



D&B Optimizer for Marketing Marketo Configuration Guide

Setup for Marketo Integrations and Connectors

VERSION: 2.8

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1. Introduction

D&B Optimizer for Marketing Connector for Marketo leverages the D&B Optimizer for Marketing product platform to match, append and cleanse leads. Enabling the integration requires steps within your Marketo instance and within your D&B Optimizer for Marketing admin account.

The purpose of this document is to walk you through the setup process for configuring a D&B Optimizer for Marketing and Marketo and two use cases:

- Marketo Connector
- Marketo Integration

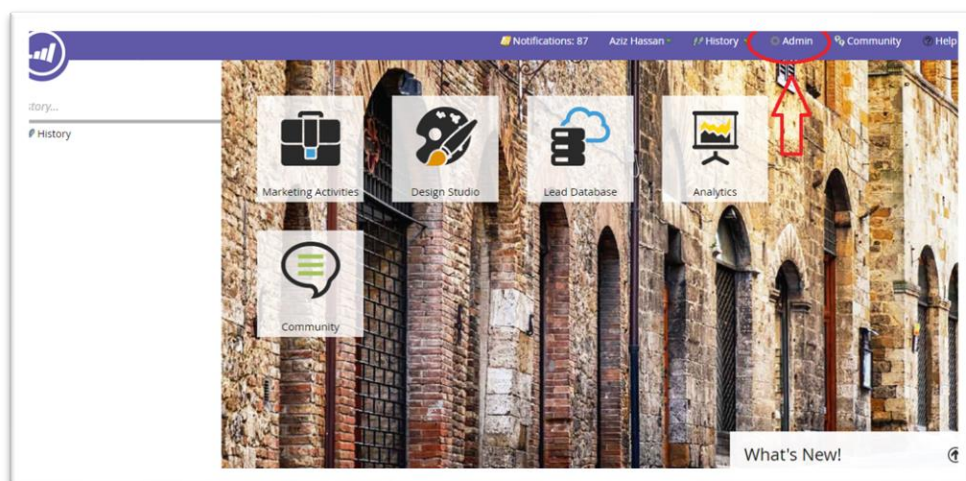
There are 3 steps in the process.

1. Getting Started in Marketo
2. Configuring Marketo Connector
3. Configuring Marketo Integration
4. Using the Marketo Connector and Integration

Approximate time to completion is 10-15 minutes. You will need full administrative access to D&B Optimizer for Marketing and Marketo in order to complete the integration.

2. Getting Started in Marketo

This section takes you through the settings required to configure Optimizer for Marketing and to work with your instance of Marketo. The configurations include creating a Marketo Role and a Marketo User. To begin, log into Marketo and go to the Admin Section.



2.1 API Access Enablement within Marketo

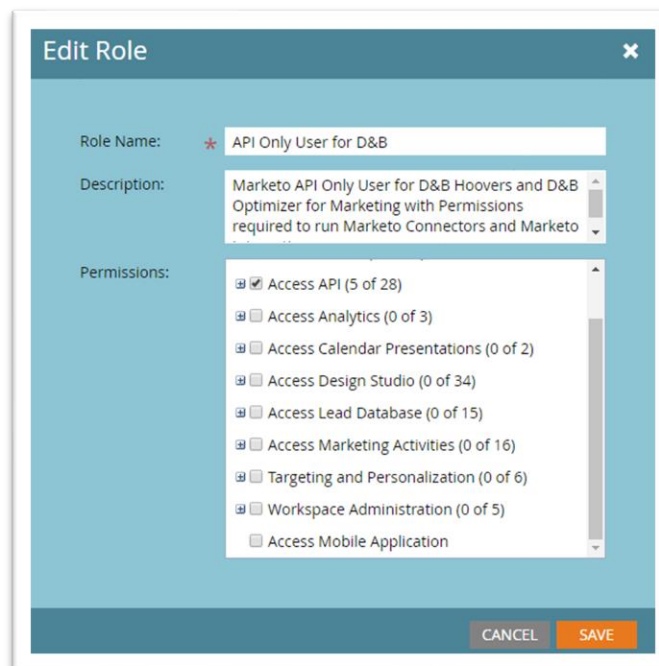
The Optimizer for Marketing Connector for Marketo leverages Marketo’s API framework. To enable it, your Marketo instance needs to have a Custom Service. A Custom Service in Marketo allows you to describe and define what data the application will have access to. You need to be logged in as a Marketo administrator to create a Custom Service and associate that service with a single API-Only user.

2.2 Create API Only Role

Only if one does not already exist, create a role that has API only access permissions by navigating to Admin>Users & Roles>Roles>New Role and create an API Only role. The permissions group required are Access API and enable as following:

Marketo Connectors: **“Read-Write Lead”** (which may also appear as **Read-Write Person**) and if using Smart Campaigns as well, also enable **“Read-Write Campaign”**.

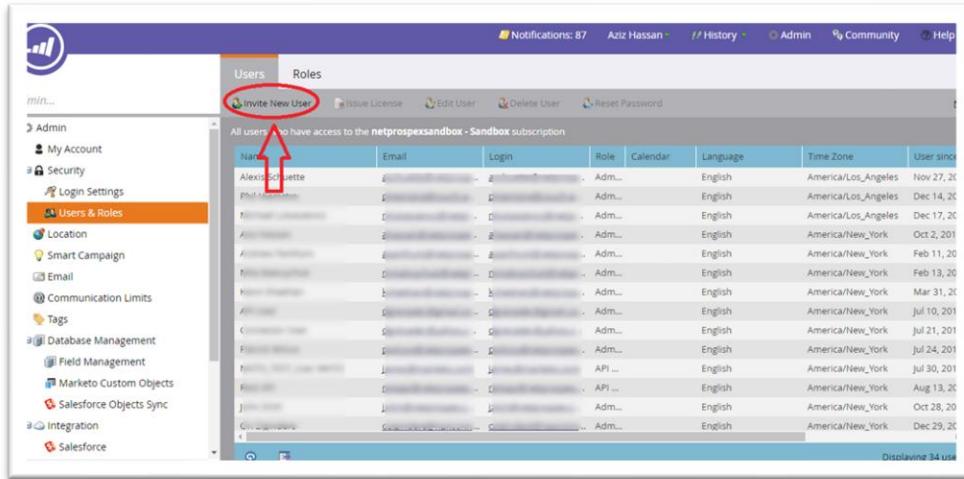
Marketo Integrations: **“Read-Write Lead”** (which may also appear as **Read-Write Person**), **“Read-Write Activity”**, **“Read-Write Activity Metadata”**



NOTE: You have the option to create and configure both Marketo Connectors and Integrations with a single Role and User. You do have the option to create one role just for the Connectors and a second role just for the Integrations.

2.3 Invite New User

1. Go to “User & Roles” and Click on “Invite New User”;



2. On the Invite New User screen, Step 1: Info, fill in the mandatory fields. Optionally change the “Access Expires” date. Select Next .

