Sales Engage for Salesforce Classic: Installation Guide

In this guide, you'll learn how to:

- Connect your MSE account to Salesforce
- Install MSE customization package in Salesforce
- Add MSE roll up logging fields, custom activity fields, page layout buttons & list view buttons to Salesforce
- Set up your MSE account to log information in to your Salesforce account

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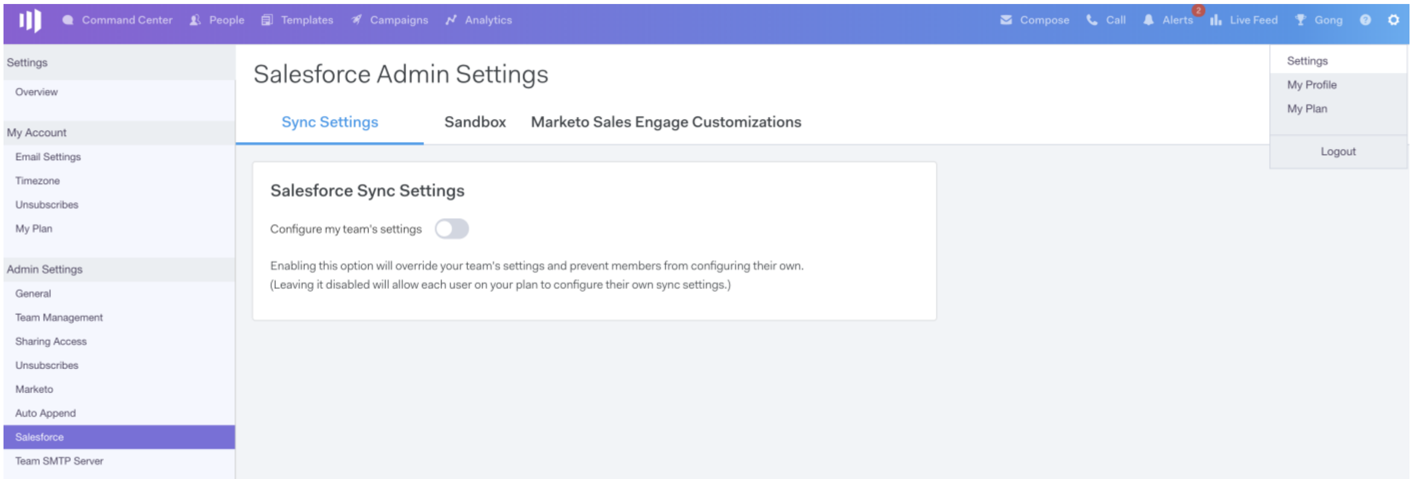
1. Connect Sales Engage to Salesforce

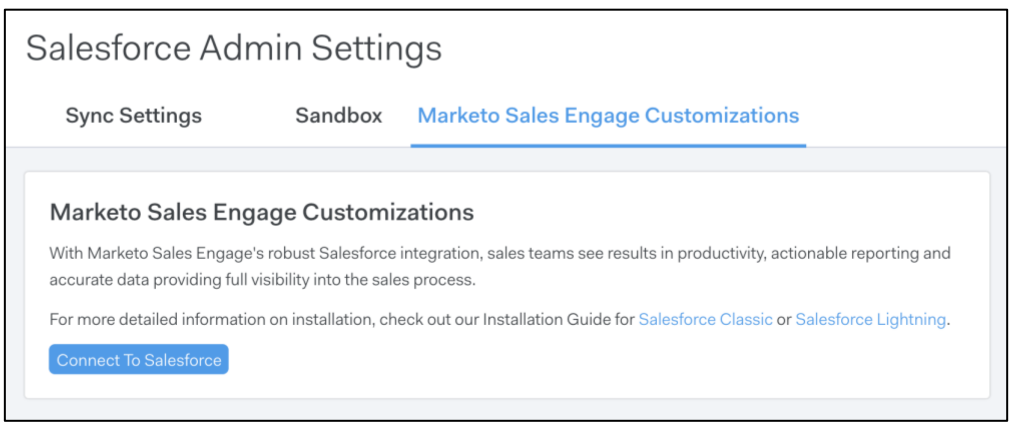
Step 1: Log into your Marketo Sales Engage account. Click on the gear icon on the top right hand corner and navigate to the Settings page. Click on Salesforce in the left side panel under Admin Settings



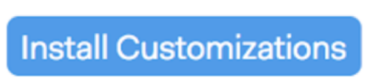
Step 2: Click on Marketo Sales Engage Customizations

If you are not connected to Salesforce you will see "Connect to Salesforce" button. Click on the button

You'll get redirected to Salesforce where you need to Allow Access between your Sales Engage and Salesforce account. Afterwards, you'll be brought back to the Salesforce page



Once connected you will now see the option to Install Customizations and this is covered in the next section.



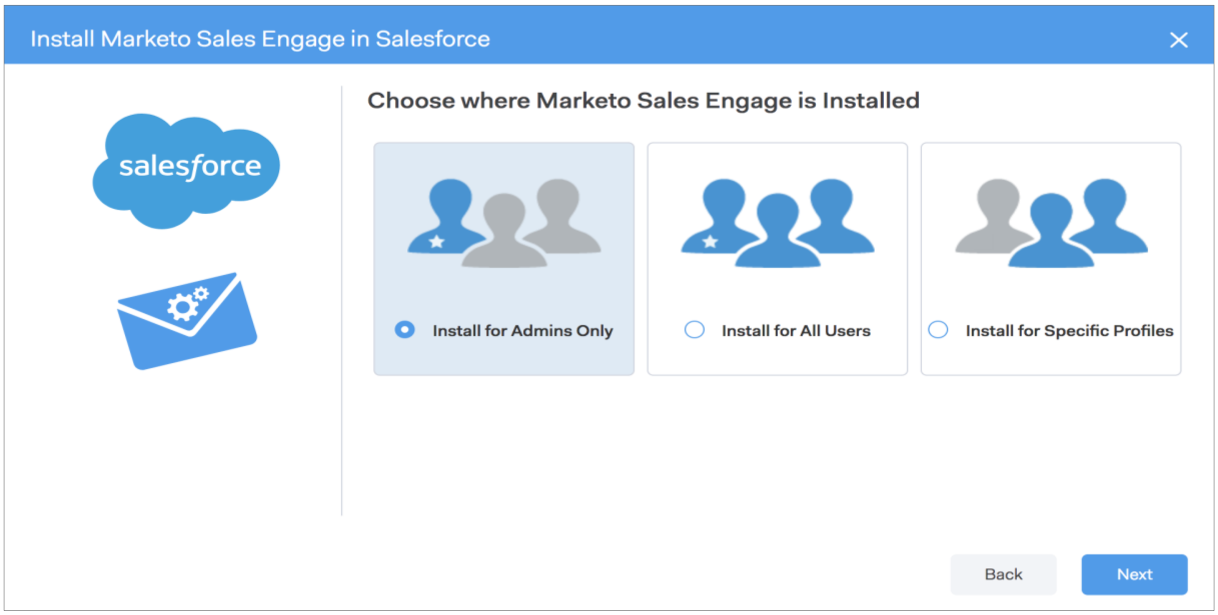
If you can already connected to Salesforce you will see "Install Customization" button. Move on to the next section.

