



# Integration Set Up Guide



The [Marketo Integration for Pipeliner CRM](#) powered by itDuzzit makes it possible to automatically create or update Leads and Contacts directly in Pipeliner CRM. Get started now:

## Integration Check List

1. You must have a unique server API user account for Pipeliner CRM.

To create the account, please follow these steps:

- **#1: Pipeliner User Account is required.**

You can use the API key for a free of charge during your 30-days free trial or during the Pipeliner subscription. However, you will need one Pipeliner user account in order to connect to Pipeliner from external source. It means that one Pipeliner license is required.

- **#2: Admin Role is required.**

The Pipeliner user you are using for connecting to Pipeliner must have the Admin role. In order to assign an admin role to a Pipeliner user, please perform following steps:

- Click on the "User" and select "Administration" from drop down menu.
- Click on "Users & Sales Units".
- Click on the "Edit" icon within the action column for the corresponding Pipeliner user.
- From the drop down menu pick the Standard user & admin role.
- Check the Sales Unit Membership as Member and click "Save".

For more information follow this link.

- **#3: API Key is required.**

In order to get API access and API Key, follow the steps below:

- Click on the "User" and select "Administration" from

- Click on “Sales Pipeline” and “API Access”
- From the main navigation menu click on the “Show API Access Details and use these details to connect your external source to Pipeliner.

2. You must have your unique [Marketo](#) account first.
3. You must sign up for [itDuzzit](#) account.
4. You must [connect Pipeliner](#) with itDuzzit.

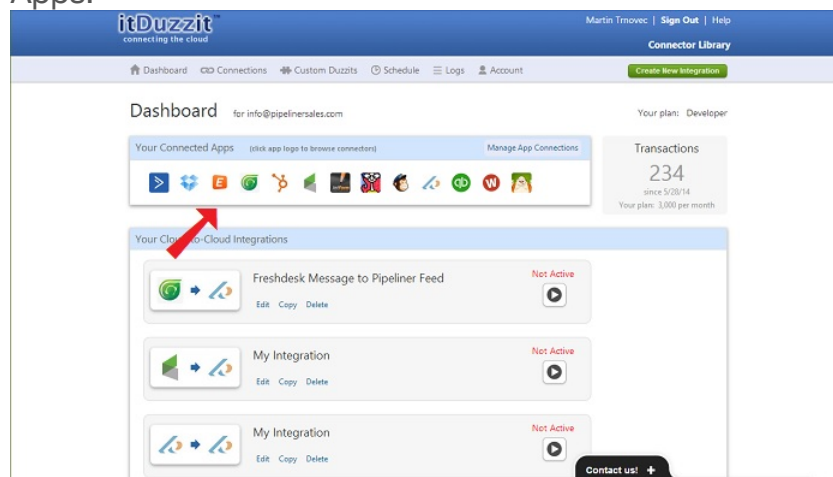
# Integrate Marketo with Pipeliner CRM

In order to start the integration Marketo with Pipeliner CRM, please sign in to your itDuzzit account first.

## Setup the Sync Profile

1. Go to **Connections** in itDuzzit.
2. Search for the Marketo and click on **Add Connection**.
3. Fill in your **Marketo API User ID, Key** and **SOAP Endpoint** and save.
4. You will be redirected back to the Connections.

