

Restrict Lead Matching to a Marketo List



To reduce the number of API calls that are made during a sync, you can restrict the leads that Evergage attempts to match to a Marketo List.

This Article Explains

The first part of this article is a high level overview of the steps you need to take in Marketo to create the restriction list and provides links to Marketo documentation to support the steps. The second part of the article includes the specific process you need to take in Evergage to complete the setup.

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Marketo High-Level Process

Due to limitations in Marketo's API, the match restriction list used by Evergage must be a static list. In Marketo, a Smart Campaign can be configured to periodically update a static list's membership based on a set of rules. For example, a static list that contains only Marketo leads with email addresses could be configured as follows:

1. Log into *Marketo* as a **Marketing, Standard, Admin** user
2. Create the **Static List** that will be used as the Evergage restriction list
3. Create a **Smart Campaign**
4. On the *Static List* tab of the Smart Campaign, set the **Email Address** attribute filter to *is not empty*
5. On the *Flow* tab of the Smart Campaign, click **Add to List** then select the *Static List* you created in step 2
6. On the *Schedule* tab, set **Schedule Recurrence** to be once per day (i.e. 7 PM)
7. Click **Run Once** to verify that the list will populate

Related Marketo Documentation

- [Create a New Smart Campaign](#)
- [Use Smart List Rule Logic](#)
- [Add a Flow Step to a Smart Campaign](#)
- [Add to List](#)
- [Schedule a Recurring Batch Campaign](#)

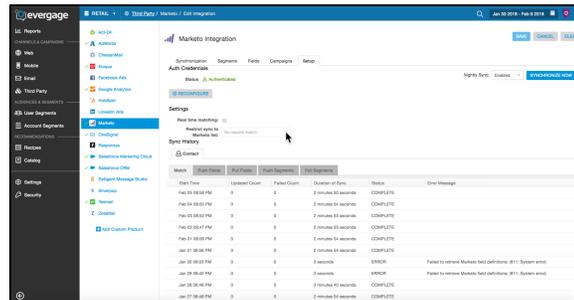
A smart campaign can also be configured to periodically update a static list's membership to match the membership of a smart list. For detailed instructions on how to do that, please refer to the Marketo documentation on [How to make a static list behave like a smart list](#).

Evergage Process

1. Log into Evergage as an administrator
2. In *Channels & Campaigns*, select **Third Party** and then *Integrations*
3. On the *Integrations* page, select **Marketo** from the list

NOTE

Once configured, selecting a third party product from the Third Party menu will bring you to the campaign list screen displaying all campaigns of that type



4. On the *Setup* tab, in the *Settings* section, select the static list you created from the **Restrict sync to Marketo list** dropdown
5. Click **Save**