RingLead

Marketo Integration Setup Guide

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About the RingLead Integration with Marketo

Using RingLead duplicate prevention Unique Web-to-Lead in conjunction with Marketo, clients will be able to further streamline their lead management process and maintain a cleaner database.

Getting Started

To get started, log in to RingLead, click the "Web-to-Lead" tab and select the appropriate Web Form Script from the dropdown and click "Go". To the right of the Marketo logo, click "Get Started with Marketo Integration".

| Home | Unique Upload | **Web-to-Lead** | Unique Entry | Data Cleanse | Support | Setup |

Declone Web-to-Lead configuration settings for **RingLead Test - John**

General Information

First Time using Declone Web-to-Lead?
View the Quickstart Guide

Web Form Script #1

Description: `Declone Web-to-Lead Script (1)`

A description of the web forms processed by this web form script.
Example: "Website marketing forms"

Salesforce Username: `jkosturos@ringlead.demo.org`   **Login successful. User is valid.**

Example: username@company.com
(enter the Salesforce login Username above, typically a Marketing User or System Administrator profile)

Salesforce Password: ` `

Web Form Field Names: `Salesforce Web-to-Lead names (default) ⬍` Learn more about Web Form Field Names

Link to Salesforce Sandbox: This Web form script is NOT configured to be connected with a Salesforce Sandbox organization.
Learn how to point this RingLead script to a Salesforce Sandbox

Form Action URL: **https://salesforce.ringlead.com/cgi-bin/2768/1/dedup.pl**
(provide your webmaster with the Form Action URL above)

[Update]

Advanced Configurations - Learn more in the Declone Web-to-Lead Advanced Options Guide

New and Matching Leads, Contacts and Accounts Settings
Configure field actions, Campaigns, search logic, new Lead creation, auto-response and more.
Configure Options for Matching Leads, Contacts and Accounts

Task Settings
Change the options for the Task Activity created for the owner of the Lead, Contact, Opportunity and/or Account.
Configure Task Settings

Partner Integrations

Marketo
Email Automation and Lead Management with Marketo
Using RingLead de-duplication tools in conjunction with Marketo, clients will be able to further streamline their lead management process and maintain a cleaner database.
Get Started with Marketo Integration

ELOQUA
Email Automation and Lead Management with Eloqua
Using RingLead de-duplication tools in conjunction with Eloqua, clients will be able to further streamline their lead management process and maintain a cleaner database.
Get Started with Eloqua Integration

To access the SOAP API, and connect your RingLead account to Marketo, log into Marketo, click **Admin,** then **Web Services** in the left navigation panel. Copy the SOAP Endpoint, User ID, and Encryption Key from Marketo, and paste into RingLead each of the three fields below. Complete the form fields and click ***Verify Marketo Connection***.

Marketo API Connection

Login to Marketo > Admin > Integration > SOAP API

Copy and paste the following fields from Marketo Admin:

SOAP endpoint

Access Status   (be sure this is "Active")

User ID

Encryption Key

Verify Marketo Connection

Click the red button **"Setup the Web-to-Lead Webhook"** at the bottom.

Marketo API Connection

Your Marketo Connection is Verified

Change Marketo Connection

Data Shield Webhook

Enforce data standards with Data Shield. Complete the Data Shield for Marketo setup process using the Data Shield License Key below. Return to RingLead to complete the setup of your RingLead Web-to-Lead Marketo webhook.

