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.

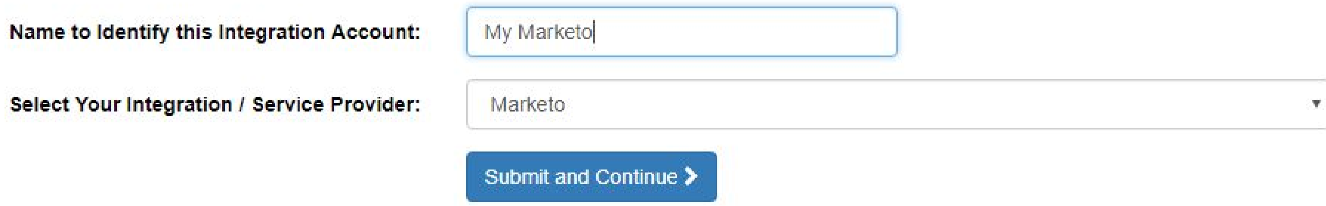
Step 1: Allowing Access To Your Marketo Account (Click here for details for allowing access to Marketo)

- 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.

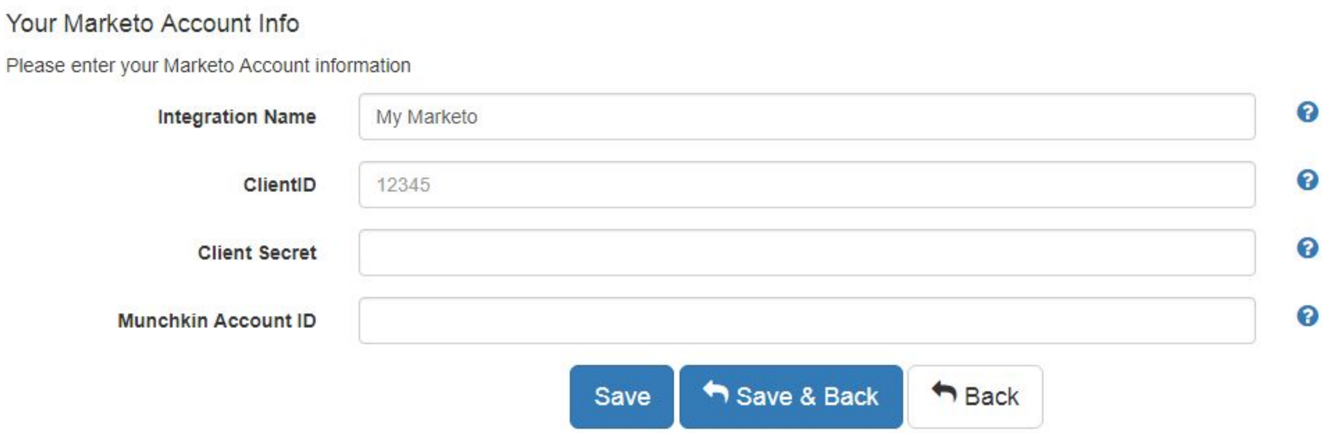
Step 2: Create your integration

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**



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

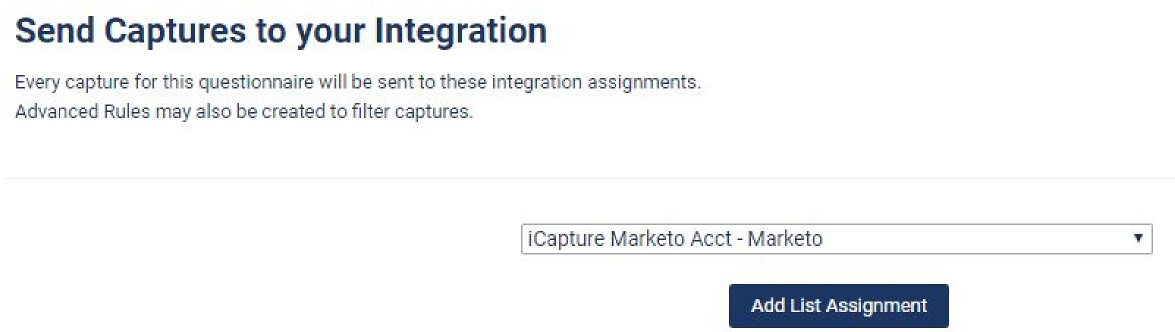


9. Click Save & Back
10. Now that the integration has been created, you must now set your list assignment and map your data in order for your data to be sent to your email marketing, CRM or Marketing Automation Platform.

