



# Low Code, No Code, & Custom Integrations

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# Built In Integrations



# Built In Integrations

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## CRM

- Salesforce
- Zendesk Sell
- Dynamics 365
- Sugar
- Netsuite

## Webinar

- Zoom
- Webex
- GoToWebinar

## Email

- Litmus
- Act-On Anywhere for Gmail
- Act-On Anywhere for Outlook

## Other

- Google Analytics
- Bitly
- LinkedIn
- Twitter

Test Started at Sat Oct 15 2022 6:41 AM PDT

Desktop Clients

Apple Mail 13 macOS 10.15	Apple Mail 13 Dark macOS 10.15	Apple Mail 14 macOS 11.0	Apple Mail 15 macOS 12.0	Outlook 2007 Windows 10	Outlook 2010 Windows 10	Outlook 2013 Windows 10	Outlook 2016 macOS 10.12.6	Outlook 2019 120 DPI Windows 10
Outlook 2016 Windows 10	OL Office 365 Windows 10	Outlook 2019 Windows 10	OL Office 365 120 DPI Windows 10	OL Office 365 Dark Windows 10	Outlook 2021 Windows 10	OL Office 365 macOS 10.15	OL Office 365 Dark macOS 10.15	Thunderbird 60 Windows 10

Mobile Clients

Outlook Dark Android 11.0	Gmail App Android 7.1	Gmail App Android 8.0	Gmail App Android 9.0	Samsung Mail Android 7.0	Gmail App Android 10.0	Gmail App Dark Android 10.0	Gmail App Android 11.0	Gmail App Dark Android 11.0
Gmail App iOS 14.2	Gmail App Dark iOS 14.2	iPhone SE (Gen 2) iOS 13.4	iPhone 11 iOS 13.1	iPhone 11 Pro iOS 13.1	iPhone 11 Pro Dark iOS 13.1	iPhone 11 Pro Max iOS 13.1	iPhone 12 iOS 14.2	iPhone 12 Dark iOS 14.2



Sample Preview

You must select recipients to preview personalization.

Validate Message

Test with Litmus

Create New Preview

Last five results:

Test started Sat Oct 15 2022 6:41 AM PDT

Customize email clients

Check Spam Score

Check Account Limits

Check Full Personalization

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# Built In Integrations



## Power-Up Customer Webinar Series - 2022 - Low Code, No Code, & Cu



New URL

### Public URLs

#### Default

Public URL

<https://success.act-on.com/acton/fs/blocks/showLandingPage/a/9883/p/p-0b72/t/page/fm/0>

Short URL

<https://bit.ly/3eufcpz>



Remove



Test

- Litmus
- Act-On Anywhere for Gmail
- Act-On Anywhere for Outlook

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# Built In Integrations

CRMs



# Supported CRMs

The screenshot displays the Act-on CRM interface. On the left is a navigation sidebar with the following items: Home, Contacts, Content, Inbound, Outbound, SMS, Automation, Reports, Settings (with sub-items: Users, Social Media Team, Other Settings), Connectors (highlighted), and Collapse menu. The main content area features a search bar labeled "Search All Contacts" and a user profile for "Erinda Ylli". Below this is a "Connectors" section. A blue-bordered box highlights the "CRM" category in the sidebar, with an arrow pointing to a grid of connector tiles. The tiles include: Salesforce, Zendesk Sell, SugarCRM, Microsoft Dynamics, NETSUITE, webex by CISCO, GoToWebinar, Twitter, LinkedIn, bitly, Google Analytics, Coremetrics (An IBM Company), litmus, Outlook, zoom, and Google Ads.



# Use Cases - Marketer User

## Date Sync

- Bidirectional Profile Data
- Behavior Score
- Opt Out Subscription

## Message Targeting

- Segmentation based on CRM related data
- Personalization of Email and SMS messages using CRM related data

## Reporting

- Funnel reporting based on CRM sales funnels
- Attribution and Impact reporting using Opportunity data from the CRM

# Use Cases - Sales User

## Workflow Management

- See notes created for a lead or contact based on a marketing campaign activity
- Get tasks for follow up activities with engaged leads
- Stay up to date with the campaign membership for your leads/contacts

## Sales Insights

- View activity history for contacts or accounts from the Contact report
- View prioritized leads from the Hot Prospects Dashboard
- See Website engagement for known leads and anonymous visitors

## Messaging

- Send personalized emails to your leads using marketing produced email templates

