Alchemer Workflow Marketo Initiator

> The Marketo initiator is available for purchase as an add-on. If you are interested in purchasing, please contact us for additional information.

Overview

Marketo is a marketing automation platform that automates lead scoring, email nurturing, landing pages, events, and social campaigns. With this integration, you can initiate personalized feedback Workflows in Alchemer after specific events occur in Marketo Smart Campaigns, ensuring the collection of timely and targeted feedback from prospects.
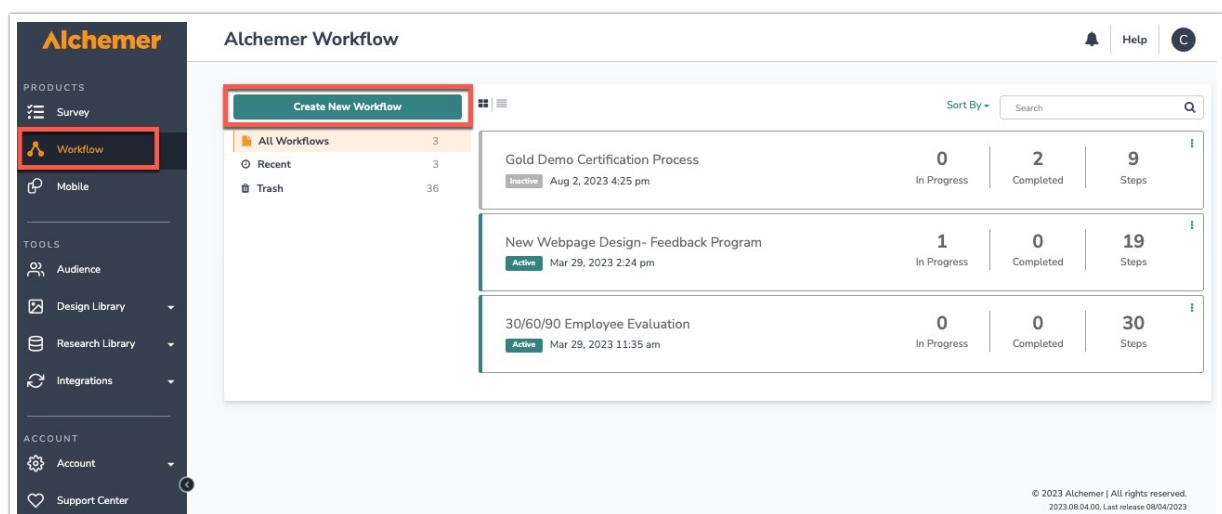
With Marketo and Alchemer, you and your team can:

- Initiate Workflows in Alchemer after events occur in Marketo Smart Campaigns.

