Marketo Sales Connect for Salesforce Lightning: Installation Guide

In this guide you'll learn how to:

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

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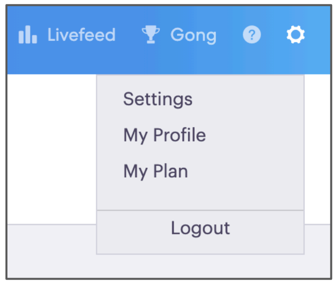
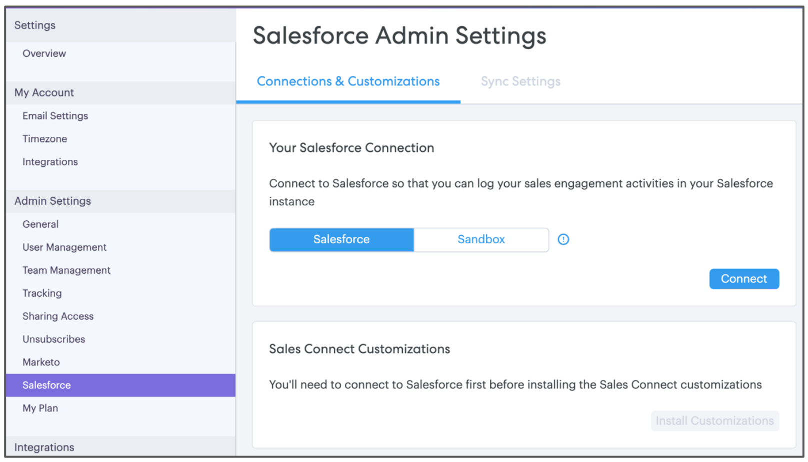
1. CONNECT SALES CONNECT TO SALESFORCE

Pre-requisite: You need to have Admin access to your Marketo Sales Connect account

Step 1: Log into your Marketo Sales Connect account. Click on the gear icon on the top right-hand corner and navigate to the Settings page.



Steps 2: Click on Salesforce in the left side panel under Admin Settings. Click on “Connect” button in “Your Salesforce Customization” card

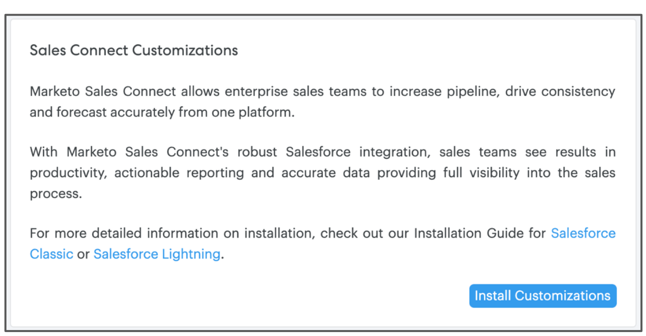


You’ll get redirected to Salesforce where you need to Allow Access between your Sales Connect and Salesforce account. Afterwards, you’ll be brought back to the Salesforce page

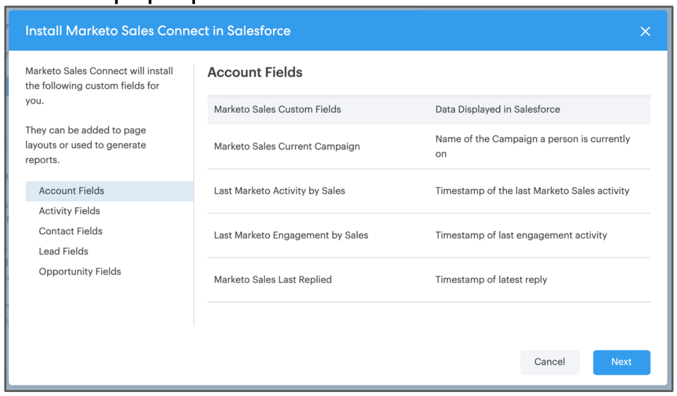
Once connected “Install Customizations” will be activated

2. SALES CONNECT CUSTOMIZATIONS INSTALLATION

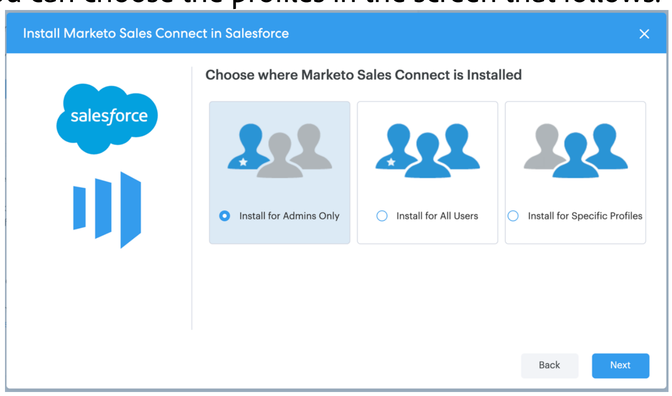
Step 1: Click “Install Customizations”.



