



# Marketo Connector Installation Guide

## Overview

Marketo provides marketing automation and sales effectiveness solutions that help B2B marketing and sales teams at global enterprise and mid-sized companies unlock growth across the revenue cycle. Beginning with version 7.2.0, Sugar can be integrated with Marketo which allows key data (e.g. name, phone, address, etc.) for Accounts, Contacts, Leads, and Opportunities to be synced seamlessly between Sugar and Marketo. For more information on utilizing the connector to sync data, please refer to the Marketo Connector User Guide (./Marketo\_User\_Guide). Before you can utilize the connector in Sugar, you must configure your Marketo account as well as upload the Marketo connector package to Sugar and enable the connector accordingly.

## Configuring Marketo

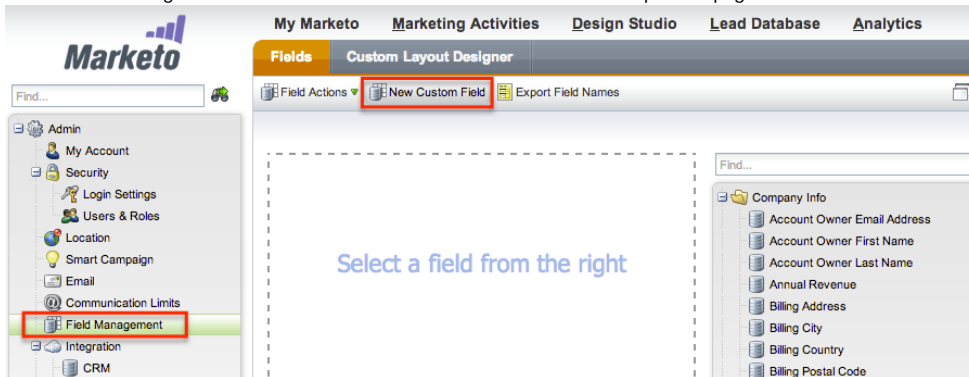
Once you have signed up for service with Marketo, you will receive your login information and set up instructions via email. You will need to configure your Marketo account by adding custom fields and webhooks before enabling the Marketo connector in Sugar. If you already have a Marketo account, then simply log into your account and apply the configurations below.

## Adding Custom Fields

The Marketo connector requires specific custom fields to be added to your Marketo account in order to sync data properly to Sugar.

To add custom fields in Marketo, please follow the steps below:

1. Navigate to the Admin page in Marketo.
2. Select "Field Management" then click the New Custom Field button at the top of the page.



3. Select the "Type" then enter the "Name" and "API Name" values shown below in the New Custom Field popup box. Click "Create" to add each field.

Type	Name	API Name
String	SugarCRM Type	sugarcrm_type
String	SugarCRM ID	sugarcrm_id
String	SugarCRM Owner First Name	sugarcrm_owner_first_name
String	SugarCRM Owner Last Name	sugarcrm_owner_last_name
String	SugarCRM Owner Title	sugarcrm_owner_title
String	SugarCRM Owner Phone	sugarcrm_owner_phone
Email	SugarCRM Owner Email	sugarcrm_owner_email

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#### Documentation

- Introduction (/01\_Get\_Started)
- Sugar Documentation (/02\_Documentation/01\_Sugar\_Edition)
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#### Training & Help

- Community Forums (<https://community.sugarcrm.com/sugar>)
- Sugar University (/03\_Training)
- Sugar Certification Program (/03\_Training/Certification)
- Weekly Webinars (/03\_Training/Weekly\_Webinars)
- Live Classes ([http://www.sugarcrm.com/university\\_class](http://www.sugarcrm.com/university_class))
- Sugar Knowledge Base (/04\_Find\_Answers/02KB)
- Developer Knowledge Base (/04\_Find\_Answers/03\_Developers)
- Developer Blog (<http://developer.sugarcrm.com/>)

