



ZenDirect™

Marketo Integration Tutorial

Automated Print Marketing.



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Part 1: Marketo Webhooks Integration

Part 2: Marketo Alert E-mail Integration



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Step 1: Create Free ZenDirect Account



First name

Last name

Your email address

Type a password

Do you have an affiliate code?

Create my Account



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Step 2: Configure ZenDirect Account

For best results, we recommend you add a default return address, add a valid credit card and enable auto-replenishment one-time in ZenDirect

1) Add a return address
(My Account / My Profile tab)

NEW RETURN ADDRESS

Company (Optional)

First Name Last Name


Street Street 2

City State Postal Code

Country
United States

2) Add a valid credit card
& Enable auto-replenishment
My Account / Billing Info tab

ADD A NEW CARD



Credit Card Number

Expiration Date Security Code

Billing first name Billing last name

Street address

City State Postal Code

United States

Save this card as my default payment

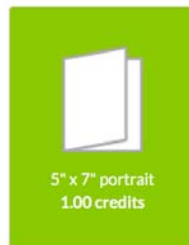
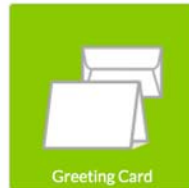
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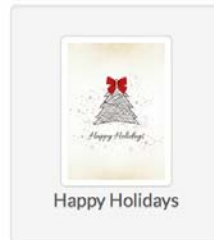
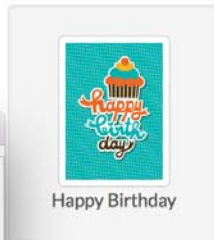
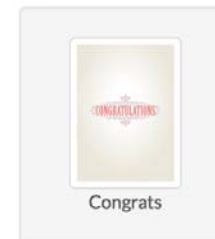
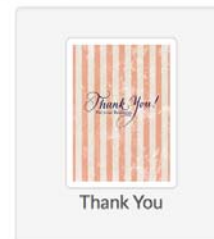
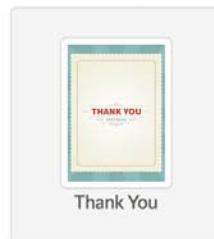
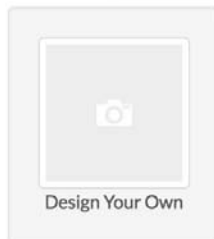
Step 3: Create and Design Mailers

CHOOSE A MAILER



SELECT A TEMPLATE

Categories: [Show All](#) [Congratulations](#) [Happy Birthday](#) [Holiday](#) [Thank You](#)



1) Select Mailer Type & Design Template

2) Customize Design with Text & Photos

3) Preview and Complete Project

Preview >

Complete Project

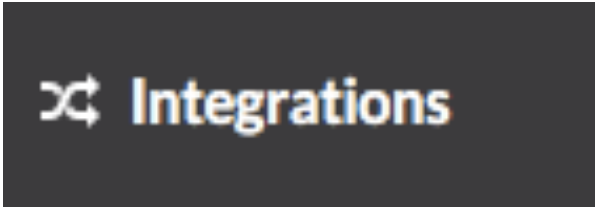
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Step 4: Create Action in Marketo Integration

1) Click on the “Integrations” tab from the main menu

A dark grey rectangular button with a white circular icon containing two curved arrows and the word "Integrations" in white text.

