Marketo: Allowing API Access

Summary

To allow After Offers to send Lead information in real-time to your Marketo account, several actions need to be performed:

1) Create an API Access Role
2) Create an After Offers User, having the API Access Role
3) Attach the After Offers User to a Custom Service

Once configured, API calls can then be made by the After Offers system that will add the Lead, and perform other actions, such as adding the Contact to a Static List.

Note: The actions detailed in this document follow the steps given by Marketo at:

http://docs.marketo.com/display/public/DOCS/Create+an+API+Only+User+Role ,
http://docs.marketo.com/display/public/DOCS/Create+an+API+Only+User , and
http://docs.marketo.com/display/public/DOCS/Create+a+Custom+Service+for+Use+with+ReST+API

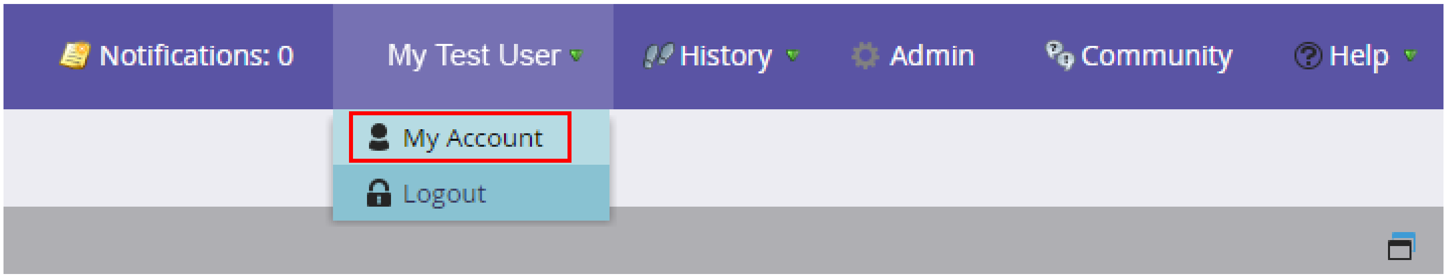
We have made them specific to the After Offers service.

Detail

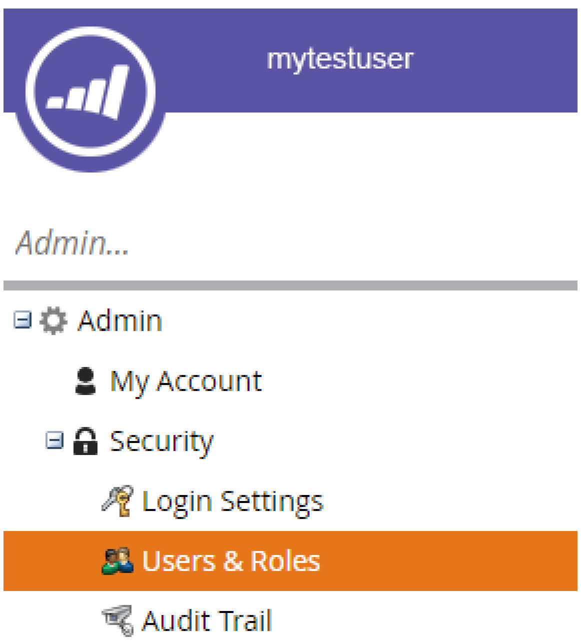
By default, Marketo does not have a Role available that allows API access. We will create that general Role here.

1) **Create an API Access Role**

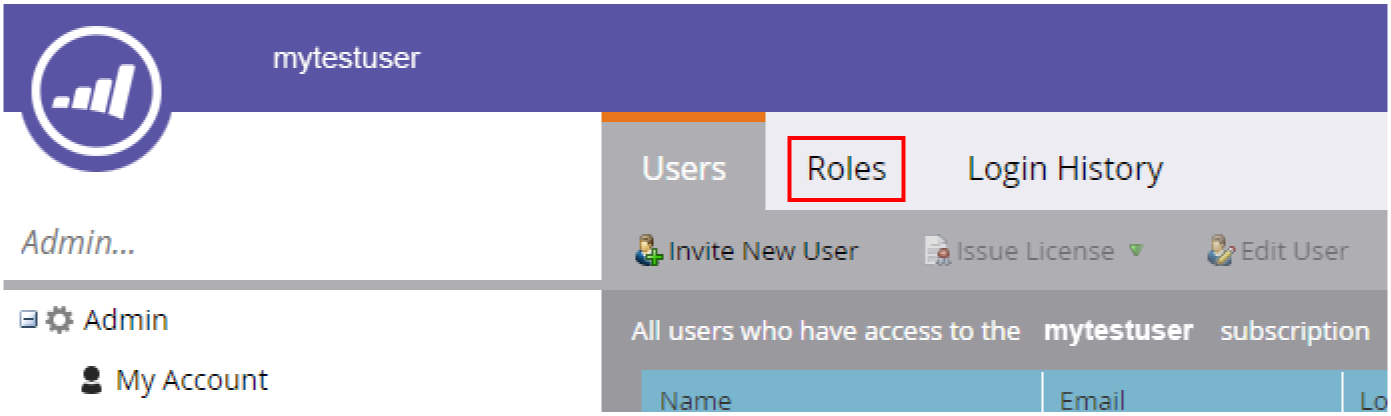
In the top-right menu bar, click your username (My Test User, here) and then click My Account



