

INTEGRATING SPLASH WITH MARKETOPOLYX CONFIGURATION GUIDE

splash

Revision History

Document Name	Date	Description
Splash + Marketo Integration Guide	2019.05.01	Initial Release
Splash + Marketo Integration Guide	2019.11.05	Updates to Section 4.4: Program Cloning
Splash + Marketo Integration Guide	2019.11.06	Update to Section 3.3: Marketo Programs – note regarding date-time field 611 error.
Integrating Splash with Marketo: Configuration Guide	2020.03.06	<ul style="list-style-type: none">• Renamed• Add 5.0 Integration Validation• Add 6.1 Error Messaging

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1 INTRODUCTION

For many marketing teams, Marketo is a truly indispensable, go-to marketing automation and tracking system. It's no wonder why we would create a way to seamlessly link it with Splash. This combination opens a window into the true impact your events are having. The integration realizes this potential through the cloning of Marketo programs to represent Splash events, syncing the Splash guest list with Marketo program members, and communicating additional critical details between the two using tokens.

This guide explores the process of setting up and testing the Marketo integration with Splash. The process begins with the creation of programs, campaign assets and tokens in Marketo. This is followed by configuration of Splash triggers, behaviors, and mappings. Leveraging Marketo's powerful integration with Splash supports smarter event decision making and a more dynamic marketing funnel.

1.1 System Requirements/Prerequisites

- Familiarity with Splash & Marketo
- Splash Enterprise Account
- Marketo Account

2 INTEGRATION BASICS

The overall structure and workflow of the integration is a logical consequence of the structure of each platform and the problems they solve. The following elements are essential to the integration:

- Splash Events / Marketo Programs
- Splash Guests / Marketo Program Members
- Tokens

2.1 Marketo Programs and Splash Events

Marketo programs are the equivalent of Splash events. Programs contain elements such as marketing assets and logic flows, which serve to automate marketing processes. This Marketo automation functionality can now be leveraged as part of the Splash event lifecycle.

Creating an event in Splash triggers the integration to clone a template program set up in Marketo according to parameters defined in Splash, such as the date or title.

2.2 Program Members and Event Guests

Splash event attendees are represented in Marketo as program members. Synchronizing this data across the two systems is the second pillar of the integration. This feature operates bi-directionally, meaning, changes made in either platform are reflected in the other platform. Altering data like a guest's check-in date in Splash causes a corresponding change to the Marketo program member, and vice versa.

2.3 Using Tokens

The final element of the integration is the token. Event information is not transferred by mapping guests to members or cloning templates. Marketo tokens fill this gap by allowing Marketo to access a variety of Splash data fields. Marketo tokens represent a piece of information that is contextually filled in later. Tokens are defined in Marketo and added to various assets ahead of time. In Splash, the tokens are then mapped to various data fields. When the integration is triggered, Splash tells Marketo which information goes into those tokens.

3 MARKETO SETUP

The process begins with configuring Marketo for the integration. The first step is to acquire Marketo access credentials. The next step entails setting up a program channel to which Splash guest statuses map. The final piece is to create a template program and clone it for each event along with an email asset with a number of tokens. Save and have these elements approved before moving on to the Splash set up (see Chapter 4, *Splash Setup*).

3.1 Marketo Credentials

Marketo API credentials have the following essential elements:

- Client ID
- Client Secret
- Munchkin Account ID

These are located by navigating to the administration section, *Marketo Admin*, in Marketo.

1. In the *Marketo Admin* section, select the *LaunchPoint* menu.

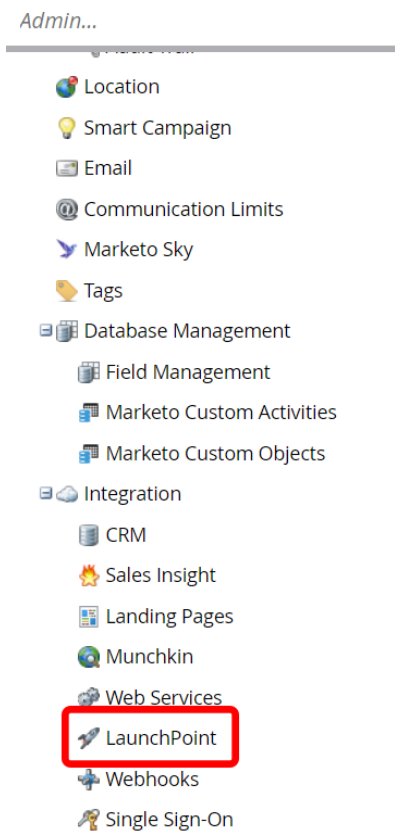


Figure 1. Marketo Navigation Panel

2. In the *Installed Services* window that displays, select a **Custom Service**.
 Splash uses this to connect to Marketo.

Note: The Installed Service User must have several specific API permissions. Be sure to include:

- ✓ Read-Only Activity
- ✓ Read-Only Campaigns
- ✓ Read-Write Lead
- ✓ Read-Write Asset
- ✓ Activity Campaign

For more information about creating users, roles, and assigning permissions, see the [Marketo Custom Services documentation](#).

3. Click View Details.
4. The *Details* window contains **Client ID** and **Client Secret** information. Copy these values for use later in the process.

