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QUICK START GUIDE

Marketo Integration

with BulkSMS.com

Connect Marketo to the BulkSMS Integration Gateway, send SMS from your Smart Campaigns with a webhook, see deliveries and replies on your leads, and send bulk SMS to lists and programs.



Welcome to BulkSMS.com

Trusted, scalable SMS messaging for your business

IN THIS GUIDE

01 Connect Marketo with your API details

02 Send SMS from Smart Campaigns

03 Create templates and send bulk SMS

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01 Foreword

The Marketo integration works in two ways: **Smart Campaigns** send an SMS by calling a Marketo webhook, and **Bulk Messages** send one SMS to every lead in a Marketo list or program. Before you start, make sure you have the following ready.

BulkSMS account

Sign up at www.bulksms.com and sign in to the Integration Gateway

Marketo API details

Client ID, Client Secret, REST API Endpoint and REST Identity Endpoint, usually issued by your Marketo administrator

Mobile numbers

Your leads' **Mobile Phone Number** field, ideally with the country code

New accounts get a few free test credits. If you need more, email support@bulksms.com with the subject **Marketo Integration – test credits required**, your company name and your BulkSMS username (it is case sensitive).

i The webhook alone is enough to send SMS from Smart Campaigns. The Marketo API details are needed for bulk messages, and for delivery reports, replies and SMS activities to reach your leads.

02 Marketo Preparation

API details

The Integration Gateway signs in to Marketo's REST API as an API user. In Marketo, your administrator creates the API user and a custom LaunchPoint service for it, then gives you four values:

FIELD IN THE INTEGRATION GATEWAY	WHAT IT LOOKS LIKE
Client ID	From the LaunchPoint service's details, e.g. `1a2b3c4d-5e6f-4a7b-8c9d-…`
Client Secret	From the same place. Keep it private.
REST API Endpoint	`https://123-ABC-456.mktorest.com/rest` – must end in `.mktorest.com/rest`
REST Identity Endpoint	`https://123-ABC-456.mktorest.com/identity`

> *i* The API user's role needs permission to read and write leads and activities, and to create custom activities. Without activity permissions Marketo returns error 603 (access denied) and Activity Updates can't be set up.

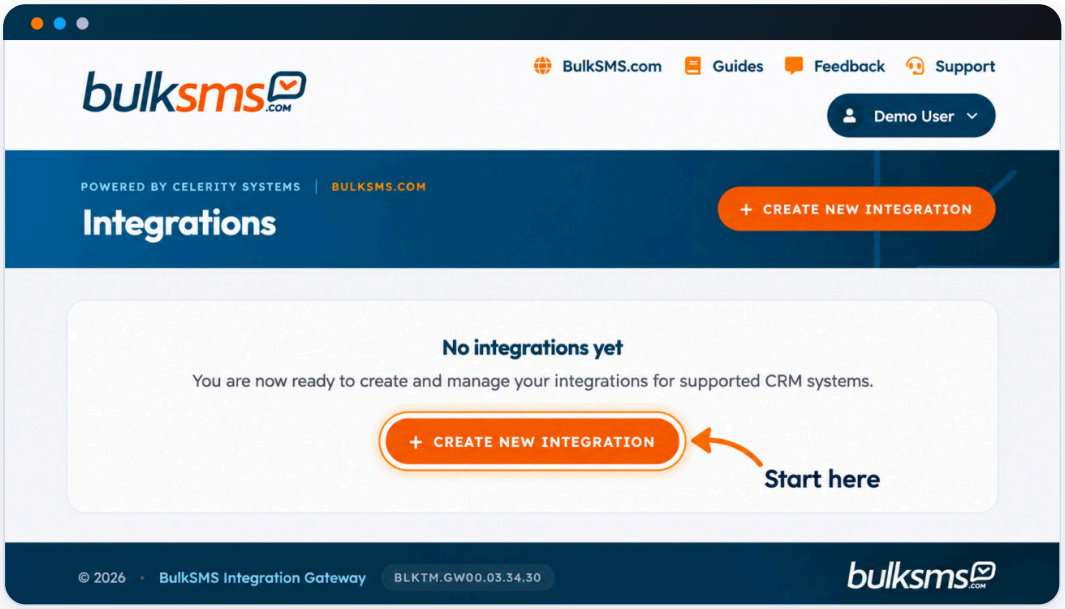
Custom lead fields

Delivery reports and replies are written to custom fields on the lead. Create these three fields in **Admin → Field Management** (type String). The API names must match exactly—they are case sensitive.

