

Setting Up a Marketsharp Integration

Marketsharp Setup

There are three steps to setting up your Marketsharp integration: Office level, Team level, and CRM settings.

Office Level

The office level setup for Marketsharp connects the two main accounts. To access this integration, a user with an Office Admin permission will edit the Office to change the integration option from the default “None” to “Marketsharp”. This will open the fields to enter the username, password, and company ID for the integration.

The screenshot shows a software interface with a sidebar on the left containing 'Color Scheme' and 'Sales Steps', both with 'Use Organization Settings' checked. The main content area is titled 'Integrations' and contains several sections: 'CRM Integrations' with a radio button selected for 'MarketSharp' and three input fields for 'Username*', 'Password*', and 'Company ID*'; 'Payment Integrations' with radio buttons for 'PaySimple' and 'None' (selected); 'Job Integrations' with the text 'Not Available'; and 'Measurement Integrations' with the text 'Not Available'. A red rectangular box highlights the 'MarketSharp' radio button and the three input fields.

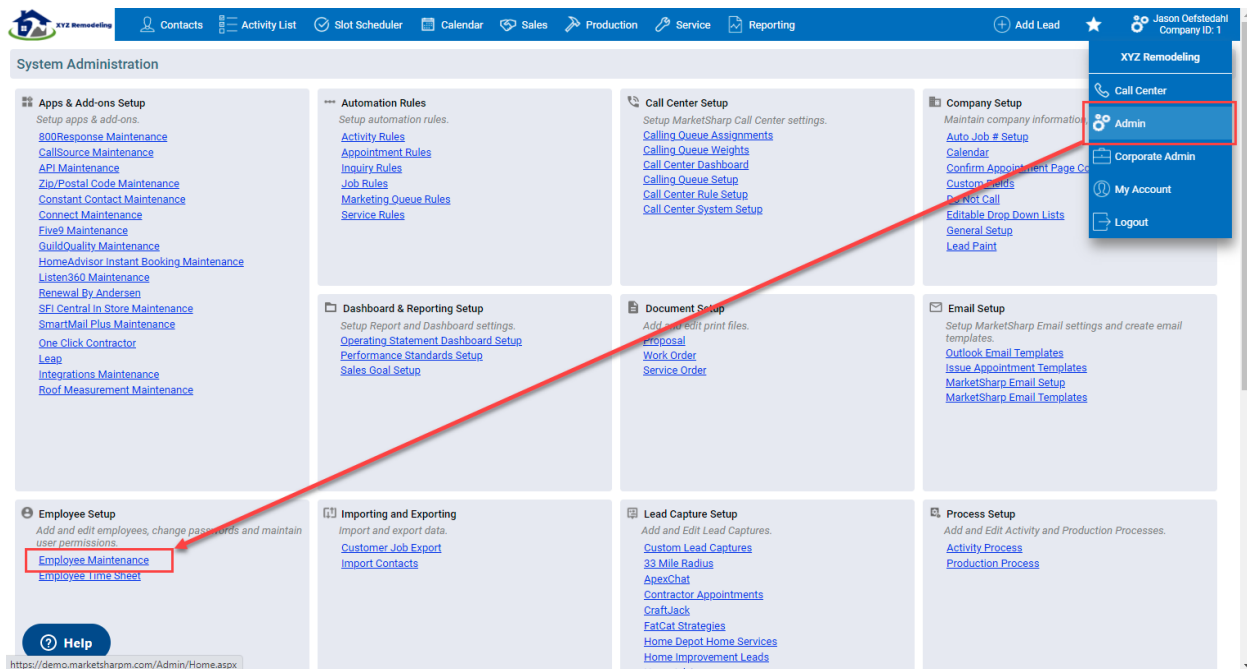
Company ID can be found when the account’s Admin user logs in and looks in the upper right-hand corner where their username is.



Team Level

Each employee has their own ID in Marketsharp which needs to be attached to their user, so their individual appointments are visible in Vendo.

To find this number, navigate to Marketsharp and open the user dropdown in the upper right corner. Select the Admin button. This navigates to a System Administration page. Locate the Employee Setup box and select the Employee Maintenance option.



Employee maintenance contains a list of available employees in your organization. For the users in Vendo, locate their employee record and click on the key image under the Permissions column.

