

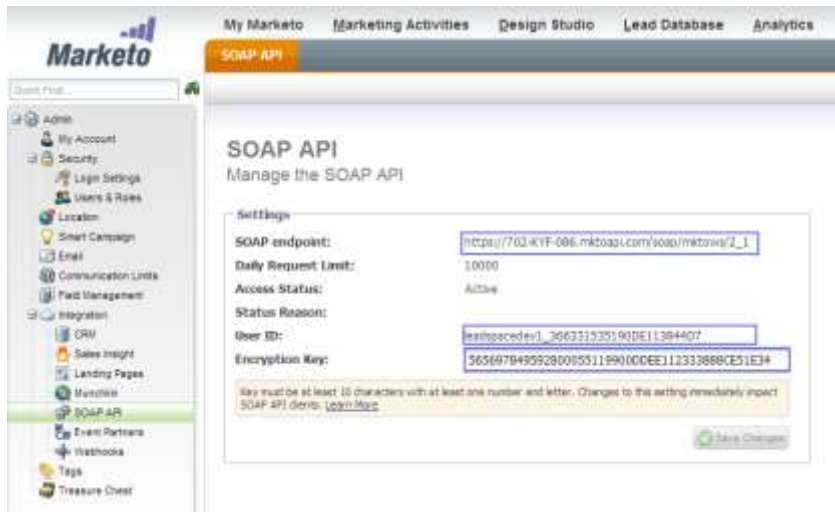
## Leadspace for Marketo Installation & Setup Instructions

Document version: October 6<sup>th</sup>, 2013

### Installation Prerequisites

Before prompting the installation, please make sure that:

- Your Leadspace **Ideal Customer Profile** was reviewed by our analysts and adapted specifically for the Marketo integration.
- You have **Admin Permissions** on your Marketo system.
- Send to [support@leadspace.com](mailto:support@leadspace.com) the following SOAP API data of your Marketo instance (On the “Admin Settings”, expand “Integration” and choose “SOAP API”):



### Field Customization for Leadspace Enriched Data

1. Please create the following fields on your Marketo instance for the Leadspace output data. If you are using Salesforce.com, you might want to create some, or all of the fields within Salesforce.com first. This will automatically create the fields in your Marketo database.

- To create the new Leadspace fields (see naming conventions in the table below), go to “Admin” -> “Field Management” -> “New Custom Field” (when done, click “create”).



- Set the field settings as they appear in the following table. In the screenshot below, you will find an example for the “LS First Name” field.

Please note, fields with an \* are mandatory for the Leadspace integration and fields with a \*\* are highly recommended.



Marketo API Field Name	Marketo Friendly Label	Marketo Field Type
* LSStatus	LS Status	String
* LSUpdated	LS Enrichment Date	Datetime
** LSTitle	LS Title	String
** LSLeadJobFunctions	LS Lead Job Functions	Text area
** LSLeadEmail	LS Lead Email	Email
** LSLeadPhone	LS Lead Phone	Phone
** LSVerified	LS Verified?	String
** LSLeadScore	LS Lead Score	String
** LSLeadLevel	LS Lead Level	String
** LSLeadCountry	LS Lead Country	String
** LSLeadDepartment	LS Lead Department	String
LSFirstName	LS First Name	String
LSLastName	LS Last Name	String

LSCompany	LS Company	String
LSCompany-OriginalInput	LS Company - Original Input	String
**LSCompanyScore	LS Company Score	String
LSTotalScore	LS Total Score	String
LSLeadState	LS Lead State	String
LSLeadProductsandTechnologies	LS Lead Products and Technologies	Text area
LSLeadLinkedinProfile	LS Lead Linkedin Profile	URL
LSLeadFacebookProfile	LS Lead Facebook Profile	URL
LSLeadTwitterProfile	LS Lead Twitter Profile	URL
**LSCompanyIndustry	LS Company Industry	String
**LSCompanySubIndustry	LS Company Sub Industry	String
**LSCompanySize	LS Company Size	Integer
LSCompanyDescription	LS Company Description	Text area
LSSIC-Primary	LS Primary SIC	String
LSSIC-Secondary	LS Secondary SIC	String
LSNAIC-Primary	LS Primary NAIC	String
LSNAIC-Secondary	LS Secondary NAIC	String
**LSCompanySize-Range	LS Company Size - Range	String
**LSCompanyRevenue	LS Company Revenue	Integer
LSCompanyRevenueRange	LS Company Revenue Range	String
**LSCompanyCountry	LS Company Country	String
LSCompanyState	LS Company State	String
LSCompanyCity	LS Company City	String
LSCompanyStreet	LS Company Street	String
LSCompanyZipcode	LS Company Zipcode	String
LSCompanyPhone	LS Company Phone	Phone
LSCompanyWebsite	LS Company Website	URL
**LSCompanyProductsTechnologies	LS Company Products and Technologies	Text area

