

Conversica Marketo Setup Guide

Version 1.5

11/12/15

A. Before Installation

Before beginning the installation, please make sure that:

- You have Admin permissions on your Marketo system.
- Your Conversica account is provisioned and ready for use.
- You have established contact with your Conversica Account Manager

B. Enable the REST and SOAP APIs in Marketo

REST API

Follow the steps in <http://developers.marketo.com/blog/quick-start-guide-for-marketo-rest-api/> and then provide your Conversica account manager with the following information (Note: When creating a new API Roll in step 3, Conversica will only need permission to access Read-Write Lead):

- Client Id
- Client Secret
- Authorized User
- Token generated (as shown in step 7)
- REST API Endpoint URL (as shown in step 8)
- Identity URL (as shown in step 8)

SOAP API

Follow the steps in <http://developers.marketo.com/documentation/soap/> and then provide your Conversica account manager with the following information:

- SOAP API Endpoint
- SOAP API User ID
- SOAP API Encryption Key

C. Create Custom Fields in Marketo

Create the following fields in Admin > Field Management:

(To create the new fields, click New Custom Field, enter the information below and click Create for each.)

- If you need to sync Conversica’s field values between Marketo and Salesforce, please refer to Appendix A for the proper field naming scheme.

Required Fields

Friendly Label	Type	REST API Name
Conversica Conversation	Text	conversicaConversation
Conversica Discovered Phone 1	Phone	conversicaDiscoveredPhone1
Conversica Discovered Phone 2	Phone	conversicaDiscoveredPhone2
Conversica Do Not Email	Boolean	conversicaDoNotEmail
Conversica Hot Lead	Boolean	conversicaHotLead
Conversica Lead At Risk	Boolean	conversicaLeadAtRisk
Conversica Action Required	Boolean	conversicaActionRequired
Conversica Hot Lead Date	Datetime	conversicaHotLeadDate
Conversica Lead At Risk Date	Datetime	conversicaLeadAtRiskDate
Conversica Action Required Date	Datetime	conversicaActionRequiredDate
Conversica Most Recent Response	Text	conversicaMostRecentResponse
Conversica Status	String	conversicaStatus
Conversica Stop	Boolean	conversicaStop
Conversica Skip To Follow Up	Boolean	conversicaSkipToFollowUp

Lead Owners:

The following fields need to exist in Marketo as well. In order for us to pick up on the correct lead owner, you can create triggers from the standard lead owner fields in Marketo that update the Conversica lead owner fields.

Conversica Lead Owner Email	Email	conversicaLeadOwnerEmail
Conversica Lead Owner First Name	String	conversicaLeadOwnerFirstName
Conversica Lead Owner Last Name	String	conversicaLeadOwnerLastName

D. Connect Marketo to Conversica

At this point, you should notify Conversica that it is time to connect the two systems using the REST API. Please contact your Technical Account Manager to complete this step.

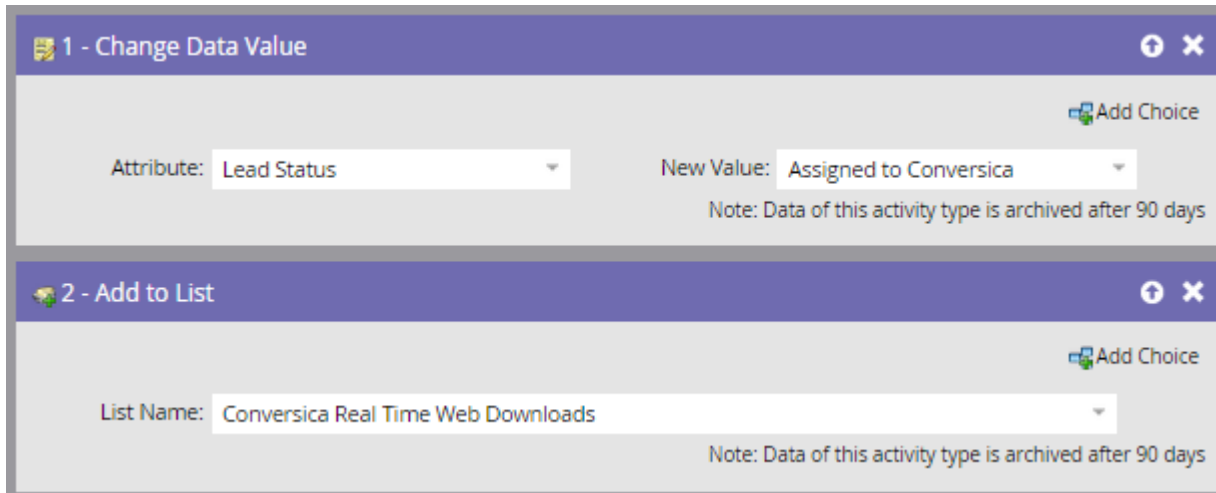
E. Create Static Lists

Leads are synced with Conversica through static lists in Marketo. Adding a lead to a list sends that lead to Conversica to be engaged. The name of the list in Marketo should match the corresponding Conversica dialogue.

