



SalesIntel Marketo Configuration Guide

Last Updated: January 30, 2025

At the end of this guide, you should be able to export contacts from SalesIntel to Marketo, and run enrichment processes against Marketo contacts using SalesIntel enrichment capabilities. To begin, you will need to have an admin role in Marketo.

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Marketo Connector Setup

This is needed to push data from SalesIntel to Marketo (one way).

1. In the [SalesIntel web app](#), click Settings > Integrations > Marketo Settings.
2. Populate the Endpoint, Identity, Client ID, and Client Secret:
 - a. Log into your Marketo instance
 - b. Go to Admin
 - c. Under Integrations, click Web Services
 - d. Copy the Endpoint and Identity values and paste into SalesIntel
 - e. Under Integrations, click Launchpoint
 - f. Click New Service
 - g. Enter "SalesIntel" for Display Name
 - h. Select *Custom* as Service
 - i. Enter "SalesIntel Integration" as description
 - j. API only user: select the user that is configuring the settings in SalesIntel
 - k. Click Create
 - l. Click View Details
 - m. Copy and paste Client ID and Client Secret into SalesIntel configuration settings
 - n. Now click on 'test connection' in the SalesIntel Marketo Settings screen. You will see a green confirmation box if your settings are correct. If you get a red alert box, please revalidate the credentials and settings you entered.
 - o. Once successful, click Login
3. Configure the Mapping of the fields. If you do not use a field, set to Skip. **If there are any fields that you do not want SalesIntel to overwrite for an existing contact during export or enrichment, make sure Allow Overwrite is deselected.** The same setting will apply to both enrichment and export.
4. Go to Settings, set "Prompt For Lead Partitions" to off if you only have 1 partition or are unsure.
5. Click Save once done.
6. Run a test export. Perform a search in SalesIntel, select a few contacts, under Bulk Actions and click Export to Marketo. If you receive a success message the Marketo integration is successfully set up. If you receive an error, please reach out to support@salesintel.io.



Marketo Webhook Setup For Enrichment:

Prerequisites:

You must have a SalesIntel API Key. Please contact support@salesintel.io for an API key.

Create a New Webhook

1. In Marketo under Admin > Integration > Webhooks click 'New Webhook', enter these values for the new webhook, and save:

Webhook Name: SalesIntel Webhook

URL: <https://api.salesintel.io/service/enrichment/enrich/marketo/webhook/lead>

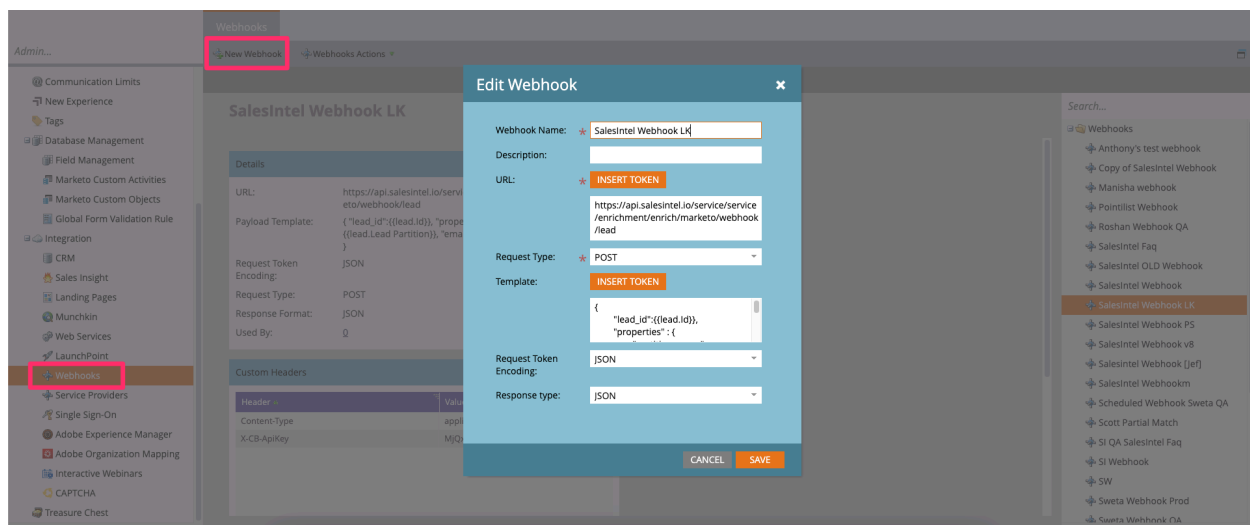
Request Type: POST

Template:

```
{
  "lead_id":{{lead.Id}},
  "properties" : {
    "partition_name":{{lead.Lead Partition}},
    "email_address":{{lead.Email Address}}
  }
}
```

Request Token Encoding: JSON

Response Type: JSON





2. Click on the webhook created under the list on the right, then click Webhook Actions > Set Custom Header, add the following header/value pairs, and save:

Header: X-CB-ApiKey / Value: Your API Token

Header: Content-Type / Value: application/json

Header	Value
X-CB-ApiKey	MjQxZTI
Content-Type	application/json

Set Up Required Custom Fields

This step is required to enrich existing Marketo contacts with SalesIntel data but has no impact on exporting new contacts.

Create four custom contact fields in Marketo. They may have any label, but the API Name and field types must match the below:

- salesintel_enriched (Boolean) (REQUIRED)
- salesintel_changed_jobs (Boolean)
- salesintel_new_email (String)
- salesintel_old_email (String)

These fields help track the changes that SalesIntel makes in your database. Every time a record is enriched, 'SalesIntel Enriched' is marked TRUE. You MUST create this contact field or enrichment will fail.



The other three fields are used to track job changes. When enrichment is requested on a contact that has gone through a job change, a new record is created and these fields are set to record the change:

- A new contact is created with the new information in the same lead partition
- 'SalesIntel Changed Jobs' set to TRUE on the old contact
- 'SalesIntel New Email' set to the new contact's email address on the old contact record
- 'SalesIntel Old Email' set to the old contact's email address on the new contact record

This process allows the Marketo admin to maintain both records as well as understand the relationship between them. Without these additional fields, enrichment will not fail, but this relationship will not be captured. The new contact record will still be created. You may use ALL fields or NONE of them, but cannot choose to use only some fields

Blocking Field Overwrites

Determine which fields can be overwritten while setting your mappings in the SalesIntel application. These mappings are referenced when writing back your data. If you do not allow overwriting, the field will be skipped when writing data back, but other fields will still be written.

Trigger Enrichment via Your Webhook

Creating a Triggered Webhook will allow you to enrich form fills and contacts as they are added into your system.

1. Create a new SmartCampaign



The 'New Smart Campaign' dialog box is shown with the following details:

- Folder: Operational
- Name: SalesIntel Webhook Trigger
- Description: Trigger webhook to append data from SalesIntel on Lead creation

Buttons: CANCEL, CREATE

2. For the SmartList, add the "Lead is Created" trigger

The 'Smart List' configuration screen shows the 'Lead is Created' trigger added to the flow. The trigger is highlighted in orange. The right-hand panel shows the 'Triggers' section with 'Lead is Created' selected.

3. For the Flow, add the Call Webhook action and select the newly created SalesIntel Webhook.

The 'Flow' configuration screen shows the 'Call Webhook' action added to the flow. The action is highlighted in purple. The right-hand panel shows the 'Integration' section with 'Call Webhook' selected. The 'Webhook' field is set to 'SalesIntel Webhook'.

4. Under Schedule, click *Activate*.



SalesIntel Webhook Trigger Smart List Flow **Schedule** Results

New Campaign Actions Edit Settings View Campaign Members

Triggered Campaign Schedule

Campaign Status: Inactive
Smart List Mode: Triggered
System Priority: Default

Smart Campaign Settings EDIT

If lead has been in this Smart Campaign before
Each lead can run through the flow once

