



## 360 SMS Pardot/Marketo Integration

Pardot and Marketo's primary method of integrating with native Salesforce is via its "**Completion Actions**" feature whereby a web hit or form completion or any other Pardot action can among many completion actions "Create Salesforce Task" for the given Contact or Lead, or "Add to Salesforce Campaign".

Of course, Pardot/Marketo also has numerous other trigger points where it either Updates Pardot Scores or Creates Records in Salesforce, any of which can fire off an SMS using standard Salesforce Process Builder techniques.

Below are a few Pardot Screen Captures of the most popular method using Pardot Page Actions and specifically the **Completion Actions** feature.

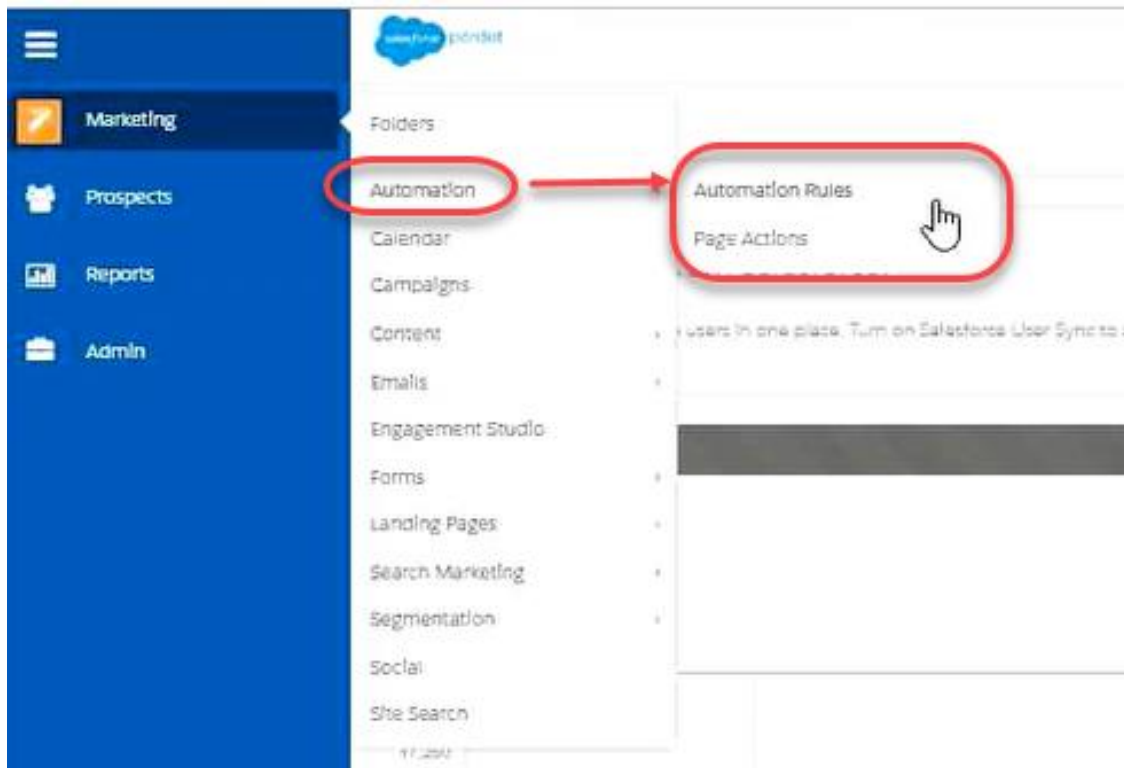


Figure 1 - The most common Pardot integration w/ Salesforce is through the Automation Rules or Page Actions feature



pardot

HOME > MARKETING > AUTOMATION

### Page Actions

#### Create Page Action

Name\* Pricing Page

Page URL\* <http://www.your/site.com/pricing.html>

Page Score\* 1

Scoring Category

Priority Page?

