

Marketo Marketing Automation connector

Integration Guide

The Marketo® [add-on](#) automatically exports form data from your website to your Marketo account database by mapping Episerver form fields to Marketo database fields. For information about other Episerver add-ons, see [Episerver Connect for Marketing Automation](#).

You need a separate license to install Episerver Connect for Marketing Automation with Marketo into the Episerver user interface or into your Visual Studio environment. Also, you can use *only one* marketing automation product at a time. See [Episerver World](#) for details about installation and configuration.

1. Log into the Episerver site and establish a connection with Marketo.
 1. Open the [global menu](#) and click **Marketo**. The Marketo configuration settings screen appears.

—Image: Marketo configuration screen—

2. Enter the following information.

REST authentication

- **Endpoint URL.** Instance of Marketo used by the organization.
- **Client ID.** ID for authentication provided by Marketo.
- **Client secret.** ID for authentication provided by Marketo.

SOAP authentication

- **Endpoint URL.** Instance of Marketo used by the organization.
- **User ID.** ID for authentication provided by Marketo.
- **Encryption key.** ID for authentication provided by Marketo.

Web tracking code. Custom tracking script from Marketo to be injected to the pages to track visitors.

3. Click **Save**.

2. Select **CMS > Edit** to access pages on your website. You can create a new form to a block or a page (depending on your configuration). The following instructions describe creating a form in a new block.

3. On a page, create a form in Episerver and connect to Marketo. See [Using forms](#).

—Image: New form—

4. Click **Browse** next to the Form field. The Select Form screen appears.

5. Select Marketo Database from the **Folder** drop-down menu at the top of the dialog box. The dialog box contents change.

6. Click **Create** to start a new form. The Edit form screen appears.

1. **Name of form.** Give the form a name.

2. **Form folder. Engage DB: [0] Marketo Database** is the only value available.

3. **Page shown after the form has been sent.** Choose an existing page to display when a visitor submits the form.

4. **Form can be sent without logging in.** Enable to let the visitor submit the form without having login credentials.

5. **Same person can send the form several times.** Enable this to permit multiple form submissions.

7. Select **Table Layout > Add Row** for as many fields as you want to display on the form.

8. From the **Form Fields** tab, select a row and select the type of field that you want. The Properties pane appears. The following image shows a Text box selected to create a field for an email address.

—Image: Edit form—

1. The **Name** field in the Properties pane lists the Marketo database fields to which you map the field on your form. For example, **email** to Email, **First Name** to FirstName, **Last Name** to LastName, and so on.

You must have one field mapped to the Marketo email database field; other fields are optional. You can map 1 Episerver form field to only one Marketo field. For example, you cannot map both Episerver **email1** and **email2** fields to the Marketo **Email** database field.

2. If a field requires validation, select the validation type from the **Validate as** field. For example, a zip code should be positive integers only; you do not want the visitor to specify text.
3. Repeat this step for each field on the form. Be sure to add a **Submit** button so the contact information gets sent to the Marketo database.
9. Click **Save and Close**. The new form appears in the Select Form screen.

—Image: new form displayed in Select form—

10. Select the form and click **Use** to add the form to a page or a block.

Retrieving contact data

When a visitor submits the form, the data is sent to the Marketo database. To see who submitted the form, go to **Marketo > Lead Database > All Leads** and select the contact list.

Personalizing the form using a block

You can personalize and target messages based on profile information collected through the Marketo integration. You can apply personalization forms, blocks, and dynamic content. Mailings are managed within Marketo.

You can personalize a form to show only to a selected group of people. The following image shows personalizing a form to show only for people in the *Swedish profiles* visitor group. For more information about creating a visitor group and displaying information based on a visitor group, see [Personalizing content](#) and [Visitor groups](#).

—Image: personalize form—

Personalization using dynamic content

Personalize using dynamic content as follows:

1. Create or edit a page in Episerver CMS.
2. Add a piece of existing [Adding dynamic content](#) in the rich-text editor area of the page.
3. Select to edit the dynamic content. In **Type**, click **Personalized Content**.

4. Select a form. In **Folder:/**, select the Marketo database.
5. Drag a field into **Drop fields here** area, for example, **Country**.
6. Click **OK** to insert the dynamic content to the rich-text editor.
7. Save your changes.

Creating a visitor group for a Marketo form

The Marketo add-on integrates Marketo web tracking to Episerver's personalization engine by identifying a visitor via the `_mkto_trkcookie`.

The following sets of visitor group criteria let you personalize your website content in Episerver CMS:

- **Profile**. Identifies a visitor against metadata stored in Marketo.
- **Scoring Model**. Identifies a visitor based on scores against specific Marketo scoring models.

When you set up criteria in a visitor group, the fields do not automatically populate with values. You must supply these yourself. Ensure that a field you create matches the type of field from the connector provider.

To create a visitor group, you can combine criteria, such as a geographic location and the scoring model criteria in Marketo. See [Visitor groups](#) for information about creating visitor groups.

Defining visitor groups for Marketo forms

Profile criteria

1. Create a form block and a form.
2. Save the form to a folder in the Marketo database.
3. Drag the form block to the page in your campaign or program, and publish it at the appropriate time.
4. In Episerver CMS > **Visitor Groups**, create a visitor group using the **Profile** criteria. In this example, the desired visitors for the campaign or program have a profile

containing **Sweden** in the **Country** column. A contact with this value is added to the Marketo database.

Profile	Database	Marketing Databas
	Column	Country
	Condition	equals
	Value	Sweden

Scoring model criteria

Marketo uses a simple scoring model of the total score for a contact (called **Lead Score**), which you can change by a flow action in a smart campaign.

1. In Episerver CMS > **Visitor Groups**, create a visitor group using the **Scoring Model** criteria.
2. Create a form block and a form.
3. Save the form to a folder in the Marketo database.
4. Drag the form block to the page in your campaign or program, and publish it at the appropriate time.

When a contact has entered a specific form field, Marketo adds a value to its database, (determined by the scoring model you set up, such as Scoring001_Score= 10).

You can combine the **Profile** and **Scoring Model** criteria to select, such as visitors from Sweden with a total score over 10.

Profile	Database	Marketing Databas
	Column	Country
	Condition	equals
	Value	Sweden

Scoring Model	Model	Test_ScoringMode
	Score Type	Total Score
	Compare Condition	more
	Score	10