



Getting Started

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Refer to it as **Marketo V2** in the [Integrations object](#)

Components

Browser Server

Connection Modes

Device-mode	Cloud-mode
<input checked="" type="checkbox"/> Web	<input checked="" type="checkbox"/> Web
<input type="checkbox"/> Mobile	<input checked="" type="checkbox"/> Mobile
<input type="checkbox"/> Server	<input checked="" type="checkbox"/> Server

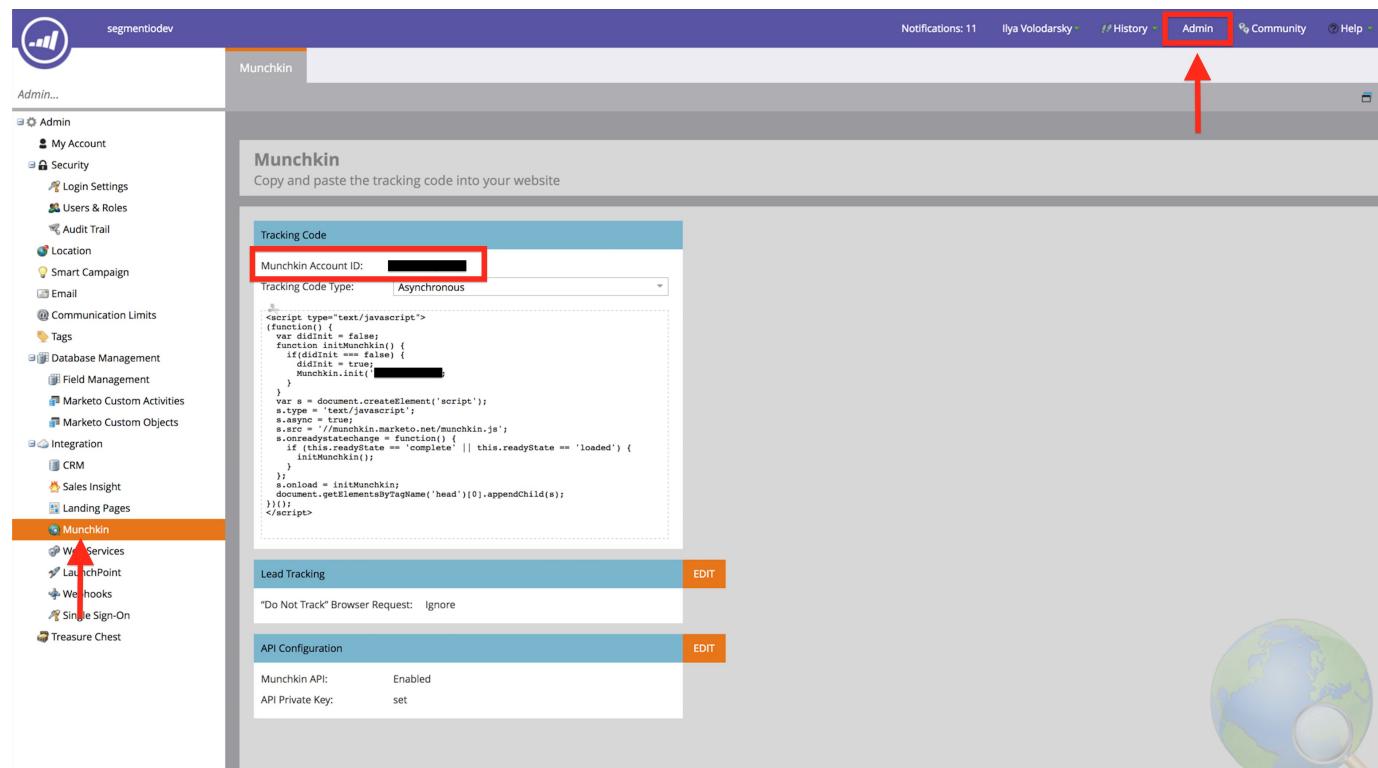
Getting Started

To start sending data to Marketo, there are two things you must do. **Both of these steps require that you to log in with the Admin Marketo Account.**

Enter your Marketo Credentials into your Destination settings

We'll need your Munchkin Account ID, Client Secret, and Client ID.