The screenshot shows the 'Invite New User' form in a modal window. The form has a progress indicator at the top with three steps: 'Step 1: Info' (active), 'Step 2: Permissions', and 'Step 3: Message'. The form fields are as follows:

- Email:** RestAPI@dnb.com
- First Name:** Rest
- Last Name:** API
- Reason:** Reason is optional.
- Access Expires:** Never

At the bottom right of the form, there are two buttons: 'CANCEL' and 'NEXT' (highlighted in orange).

3. On Step 2: Permissions, under Roles, select “API-Only” AND for API Only: select the Checkbox. Select Next

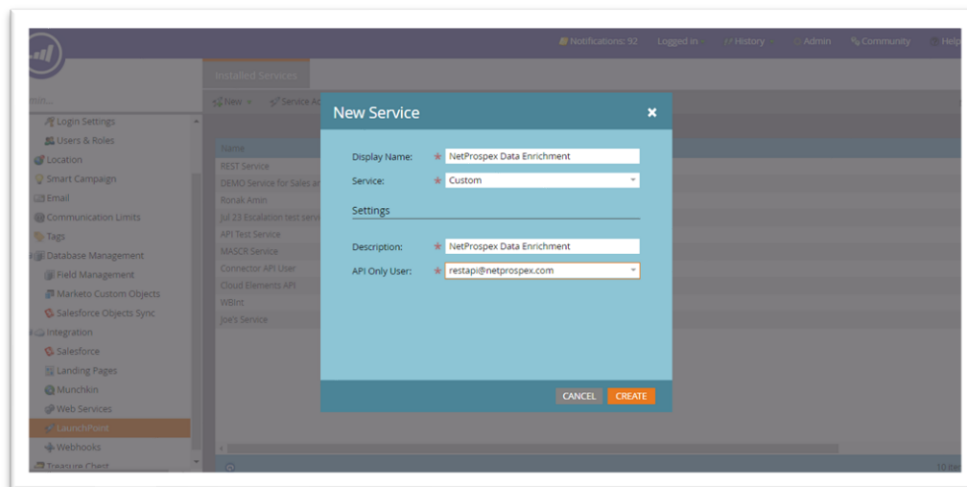
The screenshot shows the 'Invite New User' dialog box with a progress bar at the top indicating 'Step 2: Permissions' is active. Below the progress bar, the 'Roles' section has a dropdown menu open, listing several roles: Admin, Analytics User, API Only User for D&B (which is highlighted in orange and has a checkmark), API Role, API role with ABM, and API-Only. Below the roles list, the 'API Only' checkbox is checked. At the bottom right, there are three buttons: 'CANCEL', 'BACK', and 'NEXT' (which is highlighted in orange).

4. On Step 3: Message, an message invitation is not required for API Only users. Select Send.

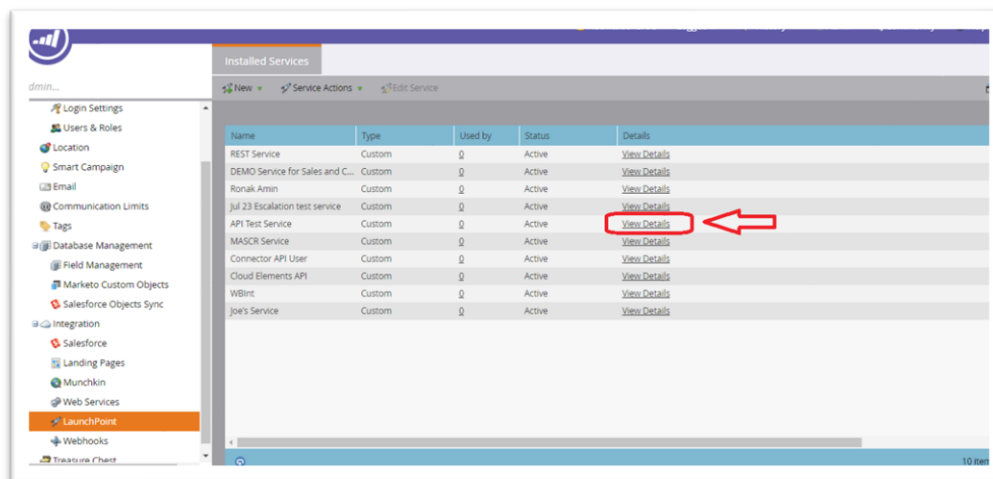
The screenshot shows the 'Invite New User' dialog box with the progress bar indicating 'Step 3: Message' is active. The main area of the dialog is mostly empty, with the text 'An invitation is not required for API only' displayed. At the bottom right, there are three buttons: 'CANCEL', 'BACK', and 'SEND' (which is highlighted in orange).

2.4 Create New Service in Marketo

1. On the left navigation, go to **Integration** and then the **LaunchPoint** section;
2. Click the “New” drop down and choose “New Service”;
3. On the New Service screen, enter a “Display Name”;
4. For Services, select “Custom” from drop down;
5. Under Settings on the same screen, enter a Description.
6. Under API Only User, choose the API Only User you created earlier and select Create.



7. Once the New Service has been created, the Installed Services screen is displayed.



8. Select “View Details” of the LaunchPoint service just created and copy the both “**Client Id**” and “**Client Secret**”. You will need to paste this into Optimizer for Marketing in an upcoming step.

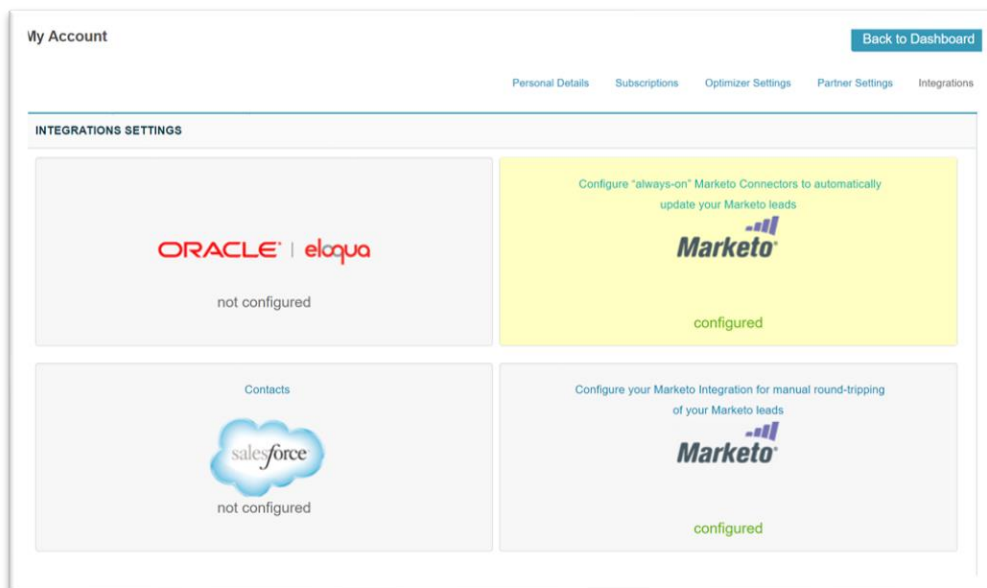
Marketo Leads DB. When configured, any web form submission or change to one or more records in the Marketo Campaign will trigger the Marketo Web Hook that will automatically match, append and enrich the record(s) that changed.

