# VERTIFY

# Marketo Setup Guide

This document outlines the required initial setup steps in the external system for the Vertify integration.

# OVERVIEW

# STEP 1: CUSTOM FIELD CREATION

Custom fields are required to be created on the Person Object (LeadRecord) in Marketo for the Vertify integration.

Reference the API Name column in the table below for the list of how to title the fields, the needed data type, and the purpose of the field for context.

| API Name | Data Type | Purpose |
|---|---|---|
| CRMContactInternalId | String | This field will be used on the LeadRecord in Marketo to house the CRM Contact's internalId, and for merging and lookup purposes in Vertify. |
| CRMCompanyInternalId | String | This field will be used on the LeadRecord in Marketo to house the CRM Company's internalId, and for merging and lookup purposes in Vertify. |
| CRMLeadInternalId | String | This field will be used on the LeadRecord in Marketo to house the CRM Lead's internalId, and for merging and lookup purposes in Vertify (*if applicable). |
| CRMRecordType | String | This field will be used on the LeadRecord in Marketo to house the static value hard-coded by Vertify. It is used to denote the type of record currently in sync with the CRM, and for filtering in Vertify. |
| SyncToCRM | Boolean | This field will be used on the LeadRecord in Marketo and is hard-coded by Vertify or by the Send to CRM Smart Campaign. It is used to determine which records are eligible to move back to the CRM, and for filtering in Vertify. |

*Please note: the fields listed below are only applicable if interesting moments are included with your Marketo package; if not, please disregard.

| MKInterestingMomentDate | Date | This field will be used on the LeadRecord in Marketo to house a copy of the Interesting Moment Date, making it available for use with the Vertify integration. |
|---|---|---|
| MKInterestingMomentDesc | String | This field will be used on the LeadRecord in Marketo to house a copy of the Interesting Moment Description, making it available for use with the Vertify integration. |

Action Item: Please follow the directions below

1. First, log into Marketo's Dashboard and follow these navigation steps:

2. Next, create the required custom fields outlined in the table above, following the naming conventions listed.
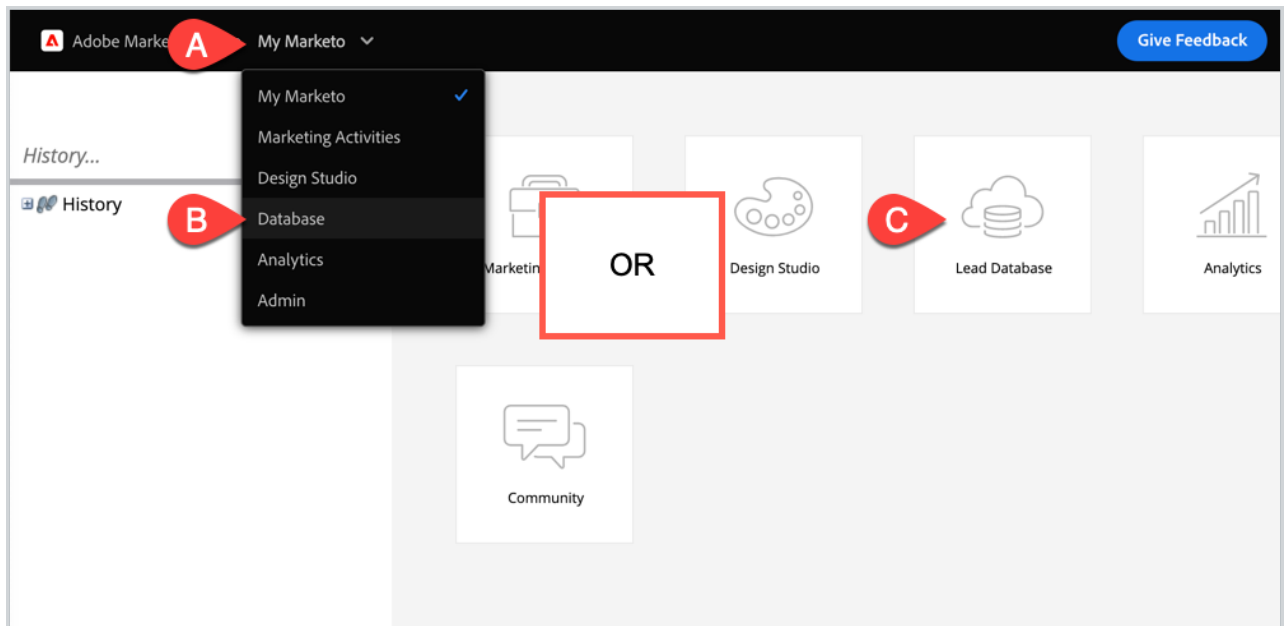
# STEP 2: CRM LEAD LIST CREATION

