Informatica Cloud Application Integration

Marketo Connector v 1.0

September 1, 2018

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Overview:

Marketo is one of the most widely-used marketing automation solutions. This Cloud Application Integration Connector for Marketo provides all the components to enable the developer to authenticate with Marketo using the Marketo Identity API, and then perform two different operations.

1. Query the Leads database with a Lead ID using the Marketo Lead Database API and retrieve an associated email address
2. Retrieve metadata on a Folder using the Marketo Asset API.

These connectors were created using the Swagger files created here, using your Marketo Munchkin ID with the “Get Lead Database Definition”, “Get Identity Definition”, and “Get Asset Definition” operations.

Prerequisites:

- A Marketo account, either corporate or partner. Partner registration is available through Marketo’s LaunchPoint program.
- Marketo Munchkin ID
- Marketo Login Credentials
    - Marketo client id
    - Marketo client secret
    - Marketo grant type
    - Marketo partner ID
- Appropriate role/permissions on Informatica Cloud Application Integration to perform an IMPORT operation

Use Case #1: Retrieving a Lead's email address by Lead ID

1. Invoke with login credentials and lead ID
2. Login credentials get validated by Marketo and an access token is returned
3. The access token and the lead ID are then sent to Marketo
    a. The access token is validated
    b. The Leads database is queried using the getLeadByIdUsingGET action of the Leads database API.
4. Results of the lead ID lookup
    a. Success – return the associated email address
    b. Failure – return an error message.

Use Case #2: Retrieving folder metadata

1. Invoke with login credentials
2. Login credentials get validated by Marketo and an access token is returned
3. The Asset API is invoked with the access token and the getFolderUsingGET action
    a. The access token is validated
    b. The Assets are queried, specifically looking for assets of type “Folder”
4. Results of the Asset API invocation
    a. Success – The name and description of the first folder is returned.
    b. Failure – An error message is returned.

Quick Setup

1. Download the Marketo Connector package from the Informatica CAI Git Repository
2. Import the package “MarketoConnectorPackage.zip” into your CAI workspace
3. This creates a project named “Marketo”, with 8 assets in it.
4. Go to the “Marketo” project
5. Publish the “Marketo Authentication API” Service Connector
6. Modify the Marketo-Authentication-API-actions Connection
    a. Under Properties, use your organization’s Munchkin ID to provide the value for hostName. It should be of the format <munchkinID>.mktorest.com
    b. Save the Connection
    c. Publish the Connection

7. Publish the other components in this order
    a. "Marketo Lead Database API" Service Connector
    b. “Marketo-Lead-Database-API-actions” Connection
    c. "Marketo Lead Retrieval by ID" Process
    d. “Marketo Asset API” Service Connector
    e. “Marketo-Asset-API-actions” Connection
    f. “Marketo Get Folder Metadata” Process

8. Test the “Marketo Lead Retrieval by ID” process in your REST tool of choice (Postman, RESTed, etc.)
    a. Define a POST operation
    b. The Request URL is the Service Address from the published “Marketo Lead Retrieval by ID” process
        i. Actions-> Properties Detail…-> Service URL-> Copy
    c. The request is of type “application/json”
    d. Set the body of the request to this:

```
{
  “Client ID”:”<Your Client ID>”,
   "Client Secret": "<Your Client Secret>",
   "Grant Type": "client_credentials",
  “Lead ID”: “<Your Lead ID>”
}
```

    e. Invoke the operation (“Send”, in the case of Postman, “Send Request” with Rested)
    f. Assuming valid credentials and Lead ID, you should receive a response that looks similar to this:

```
{
  “Status Message”: “The lead email address is: abc@xyz.com “
}
```

9. Test the “Marketo Get Folder Metadata” process in your REST tool of choice (Postman, RESTed, etc.)

a. Define a POST operation
b. The Request URL is the Service Address from the published “Marketo Get Folder Metadata” process
    i. Actions-> Properties Detail…-> Service URL-> Copy
c. The request is of type application/json
d. Set the body of the request to this:

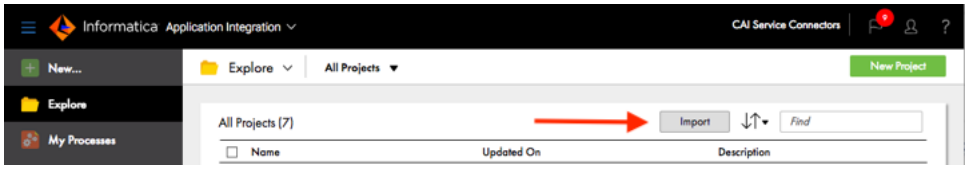
```
{
  “Client ID”:”<Your Client ID>”,
   "Client Secret": "<Your Client Secret>",
   "Grant Type": "client_credentials",
}
```

e. Invoke the operation (“Send”, in the case of Postman, “Send Request” with Rested)
f. Assuming valid credentials and Lead ID, you should receive a response that looks similar to this:

```
{
   "Status Message": "Folder details are available. The first folder name is Marketing Activities",
   "Folder Description": "Root node for the Marketing Activities app area"
}
```

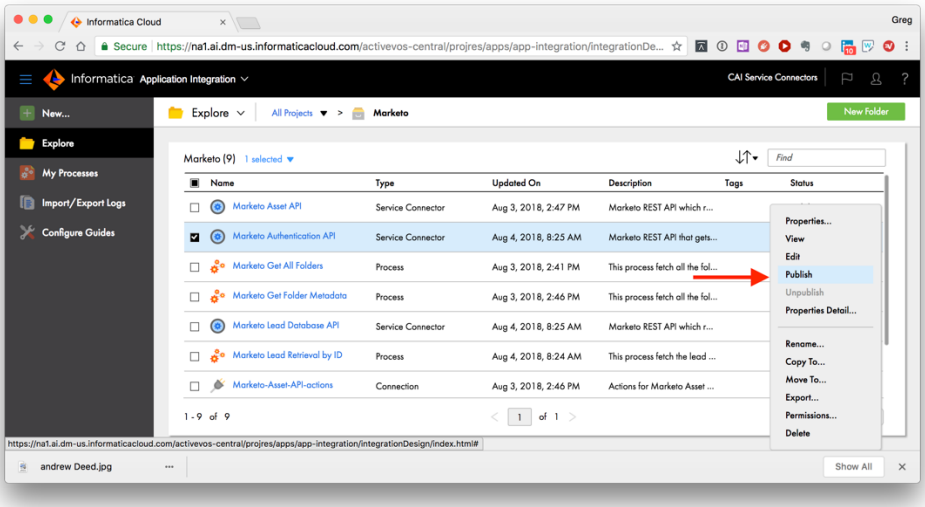
Detailed Setup:

1. Download the Marketo Connector package from the [Informatica CAI Git Repository]
2. Import the package “MarketoConnectorPackage.zip” into your CAI workspace

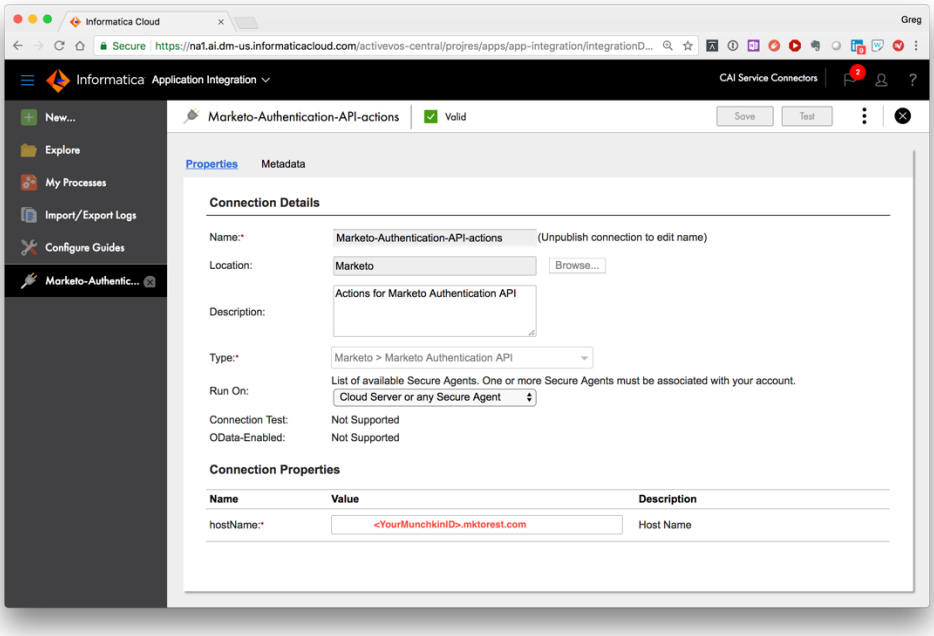


   a. Upon completion, the import process will have created a new project named "Marketo" at the root level of your CAI workspace, containing 8 assets.
   b. "Marketo Authentication API" Service Connector
   c. "Marketo Lead Database API" Service Connector
   d. “Marketo-Authentication-API-actions” Connection
   e. “Marketo-Lead-Database-API-actions” Connection
   f. "Marketo Lead Retrieval by ID" Process
   g. “Marketo Asset API” Service Connector
   h. “Marketo-Asset-API-actions” Connection
   i. “Marketo Get Folder Metadata” Process