**In product demo**



# Low Code Integrations

iPaaS Providers



iPaaS Partner	Main Platform Use Case	Website
Blendr.io A Qlik Company	SaaS Integrations	<a href="https://admin.blendr.io/integrations/Act-On">https://admin.blendr.io/integrations/Act-On</a>
Sync Apps by Cazoomi	Marketing & Sales Software Integrations	<a href="https://www.cazoomi.com/search/?search_app_text=Act-On&amp;from_home=yes&amp;app_plan_vertical_drop=">https://www.cazoomi.com/search/?search_app_text=Act-On&amp;from_home=yes&amp;app_plan_vertical_drop=</a>
Zapier	SaaS Integrations	<a href="https://zapier.com/apps/act-on/integrations">https://zapier.com/apps/act-on/integrations</a>
Cdata	Data warehousing, Data visualization, and Data management	<a href="https://www.cdata.com/drivers/acton/">https://www.cdata.com/drivers/acton/</a>
StarFish ETL	Data migration and ERP, CRM & MAP integrations	<a href="https://www.starfishetl.com/connect/Act-On">https://www.starfishetl.com/connect/Act-On</a>
Dataddo	Analytics enablement, Reporting, Data Migration BI tools & Data Warehouses	<a href="https://www.dataddo.com/connector/act-on">https://www.dataddo.com/connector/act-on</a>
Tray.io	SaaS Integrations	<a href="https://tray.io/connectors/act-on-integrations">https://tray.io/connectors/act-on-integrations</a>
KingswaySoft	Data Integration	<a href="https://www.kingswaysoft.com/solutions/ssis-marketing-components/act-on-data-integration">https://www.kingswaysoft.com/solutions/ssis-marketing-components/act-on-data-integration</a>
Leadsbridge	Marketing SaaS Integrations	<a href="https://leadsbridge.com/integrations/act-on/">https://leadsbridge.com/integrations/act-on/</a>
Alumio	Integrations for ERPs and Ecommerce platforms	<a href="https://www.alumio.com/platforms/act-on">https://www.alumio.com/platforms/act-on</a>



*How do I select the right  
iPaaS provider?*



1

## Determine your business problem & use case

- Exchange data
- Automate workflows
- Run reporting & analytics



**1 Determine your business problem & use case**

**2 Consider pricing model**

- Monthly or annual flat fee
- Per record charge
- Per integration cost





**1 Determine your business problem & use case**

**2 Consider pricing model**

**3 User Experience**

- UI integration builder vs technical expertise requirement
- Cloud vs on prem



# Sync Apps by Cazoomi

## Business problem

Exchange contact data and automate workflows with Zoho CRM.

## Use Cases

- Add Zoho CRM contacts to a marketing list in Act-On
- Sync lead scores from Act-On to Zoho CRM
- Sync Act-On Email Campaign metrics back to Zoho CRM
  - Campaigns or Campaign Response custom field
  - Custom Modules
  - ....and many more

## Pricing

Subscription model with 3 tiers. Each tier has access to all integrations but number of records, sync intervals vary by tier, and support varies by tier.

**In product demo**



# Zapier

## Business problem

Grow email list from scheduled sales demos via Calendly or from LinkedIn ads. Calendly and LinkedIn Ads do not have a built-on integration with Act-On.

## Use Cases

- Add contact scheduling demos with sales to an Act-On contact segment/marketing list
- Capture a LinkedIn Ad submission in an Act-On Form list and Google Sheets

## Pricing

- Zapier charges per task and “Zap” (trigger + action)
- Users purchase a number of tasks per month which equate to a record exchange
- Apps may be limited or unlimited based upon the tier you purchase

**In product demo**



# Custom Code Integration

Act-On APIs



# API

## Application Programming Interface

### Data Sync Use Cases

- Bidirectional Profile Data
- Behavior Score
- Campaign Metrics

APIs work best with a single contact list. [Sign up](#) for Act-On's Partner Program to participate in our [All Contacts Beta](#).