Note: These are extremely sensitive credentials. Keep them secure!

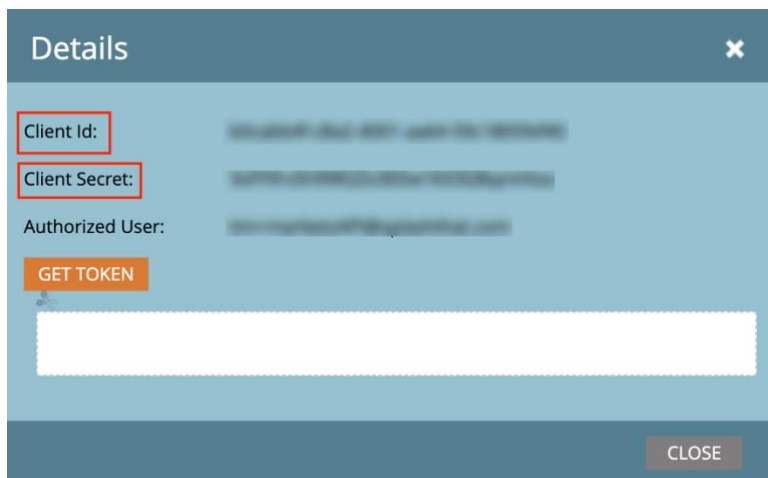


Figure 2. Marketo User Details Window

5. Close the *Details* window.
6. From the *Navigation* panel, select the *Munchkin* menu item.

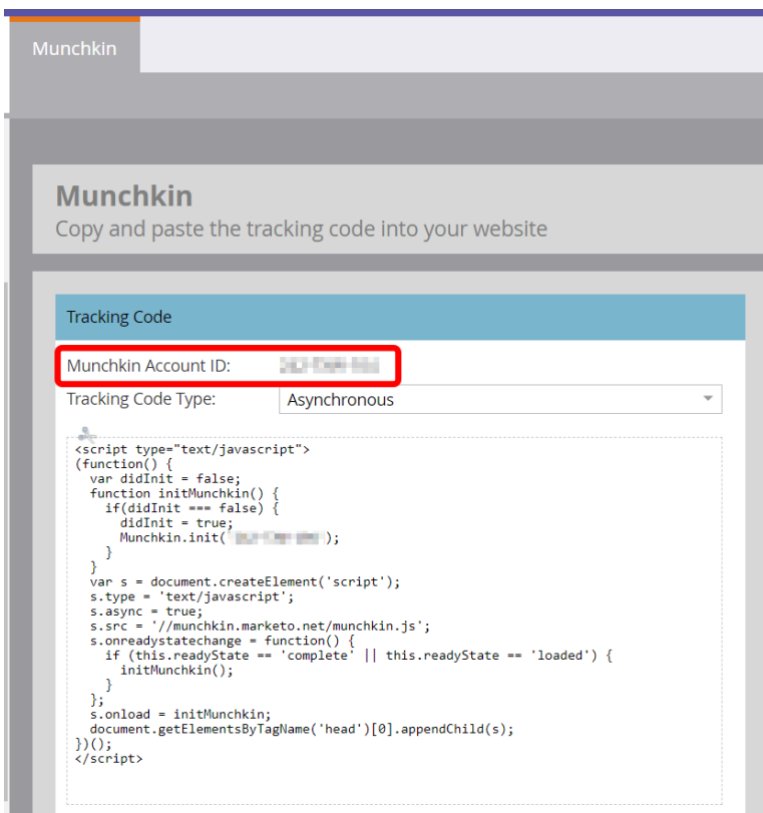


Figure 3. Marketo Munchkin Area

7. Locate the **Munchkin Account ID** field in the *Munchkin* screen and copy it for later use.

3.2 Marketo Program Channels

A Program Channel is a mechanism in Marketo used to track a lead’s progression through a marketing program. There is no *right way* to set up a program channel, but one must be set up to map Splash Attendee Statuses.

1. Locate or create a Program Channel for Splash events by selecting the *Tags* menu item in the *Marketo Navigation* panel.
2. Expand the **Channel** folder.

Tag Type	Applies To	Required	Used By
Channel		✓	178
Email Send			0
FM - Program Channel			1
List Import			4
Live Event			1
Mobile In-App			0
QA Splash Events			1
Splash Event			169
Tradeshow			1
Web Form			1
Webinar			0

Figure 4. Marketo Channels

3. Select the *New > New Channel* menu to create a new channel.
The *New Channel* window displays.

New Channel [Close]

Channel: *

Applies to: * Default

Analytics Behavior: Normal (requires period cost)

Program

To reorder, change the step number

Status	Step	Success
Member	10	☐
<input type="text"/>	20	☐

ADD STEP

Warning: Do not copy labels from one field to another, this will rename the status in existing Smart Campaigns

[CANCEL] [CREATE]