> The Marketo initiator uses webhooks. For detailed instructions on Marketo webhooks refer to the following Marketo articles:
> - Webhooks Overview
> - Create a Webhook
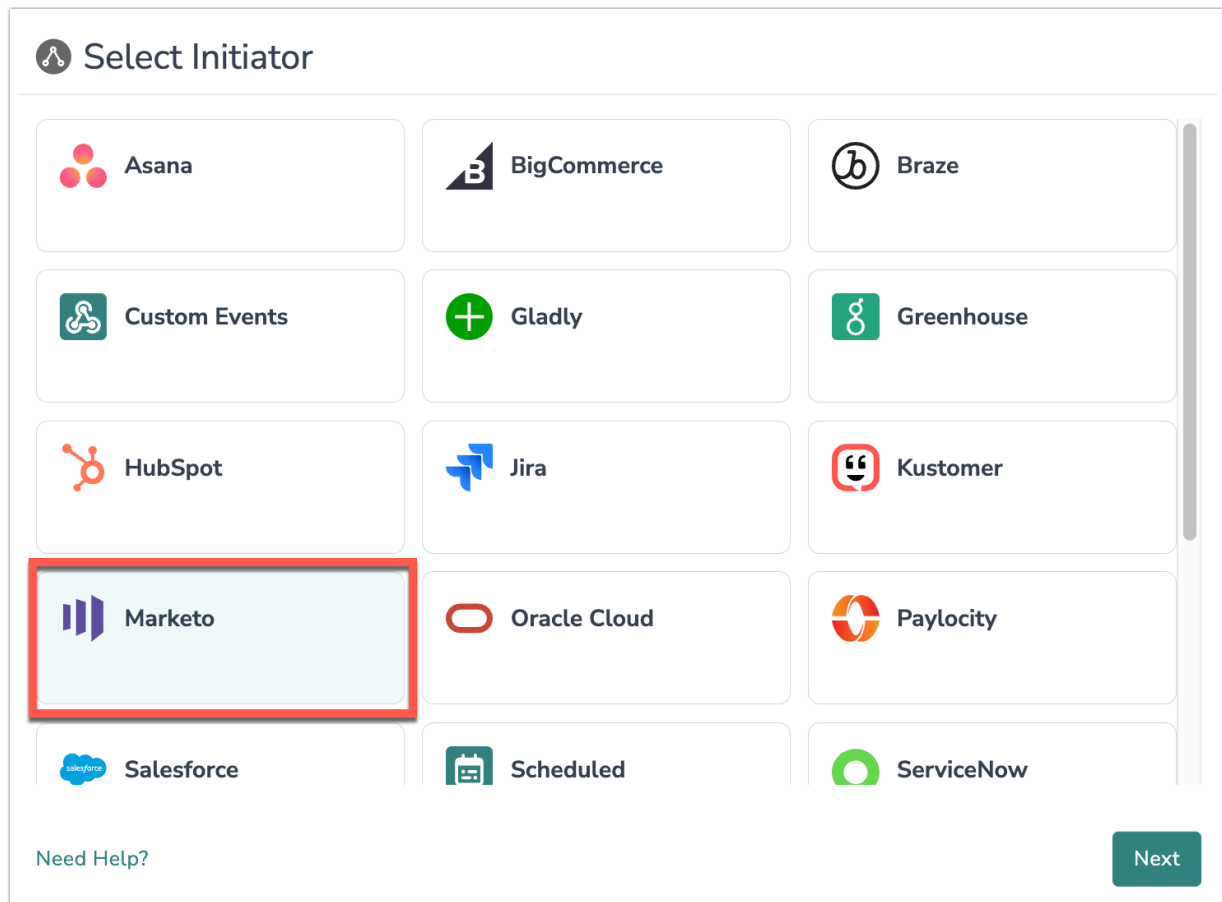> - Use a Webhook in a Smart Campaign
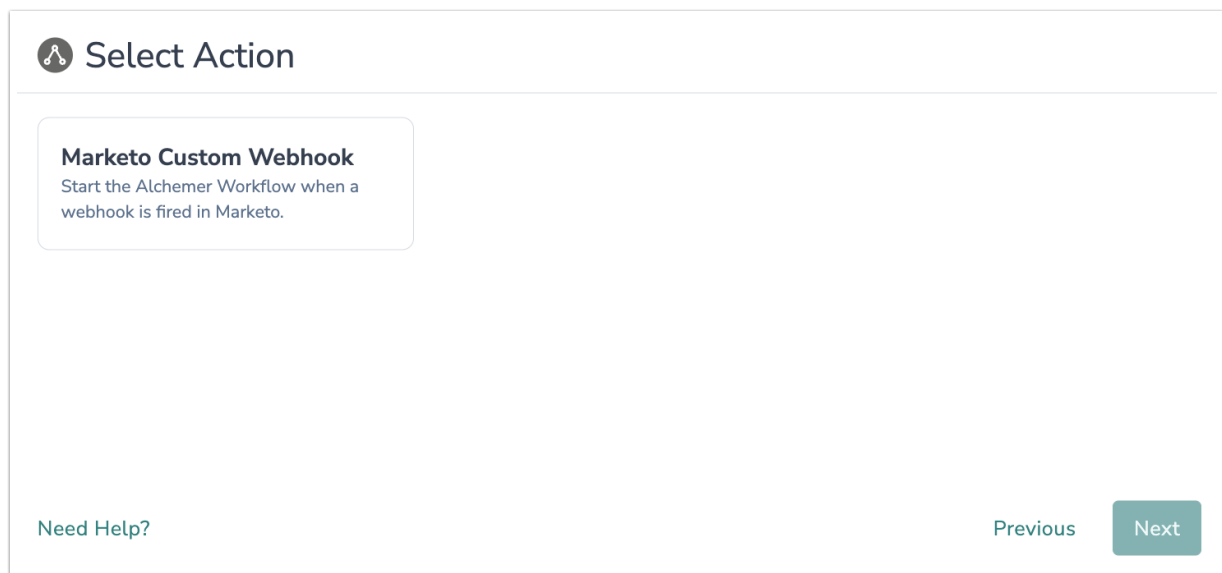
Setup