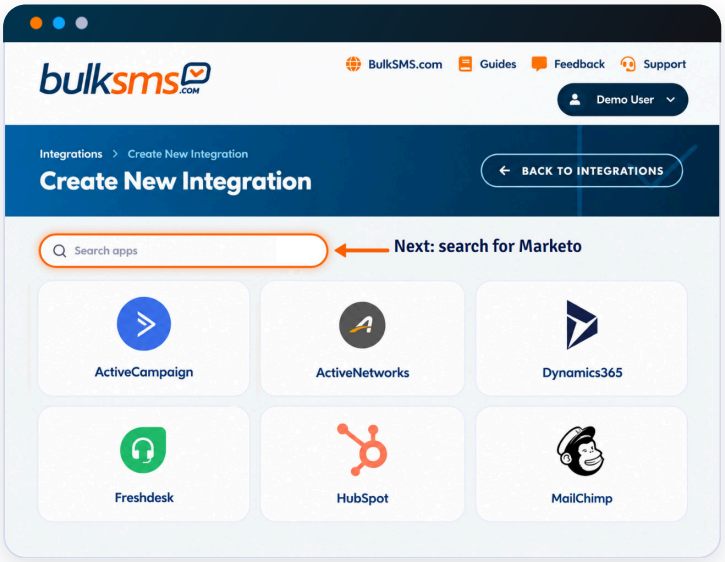
FIELD NAME	API NAME	HOLDS
SMS Delivery Status	`sms_delivery_status`	The delivery status of the last SMS sent to the lead
SMS Reply	`sms_reply`	The text of the lead's last reply
SMS Program Id	`sms_programid`	Written together with each reply—the reply update needs this field to exist

03 Integration Setup

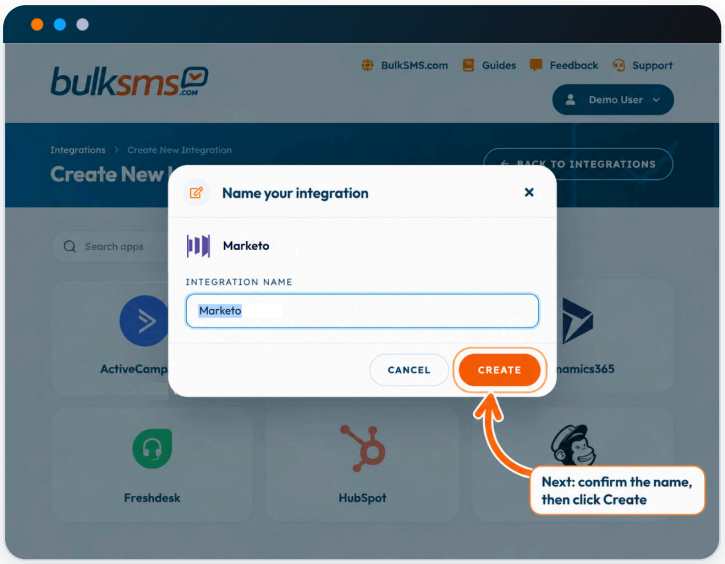
1. Sign up or log in to the BulkSMS Integration Gateway at www.bulksms.com/integration-gateway and click **Create New Integration**.



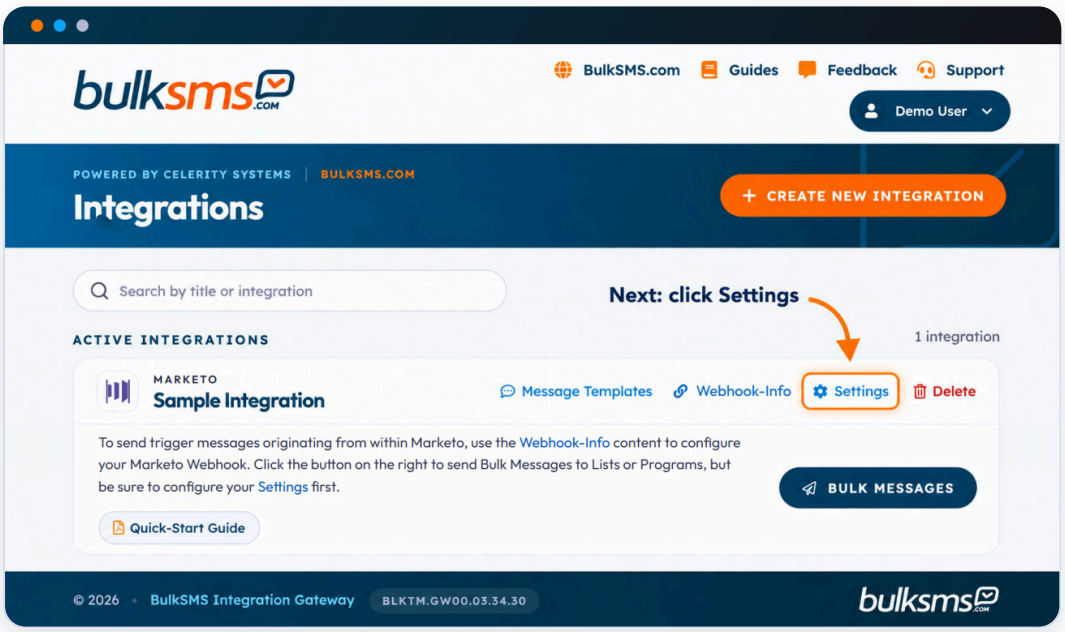
2. Type **Marketo** in **Search apps** (or scroll down) and select **Marketo**.



