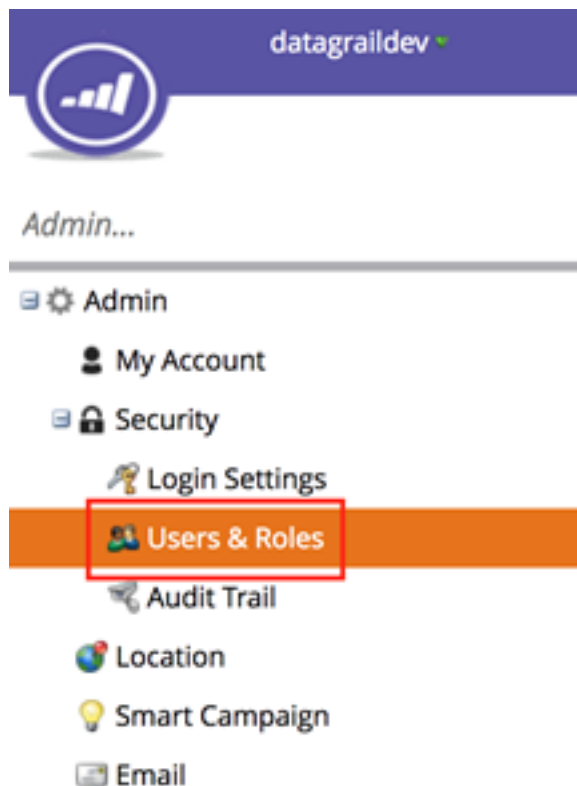


Marketo

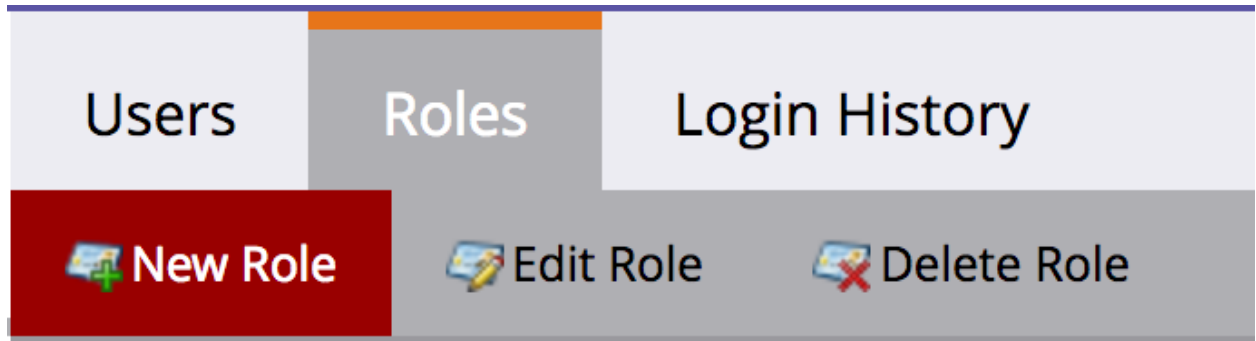
****Note:** if you do not have admin rights in Marketo you will not be able to complete this integration. Please contact your Marketo Admin for assistance.

Step 1: Create New Role & API-Only User

1. Log into your **Marketo** instance
2. Open **Admin**, click **Security**, then select **Users & Roles**



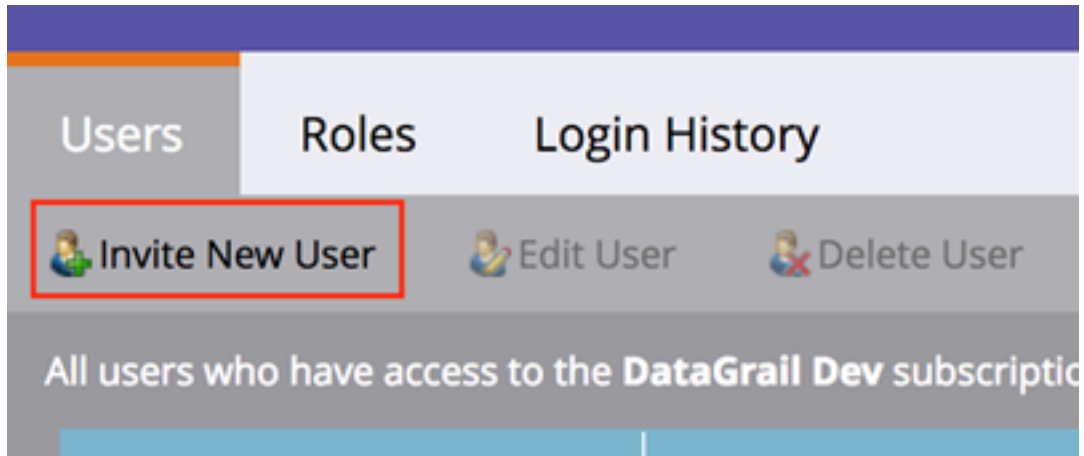
3. Click **Roles** then select >> **New Role**



