

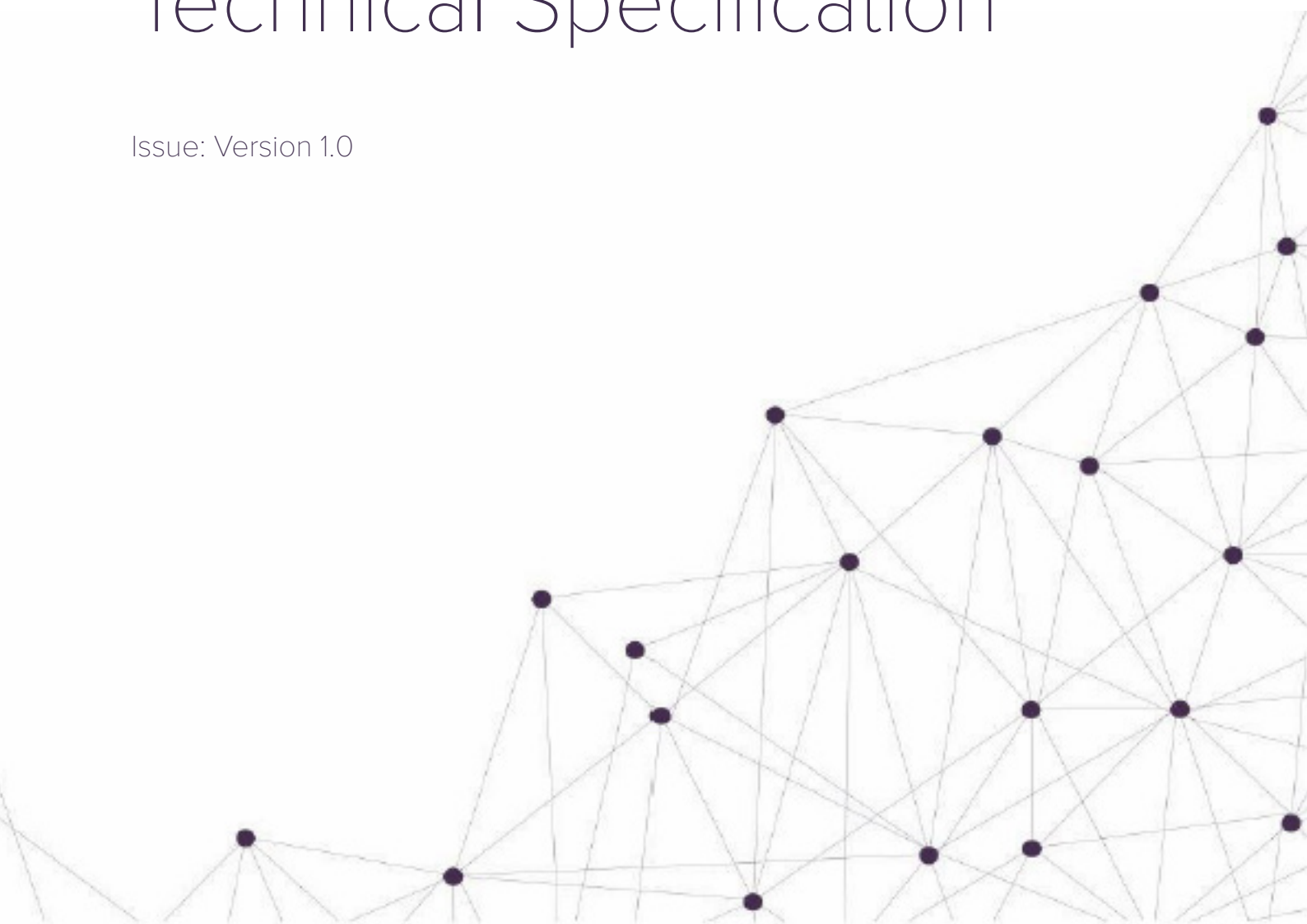


# Marketo- Engage SMS Integration Guide

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## Technical Specification

Issue: Version 1.0



## Scope



This document outlines the process of making a connection between Marketo and Engage Logic Builder for the purpose of sending and receiving SMS messages.

