



Informatica® Cloud Application Integration
September 2024

Synchronize Salesforce Leads with Marketo Leads

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Publication Date: 2024-10-01

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Preface

Use *Synchronize Salesforce Leads with Marketo Leads* to learn how to synchronize Salesforce leads with Marketo leads. This guide assumes that you have an understanding of the Salesforce Connector and Marketo Connector concepts.

CHAPTER 1

Introduction to Synchronize Salesforce Leads with Marketo Leads recipe

The Synchronize Salesforce Leads with Marketo Leads recipe is a platform event-based recipe.

When a lead is created or updated in Salesforce, a Salesforce Change Data Capture event triggers the process. The process checks whether the email for the Salesforce lead exists in Marketo. If the lead email doesn't exist, the process displays an error. If the lead email exists, the process searches for leads by the Salesforce ID in Marketo and creates or updates the leads based on the search results. The process requires Secure Agent and Salesforce Change Data Capture configuration.

Note: The recipe assumes that email is the only required field for leads.

Prerequisites

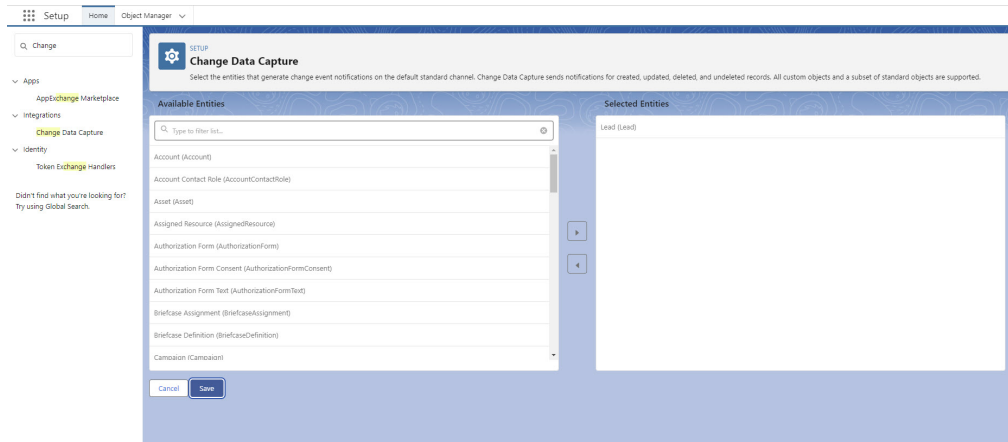
To synchronize a Salesforce lead with a Marketo lead, the following prerequisites must be met:

- Configure Salesforce Change Data Capture (CDC) event.
- Create a custom field in Marketo.

Configuring Salesforce Change Data Capture

Configure Salesforce Change Data Capture (CDC) to send a message when the lead object changes.

1. Log in to the Salesforce account.
2. Go to **Setup** and search for Change Data Capture in the **Find** box.
3. Select **Lead (Lead)** object from the **Available Entities** list and add it to the **Selected Entities** list. The following image shows the **Change Data Capture** page:



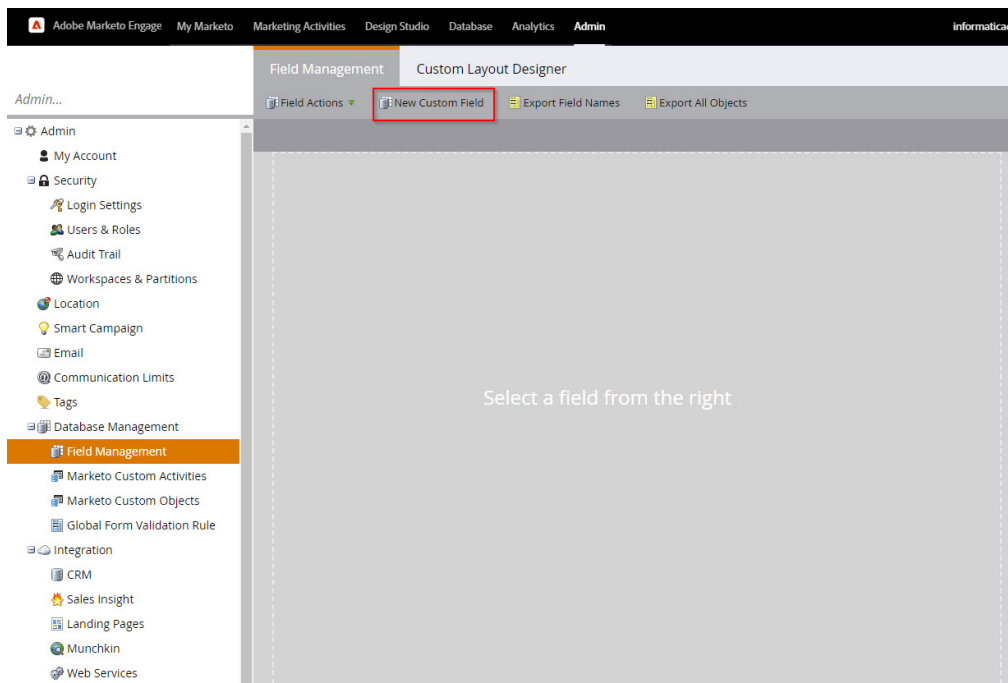
4. Click **Save**.

