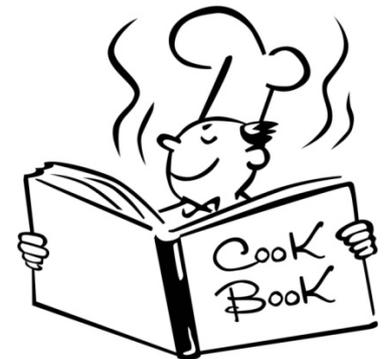


Import Data From Marketo

OPENRISE

Cook Book Series



Recipe Overview

This is a recipe to import data from Marketo

- Create an API role in Marketo
- Create an API only user
- Create a custom service
- Obtain client ID and secret
- Obtain API endpoint and identity URL
- Create a Marketo leads data source
- Create a Marketo activities data source
- Import Marketo data

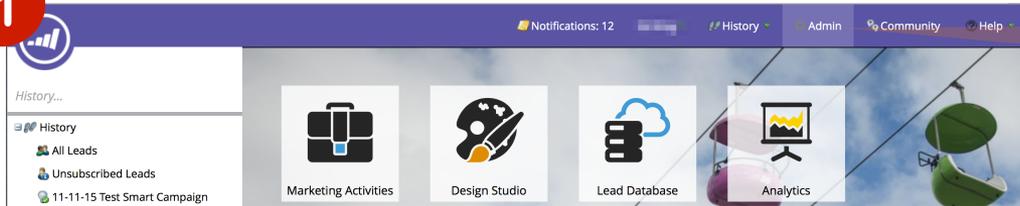
You will need the following:

- Marketo account with Standard edition or higher
- Marketo administrator credentials

Create an API role in Marketo

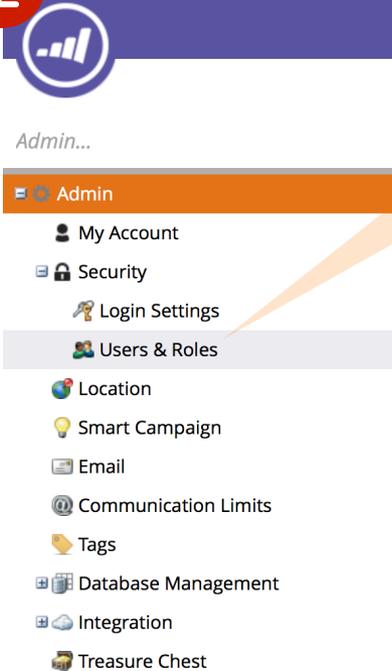
Login to Marketo with administrator credentials.

1



Click on "Admin" to get to the administrative settings page.

2

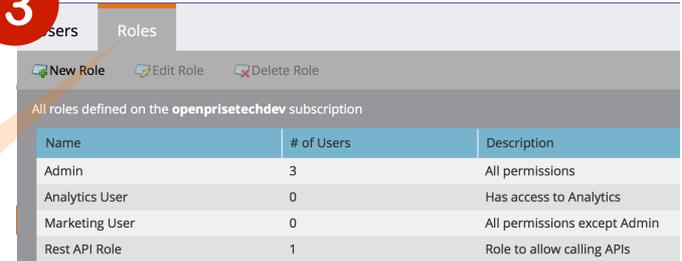


Choose "Users & Roles" under "Security" to create an API role.

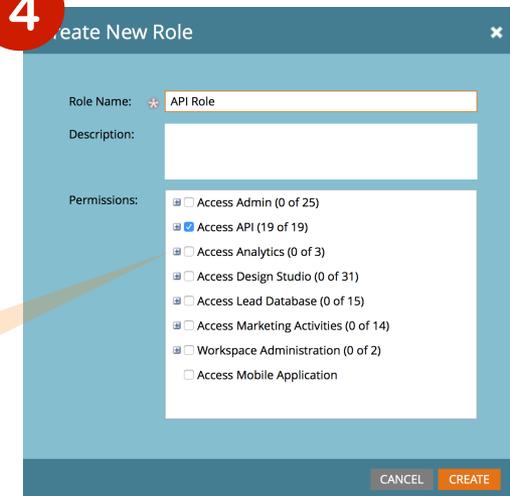
Go to the "Roles" pane and click on "New Role" to create an API role.