Integrations

2) Select the green “Configure” button under “Marketo” logo

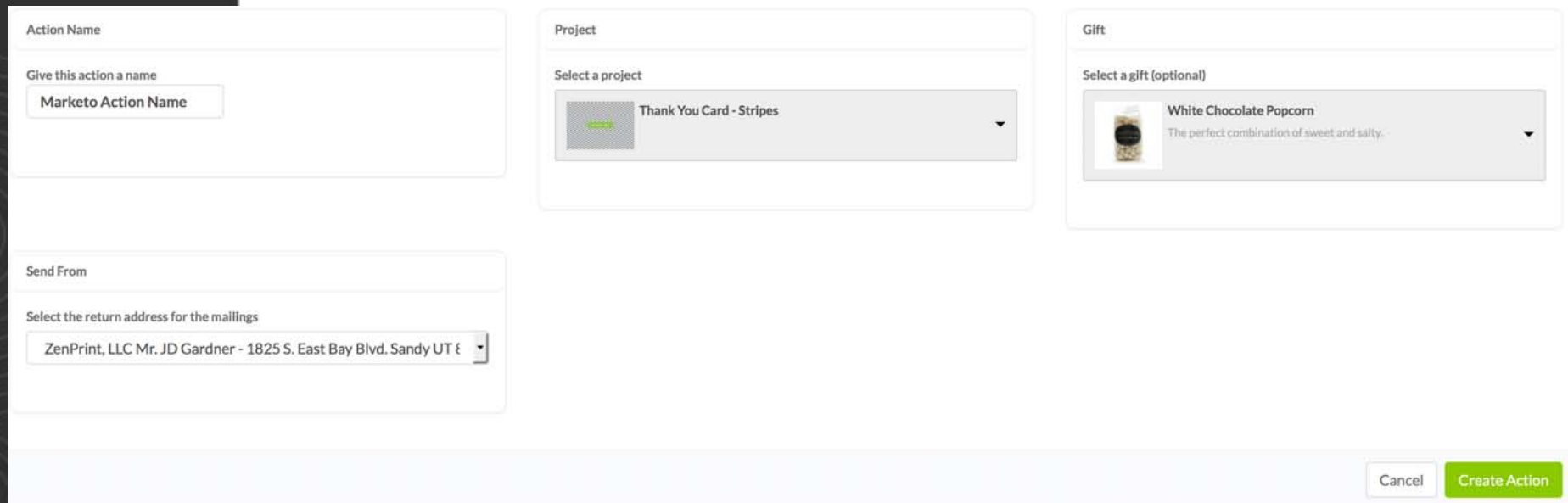


Step 4: Create Marketo Webhook URL Action

First, click on the on the Create a New Action button.

Create a New Action

1) Name Action. Select Project, Gift and Return Address and then hit Create Action button



Action Name

Give this action a name

Marketo Action Name

Project

Select a project

Thank You Card - Stripes

Gift

Select a gift (optional)

White Chocolate Popcorn
The perfect combination of sweet and salty.

