# SYNC

## Table of Contents

# MSync: The Marketo Forms and Lead Plugin for WordPress

Thank you for downloading MSync, the new Marketo plugin for WordPress. MSync integrates Marketo forms within WordPress and allows the user to take advanced actions on lead tracking data with ease. The forms are native, pure PHP and are secure. The lead data actions result in a streamlined process for your sales and marketing staff.

The following is now possible:

- Embed munchkin.js to track leads
- Modify lead data before sending to Marketo
- Push leads to Marketo automatically
- Drag/Drop, Add, Change custom fields
- Embed forms

Simply put, MSync is the easiest and most efficient way to perform these actions directly within WordPress.

Getting started is easy! Just follow the instructions below:

## Installing MSync

1. Go to Plugins page in WordPress
2. Select "Add New"
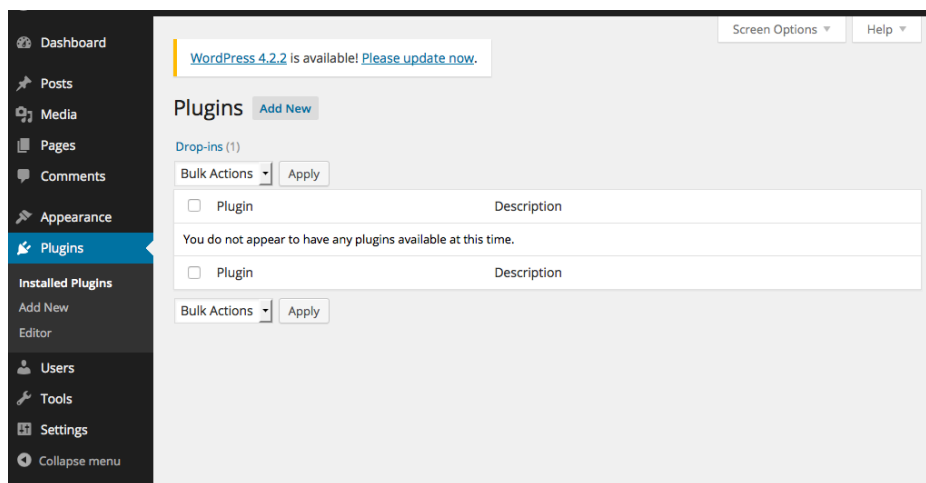


3. Select "Upload"
4. Browse for and select "msync.zip"
5. Click "Install"

6. Activate plugin



**Installing Plugin: MSync 1.0.0**

Unpacking the package...

Installing the plugin...

Successfully installed the plugin **MSync 1.0.0**.

Activate Plugin | Return to Plugin Installer

7. Enter your Marketo API credentials in the plugin settings page



**Setup Marketo**

You can get these settings from your Marketo Instance. Visit **Admin > Integration** on your Marketo Instance.

**Munchkin Account ID** — 123-ABC-456

*Copy **Munchkin Account ID** from the **Munchkin** tab.*

For the next two settings, you need to create a new custom service. Please follow the tutorial Here

**Client ID** — 851aa3af-8aa9-4025-97bf-2bc3a5fbdea1

*Copy **Client ID** from **Service Detail***

**Client Secret** — 7819e426f8e811e4a3221697f925ec7b

*Copy **Client Secret** from **Service Detail***

Munchkin JS

**Tracking Code Type** — Simple

*Choose the type of tracking code you want to include.*

Save Settings    Test Connection    Sync Fields

8. Click "Sync Fields"

## Setup Marketo

101 fields synced successfully.

You can get these settings from your Marketo Instance. Visit **Admin > Integration** on your Marketo Instance.

