Integrating Informatica’s SMS Text Messaging API Into Marketo
Step by Step Using “Webhooks”
Table of Contents

Introduction .................................................................................................................. 2
Step 1: Configure the Webhook ...................................................................................... 2
Step 2: Create the Form .................................................................................................. 6
Step 3: Create the Smart Campaign ............................................................................... 8
Step 4: Create a Landing Page to Test Webhook ............................................................ 11
**Introduction**

Smartphones and other mobile devices are nearly ubiquitous, making SMS a powerful and easy way to communicate with your employees, partners, customers, and prospects. Using Marketo’s “Webhook” capabilities, Informatica’s SMS Mobile Messaging API enables immediate, tangible results for your mobile campaigns. The integrated solution supports carriers throughout the world, making text messaging an easy-to-use addition to any Marketo solution.

By using Marketo’s triggered campaigns and workflow capabilities alongside Informatica’s real-time, powerful SMS delivery capabilities, the possibilities are endless.

This document explains the Informatica SMS integration using the example of a text message notifying a salesperson’s mobile device of a new lead filling out a web form. You can use the SMS Webhook demonstrated within this example to create other use cases that make sense within your organization - you are certainly not limited to this one. There are four steps to setting up this example:

1. The Webhook must be configured to communicate with Informatica’s SMS API.
2. A form must be created. At this point, as the prospect data is collected, this form will trigger a “Smart Campaign” that will send the SMS message.
3. The Smart Campaign must be created and attached to the triggering business process, such as clicking on the Submit button of a created Web-to-lead form.
4. A test landing page needs to be created to check the new functionality. You can later insert your form into a real landing page.

In addition, you must have credentials from Informatica (a license key) to get the SMS message successfully delivered to the target mobile device. These can be obtained via subscription from Informatica at sales@strikeiron.com. Free trials are available.

**Step 1: Configure the Webhook**

The Marketo Web application communicates with Informatica using a “Webhook,” which uses the REST protocol to communicate with Informatica’s SMS API. REST, or Representational State Transfer, is a Web-based architecture for enabling different hardware and software platforms to communicate via a common text-based XML format.

Here is an example of a REST call that sends an SMS message using Informatica’s API:

```plaintext
```

You can test the above REST call by copying and pasting the information above into the address URL of any web browser such as Firefox, Google Chrome, or Internet Explorer. Be sure to edit the REST call information by supplying your Informatica license key obtained from Informatica and a working mobile number to get an actual message delivered. Do this by replacing the Strikelron_license_key field with your 18-22 digit license key, and replace the phone number listed after
“ToNumber=” with the mobile number you will be texting. Note that you need to only provide the recipient’s mobile number as well as the message text. There is no need to provide mobile carrier information since the service handles all of that in real-time when the service is invoked.

It is the various components of the above REST call that we will insert into the Marketo Webhook.

Note the question mark (?) in the middle of the actual REST call. This question mark separates the endpoint of the API (the URL where the API lives on the Internet, i.e. Informatica servers) from the parameters that are supplied along with the REST call.

Once logged into your Marketo account, go to “Admin.”
Within Admin, you will see the ability to “Manage Webhooks.” Click on “New Webhook.”
The following form will appear and allow you to create your SMS Webhook:

Use the following configuration for the SMS Webhook:

- **Webhook Name:** Use a name that will make sense in your campaigns. Here we’ve used a generic label, “SMS Notification,” but if you will have more than one SMS notification, you should be more specific.

- **Description:** Enter a description for your Webhook. This will help others who come in later to view your Webhook to know exactly its purpose.

- **URL:** This is the base URL for the Informatica REST call. Copy the following URL: http://ws.strikeiron.com/StrikeIron/SMSAlerts4/GlobalSMSPro/SendMessage

- **Request Type:** POST

- **Template:** Three parameters must be included here – License Key, To Number and Message Text.
Here is a sample of the template text:

LicenseInfo.RegisteredUser.UserID=XXXXXXXXXXXXXXXXXXXX&SendMessage.ToNumber=9191234567&SendMessage.MessageText=New Lead Notification -> {{lead.FullName}} email: {{lead.Email Address}}

- **LicenseInfo.RegisteredUser.UserID** – Informatica License Key. Replace the XXXXXXXXXXXXXXXXXX in this example with your Informatica license key.

