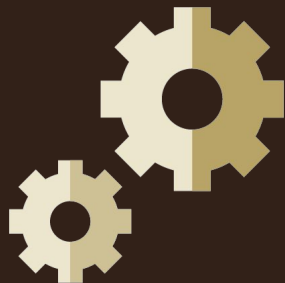




Documentation

Getting Started with Stack Moxie

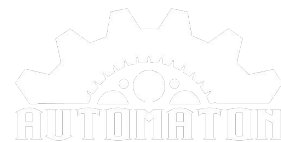


Why is testing so important?

Organized and routine testing is imperative to run a steady and scalable martech stack. As your stack complexity continues to grow, it's important to stabilize and vet your ecosystem.

- Save time by having fewer problems to fix
- Be proactive instead of reactive
- When making changes, be confident nothing gets broken in the process
- Know that systems are working as expected
- Develop and track operational metrics
- Minimize loss of revenue due to system errors

What should you be testing?



Website

- Pages and Links
- Preference Center
- Downloadable Assets
- Meta Data (Munchkin)



Marketo

- Form Submissions
- Lead Routing
- Emails
- Landing Pages/Forms



Salesforce

- Sync/Integration
- Lead Assignment
- Workflow
- Field Mapping



And More...

- More Integrations
 - SalesLoft, etc
- Attribution Tracking
- Complex Workflow
- Lifecycle Management

Let's get started with just 6 Scenarios – and you can add more later!



Website

1. Page is Up
2. Google Analytics



Marketo

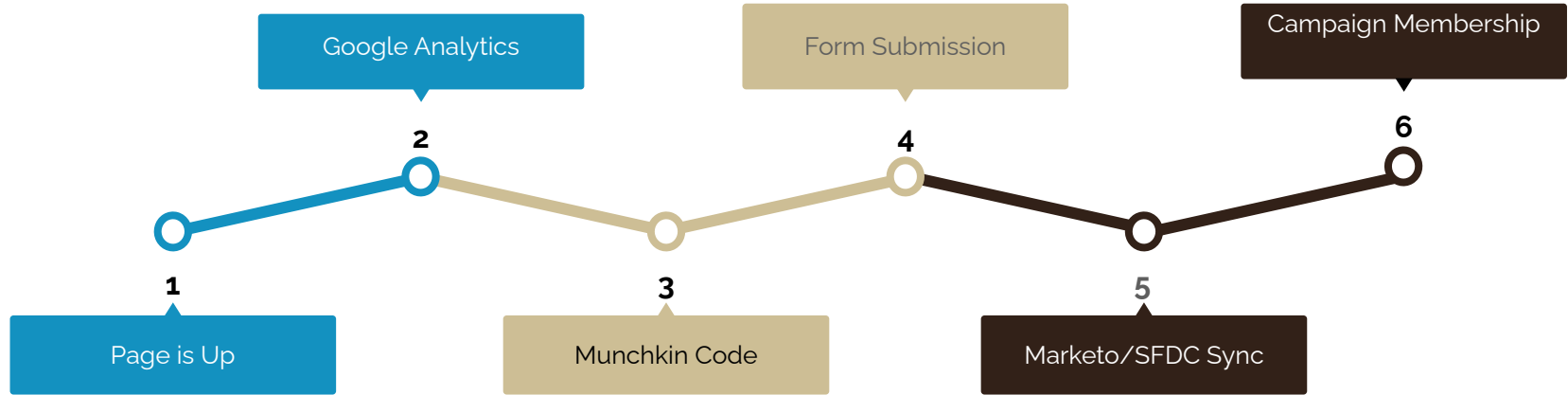
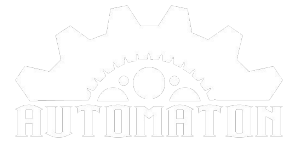
3. Form Submissions
4. Munchkin Code