Marketo Static Lists are used by Vertify as a queue, housing LeadRecords qualified to move to the CRM.

Smart Campaigns (see STEP 3 below for instructions) determine which leads are eligible to populate these static lists.
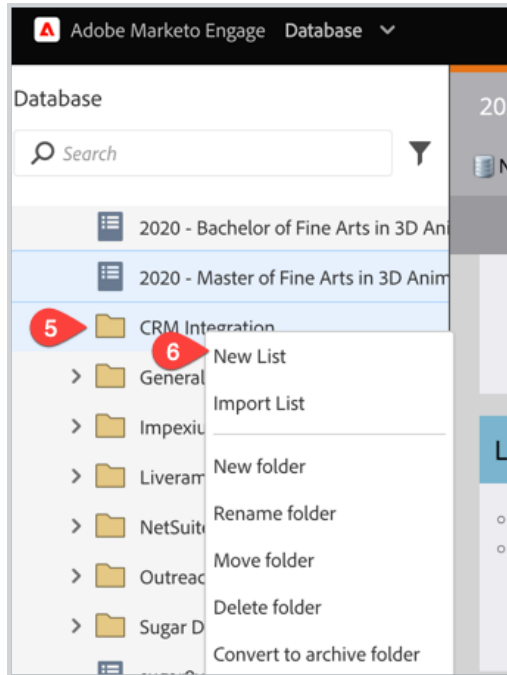
To create the two Static Lists, follow these steps:

1. Log in to Marketo.
2. Navigate to the **Database** (steps A and B OR step C).



3. Locate the **Group Lists** folder.
4. Right-click, choose **New Folder.**
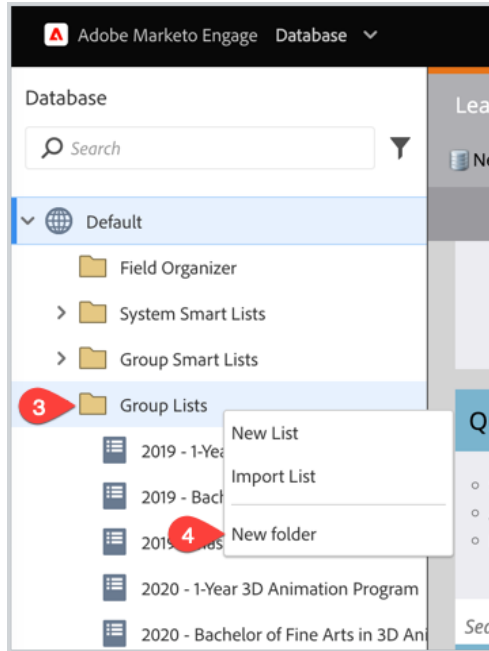
5. Name this folder **CRM Integration**.
6. Right-click the CRM Integration folder, choose **New List**.



7. Create **CRM Lead List**, including this description:
    i. "Vertify looks to this list as a queue of people who are qualified to move to the CRM. Vertify will NOT collect any leads that are not first added to this Static List via your Send to CRM or Lead Updates to CRM Smart Campaigns. In Vertify, this Static List's ID is defined on the Connect page (Define > Connect > MarketoREST > Static List)."
8. Create **CRM Activity List**.

    i.   "Vertify looks to this list as a queue of people who have qualified activities to move to the CRM. Vertify will NOT collect any activities that are not added to this Static List via your CRM Activity List Smart Campaign AND also listed on the Vertify Connect page (Define > Connect > MarketoREST > Include Activities). Additionally, this Static List's ID is defined on the Connect page (Define > Connect > MarketoREST > Filter Activity List)."

