

## MarcomCentral-Marketo Connector Overview

Marketo's marketing automation software integrates with MarcomCentral portals, allowing users to access and customize corporate email marketing campaigns while pushing data directly back to Marketo.

### MarcomCentral Account Set Up

Complete the following steps for setting-up the integration.

#### Account Add-On

Marketo integration is an **Account Add-On** in MarcomCentral. The **Account Add-On** is set-up by the business relationship manager (BRM).

The BRM needs to login with their Admin Account settings and check on the option **Enable Email Integration with Marketo**.

Go to **Account Settings** | click **Account Add-ons** | check on **Enable Email Integration with Marketo** | Save.



#### List Management

The Marketo **List Management** must be configured to work with the Portal instance. **List Management** is visible to PTI Super Admin Users and Admin Tool Users.

Go to **Account Settings** | click **List Management** | click the **Marketo** link | fill in the **Marketo Account Details** page with required Marketo account information | Save. The information is associated with your Marketo account.

Needed information includes:

- Marketo Account Number/User ID
- Marketo Encryption Key
- Marketo SOAP API Endpoint
- REST API Endpoint
- REST API Identity

To get this information **Marketo Web Services SOAP API** needs to be activated. This is your (the customer) responsibility to acquire. Refer to the Marketo article

<https://community.marketo.com/MarketoArticle?id=kA050000000KyoyCAC> for more information.

## Marketo Account Details

Save
Cancel

Portal Training DharmaTravel

Marketo Account Number/ User ID \*

Marketo Encryption Key \*

Marketo SOAP API Endpoint \*

REST API Endpoint \*

REST API Identity \*

Active

Do make sure the Portal is correctly configured. Currently the Marketo configuration will show **Incorrectly Configured** even when it is configured correctly.

**Note: This is a known issue and will be fixed shortly.**

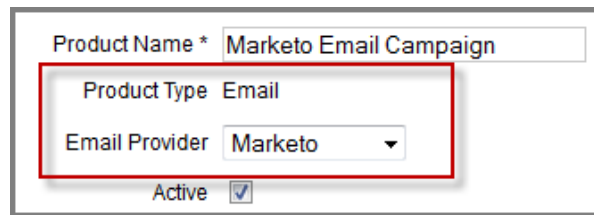
EmailCampaignPortal_19395	<b>Incorrectly Configured</b>	Yes
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## Email Product Set Up

### Create the Product

The Marketo email campaign needs to be created and configured as a Product in MarcomCentral. The **Product Type** to use is **Email** followed by selecting the **Email Provider Marketo**. Add the Product Information, Portal View, Pricing, etc.

**Note: If you only have 1 email provider Add-On activated you won't see the Email Provider drop- down at the Product level.**



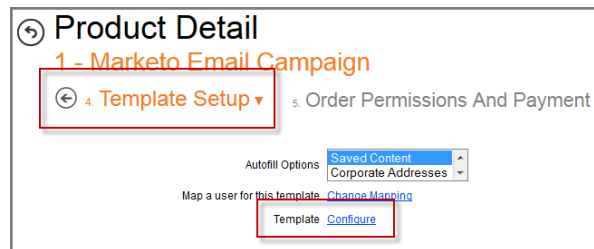
Product Name \*

Product Type

Email Provider

Active

When ready click Step 4 (**Template Setup**) and click the **Configure** link.



Product Detail

1 - Marketo Email Campaign

4. Template Setup

5. Order Permissions And Payment

Autofill Options

Map a user for this template [Change Mapping](#)

Template [Configure](#)

## Template Set Up

### Load Email Tab

The **Marketo Campaign Parameter Values** need to be entered manually. Information needed includes:

- Campaign Name
- Program Name
- List Name
- Send From Email Token
- Send From Name Token

1. Enter YOUR Campaign Parameters from Marketo. The information needs to *match exactly how it reads in Marketo*.

Marketo® Campaign Parameter	Value
Campaign Name	CampaignName
Program Name	ProgramName
List Name	ListName
Send From Email Token	my.Send From Email
Send From Name Token	my.Send From Name

