

Marketo Integration Guide

For administrators setting up the ZoomInfo integration with Marketo

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Configure Marketo

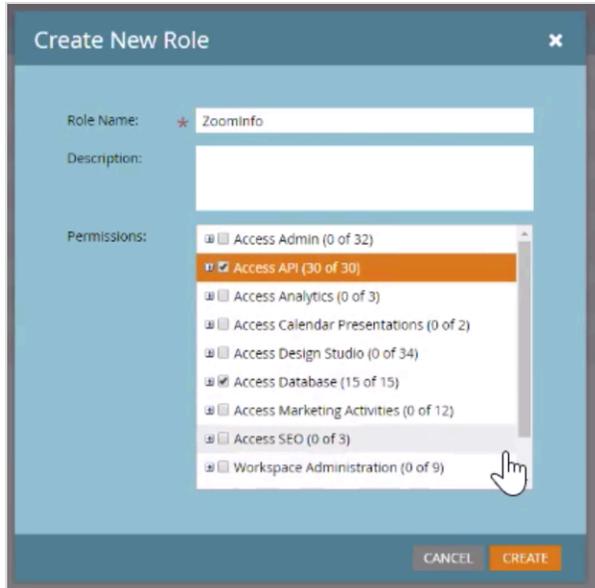
ZoomInfo integrates with Marketo using its REST API. To support the integration, you must configure an API Only role and API Only user that you link to a custom LaunchPoint service.

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 topic, [Create a Custom Service for Use with REST API](#) for additional details.

Create an API Only Role

In the Create New Role dialog box, create a new role and add required permissions.

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 Campaign, Execute Campaign ¹ , Read-Only Assets, Read-Write Person or Read-Write Lead, Access Database: Create List, Advanced List Import or Import List



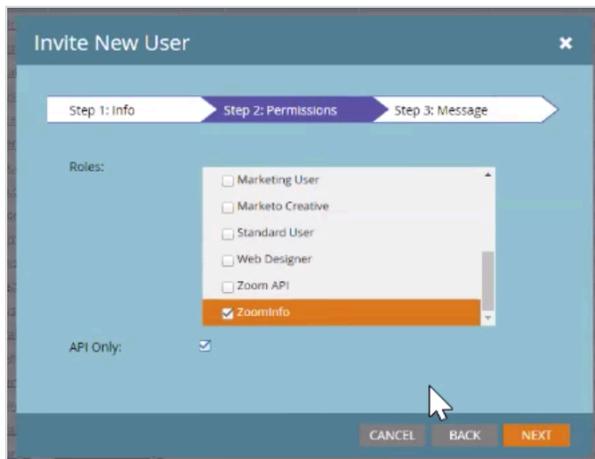
See the Marketo documentation topic, [Managing User Roles and Permissions](#) for details.

¹ Required in order to add contacts from ZoomInfo to Marketo Smart Campaigns

Create an API Only User

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

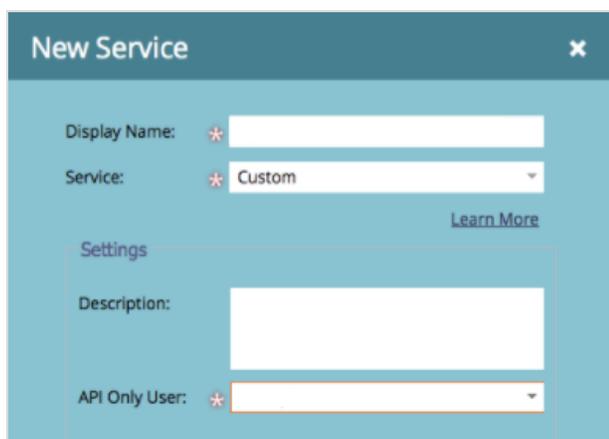
Field	Description
Email	This email address is required to create the user, but will not receive email. (e.g., <i>zoominfo.integration@zoominfo.com</i>)
First Name	ZoomInfo
Last Name	Integration
Roles	Select the API Only role you created earlier (e.g., <i>ZoomInfo API Only</i>)
API Only	Check the API 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., <i>ZoomInfo Integration</i>)
Service	Select Custom
Description	Type a description (e.g., <i>ZoomInfo Integration</i>)
API Only User	Select the API Only user created earlier (e.g., <i>zoominfo.integration@zoominfo.com</i>)

Marketo Credentials

ZoomInfo admins and users will connect to Marketo using:

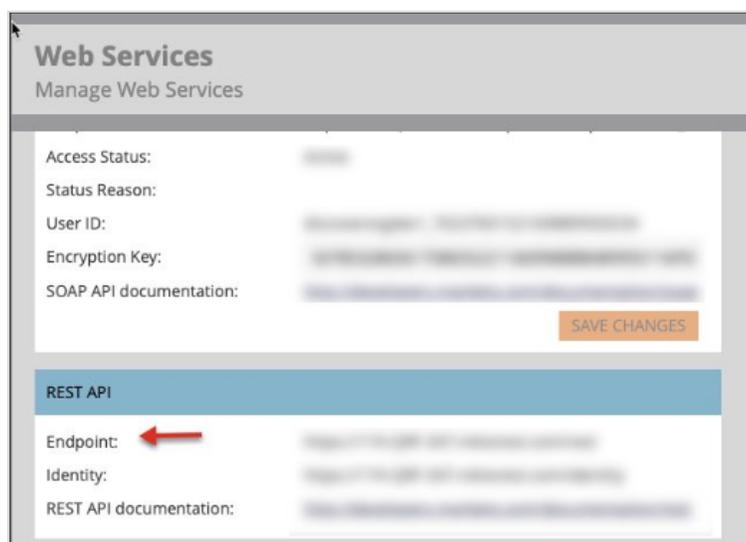
- **Client ID** and **Client Secret**
- **Instance URL**

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 and 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
3. Copy and paste the **Instance URL** (for example, to Notepad) for use when configuring the connection.



For general information about API access, see the Marketo documentation topic, [Create a Custom Service for Use with REST API](#).

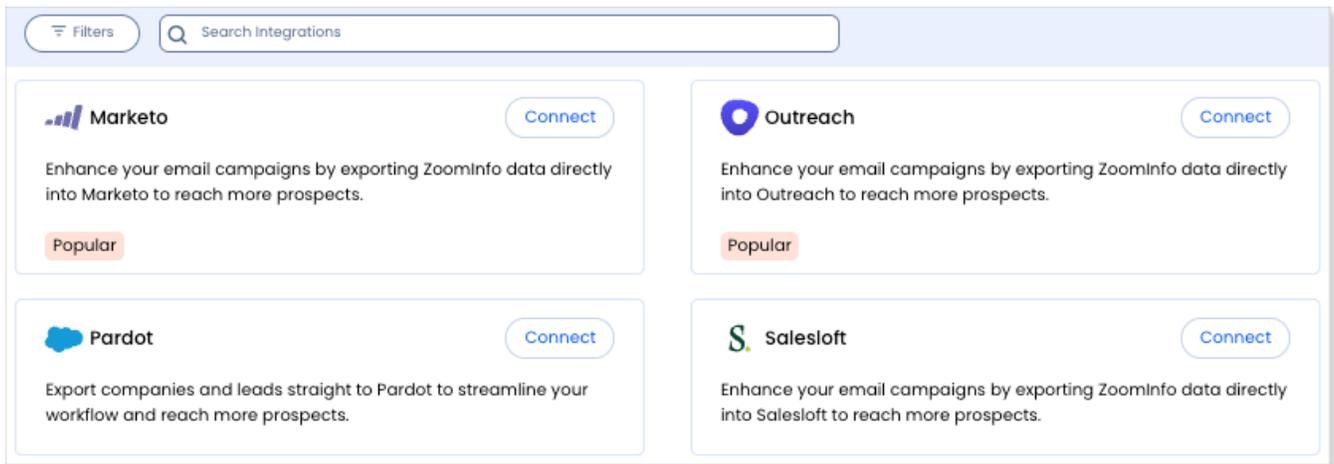
Get Connected

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

To establish the connection between ZoomInfo and your Marketo environment, you must be a Super Admin in Marketo or have your Marketo Admin first enable permissions within Marketo.

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 > Connections**.



2. Use the **Filters**, or **Search integrations** options to find your integration.
3. On the tile for your integration, click **Connect**.
4. Log in with your credentials.
5. Provide the **Instance URL**, **Client ID** and **Client Secret**.

A success message displays.