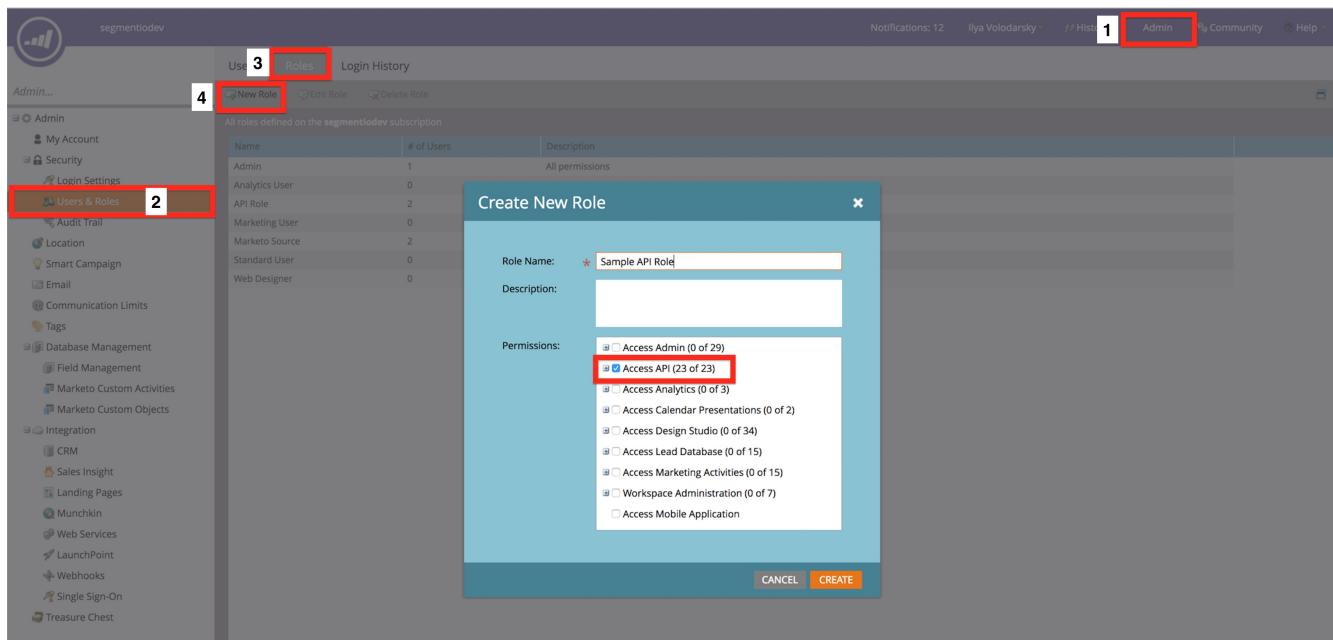
To get your Munchkin Account ID [login to your Marketo account](#), click Admin in the top right corner, then click Munchkin on the left side bar.



To get your Client Secret and Client ID, you must create a role that has full API access, an API only user, and then create a Service in Marketo.

To create a role with full API access:

- 1 Click **Admin** in the top right corner.
- 2 Click **Users & Roles** on the left side bar.
- 3 Click on the **Roles** tab.
- 4 Click **New Role**. Name your role and check the API Access box to assign the user full API access. Click Create.

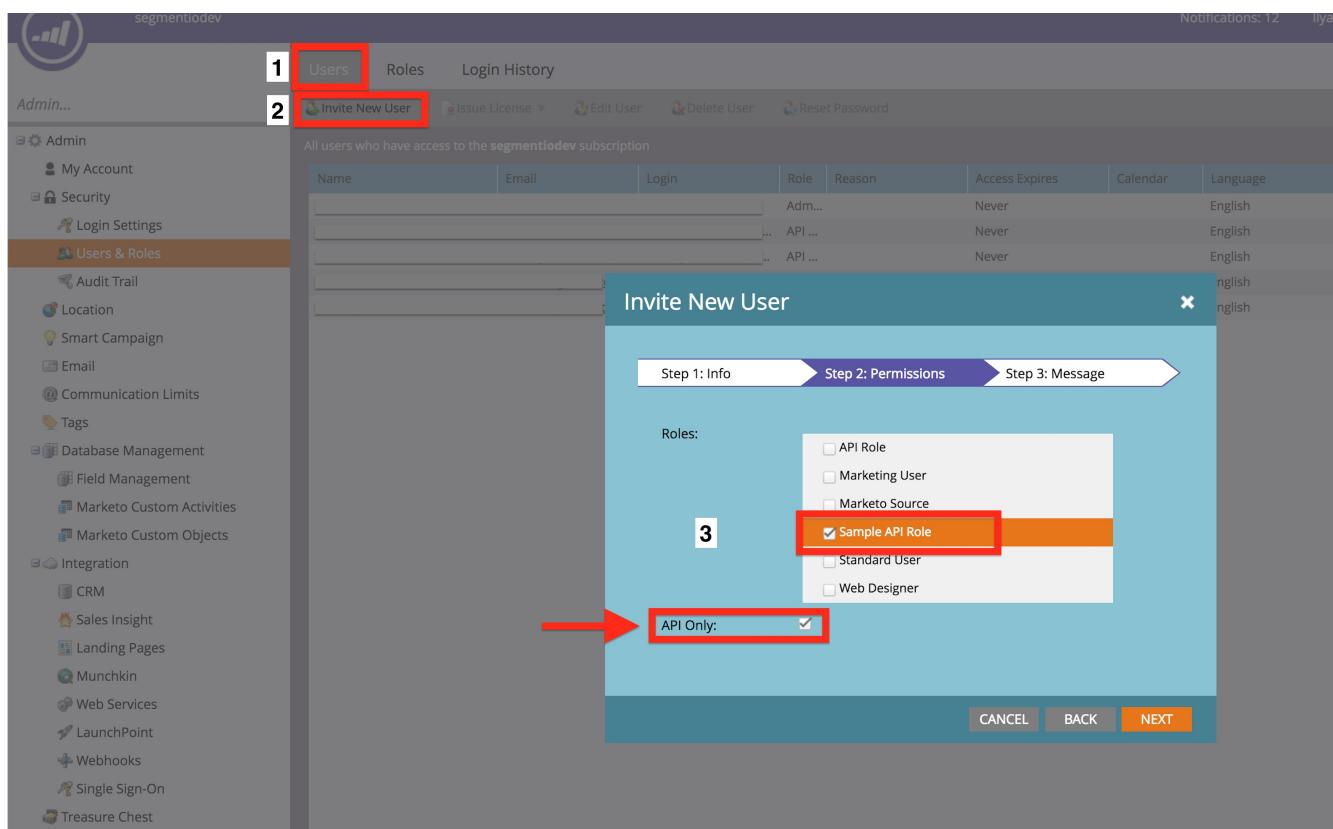


Now that you've created an API role, you have to assign that role to an API only user.

