



THE BULKSMS INTEGRATION GUIDE

for 
Marketo[®]



— GET YOUR MESSAGE ACROSS —



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Introduction

BASIC INTEGRATION

The BulkSMS Gateway for Marketo was designed for advanced SMS integration between Marketo and BulkSMS. This guide covers the basic integration steps, and should be sufficient for most common SMS messaging needs.

Some of the topics are mentioned below. Contact support@bulksms.com if you need more information, and please mention your specific requirements so that the request can be allocated to the correct person / team.

ADVANCED INTEGRATION

Advanced Integration options include;

- *Schedule message for later delivery (up to 1 year in advance)*
- *True bulk messaging with up to 30,000 SMS's being sent in a single submission*
- *Customizable sender ID – like your brand or company name or alternate reply number.*
- *Message concatenation. Send messages up to 1500 characters in length.*
- *Incoming long numbers – for mobile originated messaging.*

Use any or all of our other products and tools from the same BulkSMS account.

You can use any or all of our products from the same BulkSMS account, or you can create multiple accounts for different use cases or internal departments. You can also easily transfer credits between accounts or have a primary (parent) account that sponsors multiple sub accounts.

OUR OTHER PRODUCTS INCLUDE;

- *Desktop Messenger for Windows and Apple Mac*
- *Salesforce Messenger*
- *JSON REST API*
- *Web Interface*
- *iOS App*
- *E-mail to SMS*

Many of our clients use multiple products to cover all their SMS messaging needs.

THE DESKTOP MESSENGER:

The Desktop Messengers are very user friendly and they are particularly useful for ad-hoc messaging. The Desktop Messenger for Windows is also able to send to large or huge groups, and has the ability to link to or reference external ODBC data-sources, such as SQL Server, Excel, MS Access, My Sql and many other proprietary products that share data via ODBC.

The iOS App runs on most modern iPhone and iPads. It allows you to send to online groups that can contain as many as 10,000 contacts per group.

Please visit www.bulksms.com/products for more.





Intergrating BulkSMS to Marketo.

STEP ONE

– Register with BulkSMS.com

Go to www.bulkSMS.com and register a new account.

After successful sign-up, you should have a few test credits in your account.

Please send an e-mail to support@bulkSMS.com with the following information:

Subject Line: Marketo Integration Request

And then include the following in the body of the mail

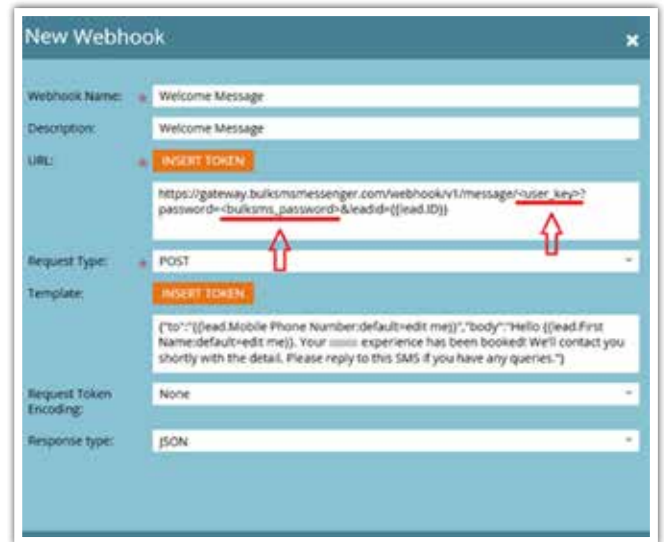
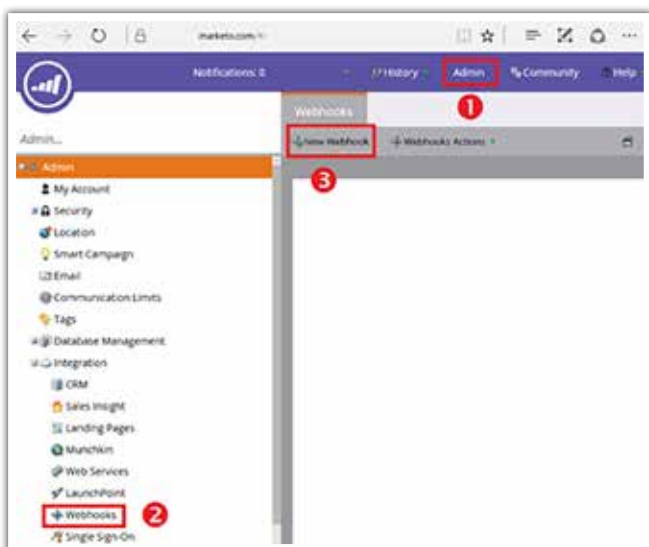
- The name of your Company
- Your BulkSMS username (this is case sensitive)