2. SALES ENGAGE SALESFORCE PACKAGE INSTALLATION

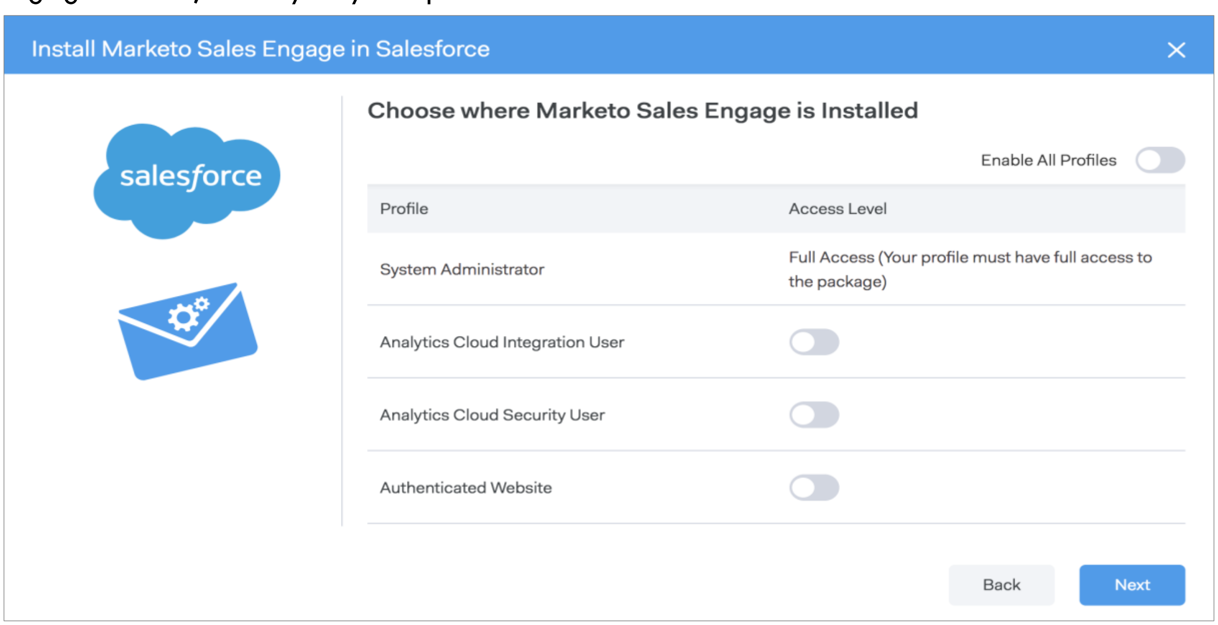
Step 1: Click on Install Customizations in the Marketo Sales Engage tab

Step 2: You will be taken through a wizard which includes details on what will be installed as a part of the package.

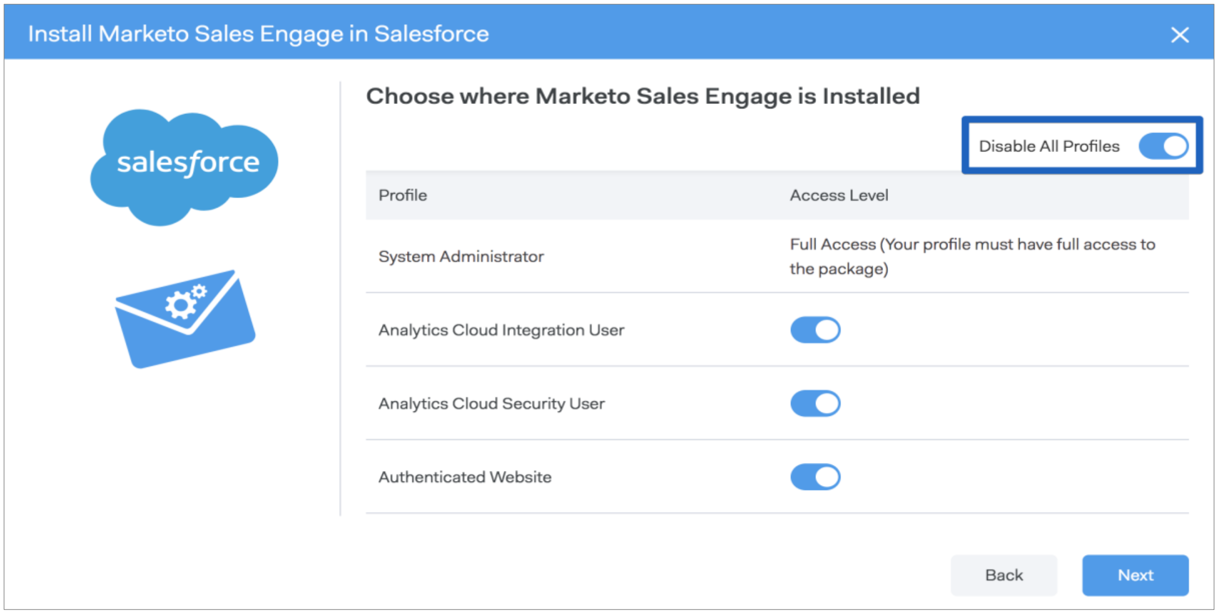
Step 3: You can install Sales Engage for Admins only, All users or for Specific Profiles only. If you choose to install for Specific profiles, you can choose the profiles in the screen that follows.



