



## AdRoll Integration for Marketo Setup Guide

### Summary

The steps to configure your the AdRoll Integration for Marketo are:

1. Obtain a BackStage account and login credentials
2. Configure your Marketo account in BackStage
3. Add the backstage.js snippet on your page
4. Create AdRoll segments (or use existing segments)
5. Configure BackStage audiences and classification rules

### Setup Details

#### Obtain a BackStage account and login credentials

FunnelEnvy will setup your account on BackStage, and generate your login and password which will be emailed to you.

#### Enter your account API credentials for Marketo

Once you have a BackStage account, login and click on the 'Configure' accounts tab. There you'll be able to enter and save your API keys and credentials for Marketo.

A screenshot of the Marketo Account configuration page. The page has a light gray background. At the top left is the Marketo logo (a blue bar chart) and the text "Marketo Account". Below this are three input fields: "API Client Id", "API Client Secret", and "User ID". Each field contains a blurred, illegible string of characters. To the right of the "API Client Id" field is a green "Save" button.

## Obtaining Marketo Credentials

### User Id

Load the Account page by clicking your account name, and then “My Account”.

Navigate via the sidebar Admin > Integrations > Web Services

The User Id is located in the Soap API Box

### API Client Id

Follow the section “How to Generate an Authentication Token” in the following guide. :

<http://developers.marketo.com/blog/quick-start-guide-for-marketo-rest-api/>

Load the Account page by clicking your account name, and then “My Account”.

Navigate via the sidebar Admin > Integrations > Service.

The Client Id is located in the popup when clicking “Details” of your chosen API user.

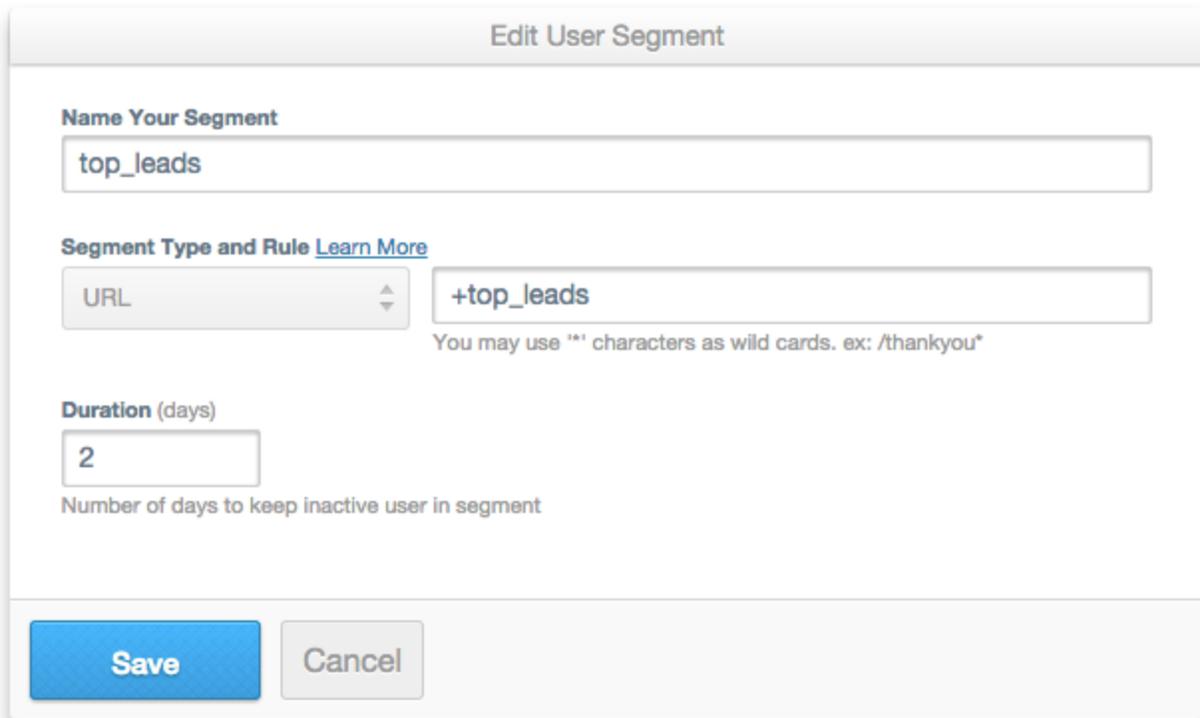
### API Client Secret

Like the Client Id, the Client Secret is located in the popup when clicking “Details” of your chosen API user.

### **Add the backstage.js snippet on your page**

Click on the “Code” tab in BackStage. You’ll see a popup with the Javascript snippet for your account. This snippet will need to be inserted into your site where the AdRoll SmartPixel is installed.





**Edit User Segment**

**Name Your Segment**

top\_leads

**Segment Type and Rule** [Learn More](#)

URL +top\_leads

You may use "\*" characters as wild cards. ex: /thankyou\*

**Duration (days)**

2

Number of days to keep inactive user in segment

**Save** **Cancel**

### Creating a New Segment

To create a new segment, visit the main adroll dashboard (<https://app.adroll.com/dashboard>), and click the "Segment Visitors" button, and an empty dialog similar to the one above will appear.

### Modifying an Existing Segment

Please note: In order to modify an existing segment, it MUST NOT be targeted by any ad campaigns.

1. From the main adroll dashboard (<https://app.adroll.com/dashboard>), click the "Segments" button near the bottom. You will be presented with a list of existing segments.
2. Click the Segment that you would like to modify. You will be presented with a popup dialog.
3. Click the "Edit" button next to the segment name.
4. Edit as described above.

### **Configure custom audiences and classification rules**

Head over to the "Audiences" tab in BackStage. Here you'll be able to create your custom audiences as well as add classification conditions to associate Marketo lead attributes with these audiences. You can multiple conditions and condition groups, creating arbitrarily complex rules as necessary for your business requirements.

Any visitor that meets the criteria for a BackStage audience can be added to an AdRoll segment. In order to tie an audience to an AdRoll segment populate the “AdRoll Segment Name” accordingly.

The screenshot shows the configuration for an audience named "Audience: High Lead Score". The criteria are "Visitors with a lead score greater than 100". The "AdRoll Segment Name" field is highlighted with a red box and contains the value "top\_leads". Below this is a "Conditions" section with a "+ Add Condition Group" button. A single condition is defined: "LeadScore" is greater than "100". There is a "+ Add New Condition" button at the bottom of the conditions list.

**Audience: High Lead Score**

Visitors with a lead score greater than 100

**AdRoll Segment Name**

top\_leads

Conditions + Add Condition Group

LeadScore is greater than 100

+ Add New Condition

★ BackStage Audiences Configure Accounts User Settings <> Code Logout

## My Audiences + Add New Audience

- High Lead Score**  
Visitors with a high lead score
- CEOs**  
Visitors with CEO in their title
- Health Care Marketing**  
Visitors in the Health Care industry with Marketing in their Title
- Webinar Attendees**  
Lead Source is Webinar

That's it! When a user visits your site and is part of a BackStage audience, they will be added to the configured AdRoll segment.