\*Mandatory field

\*\*Highly recommended field

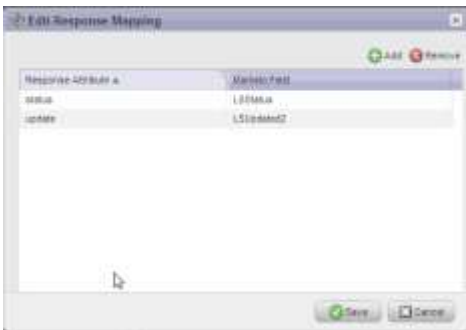
4. Once created, please send a report of your field layout and send it to [support@leadspace.com](mailto:support@leadspace.com).

## Installing Leadspace for Marketo

1. Create a Webhook for Leadspace, go to “Admin” -> “Integration” and click “Webhooks”.

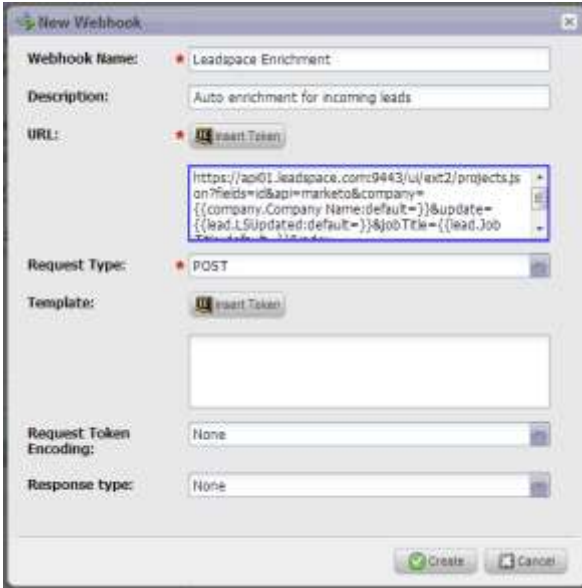


2. Fill in the Webhook name as “Leadspace Spotlight”, and add the “LSStatus” and “LSUpdated” fields to the response mapping, see below.



3. If you use the default Marketo fields for Company Name and Job Title, please insert the following URL to the URL textbox (as it appears in the screenshot below):  
`https://api01.leadspace.com:9443/ui/ext2/projects.json?fields=id&api=marketo&company={{company.Company Name:default=}}&update={{lead.LSUpdated:default=}}&jobTitle={{lead.Job Title:default=}}&index={{system.munchkinid}}_{{lead.id:default=}}`

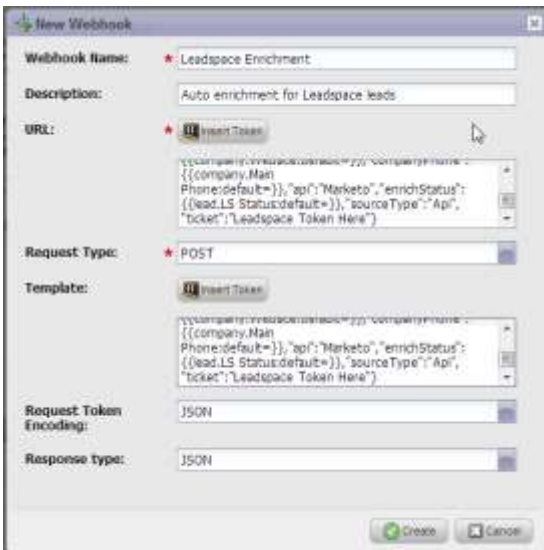
If you use custom fields for Company Name and/or Job Title please contact [support@leadspace.com](mailto:support@leadspace.com).