9. Click on the **CRM Lead List** - copy and paste the URL from the address bar.
10. Click on the **CRM Activity List** - copy and paste the URL from the address bar.
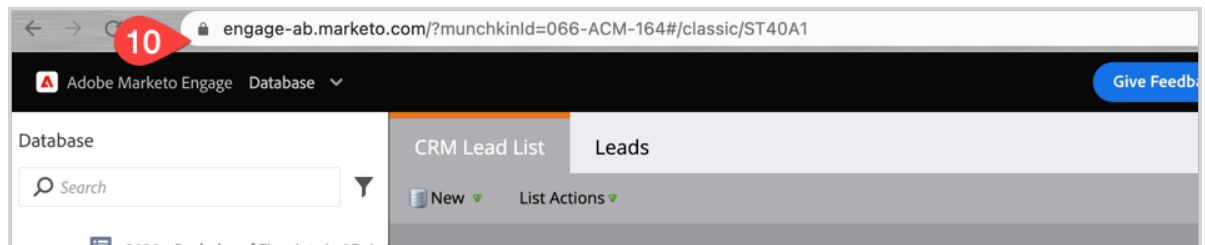


**Action Item:** Send both of the static list URLs to your Vertify Implementation Specialist.
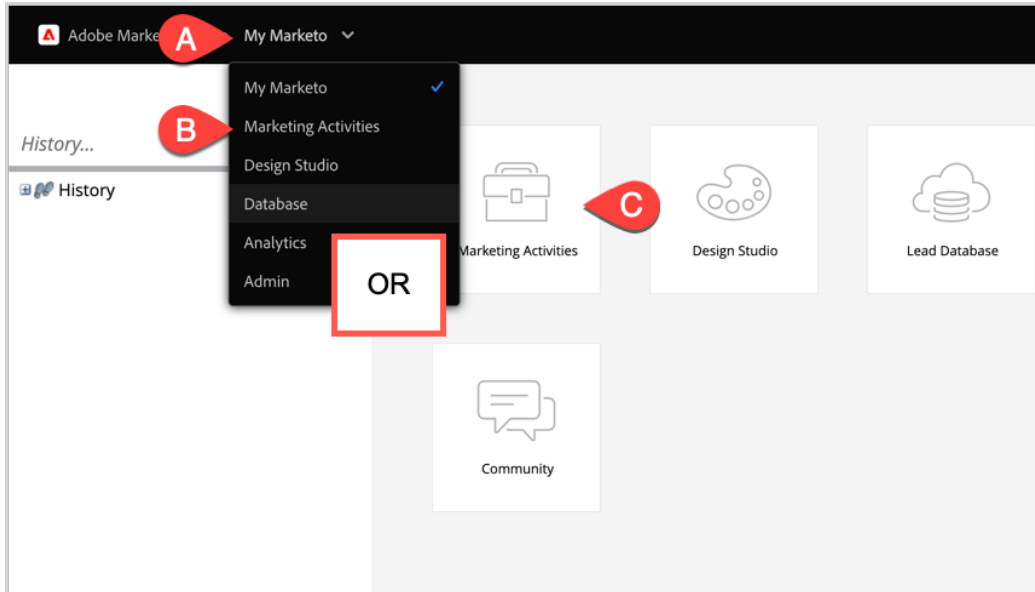
# STEP 3: SMART CAMPAIGN CREATION

