



Connectors (including Marketo Jobs)

This document is an introduction to the two **Connectors** pages in Certain, and the “**Jobs**” you run on them (which are described in general overleaf, on page 2).

It describes Certain’s pre-built jobs for connecting to the Marketo marketing platform, which are provided as working examples for more advanced integrations. See page 3 for details of those jobs.



The two **Connectors** pages (see page 5) are:

- **(Event) > Plan > Configure > Connectors** – *event-level* jobs, for Administrators and Event Builders
-   **Account Settings > Implementation > Connectors** – *account-level* jobs (Administrators only)

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Initial One-Off Setup

In your account, Certain needs to have enabled **Marketo** integration.

If you are using a sub-account, your Administrator needs to do the same:

1. Go to **Account Settings > Implementation > Products > Integration**
2. Select **Marketo**

In the account (and/or sub-account), your administrator needs to set up the **Marketo Plugin**:

1. Go to **Account Settings > Implementation > Products > Plugins**
2. Click **Add New**, and complete the following details for the new plugin:
3. **Third-party Account** – select “**Marketo**”.
4. **SOAP UserID** –
5. **SOAP Encryption Key** –
6. **SOAP Endpoint** –
7. **Certain Profile to Marketo Lead Field Mapping** – Select which Profile fields in Certain map to which Lead fields in Marketo. These will be used by integration jobs that add or update records in Certain based on data in Marketo, or vice versa, as described in this guide.

Values for these three fields are found in Marketo, under Admin>Integration>SOAP API

A number of default mappings are provided. To edit one, select the relevant field in the drop-down lists of **Certain Profile Fields** and **Marketo Lead Fields**.

To add a new mapping, click **Map a new field** and select a field in each of the two drop-down lists.

Caution: Once you have saved your field mappings:

If you need to change any of the credentials, such as **UserID**, save the new credentials first, and then map the fields again.

Otherwise your custom field mappings would be overridden by the original defaults.

Tip: After saving, edit the plugin. If the Certain to Marketo field mappings are not displayed then there is an issue with your credentials; confirm your credentials are valid and then start over.

Jobs

What are Jobs?

Each "job" is a pre-defined program, developed using the Certain API, to connect to a target application – Marketo is the target application in this document. A job runs in the background as a batch job, drawing data from that application into Certain, and/or sending data from Certain to that application.

A job which is an update to Certain includes the definition of the extraction from the target application, the mapping of fields in the target application to equivalent fields in Certain (configured in the plugin described on page 1), the logic involved, and the addition or update of data in Certain.

Vice versa, a job which is an update of the target application *from* Certain still includes pre-configured field mappings and logic, and pushes data to the other application.

Each time you run a job, you choose whether to do so just the once, or on a recurring basis. If the latter, you have a lot of flexibility about when and at what frequency the job runs. For example, you might run an Import job from Marketo into Certain prior to going live with registration, so that the profile information of your leads is prepopulated when they access a registration form and register for the event. And you might run outbound jobs from Certain to Marketo regularly, starting after registration begins and ending after the event is over.

What Marketo Jobs can I run?

Job	Level	Run from
1. Import Marketo Leads as Profiles	Account	Account Settings > Implementation > Connectors
2. Import Marketo Leads as Registrations	Event	Plan > Configure > Connectors
3. Trigger Marketo Campaign	Event	Plan > Configure > Connectors
4. Create or Update Leads in Marketo	Event	Plan > Configure > Connectors
5. Upload Engagement Metrics to Marketo	Event	Plan > Configure > Connectors
6. Upload Interest Metrics to Marketo	Event	Plan > Configure > Connectors

What do these jobs do?

- **Import Marketo Leads as Profiles**

This job enables you to specify a static list of leads from Marketo and import those leads into Certain as profile records.

- **Import Marketo Leads as Registrations**

This job enables you to specify a static list of leads from Marketo, and import those leads into Certain as registrations and profile records. If a Certain profile does not exist for a lead (based on email address or Marketo ID), then a new profile is created. If a Certain profile *does* already exist for a lead (based on email address or Marketo ID), then the registration is associated with that profile.

- **Trigger Marketo Campaign**

This job enables you to specify a Marketo campaign (via its ID) to be triggered by a registration status change in Certain for that lead (from *Invited* to *Pre-Registered*, for example). A sample trigger would be to update the campaign progression status in Marketo to *Registered*.

What unique identifiers are used to trigger a campaign in Marketo?

When a lead is imported* from Marketo, the **Marketo ID** is placed in the Certain **External Profile ID** field and the **Source of Profile** is set to *Marketo*.

*(It may have been imported via the **Import Marketo Leads as Registrations** job, or the **Import Marketo Leads as Profiles** job, notes above.)

The same Certain fields are updated by the **Create or Update Leads in Marketo** job described next.

If those fields are populated, the Trigger Marketo Campaign job uses them. If they're not populated, then the job finds or creates the matching lead in Marketo, and updates the Certain record.

See the appendix on page 11 for Marketo screenshots illustrating this job and its configuration.

- **Create or Update Leads in Marketo**

This job enables you to create new Marketo leads, and update existing ones (matched on email address), from event registrations of specified statuses. Any blank fields in Certain do not affect the equivalent fields in Marketo, since blank fields are not sent to Marketo.

The job also updates the profile in Certain, setting its **External Profile ID** to the **Marketo ID**, and its **Source of Profile** to "Marketo"; the Trigger Marketo Campaign job will therefore include registrations for these profiles.

- **Upload Engagement Statistics to Marketo**

This job enables you to upload numbers and average ratings of attendees' sessions and appointments from Certain to Marketo, where they inform behavioral scoring.

Several of the statistics require particular modules to be enabled for the event in Certain. For example, whilst the numbers of sessions registered and attended are always uploaded, such numbers for appointments require the Appointments module to be enabled, and average ratings (for sessions and appointments) require the Event Views and or Certain Mobile modules. For full details, please see the separate guide to **Interest and Engagement Metrics with Certain and Marketo**.

For illustrations of the Marketo setup steps from that guide, see the **Appendix** on page 14 of *this* guide, where they are repeated for convenience.

This **Upload Engagement Statistics** job, and the **Upload Interest Scores to Marketo** job described next, require two custom objects to be set up in your instance of Marketo. To organize that, you contact your account rep at Marketo to request setup instructions for custom **CertainEngagementMetrics** and **CertainInterestPoints** objects, complete that form, and email it to services@marketo.com.

