

How to configure Marketo for Fuel Cycle

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How Does It Work?

Sync your customer data seamlessly between Marketo and Fuel Cycle in a few simple steps. You can choose to push data from Marketo to Fuel Cycle and pull Fuel Cycle profile map data into Marketo. Once setup, the data is synced every 24 hours.

Push Data

When push data is enabled, an additional option will be available in Profile Maps for “Push to CRMs.” All profile maps set to Push to CRMs will be pushed to a Custom Object you create called “FC_IMPORT.” The data can be synced to users in Marketo based on matching email address.

Pull Data

When pull data is enabled, any Marketo data added to the Custom Object “FC_EXPORT” will be pulled into Fuel Cycle where it will be synced to members based on matching email address. The data can be used as a source in profile maps where they can then be added to member exports and used for segmentation in dynamic groups.

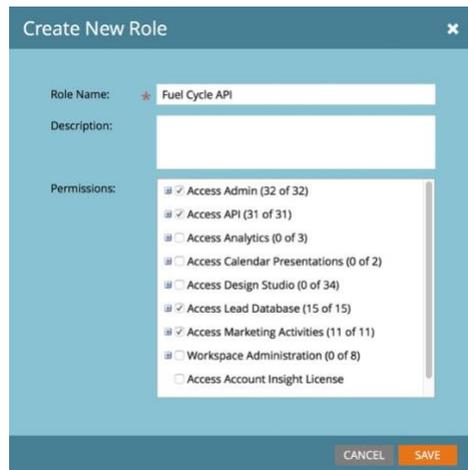
Please Note: We are only able to match users based on email address at this time. If you have users inside Marketo without an email address, we cannot match those users inside Fuel Cycle.

Marketo Configuration Steps

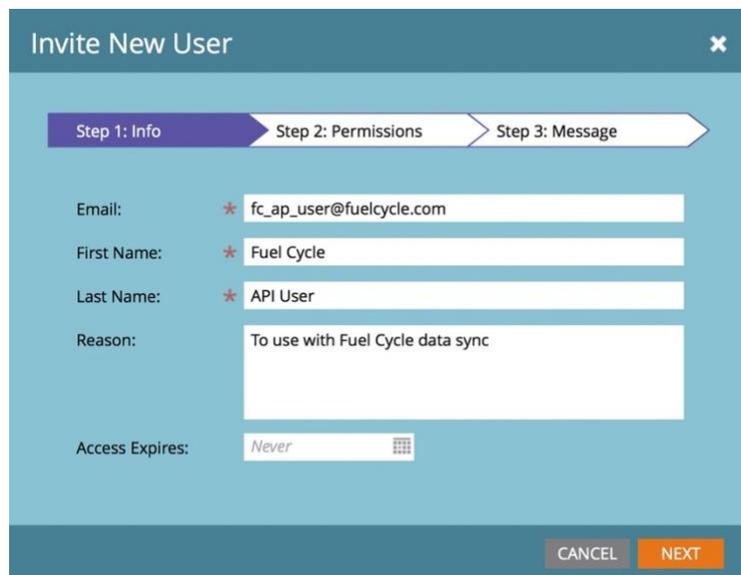
The following steps are done inside your Marketo account. Please provide this information to your internal Marketo team to perform these tasks.

- 1. Login to Marketo with an admin account**
- 2. Create a Rest API User**
 - Go to “Admin,” then to “Users and Roles” and click the “Roles” tab
 - Click “New Role”
 - Give the role a name, such as Fuel Cycle API

- d. Under Permissions, select the following:

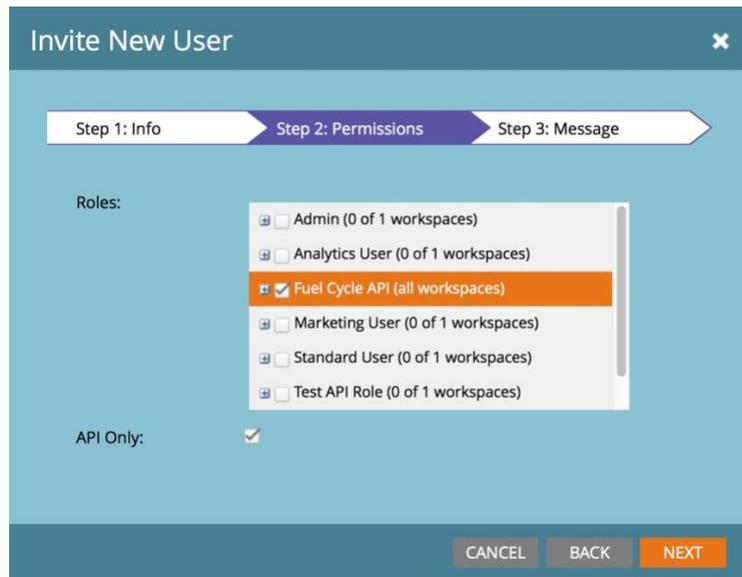


- i. Access Admin
 - ii. Access API
 - iii. Access Lead Database
 - iv. Access Marketing Activities
- e. Save new role
- f. Return to the “Users” tab and select “Invite New User”
- g. Step 1: Info



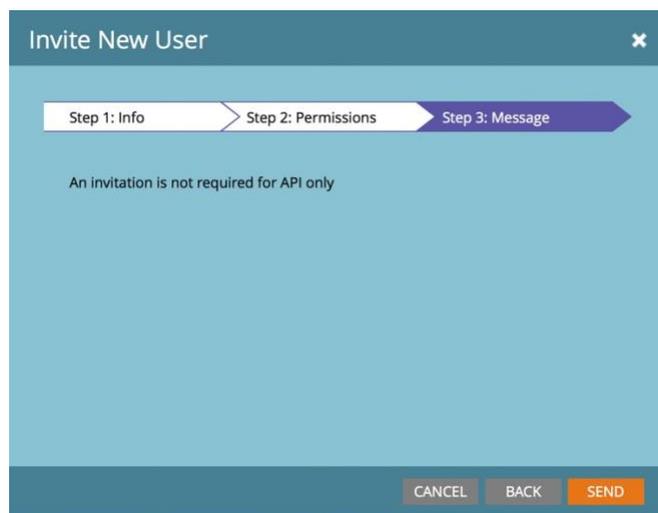
- i. Enter an email address for the user
- ii. Give the user a descriptive name, such as “Fuel Cycle API User”
- iii. Reason is optional, but is useful to description user to other account members
- iv. Leave Access Expires blank and the click Next

h. Step 2: Permissions



- i. Select the API Role you just created, then click “API Only” and click Next.

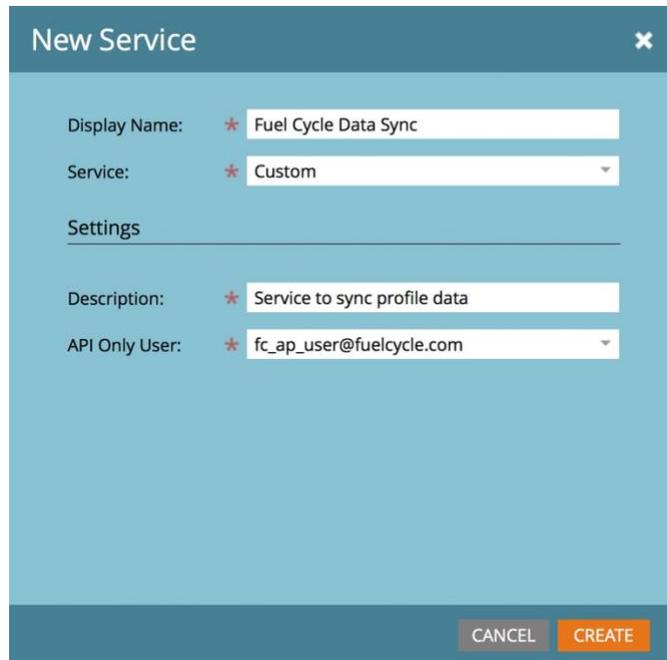
i. Step 3: Message



- i. Click “Send” to complete user creation. Note: Invitation is not required for an API only user.

