

Introduction

Openprise provides an out-of-the-box connector for Marketo. In addition to this document, we recommend you view the tutorial video at: <https://youtu.be/Bh8HnKqH2Ag>

Configuring Openprise to import data from Marketo using the Marketo API involves the following steps:

1. Generate an authentication token in Marketo.
2. Configure Openprise Data Source

Marketo Configuration

First you need to perform the following in Marketo:

1. Create an API role
2. Create an API user and assign API role
3. Create a custom service
4. Get client ID and secret
5. Get endpoint and identity URL

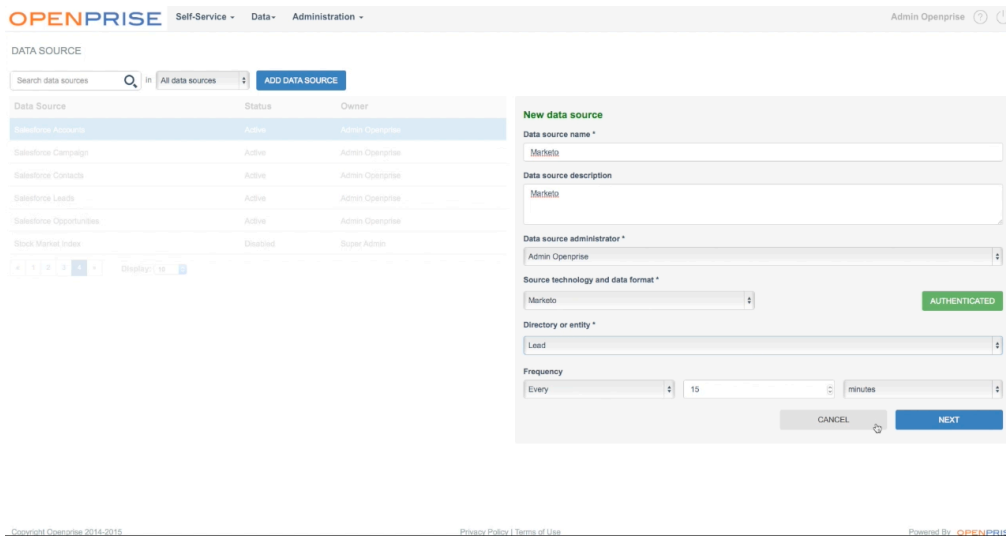
You can find the detailed instructions from Marketo here:

<http://developers.marketo.com/blog/quick-start-guide-for-marketo-rest-api/>

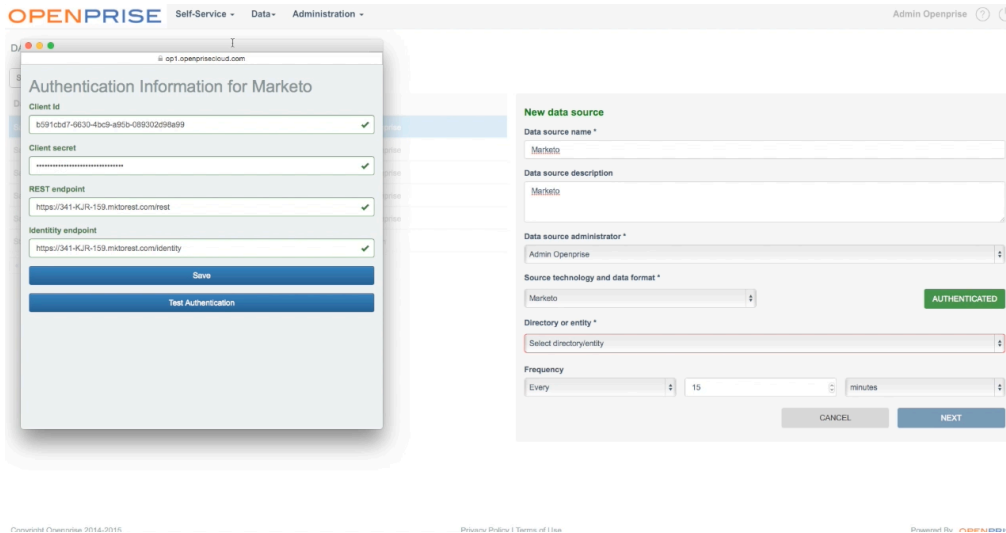
Openprise Configuration

To create a data source, select Data Source under the Data menu. If you need more details about data source configuration in general, see the tutorial video on data source configuration with the Google Drive example: <https://youtu.be/kMdFj0cwVXY>

