

Setting Up your Marketo REST Connector with NetLine

Please provide Netline with a spreadsheet of all API Fields/Values you want sent through the connector. **See example below.**

REQUIRED FIELDS/VALUES

- MunchkinId: 123-ABC-123
- ClientId: 0f3abcb4-zma1-4de4-92e6-1b2ccd3e0f4g
- ClientSecret: a1b2jk3vxlwEdASI4YnxNc5ZfBRf60i

STANDARD / CUSTOM FIELDS

Fields	Custom Values
firstName	
lastName	
email	
company	
address	
city	
postalCode	
country	Use abbreviations i.e. US
phone	
title	
leadSource	Content Syndication
assetName	The asset the person downloaded
Company_Size__c	1-10 11-99 100-249 250-999 1000-2499 2500-4999 5000+
Revenue_Range__c	\$0-1 Million \$1-10 Million \$10-50 Million \$50-100 Million \$100-250 Million \$250-500 Million \$500M-1 Billion > \$1 Billion

Comprehensive list of Marketo standard fields available:

<https://developers.marketo.com/rest-api/lead-database/fields/list-of-standard-fields/>

How to create custom fields:

<https://docs.marketo.com/display/public/DOCS/Create+a+Custom+Field+in+Marketo>

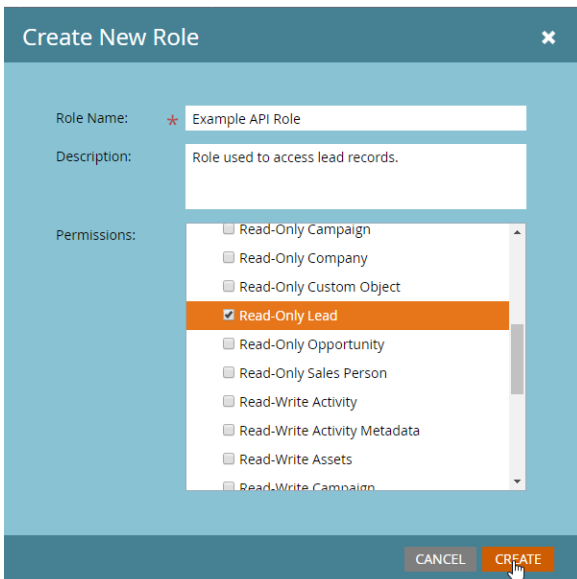
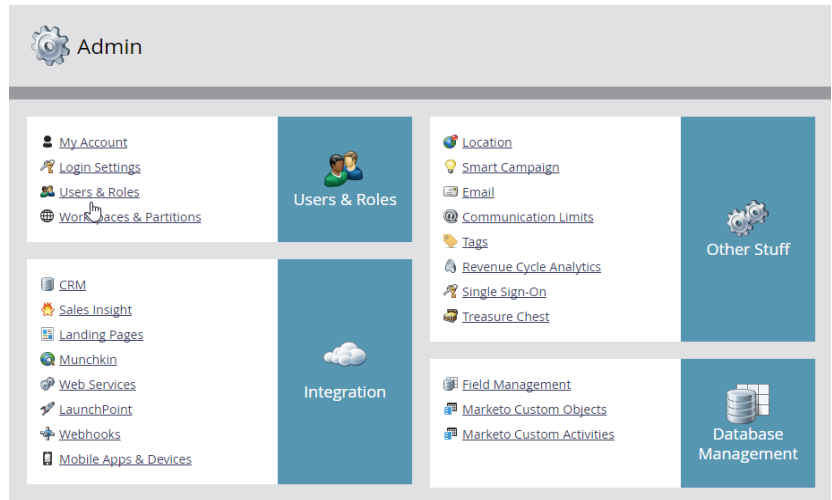
Connecting Your NetLine Content Syndication Leads to Marketo

SET UP MARKETO REST API

Set up your Marketo REST API: <https://developers.marketo.com/rest-api/>.