Engage will be assisting in the set up process to make this as easy as possible.

## What you will need:

1. An Engage SMS account. If you do not have an account please email our sales team [sales@engage-au.com](mailto:sales@engage-au.com)
2. Logic Builder API authentication details. These will be provided by your account manager during the set up process.
3. ( optional ) An SMS longcode for the receiving of incoming SMS messages from your leads / contacts. This can be arranged with your account manager.

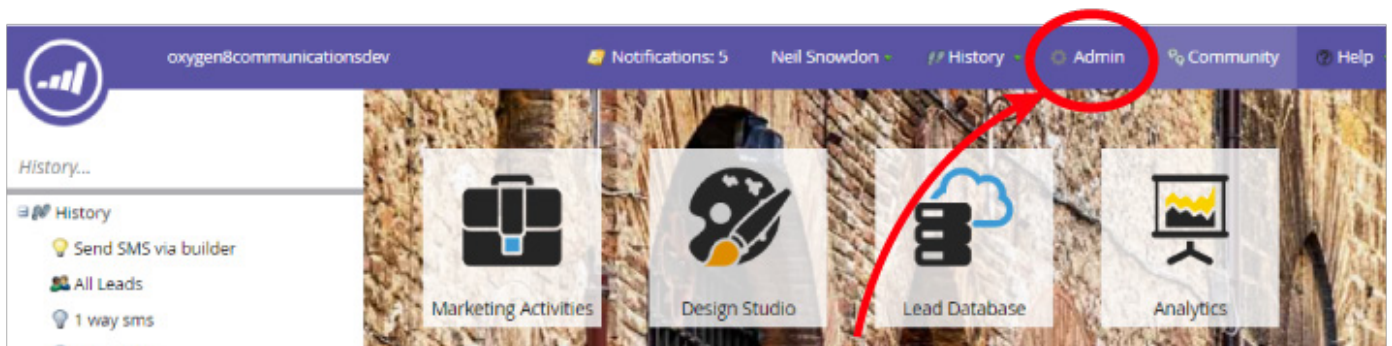
## Sending SMS Messages

Using the Marketo Webhooks, you can call external applications / campaigns.

Engage platforms can be triggered using this method. We do not dictate the naming convention of your Marketo tokens. The Engage platforms are flexible, therefore you decide how you want to present the information to us.

