

Using Curata CCS with Marketo

Why use Curata CCS with Marketo?

If you are both a customer of Curata Content Curation Software (CCS) and Marketo, you can greatly benefit from using both systems together. Here's a list of reasons why you may choose to do so:

- **Reduced costs.** For high volume sends, rather than paying for both Curata's and Marketo's email delivery charges, you can instead deliver your emails solely through Marketo.
- **Complete Lead Activity Tracking.** Prior to this integration, it was only possible to track lead activities on your blog or site containing curated content, but not content that was sent through email newsletters. With the new integration, you can not only record how leads are consuming curated content on your site, but also via newsletters as well.
- **Enhanced Lead Scoring.** Because you can now track lead activities on emails as well, you can now assign lead scores associated with email activities. For example, you can increase a lead's score if they open your curated email newsletter every day.
- **Unified Lead Database.** Rather than managing two email subscription and out-out lists, across both Curata CCS and Marketo, you now will need to manage leads only in Marketo, and not worry about the hassles of list synchronization
- **More Engaging Lead Nurturing.** You can improve your prospect's engagement with lead nurturing campaigns by introducing curated content into your email content. Email newsletters with curated content tend to have higher open rates because the content is not egocentric and more informational in nature.

The rest of this guide will walk you through how to send curated content in Marketo emails, as well as track lead activity on a site with Marketo.

Binding your Marketo account

The first step is bind your Marketo account with Curata CCS. To do this, follow these steps:

1. Log in to Marketo with the account you want to bind to Curata CCS and go to the Admin page (top right of the screen).
2. In the left-hand column, select "Users & Roles". Click on the Roles tab and then select New Role.
3. For the New Role, give it a Role Name that you will easily be able to identify for the purpose of binding to Curata CCS. The description is optional. Under permissions, check the box for "Access API". Be sure that all sub-permissions under "Access API" are checked off (this should happen automatically). Click create.

Create New Role [X]

Role Name: * API Role

Description:

Permissions:

- Access Admin (0 of 25)
- Access API (17 of 17)
- Access Analytics (0 of 3)
- Access Calendar Presentations (0 of 2)
- Access Design Studio (0 of 31)
- Access Lead Database (0 of 15)
- Access Marketing Activities (0 of 14)
- Access SEO (0 of 3)
- Workspace Administration (0 of 2)

CANCEL CREATE

4. Click on the Users tab and then select Invite New User. Put in the information for whoever you want to add as the user. Then check the role that you just created in the previous step within the Roles section. After that, check the "API Only" box and click Invite.

Invite New User [X]

First Name: * []

Last Name: * []

Email Address: * []

Roles: *

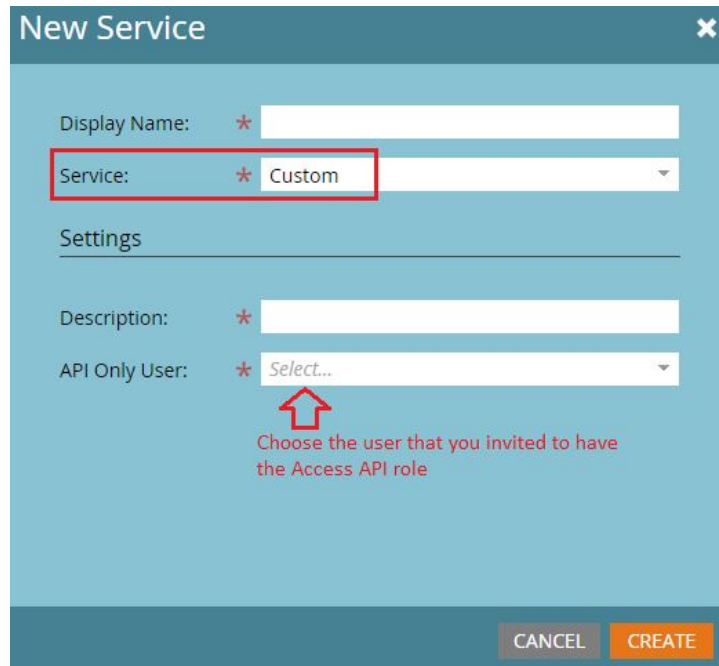
Select the Role that you created in the previous step here →

- Admin
- Analytics User
- API Role
- Marketing User
- Standard User
- Web Designer

API Only:

CANCEL INVITE

5. In the left-hand column click on "LaunchPoint". Then click New > New Service. Again, give this a Display Name that you will easily be able to identify for this purpose. Choose "Custom" in the Service drop-down list. Provide a relevant description and then choose the user you invited in the previous step from the API Only User drop-down. Click Create.



