Marketo Engage Cloudwords Integration

Before You Start Marketo Engage:

You need to take care of a few things before starting your first Marketo Engage project in Cloudwords. This includes enabling Cloudwords for Marketo Engage integration, implementing recommended best practices and configuration tips, and structuring Marketo for localization.

Marketo Engage API Information needed:

Client ID Launchpoint

Client Secret Launchpoint

Identity URL Webservices Rest API

Endpoint URL Webservices REST API

Username provided ← Marketo User

Password provided ← Marketo User

Launchpoint: Provides Client ID / Client Secret

WebServices REST API: Endpoint and Identity URL

Within Marketo Engage, please provide the following access:

- View, edit, cloning, design studio, Marketing activities access, and database -> segmentation, access to all workspaces.
  - API use and the Marketo User, because they need to use 2 separate accounts for the Marketo Engage integration

Enabling the Cloudwords for Marketo Engage integration

If your account has not yet been enabled, email us at support@cloudwords.comto request activation.

Once your Cloudwords account has been granted access to the Marketo Engage integration, follow these instructions. Note: You must be an Administrator in Cloudwords in order to access the settings and configuration steps.

1. Log in to your Cloudwords account, click your name in the top right corner, and click **More**. The **Settings** page displays.
2. Select **Marketo Engage Integration** from the list.
3. Click **Start Now** to enable the integration for your account. Note: This is a one-time action.
4. Under the **Enable the Marketo Engage Integration?** header, select the Yes option to make the integration available to users who've been granted permission to use it.
5. You can manage Marketo access for other users under the **Permission to Use the Marketo Engage Integration** header, and change Advanced Settings as well.

1. Click **Save** when you're done.

Structure Marketo Engage for localization

First evaluate the structure of your original assets (email, landing page, et cetera) and determine how well it will scale to your translation needs. When you set up a translation project in

Cloudwords, you'll decide how you want the translations delivered -- you can choose between New Asset, New Program, or Dynamic Content.

- For New Asset, the translated asset has the same name as the source, appended with language code.
- With New Program, all translatable assets are created in a cloned Marketo Engage program with the identical structure as the source program.
- For Dynamic Content, you set up a preconfigured content segmentation to allow for greater flexibility.

Before you start, consider these tips:

- Make sure all translatable content is editable and doesn't reside in templates.
- For dynamic content, make sure that all desired elements are segmented.
- The component names should be unique in each asset.

Configuration tips

To get the most out of Cloudwords, we recommend you spend some time configuring it. For example, consider these tips that are required for certain functionalities:

- For Dynamic Content projects, be sure that all text elements are segmented. Static elements will not be included in Dynamic Content projects.
- Mixed project types must be submitted separately or as a campaign. If you're combining dynamic emails and static landing pages, for example, these need to be submitted as independent projects. You can group them together under a Cloudwords Campaign.
- Make sure that the assets you select are not already in translation, as Cloudwords prevents such source-file conflicts.

Best practices

Here are optional suggestions to make your projects easier to manage.

- Customize the target and source language list boxes to contain your company's specific target and source languages (Go to **Settings** > **Project Settings**).
- Embedded snippets and forms: these will be included by default, but you can choose to exclude them from an individual project request. There is a checkbox in the project creation wizard that lets you determine whether to include these elements.
- If you work with a translation vendor that is not in the Cloudwords marketplace (see the "Vendors" tab in your Cloudwords account), send us an email at customersuccess@cloudwords.com, and we will add them to Cloudwords.
- Add your translation Reviewers. (Go to **Settings** > **User Management**). Note: User roles are only available in Accounts when using the Professional or Enterprise Edition.

- To help with project management, you can set up Departments (Go to **Settings** > **More** > **Company Departments**). You'll be able to run reports company wide or by department. Note: Departments are only available in Accounts when using the Professional or Enterprise Edition.
- If you would like vendors to accept your company's non-disclosure agreement (NDA) before they can download your source files or translation memory, add the NDA at **Settings** > **More** > **NDA**. Note: A custom NDA is only available in Accounts under the Professional or Enterprise Edition. Basic accounts inherit the NDA that is in place between Cloudwords and all the vendors in the marketplace.