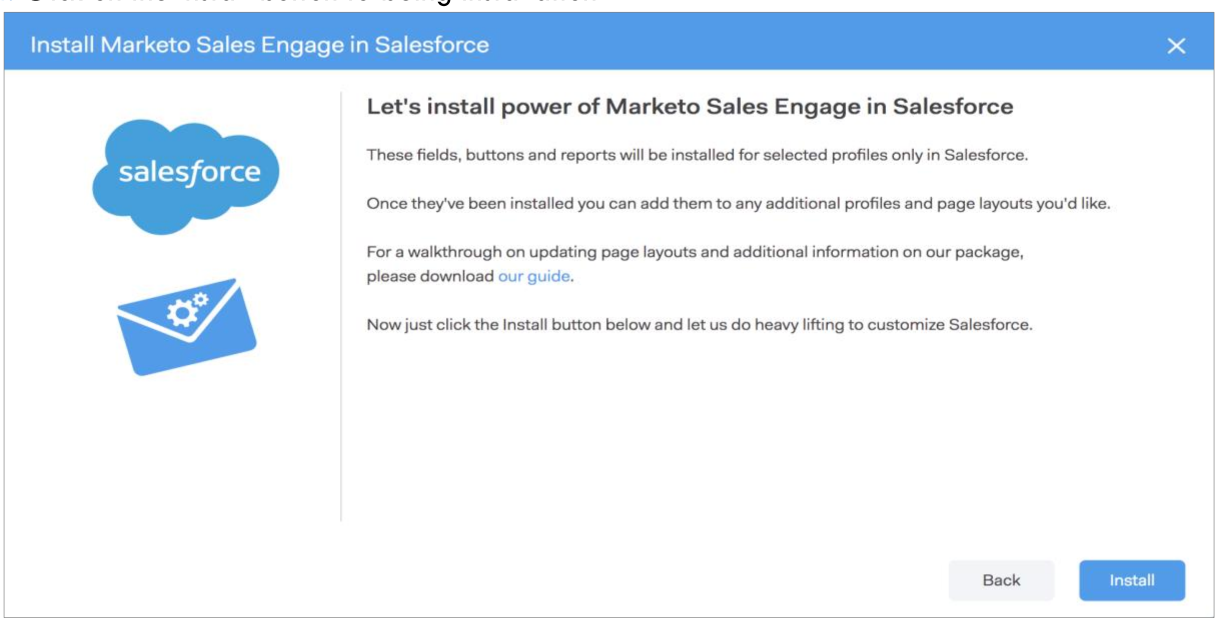
Sales Engage Tip: We recommend granting access to all users since this only defines access to the Sales Engage buttons, not any of your specific email data.



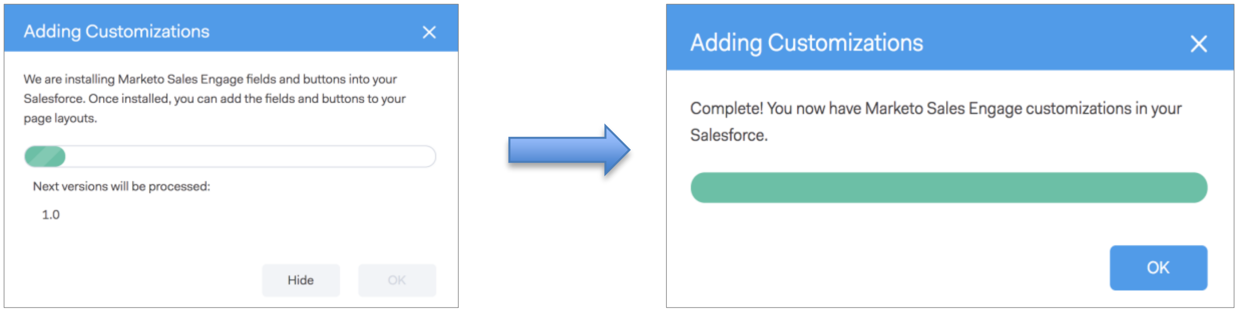
Sales Engage Tip: You can still choose to enable for all profiles or disable for all profiles using the toggle



Step 4: Click on the Install button to being installation



You will see the "Adding Customizations" modal which will show you your progress



Congratulations. You've finished updating the Sales Engage Salesforce Package

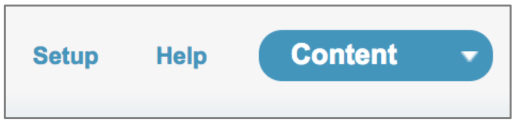
3. Configuring the Sales Engage Salesforce package

Estimated Time: 20 Minutes

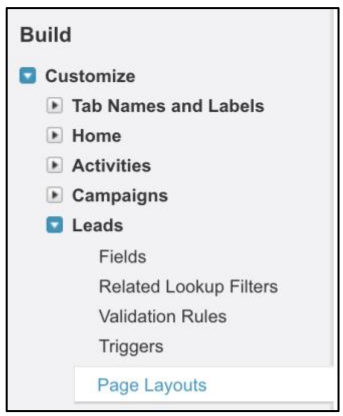
Sales Engage Tip: The next sections includes details on how to add MSE buttons & fields in Lead view. You can follow the same steps for Contact, Account & Opportunity view as well.

3a. Add Sales Engage fields to Page Layouts

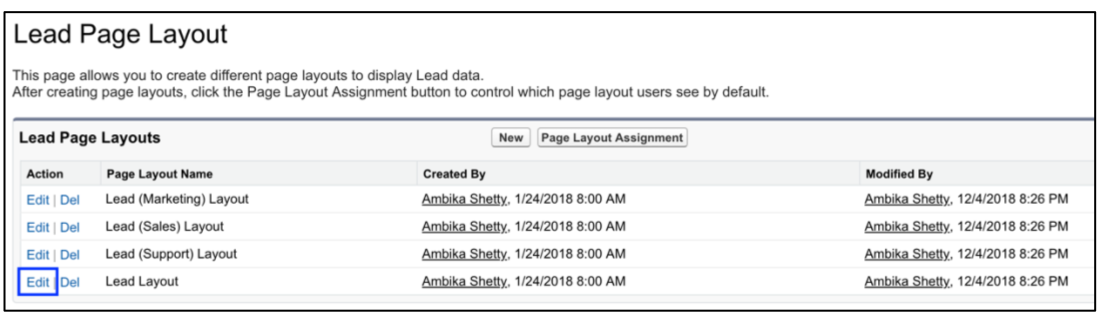
Step 1: In your Salesforce account, click your name and select "Setup".



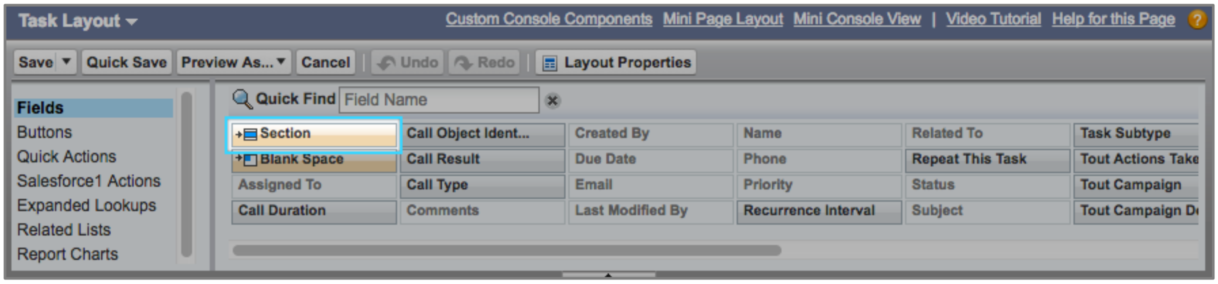
Step 2: From the left side menu, under "Build" select Customize > Leads