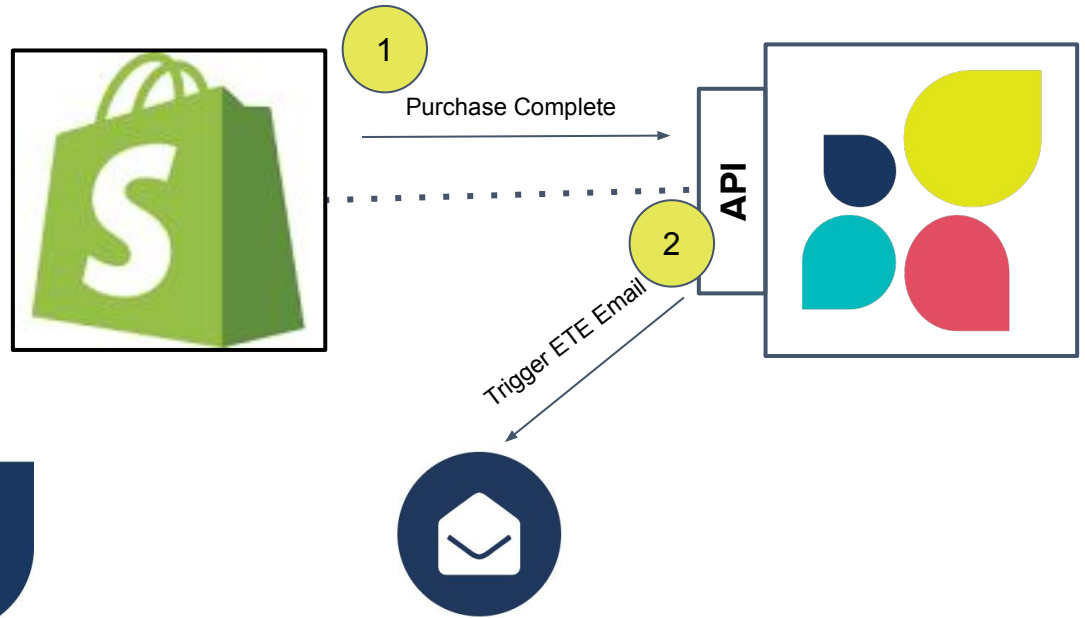
### Effort & Implementation

Requires technical engagement from your developers. We have a [development portal](#) with our API documentation.

Our Professional Services team is happy to help if you do not have a developer!

# API

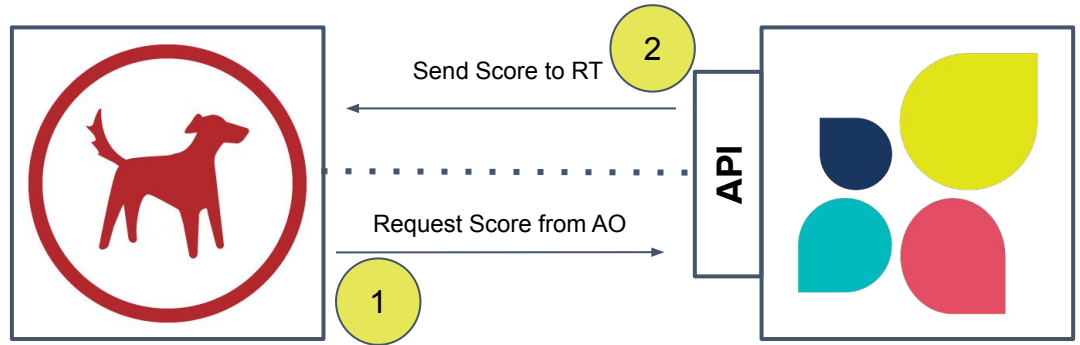
Application  
Programming  
Interface





# API

Application  
Programming  
Interface



# API

Application  
Programming  
Interface

GET

`https://restapi.actonsoftware.com/api/1/list/{listid}/record/{recordid}/facts`

Request Data  
(contacts)

Send Requested Data

# API

## Application Programming Interface

```
{
  "activity": {
    "lastInbound": "Today",
    "ScorePeriod": "all time",
    "lastOutbound": "6 Days Ago",
    "ScoreDetails": [
      {
        "id": "s-0001-1910",
        "idType": "msg",
        "specific": false,
        "profile": false,
        "action": "MESSAGE_SEND",
        "score": 30
      }
    ],
    "score": 30,
    "entries": [],
    "firstOutbound": "7 Days Ago",
    "EntryMonthsAvailable":

```

...



# Documentation

Before you can use the Act-On APIs, you need to [sign up for a free developer account](#), which gives you a fully functional, sandboxed version of Act-On along with access to the external-facing Act-On APIs.

All API calls to Act-On Software should be made to the "https://restapi.actonsoftware.com" base domain. You can learn more about Act-On's API endpoints below.

**Have further questions beyond the documentation?** Take a look at our [frequently asked questions](#) page, which provides answers to some of the most common questions about development with Act-On's API. Check out our [Additional Solutions](#) page for other integration options as well!

<a href="#">Account API</a>	<p>This page summarizes information on the Contact API endpoints that Act-On Software offers to developers and customers.</p> <a href="#">Learn More</a>	<a href="#">Content API</a>
<a href="#">Email Campaign API</a>	<a href="#">Event Triggered Email API</a>	<a href="#">Fact API</a>
<a href="#">List API</a>	<a href="#">OAuth</a>	<a href="#">Reporting API</a>

**1 Platforms and Use Cases for Built In Integrations**

**2 iPaaS Platform Considerations**

**3 Resources for API integrations**



**How you  
can get in  
touch  
with us!**

- Submit [Feature Requests](#)
- Sign Up for [Act-On's Product Partner Program](#)
- Contact Product [erinda.ylli@act-on.com](mailto:erinda.ylli@act-on.com)

**Thank you!**

**Any questions?**

