

Aktana for Marketo Engage - Integration Guide

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Marketo Integration Guide

Introduction

This guide describes how to integrate Marketo into Aktana.

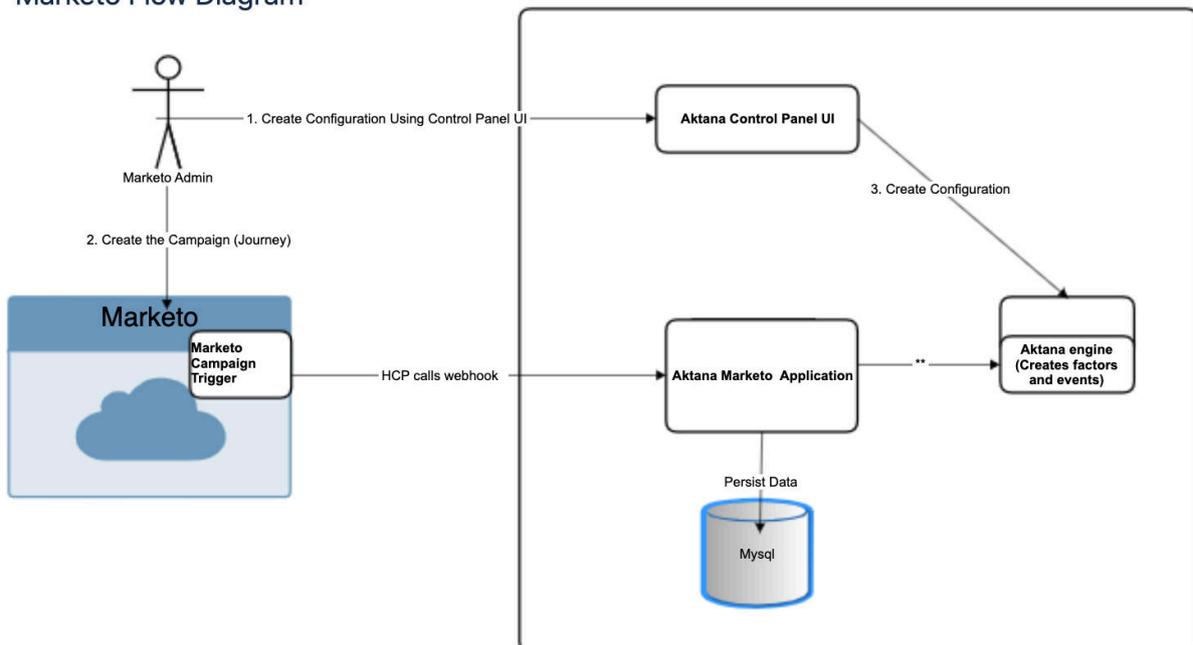
Marketo provides a way to configure custom webhooks which can be used for a specific campaign to generate Aktana suggestions and insights. This is done using the Smart Campaign feature provided by Marketo for each smart campaign; trigger events can be used to call a specific campaign flow. Within that flow, the Marketo administrator can configure a webhook for Aktana in Marketo's UI.

Once the campaign and Aktana webhook are created, the Marketo administrator can then execute the campaign. When the webhook is called, all the corresponding parameters are passed to the Aktana's Marketo application. The Aktana application then processes these inputs and generates the corresponding suggestions and insights.

The Marketo integration connects Aktana with Marketo providing the ability for the marketer to build their campaigns and smart campaigns with the **Aktana Activity** and **Aktana Entry** source within their Campaign Builder using Marketo's webhook functionality.

The following screen shot illustrates the workflow for integrating Marketo into Aktana.

Marketo Flow Diagram



** The invocation that the application will be making to the Aktana engine to create factors using templates and events

Integrating Marketo into Aktana

After you obtained the webhook URL from Aktana Services and created an SFDC account ID for Marketo, you can begin integrating Marketo into Aktana.

To integrate Marketo into Aktana:

1. **Create a configuration in the Control Panel (CP) in Aktana.**

The Marketo administrator signs in to the Aktana CP UI and creates the corresponding configurations with the products that are in the CP. The administrator defines the names for the configurations and the products that he has created and stores them.

2. **In the Marketo UI, the Marketo administrator:**

- Configures a Custom Activity for Aktana [5].
- Creates Aktana Webhooks [8].
- Creates a campaign in the **Smart List** tab.
For more information, see the Marketo documentation.
- Creates a Flow and Apply Aktana Webhooks [11].
- Creates a custom activity to publish data from Aktana to Marketo [12].

For more details, see [Triggering Insights and Campaigns in Aktana with Custom Activities](#) [5].

Before You Begin

- Contact Aktana Services and get the Aktana Webhook URL.
- [Create a SFDC Account ID Field for Marketo](#) [4].
- Select the **Marketo** persona in the Configuration Panel. For more information, see the Aktana Control Panel Guide.