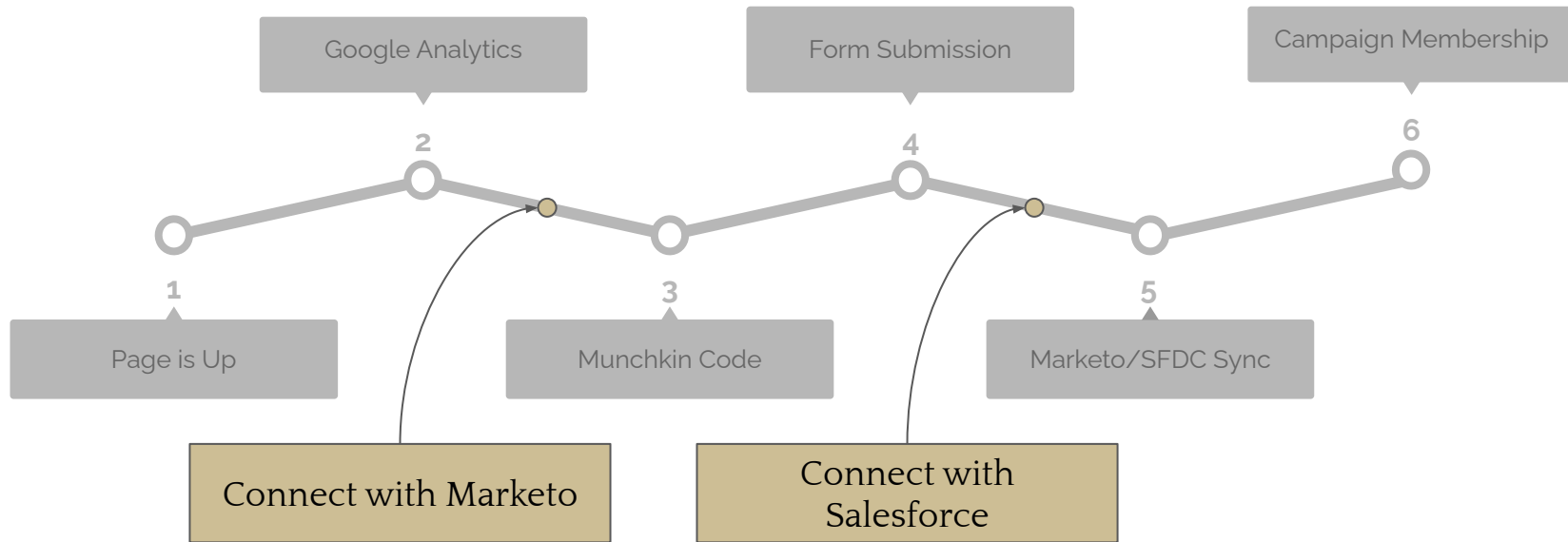
Salesforce

5. Sync/Integration
6. Campaign Membership

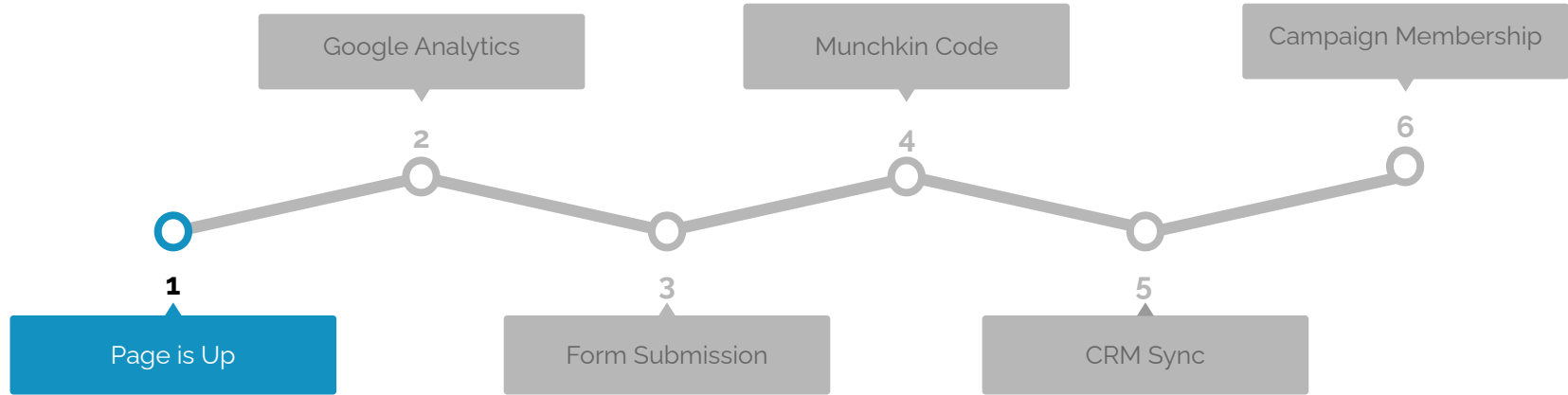
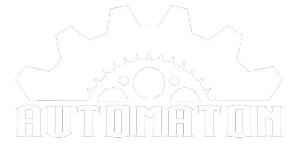
We'll build the 6 scenarios in this order:



Along the way, we'll also connect Stack Moxie to Marketo and Salesforce:



Scenario 1: Check that a web page is up.

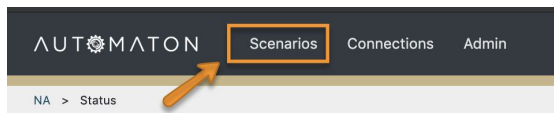


Scenario 1: Check that a web page is up.

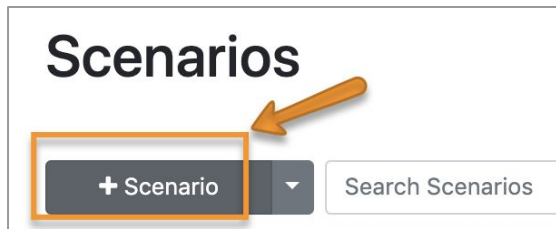


1. Navigate to Starter Scenarios Page:

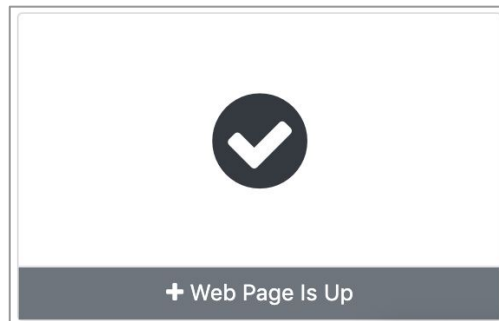
Go to "Scenarios":



Then "+Scenario":



2. Find the "+ Web Page is Up" Scenario:



3. Enter Page URL and Run Test

Web Page Is Up

This starter will help you create a scenario that automatically:

1. Navigates to a web page,
2. And ensures the page was able to load successfully.

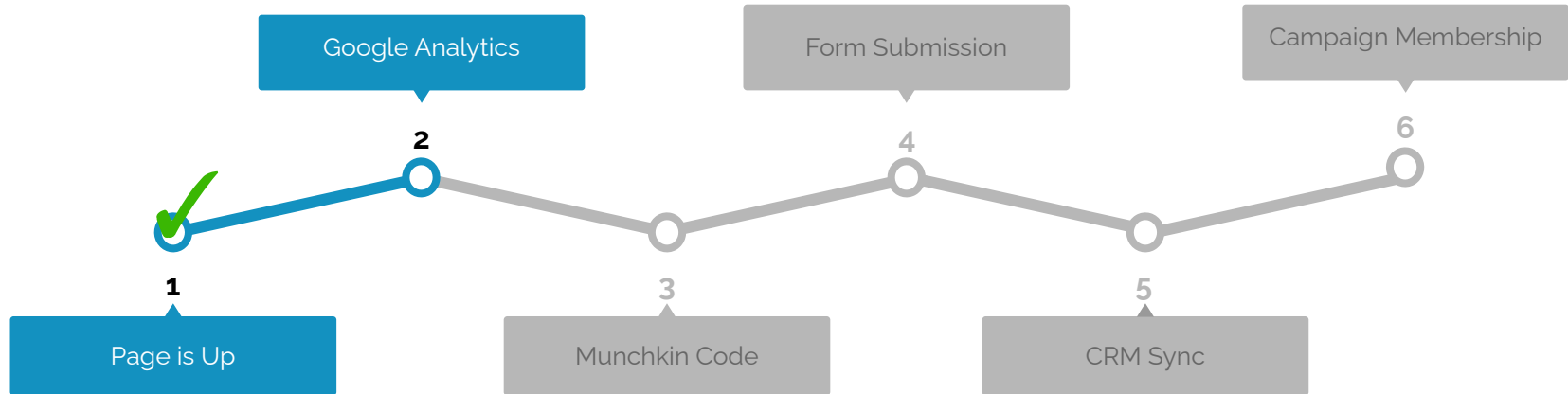
Landing Page URL

Test URL (e.g. https://example.com)

