



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** or **Marketo** action can among many completion actions “**Create Salesforce Task**” for the given Contact or Lead, or “**Add to Salesforce Campaign**”.

Of course, Pardot and Marketo also have numerous other trigger points such as updating Salesforce Fields, 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 followed by screen captures of Marketo (**Figure 3**)

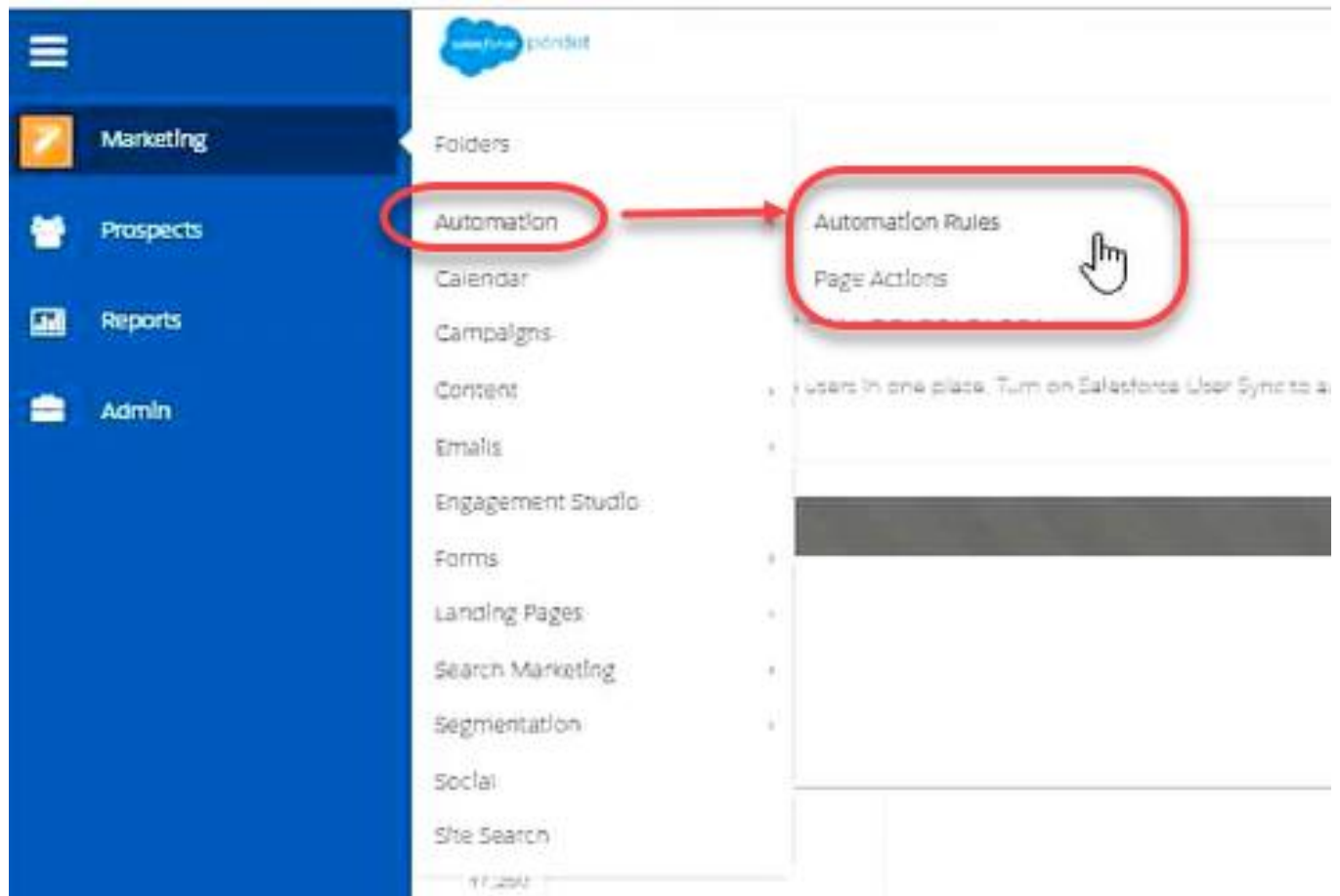


Figure 1 - The most common Pardot integration w/ Salesforce is through the Automation Rules or Page Actions feature



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 can trigger an SMS using the normal Salesforce Process Builder or Flow functionality. Salesforce doesn't care how those actions occurred or where they were initiated from, so you simply create your Process Builder or Flow 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.

To enable the automatic method run this installer which will then enable the Pardot/Marketo feature: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t6F000003iuaO>



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)

IMPORTANT: The template or survey must be based on the Contact or Lead object and the object must match that of the Name(Whold).

Example Description: `MobilePhone,a085G000012HiaYQAS,17206050632`

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 Task.ActivityDate field (aka Due Date).