If lead has reached the communication limits
Ignore limit

ACTIVATE

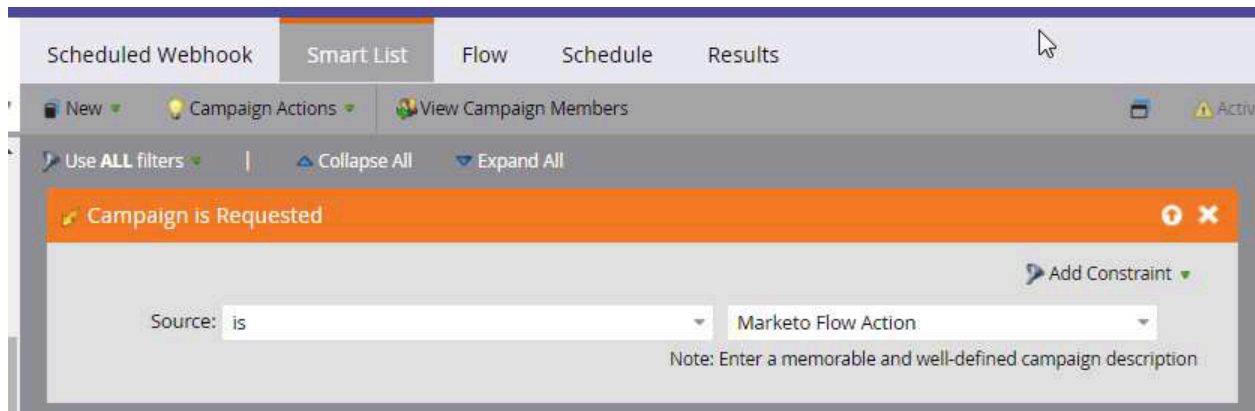
5. Test your SmartCampaign. With the triggered webhook active, add a new Email Address as a Lead to Marketo then check the *Results* tab of this SmartCampaign to confirm the webhook was called and data appended successfully.

Trigger Enrichment on a Schedule

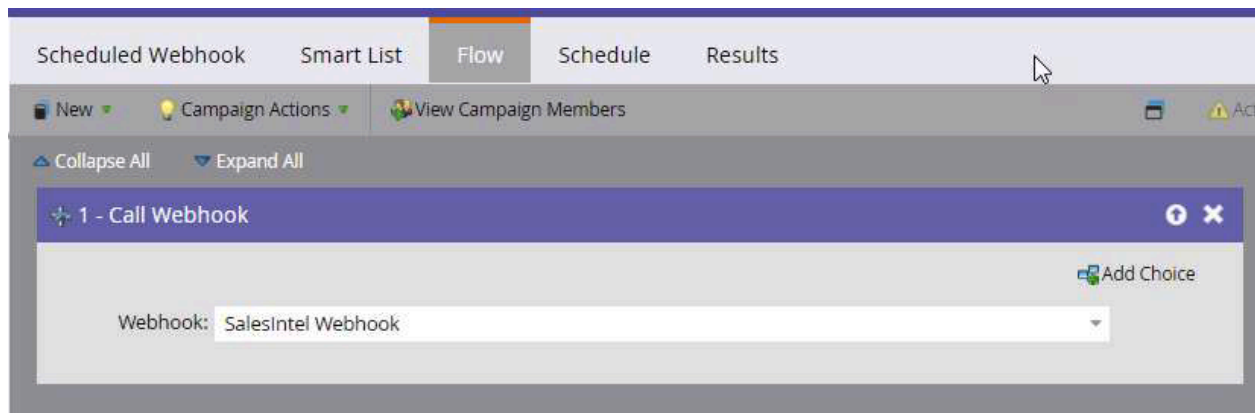
Creating a Scheduled Webhook will allow you to append specific fields that might be missing from your database.

Marketo does not support calling webhooks in bulk out-of-the-box. However, it does support calling webhooks from the 'Campaign is Requested' trigger and it does support scheduled jobs that call 'Campaign is Requested', which can then call the campaign containing the enrichment webhook.

1. Create a new SmartCampaign called "Scheduled Webhook" with the Trigger "Campaign is Requested" where the Source is "Marketo Flow Action"



2. For the Flow, add the Call Webhook action and select the newly created SalesIntel Webhook.



3. Under Schedule, click *Activate*.
4. Create a new SmartCampaign called 'Webhook Scheduler' and add over any filters that indicate the set of contacts to enrich, for example, if "Job Title" or "MobilePhone" is missing.