1Click the Users tab.

2Click Invite New User and fill out the necessary information in Step 1.

3Assign the new role you created to this user in Step 2 and check the API Only box. Click next then Send.



Next, create a Service and get Client Secret and Client ID from that Service.

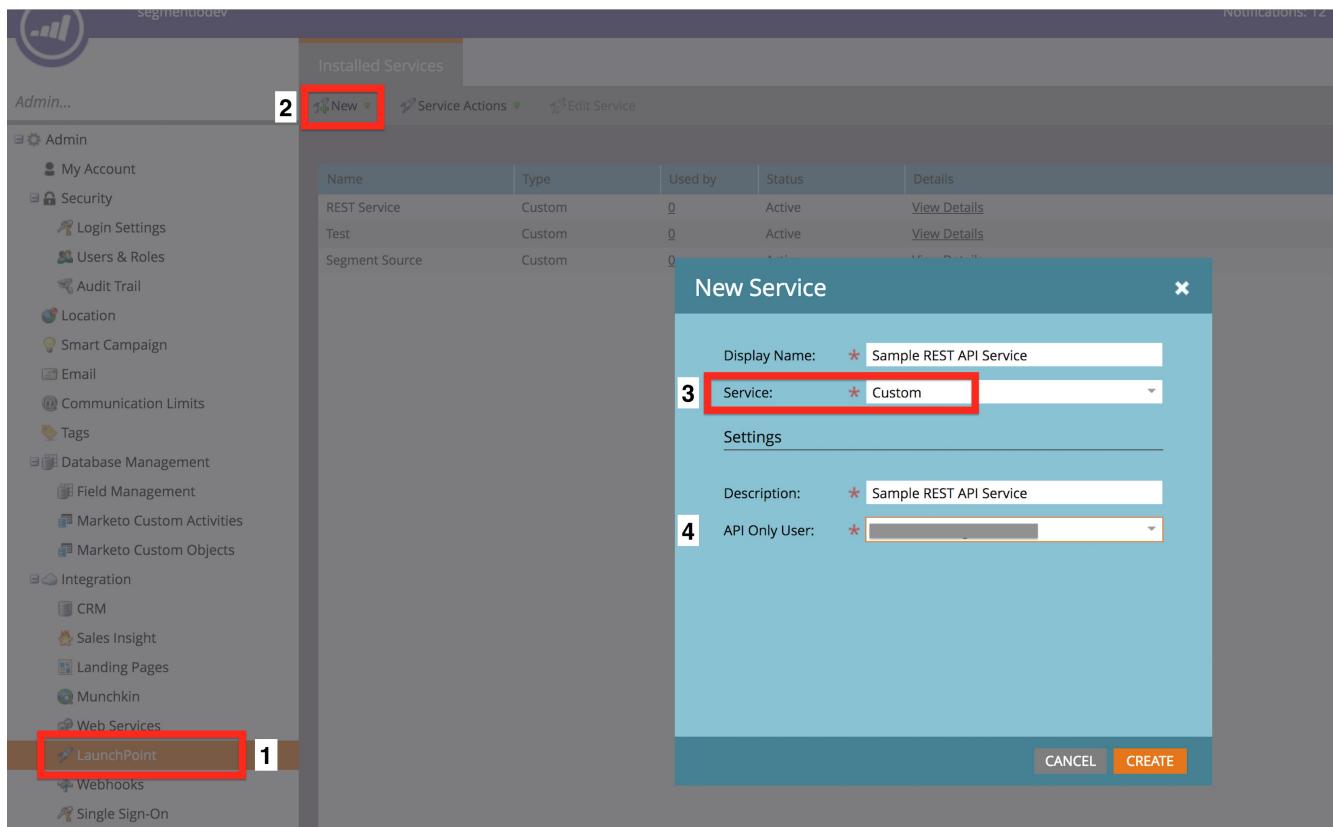
1Click LaunchPoint on the left side bar.

2Click New and then New Service from the drop down.

3Select Custom for the Service from the drop down.

4Select the new API Only user you invited. This User must be an API Only user **and** be assigned a role that has

full API access.



5 Click View Details on the new service that you've created and a small window will display with your Client Secret and Client ID. Copy and paste them into your Destination's Settings.

Installed Services					
New		Service Actions		Edit Service	
Name	Type	Used by	Status	Details	
REST Service	Custom	0	Active	View Details	
Test	Custom	0	Active	View Details	
Segment Source	Custom	0	Active	View Details	
Sample REST API Service	Custom	0	Active	View Details	