Figure 5. Marketo New Channel Window: Define Channel

4. Enter the details for the new channel and in the lower half configure the statuses.

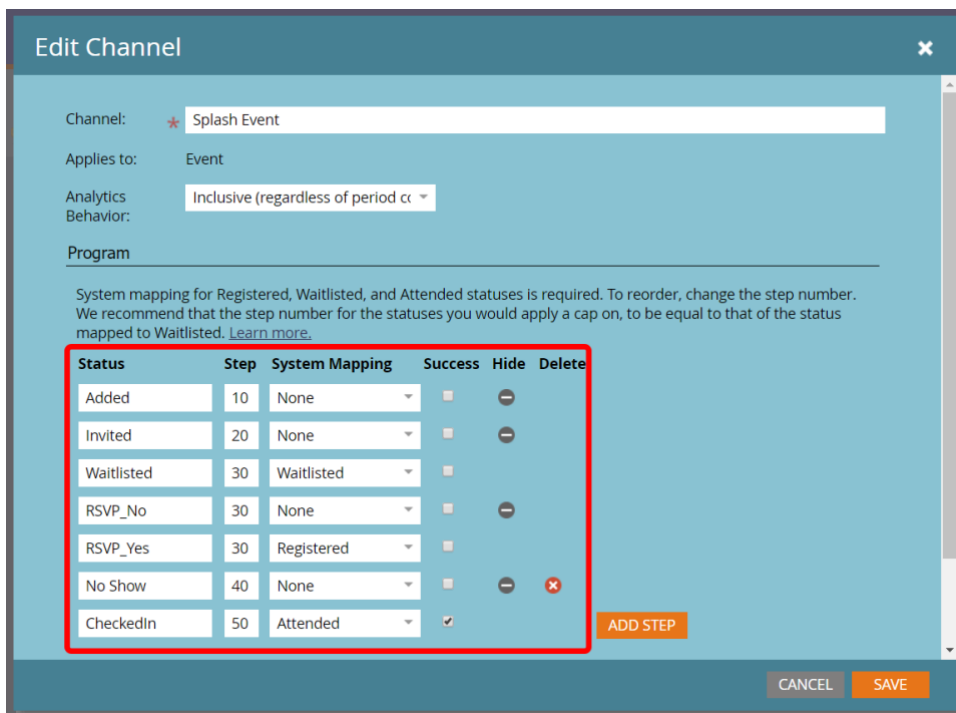


Figure 6. Marketo New Channel Window: Channel Details and Statuses

3.3 Marketo Programs

After establishing the credentials and channel, a program representing the Splash Event in Marketo must be set up. This program acts as a template that is cloned and modified for each event created in Splash.

Note: Each template MUST be created from scratch. Cloning an existing template to act as a starting point for a new one may seem like a time-saver, but it can lead to errors and other unexpected behaviors. As a result, it is imperative to begin with a blank slate each time.

Note: The Marketo API contains cloning limitations when using the **date-time** field in a Smart Campaign. The use of this field results in a *611 Unable to Clone* error preventing Splash from cloning the program. Splash recommends using the **date** field as an alternative to avoid this error.

This process is identical to that used to create any other program in Marketo.

1. Navigate to the *Marketing Activities* section.
2. Create a New Program.

Figure 7. Marketo New Program Window

3. In the **Campaign Folder** field, select the folder in which to save the template.
4. Next, enter an appropriate program name in the **Name** field.
5. Use the *Program Type* picklist to select the appropriate type, most likely *Event*.
6. Ensure the **Channel** is set to one you intend to map to Splash events.
7. Optionally, provide a description in the **Description** field.
8. Once the form is complete, click the **Create** button to save the new program.

4 SPLASH SETUP

Mirroring the process for setting up Marketo, Splash is prepared by creating and authenticating the integration. This entails configuration of triggers and determining the circumstances under which it launches. Next, specify a Marketo base template program, which is then cloned to represent the Splash event. Establish a naming convention before mapping tokens and program channel statuses. Finally, map guests and leads before saving and turning on the integration.

1. Create and authenticate the integration by logging in to your Splash account and selecting the *Integrations* tab in the left navigation panel of the *Events Dashboard*.