Send From

Select the return address for the mailings

ZenPrint, LLC Mr. JD Gardner - 1825 S. East Bay Blvd. Sandy UT

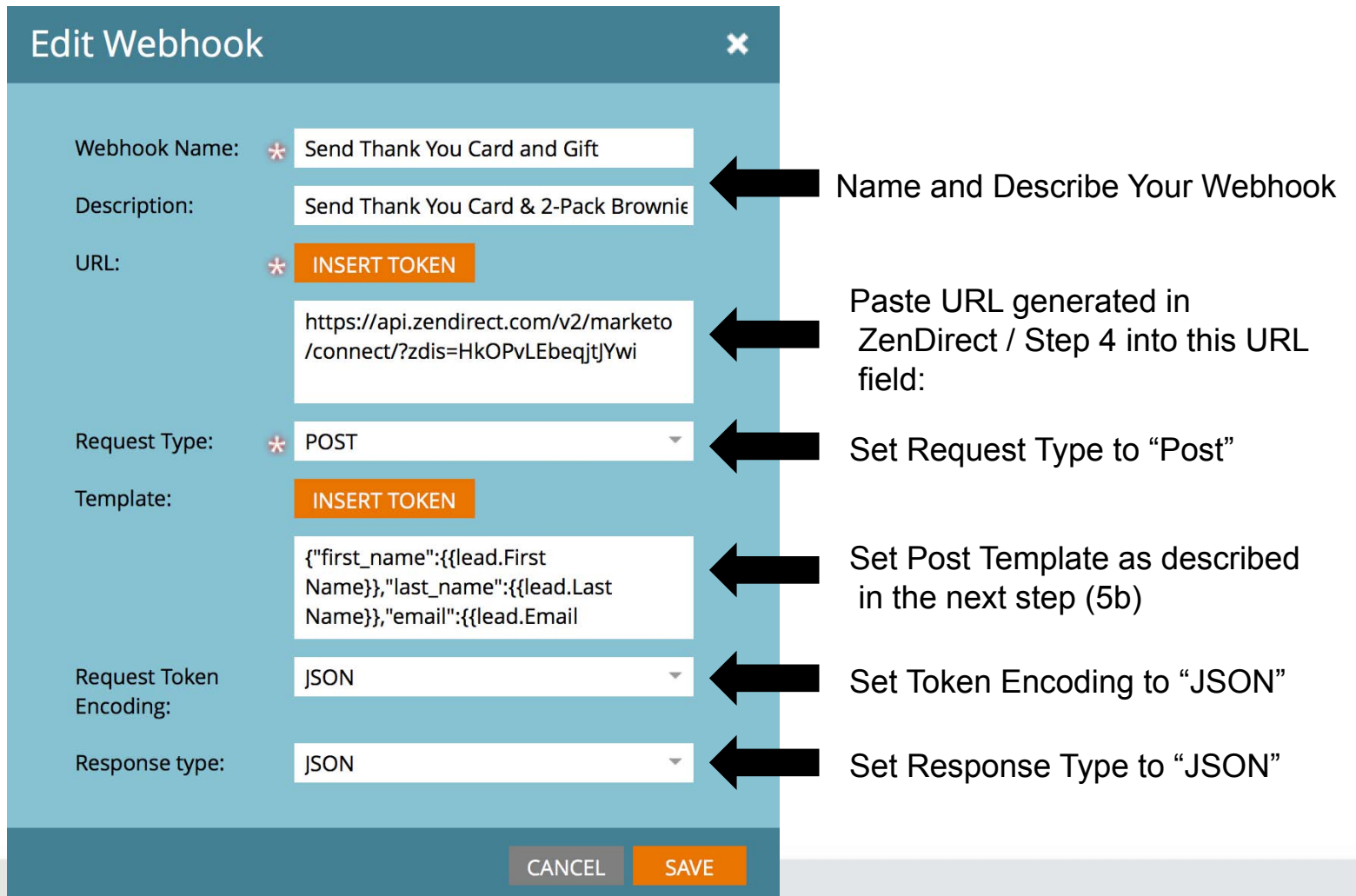
Cancel Create Action

2) Now, copy the generated Webhook URL, so it can be pasted into Marketo

<https://api.zendirect.com/v2/marketo/conne>

Step 5a: Configure Webhook in Marketo

1) Under Admin, Click on Webhooks. Next click the New Webhook Tab. Then, configure Webhook as described below and Click Create.



The screenshot shows the 'Edit Webhook' form in Marketo. The form fields and their values are as follows:

- Webhook Name:** Send Thank You Card and Gift
- Description:** Send Thank You Card & 2-Pack Brownie
- URL:** `https://api.zendirect.com/v2/marketo/connect/?zdis=HkOPvLEbeqjtjYwi`
- Request Type:** POST
- Template:** `{"first_name":{{lead.First Name}}, "last_name":{{lead.Last Name}}, "email":{{lead.Email}}`
- Request Token Encoding:** JSON
- Response type:** JSON

Annotations with arrows point to the following fields:

- Name and Describe Your Webhook:** Points to the Webhook Name and Description fields.
- Paste URL generated in ZenDirect / Step 4 into this URL field:** Points to the URL field.
- Set Request Type to "Post":** Points to the Request Type dropdown.
- Set Post Template as described in the next step (5b):** Points to the Template field.
- Set Token Encoding to "JSON":** Points to the Request Token Encoding dropdown.
- Set Response Type to "JSON":** Points to the Response type dropdown.

At the bottom of the form, there are two buttons: **CANCEL** and **SAVE**.

Step 5b: Configure Webhook in Marketo

1) Post Template should be set as follows:

Edit Webhook
✕

Webhook Name: *

Description:

URL: * INSERT TOKEN

Request Type: *

Template: INSERT TOKEN

Request Token Encoding:

Response type:

CANCEL
SAVE

Copy and Paste this into Template:

```

{"first_name":{{lead.First
Name}}, "last_name":{{lead.Last
Name}}, "email":{{lead.Email
Address}}, "company"
:{{company.Company Name}},
"phone":{{lead.Phone
Number}}, "street"
:{{lead.Address}}, "city"
:{{lead.City}}, "state"
:{{lead.State}}, "zip":{{lead.Postal
Code}}, "country"
:{{lead.Country}}
    
```



* Click Insert Token to add/link custom data fields as needed.

Step 5b: Configure Webhook in Marketo

1) You can use up to 11 additional data fields from Marketo as follows:

Edit Webhook
✕

Webhook Name: *

Description:

URL: * INSERT TOKEN

Request Type: *

Template: INSERT TOKEN

Request Token Encoding:

Response type:

CANCEL
SAVE

Copy and Paste this into Template:

```

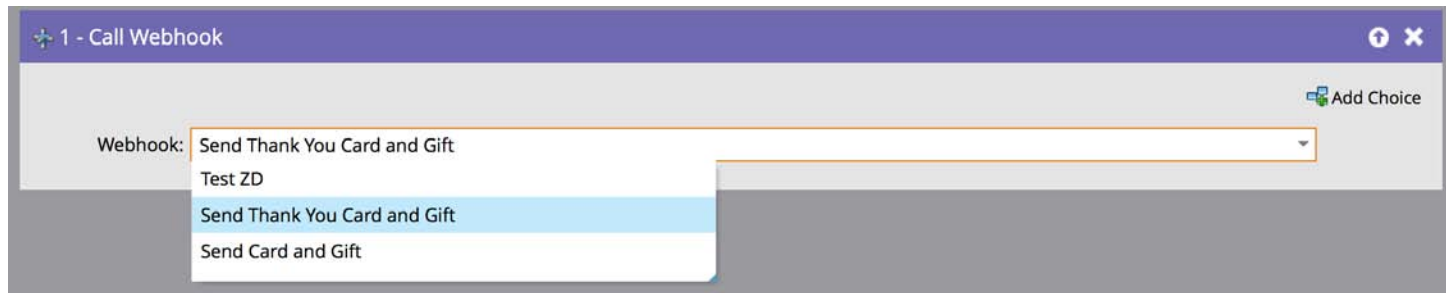
{"first_name":{{lead.First Name}}, "last_name":{{lead.Last Name}}, "email":{{lead.Email Address}}, "company":{{company.Company Name}}, "phone":{{lead.Phone Number}}, "street":{{lead.Address}}, "city":{{lead.City}}, "state":{{lead.State}}, "zip":{{lead.Postal Code}}, "country":{{lead.Country}}, "CUSTOM1":"","CUSTOM2":"","CUSTOM3":"","CUSTOM4":"","CUSTOM5":"","CUSTOM6":"","CUSTOM7":"","CUSTOM8":"","CUSTOM9":"","CUSTOM10":"","MESSAGE":""}