Create and Run

Cancel

Scenario 2: Check Google Analytics tracking script



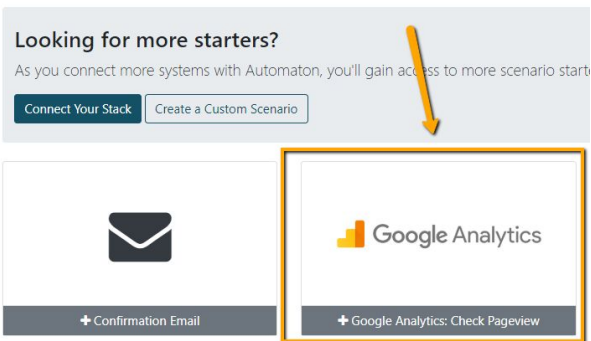
Scenario 2: Check Google Analytics tracking script



1. Click on Google Analytics Starter

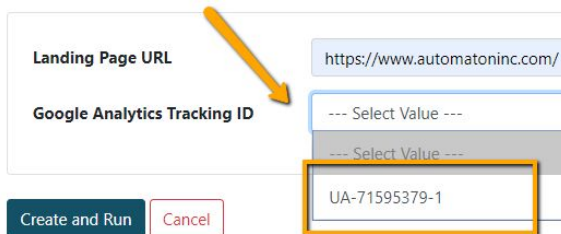
Navigate to scenarios and select the Google Analytics: Check Pageview starter.

Scenario Starters



2. Drop in Page URL

The tool will scan the page for your GA ID—this may take a second. Once the tracking ID populates with "Value", you can click the drop down and select your ID.



3. Run your test

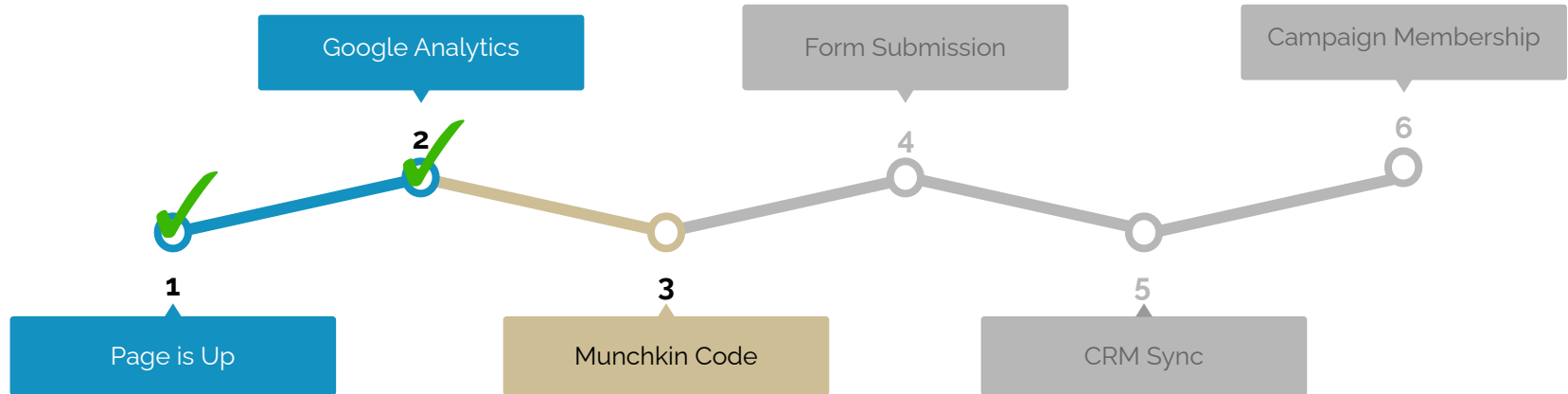
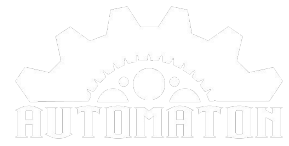
Click "Create and Run". The test will scan the page to make sure a page visit is firing for your Google Analytics within the test log.

✓ 1. Navigate to <https://www.automatoninc.com/>

✓ 2. Google analytics should have tracked a pageview for tracking id UA-71595379-1

Successfully detected GA pageview for tracking id UA-71595379-1.

