# MarketSharp Integration

Jeff Moss - Monday at 13:11

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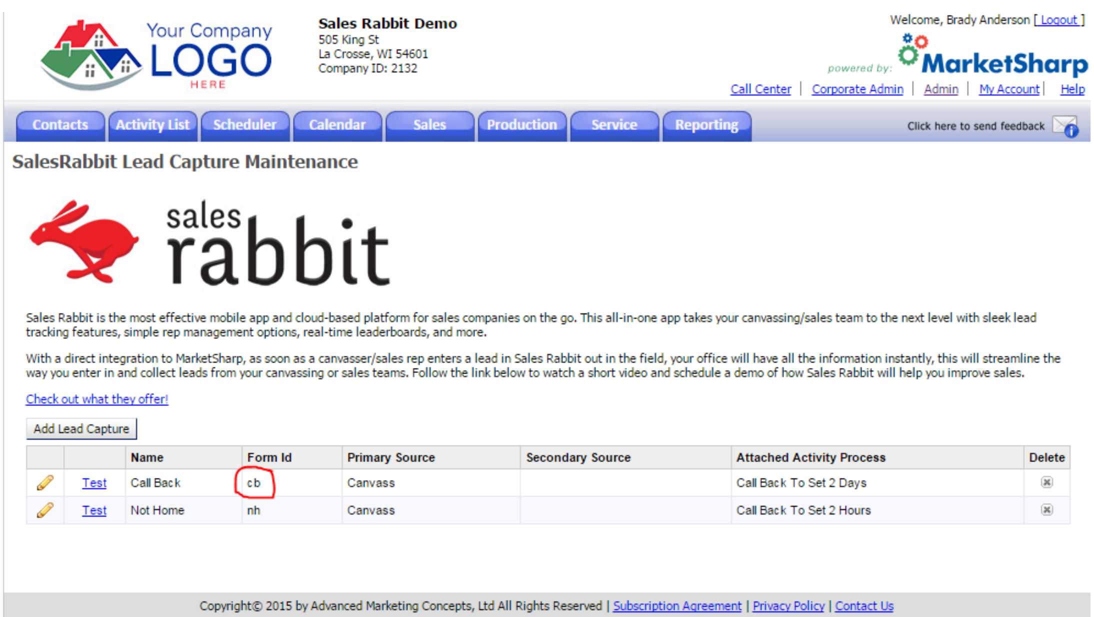
The **Sales Rabbit-MarketSharp** integration allows selected lead statuses created in Sales Rabbit to push **First and last Name, Phone number, Notes, Appointment Date/Time, Rep Name, and Status** into MarketSharp.

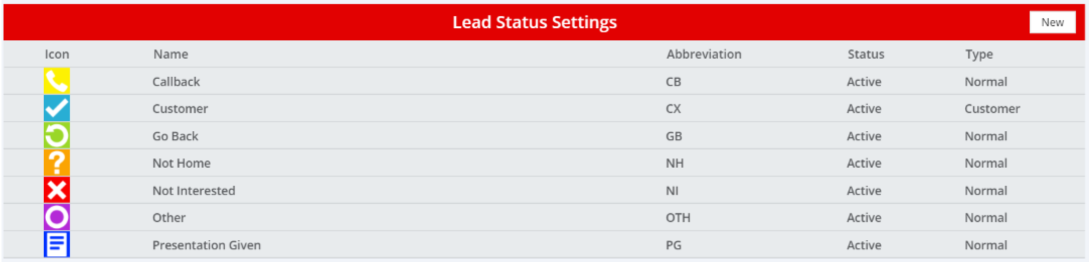
**Note:** You must have **Admin access** in both MarketSharp and Sales Rabbit in order to setup the integration. This integration is a **3 step process**.