Contact RingLead for your Data Shield License Key

Once you have the Data Shield License Key, click Activate Data Shield below.
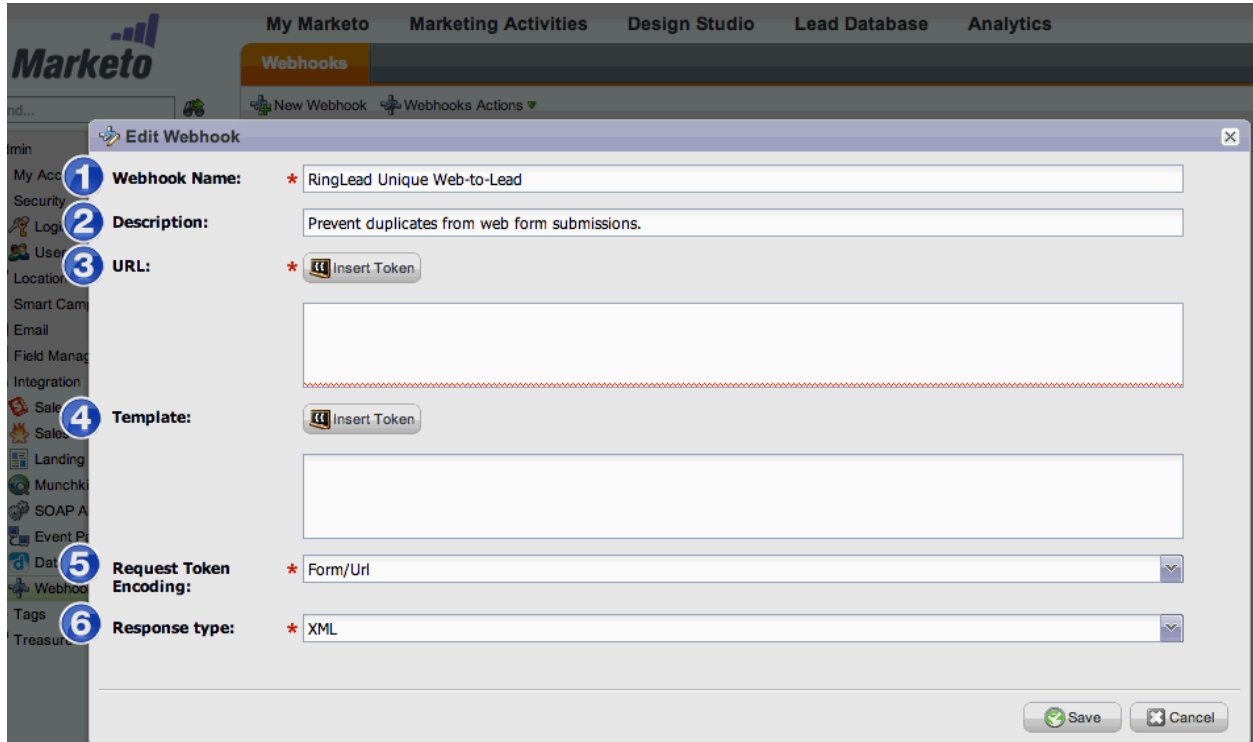
Activate Data Shield

RingLead Web-to-Lead Webhook

Unique Web-to-Lead Script	Declone Web-to-Lead Script (1)
Script Number	1

Setup the Web-to-Lead Webhook

Approximate time to complete all steps: 15-25 minutes

Create the Marketo Webhook

First, create a Webhook for the integration. Only one Webhook is required for Unique Web-to-Lead. Login to Marketo and create a new Marketo Webhook. Navigate to "Webhooks" in Marketo

Log in to **Marketo** > **Admin** > **Integration** > **Webhooks** > **New Webhook**

1. Copy and paste the Webhook name
2. Copy and paste the description
3. Enter the unique URL
4. Create the template (see below)

Copy and paste the following template into the webhook template:

first_name={{Lead.First Name}}&last_name={{Lead.Last Name}}&email={{Lead.Email Address}}&company={{company.Company Name}}&phone={{lead.Phone Number}}&URL={{company.Website}}&street={{lead.Address}}&city={{lead.City}}&state={{lead.State}}&zip={{lead.Postal Code}}&country={{lead.Country}}&salutation={{lead.Salutation}}&title={{lead.Job Title}}&mobile={{lead.Mobile Phone Number}}&fax={{lead.Fax Number}}&industry={{company.Industry}}&oid=00D300000006Rmc&RL_marketo=merge&RL_marketoID={{lead.id}}&RL_new_lead=disable&retURL=SFDCID_returnError

5. For Request Token Encoding, select "Form/Url" from the dropdown
6. For Select Response Type, select "XML" from the dropdown

Considerations

Q: Has the Field Mapping to Salesforce Standard fields been changed from default?