MARKETO REST API:

- To begin you will need to obtain API credentials so that you can make authorized calls to your instance. You will need to login to your instance and go to the Admin menu, then select Users & Roles.



CREATE A NEW ROLE

- Click on the Roles tab, and then New Role and assign at least the “Read-Only Lead” (or “Read-Only Person”) permission to the role in the Access API group. Be sure to give it a descriptive name and click on Create.

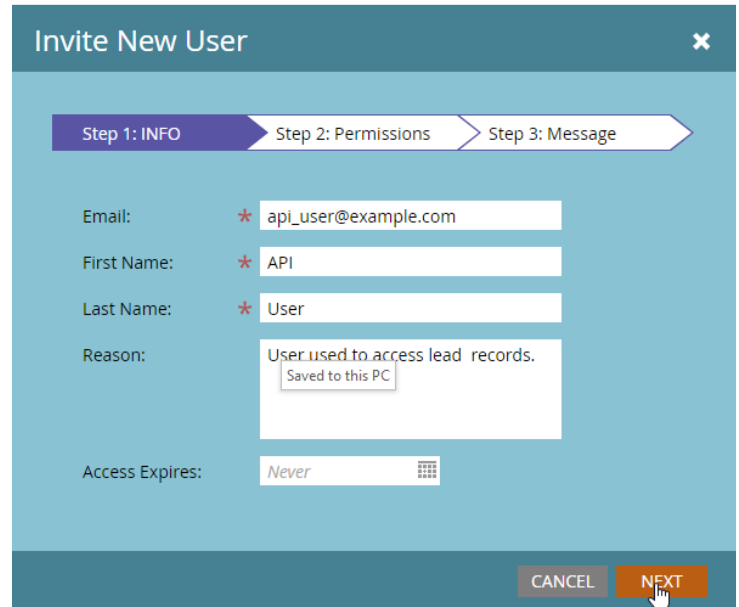
Note: Write access must be checked in permissions in order for the connector to post data to the Marketo database.

For more details on permissions see here:

https://developers.marketo.com/rest-api/custom-services/#role_permissions

INVITE NEW USER

- Now back to the Users tab and click on Invite New User. Give your user a descriptive name that indicates that it is an API user, as well as an Email Address and click on Next.



Invite New User

Step 1: INFO Step 2: Permissions Step 3: Message

Email: * api_user@example.com

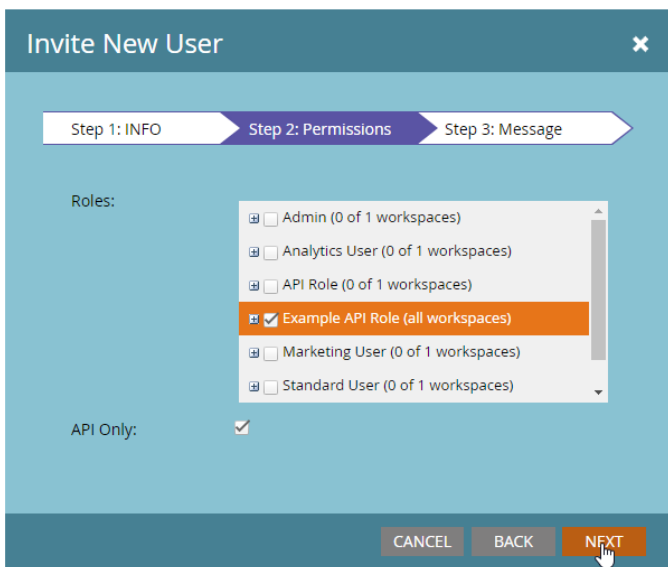
First Name: * API

Last Name: * User

Reason: User used to access lead records.
Saved to this PC

Access Expires: Never

CANCEL NEXT



Invite New User

Step 1: INFO Step 2: Permissions Step 3: Message

Roles:

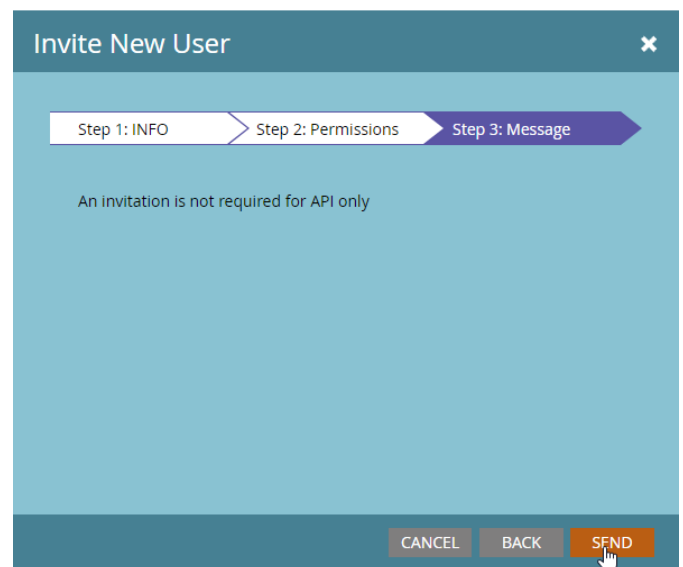
- Admin (0 of 1 workspaces)
- Analytics User (0 of 1 workspaces)
- API Role (0 of 1 workspaces)
- Example API Role (all workspaces)
- Marketing User (0 of 1 workspaces)
- Standard User (0 of 1 workspaces)

API Only:

CANCEL BACK NEXT

INVITE NEW USER-STEP TWO PERMISSIONS

- Check the API Only option and award your user the API role that you just created and click on Next.



Invite New User

Step 1: INFO Step 2: Permissions Step 3: Message

An invitation is not required for API only

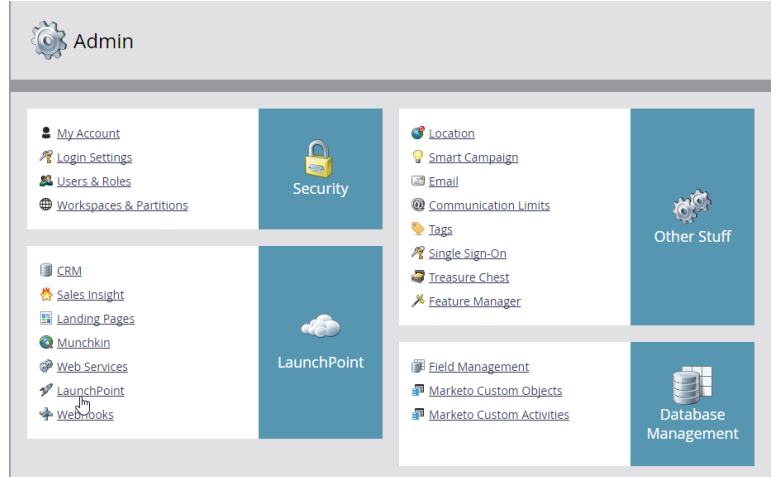
CANCEL BACK SEND

INVITE NEW USER-STEP THREE MESSAGE

- To complete the user creation process, click on Send.

RETURN TO ADMIN MENU

- Next, go to the Admin menu, then to Launchpoint.



New Service ✕

Display Name:

Service:

Settings

Description:

API Only User:

CANCEL
CREATE

NEW SERVICE

- Click on the New menu and select New Service. Give your service a descriptive name and select Custom from the Service dropdown menu. Give it a description, then select your new user from the API Only User dropdown menu and click on Create.

DETAILS

- Click on View Details for your new service to access the Client ID and Client Secret. For now you can click the Get Token button to generate an access token which will be valid for one hour. Save the token in a note for now.

Details ✕

Client Id: 6170fd81-b815-4929-973c-2e0f399c1c9d

Client Secret: dGCxesW3LdBPjh3JyAFqQEk984eh9oNp

Authorized User: api_user@example.com

GET TOKEN

799153c1-c059-432a-b295-27d34f2b01a8:q

CLOSE