Four different Smart Campaigns are needed in Marketo to correctly trigger and move person records to your newly created Static Lists. These allow Vertify to collect out Marketo data changes and move record updates to the CRM.
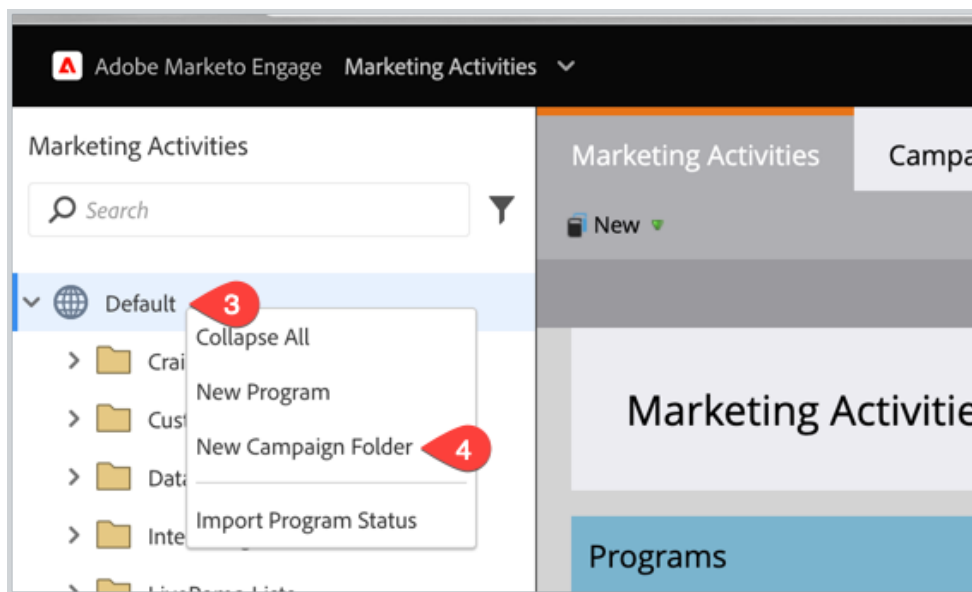
Below is our recommended standard approach; however, this can be customized further based on your process.
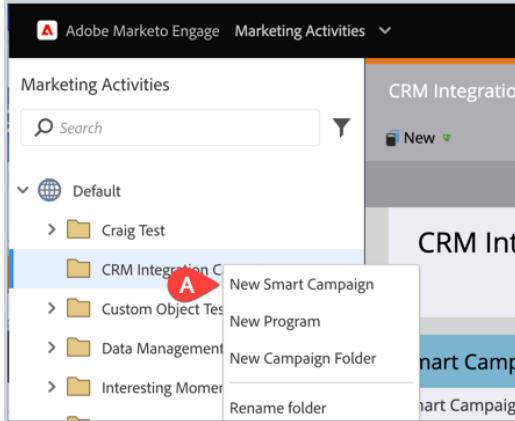
To create the four Smart Campaigns, follow these steps:

1. Log in to Marketo.
2. Navigate to the **Marketing Activities** tab (steps A and B OR step C).

3. Right-click on Marketing Activities.
4. Create a folder called CRM Integration Campaigns.



a. Within this folder, create four Smart Campaigns: CRM Activity List, Send to CRM, Lead Updates to CRM, and Copy Interesting Moments Field.

b. See below for descriptions of each Smart Campaign's purpose:
- CRM Activity List – this campaign is used to trigger up to 10 Marketo Activity Record Types to load into the CRM Activity List.
- Send to CRM – this campaign will auto-default newly submitted people to a "New" status and trigger new leads to be added to the CRM Lead List.
- Lead Updates to CRM – this campaign will account for person record changes in Marketo and will add leads to the CRM Lead List for updating in the CRM.

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- Copy Interesting Moment Fields (optional - available only if MSI is included) – this campaign will take the native interesting moment system fields that are unavailable to the API and copy them to custom fields so that they can be mapped in Vertify.
  - *Please note: this campaign is only applicable if interesting moments are included with your Marketo package; if not, please disregard.*