Create the API role and ensure that the role has "Access API" permissions granted.

3

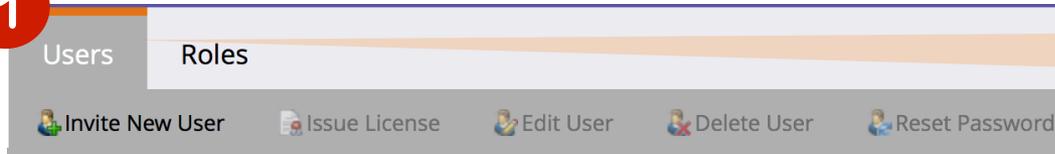


4



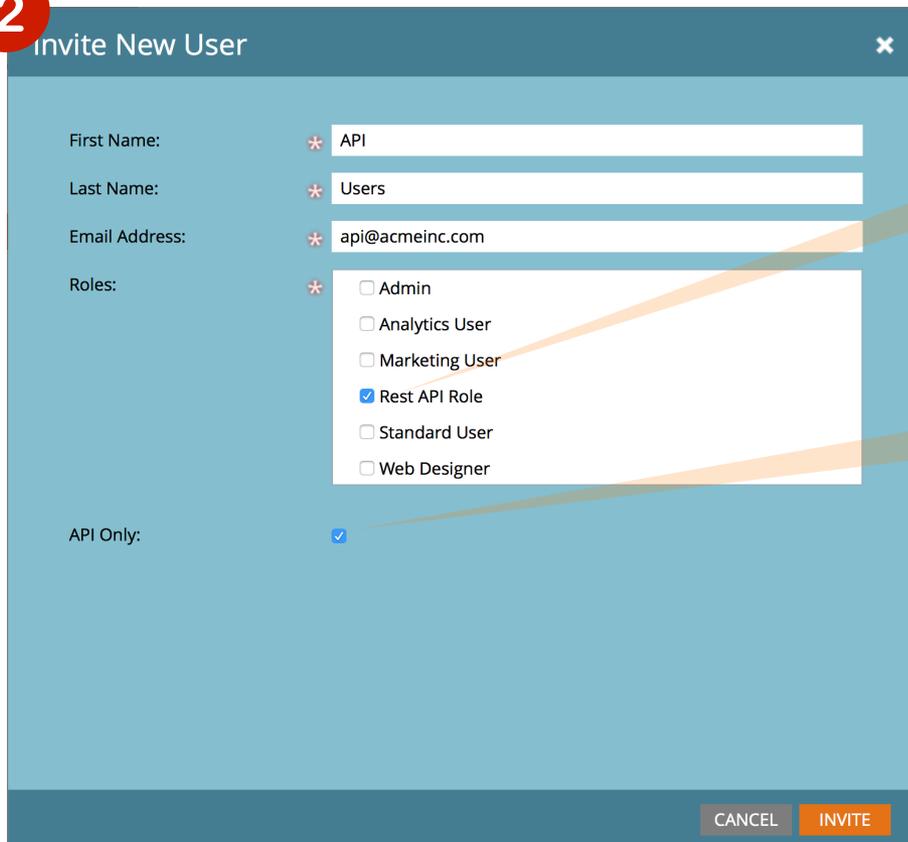
Create an API only user

1



Go to the “Users” pane and click on “Invite New User” to create an API only user.

2



Invite New User

First Name: * API

Last Name: * Users

Email Address: * api@acmeinc.com

Roles: *

- Admin
- Analytics User
- Marketing User
- Rest API Role
- Standard User
- Web Designer

API Only:

CANCEL INVITE

Create the user and ensure that only the API role created in the previous step is selected in Roles.

Make sure to check the “API Only” checkbox then click on “Invite” to create the user.

Create a custom service

1



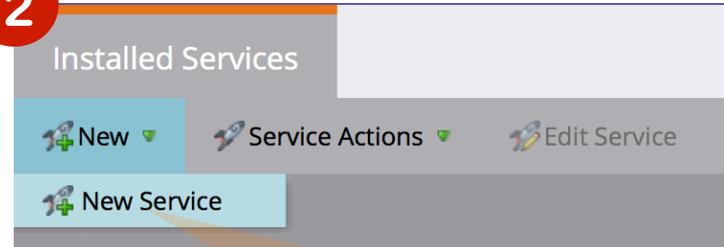
Admin...