Some of the standard fields above need to be changed if your forms contain fields which are not the default Salesforce mapped fields. For example, if your form contains Mailing Street instead of Address, then you must change {{lead.Address}} to {{company.Mailing Street}} . The mapping between a Salesforce field and its corresponding Marketo field, navigate to Admin > Field Management > Field Mapping. Use the Insert Token button above this Template field in the Webhook to update the template, such as {{company.Mailing Street}}.

Q: Do your forms contain Salesforce Fields which need special attention?

To enable RingLead to update Salesforce fields when an existing Salesforce Lead/Contact is found, just add the field to the Marketo template above and set the field action in RingLead. Marketo Webhook Example to add at end of template:
&00NC00000012345={{Lead.Customer Number}}

Note the "&" is to separate each field mapping in the template. The first next part is 00NC00000012345 and is an example of a Salesforce Custom Field ID found in Salesforce > Setup > Web-to-Lead and the next part (following the "=" sign) is {{Lead.Customer Number}} and is an example of a Marketo Token which can be inserted with the "Insert Token" button found above the template.

Log in to RingLead and set the Web-to-Lead Field Action:
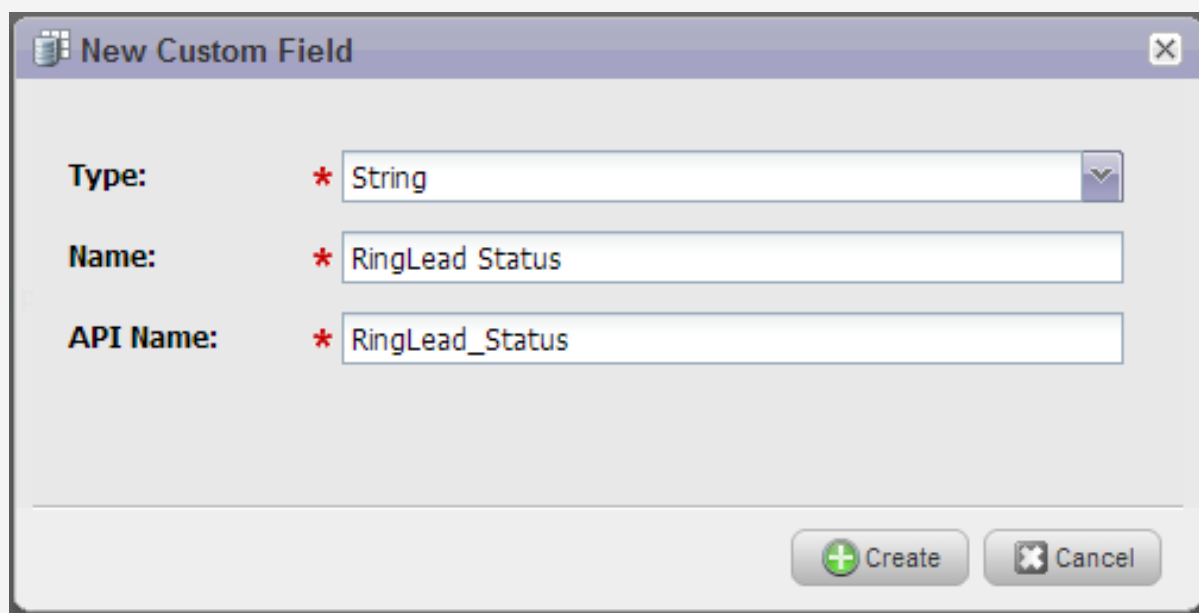Customer Number field action set to "Overwrite"

Response Mapping

Next, create a custom field as a flag for when RingLead has processed a new Marketo lead. Navigate to Marketo Admin and Create a New Custom Field with the Type, Name and API Name below. This custom field is for RingLead to trigger Marketo to create a new Salesforce Lead if RingLead was not able to match an existing Salesforce Lead/Contact/Account.

Login to *Marketo* > *Admin* > *Field Management* > *New Custom Field* and enter the following values:

Type	*Select String*
Name	*RingLead Status*
API Name	*RingLead_Status*

Configure Webhook Response Mapping

Finally, add the custom field to the Webhook. Edit the "RingLead Web-to-Lead" Webhook previously created and add and configure a Response Attribute and Marketo Field mapping as defined below. This response mapping will be used to trigger Marketo to create a new Salesforce Lead.