Manually Creating the Process Builder or Flow

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, Survey_Id, Survey_Question_Id or DripCampaign_Id. Note that the Template or Survey Question OBJECT must match either a Lead or Contact if it contains specific object merge tags.

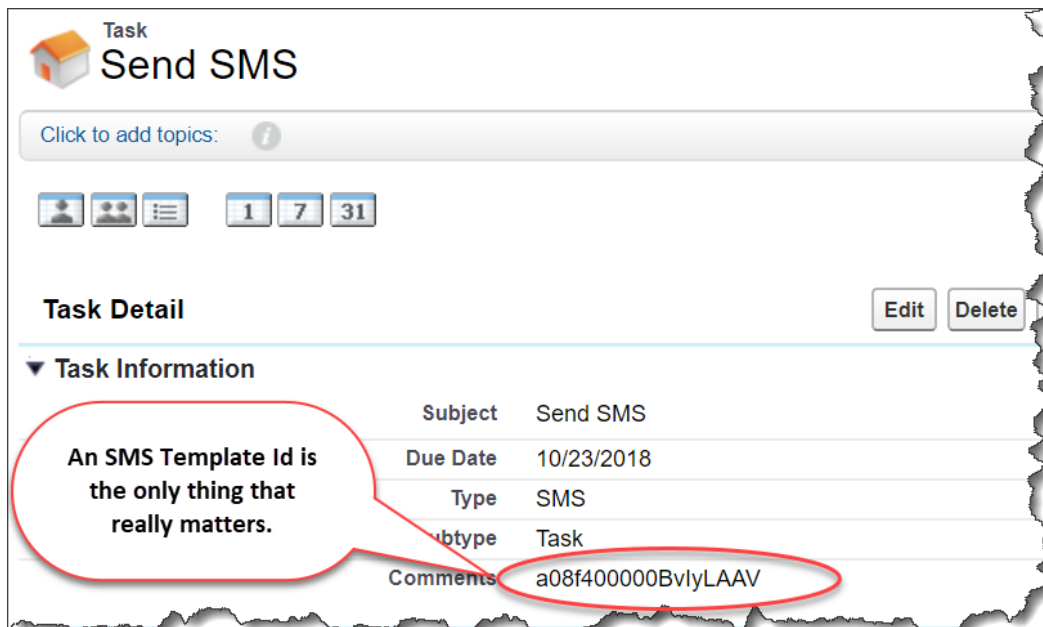


Figure 4 - Pardot creates Salesforce Tasks via Completion Actions

Below are the screen captures of the simple Task based object Process Builder followed by a Flow approach.

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 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/Flow 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 Whold field (labeled either NameId or Name) to hold either a Contact or Lead Id, we inspect the first 3 characters of the Whold. **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 Whold to the Scheduled SMS Name and Related Object Id, this is not even necessary for most cases.

Field*	Operator*	Type*	Value*
1 [Task].Subject	Starts with	String	Send SMS
2 [Task].WhoId	Starts with	ID	003
3 [Task].Description	Is null	Boolean	False

