

SalesIntel Marketo Configuration Guide

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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 Portal, click Welcome then Marketo Settings.

Academy Xev	Credits Renew 04/05/24					
	Need More Credits?					
	Credit Balance					
	File Center					
	Impersonate Email Submit					
	Account Settings					
ctor+	CSV Settings					
	Integration Settings					
tent search 1/19 (2)	Salesforce Settings					
tent search 1/19 (1)	Hubspot Settings					
tent search 1/19	Marketo Settings					
	Outreach Settings					
	SalesLoft Settings					
	Dynamics 365 Settings					
	Zoho Settings					
	Technographics Settings					
	News Automations					

- 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
- I. 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 <u>support@salesintel.io</u>.

Marketo Webhook Setup For Enrichment:

Prerequisites:

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

Create a New Webhook

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

Request Token Encoding: JSON Response Type: JSON

Admin	🔹 New Webhook							-
@ Communication Limits			Edit Webhook		×			
New Experience		Webbook I K						
🖫 Tags		TTONTOOK ER	Webhook Name:	* SalesIntel Webhook LK			🛙 🏐 Webhooks	
🖻 🇊 Database Management			Descriptions			П	🚸 Anthony's test webhook	
Field Management			Description.					
Marketo Custom Activities		https://ani.salesintel.io/sep/	URL:	* INSERT TOKEN			🚸 Manisha webhook	
Marketo Custom Objects		eto/webhook/lead		https://api.salesintel.io/service/service			💠 Pointilist Webhook	
📓 Global Form Validation Rule	Payload Templat	te: { "lead_id":{{lead.ld}}, "prope		/enrichment/enrich/marketo/webhook /lead			🚸 Roshan Webhook QA	
Generation		{{lead.Lead Partition}}, "ema }					🛸 SalesIntel Faq	
CRM	Request Token		Request Type:	* POST *			🚸 SalesIntel OLD Webhook	
🐇 Sales Insight	Encoding:		Template:	INSERT TOKEN			salesIntel Webhook	
Landing Pages				{				
Q Munchkin				"lead_id":{{lead.ld}},			A SalesIntel Webhook PS	
Web Services		Q		"properties" : {			SalesIntel Webhook v8	
1 LaunchPoint			Request Token	JSON ~			🚸 Salesintel Webhook (Jef)	
🚸 Webhooks		S	Encoding:				💠 SalesIntel Webhookm	
Service Providers	Header	역 Value	Response type:	JSON			- Scheduled Webhook Sweta (QA
R Single Sign-On	Content-Type	appli					💠 Scott Partial Match	
Adobe Experience Manager		MjQ>					💠 SI QA SalesIntel Faq	
Adobe Organization Mapping							🚸 SI Webhook	
iii Interactive Webinars							🐝 SW	
🚭 САРТСНА							🚸 Sweta Webhook Prod	
a Treasure Chest							📥 Sweta Webhook OA	

 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



Se	t Custom Header				×
				🔕 Remove	2
	Header %	Value			
	X-CB-ApiKey	MjQxZTI			
	Content-Type	application/json			
			C	ANCEL	SAVE

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



New Smart	Carr	npaign	×					
Folder:	*	Operational 🔤 👻						
Name:	*	SalesIntel Webhook Trigger						
Description:		Trigger <u>webhook</u> to append data from <u>SalesIntel</u> on Lead creation						
		CANCEL	ATE .					

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

SalesIntel Webhook Trigger	Smart List Flow Schedule Results		
🗑 New 🔹 🛛 📿 Campaign Actions 🔹	Wiew Campaign Members	🗖 🖉 Active Campaign — changes take 6	effect immediately
🎾 Use ALL filters 🔹 📔 🔺 Colla	pse All 🤝 Expand All	🖬 Auto-Save; r	no changes
🖌 Lead is Created		🖸 🗙 🛛 Jead is create	×
		Add Constraint ▼ Iggers ✓ Lead is Created	

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

SalesIntel Webhook Trigger	Smart List	Flow	Schedule	Results	ß		
🗑 New 🔹 📿 Campaign Actions 🤹	Siew Camp	oaign Me <mark>m</mark> b	ers		— 🕰	ctive Campaign I changes take effec	t immediately
🛆 Collapse All 🛛 🤜 Expand All						🔚 Auto-Save: no cl	hanges
🔆 1 - Call Webhook					Θ×	call webhook	×
					Add Choice	90 Integration	
Webhook: SalesIntel Webhook *					*	Call Webhook	
	_		_	_			

