



MARKETO LEAD MANAGEMENT APP

INSTALLATION AND SYNCHRONIZATION WITH SALESFORCE

Installation Guide Version 1.2





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INSTALLATION AND SYNCHRONIZATION OVERVIEW

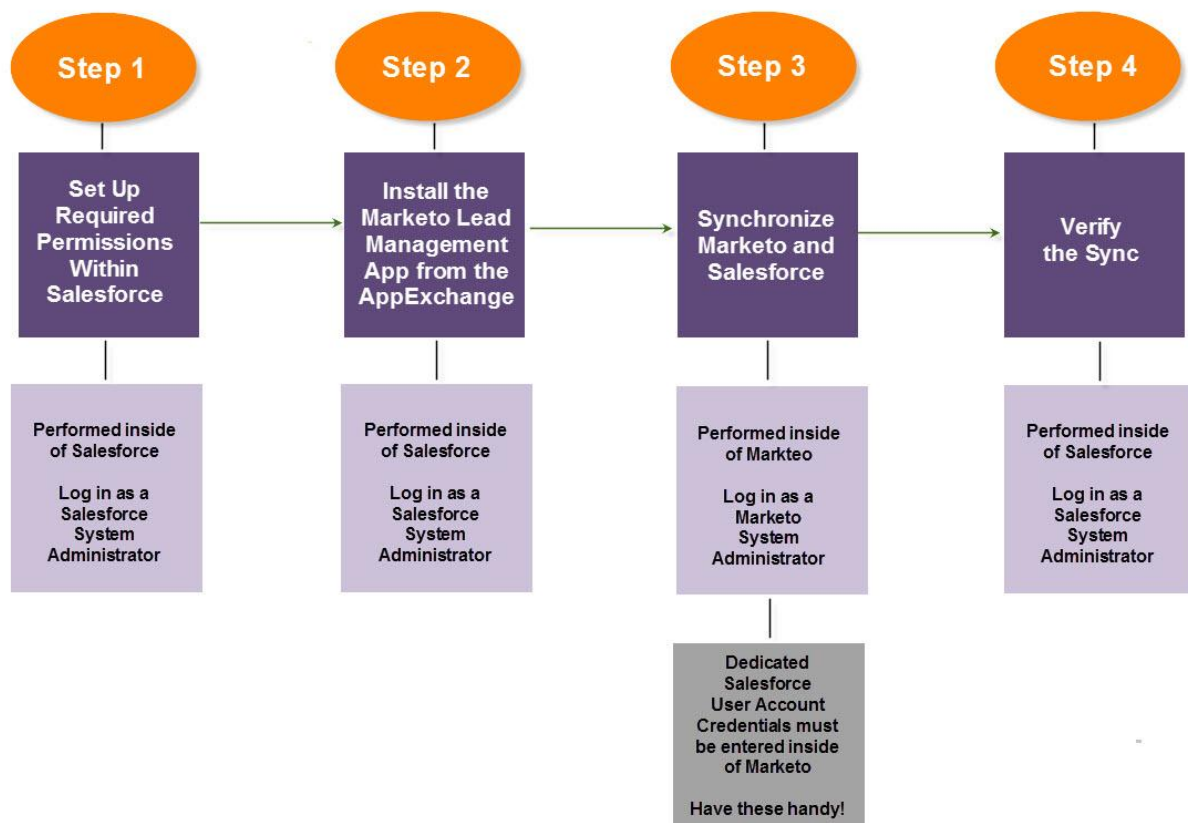
Congratulations! Your organization is now subscribing to Marketo Lead Management. Marketo Lead Management gives Marketers the power and flexibility to automate demand generation campaigns and deliver high quality leads with less effort.

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.

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.

REQUIRED PROFILE PERMISSIONS FOR MARKETO SYNCHRONIZATION



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. *Marketeto 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.


Reset Security Token

[Help for this Page](#) 



Clicking the button below invalidates your existing token. After resetting your token, you will have to use the new token in all API applications.

When accessing salesforce.com from outside of your company's trusted networks, you must add a security token to your password to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.

 Your security token is tied to your password and subject to any password policies your administrators have configured. Whenever your password is reset, your security token is also reset.

For security reasons, your security token is delivered to the email address associated with your account. To reset and send your security token, click the button below.

[Reset Security Token](#)



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:

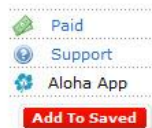
1. Go to the [Marketo App Exchange](#) page and click **Get it Now**.