Create a User ID and an Anonymous ID field in Marketo

1 Click Admin in the top right corner.

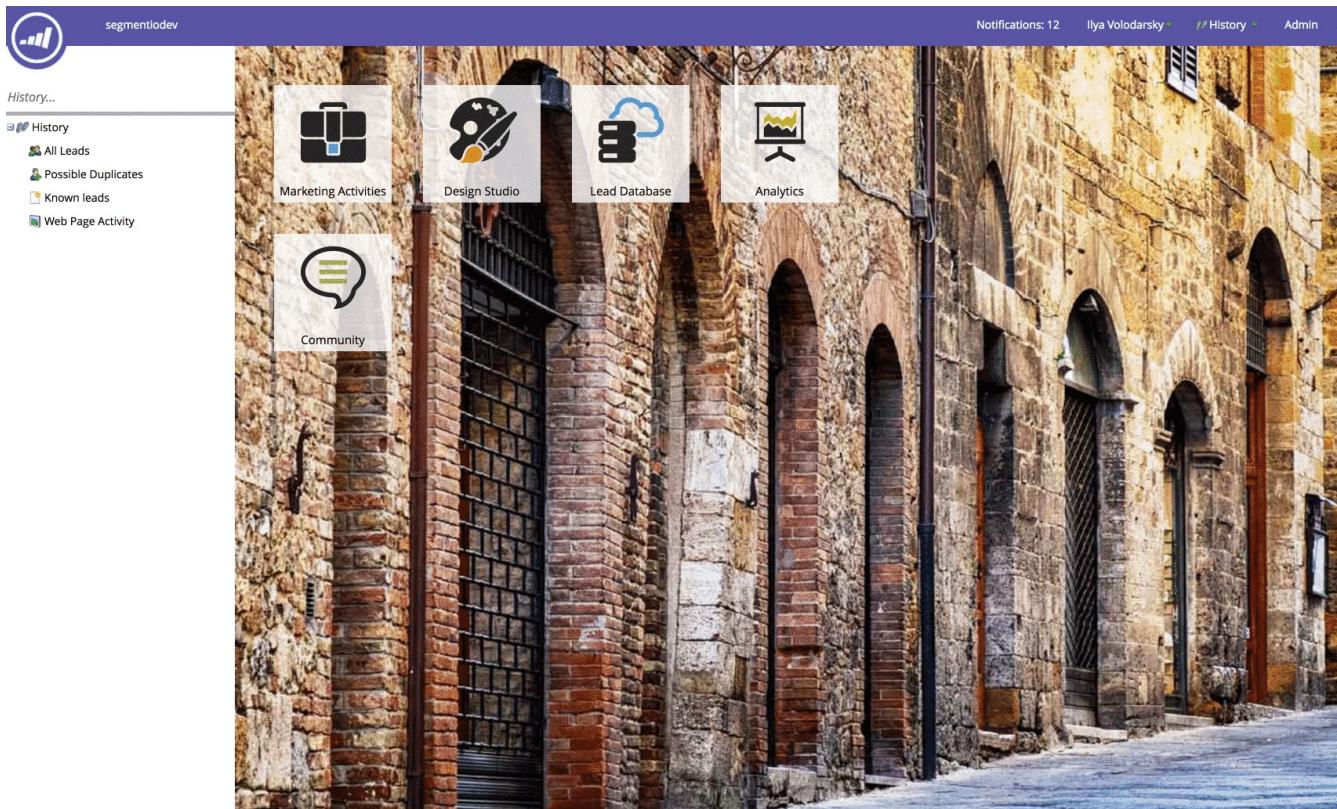
2 Click Field Management on the left side bar.

3 Click New Custom Field.

4 Select String as the type.

5 Name the field whatever you'd like.

6 Set the API name to `userId` for the user ID field and then `anonymousId` for the anonymous ID field. **Important:** The API names for the user ID and anonymous ID fields must be `userId` and `anonymousId` exactly. If anything in the API name is different, the destination will not work.



Identify

Cloud-mode

When you call `Identify` in Cloud-mode, Segment uses [Marketo's REST API](#) to create and update leads server-side.

Device-mode

When you call `Identify` in Device-mode, Segment uses [Marketo's Background Form Submission](#) to create and update leads client-side.

There are additional steps you must take to send `.identify()` calls in Device-mode.

1 Create an empty form in Marketo. This form will always be hidden and can remain empty as long as the traits you need downstream are mapped in the **Marketo Custom Fields** Destination setting.

2 Put the associated **Marketo Form ID** and **Marketo Form URL** in your Marketo V2 Destination settings. This information can be found in Form Actions > Embed Code in the Marketo Design Studio:

The screenshot shows the Marketo Design Studio interface. On the left, there's a sidebar with categories like Default, Email Templates, Emails, Forms, Global Forms, Segment-Form, Archive, Images and Files, Landing Page Templates, Landing Pages, and Snippets. The main area is titled 'Segment-Form'. Below it, there's a summary card with 'Status: Approved with draft', 'Type: Form', 'Created: September 2, 2021 4:35 PM PDT by Marin Alcaraz', and 'Used By: None'. A modal window titled 'Embed Code' is open, showing the following code:

```

<script src="//app-ab28.marketo.com/js/forms2/js/forms2.min.js"></script>
<form id="mktForm_1003"></form>
<script>MktoForms2.loadForm("//app-ab28.marketo.com", "879-BAR-685", 1003);</script>

```

Two red arrows highlight specific parts of the code: one points to the 'Form ID' (mktForm_1003) and another points to the 'Form URL' (//app-ab28.marketo.com).



Marketo Form ID and **Marketo Form URL** are **required** fields for the Marketo SDK to initialize on your site. If these fields are left blank, the SDK will not initialize and data will not be sent downstream.