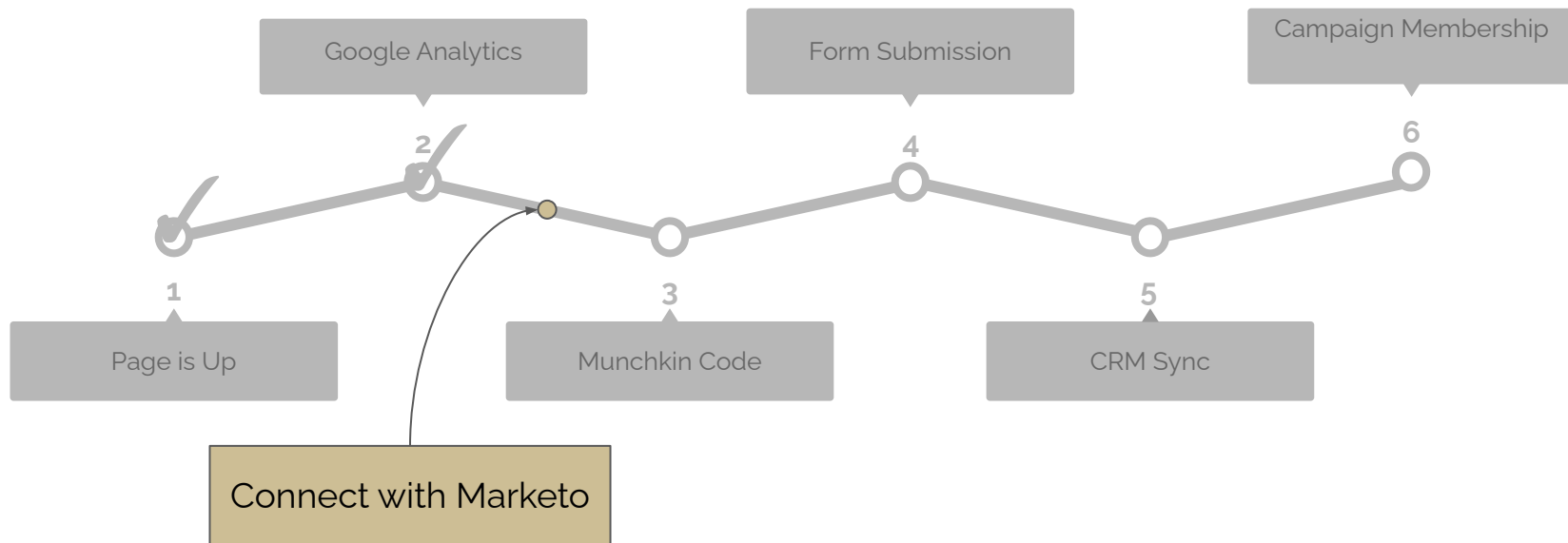
Scenario 3: Munchkin Code

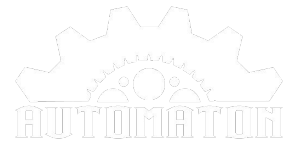


Prerequisite for Scenario 3: Connect Stack Moxie to Marketo



To set up this scenario, you must first connect Stack Moxie with Marketo. Please review the setup requirements [here](#).





Scenario 3: Munchkin Code

1. Go to "+Marketo: Munchkin Test" Starter:

Go to "Scenarios", then click on "+Scenario" and find this starter:



2. Enter the URL that you're testing:

Marketo: Munchkin Check

This starter will help you create a scenario that automatically:

1. Navigates to a web page,
2. And ensures the Marketo Munchkin tracking script fired successfully.

Landing Page URL

Test URL (e.g. <https://example.com>)

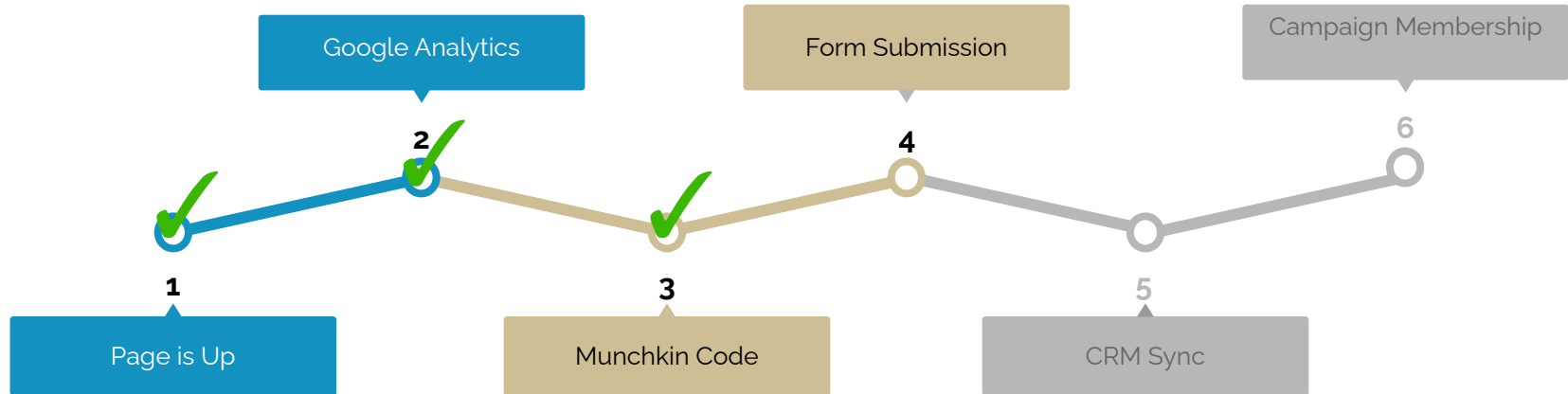
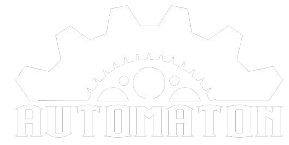
Create and Run

Cancel

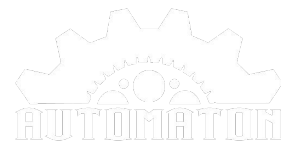
3. Run the test

Click "Create and Run" to create the scenario and run the test.

Scenario 4: Test Marketo Form Submission.



Scenario 4: Test Marketo Form Submission



Select Marketo Form to Lead Starter Scenario

Navigate to Scenarios and select the "+Marketo: Form to Lead" starter.



Enter Page URL

Enter your page URL into the test. The tool will scrap your page for the form. Under "Form to Submit", select your submit button.

Landing Page URL

Form to Submit (CTA)

Fields to submit on landing page form

Lead fields to check in Marketo (left) and their expected values

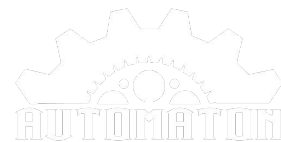
Select Fields

Under "Fields to submit on landing page form", select the fields for your form.

Make sure to enter any fields required by the form here.

Fields to submit on landing page form (left) and test values for each field (right)	
First Name:	Test field value
Last Name:	Test field value
--- Select Field ---	
First Name:	
Last Name:	
Company Name:	

Scenario 4: Test Marketo Form Submission



Add values to your field input

Add fields to check against in Marketo

You can use our [tokens](#) to auto-populate dummy data, or you can add any value you would like to test against.

Now you can select which fields you want to check in Marketo. You can check that data ended up in the correct fields as expected, and you can also add any other field validations on the lead record that you expect to see. If you use tokens, you will need to use the same token in the validation.

First Name:	{{any.word}}
Last Name:	{{any.word}}
Company Name:	{{any.word}}
Email Address:	{{any.email}}
Country:	United States
--- Select Field ---	

Lead fields to check in Marketo (left) and their expected values (right)

First Name	{{any.word}}
Last Name	{{any.word}}
Company Name	{{any.word}}
Email Address	{{any.email}}
Country	United States
--- Select Field ---	

Scenario 4: Test Marketo Form Submission



Create your scenario

Click "Create and Edit" to save your test.