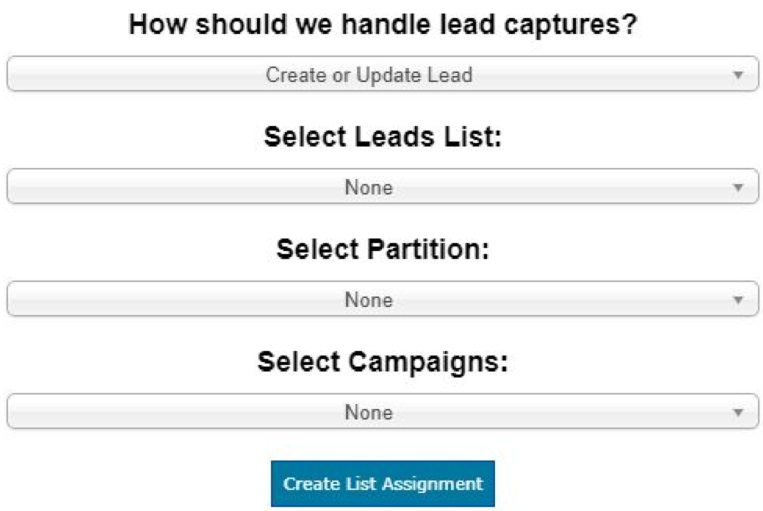
Create your list assignment

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

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



5. Click **Create List Assignment**

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

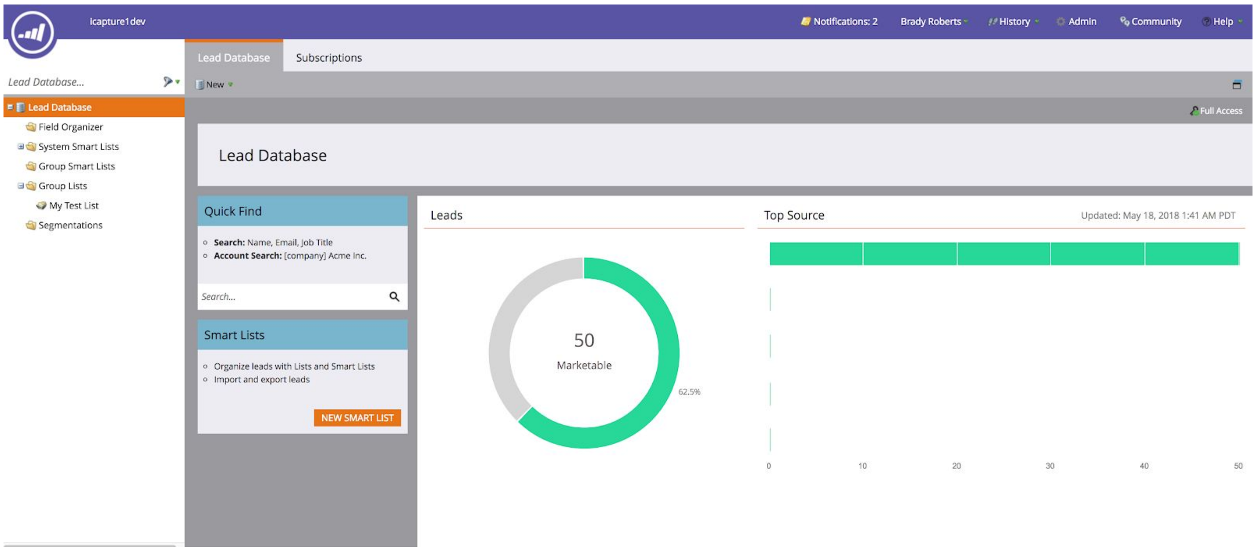
Map your data fields

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

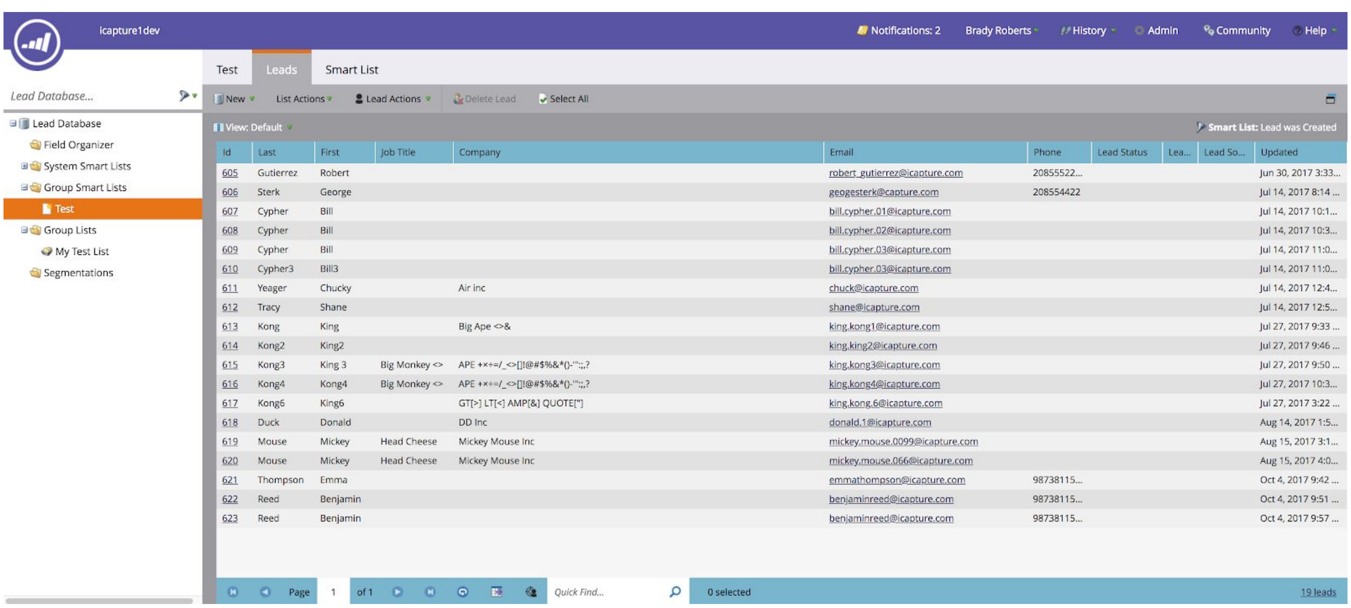
What happens to captured data?

