

Marketo Integration Setup Guide



Table of Contents

About the RingLead Integration with Marketo **Getting Started** Create the Marketo Webhook Considerations Response Mapping Configure Webhook Response Mapping Create the Marketo Program and Campaign Create the Marketo Program Salesforce Tasks created by RingLead To Create new Salesforce Contacts in existing Accounts Salesforce Changes for New Contacts in existing Accounts RingLead Changes for New Contacts in existing Accounts Marketo Changes for New Contacts in existing Accounts Create the Smart Campaign Enable Account Based Lead Routing to support Account Based Marketing Marketo Best Practices 1. To prevent duplicate Salesforce Leads created by Marketo before RingLead processes the new Marketo lead: 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



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			
De	Decione Web-to-Lead configuration settings for RingLead Test - John								
G	eneral Information								
	First Time using Declone Web-to-Lead? View the Quickstart Guide								
		Web Form Script	t #1						
	Descriptio	on: Declone Web-to-	Declone Web-to-Lead Script (1)						
		A description of th Example: "Websit	e web forms processe e marketing forms"	d by this web form scr	ipt.				
	Salesforce Usernan	ne: jkosturos@ringle	ad.demo.org	Login succes	ssful. User is v	valid.			
		Example: usernar (enter the Salesfo	ne@company.com	ove typically a Marke	ting User or Sv	stem Admini	strator profile)		
	Salesforce Passwo	rd:	i oo login oooname al	oro, typicany a Marke	ang ober of by	atern Plantinis	stator promoy		
	Web Form Field Name	es: Salesforce Web	-to-Lead names (de	fault) + Leam mor	e about Web Fo	orm Field Na	mes		
L	ink to Salesforce Sandb	ox: This Web form sc	ript is NOT configured	to be connected with a	a Salesforce Sa	ndbox organ	ization.		
		Learn how to poin	it this RingLead script	to a Salesforce Sandb	DX				
	Form Action UF	RL: https://salesforc/ (provide your web)	e.ringlead.com/cgi-bi master with the Form	n/2768/1/dedup.pl Action URL above)					
				,					
		Update							
	dvanced Configuration	e - Learn more in the I	Declone Web-to-Lead	Advanced Ontions Gui	do				
	divanced comgutation			Revalleed Options Out	uu				
	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									
P	artner Integrations								
Email Automation and Lead Management with Marketo Using RingLead de-duplication tools in conjunction with Marketo, clients will be able further streamline their lead management process and maintain a cleaner database. Get Started with Marketo Integration					l be able to latabase.				
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					be able to latabase.				



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							

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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
Ringl ead Web-to-Lead Webbook
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

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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

		My	Marketo	Marketing Activities	Design Studio	Lead Database	Analytics	
Mark	eto							
nd	#	New New	/Webhook 🤘	Webhooks Actions 🛡				
Imin	🤣 Edit Webhook							×
My Acc	Webhook Name:	*	RingLead Ur	nique Web-to-Lead				
	Description:		Prevent dup	licates from web form submiss	ions.			
Location	URL:	*	Insert Tol	ken				
Smart Cam								
Email Field Manac								
Integration								
🖗 Sale	Template:		Insert Tol	ken				
Landing								
SOAP A								
1 Dat 5	Request Token	*	Form/Url				~	
💠 Webhoo	Encoding:							
Tags 6	Response type:	*	XML				~	
							Save 🖾 Can	cel

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}}&stat
e={{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=00D30000006Rmc&RL_marketo=mer
ge&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

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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:

Туре	Select String
Name	RingLead Status
API Name	RingLead_Status

I New Custom	n Fiel	d	×
Type:	*	String	
Name:	*	RingLead Status	
API Name:	*	RingLead_Status	
		Create Cancel	



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

🤣 Edit Response Mapping	×
	🕒 Add 🔞 Remove
Response Attribute 🛦	Marketo Field
ringlead-response.salesforce-new-record	RingLead_Status
	Save 🔛 Cancel



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*

😼 New Program		×
Campaign Folder:	* Global Lead Management	
Name:	* RingLead Processing	
Program Type:	* Default	
Channel:	* Operational	5
Description:	This program processes new leads through RingLead and prevents duplicates in Marketo using your RingLead de-duplication criteria.	
		-
	Create Canc	el

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.

💡 New Smart Campa	ign Web form fillout	×
Program:	RingLead Processing	
Name:	* Send Lead to RingLead	
Description:	This trigger campaign will capture the new lead and send it to RingLead for processing.	
	Create Canc	el

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.

Send Lead to RingLead	Smart List	Flow	Schedule	Results				
🗊 New 🔻 🂡 Campaign Actions 💌 🦓 View Campaign Members								
▲ Collapse All 🔍 Expand All								
💠 1 - Call Webhook	🗣 1 - Call Webhook 💌 💌							
Add Choice								
Webhooks: RingLead Web-to-Lead								

4) Click the Schedule tab and Edit the Qualification Rules to Run each lead through the campaign flow every time



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5) Activate the Smart Campaign							
Send Lead to RingLead	Smart List	Flow	Schedule	Results			
🗊 New 🔻 💡 Campaign Action	ns 🔻 🛛 🦓 View Ca	impaign Memb	ers				
Triggered Campaign Schedule							
Campaign Status:	Active						
Smart List Mode:	Triggered						
Qualification Rules:	ion Rules: Each lead can run through the flow every time						
	Peactivate						

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".

14

Search for an existing Ac If an Account exists from th Contact will be owned by th	count e same company, a new Contact will be creat e Account owner. Learn how to create and co	ted in the matching Account instead of a new Lead. The onvert a Lead for an existing Account		
Link Lead to Accourt	at and Do Not Convert Lead to a new Conta	act. Learn how to link a new Lead to the matching Account		
No Lead Lookup Re	elationship fields found in Salesforce ᅌ	Link the matching Account using a Lead Custom Field (Lookup Relationship) Learn about Assignment Rules		
Convert Lead If an C Task Subject for the C	open Opportunity Exists Open Opportunity Owner:	If the matching Account has an Open Opportunity, convert the new Lead to a Contact and create a Task.		
Enter Salesforce Tas	k Subject for Open Opportunities here			
Convert Lead and C Select Account Type(Prospect Customer - Direct Customer - Channel Channel Partner / Re	reate a Task for Specific Account Types s): seller	If the matching Account Type field is any value selected, create a Task.		
Task Subject for Acco	unt Owner if Account Type is Selected Above	e.		
Enter Salesforce Tas	k Subject for Account Types here			
Set Lead Owner to A Select a Hierarchy Lo Select a User Hiera	okup custom User field: rchy Lookup field	If matched to an Account, set the Lead Owner to the BDR assigned to the Account Owner. This mapping available if in Salesforce Setup a User custom Hierarchy Lookup field has been created. This allow		
		an AE User to be linked to a BRD User.		

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 "<u>Create</u> <u>Marketo Program</u>" 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 Mappings		
	Response Attribute 4	Marketo Field
	ringlead-response.salesforce-accountid	Linked_Accountc



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:

<u>Configure Marketo and Salesforce to Prevent New Leads from Being Synced to</u> 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"

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