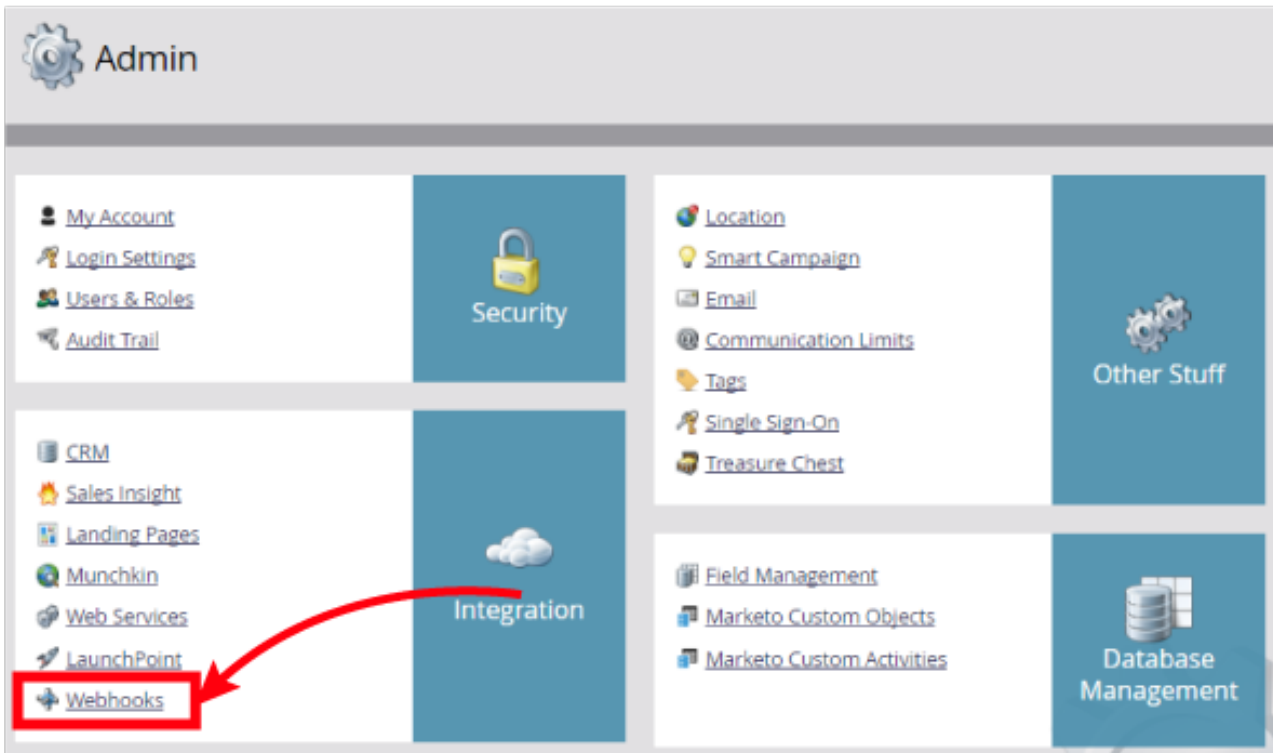
## Setting up a Webhook

In your Marketo instance, open up your Admin settings from the top right menu.



This will open the Admin Options.

You will need to click on the Integration option : Webhooks.



From the next screen, click the 'New Webhook' menu option. This will open up a New Webhook Input form window.

### New Webhook

Webhook Name: \*

Description:

URL: \*

Request Type: \*

Template:

Request Token Encoding:

Response type:

**Webhook Name:** Give your webhook a campaign specific name.

**Description:** Add something meaningful that describes what the webhook will do eg, 'Send SMS Webhook'

**URL:** Depending on the campaign and its complexity we have several URLs that can be called. It also depends on which platform API you want use. This information will be supplied by your account manager during the set up process.

**Request Type:** POST

**Template:** The template is to contain all of the necessary information to trigger the correct campaign and deliver the required information to construct the SMS



message and/or contain information pertaining to the marketo lead to make the content dynamic, or even details on which Marketo Lead to update if using 2 Way SMS when writing back into Marketo. This could be send message status, a delivery receipt or the incoming message.

An example would be:

```
username=yourusername&password=yourpassword&builderid=12345&msisdn={{yourMarketoToken}}&content=The message you want to send. This can contain Marketo Token values.&mask={{ yourMarketoToken }}&leadid={{LeadID}}
```

`username` / `password` / `builderid` will identify which account on the Engage Platform id being triggered. The required fields are;

`msisdn` ( mobile number ) / `content` ( the message to send ) are also required fields but you can name them as you like, We will match them in our platform.

`mask` { the originator of the message as it appears on the handset ) / `leadid` ( marketo LeadID ) are optional.

You can add any number of additional parameters / values to the request. Just let your account manger know what they are and how we need to interpret them and they can be built into the campaign logic.

**Requesting Token:** Form/Url

**Response type:** JSON

All you need to do now is hit the 'SAVE' button and your Webhook is ready to be used in your Marketo Campaigns.

## Information posting back into Marketo

Engage Logic Builder has the ability to capture every stage of the SMS message journey and report those details back into Marketo. You may want to know that the mobile number is in the correct format, or that the carrier has failed to deliver to this handset. It may be that you want 2 way SMS so you'll need the incoming messages delivered into a custom field. It might even be that you dont have the lead and you are using an inbound SMS campaign to create new leads.

To do this we take advantage of the many Marketo REST API Suite.

