



Informatica® Cloud Application Integration
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Synchronize Dynamics 365
Contacts with Marketo Leads

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Preface

Use *Synchronize Dynamics 365 Contacts with Marketo Leads* to learn how to synchronize a Dynamics 365 contact with a Marketo lead based on a webhook request from Dynamics 365. This guide assumes that you have an understanding of the Dynamics 365 Connector and Marketo Connector concepts.

CHAPTER 1

Introduction to Synchronize Dynamics 365 Contacts with Marketo Leads recipe

The Synchronize Dynamics 365 Contacts with Marketo Leads recipe is based on REST and SOAP APIs. Use the recipe to synchronize a Dynamics 365 contact with a Marketo lead based on a webhook request from Dynamics 365 without manual intervention.

When a contact is created or updated in Dynamics 365, the configured webhook for Dynamics 365 triggers the process. The process checks whether the email for the Dynamics 365 contact exists in Marketo. If the email for the Dynamics 365 contact doesn't exist, the process displays an error.

The process then checks whether the contact has an associated account. If the Dynamics 365 contact contains account information, the process creates a lead in Marketo with company information. If the Dynamics 365 contact doesn't contain account, the process creates a lead in Marketo without company information.

The process then searches for leads by the email in Marketo and creates or updates the leads based on the search results.

The process requires webhook configuration in Dynamics 365.

Prerequisite for creating a webhook in Dynamics 365

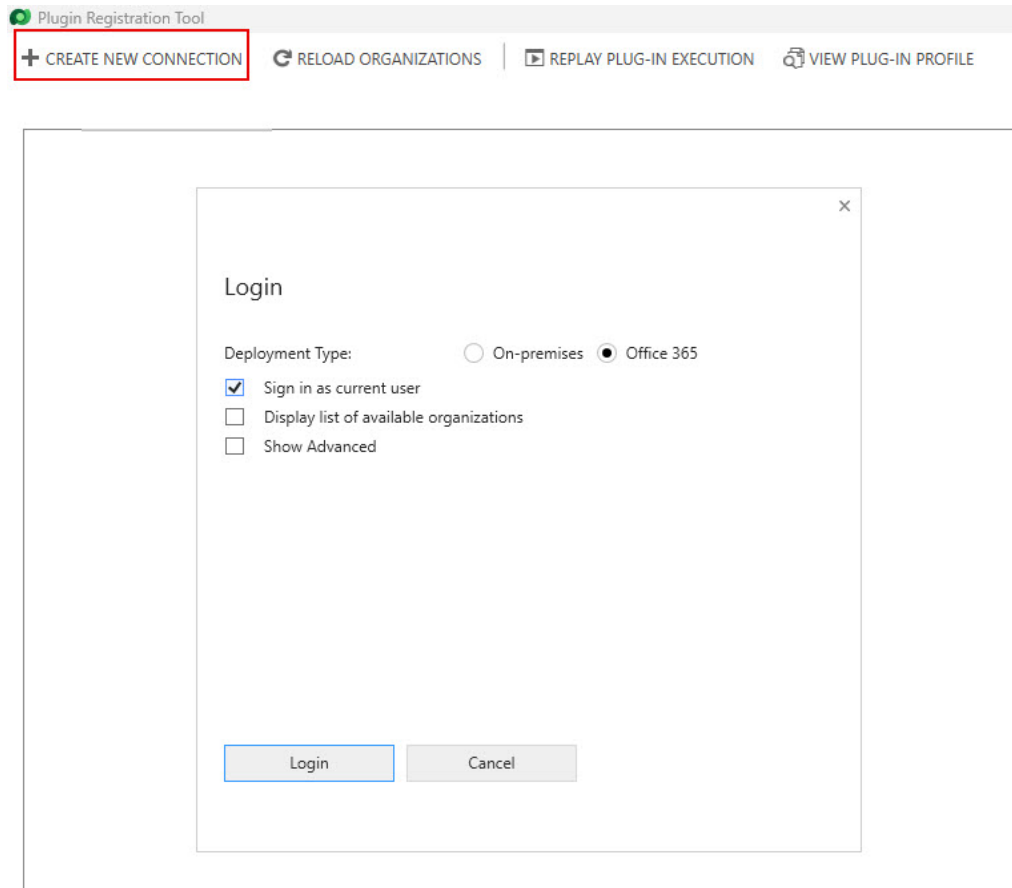
Webhooks are a way to communicate when an event occurs in one system with another system.

