

Allocadia Marketo Connector - Overview

CRM and marketing automation platforms capture great results metrics, however there is no link to your marketing spend. With Allocadia's Marketo connector you can link your marketing investments spend in Allocadia to your Marketo programs and metrics, giving you a full picture of your marketing ROI.

How does the Marketo Connector work?

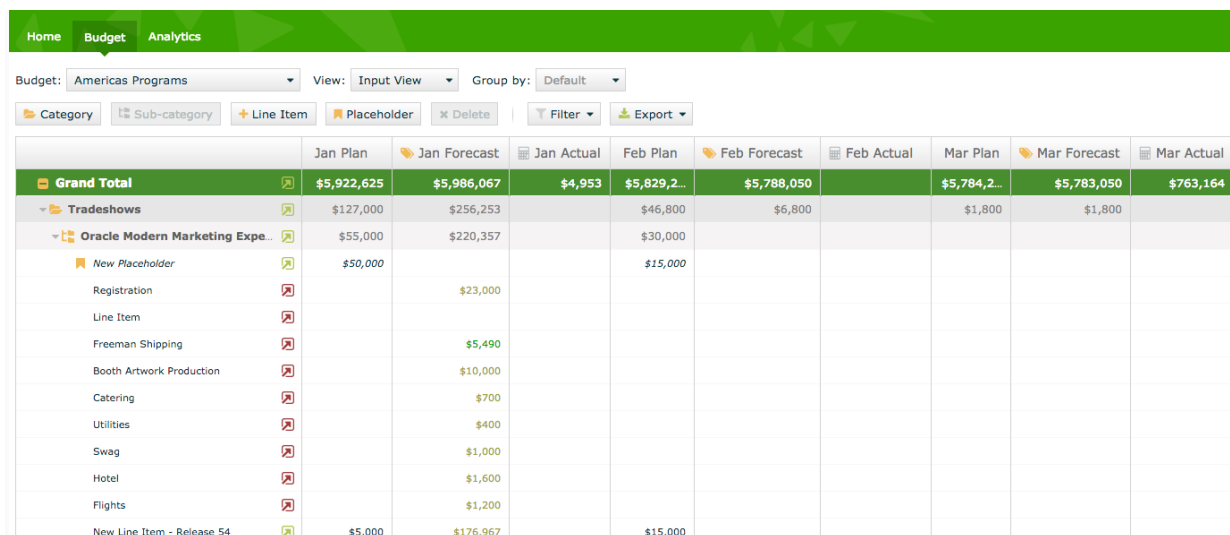
The Marketo Connector pulls Marketo Program names into Allocadia as a drop-down field on the details panel. Marketing End Users tag their spend to Marketo Programs. Using the Marketo Program tag on the details panel, Allocadia pushes investment data into Marketo as period cost.

Tag Spend to Marketo Programs:


Set-up the Marketo Connector in the Allocadia master settings area. Read the [Marketo Connector - Setup Instructions](#) support article for more information.

Once the Marketo Connector has been set-up, your Marketing team can begin tagging their marketing spend in Allocadia to Marketo programs.

- Open the budget that you would like to update with Marketo Programs.



	Jan Plan	Jan Forecast	Jan Actual	Feb Plan	Feb Forecast	Feb Actual	Mar Plan	Mar Forecast	Mar Actual
Grand Total	\$5,922,625	\$5,986,067	\$4,953	\$5,829,2...	\$5,788,050		\$5,784,2...	\$5,783,050	\$763,164
Tradeshows	\$127,000	\$256,253		\$46,800	\$6,800		\$1,800	\$1,800	
Oracle Modern Marketing Expe...	\$55,000	\$220,357		\$30,000					
<i>New Placeholder</i>	\$50,000			\$15,000					
Registration		\$23,000							
Line Item									
Freeman Shipping		\$5,490							
Booth Artwork Production		\$10,000							
Catering		\$700							
Utilities		\$400							
Swag		\$1,000							
Hotel		\$1,600							
Flights		\$1,200							
New Line Item - Release 54	\$5,000	\$176,967		\$15,000					

- Find the Line Item that you are going to tag to a Marketo Program. In this example we will use Travel under the Traction sub-category.
- Open the Details panel by clicking on the  icon.
- Click the Marketo Program drop-down menu and select a Marketo Program from the drop down list.