#### Completion Actions

Completion Actions

**Create Salesforce task** Hide Task Configuration

Subject

Assigned to\* CRM Owner

Priority\* Normal

Status\* Not Started

Due:  days from today

Reminder:  days from today

Comments

+ Add new completion action

Completion actions will only run for identified prospects browsing this page.

**Use an agreed upon subject such as "Send SMS"**

**Put an SMS Template ID here.**

Figure 2 - Use the Pardot Completion Action to create a Salesforce Task placing the SMS Template Id in the comments

Send Smart List **Flow** Schedule Results

New Campaign Actions View Campaign Members

Collapse All Expand All

#### 1 - Create Task

Subject: x

Comments: x

Due In: Number of days...

Owner: -- Assign to Sales Owner --

Priority: Select...

Status: Select...

Notify: Select...

Remind In: Number of days...

Add Choice

Figure 3 - Marketo Create Task screen is similar to Pardot



## Integration Points

Of course, Pardot/Marketo has many other integration points with Salesforce all of which could trigger an SMS using the normal Salesforce Process Builder functionality. Salesforce doesn't care how those actions occurred or where they were initiated from, so you simply create your Process Builder in the normal fashion as documented in this hyperlinked article: [Sending SMS through Process Builder](#).

**IMPORTANT:** The "integration user" which both Pardot and Marketo use to create the Tasks, must be licensed for 360SMS and be associated to the Sender Number(s).

Examples of other Pardot initiated actions:

- When a Lead is created
- When Lead/Contact is added to a Salesforce Campaign
- A Pardot Score reaches a certain number – Pardot scores are automatically updated in Salesforce
- Pardot updates some other Salesforce field from a Pardot form collection

## Automatic Out-of-Box Pardot/Marketo Integration

360SMS has Automatic Pardot/Marketo Integration for the "Create Salesforce Task" action, negating the need to write the Salesforce Process Builder documented in the next section. This also works for Marketo created Tasks even though the setting says Pardot. In fact, it would work for any task so long as the format noted below is used.

The manual method is still useful and needed if you have additional custom business logic such as dynamic Sender Numbers or if you desire to Schedule the SMS for a date driven by the Pardot or Marketo Completion Actions DUE field.



Write to [support@360degreeapps.com](mailto:support@360degreeapps.com) to enable the automatic Pardot Salesforce Task trigger instead of writing your own Process Builder.

**IMPORTANT:** For the automatic method you need to define the Subject and Description in the respective Pardot or Marketo TASK **exactly** as shown below:

Subject: 360 SMS

Description: PhoneApi field name, TemplateId or Survey QuestionId, SenderNumber(Optional)

**Example Description:** MobilePhone,a08f400000BxGFfAAN,17206050632



## Manually Creating the Process Builder

To send an outbound SMS as a Pardot action, one need only create a process builder on the creation of a specified task. In the example, below we ask that the Pardot administrator create Salesforce Tasks with the syntax:

**Subject** = Send SMS (any fields or combination of fields can be used - this is just a suggestion)

**Description** = an SMS Template Id or Survey Question ID. Note that the Template or Survey Question OBJECT must match either a Lead or Contact if it contains specific object merge tags.

