

Install Salesforce Customization for Professional Edition Customers

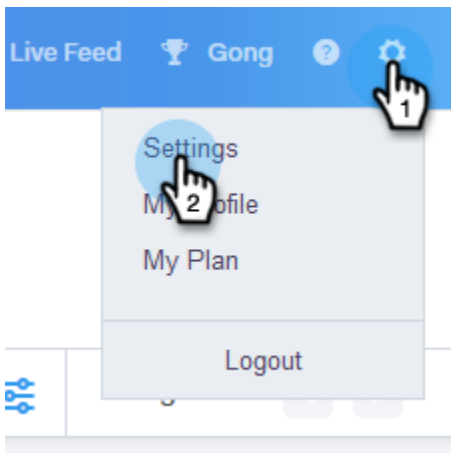
Customers with Salesforce Professional Edition will have to follow these steps to install customization.

Prerequisites

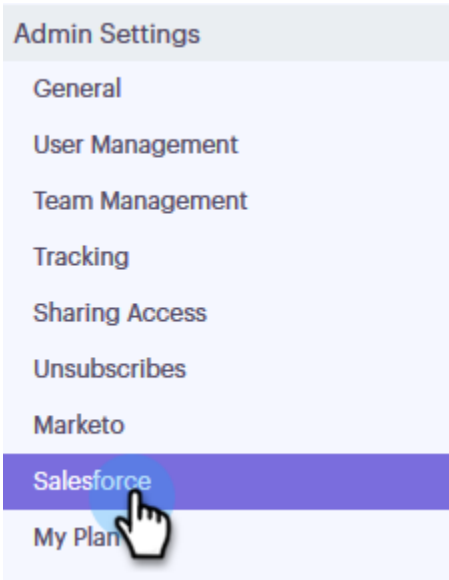
- Sales Connect Admin needs to connect their Salesforce and Sales Connect accounts.
- Salesforce Instance used needs to have space to install thirteen Custom Activity Fields.

Installation

1. In Sales Connect, click the gear icon on the upper-right and select **Settings**.



2. Under Admin Settings, click **Salesforce**.



3. Verify you are connected to your Salesforce account.



Caution

If you are connected, you'll see a green "Install" button. **DO NOT** click this button, proceed to step 4 instead.

4. Log-in to the Salesforce account you are connected to and then click [this link](#).

5. You'll be sent to the Sales Connect Installation page.



Install MarketoSalesEngageV1.0

By Marketo Sales Engage



What if existing component names conflict with ones in this package?

- Do not install.
- Rename conflicting components in package.



Install for Admins Only



Install for All Users



Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
MarketoSalesEngageV1.0	Marketo Sales Engage	MSESept2018	1.0

[Additional Details](#) [View Components](#)

6. Choose the users you would like to install customizations for: Admin only, all users, or specific profiles.

7. Click on the **Install** button to install customization.

8. To confirm successful installation, log-in to your Salesforce account.

9. Click **Setup**, search for "Installed Packages" in the search bar, and click **Installed Packages**.

You will see Marketo Sales Connect Customizations there.

In order to configure Sales Connect in your Salesforce instance, please follow the steps starting from "CONFIGURING THE SALES ENGAGE SALESFORCE PACKAGE" section on page 7 of the Installation Guide.

[Installation Guide for Salesforce Classic](#)

[Installation Guide for Salesforce Lightning](#)