We will then load some additional free test credits to your account and reply to your mail with a unique <user_key> (to be used later).

STEP TWO

– Create a Webhook that connects to BulkSMS

From within Marketo, go to the Admin, Integration, Webhooks, and create a New Webhook.



Enter the Webhook details as shown in the screen above.

Copy and paste this URL:

`https://gateway.bulkSMSmessenger.com/webhook/v1/message/<user_key>?password=<bulkSMS_password>&leadid={{lead.ID}}`

Replace the <user_key> token with the User Key that was e-mailed to you as part of your BulkSMS Registration and support@bulkSMS.com request. This user key is typically 36 character in length and is in the format xxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxx. Replace the <bulkSMS_password> token with the password that you selected when you registered your BulkSMS account in STEP 1.

Do not include the < angle brackets >.

TEMPLATE:

You can copy and paste this. Modify and change your message as you feel necessary.

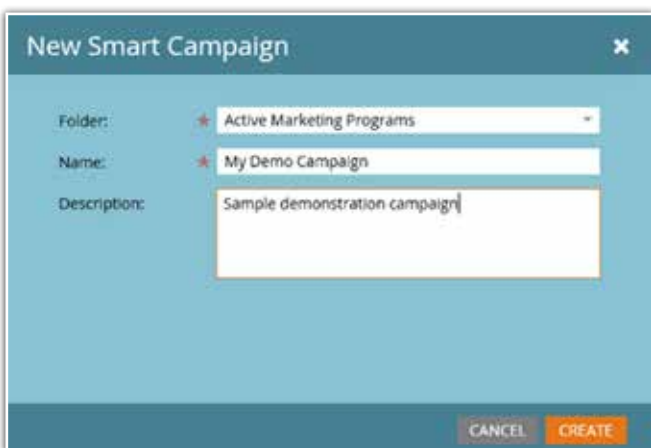
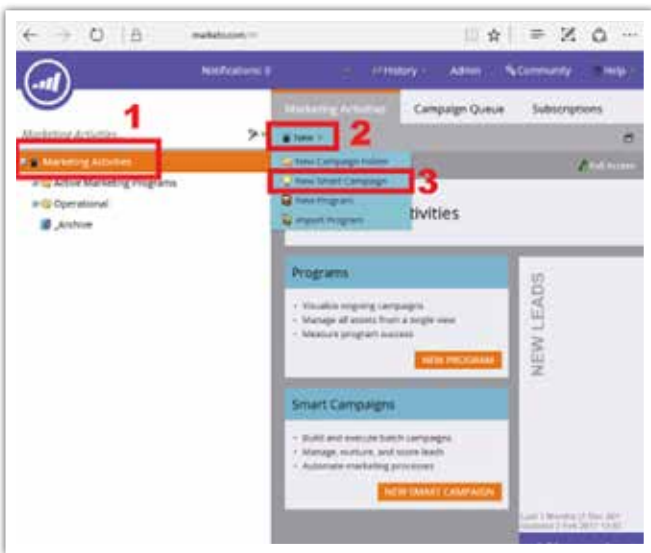
```
{ "to": "{{lead.Mobile Phone Number:default=edit me}}", "body": "Hello {{lead.First Name:default=edit me}}. Your experience has been booked! We'll contact you shortly with the detail. Please reply to this SMS if you have any queries." }
```

STEP 3

– Create a trigger to Send an SMS

There are many ways to create a trigger to send an SMS. The following is just one example. You should implement what works best in your business.