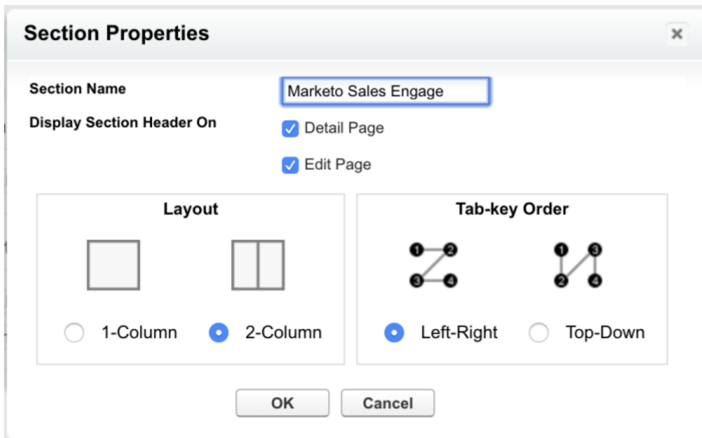
Step 3: Under Lead Page Layout, click on Edit for "Lead Layout"



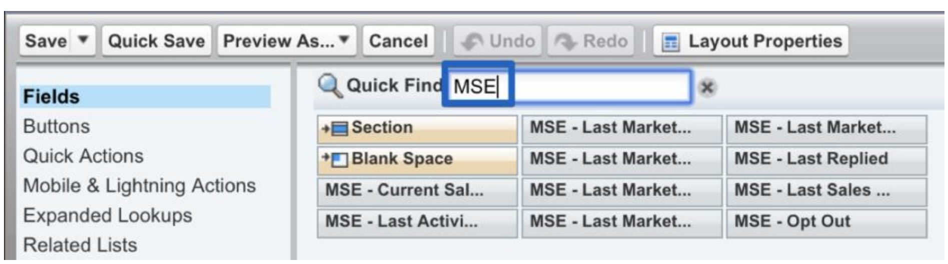
Step 4: Now, create a section to house your Sales Engage Custom Fields.

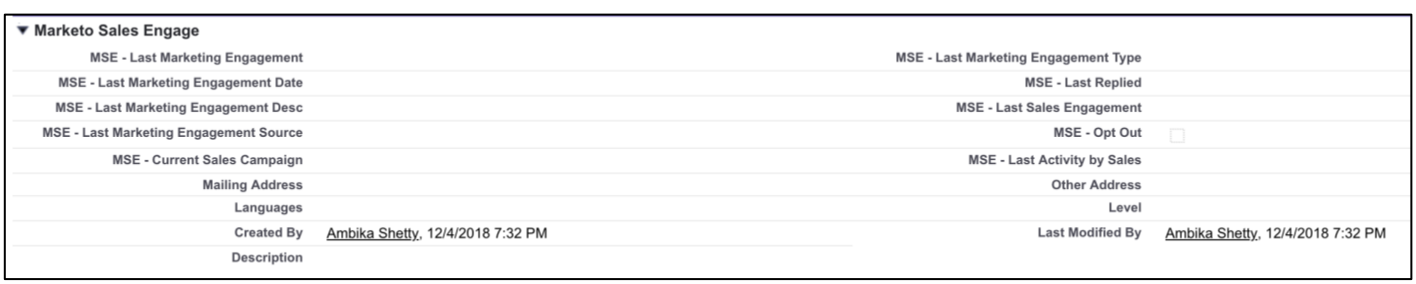


Step 5: Once the Section Properties window opens, fill out the Section Name (We recommend calling it "Marketo Sales Engage") and select 2-Column. Click "OK" when you're done.

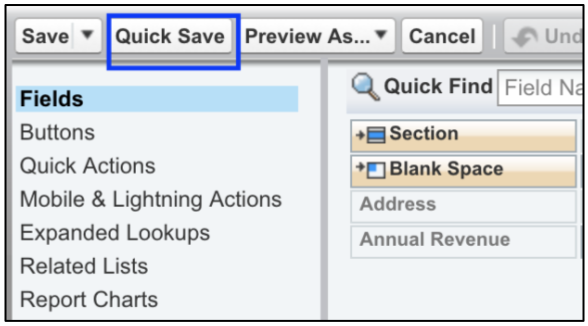


Step 6: Click on Fields in the console & drag drop the fields that you'd like to add to the page layout. An easy way to find Sales Engage fields is to type out MSE in the Quick find text field.





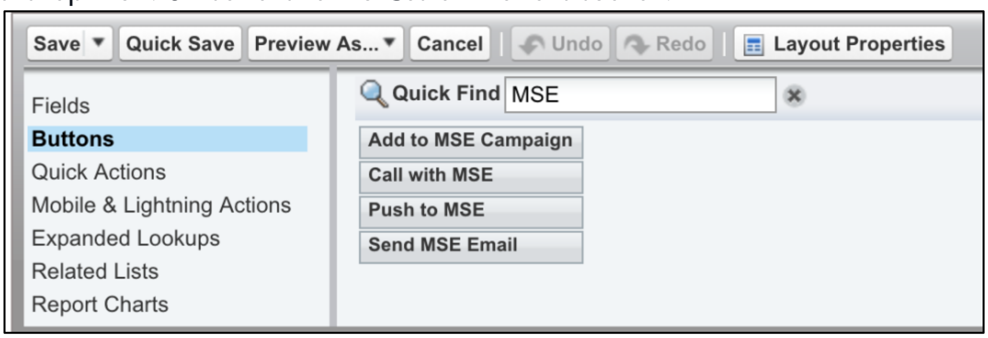
Step 7: Click "Quick Save" when you're done.



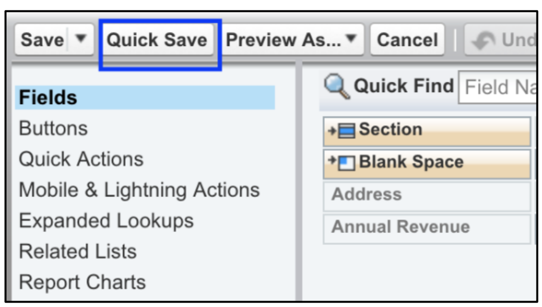
3B. ADD SALES ENGAGE BUTTONS PAGE LAYOUTS

Step 1: Head back to console and click on Buttons

Step 2: Drag and drop the MSE buttons to the Custom Buttons section.