| Smart Campaign Name | Smart List Tab | Flow Tab | Schedule Tab |
|---|---|---|---|
| CRM Activity List | Add each of your selected Marketo Activity Types<br><br>Drag Trigger from right-hand column to left-hand open body space to add.<br><br>*Reference the Marketo Activity Questionnaire below | Add to List:<br>CRM Activity List | Each person can run through the flow every time. |
| Send to CRM | Person is Created<br><br>Drag Trigger from right-hand column to left-hand open body space to add.<br><br>Add constraint to exclude web service API records from moving through this campaign | Change Data Value:<br>CRMRecordType to "Lead"<br><br>Change Data Value:<br>SyncToCRM to "true"<br><br>Add to List:<br>CRM Lead List | Each person can run through the flow only once. |

| Lead Updates to CRM | Data Value Change: First Name | Add to List: CRM Lead List | Each person can run through the flow every time. |
| --- | --- | --- | --- |
| | Data Value Change: Last Name | | |
| | Data Value Change: Email Address | | |
| | *Customize to include other specific data value changes to trigger updates into CRM. | | |
| ***Copy Interesting Moment Fields*** (Optional) | Has Interesting Moment Drag Trigger from right-hand column to left-hand open body space to add. Type: is Email, Milestone, Web | Change Data Value: New Value {{lead.Last Interesting Moment Date}} Change Data Value: New Value {{lead.last Interesting Moment Desc}} | Each person can run through the flow every time. |

# STEP 4: MARKETO ACTIVITY TYPE SELECTION (OPTIONAL)

If you plan on integrating Marketo Activities from Marketo into your CRM, please reference the table below.

Note: Marketo allows for up to a maximum of 10 Activity types. Items labeled with (CampaignID) denote activities that we get CampaignID properties from when queried via the API.

Action Item: Select up to 10 Activity Types from the list below and provide the corresponding numerical IDs to your Implementation Specialist to configure. Keep in mind that these activities are limited by Marketo's API and are meant to inform the sales process in your CRM.

Note: If more than 10 types are needed, consider creating Interesting Moments to capture specific events instead of bringing over all activities of that type.

Common activities: 1,2,3,7,8,10,11,22

| Activity Type | Yes/No | Notes |
| --- | --- | --- |
| 1 - Visit Webpage - User visits a web page | | |
| 2 - Fill Out Form - User fills out and submits a form on web page | | |
| 3 - Click Link - User clicks link on a page | | |
| 6 - Send Email - Send Marketo Email to a person (CampaignID) | | *Not recommended - This activity exists for every lead that is created in Marketo. It doesn't provide any insight to the sales process because the lead coming from Marketo through the integration is essentially telling the same story. |

| | | |
|---|---|---|
| 7 - Email Delivered - Marketo Email is delivered to a lead/contact (CampaignID) | | |
| 8 - Email Bounced - Marketo Email is bounced for a lead (CampaignID) | | |
| 9 - Unsubscribe Email - Person unsubscribed from Marketo Emails (CampaignID) | | |
| 10 - Open Email - User opens Marketo Email (CampaignID) | | |
| 11 - Click Email - User clicks on a link in a Marketo Email (CampaignID) | | |
| 12 - New Lead - New person/record is added to the lead database | | *Not recommended - This activity exists for every lead that is created in Marketo. It doesn't provide any insight to the sales process because the lead coming from Marketo through the integration is essentially telling the same story. |
| 22 - Change Score - Modify the value of a score field | | **If you plan to use the Activity portlet for urgency, this activity is required. |
| 24 - Add to List - Add a person/record to a list | | *Not recommended - There will be many activities that cause a lead to be added to a list. This activity could overwhelm the integration. If a specific list activity could be useful in your CRM, then create an Interesting Moment to capture just that activity instead. |
| 25 - Remove from List - Remove this lead from a list | | *Not recommended - Similar to the "Add to List" activity, there will be many activities that cause a lead to be removed from a list. This activity could overwhelm the integration. If a specific list activity could be useful in your CRM, then create an Interesting Moment to capture just that activity instead. |
| 27 - Email Bounced Soft - Campaign Email is bounced soft for a lead (CampaignID) | | |
| 34 - Add to Opportunity - Add to an Opportunity | | |
| 35 - Remove from Opportunity - Remove from an Opportunity | | *Not recommended - Opportunities in Marketo are read-only objects. Any data associated with an Opportunity would have originated in your CRM, so there is no need to send this information back to the CRM. |
| 36 - Update Opportunity - Update an Opportunity | | *Not recommended - Opportunities in Marketo are read-only objects. Any data associated with an Opportunity would have |

