zoominfo
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Implementation Guide

ZoomInfo for Marketo

Overview

Setting up the ZoomInfo/Marketo integration makes it possible to quickly send records from ZoomInfo and ReachOut to create Marketo Leads and Companies.

Configure Marketo

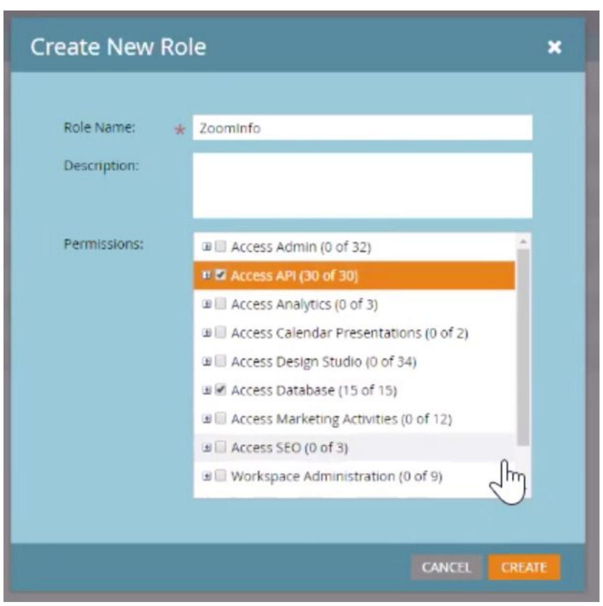
ZoomInfo integrates with Marketo using its REST API. To support the integration, you must configure an API Only role and API Only user that you link to a custom LaunchPoint service.

The following sections provide a basic procedure on how to create the required configuration. As this is a common configuration used to integrate with the Marketo REST API, you can refer to the Marketo documentation for additional details.

Create an API Only role

Create a new API Only role.

Field	Description
Role Name	Provide a name that will make it easy to identify as the role used for the ZoomInfo integration (e.g., *ZoomInfo API Only*)
Permissions	**Access Admin**: Access Field Management **Access API**: Read-Write Company, Read-Write Person **Access Database**: Advanced List Import

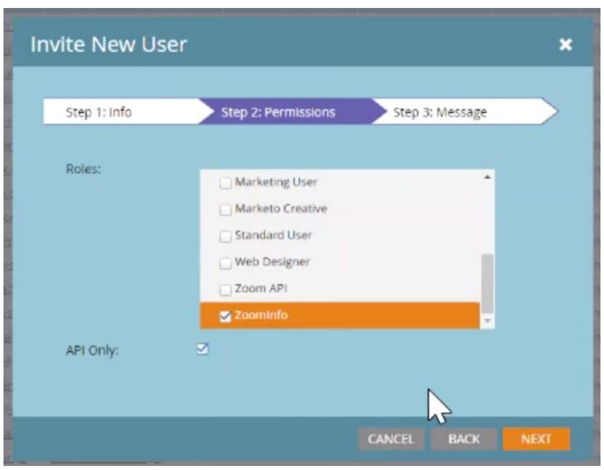


See the Marketo documentation for more details on [Marketo role permissions](#).

Create an API Only user

1. Create an API Only user and associate it with the API Only role you created earlier.

Field	Description
Email	This email address is required to create the user, but will not receive email. (e.g., *zoominfo.integration@zoominfo.com*)
First Name	ZoomInfo
Last Name	Integration
Roles	Select the API Only role you created earlier (e.g., *ZoomInfo API Only*)
API Only	Check the **API Only** checkbox