- i.* From the main Marketo options menu, click Marketing Activities, New, New Smart Campaign



- ii.* Just enter some basic descriptive information. The Folder is selected from a drop-down list of available folders.

- iii.* Click the Create button to continue.
- iv.* Select the Smart List option.
- v.* Create the Smart List
- vi.* Drag the 'Data Value Changes' item from the list on the right and drop it into the main work area. That should create a 'Data Value Changes' process box. Select the 'Mobile Phone Number' item from the 'Attribute' list.
- vii.* When done, click the 'Flow' tab to continue.

CONFIGURE THE FLOW

- i.* Drag the 'Call Webhook' item from the list on the right, and drop it into the main work area.
- ii.* Next, click the 'Webhook' drop-down list, and select the Webhook you created in STEP 2.
- iii.* When ready, click Schedule tab to continue.

SCHEDULE THE TRIGGER

This is an optional setting. By default, the Lead will only be included once in the campaign, so because we're testing and likely to want to send multiple messages, you can optionally change the trigger option from 'only once' to every time'.

The campaign will not work until activated. Click the 'Activate' button to activate the campaign.

BASIC TESTING

Now that you've done the configuration, it's easy to run a test or two. Follow these steps;

- i.* Create a new Lead
- ii.* Edit the Lead and add a mobile to the Mobile: field
- iii.* The Lead should be auto-saved after you move to the next field or another part of the screen. This should trigger the webhook to be called, which in turn should result in message being sent to the designated mobile phone.

DIAGNOSTICS & ADDITIONAL REPORTING

If you followed the steps on the previous pages, then the SMS's should be delivered to the designated mobile phones when the associated Webhooks are triggered. If the SMS's are not being delivered, then there are a few things to check.

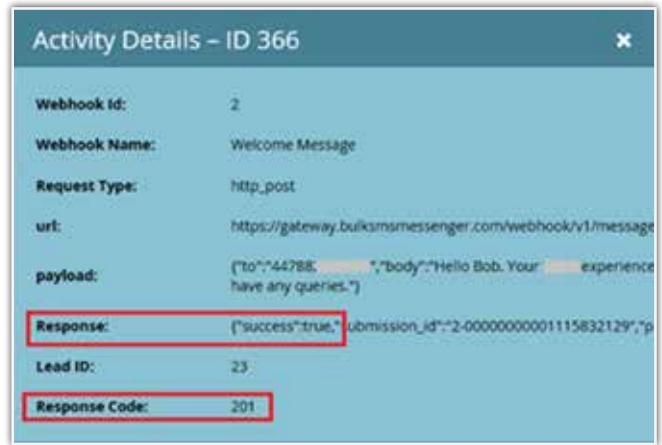
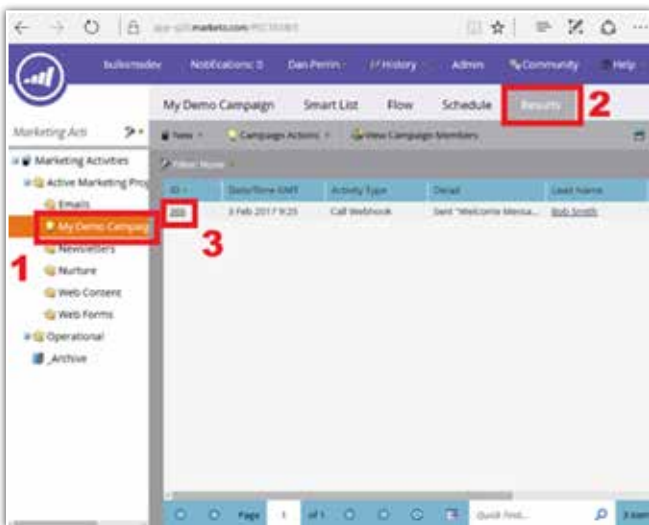
CHECK THE BASICS