What can Cloudwords extract for translation?

The following asset elements can be extracted and sent for translation.

- HTML text
- Body copy
- Tokens (all tokens by default, but we can configure your account to avoid inherited tokens)
- Snippets
- CTA Button Text
- Forms and form buttons
- URLs in hyperlinks

What isn't sent for translation?

The following elements are not sent for translation.

- Images
- Documents stored in Marketo Engage (e.g., white papers, et cetera). These can be downloaded and sent as a separate CW project.
- Content in templates
- Social widgets (built in Marketo Engage)

Starting your first Marketo Engage Project:

This section is intended for Marketo Engage users who are new to the Cloudwords experience. In this document, you'll learn how to start a basic project, how to manage and track its progress in the dashboard, and then how to review the translated content and finalize your project.

Start a new project

1. Navigate to <URL> and click **Start New...**.
2. Select **Start New Project**. The **Create Your New Project** page displays.

3. Fill in the fields:
    Project Name (required) - type the name of your project
    Department (required) - select from the dropdown menu
    Intended Use (required) - select from the dropdown menu
    Campaign - select from the dropdown menu
    Project description (optional) - type a description
    Priority - select from the dropdown menu
    Tags (optional) - select from the existing list or add new tags
4. Click **Next**. The **Source Materials for <project name>** displays.

Select source materials

Next, it's time to locate the source materials you want translated.

1. Click the **Marketo Engage** box to select a content source from the page list. The content assets may require a few moments to load. Source materials display the list of currently configured integrations.

    Note: If **Marketo Engage** is not listed here, you may need to enable the Cloudwords for Marketo Engage integration before you can start a project.

2. Select one of three (3) delivery options for your materials:

    New Asset - Each Marketo Engage asset selected will get a new translated copy per language.
    New Program - Each Marketo Engage program selected will get a new translated program per language. For example, if the French language is selected then a new program is created in French.
    Dynamic Content - Translations will be delivered in the pre-configured dynamic content segment per language.

    Note: Cloudwords names every asset according to the original name, appending it with the target language and a file counter. For example, "Project X" in French becomes "Project X (fr-1)." The counter exists to handle multiple translations. For naming dynamic content, you first have to configure the rules in Marketo Engage before connecting each rule to a language in the Cloudwords environment.

3. Clicking either of the delivery options will present you with a folder list view of all Marketo Engage source materials - a hierarchy list. You can toggle between two tabs: Marketing Activities and Design Studio.

    Note: In Marketo Engage, landing pages and emails are stored under Marketing Activities, and Design Studio contains dependencies such as forms and snippets. Only those users with permissions for these sections will see both tabs.

4. From the folder list, click to select the source files you want to send for translation. Once you've selected your files, they will display in the Asset Selection list on the right-hand side of the page. Click **Continue**. The Language Selection page displays.
5. Select the source language from the dropdown menu.
6. Next, select the target language from the dropdown menu. If you have multiple target languages, simply select them one at a time from the dropdown menu.

    Note: Click **Add +** to add target languages separately for any individual source file.

7. If you have any Marketo Engage snippets or forms that are embedded within an email or landing page, click to mark the checkbox under **Include Embedded Snippets and Forms**. (This checkbox is marked by default.)
8. Click **Reference Materials** to display any existing project reference materials, such as glossary, style guide, and translation memory. These reference materials are for the benefit of of the translation vendor, but are also available to anyone who has access to your project.
9. Click **Upload** to select any reference files you want to upload and add to the project. The **Upload Reference Material** pop-up box displays.
10. You can either drag and drop any files or click to choose files.
11. Click **Upload**. If you have additional files, simply click Add Another File to upload it.
12. Once you're done, click **Close**. The reference files you uploaded are displayed under the **Project Reference Materials** header.

    Note: You can add, delete, download, or replace any reference files at any time.

13. Click **Next**. The **Translation Request for <project name>** displays.

How would you like the Marketo translations delivered?

New Asset	New Program	Dynamic Content
Each Marketo asset selected will get a new translated copy per language.	Each Marketo program selected will get a new translated copy per language.	Translations will be delivered in the pre-configured dynamic content segment per language.