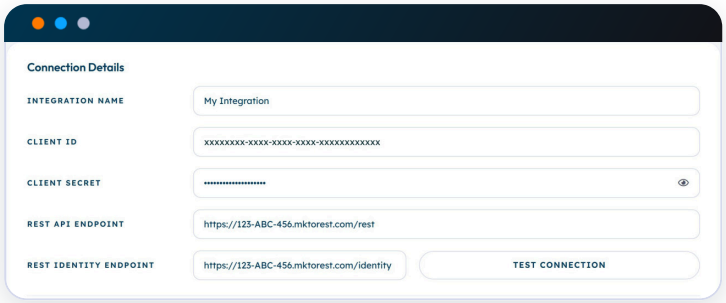
3 Give your integration a name, or keep the one suggested, and click **Create**. The name can use letters, numbers, spaces, hyphens and underscores, up to 40 characters.



4 Your integration now appears on the Integrations page, with **Message Templates**, **Webhook-Info**, **Settings** and **Delete** links. Click **Settings**.



5 Under **Connection Details**, enter your **Client ID**, **Client Secret**, **REST API Endpoint** and **REST Identity Endpoint**, then click **Test Connection**. When the test passes, the fields turn green and the API user is shown as **Account Holder**.



6 Complete the rest of the page, then click **Save Settings**:

- **Default Country Code** – added to numbers that don't include one (see Sending Tips). **Force Country Code** changes when it is added to bulk messages.
- **Notification E-Mail** – where the Integration Gateway sends notifications about this integration.
- **Activity Updates** – tick **Enabled** to get delivery reports, replies and SMS activities in Marketo (see the next section).

Saving checks your Marketo details again and returns you to the Integrations page with **Successfully saved settings.**

! Always use **Test Connection** before saving. Saving only checks the Client ID, Client Secret and Identity Endpoint—a mistyped **REST API Endpoint** is only caught by the test, and bulk messages and updates to Marketo will fail until it is fixed.

04 Activity Updates & Two-Way SMS

Activity Updates show what happens to your messages in Marketo: an activity on the lead when an SMS is sent, delivered or fails, and when the lead replies. They also switch on delivery reports and replies to the lead's custom SMS fields.

Choose what's recorded

On the Settings page, tick **Enabled** under **Activity Updates**. Each message type can then be set to **Include body** (the default—the activity includes the message text), **Exclude body** or **Disabled**. Click **Save Settings**; the first save creates the SMS activity types in your Marketo instance.

OPTION	WHAT IT RECORDS IN MARKETO
Sent Messages	A **Send SMS** activity each time an SMS is sent, from a webhook or a bulk message.
Status Updates	A **Deliver SMS** or **Fail SMS** activity (with the reason), and the status in `sms_delivery_status`.
Reply Messages	A **Reply SMS** activity with the reply text, and the reply in `sms_reply`.

Activities also show the list or program, template and Marketing Code. Delivery reports are sent in batches, so they can take a few minutes; replies arrive straight away.

Use SMS activities in Smart Campaigns

The activity types can start or filter Smart Campaigns. Use the triggers **Send SMS**, **Deliver SMS**, **Fail SMS** and **Reply SMS**, or the filters **SMS Sent**, **SMS Delivered**, **SMS Failed** and **SMS Replies**—for example, to follow up when a lead replies or to clean up numbers that fail.

Good to know

- Delivery reports and replies only reach Marketo while Activity Updates is **Enabled** and the option isn't **Disabled**.
- Leads can only reply to messages sent from a **(repliable)** sender or a phone number—not from a sender name.
- A reply is linked to the lead you last messaged on that number. Webhook messages are only linked to a lead when the URL includes `lead_id={{lead.ID}}`, as the Webhook-Info URL does.
- If **Enabled** is unticked when you return, tick it again and click **Save Settings**.

05 Automation Setup

To send an SMS automatically—for example a welcome message when a lead fills in a form—create a Marketo webhook that calls the Integration Gateway, then call it from a Smart Campaign.

Webhook-Info page

Click “Webhook-Info” on your Marketo integration card for the URL and Template to paste into Marketo.

OPEN →

Marketo Integration Guide

Screenshots of creating the webhook and Smart Campaign in Marketo. Also on the Guides page.

OPEN →

1. Copy the webhook details

- On the Integrations page, click **Webhook-Info** for your integration.
- **Marketing Code (optional)** – a code such as `SUMMERSALE` that is added to the URL and recorded on the SMS activities. Letters and numbers only, under 20 characters.
- Click the copy icon next to **URL**. It looks like `https://www.bulksms.com/integration-gateway/webhook/v1/message/<your-key>?lead_id={{lead.ID}}`.
- Click the copy icon next to **Template**. It contains `"to"`, `"body"` and your BulkSMS sign-in details in encrypted form, so keep it private.

