A Quick Start Guide
For Marketo Integration
With BulkSMS.com

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An Adobe Company

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Getting Started, 3 Easy Steps

1. Sign up at **https://www.bulksms.com**

2. Create a new Marketo Integration at **https://bulksms.com/integration-gateway/**

3. Go to Marketo and start sending messages in minutes.

A bit more detail...

1. Sign up at **https://www.bulksms.com**

   Once you've created your account you should have a few free test credits available. If you need additional free test credits, then please contact our support team with the following information.

   To: support@bulksms.com
   Subject: Marketo Integration – test credits required
   Please include the following:
   • The name of your Company
   • Your BulkSMS username (this is case sensitive)

2. Create a new Marketo Integration at **https://bulksms.com/integration-gateway/**

   You can create a new Marketo Integration in just a few clicks. Once created, simply go to the Webhook-Info page and copy the prepared content for pasting into your Marketo Webhook.

3. Sign in at Marketo and start sending messages in minutes. Navigate to the Admin section to create a new Webhook.

   Simply past the URL: and Template: fields with the information copied from Step 2 above. Once done, create a campaign that triggers the Webhook when required.

Advanced Integration (optional)

The basic integration steps mentioned above can be used to send Webhook triggered messages from within Marketo. You can optionally configure an advanced integration which will provide additional benefits and features. **Features include:**

• Smart [[tokens]]
• Message templates
• Advanced number clean-up and auto format
• Bulk high-speed messages to very large lists or programs
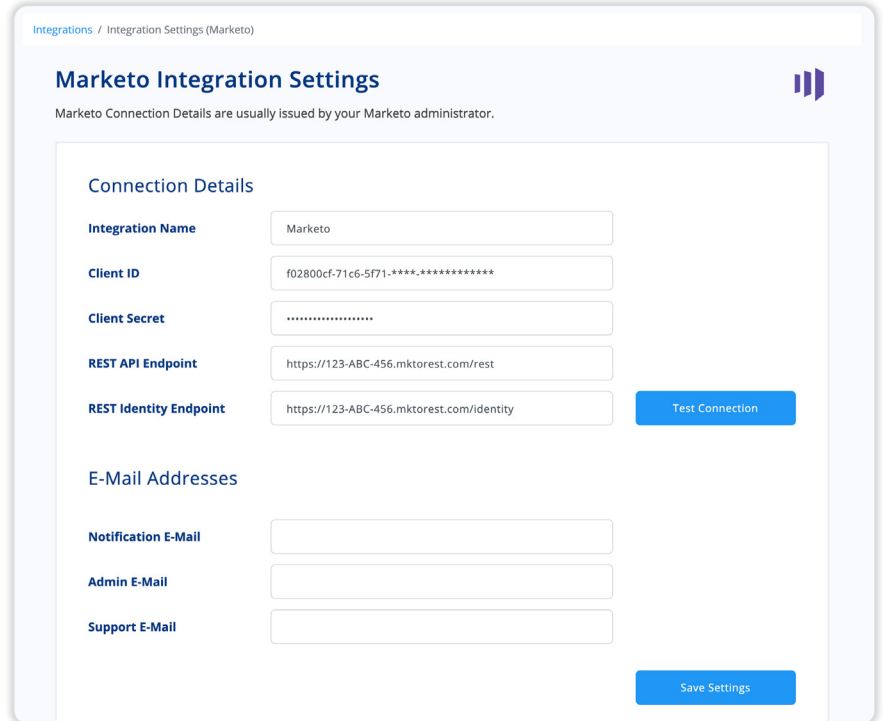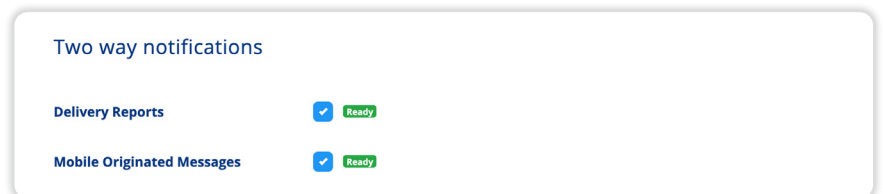• Reply messages and delivery reports pushed back to Marketo

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Configure Advanced Integration

1. Provide additional Connection Details in the Integration Settings screen:

Integrations / Integration Settings (Marketo)

Marketo Integration Settings

Marketo Connection Details are usually issued by your Marketo administrator.

Connection Details

Integration Name	Marketo
Client ID	f02800cf-71c6-5f71-****-************
Client Secret	....
REST API Endpoint	https://123-ABC-456.mktorest.com/rest
REST Identity Endpoint	https://123-ABC-456.mktorest.com/identity

Test Connection

E-Mail Addresses

Notification E-Mail	
Admin E-Mail	
Support E-Mail	

Save Settings

2. Scroll down in the settings screen and enable two way notifications.

Two way notifications

Delivery Reports	✓	Ready
Mobile Originated Messages	✓	Ready

3. Create three custom fields on the Marketo Lead object.

Field Name	API Name
SMS Delivery Status	`sms_delivery_status`
SMS Reply	`sms_reply`
SMS Program Id	`sms_programid`

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4. You can also enable Activity updates in the settings screen. There are three types of updates available, with each activity type configurable to allow you control over the amount of information included.