```

* Click Insert Token to add/link custom data fields as needed. Replace "" above with selected Token. Use [[Custom1]] in design.

Step 6: Call Webhook in Smart Campaign Flow

1) Select “Send Thank You Card and Gift” Webhook from the drop down menu



Congrats! You are now good to go. Any lead in this smart campaign who triggers this Webhook, will be sent the specified personalized physical mailer & gift from ZenDirect. Orders are printed and mailed out on the next business day.

Step 7: Verify Successful ZenDirect Order

The My Account / Order History page shows all of your placed orders. You can verify everything looks exactly as you intended. If not, you have a limited window to cancel your order before it goes to print and receive a full refund.

 My Account / Order History

ORDERS

Order Date	Order Number	Status		
10/30/2015	113574	PENDING	View Invoice	Cancel Order



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Part 1: Marketo Webhooks Integration

Part 2: Marketo Alert E-mail Integration



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Step 1: Create Free ZenDirect Account



First name

Last name

Your email address

Type a password

Do you have an affiliate code?

Create my Account



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Step 2: Configure ZenDirect Account

For best results, we recommend you add a return address, add a valid credit card and enable auto-replenishment one-time in ZenDirect

1) Add a return address
(My Account / My Profile tab)

NEW RETURN ADDRESS

Company (Optional)

First Name Last Name


Street Street 2

City State Postal Code

Country
United States

2) Add a valid credit card
& Enable auto-replenishment
My Account / Billing Info tab

ADD A NEW CARD



Credit Card Number

Expiration Date Security Code

Billing first name Billing last name

Street address

City State Postal Code

United States

Save this card as my default payment

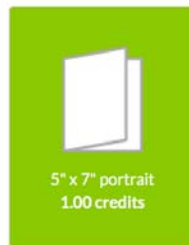
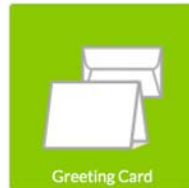
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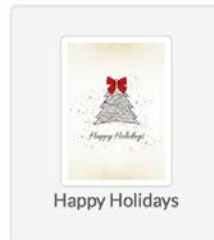
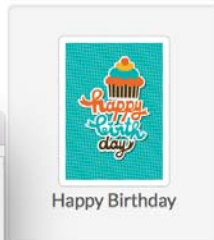
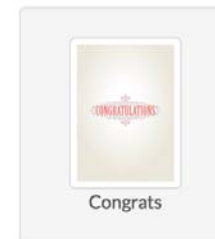
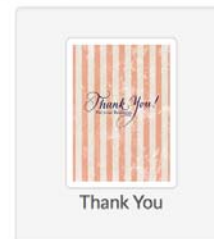
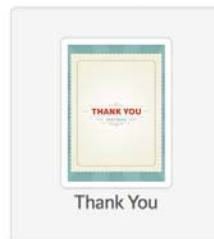
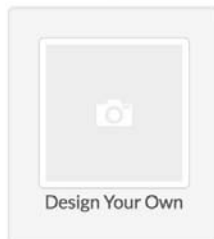
Step 3: Create/Design Mailers

CHOOSE A MAILER



SELECT A TEMPLATE

Categories: [Show All](#) [Congratulations](#) [Happy Birthday](#) [Holiday](#) [Thank You](#)



