salesbox + Marketo®

Integration guide

We use the Marketo REST API to push **SalesBox leads to Marketo**.

Please check that your Marketo edition includes the API feature (not in Spark edition). The way the push feature works is straightforward. From any contact page, you can push/export contact data and company data to Marketo in order to:

- create a lead;

- update a lead (deduplication works on the lead email address);

- launch a workflow that can be specific depending on the SalesBox user pushing the button (send an email, add to a nurturing stream, change the lead owner, create an opportunity, etc.).

You need approximately 30 minutes to complete this configuration.

1. Create the web service in Marketo (5 minutes)

To activate the authentication of SalesBox to Marketo you need to create a custom service. You can follow this step-by-step guide:

http://developers.marketo.com/documentation/rest/custom-service/

2. Set-up of SalesBox (5 minutes)

In the SalesBox settings page (**http://app.salesboxinc.com**), select **Marketo Connector** and fill the following fields:

Marketo Instance URL:	https://221-YEJ-787.mktorest.com
Client ID:	c727ae1c-fd19-4e71-8541-417ff3a24a64
Client Secret:	U6oJPhwJMqOdzsazH3Wt0asrQUf5neZV
Status:	false
	Test Connection

This information can be found in your Marketo instance. Endpoint and Identity identifiers are in Admin > Web Services (REST API part):
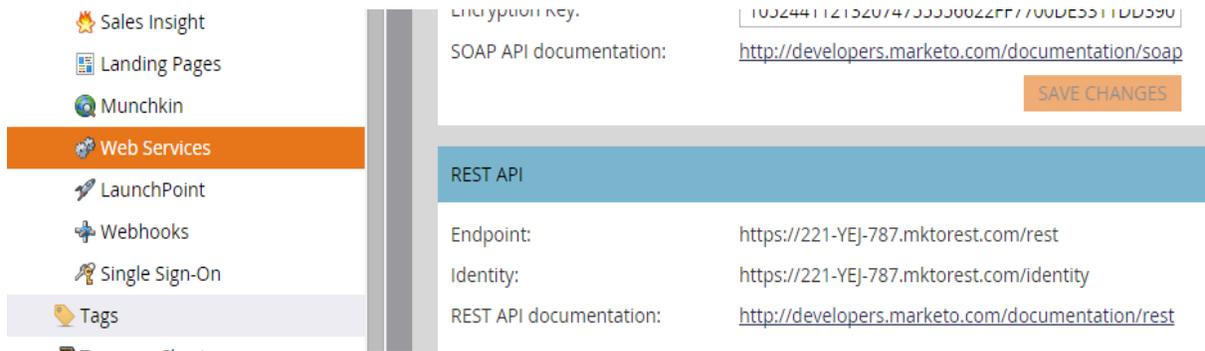
The fields Client ID and Client Secret are in Admin > LaunchPoint > My REST Service > View Details :
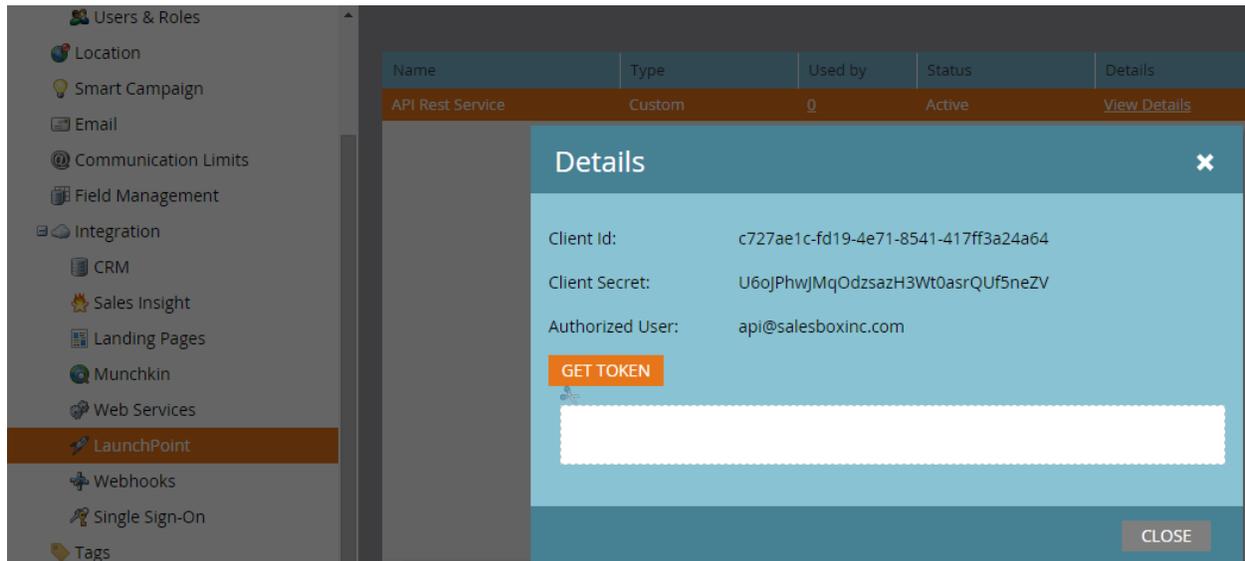
3. Field Mapping (2 minutes)

Map the fields that you are planning to send over from SalesBox to Marketo as shown in the example below. The fields on the left are Marketo fields and the fields on the right are SalesBox field names.

2. Send Lead JSON Template

Supported Merge fields:
{email} {firstname} {lastname} {company} {phone} {title} {address} {city} {state} {zip} {country} {twitter} {linkedin} {custom1} {custom2} {custom3} {custom4} {custom5} {custom6} {details} {asset} {industry} {employees}

```
{  "input":[
        {
          "email":"$email",
          "firstName":"$firstname",
          "lastName":"$lastname",
          "company":"$company",
          "mainPhone":"$phone",
          "title":"$title",
          "city":"$city",
          "state":"$state",
          "postalCode":"$zip",
          "address":"$address",
          "leadSource":"$asset",
          "industry":"$industry"
        }
]}
```

4. Send leads to market

Look-up for one of your Marketo lead in SalesBox and check that the main email is the same (we will check the deduplication feature here). From the SalesBox contact page, click on the button "Send to Marketo" :

Now go back to Marketo and find your lead. In the logs (Activity Details) you can see the data pushed from SalesBox. Marketo only logs new/updated data. If your lead has previously been exported, the only field that is updated is the SalesBox Insert Time field. You can choose to create a smart campaign based on this trigger.

5.Track the ROI of SalesBox leads

We recommend to create a simple workflow to track the source of leads you push from SalesBox to Marketo. Thus you can measure **the ROI of SalesBox leads, their conversion rates and their sales cycle velocity**. For example, create an entry " SalesBox Lead" in your field *Lead Source* and run a simple workflow to set the lead source whenever a lead is pushed (created or updated).

Useful Links :

http://developers.marketo.com/documentation/rest/

http://developers.marketo.com/documentation/rest/authentication/

http://developers.marketo.com/documentation/rest/custom-service/