Step 2: Follow the instructions in the pop-ups to install customizations

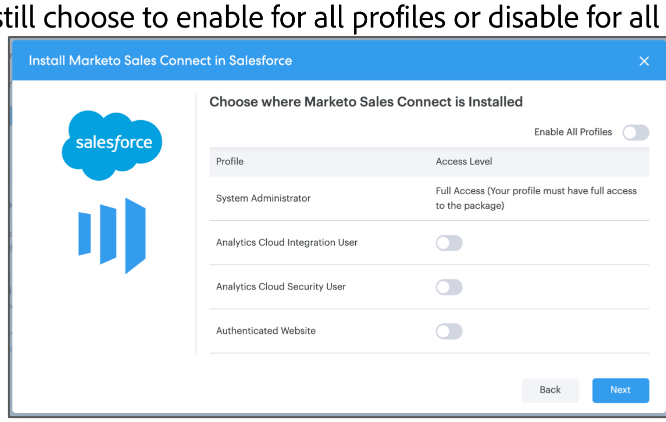


Step 3: You can install Sales Connect for Admins only, All users or for Specific Profiles only. If you choose to install for Specific profiles, you can choose the profiles in the screen that follows.

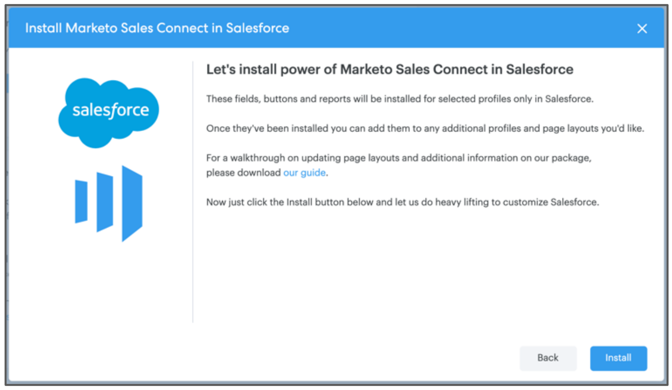


Sales Connect Tip: We recommend granting access to all users since this only defines access to the Sales Connect buttons, not any of your specific email data. However, if you choose to install customization to Specific Profiles you will be able to choose the profiles in the following screen.

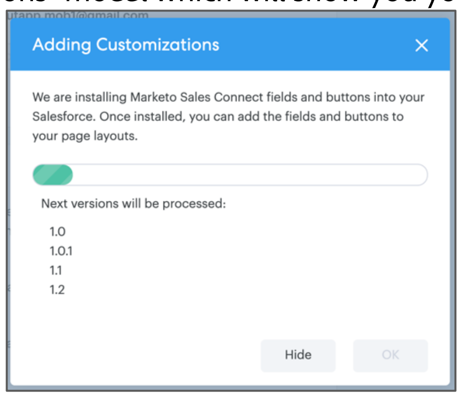
Sales Connect Tip: You can still choose to enable for all profiles or disable for all profiles using the toggle



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 Connect Salesforce Package

3. Configuring the Sales Connect Customizations in Salesforce

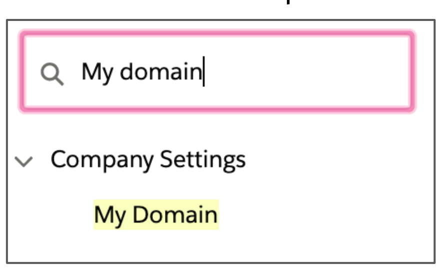
Now that you’ve installed the Sales Connect Salesforce Customizations, it’s time to add buttons and fields to your page layout.

3A. Creating Custom Domain

If your organization already has custom domain set up, you can skip this section and move on to the next section.