- **SendMessage.ToNumber** – The phone number to which you want to send the SMS message. In this example, we have entered our sales representative’s mobile number directly. If you want to change this campaign to send an outgoing message to a lead, you could enter the token {{lead.Mobile Phone Number}} for the “To Number.” To include tokens in any part of the template section, move your cursor to the correct insertion place and click on “Insert Token” button. Choose the field that you wish to insert. Tokens indicate to Marketo to integrate actual lead data into the Webhook, as the field will be populated by the lead data for the record that triggers the invocation of the Webhook.

- **SendMessage.MessageText** – This is the content to be sent out via SMS. You can insert tokens within the message text to customize it per lead, as {{lead.FullName}} and {{lead.Email Address}} were entered above.

  - Request Token Encoding: None
  - Response Type: XML

The Webhook is now ready to be used by the Marketo system.
Step 2: Create the Form

Creating a form is a standard activity within Marketo. More information can be found within the Marketo help documentation. In “Design Studio,” click on “New” and create a “New Form”:

When the form is created, click on “Edit Form.” (You may be automatically taken to this screen upon creation, if you chose the “Open in Editor” option.)
Walk through steps 1-3 to create your form. Step 1 is to add field details to your form. Step 2 allows you to pick the theme and settings for your form. Finish and approve your form in Step 3.
Step 3: Create the Smart Campaign

This also is a standard activity within Marketo. More information can be found within the Marketo help documentation if necessary about creating Smart Campaigns.

Click on “Marketing Activities” and then “New” and “New Smart Campaign.” Give the campaign a name and decide which folder to store it in.
Next, click the “Smart List” tab. Drag the “Fills out Form” Trigger from the right to the white canvas, and then choose the form name that you created in step 2 (ours was Email Capture Form).
Move on to the next tab, “Flow.” Drag “Call Webhook” onto the white canvas and choose the “SMS Notification” Webhook created in Step 1.
Lastly, click on “Schedule” and “Activate” the Campaign. The campaign is now ready.

Step 4: Create a Landing Page to Test Webhook

This also is a standard activity within Marketo. More information can be found within the Marketo help documentation. Click on “New” and then “New Landing Page.”
When the landing page is created, click on “Edit Landing Page.” (You may be automatically taken to this screen upon creation, if you chose the “Open in Editor” option.)

On the Landing Page Designer, under “Insert Elements,” drag the “Form” object onto the white canvas. Choose the “Email Capture” Form created in step 2. For the purposes of this test, go ahead and select “Stay on this Page” for the Follow-up Page option. Then click the “Insert” Button.
Close out of the Landing Page Designer when you are satisfied with your Landing Page. Go to “Landing Page Actions” and click to “Approve” your page.

The notification will appear on the mobile device, having been delivered to the number configured in the Webhook in step 1.
Congratulations! You have successfully integrated Informatica’s SMS API into Marketo. You now have the ability to create SMS-enabled processes within the Marketo platform!

You can also customize this Webhook and create other new, more sophisticated Webhooks that use the Informatica SMS API. Mobile-enabling your sales and marketing teams, as well as creating innovative mobile campaigns, can pay tremendous dividends and substantially increase the ROI on your Marketo system.
About Informatica

Informatica Corporation (Nasdaq:INFA) is the world's number one independent provider of data integration software. Organizations around the world rely on Informatica to realize their information potential and drive top business imperatives. Informatica Vibe, the industry's first and only embeddable virtual data machine (VDM), powers the unique "Map Once. Deploy Anywhere." capabilities of the Informatica Platform. Worldwide, over 5,000 enterprises depend on Informatica to fully leverage their information assets from devices to mobile to social to big data residing on-premise, in the Cloud and across social networks. For more information, call +1 650-385-5000 (1-800-653-3871 in the U.S.), or visit www.informatica.com.