



List Sync with Marketo

Overview

The purpose of this document is to outline the required steps for configuring the List Sync API integration between Marketo and UnsubCentral:

[Key System Terms and Definitions](#)

[Provisioning an API Access Only user within Marketo](#)

[Enabling the LaunchPoint Integration within Marketo](#)

[Setting up a Data Fetch Transfer task within UnsubCentral](#)

[Setting up a Data Push Transfer task within UnsubCentral](#)

[Reviewing the List Sync history within UnsubCentral](#)

Need assistance? Please contact your UnsubCentral Account Manager or e-mail support at support@unsubcentral.com.

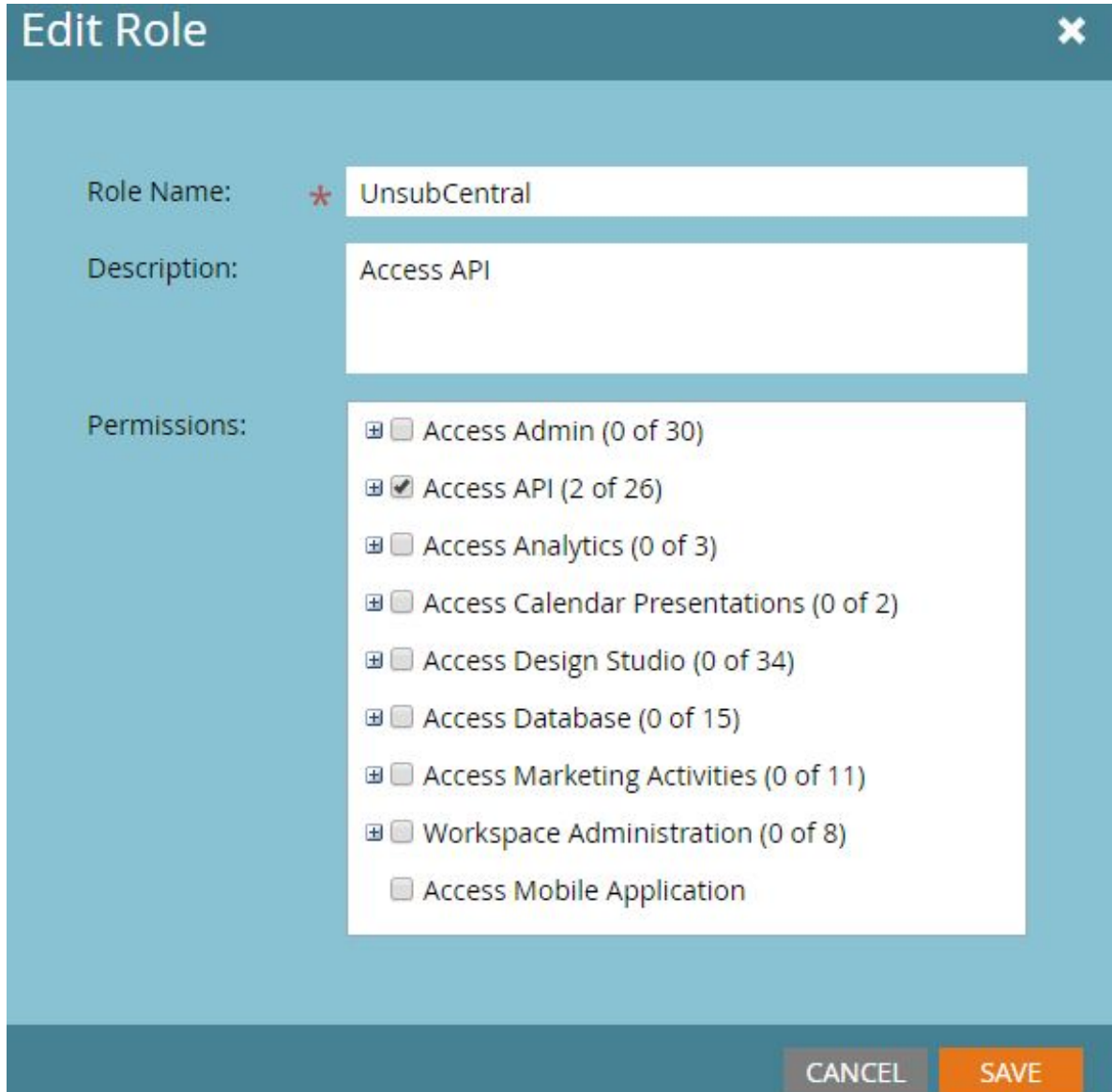
Integration Summary

UnsubCentral integrates with Marketo and other platforms to centralize and allow seamless syncing of email list data. Use UnsubCentral to house your unsubscribes and safely share list data between partners, ESPs, or your performance marketing platform.

List: A list is a database of email addresses. While this is frequently used as a database of emails to not send to as they have opted out, it can also be used as a database of emails for sending.

Provisioning an API Access Only user within Marketo

1. Click on the **Admin** option on the top right navigation bar of your Marketo site
2. Next, click on **Users & Roles** within the **Security** options
3. Now, click on the **Roles** tab and then **New Role**



The screenshot shows the 'Edit Role' dialog box with the following fields and options:

- Role Name:** UnsubCentral
- Description:** Access API