Login to *Marketo* > *Admin* > *Integration* > *Webhooks* > *RingLead Web-to-Lead*

Caution: Confirm the Marketo Field 'RingLead_Status' was saved correctly. You may need to log out and back into Marketo for the Response Mapping to save correctly.

Response Attribute ringlead-response.salesforce-new-record
Marketo Fields RingLead_Status
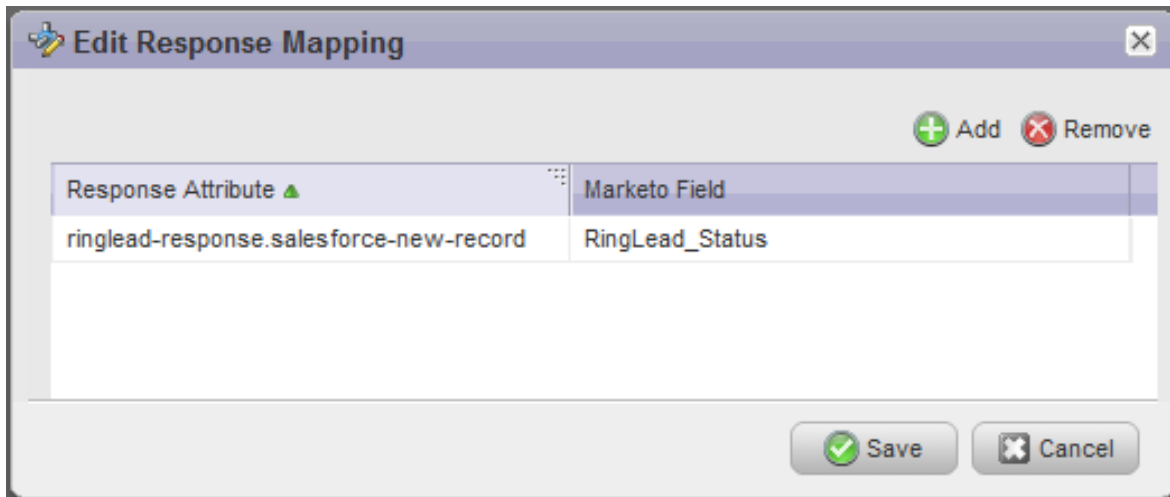
Create the Marketo Program and Campaign
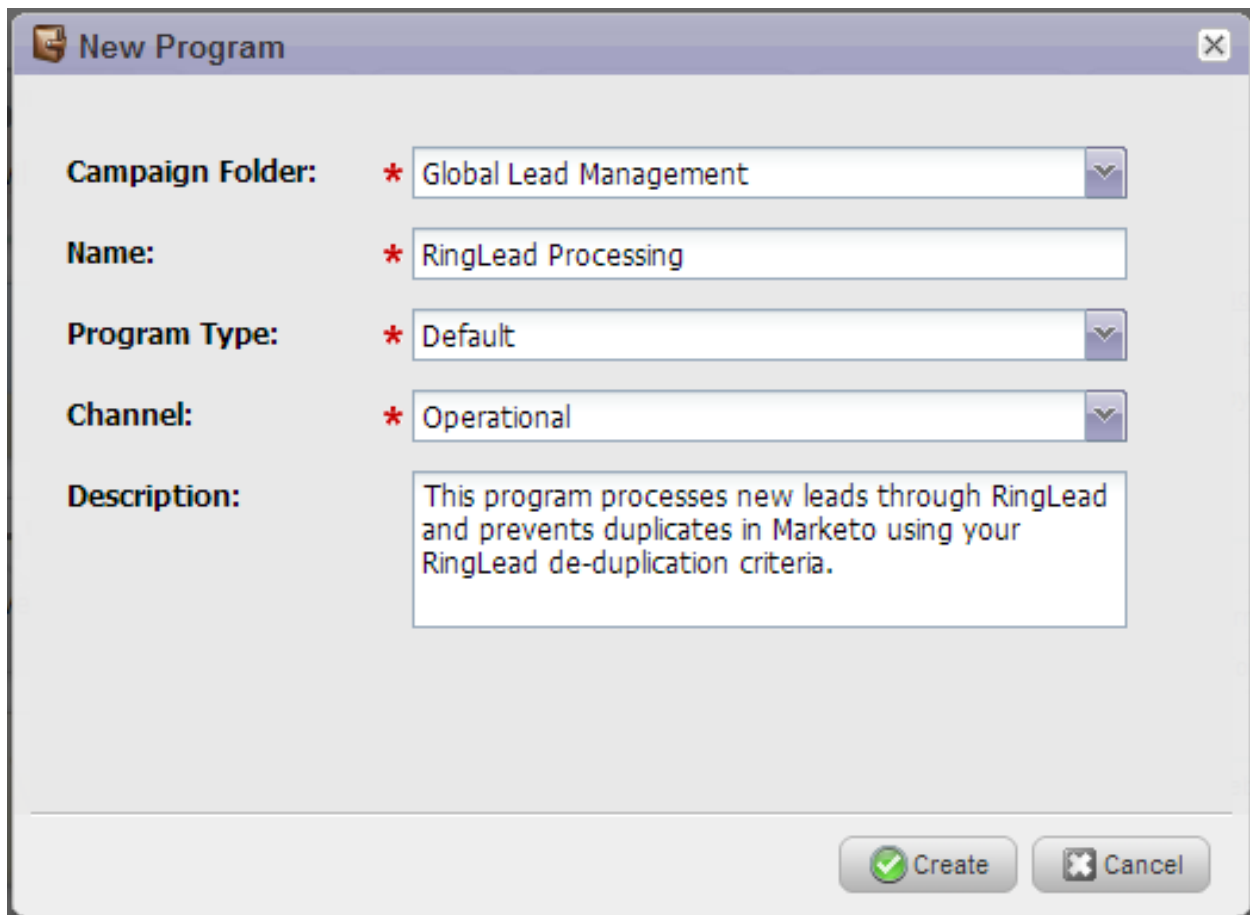
Create the Program and Smart Campaign. If you need RingLead to create new Contacts in matching Accounts, complete the setup guide included in the first step below. Complete the two sections below.

