

## Marketo



<http://www.marketo.com/>

Gigya's integration with Marketo enables easy and efficient integration of Gigya's rich, permission-based social and other profile info with Marketo's marketing automation software.

After an initial configuration of your Marketo and Gigya accounts, it automates the transfer of user social data between Gigya and Marketo (transferring data in both directions) using APIs to control transmission and receipt of data. Bulk data transfers of the entire user list can be scheduled ad-hoc or done via automated daily updates (at preset times) that are used to transfer new and updated users. Updates are run as two separate jobs in which one updates from Gigya to Marketo and the other updates from Marketo to Gigya.

**Note:** Integration with Marketo is a premium service and can only be activated if your site package includes [Gigya's Identity Access and Storage](#) or [Registration-as-a-Service](#). For activation and more information, please contact your Gigya account manager or enter a [support request](#) on our site.

The integration with Marketo serves three main goals:

1. [Passing data](#) regarding new and updated accounts (leads) from Gigya's [Identity Storage](#) database to Marketo.
2. Sending data updates to Gigya - updating Gigya accounts on unsubscribed users and other profile changes.
3. [Syncing cookies between Gigya and Marketo](#) for associating anonymous leads (users who have not logged in), to registered users.

Integration is performed by transferring values from Gigya user account fields such as name, age, address or email to corresponding fields on the target system.

The integration supports native single value fields, such as name or email address, as well as complex custom fields such as Facebook 'likes' or 'favorites'.

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## Integration Requirements

The integration between Gigya and Marketo requires the following steps to set up:

- Configure Marketo to receive custom data fields from Gigya by [defining custom fields in Marketo](#).
- [Retrieve your user credentials](#) from the Marketo admin panel to provide to Gigya.

- Configure Gigya to receive custom data fields from Marketo by [defining custom fields in Gigya](#).
- Send your Implementation Manager the [data required for the Gigya configuration](#), to be implemented on your behalf.
- [Implement Marketo's lead tracking](#) (Munchkin) code to your HTML for cookie syncing and lead tracking.

## Testing Results

Your customer support team can run tests to ensure data integration was successful from Gigya into Marketo and vice versa.

To test that the munchkin integration is correct and [lead tracking](#) is configured correctly, please contact your Marketo support team.

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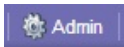
## Marketo Configuration

### Defining Custom Fields in Marketo

Throughout the configuration of your Marketo account to integrate data with Gigya, you will have to define a few custom fields for Marketo to hold custom data obtained from Gigya.

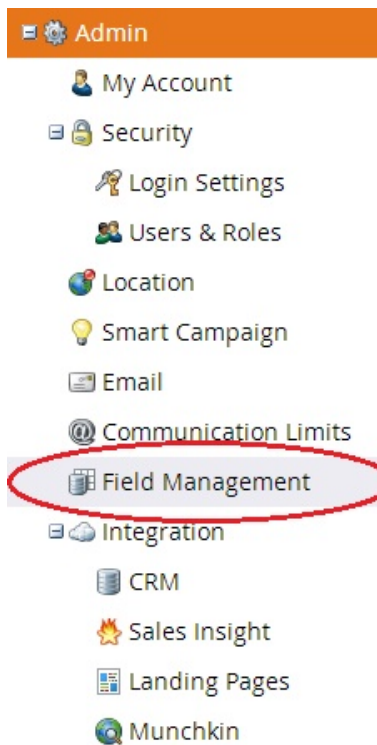
This section describes generically how to add custom fields to the 'Lead database' in Marketo.

1. Go to the admin panel by clicking on

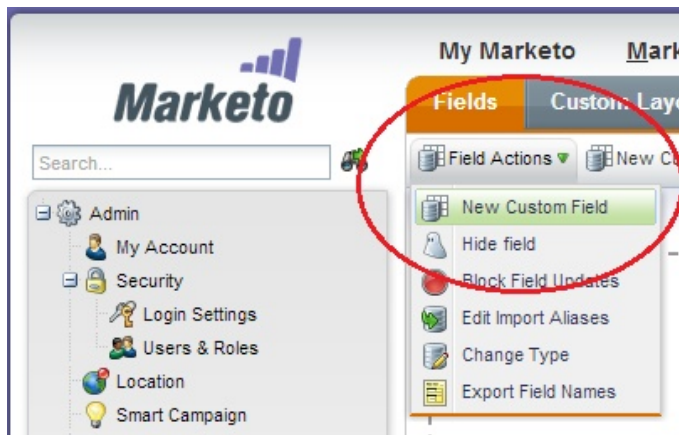


on the top right navigation bar.