1. Create a new Workflow.

2. Name your Workflow.

3. After creating a new Workflow, select Marketo as your Workflow initiator.

4. Select Marketo Custom Webhook then click the "Next" button.

5. Click the "Next" button on the initiator overview screen.

Configure Initiator

Marketo | Custom Webhook

Start a new Workflow run when a webhook is fired from Marketo.

ⓘ Proceed to the next step to configure your initiator.

Previous   Next

6. Copy the public URL provided by Alchemer. You will need this URL to configure the webhook in Marketo.

Configure Initiator

Marketo | Custom Webhook

Webhook URL

Set the webhook URL in Marketo to this endpoint.

Learn more

In your Marketo webhook:

- Set the URI to the URI above
- Select POST as the Request Type
- Select None as the Response Type
- Add a JSON template with the variables you want to pass to the Alchemer Workflow

Public URL

https://le4c85de-b8af-48b5-ba6-763b40fk91c.trayapp.io

Custom Fields

Add Custom Fields to define the fields this webhook should accept. Fields can be passed as any combination of query
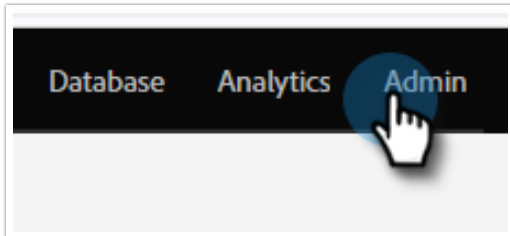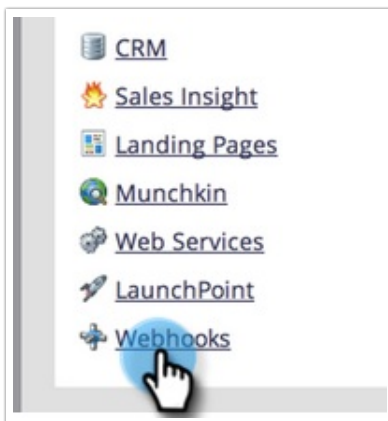
Previous   Save

7. In your Marketo account, navigate to the Admin area. Before using webhooks in Marketo Smart Campaigns, you need to first create the webhook.

For additional information on creating webhooks in Marketo, refer to their documentation.

8. Click **Webhooks**.

9. Click New Webhook.

10. Name and configure your webhook.

- In the URL field, paste the URL provided by Alchemer in Step 6.
- If you wish to transmit information in the body of the request, enter that via the Template field. Example JSON body:

```
{
"email": "insert value",
"last_name": "insert value"
}
```

The fields included in the JSON body will also need to be defined in Alchemer, see Step 15 for details.

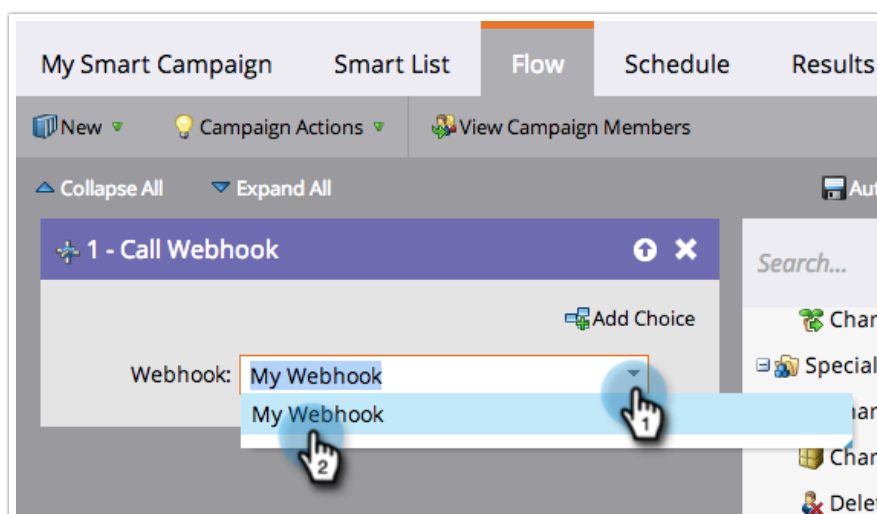- Select JSON as the Response Type.