3. Create a New Service

- a. Go to the Admin menu, then to LaunchPoint.
- b. Click on the New menu and select New Service.



- i. Give your service a descriptive name
 - ii. Select “Custom” from the Service dropdown menu.
 - iii. Under Settings, enter a description
 - iv. Select your new user you created above from the API Only User dropdown menu and click on Create.
- c. Click “View Details,” then copy and save the Client ID and Client Secret, which will need to be given to the person who will enter the information inside Fuel Cycle.



4. Find REST API Endpoint

- a. Go to the Admin menu, then to Web Services
- b. Under REST API, locate the Endpoint value then copy and save. This will need to be given to the person who will enter the information inside Fuel Cycle.

Web Services
 Manage Web Services

SOAP API

| | |
|-------------------------|---|
| Endpoint: | https://831-SSI-993.mktoapi.com/soap/mktows/3_1 |
| Access Status: | Active |
| Status Reason: | |
| User ID: | MKTOWS_831-SSI-993_1 |
| Encryption Key: | 069602960484954255BB003300EE12F02244000B1E |
| SOAP API documentation: | http://developers.marketo.com/documentation/soap |

REST API

| | |
|-------------------------|---|
| Endpoint: | https://831-SSI-993.mktorest.com/rest |
| Identity: | https://831-SSI-993.mktorest.com/identity |
| REST API documentation: | http://developers.marketo.com/documentation/rest |

5. You are done with this portion of the setup. Please give the Client ID, Client Secret, and REST API Endpoint to your internal Fuel Cycle team member.
 - a. **Please Note:** You will need to work with your Fuel Cycle team after the setup is complete inside Fuel Cycle to determine the data that should be pushed from Marketo to Fuel Cycle (details outlined below). Your Fuel Cycle team will work with you when that step is ready.

Fuel Cycle Configuration Steps

The following steps are done inside your Fuel Cycle account. Please provide this information to your internal Fuel Cycle team to perform these tasks

1. **Create connection to Marketo inside Fuel Cycle**
 - a. Login to the Fuel Cycle Admin
 - b. Navigate to Exchange and click the “Configure” button on the Marketo card
 - c. From the settings page, enter the following details that you saved from the Marketo steps outlined above:
 - i. Account Nickname: This is for internal use only and can be any name you want to give it
 - ii. Client ID
 - iii. Client Secret
 - iv. REST API Endpoint
 1. **IMPORTANT:** Use only the first part of the REST API Endpoint that ends with .com (remove the /rest part at the end)

Example:

The full REST API Endpoint is http://831-SSI-993.mktorest.com/rest but only

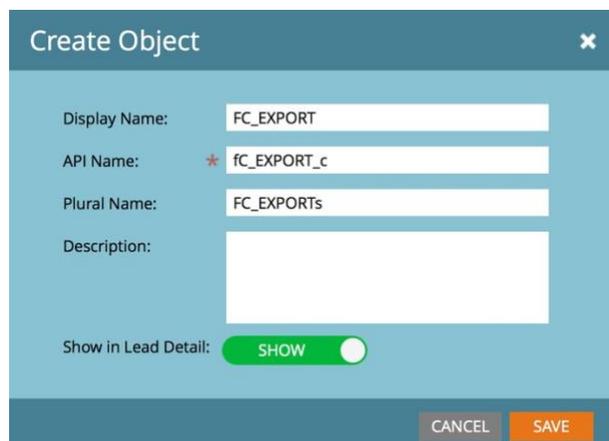
enter the following: <http://831-SSI-993.mktorest.com>

