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Marketo Integration 9.0

Marketo can be integrated into elcomCMS to help automate your marketing activities.

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Marketo, is a marketing automation provider that can be integrated with elcomCMS. There are two main activities that can be accomplished with Marketo integration:

1. User signup - New member details can be passed through to Marketo. From there Marketo may pass these details onto your Customer Relationship Management (CRM) system, or perhaps kick off a marketing automation workflow ('Campaign'). Details may come from elcomCMS registration forms or OAuth providers authentication. Note: Active Directory synchronisation will not be passed to Marketo.
2. User actions - Track a user as they interact with your website, building up a profile for them within Marketo. Some javascript and Marketo code, usually placed within the footer of your site's articles, places a cookie on the user's machine and updates Marketo with each page the user visits. The Marketo code ensures the tracking information is send back to your Marketo account. This code is provided within your account setup information. This information can be used to place the user into segments.

For more information about Marketo and setting up and using Marketo codes, see the Marketo Resources site - <http://au.marketo.com/resources/>

Pre-requisites

- An active account with Marketo with full access permissions enabled.
- To access the Marketing Suite > Marketing Automation Providers, full Access must first be configured within Security > Permissions > Functions tab. Select the appropriate Group, then select Marketing Suite from the Select Function Group drop down. Grant Full Access in order to set up the Marketing Automation Provider.

Setting up Marketo

There are two steps to setting up Marketo.

1. **Add Marketo** as a Marketing Automation Provider, from information found within Marketo.
2. **Sync the user groups and types of users** that you want updated from elcomCMS to Marketo.

To add Marketo as a Marketing Automation Provider

1. In elcomCMS: Go to the Admin dashboard and select **Marketing Suite > Marketing Automation Providers**.
 - > If Marketo has already been set up, it will be displayed in the list.
2. Click on **Add New** to add a new provider.
 - > The **Add/Edit Marketing Automation Provider** page is displayed.
3. Add the details. Note: All fields are mandatory.

The screenshot shows the 'Add/Edit Marketing Automation Providers' form. The title is 'Add/Edit Marketing Automation Providers' in blue. In the top right corner, there are two buttons: 'Back' (white with blue border) and 'Save' (blue with white text). The form contains the following fields:

- Automation Provider***: A dropdown menu with 'Marketo' selected.
- User ID***: A text input field containing a long alphanumeric string.
- Encryption Key***: A text input field containing a long alphanumeric string.
- SOAP Endpoint***: A text input field containing a URL: 'http://000-000-000.marketo.com/soap/HRMWS_2_1'.
- Munchkin Account ID***: A text input field containing '000-000-000'.
- Munchkin API Key***: A text input field containing '000-000'.

4. **In Marketo:** Log in to Marketo using a separate browser tab or window.
 - > You will need to copy the information from Marketo to elcomCMS, so having a separate tab or window open is useful to do this.
5. Go to **Admin > SOAP API**
 - > The User ID, Encryption Key and SOAP Endpoint are all located here.
6. Go to **Admin > Munchkin** to find the Munchkin Account ID and API Key.
 - > The **Munchkin Account ID** is located at the top of the page. This will be the code to be used to track users on your site.
 - > The **Munchkin API Key** is also located on this page.
7. In elcomCMS: Enter all the Marketing Automation Providers information
8. Click Save.

Sync User Groups and User Type

1. From the Marketing Automation Providers page (Admin dashboard > Marketing Suite > Marketing Automation Providers), select **User Sync**.
 - > The **Add/Edit Marketing Automation Groups** page is displayed.
2. Tick to select the **User Groups** that will be updated in Marketo.
 - > All the User Groups selected will be sync'd to Marketo.
3. Tick to select the **User Types** that will be updated in Marketo.
 - > All the User Types selected will be sync'd to Marketo.
4. Click on the **Save** button when the configuration is complete.

Add/Edit Marketing Automation Groups

Automation Provider* ▼

User Group*

| | | |
|---|--|-------------------------------------|
| <input type="checkbox"/> Administrators | <input type="checkbox"/> All Technical Staff.Distribution Groups.ElcomGroups.elcom.com.au (1) | <input type="checkbox"/> Publishers |
| <input type="checkbox"/> All Elcom India.Distribution Groups.ElcomGroups.elcom.com.au (1) | <input type="checkbox"/> Members | <input type="checkbox"/> System |
| <input type="checkbox"/> All Elcom Sydney.Distribution Groups.ElcomGroups.elcom.com.au (1) | | |

User Type

| | | |
|--|--|--|
| <input type="checkbox"/> Administrator | <input type="checkbox"/> Elcom Support | <input type="checkbox"/> Extranet User |
| <input type="checkbox"/> Publisher | <input type="checkbox"/> Member | |