Select	Marketo® Token
<input type="checkbox"/>	Anonymous IP
<input type="checkbox"/>	Black Listed
<input type="checkbox"/>	Created At
<input type="checkbox"/>	Date of Birth
<input type="checkbox"/>	Do Not Call
<input type="checkbox"/>	Do Not Call Reason
<input type="checkbox"/>	Email Invalid
<input type="checkbox"/>	Email Invalid Cause
<input type="checkbox"/>	Fax Number
<input checked="" type="checkbox"/>	First Name
<input type="checkbox"/>	Full Name

**Note: Send From Email Token and Send From Name Token:**

- The Send From Email Token and Send From Name Token parameters will always have a default token value of:
  - my.Send From Email (shown above).
  - my.Send From Name (shown above).
- These default tokens must exist in your Marketo instance to work.
  - The tokens may need to be added to your Marketo.
- Different token values can be used.
  - If using different token values, these *must* be added to the MarcomCentral server. Contact your BRM for more information.
  - The new tokens must exist in MarcomCentral and in Marketo and names must match exactly.

Next, check on the **Marketo Tokens** needed for the email campaign | click **Load** at the bottom of the page.

- Marketo uses Tokens, which are similar to customized variable attributes used with MarcomCentral templates. Tokens should be unique for the email campaign.
- **First Name, Last Name and Email Address** are required Tokens. These Tokens cannot be unchecked.
- The Marketo Tokens will be added to the **Form Display** tab. These are the variables for the email.

## Form Display Tab

All Tokens selected from the **Load Email** tab will display here. First, make sure to mark the **Email Address** field in the **Email** column.

Type	Field	Field Type	Form Prompt	Sort Order	Active	Required	Hidden	VDP	Email
T	First Name	Text Field - Single Line	First Name	10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
T	Last Name	Text Field - Single Line	Last Name	20	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
T	my.Advisor First Name	Text Profile Attribute - Single Line	Advisor First Name	30	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
T	my.Advisor Last Name	Text Profile Attribute - Single Line	Advisor Last Name	40	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
T	my.Advisor Phone	Text Profile Attribute - Single Line	Advisor Phone	50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
T	<b>Email Address</b>	Text Field - Single Line	Email Address	60	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>

Required Token fields will be grayed out as **Active** and **Required**. Any of the other fields can also be made required.

Type	Field	Field Type	Form Prompt	Sort Order	Active	Required	Hidden	VDP	Email
T	<b>First Name</b>	Text Field - Single Line	First Name	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
T	<b>Job Title</b>	Text Field - Single Line	Job Title	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
T	<b>Last Name</b>	Text Field - Single Line	Last Name	30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
T	<b>City</b>	Text Field - Single Line	City	40	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
T	<b>State</b>	Text Field - Single Line	State	50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="radio"/>
T	<b>Email Address</b>	Text Field - Single Line	Email Address	60	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>

Make sure to update or verify the following:

- Token fields must be marked as **VDP**.
- The **Email Address** Token needs to be identified in the **Email** column.
- Rename any Field Prompts.
- Field Types need to be all **Text Field – Single Line**.
- Click a Field name link to set the optional **Maximum Character Length, Generate SKU,** and thumbnail option.

**Configure Vdp Field [First Name]**

Setting	Value
Maximum Character Length	<input type="text"/>
Generate SKU If a VDP field is set to generate the SKU or SKU description, the entry from the first row of the list will be used.	Use for SKU <input type="button" value="v"/>
Form Prompt Thumbnail	<input type="button" value="Gallery..."/>

## Data Options Tab

Choose at least one **Available Data Source Option**. This includes **Enter Individual Information** and any other data source options.

Load Email	Form Display	<b>Data Options</b>	Field Options	UI Rules	History
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**Available Data Source Options**

- Enter Individual Information
- Existing File Menu
- New Comma Delimited File Upload
- New Excel File Upload

**Allowed File Extensions**

NOTE: Enter extensions as comma separated list (csv,txt,xls).  
Leave blank to allow all file extensions.

## Publish the Marketo Email

Make sure to **Publish** the Marketo email campaign and add the Product to the **Catalog Editor**. The Product needs to be **Activated** and **Published**. It will not be seen in the Portal until this is done.

### Catalog Editor

Last Published Date: 1/29/2015 5:45:52 PM

- Remove
- Featured Products
- Navigation Bar
- Catalog
- Marketo Email Campaign

## How to Order an Email Campaign from the Portal

The ordering process needs to be tested with the Portal. When ordering the campaign from the Portal a **data list** or an **individual record** can be used. Keep in mind the following workflow.