NOTE: If you plan to utilize both the Always-On Connector and the Manual Connector, they both must use the same instance of Marketo.

3.1 Configuring Always-on Marketo Connectors

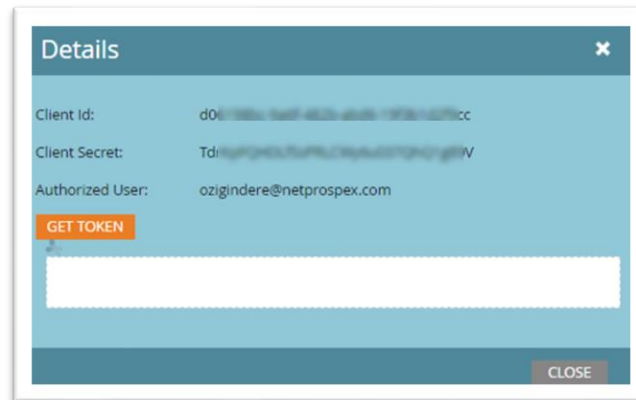
To configure your “always-on” connectors, you need to configure your Marketo Connector within Optimizer for Marketing which entails entering credentials, configuring Input Mappings and configuring Enrichment Mappings.

1. Log into Optimizer for Marketing and Click on your user name on the top right. Optionally, if this is your first time in Optimizer for Marketing, Save your Personal Details
2. Go to “Integrations” and Click on “Marketo Connector”

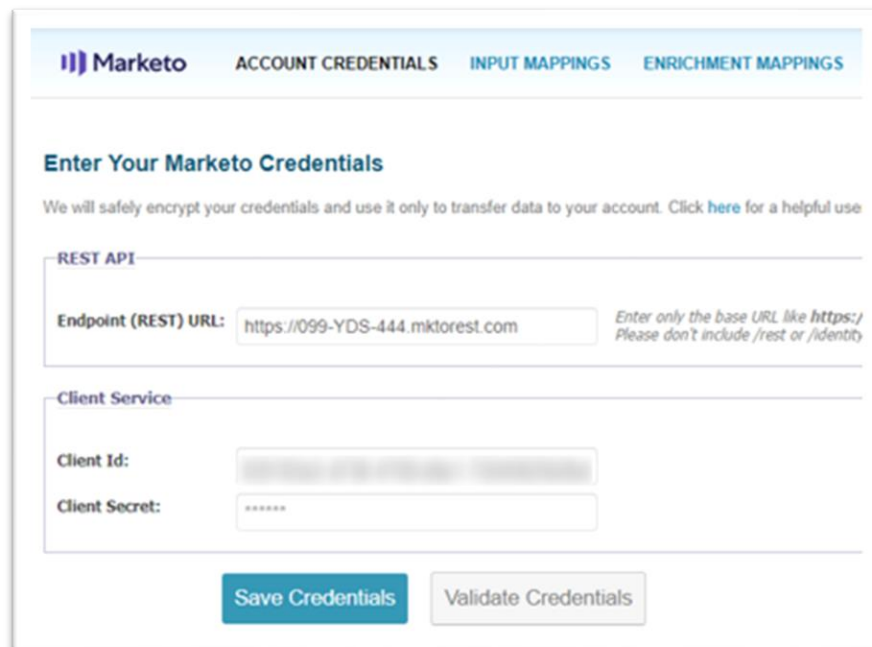


3. Paste the “Rest API Endpoint” copied from Marketo Web Services into the “Endpoint” box but you MUST remove the /rest portion. So it should look like this: <https://099-YDS-444.mktoreset.com>.

- Paste the “Client Id” and “Client Secret” information from the Marketo details screen for the **LaunchPoint** Service you created and associated with the API-only user. It looks like this.



- Select “Save Credentials” and move to “Input Mappings”
NOTE: Saving credentials automatically validates your credentials.



3.2 Configuring Marketo Connector Input Mappings

After your Marketo and Optimizer for Marketing accounts are linked, input mappings need to be configured in Optimizer for Marketing. Input Mappings determine which Marketo fields will be used when attempting a match of your Marketo records.

1. In the integration settings select “Input Mappings”
2. Using the dropdown menus in the right column, select the appropriate Marketo fields that should be considered when D&B attempts a match. Map as many fields as possible/applicable to your Marketo data
3. When satisfied with the mappings, click “Save”

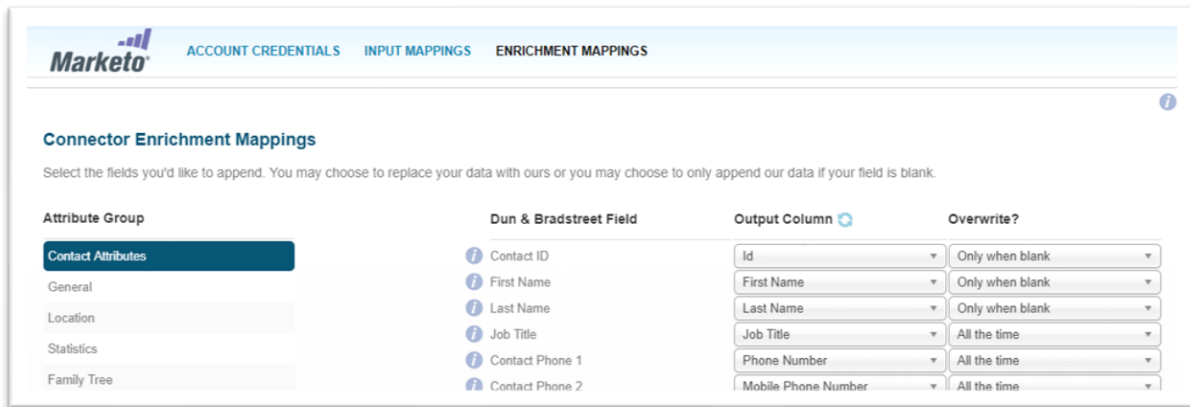
Dun & Bradstreet Input Field	Marketo Value
Email Address *	Email Address x v
First Name	First Name x v
Last Name	Last Name x v
Job Title	Job Title x v
Job Hierarchy	Choose Mapping v
Job Title Function	Role x v
Contact Phone Number	Phone Number x v
Company Phone Number	Main Phone x v
Company Name	Company Name x v

3.3 Configuring Marketo Connector Enrichment Mappings

After your Marketo and Optimizer for Marketing accounts are linked, “Enrichment Mappings” need to be configured in Optimizer for Marketing. Enrichment Mappings determine which Marketo fields will be appended with data that is returned as a result of the D&B Optimizer Match.

1. In the integration settings select “Enrichment Mappings”
2. Using the dropdown menus in the right column, select the appropriate Marketo fields that should be considered when D&B finds a match and is going to update the record in your instance of Marketo. Map as many fields as possible/applicable to your data and business rules.
3. Note there are multiple attribute groups on the left side with fields in each attribute group to map.