| | | |
|---|---|---|
| | | originated in your CRM, so there is no need to send this information back to the CRM. |
| 38 - Send Alert - Send alert Email about a lead | | |
| 39 - Send Sales Email - Send Email using Sales View (Outlook Plugin) (CampaignID) | | |
| 40 - Open Sales Email - User opens a sales Email (CampaignID) | | |
| 41 - Click Sales Email - User clicks on a link in a sales Email (CampaignID) | | |
| 45 - Receive Sales Email - Receive Email using Sales View (Outlook Plugin) | | |
| 46 - Interesting Moment - Lead has an interesting moment | | **only applicable if you've purchased MSI. |
| 47 - Request Campaign - Campaign membership is requested for lead | | |
| 48 - Sales Email Bounced - Sales Email bounced (CampaignID) | | |
| 101 - Change Revenue Stage - Modify the value of a revenue stage field | | |
| 102 - Change Revenue Stage Manually - Revenue stage is changed manually (e.g. Lead Database or Salesforce) | | |
| 104 - Change Status in Progression - Change a Status in an program progression | | |
| 106 - Enrich with Data.com - Enrich a lead with information from Data.com | | |
| 108 - Change Segment - Change segment (within a segmentation) for a lead | | |
| 110 - Call Webhook - Call a Webhook | | |
| 111 - Sent Forward to Friend Email - User Forwards Email to a person/record | | |
| 112 - Received Forward to Friend Email - User receives forwarded Email from friend | | |
| 113 - Add to Nurture - Add a lead to a nurture program | | |
| 114 - Change Nurture Track - Change the nurture track for a lead | | |
| 115 - Change Nurture Cadence - Change the nurture cadence for a lead | | |
| 400 - Share Content - Share Content | | |
| 401 - Vote in Poll - Vote in a Poll | | |
| 405 - Click Shared Link - Click a Shared Link | | |

# STEP 5: MARKETO VERTIFY USER ACCESS

At the beginning of all implementation projects, we ask to be granted access to your Marketo Instance to be used for initial setup and troubleshooting during the implementation process.

It is preferred that users are created with an <u>Administrator</u> role to ensure that no permissions errors are encountered during the implementation.
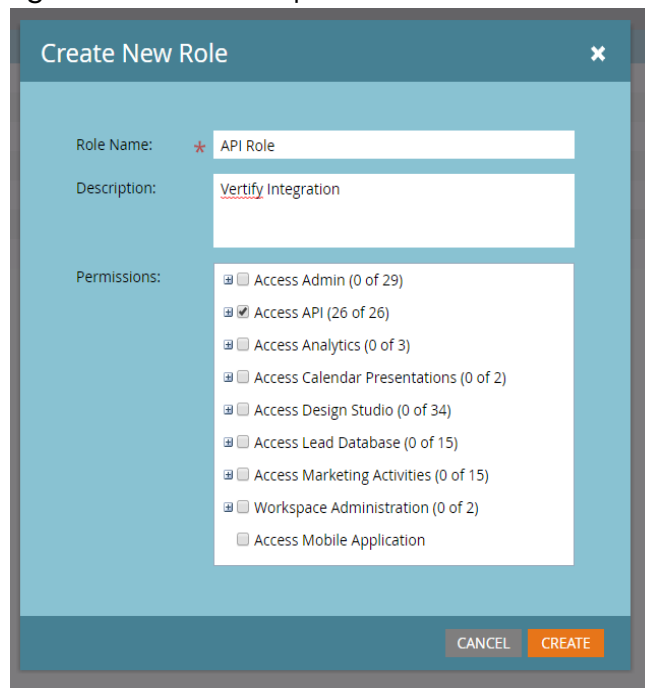
<mark>Action Item:</mark> Please create an Admin user in Marketo for the integration at this time and provide the login credentials to your Vertify Implementation Specialist. Follow this format when creating the log in: <u>passwords+clientname@vertify.com</u>

