

Tokens

A token is a variable that can be used in Marketo smart campaign flow steps, emails, landing pages, snippets, and web campaigns. This guide provides information on available token types and their usage.

Examples of how to use tokens:

Event Date Consistency and Maintenance- If you have an event on a particular date you can add this token in to anywhere that the date needs to appear across the invitations, follow up emails and landing pages. Should this date change you only need update the date in the token and it will automatically update in all the locations that the location is placed. See page 3 for details

Personalization- You can also use “Person Tokens” in order to personalize your assets e.g. Dear {{lead.First Name}} or “Company Tokens” to include information about the contacts’ company e.g. Company Name. See page 9 onwards for details

My Tokens

My Tokens (also called custom tokens) are custom variables that you can create under Marketo Programs or campaign folders.



My Tokens are defined within the program and they are displayed like this: {{my.Name Of Token}}





Examples:

{{my.Event Date}}

{{my.SFDC Campaign}}

Here are the different types Custom Tokens available in Marketo

Token Type	When to use	Description
Calendar File 	Calendar File token is generally used in Event Programs. The purpose of this token is to create an ICS file in Marketo with the event details. This can then be used in the confirmation email and thank you page. Use this token to add a calendar event file (.ics) to your emails and landing pages.	Calendar File token allows you to add a calendar event (.ics) link to your Marketo emails and landing pages, so the recipients can save the date for the event.
Date 	Date token can be used to populate a particular date such as event date in emails or landing pages.	Date token holds a date value (e.g. 2020-06-01) and this token is used to populate a particular date such as event date wherever the token has been used.

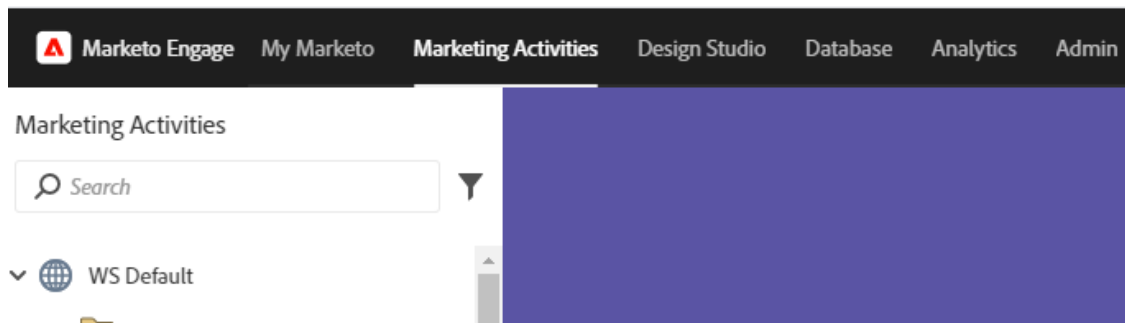
		Modifying the date token would update wherever this token has been referred. Therefore, you don't need to manually edit your assets (Time Saver)
Number 	Number token is used to generate a particular number in emails or landing pages such as sales volume or AUM.	Any integer. It can even be negative.
Rich Text 	<p>Rich Text token can be used to populate contents on an Email or Landing page such as event address or speaker details.</p> <p>Once you add the Rich Text token on your emails and landing pages, anytime you could replace/modify the content on the token and it would get updated on all your emails and landing pages wherever the token is referred. Therefore, you don't need to manually edit your assets (Time Saver)</p>	<p>Rich Text token is HTML. Use it in emails and landing pages.</p> <p>This token allows you to create content which can be included text, images, numbers, symbol and links. You will also have option to edit the font size and style.</p>
SFDC Campaign 	Use this token to allow leads that become part of a Marketo Program to also be added to the specified SFDC campaign.	SFDC Campaign token is used to populate a specific SFDC campaign in the smart campaign flow steps.
Text 	Text token is used to create a single line sentence such as title of the email or the event location in emails or landing pages.	Just some text. Use it when HTML would be unnecessary. The size limit for Text tokens is 524,288 characters (UTF-8), or 2 MB.