4. When satisfied with the mappings, click “Save”

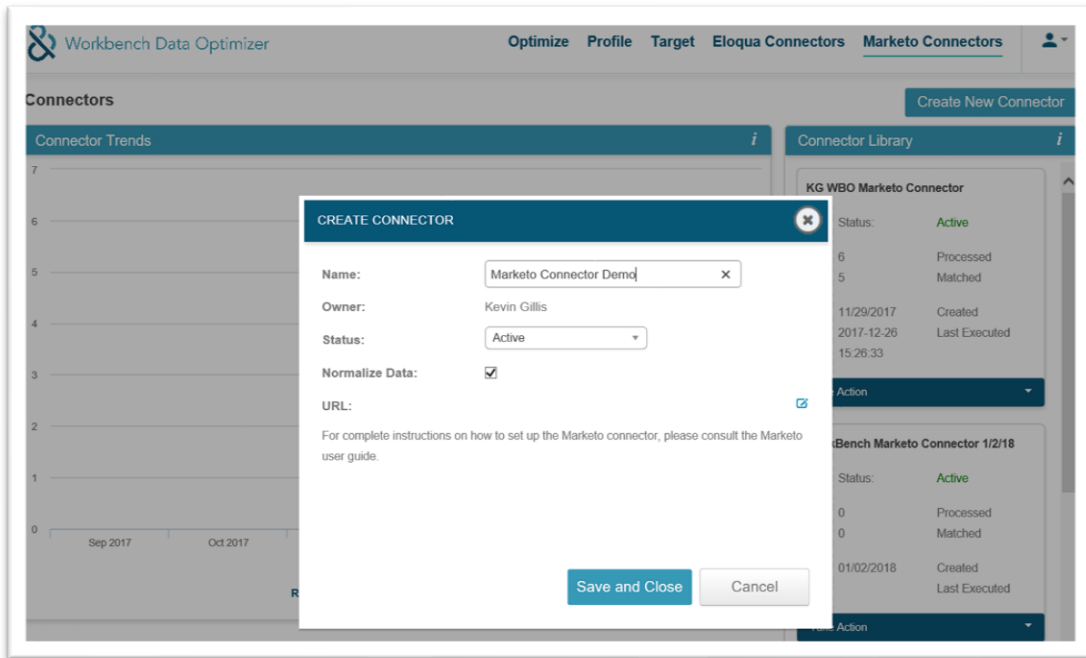


3.4 Creating a Marketo Connector

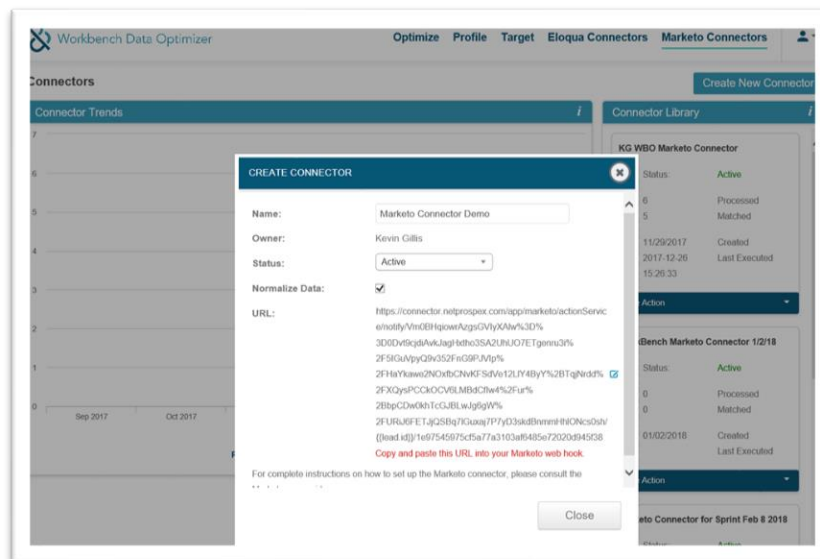
1. Click on “Marketo Connectors” in the top navigation bar.
2. Click “Create New Connector”



3. On the CREATE CONNECTOR screen, enter the Name for the Marketo Connector and select the “Normalize Data” checkbox to enable.
4. Select “Save and Close” button.



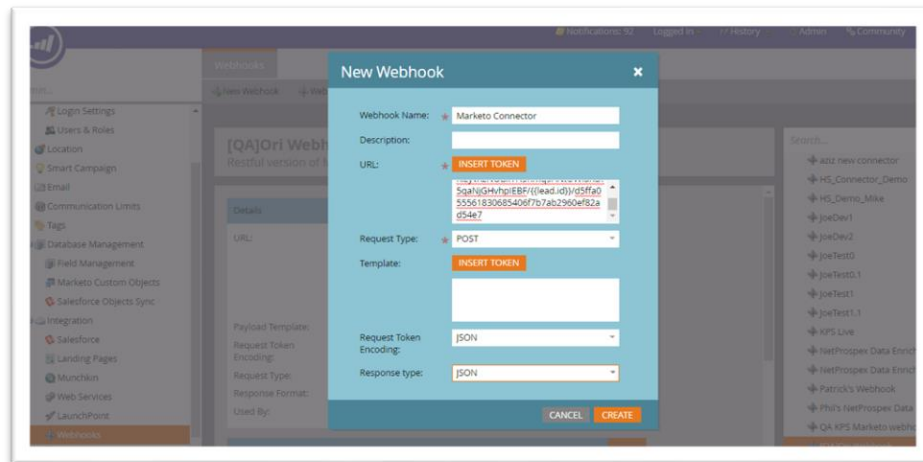
5. Once saved, the CREATE CONNECTOR screen will refresh and automatically generate the URL (can be quite long) that you next have to paste into your Marketo Webhook in the Marketo application.
6. Copy the URL and click “Close”. This URL must be pasted into your Marketo Webhook which is covered in the Marketo Webhook section.



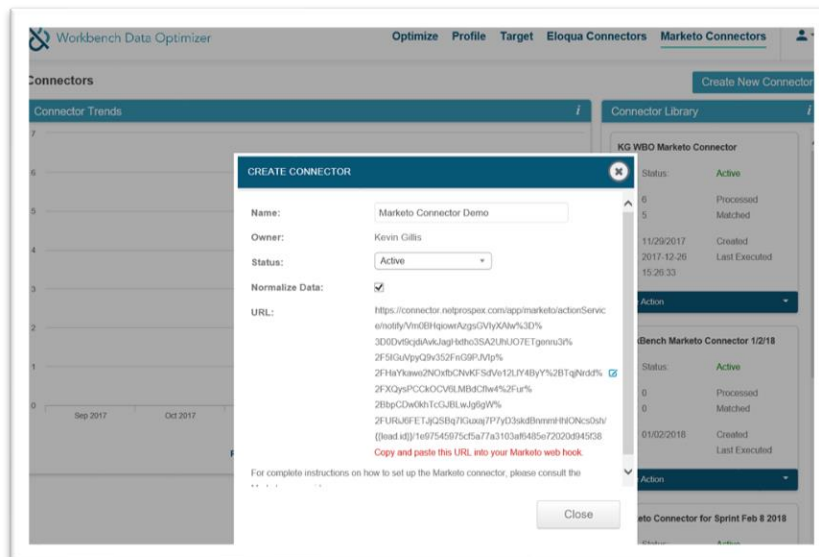
3.5 Setting up a Webhook in Marketo for the Marketo Connector

The last step is to configure your Marketo Webhook which configures the Connector to always fire when there is activity on your Marketo webform or Marketo Static Leads List.