Connect to Marketo

Connect Your Marketo Account

Export records info directly to Marketo.com

Instance Url:

Client Id:

Client Secret:

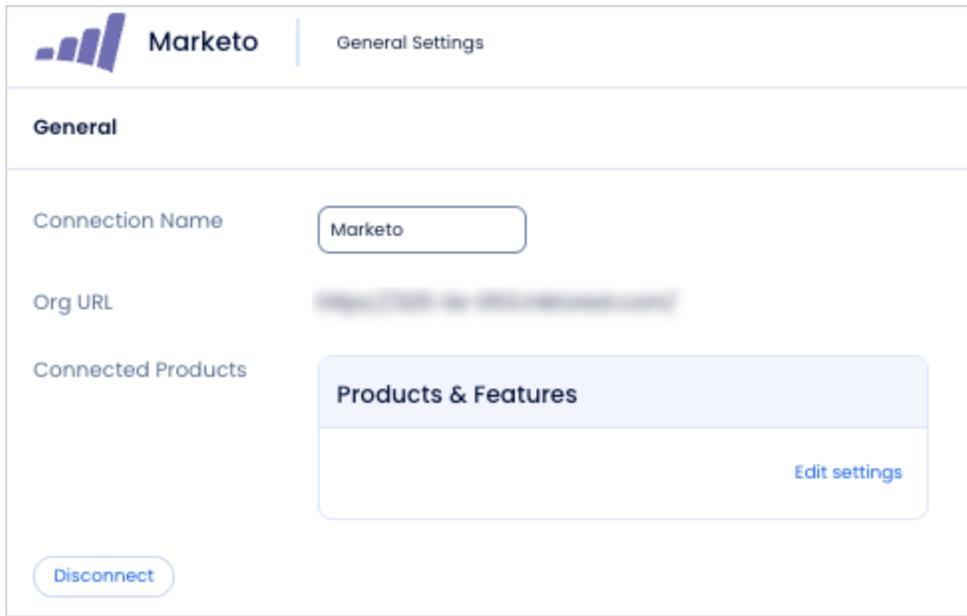
Connect Marketo Cancel

Configure Integration Settings

Once your integration is connected, you can configure the settings, including export preferences, mapping, and filtering:

To access the **Settings** page for your integration:

- Click **Edit Settings** from the connection success message.
- If you've already closed the connection success message, navigate to the **Connected** tab and click ... > **Settings** in the **Action** column.

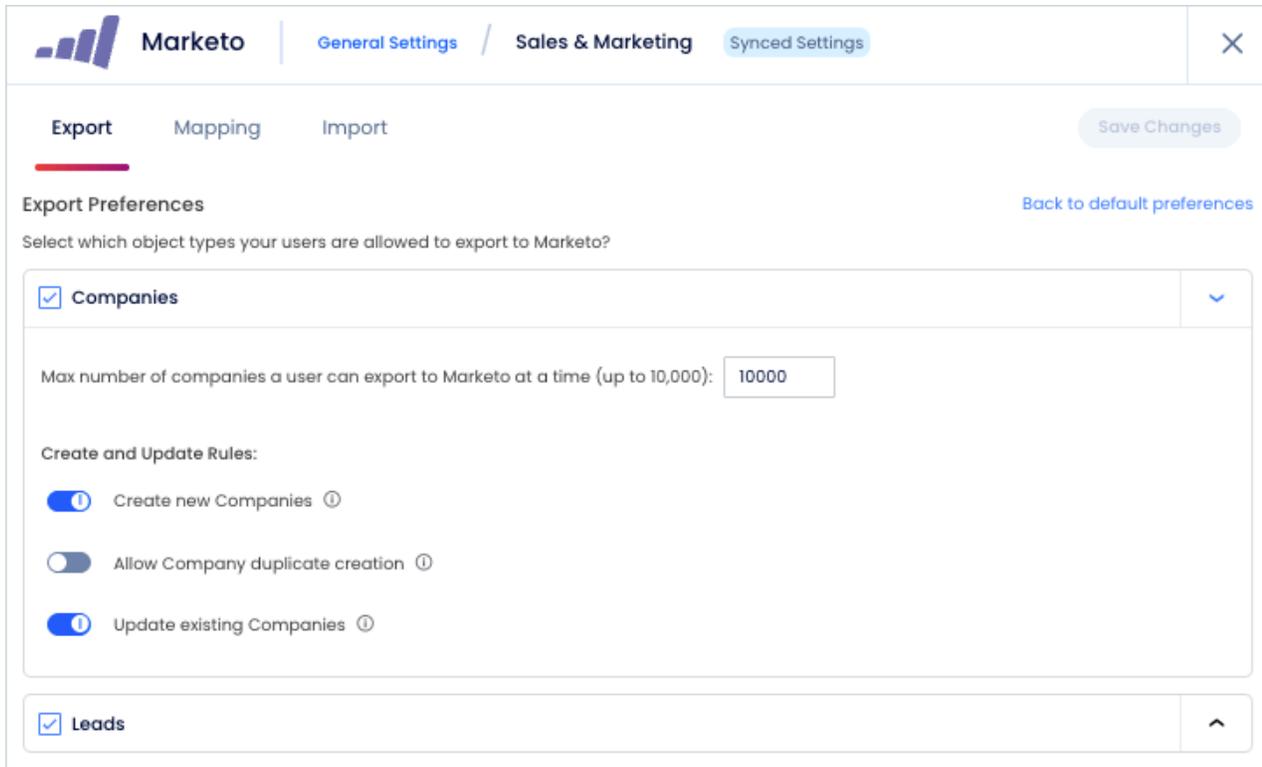


From this page, click **Edit settings** to begin configuring your integration.