- Admin
 - My Account
 - Security
 - Location
 - Smart Campaign
 - Email
 - Communication Limits
 - Tags
 - Database Management
 - Integration
 - CRM
 - Sales Insight
 - Landing Pages
 - Munchkin
 - Web Services
 - LaunchPoint**
 - Webhooks
 - Single Sign-On
 - Treasure Chest

In administrative settings page, choose the "LaunchPoint" option under "Integration" to create a custom service.

Make sure to choose "Custom" for the "Service:" field and the API user created in the previous step in the "API Only User:" field.

2



Under "New", click on "New Service" to create a new custom service.

3

A screenshot of the "New Service" form. The form has a title bar with a close button. It contains several fields:

- Display Name: * Openprise API Service
- Service: * Custom
- Settings section:
 - Description: * For Openprise to connect to Marketo
 - API Only User: * api@acmeinc.com

At the bottom right, there are two buttons: "CANCEL" and "CREATE".

Obtain client ID and client secret

1

Openprise API Service Custom 0 Active [View Details](#)

Look for the custom service you created in the previous step and click on "View Details".

2

Details

Client Id: 24124bcd-7aee-4209-92b9-2809bcfbcbda

Client Secret: UXefQiHYRsXP4mo5LAKOEajL0xPJLpNQ

Authorized User: api@acmeinc.com

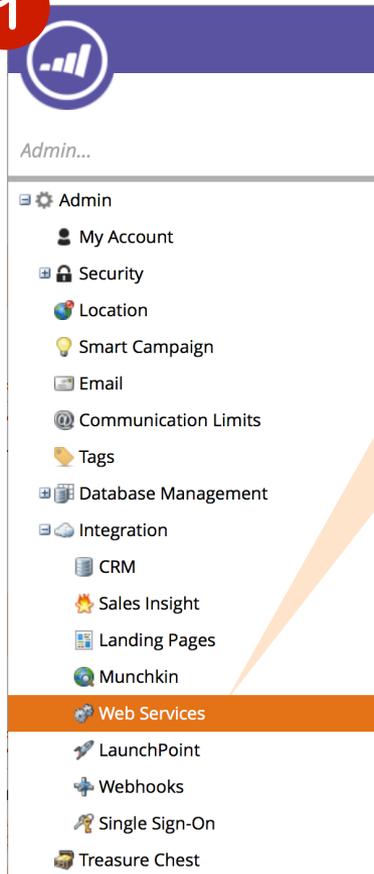
[GET TOKEN](#)

[CLOSE](#)

Copy and save the client ID and client secret that is listed in the Details pop-up. This will be used later when creating an Openprise data source.