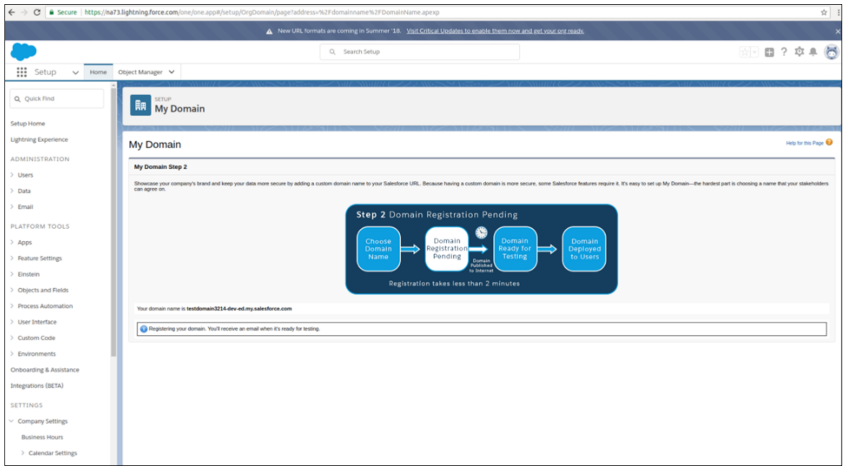
Step 1: Click on the “Setup” on the top right-hand corner

Step 2: Search for My Domain in the search field in the side panel & click on it

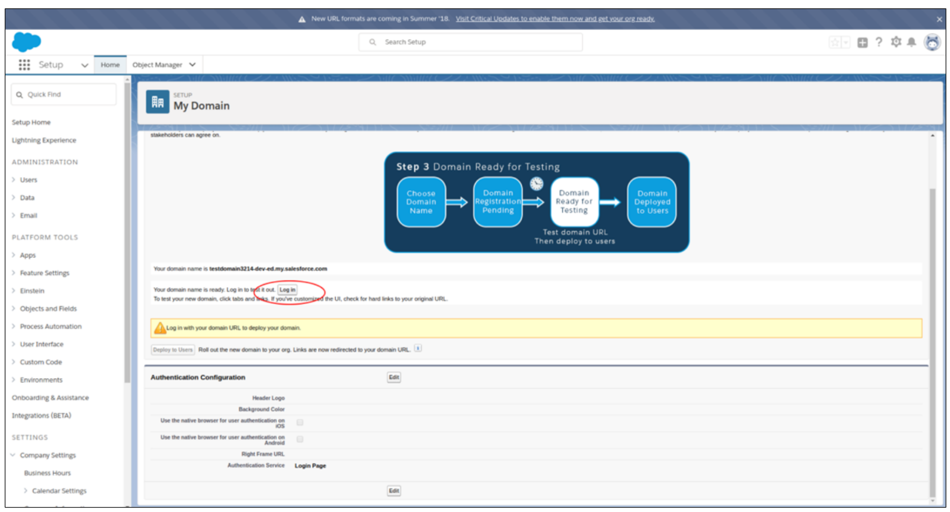


Step 3: Enter a custom domain name, test for availability and then click “Register Domain”

Registration takes about 2-3 minutes. Once completed you will receive a verification email from Salesforce



Step 4: Once complete, you can now log in with your custom domain name



Step 5: You will receive a prompt to allow the browser to open this page.

Step 6: You can choose to deploy the custom domain to all users on your account

3B. Creating Lead Record Page

If you already have a lead record page you can move onto the next section, if not you can follow the steps in this section to create a Lead Record Page

Step 1: Click on Object Manager, scroll down & click on Lead

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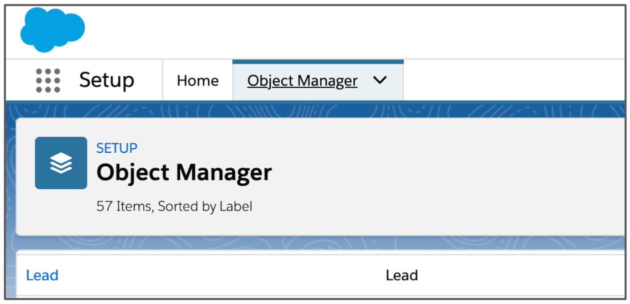
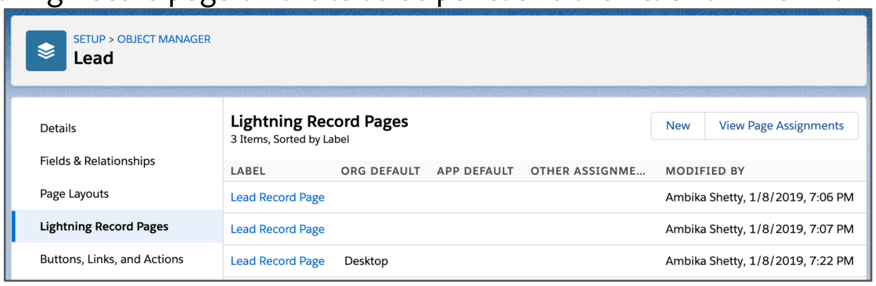
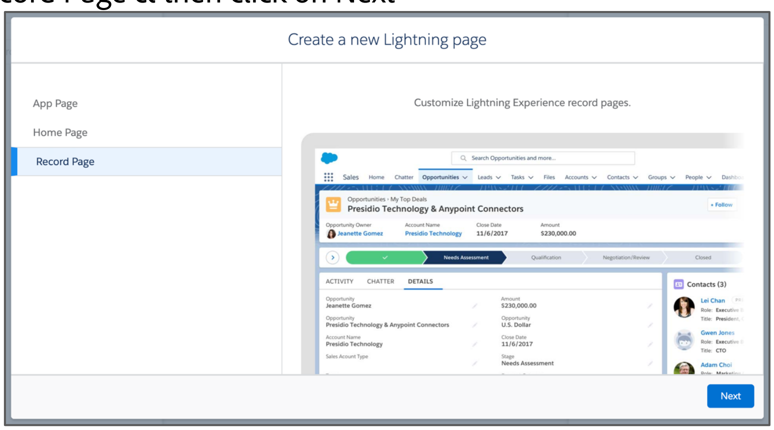