Export Preferences

ZoomInfo admins can configure export preferences and limit the objects that can be exported.

1. Click the **Export** tab.
2. Select each object type you want your users to be able to export to Marketo.



Note: You can adjust the maximum number of records a user can export for each object type.

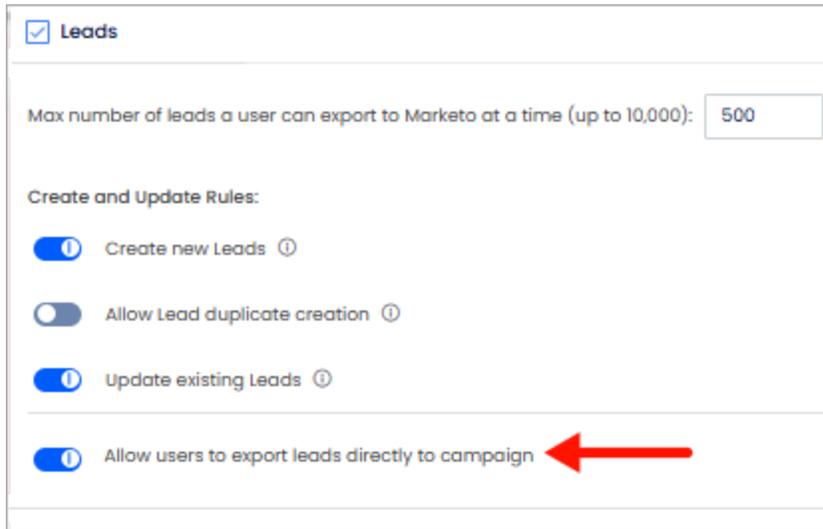
3. Click **Save Changes** to apply the changes for all users in your organization's ZoomInfo instance.

Important: If your organization has Marketo to Marketo 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.

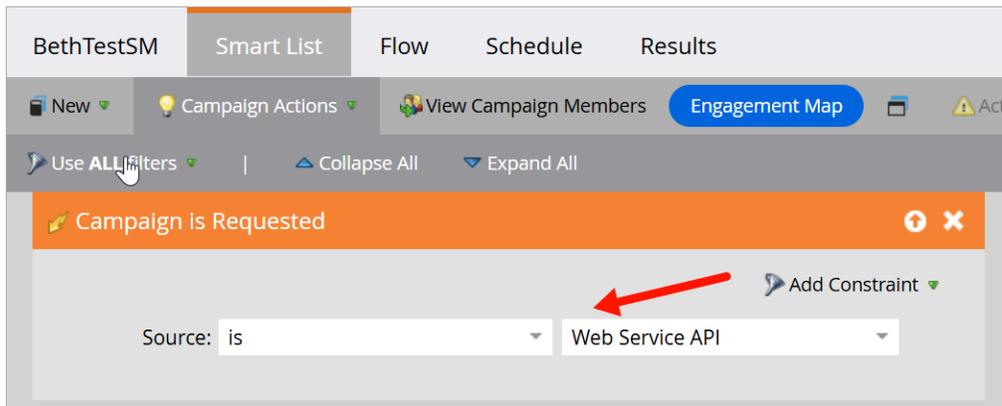
Exporting Leads to Marketo Campaigns

To allow users to export leads to Marketo campaigns admins should:

1. Enable **Allow users to export leads directly to campaign**.

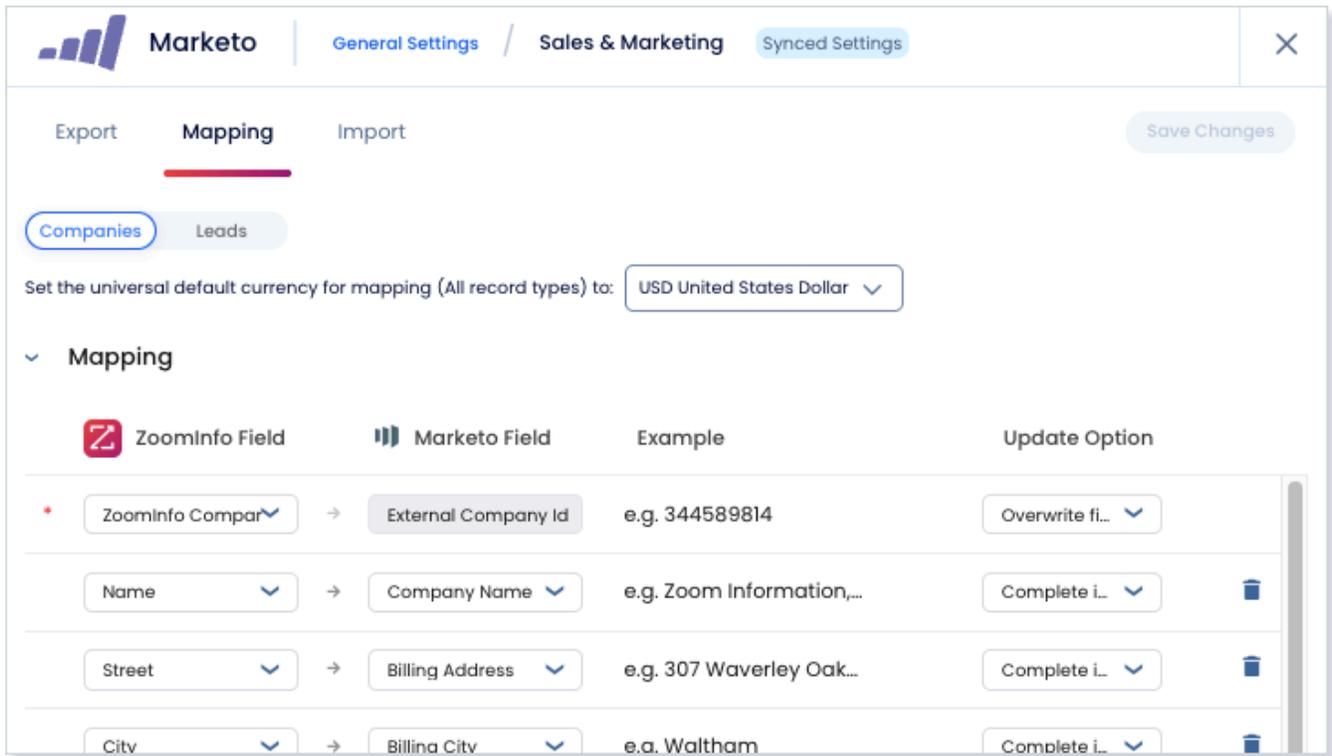


2. Update the **Smart Campaign** trigger to **Source is Web Service API**.



Custom Mapping

Click the **Mapping** tab.



On the **Mapping** tab, use the **Companies** and **Leads** tabs to review the default mappings for each object type and make any mapping changes.

Field	Description
ZoomInfo Field	Available ZoomInfo fields. Required fields are marked with an asterisk (*).
Marketo Field	Available Marketo fields. These fields are retrieved directly from your Marketo instance.
Update Options	Select an option: <ul style="list-style-type: none">• Complete if missing (default) - Only complete with ZoomInfo data if none exists in Marketo.• Overwrite field - Overwrite existing data in Marketo with ZoomInfo data.

Add or Remove Fields

Add fields by clicking **Add Row** at the bottom of the field list. Each field that you add must be mapped to a corresponding field in your integration.

Click the  trash icon to remove any fields that you do not want to map.

Set 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 may want to import both the ZoomInfo Direct Phone and Company Phone fields into the Marketo Business Phone field.

1. Map **Direct Phone** to **Business Phone**.
2. Map **Company Phone** to **Business Phone**.

The first occurrence of the **Business Phone** field is denoted with number 1, and the second with number 2.

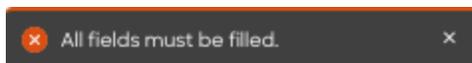


Test and Save

Before saving your mapping changes, click **Test Mapping** to export and delete a test record using your current settings.



- If the test record cannot be created, this is typically due to an error in the mapping settings. For example, mappings cannot be saved with a blank field.



Adjust the settings and click **Test Mapping** again.

- If the test is successful, a notification displays.

