



# Infor CRM Implementation Guide

Appendix E: Integrations  
Marketo

## Marketo

Marketo for the Infor CRM Web Client provides an integration between select versions of Infor CRM and Marketo, the world leader in Marketing automation. When Marketo Integration is installed, Infor CRM users can leverage valuable marketing and activity-related data for leads and contacts that can assist with business solutions. Marketo Marketing data provides visibility into the types of promotional materials customers may respond to the most. Infor CRM users can use this data to assist with closing opportunities and determining the level of engagement of their leads.

The key features include:

- Two-way synchronization for Leads
- Two-way synchronization for Contacts
- One-way synchronization for Opportunities
- One-way synchronization for Accounts
- One-way synchronization for Users

When the Marketo Integration is installed and configured, Infor CRM users who have appropriate permissions can see a Sales Insight tab on the Infor CRM Contact, Lead, and Marketo Lead Detail views.

## System Requirements

- Marketo does not require any additional system requirements beyond those required for Infor CRM v8.4. Compatibility information for Infor CRM v8.4 is available in the Infor Online Compatibility Matrix (OCM).
  1. Log on to the Infor Xtreme Portal web site: [www.infor.com/inforxtreme](http://www.infor.com/inforxtreme).
  2. Expand the Environment menu, and then click Online Compatibility Matrix.
  3. Click Help for a video explaining the features of the OCM.
- Marketo is installed by default when you install Infor CRM v8.4. This document explains how to configure the Marketo integration after Infor CRM v8.4 is installed. For information about installing Infor CRM, see the Infor CRM Implementation Guide.
- Marketo permits a maximum number of 150,000 API calls in one day. If that number is exceeded, the synchronization activities between Infor CRM and Marketo will fail.

## Configuring the Marketo Integration

If your organization will be using the Marketo integration, configure the integration to enable user access.

To configure:

1. Sign in to the Infor CRM Web Client as the Administrator.
2. In the Navigation bar, expand Administration, Integrations.
3. On the Integrations List view, select Marketo.
4. Select the Enabled check box.
5. In the Integration - Marketo Detail view, select the Options tab and enter data in the following required fields:
  - In the URL field, paste the API end point provided by Marketo.
  - In the ClientID field, paste the Client ID you received from Marketo.
  - In the Secret field, paste the Secret key you received from Marketo.
  - The following fields are also available:
    - MQL List Name - Qualified leads
    - Auto Link Accounts: If set to true allows accounts to be automatically pushed to Marketo.
    - Auto Link Opportunities: If set to true allows Opportunities to be automatically pushed to Marketo
    - Lead Change Paging Token: Data value does not need to be modified. (The only exception would be if the Admin wanted to purge the data and reload the activities for another 30 days of work).
    - Activity Page Token: Data value does not need to be modified. (The only exception would be if the Admin wanted to purge the data and reload the activities for another 30 days of work).
    - Static List Page Token: Data value does not need to be modified. (The only exception would be if the Admin wanted to purge the data and reload the activities for another 30 days of work) - Does not apply for this release
6. Click Save.

## Running a Synchronization Cycle

You must now run an Activity job to synchronize the default Marketo Activity types from Marketo to Infor CRM.

To run the sync:

1. On the Navigation Bar, click Administration, and then click Job Manager.
2. Click the Definitions tab.
3. Scroll down to locate Marketo - Execute Single Task.
4. Right click and click Create Schedule.
5. In the Run/Schedule Job box, in the Parameters grid, double-click in the Value column next to Marketo Task to Run, type the parameter Pull Activity Types and then click OK.
6. When the Job has completed successfully, click Close.

## Assigning the Marketo Role to Users

The Marketo Integration with Infor CRM adds a new role to Infor CRM. The new role is named Infor CRM-Marketo User and it adds new secured actions that control user access to the Marketo feature:

- Entities/Account/Delete from Marketo – Allow deleting a promoted Marketo Account
- Entities/Account/Promote to Marketo – Allow promoting an Account to Marketo
- Entities/Marketo Leads/View – Ability to view Marketo Leads
- Entities/Marketo Session Log/View – Ability to view the Marketo session logs under Administration
- Entities/Opportunity/Delete from Marketo – Allows for the deletion of a Marketo Opportunity
- Entities/Opportunity/Promote to Marketo – Allows for promotion of an Opportunity to Marketo
- Entities/User/Delete from Marketo – Allows for the deletion of a Marketo Sales Person
- Entities/User Promote to Marketo – Allows promotion of a User to Marketo

You must assign this new role to each user who will be assessing Marketo. For information about assigning roles to users, see the Infor CRM Web Client online help topic named Roles Tab.