- **Upload Interest Metrics to Marketo**

This job enables you to upload interest-based metrics per account-level tag assigned to agenda items for which the attendee is registered in the event, using the numbers of points assigned to the agenda items. This is explained in more detail in the separate guide to **Interest and Engagement Metrics with Certain and Marketo**.

This job and the **Upload Engagement Statistics** job described above require two custom objects to be set up in your instance of Marketo; see the note under that job above.

Two Connectors Pages

There are two **Connectors** pages in Certain: one at the account level, and one at the event level, as described below.

1. **(Event) > Plan > Configure > Connectors** – The *event-level* page, for Administrators and Event Builders.
2. **Account Settings > Implementation > Connectors** – The *account-level* page, for Administrators only.

When you go to either of them, you see a list of the jobs at that level. You can add new jobs (see below, page 5), see more details of existing jobs (page 9), or remove jobs from the list (page 9).

At the event level

To see a list of all jobs in the current *event*, go to:

- **(Event) > Plan > Configure > Connectors.** (This is available to Event Builders and Administrators.)

For more about this page, see the account-level page described next, since they have so much in common. And the use of the **New Event Job** button is described in the following section, “Running a Job” (page 6).



At the account level

To see a list of all jobs in the current *account*, go to:

- **Account Settings > Implementation > Connectors.** (This is only available to Administrators.)



The information shown about each job is the same on both pages: the **Event**, the target **Application**, the **Job** description, the **Date** its **Status** last changed, its current **Status**, and the nature of its **Schedule** (if any – see **Scheduling a Recurring Job** on page 8).

In addition, there is an **Actions** column: see page 9 for details of the actions you can take on a job.

Above the list of jobs are some buttons, including one or two to run a **New...Job** (see the next section, “Running a Job”) and one to **Clear All Jobs** (which removes the “Terminated” jobs from the list).

Running a Job

You run a job from the relevant **Connectors** page, depending on whether it is an event-level or account-level job, and whether you are an Event Builder or an Administrator.

1. To run an *event-level* job (especially as an Event Builder):
 - a. In that event, go to **Plan > Configure > Connectors**
 - b. Click **New Event Job**
2. To run an *account-level* job:
 - a. As an administrator, go to **Account Settings > Implementation > Connectors**
 - b. Click **New Account Job**
3. To run an *event-level* job (as an Administrator) from the account page:
 - a. As an administrator, go to **Account Settings > Implementation > Connectors**
 - b. Click **New Event Job**
 - c. You see a list of the account’s events.
 - d. If the list is long, you can filter it by typing any part of a name in **Filter Events by Name**.
 - e. Select the event in which to run the job, and click **Next**.

In each case, the **New Job Configuration** section is displayed. The only difference is which jobs are available to be run. (See the list on page 3.)

New Job Configuration

Enter the details in the **New Job Configuration** section, illustrated below, and click **Submit Job**.

Connectors

New Job Configuration

Application	Marketeto
Job Name	Import Marketo Leads as Registrations
Job Description*	Import Marketo Leads as Registrations
Profile Entry Deduplication*	<input type="radio"/> Create or update profiles - use email address as unique identifier <input type="radio"/> Create or update profiles - use Marketo ID/External Profile ID as unique identifier <input type="radio"/> Create new profile if email not found <input type="radio"/> Create new profile if Marketo ID/External Profile ID not found
Marketo Static List Name Containing Leads*	<input type="text"/>
Marketo Retrieval Page Size*	500
Attendee Type Code*	-- Select Option --
Registration Status*	-- Select Option --
Maximum Records to Retrieve (0 for all)*	<input type="text" value="0"/>
<input checked="" type="radio"/> Run Once <input type="radio"/> Schedule Recurring Job	

Note that the actual fields displayed depend upon the **Application** and **Job** selected, so any screenshots and descriptions here are only indicative examples.

The example above is for an event-level job that imports leads from Marketo, adding them as registrations in Certain.

When you are submitting a job, some of the fields are always present, but most are specific to the selected job, such as in the screenshot above and described below.

For all Jobs:

- **Application** – Select **Marketeto** as the target application.
- **Job Name** – Select the job to be submitted. (The jobs available are those specific to the **Application** selected, as listed for Marketo on page 3.)
- **Job Description** – Enter a description, to be seen in the list of jobs. The initial default value is the name of the job.
- **Email for Job Notifications** – If the job fails, details will be emailed to this address.

Job-specific fields:

Each job has a number of fields specific to it. If they're not self-explanatory, see details in the online help for that page. For example, for the job illustrated above:

- **Profile Entry Deduplication** – Select an option to determine how potential duplicate profile records are to be identified and handled.
- **Marketo Static List Name Containing Leads** – The *exact* name of the Marketo Static List that you would like to import as profiles or registrations.

Note: Static list names are not unique across programs in Marketo. To specify the program that the list is associated with, use the format **programname.listname** when entering the name of your static list.

- **Marketo Retrieval Page Size** – We recommend leaving this at the default value of **500**, which is the maximum value allowed by Marketo
- **Maximum records to retrieve (0 for all)** – We recommend leaving this at the default value of **0** so that *all* leads on the list are returned
- **Profile Entry Deduplication** – Select an option to determine how potential duplicate profile records are to be identified and handled.
- **Attendee Type Code and Registration Status** – Select the Attendee Type and Registration Status to be used for the registrations created by the import.

For all jobs:

- **Run Once** – If selected (as in the screenshot), the job is run when you click **Submit**.
- **Schedule Recurring Job** – If this is selected instead of **Run Once**, additional fields are displayed: see **Scheduling a Recurring Job** below (page 8) for details.

Note that in the present implementation, nearly *all* fields are required.

Click **Submit Job** to submit your job. It is then included in the list of jobs.

Scheduling a Recurring Job

If you select the **Schedule Recurring Job** radio button, instead of **Run Once**, then additional fields are displayed, as explained below (for event-level jobs).