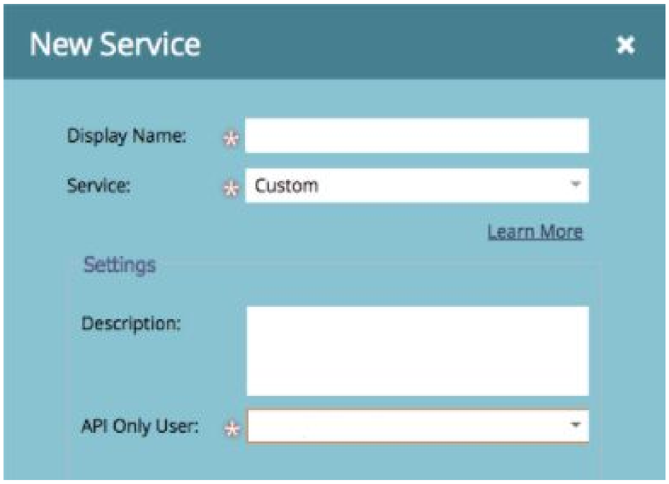


2. Click **Send** to create the user.

Create a custom LaunchPoint service

1. Navigate to **Admin > LaunchPoint**.

2. Under **New**, click **New Service**.



Field	Description
Display Name	Type a name for the service (e.g., *ZoomInfo Integration*)
Service	Select **Custom**
Description	Type a description (e.g., *ZoomInfo Integration*)
API Only User	Select the API only user created earlier (e.g., *zoominfo.integration@zoominfo.com*)

Marketo credentials

ZoomInfo admins and users will connect to Marketo using:

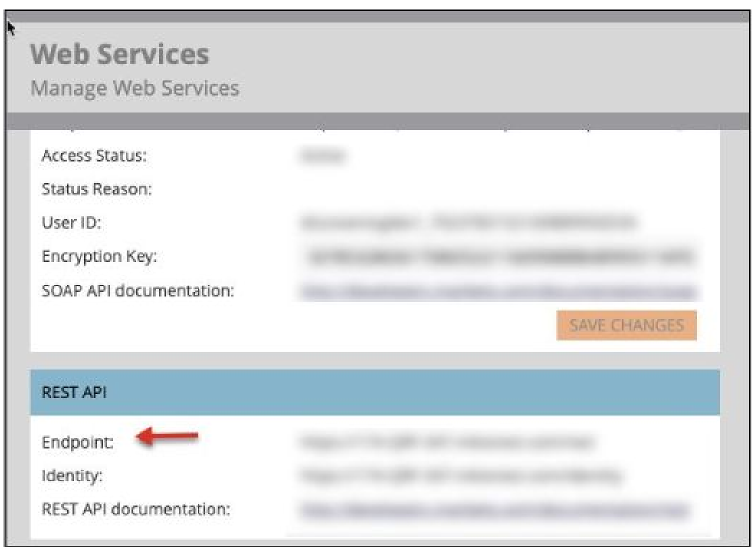
- Client ID and Client Secret
- Instance URL

Client ID and Client Secret

1. View the details of the custom LaunchPoint service created earlier to obtain the **Client ID** and **Client Secret**.
2. Copy/paste the **Client ID** and **Client Secret** (for example, to Notepad) for use when configuring the connection.

Instance URL

1. Find the **Instance URL** in Marketo under **Admin > Web Services** in the REST API section.
2. Use the Endpoint value, ensuring that the Instance URL you provide in ZoomInfo:
   - Includes *https://* at the beginning
   - Does not include */rest* at the end



More information

For general information about API access, see the Credentials for API Access section in the Marketo documentation.