1. Go to the Admin section in Marketo;
2. Click on Webhooks and select “New Webhook”.
3. Label the “Webhook Name” anything you’d like.
4. Paste the URL you copied from CREAT CONNECTOR screen in Optimizer for Marketing into the “URL” box.



Reminder: The URL from Optimizer for Marketo should be copied from this dialog box.



5. Leave the first drop down as “Post”
6. Change the last two drop downs as “JSON”
7. Click “Create”

3.6 Publish the Marketo WebHook web form

There are two steps required.

1. Create and publish your Marketo Webform

The screenshot shows a web form interface with a purple header bar containing a bar chart icon and the text "my-test-program.my-sample-form". On the left, a vertical sidebar contains three numbered steps: "1 Field Details" (highlighted in blue), "2 Form Settings", and "3 Finish". The main content area is titled "Field Details" and contains several input fields: "DUNS:", "Company Name:", "Company Address:", "Company City", "Company State:", "Company Country:", and "Company Zip5:". A green "Submit" button is located at the bottom right of the form.

2. Configure the Flow for your Always-On Marketo Form to trigger the Marketo Webhook that you previously configured whenever a form is submitted.

The screenshot displays the Marketo configuration interface for a web form. At the top, there are tabs for "Marketo Always-On Web Form - Optimize...", "Smart List", "Flow" (which is selected), "Schedule", and "Results". Below the tabs, there are several icons and text: "New", "Campaign Actions", and "View Campaign Members". There are also "Collapse All" and "Expand All" options. The main area shows a step titled "1 - Call Webhook" with a plus icon on the left and a close icon on the right. Below this step, there is a dropdown menu labeled "Webhook:" with the selected option being "Optimizer for Marketing Marketo Webhook". An "Add Choice" button is visible to the right of the dropdown.

- Any time a form is submitted, the webhook will trigger which sends the records to Optimizer for Marketing to be mapped for matching and then written back to Marketo based on your Enrichment Settings.

The screenshot shows the 'D&B Optimizer' interface. The top navigation bar includes 'Notifications: 9', 'Kevin Gillis', 'History', and 'Admin'. The main content area is titled 'Lead Database...' and has tabs for 'All Leads', 'Leads', and 'Smart List'. Below the tabs are buttons for 'New', 'List Actions', 'Lead Actions', 'Delete Lead', and 'Select All'. A sidebar on the left lists 'Lead Database', 'Field Organizer', 'System Smart Lists', 'All Leads' (highlighted), 'Unsubscribed Leads', and 'Marketing Suspended'. The main table displays lead records with the following data:

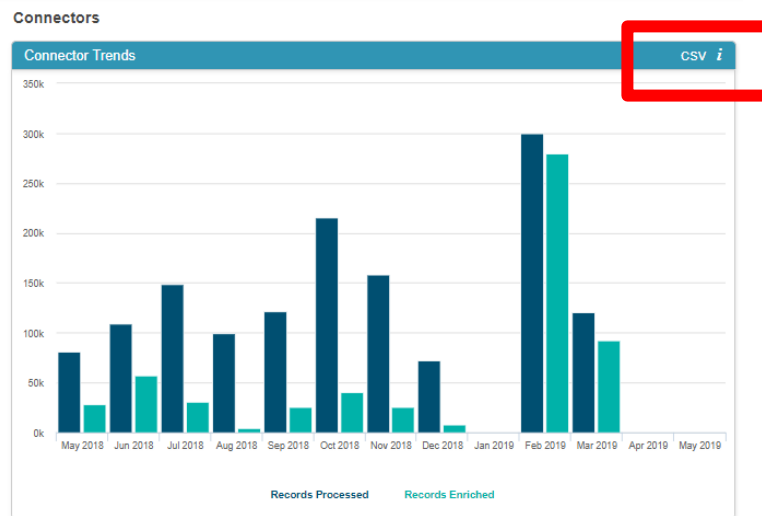
Id	Updated	Last	First	Job Title	Company	Email	Phone	Lead Status
683849	Jan 23, 2019 2:47 PM	Rains	Paul	President	Dignity Heal...	paul.rains@...	(209) 461-2...	WB-Enriche
6055	Jan 23, 2019 7:41 AM	Chapple	Louisa	Human Res...	Barclays Ca...	louisa.chap...	212-412-3564	WB-Enriche
683848	Jan 23, 2019 7:21 AM	millier	Grant	Vice Preside...	Fidelity	grant.miller...	(904) 854-8...	WB-Enriche
292676	Jan 23, 2019 7:10 AM	Cook	Tim	Ceo	Apple	tcook@appl...	(408) 996-1...	WB-Enriche

The Always-On Connector for Optimizer for Marketing and Marketo is now configured!
 The Dun & Bradstreet Webhook is now configured in your Marketo instance for use in Webforms and Campaigns using Static Lists.

3.7 Marketo Connector Activity Data

Once your webhook is configured and your Marketo Connector processing records, there are two ways to access activity data.

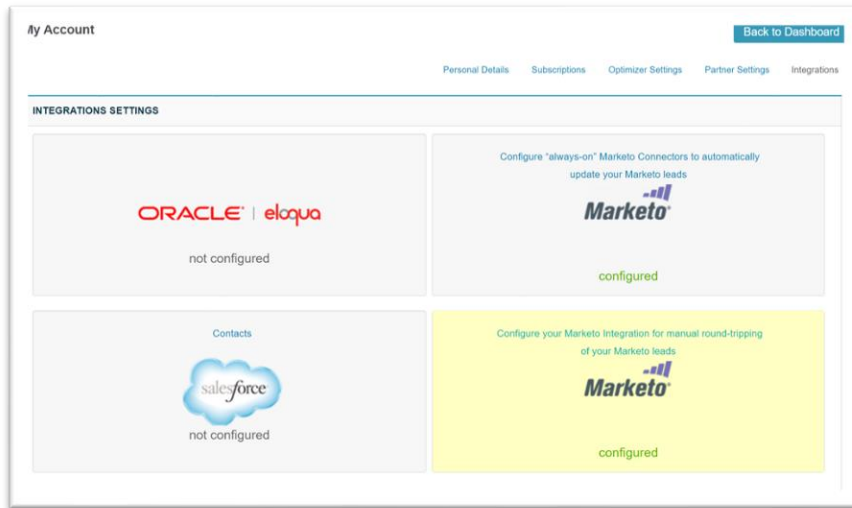
1. The first is the monthly usage graph which displays Records Processed and Records Enriched. The graph shows the current month and up to the previous and consecutive 12 calendar months, for a maximum of 13 consecutive calendar months. Months with no activity will still be displayed to maintain continuity with your reporting.
2. The second capability is one-click downloading of the usage graphs. The data will be formatted into columns and in CSV format.