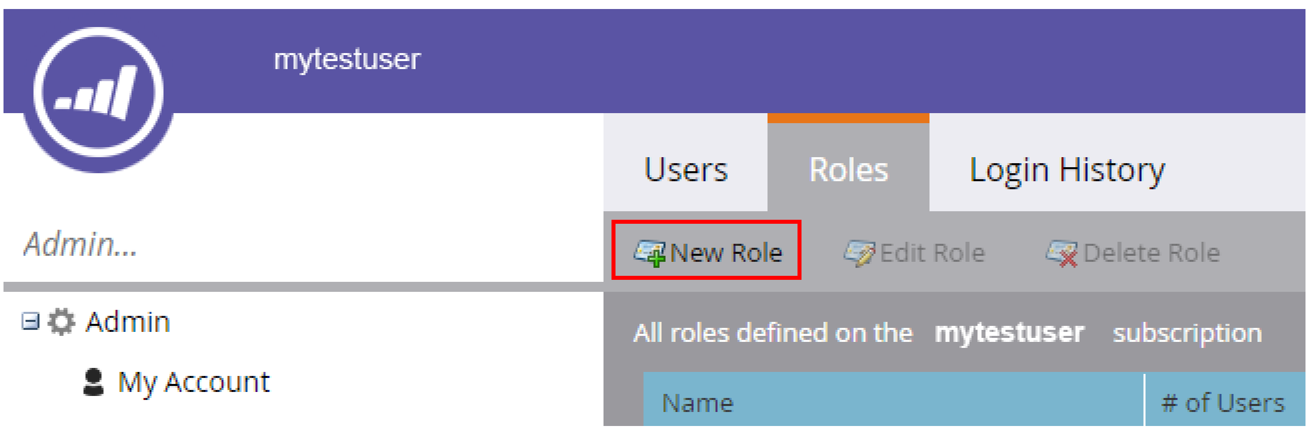
In the left menu bar, click Users & Roles