2. Select 'Field Management' from the list:

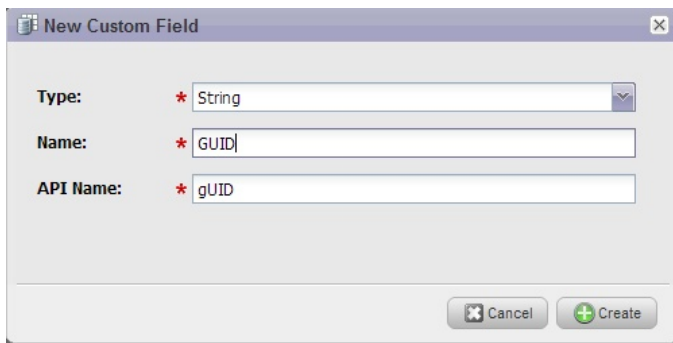


3. From the 'Field Actions' menu select 'New Custom Field':



4. A new custom field dialog will open, with the fields: 'Type', 'Name' and 'API name'.

- For 'Type' select the type of field that you wish to create.
- Under the Name enter the name of your new field. You will notice that when you type in the name, the API Name field will be filled automatically with the name of the field. You can change it or leave it as is, just note that this is the reference to the field when performing data updates (the API Name should be used when mapping fields between Gigya and Marketo).



Click 'Create' and you're done. The new field is now a part of the lead info in Marketo.

## Adding a Gigya User ID to the Leads Info Fields

First you should add a field for the Gigya ID to the lead info database in your Marketo account.

Transfers of data from Marketo to Gigya are faster and more effective if Marketo contacts also hold their Gigya user ID.

To do so, follow the simple steps described in the ['Defining custom fields'](#) section:

- For 'Type' select - "String".
- Under Name - "GUID"

Click 'Create' and you're done. The GUID field is now a part of the lead info in Marketo.

In the 'Field mapping' section, make sure to map the API name to the corresponding Gigya field ( i.e GUID = UID ).

## Defining Custom Fields for Storing Facebook Likes and Favorites

In order to integrate social data on user likes and favorites from Gigya to Marketo, you need to define these as 'Custom fields' in Marketo.

Follow the steps described in the ['Defining custom fields'](#) section:

- Under 'Type' select - "Text area".
- Under Name enter- "Likes". You can name the field however you like, although it is recommended to select a name that describes the value of the field, for example: "Likes" or "fbLikes" for likes.

Click 'Create' to add the field to the lead info database in Marketo.

In the 'Field mapping' section, make sure to map the API name of the newly created field to the corresponding Gigya field ( i.e Likes = profile.likes ).

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## Data Required for Gigya Configuration

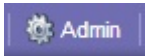
The data integration happens automatically, once set up, at predefined times. To configure the integration, you will need to provide your Gigya implementation manager with the following information:

Required	Name	Type	Description
Required	marketoUserId	string	User ID in Marketo.
	marketoSecretKey	string	User account secret key from Marketo.
	soapUrl	string	The personal API URL associated with the user, obtained from the Marketo admin control panel.
	esp.update.hour	numeric	The time of day that the outbound synchronization will run (i.e Data updates form Gigya to Marketo).
	esp.sync.unsubscribed.hour	numeric	The time of day to retrieve inbound updates from Marketo (e.g updates on unsubscribed users).
	[fieldMapping]	string set	<p>Set of Marketo 'source' fields and Gigya 'target' fields in "key=value" format.            For names of Marketo fields for mapping see the <a href="#">Marketo field mapping</a> section.            Note: The GUID field created <a href="#">as described</a> and Email are required in the field mapping.</p> <p>For example:</p> <pre> gUID=UID Email=profile.email First Name=profile.firstName Last Name=profile.lastName Gender=profile.gender Country=profile.country city=profile.city birthDay=profile.birthDay birthMonth=profile.birthMonth birthYear=profile.birthYear           </pre> <p>Where gUID is the Marketo fiels that holds the user's Gigya user ID, and UID is the name of the user's ID at Gigya.</p> <p>Note that each output field must map to a single field in the destination partner's platform.</p>
Optional	ae.filterClause	string	An SQL-like query specifying the data to retrieve from Gigya on outbound data transfers. Please refer to the filter criteria in the <a href="#">Identity Query Tool</a> .