Creating a custom field in Marketo

Create a custom field in Marketo to store the Salesforce ID.

1. Log in to the Marketo organization.
2. Go to **Admin > Field Management**, and then click **New Custom Field**.

The following image shows the **New Custom Field** button on the **Field Management** page:



3. In the **New Custom Field** page, enter the object, type, name, and API name values as shown in the following image, and then click **Create**.

The image shows a 'New Custom Field' dialog box with the following fields and values:

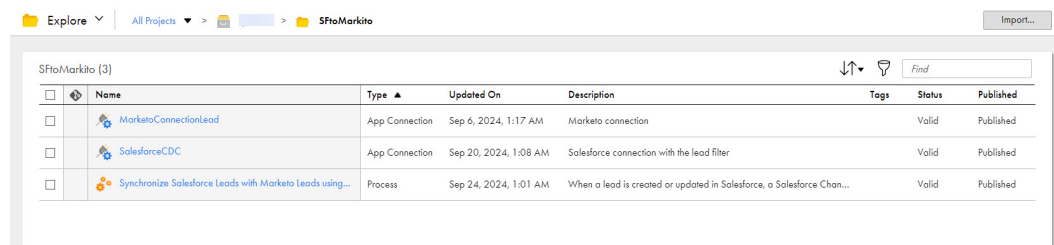
Field	Value
Object	- Lead -
Type	String
Name	Salesforce ID
API Name	salesforceID

Buttons: CANCEL, CREATE

CHAPTER 2

Synchronize Salesforce Leads with Marketo Leads recipe contents

The Synchronize Salesforce Leads with Marketo Leads recipe contains app connections and a process. The following image shows the assets that the Synchronize Salesforce Leads with Marketo Leads recipe package contains:



Name	Type	Updated On	Description	Tags	Status	Published
MarketoConnectionLead	App Connection	Sep 6, 2024, 1:17 AM	Marketo connection		Valid	Published
SalesforceCDC	App Connection	Sep 20, 2024, 1:08 AM	Salesforce connection with the lead filter		Valid	Published
Synchronize Salesforce Leads with Marketo Leads using...	Process	Sep 24, 2024, 1:01 AM	When a lead is created or updated in Salesforce, a Salesforce Chan...		Valid	Published

Synchronize Salesforce Leads with Marketo Leads recipe assets

The following table lists the assets that the Synchronize Salesforce Leads with Marketo Leads recipe package contains:

Asset Name	Asset Type	Description
MarketoConnectionLead	App connection	Marketo connection.
SalesforceCDC	App connection	Salesforce connection with the lead filter.
Synchronize Salesforce Leads with Marketo Leads using CDC	Process	When a lead is created or updated in Salesforce, a Salesforce Change Data Capture event triggers the process. The process checks whether the email for the Salesforce lead exists in Marketo. If the lead email doesn't exist, the process displays an error. If the lead email exists, the process searches for leads by the Salesforce ID in Marketo and creates or updates the leads based on the search results. The process requires Secure Agent and Salesforce Change Data Capture configuration.

CHAPTER 3

Using the Synchronize Salesforce Leads with Marketo Leads recipe

To use the Synchronize Salesforce Leads with Marketo Leads recipe, you must perform the following steps manually:

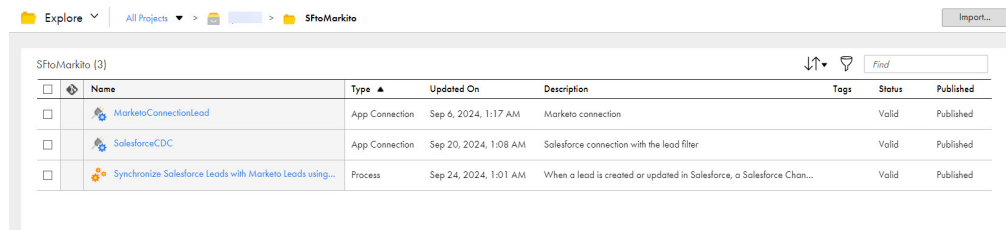
- Step 1: Copy and access the recipe
- Step 2: Configure and publish the Salesforce connection
- Step 3: Configure and publish the Marketo connection
- Step 4: Configure and publish the process

Step 1: Copy and access the recipe

Copy the pre-configured assets in the recipe to a separate project or folder.