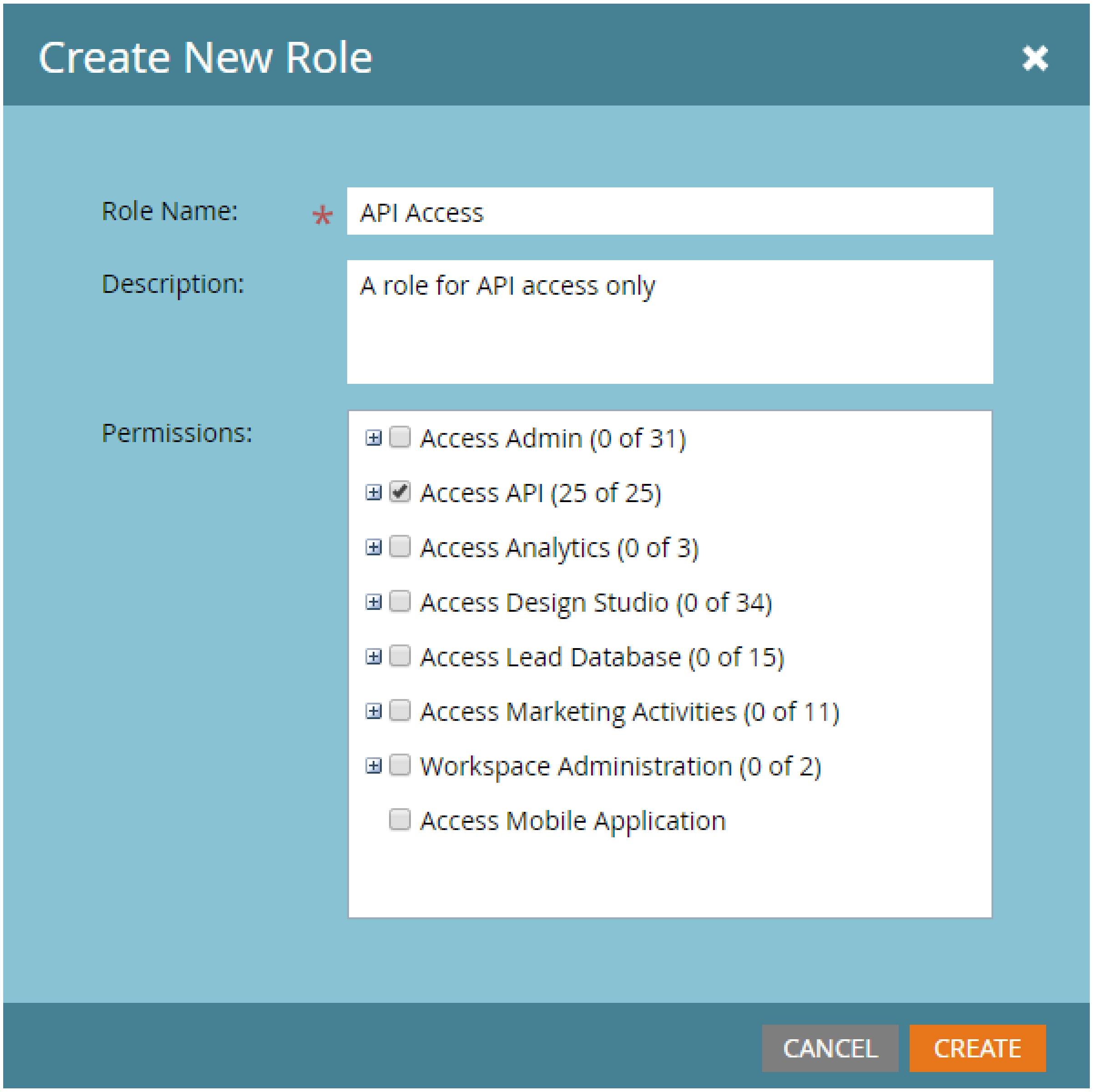
In the top menu bar, click Roles



Under Roles, click New Role



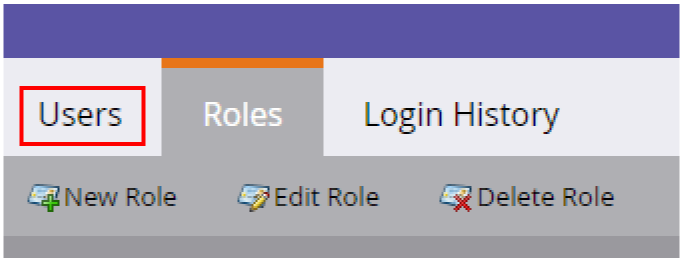
In the resulting popup, fill in as follows, being sure to check the box next to Access API (25 of 25)