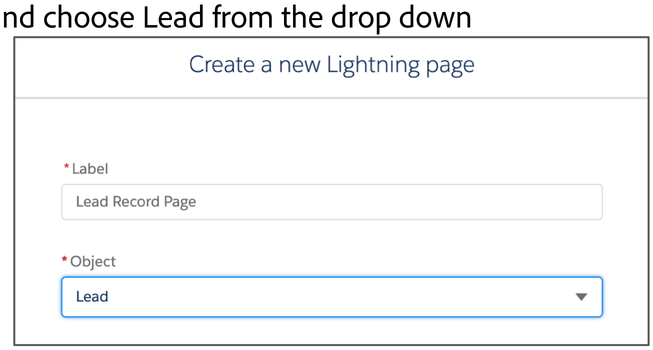
Step 3: Click on Lightning Record page on the left side panel and then click on “New” on the right side



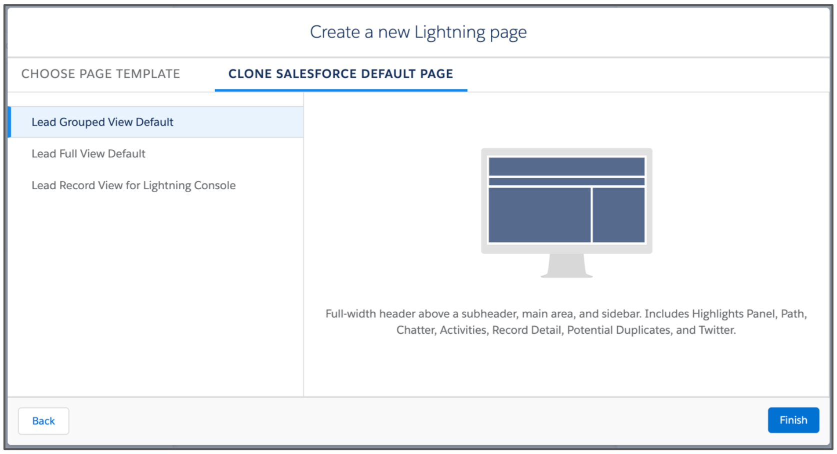
Step 4: Click on Lighting Record Page & then click on Next



Step 5: Enter a Label Name and choose Lead from the drop down



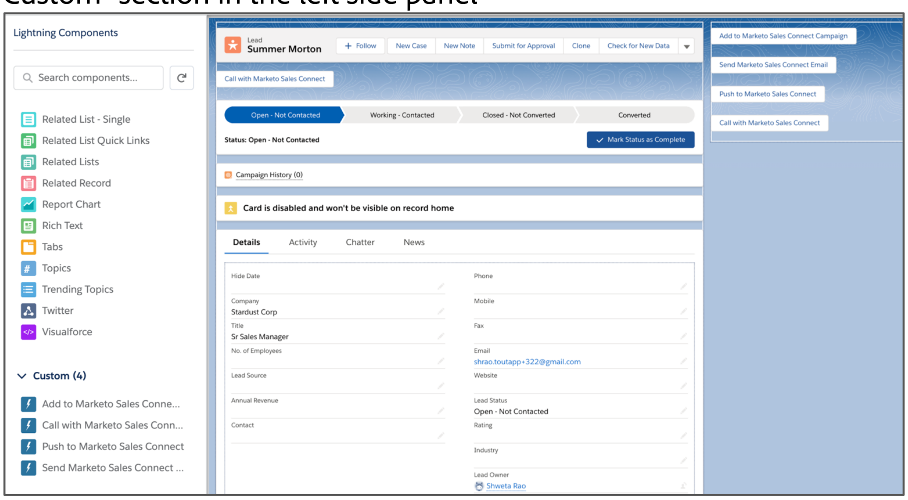
Step 6: Click on Next. In the “Create a New Lightning Page”, click on “Clone Salesforce Default Page” tab and then choose a view that works best for your team. Click on Finish



You have now successfully added a Lead Record Page.