> Example: <u>passwords+vertify@vertify.com</u>

# STEP 6: MARKETO REST API CONFIGURATION

<u>Please follow these steps for establishing the Marketo REST API connection with Vertify:</u>

1. Create an <mark>API Role</mark>
   a. Navigate to the **Admin** tab in Marketo.
   b. Once on the Admin tab, locate **Users & Roles** on the left.
   c. Navigate to the **Roles** tab in the Users & Roles section.
   d. Under this tab, create a new Role labeled **API Role** with **Access API** permissions
   e. Enter **Vertify Integration** in the **Description** field:



2. Next, create an <mark>API User</mark>.

a. Note: This will be a separate user from the Vertify Admin user you created in step 5 above.
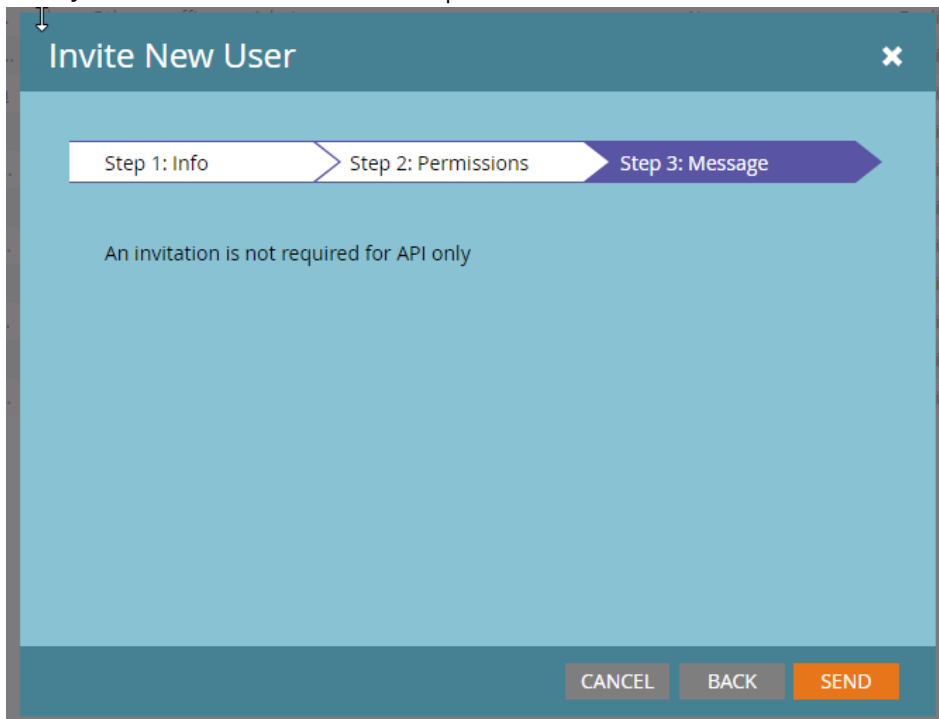b. Under the Users tab, select Invite New User and create the API user.



c. Please follow this format when creating the API user's 'fake' email address: [client name]VertifyAPI@Vertify.com
d. Enter Vertify for First Name, API User for Last Name
e. Under the Permissions tab, check the box for your newly created API Role from above
f. Check the box labeled API Only.