#### Customer Tools

- My Account

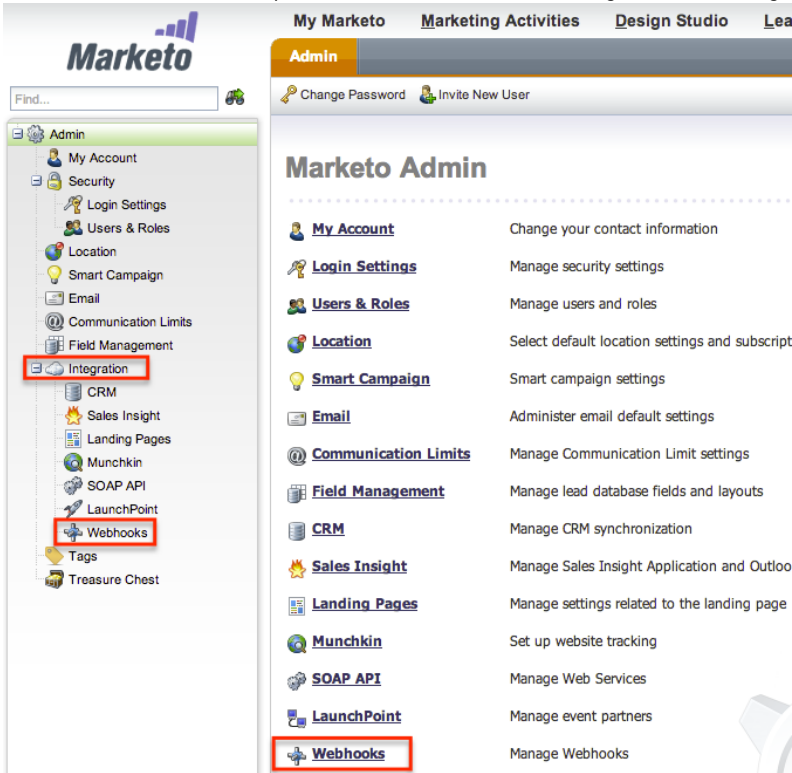
Checkbox | SugarCRM Deleted | sugarcrm\_deleted

4. The newly added custom fields will appear in the field list to the right of the page.

## Adding Webhooks

Once the custom fields have been added, you will create a webhook which allows Marketo to push data to SugarCRM. Please note that you will need to have your Sugar instance URL when adding the webhook.

1. Navigate to the Admin page in Marketo.
2. Select "Webhooks" on the main panel or click the Plus icon next to "Integration" on the navigation tree then choose "Webhooks".

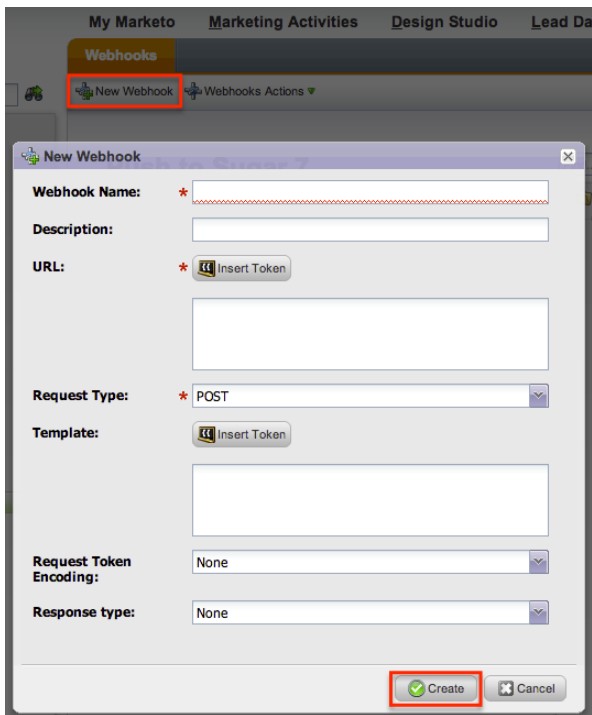


3. Click the New Webhook button at the top of the page and enter the following values in the corresponding fields.

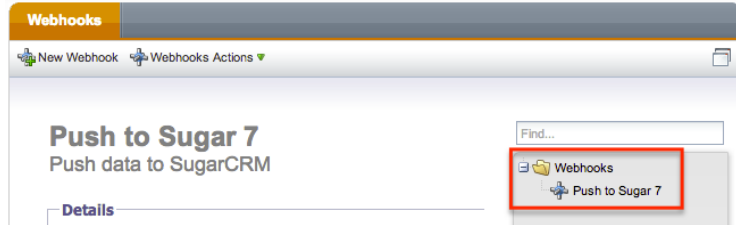
Field	Description
Webhook Name	Enter in a name for the webhook (e.g. Push to SugarCRM)
Description	Enter in a description for the webhook (e.g. Push data to SugarCRM)
URL	Enter in your Sugar instance URL (https://abccompany.sugarondemand.com)
Request Type	Select "POST"
Template	Enter "entryPoint=marketo&id={{lead.ID}}" (minus the quotes)
Request Token Encoding	Select "JSON"
Response Type	Select "JSON"