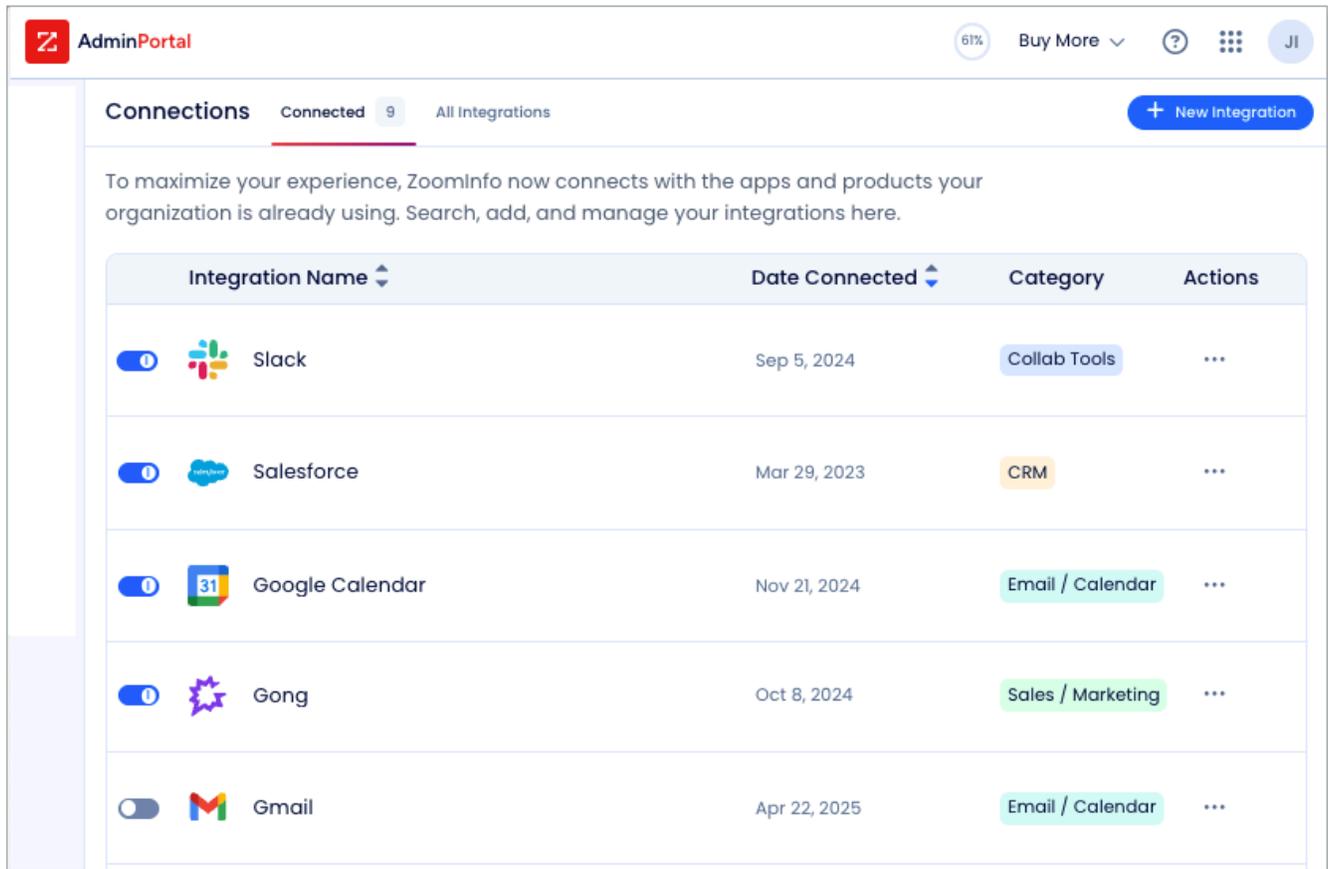


After performing a successful test mapping, click **Save Changes**.

- If the mappings are not set correctly, an error notification displays indicating the adjustments needed. Remove any unfilled rows and click **Save Changes** again.
- If mappings are correctly configured, a success notification displays.

View and Manage Connected Integrations

Once you've connected one or more integrations, you can view and manage them on the **Connected** tab.



On this page, you can:

1. Use the toggle to turn an integration on or off for users in your organization. Toggling an integration to off does not affect the mapping and export settings you've configured.
2. Update the settings for an integration by clicking the integration name, or by clicking ... > **Settings** in the **Action** column.
3. Delete a connected integration (including any mapping and export settings you've configured) by clicking ... > **Delete** in the **Action** column.

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 contacts using criteria applied in the following order:

1. Email Address
2. First Name + Last Name + Exact Company Name

Marketo Filtering

Organizations with a package that includes Marketo filtering can configure the filtering of lead objects from Marketo to ZoomInfo, enabling their ZoomInfo users to see Marketo ownership data on lead profiles within ZoomInfo. ZoomInfo users can utilize this information to refine their ZoomInfo searches to find new prospects faster.

User Experience

Before configuring Marketo filtering, it's important to understand the capabilities you are enabling for your organization's users.