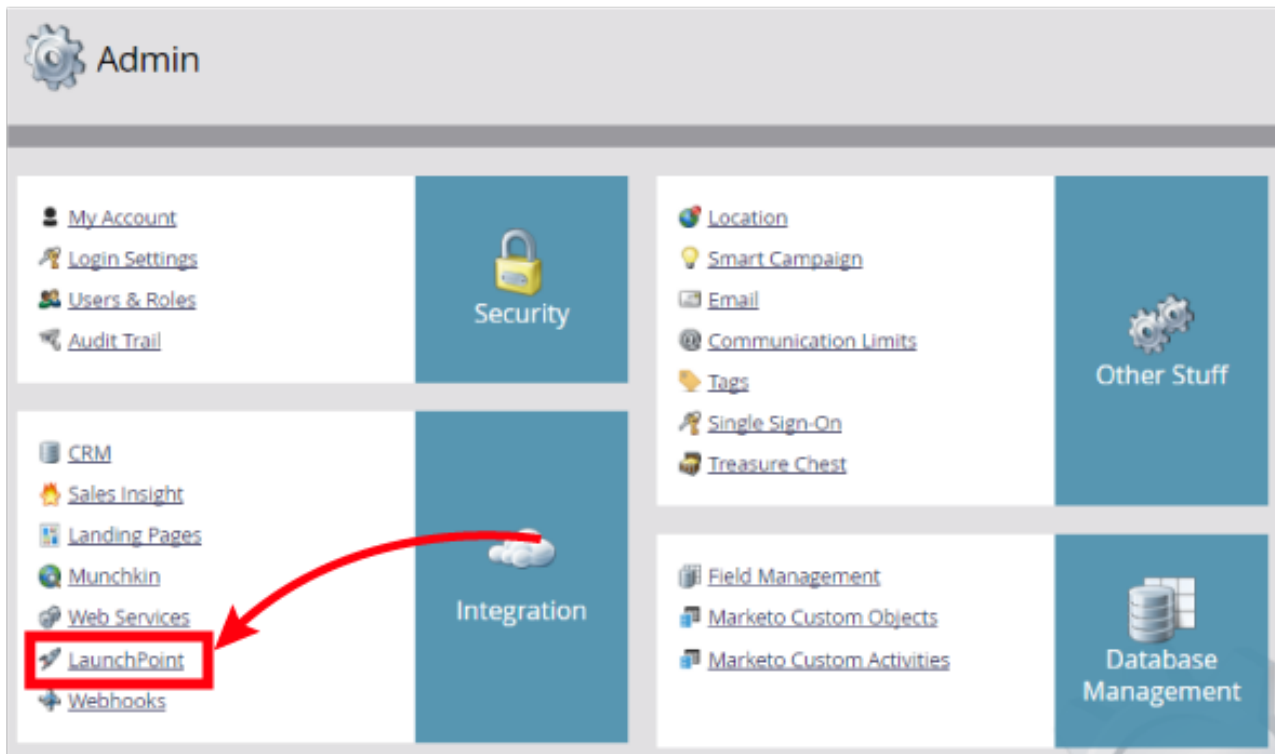
You will therefore need to set up a new Marketo Service.

## New Service



Setting up a new service will create a unique route into Marketo and provide a Client ID and a Client Secret. We use these details when making API requests back into Marketo.

To do this, access the 'Admin' section, but this time select 'Launchpoint'



When Marketo loads the new screen select 'New Service' from the 'New' menu item.

Simply give the new service a name and select 'Custom' from the Service: drop down field.

Two new fields will open up. A description and another dropdown to select the user account to use the API. You may need to create an API User if you havent already done so. This is described later in this document.



Click 'SAVE'

You will now see the new service listing on the page. If you click on the link 'View Details' it will display the Client ID and the Client Secret that you have just created.