You can create webhooks in various ways. In this recipe, we have used the Plug-in Registration Tool.

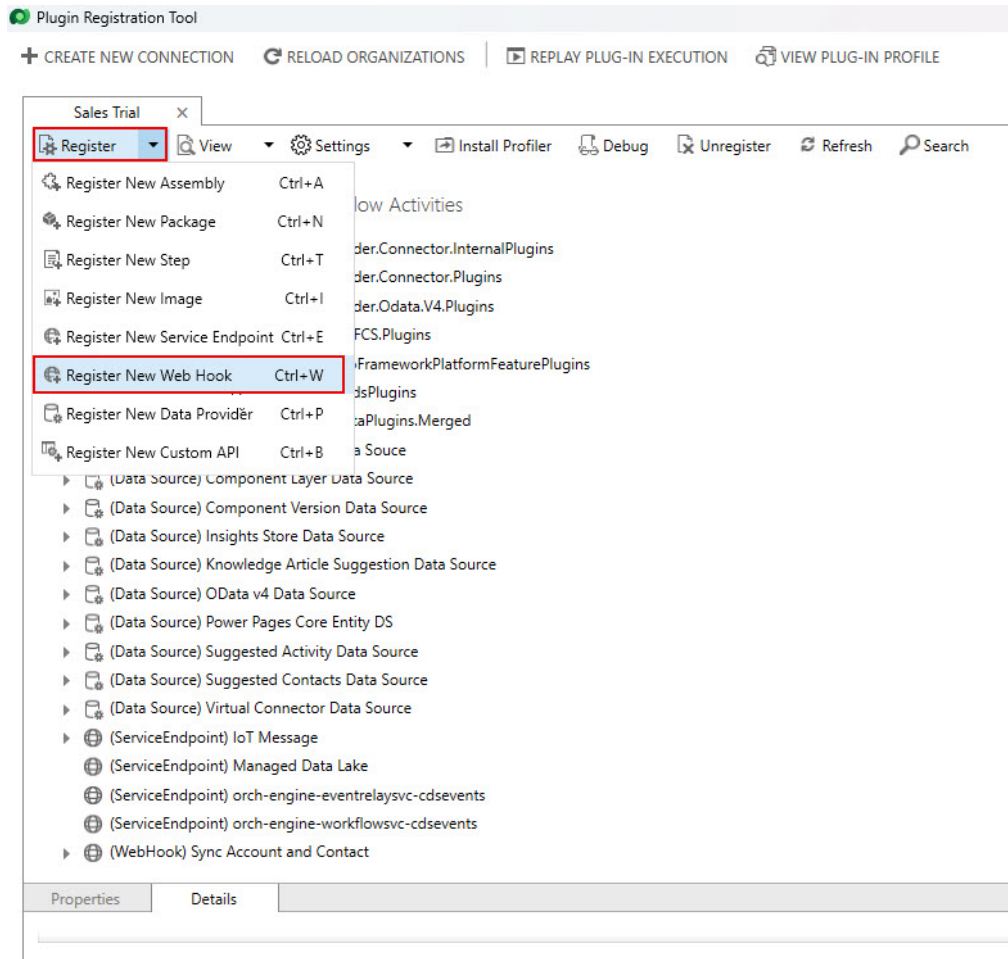
Use the Plug-in Registration Tool to [register a webhook](#). To get the Plug-in Registration Tool, see [Dataverse development tools](#).