The obvious first steps are to ensure that;

- » you have a valid BulkSMS account with credits
- » you've correctly entered the <user_key> in the Webhook configuration screen, and entered the correct case sensitive password.
- » The mobile number is valid and begins with a country code. Eg 4412345678 (for the UK), or 112345678 (for the US) etc.
- » The campaign has been Activated
- » Qualification Rules set to 'Every time' – see page 15

CHECK THE MARKETO CONFIGURATION

If those items checkout, then you can look at the Marketo campaign Results screen. The Results screen will provide you with activity history. If no activity, then it means the Webhook is not being triggered. If there is activity, then view the detail to determine if the message was sent. See the following screen shots.



The Activity Details screen will show if the message was sent, as well as any success or error messages / codes. For assistance, please contact support@bulksms.com

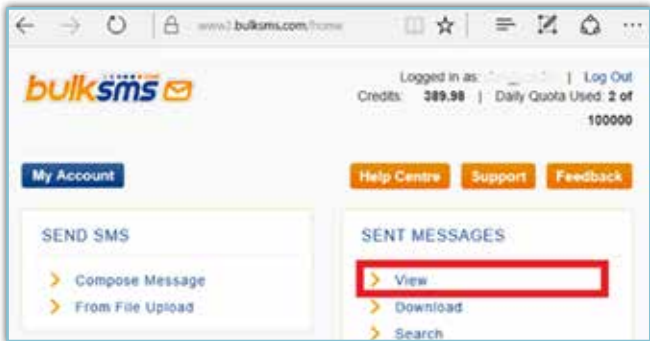
TYPICAL RESPONSE CODE

The only valid response is 201 (meaning CREATED). Any other code will typically be an error. See the table below for guidance. Contact support@bulksms.com if you need assistance.

Code	Meaning	Reason
400	Bad Request	Something in the request is invalid.
403	Forbidden	The request indicated an action that is not allowed.
422	Unprocessable Entity	The request entity is invalid
429	Throttled	http://tools.ietf.org/search/rfc6585
500	Internal Server Error	Something unrelated to the request is broken.
503	Service Unavailable	The server is refusing to handle your request. You would normally only see this status as part of a throttled response, but it may appear in other cases.

CHECK THE BULKSMS CONFIGURATION

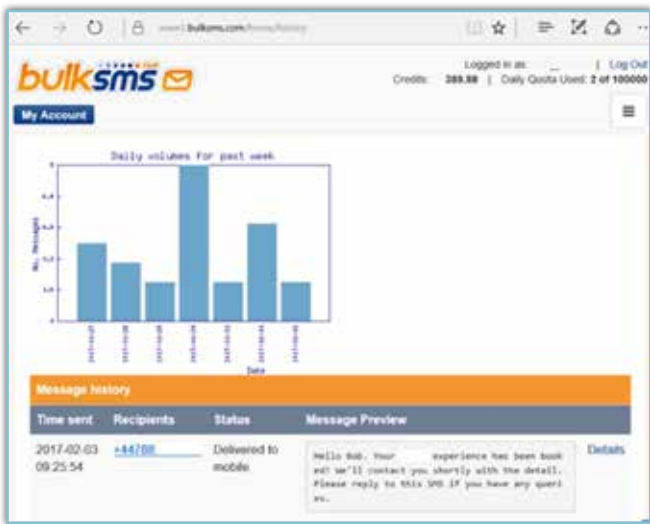
If the response code in the activity detail screen is 201, then it means that the message was sent to and accepted by BulkSMS. So, to investigate further, log in to your BulkSMS account at www.bulksms.com and click on the 'View' item in the 'SENT MESSAGES' area.



Reply messages and status reports can be sent back to Marketo in real time.

If you are interested in having reply messages and delivery status updates sent back to Marketo, then you can continue with the optional configuration in the next section.