- d. You can then choose what type of data sync options you want to enable for the community:
 - i. **Pull Data from Marketo:** When this option is selected, you need to create a Custom Object called FC_EXPORT then add all profile data you want pulled from Marketo to Fuel Cycle as fields to this custom object.
 - ii. **Push Data to Marketo:** When this option is selected, you need to create a Custom Object called FC_IMPORT then create a field for each Fuel Cycle profile map that you want to push into Marketo.
- e. Click the “Test Connection” button to verify the connection between Fuel Cycle and Marketo works.
- f. Once the test is successful, you can Save the configuration.
- g. The configuration is now done, but additional steps are needed to choose the data to include in the sync (see below).

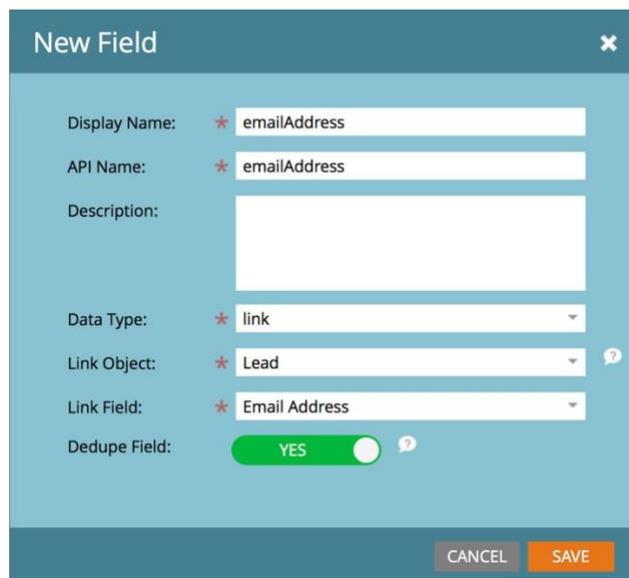
Setting up Profile Data to Sync

1. Pull Data

- a. *Steps B-N are done inside your Marketo account. Please provide this information to your internal Marketo team to perform these tasks.*
- b. Once the connection is saved in Fuel Cycle, you must create a Custom Object in Marketo and place Marketo profile data you want to pull into Fuel Cycle.
- c. Login into Marketo with an admin account.
- d. Go to “Admin,” then “Marketo Custom Objects”
- e. Click “New Custom Object”
- f. Give the fields the following values. Please note: These must be exactly as outlined below.

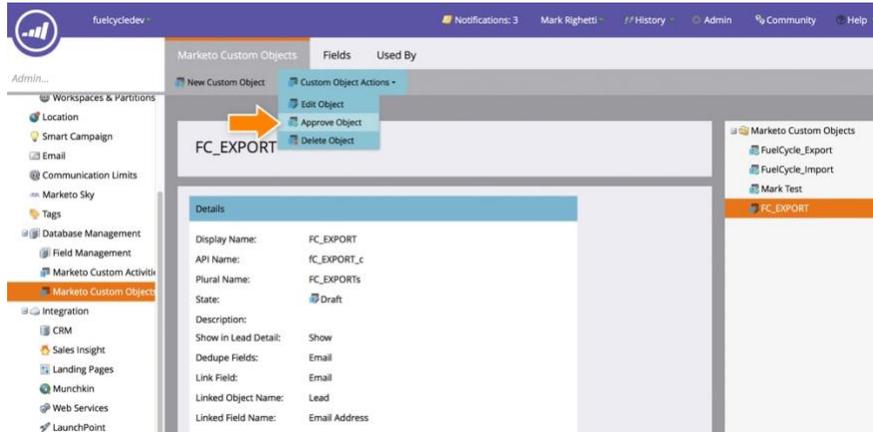


- i. Display Name: FC_EXPORT
 - ii. API NAME: FC_EXPORT_c
 - iii. Plural Name: FC_EXPORTs
 - iv. Description (ok to leave blank)
 - v. Show in Lead Detail: Show
- g. Click “Save” and you’ll see your new custom object.
- h. Now to go to “Fields” and click “New Field” making sure “FC_EXPORT” is selected on the right
- i. Enter the following exactly as shown below:

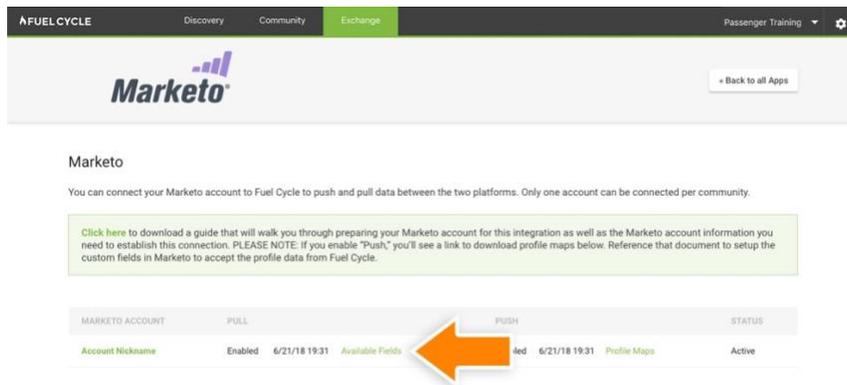


- i. Display Name: emailAddress
 - ii. API Name: emailAddress
 - iii. Description (ok to leave blank)
 - iv. Data Type: Link
 - v. Link Object: Lead
 - vi. Link Field: Email Address
 - vii. Dedupe Field: Yes
- j. Click “Save” to create the field. This field will be used to match leads in Marketo to members in Fuel Cycle.
- k. You can now add additional fields that you want to export (pull) into Fuel Cycle.
- i. *Work with your Fuel Cycle team to determine the profile data that you want to pull into Fuel Cycle.*
 - ii. For additional fields added to this custom object, set the Data Type as “Text”
- l. When done adding fields, you need to approve the custom object. Return to the “Marketo Custom Objects” tab and make sure the FC_EXPORT object is selected in the right column.

- m. Click the “Custom Object Actions” dropdown and select “Approve Object”



- n. Your custom object is now ready to export data into Fuel Cycle.
- o. Every 24 hours, Fuel Cycle will pull all data from FC_EXPORT into Fuel Cycle. The sync will occur every 24 hours at midnight Pacific.
- p. You can return to Fuel Cycle Exchange > Marketo to view the date and time the most recent pull sync occurred.
- q. In addition, you can click the “Available Fields” link to view all of the fields that have been pulled from Marketo.



- r. All data that comes from Marketo will be imported as qualitative data, which may not be useful inside Fuel Cycle for all fields.
 - i. When you click the “Available Fields” link, you’ll be taken to a page where you can view all imported fields including the total number of values imported from each field.



Marketo » Available Fields

The following fields are pulled from your Marketo account. By default, this data is imported as qualitative data.

You can change the type to quantitative, which will group all of the same answers together. This will allow you to use the field as a source in quantitative profile maps and for dynamic grouping. The # of Values column can be useful in helping you decide if the field will be best suited as a quantitative or qualitative source. NOTE: Once you convert a field to quantitative, you cannot change it back to qualitative.