4. In the **Create New Role** dialog, enter the following:

- a) **Role Name:** `dg_api_role`
- b) **Description:** We suggest you add something like "`Gives DataGrail limited access to data via authorized API`", but you can add anything you want.
- c) **Permissions:** Check all of the following under **Access API** tab to enable DataGrail to fulfill privacy regulation requirements on your behalf:
 - a) `Read-Only Assets`
 - b) `Read-Write Campaign`
 - c) `Read-Write Activity`
 - d) `Read-Write Activity Metadata`
 - e) `Read-Write Company`
 - f) `Read-Write Custom Object`
 - g) `Read-Write Named Account`
 - h) `Read-Write Named Account List`
 - i) `Read-Write Opportunity`
 - j) `Read-Write Person`
 - k) `Read-Write Sales Person`

5. Click **Users** then select >> **Invite New User**



6. Enter the following **Info**:

a) **Email:** `datagraildev+{company name}@datagrail.io`

b) **First** and **Last Name:** we suggest using your own name here.

Invite New User ✕


Step 1: Info Step 2: Permissions Step 3: Message

Email: ★

First Name: ★

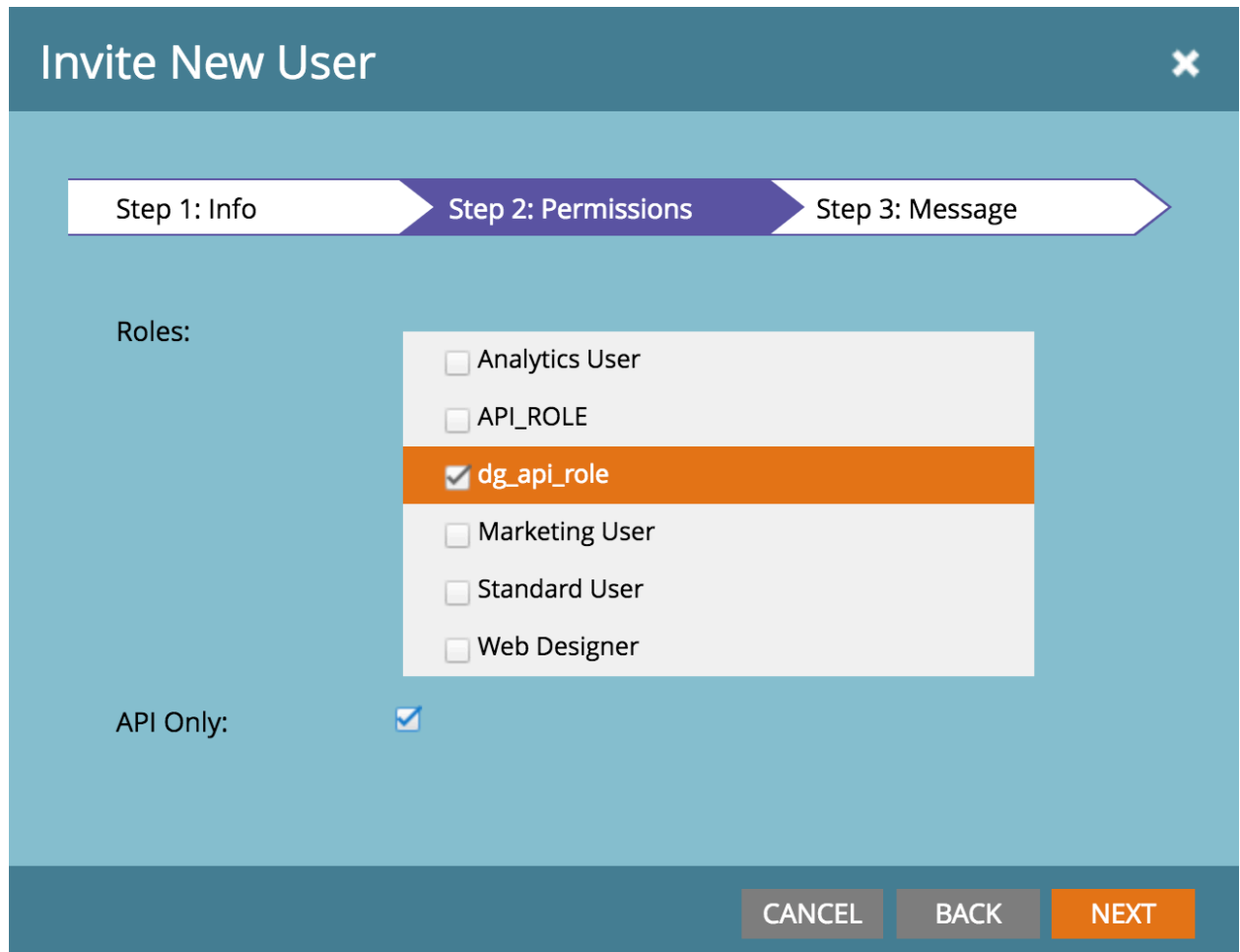
Last Name: ★

Reason:

Access Expires: 

CANCEL NEXT

7. Set the **Roles** to **dg_api_role**, created above:



Invite New User

Step 1: Info Step 2: Permissions Step 3: Message

Roles:

- Analytics User
- API_ROLE
- dg_api_role
- Marketing User
- Standard User
- Web Designer

API Only:

CANCEL BACK NEXT


8. **IMPORTANT:** Check **API Only** and then click **Next** to send the invitation to DataGrail.

Step 2: Add DataGrail as an Installed Service


1. Navigate to **Integration**, then click **LaunchPoint**.


Admin...

Admin

 My Account


Security

 Location

 Smart Campaign

 Email

 Communication Limits


 Tags

Database Management


Integration

 CRM

 Sales Insight

 Landing Pages

 Munchkin

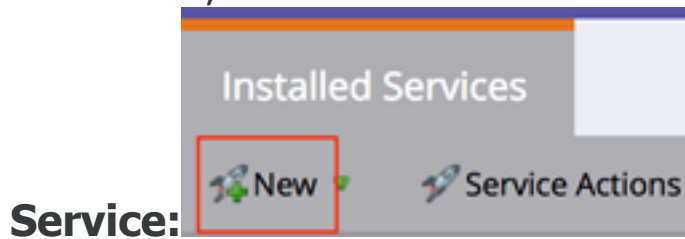
 Web Services

 **LaunchPoint**

 Webhooks

 **...**

2. Click **New**, then **New**



3. Enter the following values and click **Create**:

a) **Display Name:** DataGrail

b) **Service:** Custom

c) **Description:** Assist with GDPR, CCPA, and Data Privacy regulations

d) **API Only User:** select the user you created in **Step 1**
(`datagraildev+{company`

name}@datagrail.io)

