

Customer Setup For Marketo WebAPI Integration

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Setup a Microsoft Dynamics CRM App

Register an app with Azure AD

1. Use the instructions at <https://docs.microsoft.com/en-us/powerapps/developer/common-data-service/walkthrough-register-app-azure-activedirectory#create-an-application-registration>
2. Provide relevant application name, such as, "Marketo Integration"
3. Note down the Application ID (ClientId) since you will need to enter it in Marketo Admin later

Grant Admin Consent

1. In the App Permissions menu, grant admin consent for Microsoft

Grant consent

As an administrator, you can grant consent on behalf of all users in your directory. Granting admin consent allows the application to access all data in the directory. It may be a good idea to grant admin consent to the application.

Grant admin consent for this app.

Grant admin consent for this app.

Generate Client Secret

Go to menu Item 'Certificates & secrets'

The screenshot shows the Azure Active Directory admin center interface. The left-hand navigation pane is open, showing the 'Certificates & secrets' menu item selected. The main content area displays the 'Market Integration - Certificates & secrets' page. This page includes a search bar, a description of credentials, and two sections: 'Certificates' and 'Client secrets'. Both sections currently show 'No certificates have been added for this application' and 'No client secrets have been created for this application.' respectively. There are buttons for 'Upload certificate' and 'New client secret'.

Click 'New client secret'

Client secrets

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

[+ New client secret](#)

DESCRIPTION	EXPIRES	VALUE
New client secret		

Add a client secret

Marketo Integration - Certificates & secrets

Search (Ctrl+/)

- Overview
- Quickstart
- Manage
 - Branding
 - Authentication
 - Certificates & secrets**
 - API permissions
 - Export an API

Add a client secret

Description
Marketo Integration Client Secret

Expires
 In 1 year
 In 2 years
 Never

[Add](#) [Cancel](#)

Click Add.

After successful creation of Client Secret.

Client secrets

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

[+ New client secret](#)

DESCRIPTION	EXPIRES	VALUE
Marketo Integration Client Secret	12/31/2299	7ae1jNXzh+b_vA1xtjF.3x4CN3F5V/fA

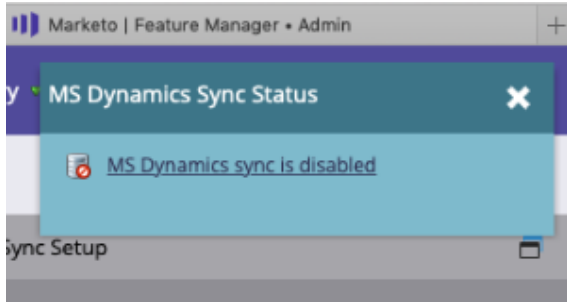
NOTE: Client Secret is shown only once.

When you navigate away from current screen, secret will be hidden forever.

Note down the Client Secret since you will need to enter it in Marketo Admin later.

Enter the Dynamics CRM Generated Client Id And Secret into Marketo

1. Disable Sync

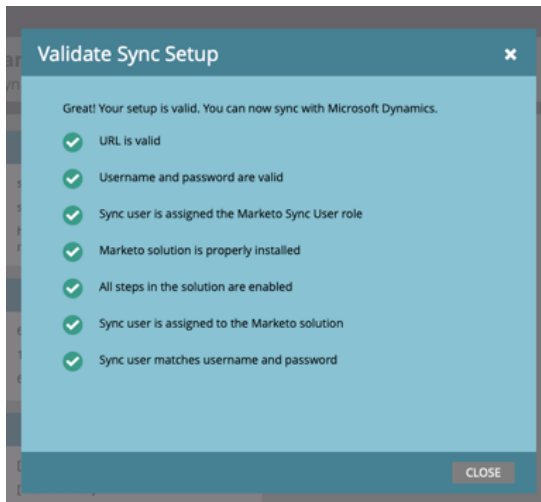


2. Validate ClientId and Client Secret

- a. Select "Validate Sync" from the Marketo Admin Dynamics menu.
- b. Enter clientId and client secret generated from the Dynamics CRM side.
- c. Submit to validate the credentials

A screenshot of the 'Validate Sync Setup' dialog box. The title bar says 'Dynamics synchronization' and 'Validate Sync Setup' with a close button (X). The main content area has the text: 'Enter the following to validate your setup before you sync with Microsoft Dynamics.' Below this are five input fields, each with a red asterisk indicating a required field:

- Username: mktodev01sync@marketoengg.onmicrosoft.com
- Password: [masked with dots]
- URL: https://mktodev01.crm.dynamics.com/XRMServices/
- ClientId: c3019f9f-9dbf-4a0c-8c58-f610bc6469ca
- ClientSecret: +2U1BYm6[m5b@=9nj64N/Rtg-5BMBI-D

At the bottom right, there are two buttons: 'CANCEL' and 'NEXT'. At the bottom center, there is an 'EDIT' button.

3. Save ClientId and Client Secret After Successful Validation

- a. If 'Validate Sync' is successful with the clientId and client secret entered, then click Edit Credentials, reenter the same clientId and client secret and click save.

Edit Credentials [X]

Username: * mktodev01sync@marketoengg.onmicros

Password: * [Eye Icon]

URL: * https://mktodev01.crm.dynamics.com/XF

Client Id: c3019f9f-9dbf-4a0c-8c58-f610bc6469ca

Client Secret: +2U1BYm6[m5b@=9nj64N/Rtg-5BMBI-D

[CANCEL] [SAVE]

4. Reenable Sync

- a. Upon reenabling, the Sync will resume.
- b. It will continue to use SOAP API, if the WebAPI feature has not been enabled in the subscription.