

# How to integrate Marketo with Outgrow calculator or quizzes

## Overview

With the Outgrow and Marketo integration, you will now be able to pass Outgrow calculator and quiz leads directly into Marketo to trigger marketing automation activities.

Here's what you will need to get started :

- An Outgrow account (Freelancer plan does not include Integration)
- A Standard level or higher Marketo account

In order to use this direct integration, you will need to have an Essentials, Business or Enterprise plan subscription on Outgrow and a Marketo account.

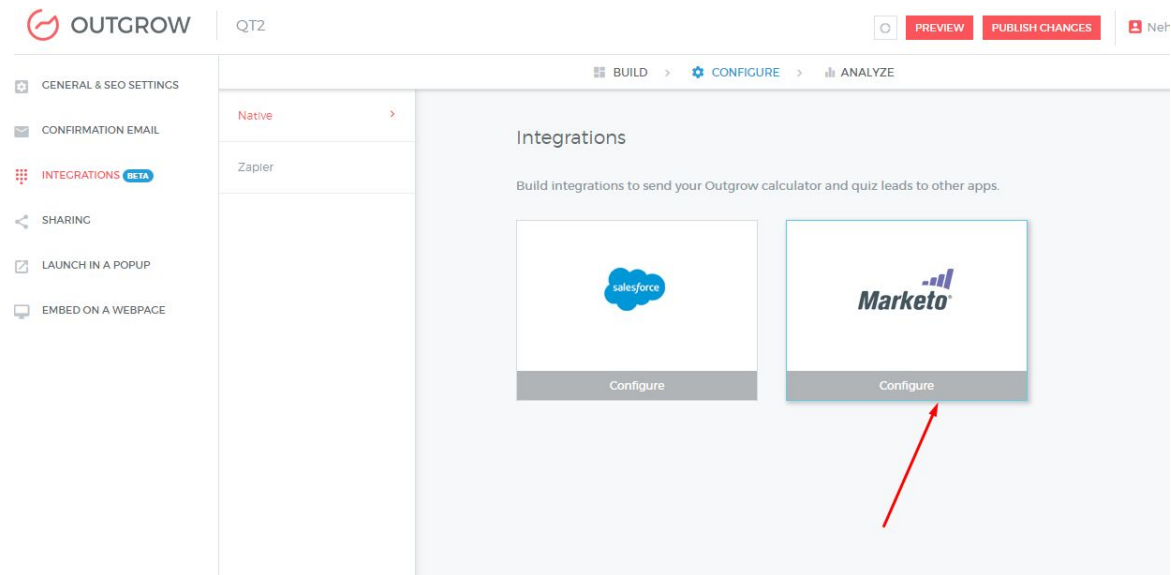
Steps:

Integrate your Outgrow calculator or quiz with Marketo seamlessly in two simple steps

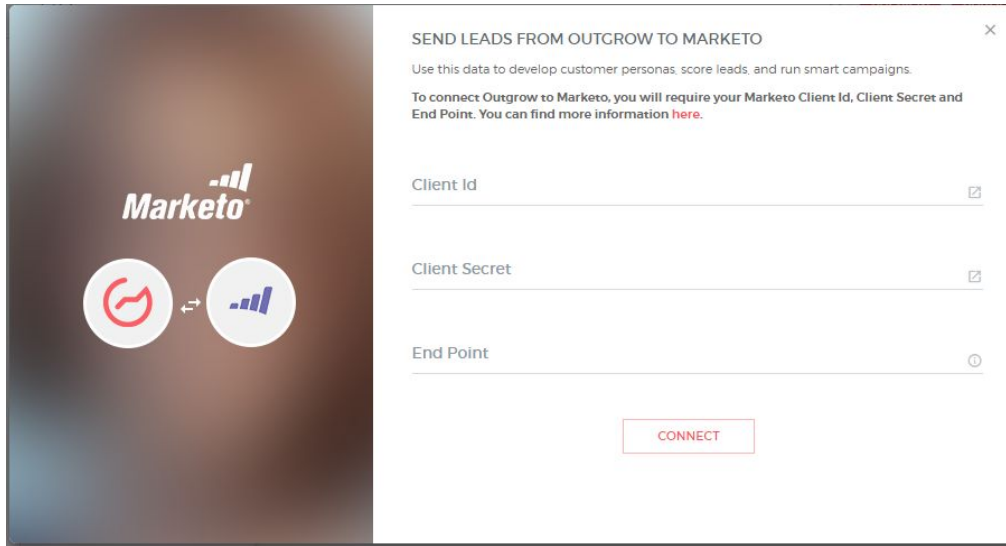
1. Configure
2. Map fields and Test connection