STEP 4 - Update Marketo Leads using callbacks (optional)



ABOUT CALLBACKS

This step is optional. Callbacks are used to push BulkSMS reply messages and status updates to Marketo, thereby updating the Lead record that was originally associated with the outgoing SMS.

DELIVERY STATUS UPDATES

So for example, if an SMS is successfully sent to a Lead, then the delivery status of that SMS can be written back to a custom field on the Lead as proof that the message was delivered, or a failure message if unsuccessful.

REPLY OR MOBILE ORIGINATED (MO) MESSAGES

Similarly, if the recipient of the SMS sends a reply SMS, then that reply can also be written to a custom field on the Lead record.

Any sent messages will be displayed in the Message history page, along with delivery a delivery status. The delivery status is descriptive and should help diagnose any delivery issues.

You can then of course create other triggers to perform another action in the workflow in response to such updates.

FURTHER DEVELOPMENT

EXTEND THE SAMPLE

The steps in this guide were created to get you started with a basic messaging sample. This sample can be extended for much more sophisticated use cases.

Messages are 2-way. Recipients can reply to SMS messages and these replies will be accessible from your BulkSMS Inbox. You can view your Inbox messages using any of our products, like the Web Site, via our API, or using the Desktop Messengers for Windows or Apple Mac, or the iOS App. Visit www.bulksms.com/products to for more information.

MARKETO CONFIGURATION

To configure these callbacks, you need to obtain Marketo API credentials so that BulkSMS can make authenticated calls to your instance. The steps for this can be found here:

<http://developers.marketo.com/rest-api/>

At the end of the configuration process, you should have the following information to hand.

- » **Marketo client ID**
- » **Marketo client secret**
- » **REST endpoint**
- » **REST identity endpoint**



Please send this information to support@bulksms.com with the subject line Marketo / BulkSMS callback. Please also remember to mention your username. You can copy/paste the template below into a new empty e-mail message. Remember to include all the required information.

To: support@bulksms.com

Subject: Marketo /BulkSMS callback

Message Body: Hello BulkSMS support team. Please update my Marketo configuration with the following information.

- » Username
- » <User_key>
- » Marketo client ID
- » Marketo client secret
- » REST endpoint
- » REST identity endpoint

CREATE CUSTOM FIELDS ON LEAD OBJECT

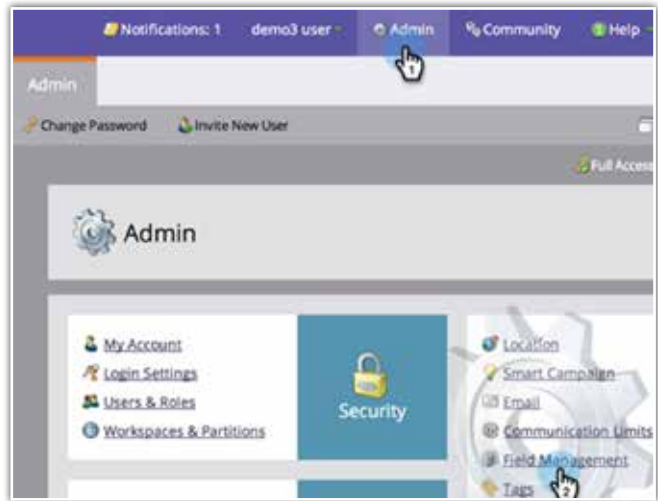
The next step is to create two custom fields on the Lead object. These will be used to store the delivery status and reply message.

The field must be named as follows and names are case sensitive.

Field Name	API Name
SMS Delivery Status	sms_delivery_status
SMS Reply	sms_reply

For instructions on how to create custom fields, simply follow these detailed steps in the Marketo Blog. Steps 1 to 5 are relevant to this integration. The steps have been copied and included below for your convenience.

<http://developers.marketo.com/blog/create-a-custom-field-in-marketo-and-update-this-field-via-api/>



i. Under Admin, click on Field Management.



ii. Click the New Custom Field button.



iii. Choose the field Type. This will change how it is rendered in Smart Lists and Forms in Marketo.