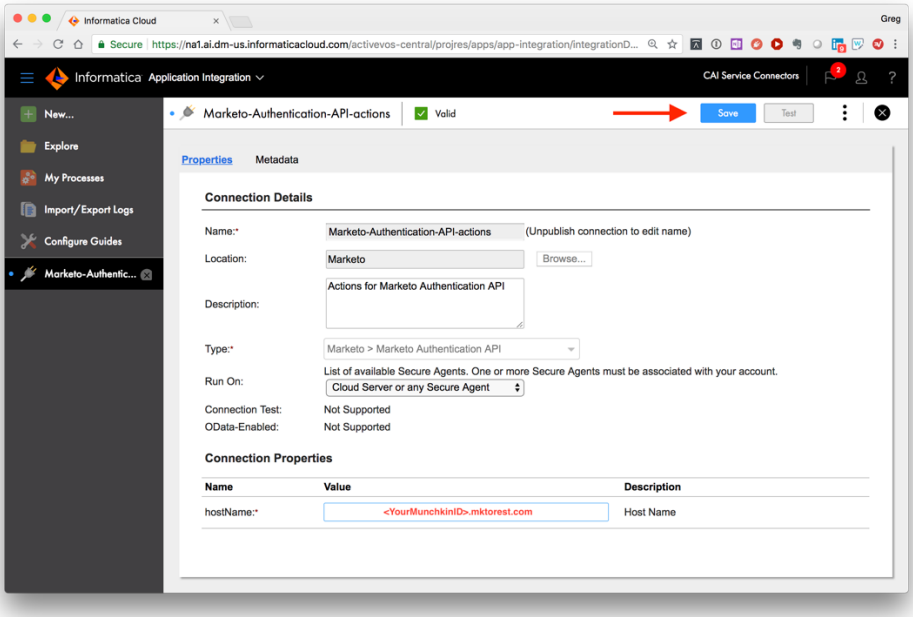
3. Publish the “Marketo Authentication API” Service Connector



4. Edit the “Marketo-Authentication-API-actions” Connection.
   a. Insert your organization’s “Munchkin ID” value in the Connection Properties, using the format <YourMunchkinID>.mktorest.com.



b. Save the “Marketo-Authentication-API-actions” Connection.



c. Publish the “Marketo-Authentication-API-actions” Connection.

5. Publish the “Marketo Lead Database API” Service Connector

6. Publish the Marketo-Lead-Database-API-actions Connection

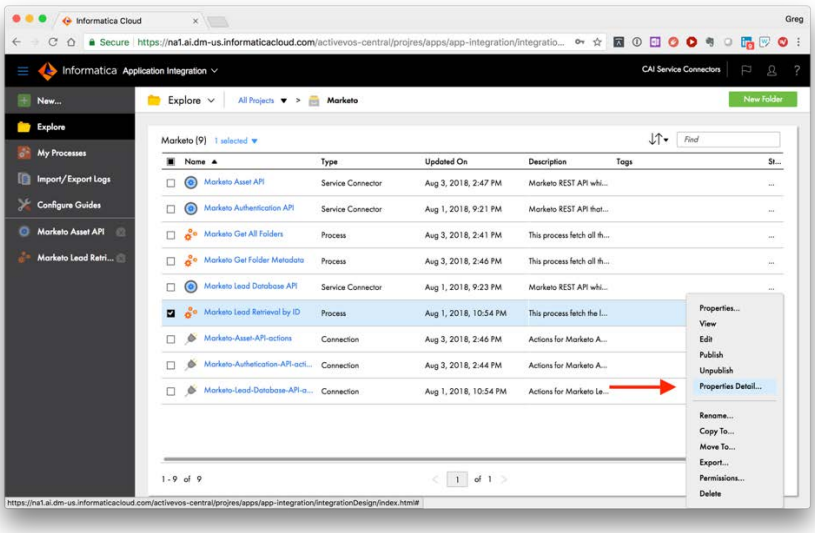
7. Publish the "Marketo Lead Retrieval by ID" Process.