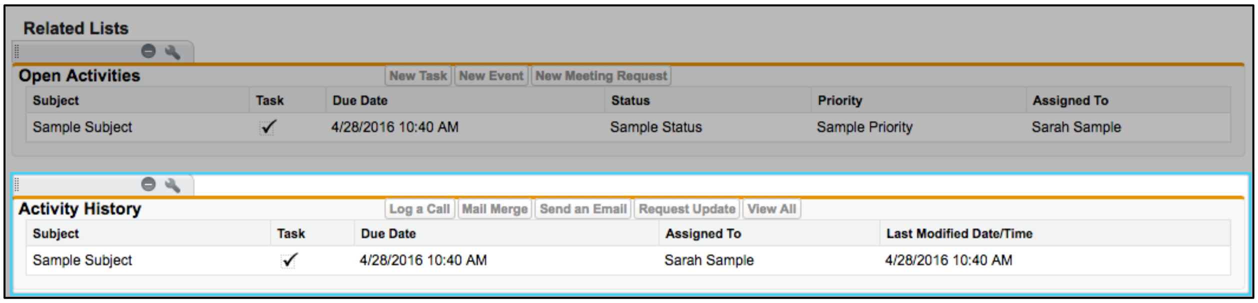


Step 3: Click "Quick Save" when you're done.

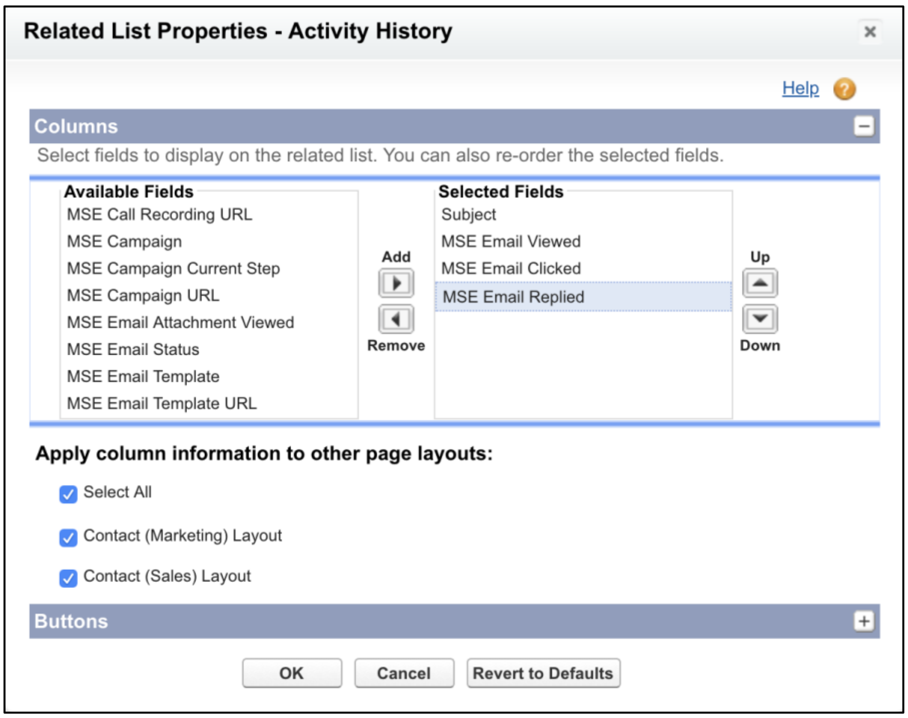


3C. ADD SALES ENGAGE FIELDS TO ACTIVITY HISTORY

Step 1: Scroll to the bottom of the page to the Activity History related list section and click on the Wrench icon.



Step 2: Next, select the Sales Engage Fields you want to display in your Activity History section. Click on the Add arrow to move them to the right pane. Click OK when you're done.

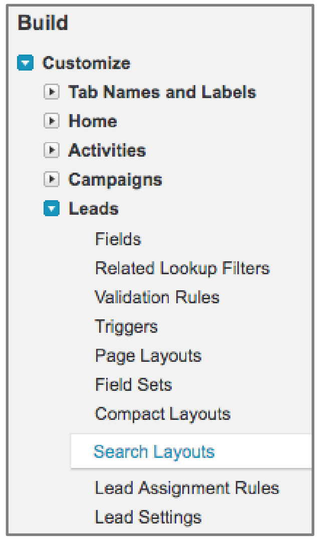


Sales Engage Tip: Salesforce only allows you to show 10 columns in your Activity History Related List view. We recommend including the following Sales Engage fields in Activity History: Type, Sales Engage Clicked, Sales Engage Viewed and Sales Engage Replied.

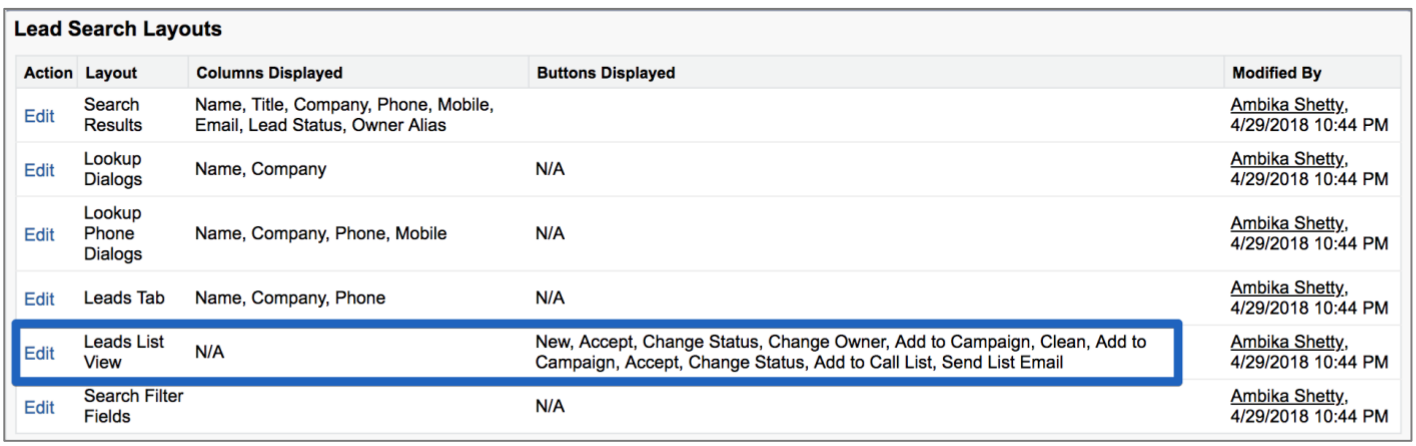
Step 4: Click "Save" when you're done with Leads page.

3D. ADD SALES ENGAGE BUTTONS TO LEADS LIST VIEW (BULK ACTIONS)

Step 1: Head back to the left side menu, select Customize > Leads > Search Layout.



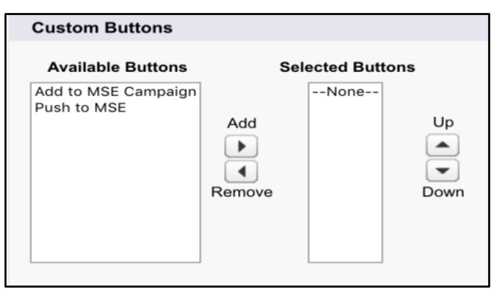
Step 2: Click Edit next to the Leads List View.