### Specify and Map the Data Source

Depending what was checked on when creating the email in the Admin Tool you first need to specify the data source option of a data list or individual record and then click Continue.

### Enter Individual Information

This process is straight forward. If the option selected is **Enter Individual Information** there is no need to upload a data file. Click Continue.

The next step is to version the Product for one record. As additional text fields can be added to the Form Display, usually there will be no need for additional versioning.

Make sure to fill-in all required fields or the Product cannot be processed. Click Continue.

### Upload a Data File

The other option is to upload a data file. Choose the data source file type | upload the file | click Continue to map the fields.

### Map the Data Fields (Data File Only)

If uploading a data file then the **Data File Fields** need to be mapped to the **Template Fields**.

If there are **Data File Fields** that do not need to be mapped to any of the **Template Fields** it is okay to leave them unmapped or set the drop-down fields to empty. **Data File Fields** can be mapped to multiple **Template Fields**. Do make sure to check accuracy before continuing on.

**Map Data**  
*Map your data file fields to the template fields by changing the drop-down menus below.*

Template Fields	Data File Fields	Sample Data
First Name* ➔	First Name ▼	Jennifer
Job Title ➔	Job Title ▼	CEO
Last Name* ➔	Last Name ▼	Watson
City ➔	City ▼	San Diego
State ➔	State ▼	CA
Email Address* ➔	Email Address ▼	jwatson@xyz.com
	Company Name ▼	XYZ Company
	▼	
	▼	

If the wrong data file type (txt, csv, etc.) was uploaded the **Sample Data** fields would show a string of data. Click the **Back** button to re-upload the file.

Once done mapping click Continue to prepare to send a proof.

## Version the Form, Proof, and Send Options

### Proof the Email

The **Email proof to** will default to the Portal Users email. The email can be changed.

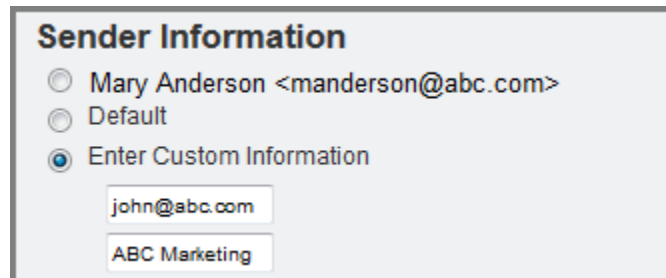
Mentioned earlier, if the **Enter Individual Information** was selected you need to fill in the required Form fields before sending the proof.

### Sending Options

#### *Sender Information*

The **Sender Information** will show the recipients of the Marketo email of who it is from. By default the **Portal User's** name and email are selected. Other options are:

- **Default** shows the recipients a system default email and display name.
- **Enter Custom Information** gives the option to enter an alternate **Email** and **Display Name** to the recipients.

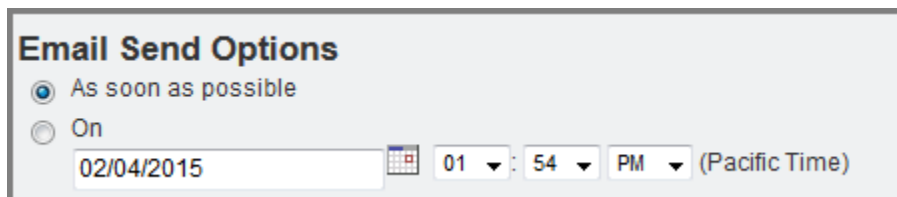


The screenshot shows a form titled "Sender Information" with three radio button options: "Mary Anderson <manderson@abc.com>", "Default", and "Enter Custom Information". The "Enter Custom Information" option is selected. Below the radio buttons are two input fields: one containing "john@abc.com" and another containing "ABC Marketing".

#### *Email Send Options*

The two options are **As soon as possible** or **On** a specific date and time.

- **As soon as possible** – Once the Proof has been reviewed .....
- **On** – The ability to create a customized date and time to send the email once it has been Proofed.



The screenshot shows a form titled "Email Send Options" with two radio button options: "As soon as possible" (selected) and "On". Below the "On" option is a date and time selection interface. It includes a date input field with "02/04/2015", a calendar icon, a time input field with "01", a colon separator, a minute input field with "54", a dropdown menu with "PM", and the text "(Pacific Time)".