**Munchkin Account ID**

123-ABC-456

*Copy Munchkin Account ID from the Munchkin tab.*

For the next two settings, you need to create a new custom service. Please follow the tutorial Here

**Client ID**

851aa3af-8aa9-4025-97bf-2bc3a5fbdea1

*Copy Client ID from Service Detail*

**Client Secret**

7819e426f8e811e4a3221697f925ec7b

*Copy Client Secret from Service Detail*

Munchkin JS

**Tracking Code Type**

Simple

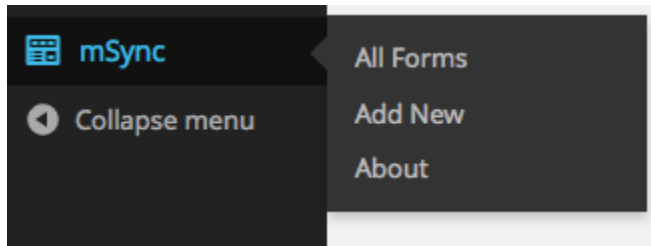*Choose the type of tracking code you want to include.*

Save Settings | Test Connection | Sync Fields

## Adding a New Form + Properties

1. In the left hand navigation bar, go to MSync and click on "Add New"



2. This will bring you to the form builder. Many of the fields are straight forward:
   a. *Form Name*: The name of your form
   b. *Canvas:* Where you'll build the form
   c. *Form Properties:* Choose labels of button/form description
3. Drag and drop and fill items that you want to build a form with
4. Select follow up action to be taken after form submission:
   a. None
   b. URL
   c. Post
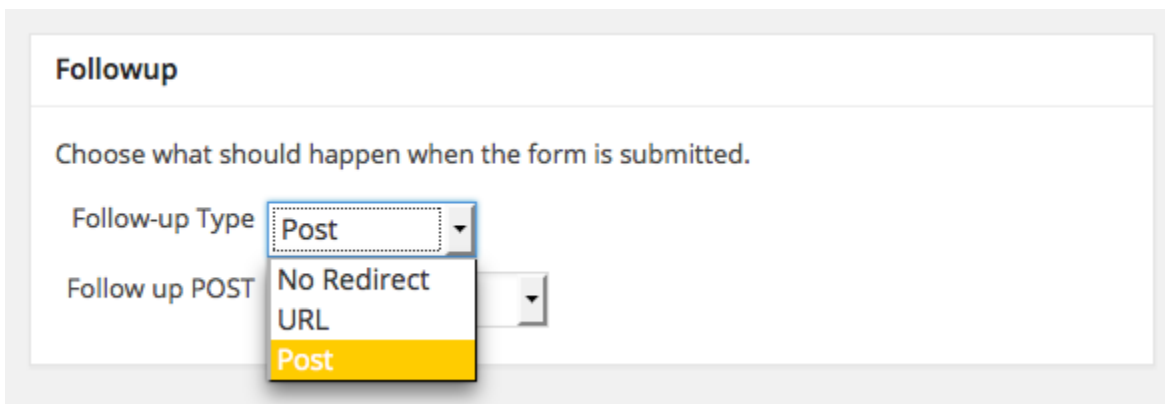


5. Save the form

## Adding a Form to a Single Page

1. Open new or existing post
2. Click on "Add Marketo Form" button in the editor
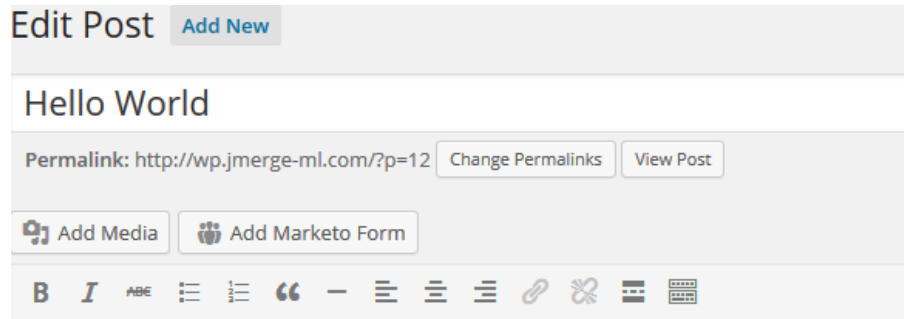