Lead Search Layouts

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	Name, Title, Company, Phone, Mobile, Email, Lead Status, Owner Alias		Ambika Shetty, 4/29/2018 10:44 PM
Edit	Lookup Dialogs	Name, Company	N/A	Ambika Shetty, 4/29/2018 10:44 PM
Edit	Lookup Phone Dialogs	Name, Company, Phone, Mobile	N/A	Ambika Shetty, 4/29/2018 10:44 PM
Edit	Leads Tab	Name, Company, Phone	N/A	Ambika Shetty, 4/29/2018 10:44 PM
Edit	Leads List View	N/A	New, Accept, Change Status, Change Owner, Add to Campaign, Clean, Add to Campaign, Accept, Change Status, Add to Call List, Send List Email	Ambika Shetty, 4/29/2018 10:44 PM
Edit	Search Filter Fields		N/A	Ambika Shetty, 4/29/2018 10:44 PM

Step 3: Next, select the Add to MSE Campaign option and click add. Repeat for Push to MSE. Click save when you are done.



Congratulations. You've finished building out the Sales Engage functionality in your team's Lead Views Salesforce account. The next section in the Guide will cover out of the box reporting and dashboards for your team.

MSE CONFIGURATION FOR CONTACTS:

Step 1: In your Salesforce account, click your name and select "Setup".

Step 2: From the left side menu, under “Build” select Customize > Contact

Step 3: Under Contact Page Layout, click on Edit for “Contact Layout”

Step 4: Repeat steps from Section 3 (3A, 3B, 3C & 3D)

MSE CONFIGURATION FOR OPPORTUNITY:

Step 1: In your Salesforce account, click your name and select “Setup”.

Step 2: From the left side menu, under “Build” select Customize > Opportunity

Step 3: Under Opportunity Page Layout, click on Edit for “Opportunity Layout”

Step 4: Repeat steps from Section 3 (3A, 3B & 3C)

Note: Opportunity view has only one button – “Send MSE Email”

MSE CONFIGURATION FOR ACCOUNT:

Step 1: In your Salesforce account, click your name and select “Setup”.

Step 2: From the left side menu, under “Build” select Customize > Account

Step 3: Under Account Page Layout, click on Edit for “Account Layout”

Step 4: Repeat steps from Section 3 (3A, 3B & 3C)

Note: Account view has only one button – “Send MSE Email”

4. SALES ENGAGE CUSTOMIZATION DETAILS

Custom Activity Fields	**Description**	**Type**	**Data Type**
MSE Call Local Presence ID	As a user, I can choose Local Presence as an option when I make calls from MSE Phone. Incoming call will show a local number for the receiver	Activity	Text
MSE Call Recording URL	Calls can be recorded and a link for this recording will be logged here	Activity	Text
MSE Campaign	Logs name of the MSE campaign the Contact/Lead is on	Activity	Text
MSE Campaign URL	Logs URL to the campaign that was created in MSE. Clicking on this will open the campaign in MSE web app	Activity	Text
MSE Campaign Current Step	If a contact/lead is on a campaign, this field will log the name of the step the contact/lead is currently on	Activity	Text
MSE Email Attachment Viewed	Logs data when an email is sent with an attachment and this attachment is viewed by the recipient	Activity	Checkbox
MSE Email Clicked	Logs a check mark when recipeint clicks a link in the email	Activity	Checkbox
MSE Email Replied	Logs a check mark when recipeint replies to email	Activity	Checkbox
MSE Email Status	Shows if an email is sent/in progress/bounce (tracking bounced email depends on the delivery channel used)	Activity	Text
MSE Email Template	Logs name of the MSE template that was used in email sent to Lead/Contact	Activity	Text
MSE Email Template URL	Logs URL to the template that was created in MSE. Clicking on this will open the template in MSE web app	Activity	Text
MSE Email URL	Clicking on this URL will open command center in MSE and pull up People Detail View history tab where user can see the sent email	Activity	Text
MSE Email Viewed	Logs a check mark when recipeint views an email	Activity	Checkbox

MSE Roll up logging field	**Description**	**Type**	**Data Type**
MSE - Last Marketing Engagement	Last incoming engagement from Marketing	Account Contact Lead Opportunity	Data and Time
MSE - Last Marketing Engagement Date	Time stamp of engagement from Marketing	Account Contact Lead Opportunity	Data and Time
MSE - Last Marketing Engagement Desc	Description of the engagement	Account Contact Lead Opportunity	Text
MSE - Last Marketing Engagement Source	Source of Marketing engagement	Account Contact Lead Opportunity	Text
MSE - Last Marketing Engagement Type	Type of Engagement. Ex: Web activity	Account Contact Lead Opportunity	Text
MSE - Last Activity by Sales	Last outgoing activity performed by the sales team	Account Contact Lead	Data and Time

		Opportunity	
MSE - Last Replied	Last email reply to Sales email	Account Contact Lead Opportunity	Data and Time
MSE - Current Sales Campaign	Logs name of the MSE campaign the Contact/Lead is on	Account Contact Lead Opportunity	Text
MSE - Last Sales Engagement	Last incoming engagement from Sales	Account Contact Lead Opportunity	Data and Time
MSE - Opt Out	Opt out field	Account Contact Lead Opportunity	Check box

MSE Buttons	Description	Type
Send MSE Email	Send sales emails from Salesforce	Account Contact Lead Opportunity
Add to MSE Campaign	Add to MSE campaigns from Salesforce	Contact Lead
Push to MSE	Push contact from Salesforce to MSE	Contact Lead
Call with MSE	Make sales calls from Salesforce	Contact Lead

MSE Bulk Action Buttons	Description	Type
Add to MSE Campaign	Add to MSE campaigns from Salesforce	Account Contact Lead Opportunity
Push to MSE	Push contact from Salesforce to MSE	Account Contact Lead Opportunity

