

Marketing Automation – SR creation process

Objective:

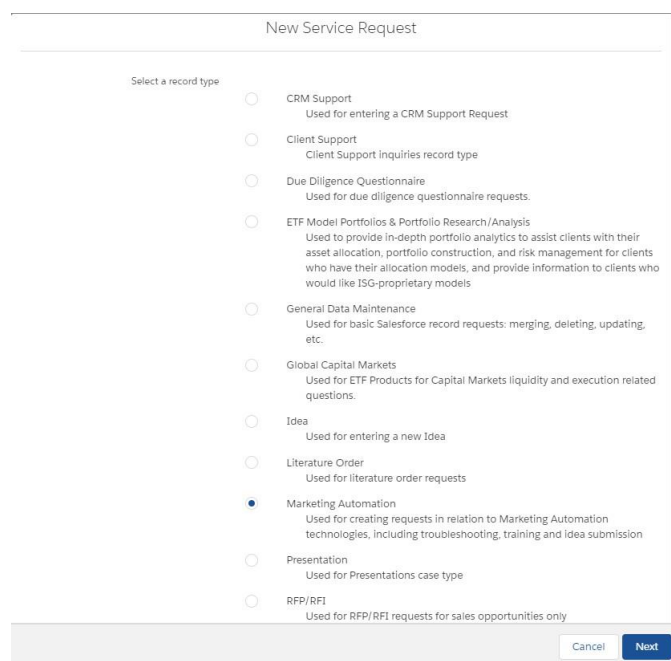
To ensure Marketo users understand the process of creating a Marketing Automation Service Request in Salesforce. Service Requests could include trouble-shooting, enhancement suggestions, and training requests.

Procedure:

1. Login to **Salesforce**.
2. Click the drop down button next to **“Service Requests”** and click **“New Service Request”**



On the New Service Request type window choose **“Marketing Automation”** Service Request type and click next:



3. On the “**Service Request information window**”, kindly fill the following fields before submitting the request.

- **Type:** Select the Marketo section the service request relates to ([Refer to the table below](#))
- **Sub Type:** Select the Asset that the service request relates to ([Refer to the table below](#))
- **Workspace:** Select the relevant Workspaces the service request relates to
 - All
 - APAC Agency
 - APAC ex Japan
 - Aus-End Investor
 - Australia
 - COE
 - COE Insto
 - Canada
 - Default
 - EMEA
 - EMEA Agency
 - MEA
 - Japan
 - NA Agency
 - North America
 - North East Asia
 - South East Asia
 - Testing
 - Training
- **Team Impacted:** Choose the LOB the service request relates to:
 - IBG
 - ICG
 - Both
- **Status:** This will be automatically set to “New” (No changes required)
- **Priority:** Select the urgency of the case:
 - **High** – Production down: Production system, application or critical feature / function is down (24 Hrs).
 - **Medium** – Production impaired: A major feature or function is not working correctly and is blocking full use of the Marketo system, but existing production campaigns are working correctly and other features are operational. (3 days)

➤ **Low** – Minor issue: A minor issue is impacting usability of the system, but a workaround is available and major features/functions are working correctly. (5 days)

- **Subject:** Brief description of the issue
- **Description:** Add more details about the issue and also include links to Marketo Programs and assets
- **Business Justification:** This field is required for Enhancement Requests; you will need to mention why the changes are required in Marketo and the use case. If it is not an Enhancement Request kindly type “**NA**” and submit the request.

Type*: Picklist (single selection)	Type*: Picklist (single selection)
Administration	Password Reset User/Role Related Workspace Related Integration Related
Database	Smart List Static List Segmentation List import Field related issues Record related issues
Marketing Activities	Email Email Template Landing Page Landing Page Template Form Snippets Images and Files
Analytics	Group Reports My Report/Saved Reports Report Configuration/Setup Analyzers
Salesforce	Configuration/Setup Data not syncing Campaign Sync
Integration	
New Marketing Automation technology or Bolt-On	