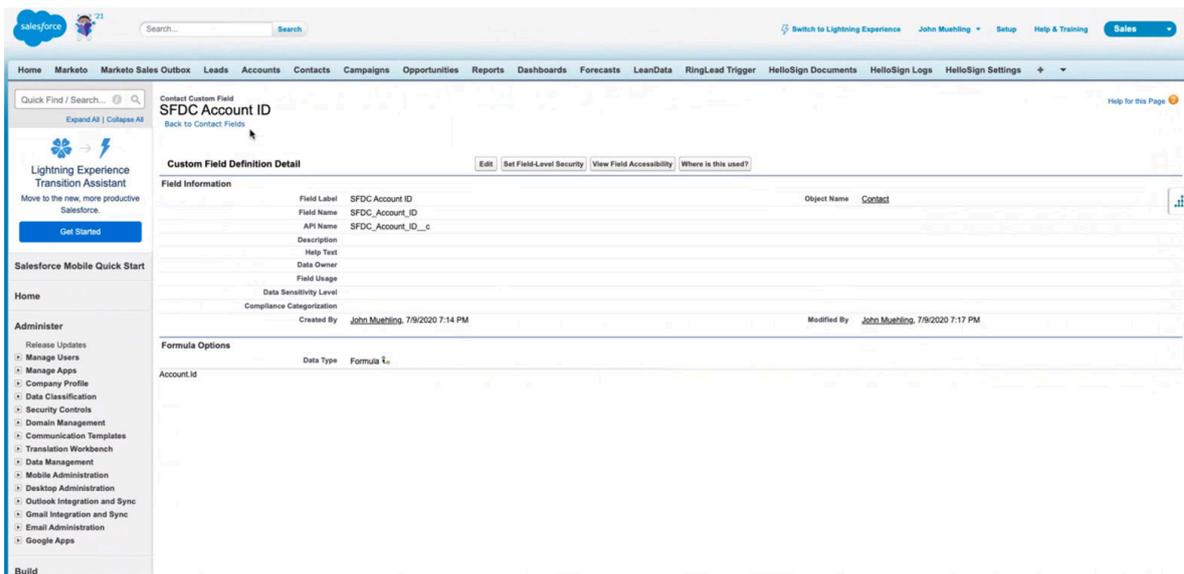
Creating a SFDC Account ID Field for Marketo

Before you begin, in Salesforce, the Marketo administrator must configure a synchronization between the Salesforce and Marketo with the feature provided by Marketo under Integrations in Marketo named Salesforce.

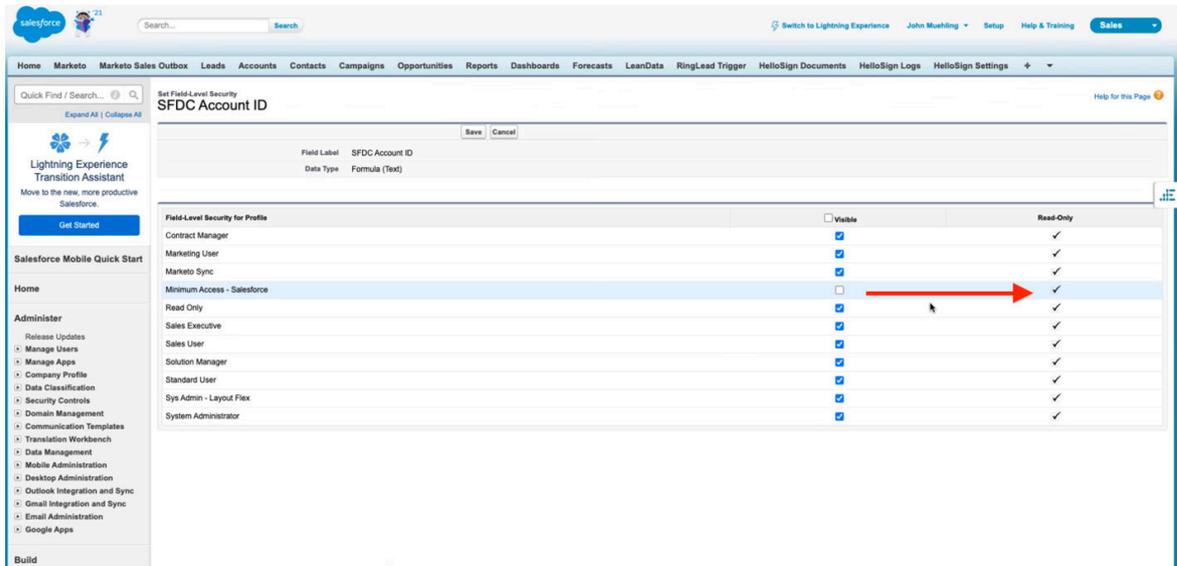
To get the account identifier of the lead that is present in Salesforce, create a custom field in Salesforce; for example, you can use **SFDC_ACCOUNT_ID_CUSTOM**; however, you can use any name in the **SFDC_ACCOUNT_ID** field in Salesforce. When the sync is performed between Salesforce and Marketo, the custom field is automatically populated in Marketo.