Traits

Regardless of connection mode, we'll map the following spec'd Segment traits to Marketo's standard fields:

SEGMENT TRAITS	MARKE TO STANDARD FIELDS
address.city	City
address.country	Country
address.zip	Postal Code
address.state	State
birthday	Date Of Birth
company	Company
email	Email
firstName or name	First
gender	Marketo Social Gender
lastName or name	Last
phone	Phone

Here is a sample JavaScript Identify call with the all the standard traits:

```
analytics.identify('1234', {  
  firstName: 'Robyn Rihanna',  
  lastName: 'Fenty',  
  email: 'rihanna@example.com',  
  gender: 'woman',  
  phone: '555-555-5555',  
  company: 'Segment.com',  
  birthday: '1988-02-20T00:00:00.000Z',  
  createdAt: '2007-05-31T00:00:00.000Z',  
  address: {  
    city: "Eugene",  
    country: "USA",  
    postalCode: "97405",  
    state: "Oregon"  
  }  
});
```

If you'd like any other traits from your `.identify()` call to update a field in Marketo, you must create custom fields in Marketo and map them in the **Marketo Custom Fields** Destination setting.

[← Back to Destination](#) **Edit Settings** [Save](#)

Use these fields for Marketo Lead fields that you'd like mapped to your Segment Identify Traits.

Segment Trait Name ×

Our Marketo integration allows you to map your Identify traits to Lead fields in Marketo. This is case sensitive so make sure the name matches exactly how you are passing it in your `.identify()` call.

Marketo Field Name

Enter a Marketo Field name. Make sure to copy and paste the REST API name exactly.

Marketo Field Type

Boolean ▼

The Marketo Field type for this trait.

Add Another segmentTrait

Segment Trait The name of the trait sent in your `.identify()` call.

Marketo Field Name. The Marketo REST API name for the field. To get the REST API name for your fields in Marketo, click Field Management, then Export Field Names. A spreadsheet will download and the first column is the REST API name for your Marketo fields. **Make sure to copy and paste the REST API name exactly.**
This is case sensitive.

Marketo Field Type. When you are in Field Management, click on the field name in the bar on the right and you'll see the field type.

The screenshot shows the Marketo Field Management interface. On the left, there's a sidebar with various administrative and database management options. The 'Field Management' option is highlighted with a red box and an arrow pointing to it from the left. In the main content area, a custom field named 'hasRing' is displayed. The 'Type:' field is highlighted with a red box and an arrow pointing to it from the left. The value 'Boolean' is shown. To the right of the field list, there's a search bar labeled 'Search...' and a list of other field names, also with a red box and an arrow pointing to it from the left. The field 'hasRing' is highlighted in the list.

Note: Custom address traits must go in the top level traits object, not in the address object.

Track

When you call `Track`, Segment maps the event to a pre-defined [Marketo Custom Activity](#). There are two important things to note when sending `.track()` calls to Marketo:

You **must** map them to your Marketo Custom Activities in your Destination Settings. If you do not map a track call to a Custom Activity in your Destination Settings, we will not send the event to Marketo to help limit the amount of API calls made to Marketo.

You **must** either:

- Enable [Cloud-mode](#)

- Enable [Device-mode](#) and enable the [Send Track Events Server Side](#) setting

- Send track events from one of our [server side libraries](#)

Here is a sample Ruby `.track()` event:

```
Analytics.track(
  event: 'Segment Event',
  properties: {
    firstName: 'Alex'
  }
)
```

Segment Event Name

Enter the Segment Event Name.

Marketo Custom Activity ID

Enter the Marketo Custom Activity ID.

Segment Property Name

Enter the Segment Property Name.

Marketo Field Name

Enter the Marketo Field name.

Marketo Field Type



Enter the Marketo Field type.

Set as Primary Key

Mark this property as the Primary field in Marketo.

 Add Another segmentProperty

Segment Event Name. Your Segment Event name.

Marketo Activity ID. When you are in [Marketo Custom Activities](#), click on the Marketo Activity in the right side bar that you'd like to map your Segment Track event to. Copy and paste the ID into your Destination Settings.

Market Custom Activities Fields Used By

Noonan Custom Activity

Details	
Id:	100001
Display Name:	Noonan Custom Activity
API Name:	noonanCustomActivity_c
State:	Approved
Description:	
Filter:	Purchased
Message:	Purchase

Used By

- Market Custom Activities
- Noonan Custom Activity
- Noonz Custom Activity 2

Segment Property Name. The name of the property in your `.track()` call. This is case sensitive so make sure the name matches exactly how you are passing it in your `.track()` call.

Marketo Field Name. The name of the Marketo Attribute for your Custom Activity. The Attribute names for a given Custom Activity can be found in the Fields tab of Marketo Custom Attributes. Click on the Custom Activity in the right side bar and a list of your Attributes for that Custom Activity will appear. **Make sure to copy and paste the API Name for your field exactly as it appears in Marketo. This is case sensitive.**

Market Custom Activities Fields Used By

Name	API Name	Description	Data Type
Product Name	productName		string
Test Field	testField		string

Used By

- Market Custom Activities
- Noonan Custom Activity
- Noonz Custom Activity 2

Marketo Field Type. The type of the Marketo Attribute. The Attribute type can be found in the Fields tab of Marketo Custom Attributes. Click on the Custom Activity in the right side bar and a list of your Attributes for that Custom Activity will appear.

Market Custom Activities Fields Used By

Name	API Name	Description	Data Type
Product Name	productName		string
Test Field	testField		string

Used By

- Market Custom Activities
- Noonan Custom Activity
- Noonz Custom Activity 2

Primary Field. When creating a Custom Activity in Marketo, you have to set a Primary Field. If you are

unsure which field was set as the primary field, when you are looking at the list of fields for your Custom Activity in Marketo, there will be a red star next to your Primary Field.

