



# Optimized Sales & Marketing Setup Guide

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This document details the steps required to integrate Optimized Sales & Marketing (OSM) with Marketo. OSM uses this integration to read data from Marketo. There are four major parts to setting up this integration.

1. [System Requirements](#)
2. [Installation Steps](#)
  - [Create an API-Only User Role](#)
  - [Create an API-Only User](#)
  - [Create a New LaunchPoint Service Integration](#)
  - [Create a View-Only User](#)
3. [Validation](#)
4. [Troubleshooting](#)

## 1. System Requirements

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The following steps require Admin privileges in your Marketo instance.

You can find more documentation on Marketo Users and Roles [here](#).

## 2. Installation Steps

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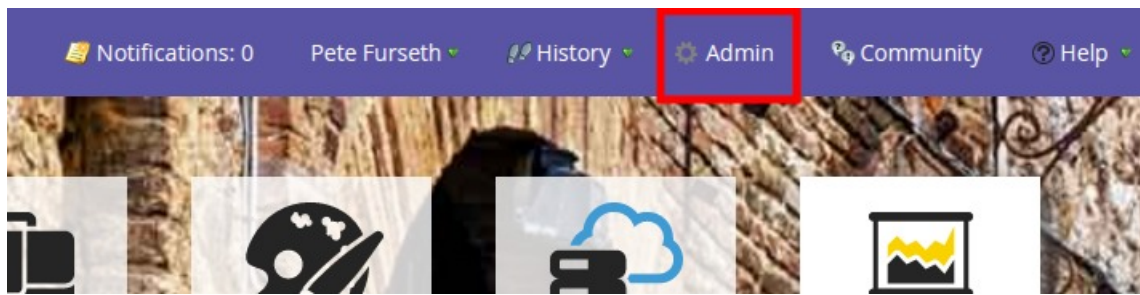
The following installation steps are required to set up Optimized Sales & Marketing's (OSM) integration with Marketo.

### 2.1: Creating an API-Only User Role

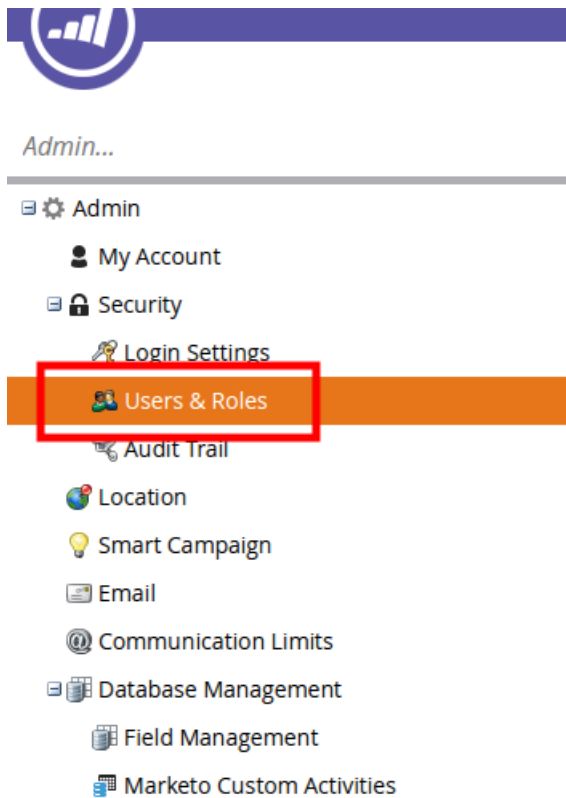
Follow these instructions to create an API-Only user role in Marketo that will be assigned to the Optimized Sales & Marketing (osm) API user to query Marketo data. This is a read-only user role, OSM does not write anything into Marketo.