8. Publish the “Marketo Asset API” Service Connector

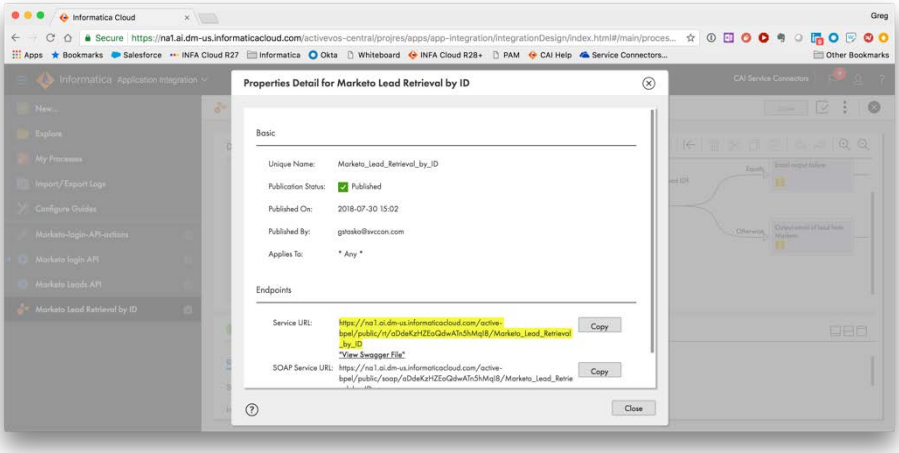
9. Publish the “Marketo-Asset-API-actions” Connection

10. Publish the “Marketo Get Folder Metadata” Process

11. Test the “Marketo Lead Retrieval by ID” process:
    a. Open the “Properties Detail” of the " Marketo Lead Retrieval by ID" process.



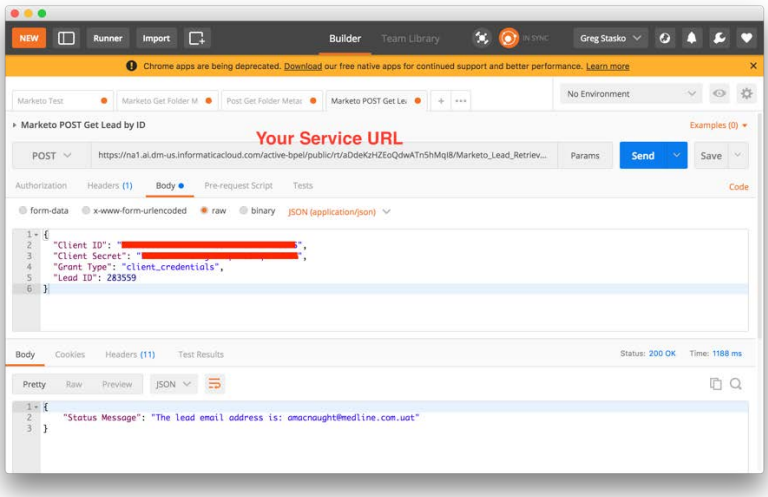
    b. Retrieve the “Service URL” of the "Marketo Lead Retrieval by ID" process.



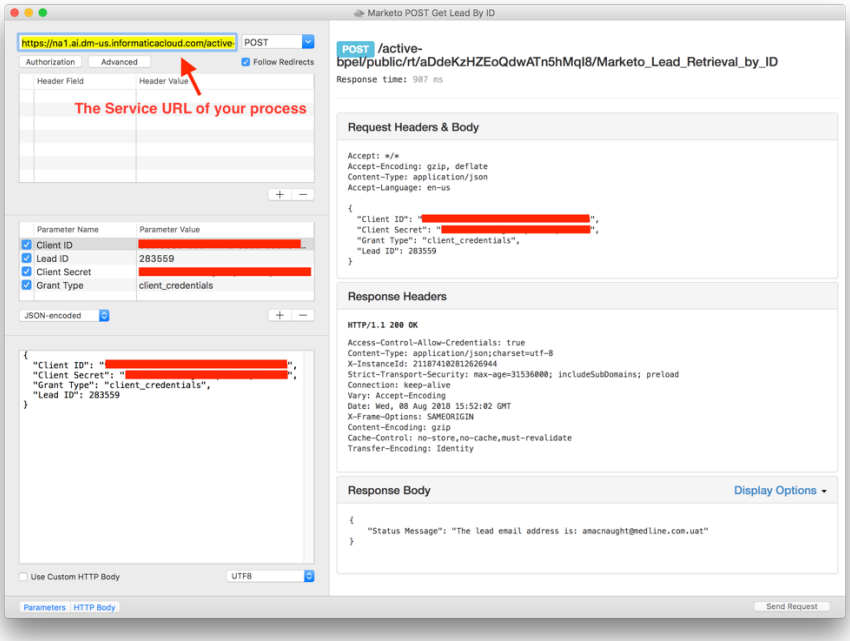
    c. Define a POST operation in your REST tool
    d. The Request URL is the Service Address from the published “Marketo Lead Retrieval by ID” process
    e. The request is of type “application/json”
    f. Set the body of the request to this:
    {