**1. Setting Up Lead Statuses In MarketSharp:**

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



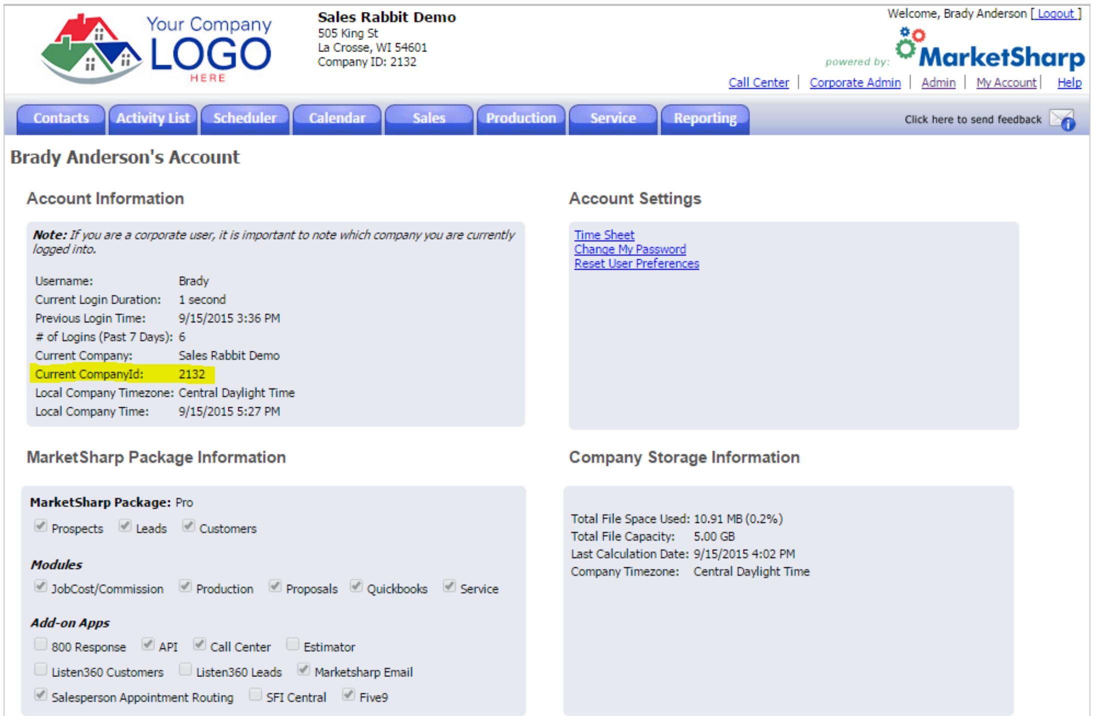

Here you will create the same Lead Statuses that you have in SalesRabbit (Page pictured below) in MarketSharp by clicking on the Yellow Pencil. Model them after the statuses created in the picture above. **The "Form ID" is essential for syncing the statuses, it is just the abbreviation for the Lead Status 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**.




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

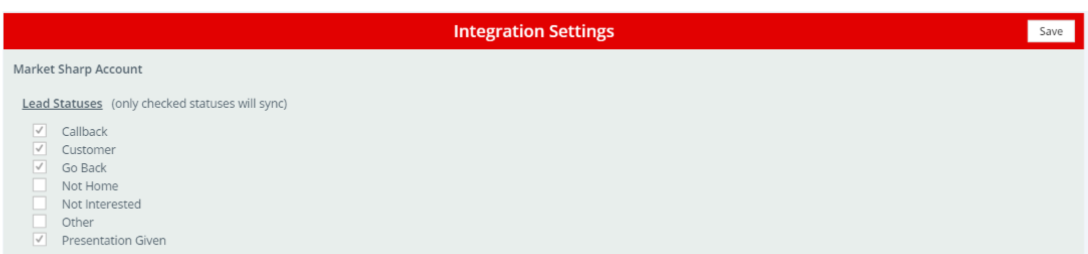
**2. Linking Company Accounts:**

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



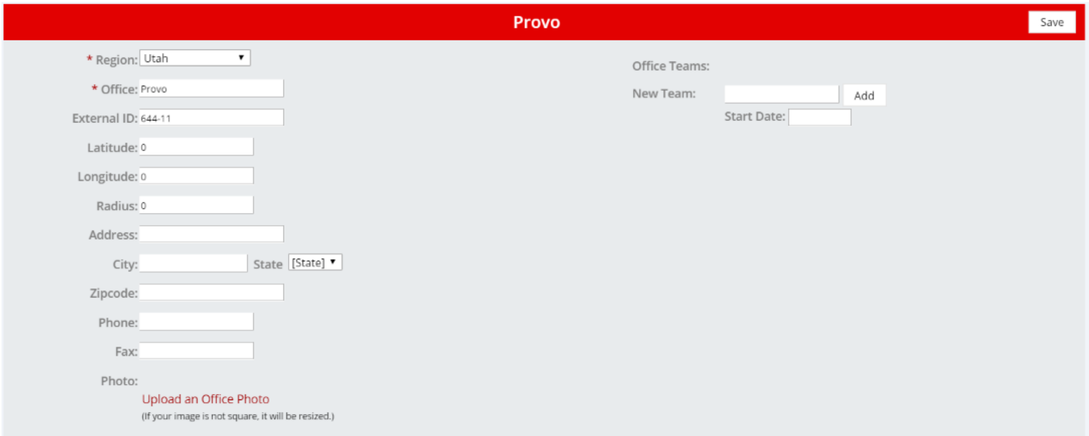

On this page you will need to select the same "**Lead Statuses**" you created in MarketSharp that you are wanting to sync over.