g. Finally, click **Next** and then **Send** (please note, no email will be sent):
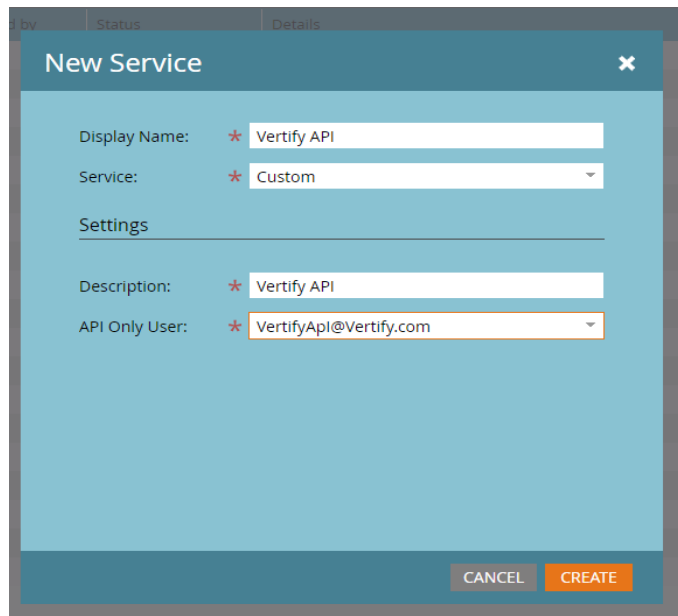
## Invite New User

Step 1: Info → Step 2: Permissions → **Step 3: Message**

An invitation is not required for API only

CANCEL    BACK    SEND

3. Next, navigate to the **Web Services** tab on the left.
   a. Once here, scroll down and <u>copy and save the REST API endpoint</u>.
4. Then, navigate to the **LaunchPoint** tab on the left.
   a. Under this section, select the **New** dropdown and choose **New Service**.
   b. Create a Custom Service with your recently created API User.

## New Service

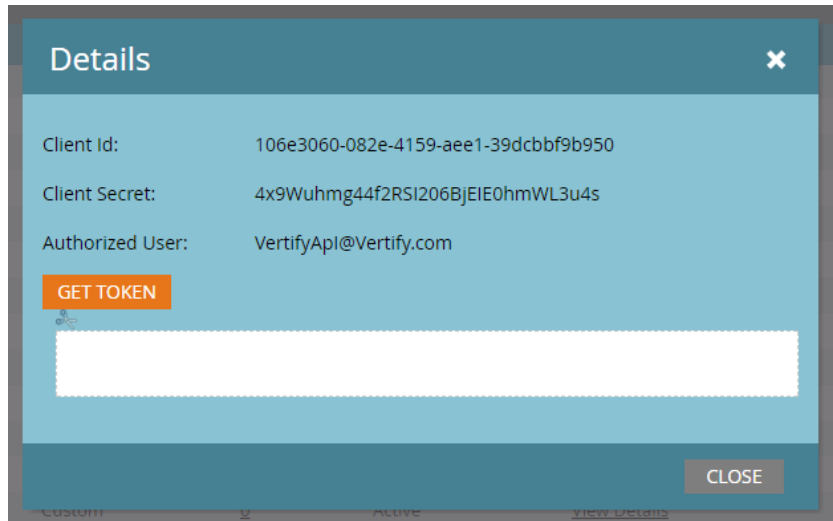| Display Name: | * | Vertify API |
| Service: | * | Custom |

### Settings

| Description: | * | Vertify API |
| API Only User: | * | VertifyApI@Vertify.com |

CANCEL    CREATE

5. Once the Service has been created, select the **Details** link next to the service to view the services credentials.

**Details**

| | |
|---|---|
| Client Id: | 106e3060-082e-4159-aee1-39dcbbf9b950 |
| Client Secret: | 4x9Wuhmg44f2RSI206BjEIE0hmWL3u4s |
| Authorized User: | VertifyApI@Vertify.com |

GET TOKEN

CLOSE

<mark>Action Item:</mark> Please send the Client ID, Client Secret, Authorized User, and REST API Endpoint URL to your Integration Specialist.

# INITIAL SETUP CHECKLIST

| | |
|---|---|
| Create Person Record Custom Fields | ✅ |
| Create Static Lists (Provide Static List URLS to Vertify) | ✅ |
| Create Smart Campaigns | ✅ |
| Create Vertify Marketo User and Send Access Email | ✅ |
| (Optional) Select 10 Marketo Activity Types (Provide to Vertify) | ✅ |
| Configure REST API Connection (Provide Vertify with REST API Endpoint, Client ID, Client Secret, and Authorized User) | ✅ |