First Run Date and **Last Run Date** – Define the period for which the job should run. For each of those two, select one of the four options:

- **Event Start Date** – Select + or -, and enter the number of days.
Example:
 - Your event's **Start Date** is June 1
 - You select "-" and enter "3"
 - The job will first run or last run on May 29
- **Event End Date** – Select + or -, and enter the number of days.
Example:
 - Your event's **End Date** is June 3

- You select "+" and enter "7"
- The job will first run or last run on June 10
- **Job Create Date** – Enter the number of days. The job will first run that number of days after the date you create the job.
Example:
 - You create the job on May 30, and accept the default of "0" (days)
 - The job will first run on May 30
- **Fixed Date** – Click the text box to select the date from the calendar that's displayed. The job will first

run or last run on that date.





You can then select the frequency at which the job must run: **Every ... hour, day, week, or month:**

And based on that choice you provide more detail about when the job must run:

- For **Every hour**: the number of minutes past the hour (00 to 59).
- For **Every day**: the time at which to run the job.
- For **Every week**: the day of the week (Sunday to Monday), and the time on that day.
- For **Every month**: the day of the month (1st–31st), and the time on that day.

Actions¹

The **Actions** column in the list of jobs on the **Connectors** page includes the following icons for each job.

- View the job's event log. ("Event" here is a technical term, referring to the things that happen during the execution of a job.)
-  – View the job's messages
-  – View the job's errors if it failed
(*Note:* When a job fails, the same details are emailed to that job's **Email for Job Notifications**.)
-  – Edit the job
-  – Check the job's history
- Remove the job from the queue (even if it is running!), and delete it from the list.

Best Practice Recommendations

Target List Segmentation

Perform your event invitee target list segmentation in Marketo, and place all of your targeted leads onto a static list. This list will be specified as part of the job configuration that will import those leads into the target Certain event as partial registrations.

Linking to a Certain Registration Form in a Marketo Email

Email Marketing can continue to be performed out of Marketo. However, when you link to the Certain registration form for the event, you can dynamically append the Marketo ID to the end of the registration form as a variable like this:

```
http://app.certain.com/profile/form/index.cfm?PKformID=0XXXXXXXXabcd&pro_external_frn_key=<(Marketo ID)>
```

Because the lead will already exist in Certain, and the Marketo ID will have been imported into the field (`pro_external_frn_key`), the record will be recognized when the form is accessed and the attendee's profile information will be prepopulated.

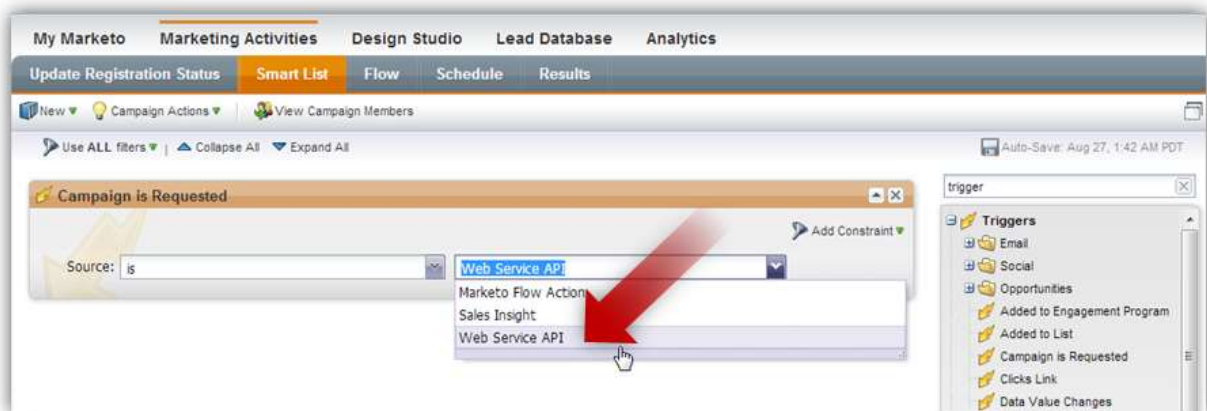
Appendices: Marketo Screenshots

Appendix 1:

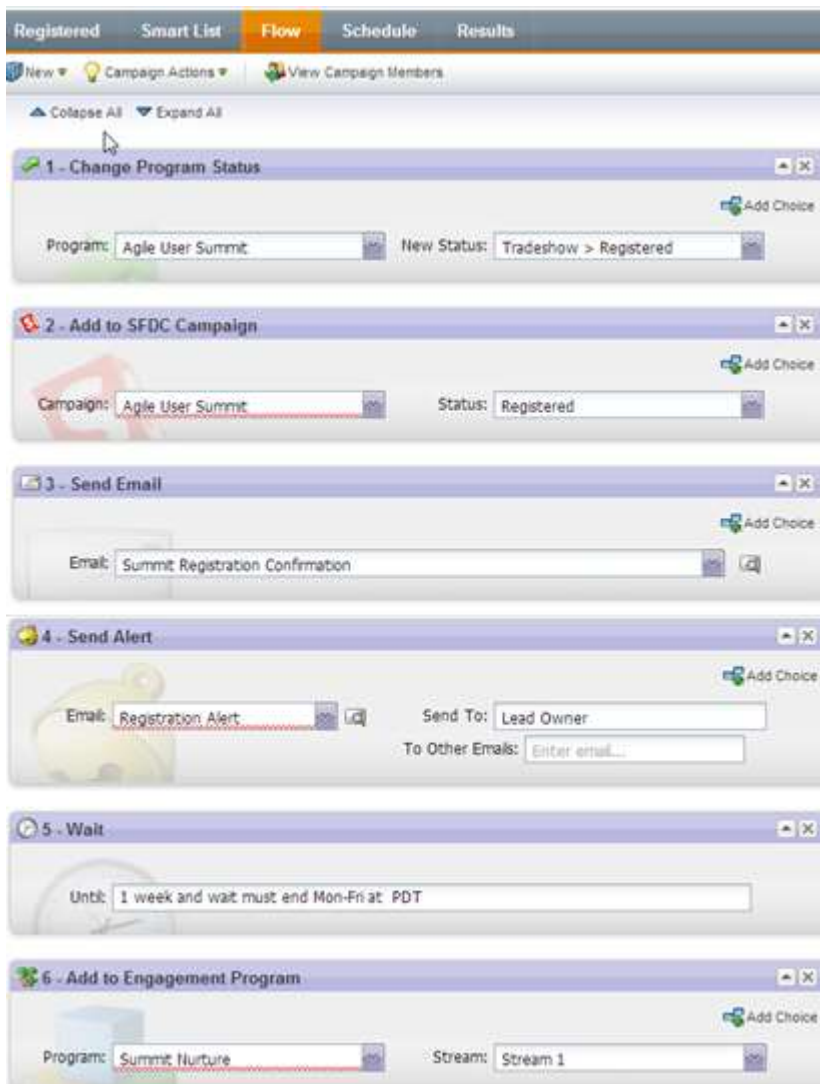
Marketo Screenshots for the Trigger Marketo Campaign job

The **Trigger Marketo Campaign** job is described on page 3. The screenshots below illustrate some of the Marketo side of that.

