

 **built.io**[®] flow

for


Marketo[®]

Integrate business apps with Built.io Flow

Built.io Flow is an **integration Platform-as-a-Service (iPaaS)** that enables organizations to integrate and orchestrate business processes across multiple systems. You can quickly build and deploy complex flows that encompass on-premise systems, cloud applications, Internet of Things (IoT) devices, and more. Equipped with more than 300 pre-built activities from 100 web services/apps, this solution makes it easy to enable integration between business application.

Built.io Flow helps you connect with and share data among some of the most popular business apps, such as Dropbox, Zoho, Salesforce, MailChimp, SurveyMonkey, Evernote, Facebook, and Twitter.

You simply need to define your flows and triggers; Built.io Flow will do the rest for you.

Built.io Flow for Marketo Integration

While organizations of all sizes employ world-class systems to handle various business requirements, most face challenges in linking these systems and integrating the data silos. **Marketo's** best-in-class cloud-based marketing automation software enables businesses to engage potential customers and drive revenue. However, creating a connection between marketing systems and various other business operations, such as CRM, sales, help-desk, and more, still remains a challenge.

This is where **Built.io Flow** enters the picture. **Built.io Flow** automates all **Marketo** tasks as well as integrates them with third-party services. With **Built.io Flow**, businesses can align their marketing solutions with other SaaS and on-premise apps, thereby enhancing the overall organizational collaboration and sales effectiveness.

The Built.io Flow for Marketo integration enables you to easily:

- Fetch any Marketo leads, campaigns, opportunities, email templates, and folders, and send the data to third-party apps/services for integration.
- Create, Update, delete and leads, campaigns, opportunities in your Marketo account.
- Seamlessly sync content from other web services into Marketo.

And you can do much more. Here's how.

Integrating Built.io Flow with Marketo

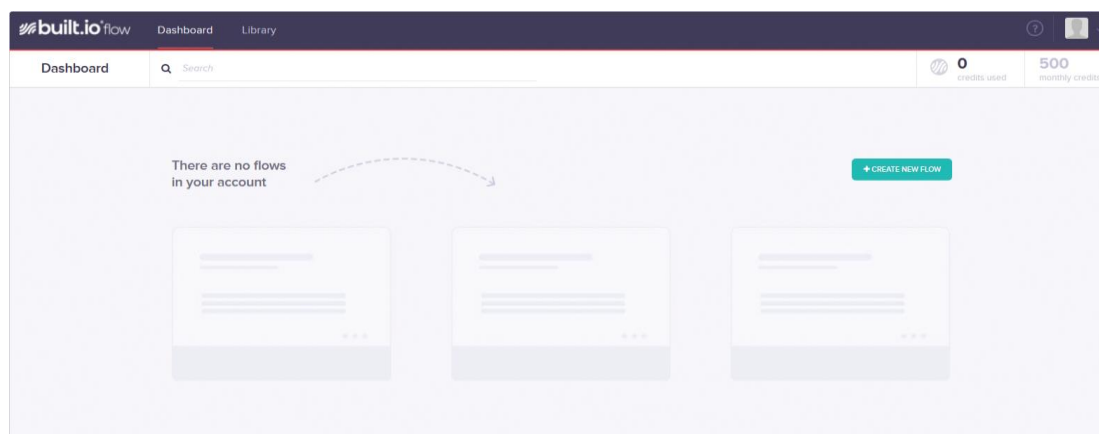
Let's look at a simple flow to understand how Built.io Flow and Marketo integration can boost the productivity of your business operations. In this flow, we will automate the process of getting a particular lead from Marketo and saving the lead details in Evernote.


Step 1. Get a Built.io Flow account

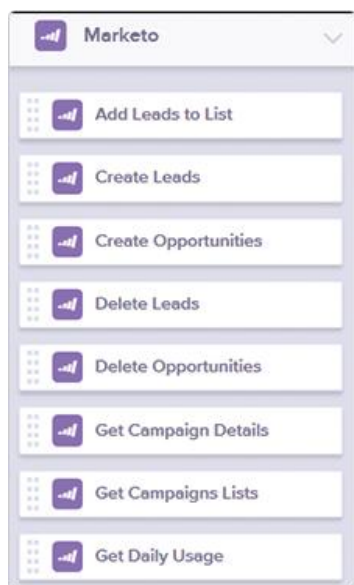
If you already have an account with Built.io Flow, log in to flow.built.io using your credentials. Else, you can request access to the Beta version by visiting [this page](#).