Marketo Marketing Automation, Email Marketing & Lead Management

App by Marketo 3/11/2008

Marketo Marketing & Lead Management solution is unlike any marketing automation or email marketing tool you've seen. It provides rich functionality marketers need to automate & measure demand generation campaigns that generate more high-quality leads.





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**.

Get It Now Close X

Please answer the following questions to try Marketo Marketing Automation, Email Marketing & Lead Management

Do you have a Salesforce account?

Yes
 No

Are you a Salesforce system administrator?

Yes
 No

Where would you like to try this app?

In my Salesforce sandbox
 In my production Salesforce

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**.

Installation Instructions

This app does not list support for your edition of Salesforce. You can continue installation, but it may fail later in the process.

Thank you for your interest in installing Marketo Marketing Automation, Email Marketing & Lead Management. Please take the following steps to install this application:

1. Review the application and subscription information to understand what you are installing.
2. Review the organization and user information to ensure that you are installing this application in the right environment.
3. Read and agree to the terms & conditions.
4. Click the Install button to start the installation process.

What You Are Installing	Where You Are Installing
Package: Marketo Marketing Automation, Email Marketing & Lead Management	Organization: Marketo
Version: Marketo Lead Management (3.1 / 1.14.0)	Edition: Developer Edition
Subscription: Free Trial	User Name: marketodocs@marketo.com
Duration: Days	(Logout and try again as a different use)
Number of Subscribers: Subscribers	

I have read and agree to the terms & conditions.

Cancel **Install**



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

Close X

Please verify your Password

To protect your account, you need to confirm your Password.

Password:

Submit

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

Package Installation Details

[Help for this Page](#) ?

Package Name	Marketo Lead Management
Version Name	3.1
Version Number	1.14
Publisher	marketo
Description	Set default values into Original_source_type, original_source_info fields

Continue [Cancel](#)

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

Package Installer [Help for this Page](#) ?

Marketo Lead Management

Step 1. Approve Package API AccessStep 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects
This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓	Ideas	✓	✓	✓	✓
Assets	✓	✓	✓	✓	Leads	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓	Opportunities	✓	✓	✓	✓
Cases	✓	✓	✓	✓	Price Books	✓	✓	✓	✓
Contacts	✓	✓	✓	✓	Products	✓	✓	✓	✓
Contracts	✓	✓	✓	✓	Solutions	✓	✓	✓	✓
Documents	✓	✓	✓	✓					

General User Permissions
This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions
This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next [Cancel](#)



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

Package Installer Help for this Page ?

Marketeto Lead Management

Step 2. Choose security levelStep 2 of 3

Select security settings:

<input type="radio"/> Grant access to admins only	Users with your profile get full access (best for limited deployments)
<input checked="" type="radio"/> Grant access to all users	All internal custom profiles get full access
<input type="radio"/> Select security settings	User access set by profile (recommended for most packages)

Previous Next Cancel

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

Package Installer Help for this Page ?

Marketeto Lead Management

Step 3. Install PackageStep 3 of 3

The package is ready to be installed. Click Install to continue.

Previous Install Cancel

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

Install complete Help for this Page ?

The components contained in this package have been successfully installed.

The final steps in the install process are to:

1. Change the visibility settings for any installed documents, reports, dashboards, letterheads, email templates, and custom fields on standard objects. By default, these components are visible to all users.
2. Set the Running User for any installed dashboards or analytic snapshots; by default, it is set to you.
3. Specify the appropriate recipients for any installed workflow tasks.
4. Specify the appropriate assignees for any installed workflow alerts.
5. Specify the appropriate user for workflow field updates that modify the Owner field or user lookups; by default, it is set to you.
6. Create a schedule for any installed analytic snapshots.
7. Configure any additional settings for this package from the package detail page.

View Package Contents

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.

Lead Custom Fields & Relationships			
		New	Map Lead Fields
		Field Dependencies	
Action	Field Label	API Name	Installed Package
Edit Del	Current Generator(s)	CurrentGenerators__c	
Edit	Inferred City	mkt02__Inferred_City__c	Marketo Lead Management
Edit	Inferred Company	mkt02__Inferred_Company__c	Marketo Lead Management

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.

Lead Custom Field Mapping

[Help for this Page](#)

Map each of your organization's lead custom fields to one of your custom account, contact, or opportunity fields. These mappings will be used when you convert leads.

Take this lead custom field...	...and map it to this field	
Current Generator(s)	--None--	Map to Salesforce Contact Fields from corresponding drop-down menus
Inferred City	--None--	
Inferred Company	--None--	
Inferred Country	--None--	
Inferred Metropolitan Area	--None--	
Inferred Phone Area Code	--None--	



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.