Enabled	✓ Ready
Sent Messages	Include body
Status Updates	Include body
	Disabled
	✓ Include body
Reply Messages	Exclude body

5. Activity Types and when they are created.

Sent Messages	`These are created when a message is successfully submitted.`
Status Updates	`These are created when Delivery or Failure reports are received.`
Reply Messages	`These are created when replies to your messages are received.`

6. An example activity in Marketo

Activity Details – ID 4592013 ✕

Source Type:	Marketo List
Lead ID:	1223522
Message Text:	Hello there Richard, You asked us to contact you when we're next in the area - we can see you anytime next week. To book a slot with one of our Sales Reps, just reply to this message and we'll get back to ASAP.
Message ID:	BMR-231701
Source:	Single Number
Marketing Code:	

CLOSE

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Advanced Features Explained

Smart [[tokens]]

Smart tokens are general tokens that include rules and logic that controls how token fields are translated when merged with real data. This is useful f you want to control message length, deal with empty fields, or manage fields that might contain Unicode characters. See the Smart Token Appendix at the end of this document for more information.

Message Templates

You can create as many templates as required. Temples allow you to specify message text and attributes, such as the default country code and sender ID or reply options.

Advanced Number Clean-up & Auto Format

Messages can only be delivered when presented in International format, starting with the country telephone dial code. For example: 1 for the US, 44 for the UK etc. Your Mobile number field might not contain well formatted numbers. The CRM Gateway will automatically clean-up and format badly formatted numbers. Some examples follow.

Number field as found in Marketo	After processing by CRM Gateway
1 (234) 567-890	1234567890
(0234) 567-890	1234567890
+1 (234) 5 6 7 8 9 0 abc	1234567890

Bulk High-Speed Messages to Very Large Lists

Individual triggered messages are fine for smaller batches or when timed delivery of messages aren't critical. When sending to very large names Lists or Programs or when timing is important, then you can should consider using the Bulk Message feature of the CRM Gateway.

The bulk message feature can send to Lists or Programs that contain up to 1 million leads.

Replies & Delivery Reports Pushed Back to Marketo

Reply messages and status reports are pushed back to Marketo in the most optimal way possible.

Reply messages update the sms_reply custom field and sent message delivery reports update the sms_delivery_status custom field. Reply messages are sent to Marketo in real-time. Status reports are accumulated and sent in batches of 300 or less at scheduled intervals.

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Appendix: Smart Tokens

Smart [[tokens]]

Tokens used in Bulk Messages are specified within [[double square braces]]. These tokens can also contain attributes that changes the behaviour of the token at submission time.

For example, if you want to ensure that a message does not exceed a certain length, then you can specify a maximum length for a token, so that if the merged content for that token exceeds the specified length, then the token will use a default specified value. There is a similar attribute for Unicode characters.

In Summary, tokens can contain the following attributes.

- :default=
- :if(>n)
- :if(unicode)
- Usage examples follow.

Token Field (no attributes)

[[lead.First Name]]
Example: "Hello [[**lead.First Name**]]. How are you?"

Lead.First Name	Message
Bob	"Hello **Bob**. How are you?"

Token Field Attributes :default

:default= the default value to use if there is no merge content
Example: "Hello [[**lead.First Name:default=friend**]]. How are you?"

Lead.First Name	Message
Bob	"Hello **Bob**. How are you?"
(empty)	"Hello **friend**. How are you?"

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Token Field Attributes :if(>n)

:if(>n) - use the default value if the field length is greater than n
Example: "Hello [[**lead.First Name:**default=friend**:if(>5)**]]. How are you?"

Lead.First Name	Message
Bob	"Hello **Bob**. How are you?"
Peter	"Hello **Peter**. How are you?"
Annabel	"Hello **friend**. How are you?"

Token Field Attributes :if(unicode)

:if(unicode) - use the default value if the field contains one or more Unicode characters
Example: "Hello [[**lead.First Name:**default=friend**:if(unicode)**]]. How are you today?"

Lead.First Name	Message
Bob	"Hello **Bob**. How are you today?"
Bob 美	"Hello **friend**. How are you today?"

Token Field Attributes :if(unicode):if(>n)

:if(unicode):if(>5) - use the default value if either condition is met
Example: "Hello [[**lead.First Name:**default=friend**:if(unicode):if(n>5)**]]. How are you?"

Lead.First Name	Message
Peter	"Hello **Peter**. How are you today?"
Annabel	"Hello **friend**. How are you today?"
Bob 美	"Hello **friend**. How are you today?"

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Support & Help

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

For any support or assistance, please e-mail **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 **CRM Gateway for a Marketo Integration**.