Webhook Scheduler | Smart List | Flow | Schedule | Results

New Campaign Actions View Campaign Members

Use Advanced filters (1 or 2 or 3) and 4 Collapse All Expand All

1 - Company Name
Company Name: is empty

2 - Job Title
Job Title: is empty

3 - First Name
First Name: is empty

4 - Email Address
Email Address: is not empty

5. For the Flow, call the "Scheduled Webhook" SmartCampaign created above.

Webhook Scheduler | Smart List | Flow | Schedule | Results

New Campaign Actions View Campaign Members

Collapse All Expand All

1 - Request Campaign
Add Choice

Requested Campaign: Scheduled Webhook

6. Schedule this campaign as appropriate.



Webhook Scheduler Smart List Flow Schedule Results

New Cap

Schedule Recurrence

Any changes made will replace the current recurrence schedule.

Schedule: Weekly

First run: 09/9/2020 10:16 AM PDT

Repeat every: 1 weeks on:

Sunday Monday Tuesday Wednesday
 Thursday Friday Saturday

End on: No end date 09/15/2020

CANCEL SAVE

7. Use the Results tab to monitor the progress of the webhook and records updated.

Trigger Enrichment Based on a Filter

SalesIntel's Marketo webhook can also be configured to run against just a sub-set of records, for example only Leads where Status = MQL and the record was updated within the last week. Creating a filtered webhook job will allow you to enrich targeted lists such as MQLs, event lists, etc.

1. To run the webhook on a schedule against a sub-set of records, first create the Scheduled Webhook Smart Campaign.



2. For the Flow, add the Call Webhook action and select the newly created SalesIntel Webhook.

3. On the Schedule tab, set this SmartCampaign to 'Active'.
4. Add additional filter criteria to the Scheduler SmartCampaign. If you only want to call the SalesIntel webhook for Leads that are MQL and were updated in the last week, for example, add over that filter criteria.



Webhook Scheduler | **Smart List** | Flow | Schedule | Results

New | Campaign Actions | View Campaign Members

Use ALL filters | Collapse All | Expand All

1 - Lead Status

Lead Status: is | MQL

2 - Updated At

Updated At: in past | 1 week

5. The Flow Step should be the same - call the Scheduled Webhook SmartCampaign.

Webhook Scheduler | Smart List | **Flow** | Schedule | Results

New | Campaign Actions | View Campaign Members

Collapse All | Expand All

1 - Request Campaign

Requested Campaign: Scheduled Webhook

Add Choice

6. Schedule this job to run in your desired time-frame.

Edit Qualification Rules

Qualification Rules determine how many times each lead can run through the Smart Campaign flow

Run each lead through the campaign flow:

- only once
- once every 1 Weeks
- every time

If lead is over communication limits

- Block non-operational emails

CANCEL SAVE



Tracking Webhook Updates

To track the effectiveness of SalesIntel's enrichment process, create a SmartList that filters on Leads where the Webhook is Called and where a Data Value that was mapped is changed.

Review the Leads from this SmartList to track records enriched with SalesIntel's webhook.

SalesIntel Enriched		Leads	Smart List			
New		List Actions	Lead Actions	Delete Lead Select All		
View: Default						
Id	Last	First	Job Title	Company	Email	Phone
208...	Tomlinson	Jennifer	Global Chann...	Microsoft Corp	jesidd@microsoft.com	
208...	Tomlinson	Jennifer	Global Chann...	Microsoft Corp	jesidd@microsoft.com	
208...	Fuertes	Narson	Senior Comp...	Apple, Inc	nfuertes@apple.com	(408) 996-...
208...	Gross	Ben	Manager, Str...	Apple, Inc	ben_gross@apple.com	(408) 996-...
208...	Fuertes	Narson	Senior Comp...	Apple, Inc	nfuertes@apple.com	
208...	Rathore	krishna	qa	Google, Inc	test@test.com	12345698...
208...	Tomlinson	Jennifer	Global Chann...	Microsoft Cor...	jesidd@microsoft.com	42570565...