Once configured, your organization's users can use the Marketo filters in Advanced Search to search for lead records, including the ability Include or exclude based on lead ownership with an option to exclude leads who have opted out of email. Users can also filter on lead score, urgency, and rating.

With the filtered Marketo data, users can:

- Include all owners to see all of the records matched from Marketo, or exclude all records matched from Marketo.
- Select up to 10 owners for each object type when filtering.
- Create saved search alerts based on Marketo ownership, helping users maintain a narrow focus on prospecting efforts.
- See indicators that a record exists in Marketo in search results.
- See additional indicators on ZoomInfo contact and company profile pages, including owner information and filter date. Clicking on the owner name will redirect to the existing Marketo record in a new tab.
- Filter on [matched lead data in Marketo](#) used to measure a person's interest in your organization's products and services.

Key Considerations

Disabling filtering for an object

If you subsequently disable filtering for an object, previously-filtered records are not deleted - disabling simply stops future filtering.

Clearing filtered records

If you want to remove records that are already filtered, you have the option to clear them so they no longer appear in searches and remove Marketo indicators. Clearing filtered records only removes the ownership information in ZoomInfo - your Marketo records are not impacted.

Record persistence

Marketo filtering will only persist the records ZoomInfo is able to match.

Duplicate records

If there are multiple leads within your Marketo instance, ZoomInfo will only match to one record.

Changes to records in Marketo

Only records that meet specified criteria at the time of filtering are filtered. Records that no longer meet the criteria are removed on subsequent filtering runs.

Scheduled runs

Scheduled filtering runs are performed on "off hours", specifically from 8PM to 6AM EST.

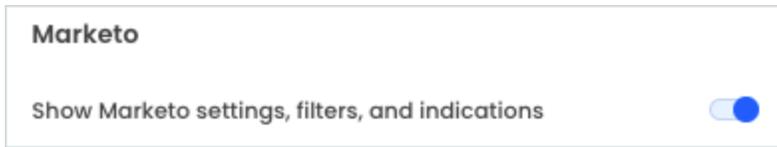
Permissions

The following permissions are needed:

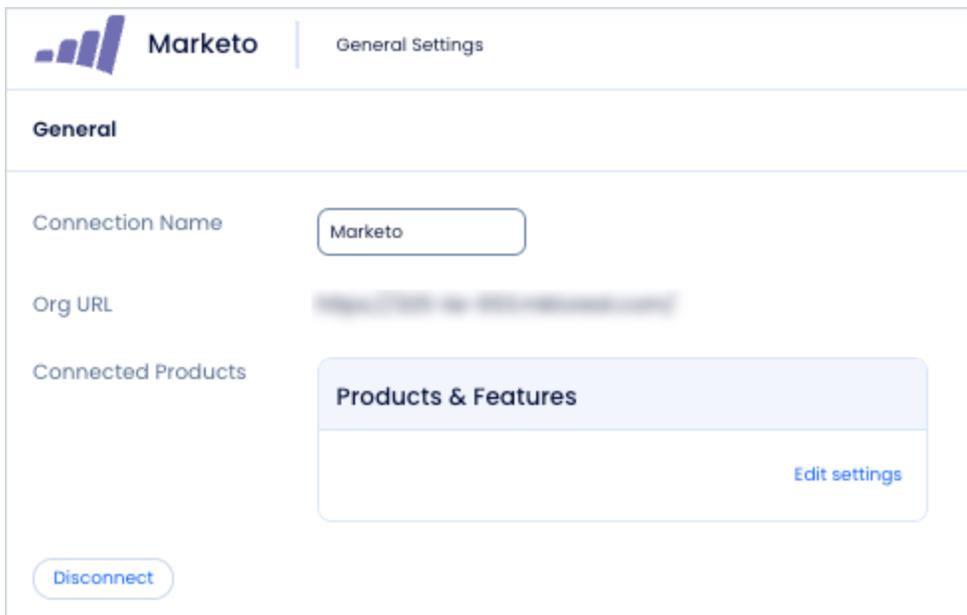
- **Access Admin:** Access Field Management
- **Access API:** Read-Write Company, Read-Write Person, Read-Only Assets
- **Access Database:** Advanced List Import or Import List

Configure Marketo Filtering Preferences

1. Go to **Admin Portal > Platform Settings > General Settings**.
2. Enable the **Show Marketo settings, filters, and indications** toggle for Marketo.