2. Create the webhook in Marketo

In Marketo go to **Admin → Webhooks → New Webhook** and fill in:

SETTING	VALUE
URL	The URL you copied
Request Type	`POST`
Template	The Template you copied. Change `"body"` to your message, using Marketo tokens such as `{{lead.First Name}}`.

SETTING	VALUE
Request Token Encoding	`None`
Response type	`JSON`
Custom header	`Content-type` : `application/json`

3. Call it from a Smart Campaign

Create a Smart Campaign (**Marketing Activities → New → New Smart Campaign**). On the **Smart List** tab add the trigger you want—for example **Data Value Changes** on **Mobile Phone Number**. On the **Flow** tab add **Call Webhook** and choose your webhook. On the **Schedule** tab, click **Activate**. While testing, set the qualification rules to **every time** so a lead can receive more than one message.

Optional URL settings

Add these to the end of the webhook URL to change how the SMS is sent:

ADD TO THE URL	EFFECT
`&sender_address=MyBrand`	Sends from this sender ID or phone number. Without it, messages are sent from a repliable number. The `"from"` part of the Template is ignored.
`&country_code=44`	Country code for numbers without one. Without it, your **Default Country Code** is used.
`&marketing_code=SUMMERSALE`	Added for you when you enter a Marketing Code on the Webhook-Info page.

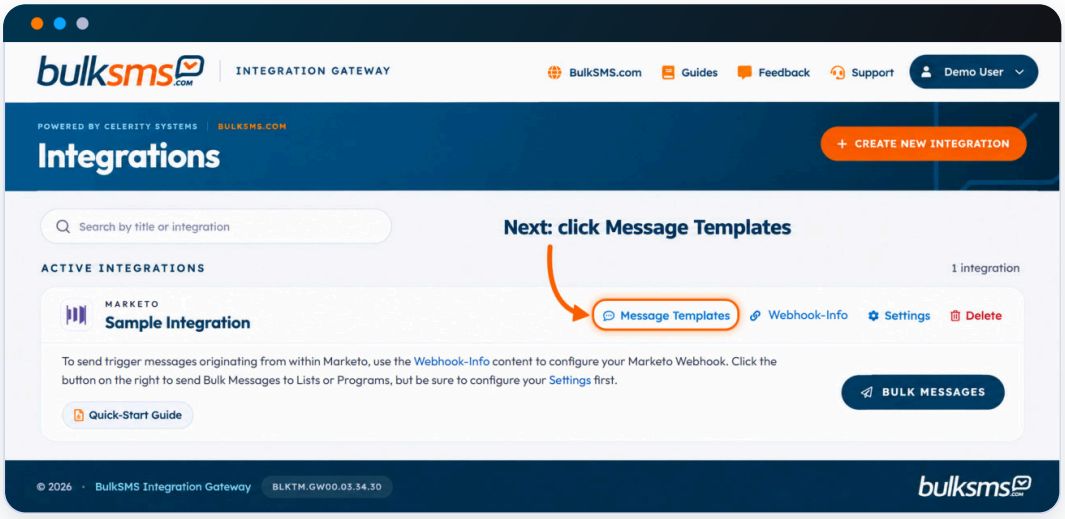
Webhook messages use Marketo's own `{{lead.…}}` tokens, which Marketo fills in before calling the webhook. Message templates and `[[smart tokens]]` are for bulk messages only. **Force Country Code** doesn't apply to webhook messages—numbers that still start with 0 are rejected.

If your BulkSMS password changes, copy the Template from Webhook-Info again and update the webhook in Marketo. If your account requires an API token, replace the `"id"` and `"secret"` in the Template with your token's ID and secret.

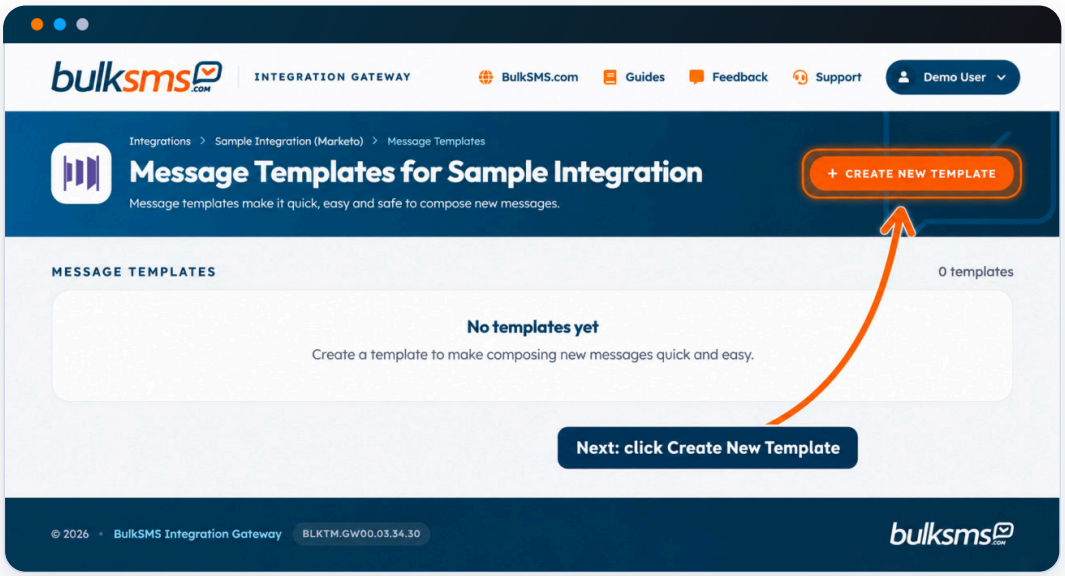
06 Message Templates

Templates let you save bulk messages you send often, with tokens that personalise each message for the lead.