Lead fields to check in Marketo (left)

First Name

Last Name

Company Name

Email Address

Country

--- Select Field ---

Create and Edit **Cancel**

Review your scenario

You can now review scenario definition, and make edits as needed. This outlines each step of the test.

Scenario Definition

Navigate to a webpage ☒

Page URL

Suggestions

Fill out a form field ☒

Form Field

Form Field Value

Suggestions

Run Your scenario

Scroll to the bottom of the page and click "Save and Run" to activate your test. You can also name your test and add it to a folder under "Scenario Details".

Scenario Details

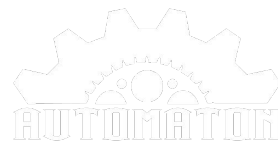
Name

Folder

Description

Save and Run **Save and View** **Cancel**

Scenario 4: Test Marketo Form Submission

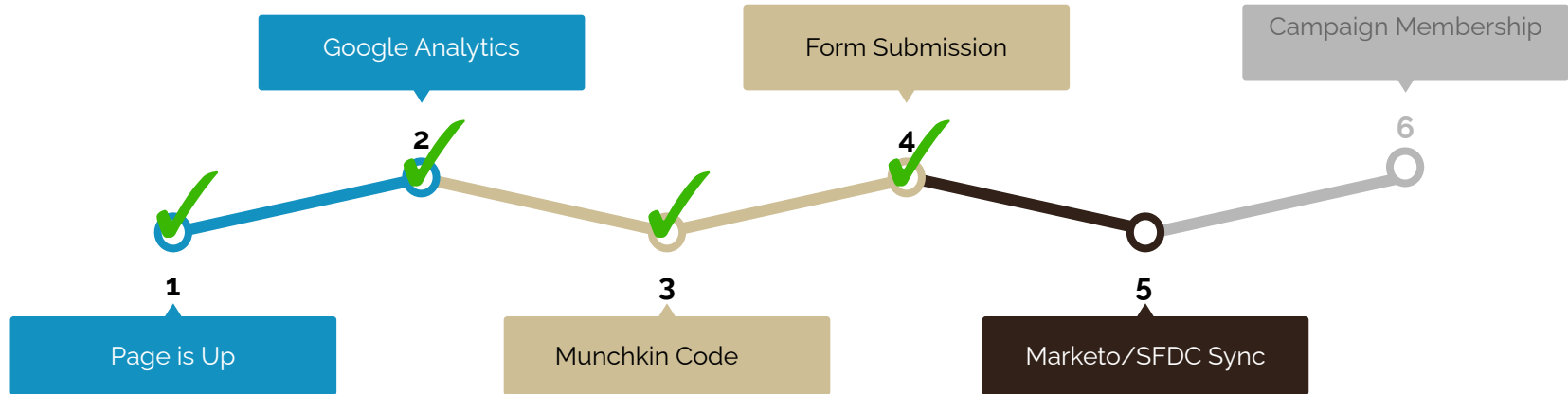
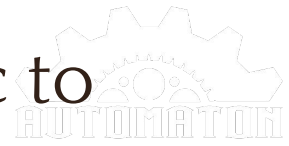


Review your log

The tool will now run your scenario and will pass or fail at each step. Once the test passes, the data for the test lead will be automatically deleted from your system. That's it, you did it!

1. Navigate to http://go.automatoninc.com/Automatest-Live-Demo-Page-EMPRNE.html?utm_source=web	Where A Browser	Outcome Passed
2. Fill out input[name="FirstName"] with make	Where A Browser	Outcome Passed
3. Fill out input[name="LastName"] with make	Where A Browser	Outcome Passed
4. Fill out input[name="Company"] with make	Where A Browser	Outcome Passed
5. Fill out input[name="Email"] with 817c3fd2-32ef-439a-97a3-9d83688d60b3@thisisjust.automatest.com	Where A Browser	Outcome Passed
6. Fill out select[name="Country"] with United States	Where A Browser	Outcome Passed
7. Submit the form by clicking button.mktoButton	Where A Browser	Outcome Passed
8. The firstName field on marketo lead 817c3fd2-32ef-439a-97a3-9d83688d60b3@thisisjust.automatest.com should be make	Where Marketo	Outcome Passed
9. The lastName field on marketo lead 817c3fd2-32ef-439a-97a3-9d83688d60b3@thisisjust.automatest.com should be make	Where Marketo	Outcome Passed
10. The company field on marketo lead 817c3fd2-32ef-439a-97a3-9d83688d60b3@thisisjust.automatest.com should be make	Where Marketo	Outcome Passed
11. The email field on marketo lead 817c3fd2-32ef-439a-97a3-9d83688d60b3@thisisjust.automatest.com should be 817c3fd2-32ef-439a-97a3-9d83688d60b3@thisisjust.automatest.com	Where Marketo	Outcome Passed
12. The country field on marketo lead 817c3fd2-32ef-439a-97a3-9d83688d60b3@thisisjust.automatest.com should be United States	Where Marketo	Outcome Passed
13. Delete the 817c3fd2-32ef-439a-97a3-9d83688d60b3@thisisjust.automatest.com marketo lead	Where Marketo	Outcome Passed
Successfully deleted lead 817c3fd2-32ef-439a-97a3-9d83688d60b3@thisisjust.automatest.com		Ran At 2 minutes ago Ran For 2.09 seconds

