

Sales Insight for Non-Native Salesforce Integrations

If your Marketo account is connected to Salesforce through a customized or non-native integration, use this document to configure Sales Insight.



Availability

This feature is currently in Beta. If you'd like to participate, please reach out to your Customer Success Manager and request they enable the "MSI Non-Native" feature for your Marketo instance.

Prerequisites

- A Salesforce account with MSI Package set-up.
- Marketo REST API [successfully set up](#). The exposed CRUD APIs will be the basis of performing the non-native sync.
- Read [this blog post](#) in order to get an understanding of the object and relationships.
- Set up Salesforce objects to display the 18 character case-insensitive globally unique identifier rather than the 15 character case-sensitive globally unique identifier.



Note

The REST API Configuration in the Marketo MSI Admin Panel cannot be used for the Non-Native sync.

Successful non-native sync for MSI requires the following

1. Sync the Salesforce Sales User to Marketo.

The Salesforce Sales User is an external user that owns the Leads/Contacts in Salesforce. A Marketo Sales Person needs to be upserted for the Salesforce Sales User. The *externalSalesPersonId* field is mandated for the upsert of the Sales Person.

Marketo Sales Person Field	Salesforce Sales User Field	Description
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externalSalesPersonId	Salesforce Sales User case-insensitive globally unique identifier	Identifies the Marketo Sales Person record to an external Salesforce Sales User object. It's mandated that the Sales Person be synced first before syncing the other objects so that the proper relationships will be created.
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API documentation for Sales Person: <https://developers.marketo.com/rest-api/lead-database/sales-persons/>

API documentation for syncing the Sales Person: https://developers.marketo.com/rest-api/endpoint-reference/lead-database-endpoint-reference/#!/Sales_Persons/syncSalesPersonsUsingPOST

2. Sync the Salesforce Accounts to Marketo.

A Marketo Company will need to be upserted for the Salesforce Account. The *externalCompanyId* and *externalSalesPersonId* fields are mandated for the upsert of the Company.

Marketo Company Field	Salesforce Account Field	Description
externalCompanyId	Salesforce Account case-insensitive globally unique identifier	Identifies a Marketo Company record to an external Salesforce Account object.
externalSalesPersonId	Salesforce Sales User case-insensitive globally unique identifier	Identifies a Marketo Company record to an external Salesforce Sales User object who is the Account owner. Also used within Marketo to associate the Company to the Sales Person who owns the Company record. It is mandated to have the Sales Person synced first before setting this field.

API documentation for Companies: <https://developers.marketo.com/rest-api/lead-database/companies/>

API documentation for syncing Companies: <https://developers.marketo.com/rest-api/endpoint-reference/lead-database-endpoint-reference/#!/Companies/syncCompaniesUsingPOST>

3. Sync the Salesforce Leads/Contacts to Marketo.

You will need to upsert a Marketo Lead for the Salesforce Lead/Contact. The *externalPersonId*, *externalSalesPersonId*, and *externalCompanyId* fields are mandated for the upsert of the Lead.

Marketo Lead Field	Salesforce Lead/Contact Field	Description
externalPersonId	Salesforce Lead/Contact case-insensitive globally unique identifier	Identifies the Marketo Lead record to an external Salesforce Lead/Contact object. This is a new field that is introduced for MSI Non-Native.
externalSalesPersonId	Salesforce Sales User case-insensitive globally unique identifier	Identifies the external Salesforce Sales User object who owns this Lead/Contact. Also relates the Lead with the Sales Person in Marketo. It is mandated to have the Sales Person correctly synced first.

externalCompanyId	Salesforce Account case-insensitive globally unique identifier	Identifies the external Salesforce Account object that the Lead/Contact belongs to. Also relates the lead record to a Company in Marketo. It is mandated that the Salesforce Account be correctly synced first.
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API documentation for Leads: <https://developers.marketo.com/rest-api/lead-database/leads/>

API documentation for syncing Leads: <https://developers.marketo.com/rest-api/endpoint-reference/lead-database-endpoint-reference/#!/Leads/syncLeadUsingPOST>

4. Sync Salesforce Opportunities to Marketo.

You will need to upsert a Marketo Opportunity for the Salesforce Opportunity. The *externalOpportunityId*, *externalCompanyId*, and *externalSalesPersonId* fields are mandated for the upsert of the Opportunity.