Expense Item: Website A x

DETAILS	ACTUALS	PO	AUDIT TRAIL
ROI Connectors			
Market Program	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #f0f0f0; padding: 2px;">--None--</div> <div style="background-color: #e0f0e0; padding: 2px;">--None--</div> <div style="padding: 2px;">Arabic هل هذا كسر؟</div> <div style="padding: 2px;">Bengali এই বিরতি আছে?</div> <div style="padding: 2px;">Chinese 这是否打破?</div> <div style="padding: 2px;">Default Program</div> <div style="padding: 2px;">Engagement Program 2</div> <div style="padding: 2px;">Event Program</div> <div style="padding: 2px;">French Est-ce que cette pause?</div> <div style="padding: 2px;">Hebrew האם זה לשבור?</div> <div style="padding: 2px;">Hindi इस लोड करता है?</div> <div style="padding: 2px;">Japanese Budget 私はテストの愛</div> <div style="padding: 2px;">Portuguese Será que isso quebrar?</div> <div style="padding: 2px;">Russian Budget Означает ли это сломать?</div> <div style="padding: 2px;">Spanish ¿Esto rompe?</div> <div style="padding: 2px;">南京明典教育科技有限公司</div> </div>		
Planning			
Multi-select List			
Account Code			
Calendar Type			
Vendor			
Product			
Objective			
Campaign			
Campaign Type			
Target Audience			
Region			
Start Date			
End Date	-		
Notes	-		

Note: Tagging (aka. Inputting) the Marketo Programs to the marketing spend can be done bottoms-up or top-down.

- Bottoms-up - Input is done at the line item level. We recommend using the bottoms-up input workflow when line items within a category or sub-category are related to multiple Marketo Programs.
- Top-down - Input is done at the category or sub-category level cascading down to the sub-categories and line items inside. Using the top-down input workflow is ideal when all items within the category or sub-category are associated with one Marketo Program.
- If a sub-category or line item has been tagged with a Marketo Program via the top-down input workflow, and the item is moved to another category or sub-category

that was tagged using the top-down input workflow, the Marketo Program input will be overwritten to match the new top-down input.

- If a sub-category or line item has been tagged with a Marketo Program via the top-down input workflow and the item is moved to a category or sub-category that was tagged using the bottoms-up input workflow the line item will retain its Marketo Program input.

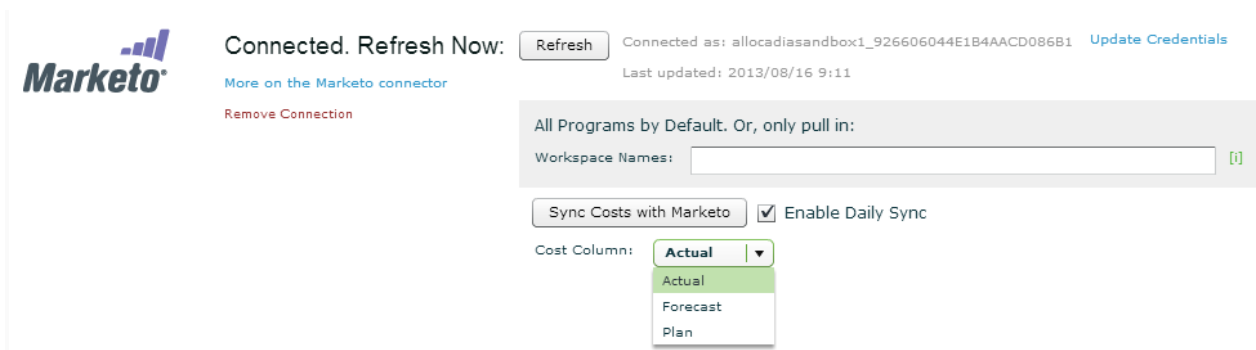
Note - Optimization of your Marketo Connector is dependent on complete and accurate input from your Marketing End Users.