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



TASK - Record Trigger

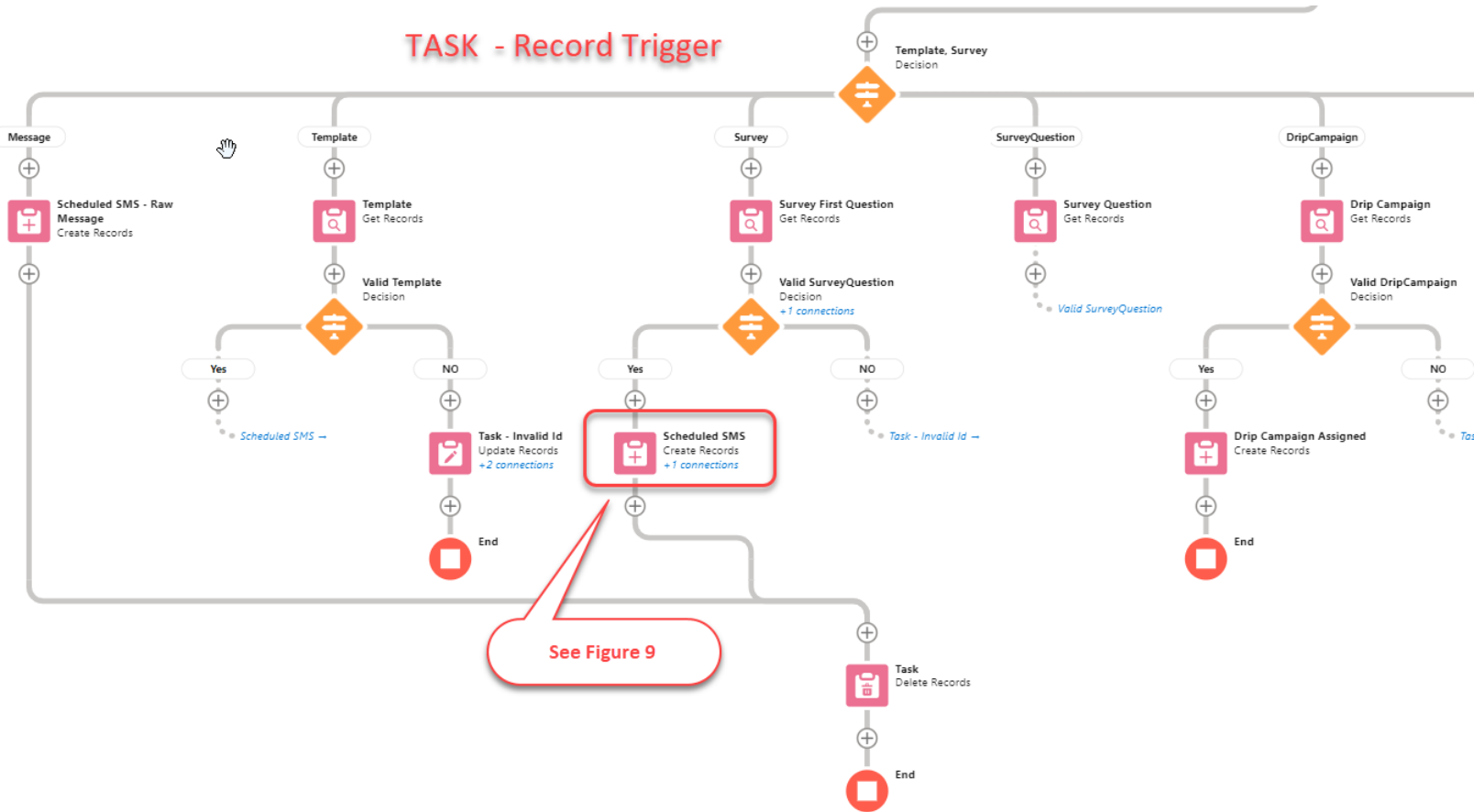


Figure 8 - A Salesforce Record Trigger Flow is also available



Edit Create Records

Create Salesforce records using values from the flow.

* Label: * API Name:

Create a Record of This Object

* Object:

Set Field Values for the Scheduled SMS

Field	Value
<input type="text" value="Name"/>	<input type="text" value="Task from recTask > Name ID"/>
<input type="text" value="OwnerId"/>	<input type="text" value="Task from recTask > Assigned To ID"/>
<input type="text" value="tdc_tsw_Contact_c"/>	<input type="text" value="fxContactId"/>
<input type="text" value="tdc_tsw_Lead_c"/>	<input type="text" value="fxLeadId"/>
<input type="text" value="tdc_tsw_Next_SMS_Send_Date_c"/>	<input type="text" value="fxScheduledTime"/>
<input type="text" value="tdc_tsw_Phone_Api_c"/>	<input type="text" value="MobilePhone"/>
<input type="text" value="tdc_tsw_Question_c"/>	<input type="text" value="vSurveyQuestionId"/>
<input type="text" value="tdc_tsw_Related_Object_Id_c"/>	<input type="text" value="Task from recTask > Name ID"/>
<input type="text" value="tdc_tsw_SMS_Template_c"/>	<input type="text" value="vTemplateId"/>
<input type="text" value="tdc_tsw_Scheduled_Time_c"/>	<input type="text" value="fxScheduledTime"/>
<input type="text" value="tdc_tsw_Sender_Number_c"/>	<input type="text" value="vStickySender"/>

Figure 9 - Scheduled SMS via a Salesforce Flow



Edit Formula

fxScheduledTime

Just for consistency we always add 5 minutes to the DateTime of the Task and convert that Task.Date field to the time component of NOW() + 5 minutes. So this allows the Pardot/Marketo admin to set the Date into the future but since Tasks do not have a DateTime field all we can do is allow the future date and then use NOW() + 5 minutes for the time portion....

* Data Type

Date/Time

* Formula

Insert a resource... All Functions Insert a function... Select an Operator...

```
IF ( NOT ( ISBLANK ( {!recTask.ActivityDate} ) ),  
/*THEN - manufacture a DateTime value from the Date only. Can't use DateTimeValue as that will give us 12:00am GMT*/  
/* the MID (date,12,8) is getting a string like 2022-05-21T18:05:55 to get just the 18:05:55 time. */  
DATETIMEVALUE( TEXT( {!recTask.ActivityDate} ) & " " & MID( TEXT( NOW() + 5/60/24 , 12, 8) ,  
/*ELSE - NOW + 5 minutes */  
NOW() + 5/60/24 /*add 5 minutes*/  
)
```

Figure 10 - If you desire an actual Scheduled DateTime -this is a little tricky since SF Tasks are DATE Only (no time)



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.

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