Name	API Name
Product Name	productName
Test Field	testField



You can't map fields nested in objects as Marketo Custom Activity property names. You must flatten any objects you may need to access data from either before you send it to Segment, or while using an [Insert Function](#).

Page

When you call `Page`, Segment uses [Marketo's Munchkin.js](#) `visitWebPage` method. The URL is built from your `.page()` event and properties object into the form Marketo expects, so no need to worry about doing that yourself.

Marketo's `visitWebPage` method requires a URL and a user agent. Any calls that are missing either of these fields will not be sent to Marketo. User agent is automatically collected Client-side but if you are sending `.page()` calls from the server, make sure to set the user agent.

Here is a sample Node `.page()` event:

```
analytics.page({
  userId: '019mr8mf4r',
  category: 'Docs',
  name: 'Node.js Library',
  properties: {
    url: '/docs/connections/sources/catalog/libraries/server/node',
    path: '/docs/connections/sources/catalog/libraries/server/node/',
    title: 'Node.js Library - Segment',
    referrer: 'https://github.com/segmentio/analytics-node'
  },
  context: {
    userAgent: "Mozilla/5.0 (Macintosh; Intel Mac OS X 10_9_5) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/40.0.2214.115 Safari/537.36"
  }
});
```

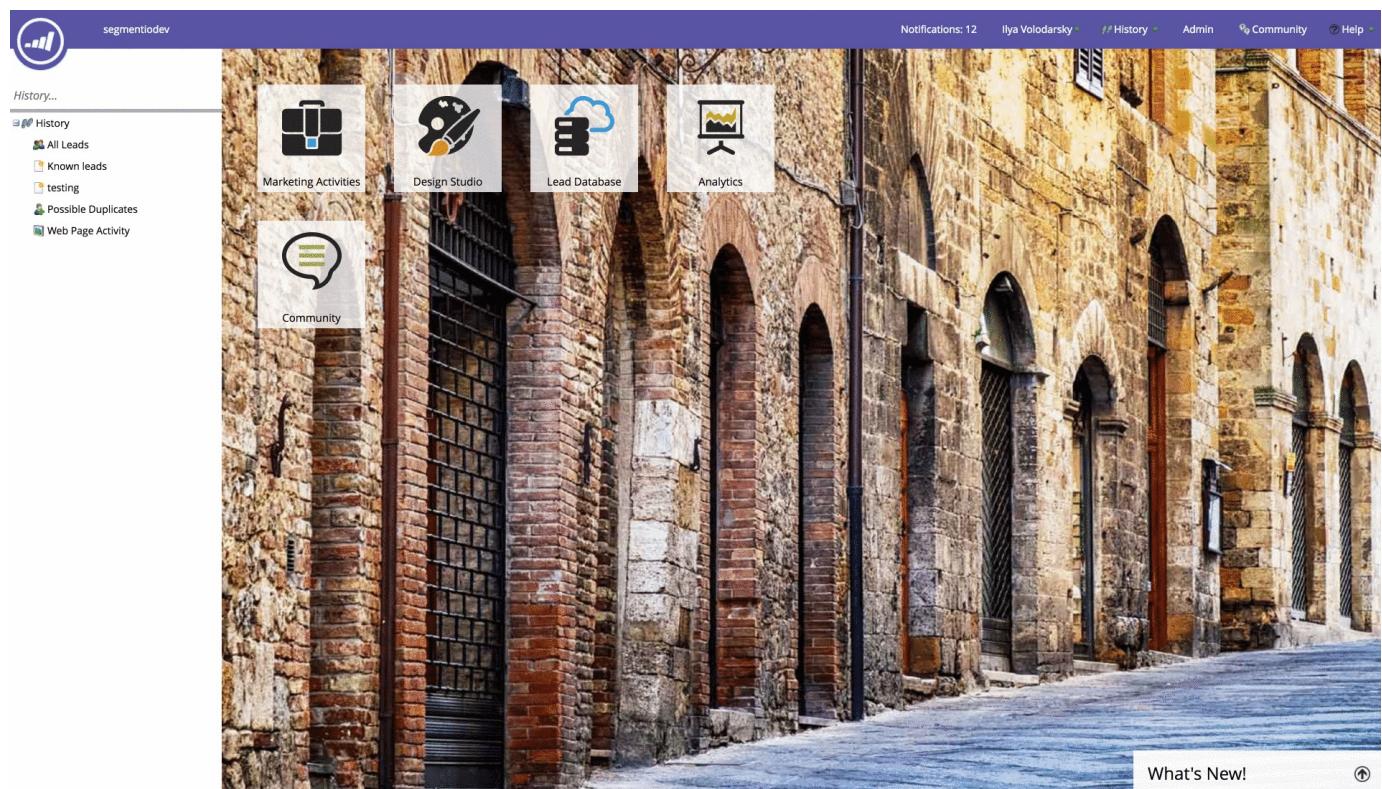
Tracking Anonymous Activity in Marketo

If you would only like to track known users in Marketo, set your Track Anonymous Activity setting to false. There are a couple things to note when this setting is false:

Any call without a User ID will be rejected.

No anonymous activity will be sent to Marketo. Even after the user becomes known, none of their previous anonymous activity will be sent to Marketo.