1) Select Mailer Type & Design Template

2) Customize Design with Text & Photos

3) Preview and Complete Project

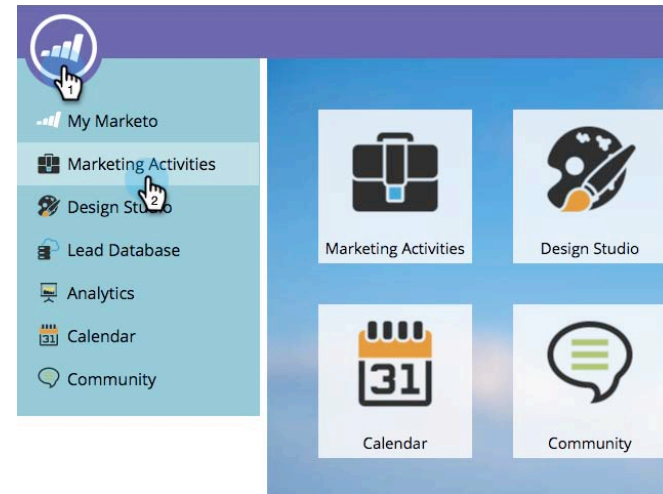
Preview >

Complete Project

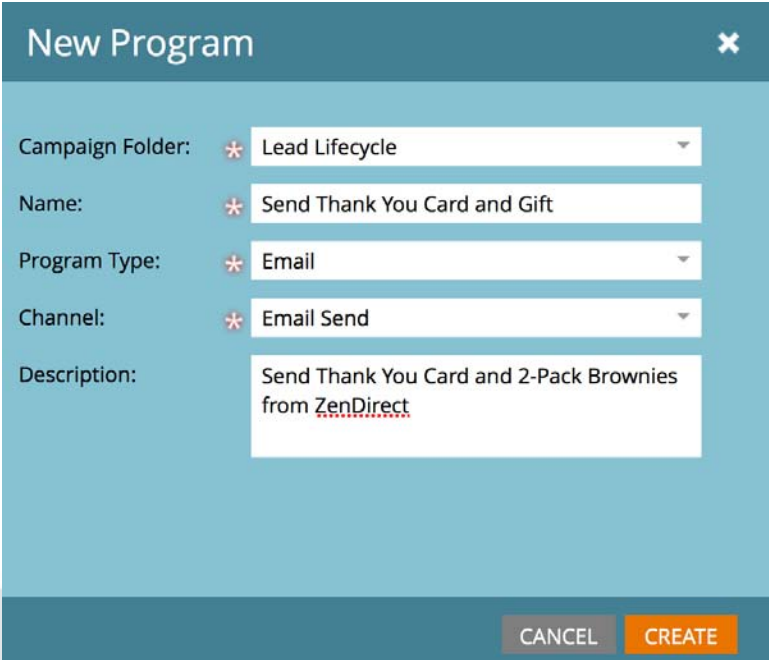
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Step 4a: Create Text-Only Marketo Alert E-Mail

1) Go to Marketing Activities Area & Click New Program button:

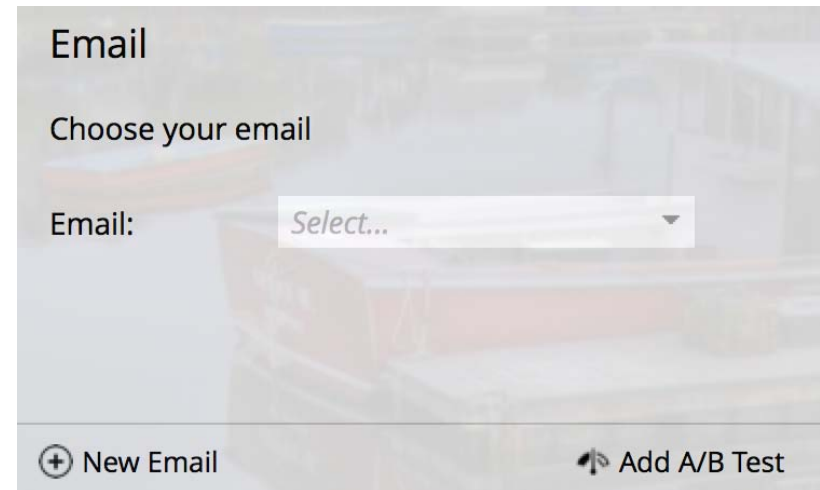


2) Name & Describe Program. Set Program Type to E-mail. Set the Channel to E-mail Send. Then, click the CREATE button.

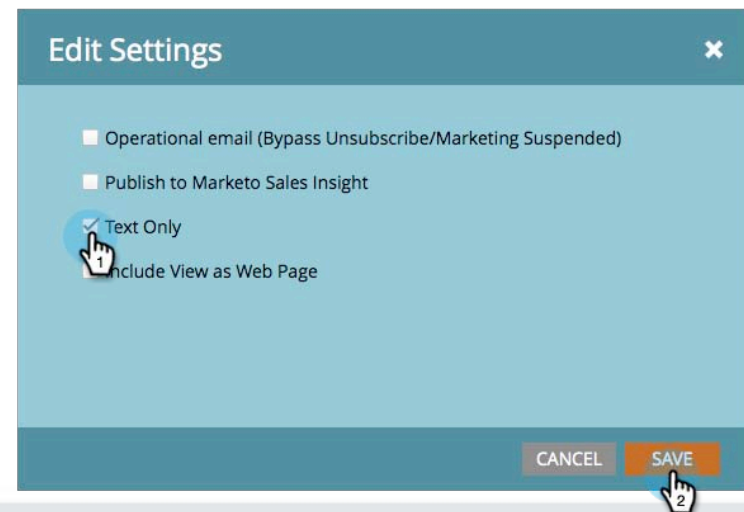
A screenshot of the 'New Program' form in Marketo. The form has a teal header with the title 'New Program' and a close button. The fields are: 'Campaign Folder:' with a dropdown menu set to 'Lead Lifecycle'; 'Name:' with a text input field containing 'Send Thank You Card and Gift'; 'Program Type:' with a dropdown menu set to 'Email'; 'Channel:' with a dropdown menu set to 'Email Send'; and 'Description:' with a text area containing 'Send Thank You Card and 2-Pack Brownies from ZenDirect'. At the bottom right, there are two buttons: 'CANCEL' and 'CREATE'.