Approximate time to complete steps below: 5 minutes (20 minutes if creating new Contacts in matching Accounts)

Create the Marketo Program

First, create the program to prevent duplicates on all new Marketo leads. Navigate to **Marketing Activities** and create a new program named **RingLead Processing**

Login to **Marketo** > **Marketing Activities**

Salesforce Tasks created by RingLead

RingLead Web-to-Lead can be configured to create Salesforce Tasks. **Consider disabling each below**:
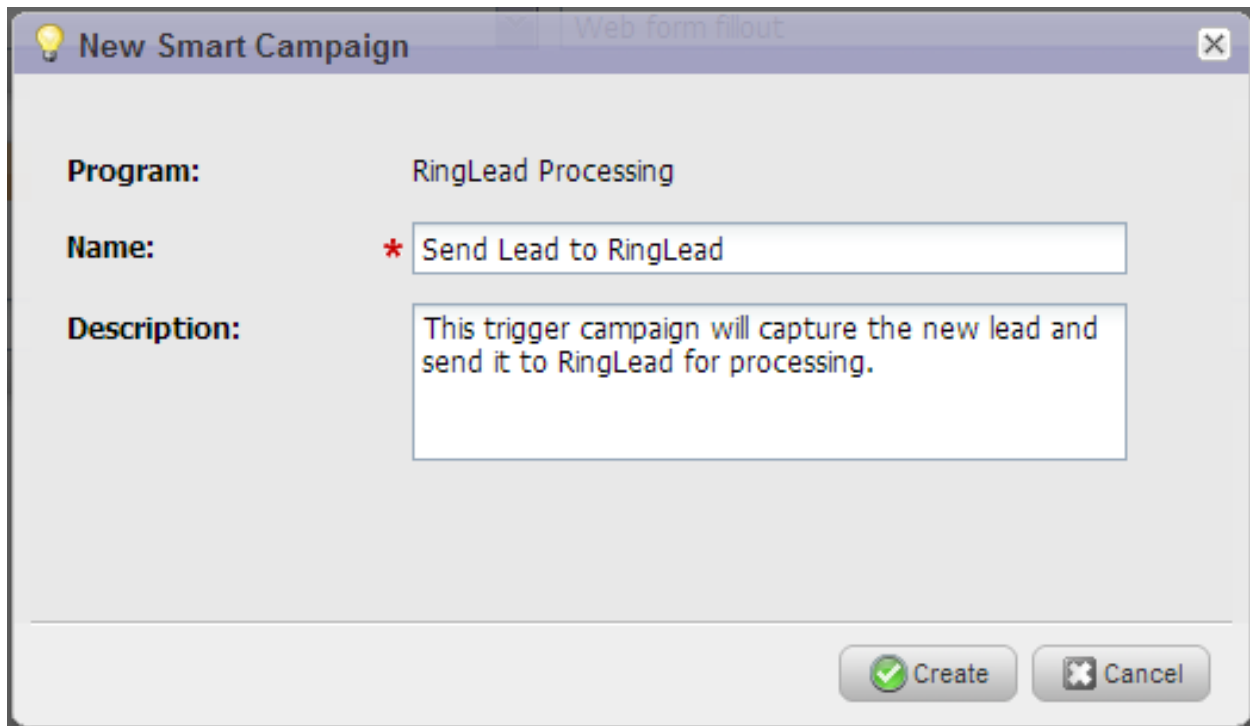
- Create a Salesforce Task for New Leads
- Create a Salesforce Task for the Owner of the matching Lead