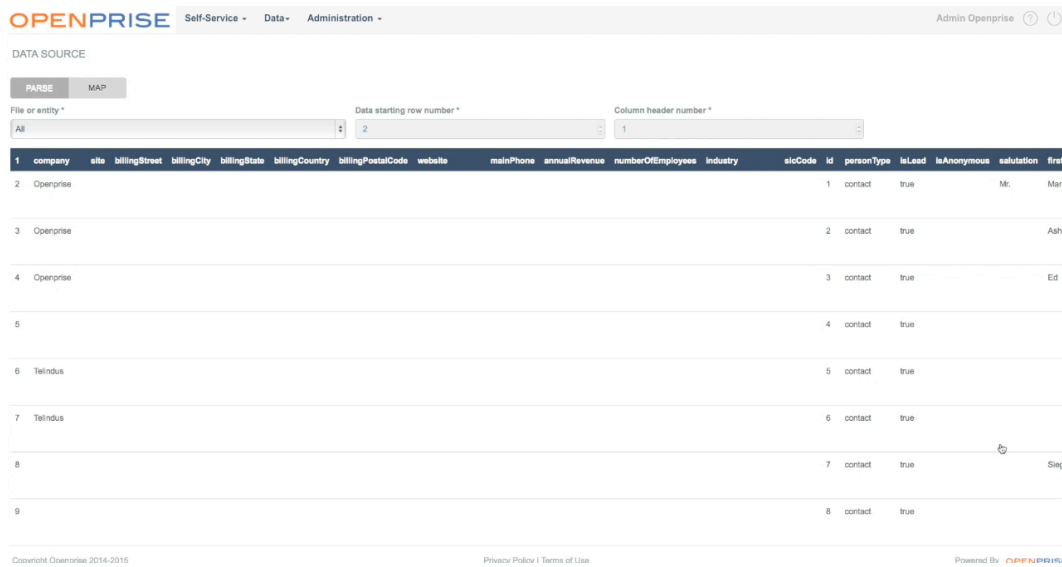
1. Provide the basic information: data source name, description, and administrator.
2. For source technology and data format select Marketo.



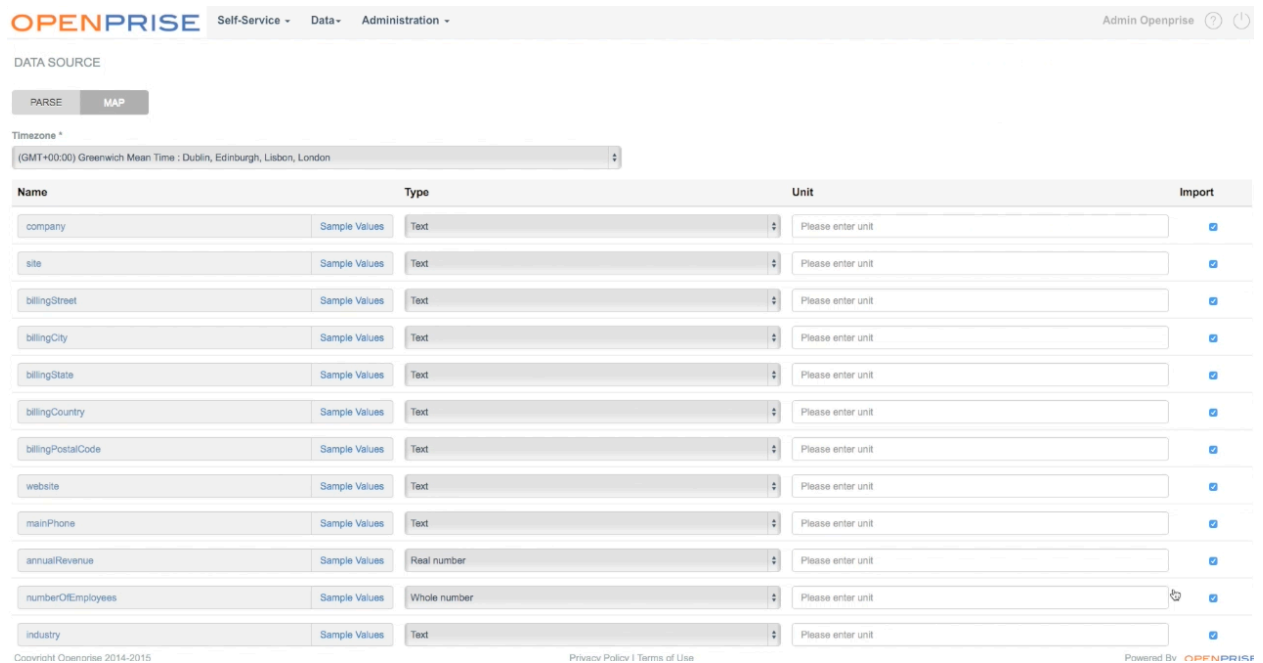
3. Press the AUTHENTICATE button to enter the security credential and endpoint information you gathered in Marketo from the above instructions.
 - a. In the pop-up window you see 4 boxes where you can enter the Client ID, Client Secret, and the two endpoint URLs.
 - b. You can test your authentication credential inside this window. When you are done, press SAVE and close the window.



4. Select the Lead entity to import.
5. Specify how often you would like Openprise to check for updates.
6. Press NEXT to go to the Parse step.
7. Since this is an application specific connector, Openprise has already fetched all the necessary information about the list of available attributes from Marketo. Make sure the 50 test records look like they are properly parsed, then press CONTINUE to advance to the Map step.



8. Openprise has already fetched all the information, so on the Map screen you can only:
 - a. Unselect the attributes you do not want to import
 - b. Add unit information for any numerical attribute



9. You are done. Press the FINISH button. After a few seconds, you arrive back at the Data source screen and your new Marketo data source is ready to import data at the next scheduled time.