Step 4b: Create Text-Only Marketo E-Mail (cont.)

3) Then, click the New E-mail button. Name E-Mail and Select Template: Blank. Then click CREATE button.



4) Select Edit Draft, and then Edit Settings, Click the Text Only check-box & Save.



Step 4c: Create Text-Only Marketo E-Mail (cont.)

5) Now copy and paste from the e-mail template on the next page into body, add your key, project ID, add optional gift ID & custom variables, and edit optional personalized message as desired. Save & approve e-mail once it's 100% ready to send!

Edit Section 📄 ✕

Section Name: Segmentation:

HTML **Text**

📄 Copy from HTML ↶ ↷ Ω 📄 {...}

Key: KDXG9GDYXRTZ
Project ID: 104191
Gift ID: 20
Recipient First Name: {{Lead.First Name}}
Recipient Last Name: {{Lead.Last Name}}
Recipient Company Name: {{Company.Company Name}}
Recipient Address 1: {{Company.Address}}
Recipient City: {{Company.City}}
Recipient State: {{Company.State}}
Recipient Postal Code: {{Company.Postal Code}}
Recipient Country: {{Company.Country}}
Message: Dear {{Lead.First Name}}

Thanks for the awesome meeting this week.

We are very impressed with {{Company.Company Name}}'s capabilities, and we look forward to working with you and your team!

Sincerely, Robert Higgins



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Step 4c: Create Text-Only Marketo E-Mail (cont.)

8) Copy and paste this info into the body of the Marketo text-only e-mail:

Key: (ADD YOUR SECRET E-MAIL KEY FROM ZENDIRECT HERE)

Project ID: (ADD PROJECT ID OF YOUR MAILER PROJECT HERE)

Gift ID: (ADD OPTIONAL GIFT ID FROM ZENDIRECT HERE)

Recipient First Name: {{Lead.First Name}}

Recipient Last Name: {{Lead.Last Name}}

Recipient Company Name: {{Company.Company Name}}

Recipient Address 1: {{Company.Address}}

Recipient City: {{Company.City}}

Recipient State: {{Company.State}}

Recipient Postal Code: {{Company.Postal Code}}

Recipient Country: {{Company.Country}}

Message: Dear {{Lead.First Name}}

Thanks for the awesome meeting this week.

We are very impressed with {{Company.Company Name}}'s capabilities,
and we look forward to working with you and your team!

Sincerely, Robert Higgins

Key: You'll find your secret key in the e-mail integrations tab, click configure under e-mail icon. You will need to create a secret key initially before using the e-mail integration

Project ID: You'll find the project ID in the My Projects tab. Use the ID # for any completed Project. Make sure to save/complete Projects before incorporating into Marketo campaign

Gift ID: You'll find a list of gift IDs in e-mail integrations tab and on the next page