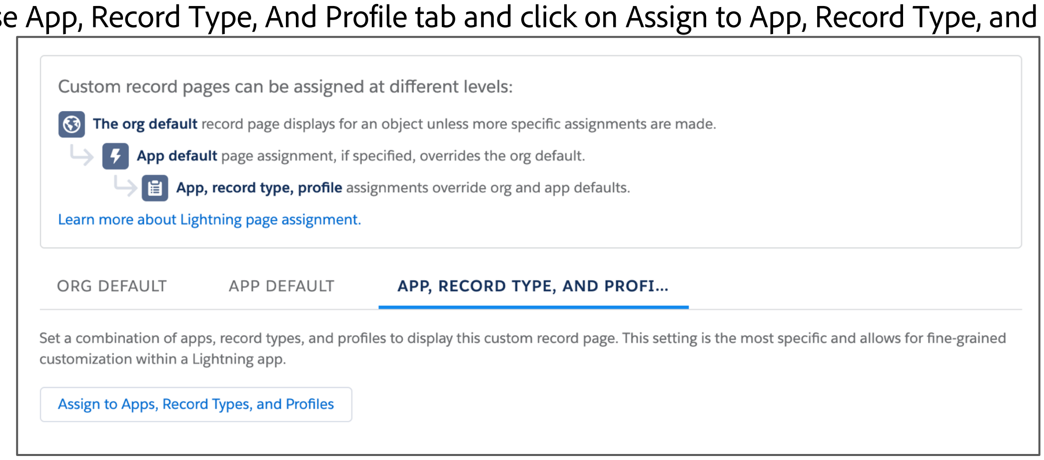
3C. Add Sales Connect Buttons to Lead Record Page Layouts

Step 1: Once you have successfully created your Lead Record page you can now see Marketo Sales Connect buttons under the “Custom” section in the left side panel

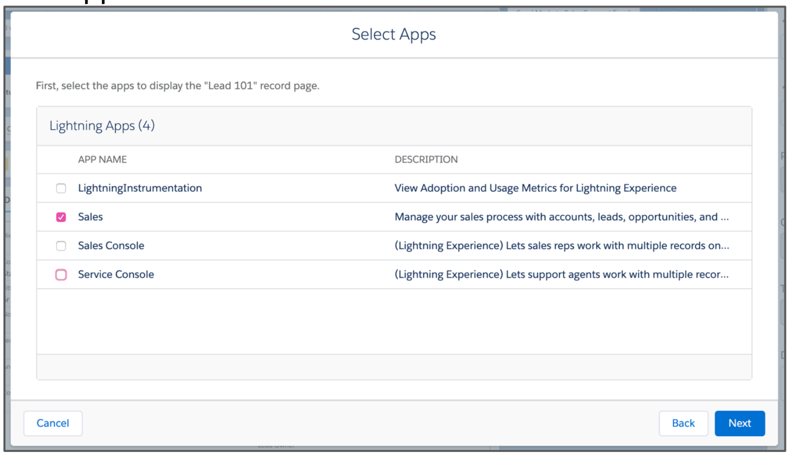


Step 2: When you click on save you will be prompted to activate this page for all users, click on Activate if you choose to do so.

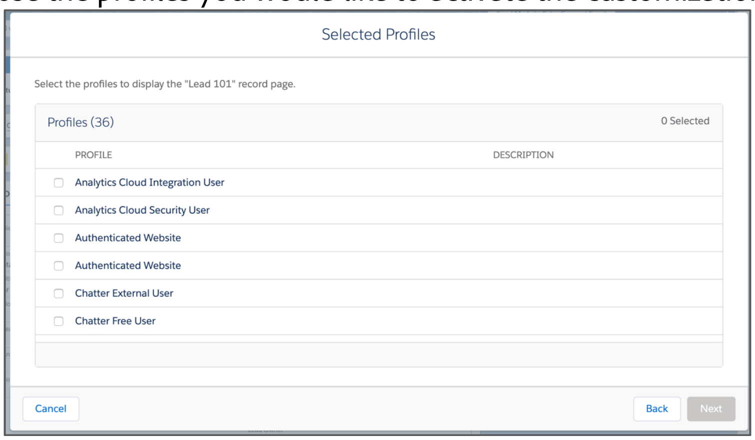
Step 3: Choose App, Record Type, And Profile tab and click on Assign to App, Record Type, and Profiles.