#### 2.1.1. Login to Marketo

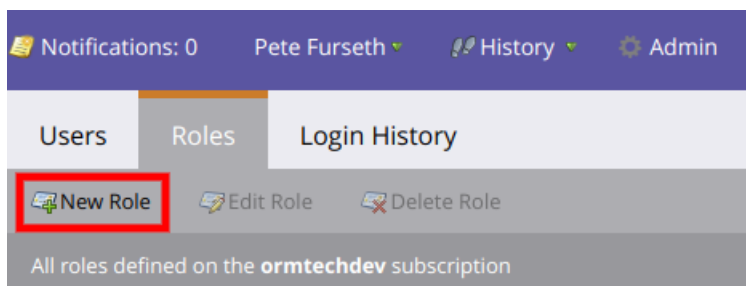
#### 2.1.2. Click Admin Link



### 2.1.3. Go to *Users & Roles* in the Security admin section



### 2.1.4. Create a New Role



### 2.1.5. Grant Appropriate Read-Only Permissions

- **Role Name:** OSM API Read-Only
- **Description:** This role is used by OSM integration.
- **Permissions:** Expand "Access API" and check the following options:
  - Read-Only Activity
  - Read-Only Assets
  - Read-Only Campaign

- Read-Only Person
- Click the CREATE Button

**Edit Role** [X]

Role Name: \* OSM API Read-Only

Description: This role is used by OSM integration.

Permissions:

- Access API (5 of 28)
- Activate Campaign
- Approve Assets
- Deactivate Campaign
- Execute Campaign
- Read-Only Activity
- Read-Only Activity Metadata
- Read-Only Assets
- Read-Only Campaign

CANCEL SAVE

## 2.2: Create an API-Only User

Follow these steps to create the OSM user that will access Marketo data via API.

2.2.1. Under *Users* tab in the *Admin* -> *Users & Roles* section, click "Invite a New User"

Notifications: 0 Pete Furseth History Admin Cor

Users Roles Login History

Invite New User Edit User Delete User Reset Password

All users who have access to the ormttechdev subscription

Name	Email	Login	Role	Reason
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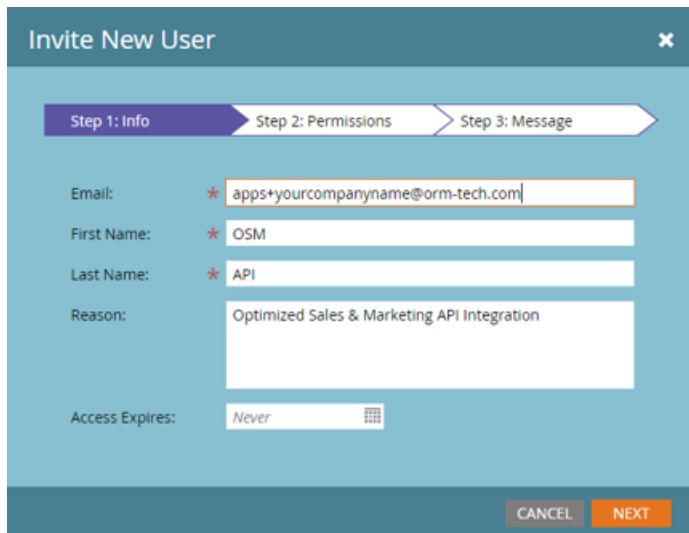
### 2.2.2. Create New User with API-Only Permissions

Step 1: Info

The email should be `apps+yourcompanyname@orm-tech.com`, where "yourcompanyname" is your company's name.

- **Email:** apps+yourcompanyname@orm-tech.com
- **First Name:** OSM
- **Last Name:** API
- **Reason:** Optimized Sales & Marketing API Integration
- **Access Expires:** Never (default)

Click the NEXT button



The screenshot shows a dialog box titled "Invite New User" with a close button (X) in the top right corner. Below the title bar is a progress indicator with three steps: "Step 1: Info" (highlighted in purple), "Step 2: Permissions", and "Step 3: Message". The form contains the following fields:

- Email:** A text input field with a red asterisk and the value "apps+yourcompanyname@orm-tech.com".
- First Name:** A text input field with a red asterisk and the value "OSM".
- Last Name:** A text input field with a red asterisk and the value "API".
- Reason:** A text area containing the text "Optimized Sales & Marketing API Integration".
- Access Expires:** A dropdown menu with the value "Never" and a grid icon to its right.