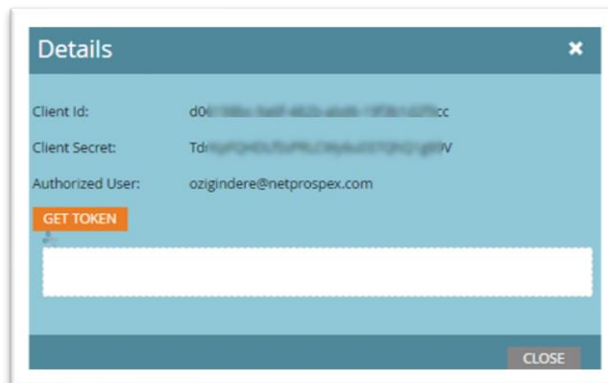
4. Configuring Manual Marketo Integrations in Optimizer for Marketing

Integrations allow your users to use Optimizer for Marketing to import Marketo Lists (of contacts/leads) contained in Marketo Campaigns from within the Optimizer for Marketing interface. Once imported, all leads on the list will be optimized and the user will have the option to preview and send the optimized leads directly back to Marketo. This is sometimes referred to as “Manual Round-Tripping”.

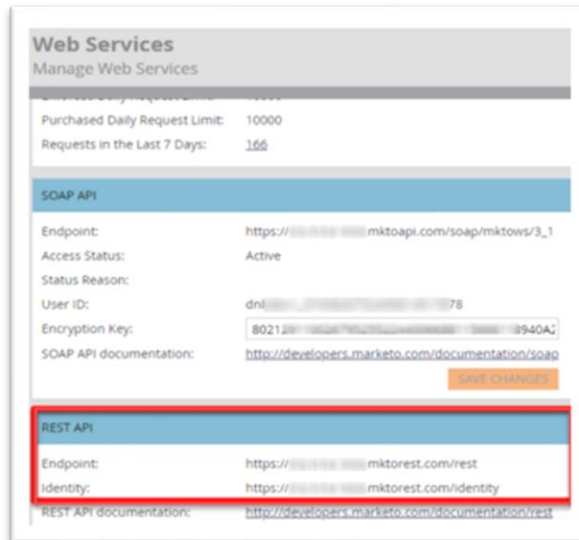
For Integrations, four credentials fields are required, all of which must be copied from Marketo. The four fields are the “Client ID”, “Client Secret”, “Endpoint (REST) URL” and “Identity (URL)”.



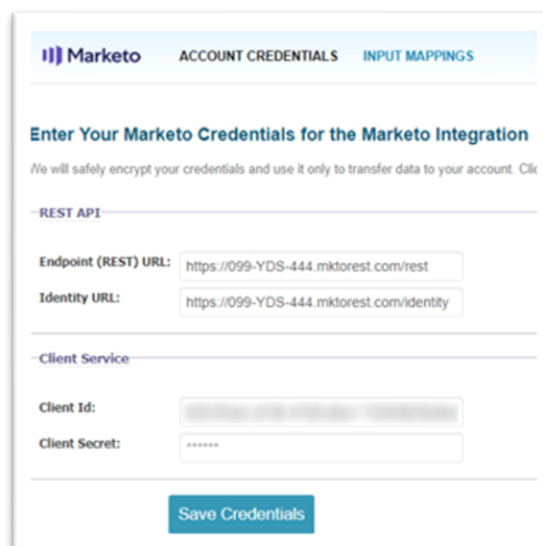
1. The first two fields, "Client Id" and "Client Secret" can be copied from the Marketo details screen for the **LaunchPoint > Installed Services** you created and associated with the API-only user . It looks like this.



- The last two fields, “Endpoint (REST) URL” and the “Identity URL”, are both copied from the **REST API** section on the **Web Services** page in Marketo. They should look like this: <https://099-YDS-444.mktorest.com/rest> and 099-YDS-444.mktorest.com/identity.



- Copy/Paste the four snippets into the Marketo “Account Credentials” page and select “Save Credentials”.
- For the REST Endpoint, copy <https://099-YDS-444.mktorest.com/rest> (**Unlike the Always-On Connector, you DO NEED to include the /rest**).
- Enter the full “Identity” URL from the same REST API section. It will look like this: <https://099-YDS-444.mktorest.com/identity>.

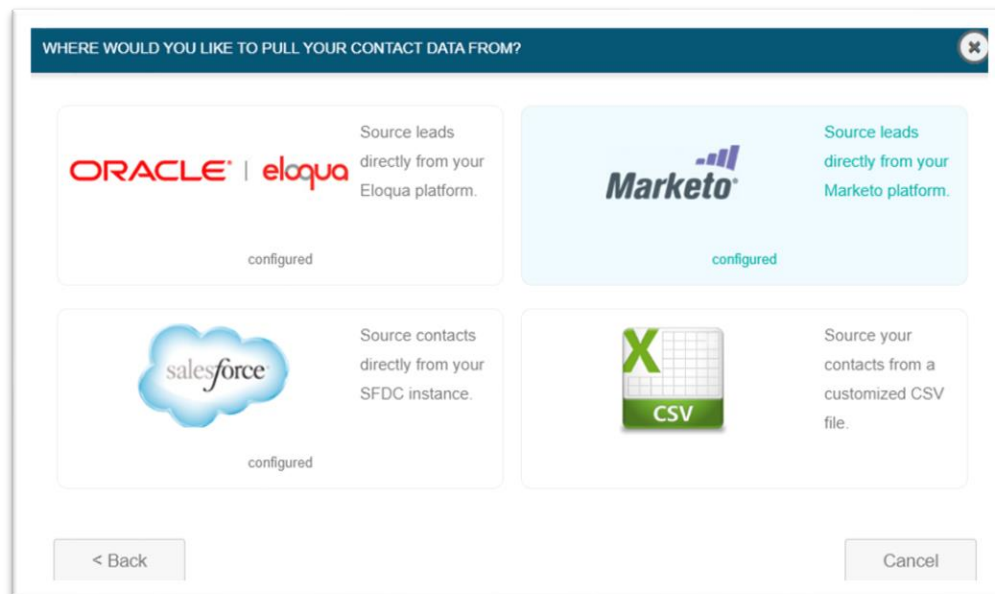


6. Configure your INPUT MAPPINGS. The Marketo Connector will automatically build a list of ALL fields in the Marketo database which you can use to set what fields are used as inputs to the Contact matching process.