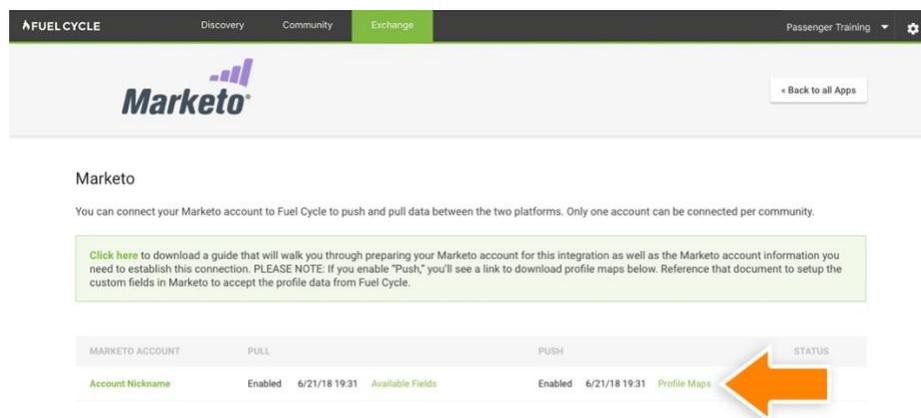
| FIELD NAME | # OF VALUES | TYPE |
|--------------------|-------------|---|
| Loyalty Tier | 3 | Qualitative Convert to Quantitative |
| Professional Title | 10 | Quantitative |
| Company | 250 | Qualitative Convert to Quantitative |
| Years as Customer | 100 | Qualitative Convert to Quantitative |

- ii. You can click the # of Values link to view a list of all values.
- iii. If you have a field that you want to convert into a Quantitative data source, click the “Convert to Quantitative” link and the field will be converted so that you can use it as a source for quantitative profile maps. This is valuable because you can then use the data for dynamic grouping.
 - 1. EXAMPLE USE CASE:
 - a. You have a field called “Loyalty Tier” from Marketo with only 3 possible values for “Platinum,” “Gold,” and “Silver.”
 - b. You want to be able to create a dynamic group of all members in the Platinum tier.
 - c. To achieve this, convert the field to Quantitative and then create a new profile map with Loyalty Tier as the source (since the field has been converted, you can map it like a survey question).
 - d. You can then create a dynamic group of all members with the loyalty tier as Platinum.
 - 2. **IMPORTANT:** *Once a field has been converted to Quantitative, it cannot be changed back to Qualitative. Make sure you want to convert the field before clicking the link.*
- s. All imported data (as either qualitative and quantitative) can be used as a source in profile maps. By adding it as a source to profile maps, the data can then be added to member exports, pushed as embedded data to SurveyGizmo or Qualtrics and can be used in dynamic grouping logic.

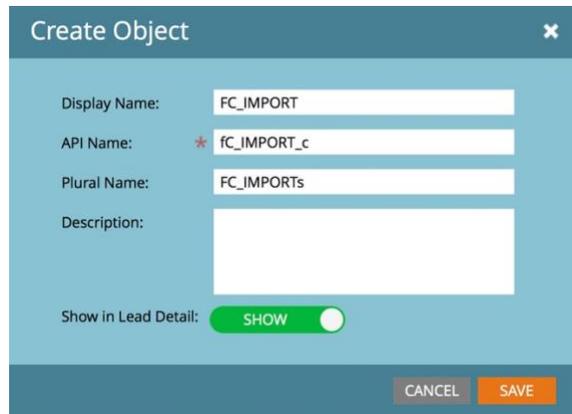
2. Push Data

- a. You will need to select the Fuel Cycle profile map data that you want to push to Marketo.

- b. To do this, go to Members > Profile Maps and click to edit a profile map you want to push to Marketo.
- c. You'll see a new option for "Push to CRMS" in the first tab. Simply select this option and click the Save button to enable the push for that profile map.
 - i. Continue to enable the option for all profile maps you want to push to Marketo.
- d. When done, make sure to click the "Refresh Data" button to save all changes to the Profile Maps.
- e. Now, you need to create a Custom Object and Fields in Marketo where the Fuel Cycle data will be pushed.
- f. First, return to Exchange > Marketo and locate the "Profile Maps" link next to the Push status:

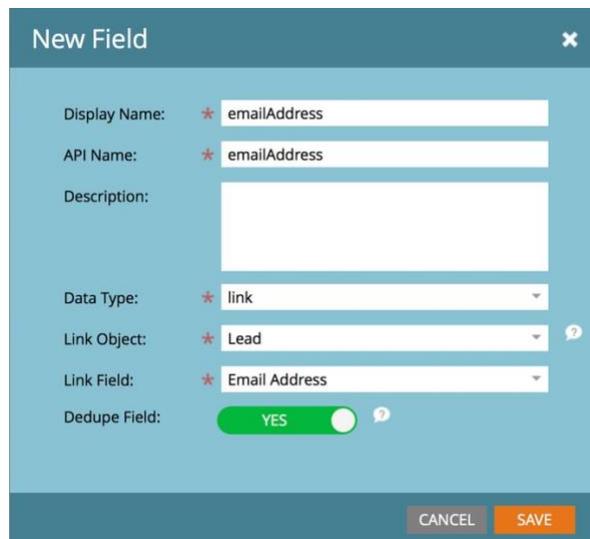


- i. When you click the link, a file will download listing all profile maps. You will need to use this when creating fields in Marketo as outlined below.
- g. *The following steps are done inside your Marketo account. Please provide this information to your internal Marketo team to perform these tasks.*
- h. Login into Marketo with an admin account.
- i. Go to "Admin," then "Marketo Custom Objects"
- j. Click "New Custom Object"
- k. Give the fields the following values. Please note: These must be exactly as outlined below.



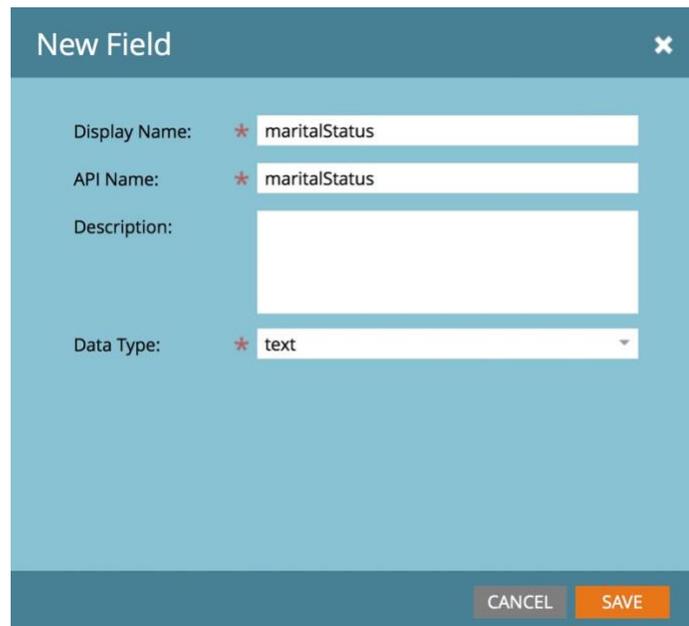
- i. Display Name: FC_IMPORT
- ii. API NAME: FC_IMPORT_c
- iii. Plural Name: FC_IMPORTs
- iv. Description (ok to leave blank)
- v. Show in Lead Detail: Show

- l. Click “Save” and you’ll see your new custom object.
- m. Now to go to “Field” and click “New Field” making sure “FC_IMPORT” is selected on the right
- n. Enter the following exactly as shown below:

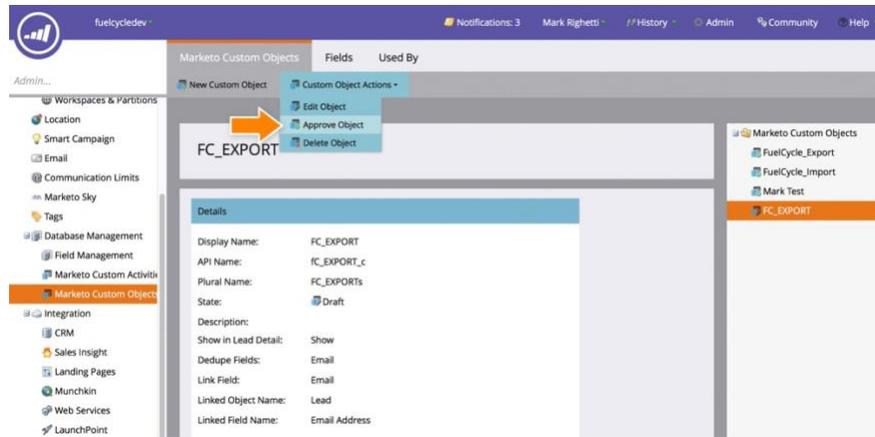


- i. Display Name: emailAddress
- ii. API Name: emailAddress
- iii. Description (ok to leave blank)
- iv. Data Type: Link
- v. Link Object: Lead
- vi. Link Field: Email Address
- vii. Dedupe Field: Yes

- o. Click “Save” to create the field. This field will be used to match leads in Marketo to members in Fuel Cycle.
- p. You must now create a field for each Profile Map you want to push into Marketo from Fuel Cycle with the Data Type “text”.
 - i. Open the profile map file you downloaded from Fuel Cycle to use as a reference for each field to create.
 - 1. **IMPORTANT: You must create a field for EVERY profile map listed in the CSV file from Fuel Cycle. If you do not have a corresponding field for each profile map in the CSV, the job will fail and no data will import into Marketo.**
 - ii. You will need to use the exact same naming convention and enter the value in the “API Name” column in the CSV file.
 - iii. Example: If the API Name in the document is “maritalStatus” enter as follows:



- iv. Display Name: maritalStatus (this is case sensitive)
- v. API Name: marital Status
- vi. Data Type: text
- q. Continue to create a new field for each profile map in the CSV file.
- r. When done adding fields, you need to approve the custom object for the changes to take effect. Return to the “Marketo Custom Objects” tab and make sure the FC_IMPORT object is selected in the right column.
- s. Click the “Custom Object Actions” dropdown and select “Approve Object”



- t. Your custom object is now ready to accept data pushed from Fuel Cycle.
- u. Every 24 hours, Fuel Cycle will push all profile map data into FC_IMPORT. The sync will occur every day at midnight Pacific.
- v. You can return to Fuel Cycle Exchange > Marketo to view the date and time the most recent push sync occurred.

Troubleshooting Issues

Failed Sync Job

If a sync job has failed, you'll see a red warning icon and the date and time when the sync failed in red. There are many reasons a sync might fail and there are often no details available as to why. We will continue to attempt to run the sync job every 24 hours. In many cases, if there is a failure, it will work the next time the job runs. Once it runs successfully, the warning icon will no longer display to let you know it's working properly.

In the case of the job continuing to fail, please check all settings to verify the connection is still working. Use the Test Connection button to verify the connection is working properly.

Missing Profile Map Data in FC_IMPORT

When new profile maps are added to Fuel Cycle that you want to use in Marketo, you MUST add a new field into FC_IMPORT custom object with the reference name of the profile map. Please check the following:

1. Go to Fuel Cycle > Exchange > Marketo and click to download the latest profile map CSV.
2. Return to Marketo and go to the FC_IMPORT custom object.
3. Click on the Fields and verify all API Names in the CSV file have a corresponding field in the custom object.
4. If you make any changes or add new fields, make sure to approve the changes to the custom object.
5. The next time the job runs, the data will be pushed correct.

Please note: If you change the Question Reference of a profile map in Fuel Cycle, you will also need to change the API Name in Marketo to match the new reference. It's recommended you don't edit references of profile maps after they are created to ensure the link between Marketo and Fuel Cycle doesn't break.