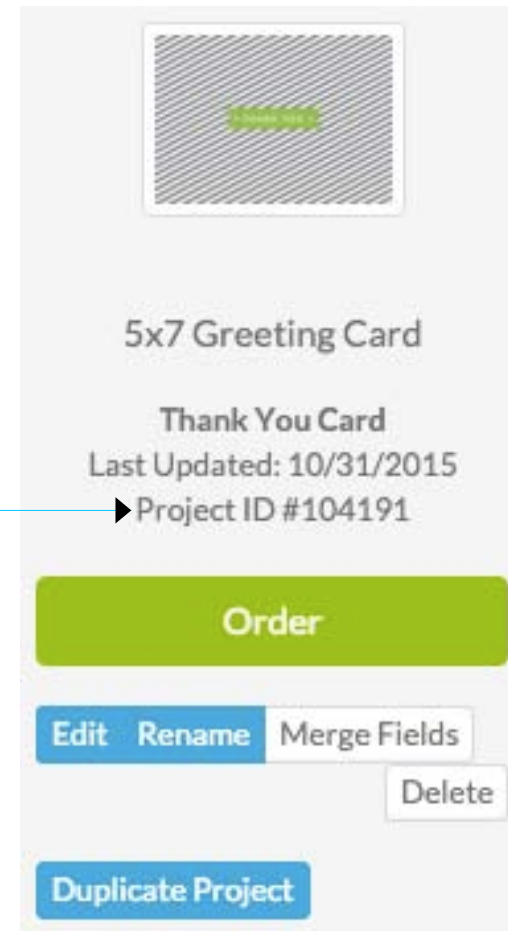
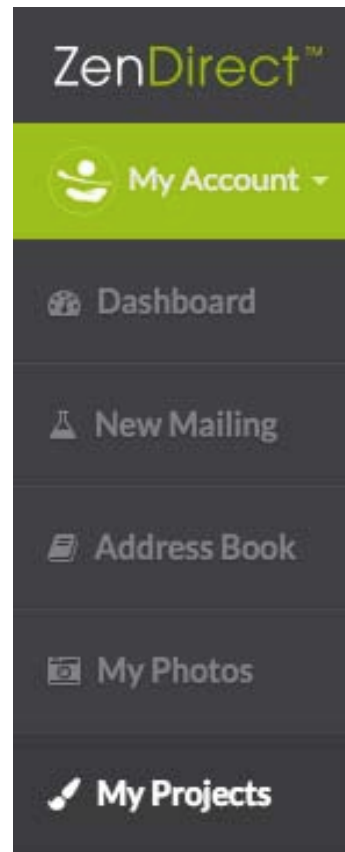
Return Address: ZenDirect uses your default return address unless specified in the e-mail body

Message: Each message is customizable, but should not exceed 255 characters. Make sure your ZenDirect design / project includes the [[MESSAGE]] field if you plan to use it.

Custom Variables: You can add up to 10 custom variables [[Custom1]] to [[Custom10]] in mailers.

Step 4c: Create Text-Only Marketo E-Mail (cont.)

Go to “My Projects” in ZenDirect and jot down the Project ID you want to use with this Campaign. In this case, “Project ID: 104191” goes in the e-mail body





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Step 4c: Create Text-Only Marketo E-Mail (cont.)

Attach Optional Gift
Using these Gift IDs:



\$5 Starbucks Gift Card - ID: 5
\$10 Starbucks Gift Card - ID: 6
\$25 Starbucks Gift Card - ID: 7
2-pack Chocolate Brownies - ID: 20
4-pack Chocolate Brownies - ID: 21
2-pack MegaBite Milk Chocolate Chunk - ID: 23
2-pack MegaBite Dark Chocolate Chunk - ID: 24
2-pack MegaBite Cinnamon Sugar - ID: 25
2-pack MegaBite Raisin Oatmeal - ID: 26
2-pack MegaBite White Chocolate Macadameia - ID: 27
MegaBite 5 Pack (all flavors) - ID: 28
AvenueSweets Caramel Trio - ID: 31
AvenueSweets Sea Salt Caramels - ID: 32
AvenueSweets Chocolate Almonds - ID: 34
AvenueSweets Gummi Bears - ID: 35
AvenueSweets Chocolate Pretzles - ID: 36
AvenueSweets Yogurt Pretzles - ID: 37
\$10 Target Gift Card - ID: 41
\$25 Target Gift Card - ID: 42
\$50 Target Gift Card - ID: 43
\$10 Amazon Gift Card - ID: 49
\$25 Amazon Gift Card - ID: 50
\$50 Amazon Gift Card - ID: 51
\$25 Amex Gift Card - ID: 53
\$50 Amex Gift Card - ID: 54
\$100 Amex Gift Card - ID: 56
\$10 iTunes Gift Card - ID: 57
\$25 iTunes Gift Card - ID: 59
\$1 Bill Cash - ID: 63
\$100 Amazon Gift Card - ID: 67
Seasonal Popcorn - ID: 84
Caramel Popcorn - ID: 86
Cheddar Cheese Popcorn - ID: 87
White Chocolate Popcorn - ID: 88

Step 5a: Create an Alert Trigger Smart Campaign

1) Under Marketing Activities, click New Smart Campaign:

Smart Campaigns

- Build and execute batch campaigns
- Manage, nurture, and score leads
- Automate marketing processes

NEW SMART CAMPAIGN

2) Name and describe the campaign and click the CREATE button.