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.



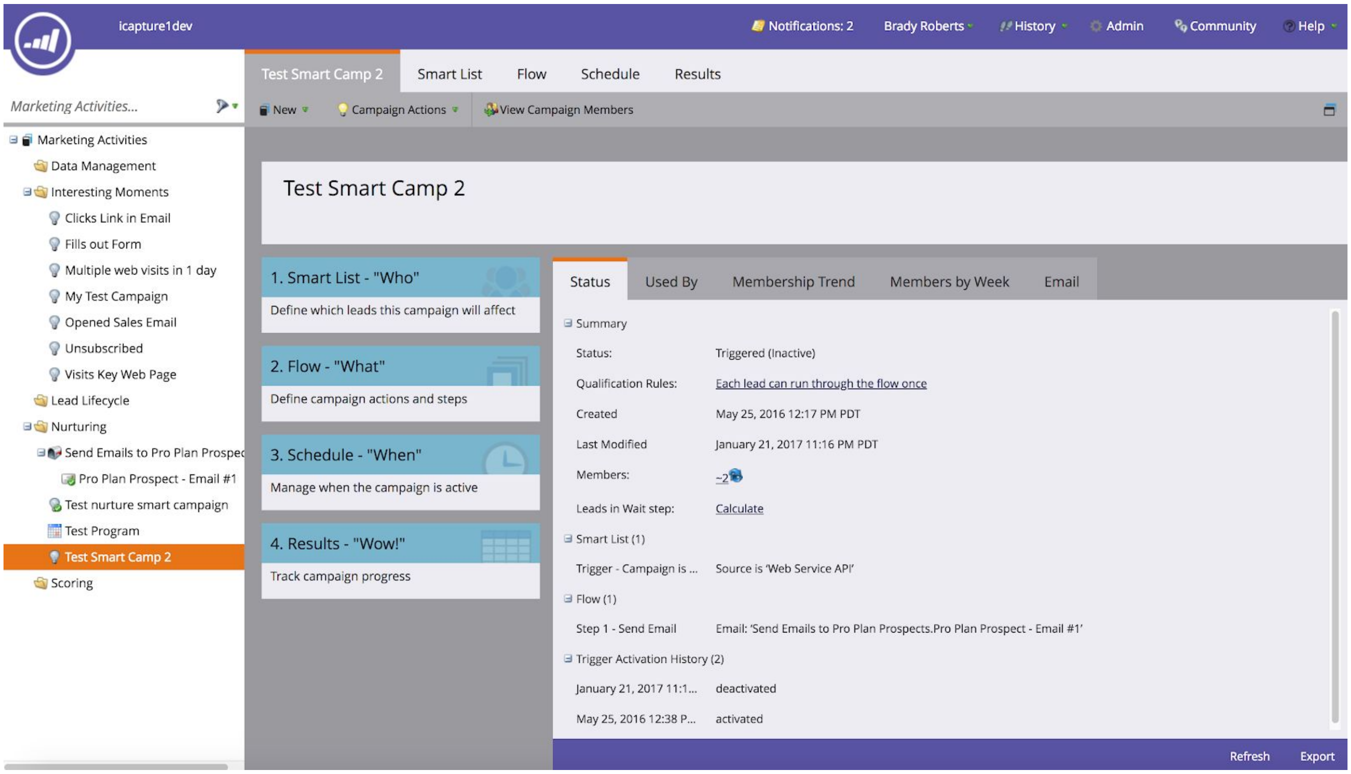
Can leads be segmented?

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.



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.



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.