Your Guide to CallRail’s integration with Marketo
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What is CallRail?

CallRail provides call analytics to data driven marketers so they can improve customer acquisition. Delivering intuitive self-service software to businesses that care about phone calls, CallRail enables smart marketers to know what makes their phone ring. CallRail tracks phone calls from online and offline marketing campaigns (including PPC keywords), provides insight into which campaigns are working best, and records calls for lead qualification and coaching to increase call conversion rates.

What does CallRail’s Direct Connect with Marketo provide?

Once your integration is authorized, CallRail will close the lead attribution gap by sending phone call and text message events from your tracking numbers into Marketo’s lead activity log. With all your lead activity in one place, a holistic view into lead life cycles is possible.

What you need to get started with the integration:

• An active CallRail account
• CallRail’s Dynamic Number Insertion feature installed on your website
• Your Marketo Client ID
• Your Marketo Client Secret
• Your Marketo Munchkin Account ID
• CallRail’s Keyword-Level Tracking
• Two New Marketo Custom Activities
Where will you see your data?

After integrating CallRail with Marketo, all activities a lead has performed will be available in the Activity Log within Marketo. CallRail will differentiate between phone call and SMS message activities in the Activity Type column.

CallRail will push data to Marketo according to a caller’s Munchkin ID or telephone number as follows:

- If the caller is already associated with a Marketo Munchkin, the activity tracked within CallRail will be the corresponding Lead Activity in Marketo.
- If no Munchkin is available, CallRail will create a new Lead and associate the phone call or SMS activity with the new Lead Activity in Marketo.
SMS Event Details present specific information about a text message received by your CallRail tracking numbers. This includes the lead source, the message content, tracking phone number, and the caller ID information.

Phone Call Event Details present specific information about a phone call received by your CallRail tracking numbers. This includes the lead source, the tracking number that received the call, the call result, as well as the caller’s name and the caller ID information.
Get started with Marketo:

To get started with CallRail’s Direct Connect integration with Marketo, you’ll need your Client ID, Client Secret, and Munchkin Account ID. If you have already set up a custom API with Marketo, then you may proceed to step 6 on page 8 of this guide. Otherwise, here’s how to set up the integration within Marketo:

1. Once you’re logged into your Marketo account, select Admin from the top of the page.

2. Select Users & Roles from the left panel. Then select the Roles tab to the right. Click New Role just below this tab to begin creating the new role.

3. Enter a Role Name of “API Role” and check the box next to Access API to enable all options within this category. Then, select Create.
4. Invite a new API-only user to associate with the role you just created. Select the Users tab and then select Invite New User.

5. Enter a name and email for the new API-only user. Associate this user with the API role that was created in step 3 by checking API Role under Roles. Check the API-only user check box, and click Invite.
6. Create a custom service to identify the CallRail application by selecting **Admin**, then **LaunchPoint** on the left-hand side of the page. Then select **New > New Service**.

7. Provide a **Display Name** and choose **Custom** from the Service drop-down. Then provide a **Description** and select the User Email Address associated with the **API-Only user** created in step 5. Marketo recommends using a descriptive Display Name that illustrates the purpose of this Custom REST API Service (i.e., CallRail, or Call Tracking). Click **Create**.
8. Select **View Details** for the new service that’s been created.

9. Retrieve the **Client ID** and **Client Secret** from the details that appear. Save this information for the integration setup within CallRail. Click **Close**.

10. Finally, retrieve your **Munchkin Account ID** by selecting **Munchkin** in the left-hand column. Save this information for the integration setup within CallRail, which is continued on the next page.
Use CallRail to configure your integration:

1. From your CallRail dashboard, select the company where you’d like to enable the Direct Connect integration with Marketo.

2. Select Settings from the top of the page.

3. Select Integrations from the secondary menu, then click All Integrations.
4. Select **Activate** from the Marketo integration option.

5. Enter your **Client ID, Client Secret, and Munchkin Account ID** from Marketo within the correlating fields in CallRail.

6. Select **Open and Compose Email**. An email will appear on your screen that contains all the information you’ll need to add custom activities to your account in Marketo.
7. Select **Save** before you continue to retain all the information in input fields. This will move the integration to **pending**.

8. While your integration is pending, the Marketo option on the **All Integrations** page will display a yellow alert.

9. To complete your integration, you will need to create custom activities within Marketo. **Please refer to pages 13-17 to learn how to set-up your custom activities.**
Create Custom Activities and Fields with Marketo:

Next, you will need to create two new Custom Activities within Marketo - one for phone calls and one for text messages. Here is how to create a new Custom Activity:

1. Click Admin.

2. In Database Management click Custom Activities.

3. Click New Custom Activity.
4. Enter "Phone Call Event" as the display name and "Event for inbound phone call" as the description, then click Next.

5. Define your Filter and Trigger as "Phone Call" and click Next.
6. Define your custom activity's primary field as "Tracker Name". Click Submit.

7. Repeat steps 3-6 for SMS Messages.
   - Your SMS activity's name should be "SMS Message Event" and the description should be "Event for an inbound text message".
   - The Filter and Trigger should be "SMS Message".
   - The primary field name is "Message Content".

   After you’ve created your custom activities, you’ll need to add Custom Activity Fields to your Events.

8. In Marketo Custom Activities, click Fields.
9. Select the “Phone Call Event” activity.

10. Click New Field.

11. Choose the field’s data type as String. Name the field. The Api Name auto-populates. You will need to name the first field “Tracking Phone Number”. When you’re done, click Save.
12. You will need to repeat steps 3-4 for the following fields:

- Customer Name
- Customer Phone Number
- Call Duration
- Call Result
- Call Recording Link

13. Repeat steps 1-6 for SMS Messages. You will need to create the following fields for SMS Messages:

- Tracker Name
- Tracking Phone Number
- Customer Name
- Customer Phone Number

14. Go to page 18 to complete your integration.
Contact CallRail to Complete your Integration:

9. Once your custom activities have been added in Marketo, and you’ve set your integration to Pending, email support@callrail.com to let us know you’ve added your activities. This will allow CallRail Support to complete the integration activation on our end, and update the status of the integration to Active.