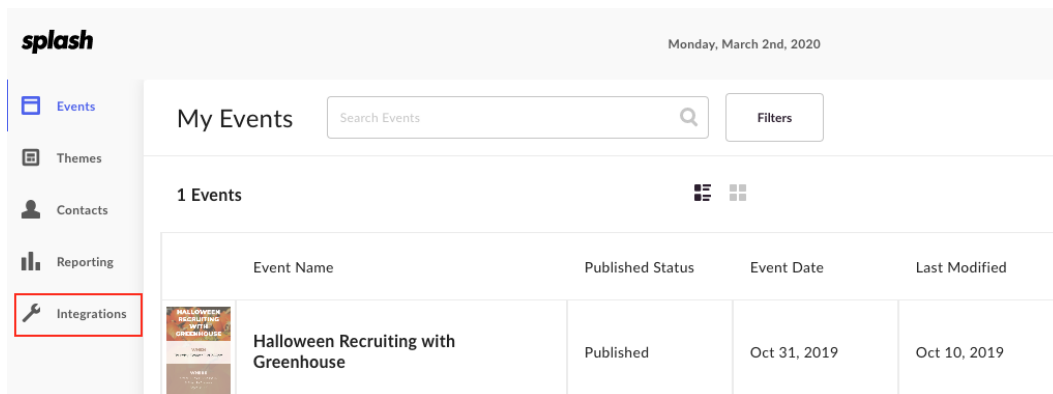


Figure 8. Splash Events Dashboard: Integrations Tab

2. In the *Integrations* window, click the **New Integration** button and select *Marketo (v2)*.

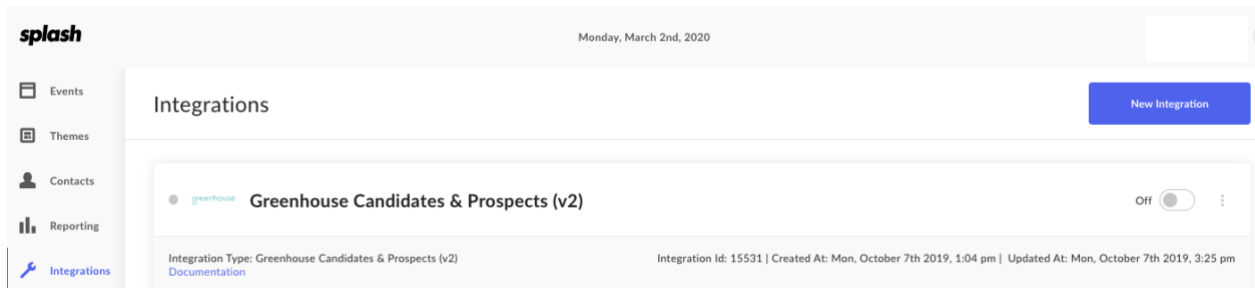


Figure 9. Integrations Window: New Integration

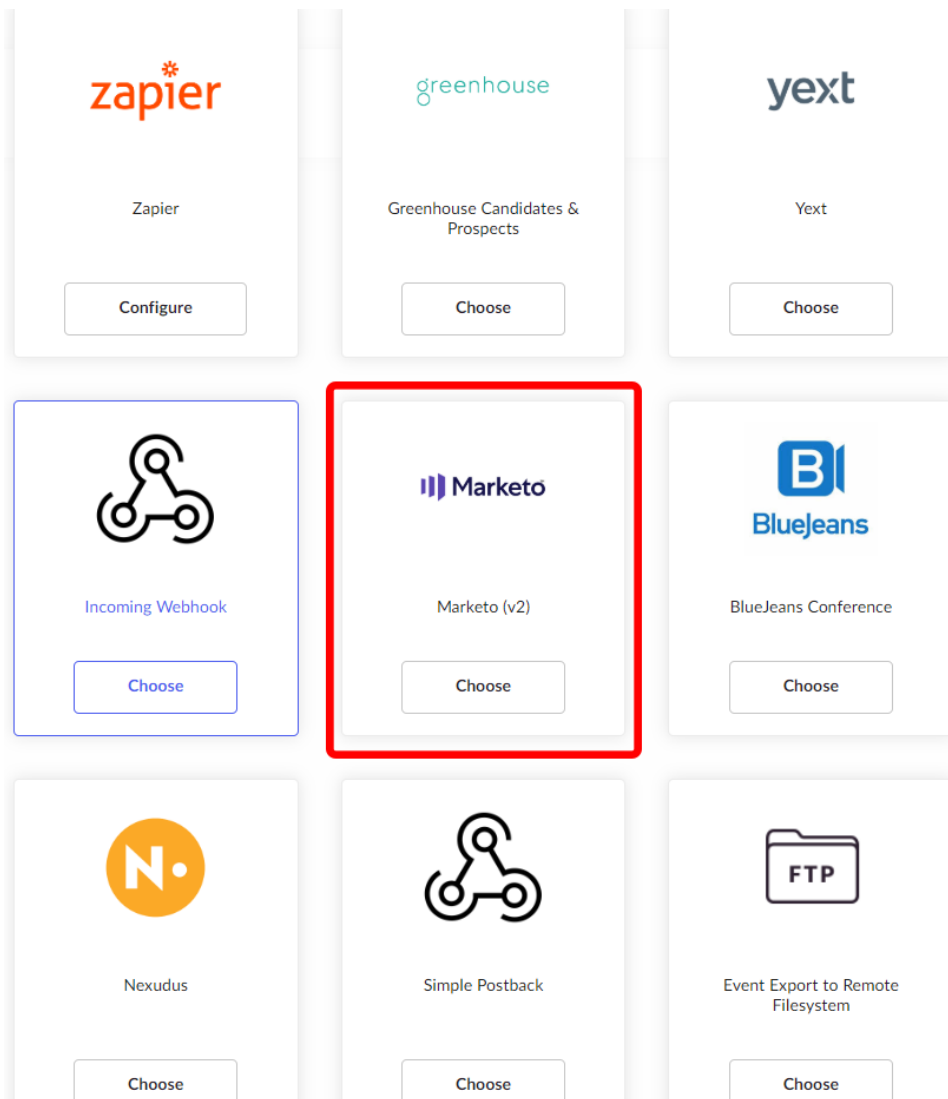


Figure 10. Splash Integrations Selection Window

4.1 Authentication Details

Begin the setup by entering the authentication details.

1. Locate the Marketo credentials collected earlier and navigate to the *Authentication Details* section.

Authentication Details

Munchkin Account ID *

This can be found in the Marketo Admin area, under Integrations > Munchkin. It's usually a nine digit, alphanumeric code.

Client ID *

Client Secret *

Figure 11. Integration Details and Credentials Test

2. Enter the **Munchkin Account ID**, **Client ID** and **Client Secret** located earlier in the Marketo API User Account.
3. Click the **Test Credentials** button.