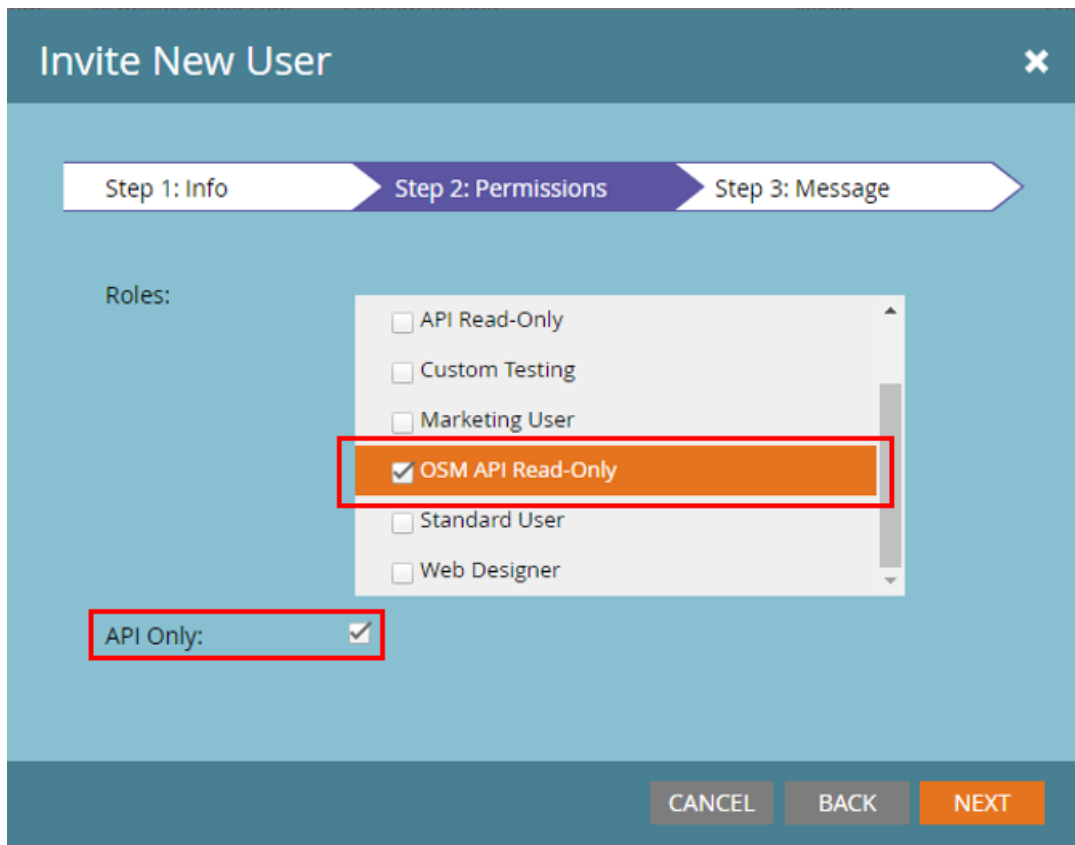
At the bottom right of the dialog box are two buttons: "CANCEL" and "NEXT".

Step 2: Permissions

Check the boxes for:

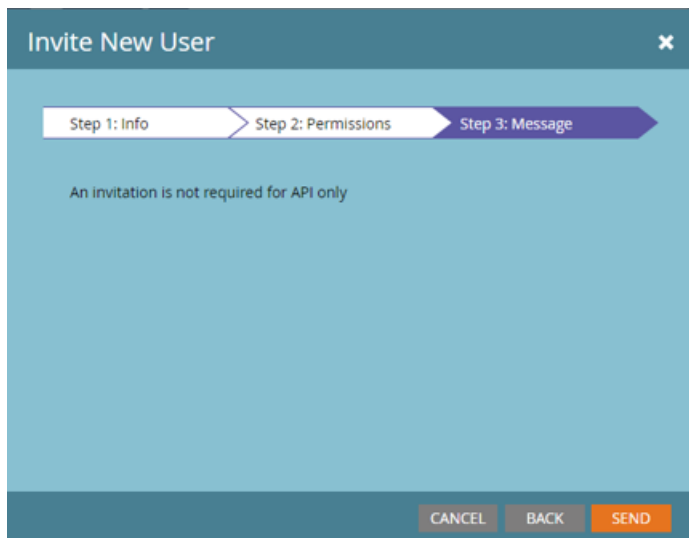
- **OSM API Read-Only**
- **API Only**

Click the NEXT button



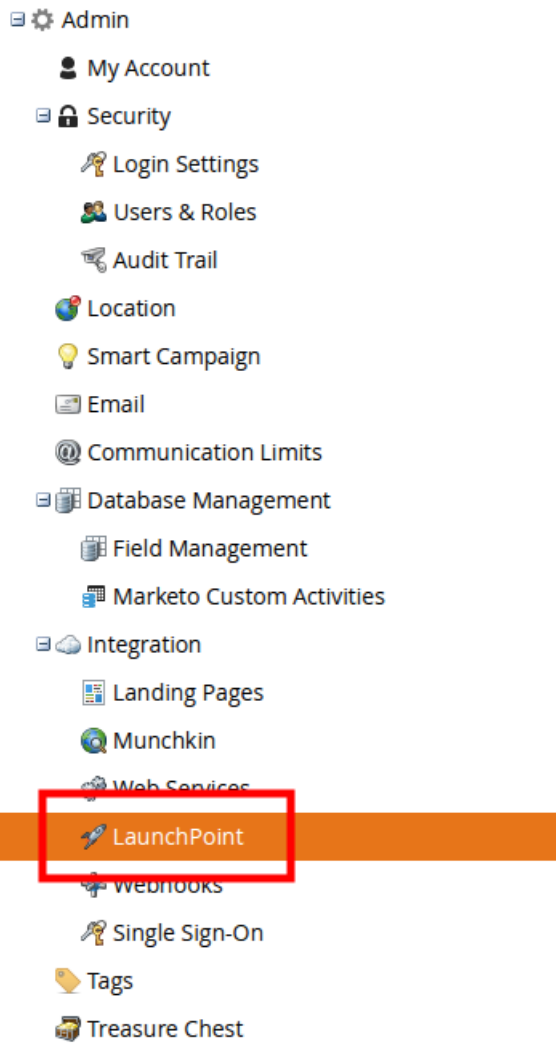
Step 3: Message

Click the SEND button to create the new user.

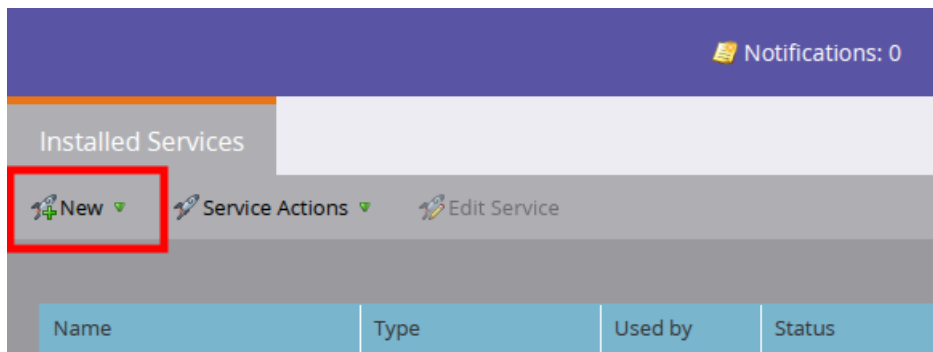


## 2.3: Create a New LaunchPoint Service Integration

2.3.1. Go to *LaunchPoint* under *Admin* -> *Integration*



2.3.2. Under the *Installed Services* tab click "New" to create a new LaunchPoint service.



### 2.3.3. Configure New Service

Assign the OSM API Read-Only user created in [Section 2.2](#) to this service.