Step 2. Add Marketo activity to canvas

Since you haven't created any flows, your dashboard will look like this.



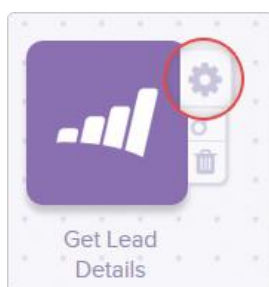
Click on the  link to create a new flow. As soon as you click on this button, you will notice a blank dashboard, with **'Start'** and **'Stop'** icons on it. This is your flow workspace, or canvas, where you will create your own flows by adding activities. Built.io Flow provides several ready-to-use activities so that you can quickly integrate your favorite apps/service with Built.io Flow. Among the list of activity categories, look for **Marketo**.



You will find a number of activities listed under **Marketo**. These activities are various actions you can perform in Marketo.

If you would like to find the details of a particular lead that you had created earlier in Marketo, Search for the **'Get Lead Details'** activity under **Marketo**. Drag and drop this activity in your canvas anywhere between **'Start'** and **'Stop'**.

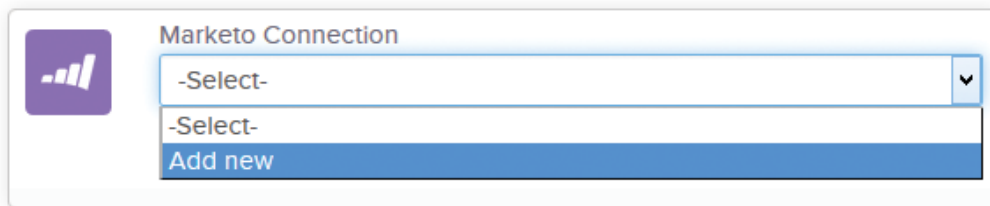
Step 3. Configure Marketo Activity



When you hover on this activity, three smaller icons will appear. Click on the top (**Settings**) icon to configure this activity.

Step 3.1. Establish connection

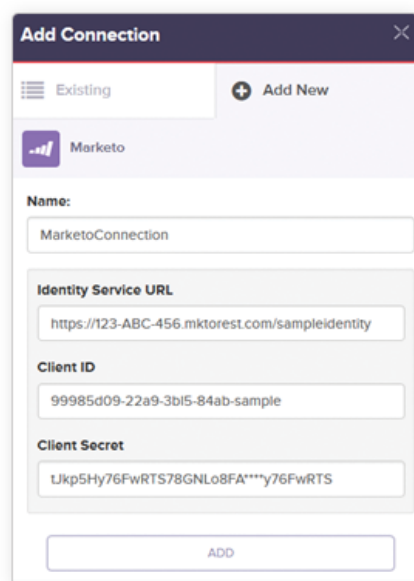
In order to authorize Built.io Flow to access your resources in Marketo, it's important to establish a connection with Marketo. In the activity setting page, under Marketo connection, select the **'Add New'** dropdown option.



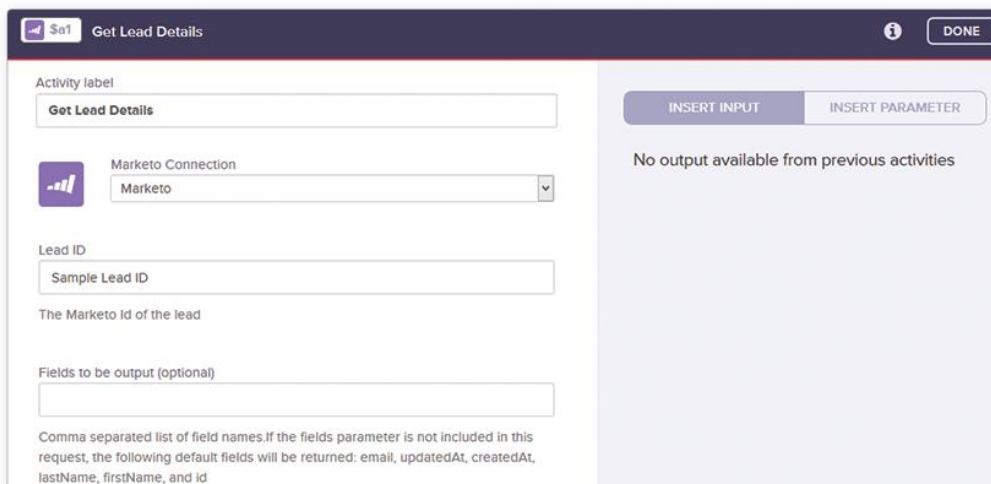
Since you haven't added any connections as a new user, you won't see any connections under the **'Existing'** tab. To add a new connection, click on the **'Add New'** tab on the right. Here, under Marketo, you will notice three mandatory fields: **Identity Service URL**, **Client ID**, and **Client Secret**.

