

Marketo Integration

In order for iCapture to communicate with your Marketo Platform an integration must be created. The integration allows iCapture to send the data over to Marketo without any user intervention. This step must be completed prior to sending your data to your integration.

How does the iCapture integration into Marketo work?

iCapture has a native Automated Programming Interface (API) built into Marketo which allows data to be sent automatically from the iCapture apps & servers to Marketo. This type of integration is the most direct and seamless integration - reducing the amount of human interaction and error that could occur with 3rd party integrations.

How is the Integration Setup?

In order for iCapture to push captured data to your Marketo account, first access has to be granted to the iCapture apps & servers. Then the next step is creating the integration.

Step 1: Allowing Access To Your Marketo Account (Click [here](#) for details for allowing access to Marketo)

- Create a new Role (API Role) and add all 'Access API' permissions to this new role.
- Create a new User (API User) and add this User to the newly created 'Access API' Role.
- Create a new Custom Service (My Rest Service) and add the new User created above as the API Only User (the dropdown will show the email address of the newly created user).
- Once your 'My Rest Service' is created, you can view this services details which will show the Client ID and Client Secret needed for iCapture to send data to your account -- enter these values in the form above.
- Your Munchkin Account ID can be found at Admin > Integration > Munchkin -- enter this value in the form above.

Step 2: Create your integration

1. Log in to your [Back Office](#)
2. Click My Account at the top of the page
3. Click Integrations
4. Click on Setup a New Integration



5. Name the Integration Account and select "Marketo" in the "Select Your Integration/Service Provider" and click **Submit and Continue**

Name to Identify this Integration Account:

Select Your Integration / Service Provider:

Submit and Continue >

6. Enter your Client ID
7. Enter your Client Secret
8. Enter your Munchkin Account ID

Your Marketo Account Info

Please enter your Marketo Account information

Integration Name



ClientID



Client Secret



Munchkin Account ID



Save

Save & Back

Back

9. Click Save & Back
10. Now that the integration has been created, you must now set your list assignment and map your data in order for your data to be sent to your email marketing, CRM or Marketing Automation Platform.

Create your list assignment

1. Return to the Questionnaire Overview page and click on **Edit Questionnaire** to enter the questionnaire builder
2. Click on **Integrations** at the top of the page

Questions & Fields

Settings

Integrations

Emails

Notifications



3. In the Click Here to Select Integration dropdown select your Marketo integration and click **Add List Assignment**

Send Captures to your Integration

Every capture for this questionnaire will be sent to these integration assignments.
Advanced Rules may also be created to filter captures.

iCapture Marketo Acct - Marketo

Add List Assignment

4. Select the de-duplication setting, partition, campaign and list that you would like to send this data to from this assignment

How should we handle lead captures?

Create or Update Lead

Select Leads List:

None

Select Partition:

None

Select Campaigns:

None

Create List Assignment

5. Click **Create List Assignment**

Note: List assignments must be done prior to capturing data!

Map your data fields

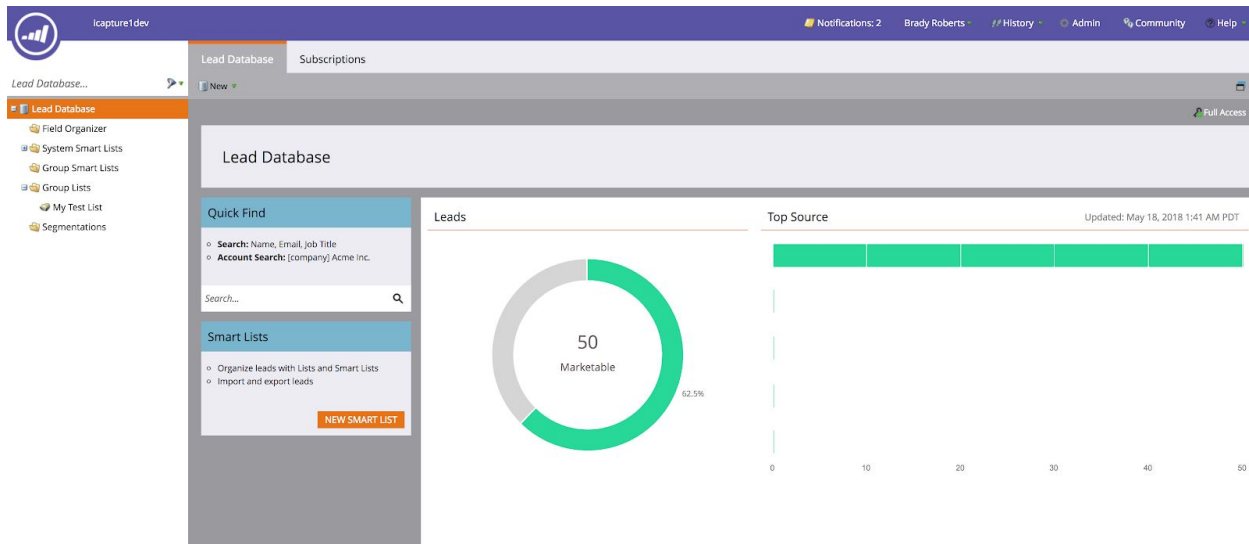
1. On the Integration tab of the questionnaire builder click on Map Data Fields
2. On the left side of the page are the merge fields available from your questionnaire
3. On the right side of the page are the fields returned from your integration
4. Select the merge field and drag it over to the right and drop it in the field from your integration

When you have mapped all of your fields click **Submit Field Mapping** to save the mapping



What happens to captured data?