The screenshot shows the 'Installed Services' interface. At the top, there are tabs for 'New', 'Service Actions', and 'Edit Service'. Below is a table with the following data:

Name	Type	Used by	Status	Details
Neil REST api service	Custom	0	Active	<a href="#">View Details</a>

A 'Details' modal window is open, displaying the following information:

- Client Id: `nd00Pv08-9-07-001201-0a0f0c7b930-4`
- Client Secret: `Wp07h-Ry000u0u0f0R-0702000-000-000`
- Authorized User: `00000000000000000000000000000000`

Below the details is a 'GET TOKEN' button and a large white text area. A 'CLOSE' button is located at the bottom right of the modal.

You will need to supply these credentials along with the REST API endpoint.

This can be found in the Admin Settings.

Click on 'Web Services' from the Integration menu.

The screenshot shows the 'Admin' settings page. The 'Integration' menu is visible, and 'Web Services' is highlighted with a red box and a red arrow pointing to it. The 'Integration' menu includes the following items:

- CRM
- Sales Insight
- Landing Pages
- Munchkin
- Web Services**
- LaunchPoint
- Webhooks

Other visible settings categories include 'Security', 'Other Stuff', and 'Database Management'.



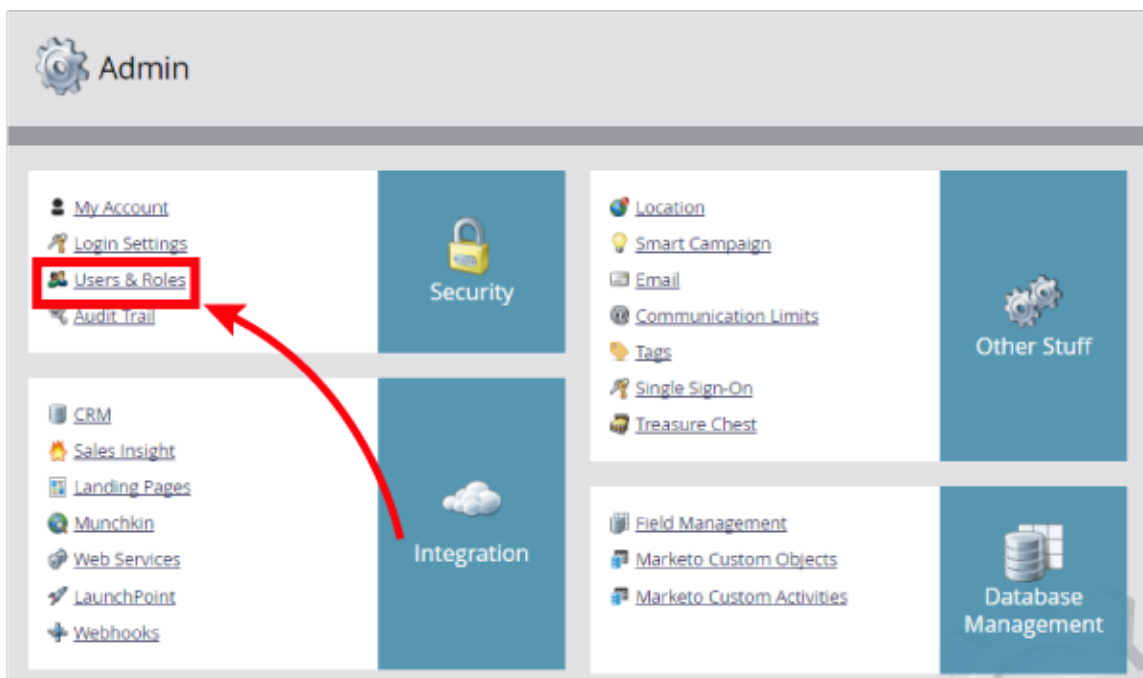
REST API	
Endpoint:	<a href="https://mktorest.com/rest">https://mktorest.com/rest</a>
Identity:	<a href="https://mktorest.com/identity">https://mktorest.com/identity</a>
REST API documentation:	<a href="http://developers.marketo.com/documentation/rest">http://developers.marketo.com/documentation/rest</a>

## New User

To open up Marketo's API suite you may also need to create a new User with the API role.

This will appear in the drop down list when creating the New Service.