1. When you set the filters for your Smart List within the campaign in Marketo, you must add the **Campaign is Requested** trigger, and set its **Source** to “Web Service API”.



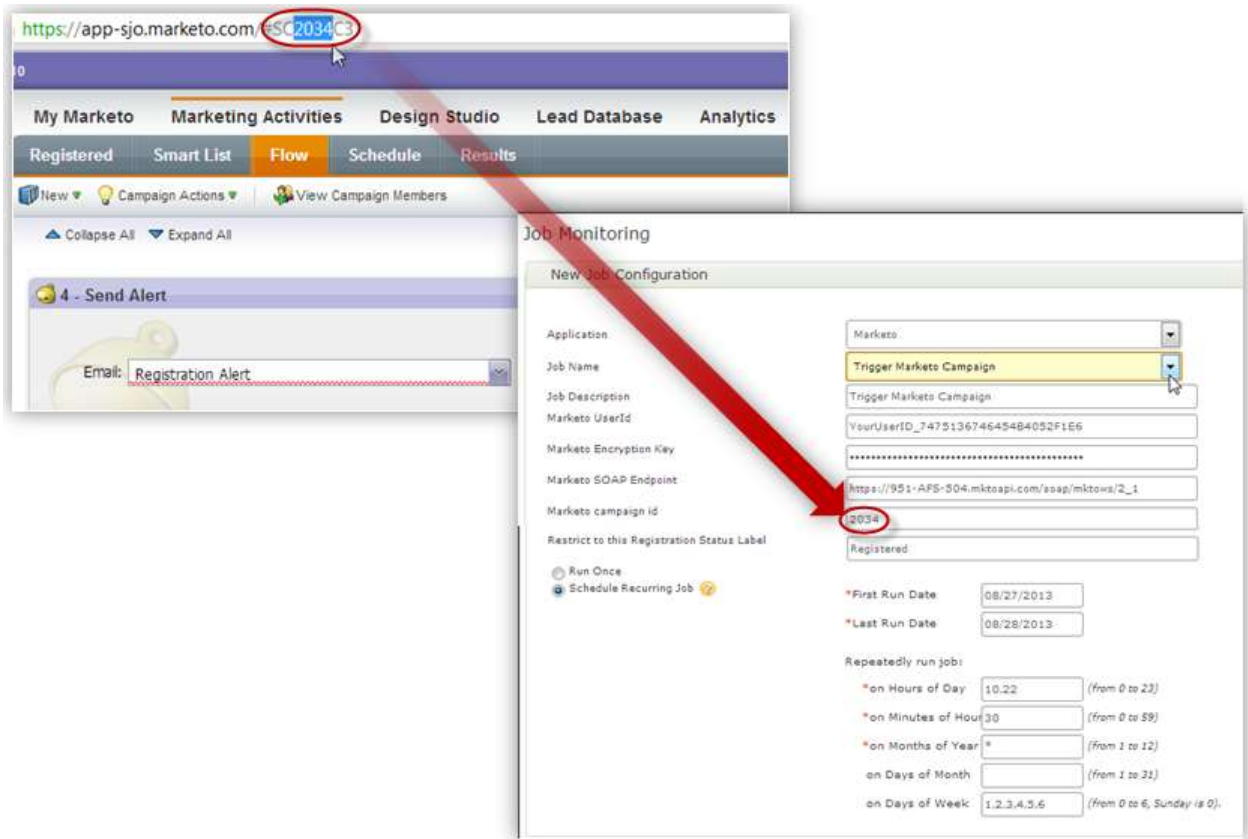
2. Here is a sample campaign flow that could be set up in Marketo once the campaign is triggered.



The screenshot displays a Marketo campaign flow configuration interface. At the top, there are tabs for 'Registered', 'Smart List', 'Flow' (which is selected), 'Schedule', and 'Results'. Below the tabs, there are options for 'New', 'Campaign Actions', and 'View Campaign Members'. The flow consists of six steps:

- 1 - Change Program Status:** Program: Agle User Summit, New Status: Tradeshow > Registered.
- 2 - Add to SFDC Campaign:** Campaign: Agle User Summit, Status: Registered.
- 3 - Send Email:** Email: Summit Registrabon Confirmation.
- 4 - Send Alert:** Email: Registration Alert, Send To: Lead Owner, To Other Emails: Enter email...
- 5 - Wait:** Until: 1 week and wait must end Mon-Fri at PDT.
- 6 - Add to Engagement Program:** Program: Summit Nurture, Stream: Stream 1.

- To get the **Marketo Campaign ID** to use in the job in Certain, look at the URL when you are viewing the campaign in Marketo.



The image shows two overlapping screenshots. The top screenshot is a Marketo interface with the URL `https://app-sjo.marketo.com/SC2034` in the address bar, where 'SC2034' is circled in red. Below the navigation bar, there are tabs for 'Registered', 'Smart List', 'Flow', 'Schedule', and 'Results'. The 'Flow' tab is active, showing a '4 - Send Alert' job with an email address 'Registration.Alert'. The bottom screenshot is the 'Job Monitoring' section in Certain, showing a 'New Job Configuration' form. A red arrow points from the circled 'SC2034' in the Marketo URL to the 'Marketo campaign id' field in the Certain form, which also contains '2034' circled in red. Other fields in the form include 'Application' (Marketo), 'Job Name' (Trigger Marketo Campaign), 'Marketo UserId' (YourUserID_747513674645484052F1E6), 'Marketo SOAP Endpoint' (https://951-AFS-504.mktops.com/soap/mktows/2_1), and 'Restrict to this Registration Status Label' (Registered). There are also fields for 'First Run Date' (08/27/2013) and 'Last Run Date' (08/28/2013), and a section for 'Repeatedly run job' with options for hours, minutes, months, days, and days of week.