Source Materials for MarketoREST

What content do you need translated? (click on an option below to select)

Local Files	MarketoREST

Select a Vendor

The next step involves selecting a translation vendor for your project. You can make this process faster by selecting preferred vendors if your organization has done business with them in the past, they were recommended to you, or if you found them in the vendors directory at Cloudwords.

Vendors to Request Quotes From

Select up to 5 of your preferred vendors (click on a vendor to select or deselect)

MakVendor

Include vendors chosen by Cloudwords? ⓘ

☑ Let Cloudwords choose **5** vendors for me.

1. Select up to 5 preferred translation vendors from the list. Simply click on a vendor to select or deselect.
2. If you want to allow Cloudwords to choose any qualified vendors on your behalf, click to mark the checkbox for **Let Cloudwords choose \<x\> vendors for me** under the header **Include vendors chosen by Cloudwords**. (Total limit: 5 vendors per project.)

3. Next, look under the **Deadline for Vendors** header and enter the dates and times for your bid and translation deadlines. Consult your project milestones to select deadlines that the vendor can realistically meet.

Deadline for Vendors

Vendors must submit bids by ⊘ *

| Wednesday, November 16, | 5pm ▾ |

I need initial translation by ⊘ *

| Wednesday, November 30, | 5pm ▾ |

You will have to select the bid by ⊘
🛈 Sunday, November 20, 2016 at 5am

1. If you wish to receive quotes ASAP, select the earliest date allowed in the fields for **Vendors must submit bids by**. These fields indicate the deadline for Bid Submission.
2. For the fields of **I need initial translation by**, this indicates the date / time of when you want to receive the translated material for the first time.
3. **Note**: Cloudwords automatically calculates the **Bid Selection Date.** It is assumed that you will then review the deliverable and possibly request changes to be made by the vendor. Thus, the date you enter here in the "First Translation Deadline" should be a sufficient time before the date by which you require the translation project to be completely done, reviewed, updated, and finalized.

Project Currency

U.S. dollars ▾

U.S. dollars
Euro
Pounds sterling
Japanese yen
Renminbi
Brazilian reais
South Korean won
Argentine pesos
Singapore dollars
Hong Kong dollars

1. Enter a currency that you wish to accept for the project from the dropdown menu under **Project Currency**.

2. (Optional) If you have a purchase order number to reference to your project, you can enter or select it from the **Purchase Order Number** dropdown menu.
3. Enter any additional information in the text field under **Notes and Instructions for Vendors**. Click **Next**.

Project Workflow

After selecting a translation vendor, the **Workflow & Followers for <project name>** page displays. Here, you can choose a workflow for your project as well as designate project followers.

1. Click to select a workflow name and read its description. For simplicity's sake, this documentation describes the Basic 1-Step Workflow, selected by default. Click **Select Workflow**.

   Note: The **Basic 1-Step Workflow** consists of Vendor Work, followed by an internal Final Review.

2. Next, the **Set Up Dates & Assignees for Basic 1-Step Workflow** header displays. Here, you can choose to use one review due date and automatically assign reviewers, or set review due dates and reviewers for each language. Optional: select a different deadline date for completing the final review of translated materials..
3. If you want to add any colleagues as project followers, click **Add** under the Project followers header and select people from the list.
4. Click **Finish and Request Bids**.
5. Click **Accept** to immediately request quotes from the vendor(s) you selected. The **Project <project name> Submitted** confirmation page displays.

At this point, you only have to wait for the translation vendor(s) to accept your request. You can visit your project page to modify your project or, if you have a similar project, click **Clone Project** to create another one based on the project you just created.
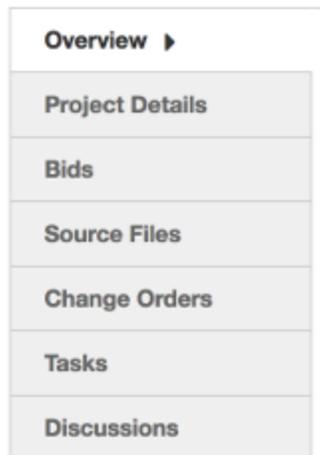
Manage Your Project

From the confirmation page, you can click **View your project** to visit the project dashboard. Everything you need to track and manage your project is available on the dashboard: information about owner, content source, due date, translation status, activity feed, and more.

