

How to create a Marketo pipeline

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Marketo is Software-as-a-Service (SaaS)-based marketing automation software owned by Adobe and built to **help organizations automate and measure marketing engagement, tasks, and workflows**.

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1. Introduction

This guide provides detailed instructions on integrating Marketo with Digioh, focusing on automating the creation or updating of leads from Digioh into Marketo.

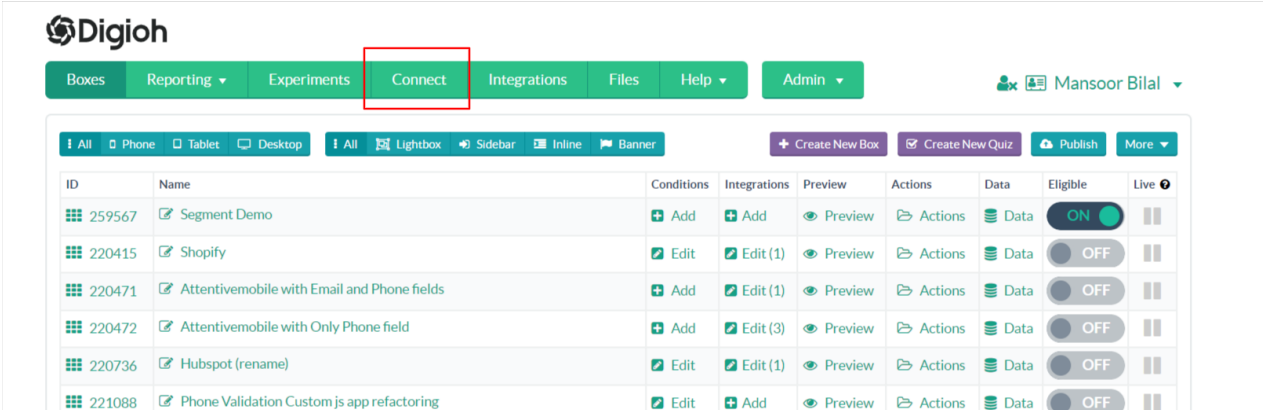
2. Prerequisites

- Marketo account with API access
- Digioh account with permissions for setup

3. Step-by-Step Integration Guide

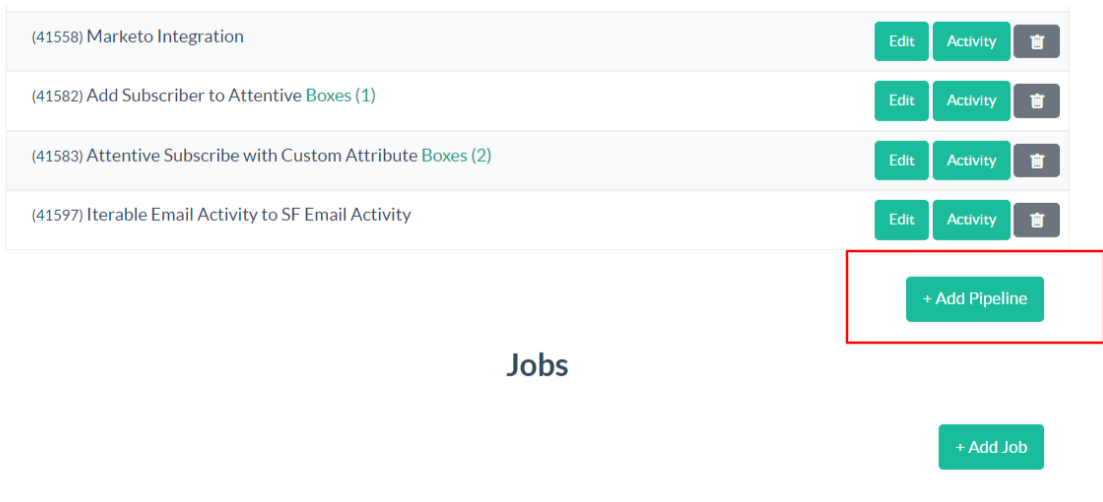
Step 1: Create the Pipeline

Log into Digioh, navigate to 'Integrations', and select 'Create Pipeline'.