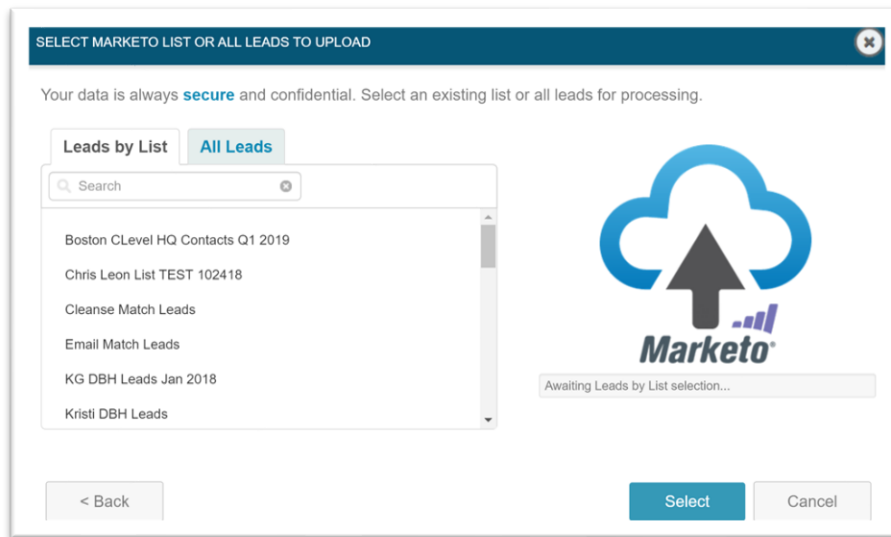
4.1 Importing Marketo Integration Leads into Optimizer for Marketing

Using the Marketo integration is very similar to Optimizing any data source in Optimizer for Marketing. To Optimize your Marketo leads:

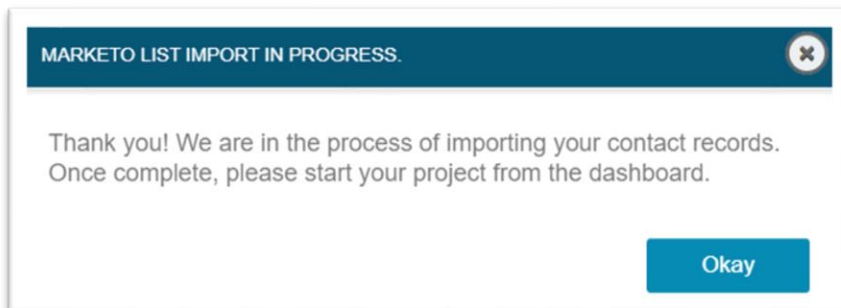
1. Navigate to the Optimize tab of Optimizer for Marketing
2. Click “Upload Data”
3. Select “Contact Data”
4. Select the Marketo tile Note: It should say “configured” if the process has been completed successfully. If it does not say “configured”, configure the Marketo Credentials in the User Name (top right corner of UI) > Integrations > Marketo > Enter Your Market Credentials.



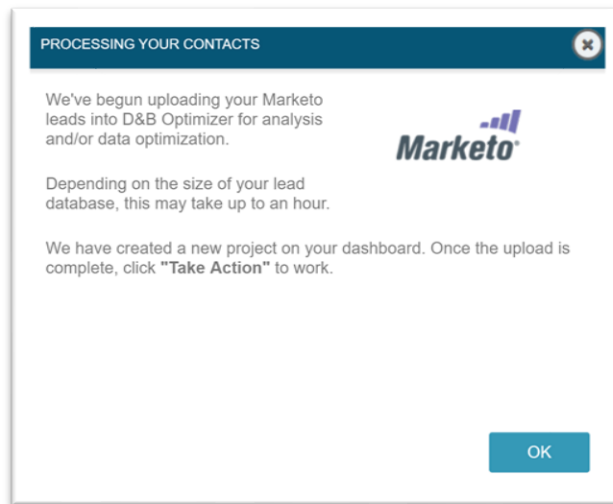
5. Select the Marketo “Lead by List” or select “All Leads” pull into the Optimizer for Marketing for processing.



6. There will be a notice that your Marketo contact records are being imported into Optimizer for Marketing.



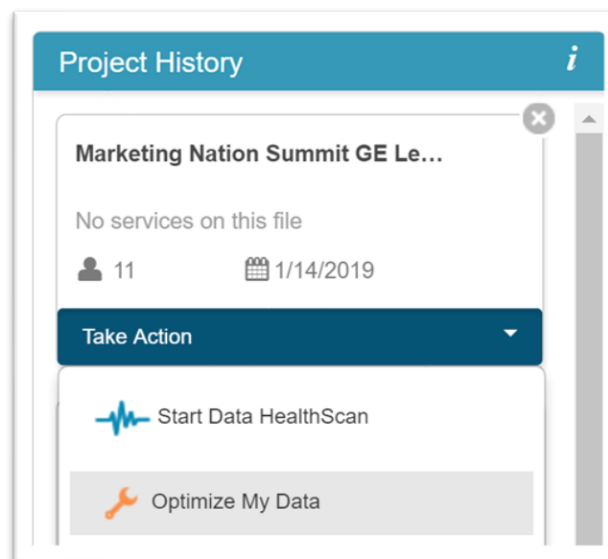
7. There will be a notice stating how many leads are within your Marketo and these leads will begin importing to Optimizer for Marketing. Click "OK" to dismiss the notice.



4.2 Optimizing Leads using the Marketo Integration

Once imported, Marketo leads will appear as a list in the “Project History” panel of the Optimize tab. To continue the process:

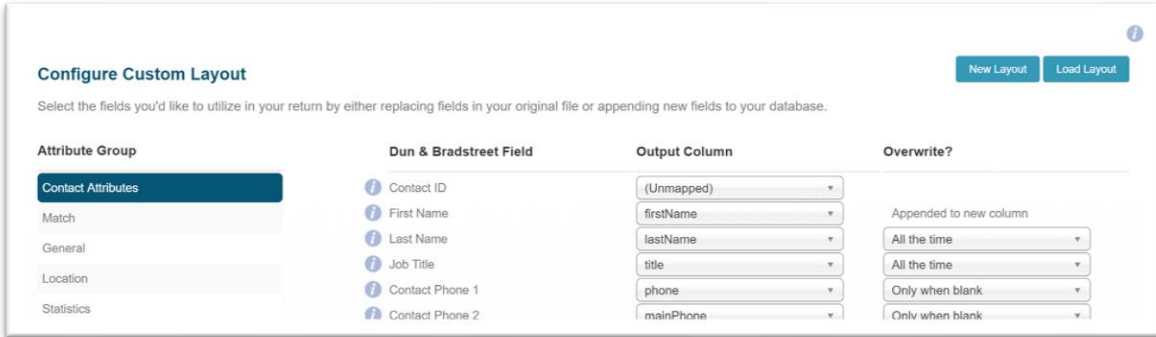
1. Click “Take Action” on the Marketo Contact list and select “Optimize My Data.” (Note: At this point, a Data Health Scan can also be run)



2. Configure Contact Optimizer settings as you would for any other file
3. On the next page, there will be a prompt to configure a custom layout. In this section, select where each D&B data attribute (Dun & Bradstreet Field) should be written on the

Marketo Contact (Output Column.) You can also determine the writing behavior (Either overwrite or write only when blank) in the far right column.