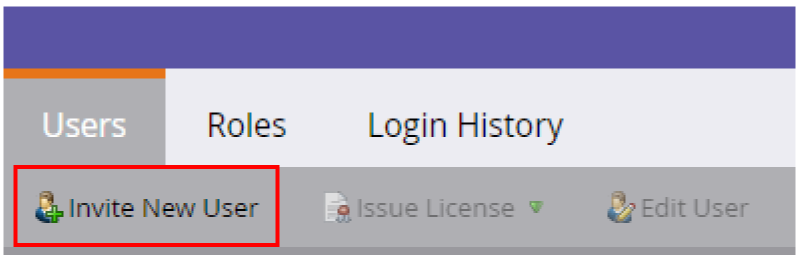
Click the orange CREATE button

2) Create an After Offers user, having the API Access Role

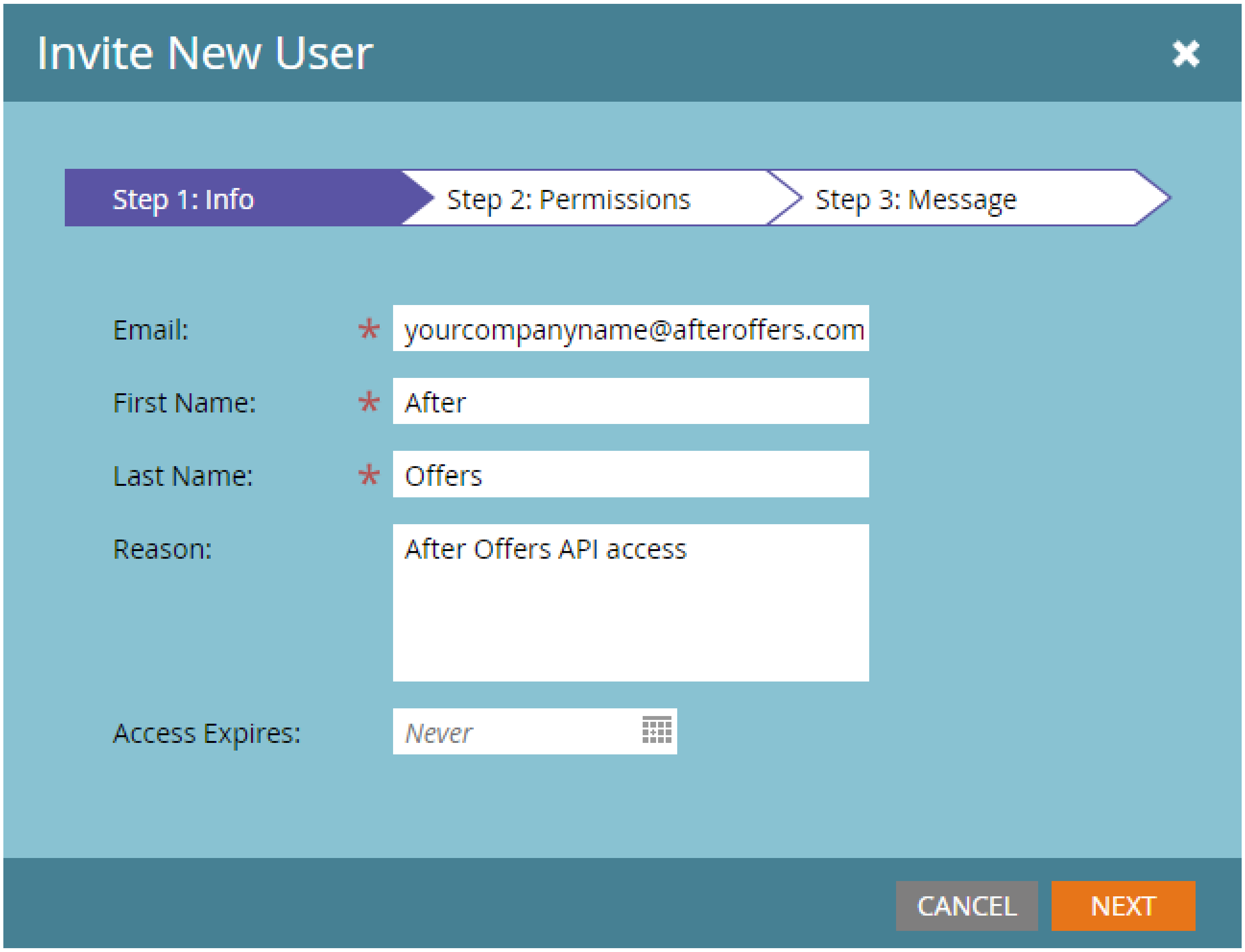
In the top menu bar, click Users



Under Users, click Invite New User

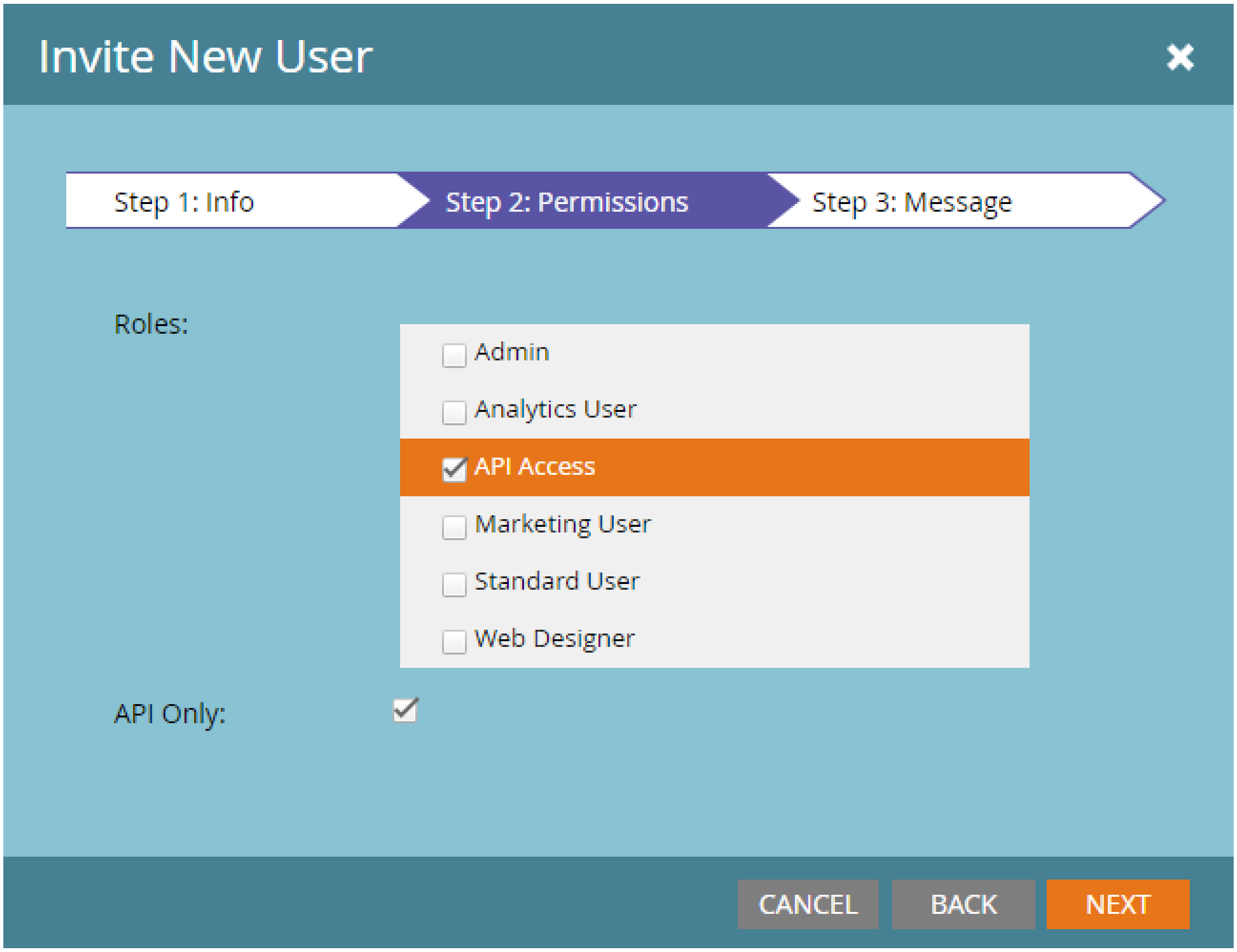


In the resulting popup, fill in as follows. Email should be Your Company Name at afteroffers.com, i.e. if you are Acme Company, enter acmecompany@afteroffers.com . No email will be sent to this address.



