

# Integrate with Marketo



If your company uses Marketo's marketing automation platform (MAP), you've likely invested considerable time and effort in managing lead data and audience segments. The next step is to integrate Marketo and Interaction Studio so you can leverage data collected in each system and build richer customer and prospect profiles to gain a deeper understanding of each lead. Using data from Marketo helps you to deliver more meaningful visitor experiences using Interaction Studio and passing behavioral and analytics data from Interaction Studio helps you better target your Marketo campaigns.



## Interaction Studio Classic Only

Please note, the contents of this article are intended for customers using Interaction Studio (formerly Evergage Classic). Do not adjust your beacon version to downgrade or upgrade.

### This Article Explains

This article details how to configure the Interaction Studio out-of-the-box integration with Marketo, which allows a bidirectional sync of Interaction Studio user attributes and Marketo lead fields, as well as a bidirectional membership sync of Interaction Studio segments and Marketo static lists.

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## Setup Authentication

The first step is to set up an OAuth connection to your Marketo account.

1. Log into *Marketo* and complete [the process](#) to set up an API connection



### NOTE

You will need to know the new OAuth *Client ID*, *Client Secret*, OAuth *Identity Endpoint* (URL), and *REST API Endpoint* (URL) for the following steps

2. Create a [new custom field](#) in Marketo with an API name of "evg\_Id" and type string (this is required for Interaction Studio to correctly match users)
3. Log into Interaction Studio as an administrator
4. Select **CHANNELS & CAMPAIGNS > Third Party > Integration Setup**
5. Select **Marketo**
6. Click [CONFIGURE](#)
7. In *Configure Connection*, enter the the following information (located in Marketo in *LaunchPoint* and *Web Services*) in the fields provided:
  - a. Client ID
  - b. Client Secret
  - c. OAuth Identity Endpoint (URL)
  - d. REST API Endpoint (URL)
8. Click **AUTHORIZE**

Marketo Integration

OAuth Credentials

Status: Not Configured

CONFIGURE

Configure Connection

Client ID

Client Secret

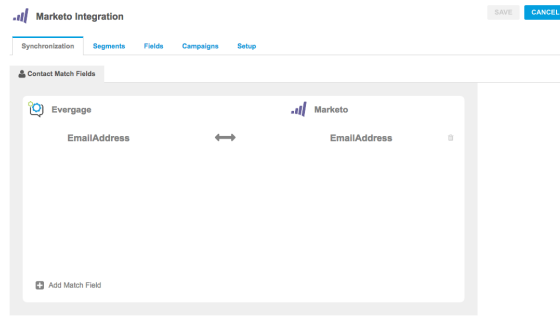
OAuth Identity Endpoint

REST API Endpoint

AUTHORIZE CANCEL

## Configure Match Fields

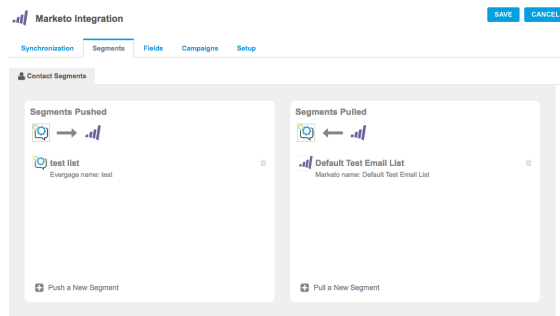
On the *Marketo Integration Synchronization* tab, *Contact Match Fields* connects fields in Interaction Studio with fields in Marketo for user identification. By default, the email address fields in Interaction Studio and Marketo are linked. If you need to link additional fields, please contact Support.



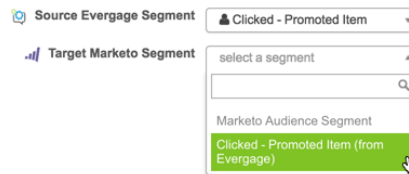
## Configure Segment Synchronization

On the *Marketo Integration Segments* tab, you can synchronize Interaction Studio segments to and from Marketo static lists, however Interaction Studio does not support synchronization to or from Marketo smart lists. You must create any Interaction Studio segments or Marketo lists before you can push to or pull from Marketo.

