

## What does the Marketo integration do?

The Marketo integration in Ceros allows you to track individual page views of Ceros experiences and add Marketo forms directly from the Ceros studio. By using our built in integration, you can:

- Easily add formatted Marketo forms to any Ceros experience
- Have specific actions triggered within Ceros based on a form submission
- Send pageviews for any individual (known or anonymous) to your Marketo instance
- Trigger marketing automation activities like nurture emails based on the user's activity with your Ceros Experiences

## How do I setup the Marketo integration for both activity tracking and form integration?

Follow the below steps to get the Marketo integration set up in Ceros. If you don't have access to Marketo in the integrations tab in Ceros — be sure to reach out to your Account Manager.

1. Login to your Marketo account and navigate to "Admin"
2. Under "Users and Roles" select "Invite New User"
3. Fill out the necessary information in "Step 1: Info"

The screenshot shows the Ceros Admin interface with the 'Invite New User' dialog box open. The dialog has three steps: Step 1: Info, Step 2: Permissions, and Step 3: Message. The 'Info' step is active. The fields are as follows:

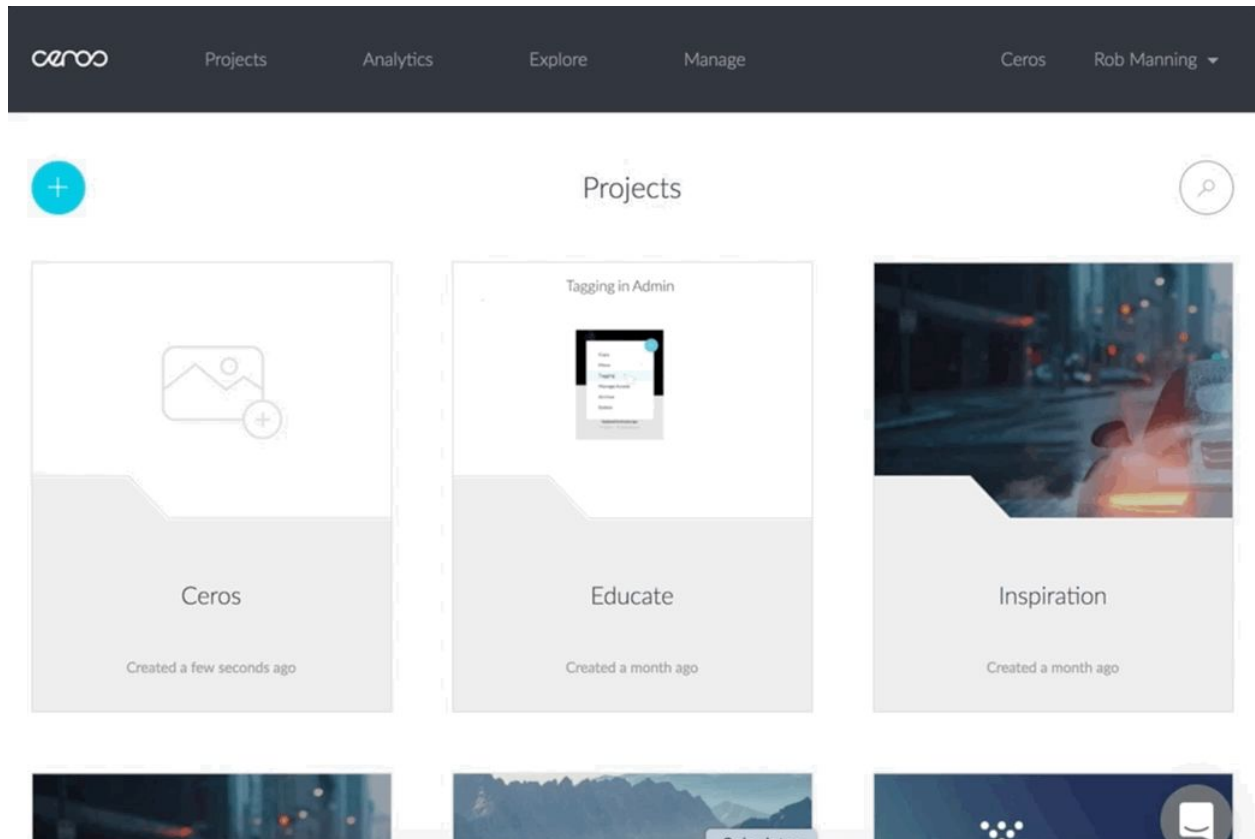
| Field          | Value               |
|----------------|---------------------|
| Email          | youremail@email.com |
| User ID        | youruserID          |
| First Name     | First Name          |
| Last Name      | Last Name           |
| Reason         | Ceros API Access    |
| Access Expires | Never               |