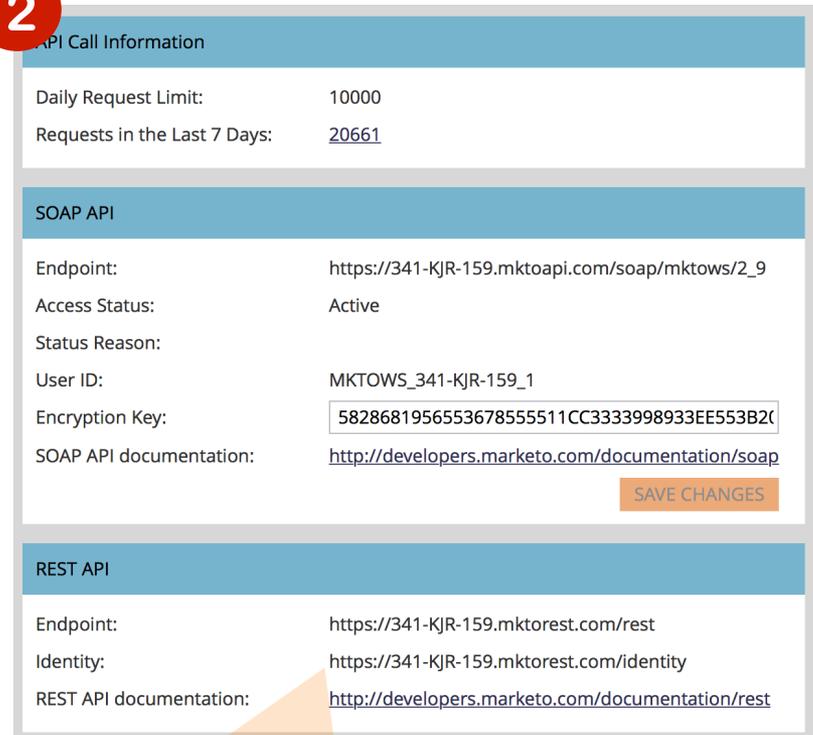
Obtain API endpoint and identity URL

1



In administrative settings page, choose the “Web Services” option under “Integration”.

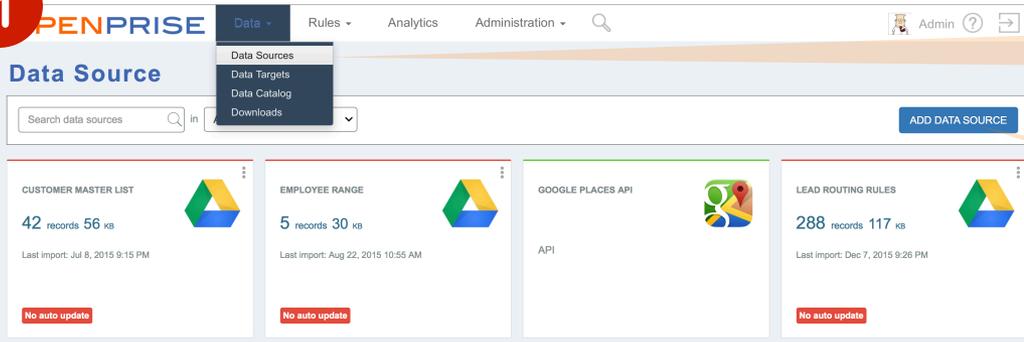
2



Copy and save the “Endpoint” and “Identity” URLs that are listed. This will be used later when creating an Openprise data source.

Create a Marketo leads data source

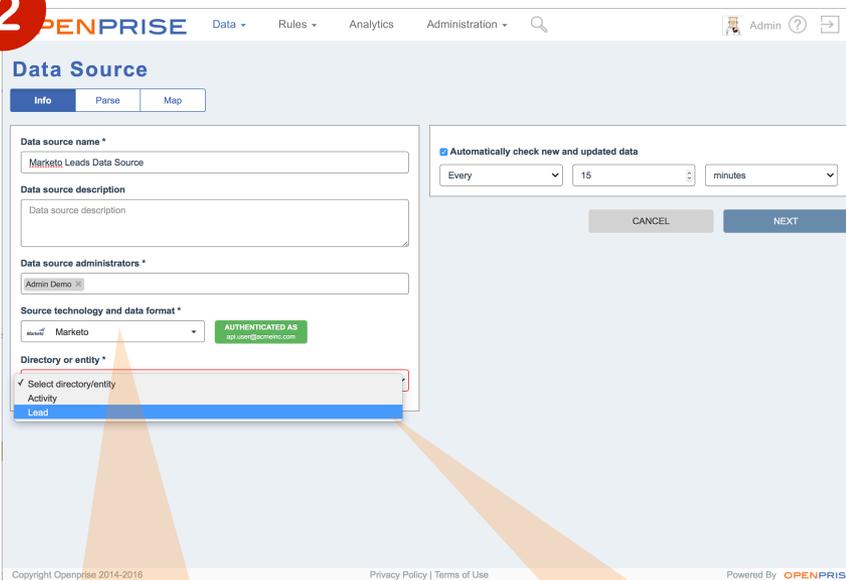
1



In the "Data" dropdown list, click on "Data Sources" to go to the Data Source screen.

Click on "Add Data Source" to create a new data source .