# Configure

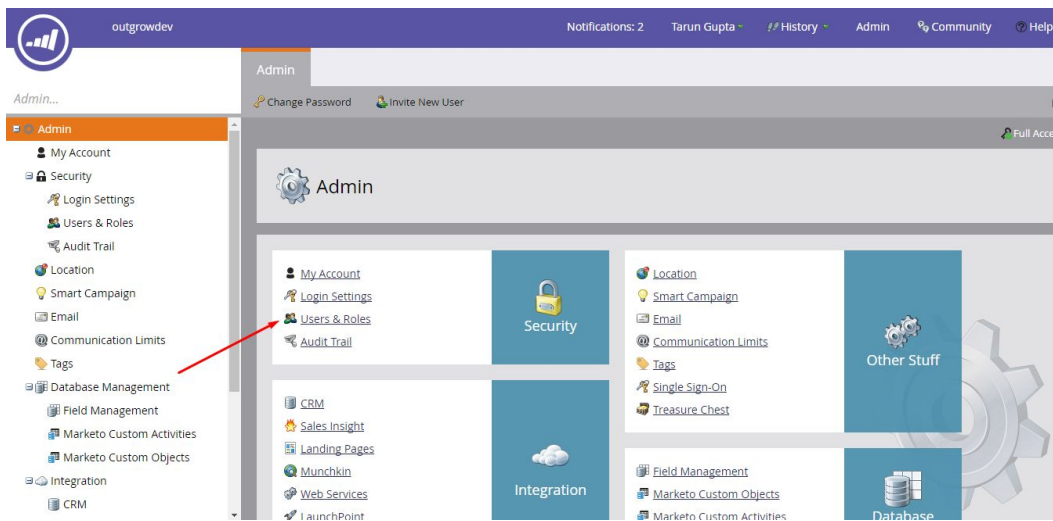
To access this integration, head into the Builder > Configure on your Outgrow calculator or quiz. Click the Configure button on Marketo Integration.



On clicking configure a pop up asking for the Client ID, Client Secret and Endpoint will appear. You will have to setup a custom service on Marketo to get the Client ID, Client Secret and Endpoint, which are required to authenticate with Marketo.



Head to Marketo and into the Admin settings of your Marketo account. In the Marketo Admin settings head to Users & Roles.



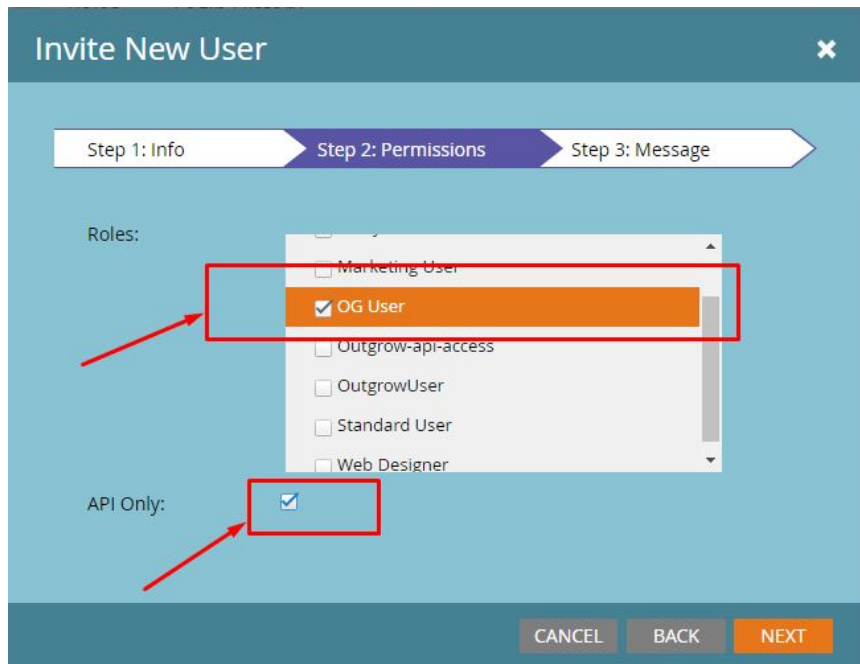
The first step of creating a Custom Service is to create a role that you can apply to the relevant API-Only user. This is done from the Admin > Users & Roles > Roles menu > + New role. When adding a new role, fill in a Role Name, Description and for Permission select Access API. Then create the new role.