To create a webhook in Dynamics 365, perform the following steps:

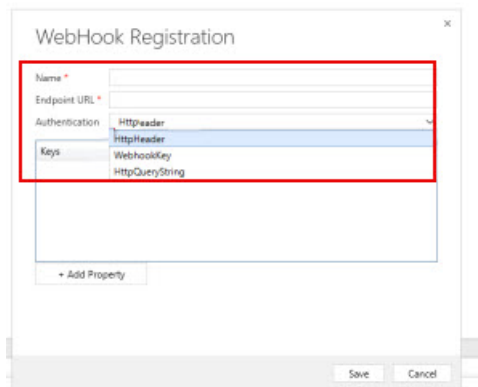
1. Open the Plug-in Registration Tool and log in to your organization.
2. Click **CREATE NEW CONNECTION** on the **Plugin Registration Tool** page.
The following image shows the **CREATE NEW CONNECTION** button on the **Plugin Registration Tool** page:



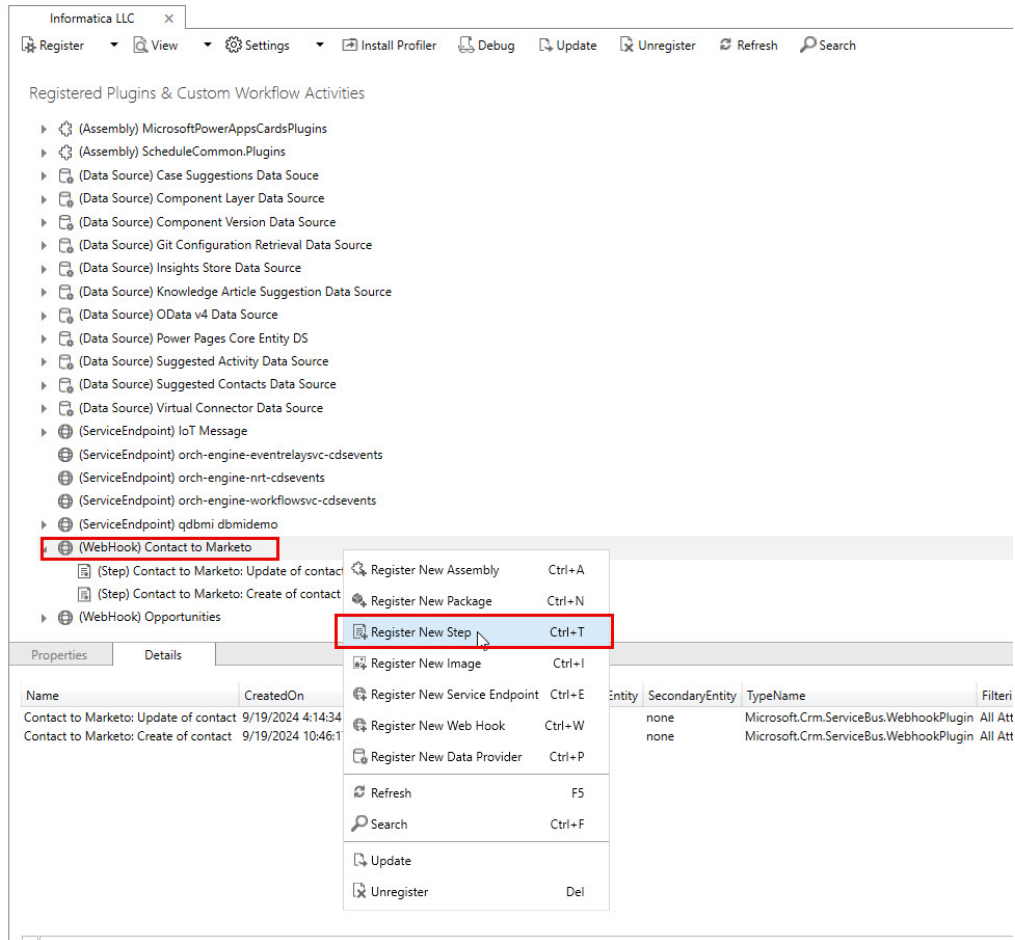
3. Go to **Register** and select **Register New Web Hook**.
The following image shows the **Register New Web Hook** option on the **Register** menu:



4. Enter the webhook name, the [“Step 5: Invoke the process” on page 15](#) that you copied while invoking the process, and the authentication method, and click **Save**.
The following image shows the **WebHook Registration** dialog box:



5. Go to **WebHook** and select **Register New Step**.
The following image shows the **Register New Step** option:



6. In the **Register New Step** page, enter the value as **Create** in the **Message** field, **contact** in the **Primary Entity** field, select **Asynchronous** in the **Execution Mode** field, and then click **Register New Step**. The following image shows the **Register New Step** page:

Register New Step

General Configuration Information

Message *	Create
Primary Entity	contact
Secondary Entity	
Filtering Attributes	All Attributes
Event Handler	(WebHook) Contact to Marketo
Step Name *	Contact to Marketo: Create of contact
Run in User's Context	Calling User
Execution Order *	1
Description	Contact to Marketo: Create of contact

Event Pipeline Stage of Execution: PostOperation

Execution Mode: Asynchronous Synchronous

Deployment: Server Offline

Delete AsyncOperation if StatusCode = Successful

Unsecure Configuration

Secure Configuration

Register New Step Cancel

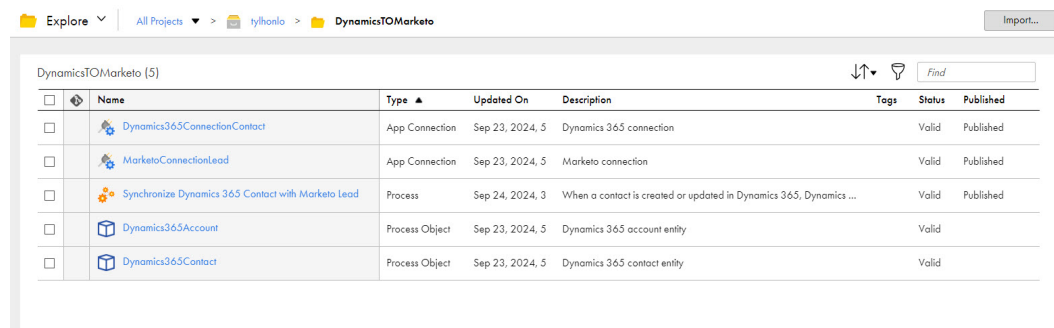
- Similarly, follow steps 3 through 5 to register a new step for the update contact.
- In the **Register New Step** page, enter the value as **Update** in the **Message** field, **contact** in the **Primary Entity** field, select **Asynchronous** in the **Execution Mode** field, and then click **Register New Step**.

CHAPTER 2

Synchronize Dynamics 365 Contacts with Marketo Leads recipe contents

The recipe contains multiple assets, such as process objects, app connections, and a process.

The following image shows the assets that the Synchronize Dynamics 365 Contacts with Marketo Leads recipe package contains:



The screenshot shows the Dynamics 365 Asset Explorer interface. The breadcrumb path is 'Explore > All Projects > tylhonlo > DynamicsTOMarketo'. The main table lists the following assets:

Name	Type	Updated On	Description	Tags	Status	Published
Dynamics365ConnectionContact	App Connection	Sep 23, 2024, 5	Dynamics 365 connection		Valid	Published
MarketoConnectionLead	App Connection	Sep 23, 2024, 5	Marketo connection		Valid	Published
Synchronize Dynamics 365 Contact with Marketo Lead	Process	Sep 24, 2024, 3	When a contact is created or updated in Dynamics 365, Dynamics ...		Valid	Published
Dynamics365Account	Process Object	Sep 23, 2024, 5	Dynamics 365 account entity		Valid	
Dynamics365Contact	Process Object	Sep 23, 2024, 5	Dynamics 365 contact entity		Valid	

Synchronize Dynamics 365 Contacts with Marketo Leads recipe assets

The following table lists the assets that the Synchronize Dynamics 365 Contacts with Marketo Leads recipe package contains:

Asset Name	Asset Type	Description
Dynamics365Account	Process object	Dynamics 365 account entity.
Dynamics365Contact	Process object	Dynamics 365 contact entity.

