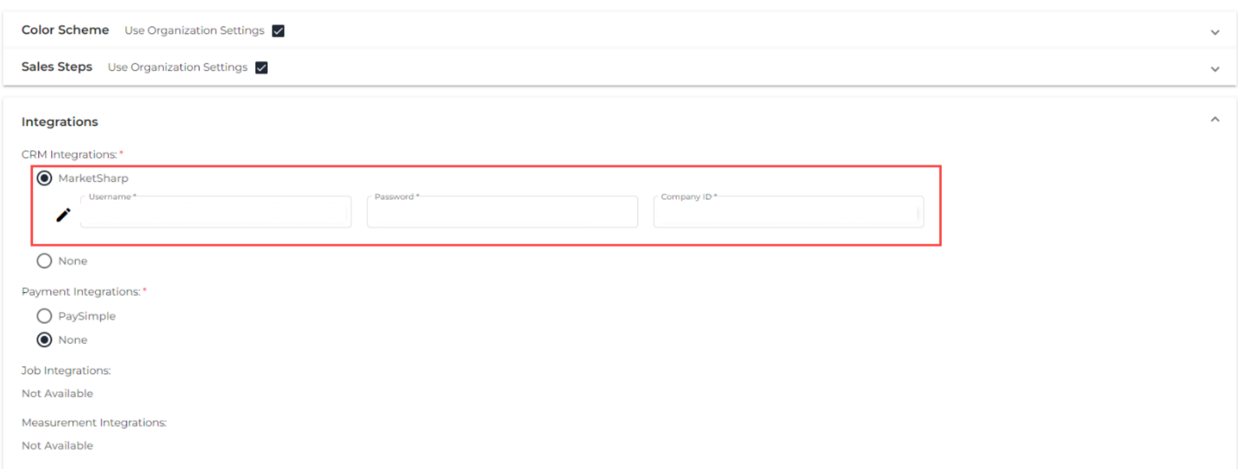
Setting Up a Marketsharp Integration

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.