Step 4: Select Sales from the App modal



Step 5: You can then choose the profiles you would like to activate the customizations



Step 6: You can review the Profiles in the Review Assignments tab & then click on Save

Step 7: You have successfully added buttons to your Lead Record page

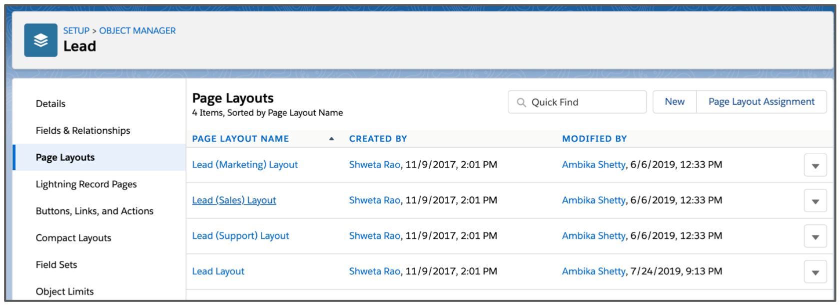
You can follow the same process to add buttons to Contact, Accounts & Opportunity pages as well.

3D. Add Sales Connect fields to Lead Record Page Layouts

To ensure you can properly report on Sales Connect engagement data, you should add all Custom Sales Connect Fields, including the Type field, to the Task Page Layout. Follow these steps to set it up for your team's Salesforce account.

Steps 1: Navigate to Salesforce Set Up page. Click Object Manager. Scroll down and click on "Leads".

Step 2: Click on Page Layouts on the left side Panel. Click on Lead Layout

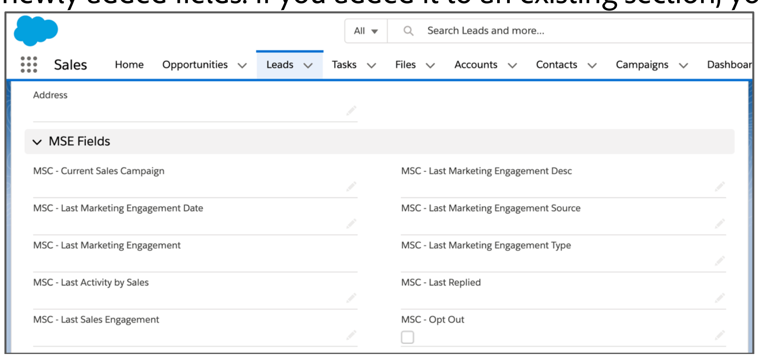


Step 3: You can choose to add a separate section for Marketo Sales Connect fields or you can add it to an existing section

Step 4: Search for "MSC" in your Quick Find field which brings up all the MSC fields. You can drag and drop all the fields to the new section you created or an existing section

Step 5: Click on "Quick Save"

Step 6: You can see your newly added fields. If you added it to an existing section, you can see it here



You can follow the same steps for Contacts, Accounts & Opportunities as well.

3E. Adding Sales Connect Fields to Activity History

Step 1: Steps 1: Click on the Settings cog and then select Edit Page Object
Click Object Manager. Scroll down and click on "Leads".
Click on Page Layouts on the left side Panel. Click on Lead Layout

Step 2: Scroll to the bottom of the page to the Activity History related list section and click on the Wrench icon.

Step 3: Click on the Spanner Icon which will bring up the "Related List Properties – Activity History". You can select MSC fields and click on "Add". Click on "OK"

Sales Connect Tip: Salesforce only allows you to show 10 columns in your Activity History Related List view. Although you can't show all Sales Connect fields in a single view, you can report on all Sales Connect fields.

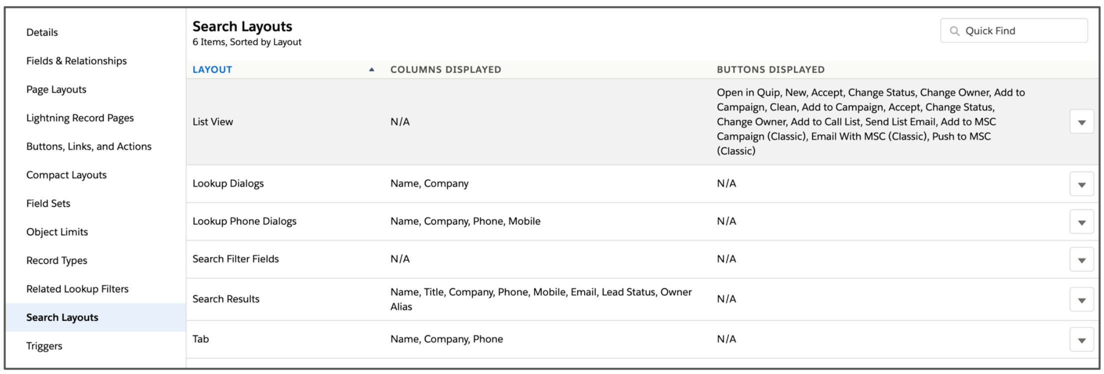
We recommend including the following Sales Connect fields in Activity History: Type, Sales Connect Clicked, Sales Connect Viewed and Sales Connect Replied.