Asset Name	Asset Type	Description
Dynamics365ConnectionContact	App connection	Dynamics 365 connection.
MarketoConnectionLead	App connection	Marketo connection.
Synchronize Dynamics 365 Contact with Marketo Lead	Process	<p>When a contact is created or updated in Dynamics 365, Dynamics 365 sends a webhook and triggers the process. The process checks whether the email for the Dynamics 365 contact exists in Marketo. If the email for the Dynamics 365 contact doesn't exist, the process displays an error.</p> <p>The process then searches for leads by the email in Marketo and creates or updates the leads based on the search results.</p> <p>The process requires webhook configuration in Dynamics 365.</p>

CHAPTER 3

Using the Synchronize Dynamics 365 Contacts with Marketo Leads recipe

To use the Synchronize Dynamics 365 Contacts with Marketo Leads recipe, you must perform the following steps manually:

Step 1: Copy and access the recipe

Step 2: Configure and publish the Dynamics 365 connection

Step 3: Configure and publish the Marketo connection

Step 4: Configure and publish the process

Step 5: Invoke the process

Step 6: Test data synchronization from Dynamics 365 contacts to Marketo leads

Step 1: Copy and access the recipe

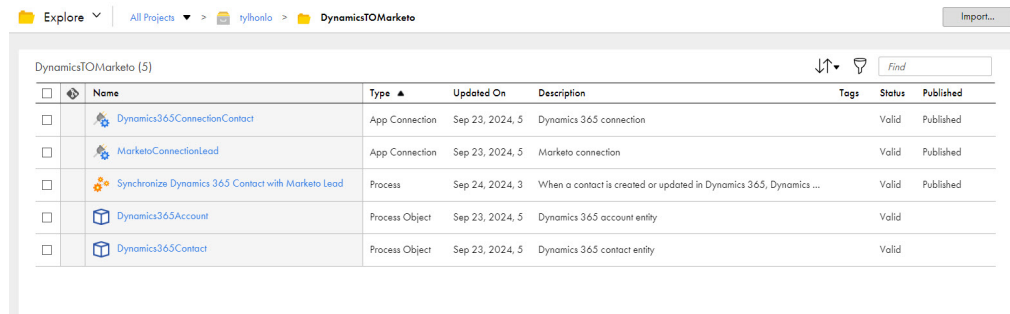
Copy the pre-configured assets in the recipe to a separate project or folder.

1. Open the **Synchronize Dynamics 365 Contacts with Marketo Leads** recipe and click **Use**.
2. Select the location where you want to copy the recipe, and then click **Continue**.
3. In the **Copying the recipe** dialog box, click **OK**.

It might take some time for the recipe to get copied. You will receive a notification when the recipe is ready for use.

4. After the recipe is copied, click **Explore** to access the recipe content.

- Navigate to the project or folder where you copied the recipe or enter the recipe name in the **Find** box. All the assets in the recipe are displayed as shown in the following image:



Step 2: Configure and publish the Dynamics 365 connection

Configure the tenant and client details in the Dynamics365ConnectionContact connection, and then publish the connection.