Lead Custom Field Mapping

[Help for this Page](#)

Map each of your organization's lead custom fields to one of your custom account, contact, or opportunity fields. These mappings will be used when you convert leads.

Lead Custom Field Mapping

Take this lead custom field... ..and map it to this field

Current Generator(s)	--None--
Inferred City	--None--
Inferred Company	--None--
Inferred Country	--None--
Inferred Metropolitan Area	--None--
Inferred Phone Area Code	--None--
Inferred Postal Code	--None--
Inferred State Region	--None--
Lead Score	<div style="border: 1px solid red; padding: 2px;"> --None-- --None-- AccountNumber of Locations ContactLead Score </div>
Number of Locations	--None--
Original Referrer	--None--
Original Search Engine	--None--

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.

The image shows two screenshots illustrating the process of adding a Marketo field to a Salesforce page layout.

Top Screenshot: Page Layout Editor

- At the top, there are navigation links: [Mini Page Layout](#), [Mini Console View](#), [Video Tutorial](#), and [Help for this Page](#).
- Below the navigation are buttons: **Save**, **Quick Save**, **Preview As...**, **Cancel**, **Undo**, **Redo**, and **Layout Properties**.
- The **Fields** section is active, showing a list of available fields. The **Lead Score** field is highlighted with a red box.

Bottom Screenshot: Lead Detail Page

- The page layout is being edited. A red arrow points from the **Lead Score** field in the top screenshot to the **Lead Score** field being added to the **Lead Information** section of the page layout.
- The **Lead Information** section is expanded, showing various fields. The **Lead Score** field is now visible and highlighted with a red box, showing a value of **59,030**.



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.

The screenshot illustrates the process of adding a Marketo Lead Score field to a Salesforce Contact Detail page layout. It is divided into three main sections:

- Fields Selection:** At the top, the 'Fields' box in the 'Layout Properties' pane shows a list of available fields. The 'Lead Score' field is highlighted with a red box, and a red arrow points from it to the next section.
- Initial Page Layout:** The middle section shows a 'Contact Sample' page layout. Under the 'Contact Detail' section, there are standard buttons (Edit, Delete, Clone, etc.) and contact information fields (Name, Account Name, Title, Department, Phone, etc.). The 'Lead Score' field is not yet present.
- Final Page Layout:** The bottom section shows the same page layout after the 'Lead Score' field has been added. The 'Lead Score' field is now visible in the 'Contact Detail' section, displaying the value '81,930'.



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

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

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

The time required to complete the initial synchronization between Salesforce and Marketeto 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, Marketeto maintains the sync with your Salesforce instance with 5 minute intervals between syncs.

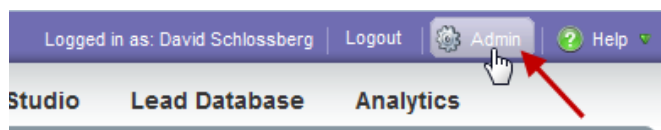
If you need help at any point during the synchronization process, please contact Marketeto at support@marketo.com.



Caution: When you synchronize Marketeto and Salesforce, you are establishing a unique and forever relationship between “one” Salesforce instance (subscription account) with “one” Marketeto 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 Marketeto instances:

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





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

The screenshot displays the Marketo Admin interface. At the top, there are navigation tabs: "My Marketo", "Marketing Activities", "Design Studio", and "Lead Database". Below these is the "Admin" section with options for "Change Password" and "Invite New User".

The left sidebar shows a tree view of the Admin menu. The "Integration" section is expanded, and "Salesforce" is highlighted with a red box. Other items in the tree include "My Account", "Security", "Login Settings", "Users & Roles", "Workspaces & Partitions", "Time Zone", "Email", "Field Management", "Sales Insight", "Landing Pages", "Munchkin", and "SOAP API".

The main content area is titled "Marketo Admin" and lists several configuration options, each with a description. The "Salesforce" option is highlighted with a red box. The options are:

- My Account**: Change your contact information
- Login Settings**: Manage security settings
- Users & Roles**: Manage users and roles
- Workspaces & Partitions**: Manage workspaces and lead partitions
- Time Zone**: Set the time zone for your subscription
- Email**: Administer email default settings
- Field Management**: Manage lead database fields and layouts
- Salesforce**: Manage salesforce.com synchronization
- Sales Insight**: Manage Sales Insight Application and Outlook Add-in configuration



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.

