

Getting Started with Sales Engage

If you would rather watch these steps than read them, skip straight to the [Video Instructions](#) below.



Availability

Not all customers have purchased this functionality. Contact your Customer Success Manager for more information.

What's in this article?

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Written Instructions

What You Need to Get Started

- Marketo subscription
- Sales Engage subscription
- Salesforce subscription (with API calls and Apex Classes enabled)

Who You Need to Get Started

- Marketo Admin user
- Sales Engage Admin user
- Salesforce Admin
- Sales Engage users

Sales Engage Admins

You'll receive an email from Marketo with a link to reset your password. After you create a new password, log in to Sales Engage.

To complete setup, you must do the following:

- [Connect Sales Engage and Salesforce](#)
- [Acquire Credentials Prior to Connecting Sales Engage with Marketo](#)
- [Connect Sales Engage with Marketo](#)
- [Invite/Provision Users](#)

Connect Your Sales Engage Account to Salesforce

To connect your Sales Engage account to your Salesforce account, as an Admin or a non-Admin, follow the steps in [this article](#).

Note

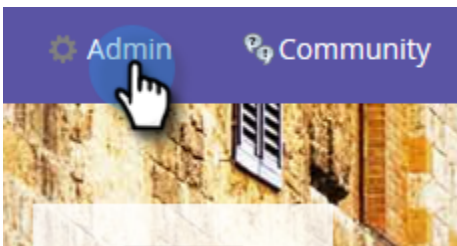
The instance of Salesforce you connect to must be the same instance that is (or will be) connected to Marketo.



Acquiring Credentials Prior to Connecting Sales Engage with Marketo

You'll need to get a set of credentials from within Marketo. These credentials will be used later by the Sales Engage Admin to connect Marketo with Sales Engage.

1. In Marketo, click **Admin**.



2. In the tree, click **Sales Engage**.

- Integration
 - Salesforce
 - Sales Insight
 - Landing Pages
 - Munchkin
 - Web Services
 - LaunchPoint
 - Webhooks
 - Sales Engage
 - Single Sign-On
 - Tags
 - Treasure Chest

3. Select and send the following Marketo credentials to your Sales Engage Admin: Munchkin ID, Client ID, Client Secret.

Sales Engage

Access Integration Details

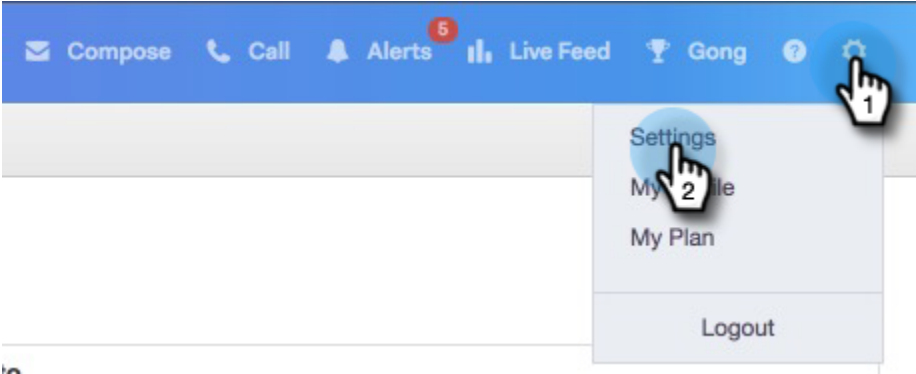
Integration Information	
Munchkin Account ID:	189-JSL-691
Client ID:	eb7cb757-4e4d-4e9d-9b1d-46d6f4063ae7
Client Secret:	0FLx98Uv1parAttA0DkOJGFGuGbb1o06

Note

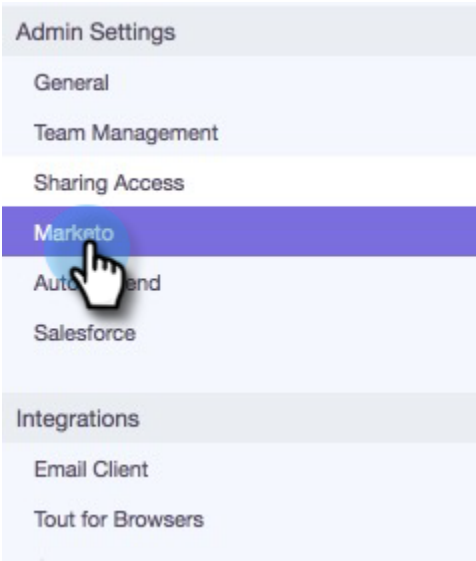
When you copy and paste the above info, make sure no spaces get added.

Connect Sales Engage to Marketo

1. In Sales Engage, click the gear icon and select **Settings**.



2. Under Admin Settings, select **Marketo**.



3. Input the Marketo credentials provided by the Marketo Admin and click **Connect**.

Marketo Admin Settings

Configure and update Marketo settings for your team.

Set Up

Team Access

Set Integration Permissions

Your Sales Engage & Marketo accounts have already been connected.

Munchkin ID



Client ID



Client Secret



Connect



Invite/Provision Users

If any users already exist on your account (previously from ToutApp), they'll show up in the **Team Access** tab of the Marketo section of Sales Engage.