You can find the **'Identity Service URL'** in your Marketo admin panel, under the **'Web Services'** section. To get the **'Client ID'** and **'Client Secret'**, you need to create a **User Role** and a **New Service** from the Marketo admin panel. After entering the required details, click on **'Add'**. This will create a new entry in the dropdown list under Marketo Connection. Select the newly created **Marketo** connection.

Step 3.2. Add the details



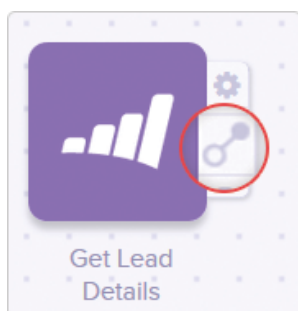
In the **'Lead ID'** field, specify the Marketo ID of the lead that you wish to retrieve. In the **'Fields to be output'** field, enter the name of the fields whose value you want to include in the output. The fields could be email, updatedAt, createdAt, lastname, firstName, and ID. If you leave this field blank, it will include all the above-mentioned fields in the response.



Once you are done with entering these details, click on 'Done', and return to the Built.io Flow canvas.

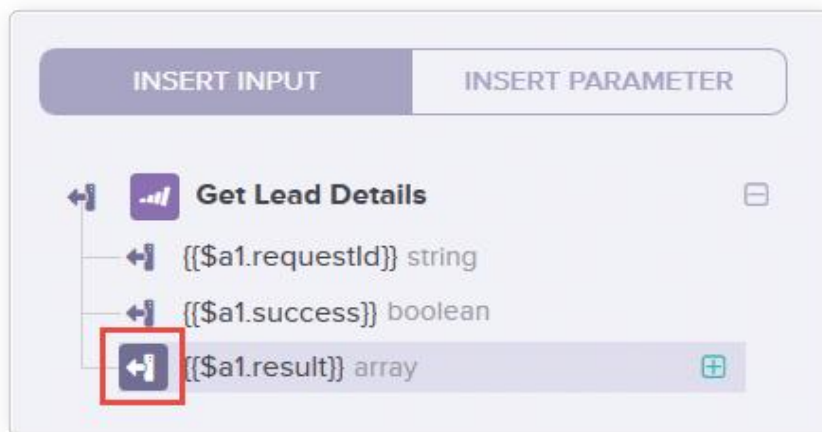
Step 4. Create Flow

The first activity, '**Get Lead Details**', will retrieve the required details of the provided Marketo lead. The second activity you add will save these details in **Evernote**. In the list of activity categories, look for Evernote, and drag '**Create Note**' onto the canvas. Create a connection from 'Get Lead Details' to 'Create Note' by using the '**Connect Activity**' icon.



Next, click on the '**Settings**' button of the Evernote 'Create Note' activity to configure it, and select the appropriate access token.

Provide a suitable title for the note (E.g., Marketo lead details). Since we want the details of the Marketo lead in the body of the Evernote note, we will insert the result object of the 'Get Lead Details' activity in the '**Body**' field. To do this, select the insert icon beside the result object located under 'Insert Input' on the right side of the page.



Once you are done with this, click on **'Done'** and return to your canvas. It's now time to connect all these activities. To do this, hover on the 'Start' icon, and use the 'Connect Activity' icon to drag a line from 'Start' to the 'Get Lead Details' activity. Similarly, connect all the icons in such a way that the flow looks like the one shown in the image below.



The flow is now connected from start to stop, with all the necessary activities in between. Click on the 'Test' button located on top right corner of the page to test run the flow. Within seconds of clicking the test button, Built.io flow will get the details of the required lead from your Marketo account and create a new note in Evernote containing the required details.

Built.io Flow makes it easy to create complex flows and automate all your business needs.

Contact

If you have any questions about the way Marketo Integration works, or want us to add any custom third-party service activity, send us an email at support-flow@built.io.

Learn more about what Built.io Flow can do for your business by visiting our website: flow.built.io.