

Marketo®-Radius Integration Guide

The Marketo–Radius integration lets you quickly see a complete picture of your prospects across Salesforce, Marketo, and Radius. This integration allows Radius to leverage both Salesforce and Marketo data to find your best segments, improve match rates, and minimize duplicate records. And soon you'll be able to launch marketing efforts directly to Marketo.

Before You Start

Make sure you have each of these prerequisites in place before you start the Marketo–Radius integration. Consult your Marketo documentation or support resources as needed.

- Salesforce Group edition or higher
- Initial Salesforce OAuth and Radius sync complete
- Marketo Administrator permissions
- Radius Administrator permissions

First, Set Up API Access in Marketo

The first step in the Marketo–Radius integration is setting up API access in Marketo. You'll create a role and account for the integration, and then create a user and assign the role.

ⓘ *If you need to, consult the Marketo documentation for general information on setting up roles and accounts. Search: "Create an API Only User Role" and "Create an API Only User".*

1. Log in to Marketo as an administrator.
2. Create a role and account specifically for the Radius integration. Name the new role something like "Radius API Role".
3. Assign the **Access API** permission to the API access role you created.
4. Create a new user with a logical name, such as "Radius API User," and assign that user the Radius API role. Select the **API Only** checkbox.

Get REST API Credentials from Marketo

To get the Marketo REST API credentials Radius needs, you'll create a new custom service in Marketo and then assign the API user you just created.

ⓘ *If you need to, consult the Marketo documentation for creating a service. Search: "Create a Custom Service for Use with REST API".*

1. In Marketo, create a custom service. Give it a logical name, such as "Radius REST API".
2. For API User, enter the name of the API user you just created.

3. View details for the new service. Locate these credentials and copy them to a clipboard.
 - Client ID
 - Client Secret
4. Navigate to the Web Services page. In the REST API section, locate this credential and copy it to a clipboard.
 - Endpoint

Get SOAP API Credentials from Marketo

Radius also needs your Marketo SOAP API credentials. Find and record them, so you can enter them in Radius.

? If you need to, consult the Marketo documentation for general information on navigation and API configuration. Search: “Configuring Your SOAP API Settings”.

In Marketo, navigate to the Web Services page. In the SOAP API section, locate these credentials. Write them down or copy them to a clipboard.

- Endpoint
- User ID
- Encryption Key

Connect Marketo to Radius

To connect Marketo to Radius, you’ll follow a simple wizard and paste in the SOAP and REST API credentials you retrieved from your Marketo setup.

1. Log in to Radius as an administrator. From the drop-down menu under your name, select **Integrations**.
2. Under Available Integrations, find Marketo. Click **Connect** to start the setup wizard, then follow along.
3. Enter your Marketo SOAP and REST API credentials when requested.
4. Click **Continue**.

Map Marketo Lead Fields to Radius Fields and Start the Matching Process

Mapping Marketo lead fields to Radius fields tells Radius what to match. Start the match process to sync the two systems and match records.

Important: Syncing Marketo and Radius may take some time, but you can still use Radius while the sync process is running.

1. On the wizard’s Mapping page, select the Marketo lead field, such as Last Name (A), that you want to map to each Radius field.
2. Optionally, enter a Marketo lead ID in Radius to preview that lead’s mappings and matched fields in Radius. In Marketo, open the record of a lead you want to preview and either:
 - Copy the lead ID from the end of the URL for that record to your clipboard or
 - Click the Leads tab in Marketo, where you can view all your leads and copy multiple IDs.In Radius, paste the leadID into the Search field (B) on the Marketo mapping page.
3. Click **Continue**.
4. When the wizard prompts you, click **Start Matching** to start the Marketo–Radius sync process.

OVERVIEW AUTHORIZATION MAPPINGS CANCEL

Marketo: Map Data Fields

Map these Radius fields with the corresponding fields in Marketo.

Radius	Marketo	
First Name	First Name	<input type="text" value="Search by Marketo ID"/>
Last Name	Last Name	
Job Title	Job Title	
Company Name	Company Name	
Main Phone	Main Phone	

Map these Radius fields with the corresponding fields in your Marketo REVIEW CHANGES

View the Marketo Overview Dashboard

After the integration is complete, you can use the Marketo Overview dashboard to view high-level information about your Marketo–Radius integration, including the connection status and the number of Marketo leads that Radius is connected to.

To access the dashboard, click **Integrations** under your name and click **View Details** for Marketo. From the Marketo Overview dashboard, you can also click **Matching Manager** to view additional match rate and data quality information.

RADIUS SEGMENTS INSIGHTS PERFORMANCE B. MURRAY

Integrations / Marketo

OVERVIEW MAPPINGS MATCHING MANAGER

Marketo: 248,324 LEADS

Describes this connection to a user who might be curious about it. The essential information about Marketo. The essential information.

+7,345 (1.2%)[▲] LAST SEVEN DAYS +12,854 (2.1%)[▲] LAST THIRTY DAYS

Connected CONNECTION STATUS RECONFIGURE

8 Hours Ago / 3 Minutes LAST SYNC / DURATION 10,500 LEADS IN LAST SYNC

REST Details: ENDPOINT URL: [https://7048264333.marketo.com/lead](#) USER ID: 7048264333

SOAP Details: ENDPOINT URL: [https://7048264333.marketo.com/lead](#) USER ID: 7048264333

Verify Your Connection: VERIFY HEALTH

You can verify the health of your Salesforce integration. Radius will run several checks to ensure that there won't be any problems while syncing.

If you have any questions, please email support@radius.com.