Step 4: Click “Save” when you’re done with Leads page.

Step 5: Repeat Steps 1 - 4 for the Contacts, Accounts & Opportunities Page Layouts.

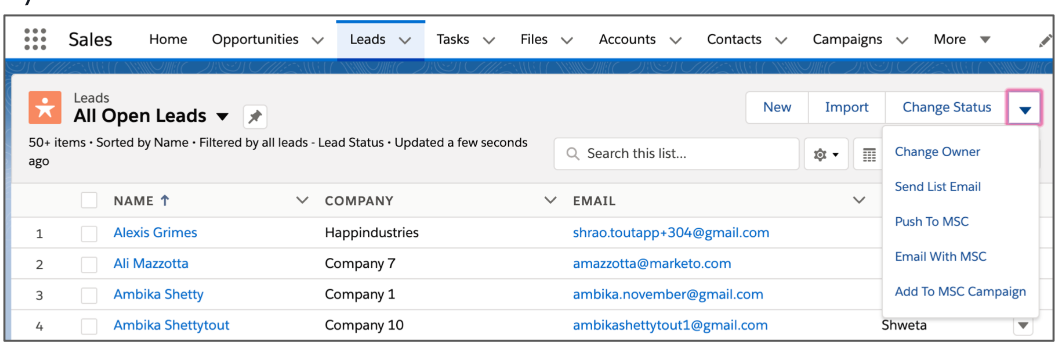
3F. ADD SALES CONNECT BUTTONS TO LEADS LIST VIEW (BULK ACTIONS)

Step 1: Navigate to Salesforce Set Up page. Click Object Manager. Scroll down and click on “Leads”. Choose Search Layouts



Step 2: Click Edit from right side down for List View.

Step 3: Next, select the Add to MSC Campaign, Email with MSC Campaign & Push to MSC option and click add. Click save when you are done.



Congratulations. You’ve finished building out the Sales Connect functionality in your team’s Lead Views Salesforce account. You can follow the same process for Contact View as well. The next section in the Guide will cover out of the box reporting and dashboards for your team.

Note: For “Recently Viewed” list views Salesforce Lightning does not allow to customize buttons.
https://help.salesforce.com/articleView?id=000331581&language=en_US&type=1&mode=1

4. Sales Connect Package Details

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

MSC Roll up logging field	Description	Type	Data Type
MSC - Last Marketing Engagement	Last incoming engagement from Marketing	Account Contact Lead Opportunity	Data and Time
MSC - Last Marketing Engagement Date	Time stamp of engagement from Marketing	Account Contact Lead Opportunity	Data and Time
MSC - Last Marketing Engagement Desc	Description of the engagement	Account Contact Lead Opportunity	Text
MSC - Last Marketing Engagement Source	Source of Marketing engagement	Account Contact Lead Opportunity	Text

MSC - Last Marketing Engagement Type	Type of Engagement. Ex: Web activity	Account Contact Lead Opportunity	Text
MSC - Last Activity by Sales	Last outgoing activity performed by the sales team	Account Contact Lead Opportunity	Data and Time
MSC - Last Replied	Last email reply to Sales email	Account Contact Lead Opportunity	Data and Time
MSC - Current Sales Campaign	Logs name of the MSC campaign the Contact/Lead is on	Account Contact Lead Opportunity	Text
MSC - Last Sales Connectment	Last incoming engagement from Sales	Account Contact Lead Opportunity	Data and Time
MSC - Opt Out	Opt out field	Account Contact Lead Opportunity	Check box

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

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

Email with MSC	Email with MSC from Salesforce	Contact Lead Account * Opportunity *

