



SaleCycle & Marketo Integration

# Introduction

The purpose of this document is to provide detail to SaleCycle clients on how to setup the integration between SaleCycle and Marketo, in the Marketo interface, and to provide detail on how the integration works.

*What is the purpose of this integration?*

This integration has been established to allow SaleCycle clients to send Email Remarketing messages via their Marketo account and give them further control of the email messages sent to their leads/recipients.

SaleCycle collects the data relating to its clients' website visitors, specifically those visitors who abandon a shopping cart or booking process.

As well as collecting this data, SaleCycle builds an HTML email designed and controlled via its own interface. The HTML contains content relating to the specific recipient (e.g. name, salutation) and their previous site visit (basket or booking contents).

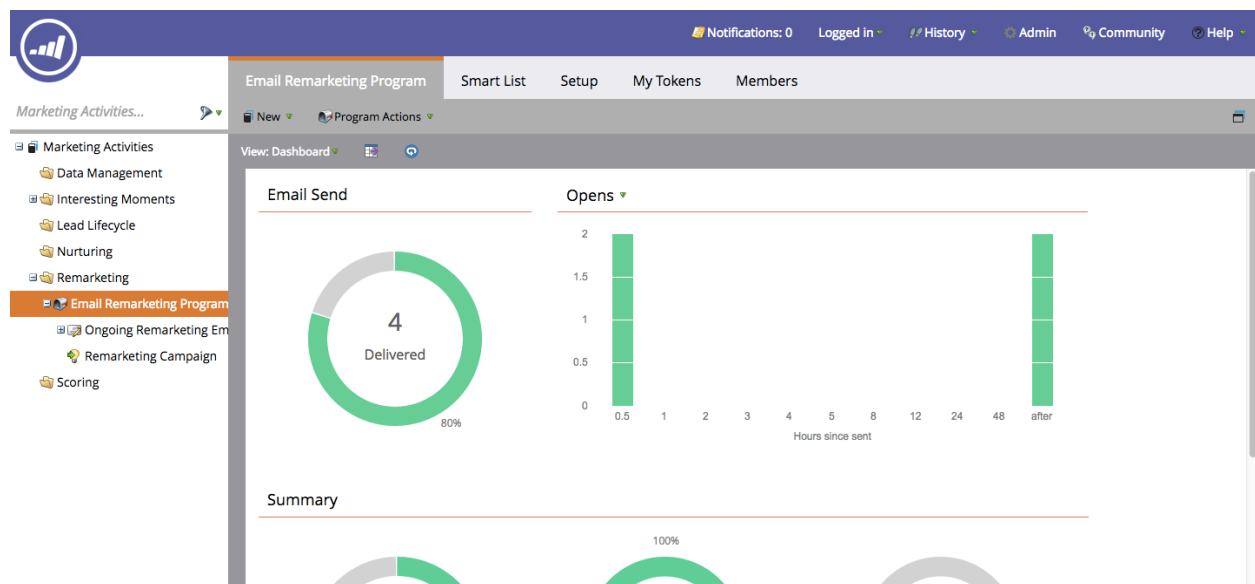
SaleCycle sends this HTML content in a prebuilt format as well as the recipients email address to the Marketo platform for the email to be dispatched/delivered.

# Setting up a SaleCycle campaign in Marketo

## Step 1 – Create an Email Program in Marketo

<https://docs.marketo.com/display/public/DOCS/Create+an+Email+Program>

1. Select Marketing Activities from the Marketo Menu.
2. Create a new Campaign Folder and call it "Remarketing".
3. Create a new Program in the Remarketing folder.
4. In the "New Program" window, enter "Email Remarketing Program" as Name.
5. Change Program Type to "Email".
6. Click on Create



## Step 2 – Define an Audience with a Smart List

<https://docs.marketo.com/display/public/DOCS/Define+an+Audience+with+a+Smart+List>

7. Go to the Marketing Activities area.
8. Select the “Email Remarketing Program” created before, and click Edit Smart List under the Audience tile.
9. No filters are required by SaleCycle, although they can be defined according to the needs of the campaign.

## Step 3 – Create Tokens

<http://docs.marketo.com/display/public/DOCS/Managing+My+Tokens#ManagingMyTokens-CreateaMyToken>

10. Go to the Marketing Activities area.
11. Select the “Email Remarketing Program” program and click on My Tokens.
12. Drag and Drop a Rich Text token to the left pane.
13. Name this token Body, and add a default (any) value.
14. Click on Save.
15. Create Text tokens for FromEmail, FromName, ReplyTo and Subject, repeating steps 3 to 5 above.