4. If you use default fields for First Name, Last Name, Email, Company Website and Company Phone, insert the following link to the “Template” field (be sure to insert the token Leadspace provided you in “Leadspace Token Here”).

```
data={"type":"Spotlighting","name":"Spotlight Marketo","externalId":{{lead.id:default}},"firstName":{{lead.First Name:default}},"lastName":{{lead.Last Name:default}},"email":{{lead.Email Address:default}},"companyWebsite":{{company.Website:default}},"companyPhone":{{company.Main Phone:default}},"api":"Marketo","enrichStatus":{{lead.LS Status:default}},"sourceType":"Api","ticket":"Leadspace Token Here"}
```

5. Set Request Token Encoding and Response Type to “JSON”.



# leadspace

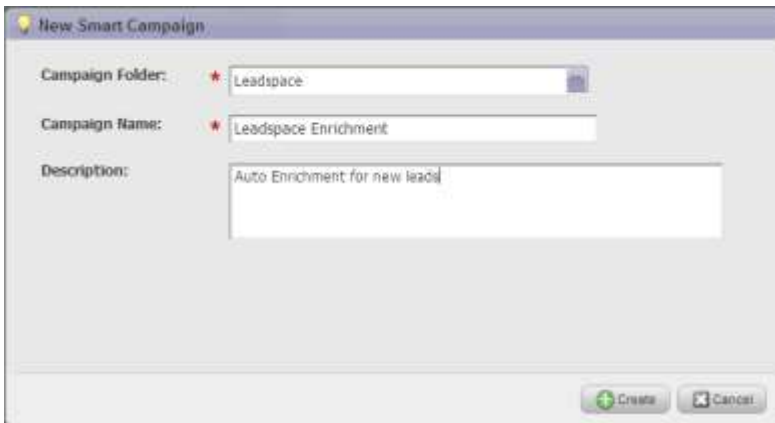
6. Click “Create”.

## Setting up a trigger for Leadspace enrichment

1. Create a new “Smart Campaign”.



2. Choose the folder and campaign name (example below).



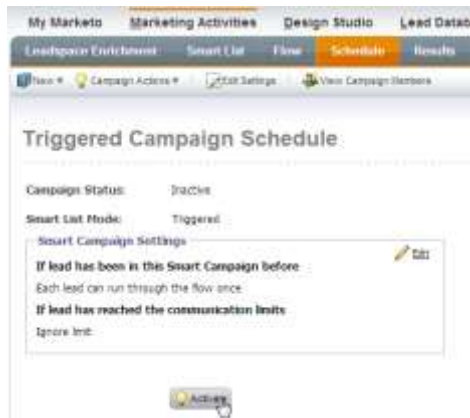
In order to enrich every new lead coming into the database with Leadspace data, drag the “Lead is Created” trigger onto the “Smart List” tab main screen.



- Next, drag the “Call Webhook” trigger onto the “Flow” tab main screen and choose the Leadspace webhook you created above, “Leadspace Enrichment”.



- Activate the campaign in the “Schedule” tab by clicking the “Activate” button.



- Once you have completed these steps, contact [support@leadspace.com](mailto:support@leadspace.com) to receive your Leadspace token.
- In addition to enriching new leads, we will be happy to help you trigger Leadspace for:
  - Incoming leads that are missing specific data fields (Email address, Title etc.)
  - Incoming leads that received a high behavioral score
  - Incoming leads from specific accounts (e.g. Fortune 100)
  - Incoming leads that inquired about a specific product line
  - And more...

If you wish to have a thorough discussion regarding additional triggers, please contact [support@leadspace.com](mailto:support@leadspace.com), and our integration experts will be happy to assist you.



## What's next?

After installing LeadSPACE for Marketo every new lead can now be verified, enriched, segmented and scored by LeadSPACE. This capability opens up new opportunities for you to optimize the way you manage your leads and your pipeline to supply your sales organization with accurate and highly targeted leads.