To create a SFDC account ID field in Marketo:

- In Salesforce, in the **Contact Record** section, create a contact custom field.



- Set the custom field to **SFDC_ACCOUNT_ID_CUSTOM**.
- In the **Formula Option** section, set the **Formula** field to copy the account ID to Marketo.
- Click the **Set Field-Level Security** tab.



- In the security field, **Minimum Access - Salesforce**, verify that the Marketo Sync user is set to **Read-Only** access.
This field automatically sync and maps this value (the HCP) to Marketo and is available to use with your contact records.

Triggering Insights & Campaigns

This section describes how to integrate with Marketo so that you can trigger insights and campaigns in Aktana using custom activities, custom services, and a webhook that you configure in Marketo. For an overview, see the [Introduction \[3\]](#).

To trigger insights and campaigns in Aktana:

- [Review the Before You Begin section \[4\]](#).
- [Create a Custom Service for Aktana in Marketo \[5\]](#).
- [Add a Custom Service to Generate a Security Token \[6\]](#).
- [Create a Aktana Webhook in Marketo \[8\]](#).
- [Create a Flow and Apply Aktana Webhooks \[11\]](#).
- [Create a Custom Activity to Publish Data from Aktana to Marketo \[12\]](#).

Step 1: Creating a Custom Service for Aktana in Marketo

To use Aktana webhooks, you'll need to create a custom service in Marketo by adding the following security parameters to a custom header in Marketo so that all your requests have this header.

- Content-Type** = application/json
- clientSecretKey**="MARKETO_CLIENT_SECRET_KEY"

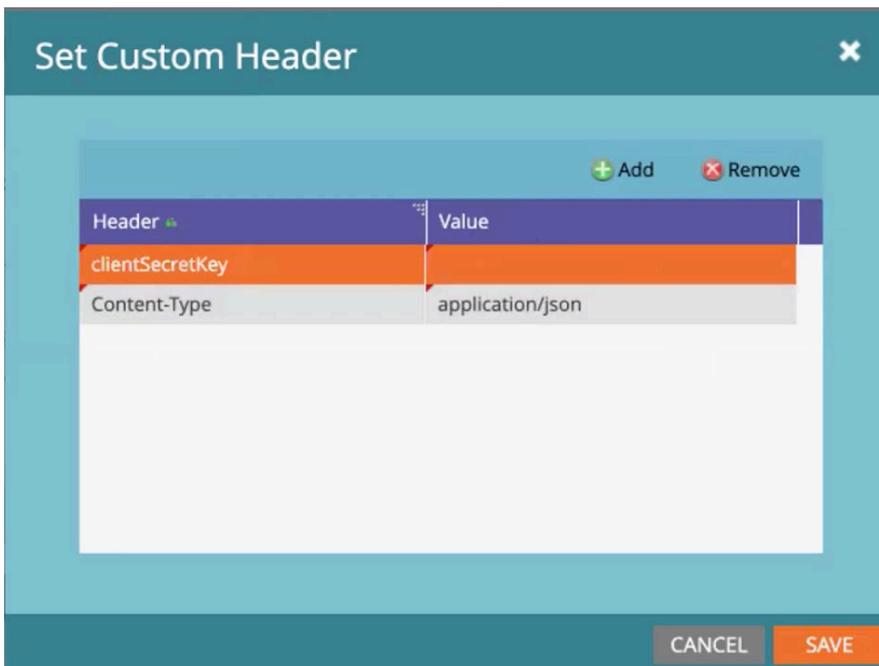


IMPORTANT

If you do not have a security token, generate a security token by adding a custom service in Marketo at the **LaunchedPoint > Installed Services > New Service** screen. For more information, see [Adding a Custom Service to Generate a Security Token \[6\]](#).

To configure a security token in Marketo:

1. Go to the **Webhooks > Webhook Actions > Set Custom Header** screen. The **Set Custom Header** screen is displayed.



2. Click the **+Add** icon to add the parameters to the custom header.
3. In the **Set Custom Header** screen, enter the **Content-Type** and **clientSecretKey** parameters into the new custom header.



NOTE

To get your existing security token in Marketo:

- a. Go to the **LaunchPoint > Installed Services** screen.
- b. Click the custom service that contains your security token.
- c. Click **View details** to view the client secret.
- d. Copy the client secret key.
- e. In the customer header, paste the client secret key in the **clientSecretKey** header **Value** field.