In the Marketo Lead Database tab, select New and then choose New List. Create a static lead list for each of your Conversica dialogues. Provide the URLs of your lists to your technical account manager so they can be connected to the correct campaigns in Conversica.

F. Setup Smart Campaigns to Add Leads to Your Lists

In your desired Smart Campaign, simply add a flow step of “Add to List” and select the Conversica conversation list you already created. In this example, we set the lead status to “Assigned to Conversica” and then add the lead to the list.



The screenshot shows two flow steps in a Marketo Smart Campaign:

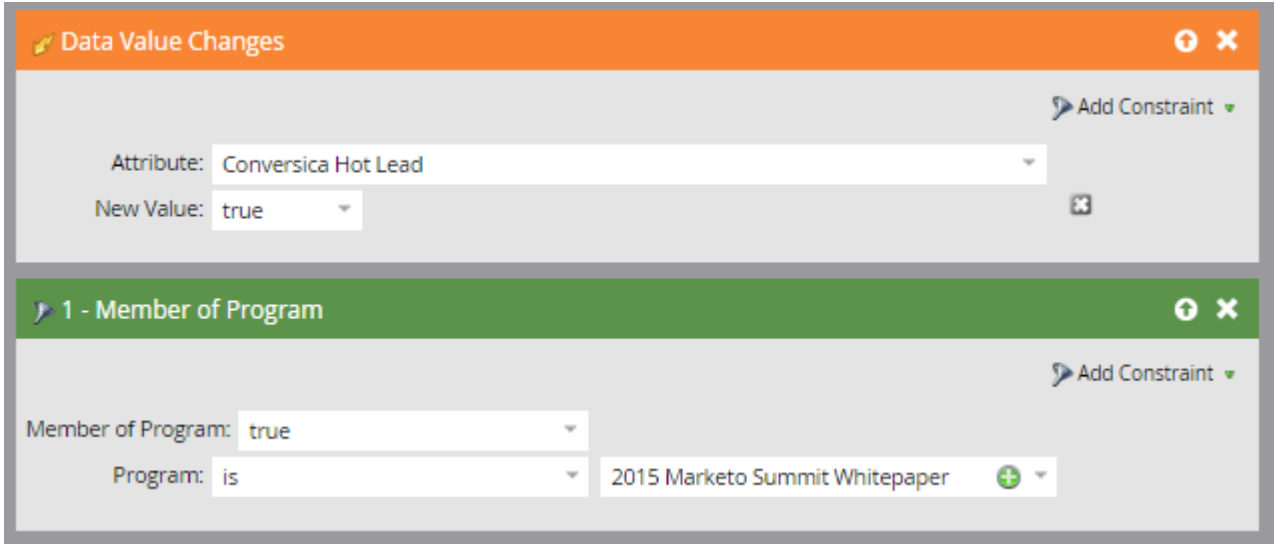
- Step 1: Change Data Value**
 - Attribute: Lead Status
 - New Value: Assigned to Conversica
 - Note: Data of this activity type is archived after 90 days
- Step 2: Add to List**
 - List Name: Conversica Real Time Web Downloads
 - Note: Data of this activity type is archived after 90 days

G. Setup Smart Campaigns to Listen for Status Updates

Use a Data Value Changed trigger to listen for the Conversica Hot Lead field to become true. Then, take appropriate action like send alerts and updating lead status.