4. Under Schedule, click Activate.



SalesIntel W	ebhook Trigger	Smart List	Flow	Schedule	Results
🛾 New 🤋 📿	Campaign Actions *	Edit Settings	View C	ampaign Member	5
Trigge	ered Campa	ign Schedu	ile		
Campaign 5	itatus: Inactive				
Smart <mark>List</mark> N	Aode: Triggere	ed			
System Prio	rity Default	÷.			
Smart Can	npaign Settings			EDIT	
If lead ha	s been in this Smar	t Campaign befo	re		
Each lead	can run through the	flow once			
If lead ha	s reached the comr	nunication limits	8		
Ignore lim	it				
	ACTIV	ATE			

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"



	Scheduled Webhook	Smart	List Flow	Schedule	R	esults	2		
	🗑 New 🐐 📿 Campa	gn Actions 🔹	🚳 View Campai	gn Members				8	Activ
	🧏 Use ALL filters 🔹 🛛	📥 Collaps	e All 🛛 🤝 Expan	d All					
I	🖉 Campaign is Rec	luested						0	×
I							Sector Add Co	onstraint	
	Source: is				٠	Marketo Flow Action			- 1
				1	lote:	Enter a memorable and well-d	efined campaign	descripti	on

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

Scheduled Webhook Smart I	List Flow	Schedule	Results	
🗑 New 🔹 📿 Campaign Actions 🔹	🐉 View Campaig	gn Members		a 🕰 Ad
🗠 Collapse All 🛛 🤝 Expand All				
🕂 1 - Call Webhook				0 ×
				🚭 Add Ch <mark>oi</mark> ce
Webhook: SalesIntel Webho	ook			*
	_	_		

- 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	Re	sults	N	
🖀 New 🐐 📿 Campaign	Actions •	iew Campaig	n Members			45	
Use Advanced filters	(1 or 2 or 3) and	4	٢		🛆 Coliapse All	🗢 Expand All	
🦻 1 - Company Name	e						0 × ^
Company Name: is en	npty			×			
🎾 2 - Job Title							0 X
Job Title: Is en	npty			*			
3 - First Name							o x
First Name: Is en	npty			۲			
🎾 4 - Email Address							ο×
Email Address: is no	empty						

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

Webhook Scheduler Smart L	ist Flow	Schedule	Results	ß
New Campaign Actions	🐉 View Campaig	gn Members		
🛆 Collapse All 🛛 🤜 Expand All				
😪 1 - Request Campaign				o ×
Requested Campaign: Scheduled W	/ebhook			*
	_	_	_	

6. Schedule this campaign as appropriate.



Webhook Schedul	er Smart List	Flow (53)	edule Re	sults		
a New + ∮Cat ←>	Schedule Rec	urrence				e ibers
	Any changes made wil	l replace the curre	nt recurrence sc	hedule.		
Batch C	Schedule:	Weekly	*			
_	First run:	09/9/2020	10:16 AM	✓ PDT		
Campaign Stati	Repeat every:	weeks or	1:			
Smart List Mod		Sunday	🛛 Monday	🗹 Tuesday	🛛 Wednesday	
Smart List Stati		🔁 Thursday	🛛 Friday	🔁 Saturday		
	End on:	O No end dat	e			
Smart Campa		09/15/202	0 11			
If lead has be						
Each lead can					CANCEL SAVE	
If lead has re					SHIELE 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.



salesinteldev						Notifications: 4	Scott Ferrebee	History *
		Scheduled Webhook	Smart Li	st Flow	Schedule	Results		
Marketing Activities	2.	🗑 New 🔹 📿 Campaign	Actions 💌	🐉 View Campaig	gn Members			a 🛆 Act
S MySmartCampaign	*	🎾 Use ALL filters 🔹 🔰	🛆 Collapse	All 🛛 😴 Expan	d All			
Newsletters Nurture		🖌 Campaign is Requ	ested					0 X
💡 Test web hook							>Add	Constraint 💌
i Web Content		Source: is				- Marketo Flow Action	I	*
🎯 Web Forms					N	ote: Enter a memorable and	well-defined campaig	n description
🖻 🍓 Operational		_	_	_	_	_	_	
🍓 Data Management								
Interesting Moments								
ifecycle								
SalesIntel Webhook Trigger								
💡 Scheduled Webhook								
Scoring								