11. When done, click "Create". Now that you've completed the webhook, you need to add it to a Marketo Smart Campaign.

12. In a new or existing Smart Campaign, navigate to the Flow tab and drag in a Call Webhook flow action.
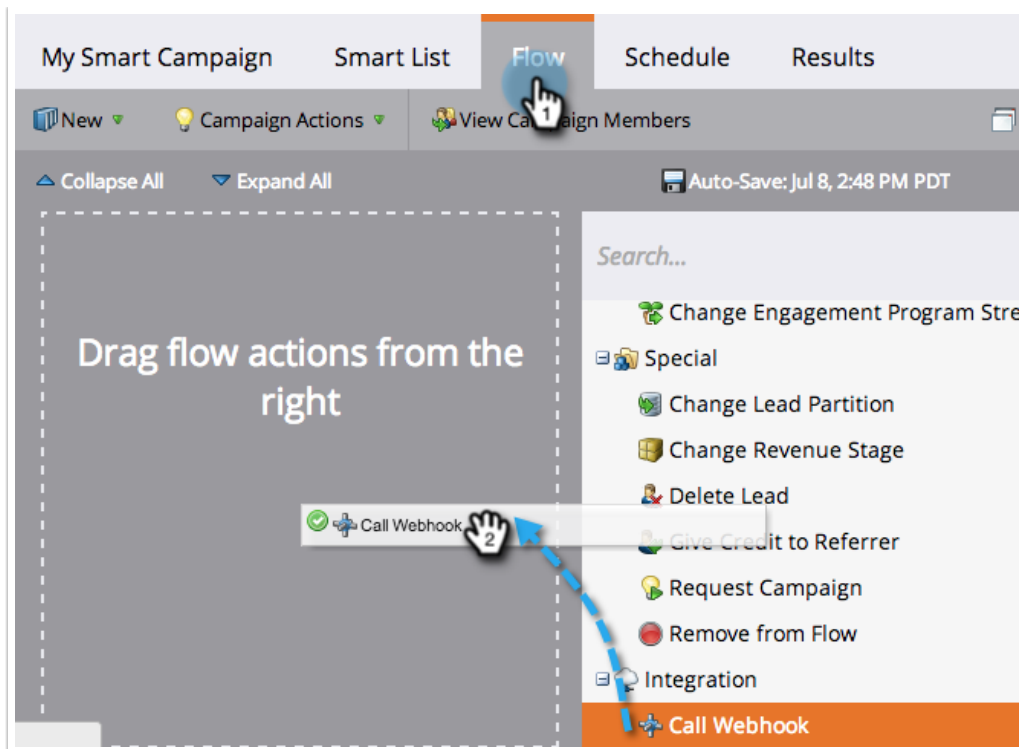
13. Select the new webhook you just created.

14. Now that the webhook has been created and added to a Smart Campaign, return to Alchemer Workflow.

15. In Alchemer, add the custom fields that you'd like Alchemer to accept. These fields can be used as merge codes in subsequent Workflow steps. When done, click "Add to Custom Fields".

> The fields added in Alchemer must exactly match the fields you added to the body of the webhook request.

- Add a JSON template with the variables you want to pass to the Alchemer Workflow

Public URL

https://c..trayapp.io

Custom Fields

Add Custom Fields to define the fields this webhook should accept. Fields can be passed as any combination of query parameters and/or as JSON in the body of a POST request.

Custom Fields(optional)

0

last_name

1

email_address

Add to Custom Fields

Previous   **Save**

16. Click "Save" to complete initiator configuration.

Merge Codes

When the webhook fires, Marketo will pass any custom fields to Alchemer Workflow. After configuring this initiator, you can use these fields in merge codes, logic, and other Workflow features.

For more information on how to use these merge codes in your Workflow, check out this article.

FAQs

▷ **What permissions do I need within Alchemer to set-up and use the Marketo initiator?**

▷ **Can multiple Workflows initiate off the same Marketo initiator?**

▷ **This initiator doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!**

Related Articles