

Conversica Marketo Setup Guide

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 Customer Success Manager

B. Enable the REST API in Marketo

Follow the steps in <http://developers.marketo.com/blog/quick-start-guide-for-marketo-rest-api/> and then provide your Conversica Customer Success Manager with the following information:

- 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)

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 Lead Status	Text	conversicaLeadStatus
Conversica Lead Status Date	Datetime	conversicaLeadStatusDate
Conversica Conversation Stage	Text	conversicaConversationStage
Conversica Conversation Stage Date	Datetime	conversicaConversationStageDate
Conversica Conversation Status	Text	conversicaConversationStatus
Conversica Conversation Status Date	Datetime	conversicaConversationStatusDate
Conversica Stop	Boolean	conversicaStop
Conversica Skip To Follow Up	Boolean	conversicaSkipToFollowUp
Conversica Lead Profile	Text	conversicaLeadProfile

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 and SOAP API. Please contact your Technical Account Manager to complete this step.

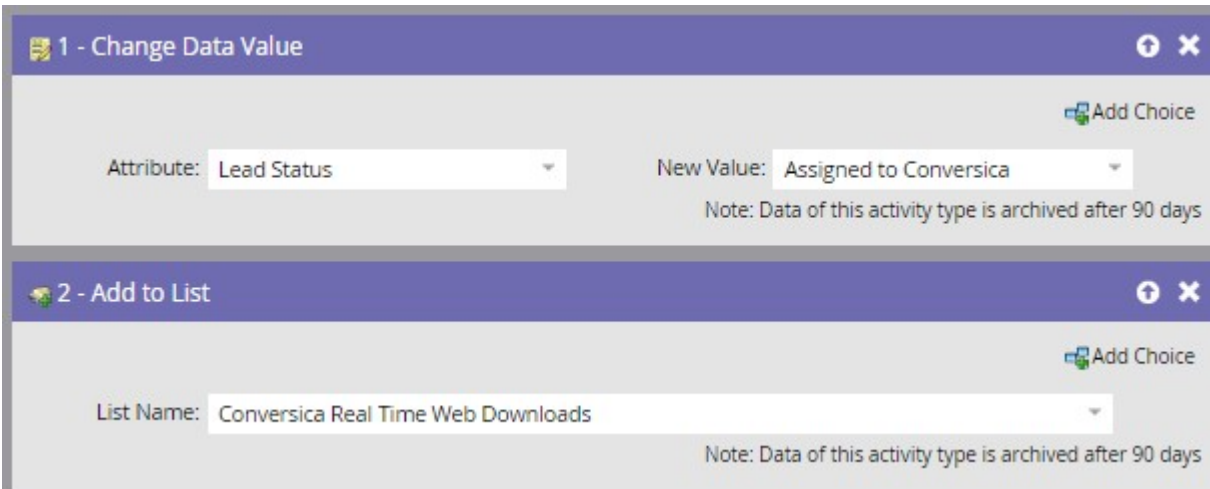
E. Create Static Lists

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 conversation.

In the Marketo Lead Database tab, select New and then choose New List. Create a static lead list for each of your Conversica conversations. Provide the URLs of your lists to your Technical Account Manager so they can be connected to the correct conversations 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:

Data Value Changes ⓘ ✕

➤ Add Constraint ▾

Attribute:

New Value:

1 - Member of Program ⓘ ✕

➤ Add Constraint ▾

Member of Program:

Program: + ▾

Flow:

1 - Send Alert ⓘ ✕

➤ Add Choice

Email: 📧

Send To:

To Other Emails:

2 - Change Data Value ⓘ ✕

➤ Add Choice

Attribute:

New Value:

H. Contact Conversica for Support

Should you have any questions or issues, please don't hesitate to connect with your Customer Success Manager (CSM), 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