- **Display Name:** OSM Integration
- **Service:** Custom
- **Description:** Optimized Sales & Marketing Integration
- **API Only User:** [apps+yourcompanyname@orm-tech.com](mailto:apps+yourcompanyname@orm-tech.com)

Click the CREATE button

## New Service ✕

Display Name: \*

Service: \*

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Settings

Description: \*

API Only User: \*

2.3.4. Click "View Details" of the newly created service

Name	Type	Used by	Status	Details
OSM Integration	Custom	0	Active	<a href="#">View Details</a>

2.3.5. Copy Client Id and Client Secret

Copy Client Id and Client Secret to a temporary document that you will share with your Optimized Sales & Marketing Customer Success Manager.

# Details



Client Id: 34355E30-9993-4843-a3e5-dc787e9873cd

Client Secret: f71228Qr58bAq5CDE5c7M9FOvgv38fUkdr8

Authorized User: apps+yourcompanyname@orm-tech.com

GET TOKEN



CLOSE

## 2.3.6. Go to *Web Services* under *Admin* -> *Integration*

Admin...

Admin

My Account

Security

Login Settings

Users & Roles

Audit Trail

Location

Smart Campaign

Email

Communication Limits

Database Management

Field Management

Marketo Custom Activities

Integration

Landing Pages

Munchkin

Web Services

LaunchPoint

Webhooks

Single Sign-On



### 2.3.7. Copy REST API Endpoint and Identity URL

Copy Endpoint and Identity URLs to the temporary document that you will share with your Optimized Sales & Marketing Customer Success Manager.



### 2.3.8. Email Configuration to OSM Customer Success Manager

Email the configuration values you copied to your Optimized Sales & Marketing Customer Success Manager to complete the system setup. Your Customer Success Manager will notify you once your OSM system is successfully configured.

The values are:

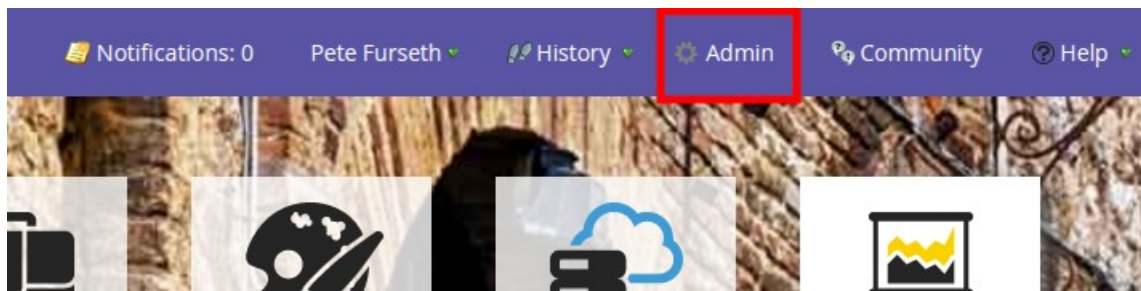
- Client ID and Client Secret from 2.3.5. Copy Client Id and Client Secret
- REST API Endpoint and Identity URLs from 2.3.7. Copy REST API Endpoint and Identity URL