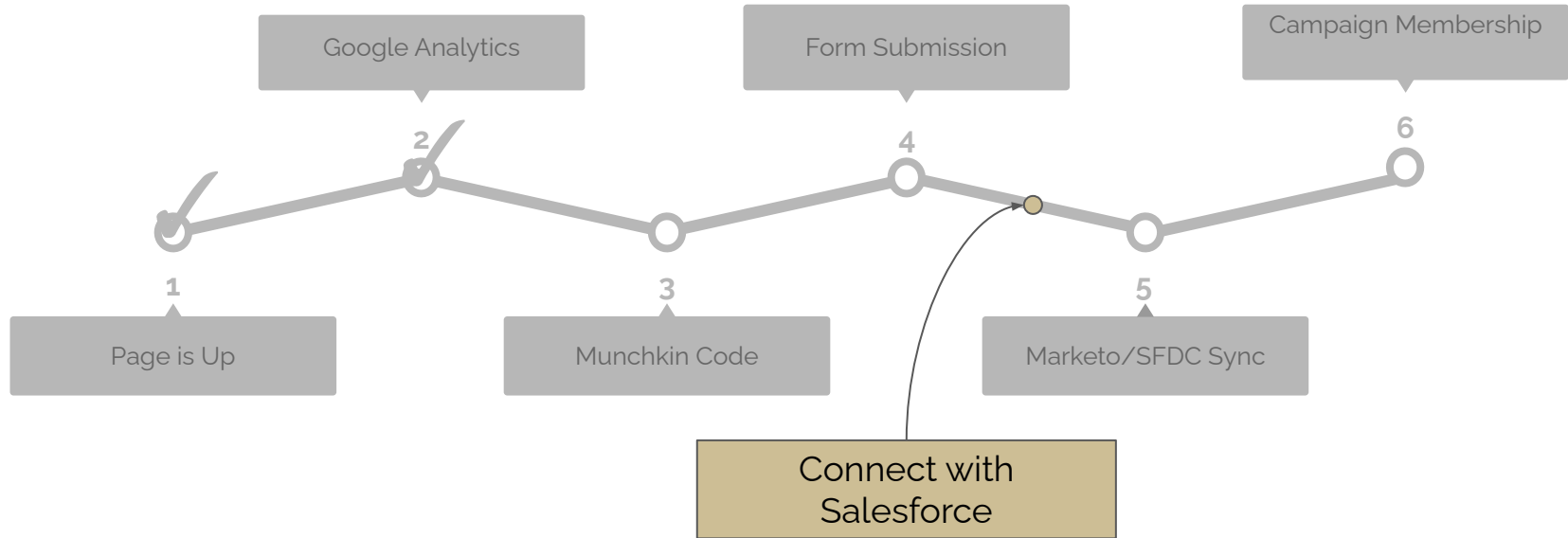
Scenario 5: Check that Leads in Marketo sync to Salesforce



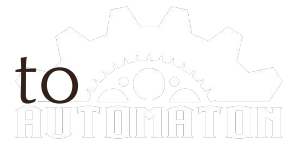
Prerequisite for Scenario 5: Connect Stack Moxie to Salesforce



To set up this scenario, you must first connect Stack Moxie with Salesforce. Please review the setup requirements [here](#).



Scenario 5: Check that Leads in Marketo sync to Salesforce



Select the Scenario created in Scenario 4:

Navigate to the scenario you just created to test Marketo Form Submission (Scenario 4) and click on the stacked hamburger icon next to the test you just ran, then click "edit". Rather than creating a new Scenario, we'll use this existing scenario and add to it.

Scenarios

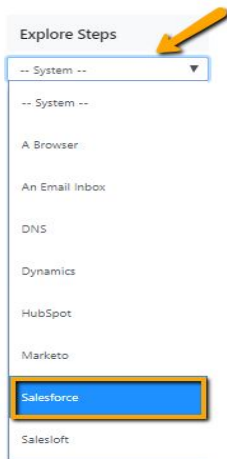
A screenshot of the 'Scenarios' interface. At the top, there is a '+ Scenario' button, a search bar labeled 'Search Scenarios', and a 'Filter Scenarios' dropdown. Below this is a table of scenarios. The first scenario is 'My first test' with a status of 'Last Ran 9 minutes ago' and 'Pass'. The second scenario is 'Marketo to SFDC to Salesloft lead routing test' with a status of 'Last Ran an hour ago' and 'Pass'. A context menu is open for the second scenario, showing options: 'Run', 'Schedule', 'Edit' (highlighted with a yellow box), and 'Copy'. A yellow arrow points to the 'Edit' button.

Scenario 5: Check that Leads in Marketo sync to Salesforce



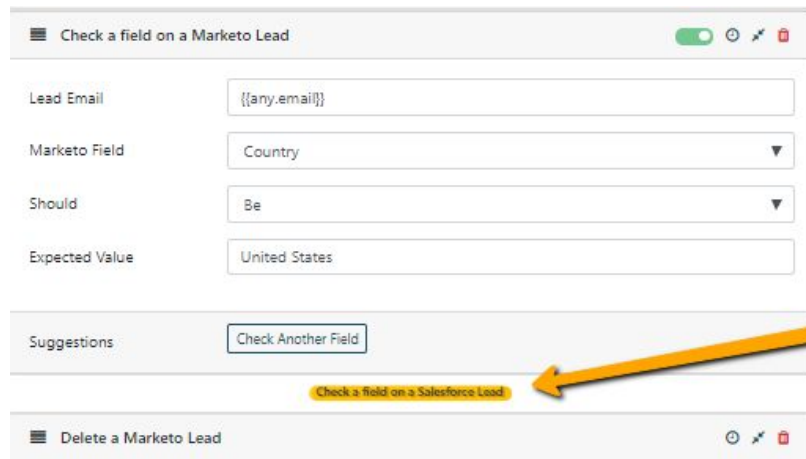
Add steps to your scenario

The scenario definition will open up. On the left-hand side click on explore steps, and select Salesforce.



Choose your step pill

A group of step “pills” will populate for SFDC. Select “Check a field on a Salesforce lead” and drag it to your canvas after your last “Check field in Marketo”, and before “Delete Marketo lead”



Drag a step pill to the left, onto the scenario definition canvas.

- Create a Salesforce Account
- Create a Salesforce Contact
- Create a Salesforce Lead
- Create a Salesforce Opportunity
- Delete a Salesforce Account
- Delete a Salesforce Contact
- Delete a Salesforce Lead
- Delete a Salesforce Opportunity
- Check a field on a Salesforce Account
- Check a field on a Salesforce Campaign Member
- Check a field on a Salesforce Contact
- Check a field on a Salesforce Lead
- Check a field on a Salesforce Opportunity
- Check Salesforce Campaign Membership

Scenario 5: Check that Leads in Marketo sync to Salesforce



Define the step

For this step you will want to define what field you are looking for. You can check any field on the lead record. For this step we are checking that the email address was synced to SFDC from Marketo. Since we used a token for our email, we will want to use that same token to reference the lead we are checking for that test. Here we are saying to reference the email record used in our "{{any.email}}" token to validate that "lead field = email" has the same value as our {{any.email}}, which will validate that our test lead made it to Salesforce.

