MARKETO LEAD MANAGEMENT APP

INSTALLATION AND SYNCHRONIZATION WITH SALESFORCE

Installation Guide Version 1.2

CONTENTS

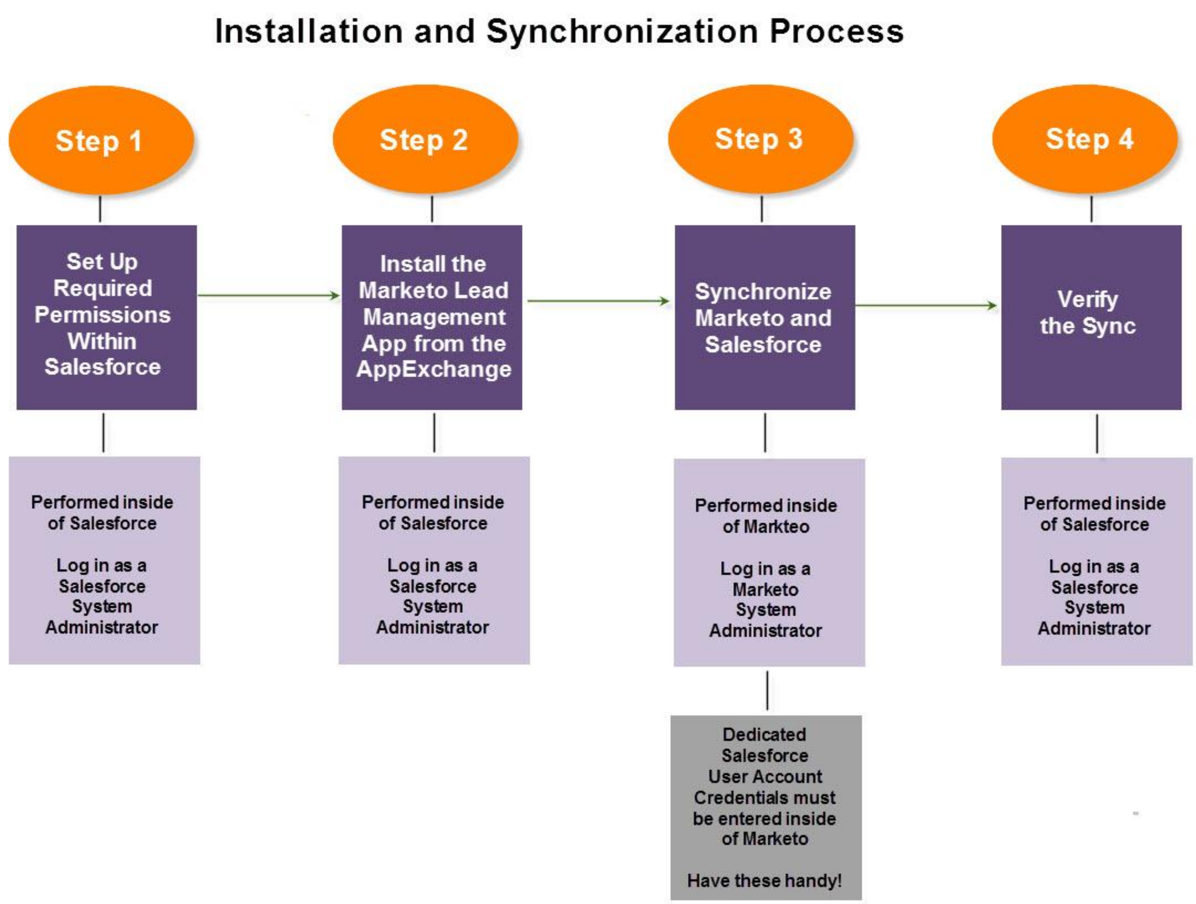
INSTALLATION AND SYNCHRONIZATION OVERVIEW

Congratulations! Your organization is now subscribing to Marketo Lead Management. Marketo Lead Management gives Marketers the power and flexibility to automate demand generation campaigns and deliver high quality leads with less effort.

Marketo's robust, bi-directional integration with Salesforce.com keeps both Marketo and Salesforce in sync all day, every day – providing marketing and sales teams with the power to drive more revenue at your company.

The Marketo Lead Management App is available from the Salesforce AppExchange. This guide will step you through installing the Marketo Lead Management App in Salesforce and initiating the data synchronization between your Salesforce instance and your Marketo instance.

Use the following chart to help you understand what system you are logging into and as what user during each part of the installation and synchronization process.



STEP 1: SET UP REQUIRED PERMISSIONS IN SALESFORCE

This section provides instructions on how to set up Salesforce permissions so you can sync with Marketo:

1. Create a Profile with Required Permissions
2. Creating a Dedicated Salesforce User Account
3. Get a Security Token
4. Block Unneeded Fields from Synchronization with Marketo

Note: You must be logged into Salesforce as a system administrator to perform the tasks in this section.

Only one Salesforce user account is used in Marketo for your entire organization, and Marketo strongly recommends that you create a dedicated Salesforce user account (e.g., *marketo@yourcompany.com*) for this purpose.

As a best practice, in Salesforce, create a new user profile with the required permissions described in the following instructions, then associate that new user profile with the dedicated user account. Independent of your company's staff, this login will help you identify any Marketo modifications to Lead and Contact records within Salesforce.

CREATE A PROFILE WITH REQUIRED PERMISSIONS

The user login used for synchronization with Marketo must have special permissions for the sync between Salesforce and Marketo to function properly.

To create a new profile with required Marketo permissions:

1. Navigate to **Setup > Administration Setup > Manage Users > Profiles**.
2. Click the **New Profile** button.
3. Create **New Profile** *(e.g. Marketo Sync)*.
4. From the **Profile Detail** page, enable the required Marketo permissions called out below.

Note: Refer to your Salesforce documentation for complete details on creating a new profile.

Caution - Salesforce Professional Edition Users only: You must add each field you want synced to Marketo to your page layout; all other fields will not be synced. If you use other editions of Salesforce, Marketo will sync down all fields that the sync account has permission to access (whether or not they're in the page layout).

From the **Profile Detail** page, perform the following for all editions of Salesforce:

1. Enable the following **Administrative Permissions**:

- API Enabled
- Manage Public Documents
- Manage Public Templates
- Edit HTML Templates
- Edit Events
- Edit Tasks
- Convert Leads

2. Enable **Read/Create/Edit/Delete** access on the following required **Standard Object Permissions**:

- Opportunities
- Contacts
- Leads
- Accounts
- Campaigns (if you choose to enable campaign sync)

3. Drill down to view and enable **Read/Write** access on the following required **Field-Level Security** objects/fields:

- Account > Type
- Event > All Standard Fields including “All Day Event”
- Task > All Standard Fields

4. Enable **Read** access on any **custom objects** that you'd like to sync with Marketo.

Caution: Marketo only supports syncing of custom objects associated with leads, contacts, and accounts.

5. For merging leads, this profile needs Edit access on all objects (standard and custom) that your Leads and Contacts use.

CREATE A DEDICATED SALESFORCE USER ACCOUNT

This dedicated Salesforce user account will be used for synchronization with Marketo and must be associated with the Marketo profile you created.