Example: Creating a Date Token

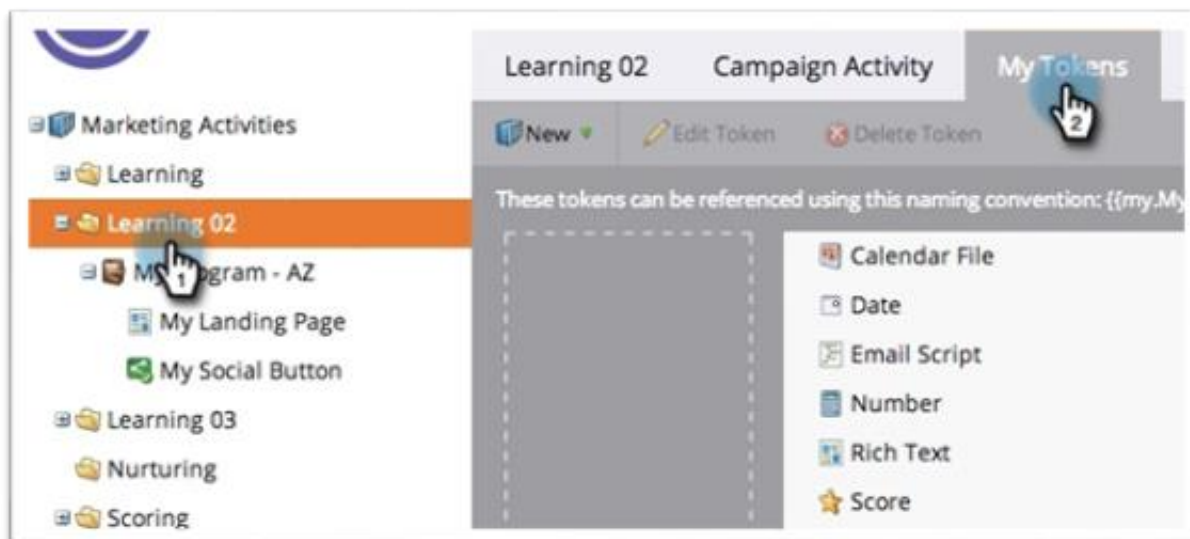
My Tokens can be used in flow steps, emails, and landing pages. The following steps will guide you to create a Date Token under your program.

Creating a date token would help you to ease your content creation process. You can refer this token wherever you want to use date of the event instead of updating it each time manually.

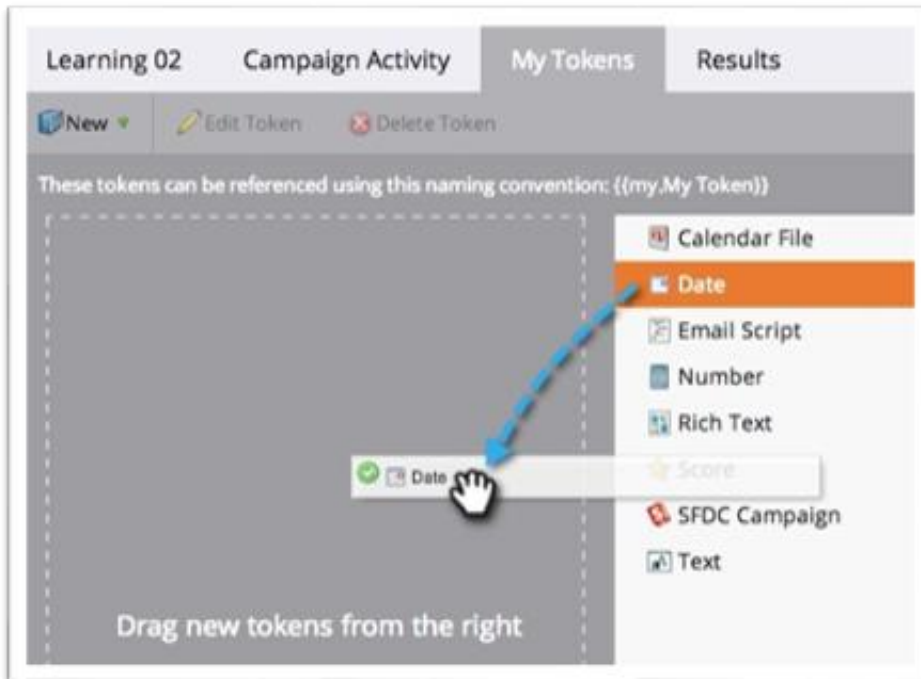
1. Click on **Marketing Activities** from the top menu bar.



2. In **Marketing activities**, click on the folder of the program you want to create a Token in. Click **My Tokens** located on the top right.