The screenshot shows a 'Create New Role' dialog box with the following fields and options:

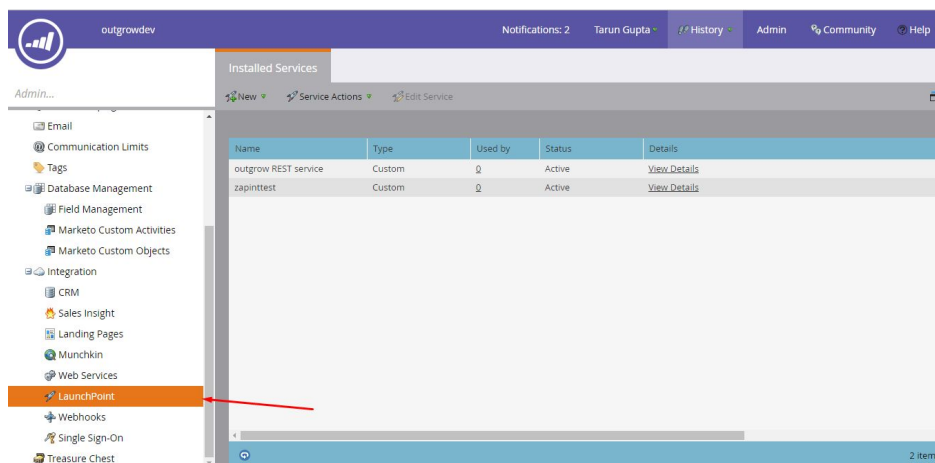
- Role Name:** OG User (marked with a red asterisk and arrow)
- Description:** OG User
- Permissions:**
  - Access Admin (0 of 29)
  - Access API (23 of 23) (highlighted with a red box)
  - Access Analytics (0 of 3)
  - Access Design Studio (0 of 34)
  - Access Lead Database (0 of 15)
  - Access Marketing Activities (0 of 11)
  - Workspace Administration (0 of 2)
  - Access Mobile Application

At the bottom, there are two buttons: 'CANCEL' and 'CREATE' (highlighted with a red arrow).

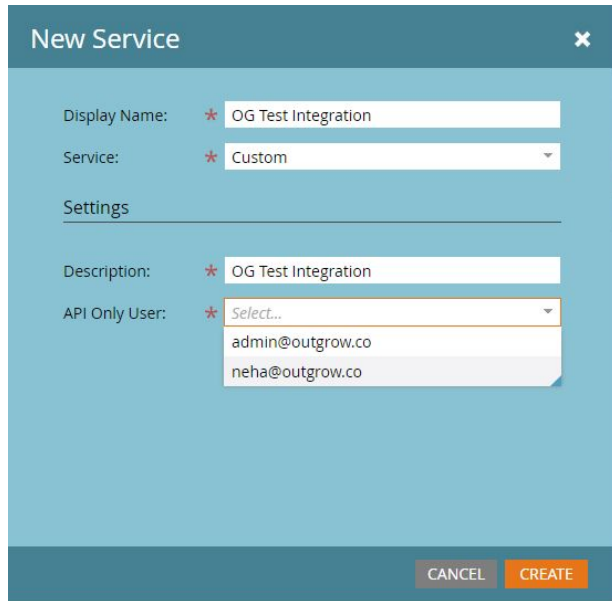
After creating a role, you will need to create an API-Only user. Once the new role is created, head into the Users tab and click on Invite a New User. Provide First Name, Last Name, Email Address and for Roles, check off the new role just added in the previous step. Lastly, check the checkbox for API Only.