Successful authentication tests display the message “Authentication Successful! You may now configure the rest of the integration.”

A message will also indicate if the credentials test is unsuccessful.

4.2 Integration Name, Actions and Triggers

Enter a descriptive name for the new integration in the **Integration Name** field.

Integration Name	
<input type="text" value="Marketo (v2)"/>	
Action	Trigger
<input type="text" value="Clone Program"/>	<input type="text" value="Create"/>
Action	Trigger
<input type="text" value="Create or Update Leads"/>	<input type="text" value="RSVP Yes, Check-In, Unsubscribe from Event, Unsubscribe"/>
Action	Trigger
<input type="text" value="Sync Lead and Program Member Data from Splash, into Ma"/>	<input type="text" value="Every 15 Minutes"/>
Action	Trigger
<input type="text" value="Pull Lead and Program Member Data from Marketo, into Sp"/>	<input type="text" value="Every 15 Minutes"/>

Figure 12. Name, Action & Trigger Area

The integration is divided into the following four actions. Each action can be configured separately. The triggers associated with each action determine how the integration behaves.

4.2.1 Clone Program

The **Clone Program** action allows the integration to create a new Marketo program for each new event created in Splash. To enable this option, select *Create* or *Update* from the *Trigger* picklist. Splash recommends selecting **Update** as this trigger also fires when an event is created.

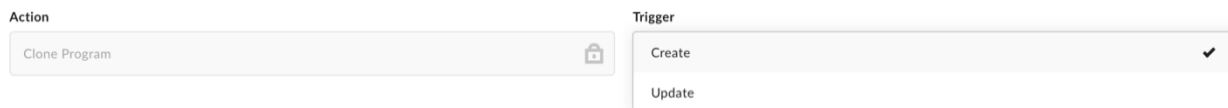


Figure 13. Clone Program Action & Create Trigger

4.2.2 Create or Update Leads

The **Create or Update Leads** action enables the integration to send guest data to Marketo’s Lead Database and Programs as changes occur in real time. Only guest actions that need to be immediately updated in Marketo should be selected. Marketo Leads/Programs members are not created or updated when all fields are left blank. This functionality is dependent upon the settings designated in *Program Channel Status Mapping* section (see section 4.6).

Note: This method requires numerous calls to the Marketo API. Splash recommends avoiding this method except for situations where near-real-time updates are required.

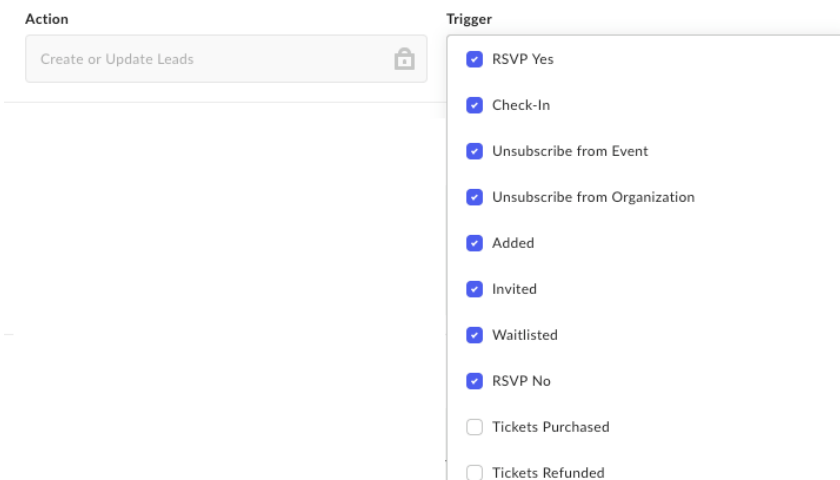


Figure 14. Create or Update Leads Action & Triggers

4.2.3 Sync Lead and Program Member Data from Splash

This action pushes leads and contacts from Splash events to their Marketo program counterparts. The trigger for this action is a timer with several frequency options. At the end of the designated frequency, all leads in Marketo mass update to match the associated Splash event. This functionality is dependent upon the settings designated in *Program Channel Status Mapping* section (see section 4.6).

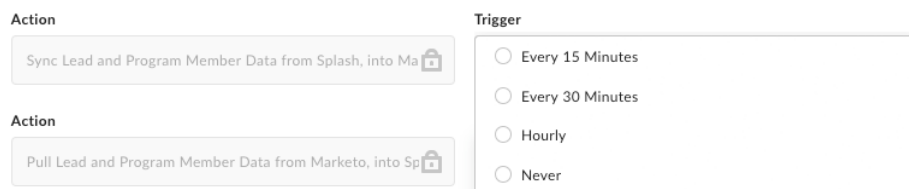


Figure 15. Sync Leads Action & Triggers

4.2.4 Pull Lead and Program Member Data from Marketo

This action performs the reverse of **Sync Leads**, pulling information from Marketo and synchronizing it with the associated Splash event. Similar to the Sync Leads action, Pull Leads is triggered by a timer set to a chosen interval. Combining the Pull and Sync Leads actions enables a true bi-directional integration between Splash and Marketo.