View Period Spend / Costs in Marketo:

The Marketo Connector can be set-up to sync with Marketo on a daily basis (between 2 am and 3 am UTC), or can be synced manually at any time. If you make changes to your spend in Allocadia after 3 am UTC and want to see the changes in Marketo immediately, the connector will need to be synced manually. Please be aware that Marketo syncs with RCA once daily starting at 11 pm CST.

Manually Sync the Marketo Connector

- On the Home tab, click master settings in the Edit Settings column.
- The Settings area opens. Single click on the **Connectors** link to access the Connectors page.



Marketo **Connected. Refresh Now:** Refresh Connected as: allocadiasandbox1_926606044E1B4AACD086B1 Update Credentials
 More on the Marketo connector Last updated: 2013/08/16 9:11
 Remove Connection

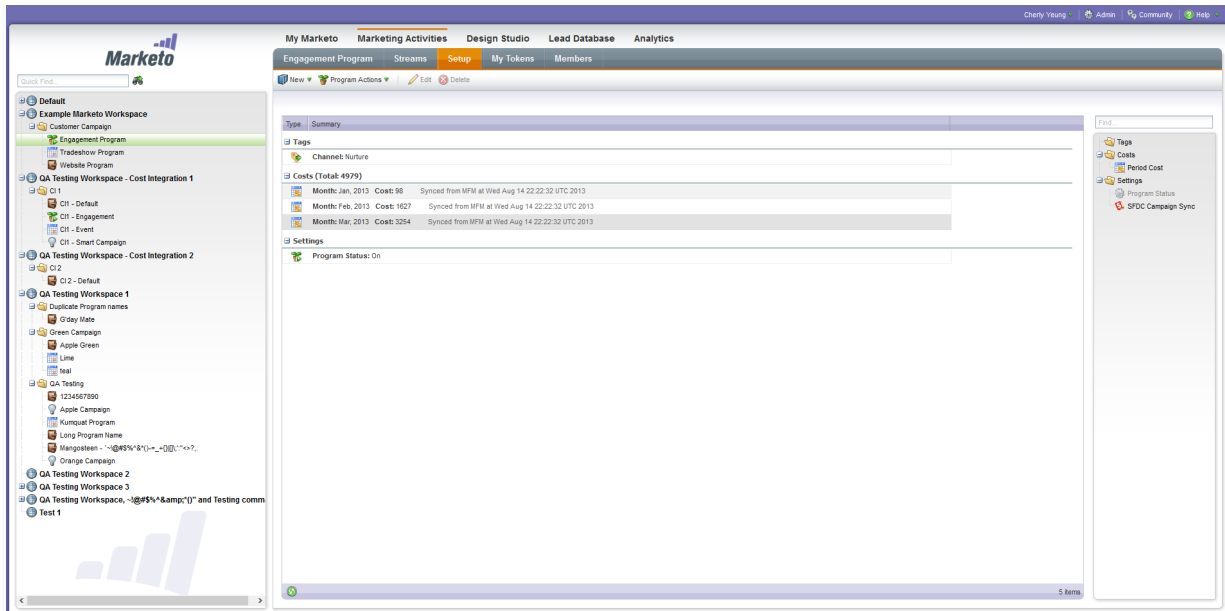
All Programs by Default. Or, only pull in:
 Workspace Names:

Sync Costs with Marketo Enable Daily Sync

Cost Column: **Actual** | ▼
 Actual
 Forecast
 Plan

- Click the Sync Costs with Marketo button. Please note that the Refresh button does not sync the connector.

View Period Spend / Costs in Market



- Period Costs in Marketo are monthly.
- Period Costs that are entered manually before or after the connector set-up will be over written during sync.
- Monthly spend in Allocadia that is tagged with a Marketo Program is aggregated to one monthly Period Cost. For example if the entire Tradeshow category is tagged to the Engagement Program, spend associated with the line items inside of Tradeshow will be aggregated monthly to one monthly Period Cost under Engagement Program.
- If using multi-currency in Allocadia, spend will be converted to the master currency before syncing with Marketo.
- Please be aware that Marketo's API does not acknowledge negative values or \$0 amounts reflecting \$1 values in place.