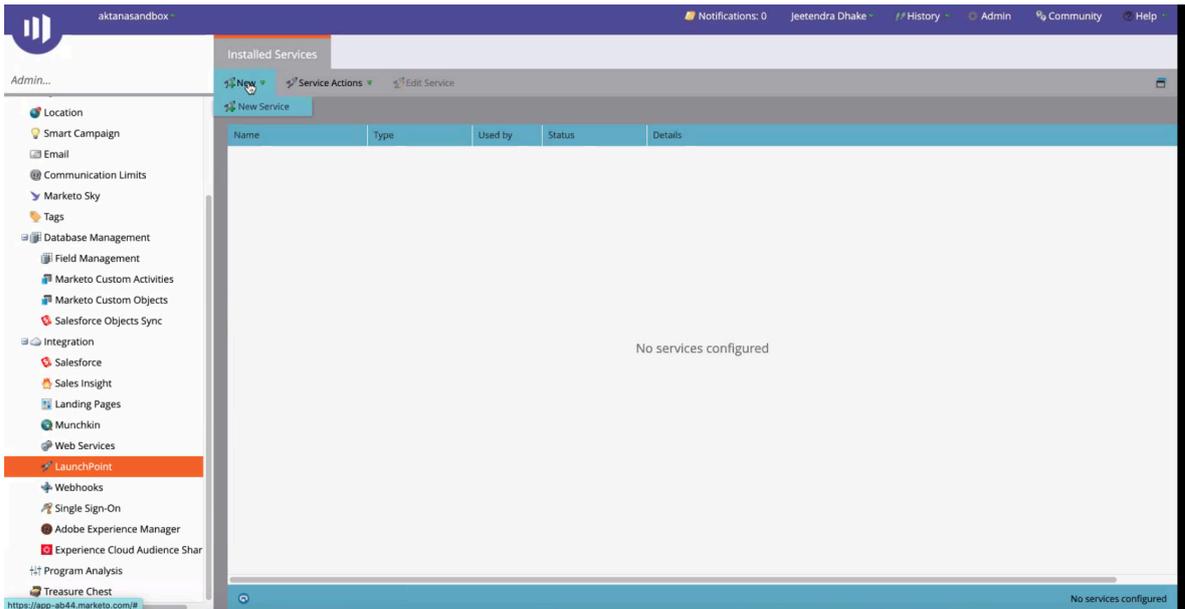
4. Click **Save**.

Step 2: Adding a Custom Service to Generate a Security Token

Before you begin, make sure you have a API user configured in Marketo in the **Users & Roles** screen.

To generate a token by adding a custom service:

1. With administrator access, go to the **LaunchedPoint > Installed Services > New > New Service** screen.



The **News Service** screen is displayed.

2. In the **Displayed Name**, enter **Aktana-Integration**.
3. In **Service**, select **Custom**.
4. In the **Description**, enter **Aktana-Integration**.
5. In **Only API User**, select the configured API user.
Note: The API user is configured in the **Users & Roles** screen.
6. Click **CREATE**.

**NOTE**

Once the service is created, a ClientId and ClientSecret is generated.

Share this information with Aktana.

Step 3: Creating a Aktana Webhook in Marketo

Aktana integrates with Marketo using the webhooks provided by Marketo. Marketo enables marketing teams to execute campaigns. Each campaign is triggered when a new user is added to the list for which the campaign is executed.

Once Marketo triggers the campaign for the leads with a configured Aktana webhook, Aktana gets a call with the activity details (configuration name, products, suggestions, and expiration days). Aktana uses this data to create factors and events in Aktana's Engine, which generate suggestions.

When the campaign executes, that Aktana webhook is called and sends a request to the Aktana Marketo application, which generates the corresponding factors (depending on the customer Salesforce data) in the Aktana Engine.

For a list of Aktana webhook parameters to configure, see [Aktana Webhook Parameters](#). [9]

To create and use a Aktana webhook in Marketo:

1. Login in to Marketo and go to the **Webhook > Webhooks > New Webhook** screen.

2. In the **Webhook Name**, enter the name of your webhook.
3. In the **Description**, enter a description of the webhook.
4. In the **URL** field:

**IMPORTANT**

Contact Aktana Services to get the Aktana webhook URL.

- In **Request Type**, select **POST**.
- In the **Template** field, insert the the following Aktana template tokens in JSON format and modify the tokens.

These values are created as tokens in the Marketo's campaign folder or Marketo program, which the campaign is part of.



NOTE

For a guide to modifying these tokens and using the TracerId feature, see [Aktana Webhook Template Tokens \[10\]](#) and [TracerId \[11\]](#).

```
{
  "activityName": "AKTANA_ACTIVITY_NAME",
  "suggestion": "AKTANA_SUGGESTION_DETAILS",
  "repActionType": "AKTANA_REP_ACTION_TYPE",
  "expireDays": "5",
  "aktanaConfigName": "AKTANA_CONFIG_NAME",
  "products": [AKTANA_PRODUCTS_LIST],
  "tracerId": "MAS_TRACER_ID"
}
```

- In **Request Token Encoding**:, select **JSON**.
- In **Response type**: select **JSON**.