You can provision your team as a Marketo Sales Engage User from this page. If you've never used ToutApp, or have yet to invite users, follow the steps in [this article](#).

Caution

Please wait ten minutes after connecting Sales Engage with Marketo before performing these steps.



1. Select one or more users, then click **Connect**.

Note

You can only do the workspace assignment once at the time of inviting users. After it's set, you'll have to disconnect the user in order to change it.



Marketo Admin Settings

Configure and update Marketo settings for your team.

Set Up **Team Access**

You've selected all | [Clear selection](#)

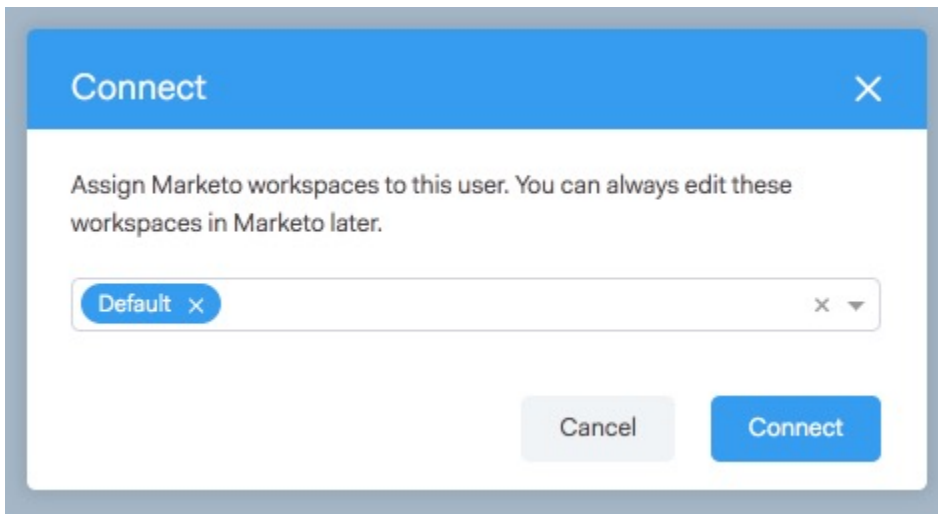
Connect (1)

Disconnect (1)

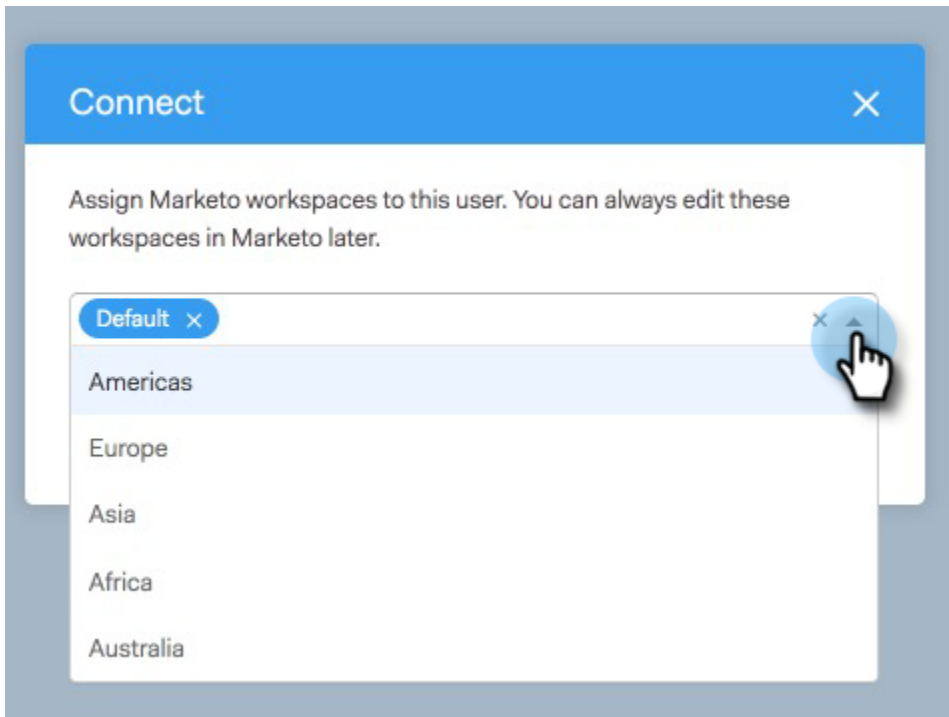
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<input type="checkbox"/>	Name	Title	Access
<input checked="" type="checkbox"/>	Ambika Shetty	SDR	Marketo Sales Engage User
<input type="checkbox"/>	Andy Paul		Marketo Sales Engage Admin User

2. If your Marketo subscription has workspaces enabled, you'll be able to assign workspaces to each user or set of users in bulk. If no workspaces are selected, we'll assign them to the Default Marketo workspace.



3. Click the Workspace drop-down, select your desired workspace(s), and click **Connect**.



Note

If you want to add new users, go to the Team Management section of Admin Settings and click the **Invite Users** button.

You can add additional users from the Team Management page and follow the steps above to get them connected.

Video Instructions