Salesforce

Sync Fields

Get started with the Salesforce.com sync

Step 1: Enter credentials

Username: * marketo@yourcompany.com

Password: * ●●●●●●●●

Token: 65umTazTuGGu0AGPbNJAaDtEd

Sandbox:

5. Click **Sync Fields**.

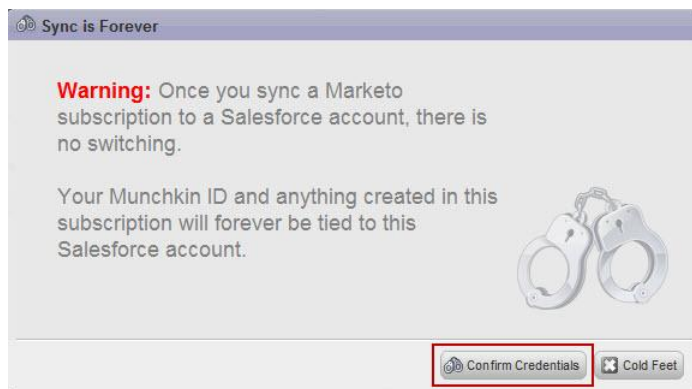
6. The **Sync is Forever** Warning dialog box displays. **This is a critical step.**



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.

Salesforce						
Start Salesforce Sync Edit Mappings						
Step 2: Approve mappings						
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.

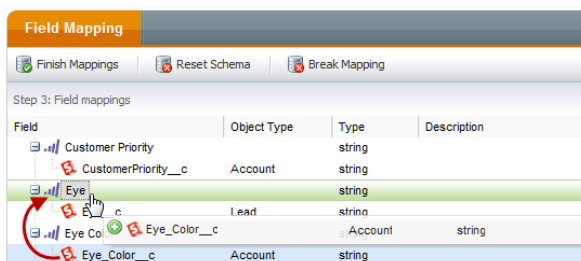
Example: If you have a custom field called "Eye Color" on a lead and one called "Eye Color" on a contact, Marketo will create one field called "Eye Color" shared by leads and contacts. This will allow you to search for matching leads and contacts at the same time.

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.

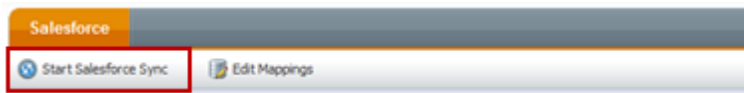
- If so, click **Edit Mappings**. You'll see a list of mapped and unmapped Salesforce and Marketo fields.
- To remap a custom field, drag the Salesforce field (with the Salesforce icon) onto the Marketo field (with the Marketo icon) you want to map it to.



- 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 begin importing your Salesforce data 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

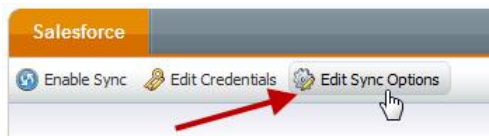
To verify the synchronization between Salesforce and Marketo was successful:

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!

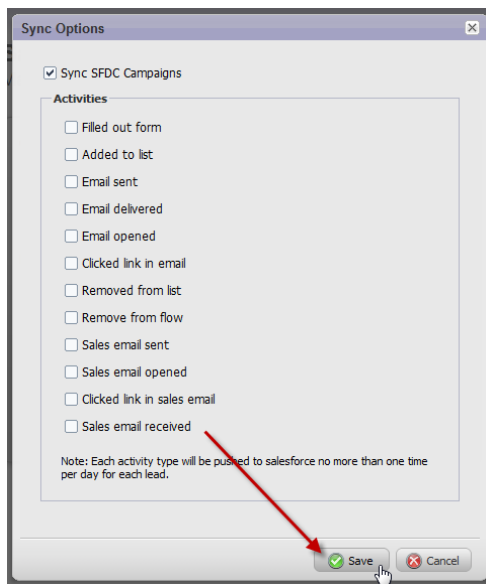
OPTIONAL STEPS (SYNC ACTIVITIES)

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:

Action	Subject	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Was Delivered Email: Nurture Email #8 20EmailTips Accelerated	✓	8/27/2008	Kelly Abner	8/28/2008 3:10 AM
Edit Del	Was Added to List_Triogered Std #8	✓	8/27/2008	Kelly Abner	8/28/2008 2:46 AM
Edit Del	Opened Email: Newsletter Vol 2.6 August 2008	✓	8/19/2008	Kelly Abner	8/19/2008 4:17 PM
Edit Del	Was Delivered Email: Newsletter Vol 2.6 August 2008	✓	8/19/2008	Kelly Abner	8/19/2008 3:08 PM
Edit Del	Opened Email: Nurture Email #7 BtoBLArticle Accelerated	✓	8/14/2008	Kelly Abner	8/14/2008 4:46 PM

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

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