Appendix 2: Marketo Screenshots for the Upload Engagement Statistics to Marketo job

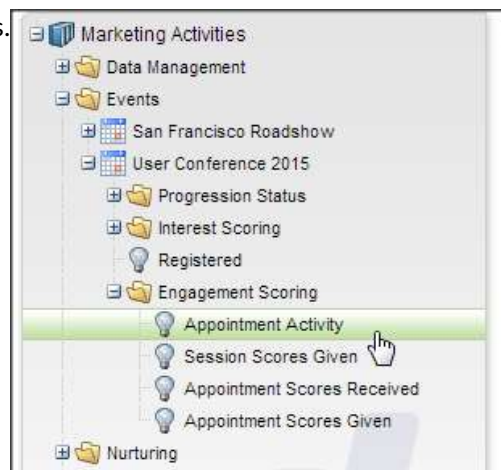
The **Upload Engagement Statistics to Marketo** job is described on page 4. The screenshots below illustrate some of the Marketo side of that. They come from the more detailed guide to that job: **Interest and Engagement Metrics with Certain and Marketo**.

1. Behavioral Score

Set up a **Behavioral Score** field in Marketo.

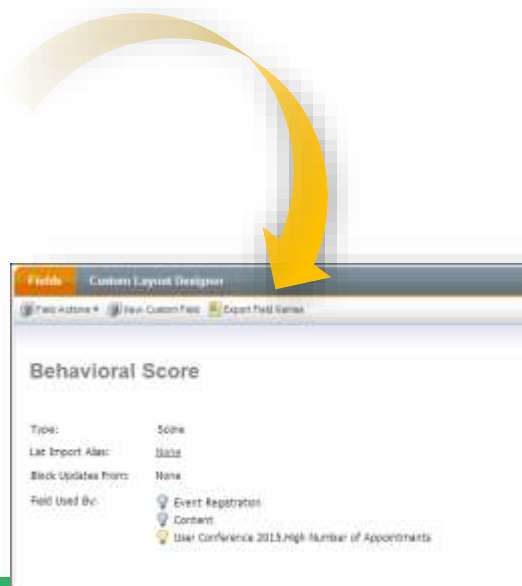
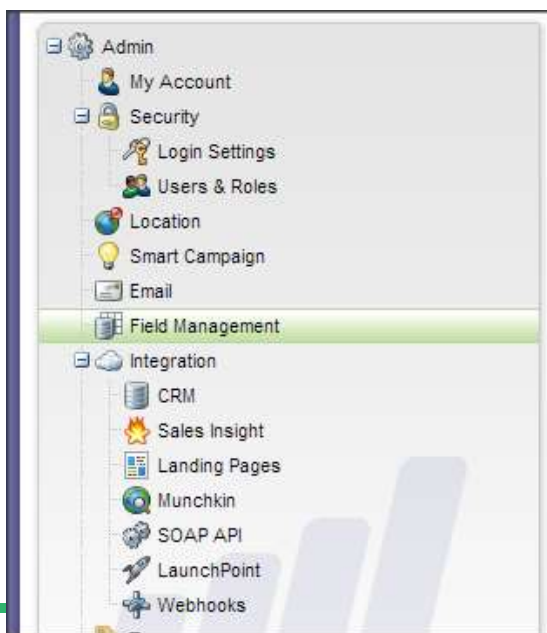
2. Create Campaigns

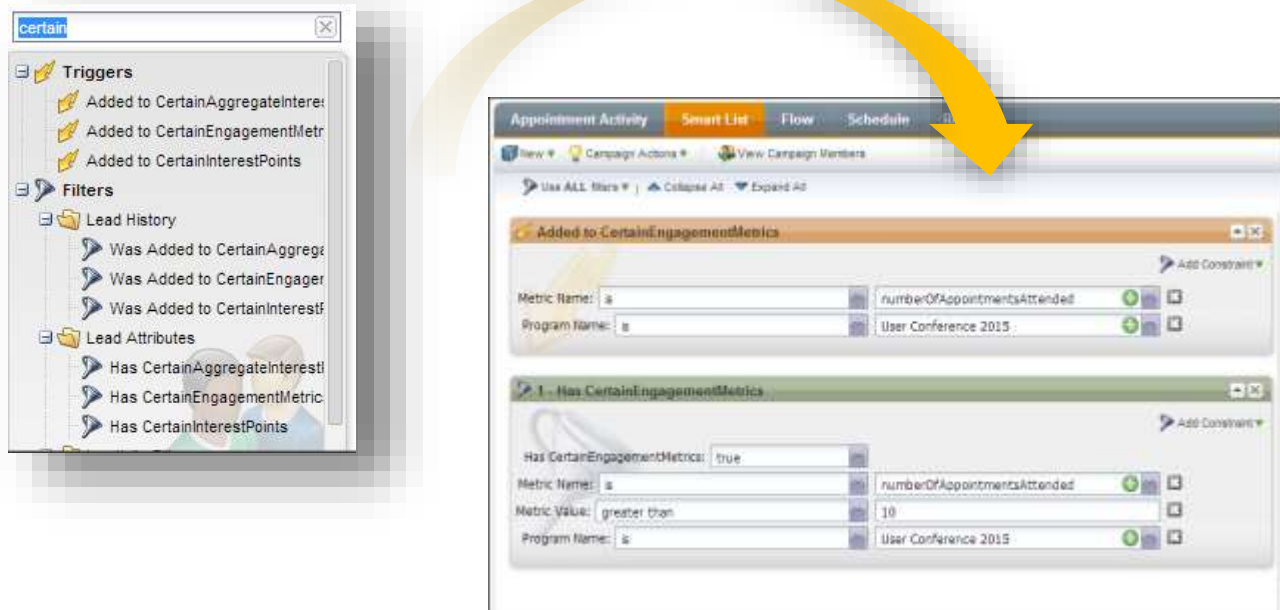
Create campaigns under event program for scoring event engagements.



3. Campaign Smart List

Campaign smart list. Look up criteria by searching for "certain".





