

# Marketo Integration via Segment

## Getting Started

If you don't have an account with Segment, click [here to sign up](#).

When you enable Marketo via Segment,

- Our CDN is updated within 5-10 minutes. Then our snippet will start asynchronously loading Marketo's Munchkin onto your page. This means you should remove Marketo's snippet from your page.
- Marketo will start automatically recording visitor information.

### Important Note:

Our client-side and server-side integrations each require **different** credentials for authentication. Please read through the information below on `identify` calls for further information.

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## Page and Track

### Client Side

When you call `page` or `track` in Analytics.js, we call Marketo's `visitWebPage` with the URL you provide. We'll truncate and split the URL into the form Marketo expects, so no need to worry about doing that yourself.

## Identify

### Client-side

When you call `identify` on Analytics.js, we call Marketo's `associateLead`. Marketo **requires an email address** for this function, so if the `traits` object you include in `identify` doesn't have an email, the request won't go through. Marketo's client-side library, [Munchkin](#), **requires your API private key** for authentication along with your email, so please ensure that you have provided it in your Segment settings.

```
analytics.identify('1234', {
  email: 'friends@segment.com',
  name: 'Jake Peterson',
  company: 'Segment',
  favoriteColor__c: 'Blue'
});
```

In order to properly sign the `associateLead` request while keeping your account and data secure,

we make a request to our API that calculates the appropriate SHA1 security hash for the user you're identifying. We use this hash to sign the `associateLead` request to Marketo.

Check out the [trait naming](#) section below for more information about trait naming and the transformation that we do.

## Server Side

When you can `identify` with a `traits` object on any of the server-side languages, we make a call to Marketo's `syncLead` SOAP API action. This call either creates or updates `traits` on a lead based on the email address either in `userId` or `traits.email`. Note that leads can only be synced every 30 seconds via the SOAP API. Our server side integration with Marketo **requires your encryption key** along with your email for authentication, please ensure you have provided it in your Segment settings.

Remember to provide an email with every call as either the `userId` or as a trait labeled "email". Here's a java example of that:

```
Analytics.identify("hj2kf92ds212",
    new Traits()
        .put("email", "tom@initech.com")
        .put("name", "Tom Smykowski"));
```

Marketo uses cookies to keep track of visitors and their sessions while visiting your website. The cookie data is stored in the visitor's browser, and is sent along to Marketo every time a new event occurs. This allows them to show a single unique lead between multiple page reloads.

Your servers also have access to this cookie, so they can re-use it when you send server-side events to Segment. If you don't use the existing cookie Segment will use either the `userId` or `sessionId` to make the server-side request to Marketo. When we create a new cookie, the client-side and server-side events from the same user will look like two distinct leads when viewed in Marketo. The cookie takes precedence over all other keys, so if you send both the cookie and the `userId` - the cookie will match first and the `userId` for that lead will be updated.

To associate leads in server-side Marketo, there are currently three options with Segment:

1. Pass your Marketo cookies to Segment.
2. Use the `userId` or `sessionId` when associating leads in Marketo.
3. Ignore the additional visitors generated by passing different types of ids for each call (i.e. cookie once, then the `userId` for the same user the second time).

If you choose to pass the cookie with your calls, it will look like this:

```
id:561-HYG-937&token:_mch-marketo.com-1374552656411-90718
```

If you want our server-side integration to use your user's Marketo Cookie, pass it to us in the

`context['Marketo'].marketoCookie` object.

Here's a Ruby example:

```
Analytics.identify(  
  user_id: '019mr8mf4r',  
  traits: {  
    firstName: 'Jake',  
    lastName: 'Peterson'  
  },  
  context: {  
    'Marketo' => {  
      marketoCookie: 'id:561-HYG-937&token:_mch-marketto.com-1374552656411-90718'  
    }  
  }  
)
```

*Important:* If you choose to use the cookie approach, make sure to send the cookie along in your `track` calls as well, as Marketo will need it on subsequent calls to tie activity to that user.

For more information about synchronising your Marketo leads, please visit their documentation [here](#).

## Trait Naming

By default, Marketo accepts the standard Salesforce Lead fields like `Email` and `Phone`.

Because our API prefers the camelCase formatting for traits, we will transform your field names by removing spaces, and uppercasing the first letter to match Marketo's Pascal trait standards.

- `email` => `Email`
- `a field` => `AField`

If you have a Marketo custom field called `CompanyDunsNumber`, you should send it to us as `companyDunsNumber`. Please note that custom fields starting with a lowercase letter won't work.

## Support

If you need help, please email Segment at [friends@segment.com](mailto:friends@segment.com).