- Create a Salesforce Task for New and Matching Contacts
- Create a second Salesforce Task for New and Matching Contacts

Create "Send Lead to RingLead" Smart Campaign

Create a custom field as a flag for when RingLead has processed a new Marketo lead.

1) Create a new Smart Campaign in the RingLead Processing Program named Send Lead to RingLead

|	
Name	Send Lead to RingLead
Description	This trigger campaign will capture the new lead and send it to RingLead for processing.

2) Click the Smart List tab for the Send Lead to RingLead Smart Campaign and Add a Trigger for Lead is Created
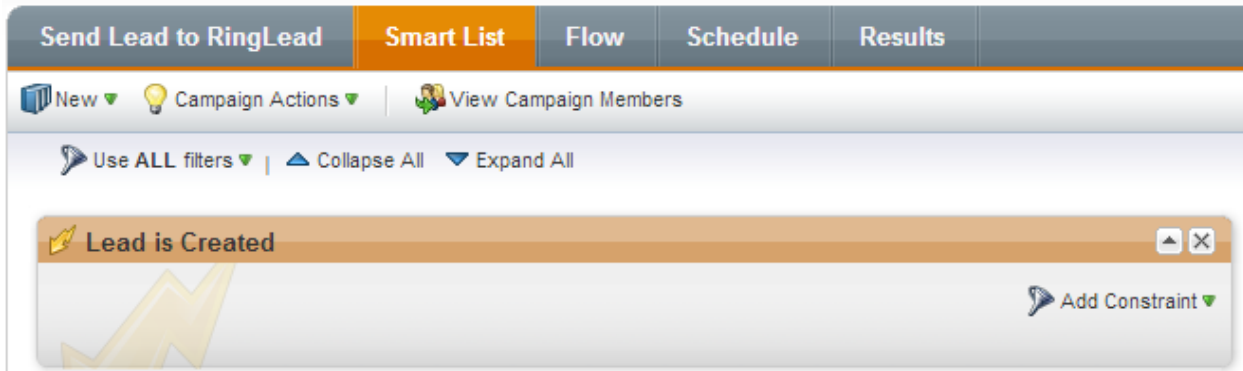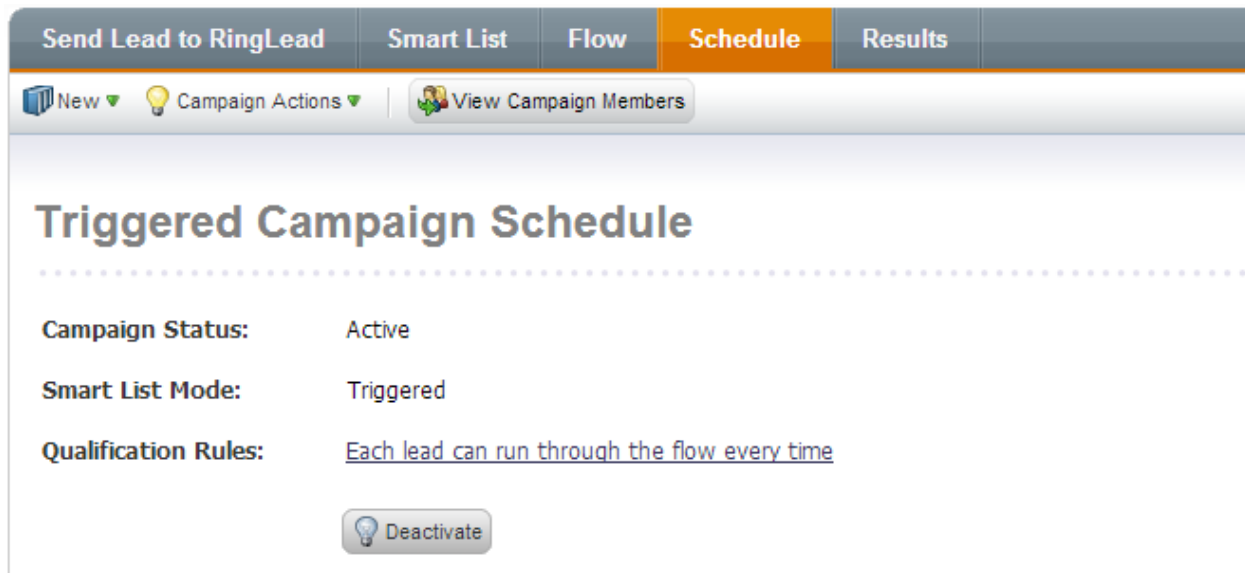