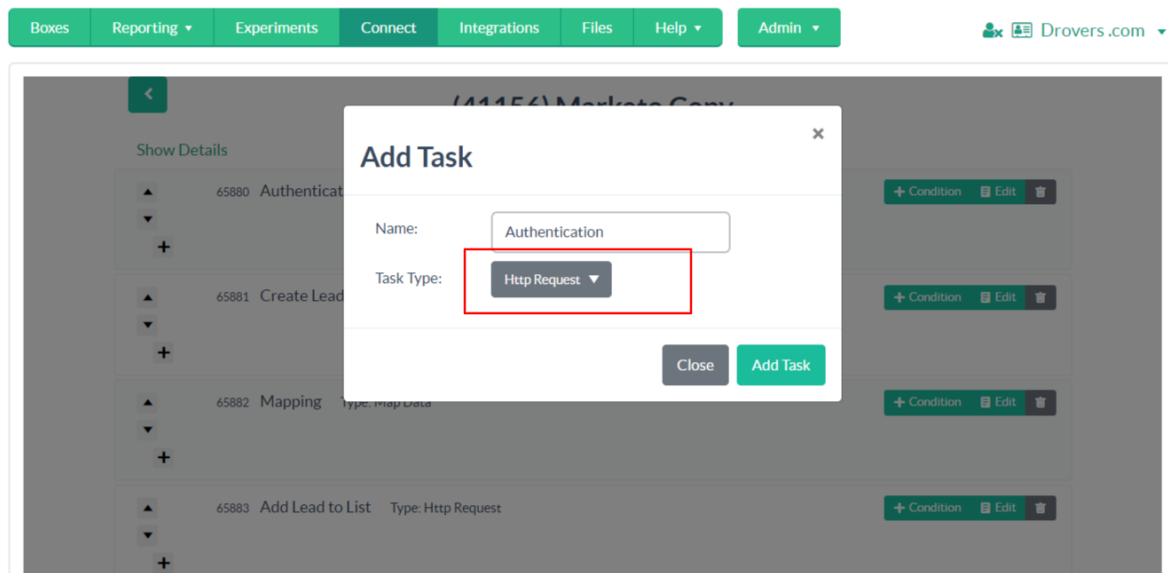
The screenshot shows the Digioh dashboard interface. At the top, there is a navigation bar with several menu items: 'Boxes', 'Reporting', 'Experiments', 'Connect', 'Integrations', 'Files', 'Help', and 'Admin'. The 'Connect' menu item is highlighted with a red rectangular box. Below the navigation bar, there is a secondary bar with options like 'All', 'Phone', 'Tablet', 'Desktop', and 'Lightbox', 'Sidebar', 'Inline', 'Banner'. The main content area displays a table of integration configurations. The table has columns for ID, Name, Conditions, Integrations, Preview, Actions, Data, Eligible, and Live. The 'Eligible' column contains toggle switches, with the first one (for 'Segment Demo') being turned 'ON' and the others being 'OFF'.

ID	Name	Conditions	Integrations	Preview	Actions	Data	Eligible	Live
259567	Segment Demo	+ Add	+ Add	Preview	Actions	Data	ON	
220415	Shopify	Edit	Edit (1)	Preview	Actions	Data	OFF	
220471	Attentivemobile with Email and Phone fields	+ Add	Edit (1)	Preview	Actions	Data	OFF	
220472	Attentivemobile with Only Phone field	+ Add	Edit (3)	Preview	Actions	Data	OFF	
220736	Hubspot (rename)	Edit	Edit (1)	Preview	Actions	Data	OFF	
221088	Phone Validation Custom js app refactoring	Edit	+ Add	Preview	Actions	Data	OFF	



Step 2: Set Up Marketo API Authentication

- Obtain your Marketo credentials (Client ID, Client Secret, Identity URL).
- Construct and add an authentication URL in the pipeline setup:
- In the Pipeline add a new task.
 - Add Name for the task.
 - Select Task Type as Http Request.
 - Click **Add Task** Button.



In the Task Field **Request URL** add the constructed URL like below.

`https://<IdentityURL>/identity/oauth/token?grant_type=client_credentials&client_id=<ClientID>&client_secret=<ClientSecret>`

Boxes Reporting Experiments Connect Integrations Files Help Admin Drovers.com

Http Request (Authentication)

Connection: Generic Http

Request URL:

Request Method: GET

Request Body: NONE

Type:

Path to Request: Item Data

Body:

Request Body:

- After Adding the URL, Click on Save and Go Back to Pipeline Main page.

Step 3: Configure the Lead Creation Task

- Set up the lead creation or update request:

- In the Pipeline add a new task.

- Add Name for the task.
- Select Task Type as Http Request.
- Click **Add Task** Button.