To create a new user account and assign the correct profile:

1. Navigate to **Setup > Administration Setup> Manage Users > Users**.
2. Click the **New User** button.
3. Create a clearly identifiable Salesforce user account for dedicated use with Marketo. (e.g., *marketo@yourcompany.com*).
4. From the **Profile** drop-down, select the new profile you created *(e.g. Marketo Sync).*
5. Check to enable the **Marketing User** permission.

Caution: In order to use the full features of Marketo Program to Salesforce Campaign sync, the Salesforce account used to manage Marketo Sync *must* have the **Marketing User** permission enabled on the User Detail page in Salesforce.

6. Click **Save**.

Note: Ensure you have access to and note down the username and password for the dedicated Salesforce user account. In a future step, you will also need to note down the security token for this account. This information will be needed when you launch the sync between Marketo and Salesforce.

Note: Refer to your Salesforce documentation for complete details on creating and managing users and profiles.

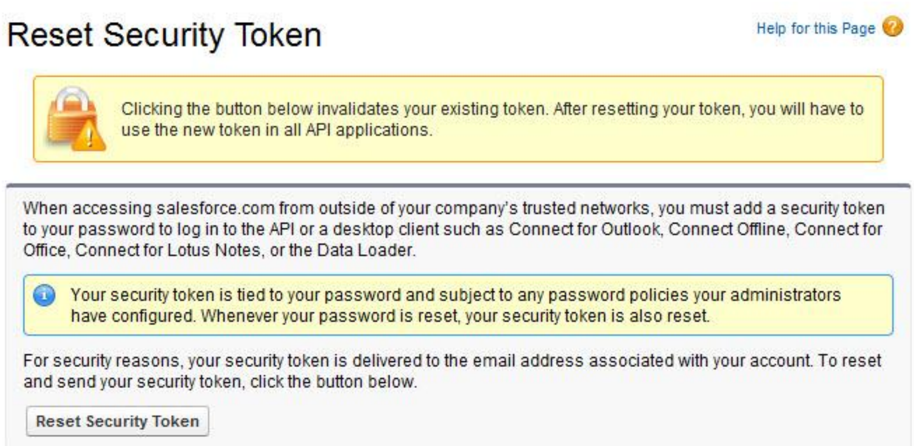
GET A SECURITY TOKEN

You need a security token to synchronize Salesforce and Marketo.

To get or reset a security token for your dedicated Salesforce user account:

1. Log in to Salesforce using the Salesforce credentials for your dedicated Salesforce user account for Marketo sync.
2. Go to **Setup > My Personal Information > Reset Your Security Token**.
3. Click the **Reset Security Token**. An email containing the security token is sent to the email address associated with this dedicated Salesforce user account.
4. Copy the token from the email. You will need to paste the **Token** into Marketo during sync.

Note: Ensure you have access to and note down the username, password, and security token for the dedicated Salesforce user account. This information is required when you launch the sync between Marketo and Salesforce.



BLOCK UNNEEDED FIELDS FROM SYNCHRONIZATION WITH MARKETO

A vast majority of fields in Salesforce are not required for marketing purposes and do not need to sync with Marketo. Prepare for synchronization with Marketo by identifying and blocking unneeded fields. Use field-level security within Salesforce to block these unneeded fields. Typically, fewer than 100 fields are required to sync between Salesforce and Marketo.

Synchronizing too many unnecessary fields can negatively impact sync performance and clutter the field hierarchy in Marketo.

Caution - The next step in the installation process creates the database structure in Marketo based on the selected fields in Salesforce. Once the database has been created, it cannot be reversed. You cannot remove fields once they are added to the database. You will only be able to add fields at a later time. Do not proceed to the next step until you have selected the fewest number of required fields for your Salesforce/Marketo sync. Start with the fewest number possible and add fields later if required.

Examples of Unneeded Fields:

- Fields that update regularly across the database should be blocked from the Marketo sync.
- The **Jigsaw** AppExchange package (Last Sync/Updated date field) gets updated frequently. This field uses a lot of bandwidth and Marketo recommends that you block it from the sync. **LinkedIn** is another you should consider blocking.
- To ensure an efficient sync with Marketo, identify and restrict certain types of records from the sync (e.g., records without an email address).

Caution - Salesforce Professional Edition Users only: Only fields in your page layouts will be synced to Marketo. Ensure all of the Salesforce fields you want in Marketo are in your page layout, and ensure the fields you don't want are absent from the layout.

STEP 2: INSTALL THE MARKETO LEAD MANAGEMENT APP FROM THE APPEXCHANGE

This section provides instructions on how to install the Marketo Lead Management App into Salesforce:

1. Install the Marketo App from AppExchange
2. Map Marketo Lead Fields to Corresponding Salesforce Contact Fields
3. **PRO:** Display Marketo Lead Fields on Salesforce Lead and Contact Detail Pages

   This PRO step is for Salesforce Professional Edition users only. If you are on a different version of Salesforce, skip this PRO step and move to the next section in this guide, *Step 3: Synchronize Marketo and Salesforce*.

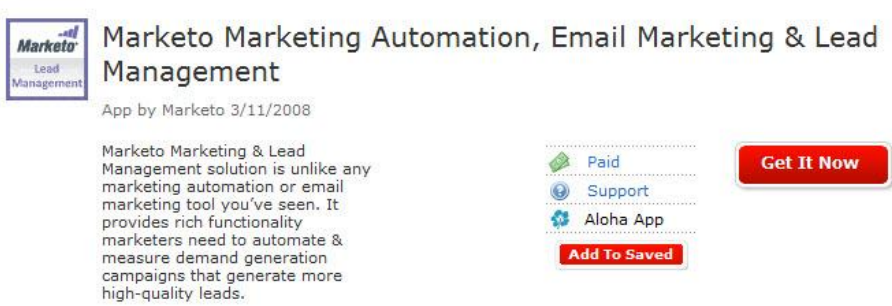
Installing the Marketo AppExchange application into Salesforce allows you to add Marketo as a tab to your Salesforce account, and place the Marketo Lead Score and Original Source fields into your Salesforce page layouts. If you've previously installed our application to get the Lead Score field, you need to reinstall the package to get the Original Source info fields.

Note: The tasks in this section must be performed by a Salesforce administrator.