3) Click the Flow tab for the Send Lead to RingLead Smart Campaign and Add a Flow Action for Call Webhook and choose RingLead Web-to-Lead.
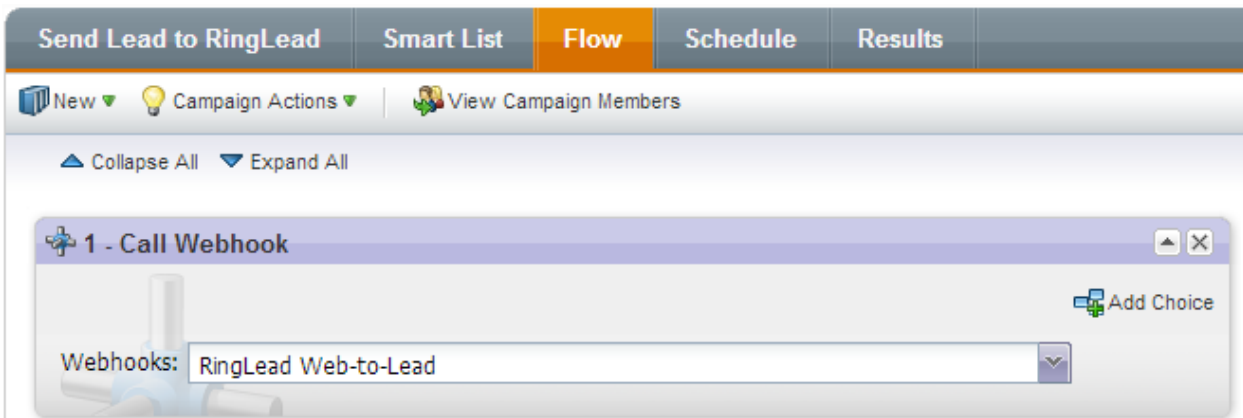
4) Click the Schedule tab and Edit the Qualification Rules to Run each lead through the campaign flow every time
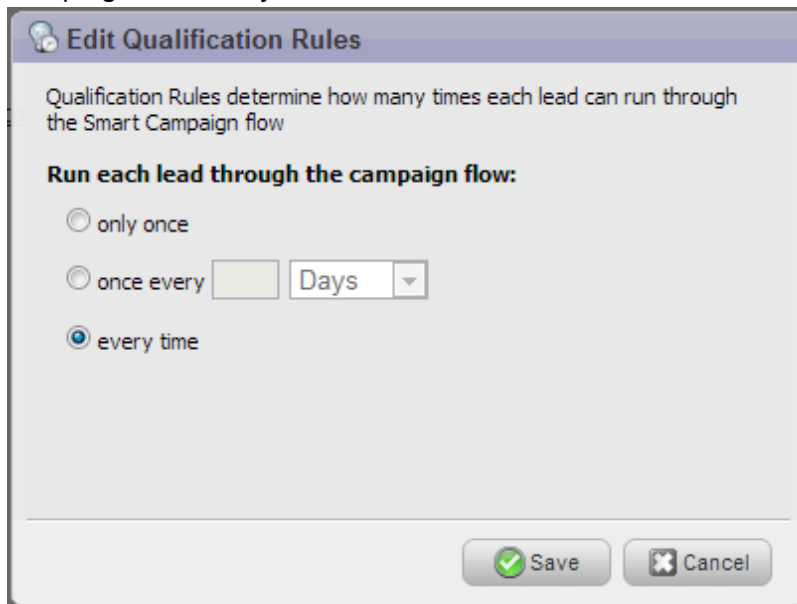
5) Activate the Smart Campaign