As a suggestion, default values can be as shown in the screenshot below. The can be any value, as they will get individually replaced by SaleCycle on every email sent through the campaign.

The screenshot displays the Marketo user interface for configuring tokens. The top navigation bar includes 'Notifications: 0', 'Logged In', 'History', 'Admin', 'Community', and 'Help'. The main header shows 'Email Remarketing Program', 'Smart List', 'Setup', 'My Tokens', and 'Members'. Below the header, there are options for 'New', 'Program Actions', 'Edit Token', and 'Delete Token'. A message states: 'These tokens can be referenced using this naming convention: {{my.My Token}}'. A table lists the configured tokens:

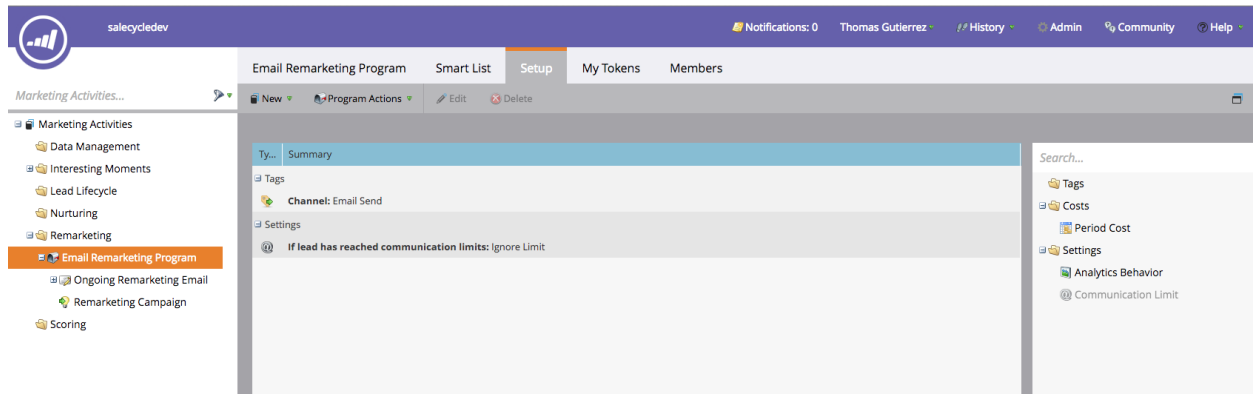
Token Name	Value	Updated
Local (5 Tokens)		
{{my.Body}}	Double-Click for Details	18 Dec 2015 13:48
{{my.FromEmail}}	info@salecycle.com	18 Dec 2015 13:49
{{my.FromName}}	Test	18 Dec 2015 13:49
{{my.ReplyTo}}	info@salecycle.com	18 Dec 2015 13:49
{{my.Subject}}	Test	18 Dec 2015 13:48

On the right side, a search bar is present above a list of token types: Calendar File, Date, Email Script, Number, Rich Text, Score, SFDC Campaign, and Text. The bottom right corner of the table area indicates '5 items'.

## Step 4 – Override Communication Limit (Optional)

<http://docs.marketo.com/display/public/DOCS/Enable+Communication+Limits>

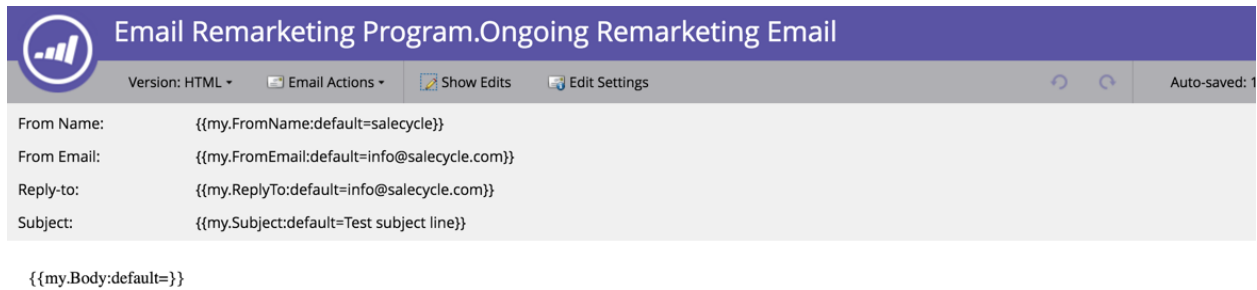
1. Under Admin, click on Communication Limits.
2. Click on Edit.
3. Pick the “Per Day” limit.
4. Select “Unlimited” in the Per Day and Per 7 Days drop down boxes.
5. Click “Save”.



