



2014

Birst Integration with Marketo

Extracting Data from Marketo

To extract data from Marketo, use the Application Connectors page under the Define Sources tab of the Admin module. You can upload data from standard Marketo objects with both standard columns and custom columns. After defining the objects to extract on the Application Connectors page, you can schedule Marketo extractions using the [Schedule Data Processing page](#) under the Process Data tab.

Note: Custom objects cannot be extracted from Marketo.

Note: Incremental extracts for the Lead and Activity objects can be performed using either the [Treat Rows as Transactions](#) feature or by using the Add Object feature as described in [Adding a Source Based on a Marketo Object](#) which allows you to provide selection criteria for an incremental extract using a specific date or a Birst [variable](#).

To extract data from Marketo:

1. Log in to Birst.
2. On the home page select the [space](#) you want to upload your Marketo data to, then click the Admin button.
3. In the Admin module, click the Define Sources tab, then click Application Connectors (or click the Use Extractors link from the Admin Navigation page).
4. Select Marketo from the Application Connector dropdown list.
5. Birst automatically sets the Connector API Version to the default version. Select a different version if desired.

Note: Birst determines which version is the default. If the selected API version is no longer available in Birst, the default API version will be automatically assigned. If the default API version is selected, when Birst changes to a new API version as the default, existing spaces will be automatically upgraded to the new default API version.

6. Enter your Marketo login information, and then click Login to connect Birst to your Marketo account. (Your login credentials will be automatically saved the first time you log in so you won't have to type this information again.)

Note: To find your User ID, Encryption Key, and SOAP Endpoint, log in to Marketo and select Admin, Integration, SOAP API. The information will be displayed on this page. For SOAP Endpoint, copy only the first part of the URL ending in .com. For example, if the SOAP Endpoint is https://074-UIN-407.mktoapi.com/soap/mktows/2_1, only copy and paste this part into Birst: <https://074-UIN-407.mktoapi.com>.


Note: You can provide a Source File Prefix if desired. This is used to avoid conflicts with other sources that have the same name. For example, if you extract an object called Lead from Salesforce and want to extract an object called Lead from Marketo as well, you could add the prefix **MKT** in this field. The source will be named **MKT_Lead** in Manage Sources to distinguish it from the **Lead** source from Salesforce.

7. After you log in to your account, a list of available Marketo data objects will be displayed in the table at the bottom of the page. If you have imported objects before, the objects you selected last time will be displayed.

Tip: Select Show All Objects to see all the objects available for extraction. Click Show Selected Objects to display only the objects that have been selected for extraction.

Note: Birst displays selected Lead activity types from the Marketo catalog. If you do not see an activity type you need, please contact Birst Support.

8. Click Show All Objects and select the Marketo data objects you like to upload to Birst and click Save.
9. To add a source based on a Marketo object, click Add Object. This can be used to select the specific columns you want to extract from an object and to provide selection criteria for performing an incremental extract. For performance reasons, it is recommended to use the Add Object feature to select only the columns that are required for reporting. See [Adding a Source Based on a Marketo Object](#) for information.
10. After selecting the objects to upload, select the Show Selected Objects view. In the Extract Group Name(s) field, you can specify the name of one or more extract groups (separated by commas) for each object so that specific objects can be extracted and processed separately from others. Click the Save button after adding extract group names. See [Creating Extract Groups](#) for more information.

Tip: To remove an object from the extraction list, click the  icon in the Remove column on the right.

11. Click Extract to upload the selected objects to Birst. If you have extract groups defined, you will be prompted to select the extract group(s) to use.

Note: Selecting All in the Extract Group dialog box will extract all selected objects, even those that do not belong to extract groups.

12. Depending on the size of the data objects, the extraction may take a few minutes. You can safely log out of Birst while the extraction takes place and log back in later.

Tip: To cancel the extraction, click the Cancel Extract link under the progress bar.

13. When the extraction is finished, in the Show Selected Objects view, the objects you extracted will be displayed in the Data Sources table with an updated date and time under Last Updated.

Tip: Click the Last Extract Log link to view the logs from the data extraction and check for errors.

Use the Manage Sources page to view the columns and raw data from the extracted objects. Note that some Marketo Activity columns have attributes. These attributes are added as columns in Birst. For this reason, extra columns will be displayed in the Columns tab on the Manage Sources page for some Activity sources which are not displayed in the Columns field of the New Object dialog box when the columns are retrieved by clicking Get Columns.

When you are ready to process the extracted data, go to the [Process New Data page](#) under the Process Data tab. To schedule extractions from Marketo, use the [Schedule Data Processing page](#) under the Process Data tab.