1 On the Integrations page, click **Message Templates** for your integration.

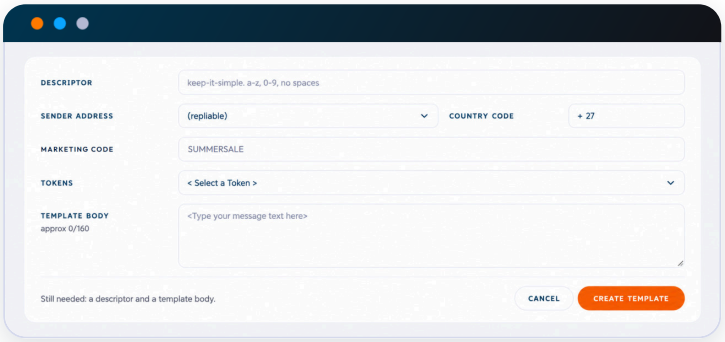


2 Click **Create New Template**.

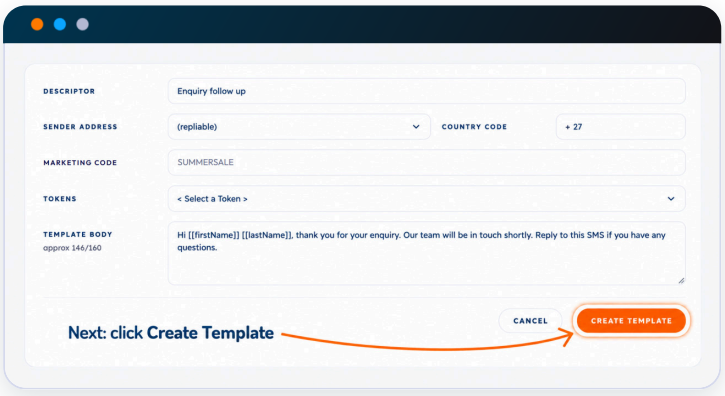


3 Fill in the template:

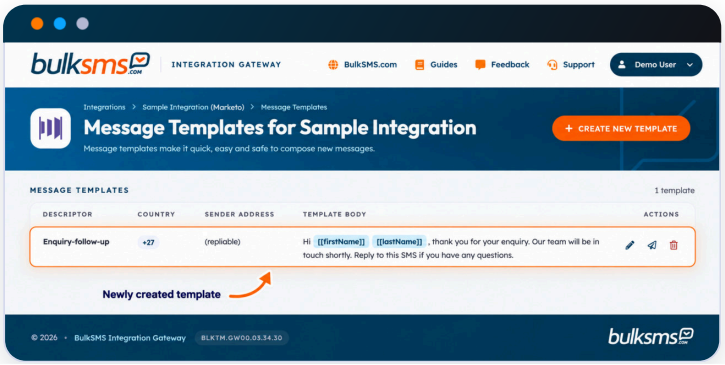
- **Descriptor** – a name for the template, using letters, numbers, spaces and hyphens.
- **Sender Address** – keep **(repliable)** if you want leads to be able to reply.
- **Country Code** – the default for this template. You can change it when you prepare a message.
- **Marketing Code** – optional, saved in capitals. It is filled in for you when you send this template to a Marketo Program.
- **Tokens** – pick a lead field to insert it into the message. See Sending Tips.
- **Template Body** – your message. The counter shows the approximate length against 160 characters.



4 When the template is complete, click **Create Template**.



5 Your new template is listed under **Message Templates**. Use the icons on the right to **edit** it, **prepare a bulk message** from it, or **delete** it.