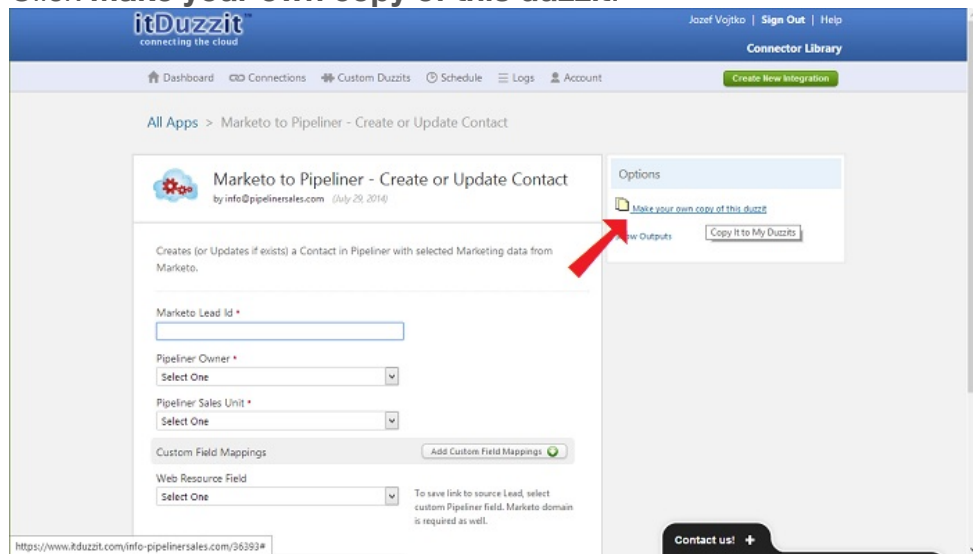
You can check, if Marketo has been added to list of Your Connected Apps.



# Create or Update Contact

Please note, that this is a temporary solution, that will consume one of your own integrations limit on itDuzzit. We are waiting for itDuzzit to approve this solution. Afterwards you will be able to use it without the need to create your own integration.

1. Click on [this link](#).
2. Click **Make your own copy of this duzzit**.

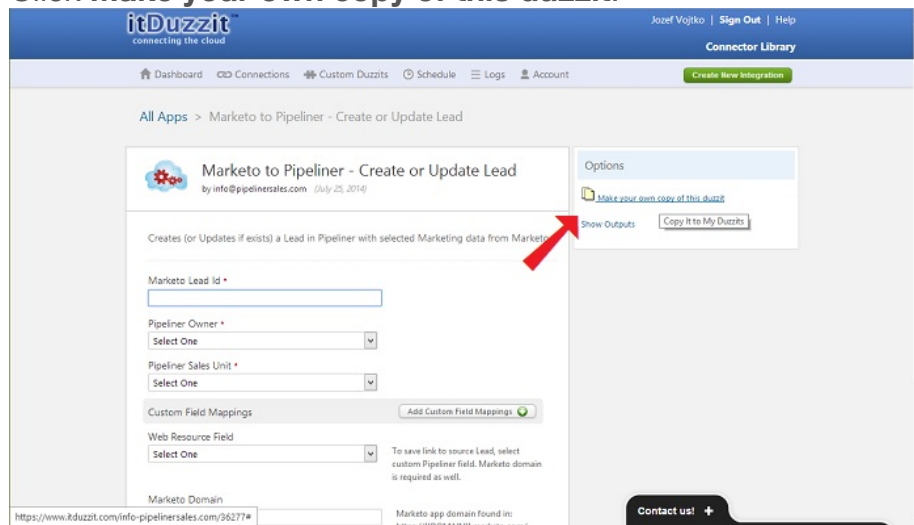


3. Click **Create new integration** from the main menu.
4. Select **Cloud-to-Cloud** Integration.
5. Choose Marketo from the list of available applications.
6. Select Marketo – **New or Updated Lead**.
7. Under „Do This“ Select My **Custom Duzzits** and browse for the Duzzit you have saved in the 2. step.
8. **Map the fields** and **Save** the integration.
9. To **activate** the integration please click on the „Play“ button next to the integration name.

# Create or Update Lead

Please note, that this is a temporary solution, that will consume one of your own integrations limit on itDuzzit. We are waiting for itDuzzit to approve this solution. Afterwards you will be able to use it without the need to create your own integration.

1. Click on [this link](#).
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3. Click **Create new integration** from the main menu.
4. Select **Cloud-to-Cloud** Integration.
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7. Under „Do This“ Select My **Custom Duzzits** and browse for the Duzzit you have saved in the 2. step.
8. **Map the fields** and **Save** the integration.
9. To **activate** the integration please click on the „Play“ button next to the integration name.





## About Pipelinersales Inc.

Pipelinersales Inc. develops CRM solutions to empower sales teams with the ability to manage the complexities of sales. Pipeliner CRM is the easy to use CRM tool, that increases sales productivity by improving the sales process framework.

For more information on Pipeliner CRM visit [pipelinersales.com](http://pipelinersales.com).

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