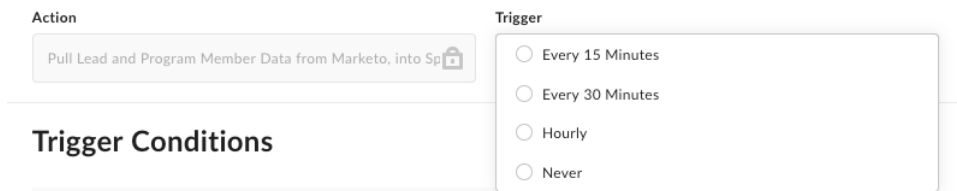


Figure 16. Pull Leads Action & Triggers

4.3 Trigger Conditions

Trigger Conditions can be used to limit the launch of the integration to certain event types and/or for specific user groups. This is an excellent way to tie Template Programs to Event Types to create different automation rules for different event types.

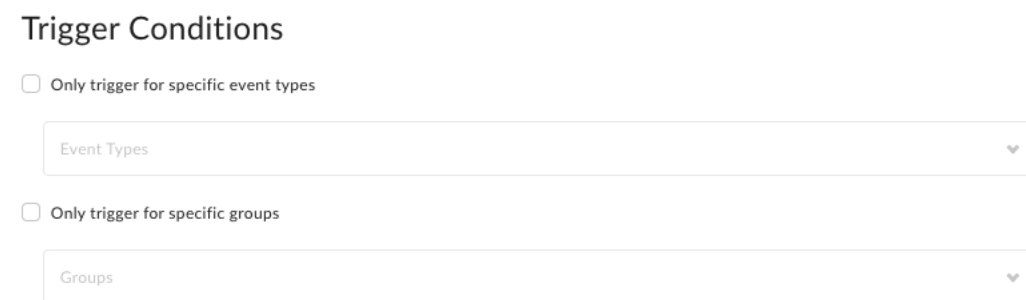


Figure 17. Trigger Conditions

Select the *Only trigger for specific event types* checkbox to limit the integration trigger to event types. Select the event type(s) from the corresponding picklist field below the checkbox.

Select the *Only trigger for specific groups* checkbox to limit the integration trigger to events within specified user groups. Select the group(s) from the corresponding picklist field below the checkbox.

4.4 Program Cloning

Creation of new Splash events triggers creation of new Marketo programs. In this panel, select the Marketo program to be cloned when new events are created. This program is also referred to as the *Base Program*.

Program Cloning

Base Marketo Program ?
 Select base Marketo Program to clone when new events are created

By name ▼ 1961 Base Program (2) Q ✔ Program Verified

Program Name: 1961 Base Program (2)	Created At: June 28, 2019 12:00AM
Program ID: 7461	Last Updated: June 28, 2019 12:00AM
Channel: Splash Event	URL: https://app-sj17.marketo.com/#ME7461A1
Description: -	

Cloned Program Naming Convention ?

[event.id] [event.title] [event.venue_name] [event.event_start]

[View Dynamic Tags](#)

- Turn on all triggered campaigns for this program. ?
- Automatically update the Marketo Program tokens when the connected Splash event settings are updated. ?
- Automatically update the Marketo Program name when the connected Splash event settings are updated. ?
- Give event planners option to skip program creation. ?
- Sync Removed (Deleted) Guests and Removed Marketo Program Members. ?

Figure 18. Program Cloning

First, use the picklist to search Marketo programs by name or ID and begin entering the name or ID of the template program in the related field. When searching by name, a predictive list displays as text is entered into the field. Click the search icon magnifying glass to complete the search. This prompts the integration to query Marketo for a list of programs that match those search parameters. Select the template from the list shown.

Note: Searching by ID does not utilize predictive search methods.

4.4.1 Cloned Program Naming Convention and Dynamic Tags

When hosting numerous events, creation of a standardized naming and identification method in Marketo is recommended. This is where Naming Conventions enter the picture. As with Program Channels, there is no correct way to do this, it depends upon organizational needs. The example demonstrates the process by creating one that someone might conceivably use.

This stage utilizes Dynamic Tags. When the integration runs, these tags are replaced by the information to which they point, similar to Marketo Tokens.

1. Access a list of available dynamic tags by clicking the **View Dynamic Tags** link below the **Cloned Program Naming Convention** field.

Explore the *Dynamic Tags* window that displays.

DESCRIPTION	TAG
Contact First Name	[contact.first_name]
Contact Last Name	[contact.last_name]
Contact Job Title	[contact.job_title]
Contact Email	[contact.email]
Contact Organization	[contact.organization]
Contact Email Address MD5 encoded	[contact.email_md5]
Contact Company	[contact.company]
User First Name	[user.first_name]
User Last Name	[user.last_name]

Figure 19. Dynamic Tags Window

2. Copy and paste the chosen tags into the field.

The example utilizes [event.id], [event.title], [event.venue_name], and [event.event_start].

4.4.2 Behavior Options

Additional options to consider are located below the **Cloned Program Naming Convention** field.