Marketo Opportunity Object Field	Salesforce Opportunity Object Field	Description
externalOpportunityId	Salesforce Lead/Contact case-insensitive globally unique identifier	Identifies the Marketo Opportunity record to an external Salesforce Opportunity object.
externalCompanyId	Salesforce Account case-insensitive globally unique identifier	Identifies the external Salesforce Account object which this Opportunity belongs to. It is mandated that the Salesforce Account be correctly synced first.
externalSalesPersonId	Salesforce Sales User case-insensitive globally unique identifier	Identifies the external Salesforce Sales User object who owns this Opportunity.

API documentation for Opportunity: <https://developers.marketo.com/rest-api/lead-database/opportunities/>

API documentation for syncing Opportunities: <https://developers.marketo.com/rest-api/endpoint-reference/lead-database-endpoint-reference/#!/Opportunities/syncOpportunitiesUsingPOST>

5. Sync Salesforce Contact Roles to Marketo.

Salesforce Contact Roles for a Salesforce Opportunity can be then synced via the Marketo Opportunity Role. The Opportunity Role record mandates the *externalOpportunityId*, *role*, and *leadId* fields.

Marketo Opportunity Role Field	Salesforce Contact Role Field	Description
externalOpportunityId	Salesforce Opportunity case-insensitive globally unique identifier	Identifies the Marketo Opportunity Role to an external Salesforce Opportunity object. It is mandated that the Salesforce Opportunity be correctly synced first.

leadId	N/A, this would be a Marketo Lead ID	This would be the Marketo Lead ID of the synced Salesforce Contact. Once the contact is synced in Marketo, you can use the Salesforce Contact case-insensitive globally unique identifier as the externalPersonId and query for the Marketo Lead using the Marketo REST API.
role	The Role field for the Salesforce Contact	Describes the role of the contact for this opportunity.

API documentation for Opportunity: <https://developers.marketo.com/rest-api/lead-database/opportunities/>

API documentation for syncing Opportunities: <https://developers.marketo.com/rest-api/endpoint-reference/lead-database-endpoint-reference/#!/Opportunities/syncOpportunitiesUsingPOST>

6. Sync Last Interesting Moment/MSI Scoring fields to SFDC.

Once your Salesforce objects are correctly synced to Marketo, you can then take advantage of the MSI features. The MSI Last Interesting Moment/Scoring fields will be exposed in the REST API for Leads. These fields are calculated by MSI and are read-only.

The Last Interesting Moment/Scoring fields of a Marketo Lead will need to be regularly synced to Salesforce by using the REST API Lead endpoint. Query this endpoint for a Marketo Lead using the *externalPersonId* as the filterType and passing in the Salesforce Lead GUID as the filterValue.

```
GET /rest/v1/leads.json?filterType=externalPersonId&filterValues=salesforceLeadId1,salesforceLeadId2
```

You can then use the values of these fields to sync to your Salesforce Lead/Contact object.

Marketo Lead Field	Salesforce Lead/Contact Field	Description
msiLastInterestingMomentType	Label: Last Interesting Moment Type Name: Last_Interesting_Moment_Type__c	Type of the last interesting moment for the Lead
msiLastInterestingMomentDate	Label: Last Interesting Moment Date Name: Last_Interesting_Moment_Date__c	Date of the last interesting moment for the Lead
msiLastInterestingMomentDesc	Label: Last Interesting Moment Description Name: Last_Interesting_Moment_Desc__c	Description of the last interesting moment for the Lead
msiLastInterestingMomentSource	Label: Last Interesting Moment Source Name: Last_Interesting_Moment_Source__c	Source of the last interesting moment for the Lead
priority	Label: Engagement Name: Priority__c	Priority of the Lead
relativeUrgency	Label: Relative Urgency Value Name: Urgency_Value__c	Relative Urgency of the Lead
relativeScoring	Label: Relative Scoring Value Name: Relative_Score_Value__c	Relative Scoring of the Lead

Documentation for the Lead REST API: <https://developers.marketo.com/rest-api/endpoint-reference/lead-database-endpoint-reference/#!/Leads/getLeadByIdUsingGET> .

Proper use of the external fields is key to a successful non-native sync. If you fail to see data in some of the views, it is likely that a certain field was not correctly synced. For example, if a lead's activities and interesting moments don't show up when looking in the MSI widget under their Account, it is likely that either the lead's company or the Account was not correctly synced. Performing a GET request for this lead while specifying the external fields will help you verify whether the lead was correctly synced. Moreover, the email for the external sales person in Marketo must match the email for that user in Salesforce. Data may not show in the Marketo tab in Salesforce if the emails do not match.