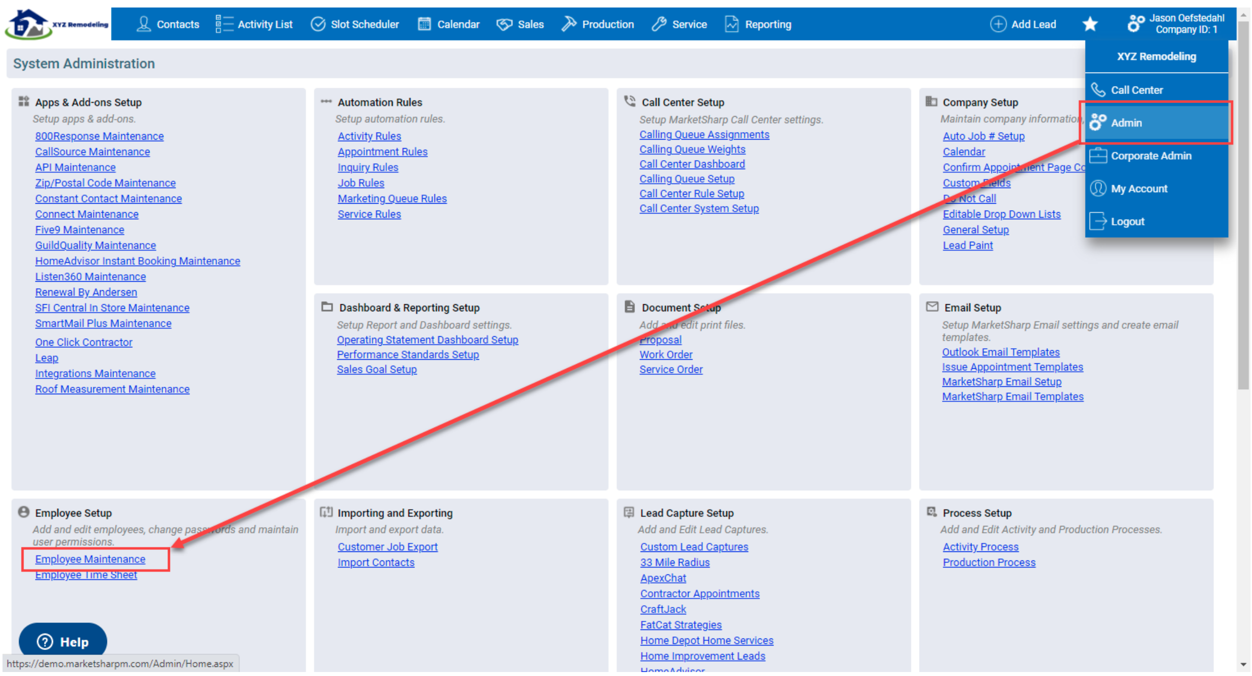


Company ID can be found when the account’s Admin user logs in and looks in the upper right-hand corner where their username is.