4. Click "Create" to save the webhook.

(//www.sugarcrm.com/sugarshop/accc  
Purchased Downloads  
(https://store.sugarcrm.com/download/  
Open Cases  
(https://web.sugarcrm.com/support/ca  
Bug Tracker  
(https://web.sugarcrm.com/support/iss  
On-Demand Status  
(//status.sugarcrm.com/)



5. The newly added webhook will appear under the Webhooks folder to the right of the page.



## Installing the Marketo Connector Package

In order to enable the Marketo connector in Sugar, you must first download the Marketo Connector package to your local machine which will be uploaded to Sugar. Please note that you must have administrative access in Sugar to upload and install packages via Module Loader.

### Downloading the Package

The Marketo Connector for SugarCRM package is available for download on SugarExchange ([http://www.sugarexchange.com/product\\_details.php?product=944](http://www.sugarexchange.com/product_details.php?product=944)).

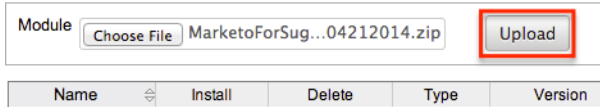
### Uploading the Package to Sugar

Once you have downloaded the package (MarketoForSugarCRMv3.0.0\_04212014.zip), you can upload it to your Sugar instance via Module Loader.

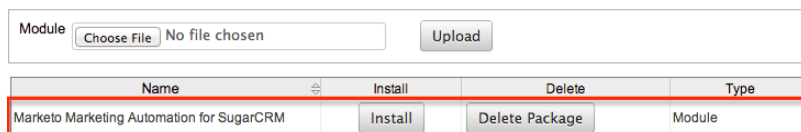
1. Navigate to Admin > Module Loader.
2. Click the "Choose File" button in the Module Upload panel to open a file selection window from your browser.



3. Select the package from your local machine.
4. Click the Upload button to load the package to Sugar.



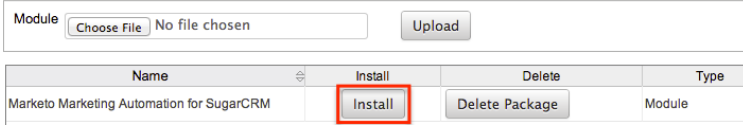
Once the upload is completed successfully, the package will appear in the Uploaded Packages panel.



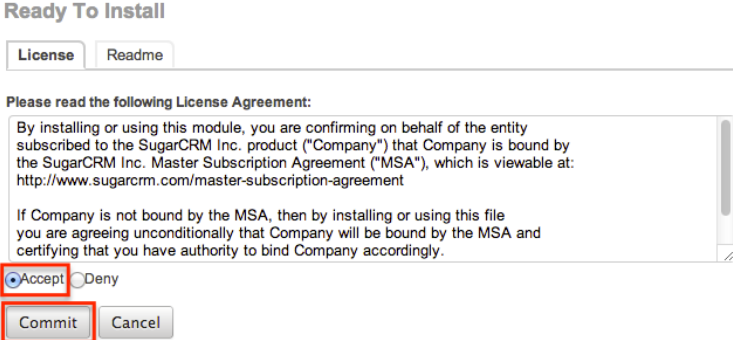
# Installing the Package to Sugar

After the package is uploaded via Module Loader, it must be installed in order for the package's contents to take effect on your instance. Please keep in mind that the package must be loaded first before installing in Sugar.

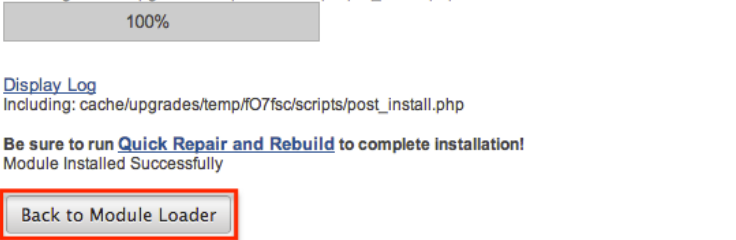
1. Click the Install button to the right of the uploaded package name.