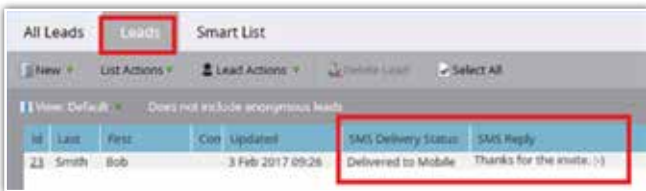


iv. Enter the Name as you want it to appear in Marketo.

In this case, you should be naming the field as 'SMS Delivery Status' as described in Table 2 on page 25. Repeat these steps for the 'SMS Reply' field.

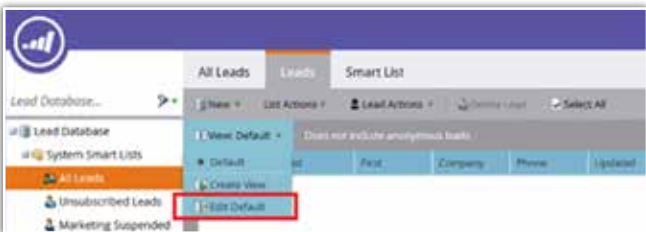
CUSTOMIZE THE LEAD VIEW TO SHOW THE NEW CUSTOM FIELDS

Once the new fields have been created, it would be useful to add them to the Leads view. That way, it's easy to see the delivery status and any reply message at a glance.



TO ADD THE CUSTOM FIELDS, FOLLOW THESE NEXT EASY STEPS.

You can either Edit the Default view or optionally create a new View.

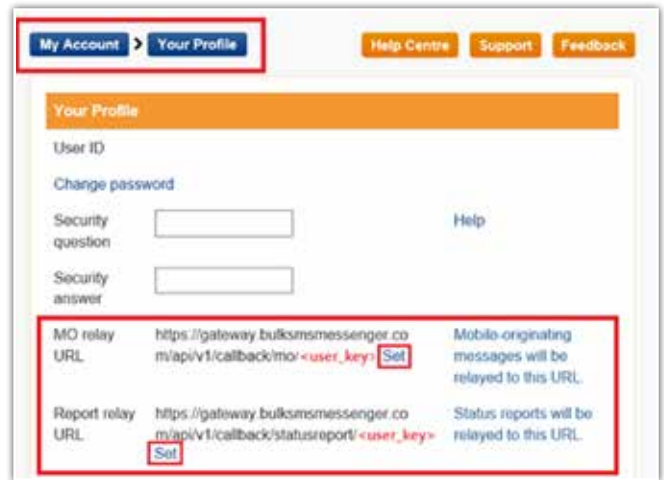


Select the fields you want by adding moving columns from the Hidden Columns table to the Visible Columns table.



CONFIGURE BULKSMS CALLBACK URL'S

The final step is to activate callbacks on the BulkSMS system. The BulkSMS support team would most likely already have completed this step for you, but the procedures are listed in any event in case you need to make changes at a later stage. Log in to your BulkSMS account at www.bulksms.com, then select 'Your Profile'.



Set the relay URL fields. You can copy and paste the template values below.

Field	Value
MO Relay	<a href="https://gateway.bulksmsmessenger.com/api/v1/callback/mo/<user_key>">https://gateway.bulksmsmessenger.com/api/v1/callback/mo/<user_key>
Report Relay	<a href="https://gateway.bulksmsmessenger.com/api/v1/callback/statusreport/<user_key>">https://gateway.bulksmsmessenger.com/api/v1/callback/statusreport/<user_key>

SUMMARY

This concludes the basic integration steps. These procedures are all very quick and effortless and you can be up and sending messages within an hour.

If you need assistance or have question, please send an e-mail to support@bulksms.com.

We will general respond within the hour, but may take longer during busy periods or after hours. Alternatively, please visit the Contact page on our website for additional contact details.