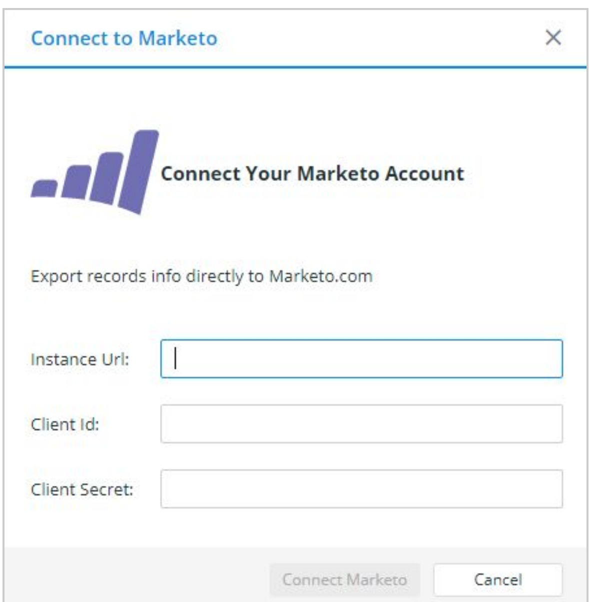
Get connected

ZoomInfo admins enable the Marketo integration for users and control user preferences including export settings, custom mappings, and privacy settings. ZoomInfo users can then connect to Marketo (with admin assistance) using the same credentials.

Admins

A ZoomInfo admin establishes the integration with Marketo that enables ZoomInfo users to connect and export data to Marketo.

1. Go to **Admin Portal > Integrations**.
2. Under the Marketo integration tile, click **Connect**.
3. Review the data validation pop-up and click **Confirm**. For details about data-sharing and privacy configuration see [Privacy Center (admins only)].



4. Provide the **Instance URL**, **Client ID** and **Client Secret**. See [Marketo credentials] for details.

   Note: The Marketo login window is a pop-up. If the login window does not display, ensure that you have pop-up blockers disabled on your current tab.

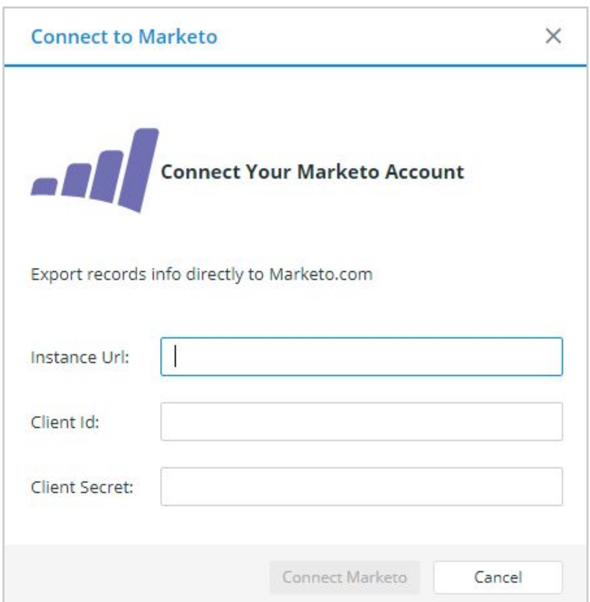
Important: You can enable exports using default export and mapping settings for all users using the toggle switch to the right of the **Manage** link. However, as a best practice, you should configure export preferences and custom mapping settings first.

Users

Once the ZoomInfo admin has enabled the integration for all users by clicking the toggle switch to the right of the **Manage** link, the admin can assist ZoomInfo users with their connection to Marketo.

1. Click the user icon at the top right and select **Settings** from the drop-down menu.

2. Click the **Integrations** tab and select **Connect** under the Marketo tile.



3. Provide the **Instance URL**, **Client ID** and **Client Secret**. See [Marketo credentials](#) for details.

   Note: The Marketo login window is a pop-up. If the login window does not display, ensure that you have pop-up blockers disabled on your current tab.