- o **NOTE:** Only the mapped attributes in the “Output Column” will be published back to the Marketo Leads. When satisfied, click “Start Contact Optimizer”

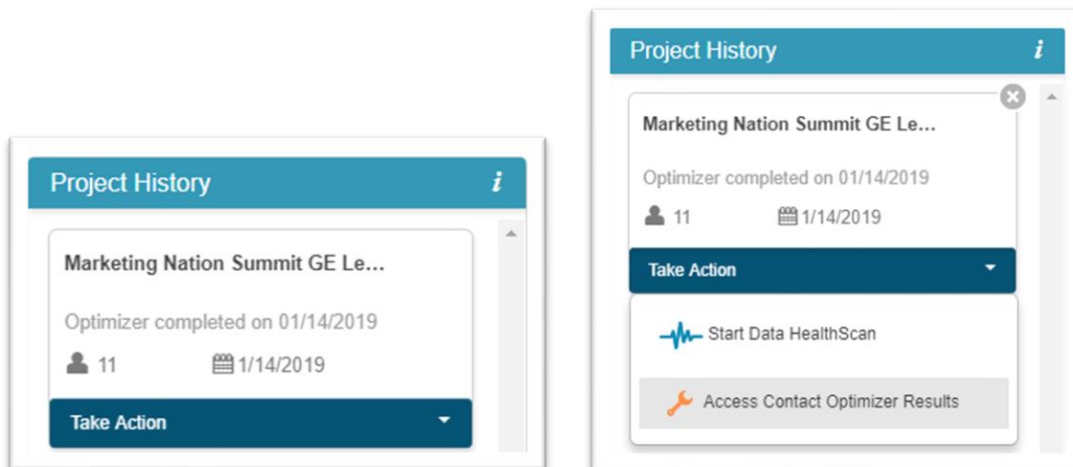


4. You’ll be returned to the Optimize dashboard as contact optimization is performed on your file and will receive an email confirmation when the optimization is complete.

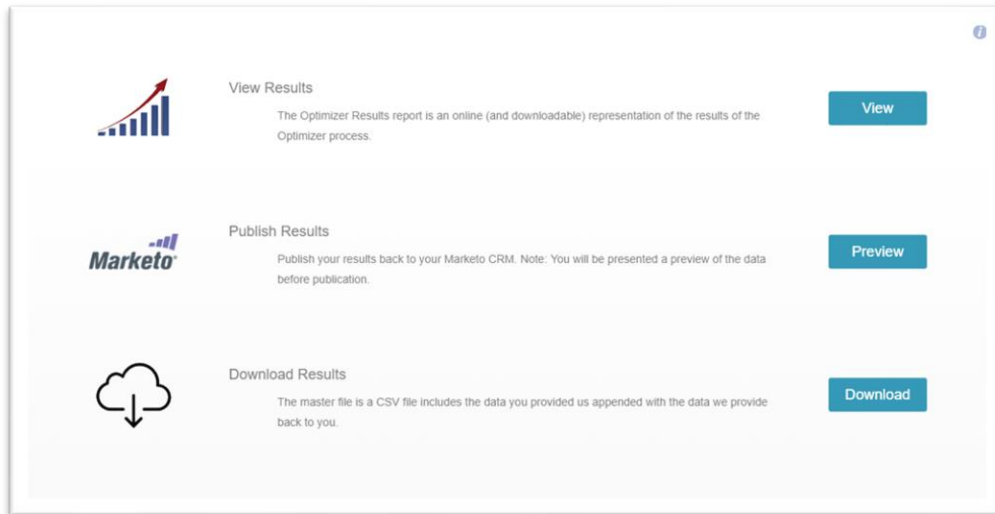
4.3 Publishing Marketo Integration Leads back to Marketo

The project status will be updated once the Contact Optimizer has completed. Once complete, the optimized leads can be updated in Marketo by doing the following:

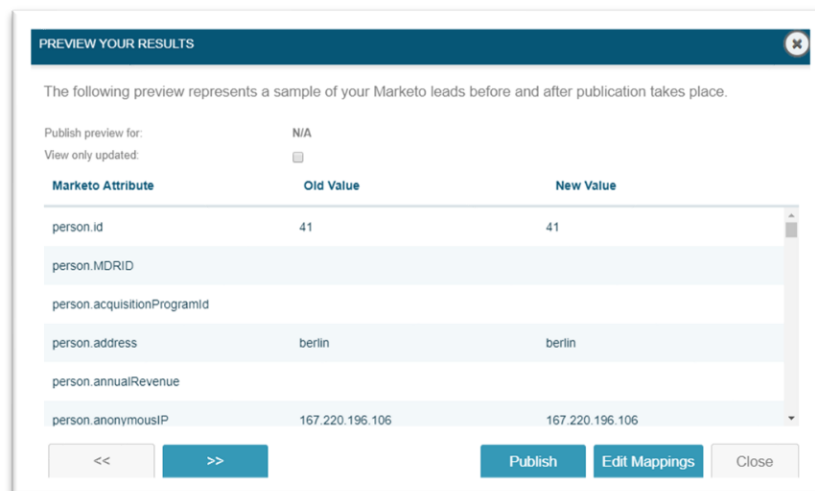
1. From the “Project History” panel, click “Take Action” and select “Access Contact Optimizer Results.”



- The following screen allows access to an Optimization report, the ability to publish results or a raw excel file download. Select the middle option, "Preview"



- A modal will display the results of the Contact Optimization in comparison to the original data. Any rows containing changes will highlighted. There will be 5 preview examples.



- If not satisfied with the way the data is being written from D&B to Marketo, the field mapping can be quickly updated by selecting "Edit Mappings." Otherwise, hitting "Publish" will push all the changes back to Marketo.

The following preview represents a sample of your Marketo leads before and after publication takes place.

Publish preview for: gillisk@dnb.com
 View only updated:

Marketo Attribute	Old Value	New Value
person.id	102951	102951
person.phone		(973) 921-5500
person.postalCode	02420	024512189

TIP: To speed up the review process before publishing back to Marketo, select the “View only updated” checkbox to see only the fields where D&B has found updates that will be written to your Marketo instance.

- All Marketo leads are pushed back to Marketo and records updated based on your Enrichment Mappings.

D&B Optimizer interface showing a list of leads. The table below represents the data visible in the screenshot.

Id	Updated	Last	First	Job Title	Company	Email	Phone	Lead Status
683849	Jan 23, 2019 2:47 PM	Rains	Paul	President	Dignity Heal...	paul.rains@...	(209) 461-2...	WB-Enriche
6055	Jan 23, 2019 7:41 AM	Chapple	Louisa	Human Res...	Barclays Ca...	louisa.chap...	212-412-3564	WB-Enriche
683848	Jan 23, 2019 7:21 AM	milller	Grant	Vice Preside...	Fidelity	grant.miller...	(904) 854-8...	WB-Enriche
292676	Jan 23, 2019 7:10 AM	Cook	Tim	Ceo	Apple	tcCook@appl...	(408) 996-1...	WB-Enriche