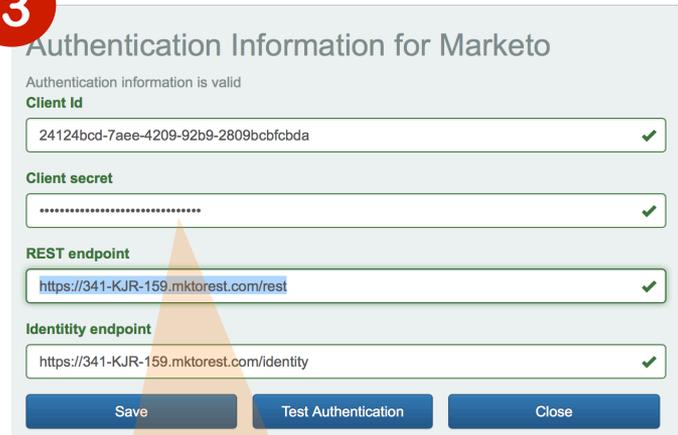
2



Pick "Marketo" and click on "Authenticate" to enter Marketo authentication details.

Pick the "Lead" entity to import from Marketo for this data source.

3



Enter the client ID, client secret, API endpoint URL and identity URL obtained in earlier steps. Test the authentication is fine and save.

Verify sample data

Verify that sample data from your Marketo environment is showing without issues.

OPENPRISE Data ▾ Rules ▾ Analytics Administration ▾   Admin  

Data Source

Info **Parse** Map

File or entity * ▾ Data starting row number * ▾ Column header is in row number ▾

	A	B	C	D	E	F	G	H	I	J	K	
1	company	website	mainPhone	annualRevenue	numberOfEmployees	industry	sicCode	id	firstName	middleName	lastName	e
2	Openprise2	openprisetech.com						1				r
3	Salesforce							40352				t
4	Salesforce							40353				j
5	Salesforce							40354				r

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Choose attributes to import

OPENPRISE Data ▾ Rules ▾ Analytics Administration ▾   Admin  

Data Source

Info Parse **Map**

Timezone *
(GMT+00:00) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London ▾

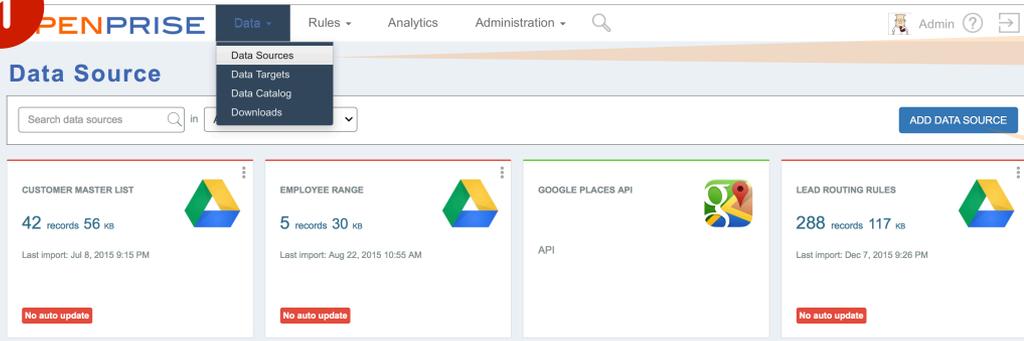
Import <input type="checkbox"/>	Name	Type	Unit of measure
<input checked="" type="checkbox"/>	annualRevenue Sample Values	Real number ▾	Please enter unit
<input checked="" type="checkbox"/>	city Sample Values	Text, single-value (comma is part of text) ▾	Please enter unit
<input checked="" type="checkbox"/>	company Sample Values	Text, single-value (comma is part of text) ▾	Please enter unit
<input checked="" type="checkbox"/>	country Sample Values	Text, single-value (comma is part of text) ▾	Please enter unit
<input type="checkbox"/>	createdAt Sample Values	Date ▾	Please enter unit
<input checked="" type="checkbox"/>	email Sample Values	Text, single-value (comma is part of text) ▾	Please enter unit
<input checked="" type="checkbox"/>	emailInvalid Sample Values	Yes or No ▾	Please enter unit
<input checked="" type="checkbox"/>	fax Sample Values	Text, single-value (comma is part of text) ▾	Please enter unit

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Choose the attributes to import. It is best to import only the attributes that you need for processing. When done, click on “Finish” at the bottom of the page.