To add a new user, within Admin Settings Click 'Users & Roles' from the Security section.



Add a First Name, Last Name and Email Address for the new user role. Then tick the checkbox API Role from the Roles section.

Click save.

This creates the new role to select when creating the New Service.

**Edit User**

First Name: \*

Last Name: \*

Email Address: \*

Roles:

- Admin
- Analytics User
- API Role
- Marketing User
- Standard User
- Web Designer

Mobile Phone:

API Only:

Access Expires: Never

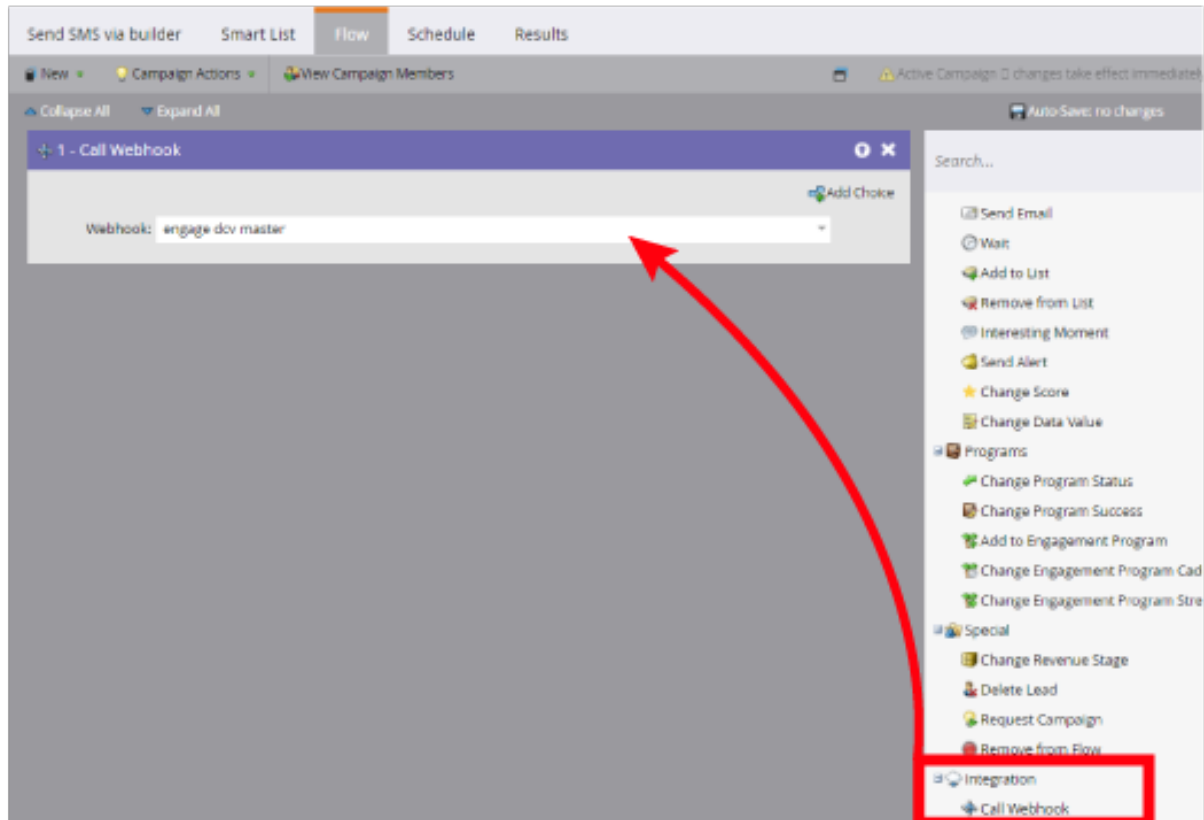