- **Turn on all triggered campaigns for this program:** select this option to automatically activate the campaigns contained in the program
- **Automatically update the Marketo Program tokens when the connected Splash event settings are updated:** select this option to update Marketo program tokens when key Splash event fields are updated including event title, start time, end time, and description.
- **Automatically update the Marketo Program name when the connected Splash event settings are updated:** select this option to update the Marketo program name when key Splash event fields are updated including event title, start time, end time, and description.
- **Give event planners option to skip program creation:** select this to give event planners the option to exclude selected events from the integration.
- **Sync Removed (Deleted) Guests and Removed Marketo Program Members:** enable this to ensure that when a guest is deleted from the Splash Guest List, they are also removed from the Marketo Program, and vice-versa.

4.5 Token Mapping

Once a Marketo Program is created, Splash can create or update Program Tokens based on information about the associated event. This is how values like Event Title, Event Type, Event Owner, Event Start Date, Time zone, etc. can be sent to Marketo and used in the program.

Token Mapping

Create and update Program Tokens in your cloned program. [?](#)

Splash Object	Splash Field	Marketo Token Name
Event	Title	my. splash_eventTitle
Event	Event Type	my. splash_eventType
Custom	Development	my. splash_environment
Event	Event Owner Email	my. splash_eventOwner

Figure 20. Token Mapping

The following steps walk through setting the Event Title token, as an example.

1. Click Add a Field.
2. Click in the **Splash Object** field to access the picklist. Choose *Event*.
3. In the **Splash Field**, click to access the picklist and select *Title*.
4. In the **Marketo Token Name** field, enter the name of the token to which this information will be sent, without the “my” part (e.g., splash_eventTitle).
5. Repeat this process for the second and third tokens, venue name, and date.

Note: If Splash doesn’t find the token in Marketo, it will create a new one. Be sure to spell token names correctly to ensure Splash fields map to the correct tokens.

4.6 Program Channel Status Mapping

Program Channel Status Mapping maps the Attendee Statuses, such as attending, checked in, etc., to the statuses in the program channel the Marketo program is set to use. There are two menus to set for each status, *Splash Status* and *Marketo Channel Status*. A base program must be selected before attempting this step (see section 4.4, *Program Cloning*).

Program Channel Status Mapping
 Map the statuses from the channel associated with base Marketo program configured above.

Splash Status	→	Marketo Channel Status
Attending	→	RSVP_Yes
Not Attending	→	RSVP_No
Waitlisted	→	Waitlisted
Awaiting Reply	→	Invited
--(No Status)	→	Added
Checked In	→	Checkedin

[Add a New Mapping](#)

Figure 21. Program Channel Status Mapping

Complete these fields for each of the statuses set up in Marketo, matching them to their Splash counterparts.

4.7 Sync Leads

The last section of the integration deals with Guests and Leads.

1. Click the blue **Add a Field** button to add a field.

A window similar to the *Token Mapping* window displays. It includes a *Splash Object* menu, a *Splash Field* menu to select a field from that object, and a **Remote Field Name** searchable text box for Marketo’s remote field.

Sync Leads

Lead Field Mapping

Figure 22. Sync Leads

2. To map an attendee’s first name to a Marketo lead’s name field, set select *Contact* in the **Splash Object** field.
3. Set the **Splash Field** to *First Name*.
4. In the **Remote Field Name**, enter *first name* to find the field in Marketo.
5. Repeat these steps to map additional fields.

4.7.1 Create or Update

This section, below the Guests and Leads section, is used to define how Splash handles Marketo leads. The integration can be set to create new leads, update existing ones, or do both in Marketo. It also provides the ability to define how the integration handles duplicate email addresses for a lead by selecting *First Created*, *Most Recently Created*, or *Most Recently Updated*.

Create or Update

Create or update

Duplicate Email Lead Selection Policy

First Created

Ignore empty values

Figure 23. Create or Update Leads

At the bottom of this section is a checkbox which, when selected, sets the integration to ignore empty values. This means any mapped fields that do not have data will not be sent to the Marketo lead database.

4.8 Save & Activate

Configuration of the Splash Integration is complete! The last step in the process is to save the settings by clicking the **Save** button.

Activate the integration by scrolling to the top of the integration page and setting the button to **On**.

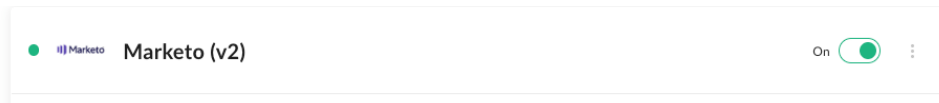


Figure 24. Activate Integration

5 INTEGRATION VALIDATION

5.1 Credential Validation

The *Authentication Details* section of the integration page includes the **Test Credentials** button. After entering values in the *Munchkin Account ID*, *Client ID*, and *Client Secret* fields, select this button to validate the credentials entered. Messaging indicates the result of the validation check (see section 4.1, *Authentication Details*).

5.2 Validation Checks

When the integrations page is launched, the integration runs through a series of validation checks to insure it is configured properly. If configuration issues are found, messages display within the page (see section 6.1, *Error Messaging* for message details).

