The background of the slide is white and filled with numerous colorful, irregular geometric shapes. These shapes, in shades of red, orange, yellow, blue, green, and purple, are scattered across the page, some pointing towards the center and others pointing outwards, creating a dynamic and modern aesthetic.

LeanData Connector App Integration

Confidential



How the G2 Connector App + LeanData Integration Works

The screenshot shows the LeanData interface within a Salesforce environment. The top navigation bar includes the LeanData logo, a search bar for Salesforce, and various utility icons. The main menu lists several categories, with 'G2 Buyer Intent' currently selected. Below the menu is a table of account and opportunity data.

Account Name	Location	Profile Views	Account Name	Opportunity	Action
> Huge	New York, United States		Account: Huge	Opportunity:	
> Global Facility Management & Construction	New York, United States	Profile Views: 1	Account: Global Facility Management & Construction	Opportunity:	
> Yext	New York, United States		Account: Yext	Opportunity:	
> SolarWinds	Texas, United States		Account: SolarWinds	Opportunity:	
> DRW	Illinois, United States		Account: DRW Trading Group	Opportunity:	
> Cloud Elements	Colorado, United States	Category Views: 2	Account: Cloud Elements	Opportunity:	
> FullContact	Colorado, United States	Category Views: 2	Account: FullContact Inc.	Opportunity:	

1. A potential customer conducts research on G2.
2. G2 defines the visitor's company information in the Buyer Intent report.
3. LeanData uses its fuzzy matching algorithm to auto-match the identification information with an existing account in Salesforce
 - a. Further workflows can be configured in LeanData, such as Lead and Account routing or notifications to the account owners based off of visits.



LeanData Integration

Salesforce Connector App - Buyer Intent



Authenticate G2 and LeanData

The API requires an authentication token for access. Check with your System Admin to verify that G2 and LeanData have authenticated tokens. If not:

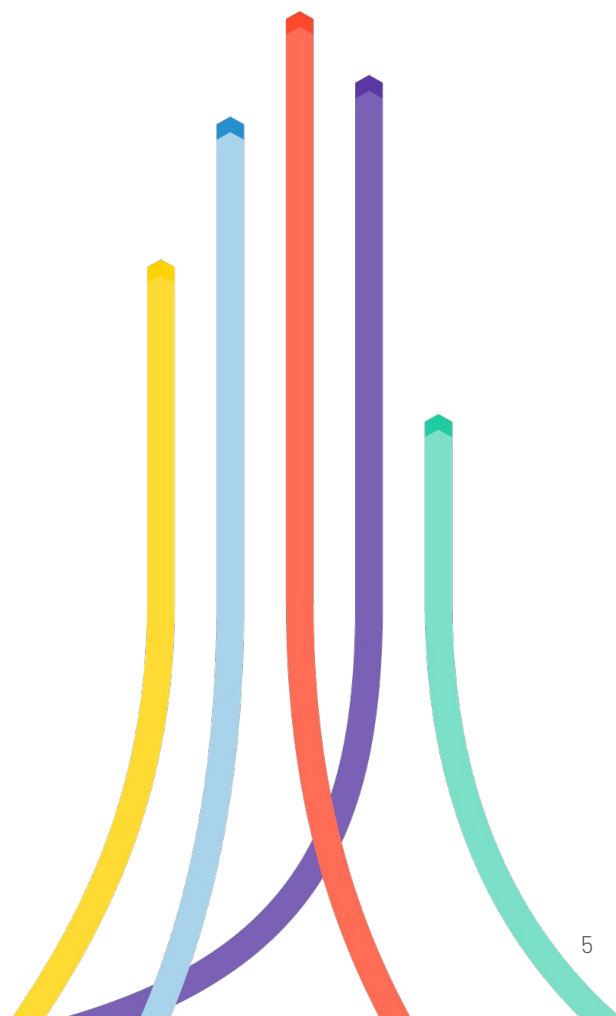
- **For G2:** If you do not current have the Salesforce app, reach out to your Account Manager letting them know you're interested. If you have the app, make sure it is installed and configured.
- **For LeanData:** Click into your LeanData homepage and authorize from there.

The screenshot shows the LeanData Enterprise user interface. At the top, there is a navigation bar with various menu items: Home, Chatter, Profile, Groups, Files, Leads, Accounts, Contacts, Opportunities, Reports, Dashboards, Products, Subscribers, Overlord, and LeanData (which is highlighted). Below the navigation bar is a dark header with the LeanData logo and the word "Enterprise". On the left side, there is a sidebar menu with "Home", "Matching", and "Routing" options. The main content area displays the text "Authorization Link | Enable LeanData product monitoring and access performance reports" and a prominent green button labeled "Authorize Salesforce Token". A "Hide This" link is visible in the top right corner of the main content area.



Authenticate G2 and LeanData

- Once you have completed the previous steps, contact G2 and LeanData at g2crowd@leandatainc.com.
 - Use the subject: Provision G2-LeanData Integration
 - Provide the Salesforce Instance ID
- Determine which user completed the 'Connect the API' step of the G2 app installation. Once that has been determined, provide class access to the LeanData API for the relevant Profile in Salesforce.
- To provide the class access:
 - Navigate to Setup
 - Click into Users
 - Click into Profile and find the Profile of the user you used to set up the G2 Crowd integration (whether that was yours or a specific integration user)
 - Edit Apex Class Access
 - Find 'LeanData.LeanDataAPI' and add to the Profile
- Confirm when done and the G2/LeanData teams will turn things on from there!





Notes About the G2 and LeanData Integration

- There is a limit of 10 calls per second of prolonged activity.
- There is a limit of 100 calls per second of burst activity.
- The average response time is ~1 second.
- Salesforce limits the API calls per 24-hour period.
 - If you know your Salesforce edition, view your organization's API limit [here](#).
 - If not, check Salesforce > Setup > Company Information > API Requests

