



Conversica Marketo Setup Guide

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1. Before Installation

Before beginning your Conversica installation, please ensure the following:

- You have sufficient administrative permissions for your Marketo system
- Your Conversica account is provisioned and ready for use
- You have established contact with your Conversica Technical Account Manager

2. Enable the REST API in Marketo

Follow the steps outlined in the Marketo REST API Quick Start Guide (Accessed here:

<http://developers.marketo.com/blog/quick-start-guide-for-marketo-rest-api/>) and then provide your Conversica Technical Account Manager with the following information:

- Client Id
- Client Secret
- REST API Endpoint URL (as shown in step 8)
- Identity URL (as shown in step 8)

Note: When creating the new Role for the API-Only User (as shown in step 3), select only the following Permission:

- Read-Write Lead

3. Create Custom Fields in Marketo

You will create these custom fields in **Admin > Field Management**. To create the fields, click **“New Custom Field,”** enter the details as listed below, and then click **“Create”** for each.

(Note: Please refer to Appendix A for custom fields synced between Marketo and Salesforce.)

Required Fields

Name	Type	API Name
Conversica Conversation	String	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	String	conversicaMostRecentResponse
Conversica Lead Status	String	conversicaLeadStatus
Conversica Lead Status Date	Datetime	conversicaLeadStatusDate
Conversica Conversation Stage	String	conversicaConversationStage
Conversica Conversation Stage Date	Datetime	conversicaConversationStageDate
Conversica Conversation Status	String	conversicaConversationStatus
Conversica Conversation Status Date	Datetime	conversicaConversationStatusDate
Conversica Stop	Boolean	conversicaStop
Conversica Skip To Follow Up	Boolean	conversicaSkipToFollowUp
Conversica Lead Profile	String	conversicaLeadProfile
Conversica Further Action	Boolean	conversicaFurtherAction
Conversica Further Action Date	Datetime	conversicaFurtherActionDate
Conversica Last Response Date	Datetime	conversicaLastResponseDate
Conversica Discovered Email 1	String	conversicaDiscoveredEmail1
Conversica Discovered Email 2	String	conversicaDiscoveredEmail2
Conversica Discovered Name	String	conversicaDiscoveredName
Conversica SMS Opt Out	Boolean	conversicaSMSOptOut
Conversica First Message Date	Datetime	conversicaFirstMessageDate
Conversica Last Message Date	Datetime	conversicaLastMessageDate
Conversica Date Added	Datetime	conversicaDateAdded

Required Lead Owner Fields

The following fields should also be created. In order for Conversica 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.

Name	Type	API Name
Conversica Lead Owner Email	Email	conversicaLeadOwnerEmail
Conversica Lead Owner First Name	String	conversicaLeadOwnerFirstName
Conversica Lead Owner Last Name	String	conversicaLeadOwnerLastName

4. Connect Marketo to Conversica

At this step, you should notify Conversica that you are ready to connect the two systems. Please contact your Conversica Technical Account Manager to complete this step.

5. Create Static Lists

Leads are synced to Conversica Conversations via Marketo Static Lists. In the **Marketo Lead Database** tab, select **“New”** and then select **“New List.”** From here, you can create Static Lists for each of your Conversica Conversations. Provide the names and URLs of your Lists to your Conversica Technical Account Manager so they can be connected to the correct Conversica Conversations.

6. Configure Smart Campaigns to Add Leads to Static Lists

In your desired Smart Campaign, simply add a flow step of **“Add to List”** and select the Static List you already created for use with a Conversica Conversation. In this example, we set the lead status value to **“Assigned to Conversica”** and then to add the lead to the List:

The screenshot displays two configuration steps for a Smart Campaign:

- Step 1: Change Data Value**
 - Attribute:
 - New Value:
 - Note: Data of this activity type is archived after 90 days
- Step 2: Add to List**
 - List Name:
 - Note: Data of this activity type is archived after 90 days

7. Configure Smart Campaigns to Listen for Status Updates

Use a “**Delta Value Changes**” trigger to listen for the **Conversica Hot Lead** field value to become “true.” Then, take an appropriate action, such as sending an alert and updating the lead status value.

In this example, we look for the **Conversica Hot Lead** status value to become “true” for members of a specific Program in Marketo, and then we send an alert to the “**Lead Owner**” and change the status value to “**Conversica Hot Lead**.”

Smart List

The screenshot shows the configuration for a Smart List with two filters. The first filter, titled "Data Value Changes", has the attribute "Conversica Hot Lead" and the new value "true". The second filter, titled "1 - Member of Program", has the member of program "true" and the program "is 2015 Marketo Summit Whitepaper".

Filter Title	Attribute	New Value
Data Value Changes	Conversica Hot Lead	true
1 - Member of Program	Member of Program	true
	Program	is 2015 Marketo Summit Whitepaper

Flow

The screenshot shows the configuration for a flow with two actions. The first action, titled "1 - Send Alert", sends an email to "Lead Owner" with the subject "2015 Marketo Summit Whit...". The second action, titled "2 - Change Data Value", changes the "Lead Status" attribute to "Conversica Hot Lead".

Action Title	Attribute	New Value	Send To	To Other Emails
1 - Send Alert			Lead Owner	Enter email...
	Email			
2 - Change Data Value	Lead Status	Conversica Hot Lead		

7. Contact Conversica for Support

Should you have any questions or issues, please don't hesitate to connect with your Conversica Customer Success Manager (CSM) or Technical Account Manager (TAM). Or, you can email us at 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 to Salesforce.

The following custom fields must be created in Salesforce with the correct API name and synced to Marketo. These field names must use the same naming scheme as stated in the table below.

Required Fields

Name	Type	API Name
Conversica Conversation	String	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	String	conversicaMostRecentResponse__c
Conversica Lead Status	String	conversicaStatus__c
Conversica Lead Status Date	Datetime	conversicaLeadStatusDate__c
Conversica Stop	Boolean	conversicaStop__c
Conversica Conversation Stage	String	conversicaConversationStage__c
Conversica Conversation Stage Date	Datetime	conversicaConversationStageDate__c
Conversica Conversation Status	String	conversicaConversationStatus__c
Conversica Conversation Status Date	Datetime	conversicaConversationStatusDate__c

Conversica Skip To Follow Up	Boolean	conversicaSkipToFollowUp__c
Conversica Lead Profile	String	conversicaLeadProfile__c
Conversica Further Action	Boolean	conversicaFurtherAction__c
Conversica Further Action Date	Datetime	conversicaFurtherActionDate__c
Conversica Last Response Date	Datetime	conversicaLastResponseDate__c
Conversica Discovered Email 1	String	conversicaDiscoveredEmail1__c
Conversica Discovered Email 2	String	conversicaDiscoveredEmail2__c
Conversica Discovered Name	String	conversicaDiscoveredName__c
Conversica SMS Opt Out	Boolean	conversicaSmsOptout__c
Conversica First Message Date	Datetime	conversicaFirstMessageDate__c
Conversica Last Message Date	Datetime	conversicaLastMessageDate__c
Conversica Date Added	Datetime	conversicaDateAdded__c

Required Lead Owner Fields

Name	Type	API Name
Conversica Lead Owner Email	Email	conversicaLeadOwnerEmail__c
Conversica Lead Owner First Name	String	conversicaLeadOwnerFirstName__c
Conversica Lead Owner Last Name	String	conversicaLeadOwnerLastName__c