If you'd like to track anonymous activity but don't want to have to parse through or view unknown leads, Marketo lets you create Smart Lists that will filter your leads (i.e. if you'd only like to view leads that have a user ID or an email). To do this, when you are in your Lead Database, click All Leads, then New. From the drop down, click New Smart List. Select the folder you'd like the Smart List to live in. After you've created the Smart List, select what field you'd like to filter by on the right side bar, drag it to the filters and then select what you'd specifically like to filter by for that field.



Marketo API Limits

We do our best to limit the amount of API calls that we are making to Marketo but if you are hitting your 50k/day limit, we'd recommend only sending events to Marketo that you need. To prevent an event from being sent to Marketo, you can select destinations by doing the following:

```
analytics.identify({
  userId: '97234974',
  traits: {
    firstName: 'Alex'
  },
  integrations: {
    'Marketo V2': false,
    'Google Analytics': true
  }
})
```

Hybrid Device/Cloud-mode

Another option is to use Marketo in [Device-mode](#) (assuming you are tracking events from a Website). Marketo does not limit API calls that originate from their Web SDK but it also only supports capturing Identify and Page events. If you would also like to capture Track events, you can choose to have these be routed through our server-side integration.

To enable this "Hybrid" mode, select the [Send Track Events Server Side](#) setting and follow the instructions for

mapping [Track](#) events defined above.

Preventing Duplicate Leads

Marketo allows you to upsert leads based on any field. We use email and userId as well as anonymousId if you are tracking anonymous activity. We will first use email since that is the field Marketo recommends is unique for your leads. However, many `.track()` and `.page()` calls don't include an email address so then we will use the `userId` or `anonymousId` passed in your `.track()` and `.page()` calls to associate these events to leads in Marketo.

You can do one of the following to prevent duplicate leads:

Recommended: Upload a CSV adding your userId to all your leads in Marketo **before** enabling the destination. After you [create the user field](#) in Marketo, you can upload a list of all your users with an email column and a userId column. Your CSV should look like this:

EMAIL	USERID
alex@email.com	ABC1234
natasha@email.com	XYZ9876

To upload a list to Marketo, when you are in Lead Database, click All Leads. Then click "New", then "Import List" from the drop down. Select your CSV, then click "Next". Make sure "Email Address" and "userId" are the Marketo Fields selected then click "Next". Name your list or select a pre-existing list. Select "None" for Acquisition Program. Then Click "Import".

1 Manually merge leads in Marketo. Follow [these instructions to merge](#) any duplicate leads found in Marketo after enabling the destination.

2 Make sure to call identify first. This is already a recommended best practice as [part of our spec](#).

3 Pass an email in your `.track()` and `.page()` calls.

Migrating from Marketo to Marketo V2

There are a few necessary steps that have to be taken to migrate from Segment's legacy Marketo v1 destinations, to Marketo V2.

Important: Make sure you disable Marketo once you are done getting set up with Marketo V2. If you leave both enabled, there will likely be duplicate data in your Marketo account.

1 Your Marketo credentials in your Segment Destination settings need to be updated. Our Marketo Destination used Marketo's SOAP API and Marketo V2 uses Marketo's REST API which requires different credentials. Check out the [Getting Started](#) guide for what credentials you'll need.

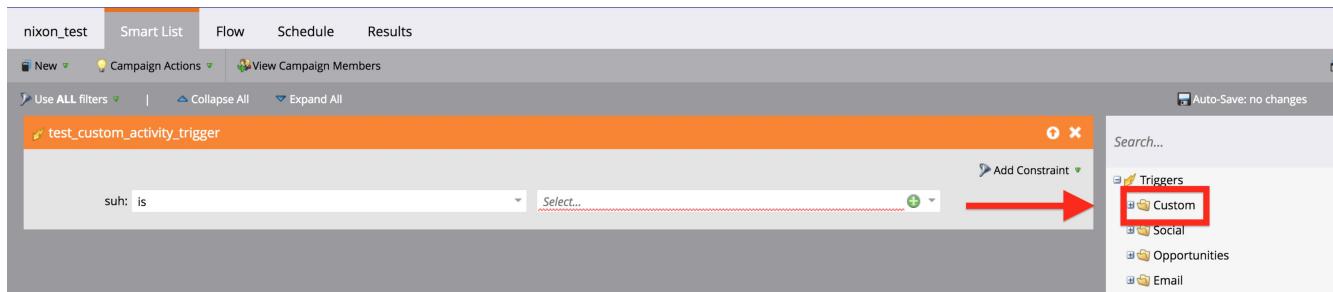
2 Two custom fields must be created in Marketo: userId and anonymousId. Check out [Getting Started](#) for exact details on how to create these custom fields in Marketo.

3 Track calls must be mapped in your Destination settings. Our Marketo Destination sent track calls as a Munchkin Visit WebPage event in Marketo. In Marketo V2, we'll send your track calls to your Marketo Custom Activities. Detailed instructions [in the Track section of this page](#).

4 If there are any custom Lead fields that you'd like sent to Marketo in your Identify calls, you must create custom fields in Marketo and add them in your Destination settings. In addition, if you are connecting Marketo V2 in Device-mode, an empty form must be created in Marketo to create and update leads. Detailed instructions [in the Identify section of this page](#).