## Step 5 – Create a new Email

<http://docs.marketo.com/display/public/DOCS/Create+an+Email+for+an+Email+Program>

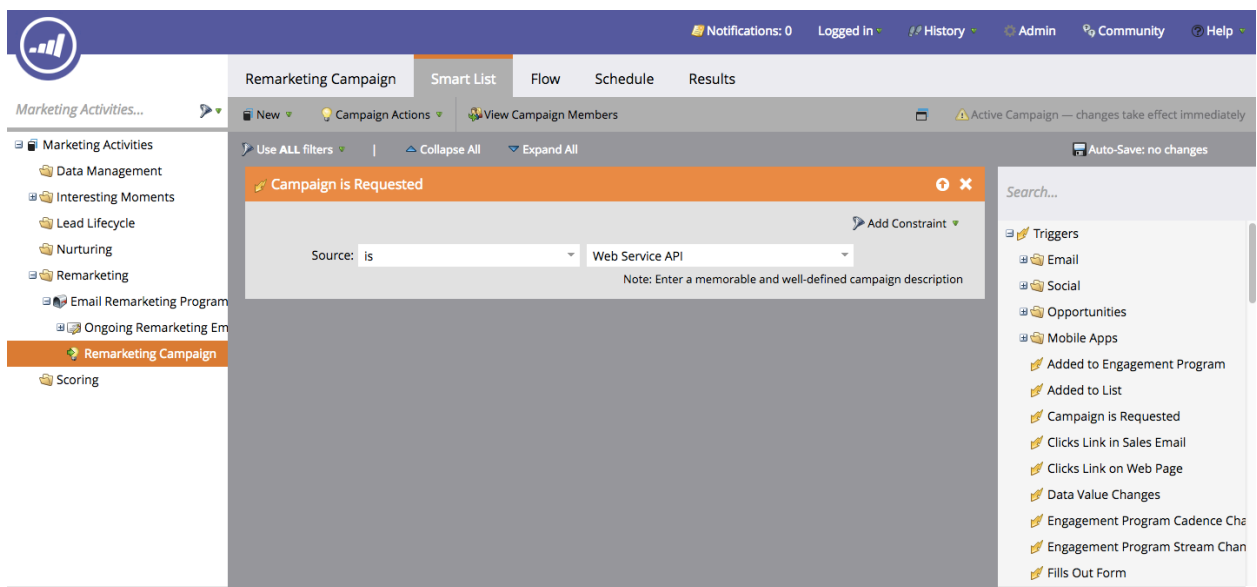
1. Under the Email tile, click New Email.
2. Give the email a name like "Ongoing Remarketing Email",
3. Select "Blank" as template.
4. Click on Create.
5. Select Operational.
6. Configure From, From Address, Reply-to and Subject from the tokens created in step 3 above.
7. Approve email.



## Step 6 – Create a new Smart Campaign

<http://docs.marketo.com/display/public/DOCS/Create+a+New+Smart+Campaign>

8. On Marketing Activities / Remarketing Folder / Email Remarketing Program right click on New Local Asset.
9. Select Smart Campaign.
10. Enter "Remarketing Campaign" in Name.
11. Click on Create.
12. Select Smart List Tab and drag and drop "Campaign is Requested".
13. Enter Web Service API in Source is field.
14. Go to Flow Tab.
15. Drag and Drop "Send Email" from Marketing.
16. Select "Email Remarketing Program.Ongoing Remarketing Email" in Email field.
17. Select Triggered Campaign Schedule and click on "Activate".



# What SaleCycle requires for the integration

To integrate fully, SaleCycle requires the Marketo client's authentication token details, to create a token a detailed explanation is provided here:

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

From that token, SaleCycle require the following information:

- Endpoint (Url)
- Client Key
- Client Secret

Other than the token information, SaleCycle will need:

- Your Campaign Id
- Whether SaleCycle is to create a new lead if the lead does not exist (true/false)
- The value of the From Name that will appear in all email notifications (i.e. "Company Name")
- The value of the From Email email property (i.e. "marketing@companyname.com")
- The value of the Reply To email property (i.e. "replies@companyname.com")

## How SaleCycle uses your Marketo campaign

SaleCycle connects to your specific Marketo campaign through Marketo's REST APIs. The SaleCycle connector follows these steps to dispatch one-to-one emails to website visitors:

1. Checks, by email address, if the website visitor already exists.
2. If the website visitor does not exist, creates a new lead.
3. Adds the new lead to the configured Smart List.
4. Triggers the email with custom tokens for the email content, email address, subject line, from name, from address and reply to address.