

Step 2 of 3: Set Up Marketo Sync User in Dynamics 2015 On-Premises / 2016 Dynamics 365 On-Premises

Great job completing the previous steps. Let's keep moving through this.

Prerequisites

- [Step 1 of 3: Install the Marketo Solution - 2015 On-Premises / 2016 Dynamics 365 On-Premises](#)

What's in this article?

[Assign Sync User Role](#)

[Configure Marketo Solution](#)

[Before Proceeding to Step 3](#)

Assign Sync User Role

Assign the Marketo Sync User role only to the Marketo sync user. You don't need to assign it to any other users.

Note

This applies to Marketo version 4.0.0.14 and later. For earlier versions, all users must have the sync user role. To upgrade your Marketo, see [Upgrade the Marketo Solution for Microsoft Dynamics](#).



1. Under **Settings**, click **Security**.



2. Click **Users**.

Security

Which feature would you like to work with?



Users

Add new users. Edit information about users and deactivate user records. Manage the teams, roles, and licenses assigned to users.



Security Roles

Create new security roles. Manage and delete existing security roles for your organization.



Field Security Profiles

Manage user and team permissions to read, create, or write information in secured fields.



Positions

Add new Position. Modify the Position description.

3. You will see a list of users here. Select the dedicated Marketo Sync user or contact your [Active Directory Federation Services](#) (ADFS) administrator to create a dedicated user for Marketo.

➔ Enabled Users ▾

✓	Full Name ↑	Site	Business Unit
	FEND1301 SyncUser		FEnd1301
	First name Last name		FEnd1301
	Joe Orante		FEnd1301

4. Select the sync user. Click **Manage Roles**.

+ NEW ✎ EDIT ✉ APPROVE EMAIL ✉ REJECT EMAIL 👤 MANAGE ROLES 🏢 CHANGE BUSINESS UNIT 👤 CHANGE MANAGER ⋮

➔ Enabled Users ▾ Search for records

✓	Full Name ↑	Site	Business Unit	Title	Position	Main Phone
✓	Marketo Sync		<u>doc1501</u>			
	Ran Liu		doc1501			650-382-5252

5. Check **Marketo Sync User** and click **OK**.

Manage User Roles

What roles would you like to apply to the 1 User you have selected?

Role Name	Business Unit
<input type="checkbox"/> Delegate	doc1501
<input type="checkbox"/> Marketing Manager	doc1501
<input type="checkbox"/> Marketing Professional	doc1501
<input checked="" type="checkbox"/> Marketo Sync User	doc1501
<input type="checkbox"/> Sales Manager	doc1501
<input type="checkbox"/> Salesperson	doc1501

OK

Cancel

Tip

If you don't see the role, go back to [step 1 of 3](#) and import the solution.



Note

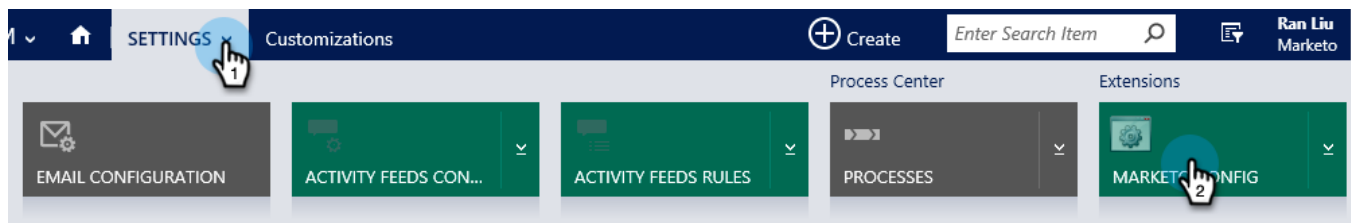
Any updates made in your CRM by the Sync User will **not** be synced back to Marketo.



Configure Marketo Solution

Almost done! We just have a few last pieces of configuration before moving onto the next article.