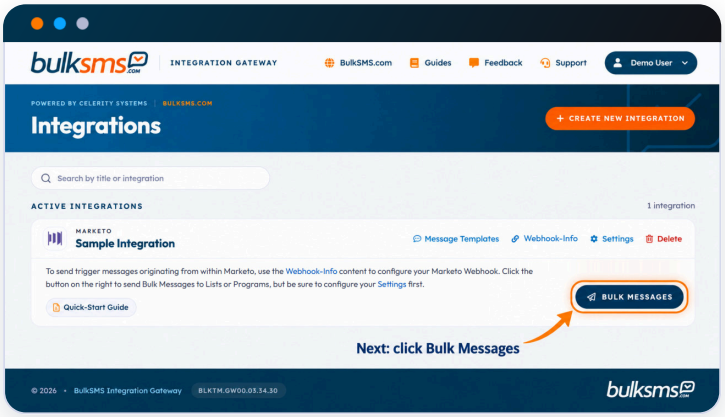


07 Bulk Messaging

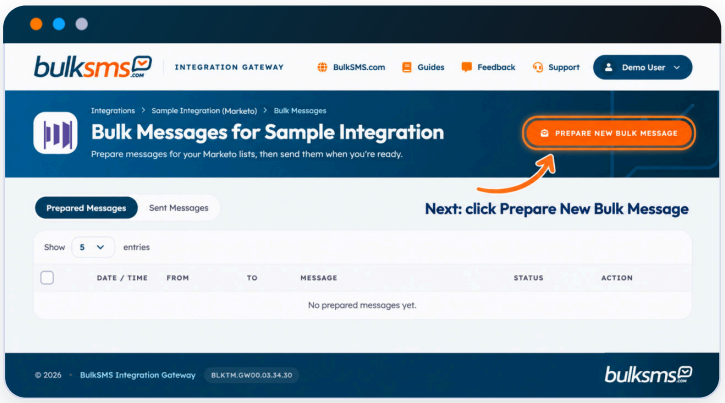
Send an SMS to every lead in a Marketo list or program—even very large ones of up to a million leads. You prepare the message first, check a sample, then send it.

Prepare the message

1 On the Integrations page, click **Bulk Messages** for your integration.

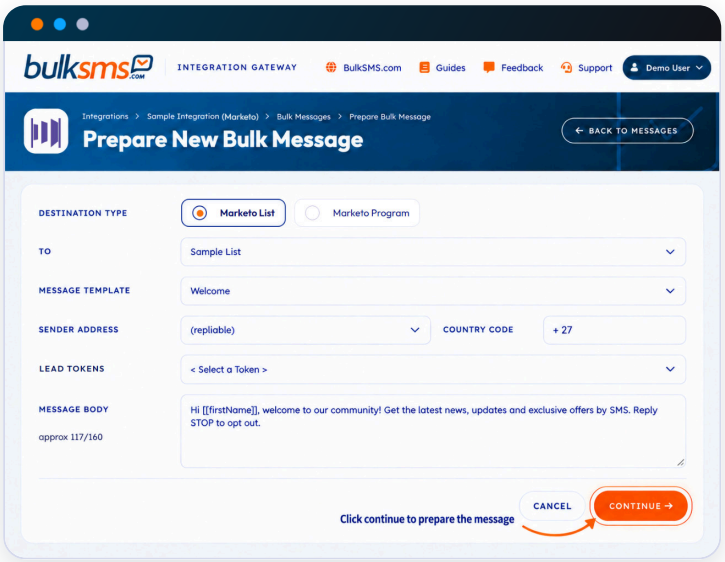


2 Click **Prepare New Bulk Message**.

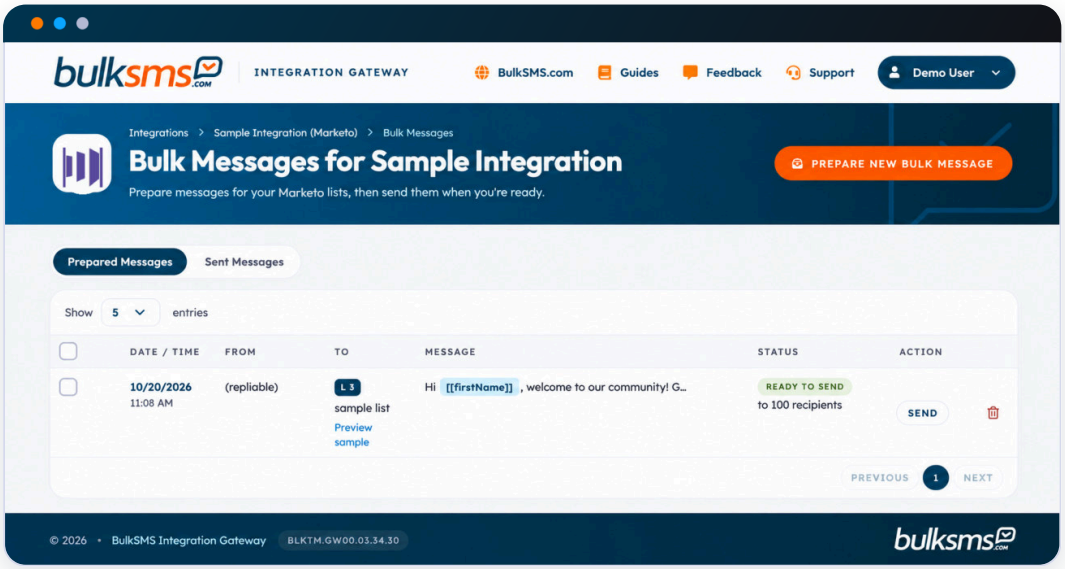


3 Fill in the form, then click **Continue**:

- **Destination Type** – **Marketo List** (a static list) or **Marketo Program**, then choose it under **To**. Type in the search box to find it.
- **Progression Status** and **Marketing Code** – programs only. Choose **All** or one program status, and optionally a code for the SMS activities.
- **Message Template** – optional. Choosing one fills in the message, sender and country code, and you can still edit them.
- **Sender Address** and **Country Code** – as for templates.
- **Lead Tokens** and **Message Body** – write or adjust the message, adding tokens as needed.