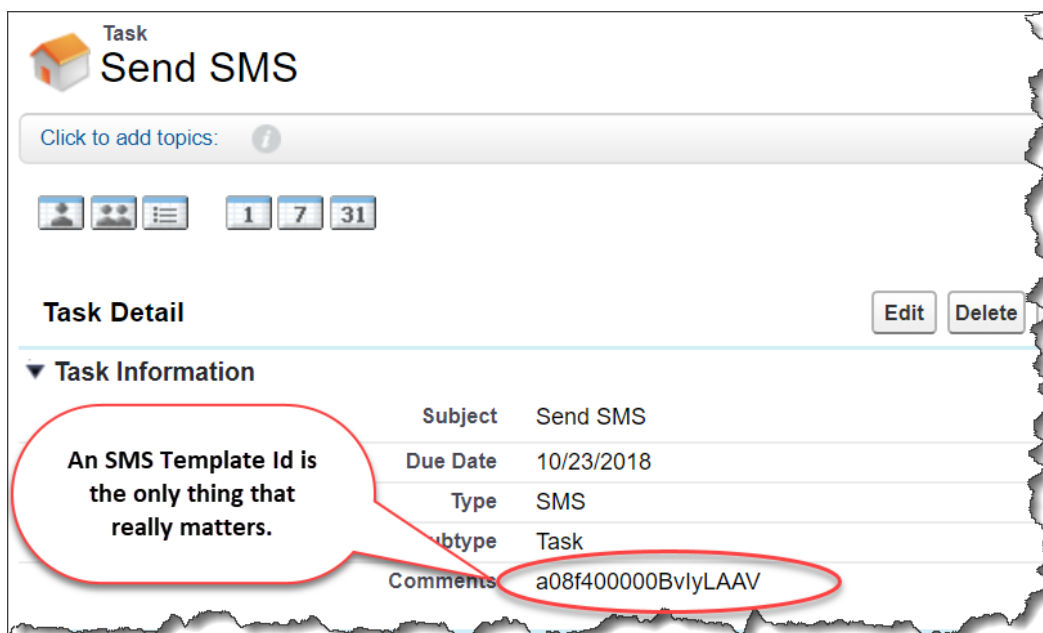


Figure 4 - Pardot creates Salesforce Tasks via Completion Actions

Below are the screen captures of the simple Task based object Process Builder.

In the criteria, the subject or any other field can be used as the trigger criteria, the Pardot/Marketo Administrator and Salesforce Administrator need only agree on the syntax. We also do recommend that the Pardot/Marketo Administrator set the Task to Status = Completed.

Additionally, if the Pardot/Marketo Administrator utilizes the dynamic Due\_Date field, the Salesforce Process Builder can easily SCHEDULE the SMS to be delivered based on the resulting Task.Due\_Date. Note that neither Pardot/Marketo nor Salesforce Tasks has a TIME OF DAY component so the Process Builder developer would be responsible for manufacturing a proper DateTime field. Refer to the article hyperlinked here for programmatically scheduling SMS via Process Builder: [Scheduled SMS w/ Process Builder](#) and [Figure 7](#) below shows the exact logic.



For most use cases you do not need any sophisticated criteria other than “IF SUBJECT = SEND SMS” but in the example below, we had a need to know the difference between Contacts and Leads because we have business logic to dynamically set the Sender Number to the Contact.Owner.SMS\_Sender\_Number or Lead.Owner.SMS\_Sender\_Number.

Because Salesforce uses a polymorphic WhoId field (labeled either NameId or Name) to hold either a Contact or Lead Id, we inspect the first 3 characters of the WhoId. **003** is the prefix for a Contact object and **00Q** indicates the Lead object (those are zero’s not the letter o). Because you can simply pass the WhoId to the Scheduled SMS Name and Related Object Id, this is not even necessary for most cases.

The screenshot shows the Salesforce Process Builder interface for a task named "Send SMS". On the left, a flowchart shows a decision diamond with the criteria "Contact + Subject = Send SMS". A red circle highlights this diamond, and a red arrow points from it to the configuration panel on the right. The configuration panel is titled "Define Criteria for this Action Group" and shows the criteria name "Contact + Subject = Send SMS". Below this, there are three conditions defined in a table:

| Field*               | Operator*   | Type*   | Value*   |
|----------------------|-------------|---------|----------|
| [Task].Subject Q     | Starts with | String  | Send SMS |
| [Task].WhoId Q       | Starts with | ID      | 003      |
| [Task].Description Q | Is null     | Boolean | False    |

A red callout bubble points to the "003" value in the second row, containing the text: "003 = Contact object" and "00Q = Lead object".

Figure 5 - Criteria for triggering the Send SMS - this is not even needed by most. But in this example we need a dynamic sender number from the Contact or Lead. If you are using a single SENDER Number or you have no additional logic that is needed from the Contact or Lead, you can make the criteria simply Subject = Send SMS.