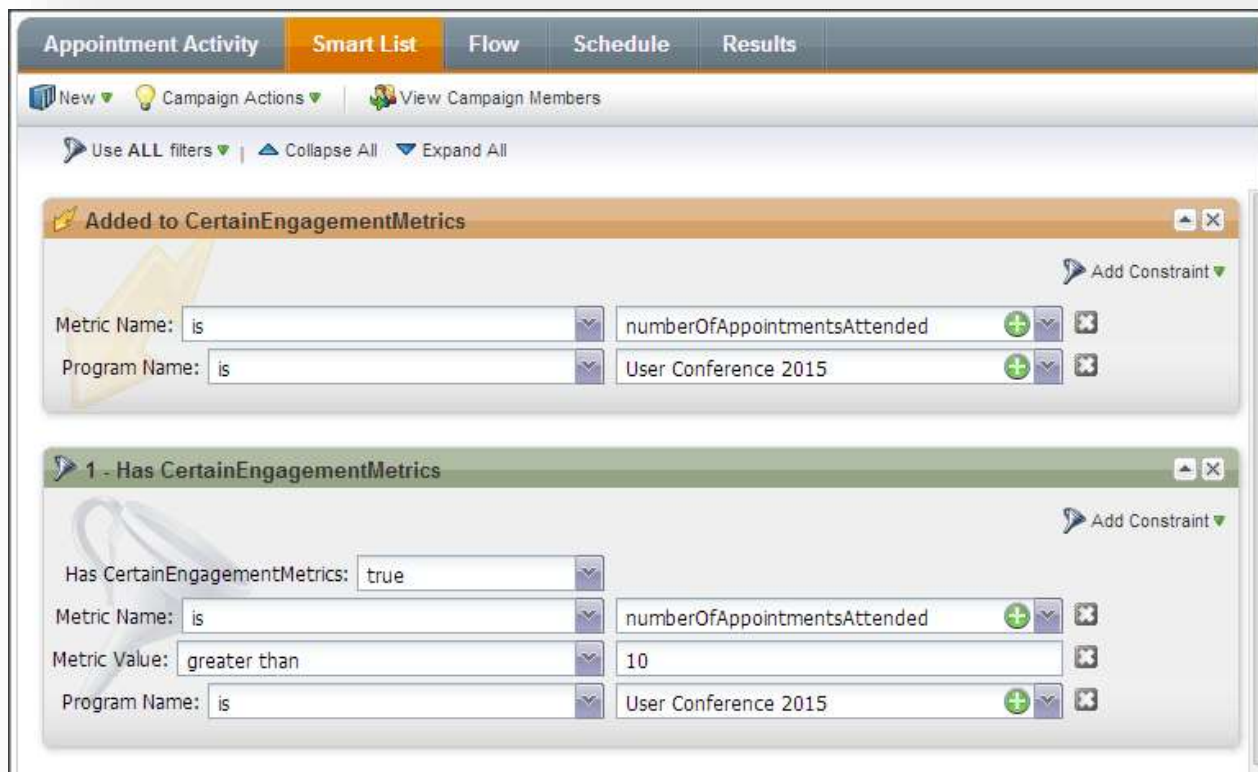
4. Define Trigger or Filter Criteria

Define trigger or filter criteria, which can be based on any value.

Use range to define criteria (e.g. number of appointments is greater than x).

Must define program name.

(See screenshot overleaf.)

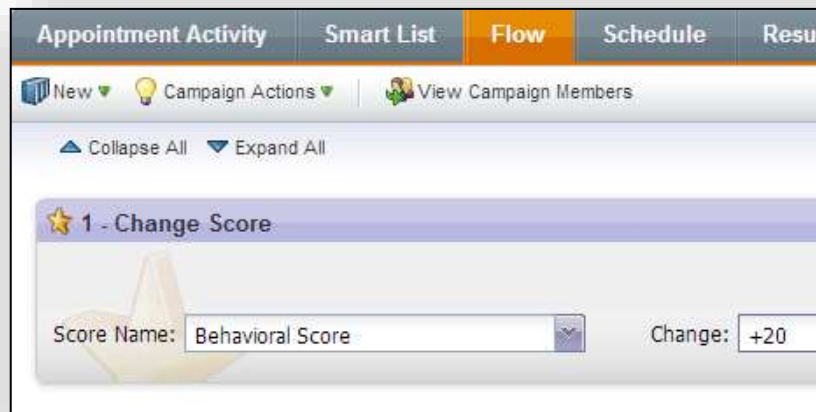


The screenshot shows the 'Smart List' configuration interface with the following details:

- Navigation:** Appointment Activity | **Smart List** | Flow | Schedule | Results
- Tools:** New, Campaign Actions, View Campaign Members
- Filters:** Use ALL filters, Collapse All, Expand All
- Rule 1: Added to CertainEngagementMetrics**
 - Metric Name: is numberOfAppointmentsAttended
 - Program Name: is User Conference 2015
- Rule 2: 1 - Has CertainEngagementMetrics**
 - Has CertainEngagementMetrics: true
 - Metric Name: is numberOfAppointmentsAttended
 - Metric Value: greater than 10
 - Program Name: is User Conference 2015