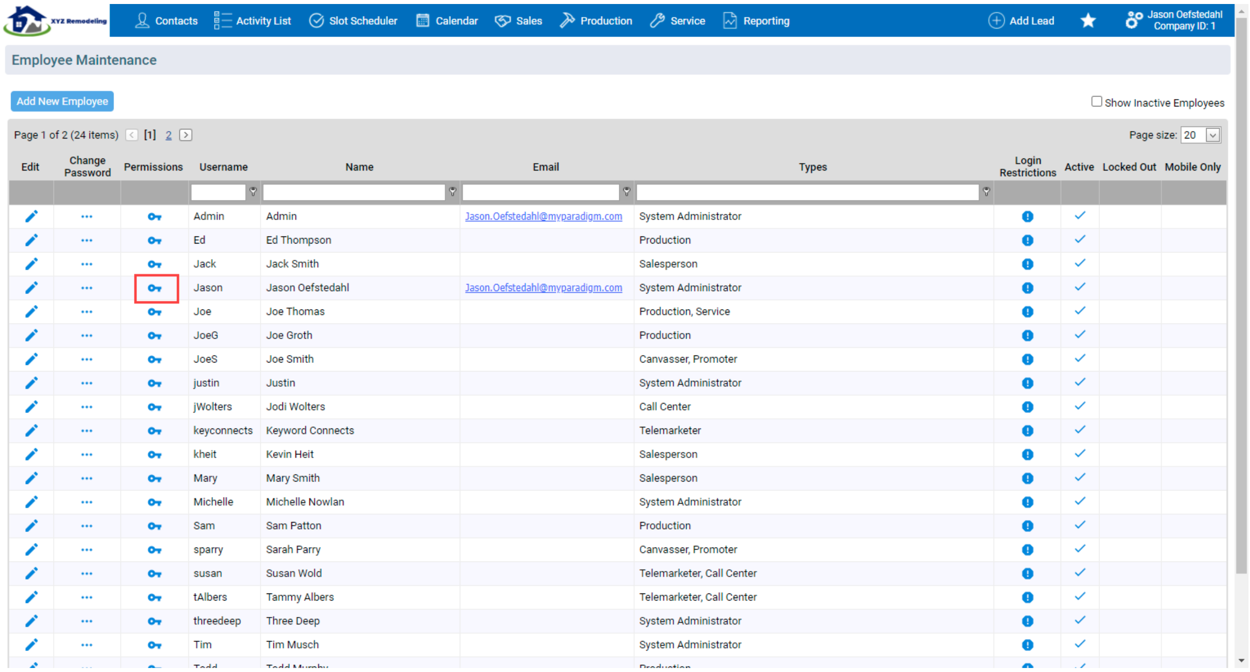
Team Level

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

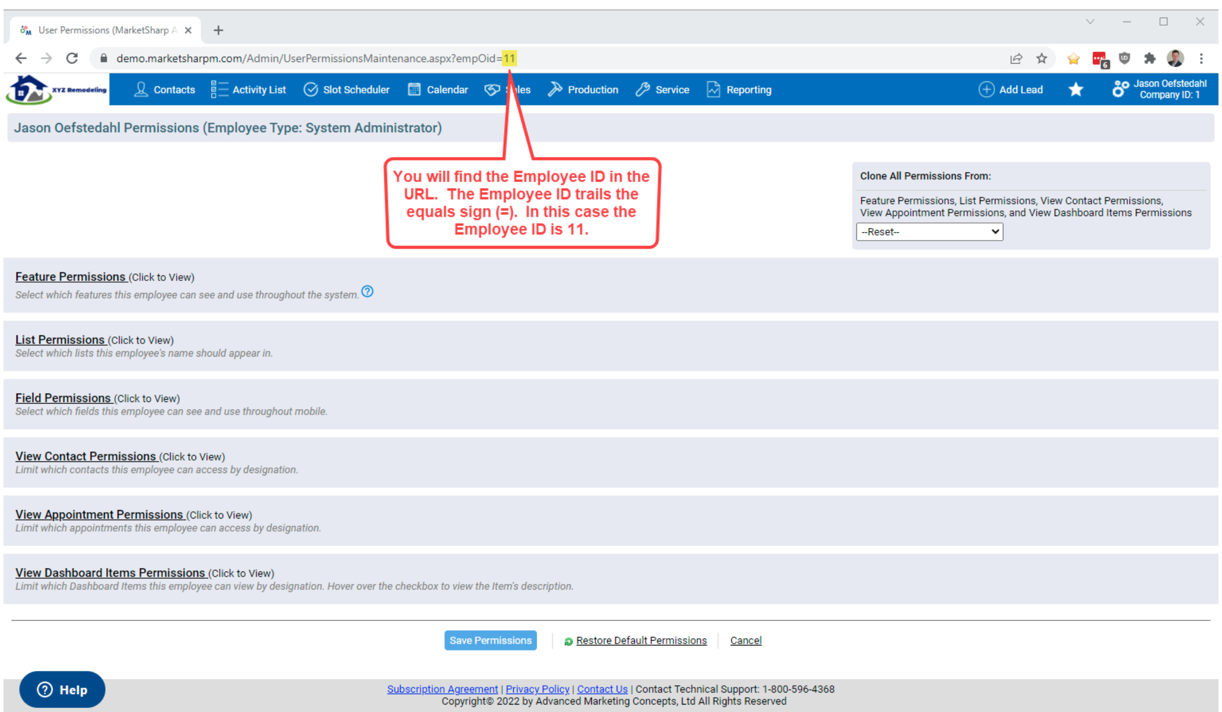
To find this number, navigate to Marketsharp and open the user dropdown in the upper right corner. Select the Admin button. This navigates to a System Administration page. Locate the Employee Setup box and select the Employee Maintenance option.



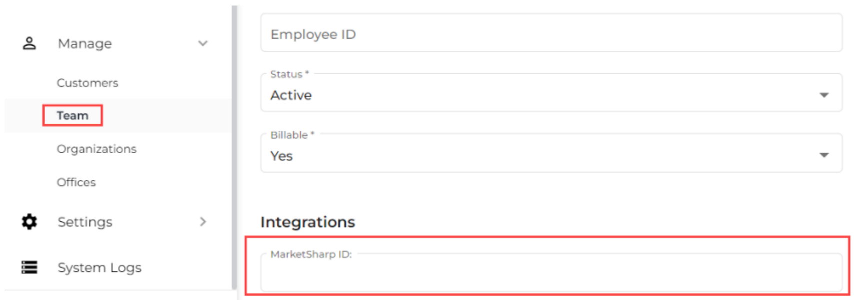
Employee maintenance contains a list of available employees in your organization. For the users in Vendo, locate their employee record and click on the key image under the Permissions column.



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.



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



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.