After adding a new Role and a inviting a User head to the Admin panel and select Launchpoint from the menu items in left sidebar.



In Launchpoint, click on the New button to add a New Service. Fill in a Display Name, select a Custom service, fill in a Description and for API Only User, select the User just added in the previous step.



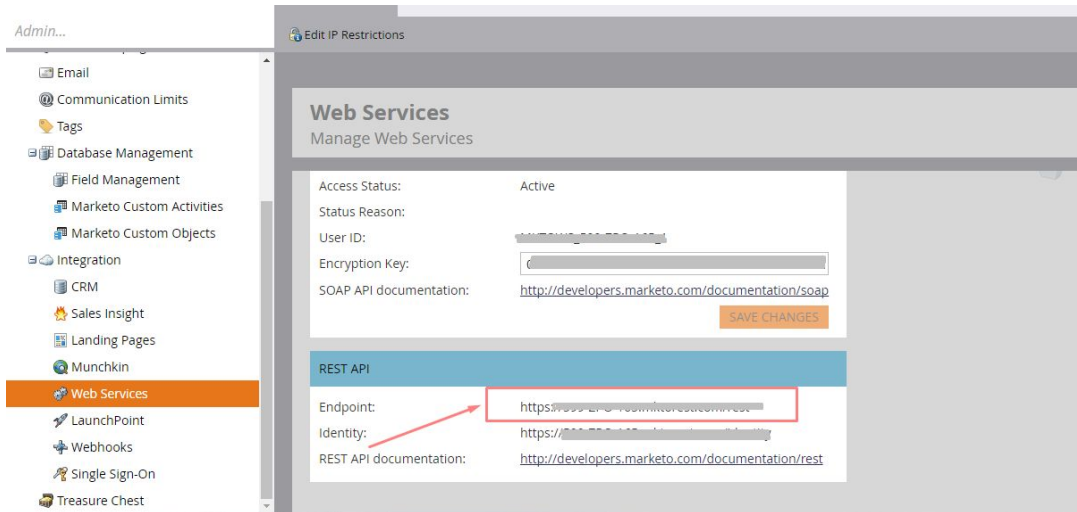
The screenshot shows a 'New Service' form with the following fields and values:

- Display Name: \* OG Test Integration
- Service: \* Custom
- Settings
- Description: \* OG Test Integration
- API Only User: \* Select... (dropdown menu showing admin@outgrow.co and neha@outgrow.co)

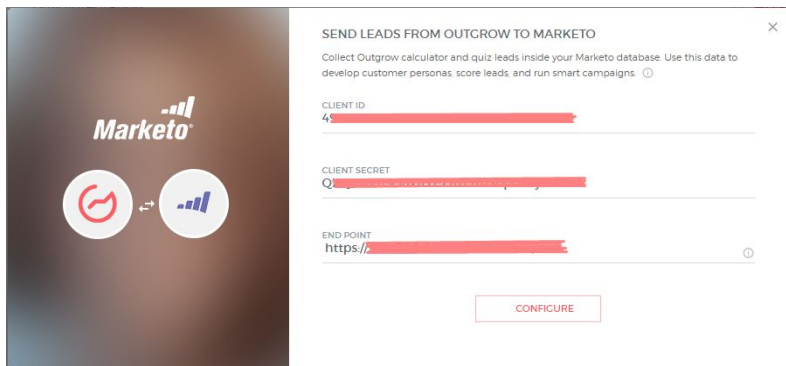
Buttons: CANCEL, CREATE

Once the New Service is successfully added, hit the View Details button and a pop up with the Client ID and Client Secret will appear. Copy the Client ID and Client Secret and paste it into Outgrow Marketo integration configure pop up.