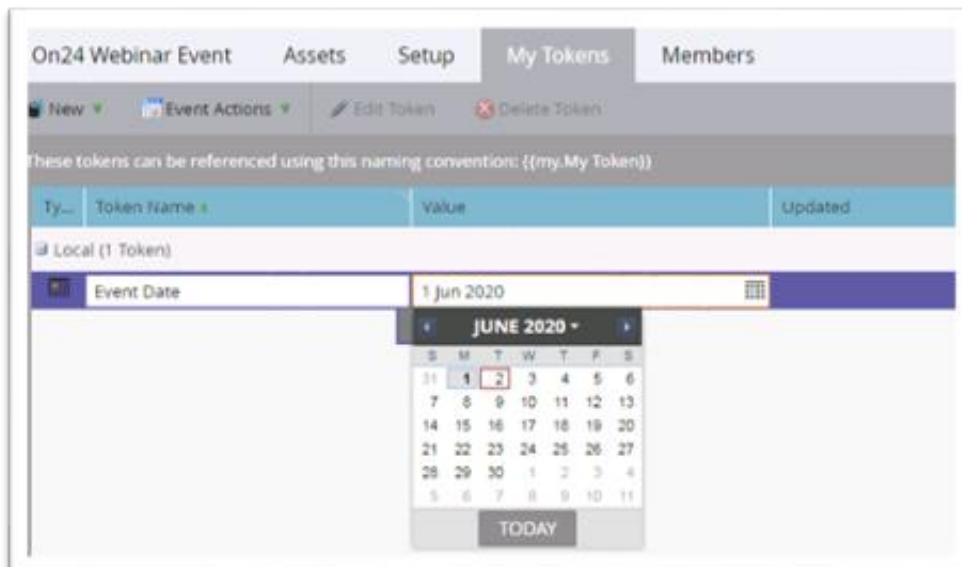


3. Drag and drop the Token of your choice onto the canvas.




Note: For this example, we have used 'Event Date' as a Token type.

4. Type in a unique name, and then enter a relevant value for the token and Click **Save**.





Now you have created a **Date Token**.

Ty...	Token Name ▲	Value	Updated
Local (1 Token)			
	{{my.Event Date}}	1 Jun 2020	2 Jun 2020 14:12

Example: Editing a Date Token

Double-click or right click on the **Token** and make your changes.

Ty...	Token Name ▲	Value	Updated
Local (1 Token)			
	Event Date	17 Jun 2020	 2 Jun 2020 14:12

Calendar for JUNE 2020:

S	M	T	W	T	F	S
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

TODAY

Click **Save**.

New Edit Tokens Delete Tokens

These tokens can be referenced using this naming convention: {{my.My Token}}

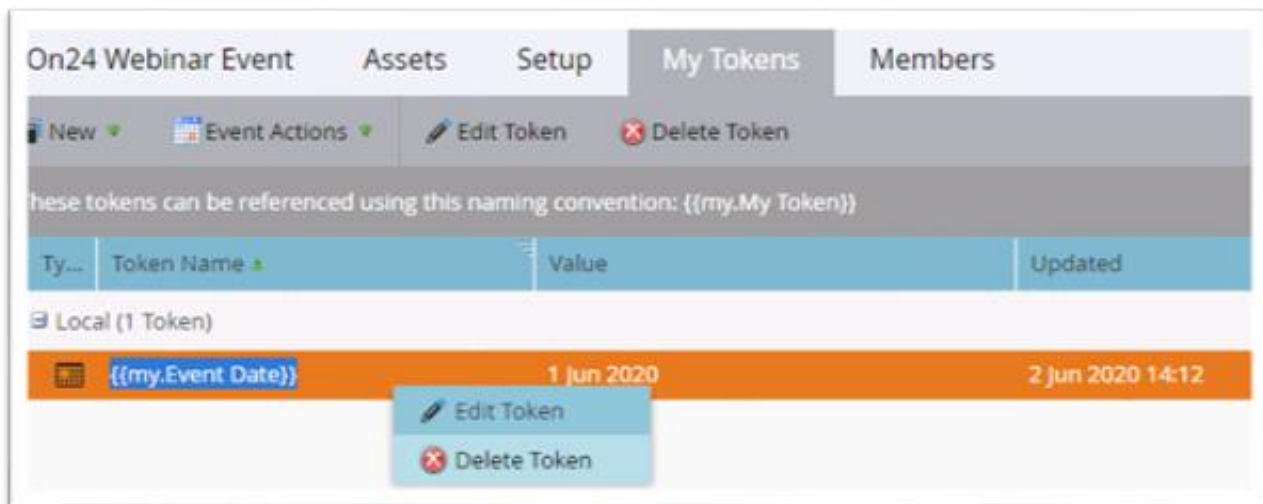
T...	Token Name ▲	Value	Updated
Local (1 Token)			
	Event Date	17 Jun 2020	