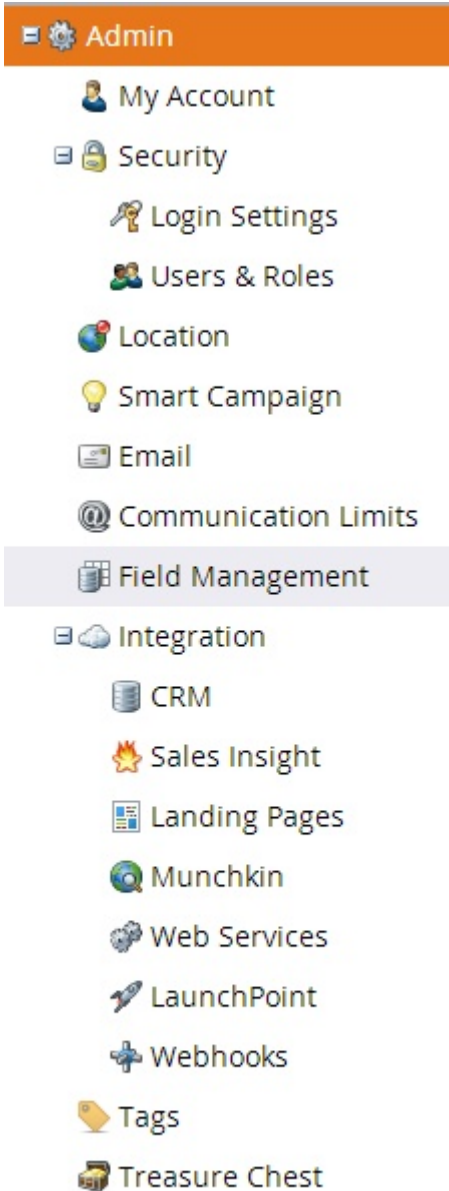
## Marketo Field Mapping Names

To get a list of Marketo API names for field mapping, follow these steps:

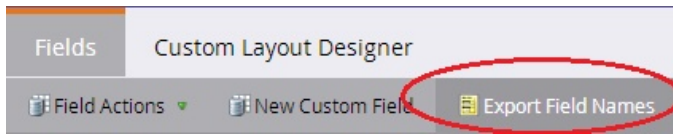
- Go to the 'Admin' section in your Marketo account by clicking on



- Click on 'Field Management'



- Click on 'Export field names' from the action panel at the top of the screen:



- The field names will be exported as an Excel sheet to your hard drive. Gigy supports fields and field names from the 'SOAP API Name' column.

Note: Users who use Marketo's 'Social fields' can also populate them via field mapping

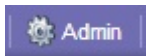


## Marketo User Credentials

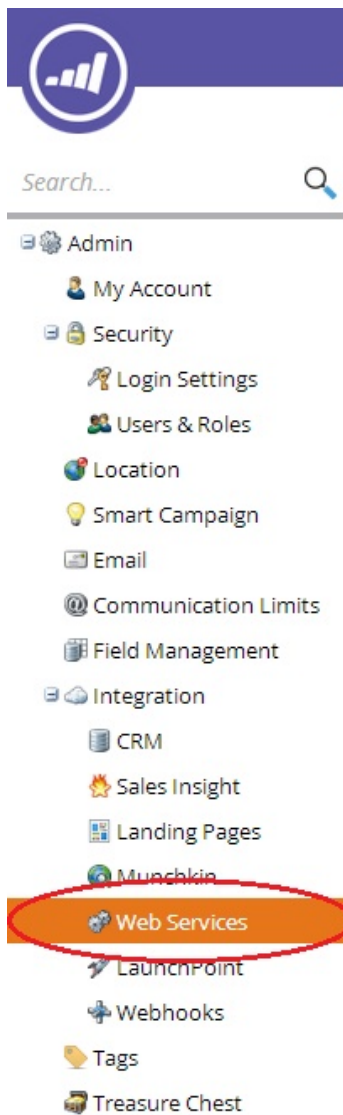
The Marketo configuration with Gigy requires your unique Marketo web services credentials. That is, Marketo issues an API endpoint for each user to send requests to along with a user ID and a secret key.