## 2.4: Creating a View-Only User

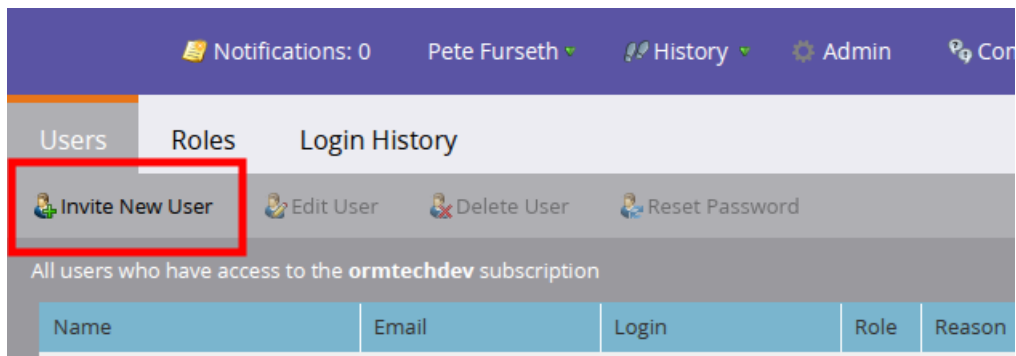
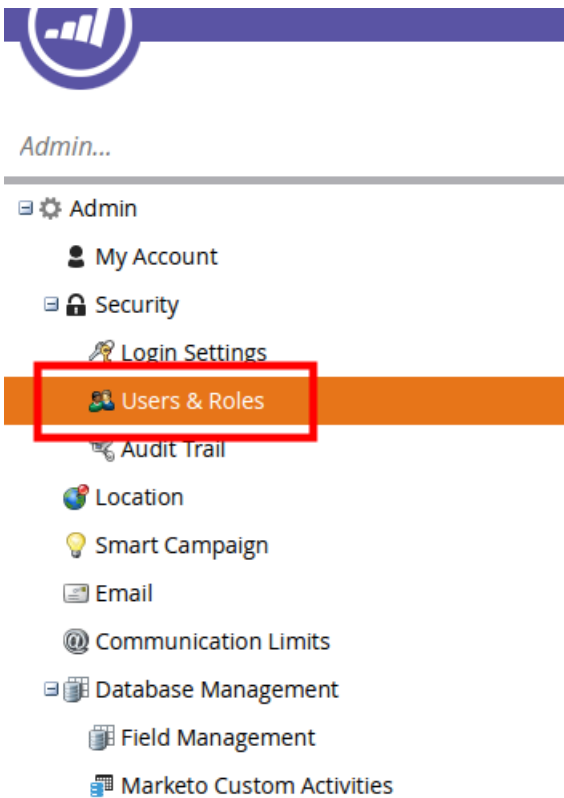
This user will allow your Optimized Sales & Marketing Customer Success Manager to validate your OSM system by inspecting the data in OSM and comparing it to what is in your current Marketo instance.

### 2.4.1. Login to Marketo

### 2.4.2. Click Admin Link



### 2.4.3. Under *Users* tab in the *Admin* -> *Users & Roles* section click "Invite a New User"



#### 2.4.4. Create View Only User

Step 1: Info

Email address should be `admin+yourcompanyname@orm-tech.com`, where "yourcompanyname" should be your company's name.

- **Email:** [admin+yourcompanyname@orm-tech.com](mailto:admin+yourcompanyname@orm-tech.com)
- **First Name:** OSM
- **Last Name:** View Only
- **Reason:** Optimized Sales & Marketing View Only User
- **Access Expires:** Never (default)

Click the NEXT button

## Invite New User ✕


Step 1: Info **Step 2: Permissions** Step 3: Message

Email: \* admin+companyname@orm-tech.com

First Name: \* OSM

Last Name: \* View Only

Reason: Optimized Sales and Marketing View Only User

Access Expires: Never 

CANCEL NEXT

Step 2: Permissions

Select Standard User

Click the NEXT button

## Invite New User ✕

Step 1: Info Step 2: Permissions **Step 3: Message**

Roles:

- API Read Only
- API Role
- Marketing User
- Standard User
- Tableau API Access Role
- Web Designer

API Only:

CANCEL BACK NEXT

Step 3: Message

Click the SEND button

### 3. Validation

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Upon completing all the steps outlined in [Section 2 - Installation Steps](#), your Optimized Sales & Marketing Customer Success Manager will validate that the integration is working as expected.

### 4. Troubleshooting

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If you have any questions please contact your Optimized Sales & Marketing Customer Success Manager or email us at [help@orm-tech.com](mailto:help@orm-tech.com).