Action Type\*  
 Create a Record

Action Name\* ⓘ  
 Send SMS

Record Type\*  
 Scheduled SMS

Set Field Values

| Field*             | Type*           | Value*                     |
|--------------------|-----------------|----------------------------|
| Scheduled Sms Name | Field Reference | [Task].WhoId               |
| Related Object Id  | Field Reference | [Task].WhoId               |
| Phone Api          | String          | MobilePhone                |
| SMS Template       | Formula         | TRIM(LEFT([Task].Descri... |

Insert: Field 🔍 Function 🔍 System Varia... 🔍 Operator

TRIM(LEFT([Task].Description,18)

Figure 6 - Send the SMS via one of the methods described in the [Sending SMS through Process Builder](#). The Task.WhoId will know automatically if it's a Lead or Contact. Make sure that the SMS Template.Object corresponds to a Lead or Contact object.

## Scheduled SMS

Below is a screen capture of a method in which the Pardot/Marketo Administrator can set the Task.Due\_Date field in the Pardot Completion Action and have the SMS be Scheduled. In Pardot Completion Actions this is a Number-Of-Days to Offset the date. Example: if today is November 1 and the admin sets the value to 3 the resulting SF Task if set for November 4.

As noted in the comment for the Scheduled Time formula, the developer needs to handle the Time carefully as simply converting the Task.DueDate to a DateTime field will set the time to midnight GMT which will be -5 hrs for Eastern (Day before @ 7:00 PM) or -7 hrs for Mountain (Day before @ 5:00 PM).



Process Builder - Pardot - Task - SMS Trigger

Expand All Collapse All View All Processes Clone Edit Properties Activate

Define Criteria for this Action Group

Criteria Name\* 1  
Pardot - Send SMS Subject - Sched

Criteria for Executing Actions\*  
 Conditions are met  
 Formula evaluates to true  
 No criteria—just execute the actions!

Set Conditions

| Field*               | Operator* | Type*   | Value*            |
|----------------------|-----------|---------|-------------------|
| 1 [Task].Subject     | Equals    | String  | Send SMS - Schedu |
| 2 [Task].Activity... | Is null   | Boolean | False             |
| 3 [Task].Descript... | Is null   | Boolean | False             |

Conditions\*  
 All of the conditions are  
 Any of the conditions are  
 Customize the logic

Create a Record

| Field*             | Type*           | Value*                 |
|--------------------|-----------------|------------------------|
| Scheduled Sms Name | Field Reference | [Task].WhoId           |
| Related Object Id  | Field Reference | [Task].WhoId           |
| Phone Api          | String          | mobilephone            |
| Sender Number      | String          | 17206050632            |
| SMS Template       | Formula         | TRIM(LEFT([Task].De... |
| Contact            | Formula         | /*****                 |
| Lead               | Formula         | /*****                 |
| Scheduled Time     | Formula         | /*****                 |

Insert: Field Function System Varia... Operator

Task DueDate is a date only field and simply converting it would schedule the SMS for midnight. SF converts the time zone from GMT midnight to 5:00pm previous day for MST which is 12:00 - 7 Hrs = 5:00PM. So we add some time to make it go out at 10:00 AM Mountain (7hrs to get back to midnight then 10 hrs)

We could also have manufactured the DateTime field YYYY-MM-DD HH:MM:SS but that's a bigger pain. DATETIMEVALUE("2019-02-02 20:25:00")

DATETIMEVALUE([Task].ActivityDate) + (17/24)

Save Cancel Delete

Figure 7 - Scheduling the SMS using the Scheduled Time field vs. Firing it immediately



### About the Author

Steve Roch, CEO of Bolder CRM is an SMS Industry expert having worked or consulted with the top three SMS Apps on the Salesforce AppExchange and also having built the popular Salesforce app [ActionGrid™](#), acquired by Conga in April-2016. Bolder CRM is the exclusive distributor of 360 SMS in the United States, Canada and the United Kingdom.

Learn more about Steve and Bolder CRM at <https://boldercrm.com/360SMS> and <https://www.linkedin.com/in/steveroch/>