- Permissions:**
 - Access Admin (0 of 30)
 - Access API (2 of 26)
 - Access Analytics (0 of 3)
 - Access Calendar Presentations (0 of 2)
 - Access Design Studio (0 of 34)
 - Access Database (0 of 15)
 - Access Marketing Activities (0 of 11)
 - Workspace Administration (0 of 8)
 - Access Mobile Application

Buttons: CANCEL, SAVE

- Select **Access API** and then within the sub-options, **Read-Write Person** is the minimum required

4. Then, click on **Invite New User** and complete the form. Recommend using Unsubcentral in email field domain portion (this doesn't have to be a real email address) and you'll select the newly created **Role** within **Step 2: Permissions**

The screenshot shows the 'Invite New User' form at Step 1: Info. The progress bar at the top indicates Step 1: Info is active, Step 2: Permissions is next, and Step 3: Message is final. The form fields are as follows:

- Email: (marked with a red asterisk)
- First Name: (marked with a red asterisk)
- Last Name: (marked with a red asterisk)
- Reason:
- Access Expires: (with a calendar icon)

At the bottom right, there are two buttons: 'CANCEL' and 'NEXT'.

The screenshot shows the 'Invite New User' form at Step 2: Permissions. The progress bar at the top indicates Step 1: Info is completed, Step 2: Permissions is active, and Step 3: Message is final. The form fields are as follows:

- Roles: A dropdown menu is open, showing the following options:
 - Limited API Role
 - Marketing User
 - Standard User
 - UnsubCentral
 - UnsubCentral Test
 - Web Designer
- API Only:

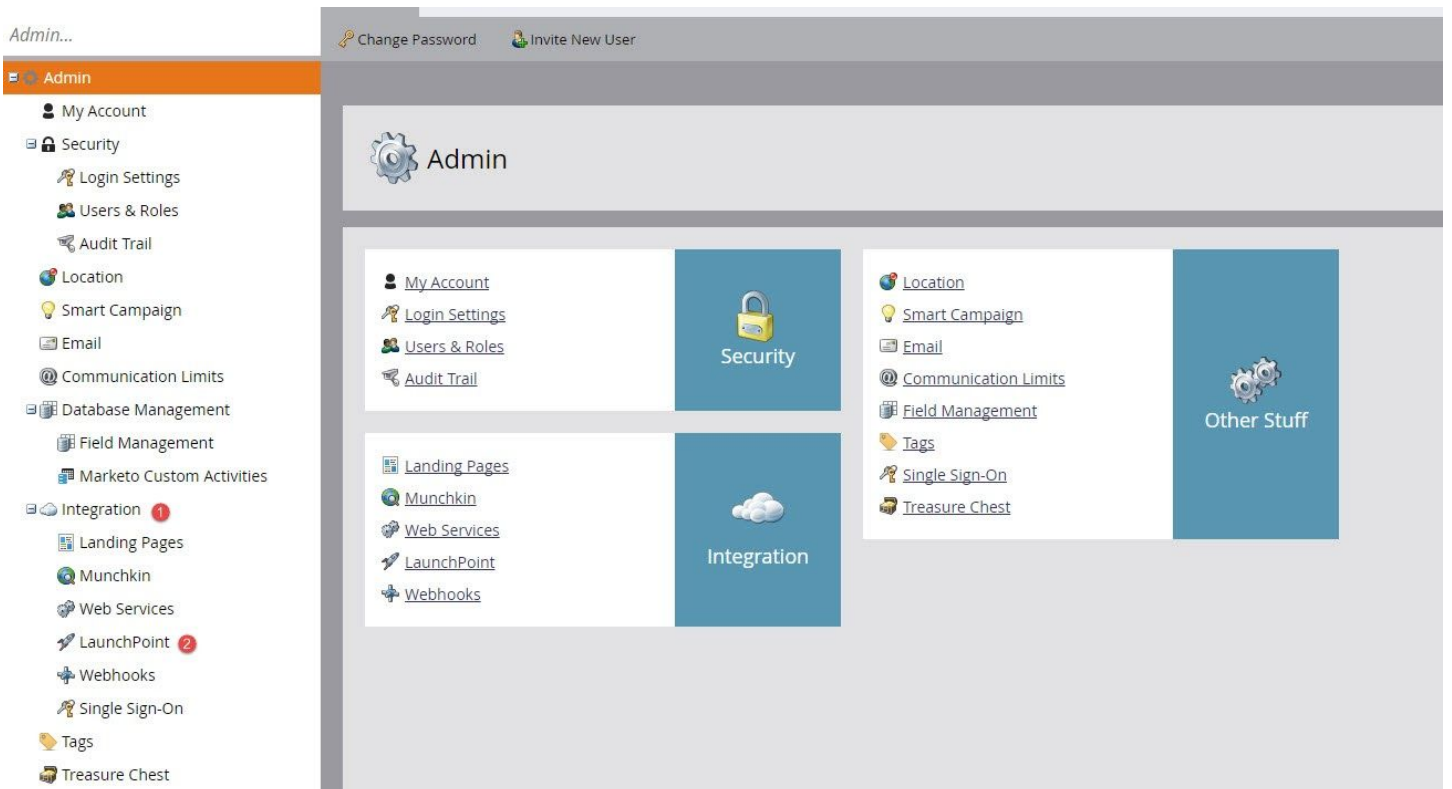
At the bottom right, there are three buttons: 'CANCEL', 'BACK', and 'NEXT'.

Enabling the LaunchPoint Integration within Marketo

1. Within the Marketo user interface, click **Admin** in the top right navigation section



2. Next, click the **Integration** section within the left navigation options and then click on **LaunchPoint**



- Now, within the **Installed Services** section of the **LaunchPoint** page, click on the first option **New**, then **New Service**

Name	Type	Used by	Status	Details
REST Service	Custom	0	Active	View Details
UC Integration	Custom	0	Active	View Details
UnsubCentral Integration	Custom	0	Active	View Details

- Next set a **Display Name**, **Description**, the **API Only User**, and also set the **Service** section to **Custom**

New Service [Close]