The screenshot shows the 'Edit Webhook' configuration interface. The fields are as follows:

- Webhook Name:** Aktana-Test
- Description:** (empty)
- URL:** `http://localhost:8080/api/generateSuggestions?mcOrganizationId={{system.munchkinId}}&campaignId={{campaign.id}}&campaignName={{campaign.name}}&sfidCid={{lead.SFDC Id}}&emailAddress={{Lead.Email Address}}&leadId={{Lead.Id}}`
- Request Type:** POST
- Template:** `{"activityName":"AKTANA_ACTIVITY_NAME", "suggestion":"AKTANA_SUGGESTION_DETAILS", "repActionType":"AKTANA_REP_ACTION_TYPE", "expireDays": "5"}`
- Request Token Encoding:** JSON
- Response type:** JSON

- Click **Save**.
- Configure additional Aktana webhooks if required.
- Next Steps:** [Creating a Flow and Applying Aktana Webhooks \[11\]](#).

Aktana Webhook Parameters

The following table lists the parameters you configure for Aktana webhooks.

Table 1. Aktana Webhook Parameters and Definitions

Parameter	Token	Description
sfdcID	{{Lead.SFDC_AC-COUNT_ID_CUSTOM}}	The Salesforce account number associated with the lead. This is a custom field in Marketo that is populated when a synchronization is performed between Marketo and Salesforce. This is the Salesforce ID. For information, see Creating a SFDC Account Custom Field in Salesforce [4] .
mcOrganizationId	{{system.munchkinId}}	The organization identifier.
emailAddress	{{Lead.Email Address}}	The email address associated to the user/rep, which is fed to the campaign.
leadId	leadId	The Lead Account ID associated to the user/rep, which is fed to the campaign.
campaignId	campaignId	The campaign identifier.
campaignName	{{campaign.name}}	The campaign name.

Aktana Webhook Template Tokens

This section lists the Aktana template tokens that you pass in the configuration in a JSON request in the Aktana webhook.

JSON Example

```

}

"activityName": "AKTANA_ACTIVITY_NAME" ,

"suggestion": "AKTANA_SUGGESTION_DETAILS" ,

"repActionType": "AKTANA_REP_ACTION_TYPE" ,

"expireDays": "5" ,

"aktanaConfigName": "AKTANA_CONFIG_NAME" ,

"products": [AKTANA_PRODUCTS_LIST] ,

"tracerId": "MAS_TRACER_ID"

}

```

The following Aktana webhook template tokens table lists the values that you must change for the tokens for all Aktana webhooks.

These values are created as a token in the Marketo's campaign folder or Marketo's program.

In the **Template** fields, insert and modify the following Aktana template tokens in JSON format:

Table 2. Aktana Webhook Template Tokens

Webhook Aktana Token	Description of Token Value
activityName	Update this field to be a Unique Activity Name across all the webhooks.
suggestion	Enter the suggestion and details that you want to generate for the event for each lead when the campaign is triggered.
repActionType	Enter the RepAction type.
expireDays	Enter the number of days the suggestion is valid.
aktanaConfigName	Enter the configuration name that this event is going to generate the suggestion using. Note: You get this name from Aktana in Portal > Control Panel > CONFIG screen.

Webhook Aktana Token	Description of Token Value
products	Enter the products for which the event will be generated. Note: You get this name from Aktana in the Portal > Control Panel > CONFIG screen.

TracerId in Marketo

The following JSON request and TracerID Tokens table shows the **optional** JSON fields that you can pass in the configuration to use the TracerId functionality in Marketo.

JSON example

```
{
  "activityName": "AKTANA_ACTIVITY_NAME",
  "suggestion": "AKTANA_SUGGESTION_DETAILS",
  "repActionType": "AKTANA_REP_ACTION_TYPE",
  "expireDays": "5",
  "aktanaConfigName": "AKTANA_CONFIG_NAME",
  "products": [AKTANA_PRODUCTS_LIST],
  "masJourneyTagParamName": "JOURNEY_TAG_PARAM_NAME",
  "masJourneyTagParamId": "JOURNEY_TAG_PARAM_ID",
  "masJourneyTagParamDisplayLabel": "JOURNEY_TAG_PARAM_DISPLAY_NAME",
  "masActivityTagParamName": "ACTIVITY_TAG_PARAM_NAME",
  "masActivityTagParamId": "ACTIVITY_TAG_PARAM_ID",
  "masActivityTagParamDisplayLabel": "ACTIVITY_TAG_PARAM_DISPLAY_NAME",
}
```

Table 3. TracerId Tokens

Optional Token	Description
masJourneyTagParamName	The Journey tag name.
masJourneyTagParamId	The Journey tag Id.
masJourneyTagParamDisplayLabel	The Journey tag display name.
masActivityTagParamName	The Activity Tag Name.
masActivityTagParamId	The Activity tag Id.
masActivityTagParamDisplayLabel	The Activity tag display name.