CANCEL SAVE

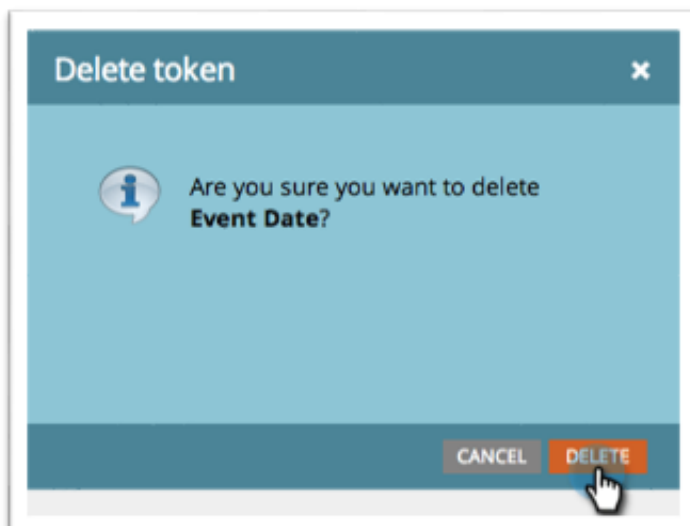
Delete My Token

When you delete a My Token, make sure you aren't referencing it in any asset. A blank space will display in any place it's referenced if deleted.

1. Right-click the **My Token**. Select **Delete Token**.



2. Click **Delete**



Using My Token in Smart Campaign Flow Step

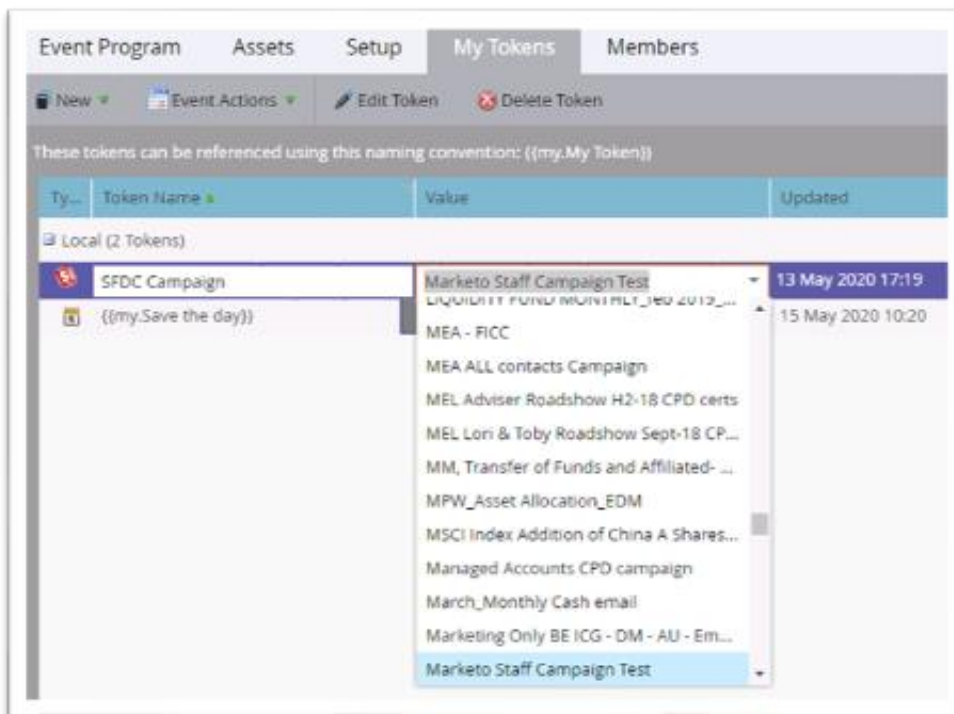
Token is a variable which can be used in emails, landing pages, and smart campaigns . You can use My Token in flow steps, emails, and landing pages.