Create a Marketo activities data source

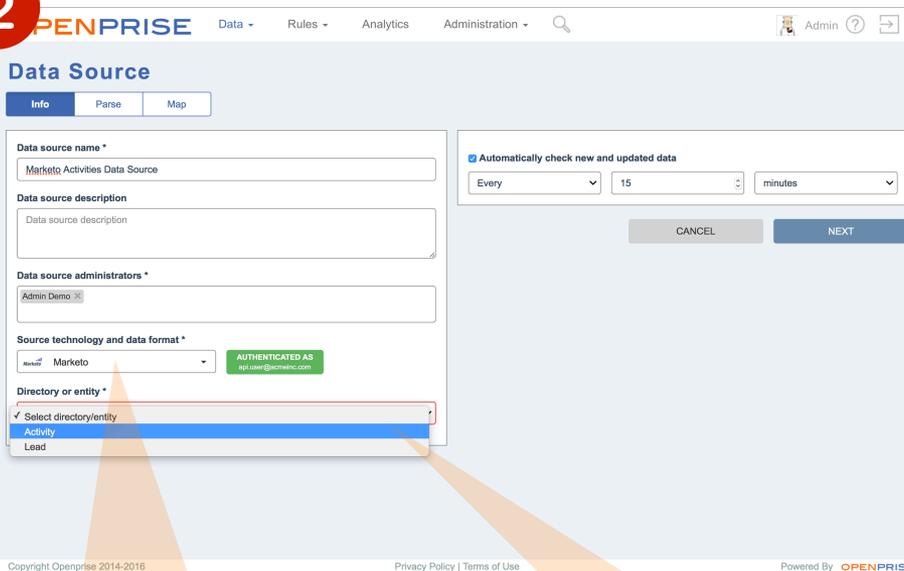
1



In the "Data" dropdown list, click on "Data Sources" to go to the Data Source screen.

Click on "Add Data Source" to create a new data source .

2



Pick "Marketo" and click on "Authenticate" to enter Marketo authentication details.

Pick the "Lead" entity to import from Marketo for this data source.

3

Authentication Information for Marketo

Authentication information is valid

Client Id

24124bcd-7aee-4209-92b9-2809bcbfcbda ✓

Client secret

..... ✓

REST endpoint

https://341-KJR-159.mktorest.com/rest ✓

Identity endpoint

https://341-KJR-159.mktorest.com/identity ✓

Save Test Authentication Close

Enter the client ID, client secret, API endpoint URL and identity URL obtained in earlier steps. Test the authentication is fine and save.

Verify sample data

Verify that sample data from your Marketo environment is showing without issues.

OPENPRISE Data ▾ Rules ▾ Analytics Administration ▾ 🔍 Admin ? ↗

Data Source

Info **Parse** Map

File or entity * Data starting row number * Column header is in row number

	A	B	C	D	E	F	G	H	I	J	K	L
1	id	activityLeadId	activityTypeId	activityName	activityDescription	activityDetail	Webpage ID	Webpage Name	Client IP Address	Query Parameters	Referrer URL	Search Engine
2	214439	40352	12	New Lead	New person/record is added to the lead database	[REDACTED]						
3	214440	40353	12	New Lead	New person/record is added to the lead database	[REDACTED]						
4	214441	40354	12	New Lead	New person/record is added to the lead database	[REDACTED]						
5	214442	40355	12	New Lead	New person/record is added to the lead database	[REDACTED]						

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Choose attributes to import

OPENPRISE Data ▾ Rules ▾ Analytics Administration ▾ 🔍  Admin  

Data Source

Info Parse **Map**

Timezone *
(GMT+00:00) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London ▾

Import <input checked="" type="checkbox"/>	Name	Type	Unit of measure
<input checked="" type="checkbox"/>	Acquired By <small>Sample Values</small>	Text, single-value (comma is part of text) ▾	Please enter unit
<input checked="" type="checkbox"/>	activityDate <small>Sample Values</small>	Date ▾	Please enter unit
<input checked="" type="checkbox"/>	activityDescription <small>Sample Values</small>	Text, single-value (comma is part of text) ▾	Please enter unit
<input checked="" type="checkbox"/>	activityDetail <small>Sample Values</small>	Text, single-value (comma is part of text) ▾	Please enter unit
<input checked="" type="checkbox"/>	activityLeadId <small>Sample Values</small>	Text, single-value (comma is part of text) ▾	Please enter unit
<input checked="" type="checkbox"/>	activityName <small>Sample Values</small>	Text, single-value (comma is part of text) ▾	Please enter unit
<input checked="" type="checkbox"/>	activityTypeId <small>Sample Values</small>	Whole number ▾	Please enter unit
<input checked="" type="checkbox"/>	Artifact ID <small>Sample Values</small>	Whole number ▾	Please enter unit

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Choose the attributes to import. It is best to import only the attributes that you need for processing. When done, click on “Finish” at the bottom of the page.