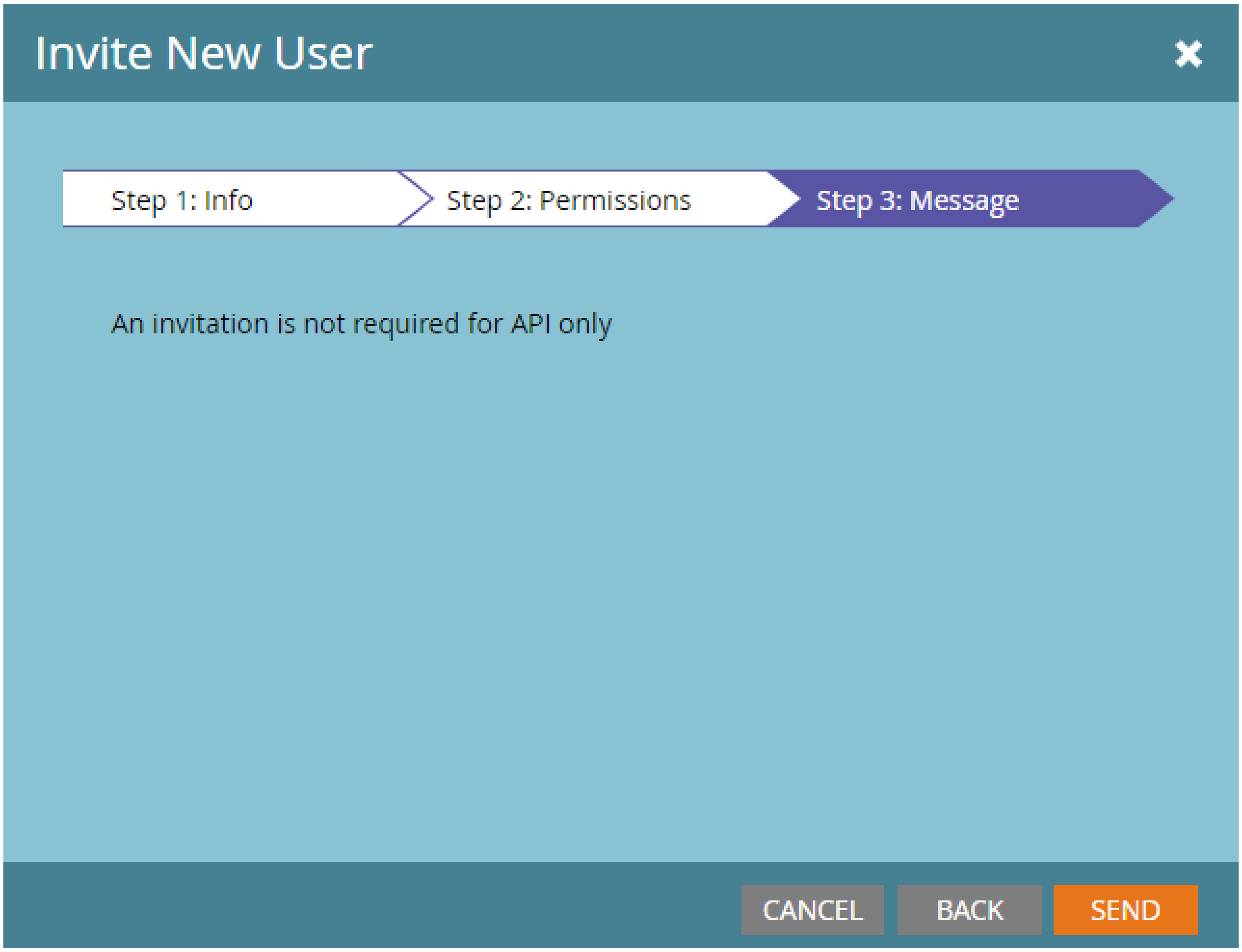
Click the orange NEXT button

On the next screen in the popup (Step 2: Permissions), check API Access for Roles, and check the API Only checkbox



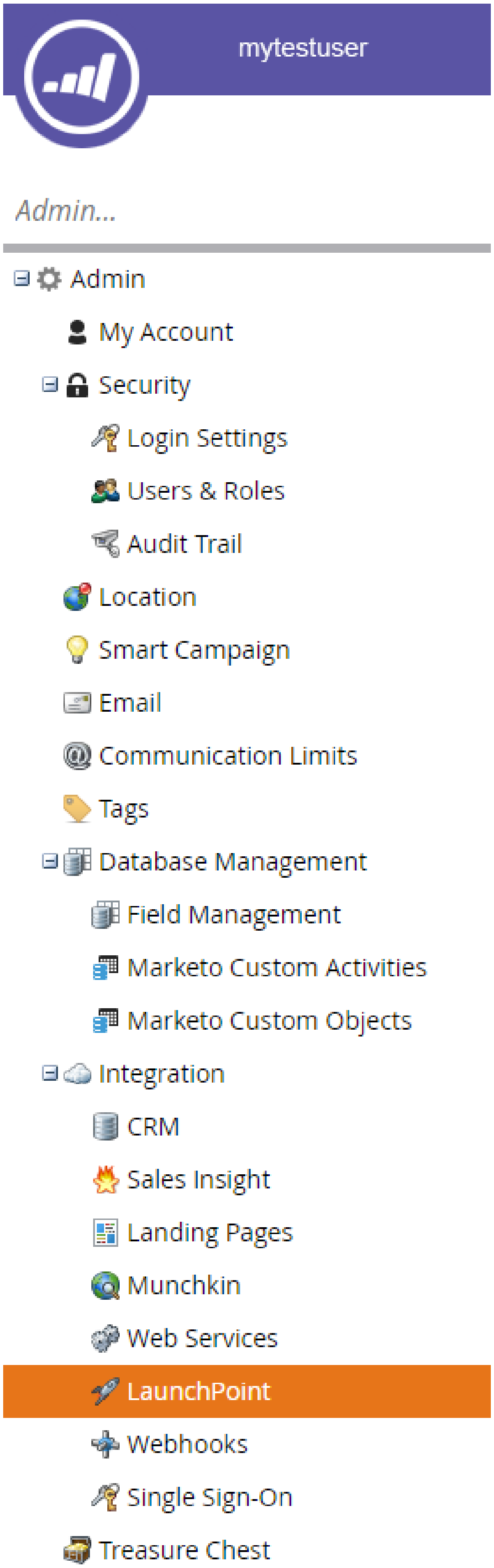
Click the orange NEXT button

In the final screen for the popup (Step 3: Message), simply click the orange SEND button