1. Open the **Synchronize Salesforce Leads with Marketo Leads** recipe and click **Use**.
2. Select the location where you want to copy the recipe, and then click **Continue**.
3. In the **Copying the recipe** dialog box, click **OK**.
It might take some time for the recipe to get copied. You will receive a notification when the recipe is ready for use.
4. After the recipe is copied, click **Explore** to access the recipe content.
5. Navigate to the project or folder where you copied the recipe or enter the recipe name in the **Find** box.

All the assets in the recipe are displayed as shown in the following image:



The screenshot shows the SFtoMarketo interface with a table of assets. The table has columns for Name, Type, Updated On, Description, Tags, Status, and Published. The assets listed are:

Name	Type	Updated On	Description	Tags	Status	Published
MarketoConnectionLead	App Connection	Sep 6, 2024, 1:17 AM	Marketo connection		Valid	Published
SalesforceCDC	App Connection	Sep 20, 2024, 1:08 AM	Salesforce connection with the lead filter		Valid	Published
Synchronize Salesforce Leads with Marketo Leads using...	Process	Sep 24, 2024, 1:01 AM	When a lead is created or updated in Salesforce, a Salesforce Chan...		Valid	Published

Step 2: Configure and publish the Salesforce connection

Configure the user credentials, object filter, and event consumer details in the SalesforceCDC connection, and then publish the connection.

1. Open the **SalesforceCDC** connection.
2. From the **Run On** list, select the **Secure Agent**.
3. In the **Authentication Type** field, select **OAuth** or **Password** as required.

Based on the authentication type selected, perform one of the following steps:

- For **Password** authentication, enter values for the following properties:
 - User Name: Salesforce developer account user name.
 - Password: Salesforce developer account password.
 - Security Token: Salesforce security token.
- For **OAuth** authentication, enter values for the following properties:
 - Authentication URL: Endpoint used to make OAuth authorization requests to Salesforce.
 - Token Request URL: Endpoint used to make OAuth token requests to Salesforce.
 - Session Duration: Number of minutes after which the OAuth token expires.
 - Authorize access: Click **Authorize** > enter Salesforce developer account credentials > click **Allow**.

The OAuth authentication process starts. You can check the current authorization status in the **Authorization Status** property.

4. In the **Connection Properties** section, enter the **Object Filter** field value as **Lead**.
5. Add an event source on the **Event Sources** tab, and in the **Event Consumer** field, enter `/data/LeadChangeEvent`. With this, the CDC sends a message when the lead object changes.
6. Save and publish the connection.

Step 3: Configure and publish the Marketo connection

Configure the host name, client details, and grant type in the MarketoConnectionLead connection, and then publish the connection.

1. Open the **MarketoConnectionLead** connection.
2. From the **Type** list, select **Marketo**.
3. From the **Run On** list, select **Cloud Server or any Secure Agent**.

4. In the **Connection Properties** section, enter values for the following properties:

Property	Description
hostName	The munchkin ID of the Marketo instance.
client_id	The Marketo client ID to generate a valid access token. You can find the client ID under the Admin > Integration > Launchpoint menu in Marketo.
client_secret	The Marketo client secret that you generated under the Admin > Integration > Launchpoint menu in Marketo.
grant_type	The grant type that is used by the Marketo instance to get an access token for authorizing third-party clients. Enter the value as client_credentials .

5. Save and publish the connection.

Step 4: Configure and publish the process

Configure the Secure Agent and publish the process.

1. Open the **Synchronize Salesforce Leads with Marketo Leads using CDC** process.
2. On the **Start** tab of the Start step, select **Event** in the **Binding** field.
3. In the **Event Source Name** field, select the event source that you added in the **SalesforceCDC** connection.
4. From the **Run On** list, select the Secure Agent.
5. Save and publish the process.

When a lead is created or updated in Salesforce, a Salesforce Change Data Capture event triggers the process. The process receives a message from Salesforce with an event. The process extracts the lead ID and retrieves full information based on the lead ID. The process then checks whether the record contains an email. If the email is missing, the process displays an error. Otherwise, the process performs a search in the database using the custom Salesforce ID field in Marketo. If the Salesforce ID exists in Marketo, the lead is updated. Otherwise, a new record is created and the lead details are synchronized with a Marketo lead.