You can use tokens to include variable content in these flow steps:

- Change Data Value
- Interesting Moment
- Salesforce Campaign Steps (add, remove, change status)
- Send Alert (in trigger campaigns only)

Here is the process of using SFDC Campaign token in the flow step:

1. Create a SFDC Campaign token by adding your SFDC campaign name.



2. In your smart campaign flow step, select your SFDC Campaign token

The screenshot displays the 'Flow' configuration page for a smart campaign. The breadcrumb trail is '03 | Registered, Conf Email & Reminder > Smart List > Flow > Schedule > Results'. The current step is '2 - Change Status in SFDC Campaign'. The interface includes a toolbar with 'New', 'Campaign Actions', and 'View Campaign Members' buttons, and 'Collapse All' and 'Expand All' options. An 'Add Choice' button is visible in the top right of the configuration area.

Choice 1

If: SFDC Type [Per] is Contact

Campaign: {{my.SFDC Campaign}}
New Status: Registered

Default Choice

Campaign: -- Do Nothing --
New Status: Select...

Note: Only the first matching choice applies

Using Person Token

Person token is used to pull personal information such as first name, last name or city name from Marketo database. You can use person token in emails, landing pages, and campaign flow steps.

Person tokens will look for a value available in Marketo database and it would show the default value in case the field is empty for that person record.

Note: Make sure that you have given default values when you use any token.

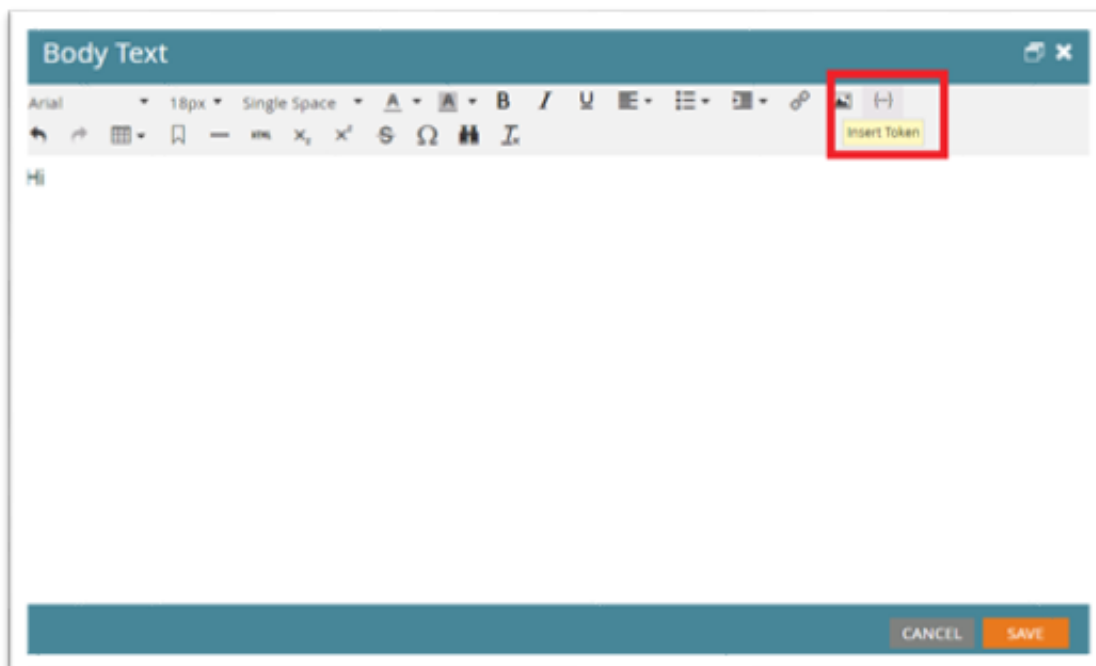
Here are few person token examples:

- {{lead.Acquisition Program}}
- {{lead.Address}}
- {{lead.City}}
- {{lead.Email Address}}
- {{lead.First Name}}
- {{lead.Job Title}}
- {{lead.Last Name}}
- {{lead.Phone Number}}
- {{lead.SFDC Type}}