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

	Scheduled Webho	ook Smart	List Flow	Schedule	Results			
I	🗑 New 🔹 🛛 💡 Carr	paign Actions 🔹	🐉 View Campaig	n Members			=	Act
1	🛆 Collapse All 🛛 🤜	Expand All						
l	🔆 1 - Call Webho	ook					Ð	×
i							🔩 Add Choic	e
l	Webhook:	SalesIntel Webh	ook			I	Ŧ	. 1

- 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 🔹 🚳 V	iew Campaign Members			
🎾 Use ALL filters 🔹 🔰	🛆 Collapse All	🗢 Expand All			
🌮 1 - Lead Status				ο×	
Lead Status: is			- MQL	0 -	
				ß	
🍠 2 - Updated At				ο×	
Updated At: in pa	st		* 1 week		

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

Webhook Scheduler S	nart List Flow	Schedule	Results	
🗑 New 🔹 📿 Campaign Actio	ns 🔹 😽 View Campa	ign Me <mark>mb</mark> ers		
📥 Collapse All 🛛 😎 Expand All				
😨 1 - Request Campaign				Θ×
				-Add Choice
Requested Campaign: Sched	uled Webhook			I -
		_		

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





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.

salesinteldev			Notifications: 5	Scott Ferrebee	# History	🔿 Admin 🦓 Com	munity 🗶 Help -
w la	SalesIntel Enriched Leads Smart List						
Lead Database J	T INew * List Actions *						8
⊒⊕ Default	🔶 🎾 Use ALL Fibers 🐖 📔 🚿 Collapse All 🔍 Expand All					📕 Auto-Save: Sep :	29, 8:27 AM POT
i i i i i i i i i i i i i i i i i i i	1 - Webhook is Called				0 × °	data	×
🕵 All Leads				September 2015	Constraint +	3 Filters	
👗 Unsubscribed Leads	Webhook: is		SalesIntel Webhook		0 -	3 St Lead History	
Marketing Suspended	Date of Activity: after	*	09/1/2020		III (3	Data Value	Changed
🐻 Blocklist						Program M	ember Data was Chan
🚴 Bounced Email Addresses 🎍 Possible Duplicates	🦅 2 - Data Value Changed				ο×	a 😋 Lead Attribute	. 5
S No Acquisition Program				🎾 Add (Constraint 🔹	a 🚳 inactivity Filte	rs
🖻 🍓 Group Smart Lists	Attribute: State			E -		Not Data V	alue Changed
Caractusion Lists	Date of Activity: after		09/1/2020			Not Progra	m Member Data was C
🗟 🏐 Operational Lists							
Leads Created Today							
SalesIntel Enriched							4
🏐 Target Lists							
						-	

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

SalesIn	itel Enriche	d Lead	is Smart Lis	ŧ		
New 1	List Acti	ons 🔹 😩	Lead Actions 🔹	🛃 Delete Lead	Select All	
View: I	Default 🔹					
Id	Last	First	Job Title	Company	Email	Phone
<u>208</u>	Tomlinson	Jennifer	Global Chann	Microsoft Corp	jesidd@microsoft.com	
<u>208</u>	Tomlinson	Jennifer	Global Chann	Microsoft Corp	jesidd@microsoft.com	
<u>208</u>	Fuertes	Narson	Senior Comp	Apple, Inc	nfuertes@apple.com	(408) 996
<u>208</u>	Gross	Ben	Manager, <mark>S</mark> tr	Apple, Inc	ben_gross@apple.com	(408) 996
<u>208</u>	Fuertes	Narson	Senior Comp	Apple, Inc	nfuertes@apple.com	
<u>208</u>	Rathore	krishna	qa	Google, Inc	test@test.com	12345698
<u>208</u>	Tomlinson	Jennifer	Global Chann	Microsoft Cor	j <u>esidd@microsoft.com</u>	42570565