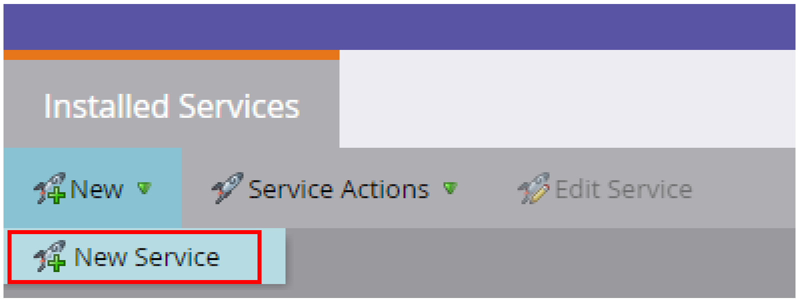


3) Attach the After Offers User to a Custom Service

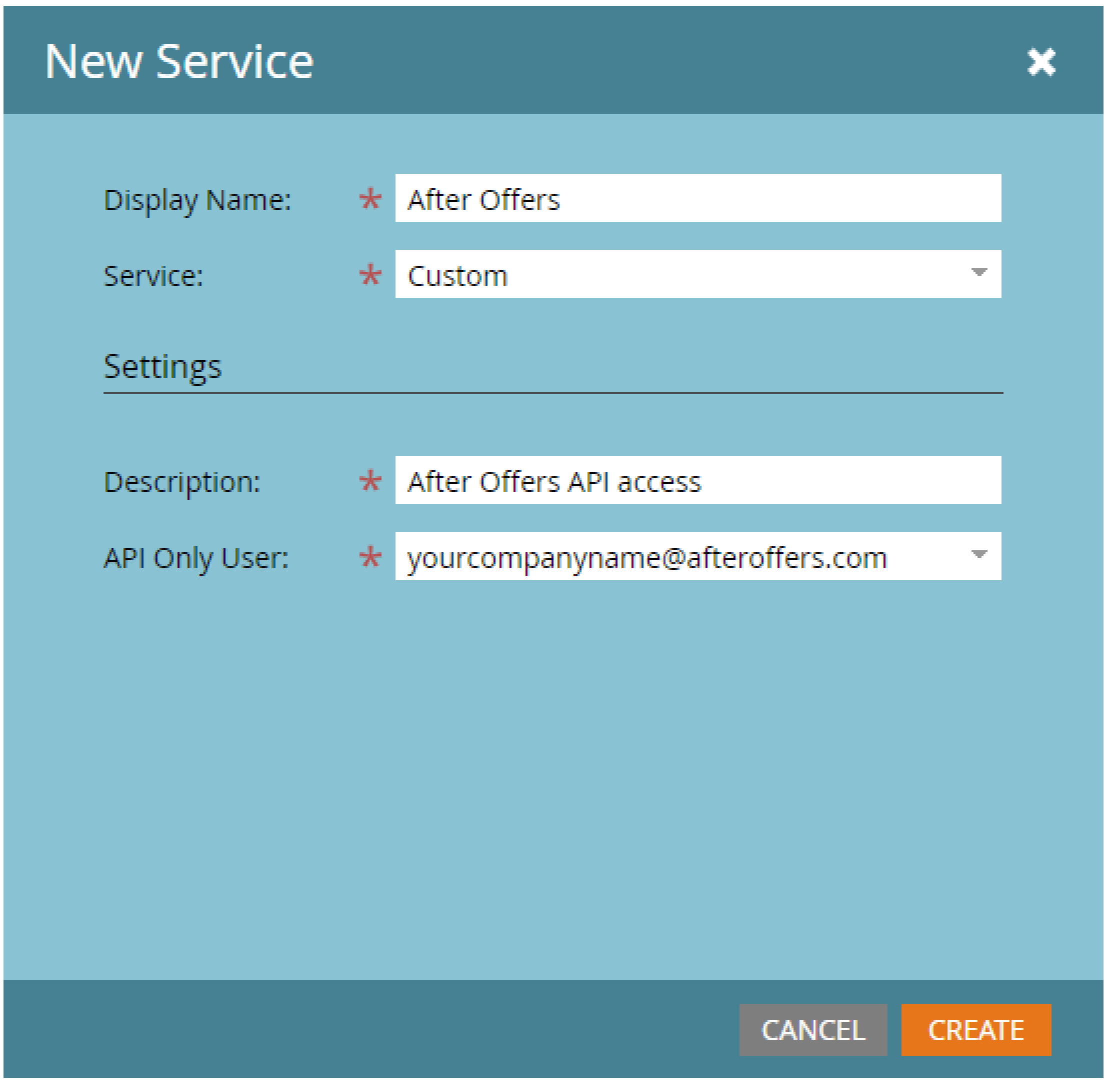
In the left menu bar, click LaunchPoint



On the top menu bar, under Installed Services, click New, then click New Service

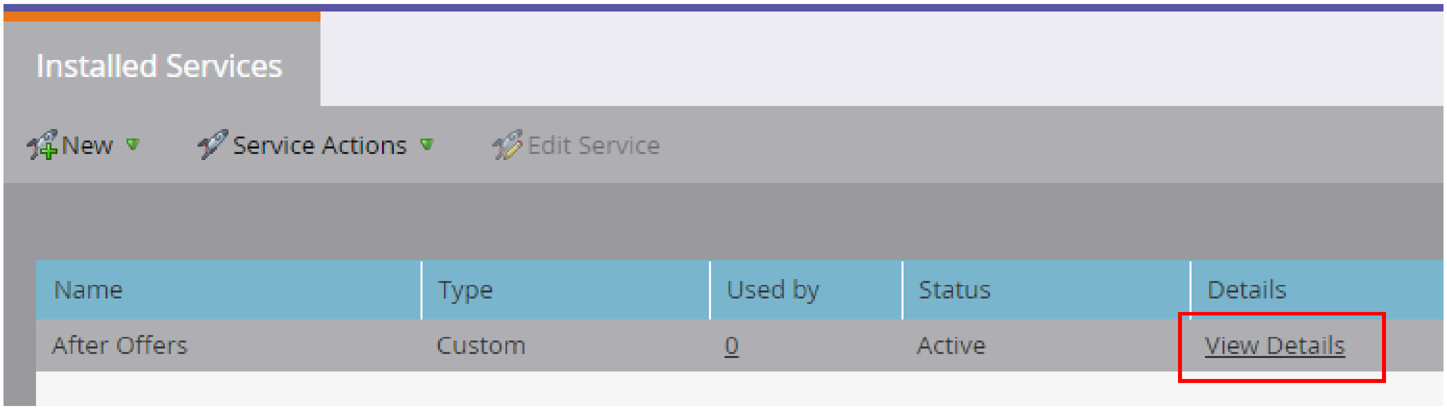


In the resulting popup, fill in as follows, being sure to choose Custom for Service, and choosing the User you created in step 2, above, for API Only User