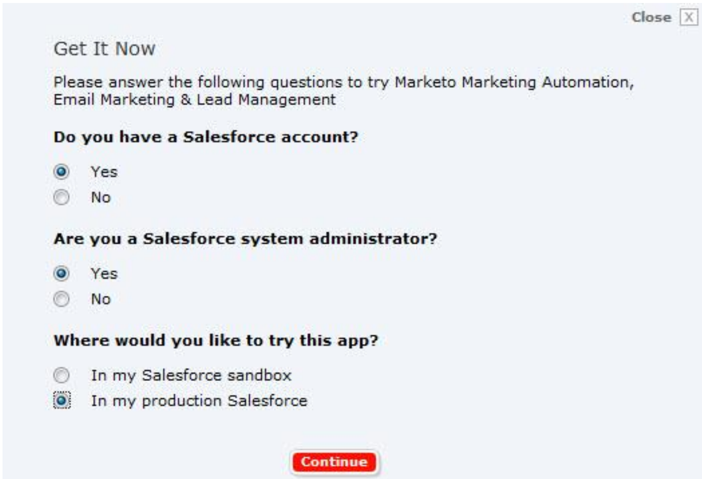
INSTALL THE MARKETO APP FROM THE APPEXCHANGE

To install the Marketo Lead Management App:

1. Go to the [Marketo App Exchange] page and click **Get it Now**.

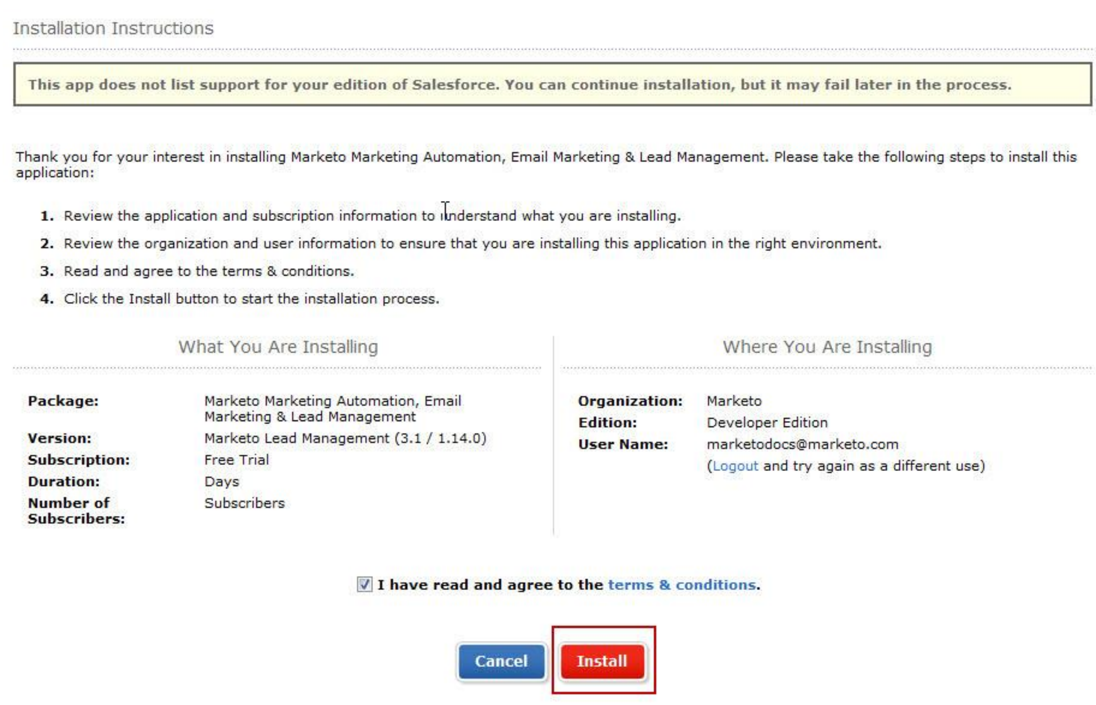


2. In the Get It Now dialog box, select **Production** or **Sandbox**, depending upon your Salesforce implementation (most likely, it will be **Production**). Click **Continue**.

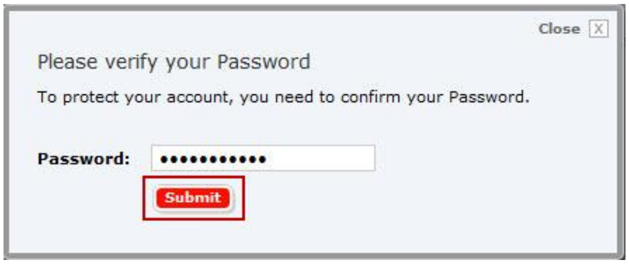


3. If prompted, to enter your Salesforce login credentials. Log in as a Salesforce administrator Do not log in as the dedicated Salesforce user for Marketo sync.

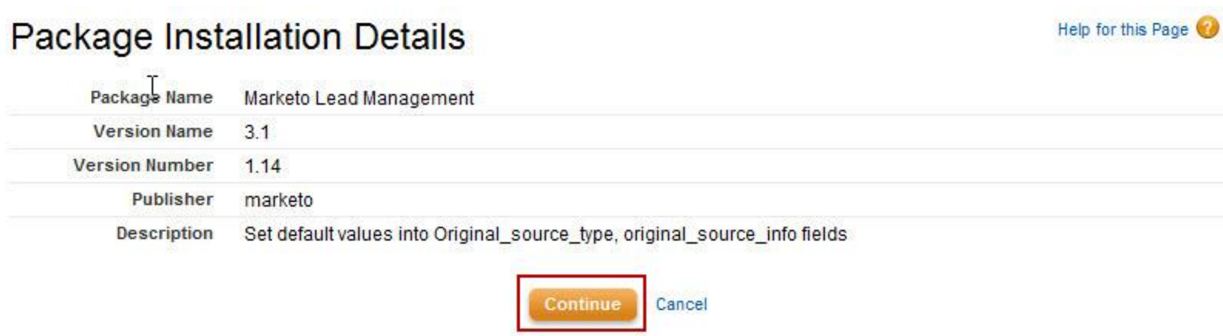
4. Read the Installation Instructions, check **I have read and agree to the terms & conditions**, then click **Install**.



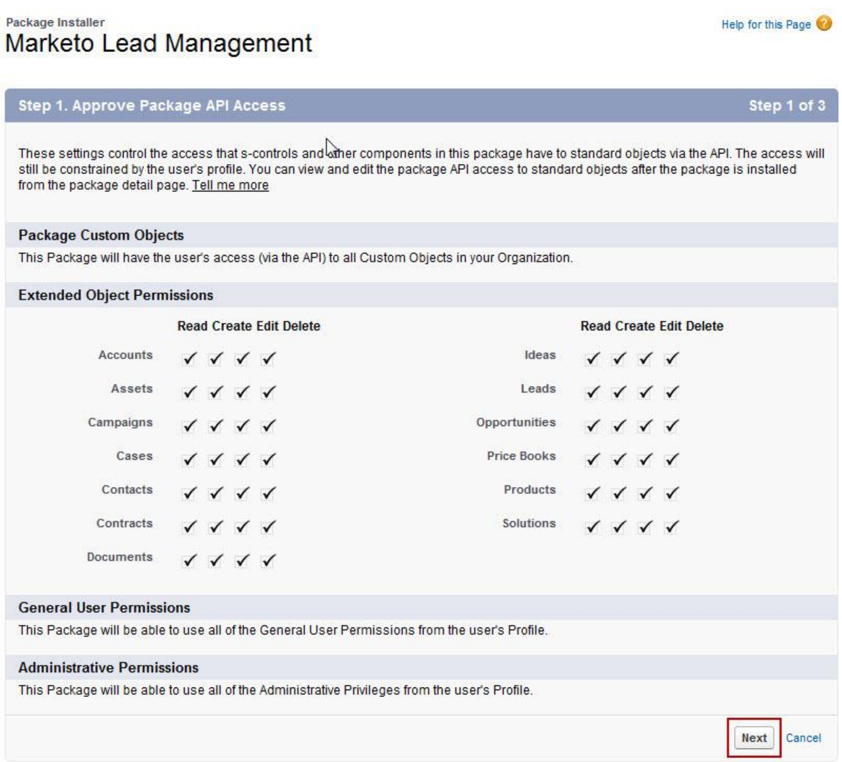
5. When prompted, re-enter your Salesforce password and click **Submit**.