On the left-hand side, you can click any of the vertical tabs to drill down for project details, bid information, source files, change orders, tasks, and discussions.

Check Language Status

Click the **Overview** tab to see your project's language status. Each language is listed, and you'll be able to see as soon as the vendor delivers the source files for your review. Cloudwords will also notify you via email when the vendor has finished. Once the files are delivered, the Project Status as well as the Language Status changes to **In Review**.
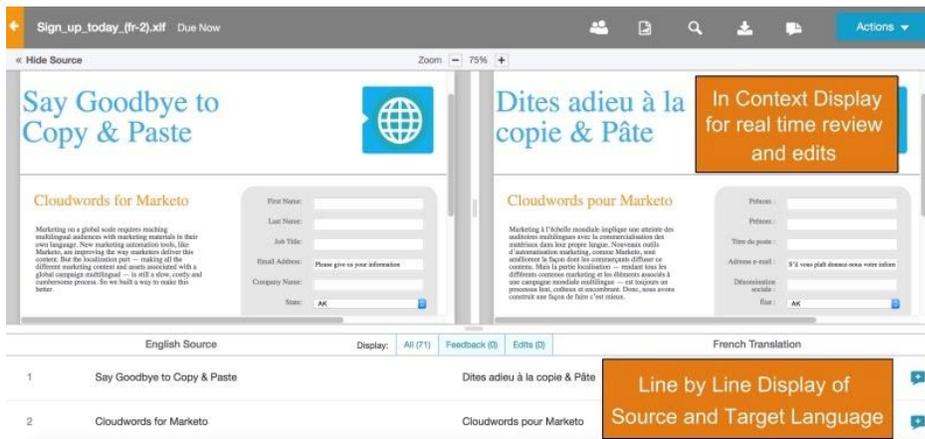
Review the Translated Files

Once the vendor returns the translated files and your project status changes to **In Review**, you can immediately begin reviewing the files in Cloudwords OneReview.

You can review the translations directly in Cloudwords, in real-time.

1. To review, click a language from the **Overview** page to start reviewing directly on-screen. The **<<Language>> Workspace** page displays.
2. Select a file (extension .xlf) and click **Review**. The OneReview workspace displays.
3. You are now viewing a faithful WYSIWYG representation of your source files, as translated. Click on any content element to select it and review it.

4. To edit a translated text element, click on it and select **Edit Translation**. The bottom of the page will display the source file side-by-side with the translated file, allowing you to edit any text string.
5. If you want to provide the vendor with specific feedback, click on a translated text element and select **Provide Feedback**. You can then type any notes in the dialog box, select a Severity classification from the dropdown menu and a Category classification from another dropdown menu, and then click **Submit** to send the feedback directly to the vendor.
6. Once you have reviewed the file, click **Submit Review**. The Submit Review dialog box displays for confirmation.
7. If you are satisfied with the review, click **Submit**. A confirmation message appears at the top of the page, and the file status in the workspace then automatically changes to **Approved**. Repeat as necessary until all files have been reviewed.
8. Congratulations! The language files have now been approved and automatically sent to the Marketo Engage servers.
9. At this point, you can download the approved files if you wish, or view them on-screen.
10. The translation memory is automatically uploaded to the project dashboard, once all files have been reviewed and approved.
11. In the Cloudwords dashboard, the project status changes to **Project Closed**. You're now officially done.

Project Completion

Once your translated project files have been reviewed and approved, Marketo Engage is automatically updated with the approved translations. You can review the dashboard for any notifications or action items.

Marketo

Department: Admin | Owner: Nina MakCust | Content Source: Marketo | Due: 10/28/16 Edit

Project Status
Project Closed

Overview ▶

Project Details

Bids

Source Files

Change Orders

Tasks

Discussions

Language Status	Download translated files ->
Finnish	Approved (1)
French	Approved (1)

Browse in Cloudwords OneTM
or Download the TMX file

Translation Memory	Last Updated	
Marketo-tmx.zip ⓘ	10/25/16	**Browse TM	Download**