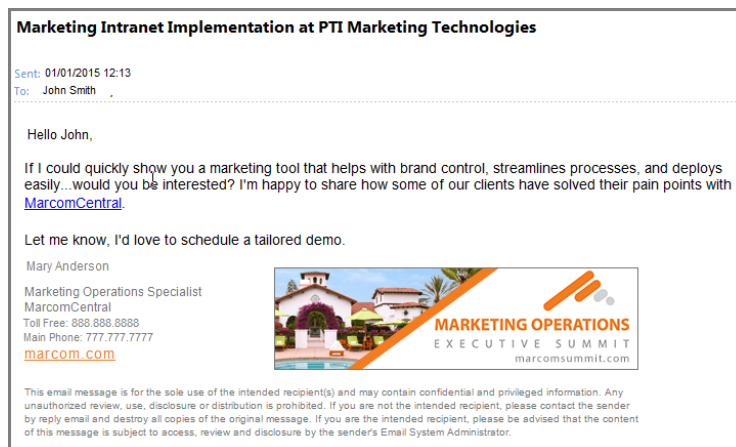
### Add to Cart

Add the email campaign to the shopping cart. Once added to the shopping cart the system will generate a proof and send it to the email provided. Go to your email and proof the email campaign.

**The proof may take 5 minutes or more to arrive in your email box.**

### Example of Email Campaign

This is an example of what an email campaign could look like.



### Checkout

After the Email campaign has been proofed return to the shopping cart and click Checkout to complete the order. There is nothing indicating the proof has been reviewed. Keep in mind the following:

- The Portal User is still able to checkout without viewing. The Portal User is responsible for what is being sent.
- The Marketo Email campaign will not be sent to recipients until the Job Ticket has been created in Distribution.
- An Auto Job Ticket can be created to automate the process upon completing check out.

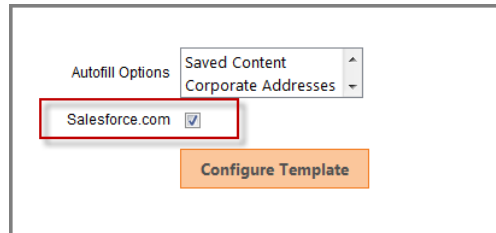
## Salesforce Integration Supported with Marketo

The Salesforce integration is supported with Marketo and MarcomCentral. Salesforce Contact, Lead, or Account information can be passed to the Portal and used with a Marketo template.

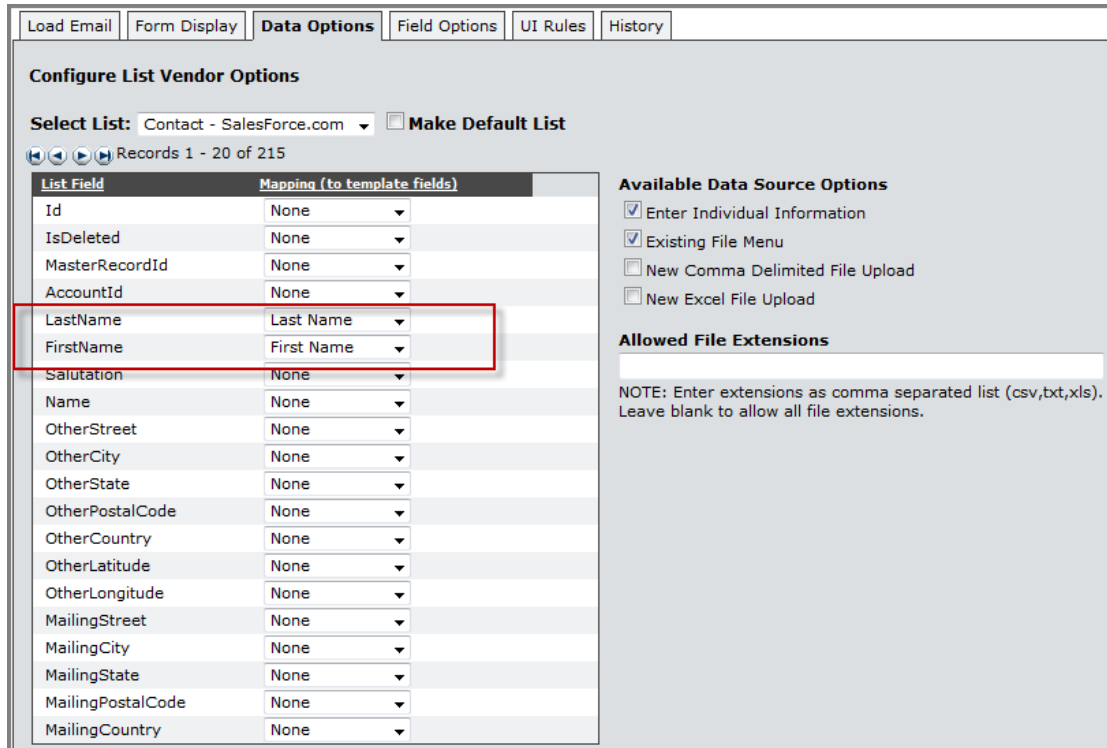
There are several configurations that need to be activated to use the integration feature. Ask your business relationship manager (BRM) for more information about setting up the Salesforce integration with Marketo.