These credentials can be obtained by:

1. Accessing the 'Admin' panel on your Marketo account by clicking



2. Click the 'Web Services' Link on the right side panel.



3. In the 'soap API' box you will find your user credentials for the Marketo Gigya configuration:

- User ID - the field to be set as the 'marketoUserId' field.
- Encryption key - should be used for the 'marketoSecretKey' field.
- Endpoint - the URL for the 'soap URL' field.



API Call Information	
Daily Request Limit:	10000
Requests in the Last 7 Days:	0
SOAP API	
Endpoint:	<input type="text" value="http://api.gigya.com/v1"/>
Access Status:	Active
Status Reason:	
User ID:	<input type="text" value="gidpnd_1_12400000000000000000000"/>
Encryption Key:	<input type="text" value="12345678901234567890123456789012"/>
SOAP API documentation:	<a href="http://developers.marketo.com/documentation/soap">http://developers.marketo.com/documentation/soap</a>
<input type="button" value="SAVE CHANGES"/>	

## Gigya Configuration for Inbound Transfers

As Gigya does not support all of Marketo's data fields natively, you need to define certain custom fields in Gigya's data store in order to perform inbound data transfers (sending data updates from Marketo to Gigya).

Adding custom fields can be done in different ways:

- By calling one of the API methods [ids.setSchema](#) or [accounts.setSchema](#)
- Through the RaaS [Screen-sets](#)

You are required to create an 'Unsubscribed' field to hold boolean values on users who are unsubscribed from Marketo. Contact your implementation manager to assist you in creating custom fields in Gigya.

Once you have created the custom field in Gigya's identity storage, add this field to the field mapping in the same manner as the outbound field mapping, i.e `Marketo_field_name = Gigya_field_name`.

To get the list of Marketo field names for the field mapping see instructions on getting [Marketo field mapping names](#).

## Cookie Syncing and Lead Tracking

To implement cookie syncing between Gigya and Marketo on your website, you must add Marketo's lead tracking (Munchkin) code to your HTML.

First you need to add the following line to the `<head>` of your HTML page:

```
<script src="http://munchkin.marketo.net/munchkin.js" type="text/javascript"></script>

<script>
  Munchkin.init("<Your Munchkin account ID>");
</script>
```

Use the 'associate lead' call to sync information on a previously anonymous lead with a known lead as the user logs in to your website, or create a new lead when a user signs in.

The code should be placed within your 'onLogin' [event handler](#) implementation.

Note that you must call the Munchkin tracking function `Munchkin.init()` before making any `Munchkin.munchkinFunction()` calls (as seen above).

```
gigya.socialize.addEventHandlers({
  onLogin: onLoginHandler  });

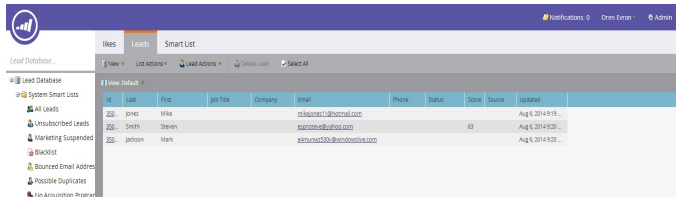
// onLogin Event handler
function onLoginHandler(eventObj) {

//calling the associate lead function
Munchkin.munchkinFunction(
  'associateLead',
  {
    //Email is required to associate lead. You may pair any field in Marketo lead fields
    Email: eventObj.user.email,
  },
  //read about hashed secret key on Marketo's lead tracking page (link below)
  "myHashedSecretKey"
);
}
```

For more information on how to sync cookies visit [Marketo's documentation on Lead tracking](#).

## Using The Integration

### Data as it will Appear on Marketo

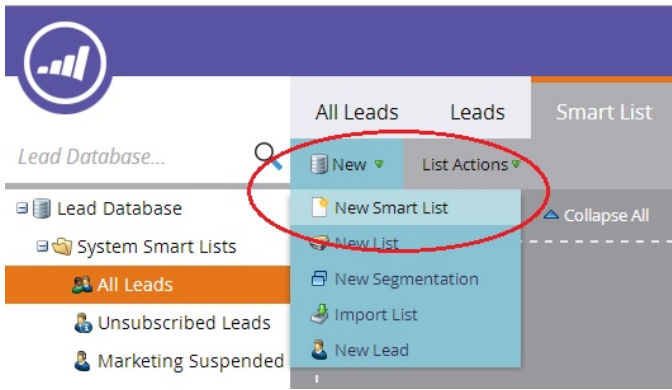


Last Name	First Name	Job Title	Company	Email	Phone	Status	Score	Source	Updated
200	Steve	Mike		mike@acme.com					Aug 6, 2014 11:11
200	Smith	Steven		steven@acme.com		63			Aug 6, 2014 9:25
200	Jacobs	Mark		mark@acme.com					Aug 6, 2014 9:25

