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Market Sharp ▾



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MarketSharp Integration

Jeff Moss - Monday at 13:11

The **Sales Rabbit-MarketSharp** integration allows selected lead statuses created in Sales Rabbit to push **First and last Name, Phone number, Notes, Appointment Date/Time, Rep Name, and Status** into MarketSharp.

Note: You must have **Admin access** in both MarketSharp and Sales Rabbit in order to setup the integration. This integration is a **3 step process**.

1. Setting Up Lead Statuses In MarketSharp:

In MarketSharp go to **Admin>Lead Capture Setup>SalesRabbit** (Page pictured below)

The screenshot shows the MarketSharp Admin interface. At the top, there is a navigation bar with buttons for Contacts, Activity List, Scheduler, Calendar, Sales, Production, Service, and Reporting. Below this is the 'SalesRabbit Lead Capture Maintenance' section. It features the SalesRabbit logo and a table of lead statuses. The table has columns for Name, Form Id, Primary Source, Secondary Source, Attached Activity Process, and Delete. Two rows are visible: 'Call Back' with Form Id 'cb' and 'Not Home' with Form Id 'nh'. A red box highlights the 'cb' Form Id in the first row. Below the table, there is a footer with copyright information and links to Subscription Agreement, Privacy Policy, and Contact Us.

	Name	Form Id	Primary Source	Secondary Source	Attached Activity Process	Delete
	Test Call Back	cb	Canvass		Call Back To Set 2 Days	
	Test Not Home	nh	Canvass		Call Back To Set 2 Hours	

Here you will create the same Lead Statuses that you have in SalesRabbit (Page pictured below) in MarketSharp by clicking on the **Yellow Pencil**. Model them after the statuses created in the picture above. **The "Form ID" is essential for syncing the statuses, it is just the abbreviation for the Lead Status in Sales Rabbit.** To get a list of your Lead Statuses and abbreviations go in the SalesRabbit Web App (app.salesrabbit.com) to **Settings>Leads>Settings>Statuses**.

Lead Status Settings				
Icon	Name	Abbreviation	Status	Type
	Callback	CB	Active	Normal
	Customer	CX	Active	Customer
	Go Back	GB	Active	Normal
	Not Home	NH	Active	Normal
	Not Interested	NI	Active	Normal
	Other	OTH	Active	Normal
	Presentation Given	PG	Active	Normal

Once you have created the Lead Statuses you want to sync from SalesRabbit to MarketSharp you will then be able to link accounts.

2. Linking Company Accounts:

In MarketSharp and go to "**My Account**" (located in the upper right-hand corner of your page) (Page pictured below)

Your Company LOGO HERE

Sales Rabbit Demo
505 King St
La Crosse, WI 54601
Company ID: 2132

Welcome, Brady Anderson [Logout]

powered by: **MarketSharp**

Call Center | Corporate Admin | Admin | My Account | Help

Click here to send feedback

Brady Anderson's Account

Account Information

Note: If you are a corporate user, it is important to note which company you are currently logged into.

Username: Brady
Current Login Duration: 1 second
Previous Login Time: 9/15/2015 3:36 PM
of Logins (Past 7 Days): 6
Current Company: Sales Rabbit Demo
Current Company ID: 2132
Local Company Timezone: Central Daylight Time
Local Company Time: 9/15/2015 5:27 PM

Account Settings

[Time Sheet](#)
[Change My Password](#)
[Reset User Preferences](#)

MarketSharp Package Information

MarketSharp Package: Pro

Prospects Leads Customers

Modules

JobCost/Commission Production Proposals Quickbooks Service

Add-on Apps

800 Response API Call Center Estimator
 Listen360 Customers Listen360 Leads Marketsharp Email
 Salesperson Appointment Routing SFI Central Five9

Company Storage Information

Total File Space Used: 10.91 MB (0.2%)
Total File Capacity: 5.00 GB
Last Calculation Date: 9/15/2015 4:02 PM
Company Timezone: Central Daylight Time

On this page you will need to select the same "**Lead Statuses**" you created in MarketSharp that you are wanting to sync over.

In the SalesRabbit Web App go to **Integration**. (Page pictured below)

Integration Settings

Market Sharp Account

Lead Statuses (only checked statuses will sync)

Callback
 Customer
 Go Back
 Not Home
 Not Interested
 Other
 Presentation Given

For each office in MarketSharp you will need to copy your "**Current CompanyID**:" and then insert this number into that same office in Sales Rabbit.

Go to **Management>Offices>Click on the desired office>Edit**. Then input the companyID in the field labeled "**External ID**" then click "**Save**". (Pictured Below)

Provo
Save

* Region: Utah

* Office: Provo

External ID: 644-11

Latitude: 0

Longitude: 0

Radius: 0

Address:

City: State: [State]

Zipcode:

Phone:

Fax:

Photo: [Upload an Office Photo](#)
(If your image is not square, it will be resized.)

Office Teams:

New Team: Add

Start Date:

Market Sharp Account

Company ID: Here insert your MarketSharp Current Company ID that you just copied from your MarketSharp Account.

Lead Statuses: Check the box next to each of the lead statuses you would like to have sync to your MarketSharp account.

Attention: Choose only lead statuses that will contain the **required** lead info fields. (I.e. **FirstName, LastName, and Email or Phone**).

Once you have inserted the CompanyID and selected your desired lead statuses click **"Save"** in the upper right-hand corner of the page.

Going forward you accounts will now be linked. The last step is to link your users/employees.

3. Connecting Users Specifically:

In MarketSharp go to **Admin>Employee Maintenance** (Page pictured below)



Sales Rabbit Demo
505 King St
La Crosse, WI 54601
Company ID: 2132

Welcome, Brady Anderson [Logout]

powered by: 

[Call Center](#) | [Corporate Admin](#) | [Admin](#) | [My Account](#) | [Help](#)

Contacts

Activity List

Scheduler

Calendar

Sales

Production

Service

Reporting

Click here to send feedback

Employee Maintenance

[Add New Employee](#) Show Inactive Employees

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Edit	Change Password	Permissions	Username	Name	Email	Types	Login Restrictions	Active
			Admin	Admin	jason@marketsharp.com	System Administrator		
			Brady	Brady Anderson		System Administrator		
			Ed	Ed Thompson		Production		
			Jack	Jack Smith	jason@marketsharp.com	Salesperson		

Here you will take **"Username"** from MarketSharp and insert it to the same user's account in Sales Rabbit.

In Sales Rabbit go to **Management>Users>List>(name of the user you are wanting to insert the "Username" for)** (Page pictured below)

Click on "Manage ID's" and then an input box will populate. (Pictured below)

Insert the "Username" from that same employee in MarketSharp in the box and click "Add ID". Once you clicked "Add ID" you can close out of that box and your user's name will be attached to any leads they submit from Sales Rabbit into MarketSharp.

Now that you have completed these three steps your Sales Rabbit account will be properly integrated with MarketSharp!

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