5. Define Campaign Workflow Steps.

Translate engagement into a behavioral score value



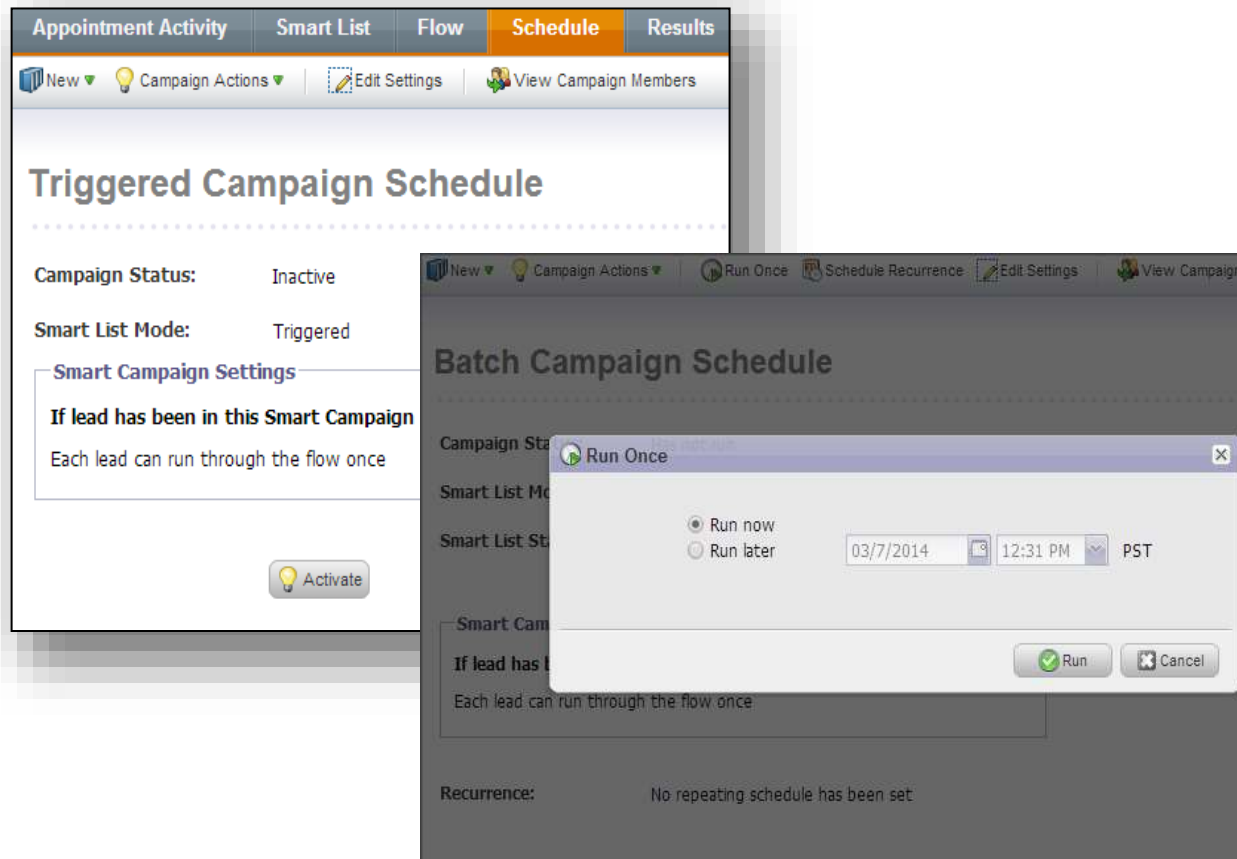
The screenshot shows the 'Flow' configuration interface with the following details:

- Navigation:** Appointment Activity | Smart List | **Flow** | Schedule | Results
- Tools:** New, Campaign Actions, View Campaign Members
- Filters:** Collapse All, Expand All
- Step 1: 1 - Change Score**
 - Score Name: Behavioral Score
 - Change: +20

6. Activate Trigger Campaign or Schedule Run.

Best Practice: Schedule run once after event.

For triggered run, ensure campaign is set to run only once per lead.



The image shows two overlapping screenshots from a software interface. The background screenshot is titled "Triggered Campaign Schedule" and shows a campaign status of "Inactive" and a smart list mode of "Triggered". It includes a section for "Smart Campaign Settings" with the condition "If lead has been in this Smart Campaign" and the rule "Each lead can run through the flow once". An "Activate" button is visible at the bottom. The foreground screenshot is titled "Batch Campaign Schedule" and shows a "Run Once" dialog box. The dialog box has two radio buttons: "Run now" (selected) and "Run later". The "Run later" option is accompanied by a date and time picker set to "03/7/2014" at "12:31 PM" in "PST" time zone. At the bottom of the dialog are "Run" and "Cancel" buttons. The background screenshot also shows a "Recurrence" section with the text "No repeating schedule has been set".

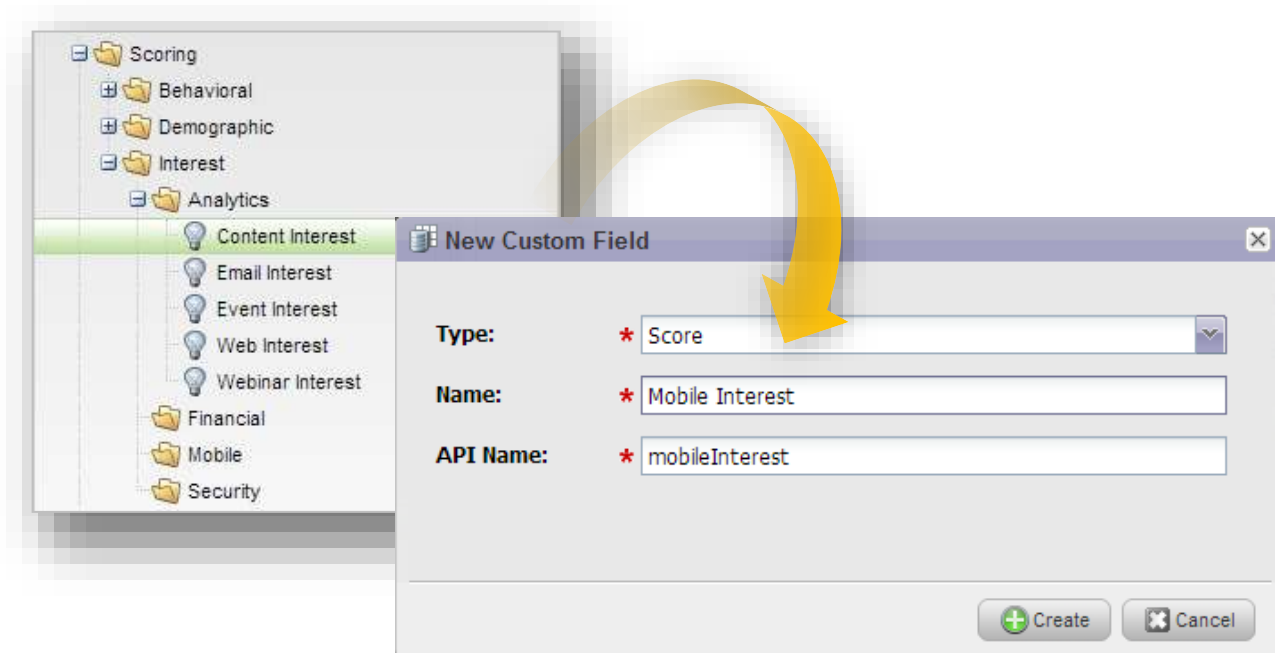
Appendix 3:

Marketo Screenshots for the Upload Interest Scores to Marketo job

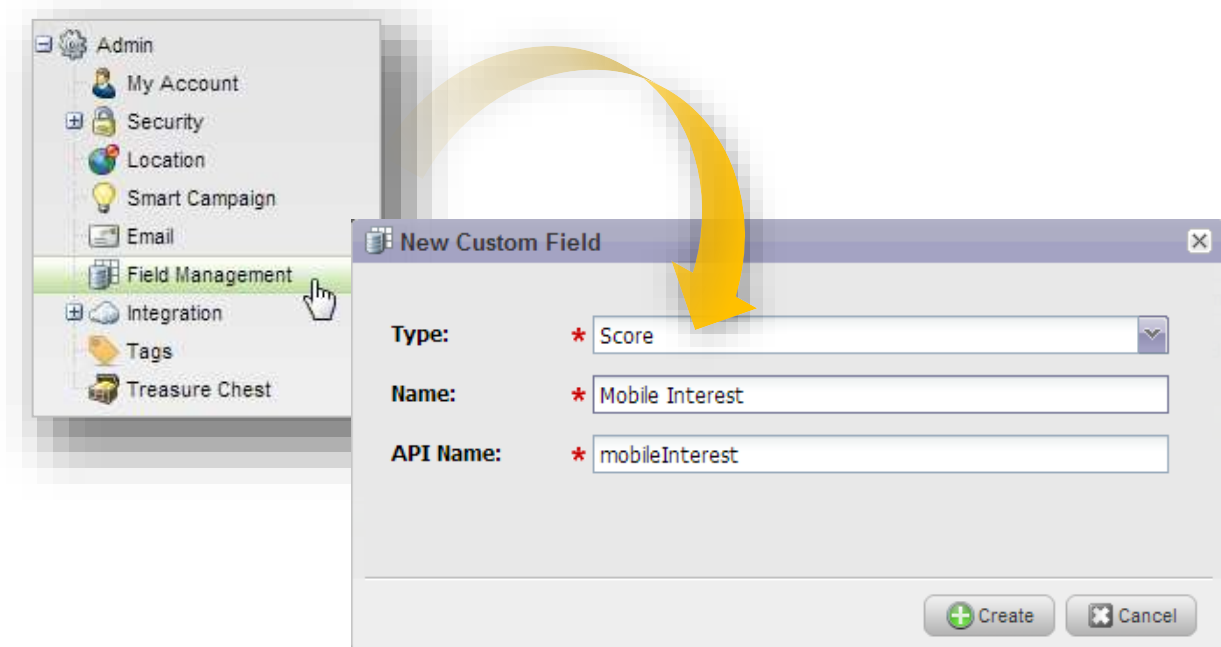
The **Upload Interest Metrics to Marketo** job is described on page 4. The screenshots below illustrate some of the Marketo side of that. They come from the more detailed guide devoted to that job: **Interest and Engagement Metrics with Certain and Marketo**.

1. Create Interest Score Fields

- Add product interest scoring fields and campaigns for each product/area of interest.

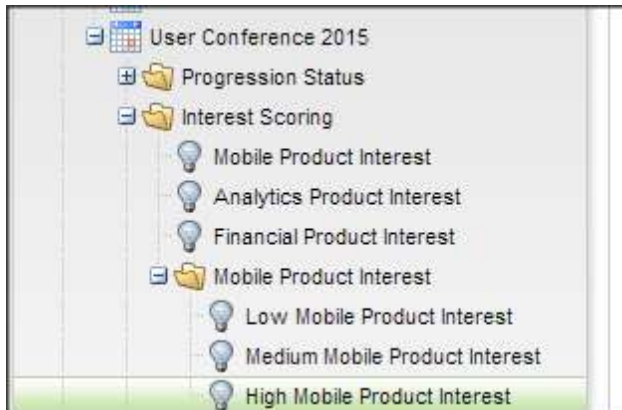


- Define as a “score” type field.



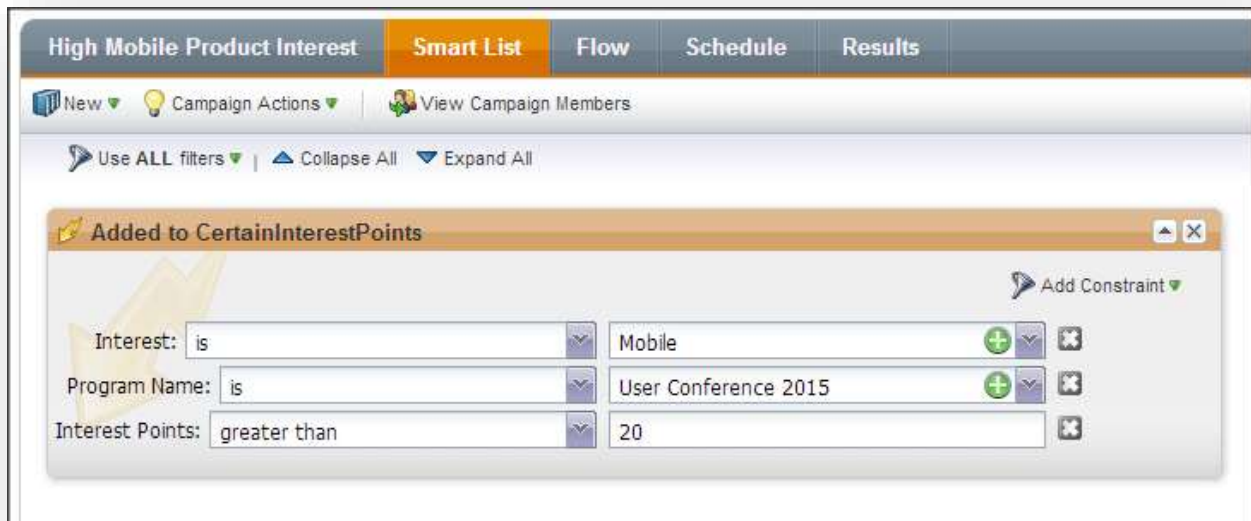
2. Create Event-Level Campaigns

Create interest scoring campaign under the event program in Marketo.



3. Define Campaign Smart List

- Define trigger or filter criteria in smart-list.
- Use range to define criteria (e.g. mobile interest score is greater than x).
- Must define program name.



4. Define Campaign Workflow

- Translate into Interest-score.
- Can also include any follow-up workflow steps.
- Repeat for additional interests.