6 TROUBLESHOOTING

6.1 Error Messaging

When accessing the integrations dashboard, the system checks that the Marketo integration is properly configured. Configuration issues are shown on the dashboard below the integration heading. Messages are described below:

- Clone program action is not selected.
This indicates that a **Clone Program** action was not selected from the picklist (see section 4.2.1, *Clone Program*).
- Base program is selected.
A Marketo program has not been selected for cloning when new events are created (see section 4.4, *Program Cloning*).
- No program channel status mappings are set
The Splash attendee statuses are not linked to the program channel statuses the Marketo program is set to use (see section 4.6, *Program Channel*).
- No email address is mapped in the Lead field mappings
In the Sync Leads panel, the Splash email address field has not been linked with a remote Marketo field (see section 4.7, *Sync Leads*).
- Both batch and real time sync triggers are enabled in the same config
When multiple Marketo integrations are enabled, the event type triggers cannot be the same. There must be a 1:1 relationship between Marketo integrations and events (see section 4.3, *Trigger Conditions*).
- Please check authentication credentials. Unable to get Access token
Something is wrong with the Munchkin Account ID, Client ID, or Client Secret preventing the integration from getting an access token (see section 4.1, *Authentication Details*).
- Required authentication credentials are missing
Authentication credentials such as Munchkin Account ID, Client ID, or Client Secret have not been entered (see section 4.1, *Authentication Details*).
- No program name template is set with valid dynamic tags in place
There is an issue with the dynamic tags in the Cloned Program Naming Convention. They may be invalid or missing (see section 4.4.1, *Cloned Program Naming Convention and Dynamic Tags*).

6.2 Activity Log

One way to identify errors or other unusual behavior from the integration is via the Activity Log, located in the *Integration Configuration* screen.

1. Select the Marketo integration and scroll to the bottom.
2. Locate the **Activity Log** button on the lower left portion of the screen.

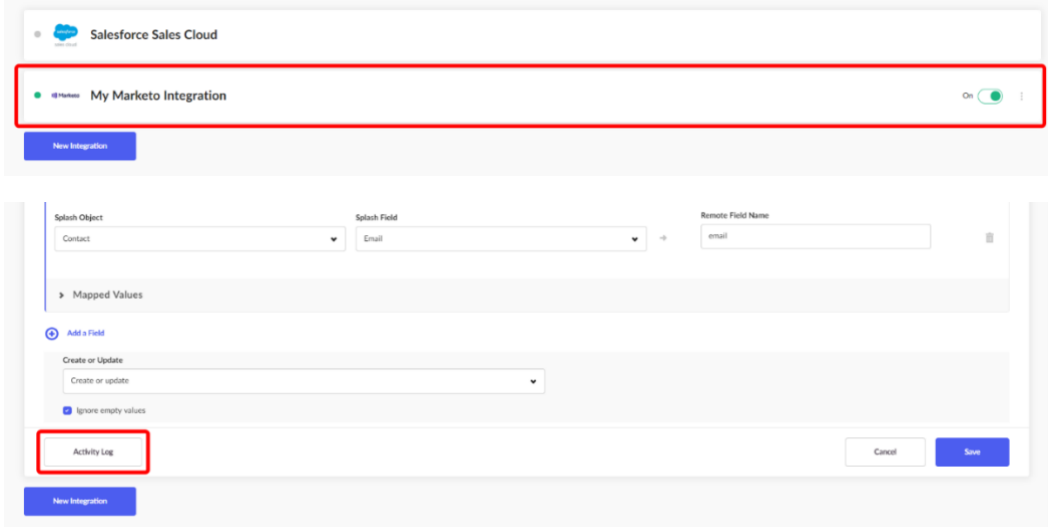


Figure 25. Splash Integration Configuration Screen: Access the Activity Log

The window displays a complete record of everything that occurred during integration. Any errors or issues are identified here.

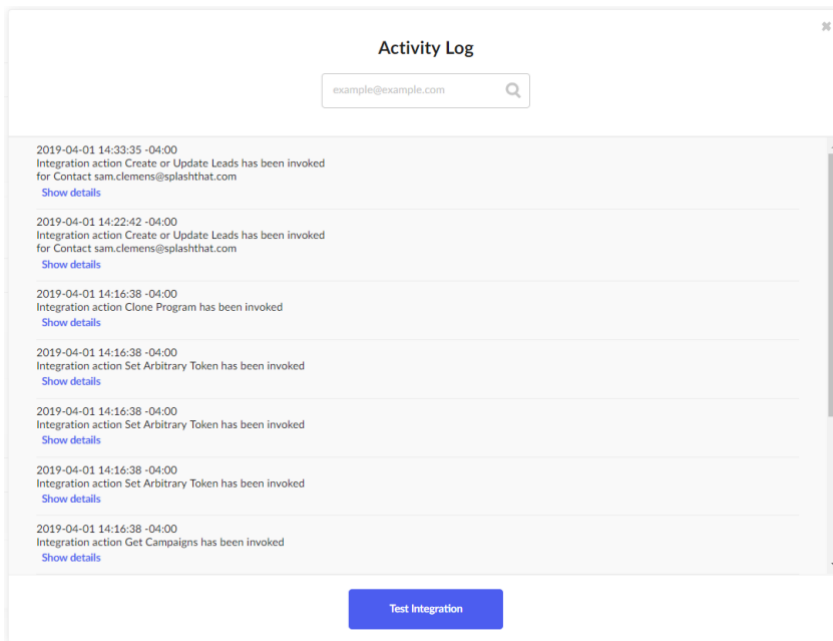


Figure 26. Splash Integration Activity Log

If troubles persist after validating the integration and exploring the activity log, contact Splash Support or your Customer Success Manager.