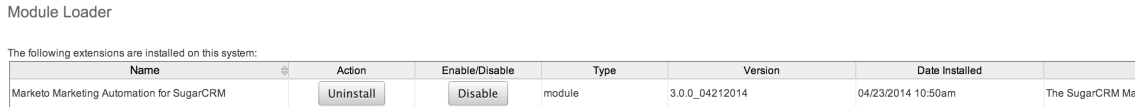
2. Review the License Agreement and select "Accept". Click "Commit" to run the installation.



3. A progress bar will appear on the following page and display a message once the module is installed successfully.
  - o If there are any errors detected, it will be displayed on the page along with details of what caused the issue(s). You can also click "Display Log" to view details of what occurred during the installation process.
4. Click the Back to Module Loader button once the installation is complete to return to the previous page.



The installed package will appear on the Module Loader page and the Marketo connector can now be enabled in your instance.



# Enabling the Marketo Connector

Once the package is installed successfully in Sugar, the Marketo connector can be enabled accordingly via Admin > Connectors. Please note that you must have administrative access to enable connectors in Sugar.

The following steps cover how to configure and enable the Marketo connector in Sugar.

1. Navigate to Admin > Connectors > Set Connector Properties.



2. Select the Marketo tab and enter the following information:
 

**Note:** You must navigate to the SOAP API section of the Admin page in Marketo in order to get the SOAP Endpoint, SOAP API User ID, and SOAP API Encryption Key information.

Property	Description
Enable Marketo for SugarCRM	Select "Yes".
SOAP Endpoint	Copy and paste the SOAP API "Endpoint" from Marketo.
SOAP API User ID	Copy and paste the SOAP API "User ID" from Marketo.
SOAP API Encryption Key	Copy and paste the SOAP API "Encryption Key" from Marketo.

When a new SugarCRM Lead is created, who should be the default Assigned To?	Select the default user assigned to the new lead created in Sugar.
Only download Marketo leads with a score greater than	Enter in a score (e.g. 50) identifying what threshold leads must meet in order to be pushed to Sugar. Default score is "0" which means all leads in Marketo will be downloaded.
How many lead records should we download each time synchronize occurs with Marketo?	Select the number of lead records you wish to download each time Sugar is synchronized with Marketo. Default is "As many records as possible".
How many records should we download from Maketo per batch	Select the number of records to download from Marketo per batch. Default is "100".
Which Marketo Activity Logs should we download to SugarCRM?	Select the Marketo Activity Log Type(s) (e.g. Interesting Moment, Fill Out Form, etc.) you wish to download to SugarCRM.

[Connector Settings](#) » Set Connector Properties

3. Click the Test Connector button on the bottom left of the screen to ensure that the connector is enabled successfully.

4. Click "Save" to preserve the connector settings.

If the test fails for the connector it could be due to the following reasons:

- The Enable Marketo for SugarCRM option in Admin > Connectors > Set Connector Properties is not set to "Yes".
- SOAP and hash\_hmac is not installed in your environment and must be added to your PHP configuration.
- The required custom API fields below are not available in Marketo. For more information on adding custom fields in Marketo, please refer to the Adding Custom Fields section above.
  - sugarcrm\_type
  - sugarcrm\_id
  - sugarcrm\_owner\_first\_name
  - sugarcrm\_owner\_last\_name
  - sugarcrm\_owner\_title
  - sugarcrm\_owner\_phone
  - sugarcrm\_owner\_email
  - sugarcrm\_deleted

## Marketo Connector Field Mappings

Once the Marketo connector is enabled successfully, you can navigate to the Map Connector Fields page in Admin > Connectors to view the list of fields (Connector Fields, Module Fields) that are mapped by default between Marketo and Sugar. The specific module fields selected on the page are the designated Sugar fields that Marketo fields will be mapped to when data is synced in Sugar and vice versa. The enabled modules (Leads, Contacts, Accounts, and Users) will appear under the Marketo tab of the Map Connector Fields page along with all the pre-mapped fields per module.

Save Cancel

Twitter@ Marketo@

**Leads**

Connector Fields	Module Fields
Salutation	Salutation
First Name	First Name
Last Name	Last Name
Job Title	Title
Email Address	Email Address (email1)
Company Name	Account Name
Address	Primary Address Street
City	Primary Address City
State	Primary Address State
Postal Code	Primary Address Postal Code

## Marketo Schedulers

When the Marketo connector is enabled properly in Sugar, two Marketo schedulers are automatically created in Admin > Scheduler. The Check Marketo for changes to Leads scheduler checks Marketo for any changes (e.g. name, phone, etc.) in leads since the last checkpoint and syncs the data to Sugar. The Check for Marketo for updates to Activity Logs scheduler checks for any changes to the lead's activity log since the last checkpoint and syncs the information to Sugar. Only the activity logs you selected when configuring the Marketo connector will be checked for updates for sync. Please note that administrators can view the last checkpoint stored in Sugar for lead synchronization and activity log synchronization via Admin > Synchronization Table Information.