*Only the first lead or contact from the account/opportunity will be engaged

5A. SALES CONNECT AND SALESFORCE ACCOUNT CONFIGURATION

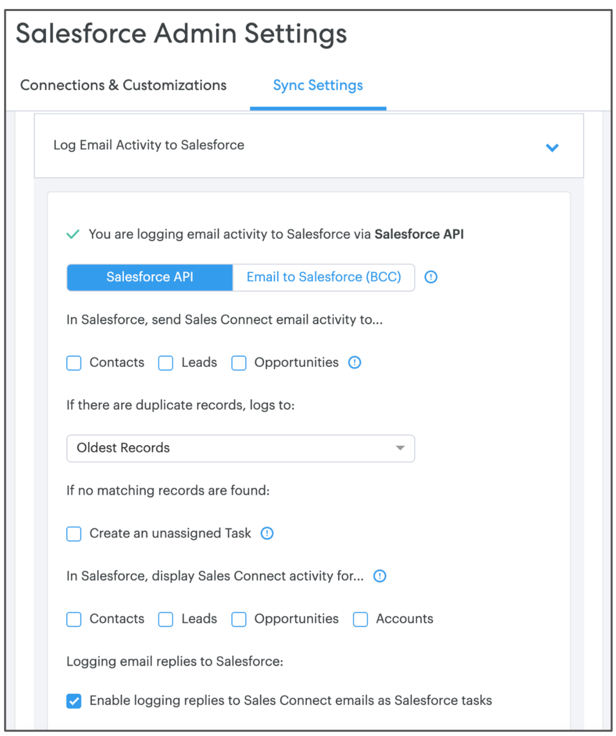
Now that you've set up the Sales Connect experience in Salesforce, it's time to head over to your Sales Connect account.

Every Sales Connect 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)

Sales Connect 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 Connect you can adjust if you log your email activity to Salesforce via API.

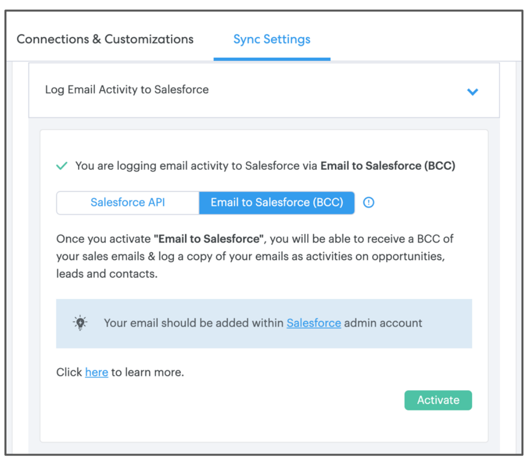
1. You have the option to send your email activity to the Opportunities, Leads and Contacts. We recommend sending email activities to Salesforce on for all of these options.
2. If there are duplicate contact or lead records, you can log the activity to All Records, Oldest Record or Most Activity. We 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 Connect Emails as Salesforce tasks.

All of these settings can be overridden by the Sales Connect Master Admin if you want the team to use the same activity syncing settings.

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

Logging Email Activity via BCC

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 Connect account.



Sales Connect 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 Connect

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

- Use the Sales Gong to celebrate & share when you close deals. Sales Connect 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 Connect & 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 Connect. That means anything created, edited, completed or deleted in Sales Connect will be reflected in Salesforce. Anything created, edited, completed or deleted in Salesforce will be reflected in Sales Connect. These syncs should take about 10 minutes to appear. Do note - enabling this setting will affect your API limits.

Step 5: Once you're done adjusting your all of your settings, click "Save".

Add Sales Connect Outbox

The Sales Connect Outbox allows team members to quickly access all of Sales Connect directly from Salesforce. Through Sales Connect 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 Connect 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 Connect 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 Connect Tip: If your reps do not see the option to add the Sales Connect 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 Connect Outbox first so your team members can add their Sales Connect Outbox to their accounts

5B. SALES CONNECT ACCOUNT ADMIN SETTINGS

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

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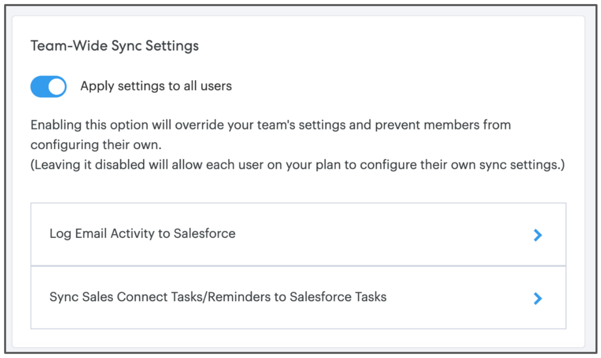

<u>Enable Unsubscribe Syncing with Salesforce</u>

With this setting enabled, any Salesforce Lead or Contact that has been blocked unsubscribed by clicking a block unsubscribe link in a Sales Connect 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 Connect button in Salesforce, any Lead or Contact that is marked as "Email Opt Out" will not be added to the new Sales Connect 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 Connect will not be able to properly update this field with new block unsubscribe information.

Once the above criteria have been fulfilled, this Sales Connect/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.

<u>Override all Salesforce Sync Settings for Your Team</u>

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

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

Congratulations, your set up is complete.