Choose activities and time range to import

<input checked="" type="checkbox"/>	Webpage ID	Sample Values	Whole number	Please enter unit
<input checked="" type="checkbox"/>	Webpage Name	Sample Values	Text, single-value (comma is part of text)	Please enter unit
<input checked="" type="checkbox"/>	Webpage URL	Sample Values	Text, single-value (comma is part of text)	Please enter unit

Primary Timestamp Attribute *	Modified Timestamp Attribute	Unique Attribute
createdAt	Select modified timestamp attribute	id

Delete type:

Soft Delete - Records deleted from the source system will be marked "Yes" in the OPDeleted attribute

Hard Delete - Records deleted from the source system will be deleted from this data source

Activities to import *

Visit Webpage ✕Fill Out Form ✕Click Link ✕Email Delivered ✕Email Bounced ✕Unsubscribe Email ✕Open Email ✕Click Email ✕New Lead ✕Email Bounced Soft ✕Merge Leads ✕Open Sales Email ✕Click Sales Email ✕Interesting Moment ✕Sales Email Bounced ✕Click Shared Link ✕

Starting date *

03/01/2015	12:00:00
------------	----------

Choose the activities that you want to import. It is recommended to bring in only the activities that are of interest. Openprise defaults to a subset of available types and you should review this subset before saving the data source.

Choose the time range of activities that you want to import. This is a required field because there are typically a large amount of activities across all time. Please enter the time range of interest to you.

Import Marketo Data

MARKETO LEADS DATA SOURCE

43,476 records 31 MB

Last import: Jan 29, 2016 11:55 AM
Next import: Jan 29, 2016 12:00 PM

Auto update

Use the mini menu here to “Import now” if you do not want to wait for the scheduled import.

After creating the data source, the Marketo data sources can be seen in the Data Source list. This card shows the number of records brought in, its size, last import time and next import time.

Search

Import now

Download

Import now is available in the mini menu.

Recipe Review

Recommendations

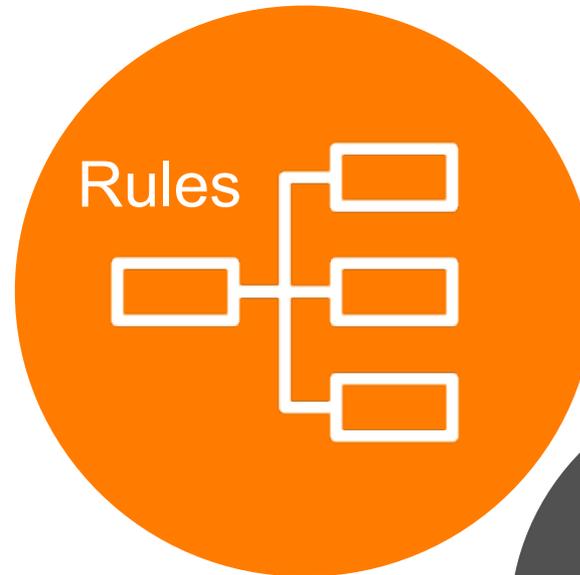
- Access API permissions that are absolutely necessary for Openprise are
 - Read-Only Activity, Read-Only Assets, Read-Only Campaign, Read-Only Custom Object, Read-Only Lead, Read-Write Activity, Read-Write Lead
- Marketo API access is only available to Standard editions or higher. Spark edition does not have API access.
- Import only the lead attributes that you need from Marketo
- Import only activity types within a constrained timeframe that you care about from Marketo to minimize data volume

Want to do more? Try the following on your own:

- Clean and normalize the Marketo data. For example: normalize state and country names, clean up company names
- Create a Marketo leads data target to push processed data back into your Marketo environment

OPENPRISE

Data Automation For Business Users



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