Employee Maintenance

[Add New Employee](#) Show Inactive Employees

Page 1 of 2 (24 Items) Page size: 20

Edit	Change Password	Permissions	Username	Name	Email	Types	Login Restrictions	Active	Locked Out	Mobile Only
Edit	Change Password	Permissions	Admin	Admin	Jason.Oefstedahl@myparadigm.com	System Administrator	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	Ed	Ed Thompson		Production	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	Jack	Jack Smith		Salesperson	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	Jason	Jason Oefstedahl	Jason.Oefstedahl@myparadigm.com	System Administrator	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	Joe	Joe Thomas		Production, Service	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	JoeG	Joe Groth		Production	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	JoeS	Joe Smith		Canvasser, Promoter	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	Justin	Justin		System Administrator	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	JWolters	Jodi Wolters		Call Center	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	keyconnects	Keyword Connects		Telemarketer	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	kheit	Kevin Heit		Salesperson	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	Mary	Mary Smith		Salesperson	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	Michelle	Michelle Nowlan		System Administrator	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	Sam	Sam Patton		Production	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	sparry	Sarah Parry		Canvasser, Promoter	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	susan	Susan Wold		Telemarketer, Call Center	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	tAlbers	Tammy Albers		Telemarketer, Call Center	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	threeeep	Three Deep		System Administrator	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	Change Password	Permissions	Tim	Tim Musch		System Administrator	Login Restrictions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

From here, look to the URL bar in your browser. There will be an “=” sign in the web address. Everything AFTER the equals sign is the employee’s MarketSharp ID.

demo.marketsharp.com/Admin/UserPermissionsMaintenance.aspx?empOid=11

Jason Oefstedahl Permissions (Employee Type: System Administrator)

You will find the Employee ID in the URL. The Employee ID trails the equals sign (=). In this case the Employee ID is 11.

Clone All Permissions From:
 Feature Permissions, List Permissions, View Contact Permissions, View Appointment Permissions, and View Dashboard Items Permissions
 --Reset--

Feature Permissions (Click to View)
 Select which features this employee can see and use throughout the system.

List Permissions (Click to View)
 Select which lists this employee's name should appear in.

Field Permissions (Click to View)
 Select which fields this employee can see and use throughout mobile.

View Contact Permissions (Click to View)
 Limit which contacts this employee can access by designation.

View Appointment Permissions (Click to View)
 Limit which appointments this employee can access by designation.

View Dashboard Items Permissions (Click to View)
 Limit which Dashboard Items this employee can view by designation. Hover over the checkbox to view the Item's description.

[Save Permissions](#) | [Restore Default Permissions](#) | [Cancel](#)

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Copy this string and paste it into the Marketsharp ID field under the User's profile in the Vendo Admin Portal.

The screenshot shows the 'Team' settings page in the Vendo Admin Portal. The left sidebar has 'Team' highlighted. The main content area shows fields for 'Employee ID', 'Status *' (set to 'Active'), and 'Billable *' (set to 'Yes'). Below these is the 'Integrations' section, which contains a 'MarketSharp ID' field highlighted with a red box.

Save the user record and wait at least one hour to verify appointments are connected in the Vendo App.

CRM Settings

To control what results the users see at the end of an appointment, navigate to the CRM menu under Settings. Select your office from the dropdown, then set the appropriate results and result reasons for Won, Lost, Pending, & Cancelled appointments.

Note: The result reasons come from your Marketsharp account and need to be changed/added there.

The screenshot shows the 'Settings' page in the Vendo Admin Portal, specifically the 'Determining Appointment Results and Reasons' section. The page has a breadcrumb trail: Roles > Public API Access > Price Configurations > Price Presentation > Energy Savings > Adders > Promotions > Email Configurations > CRM. The 'Save' button is visible in the top right. Below the breadcrumb trail are two dropdown menus for 'Organization *' and 'Office *'. The main content area is divided into two sections: 'Appointment Results Reasons' and 'Appointment Statuses'. The 'Appointment Results Reasons' section has three rows: 'Won' with 'Demo / Sold' and 'Result Reasons'; 'Lost' with 'Canceled, No Interest' and 'Canceled / Lead, Canceled / Salesperson, P...'; and 'Pending' with 'Demo / Maybe, No Demo, Pending, Reset' and 'Getting Estimates, Lead Not Home, Lookin...'. The 'Appointment Statuses' section has one row: 'Canceled' with 'Canceled'. At the bottom, there is a checkbox for 'Order WCP Quote on resulting as Won?'.