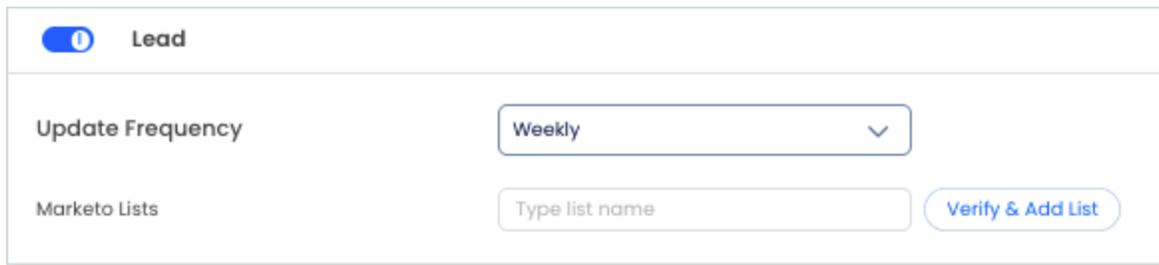
3. Go to **Admin Portal > Integrations > Connections**.
4. On the **Connected** tab, click Marketo and select **Edit Settings**.



5. Click the **Import** tab.

Schedule Filtering

Use the **Update Frequency** dropdown to schedule filtering for all configured object types.

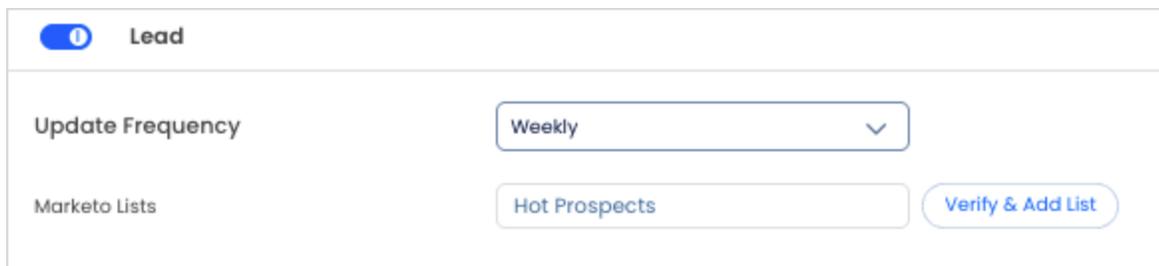


The screenshot shows a configuration panel for the 'Lead' object type. At the top left, there is a toggle switch labeled 'Lead' which is turned on. Below this, the 'Update Frequency' is set to 'Weekly' in a dropdown menu. Under the 'Marketo Lists' section, there is a text input field containing the placeholder text 'Type list name' and a blue button labeled 'Verify & Add List'.

If you choose **Weekly**, a full sync will occur once per week, beginning on the day you set it up, and recurring each week on that same day.

You can perform a full sync at any time by choosing the **Run Now** option on the **Mapping** tab for an object.

In **Marketo Lists**, you can type the name of an existing Marketo List so your users can filter Marketo records using the list. Click **Verify & Add List** to add the list.



This screenshot is similar to the one above, but the 'Marketo Lists' text input field now contains the text 'Hot Prospects' instead of the placeholder. The 'Verify & Add List' button remains visible.

Enable or Disable Filtering

Enable or disable filtering for an object type at any time using the toggle.

Clear Matched Records

You can delete existing records that were previously filtered and matched to ZoomInfo. For example, click **Clear All Matched Leads**.

Important: This action has no impact on records in your Marketo instance - it simply removes records that were matched to ZoomInfo so that they will no longer appear in search results.

Managing and Monitoring Filtering

At any time, you can return to the **Import** tab to view details about your runs, adjust settings, and enable or disable filtering. You can also manually initiate an off-schedule filtering run by clicking **Run Now**.

Run statistics are provided for each object. Roll over the info icons to view the definition of each statistic.

Data Sharing

The Data Sharing page in the Admin Portal 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 make recommendations to you.

1. Go to **Admin Portal > Data Sharing**.

- If your organization has chosen to opt-out of data sharing, the following message displays:

As a precaution, this function is set to OFF and is not editable, in order to prevent unintended changes that may be in conflict with your organization's contractual terms.

- If your organization has not opted out of data sharing, the **Data Sharing** page displays with the ON/OFF toggles enabled.
2. Data collection is subject to ZoomInfo's Privacy Policy. Review the policy details using the link provided.
 3. Review and manage the data sharing settings according to your organization's data sharing preferences.
 4. Over time, you can review the **Contributions** tab to monitor the contributions made by your organization.

Connect Users

Once the ZoomInfo admin has enabled the integration for all users by clicking the toggle to the left of the integration in the Admin Portal, individual ZoomInfo users can connect to Marketo.

Admins should share the following link with users for instructions on [how to connect Marketo](#).