1. Under **Settings**, click **Marketo Config**.



Note

If Marketo Config is missing, try refreshing the page. If the issue persists, [publish the Marketo Solution again](#) or try logging out and back in.



2. Click **Default**.

→ Active Marketo Config ▾

✓ Name ↑	Created On
✓ <u>Default</u>	3/11/2015 10:23 AM





3. Click the **Marketo User** field and select the sync user.

General

Name * **Default**

Marketo User +

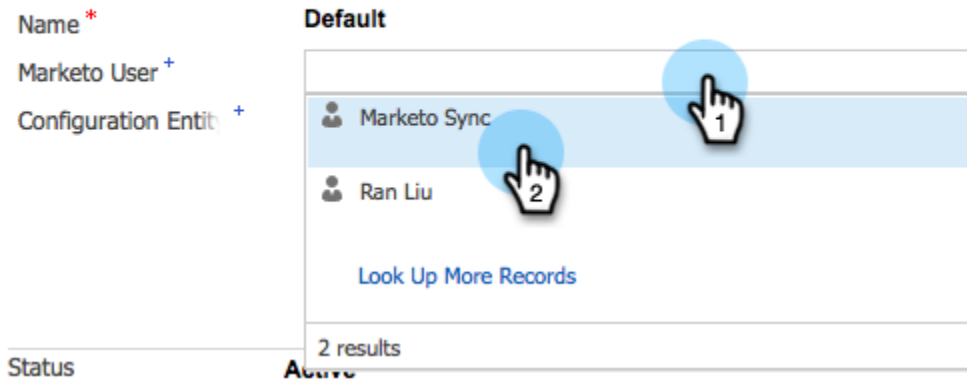
Configuration Entity +

 Marketo Sync
 Ran Liu

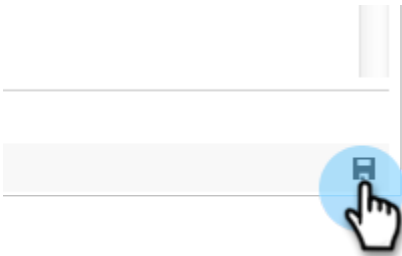
[Look Up More Records](#)

2 results

Status **Active**










4. Click the save icon in the bottom right corner.

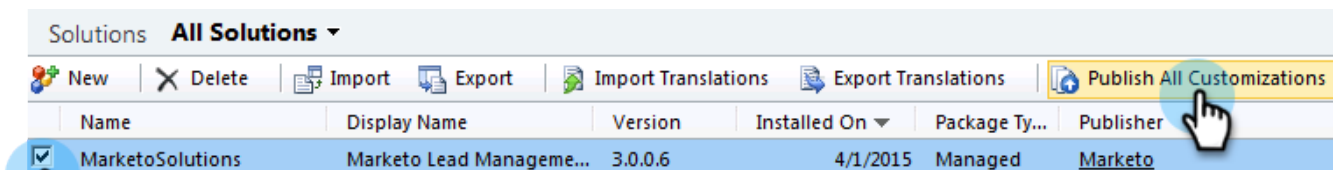


5. Click **Publish All Customizations**.

Solutions **All Solutions** ▾

 New |  Delete |  Import |  Export |  Import Translations |  Export Translations |  **Publish All Customizations**

Name	Display Name	Version	Installed On ▾	Package Ty...	Publisher
<input checked="" type="checkbox"/> MarketoSolutions	Marketo Lead Manageme...	3.0.0.6	4/1/2015	Managed	Marketo



Before Proceeding to Step 3

- If you want to restrict the number of records you sync, [set up a custom sync filter](#) now.
- Run the [Validate Microsoft Dynamics Sync](#) process. It verifies that your initial setups were done correctly.
- Log into the Marketo Sync User in Microsoft Dynamics CRM.

Related Articles

[Step 3 of 3: Connect Marketo and Dynamics 2015 On-Premises / 2016 Dynamics 365 On-Premises](#)