New Service [X]

Display Name: *

Service: * Custom

Settings

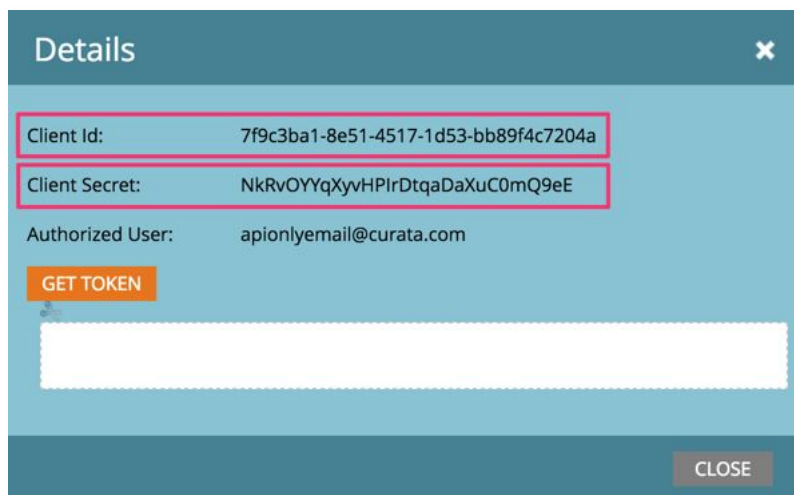
Description: *

API Only User: * Select...

Choose the user that you invited to have the Access API role

CANCEL CREATE

6. Click on "View Details" for the service you just created. You will need the Client ID and the Client Secret. Copy and paste them somewhere so that you can use them in a following step. (Hint: label each of these codes when you copy and paste them so you know which is which later.)



Details [X]

Client Id: 7f9c3ba1-8e51-4517-1d53-bb89f4c7204a

Client Secret: NkRvOYYqXyvHPIrDtqaDaXuC0mQ9eE

Authorized User: apionlyemail@curata.com

GET TOKEN

[Empty text area]

CLOSE

7. In the left-hand column click on "Web Services". In the "Rest API" section, copy and paste the "Endpoint" URL to the same place you pasted everything in the previous step.



8. Log in to your Curata CCS portal and go to Share > Newsletters > Settings. Scroll down to the Marketo Account Information section. You will see this:



Marketo Account Information

Marketo REST API Endpoint:

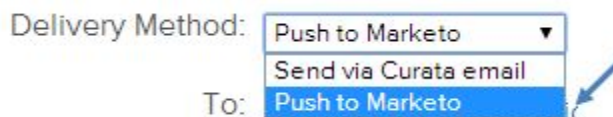
Marketo REST Client ID:

Marketo REST Client Secret:

Paste in the codes you copied from Marketo into their proper locations. Click save at the bottom of the page and you're done! You have now linked your Marketo account to Curata CCS.

Sending Newsletters from Curata CCS

Once you have authorized Curata CCS to access your Marketo account, sending newsletters is easy. In the Curata CCS newsletter settings, Select Push to Marketo under Delivery Method.



You will now see two additional fields appear called Marketo Template and Component Name. Here you can select which email template in Marketo you would like to use for the email you are about to create. Next you select which section or "Component" of the template you would like to insert the curated content into. For example, you may want to place your curated

content in the main section of the newsletter with a side column reserved for call-to-actions or vice versa.

Marketo Template:

Component Name:

Once you have selected the Marketo template and component name, you can now compose the email newsletter within Curata CCS as usual.

Style Settings

Under the styling settings for the newsletter, you will see options for the Newsletter Layout as well as the CSS Stylesheet (see below). Both of these settings will control the appearance of your curated content in Marketo.

Newsletter Layout

CSS Stylesheet :

However, it is important to remember that the layout and stylesheets selected here will only apply to the section of curated content that is inserted into a Marketo email. The styling and layout of the encompassing Marketo email template will dictate the overall appearance of the email.

Viewing Emails in Marketo

Emails pushed from Curata CCS appear in Marketo's Design Studio.

In the left column, your email will show up under Emails with under the name of the subject you specified in Curata CCS you entered followed by a date stamp.

You can then edit the email in Marketo, add it to a Program, specify the Smart List and schedule it for distribution as you normally would in Marketo.