Step 4: Creating a Flow and Applying Aktana Webhooks

After you have created your [Aktana webhooks in Marketo \[8\]](#) and [custom service \[5\]](#), create a flow and apply the Aktana webhooks to that flow in Marketo on the **Flow** tab.

The following screen shot illustrates a typical flow in Marketo.

The screenshot displays the 'Flow' editor interface with the following steps:

- 1 - Call Webhook:** Webhook: Aktana-Test-Step1
- 2 - Send Email:** Email: Select email...
- 3 - Call Webhook:** Webhook: Select...
- 4 - Wait:** Duration: 1 hour, 2 days, 3 weeks...
- 5 - Send Alert:** Email: Select email...; Send To: Sales Owner; To Other Emails: Enter email...
- 6 - Call Webhook:** Webhook: Aktana-Test-Step-2

Step 5: Creating a Custom Activity to Publish Data from Aktana to Marketo

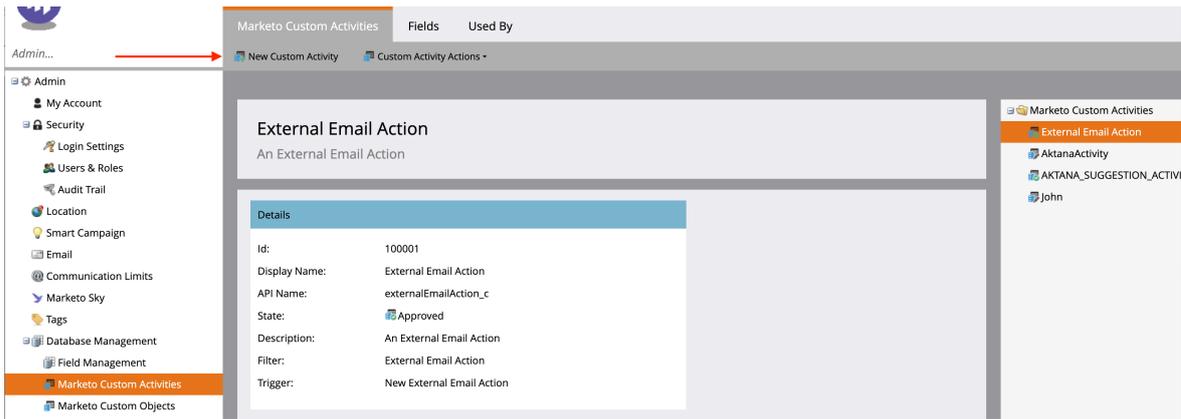
This section describes how to create a custom activity to publish data (suggestions and insights) from Aktana to Marketo using the a custom activity, **AKTANA_SUGGESTION_ACTIVITY** in Marketo. Aktana uses its REST APIs to communicate and update this activity in Marketo.

The messages generated are associated with an email address. Using a REST call, Aktana picks the email address, which is unique, and executes a REST call onto Marketo to get the ID of the specific lead in the campaign.