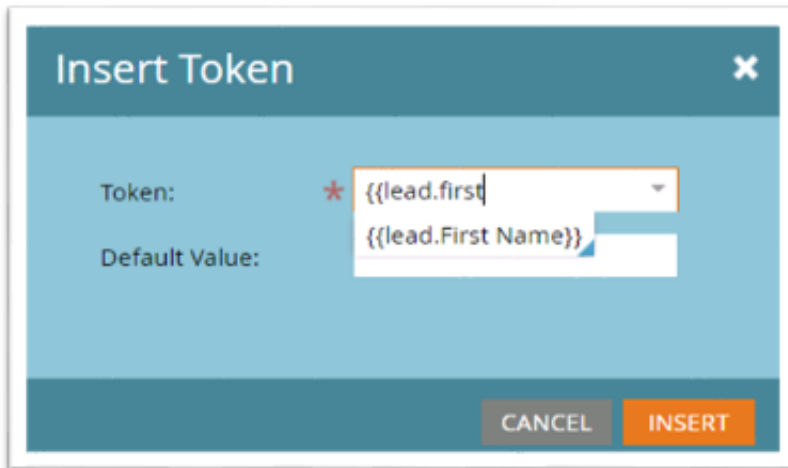
Note: Apart from this, you can also use Company Employee fields that are syncing to Marketo from Salesforce as person tokens.

Here is the steps to add First name token in the email:

1. Click on the **Insert Token** button



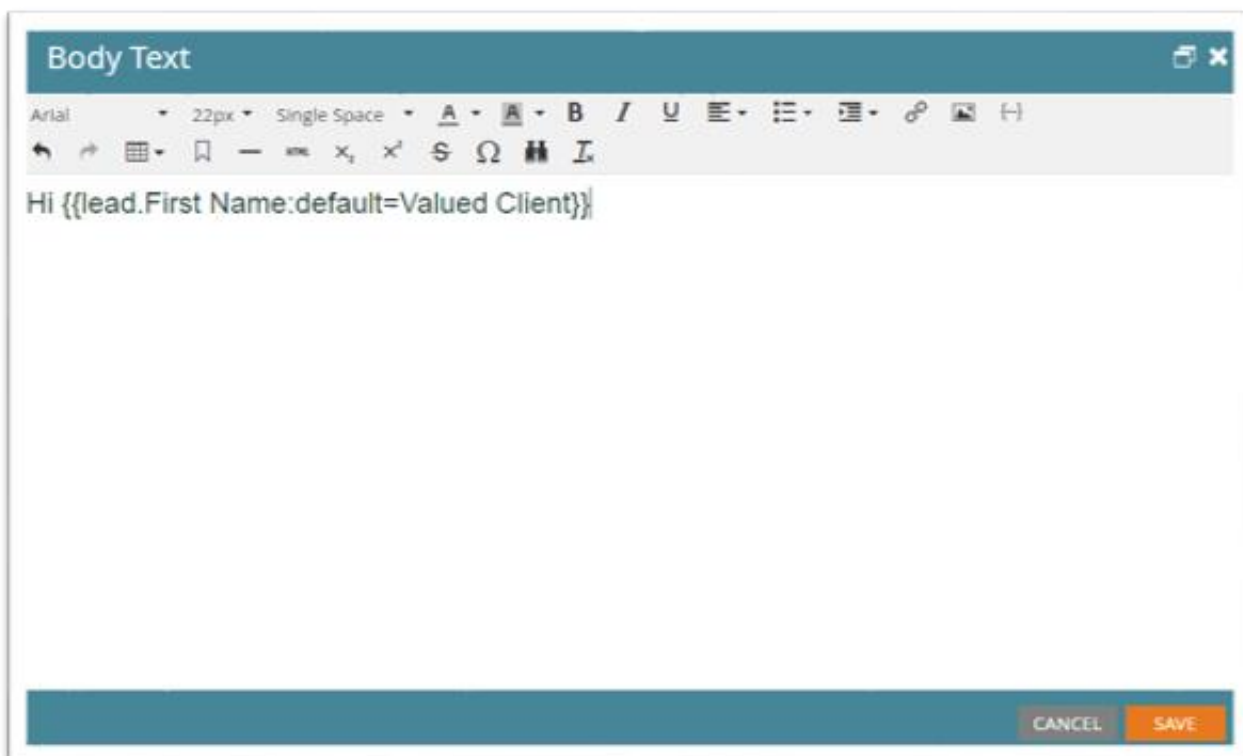
2. Search **First Name** token and insert the token after adding default value



The screenshot shows a dialog box titled "Insert Token" with a close button (X) in the top right corner. It contains two input fields: "Token:" and "Default Value:". The "Token:" field has a red asterisk icon and contains the text "{{lead.first}}". The "Default Value:" field contains the text "{{lead.First Name}}". At the bottom of the dialog, there are two buttons: "CANCEL" and "INSERT".