The screenshot shows a configuration window titled "Check a field on a Salesforce Lead". It contains the following fields:

- Lead Email:** A text input field containing the token "{{any.email}}", which is highlighted with a yellow border.
- Lead Field:** A dropdown menu with "Email" selected.
- Should:** A dropdown menu with "Be" selected.
- Expected Value:** A text input field containing the token "{{any.email}}".
- Suggestions:** A button labeled "Check Another Field".

Scenario 5: Check that Leads in Marketo sync to Salesforce



Add your wait step

Click on the clock on the top of the step and add the amount of time you want the tool to wait to check for the record in SFDC. Normally, you will have a delay in when your data syncs from Marketo to SFDC. If you are syncing at the flow step or program level, this should occur in between 5 and 15 minutes. Make sure to account for any wait steps in your flow steps.

Check a field on a Salesforce Lead

Lead Email:

Lead Field:

Should:

Expected Value:

Timing: Retry 0 minutes Wait 5 minutes

Delete lead out of SFDC

Under "Explore Steps" drag the "Delete a Salesforce lead" pill under your "Check a field on an SFDC lead", and paste the `{{any.email}}` token, since that is the test lead record we want to delete after the test is done.

Delete a Salesforce Lead

Lead's email address:

Explore Steps: Create a Salesforce Lead, Create a Salesforce Opportunity, Delete a Salesforce Account, Delete a Salesforce Contact, Delete a Salesforce Lead, Delete a Salesforce Opportunity

Scenario 5: Check that Leads in Marketo sync to Salesforce



Run your test

Scroll to the bottom of the page and click "Save and Run"

Scenario Details

Name

My first test

Folder

--- Select a Folder ---

Description

For example: Proves :

Save and Run

Save and View

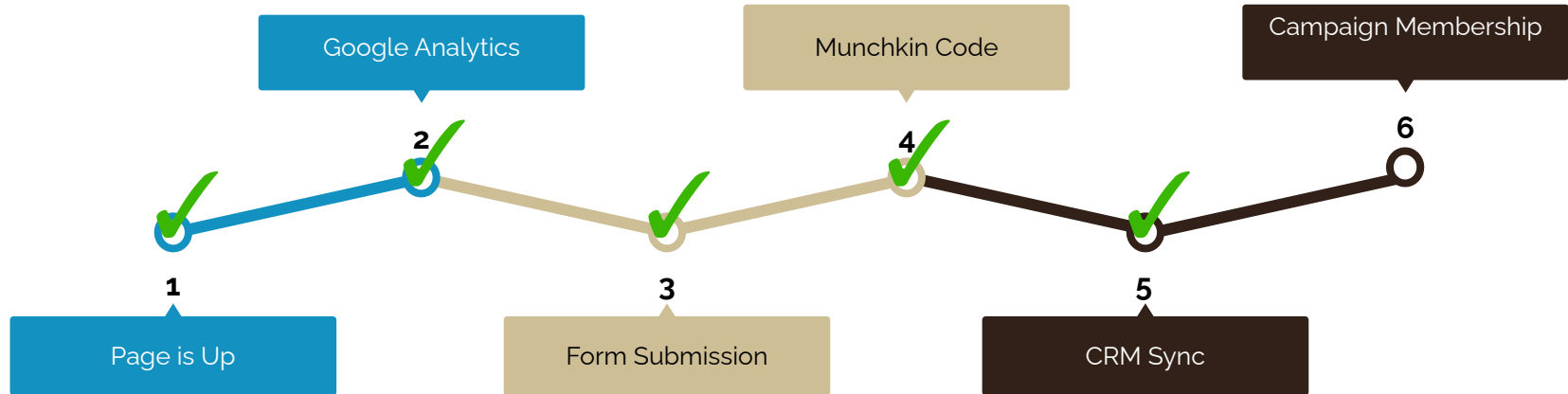
Cancel

Review Results

Your scenario will now run and pass or fail at each step. Once the test passes the lead will be deleted out of both Marketo and SDFC.

13. The Email field on salesforce lead a81723b5-6007-4388-9745-0b38876569fa@thisisjust.atomatest.com should be a81723b5-6007-4388-9745-0b38876569fa@thisisjust.atomatest.com	Where ☺ Salesforce	Outcome ☺ Passed
14. Delete the a81723b5-6007-4388-9745-0b38876569fa@thisisjust.atomatest.com salesforce lead	Where ☺ Salesforce	Outcome ☺ Passed

Scenario 6: Test Salesforce Campaign Membership



Scenario 6: Check That Your Lead was Added to a SFDC Campaign



This scenario will check whether a lead in SFDC is a member of an SFDC Campaign.

This scenario assumes that a lead that fills out a Marketo Form and is synced to SFDC is then also automatically added to a Salesforce campaign—and that's the workflow that we're testing.

So if you don't have a workflow rule that automatically adds new leads in SFDC to SFDC Campaigns, then this scenario won't work for you.

Scenario 6: Check That Your Lead was Added to a SFDC Campaign



Select your scenario

Navigate to Scenarios and click on the stacked hamburger icon next to the test you just ran. Then click "Edit".