CANCEL SAVE



## Using a Webhook

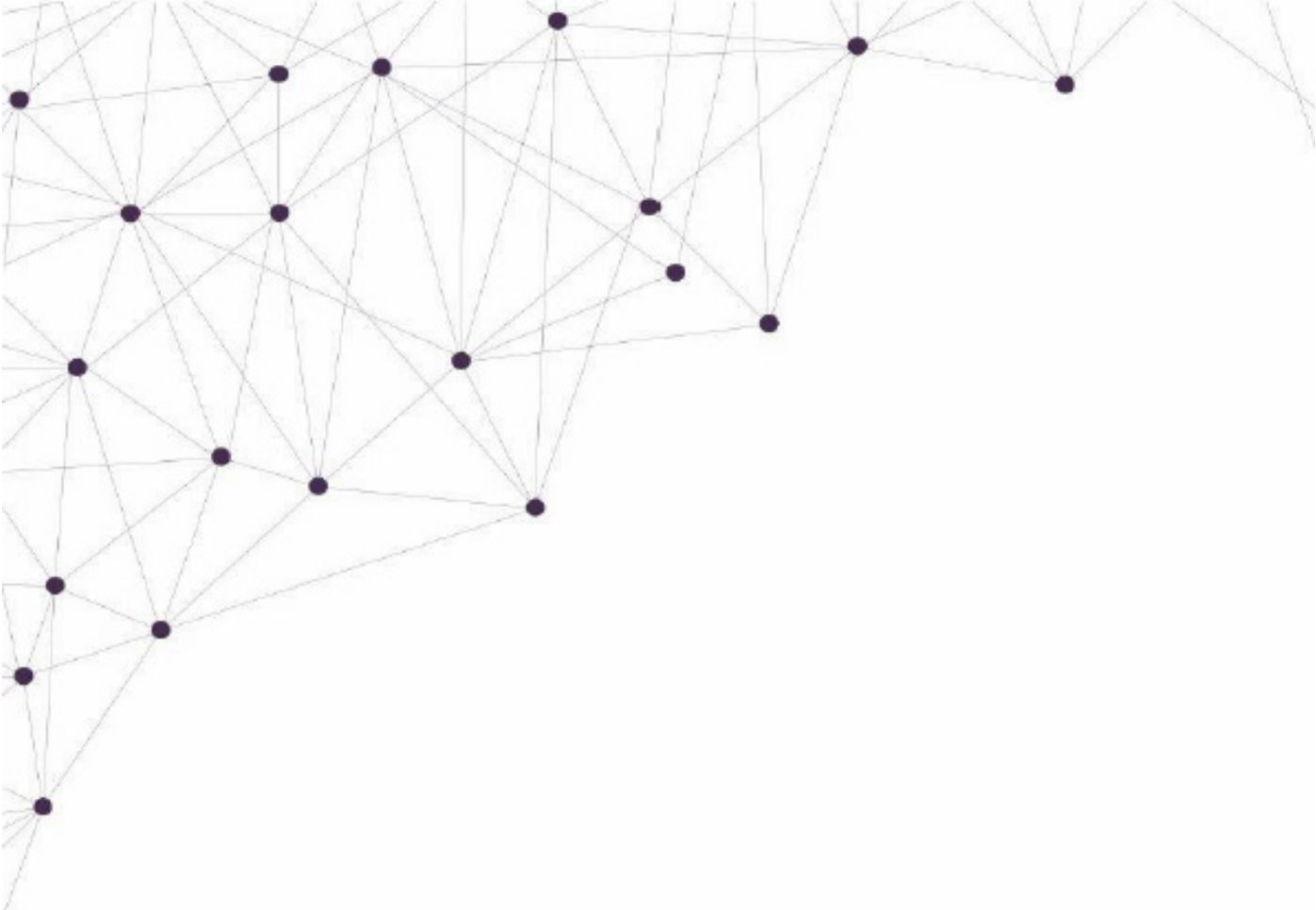
You can now select our new Webhook in your Marketing Campaign and send SMS straight from Marketo.

The Webhook can be added in the 'Flow' from the Integrations items from the right hand options. Simply drag it into your campaign flow and select it from the drop down.



Engage has the most flexible API for SMS integration. Just let us know what you want to do and we will make it happen.





**engage**  
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