New Smart Campaign

Campaign Folder: * Lead Lifecycle

Campaign Name: * Send Thank You Card and Gift with Alert E-Mail

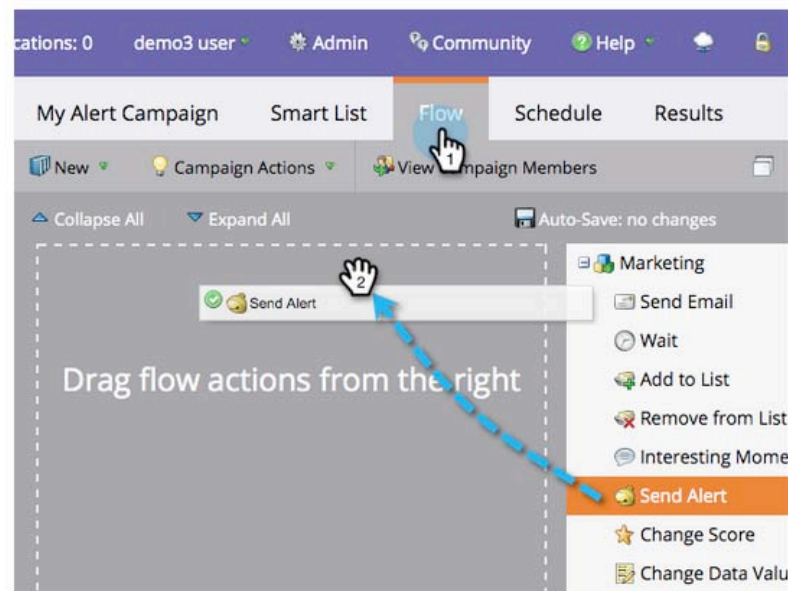
Description: Send Thank You Card and Gift with Alert E-Mail

CANCEL

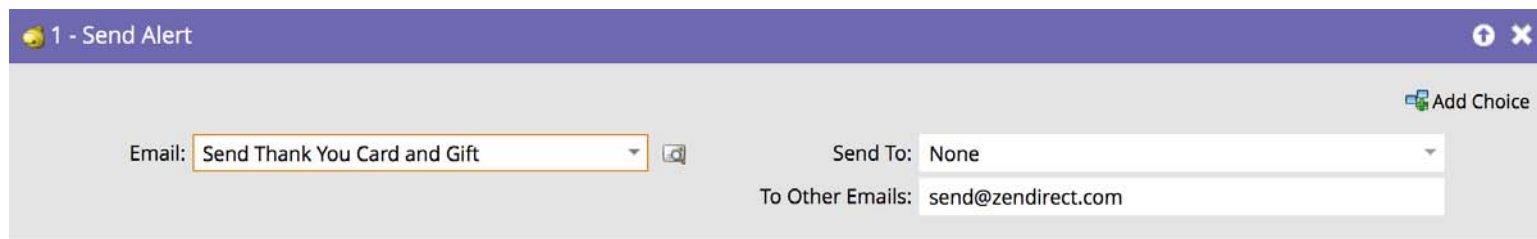
CREATE

Step 5b: Create an Alert Trigger Smart Campaign

3) Under the Flow tab, find and drag the Send Alert flow action to the canvas.

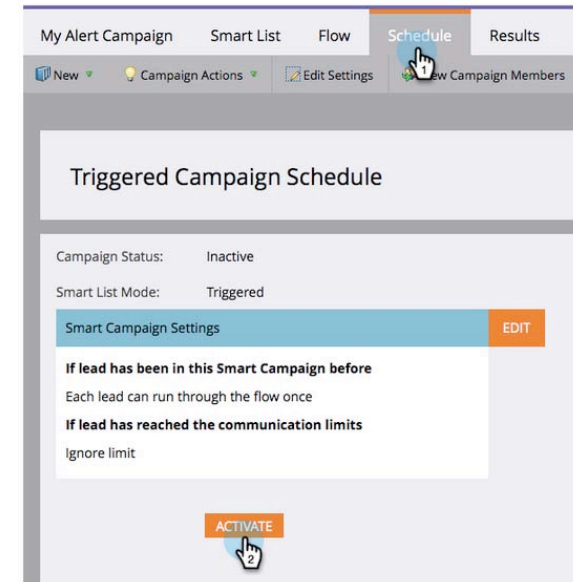


4) Select E-Mail Template, and set the Send To: to “None”. Set the To Other E-Mails field to “send@zendirect.com”.

A screenshot of the 'Send Alert' configuration form. The form has a purple header with '1 - Send Alert' and a close button. Below the header, there is an 'Add Choice' button. The form contains three fields: 'Email' with a dropdown menu set to 'Send Thank You Card and Gift', 'Send To' with a dropdown menu set to 'None', and 'To Other Emails' with a text input field containing 'send@zendirect.com'.

Step 5c: Create an Alert Trigger Smart Campaign

5) Go to the Schedule tab and click the Activate button.



6) Click Activate on the confirmation screen and you're good to go. Now any lead in this smart campaign who triggers this action, will be sent the personalized physical mailer & gift specified in the e-mail.





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The My Account / Order History page shows all of your placed orders. You can verify everything looks exactly as you intended. If not, you have a limited window to cancel your order before it goes to print and receive a full refund.

 My Account / Order History

ORDERS

Order Date	Order Number	Status		
10/30/2015	113574	PENDING	View Invoice	Cancel Order

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