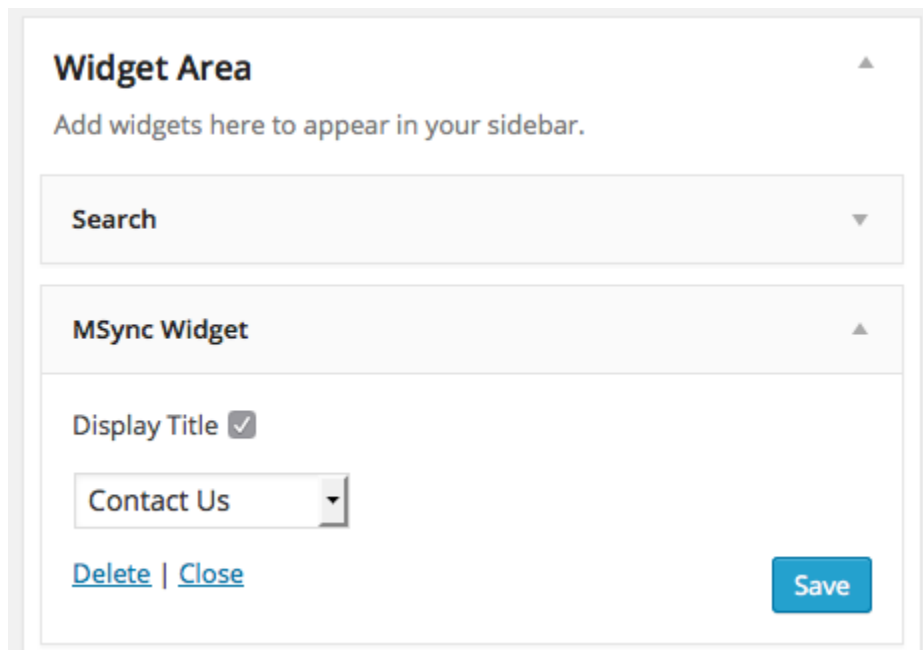3. Select the appropriate form you wish to add

## Adding a form to All Pages

1. Go to Appearances, then click on Widgets
2. Click on MSync Widget
3. Select Widget Area
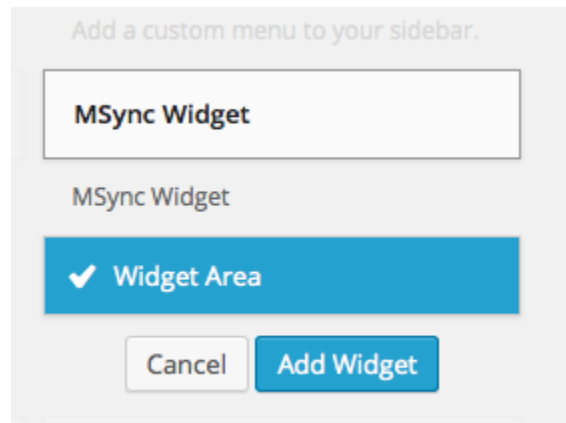


4. Drag and drop to appropriate position on the right hand side, then select where you would like the form to appear

## About WordPress

WordPress is the most popular content management system around. It's completely open source and has been utilized for almost every website imaginable, from personal blogging sites all the way to Fortune 500 companies. It's the largest self-hosted blogging tool in the world.

## About Marketo

Marketo is the industry leader in digital marketing automation software and solutions. It's utilized by over 50,000 Marketers that all come together in a vibrant community to share ideas, expertise and best practices. Marketo features include marketing automation, consumer engagement marketing, real time personalization, email marketing, inbound marketing, loyalty marketing, lead generation, event marketing and more. It is the industry standard for these processes.

## About Magic Logix

Magic Logix is a Dallas, Texas based integrated marketing agency that provides a full spectrum of customized digital solutions for clients in all industries, worldwide. Magic Logix relies on agile development that allows us to adapt for new technology and priorities throughout your project. Magic Logix creates and develops cross-functional solutions that are most logical for each client's unique environment, giving them a customer base that expands right before their very eyes.

## Website and Contact Information

- WordPress Plugin Website: https://wordpress.org/plugins/msync/
- Magic Logix Website: http://www.MagicLogix.com
- Email inquiries: sales@magiclogix.com
- Support email: support@magiclogix.com
- Contact phone: (214) 694 - 2162