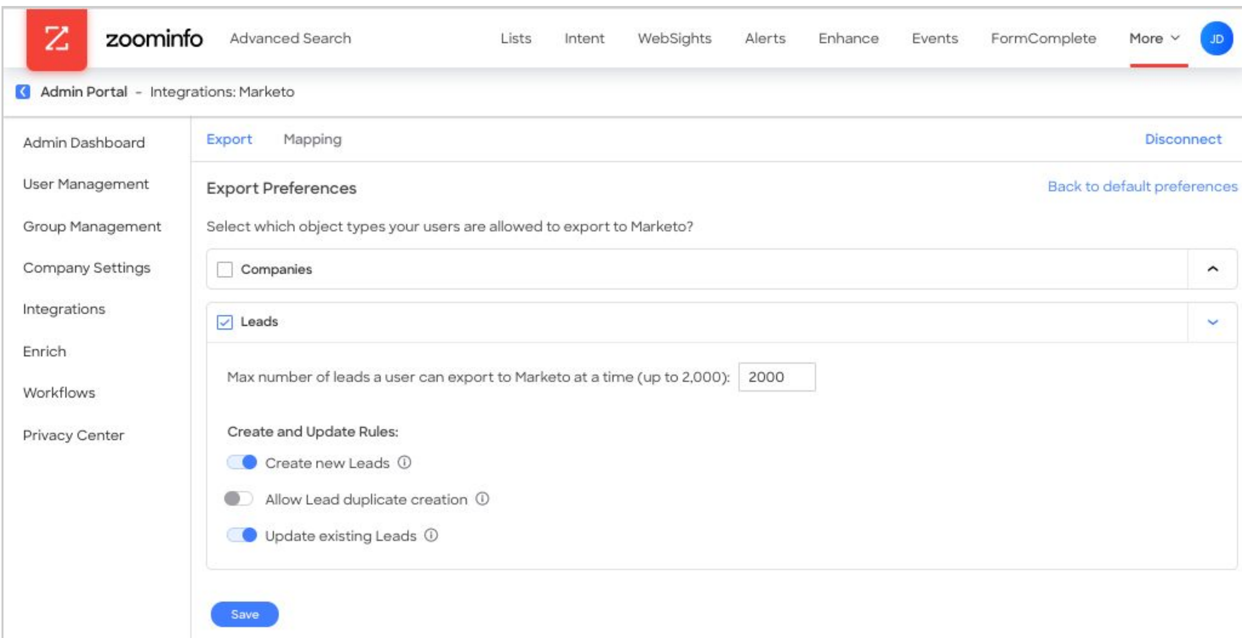
Export preferences (admins only)

ZoomInfo admins can limit the objects that can be exported:

1. Go to **Admin Portal > Integrations**.

2. Select **Manage** under the Marketo tile.

3. From the **Export** tab, select each object type you want your users to be able to export to Marketo. You can set a maximum number of records (up to 2000) that a user can export to Marketo.