New Service ✕

Display Name: * DataGrail

Service: * Custom

Settings

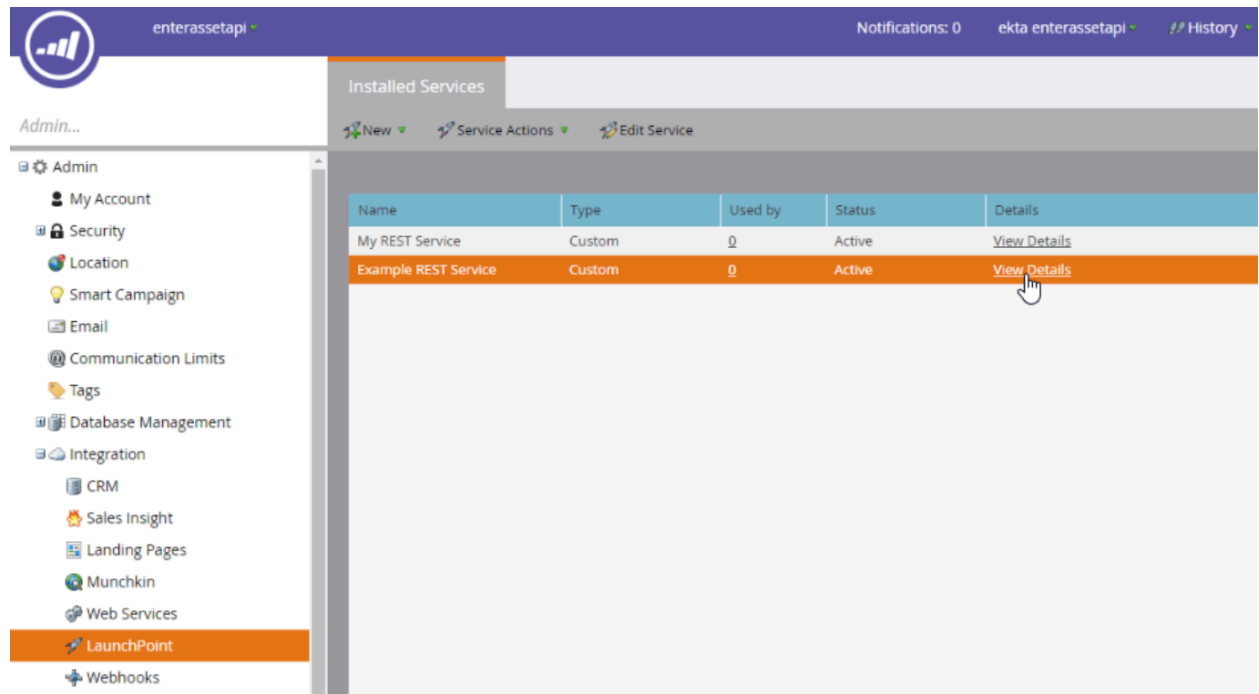
Description: *

API Only User: * earl+marketoapi@datagrail.io

CANCEL CREATE

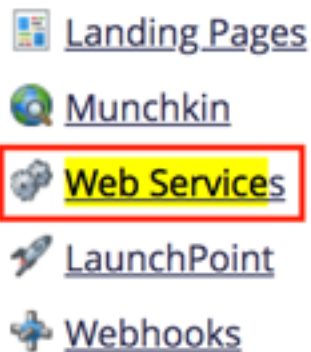
4. While in **LaunchPoint**, locate the **Client ID** and **Client Secret** by clicking **View Details** on the newly created **DataGrail Custom Service**. And store those values in a safe

location.



Step 3: Locate your Marketo Endpoint URL

1. In **Admin**, click **Integration**, then **Web Services**



2. Scroll to the **REST API** section and copy the **Endpoint** values into a safe. In this example we would copy `https://416-ATX-`

