Marketing Pro Ads Setup Guide: Marketing Attribution Post Calls

The ServiceTitan Marketing Pro team has created a post-call method for you to connect your web booking solution to your ServiceTitan account.

Background

There are a variety of ways that a marketing lead can make its way into ServiceTitan. Web forms, booking schedulers, calls tracking numbers, web chats, and third-party lead aggregators are some of the more commonly used lead capture methods.

ServiceTitan has received two frequent requests from customers with regards to integrating their lead capture sources with ServiceTitan:
- Capture the lead information in ServicTitan
- Have a way to assign the marketing attribution to that lead

To facilitate these requests, we have opened our marketing API to receive leads and their associated attribution information.

To use this, a developer familiar with API post-calls will be required to help build a bridge between your lead generation tool and ServiceTitan.

They will need to follow the following steps:
- Getting developer access to ServiceTitan
- Building an "App" in ServiceTitan, which is essentially the connection between the two platforms
- Designing the App to send information from your lead capture tool into ServiceTitan
- Testing the App in the Integration environment to make sure it's receiving the leads
- Enhancing the integration to also receive marketing attribution data for each lead
- Testing the attribution portion in the Production environment to ensure all information is flowing properly

Whether trying to connect a form software like Gravity Forms, a booking software like Schedule Engine, a chat service like Ruby chat, or a call tracking solution like CallRail, ServiceTitan can receive those leads and bookings and receive all marketing attribution through this method.

Getting started

If you are not familiar with the ST API, read and follow these instructions:

https://developer.servicetitan.io/docs/welcome/
1. Make sure to read "Welcome" through "Get Going"
   a. For making API requests please follow this guide:
      https://developer.servicetitan.io/docs/get-going-first-api-call/
2. Make sure you create an app in both the integration and production environments
3. Make sure to read the CRM reference guide:
   a. https://developer.servicetitan.io/docs/api-resources-crm/

Integrating your web forms

1. To integrate your booking forms (i.e. Schedule Engine), use this endpoint:
   a. https://developer.servicetitan.io/api-details/#api=tenant-crm-v2&operation=Bookings_Create
   b. When setting things up to test, use the "integration" endpoint
   c. When finalizing, use the "production" endpoint
2. To integrate your lead form (i.e. contact form on a website), use this endpoint:
   a. https://developer.servicetitan.io/api-details/#api=tenant-crm-v2&operation=Leads_SubmitLeadForm
   b. When setting things up to test, use the "integration" endpoint
   c. When finalizing, use the "production" endpoint

Adding marketing attribution post calls

Overview: external attribution API

The external attribution api post calls allow integrations to post calls from external tracking software into the Marketing Ads attribution system.

It is assumed that the external software tracks conversions at the visitor level which means that visitor session information is also bundled with calls.

Session information consists of utm parameters, click ids and other parameters which are later utilized by the Marketing Ads attribution system.

The external attribution API post calls are exposed as ServiceTitan Public API V2 endpoints.

Marketing Pro

We have three types of post calls:

1. External Call Attribution - for external call tracking solutions
2. Booking form attribution - for integrated booking request solutions
3. Lead form attribution - for integrated lead / contact forms

Sending attribution post-calls

Important Note: *You can only use the "production" endpoint for marketing attribution*

1. When setting up booking forms, use this endpoint:
   a. https://developer.servicetitan.io/api-details/#api=tenant-marketing-ads-v2&operation=WebBookingAttributions_Create
   b. You will need to use the booking ID for the booking you created in step 2a of integrating web forms (above)
2. When setting up lead forms, use this endpoint:
   a. https://developer.servicetitan.io/api-details/#api=tenant-marketing-ads-v2&operation=WebLeadFormAttributions_Create
   b. You will need to use the lead ID for the lead you created in step 2b of integrating web forms (above)