### MarcomCentral Setup

Once the Salesforce integration is set-up, check on the new Salesforce.com option at the Product | Template Setup. This will allow the Product to be mapped with Salesforce data.



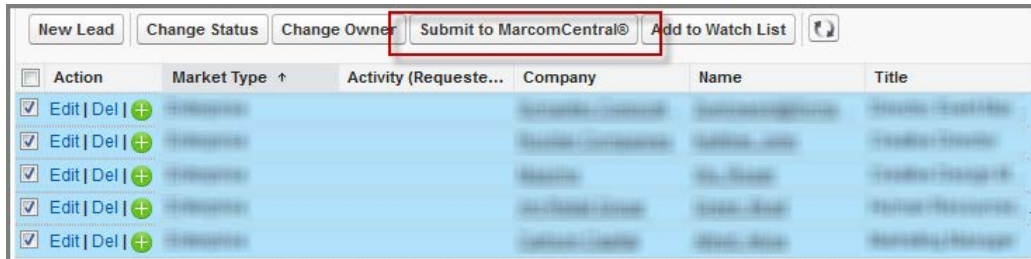
Next, the template fields (Marketo Tokens) need to be mapped to the Salesforce list fields. This can be done with Accounts, Leads, or Contacts.



Apply changes and Publish the template.

## Portal User Experience

There is a Submit to MarcomCentral button added to the Contact, Leads, and/or Account pages in Salesforce (done through Salesforce integration set-up). After the Salesforce User completes a search and selects several records of data, the User clicks the **Submit to MarcomCentral** button.



- The records will pass into the MarcomCentral Portal. The User will also be logged in to the Portal through a single-sign-on process.
- Once in the Portal, locate the Marketo email campaign, and order it. The number of records passed from Salesforce will show in the first step.
- Click the Send the Proof button. The Proof will generate and be sent to the designated Portal User for review. Once sent and received the User can order the campaign.
- MarcomCentral will create an **Activity**, in Salesforce, for the Contact(s), Lead(s), or Account(s) used.

## Known Issues

- When configuring the Marketo instance with MarcomCentral the connection will show **Incorrectly Configured** even when it is configured correctly. Do make sure to test the connection before making the email available in the Portal for purchase.
- When sending two of the same email campaigns with the same tokens and same subscribers being sent at different times will cause the matching instances to be overwritten by the first campaign sent. For example:
  - ❖ User 1 orders a Marketo email campaign in MarcomCentral, customizing a field with specific information and it is set to go out in an hour.
  - ❖ A few hours later User 2 orders the same Marketo email campaign in MarcomCentral using the same list of emails, but customizes it with different information and sets it to go out immediately.
  - ❖ The final results will be User 2s information will override User 1s campaign.
- When on step 3 of the ordering process there may be no need for Versioned information. The text is in red, which typically indicates something is wrong. This will be updated.
- The option to Map a user for this template states “This will be used as a “test” user for previewing Personalization data such as Profile Attributes and Intelligent Forms” does not provide a Preview option before publishing the campaign. It maps a user, but nothing provides the options to test. This should read “Will only work for previewing PA and iForms...”
- On the Version This Product page under the word Form, statement reads “Complete the form below and preview your results to the right.” There is nothing to proof as the proof is sent by email. This statement needs to be removed.
- On the Proof page, in the Portal, the statement reads “Specify which records in the data source to review”. It should be single “....which record....” as one record can only be reviewed.