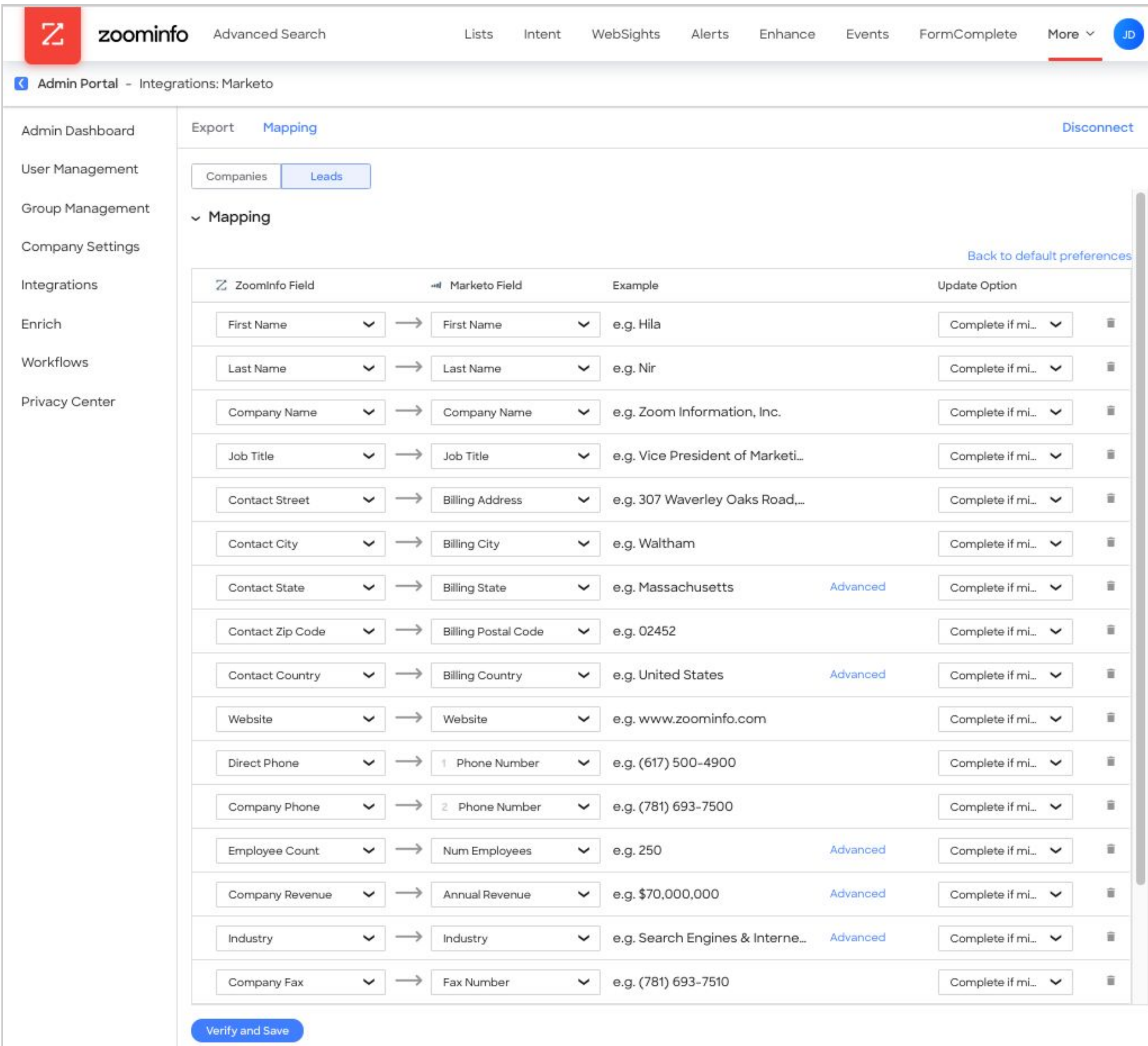


Important: If your organization has Marketo to Salesforce sync configured, you must uncheck the **Companies** checkbox, as the sync locks Marketo's Company object so that it is not exposed to the API. If you leave the **Companies** checkbox checked in this scenario, the Mapping tab will not load in ZoomInfo.

4. Click **Save** to apply the changes for all users in your organization's ZoomInfo instance.

Custom mapping (admins only)

1. Go to **Admin Portal > Integrations**.
2. Under the Marketo integration tile, click **Manage**.
3. Click the **Mapping** tab.



Under this tab, you can use the **Companies** and **Leads** tabs to review the default mappings for each object type and make any mapping changes.

Update options: For each field, you can select one of the following Update Options:

- Complete if missing (default) - only complete with ZoomInfo data if nothing exists in Marketo.

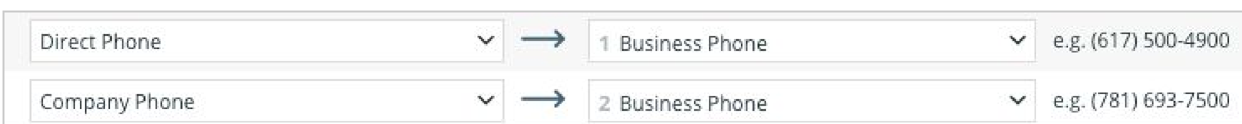
- Overwrite field - overwrites existing data in Marketo with ZoomInfo data.

Required fields: Required fields within Marketo are marked with a red asterisk.

Marketo values: All values listed under the Marketo Field column are retrieved directly from your Marketo instance.

Adding and removing fields: Add fields by clicking Add Row at the bottom of the page. Click the trash icon to remove any fields that you do not want sent from ZoomInfo to Marketo.

