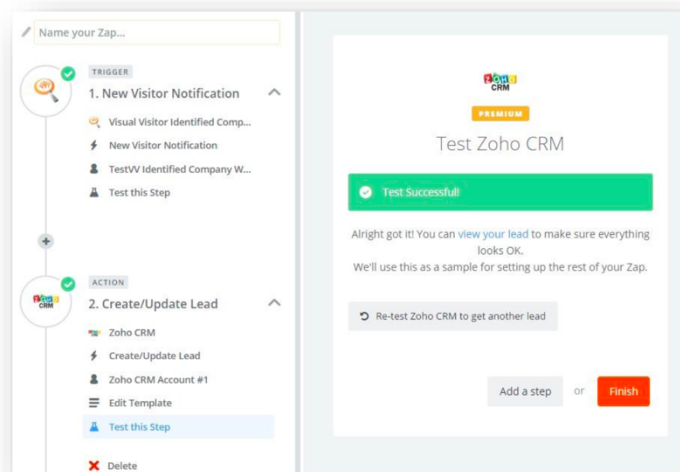- o City->City
- o State->State
- o Zip->Zip

- o Click "Continue"

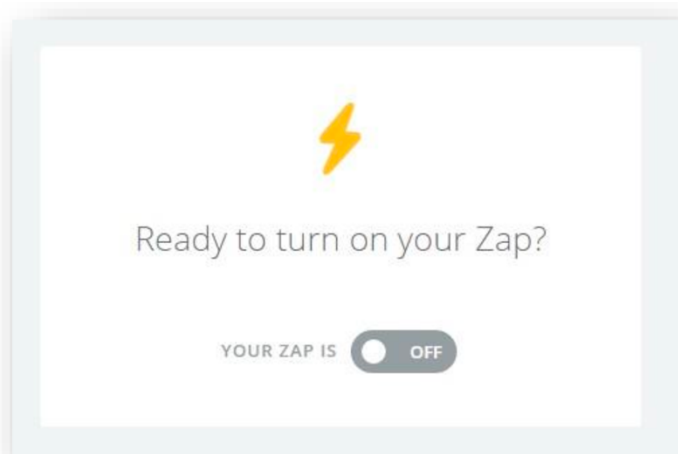o Click "Create & Continue"
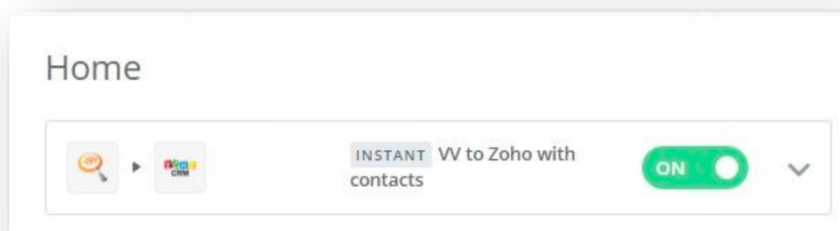

o Click "Finish"

o Now click the "OFF"switch to turn on your Zap

o Now you can monitor your new Zap from your Zapier Dashboard

This completes the sample integration of Merlin Intel with Zoho CRM. You can continue to add additional Zaps to integrate Merlin Intel with other application with ease. Please review the FAQ section for some answers to common questions.

Frequently Asked Questions

Zapier tiers their plans based on number of tasks per month, how many will I use?

o This depends on a number of factors but we provide you with the ability to control the number and type of notifications sent to Zapier by the following

o User Lead Handling rules
o Three available triggers for granular handling
o Job title filters to ensure only the interesting contacts are transferred
o Only the first 10 available contacts will be sent to Zapier

Can I filter my contacts to just the job titles I am looking for?

o Yes. We have a new feature called "Filter Contacts". This is a company-wide setting that will impact all users of the system. When you filter your contacts, you are selecting job titles that are interesting to your company and all others will be discarded. This will allow you to control the data you receive to make it the most actionable. This will also assist in controlling the cost of Zapier integration.

I want all of my notifications sent to Zapier, do I need to setup 3 separate Zaps to handle each trigger?
o Yes, but this gives you the granularity of how to handle each

Does Merlin Intel charge extra for Zapier Integration?

o No. Zapier integration is included in our base product; however, you will need to pay attention to the number of tasks used within Zapier as that is how they determine billing tiers.

Can I disable my automation from within Zapier?

o Yes. From the Zapier Dashboard just flip the "status" switch to off for the Zap you would like to disable. Once the API Key is setup in Merlin Intel, all integration and mapping is controlled from Zapier.