After a lead is captured on a mobile device with iCapture, that data is sent in real-time from the iCapture servers to Marketo. To view captured leads, simply go to the lead database in Marketo.



Can leads be segmented?

Leads can be segmented in Marketo by creating a Smart List. Smart Lists allow leads to be organized that meet specific criteria by applying filters. Criteria can be based on Lead Attributes, Company Attributes, Lead Interaction History, and many others.

The screenshot shows the Marketo Smart List interface. The top navigation bar includes 'Test', 'Leads', and 'Smart List'. The main area displays a table of lead data with columns for Id, Last, First, Job Title, Company, Email, Phone, Lead Status, Lead Source, and Updated. The table contains 23 rows of lead data. At the bottom, there is a pagination bar showing 'Page 1 of 1' and '0 selected'.

Id	Last	First	Job Title	Company	Email	Phone	Lead Status	Lead So...	Updated
605	Gutierrez	Robert			robert.gutierrez@icapture.com	20855522...			Jun 30, 2017 3:33...
606	Sterk	George			geogesterk@icapture.com	208554422			Jul 14, 2017 8:14 ...
607	Cypher	Bill			bill.cypher.01@icapture.com				Jul 14, 2017 10:1...
608	Cypher	Bill			bill.cypher.02@icapture.com				Jul 14, 2017 10:3...
609	Cypher	Bill			bill.cypher.03@icapture.com				Jul 14, 2017 11:0...
610	Cypher3	Bill3			bill.cypher.03@icapture.com				Jul 14, 2017 11:0...
611	Yeager	Chuck		Air Inc	chuck@icapture.com				Jul 14, 2017 12:4...
612	Tracy	Shane			shane@icapture.com				Jul 14, 2017 12:5...
613	Kong	King		Big Ape <=&	king.kong1@icapture.com				Jul 27, 2017 9:33 ...
614	Kong2	King2			king.kong2@icapture.com				Jul 27, 2017 9:46 ...
615	Kong3	King 3	Big Monkey <>		king.kong3@icapture.com				Jul 27, 2017 9:50 ...
616	Kong4	Kong4	Big Monkey <>		king.kong4@icapture.com				Jul 27, 2017 10:3...
617	Kong6	King6			king.kong.6@icapture.com				Jul 27, 2017 3:22 ...
618	Duck	Donald		DD Inc	donald.1@icapture.com				Aug 14, 2017 1:5...
619	Mouse	Mickey	Head Cheese	Mickey Mouse Inc	mickey.mouse.0099@icapture.com				Aug 15, 2017 3:1...
620	Mouse	Mickey	Head Cheese	Mickey Mouse Inc	mickey.mouse.066@icapture.com				Aug 15, 2017 4:0...
621	Thompson	Emma			emmathompson@icapture.com	98738115...			Oct 4, 2017 9:42 ...
622	Reed	Benjamin			benjaminreed@icapture.com	98738115...			Oct 4, 2017 9:51 ...
623	Reed	Benjamin			benjaminreed@icapture.com	98738115...			Oct 4, 2017 9:57 ...

After segmenting my leads into a Smart List, what is next?



The next step is to create a Smart Campaigns which is the engine that drives a set number of actions based on triggers and a pre-defined schedule. Smart Campaigns use Smart Lists to define who you want to target.

The screenshot displays the iCapture1dev interface for configuring a Smart Campaign. The main content area is titled "Test Smart Camp 2" and is divided into four steps:

- 1. Smart List - "Who"**: Define which leads this campaign will affect.
- 2. Flow - "What"**: Define campaign actions and steps.
- 3. Schedule - "When"**: Manage when the campaign is active.
- 4. Results - "Wow!"**: Track campaign progress.

On the right side, a summary panel provides details about the campaign's status and configuration:

- Status:** Triggered (Inactive)
- Qualification Rules:** [Each lead can run through the flow once](#)
- Created:** May 25, 2016 12:17 PM PDT
- Last Modified:** January 21, 2017 11:16 PM PDT
- Members:** -2
- Leads in Wait step:** Calculate
- Smart List (1):** Trigger - Campaign is ... Source is 'Web Service API'
- Flow (1):** Step 1 - Send Email Email: 'Send Emails to Pro Plan Prospects.Pro Plan Prospect - Email #1'
- Trigger Activation History (2):**

Date	Status
January 21, 2017 11:1...	deactivated
May 25, 2016 12:38 P...	activated

The interface includes a navigation menu on the left with categories like Marketing Activities, Data Management, and Lead Lifecycle. The top navigation bar shows the user's name (Brady Roberts) and various utility links like Notifications, History, Admin, and Help.

There are several steps, triggers and scheduling features that can be set up for your Smart Campaign. All of these features depend on the goals and objectives of your campaign as well as your process.