Add Request URL Like Below.

Note: Add Your Marketo Identity URL <IdentityURL>

https://<IdentityURL>/rest/v1/leads.json

Step 4: Map Fields According to HTTP Request

Add the Request Body:

```
{
  "action": "createOrUpdate",
  "lookupField": "email",
  "input": [
    {
      "email": "[EMAIL]",
      "optInSource": "[OPTIN]",
      "LeadSource": "[CUSTOM_1]"
    }
  ]
}
```

Note: Update the Above payload according to your Usecase.

Http Request (Create Lead)

Connection: Generic Http
 Request URL:
 Request Method: POST
 Request Body: JSON
 Type:
 Path to Request: Item Data
 Body:
 Request Body:


```

{
  "action": "createOrUpdate",
  "lookupField": "email",
  "input": {
    "email": "[EMAIL]",
    "optInSource": "[OPTIN]",
    "LeadSource": "[CUSTOM_1]"
  }
}
    
```

Request Headers:

Key:	<input type="text" value="Authorization"/>	Value:	<input type="text" value="Bearer [TOKEN]"/>
------	--	--------	---

+ Header

Response Body: JSON_OBJECT

Type:

Parameter

Mappings:

Input:	Authentication	Replace:	<input type="text" value="[TOKEN]"/>
Field:	<input type="text" value="access_token"/>		
Input:	Item Data	Replace:	<input type="text" value="[OPTIN]"/>
Field:	<input type="text" value="form.opt_in"/>		
Input:	Item Data	Replace:	<input type="text" value="[EMAIL]"/>
Field:	<input type="text" value="form.email"/>		
Input:	Item Data	Replace:	<input type="text" value="[CUSTOM_1]"/>
Field:	<input type="text" value="form.custom_1"/>		

+ Mapping Save

Ensure correct mapping of Digioh fields to Marketo fields in the pipeline settings.

Note: If you would like to add the list in a Specific List you have to follow the Step 5 and Step 6 as well else you can jump to step 7.

Optional Step 5: Adding 10 seconds Delay for List API

Add a Delay task for Marketo List API.

We will add a 10 seconds delay to add the lead in the Marketo List as well.

- In the Pipeline add a new task.

- Add Name for the task. Like 10 Seconds Delay
- Select Task Type as **Delay**.
- Click **Add Task** Button.

Once the task is added. Edit the task and update the duration value to 00:00:10 seconds. Click Save and Go Back to Pipeline Main Page.



Advanced Edit (Delay)

Name:

Data Action: None

Config:

```
{  
  "Duration": "00:00:10",  
  "PartnerConnectionId": null,  
  "ContinueOnFailure": null,  
  "Parameters": null  
}
```

Conditions:

Save

Step 6: Add Lead to List Task

- Add a new HTTP request task with the Below Endpoint.

- Add Name for the task : Add Lead to List
- Select Task Type as **Delay**.
- Click **Add Task** Button.

Replace the List ID and Identity URL in the list addition task to correctly associate leads:

`https://<IdentityURL>/rest/v1/lists/<ListID>/leads.json`

Once All the tasks are added you have to publish the pipeline.

The screenshot shows the Digioh interface for a pipeline named "(41557) Marketo List 34148 list Copy". The pipeline is composed of the following tasks:

ID	Name	Type	Actions
68139	Authentication	Type: Http Request	+ Condition, Edit, Delete
68140	Create Lead	Type: Http Request	+ Condition, Edit, Delete
68141	Mapping	Type: Map Data	+ Condition, Edit, Delete
68142	Adding 10 seconds Delay for List API	Type: Delay	+ Condition, Edit, Delete
68143	Add Lead to List	Type: Http Request	+ Condition, Edit, Delete
68924	Delay	Type: Delay	+ Condition, Edit, Delete

At the bottom of the pipeline configuration, there are four buttons: **Publish** (highlighted with a red box), **Test**, **Activity**, and **+ Task**.

Now Assign the Pipeling to the Relevant Campaigns and Check Pipeline Activity Logs for Debugging.

4. Securing Your Integration

- Use environment variables or secure storage for API credentials.
- Regularly update your API keys and secrets.

5. Conclusion

Follow these steps to ensure a successful integration between Marketo and Digioh, streamlining your lead management processes.

If you ever need additional assistance, you can always email us via support@digioh.com and our Support Team will be happy to answer any questions you have and assist with investigating any problems you run into!