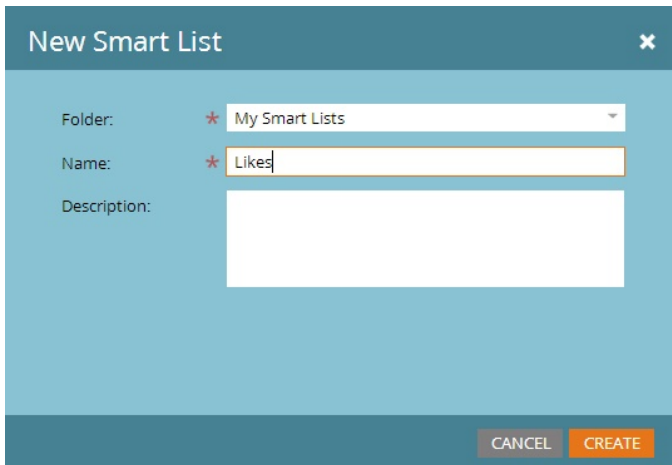
### Filtering Based on Likes and Favorites

Marketo will hold the 'Likes' and 'Favorites' data, once integrated, as a flattened JSON object. To filter data based on the custom social data from Gigya, you will need to create a new 'Smart list':

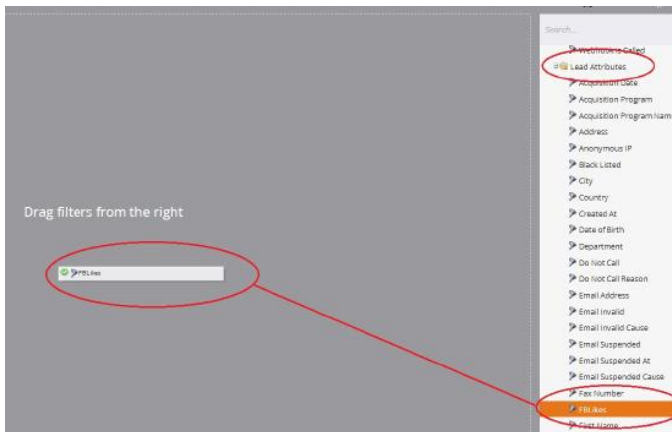
1. From the 'Lead database' section select 'Smart list' >> 'New' >> 'New smart List':



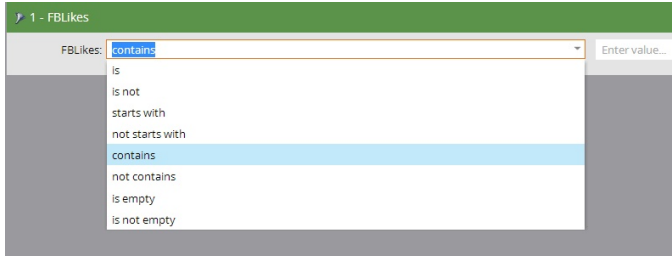
2. A 'New smart list' dialog will open up with the fields 'Folder', 'Name' and 'Description'. Select the folder in which you wish to place the list, and type a name for the list. It is recommended to select a meaningful name, for example - if you are filtering based on "likes" data, you can call the list "likes". Once you are done filling in the list parameters, click 'Create' to create the list:



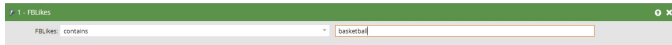
3. Next we want to add a filter to the list. From the right-side menu, select the 'Lead attributes' folder. Select the field you want to use as a filter and drag it to the list body:



4. Select 'Contains' from the drop-down menu on the left side of the filter box:



5. To complete the filter, enter the value you want to filter by in the right-side text box. For example, if you want to filter leads who like basketball, enter the keyword 'basketball'.



6. Click the 'Leads' tab to view the filtered values.