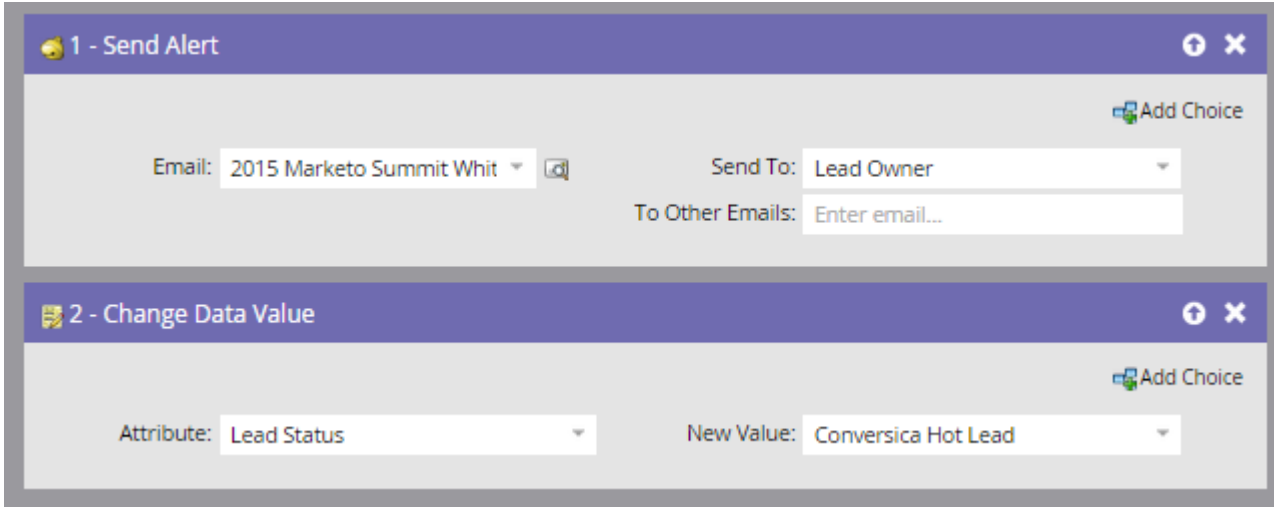
In this example, we look for the Conversica Hot Lead status to become true for members of a specific program, and then we send an alert to the lead owner and change the status to “Conversica Hot Lead.”

Smart List:



The screenshot shows two configuration panels for a Smart List. The top panel, titled "Data Value Changes", has an orange header and contains a dropdown for "Attribute" set to "Conversica Hot Lead" and a dropdown for "New Value" set to "true". The bottom panel, titled "1 - Member of Program", has a green header and contains a dropdown for "Member of Program" set to "true", a dropdown for "Program" set to "is", and a text input field containing "2015 Marketo Summit Whitepaper". Both panels include an "Add Constraint" button.

Flow:



The screenshot shows two configuration panels for a Flow. The top panel, titled "1 - Send Alert", has a purple header and contains an "Email" dropdown set to "2015 Marketo Summit Whit", a "Send To" dropdown set to "Lead Owner", and a "To Other Emails" text input field. The bottom panel, titled "2 - Change Data Value", has a purple header and contains an "Attribute" dropdown set to "Lead Status" and a "New Value" dropdown set to "Conversica Hot Lead". Both panels include an "Add Choice" button.

H. [Contact Conversica for Support](#)

Should you have any questions or issues, please don't hesitate to connect with your account manager, email support@conversica.com or call (888) 633 7738.

Appendix A

If you have an integration between your Marketo and Salesforce instance, the following is required if you would like information to sync back with Salesforce.

The following custom fields must be created in Salesforce with the given API name and synced to Marketo. These field names must use the same naming scheme as stated in the table below.

Required Fields

Friendly Label	Type	REST API Name
Conversica Conversation	Text	conversicaConversation__c
Conversica Discovered Phone 1	Phone	conversicaDiscoveredPhone1__c
Conversica Discovered Phone 2	Phone	conversicaDiscoveredPhone2__c
Conversica Do Not Email	Boolean	conversicaDoNotEmail__c
Conversica Hot Lead	Boolean	conversicaHotLead__c
Conversica Lead At Risk	Boolean	conversicaLeadAtRisk__c
Conversica Action Required	Boolean	conversicaActionRequired__c
Conversica Hot Lead Date	Datetime	conversicaHotLeadDate__c
Conversica Lead At Risk Date	Datetime	conversicaLeadAtRiskDate__c
Conversica Action Required Date	Datetime	conversicaActionRequiredDate__c
Conversica Most Recent Response	Text	conversicaMostRecentResponse__c
Conversica Status	String	conversicaStatus__c
Conversica Stop	Boolean	conversicaStop__c
Conversica Skip To Follow Up	Boolean	conversicaSkipToFollowUp__c

Lead Owners:

Conversica Lead Owner Email	Email	conversicaLeadOwnerEmail__c
Conversica Lead Owner First Name	String	conversicaLeadOwnerFirstName__c
Conversica Lead Owner Last Name	String	conversicaLeadOwnerLastName__c