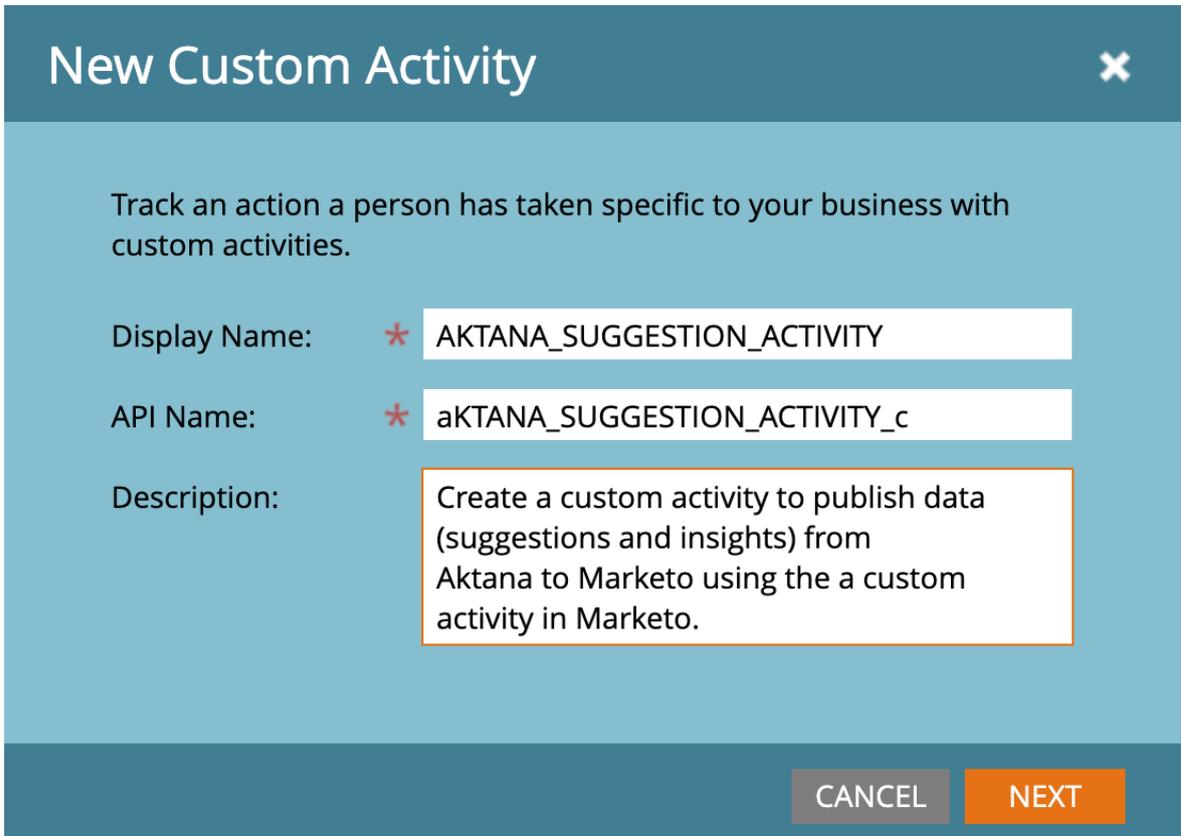
Once Aktana gets that ID, when Aktana creates the custom activity for this lead, Aktana specifies this ID as one of the parameters.

To create a custom activity to publish data from Aktana to Marketo:

1. In Marketo, navigate to the **Marketo Custom Activity** screen and click the New Custom Activity at the top left of the screen.



2. Create a new custom activity using the following naming convention for the display name: **AKTANA_SUGGESTION_ACTIVITY**.



3. Define your custom activity filter and trigger by entering: **ACTIVITIES** in the **Filter** field and **ACTIVITY** in the **Trigger** field, then click **NEXT**.

New Custom Activity ✕

Define how your custom activity's filter and trigger will be displayed.

Filter: *

Trigger: *

NOTE: Filters are past tense and triggers are present tense.

4. Create the primary field. In the **Name** and **API Name** field, define your customary activities primary field by entering **id** in both fields, then click **SUBMIT**.

New Custom Activity ✕

Define your custom activity's primary field.

Data Type:

Name: *

API Name: *

Description:

5. Click the **Fields** tab and then **New** field.

6. For your primary field, **id**, create the following **6** fields shown in the following screen shot. *Jeethendra will provide table that provides a brief description of each field, what each field points to, what is the main object.*



NOTE

Note except for **email**, the data type for 5 the other fields is **string**. For email, set the data type to **email**.

Name	API Name	Description	Data Type
* id	id		string
contactKey	contactKey		string
eventDefinitionKey	eventDefinitionKey		string
establishContactKey	establishContactKey		string
accountid	accountid		string
masAccountListName	masAccountListName		string
emailAddress	emailAddress		email

Here is an example for creating the new field titled **contractkey** with the data type, **string**, and API name, **contractkey**.

New Field

Data Type: * string

Name: * contractkey

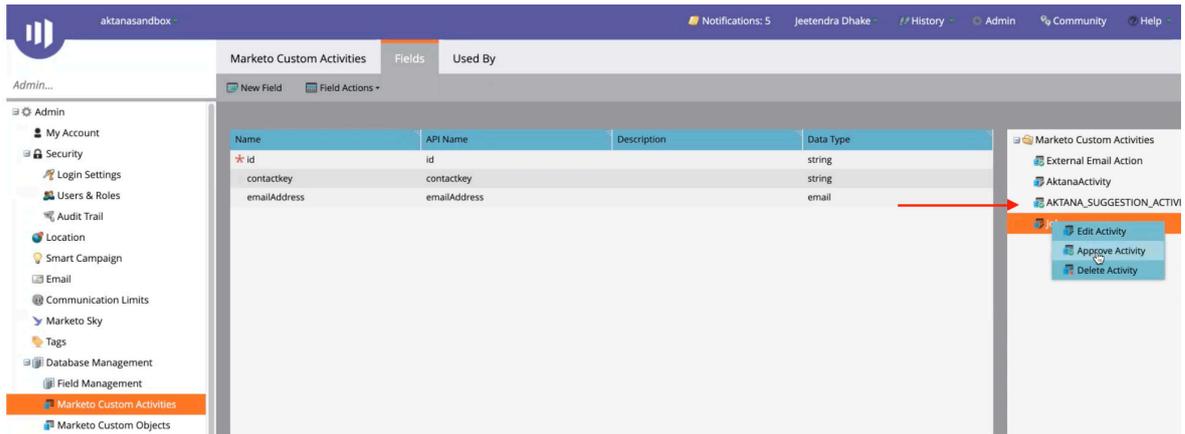
API Name: * contractkey

Description: ex. The name of the product that is purchased.