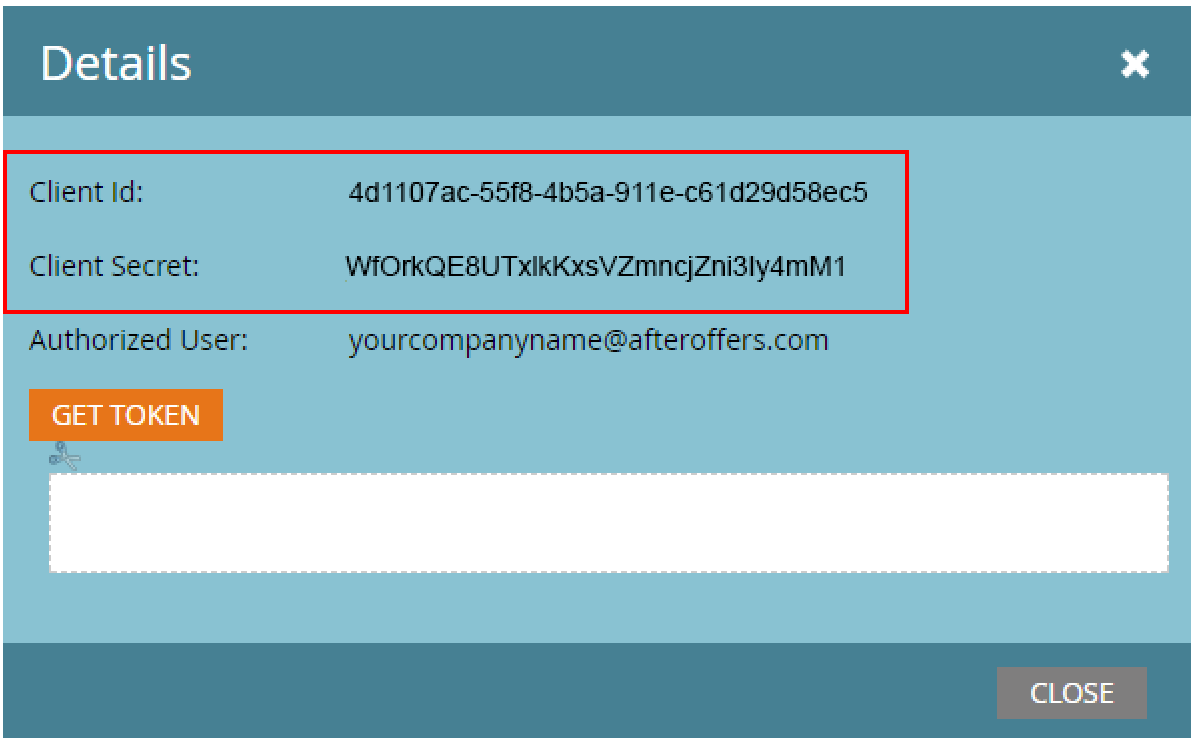


Click the orange CREATE button

On the resulting screen, click View Details for the After Offers user

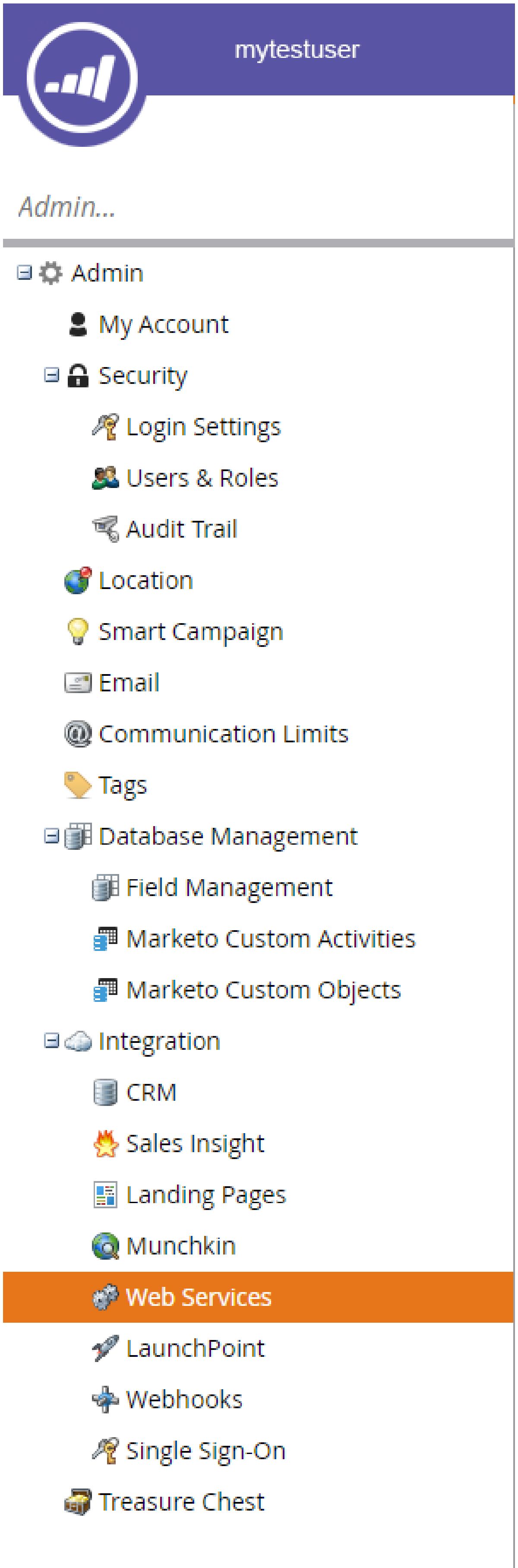


On the resulting popup, **make note of Client ID and Client Secret**. You will be sending them to your contact at After Offers.

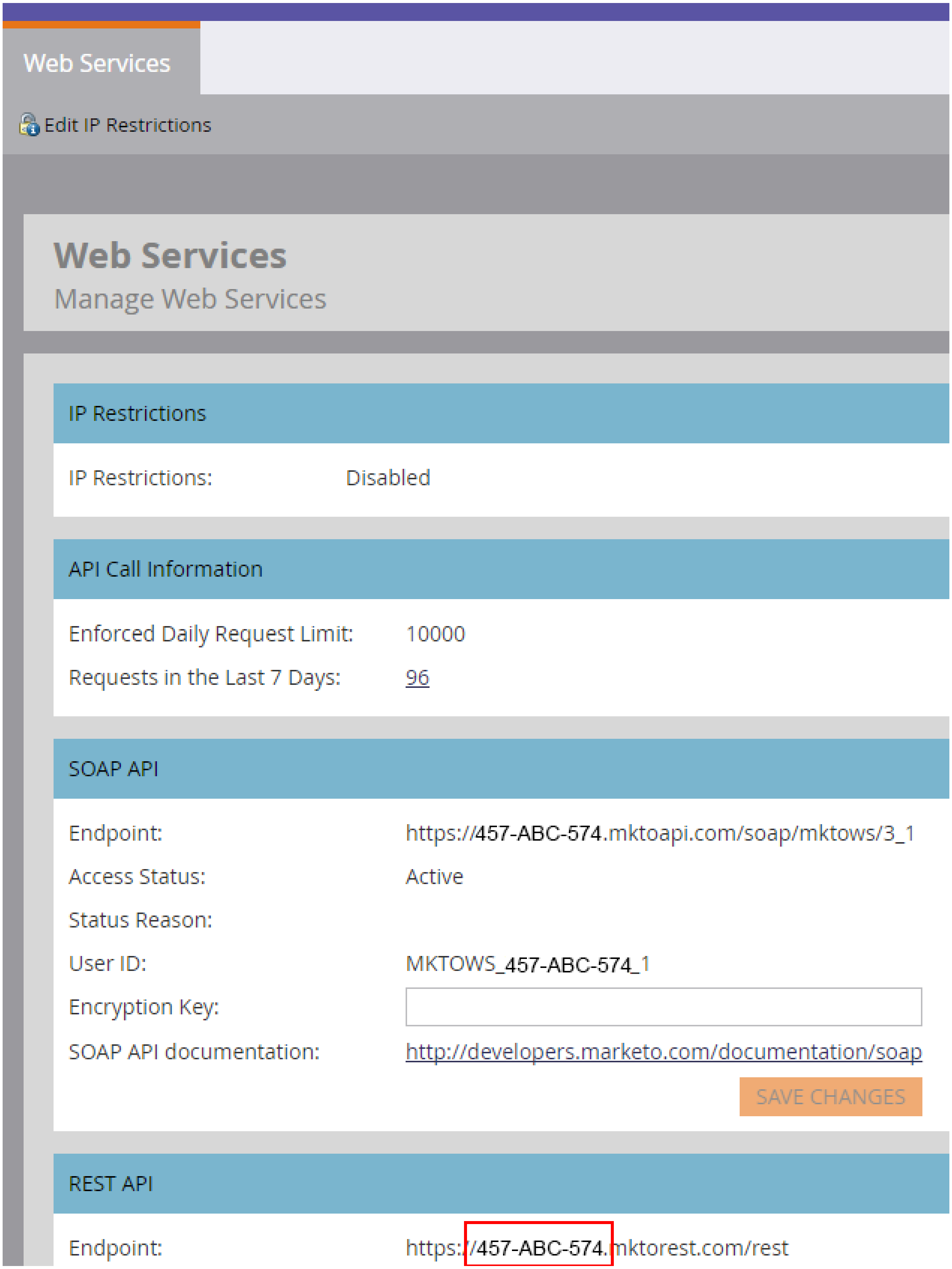


Click the gray CLOSE button

In the left menu bar, click Web Services



On the Web Services screen, **make note of the subdomain for the REST API**. Here, it is 457-ABC-574. You will also send this to your After Offers contact.



Finally, from the data noted in the previous steps, send the following to your After Offers contact:

Client ID
Client Secret
REST API subdomain