044.mktoreset.com/rest

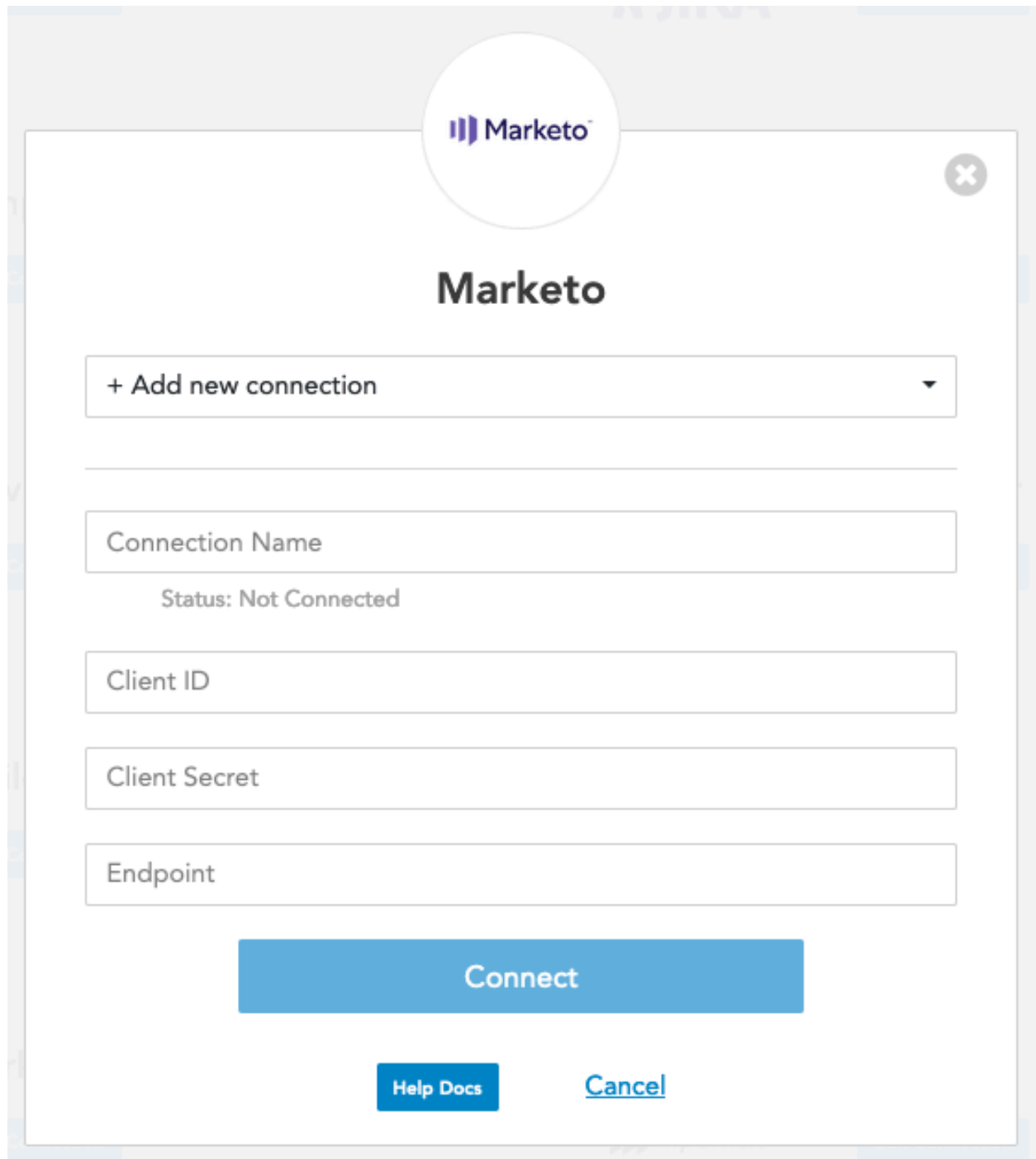
REST API

Endpoint:	https://416-ATX-044.mktoreset.com/rest
Identity:	https://416-ATX-044.mktoreset.com/identity
REST API documentation:	http://developers.marketo.com/documentation/rest

Step 4: Connect Marketo

1. Return to the **DataGrail Portal**.
2. Please wait **10 minutes** from generating the above credentials before proceeding on the below.
3. Enter **Client ID**, **Client Secret** and **Endpoint** obtained from **Step 2** and **Step**

3.



The screenshot shows a dialog box titled "Marketo" with a close button in the top right corner. At the top center is the Marketo logo. Below the title is a dropdown menu with the text "+ Add new connection". Underneath is a horizontal line. Below that is a text input field labeled "Connection Name" with the status "Status: Not Connected" displayed below it. This is followed by three more text input fields labeled "Client ID", "Client Secret", and "Endpoint". At the bottom of the dialog is a large blue button labeled "Connect". Below the "Connect" button are two smaller buttons: "Help Docs" and "Cancel".

4. Click **Connect Marketo**.

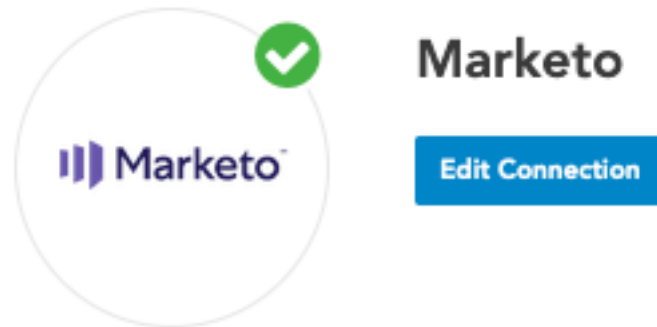
5. When connected, you will see a message at the top.

Successfully connected Marketo!

x

6. If there are additional **Marketo** accounts to integrate follow these instructions:

a) Click **Edit Connection** within the Integration page



for **Marketo**.