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




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)




**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.

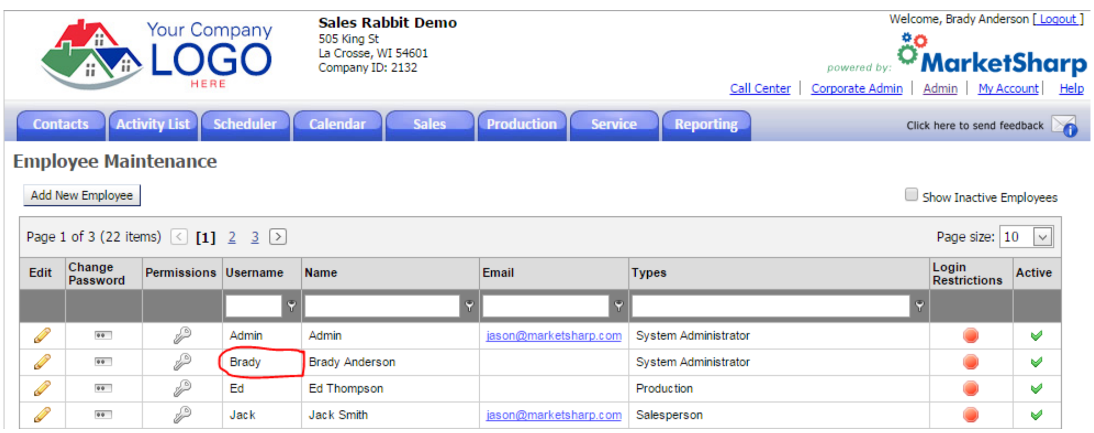
**Attention:** Choose only lead statuses that will contain the **required** lead info fields. (I.e. **FirstName, LastName, and Email or Phone**).

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.

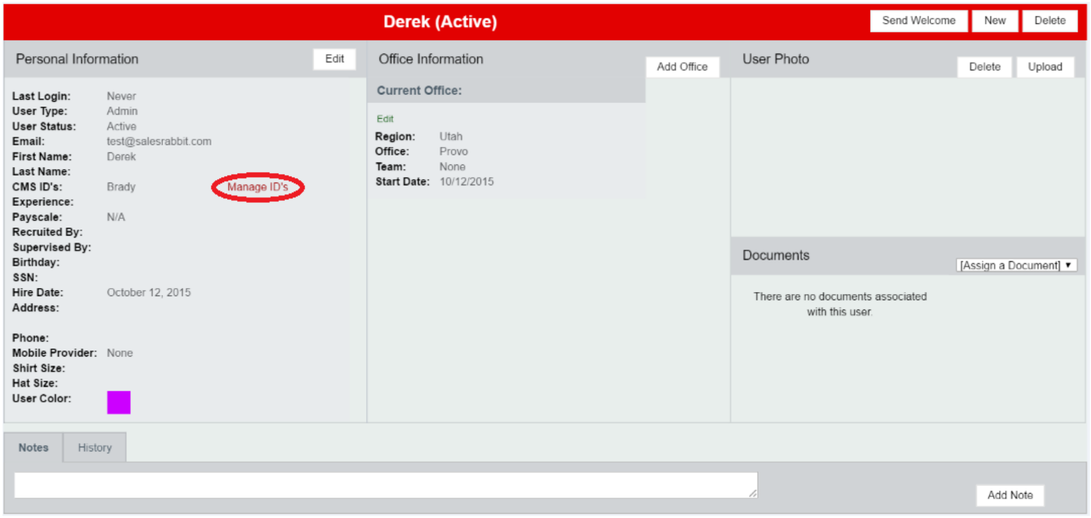
**3. Connecting Users Specifically:**

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

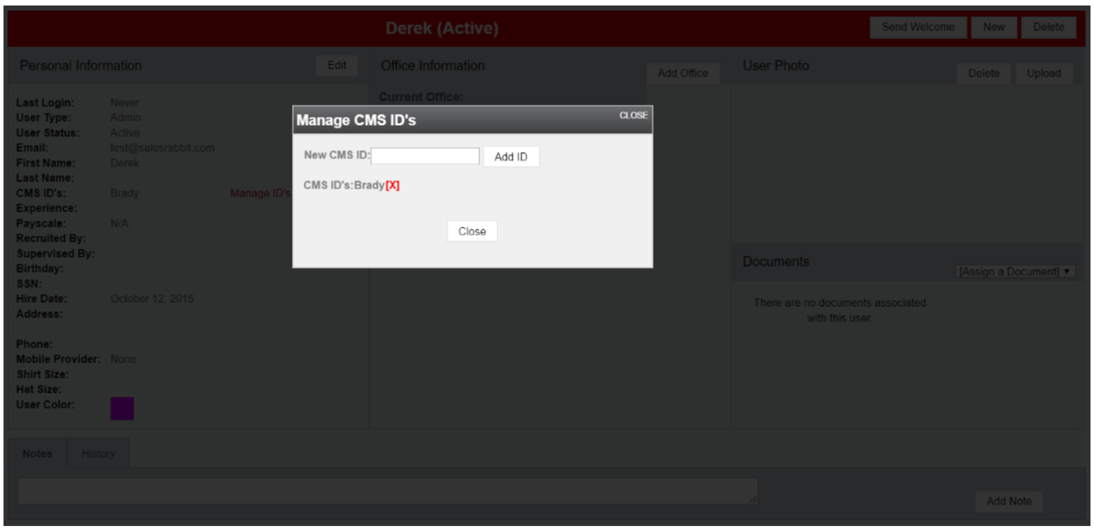



Here you will take "**Username**" from MarketSharp and insert it to the same user's account in Sales Rabbit.

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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