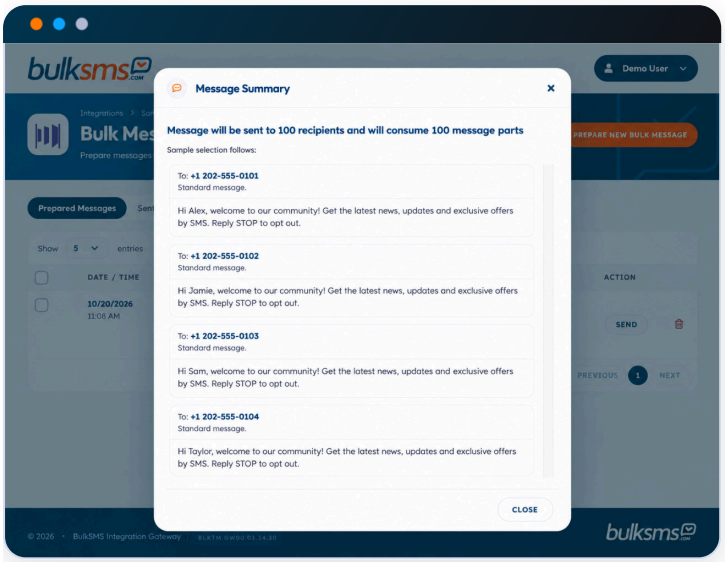


4 The integration collects your leads and lists the message under **Prepared Messages**. When it shows **Ready to Send** you can preview it, send it, or delete it with the bin icon.

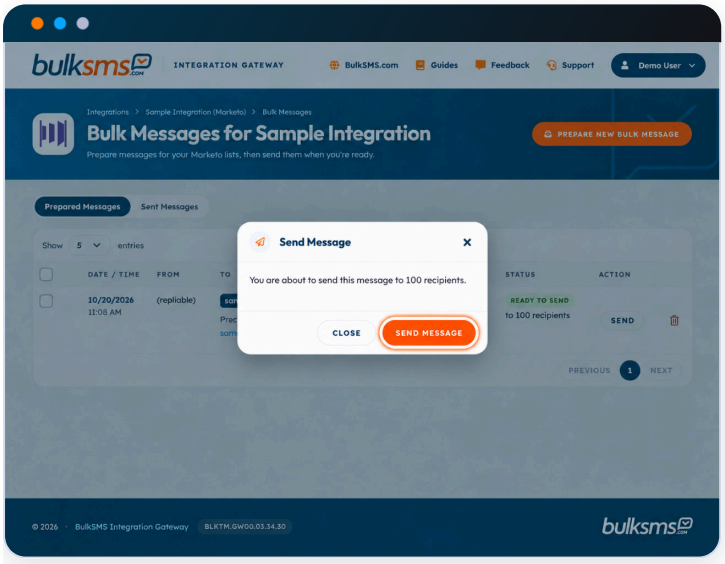


Preview and send

Click **Preview sample** to see how the message looks for a sample of up to 100 leads, with each lead's tokens filled in. The summary also shows how many recipients and message parts the send will use.

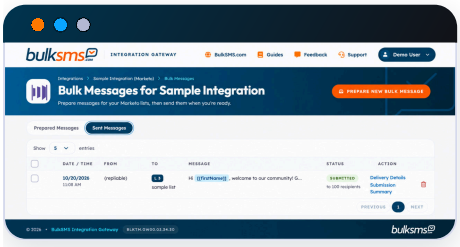


When you're happy, click **Send** and confirm with **Send Message**.



Track your message

Sent messages move to the **Sent Messages** tab. Click **Delivery Details** to see what happened to each message, or **Submission Summary** for totals, including any leads that were skipped.



08 Sending Tips

Who receives a bulk message

- **Marketo List:** every lead in the static list. **Marketo Program:** every program member, or only those with the chosen **Progression Status**.
- The message goes to the lead's **Mobile Phone Number**. Leads without one are skipped—the Phone Number field isn't used.
- Marketo's unsubscribe status isn't checked, so keep your SMS lists clean. Duplicates aren't removed: two leads sharing a number will both be messaged.

Phone numbers and country codes

Numbers are sent in international format, and spaces, brackets and dashes are removed. If a number doesn't include a country code, the integration adds the country code from the message. **Force Country Code** on the Settings page changes when it is added. With a country code of 44:

NUMBER IN MARKETO	FORCE COUNTRY CODE OFF	FORCE COUNTRY CODE ON
`07700 900123`	`447700900123`	`447700900123`
`7700900123`	`7700900123` (not valid)	`447700900123`
`12025550143`	`12025550143`	`4412025550143` (wrong)
`+1 202 555 0143` or `0012025550143`	`12025550143`	`12025550143`

The safest option is to store numbers in Marketo with a **+** and the country code (e.g. +44 7700 900123). Only turn on Force Country Code if all your leads are in one country and their numbers are saved without a country code.