Note: Make sure you have updated default value. This means that if the field is blank that it will show the default value.

Once you add the token with default value, it should look like this:



The screenshot shows a rich text editor window titled "Body Text" with a close button (X) in the top right corner. The editor has a toolbar at the top with various formatting options like font face (Arial), size (22px), spacing (Single Space), bold, italic, underline, list, link, and image. The main text area contains the text "Hi {{lead.First Name:default=Valued Client}}". At the bottom of the editor, there are two buttons: "CANCEL" and "SAVE".

Using Company Token

Company tokens pull all company level details of leads or contacts such as company names, countries, or addresses. This token can be used in emails, landing pages, and campaign flow steps.

When you send an email to a group of people, you can generate their company details in the email or landing pages.

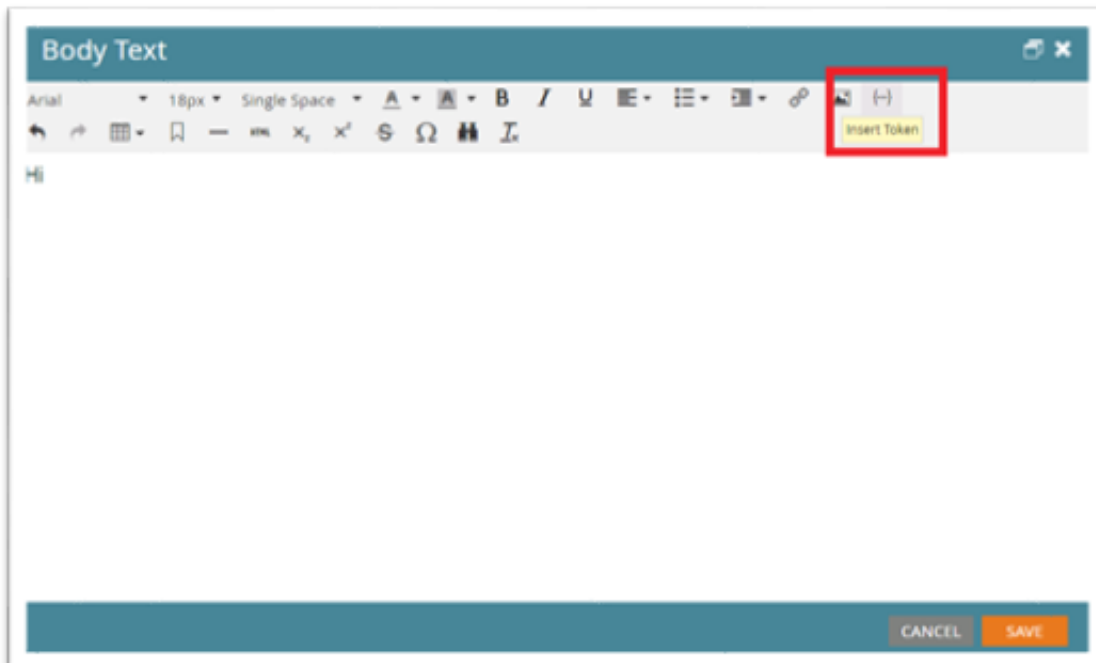
Here are mostly used company tokens:

- {{Company.Account Owner Email Address}}
- {{Company.Address}}
- {{Company.City}}
- {{Company.Company Name}}
- {{Company.Country}}
- {{Company.Main Phone}}
- {{Company.SFDC Type}}
- {{Company.Site}}
- {{Company.State}}
- {{Company.Website}}

Note: Apart from this, you can also use Company fields that are syncing to Marketo from Salesforce as Company tokens.

Here is the process of using **Company Name** token in an email:

1. Click on **Insert Token** button



2. Search for **Company Name** token and insert it to your email

Insert Token

Token: * {{company.company na

Default Value: {{company.Company Name}}

CANCEL INSERT