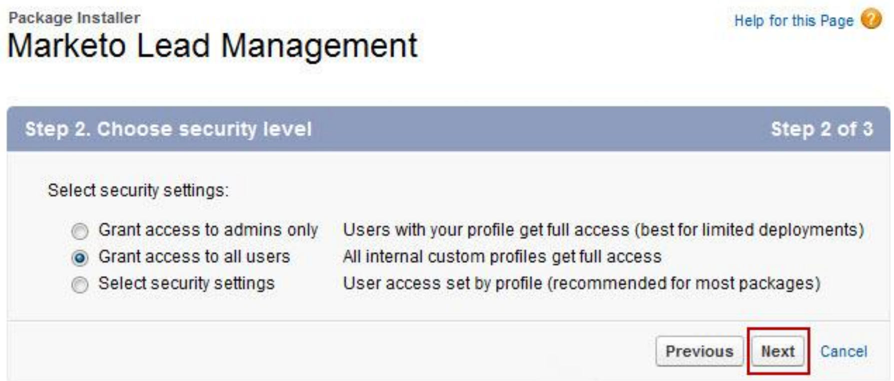
6. The Package Installation Details page displays. Click **Continue**.



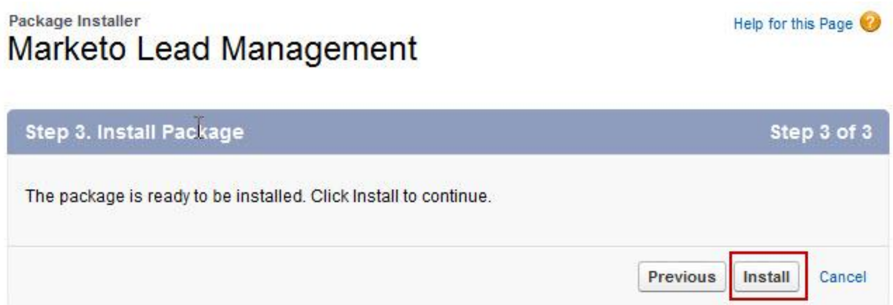
7. Click **Next** to Approve the Package API Access. This allows Marketo to sync with your Salesforce instance.



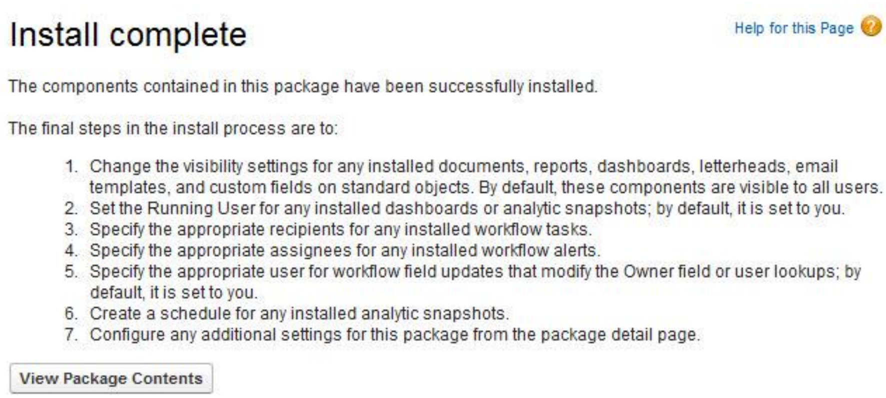
8. Select **Grant Access to All Users** and click **Next**.



9. The package is now ready to be installed. Click **Install**.



10. A confirmation message displays when the installation is complete.

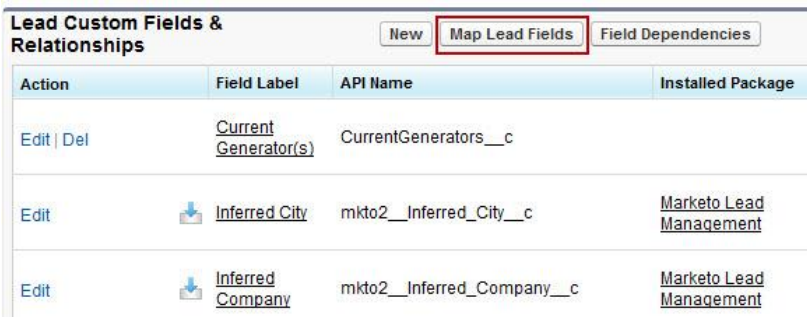


MAP MARKETO LEAD FIELDS TO CORRESPONDING SALESFORCE CONTACT FIELDS

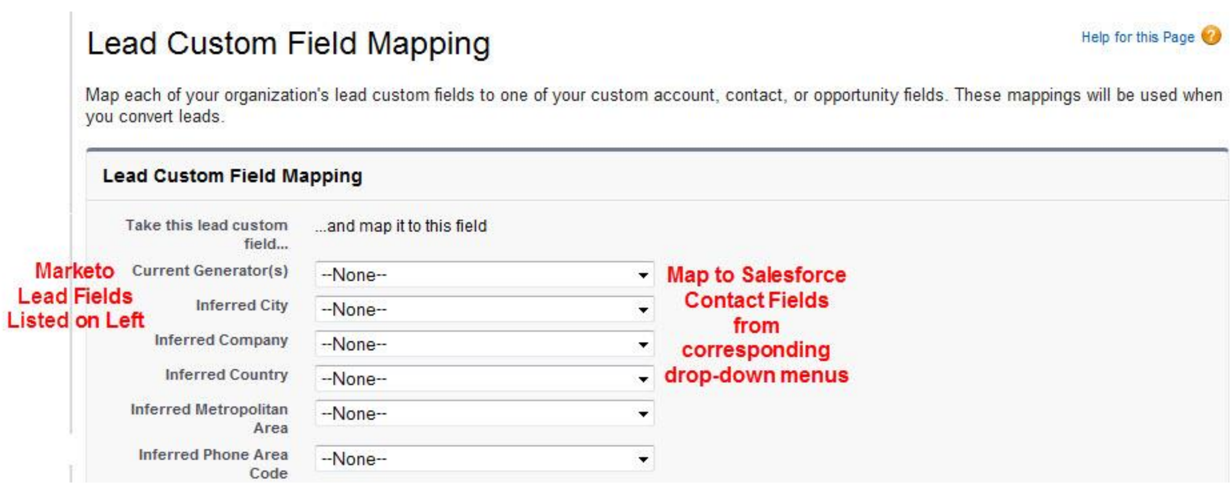
All Salesforce Leads and Contacts are considered “Leads” in Marketo. Salesforce Lead fields will automatically map over to Marketo Lead fields. However, you *must* manually map Salesforce Contact fields to corresponding Marketo Lead fields.