By default, the schedulers are set to "Inactive" and you will need to set it to "Active" once you are ready to utilize the Marketo connector and begin downloading leads. Please be sure to add the custom Marketo fields you wish to view in Sugar before enabling the schedulers so that the data populates accordingly in the record when the leads are downloaded. For more information on creating custom Marketo fields, please refer to the Adding Marketo Fields in Sugar section. Also, set the scheduler's interval to "As often as possible" so that the scheduler checks for updates on a frequent basis and keeps the data up-to-date.

### Schedulers

Scheduler	Interval	Range	Status
Check Marketo for changes to Leads	Every 5 minutes	04/22/2014 04:22pm - 01/01/2099 03:59pm	Inactive
Check for Marketo for updates to Activity Logs	Every 30 minutes	04/22/2014 04:22pm - 01/01/2099 03:59pm	Inactive
Process Workflow Tasks	As often as possible.	01/01/2005 04:45am - 12/31/2020 03:59pm	Active

## Adding Marketo Fields in Sugar

A set of default Marketo fields should be added to Sugar via Admin > Studio for the Opportunities, Contacts, and Leads module. Creating these fields and adding it to the module's Record View layout will allow the specific data from Marketo to be synced and viewable in the Sugar record. Simply navigate to Admin > Studio > "Module" > Fields to add each custom field for the modules.

In addition, the stock Lead Score and Marketo Lead ID fields should be added to the Leads and Contacts record view as these fields will automatically populate with the unique ID and designated lead score associated to the downloaded lead. Also, in order to mark records for sync to Marketo, the Sync to Marketo field should be added to the Leads, Contacts, and Opportunities module. The Sync to Marketo field must be checked in order for the record to be included for sync to Marketo. For more information on syncing Sugar records to Marketo, please refer to the Marketo Connector User Guide (./Marketo\_User\_Guide).

### Contacts Module

Field Name	Display Label	Type
mrkto2_anonymousip	Anonymous IP	TextField
mrkto2_do_not_call_reason	Do Not Call Reason	TextField
mrkto2_inferred_company	Inferred Company	TextField
mrkto2_inferred_country	Inferred Country	TextField
mrkto2_middle_name	Middle Name	TextField
mrkto2_rating	Lead Rating	TextField
mrkto2_role	Role	TextField

mrkto2_site	Site	TextField
mrkto2_unsubscribed	Unsubscribed	Checkbox
mrkto2_unsubscribed_reason	Unsubscribed Reason	TextArea

#### Leads Module

Field Name	Display Label	Type	Note
mrkto2_annualrevenue	Annual Revenue	Currency	
mrkto2_anonymousip	Anonymous IP	TextField	
mrkto2_do_not_call_reason	Do Not Call Reason	TextField	
mrkto2_industry	Industry	DropDown	Select "industry_dom" from Drop Down List field when creating the field.
mrkto2_inferred_company	Inferred Company	TextField	
mrkto2_inferred_country	Inferred Country	TextField	
mrkto2_main_phone	Main Phone	Phone	
mrkto2_middle_name	Middle Name	TextField	
mrkto2_number_of_employees	Num Employees	Integer	
mrkto2_rating	Lead Rating	TextField	
mrkto2_role	Role	TextField	
mrkto2_sic_code	SIC Code	TextField	
mrkto2_site	Site	TextField	
mrkto2_unsubscribed	Unsubscribed	Checkbox	
mrkto2_unsubscribed_reason	Unsubscribed Reason	TextArea	

#### Opportunities Module

Field Name	Display Label	Type	Note
mrkto2_expected_revenue	Expected Revenue	Currency	
mrkto2_fiscal_quarter	Fiscal Quarter	DropDown	Select "mkto_fiscal_quarter_list" from Drop Down List field when creating the field.
mrkto2_fiscal_year	Fiscal Year	Integer	
mrkto2_forecastcategoryname	Forecast Category	DropDown	Select "mkto_forecastcategoryname_list" from DropDown List field when creating the field.
mrkto2_is_closed	Is Closed	Checkbox	
mrkto2_is_won	Is Won	Checkbox	