Setting a hierarchy for ZoomInfo data within a single Marketo field: In some cases, you may want multiple ZoomInfo fields to be stacked hierarchically within a single Marketo field. For example, you want to import the ZoomInfo Direct Phone and Company Phone fields into the Marketo Business Phone field. For example:



In this example:

- When users are exported to Marketo, the Direct Phone will map to the Business Phone.
- If a contact has both a Direct Phone and Company Phone in ZoomInfo, the first occurrence of the Marketo field will be denoted with number 1, and the second will be number 2.

- If a specific contact does not have a Direct Phone in ZoomInfo, we will send the Company Phone field to the Business Phone field in Marketo.

5. After configuring mappings for each object type, click **Verify and Save** at the bottom of the mapping page for each object. Verification requires that all ZoomInfo fields are mapped to a corresponding Marketo field.

    - If mappings are correctly configured, a success notification displays.

    - If the mappings are not set correctly, an error notification displays to note the specific field(s) to adjust. If you have secondary required fields set up for a specific Marketo field you will not be able to map to that field.

Duplicate checking

When a user exports records from ZoomInfo to Marketo, duplicate checking logic is applied to avoid creating duplicate records within Marketo.

Admin control of duplication settings

A ZoomInfo admin can control the user's available options for handling duplicates by configuring the default duplication settings for the integration in the Admin Portal. When a duplicate is encountered during export, users can choose the default behavior set by the admin or select other available options.

User options during export

During an export, duplicates are flagged and presented to the user. Depending on available options set by an admin, the user can choose to update an existing record, create a duplicate record, or not export the record.

Duplicate logic

ZoomInfo checks for specific criteria - in a specific order - to determine if existing data in Marketo matches data being exported.

For companies: When exporting companies to Marketo, ZoomInfo will check for duplicate Marketo companies based on the exact company name.

For people: People in ZoomInfo are designated as contacts, and can be exported as Marketo leads.

When exporting contacts to Marketo, ZoomInfo will check for duplicate Marketo leads using criteria applied in the following order:

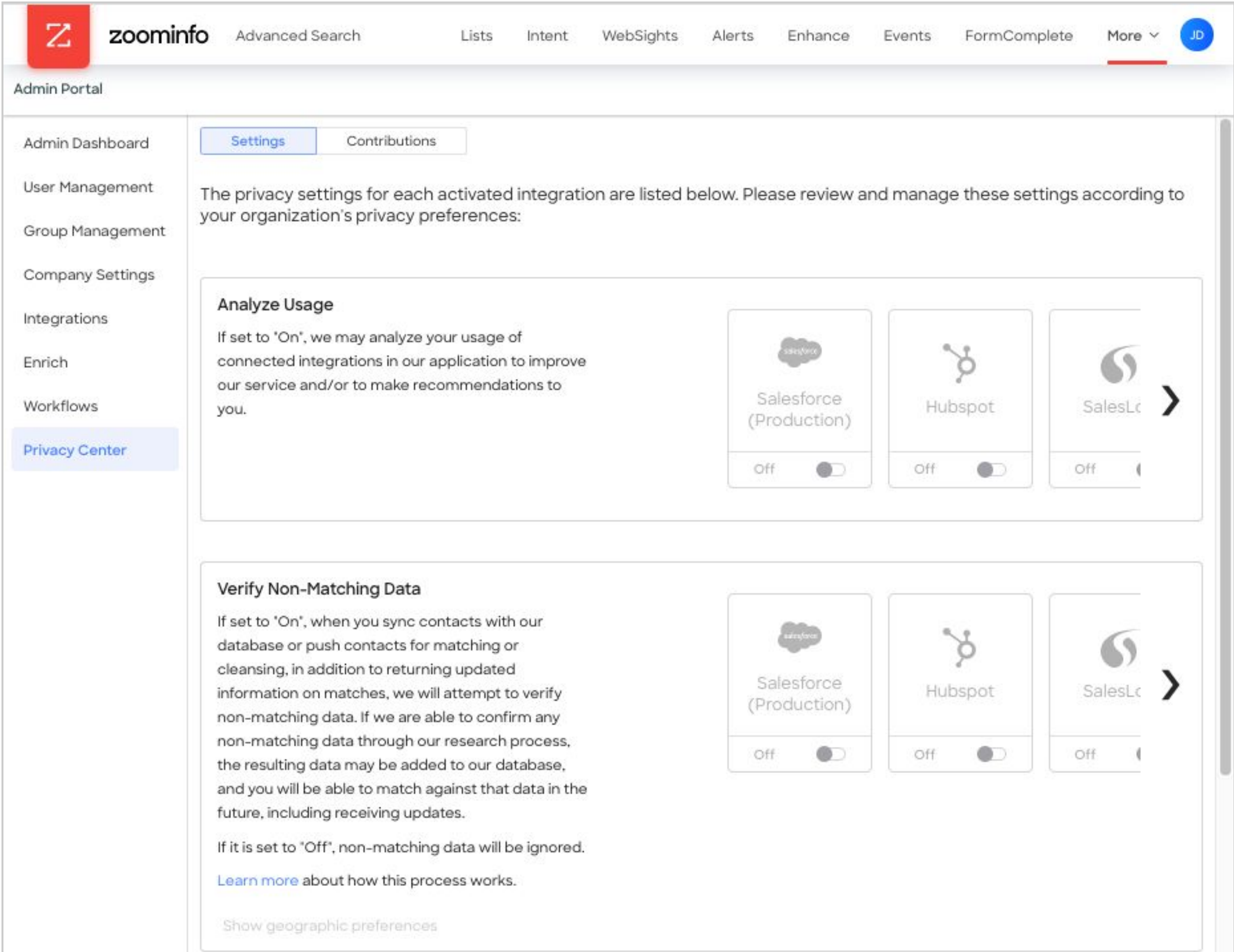
1. First Name + Last Name + Email Address
2. First Name + Last Name
3. Email Address

Privacy Center (admins only)

The Privacy Center is enabled if your organization has not contractually opted out of data sharing with ZoomInfo that is intended to analyze your use of connected integrations. Data sharing helps to improve the ZoomInfo service and/or to make recommendations to you.

1. Go to **Admin Portal > Privacy Center**.
    - If your organization has chosen to opt-out of data sharing, the following message displays:

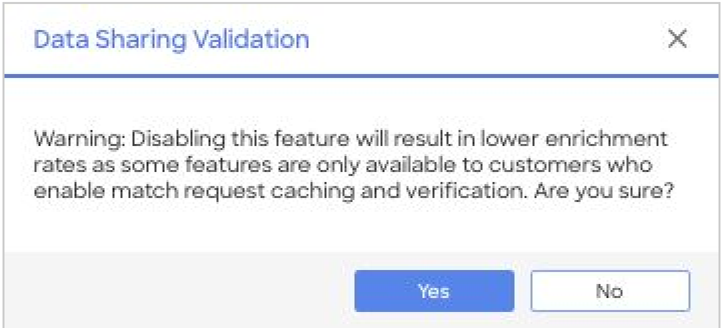
      Privacy Center has been disabled due to contractual terms. Please contact your Account Manager for assistance
    - If your organization has not opted out of data sharing, the Privacy Center page displays.



2. Review the details.

- All activated integrations will display in the **Analyze Usage** and **Verify Non-Matching Data** sections.
- Only activated CRMs will display in the **Analyze Opportunities** section.
- You can toggle any integration **On** or **Off**.

3. If you toggle any integration in the **Verify Non-Matching Data** section to **Off**, the following message displays.



4. Review the message and click **Yes** to confirm, or **No** to cancel the action.

5. Over time, Admins can review the **Data Contributions** tab to monitor the contributions made by their organization and understand the value of their participation in the Contributory Network.