You will also require the Endpoint data from your Marketo account. To get Endpoint of your Marketo head back to Admin and then to Web services.

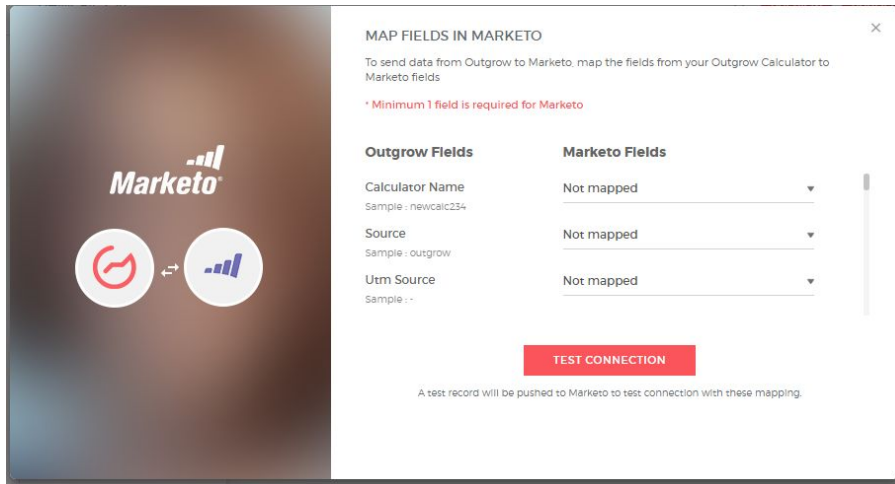


Find the Endpoint in the REST API box. Add the Client Id, Client Secret and Endpoint obtained from Marketo in the Configure popup and click Configure.



## Map fields

To set up integration map Marketo fields with the fields of your Outgrow calculator or quiz.



Once you are done mapping the fields, we will push a test lead to Marketo with some sample values. If connection and mapping is successful you will see the test lead in your Marketo Leads list.

## More actions

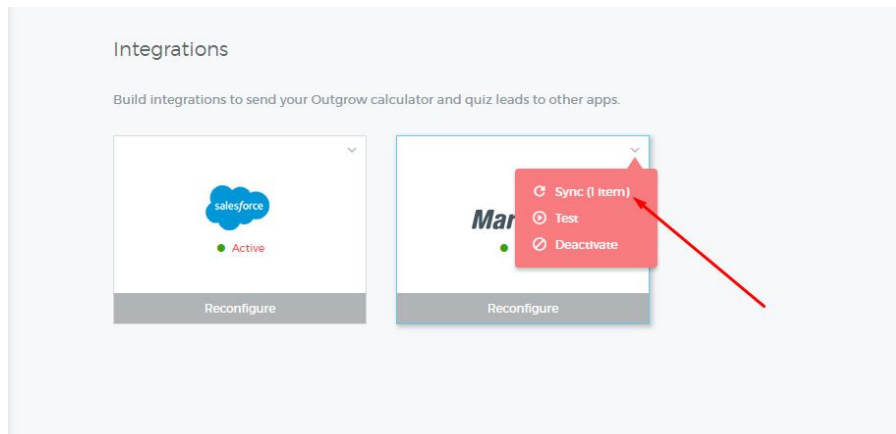
Click on the small dropdown on top of the Marketo to see actions which can be performed on Marketo integration after it has been set up.

**Re-configure-** In case your Marketo credentials have changed then you will have to Reconfigure your Marketo integration to perform properly.

**Sync-** If due to some error in connection your leads from a calculator or quiz have not been sent to Marketo then you can Sync the leads after re-configuring.



**Deactivate** - In case you don't want to send leads from a calculator or quiz to Marketo, you can simply deactivate it.



### **Important**

For every Outgrow calculator or quiz you create you will have to activate the integration from config section on the builder, in order to start sending its leads to Marketo.