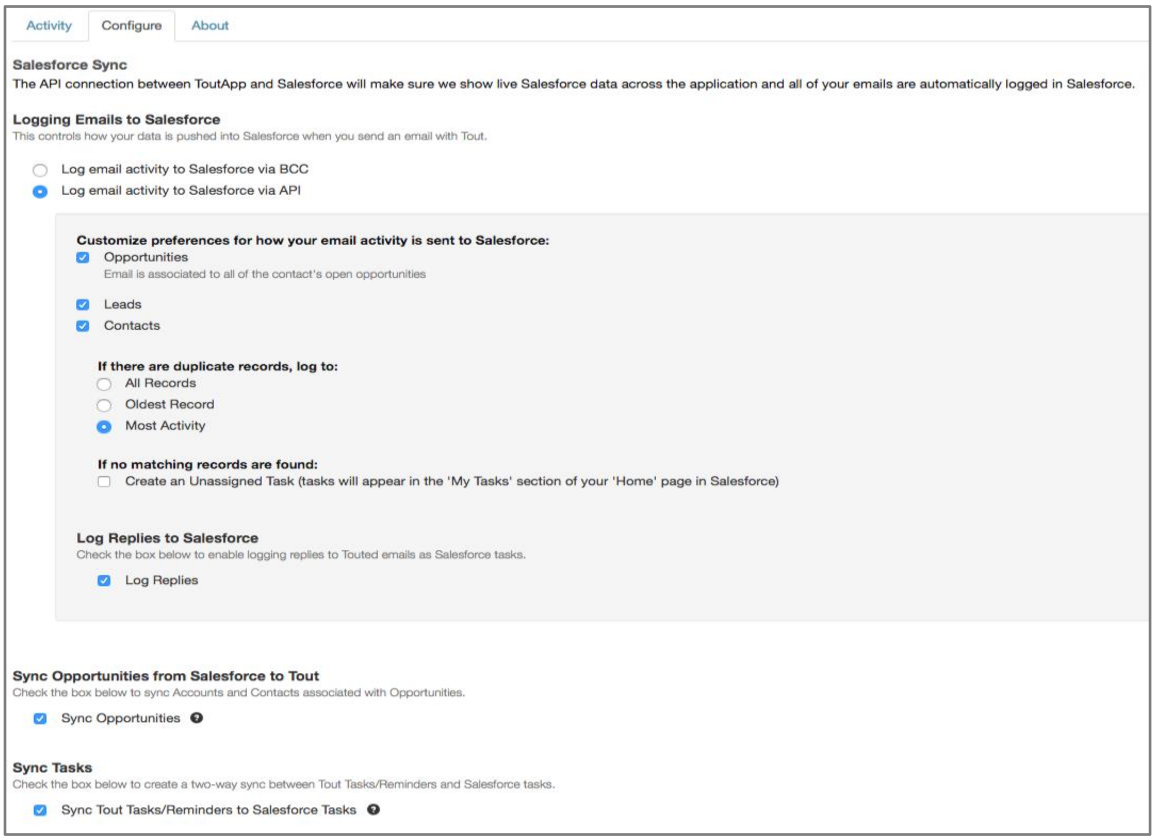
5A. SALES ENGAGE AND SALESFORCE ACCOUNT CONFIGURATION

Estimated Time: 5 Minutes

Now that you've set up the Sales Engage experience in Salesforce, it's time to head over to your Sales Engage account.

Every Sales Engage user needs to connect to their Salesforce account. As for the account configuration, each user can set up their own configuration or an Admin can override settings & set up configuration for the entire subscription. (Next section)

To set up your SF settings in MSE. Navigate to Settings > CRM > Manage > Configuration

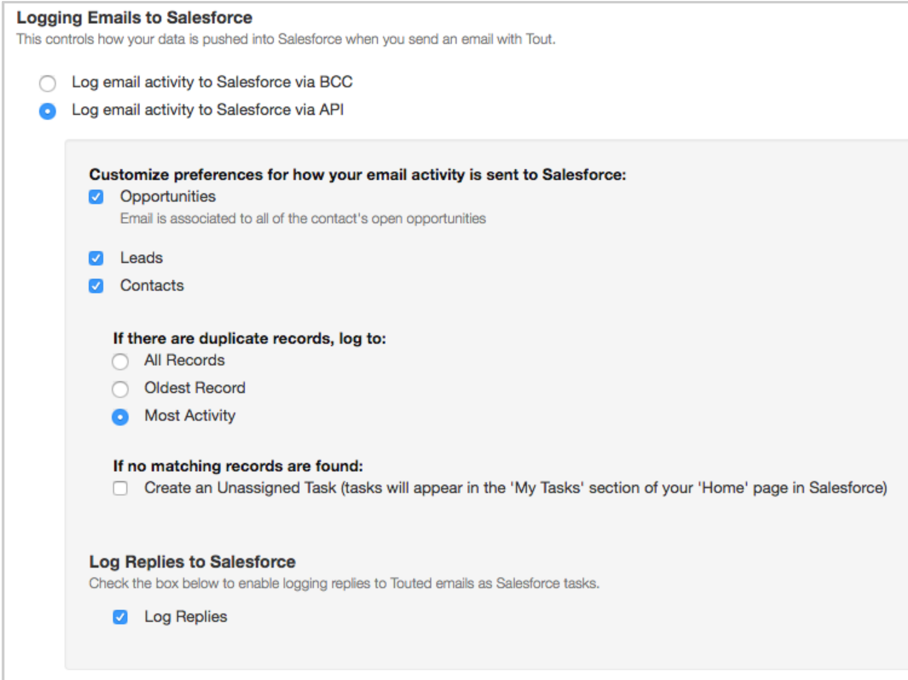


Sales Engage Tip: The settings you see defaulted on, are the recommended settings

Let's dive into each setting that users have available to them.

Logging Email Activity via API

We recommend logging email activity to Salesforce via API. To use Logging Email Activity to Salesforce via API setting, you are required to be on an Enterprise Edition of Salesforce or the Professional Edition of Salesforce (if you purchased the Integration via Web Services API).



There are a number of settings in Sales Engage you can adjust if you log your email activity to Salesforce via API.

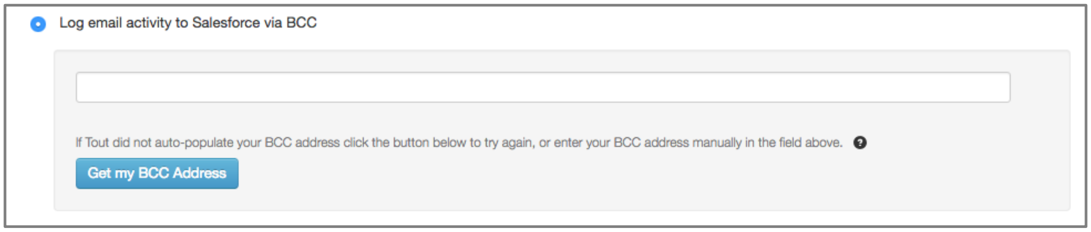
1. You have the option to send your email activity to the Opportunities, Leads and Contacts. We recommend sending email activities to Salesforce on for all of these options.
2. If there are duplicate contact or lead records, you can log the activity to All Records, Oldest Record or Most Activity. We recommend selecting Most Activity.
3. If no matching records are found, you can turn on the option to Create an Unassigned Task. This task will appear in the "My Tasks" section of your Home page in Salesforce. This through your reps workflow and decide if this makes sense.
4. You can enable logging replies to Sales Engageed Emails as Salesforce tasks.

All of these settings can be overridden by the Sales Engage Master Admin if you want the team to use the same activity syncing settings. See page 27 for instructions.

Sales Engage Tip: Make sure the API settings you select match your Salesforce Email Associations settings.