5 Update anything in Marketo that rely on the way V1 sends `.track()` events to be triggered by your custom activities. For example, our V1 Marketo destination sent track events as a "Visit Web Page" event with `/event/<your_event_name>`. So if you a workflow that is triggered by a "Visit Web Page" event where the web

page contains `/event/<your_event_name>`, you'll have to swap out the "Visit Web Page" event trigger you have with your Custom Attribute Trigger. In the right side bar, click the "Custom" folder under "Triggers" and select the trigger that you set for your custom activity:



To figure out what the trigger name for that Custom Activity is, navigate to the admin section of Marketo > Marketo Custom Activities > Click on your activity from the side bar and you'll see the trigger name:

A screenshot of the Marketo Admin interface. The left sidebar shows various admin sections like 'Admin...', 'My Account', 'Security', etc. The 'Marketo Custom Activities' section is highlighted with a red box. The main content area shows a 'Test Custom Activity' detail page. The 'Details' section lists the following fields:

Id:	100003
Display Name:	Test Custom Activity
API Name:	testCustomActivity_c
State:	Approved
Description:	
Filter:	test_custom_activity
Trigger:	test_custom_activity_trigger

The 'Trigger:' field is highlighted with a red box.

When enabling Marketo V2, because of the way Marketo's API works, there is potential to create duplicate leads, especially when the first enabling the destination. For ways to prevent this, check out the Preventing Duplicate Leads.

Send a single source's data to multiple Marketo V2 workspaces

Segment doesn't support multiple instances of Marketo V2 for any source in Segment (for both Device-Mode and Cloud-Mode). If you need a single source's data sent to multiple Marketo V2 workspaces, follow the instructions on configuring a [Repeater destination](#) to route your source's data through the Repeater destination

into a new source and new Marketo V2 destination instance. To create a Repeater destination, new source, and second Marketo V2 destination:

1 Create and connect a new [Repeater destination](#) to your source and select the intended source.

2 Click **Add destination**, name the destination, and select Fill in settings manually.

3 Create a new source, then navigate to **Settings > API Keys** and copy the **Write Key** value.

From the Repeater destination's **Settings** page, you'll find **Write Keys** in the **Connection Settings**. This is where your second source's write key from step 4 will go.

4 Navigate back to your Repeater destination and paste in the source's `writeKey` into the write key setting.

5 Add a Marketo V2 destination to your new source with the desired configuration settings.

6 Enable the Repeater destination, new source, new Marketo V2 destination.

You'll begin seeing data transmitted from your originating source to the Repeater Destination (Event Delivery), then to the new source (Debugger), and finally to the Marketo V2 destination (Event Delivery).

Engage

You can send computed traits and audiences generated using [Engage](#) to this destination as a **user property**. To learn more about Engage, schedule a [demo](#).

For user-property destinations, an [identify](#) call is sent to the destination for each user being added and removed. The property name is the snake_cased version of the audience name, with a true/false value to indicate membership. For example, when a user first completes an order in the last 30 days, Engage sends an Identify call with the property `order_completed_last_30days: true`. When the user no longer satisfies this condition (for example, it's been more than 30 days since their last order), Engage sets that value to `false`.

When you first create an audience, Engage sends an Identify call for every user in that audience. Later audience syncs only send updates for users whose membership has changed since the last sync.



Real-time to batch destination sync frequency

Real-time audience syncs to Marketo V2 may take six or more hours for the initial sync to complete. Upon completion, a sync frequency of two to three hours is expected.

Settings

Segment lets you change these destination settings from the Segment app without having to touch any code.

SETTING	DESCRIPTION
Munchkin Account ID <i>(required)</i>	<code>string</code> . You can find your Account ID under Admin > Integration > Munchkin > Tracking Code in your Marketo account .
Track Anonymous Activity	<code>boolean</code> , defaults to <code>FALSE</code> . Cloud Mode Only: Our Marketo Integration allows you to choose whether you'd like to track anonymous Leads in Marketo. If you don't want to track anonymous Leads in Marketo, you must pass a User ID in your event.
Send Track Events Server Side	<code>boolean</code> , defaults to <code>FALSE</code> . Applicable only if you are using Marketo in Device Mode. This setting will route all of your Track events through our server-side integration with Marketo's REST API. Page and Identify events will still be sent using our client side integration with the Marketo JavaScript SDK.
Client ID <i>(required)</i>	<code>string</code> . Your Marketo REST API Client ID.

SETTING	DESCRIPTION
Client Secret <i>(required)</i>	<code>string</code> . Your Marketo REST API Client Secret.
Marketo Custom Activities	<code>mixed</code> , defaults to . Cloud Mode Only To send track calls to Marketo, you must either be in Cloud Mode or send track events from one of our server side libraries. Use these fields to map your Segment track event names to Marketo Custom Activities. We'll only send events that you specify.
Marketo Form ID	<code>string</code> . Device Mode Only : The ID of the form you will use to capture your Segment Identify traits. You can find the form ID under Design Studio > Forms > Select Form > Form Actions > Embed Code . Only include the digits after <code>mktoForm_</code> .
Marketo Form URL	<code>string</code> . Device Mode Only : The URL of the form you will use to capture your Segment Identify traits. You can find the form URL under Design Studio > Forms > Select Form > Form Actions > Embed Code . It will be the first argument in the <code>MktoForms2.loadForm</code> script, starting with <code>//</code> . Please include the entire URL including the <code>//</code> .
Marketo Custom Fields	<code>mixed</code> , defaults to . Use these fields for Marketo Lead fields that you'd like mapped to your Segment Identify traits.

This page was last modified: 17 Dec 2024

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