Scenarios

+ Scenario		Search Scenarios	Not in a Feature	
✓	My first test	Last Ran 30 minutes ago	Last Passed	
✓	SEO: Social Tags for Homepage	Last Ran 3 days ago	Last Passed	
✗	SEO: Social Tags for Homepage	Last Ran 3 days ago	Last Error	

▶ Run

⌚ Schedule

✎ Edit

📄 Copy

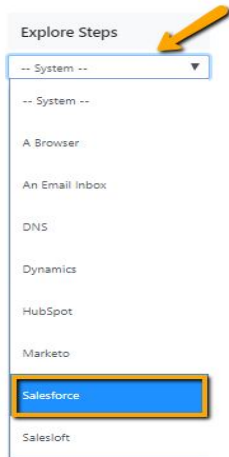
📁 Set Folder

🗑 Delete

Scenario 6: Check That Your Lead was Added to a SFDC Campaign

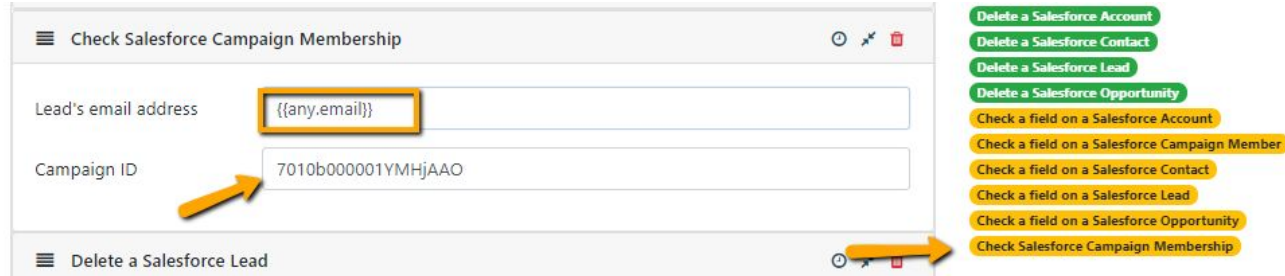
Add steps to your scenario

The scenario definition will open up. On the left-hand side click on "Explore Steps", and select Salesforce.



Choose your pill

A group of step "pills" will populate for SFDC. Select "Check salesforce campaign membership" and drag it to your canvas after your last "Check a field on a Salesforce lead", and before "Delete a Salesforce lead". Use the `{{any.email}}` to reference the lead record for this test and paste your 18 digit Campaign ID into the Campaign ID field. If you need help finding your Campaign ID, click [here](#).



Scenario 6: Check That Your Lead was Added to a SFDC Campaign



Run your test

Scroll to the bottom of the page and click "Save and Run".

Scenario Details

Name

My first test

Folder

--- Select a Folder ---

Description

For example: Proves :

Save and Run

Save and View

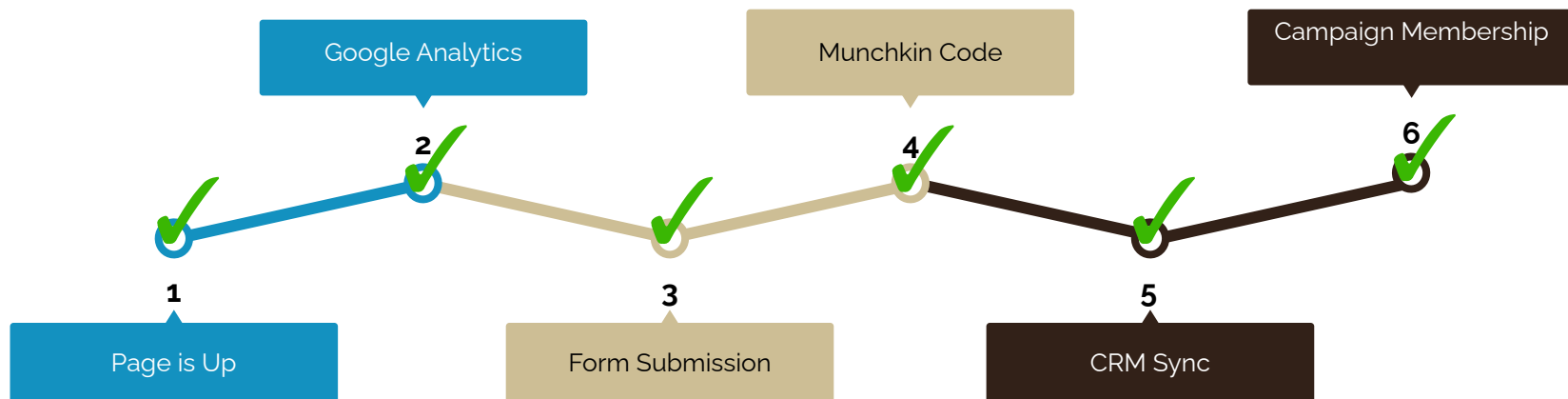
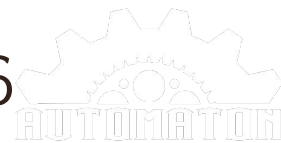
Cancel

Review Results

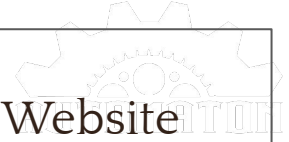
Your scenario will now run and pass or fail at each step. Once the test passes, the lead will be deleted out of both Marketo and SDFC, and the SFDC campaign.

✓ 14. The salesforce lead 9a216f8c-a245-4345-a7b6-a4fae2271928@thisisjust.atomatest.com should be a member of campaign 7010b000001YMHjAAO	Where ☯ Salesforce	Outcome ☯ Passed
✓ 15. Delete the 9a216f8c-a245-4345-a7b6-a4fae2271928@thisisjust.atomatest.com salesforce lead	Where ☯ Salesforce	Outcome ☯ Passed
✓ 16. Delete the 9a216f8c-a245-4345-a7b6-a4fae2271928@thisisjust.atomatest.com marketo lead	Where ☯ Marketo	Outcome ☯ Passed
Successfully deleted lead 9a216f8c-a245-4345-a7b6-a4fae2271928@thisisjust.atomatest.com		Ran At ☯ 6 minutes ago
		Ran For ☯ 1.70 seconds

That's it! You've successfully setup your first 6 Scenarios!



Next Steps for Website Testing



Website

- GDPR Compliance Test
- Landing Page Asset Download Email Confirmation Test
- SEO Tags
- More Google Analytics Tracking
- Advanced Website Testing

Next Steps for Marketo Testing

Marketo

- UTM Tracking
- Nurture Email
- Lead Lifecycle
- Data Enrichment
- Advanced Marketing Automation

Next Steps for Salesforce Testing



Salesforce

- Lead Assignment
- UTM Tracking
- Nurture Email
- Lead Lifecycle
- Data Enrichment
- Advanced Marketing Automation

Even More Tests to Explore

Other
Examples

- Attribution (Bizible) Tracking
- Salesloft Integration