Display Name: *

Service: *

Settings

Description: *

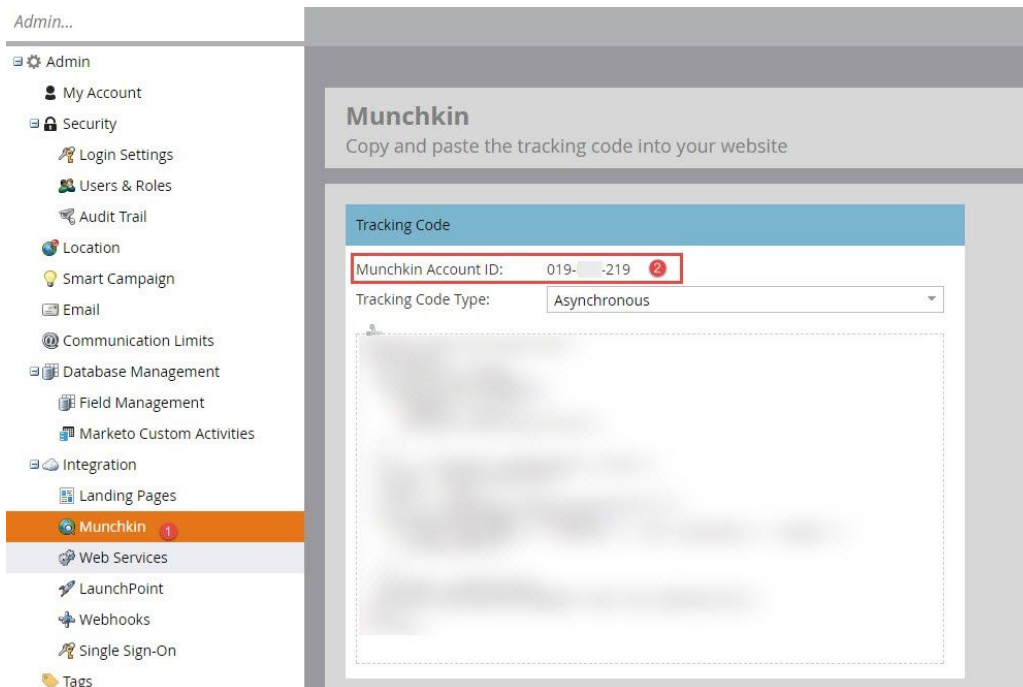
API Only User: *

[CANCEL] [CREATE]

- The newly created service will appear. Click the **View Details** option to obtain the required parameters (**Client ID** and **Client Secret**) for your **List Sync** configuration within UnsubCentral



- Next, you'll need to obtain the **Marketo Munchkin ID** within Marketo
 - Click the **Admin** option within top right navigation section, then open the **Integration** section and click **Munchkin** – please note your **Munchkin Account ID**



Setting up a Data Fetch Transfer task within UnsubCentral

1. Once logged into your UnsubCentral site, click on **Automation** and then **New Transfer**. Within **Transfer Type**, choose the last option named **ESP Integration Fetch**

The screenshot displays the 'Create Transfer' configuration page in UnsubCentral. On the left is a navigation sidebar with the following items: Dashboard, Lists, Keys, Affiliates, Alerts, Reports, Unsub Pages, Automation (with a red notification badge '1'), All Transfers (with a red notification badge '2'), New Transfer, App Admin, and Billing. The main content area features a progress indicator at the top with three steps: '1 Create Transfer' (active), '2 Source', and '3 Destination'. The active step is titled '1. Create Transfer' and includes a '*Required Fields' section. Under 'Transfer Type*', there are five radio button options: 'Internal UnsubCentral Fetch, This transfer will fetch a file from another UnsubCentral client account.', 'SFTP/FTP/FTPS Push. UnsubCentral will send a file to an external location.', 'SFTP/FTP/FTPS Fetch. UnsubCentral will fetch a file from an external location.', 'ESP Integration Push. UnsubCentral will send records to an external system.', and 'ESP Integration Fetch. UnsubCentral will fetch records from an external system.' The last option is selected. Below the radio buttons is a 'Transfer Name*' text input field.

2. Now, set the **Transfer Name**, **Days for Transfer to Run**, **Run Time** and those who should receive an **Email Notification**

Transfer Name*

Transfer Description

Days for Transfer to Run*

Daily

Weekly

Specific Days

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Run Time*

Hour

Minute

AM

Send Email Notifications to the following address(es)

Only send email notification if the transfer encounters an error.

3. When selecting **ESP Integration Fetch**, you must set the following **Source** options:
 - a. Set **integration** to **Marketo**, then use the **Client ID**, **Client Secret** and **Marketo Munchkin ID** obtained from Marketo earlier in the process
 - b. Pull the **Marketo List Identifier** from within Marketo, or click on **Load Lists** to see those that can be synced on the Marketo side
 - c. Specify the type of emails to fetch (**Unsubscribed** is the most common) and click **Save**

Log in to Marketo

Client ID*

Client Secret*

Marketo Munchkin ID*

Marketo List Identifier*

List

OR

Pick from Remote Lists

[Load Lists](#)

