

Setting up Marketo Integration

October 24, 2013



Introduction

The Marketo / Oktopost integration enables social media lead information to be synchronized with Marketo. Oktopost augments lead records in Marketo by adding detailed source information such as which LinkedIn group, what message, and what campaign was used to obtain the lead. In addition, Oktopost enables tracking click activity from anonymous and existing leads in your Marketo lead database.

Setting up the integration is pretty simple and straight forward. There are 2 levels for the integration:

1. **Basic integration:** Oktopost will sync all incoming social leads with Marketo and augment them with detailed source information
2. **Tracking lead activity (Optional):** If this integration is set-up it will sync with Marketo information on all clicks accumulated from your Oktopost account. Both existing and anonymous leads will be added with activity log information on all clicks coming from social channels

1. Basic Integration

First, you will need to setup a few custom fields in Marketo to store the additional information. To set up the fields, go to the **Admin** section in Marketo and select **Field Management**. Click on the **New Custom Field** button to create the first field. For field type choose *String* and for the field Label write "Okto Click Campaign".

Repeat this step to create all the necessary custom fields:

Type	Name	API Name
String	Okto Click Campaign	OktoClickCampaign
String	Okto Click Group	OktoClickGroup
String	Okto Click Network	OktoClickNetwork
Url	Okto Click Post Link	OktoClickPostLink
String	Okto Click Profile	OktoClickProfile
DateTime	Okto Click Time	OktoClickTime

Once the fields are set-up in Marketo, you will need to setup your API credentials. You can find the relevant information under the Marketo *Admin->Integration->SOAP API*. Fill in the information in Oktopost and save.



2. Tracking Lead Activities

This part of the integration is optional, to set it up you will need to use the Marketo Munchkin API and setup a new CNAME for your domain. To find your **Munchkin Account ID** go to *Admin->Integration->Munchkin* in your Marketo account, make sure to enable the API first if you haven't done so already, copy the API key and paste it in your Oktopost account.

Setting up a new [CNAME](#) for your domain may require a bit of IT knowledge. To set it up you will need to access and edit your domain's DNS records located on your domain registrar's website. Here is a quick guide on how to [setup a new CNAME on GoDaddy](#). The CNAME should be simple, for example: *ok.mywebsite.com*, and the record should direct to **okt.to**. Once set-up, enter the new CNAME in your Oktopost account without the http prefix and save.

This setup will essentially sync all the click activity from Oktopost with your lead database in Marketo. Each click on posts created by Oktopost which leads to your website will add a record with detailed source information to the lead activity log in Marketo, and will enable you to create smart lists in Marketo based on that activity.



Need Help?

The Marketo integration is available from the [Marketing](#) package, and we will be more than happy to assist in implementation. If you would like to implement this integration and are not sure where to start, just contact us at tickets@oktopost.com