At the bottom of the dialog are 'CANCEL' and 'NEXT' buttons. The background shows the Admin menu with 'Users & Roles' selected.

4. In the Permissions section, select "API Only" and click next until you exit the dialogue.
5. Navigate back to the Admin menu and select "LaunchPoint"
6. Click on "New" > "New Service" and fill in the display name (e.g. "Ceros API Service")
7. Under service select "Custom"

9. Add a description for the service, and select the recently created API only user from the dropdown list
10. Once created select "View Details" to get the "Client Id" and "Client Secret". Save both of these items as we will use them in a later step.
11. Finally, navigate back to the Admin menu and select "Munchkin"
12. Copy the "Munchkin Account Id"

You're now ready to set up the integration within Ceros. Navigate to the [Ceros Admin](#) and login to your account.



1. Navigate to Account > Integrations in Ceros
2. Toggle "Marketo" integration button
3. Paste your Munchkin Account ID, Marketo Client Id, and Marketo Secret and hit save

*Note: If you want to apply to all existing experiences, toggle the checkbox on*

## How do I setup the Marketo integration on a single experience?

For ONLY Page View Tracking

1. Click on the project containing the experience you'd like to track in Marketo
2. Click the Integrations cog icon on the specific experience
3. Paste your Munchkin Account ID and hit save

For Page View Tracking and Forms Integration

1. Click on the project containing the experience you'd like to track or add Marketo forms to
2. Click the Integrations cog icon on the specific experience
3. Paste your Munchkin Account ID, Marketo Client ID, and Marketo Secret and hit save

*Note: by setting up your Marketo integration at the account level, you'll automatically have your experiences tracked in Marketo when they are created.*

## How do I add a Marketo form?

Once the Marketo integration is all set up, a Marketo icon will appear in the studio toolbar. This is where you can launch the Form Chooser which enables you to browse, search and preview existing Marketo Forms. To add forms to Ceros:

1. Locate the Marketo Form Chooser at the top of your toolbar
2. When you locate your form, click "Add" to bring that particular form into the Ceros Studio
3. Preview and test the form.

**Note:** if you have already added a form to your canvas, and later update that form in Marketo – the studio and preview will need to be refreshed to have those changes reflected.

## On Form Submit Interactions

You can create customized follow-ups for when a user submits a Marketo form right within the studio using built in Ceros Interactions. To get started, selected the form object on the canvas and navigate to the Interactions tab of the Inspector Panel.

### Enable and disable pages to create Gated Content

You can create Gated Content within Ceros by using Enable/Disable page Interactions.

1. After designing all of your pages, disable the pages you want to be gated by clicking the arrow in the page selector and selecting "Disable."
2. Once disabled, the page will appear greyed out in the page navigator. Disabled pages will not be navigable until an interaction enables them – e.g. *On form submit > Enable page x.*
3. With the form still selected, navigate to the Interaction panel and set up an "On Submit" > "Enable Pages".
4. Enter individual page numbers, separated by a comma, and/or a range of pages into the Enable page field.
5. Click update.

**Note:** All of the other interactions such as page navigation, show, hide, etc. will behave just as they normally would. [Click here](#) to learn more about Ceros interactions.

## When your form is live

Forms are live in your Experience preview as well as your published experience. If you enter information and submit the form in the Experience preview, the information will still be sent to Marketo.

## **Disconnecting your Marketo Account**

You can disconnect Ceros from your Marketo account at any time by deactivating the toggle in the Integrations panel. Users will no longer be able add or replace forms in the studio. The form chooser will no longer be available. Users will still be able to move, edit, preview and publish forms that are already existing in any Experiences.