<u>Logging Email Activity via BCC</u>

To log your email activity via BCC you first need to obtain your Email to Salesforce address. Do this by clicking "Get My BCC Address". If for some reason your Email to Salesforce address doesn't pull, you can get it from Salesforce directly. (My settings > Email > My Email to Salesforce. Copy this address and paste it in the BCC address field in your Sales Engage account.



Sales Engage Tip: As the Salesforce Admin, you may need to enable the “My Email to Salesforce” for all users in you want your team to log email activity via BCC.

Sync Opportunities from Salesforce with Sales Engage

By syncing your opportunities with Sales Engage, you’ll be able to:

- Use the Sales Gong to celebrate & share when you close deals. Sales Engage will update your opportunity stage once you “ring the gong.
- Insights into how many emails it takes to close a deal, the opportunity age and deal size
- Have a heat map of your opportunities to see when deals are heating up
- Update your pipeline from anywhere using Sales Engage & our Chrome extension.
- Do note - enabling this setting will affect your API limits.

Sync Tasks

If you enable this setting, a two way sync will be created between Salesforce and Sales Engage. That means anything created, edited, completed or deleted in Sales Engage will be reflected in Salesforce. Anything created, edited, completed or deleted in Salesforce will be reflected in Sales Engage. These syncs should take about 10 minutes to appear. Do note - enabling this setting will affect your API limits.

Once you’re done adjusting your all of your settings, click “Save”.

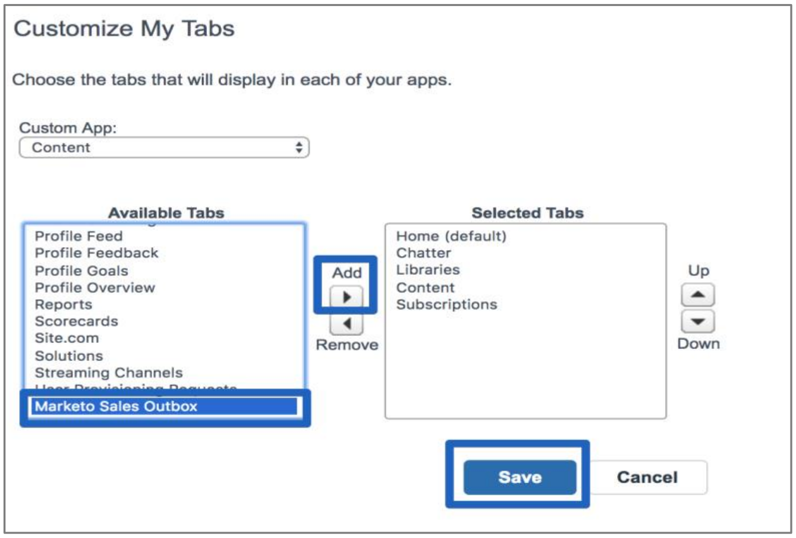
Add Sales Engage Outbox

The Sales Engage Outbox allows team members to quickly access all of Sales Engage directly from Salesforce. Through Sales Engage Outbox, a user will be able to create and review email templates, send a Group Email, create a Campaign and manage their daily priorities with Command Center. Follow these steps to add Sales Engage Outbox to your Salesforce account. You will want to make sure all reps have this set up.

Step 1: In your Salesforce account, click the + tab on the top of your screen.

Step 2: Then click Customize My Tabs to add a new tab to your default display.

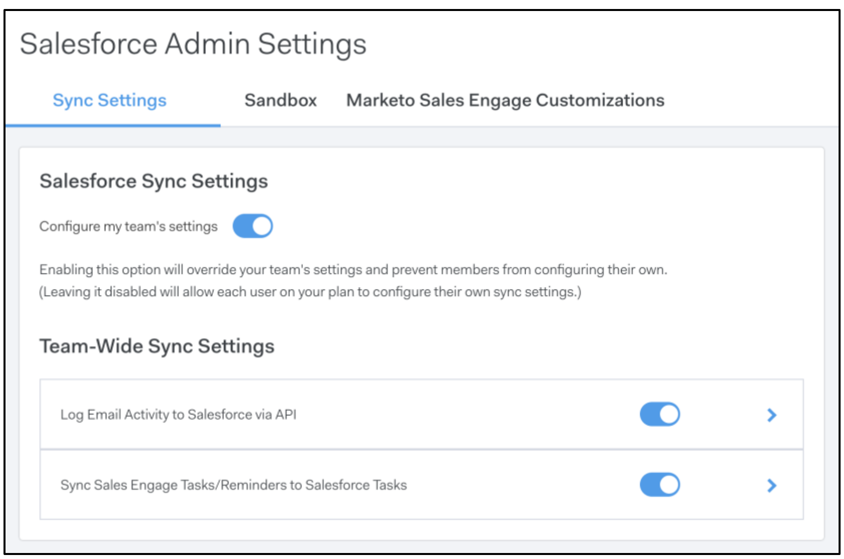
Step 3: On the Customize My Tabs screen, select Sales Engage Outbox option from the left pane. Click on the Add arrow to move it to the right pane. Click Save when you’re done.



Sales Engage Tip: If your reps do not see the option to add the Sales Engage Outbox to their Salesforce Tab, it may be related to your Salesforce permissions. If this is the case, we recommend as an Admin you set up your Sales Engage Outbox first so your team members can add their Sales Engage Outbox to their accounts.

5B. Sales Engage Account admin settings

Sales Engage Master Admins have the option to configure some of their team's Salesforce Settings within Sales Engage. Head to https://Sales Engage.com/next#settings/admin and look at the Salesforce Configuration section.



<u>Enable Unsubscribe Syncing with Salesforce</u>

With this setting enabled, any Salesforce Lead or Contact that has been blocked unsubscribed by clicking a block unsubscribe link in a Sales Engageed email from any member of your team will automatically be marked as "Email Opt Out" in Salesforce. Additionally, if your team uses the Push to Sales Engage button in Salesforce, any Lead or Contact that is marked as "Email Opt Out" will not be added to the new Sales Engage group after the push.

In Salesforce, Field Level Accessibility must be configured to properly allow all users on your team to view and edit the 'Email Opt Out' field for Leads and Contacts. If the 'Email Opt Out' field is not visible on the Lead and Contact objects, or the users on your team do not have access to it due to their Permission Set, Sales Engage will not be able to properly update this field with new block unsubscribe information.

Once the above criteria have been fulfilled, this Sales Engage/Salesforce opt out sync will run once a night, between 8:00pm and 9:00pm PST. You also do not need to have Salesforce Task sync enabled in order for this feature to work properly.

Override all Salesforce Sync Settings for Your Team

Checking this box means all team members will have the settings you set applied to their Sales Engage accounts.

If you log email activity via API you will have more options to sync email activity and log replies to Salesforce.

Congratulations. You've fully setup your Sales Engage and Salesforce accounts. The next section in this guide will cover best practices and some frequently asked questions about the installation and setup process.