Message length

- One SMS holds up to **160 characters**, or **70** if the message contains Unicode characters such as emoji or some accented letters.
- Longer messages are sent in several parts, and each part uses credits. The Prepare screen shows an approximate character count and a **Long Message** warning with the number of parts.
- A message can't be sent if it reaches 10 parts or more—the **Continue** button stays disabled until you shorten it.

Tokens

Bulk message tokens use the lead field's API name in double square brackets. Pick them from the **Lead Tokens** list—it is grouped into Information, Billing and Company fields. Commonly used tokens:

TOKEN	INSERTS	TOKEN	INSERTS
`[[firstName]]`	First Name	`[[company]]`	Company
`[[lastName]]`	Last Name	`[[title]]`	Job Title
`[[salutation]]`	Salutation	`[[city]]`	City
`[[email]]`	Email Address	`[[mobilePhone]]`	Mobile Phone

If a lead has no value for a token, the lead is skipped (First Name and Last Name are simply left blank). Smart token options let you control this:

OPTION	EXAMPLE	EFFECT
`:default=`	`Hi [[firstName:default=friend]]`	Uses "friend" when the lead has no first name.
`:if(>n)`	`[[firstName:default=friend:if(>5)]]`	Uses the default if the value is longer than 5 characters: Sara stays "Sara", Annabel becomes "friend".
`:if(unicode)`	`[[firstName:default=friend:if(unicode)]]`	Uses the default if the value contains Unicode characters, so the message stays at 160 characters per part.
Both	`[[firstName:default=friend:if(unicode):if(>5)]]`	Uses the default if either condition is met.

Always give `:default=` a value—an empty default inserts the word "null".

Sender address

- **(repliable)** – leads can reply, and replies come back to Marketo.
- **A phone number** – leads can reply to that number.
- **A name** (e.g. your brand) – leads **can't reply**.

> **Opt-outs:** the Integration Gateway doesn't unsubscribe leads who reply STOP, and bulk messages don't check Marketo's unsubscribe status. Handle opt-outs in Marketo—for example with a Smart Campaign on the **Reply SMS** trigger that removes leads from your SMS lists when they reply "STOP".

09 Troubleshooting

YOU SEE	WHAT TO DO
“Please complete all Connection fields, then try again.”	Fill in the Client ID, Client Secret, REST API Endpoint and REST Identity Endpoint.
“REST endpoint doesn’t match permitted domains. Please correct, then try again.”	The REST Identity Endpoint must be a Marketo address, e.g. `https://123-ABC-456.mktorest.com/identity`.
“Please enter a valid endpoint URL and try again.”	The REST API Endpoint must end in `.mktorest.com/rest`.
“Marketo authentication failed …” or “CRM Authentication failure …”	Check the Client ID, Client Secret and REST Identity Endpoint with your Marketo administrator, then click Test Connection again.
“Failed to create/retreive acitities in Marketo.” (on Save)	The API user can’t create the SMS activity types. Ask your Marketo administrator to check the API role’s permissions, then save again.
Error 603 when preparing a message	Marketo denied access. Give the API role the ‘Read-Only Activity’ or ‘Read-Write Activity’ permission (and access to your workspaces).
Delivery status or replies don’t reach the lead	Check Activity Updates is Enabled, the custom fields exist with the exact API names, and webhook URLs include `lead_id={{lead.ID}}`.
Webhook response: “Null or invalid HTTP POST content …”	The webhook Template isn’t valid JSON or is missing `"to"` or `"body"`. Paste it again from Webhook-Info.
Webhook response: “Mobile number starts with zero, but should start with a country code …”	Add `&country_code=` to the URL or set a Default Country Code, or store the number with its country code.
Webhook response: “Password authentication failed.”, “Token authentication failed.” or “Valid API Token is required …”	Copy the Template from Webhook-Info again. If your account requires an API token, put the token’s ID and secret in the Template’s `"authentication"`.
Leads skipped: “MSISDN is invalid” or “Missing data for … token.”	The lead has no valid Mobile Phone Number, or no value for a token—add a default, e.g. `[[company:default=your company]]`. You can download the skipped leads, with the reason for each, from the Prepared Messages table.
“Message contains the following invalid token: …”	Pick tokens from the Lead Tokens list. Marketo-style tokens such as `[[lead.First Name]]` aren’t accepted—use `[[firstName]]`.
Continue is greyed out	Choose a destination type and a list or program, and check the message is under 10 parts.

Questions

We're here to help you every step of the way.

Please email **support@bulksms.com** or visit **www.bulksms.com** for other contact options.

Please be sure to mention **your username** and that you are using the **Integration Gateway for a Marketo integration**.

EMAIL SUPPORT

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