“Client ID”:”<Your Client ID>”
"Client Secret": "<Your Client Secret>",
"Grant Type": "client_credentials",
“Lead ID”: “<Your Lead ID>”
}

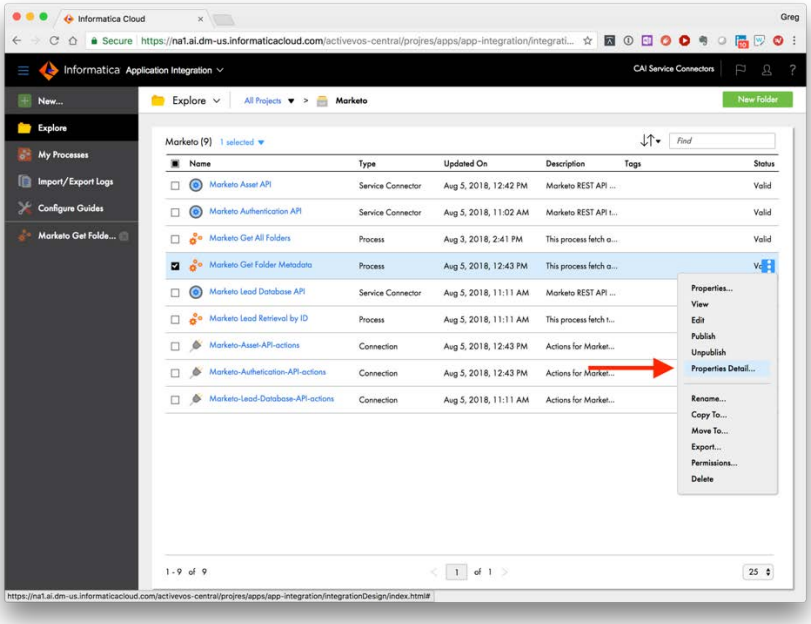
g. Postman



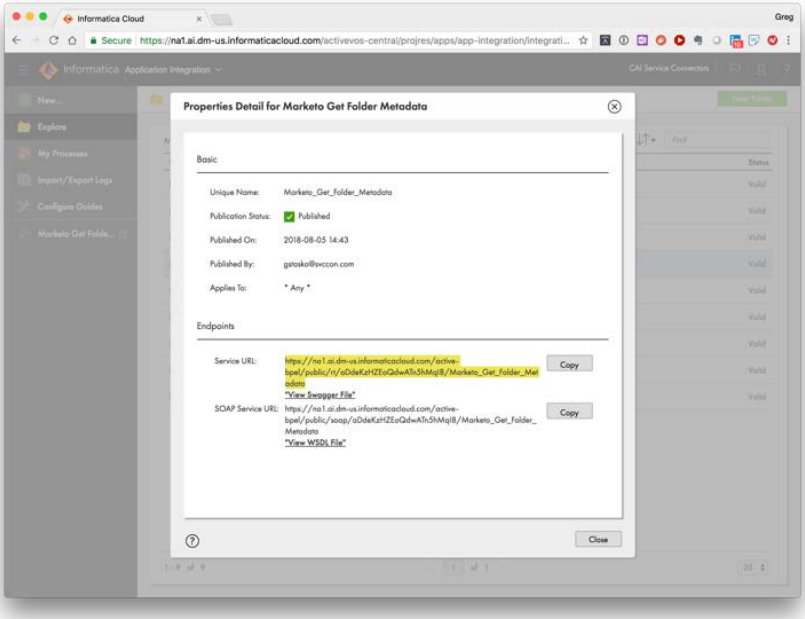
RESTed



12. Test the “Marketo Get Folder Metadata” Process:
    a. Open the “Properties Detail” of the "Marketo Get Folder Metadata" process.



    b. Retrieve the “Service URL” of the " Marketo Get Folder Metadata" process.