To map Marketo Lead fields to corresponding Salesforce Contact fields:

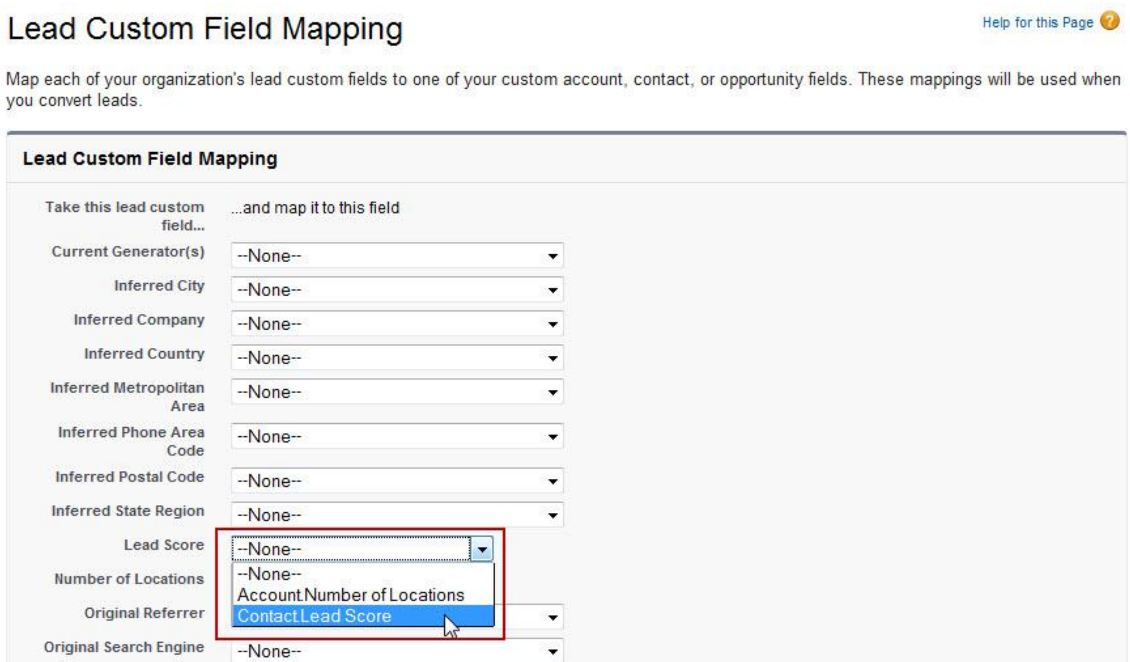
1. Navigate to **Setup > App Setup > Customize > Leads > Fields**.
2. Under **Lead Custom Fields & Relationships**, click **Map Lead Fields**. The Lead Custom Field Mapping page displays.



3. Field names listed on the left of the screen are Marketo Lead fields and you will need to map to the corresponding Salesforce Contact fields from the adjacent drop-down menus.



4. Start with the Marketo Lead Score field. Find the Marketo **Lead Score** field and select the Salesforce "**Contact Lead Score**" field from the adjacent drop-down menu.



5. Perform the same mapping process for all Original Source and Inferred fields (see required Lead fields chart below).

Marketo Lead Fields	Salesforce Contact Fields
Lead Score	Contact Lead Score
Inferred City	Contact Inferred City
Inferred Company	Contact Inferred Company
Inferred Country	Contact Inferred Country
Inferred Metropolitan Area	Contact Inferred Metropolitan Area
Inferred Phone Area Code	Contact Inferred Phone Area Code
Inferred Postal Code	Contact Inferred Postal Code
Inferred State Region	Contact Inferred State Region
Original Referrer	Contact Original Referrer
Original Search Engine	Contact Original Search Engine
Original Search Phrase	Contact Original Search Phrase
Original Source Info	Contact Original Source Info
Original Source Type	Contact Original Source Type

6. Click **Save** when you are done.

PRO: DISPLAY MARKETO LEAD FIELDS ON SALESFORCE LEAD AND CONTACT DETAIL PAGES

To display Marketo Lead fields in your Salesforce instance, add the Marketo Lead fields to the Salesforce Lead and Contact detail pages in use by your Salesforce instance.

This section steps you through the following:

1. PRO: Display Marketo Lead Fields on Salesforce Lead Detail Pages
2. PRO: Display Marketo Lead Fields on Salesforce Contact Detail Pages

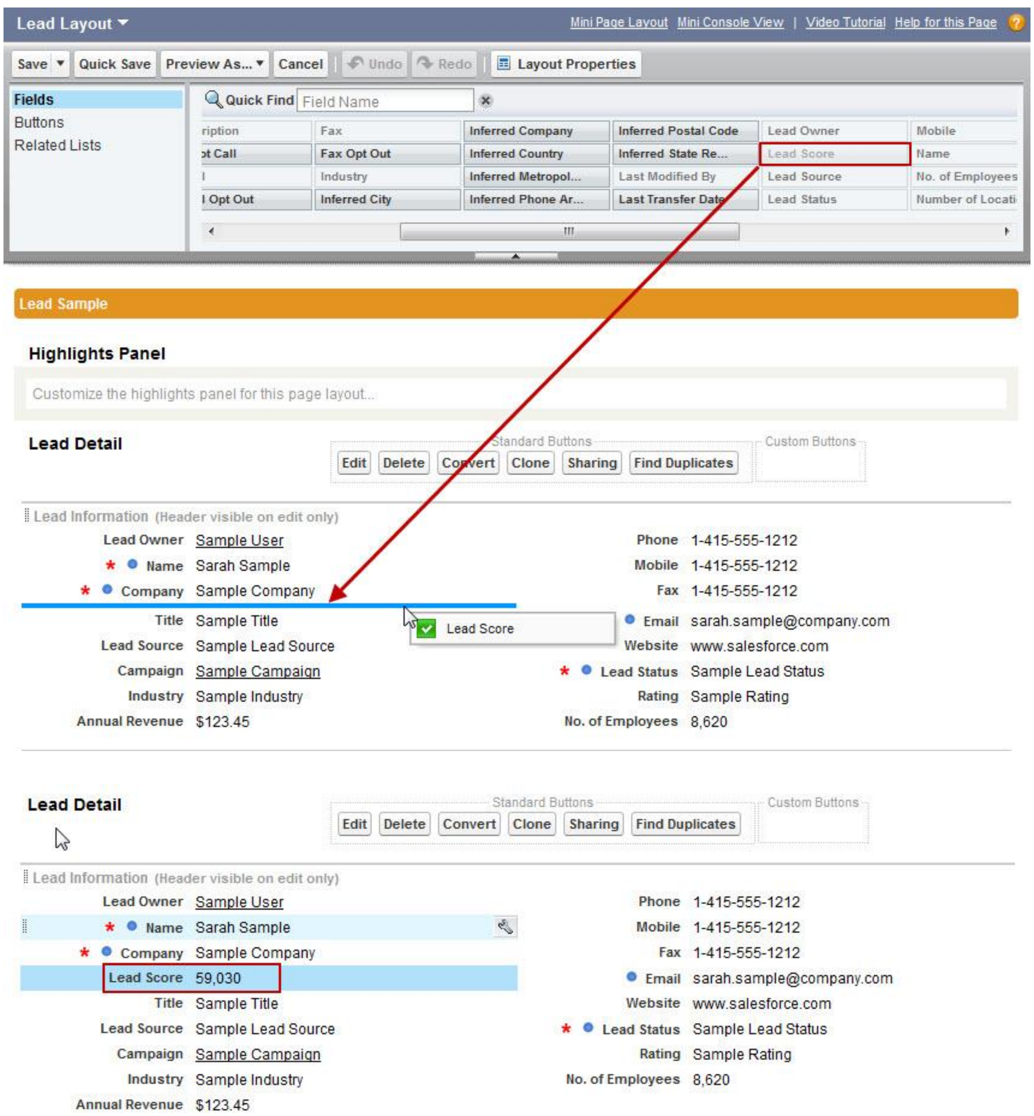
Caution - Salesforce Professional Edition Users: This is a **required** step -- all Marketo Lead fields listed in this section must be added to your Salesforce **Lead** and **Contact** page layouts in order for Marketo to update them. If you do not add these fields to your page layouts, they will not sync with Marketo.