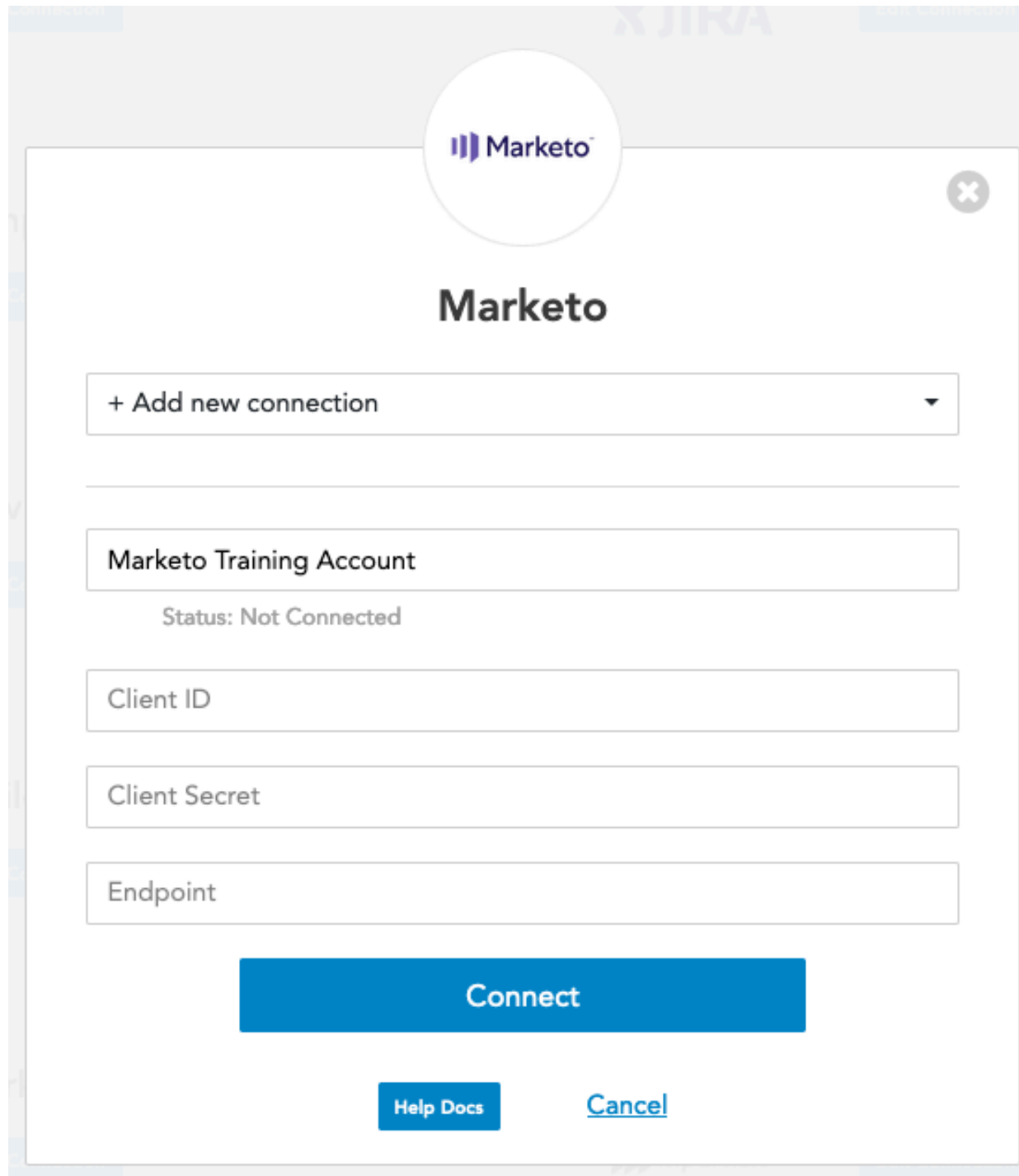
b) From the drop-down, select **+Add New Connection**

c) Under **Connection Name**, enter a new name to identify this separate account {ex: *Marketo Training Account*}.

d) Repeat **Step 2** and **Step 3** to copy **Client Id**, **Client Secret** and **Endpoint** for this new account.

e) Enter the **Client ID**, **Client Secret** and **Endpoint** obtained from **Step 2** and **Step 3**

f) Click **Connect**



The screenshot shows a configuration window for Marketo. At the top center is the Marketo logo, and at the top right is a close button (X). Below the logo, the word "Marketo" is displayed in a large, bold font. Underneath, there is a dropdown menu with the text "+ Add new connection" and a downward arrow. Below this is a horizontal separator line. The main configuration area contains a text box with the text "Marketo Training Account" and "Status: Not Connected" below it. Below that are four more text boxes, each with a label: "Client ID", "Client Secret", and "Endpoint". At the bottom of the configuration area is a large blue button labeled "Connect". Below the "Connect" button are two smaller buttons: "Help Docs" and "Cancel".

7. In the **DataGrail Portal**, if you have any other integrations not connected (no green check mark) please click **Connect** to complete the configuration and reference the **Help Docs** link for instructions

Please email us at DataGrail at [**support@datagrail.io**](mailto:support@datagrail.io) with any issues or questions regarding your integrations!