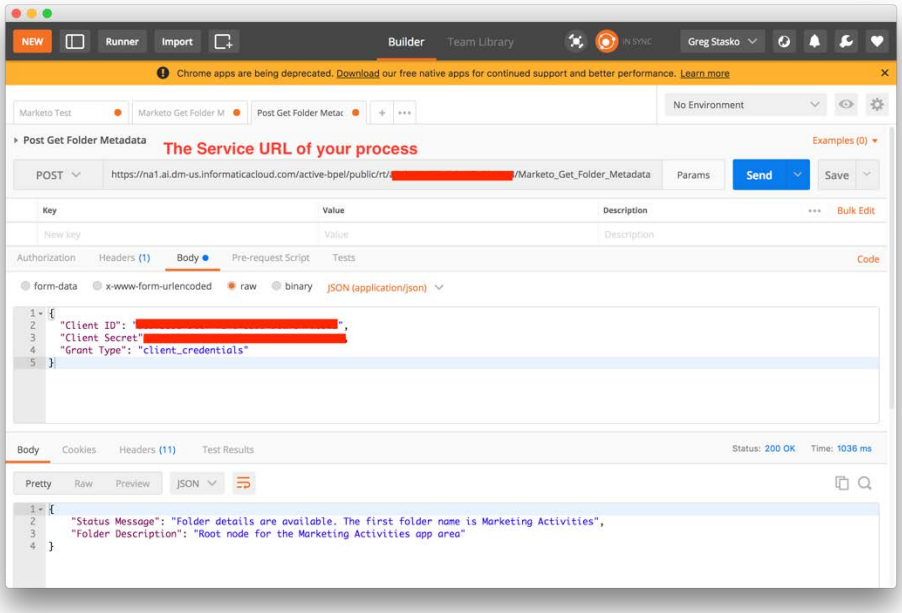
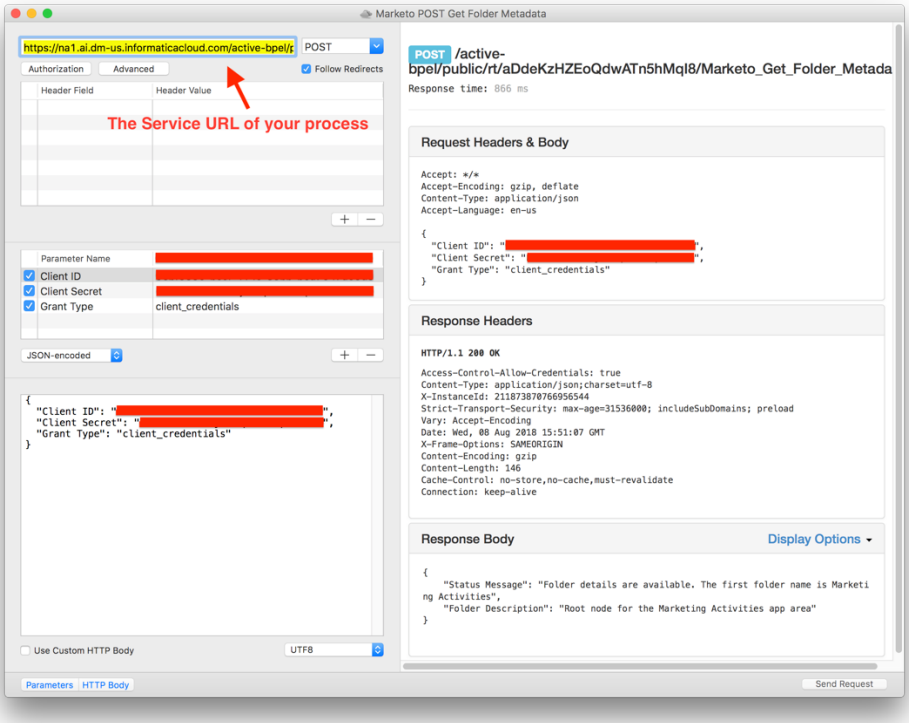


    c. Test in your REST tool of choice (Postman, RESTed, etc.)
        i. POST operation
        ii. The “Service URL” from the "Marketo Get Folder Metadata" Process
        iii. The request is of type “application/json”.
        iv. Set the body of the request to this:

```
{
```

"Client ID":"<Your Client ID>",
"Client Secret": "<Your Client Secret>",
"Grant Type": "client_credentials",
}

v. Postman



RESTed