To Create new Salesforce Contacts in existing Accounts

[How to Create new Salesforce Contacts in existing Accounts](#)

Enable Account Based Lead Routing to support Account Based Marketing

New Marketo leads which do not match existing Salesforce Leads or Contacts can be linked to matching Accounts, yet remain as Leads in Salesforce. Company data from Accounts is the single master data source containing more data and more accurate data while eliminating the duplication of company data and the efforts involved in gathering this data.

Changes in RingLead
Once your RingLead Account Based Lead Routing access is granted, you will see the new features below under "Search for an existing Account". This page can be found by clicking the Web-to-Lead tab, selecting your script, and clicking "Configure Options for Matching Leads, Contacts and Accounts".

Changes in Marketo

If you are checking any of the options to Convert Lead in RingLead, be sure the "New Contact at Matching Account" setup has been completed. In the Marketo Webhook, you should see a field in the payload template "**convertedStatus**". Instructions to set this up are in the "Create Marketo Program" section above to enable "New Salesforce Contacts in existing Account."

Next, the Webhook Response Mapping needs to include one more field mapping for RingLead to respond back and insert the matching Salesforce Account ID to link it when a Salesforce Lead is created.

Response Attribute ⌄	Marketo Field
ringlead-response.salesforce-accountid	Linked_Account__c

Marketo Best Practices

1. To prevent duplicate Salesforce Leads create by Marketo before RingLead processes the new Marketo lead:

Confirm there is only a single Smart Campaign Smart List Trigger for all new Marketo leads:
Marketo Campaign Smart List: **"Lead is Created" with constraint: Source Type is not salesforce.com"**

If RingLead "Create New Salesforce Contact" feature is enabled, be sure to remove the constraint above:
"Source Type is not salesforce.com"
And CHANGE to just a :
"Lead is Created" trigger in the Smart List.

2. If your Marketo has more than one "Lead is Created" trigger Smart Campaign:

Configure Marketo and Salesforce to Prevent New Leads from Being Synced to Salesforce Before the RingLead Webhook has Completed

3. Prevent Temporary Salesforce Leads from being assigned to a Salesforce User
If RingLead is configured to create a New Salesforce Contact in matching Accounts (no matching Lead or Contact was found), it is necessary for a temporary Salesforce Lead to be created until the Marketo sync occurs (typically about 2-10 minutes). To prevent sales or anyone from viewing this temporary Salesforce Lead, complete the following steps:

- Create a Salesforce Queue "RingLead Holding Queue"
- Create a Rule in your Salesforce Assignment Rules:
- If Lead Field "RLMKTO1" is not empty,
- assign to a temporary Salesforce Queue "RingLead Holding Queue"