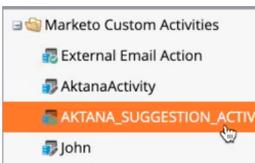
Primary Field

CANCEL SAVE

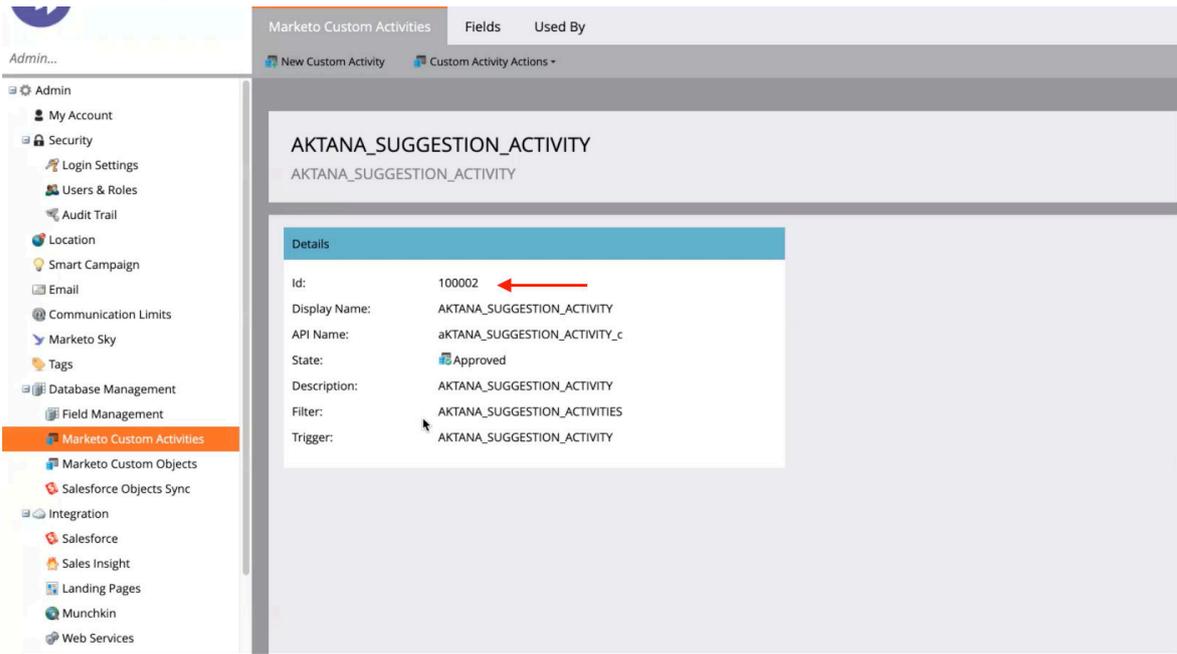
7. After you created all 6 new fields for the **id** primary field, select the new custom activity, **AKTANA_SUGGESTION_ACTIVITY**.
8. Right click it and then select **Approve Activity**.



- To view and verify the details of this custom activity that you just created, click **AKTANA_SUGGESTION_ACTIVITY** at the right of screen.



The **Details** screen is displayed. The ID, **100002**, is one of the parameters for updating and creating the activity for a specific lead.



Common Scenario

This section describes a common scenario for the Marketo Integration: a targeted email campaign. In this scenario, the marketing department cannot reach out to its HCPs because it doesn't have consent. Using Aktana and Marketo, you can set up a campaign to send a suggestion to the sales rep to reach out to the HCP to get their consent so marketing can send information.

After the sales rep gets consent, the marketing team can create a new email campaign to reach out to the HCP. Marketing lets the sales reps know through the integration (via a Aktana suggestion) that they can now reach out to the HCP about this campaign and to follow up with the HCP.

The following illustration describes this scenario.

Use Case - Targeted Email Campaign

#1
Consent

Marketing cannot send targeted email to HCP due to lack of consent.



Sales receives a suggestion to contact HCP to request email consent



Sales reaches out to HCP. Response recorded and relayed back to Marketo Automation (MA) application

#2
Outreach

Marketing sends HCP targeted email.



Sales receives a suggestion to follow up with HCP to reinforce message.



Sales reaches out to HCP. Acceptance/Dismissal recorded and relayed back to MA application

Theme: Sales helping to open up communication channels for Marketing
Sales following up on targeted emails