Caution - Salesforce Enterprise or Unlimited Edition users: The Marketo Lead fields listed in this section do not need to be in your Salesforce Lead and Contact page layouts, but they must be accessible by the account you use to sync with Salesforce. If you block access to those fields via permissions, they will not sync with Marketo.

PRO: DISPLAY MARKETO LEAD FIELDS ON SALESFORCE LEAD DETAIL PAGES

Perform these steps to display Marketo Lead fields in your Salesforce Lead Detail pages:

1. Navigate to **Setup** > **App Setup** > **Customize > Leads > Page Layouts**.
2. Select the name of your page layout and click **Edit**.
3. Under the **Lead Layout** section at the top of the page, find the **Lead Score** field in the **Fields** box.
4. Drag and drop the **Lead Score** field to the location where you want it to display on the **Lead Detail** page.



5. Repeat this step with any or all of the remaining Marketo Lead fields (original source and inferred) that you want to display within your Salesforce instance.

Marketo Lead Fields:

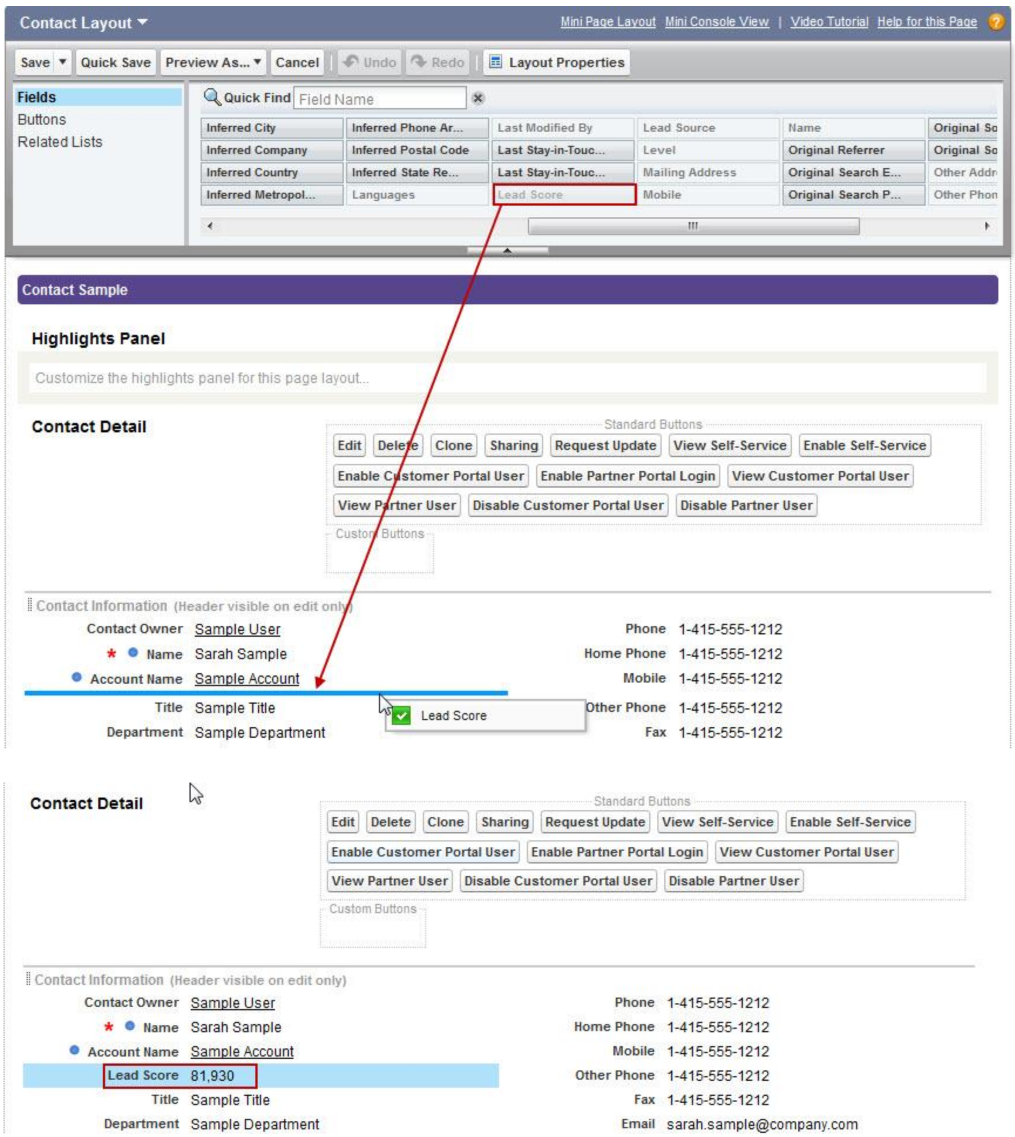
- Lead Score
- Original Search Engine
- Original Search Phrase
- Original Referrer
- Original Source Info
- Original Source Type
- Inferred City
- Inferred Company
- Inferred Country
- Inferred Metropolitan Area
- Inferred Phone Area Code
- Inferred Postal Code
- Inferred State Region

6. Click **Save** at the top of the page under Lead Layout when you are done.

PRO: DISPLAY MARKETO LEAD FIELDS ON SALESFORCE CONTACT DETAIL PAGES

Perform these steps to display Marketo Lead fields in your Salesforce Contact Detail pages:

1. Navigate to **Setup** > **App Setup** > **Customize > Contacts > Page Layouts**.
2. Select the name of your page layout and click **Edit**.
3. Under the **Contact Layout** section at the top of the page, find the **Lead Score** field in the **Fields** box.
4. Drag and drop the **Lead Score** field to the location where you want it to display on the **Contact Detail** page.



5. Repeat this step with any or all of the remaining Marketo Lead fields (original source and inferred) that you want to display within your Salesforce instance.

Marketo Lead Fields:

- Lead Score
- Original Search Engine
- Original Search Phrase
- Original Referrer
- Original Source Info
- Original Source Type
- Inferred City
- Inferred Company
- Inferred Country
- Inferred Metropolitan Area
- Inferred Phone Area Code
- Inferred Postal Code
- Inferred State Region

6. Click **Save** at the top of the page under Contact Layout when you are done.

STEP 3: SYNCHRONIZE MARKETO AND SALESFORCE

Marketo's robust, bi-directional integration with Salesforce.com keeps both Marketo and Salesforce in sync all day, every day.