1. Click **Push a New Segment** or **Pull a New Segment**
2. Select the *Source Evergage Segment*
3. Select the *Target Marketo Segment* (called *Lists* in Marketo)
4. Click **OK**



### Add Push Segment

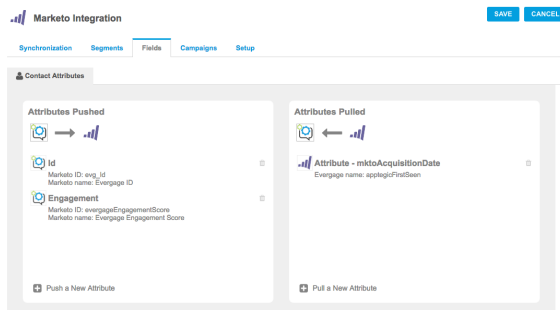


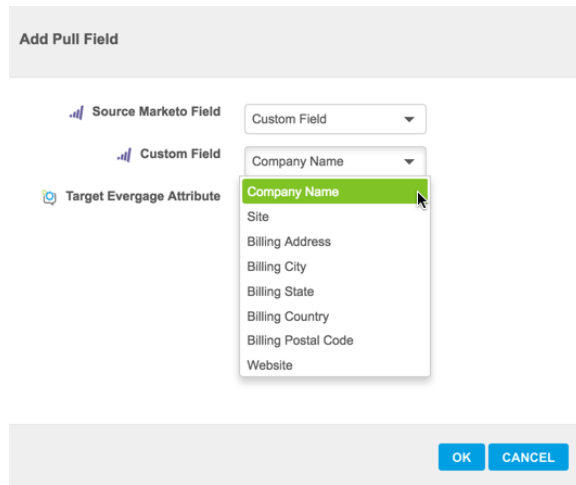
OK CANCEL

## Configure Field Synchronization

On the *Marketo Integration Fields* tab, you can select which attribute fields should be pulled from or pushed to Marketo. Fields being pushed to Marketo must be created in Marketo before they can be configured on the Fields tab. The destination field name and label are also configurable.

1. Click **Push a New Attribute** or **Pull a New Attribute**
2. Select the *Source Evergage Field*
3. Select the *Marketo Custom Field*
4. Click **OK**

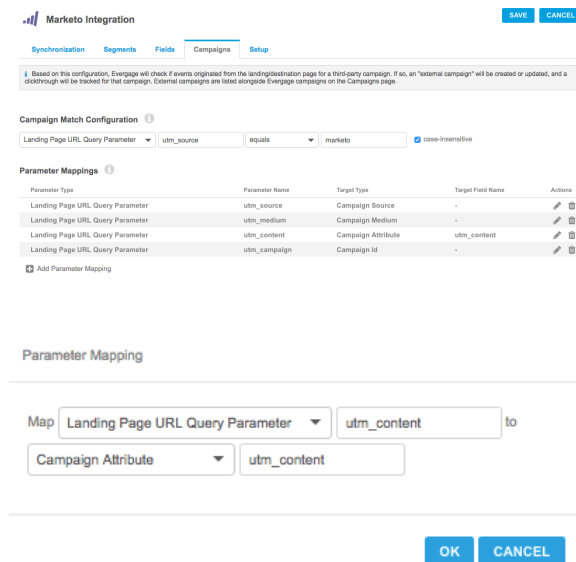




## Configure Campaign Detection

On the *Marketo Integration Campaigns* tab, you can configure third party campaign landing URLs to track different information about a campaign. When a matching URL is clicked for the first time, a campaign is created and will appear in Interaction Studio *CAMPAIGNS*. Any subsequent clicks will register impressions for the campaign.

1. Click **Add Parameter Mapping**
2. Set the *Parameter Type*
  - a. Landing Page URL Query Parameter
  - b. Referral URL Query Parameter
3. Enter the *Parameter Name*
4. Set the *Target Type* (optional)
  - a. Campaign ID
  - b. Campaign Name
  - c. Campaign Source
  - d. Campaign Medium
  - e. Campaign Attribute
  - f. Campaign Experience ID
  - g. User Attribute
5. Enter the *Target Field Name* (optional)
6. Click **OK**



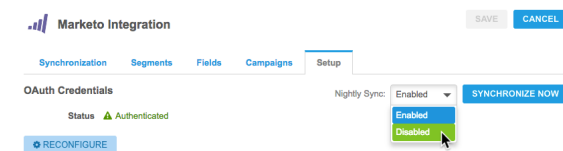
## Enable or Disable Synchronization

The integration will synchronize nightly, but you can disable automatic synchronization or perform a manual synchronization at any time.

### NOTE

If you would like to reduce the number of daily API calls, please refer to [Restrict Lead Matching to a Marketo List](#) which details the option to limit synchronization to a specific Marketo list.

1. Select **Setup**
2. Select **Disabled** to disable *Nightly Sync*
3. Click **SYNCHRONIZE NOW** to immediately begin the synchronization. This will not disrupt nightly synchronization, if enabled



## Troubleshooting

If the synchronization does not work as expected, please contact support.