Email Handling

After importing, remove email addresses from Marketo [?](#)

Remove from Lead Database [?](#)

Remove from List only [?](#)

What kind of emails to fetch?*

Unsubscribed

Mailable

All

- Lastly, within the **Destination** step, specify which UnsubCentral List you'll sync with using the List drop down and then click on **Save**

1 Create Transfer > 2 Source > **3 Destination** > 4 Confirmation

3. UnsubCentral information

*Required Fields

Once UnsubCentral has the external emails *

Import file(s) into following UnsubCentral suppression list

Demo x ▾

Previous SAVE

Setting up a Data Push Transfer task within UnsubCentral

- Once logged into your UnsubCentral site, click on **Automation** and then **New Transfer**. Within **Transfer Type**, choose **ESP Integration Push**.

1 Create Transfer > 2 Source > 3 Destination

1. Create Transfer

*Required Fields

Transfer Type*

- Internal UnsubCentral Fetch. This transfer will fetch a file from another UnsubCentral client account.
- SFTP/FTP/FTPS Push. UnsubCentral will send a file to an external location.
- SFTP/FTP/FTPS Fetch. UnsubCentral will fetch a file from an external location.
- ESP Integration Push**. UnsubCentral will send records to an external system
- ESP Integration Fetch. UnsubCentral will fetch records from an external system

Transfer Name*

2. Now, set the **Transfer Name**, **Days for Transfer to Run**, **Run Time** and those who should receive an **Email Notification**

Transfer Name*

Transfer Description

Days for Transfer to Run*

Daily

Weekly

Specific Days

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Run Time*

Hour

Minute

Send Email Notifications to the following address(es)

Only send email notification if the transfer encounters an error.

- Next, within the **Source** step, specify which UnsubCentral List you'll be pulling emails from using the List drop down, set the **Address Option** (most common is **Activated**) then click on **Save**

✓ Create Transfer

2 Source

3 Destination

2. UnsubCentral information

*Required Fields

Push the following UnsubCentral suppression list* ⓘ

ListID10 x ▾

Address Options*

- Activated Emails
 Deactivated Emails

Previous

NEXT

4. When selecting **ESP Integration Push**, you must set the following **Source** options:
- Set **integration** to **Marketo**, then use the **Client ID**, **Client Secret** and **Marketo Munchkin ID** obtained from earlier in the process
 - Pull the **Marketo List Identifier** from within Marketo, or click on **Load Lists** to see those that can be synced on the Marketo side
 - Specify the type of emails to fetch (**Unsubscribed** is the most common) and click **Save**

Integration*

Log in to Marketo

Client ID*

Client Secret*

Marketo Munchkin ID*

Marketo List Identifier*

List

OR

Pick from Remote Lists

[Load Lists](#)

Email Handling

Only update emails that exist on Marketo [?](#)

What type of records are you sending?*

Unsubscribed

Mailable

Reviewing the List Sync history within UnsubCentral

1. After completing the List Sync setup process, you can view the task and history by clicking on **All Transfers** and then the **Transfer Name** or make changes by clicking on **Edit**

All Transfers

Run Now Delete

Marketeto Demo

ID	TRANSFER NAME	LIST NAME	STATUS	TYPE	LAST RUN	NEXT RUN	ACTIONS
7	Marketo Demo	ListID13	Enabled	ESP Integration Fetch	Feb 6, 2018 12:00 AM	Feb 6, 2018 12:00 AM	Disable Edit

Showing 1 of 1 items

2. Now, within the **Transfer Activity** page, you can see the **Status**. Click on **More Info** to see the total records pulled or fetched for the individual task executed

Transfer Activity

STATUS	STARTED	FINISHED	RECORDS TRANSFERRED	ACTIONS
Succeeded	2/1/18 12:00 AM	2/1/18 12:00 AM	0	More Info
Succeeded	1/31/18 4:27 PM	1/31/18 4:28 PM	2	More Info

Details for Transfer Run on 1/31/18 4:27 PM

1 files in this transfer

Records in Transfer: 2

Status: Succeeded

Invalid Records: 0

Records Added: 2

Showing 2 of 2 items