When you launch and run the sync, Marketo pulls down a copy of your Salesforce database, including objects and custom fields. No changes to the data are made during the initial synchronization. Marketo simply pulls down a copy of your Salesforce database.

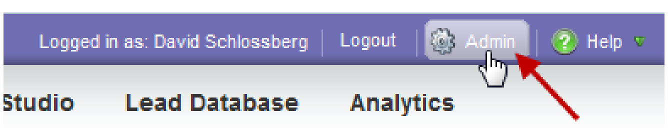
The time required to complete the initial synchronization between Salesforce and Marketo depends on the size of your database. If you have a large database, the initial sync can take all day. Once the initial sync is complete, Marketo maintains the sync with your Salesforce instance with 5 minute intervals between syncs.

If you need help at any point during the synchronization process, please contact Marketo at support@marketo.com.

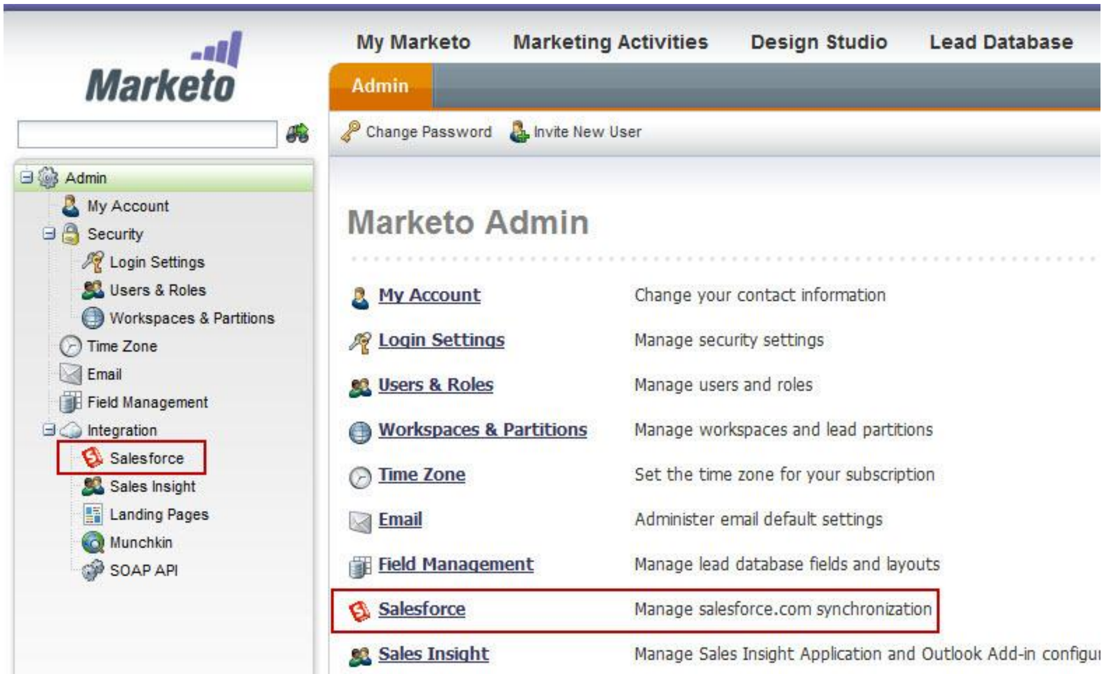
Caution: When you synchronize Marketo and Salesforce, you are establishing a unique and forever relationship between "one" Salesforce instance (subscription account) with "one" Marketo instance (subscription account). **Once you start the sync, you can associate another user login with the sync, but you cannot sync to a separate Salesforce instance, and you cannot change the Sandbox flag**.

To synchronize your Salesforce and Marketo instances:

1. Log in to your Marketo instance as a Marketo administrator.
2. Click the **Admin** link at the top of the Marketo UI. You must have Administrator permissions to access this link.



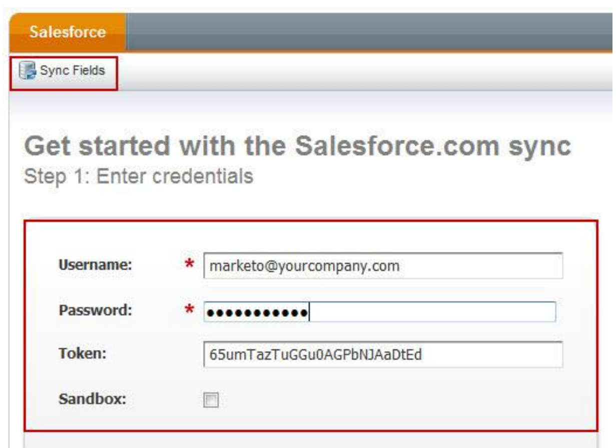
3. Click **Salesforce** in the tree on the left or on the canvas.



4. Enter the credentials for the **dedicated Salesforce user account** you created for synchronization with Marketo: **Username**, **Password**, and **Security Token** (see *Step 1: Set Up Required Permissions in Salesforce*).

Note: If you need to reset the security token for the dedicated Salesforce user account, see *Get a Security Token* .

Caution: Check the **Sandbox** option only if you are syncing a Marketo Sandbox to a Salesforce Sandbox. If you are syncing to a Production environment, **do not check Sandbox**. If you're unsure about this step, please contact your Marketo customer enablement manager.

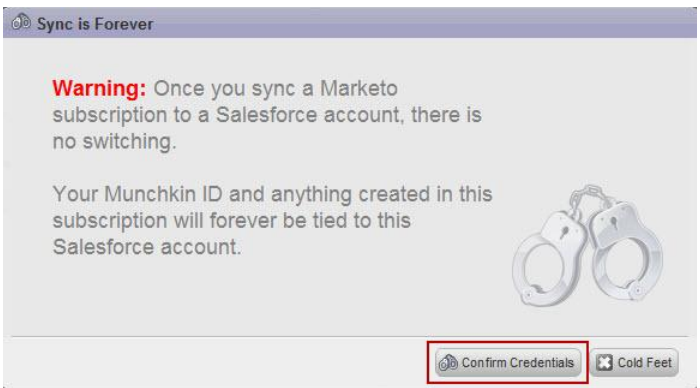


5. Click **Sync Fields**.

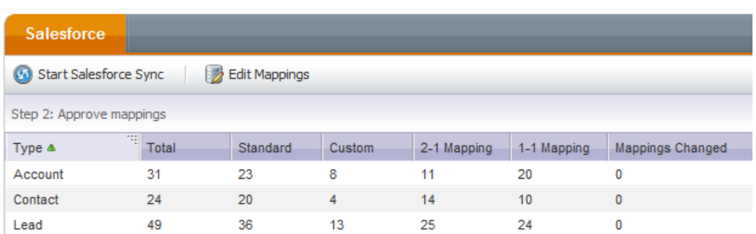
6. The **Sync is Forever** Warning dialog box displays. **This is a critical step.**

What should you click?