- Open the **Dynamics365ConnectionContact** connection.
- From the **Type** list, select **Dynamics365**.
- From the **Run On** list, select **Cloud Server or any Secure Agent**.
- In the **Connection Properties** section, enter values for the following properties:

Property	Description
Tenant_ID	Dynamics 365 tenant ID to get the access token. Enter the tenant ID that you generated under Microsoft Entra ID > App registrations in Dynamics 365 after creating the client credentials.
Client_ID	Dynamics 365 client ID to generate a valid access token. Enter the client ID that you generated under Microsoft Entra ID > App registrations in Dynamics 365.
Client_Secret	Dynamics 365 client secret that you generated under Microsoft Entra ID > App registrations in Dynamics 365.
Grant_type	Grant type that the Dynamics 365 instance uses to get an access token for third-party client authorization. Enter the value as client_credentials .
Resource_URL	URL to access the Dynamics 365 instance.

- Save and publish the connection.

Step 3: Configure and publish the Marketo connection

Configure the host and client details in the MarketoConnectionLead connection, and then publish the connection.

1. Open the **MarketoConnectionLead** connection.
2. From the **Type** list, select **Marketo**.
3. From the **Run On** list, select **Cloud Server or any Secure Agent**.
4. In the **Connection Properties** section, enter values for the following properties:

Property	Description
hostName	The munchkin ID of the Marketo instance.
client_id	The Marketo client ID to generate a valid access token. You can find the client ID under the Admin > Integration > Launchpoint menu in Marketo.
client_secret	The Marketo client secret that you generated under the Admin > Integration > Launchpoint menu in Marketo.
grant_type	The grant type that is used by the Marketo instance to get an access token for authorizing third-party clients. Enter the value as client_credentials .

5. Save and publish the connection.

Step 4: Configure and publish the process

Configure the allowed user or group for authorization, and publish the process.

1. Open the **Synchronize Dynamics 365 Contact with Marketo Lead** process.
2. On the **Start** tab of the Start step, in the **Allowed Users** or **Allowed Groups** field, enter the user or group that must have access to the process service URL at run time.
3. Save and publish the process.

Step 5: Invoke the process

When you invoke the Synchronize Dynamics 365 Contact with Marketo Lead process, the process synchronizes a Dynamics 365 contact with a Marketo lead based on a webhook request from Dynamics 365.

1. Open the **Synchronize Dynamics 365 Contact with Marketo Lead** process and click **Actions > Properties Details > Copy Service URL**.
2. Open a text editor and add the input fields and values to the service URL as shown in the following format:

```
<Cloud Application Integration POD URL>/active-bpel/public/rt/<API_name>?
webhookRequest=<Webhook request from Dynamics 365>
```

3. Open a browser and paste the service URL.

You can also invoke the process using the Run Using option, REST or SOAP API endpoints in any API client, such as cURL, Postman, SOAP UI, or through any programming language.

You must copy the service URL to the webhook configuration in [“Prerequisite for creating a webhook in Dynamics 365” on page 6](#) tool. The process will be triggered automatically when a contact is created or updated in Dynamics 365.

Step 6: Test data synchronization from Dynamics 365 contacts to Marketo leads

When you invoke the Synchronize Dynamics 365 Contact with Marketo Lead process, the process synchronizes a Dynamics 365 contact with a Marketo lead based on a webhook request from Dynamics 365 without manual intervention.

The following table shows the fields that are synchronized between the Dynamics 365 contact and Marketo lead:

Dynamics 365 Contact	Marketo Lead
Email	Email
First Name	First Name
Last Name	Last Name
Phone	Phone
Fax	Fax
Mobile Phone	Mobile Phone
Address	Address
City	City
State	State
Country	Country
Zip Code	Postal Code
Description	Person Notes
Job Title	Job Title

The following table shows the fields that are synchronized between the Dynamics 365 account and Marketo company:

Dynamics 365 Account	Marketo Company
Name	Company
Address	Billing Address
City	Billing City
State	Billing State
Country	Billing Country
Zip Code	Billing Code
Phone	Main Phone
SIC	SIC
Description	Company Notes
Annual Revenue	Annual Revenue
Number of Employees	Num Employees
Website	Website