- **Cold Feet**: Once you start the sync, you can associate another user login with the sync, but **you *cannot* sync to a separate Salesforce instance, and you cannot change the Sandbox flag**. If you are unsure, click Cold Feet and verify the correct credentials are entered in the previous screen.
- **Confirm Credentials**: Click Confirm Credentials *only if* you are sure the correct credentials for syncing the proper Marketo and Salesforce instances have been entered. When you synchronize Marketo and Salesforce, you are establishing a unique and forever relationship between "one" Salesforce instance (subscription account) with "one" Marketo instance (subscription account).



7. At this point, Marketo pulls down the lead and contact fields you enabled for sync from Salesforce.



Type	Total	Standard	Custom	2-1 Mapping	1-1 Mapping	Mappings Changed
Account	31	23	8	11	20	0
Contact	24	20	4	14	10	0
Lead	49	36	13	25	24	0

Caution: Your sync is not yet complete. You must continue with the remaining steps to complete the sync.

8. Verify the field mappings in one of two ways:

- **Automatic Field Mapping:** Marketo automatically maps fields when they are named the same.

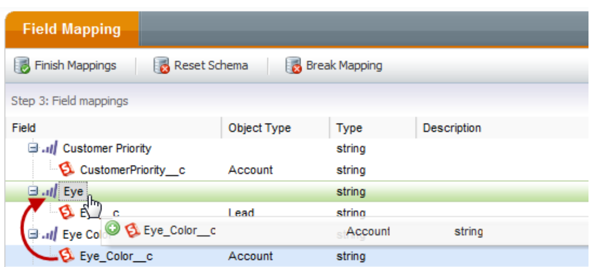
  Example: If you have a custom field called "Eye Color" on a lead and one called "Eye Color" on a contact, Marketo will create one field called "Eye Color" shared by leads and contacts. This will allow you to search for matching leads and contacts at the same time.

  If you want to use automatic field mapping, move to Step 9.

- **Edit Custom Field Mapping:** You cannot remap the built-in fields, but you can remap the custom fields.

  Example: If your fields are named "Eye" on a lead and "Eye Color" on a contact, you'll need to manually map those together.

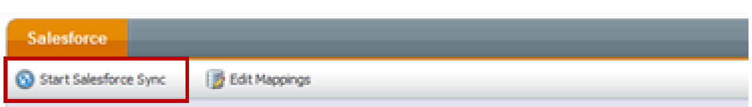
  - If so, click **Edit Mappings.** You'll see a list of mapped and unmapped Salesforce and Marketo fields.
  - To remap a custom field, drag the Salesforce field (with the Salesforce icon) onto the Marketo field (with the Marketo icon) you want to map it to.



  - To unmap the fields, select the field and click **Break Mapping**.
  - To reset your mapping or rescan your Salesforce fields for changes, click **Reset Schema**.
  - When you're done, click **Finish Mappings**.

  Once you are done editing your custom field mappings, move to Step 9.

9. Click **Start Salesforce Sync** to being importing your Salesforce date into Marketo. You can continue to use Marketo while the sync is in process. When it's finished, you'll see a summary.



STEP 4: VERIFY THE SYNC

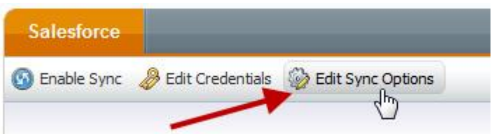
To verify the synchronization between Salesforce and Marketo was successful:

1. Log into your Salesforce account.
2. Review your Lead Detail and Contact Detail pages.
3. If the Marketo Lead fields display on your Salesforce Lead Detail and Contact Detail pages, the sync was a success!

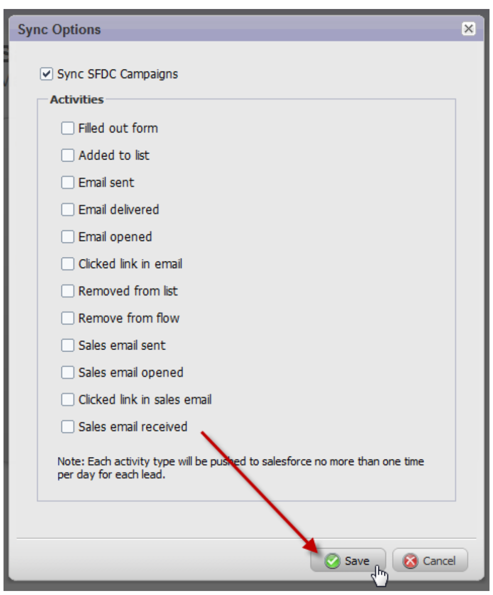
OPTIONAL STEPS (SYNC ACTIVITIES)

You have the option of pushing certain Marketo events to Salesforce.com. When these activities happen in Marketo, a Salesforce Activity History record is created for that lead or contact.

To access these settings, click the **Edit Sync Options** button.



1. Check the boxes for the fields you want to push to Salesforce.com. Click **Save** when you're done.
2. Additionally, you can check **Sync SFDC Campaigns**. If you use SFDC Campaigns, you will probably want to enable this sync.



Each activity type is pushed to Salesforce no more than once per day for each lead. This is to reduce noise for your sales reps and to keep storage use down. If you're interested in getting more Marketo information into Salesforce, check out our [Marketo Sales Insight](#) product.

The ones in **bold** are ones that Marketo uses in our own account:

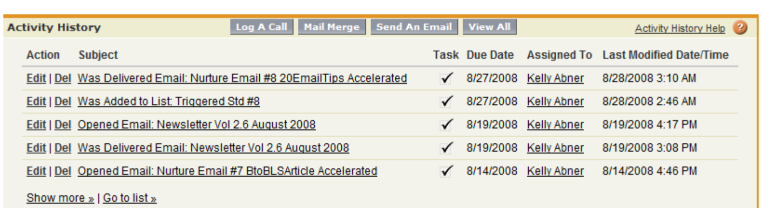
Activity Type	Description
Filled out form	The lead filled out any Marketo form
Added to list	The lead was added to a static list
Email sent	The lead was sent an email
Email delivered	The lead received an email
Email opened	The lead opened the email for viewing
Clicked link in email	The lead clicked on a link in an email sent by Marketo
Removed from list	The lead was removed from a static list
Remove from flow	The lead no longer proceeds through a campaign's flow
Sales email sent	The lead was sent an email sent through Marketo Sales Insight
Sales email opened	The lead opened an email sent through Marketo Sales Insight
Clicked link in sales email	The lead clicked a link in an email sent through Marketo Sales Insight
Sales email received	The lead received an email sent through Marketo Sales Insight

Note: Email opened is a poor metric to use because email clients often block images. We suggest you use **Clicked link in email** as a better indicator of interest.

What about other activities?

Enable **Add to List** notification in SFDC. When leads trigger the activity of interest, add those leads to the static list; the **Add to List** event will be created as a task. This is useful for complex activity criteria.

Events that you push to Salesforce appear in the Activity History for the lead or contact like this:



Please contact your Salesforce administrator for assistance with Salesforce, or contact Marketo if you encounter any errors or need additional help using the Marketo application.

For the latest and more information, visit the [Marketo Customer Community](). To give feedback on this User Guide, please send comments to [education@marketo.com]().