



DataSheet:

# Marketo & NetSuite Integration Using Muv



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# Integration Flows

You can easily configure Muv to support a personalized integration. This includes synchronizing custom fields and lists—which fields and lists to synchronize as well as how and when.

However, the primary driver of integration at the record level is your NetSuite CRM configuration—specifically, how you have decided to use NetSuite to track leads.

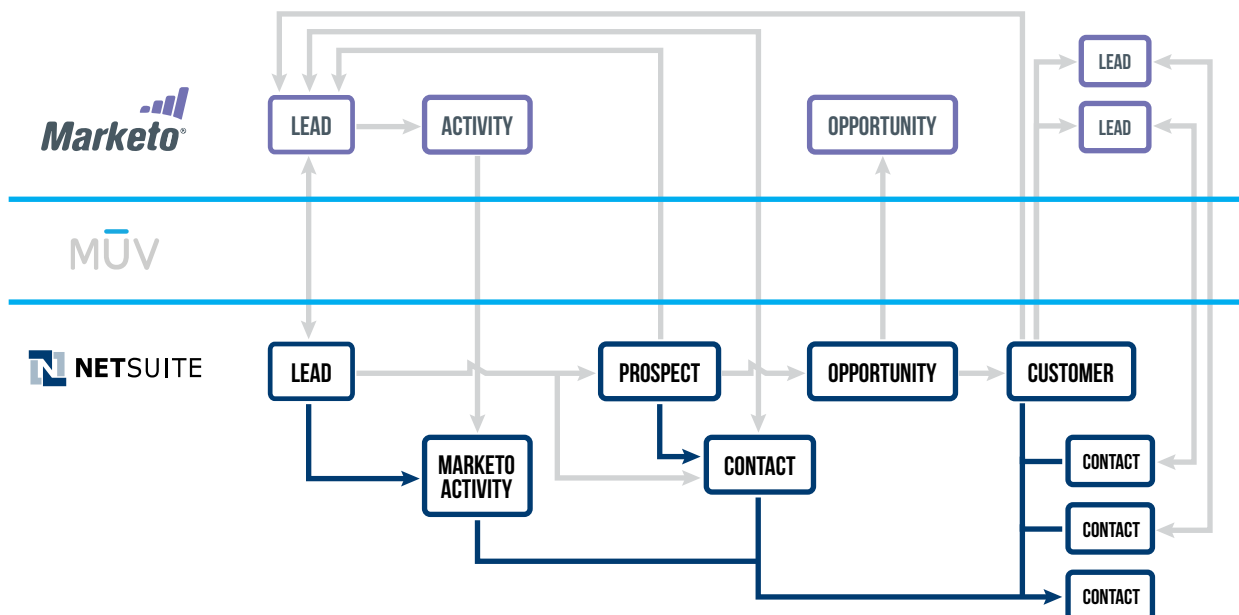
Below are examples are examples of how Muv handles a bi-directional integration between NetSuite CRM and Marketo. There are three examples—one for each of the three core options you have for configuring lead tracking in NetSuite CRM.

## Option 1

### Leads are Converted from Individuals to Companies (Lead Conversion)

You have configured NetSuite to track Leads as individuals, then convert them to companies (while attaching a contact record to the company) when a sales record is associated with the Lead, such as an opportunity.

*Muv Integration Flow Using NetSuite Lead Conversion*

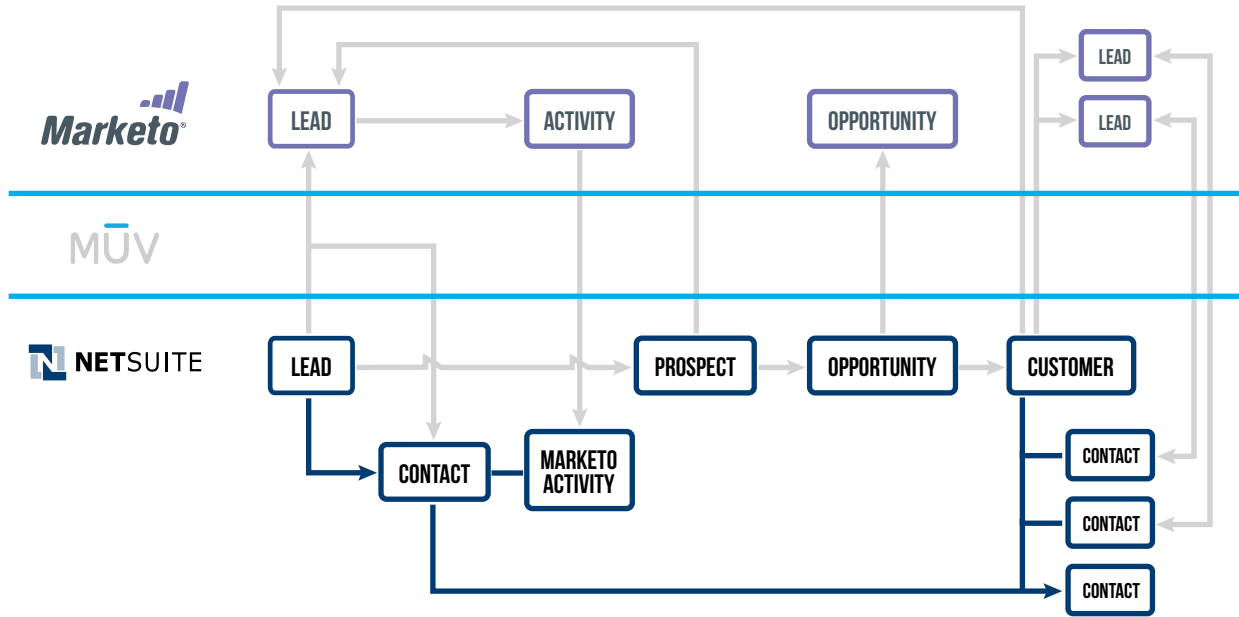


# Option 2

## Leads are Treated as Companies with Contacts

You have configured NetSuite to track Leads as companies that have contact records associate with the Lead/Company.

*Muv Integration Flow Using NetSuite Leads as Companies with Contacts*

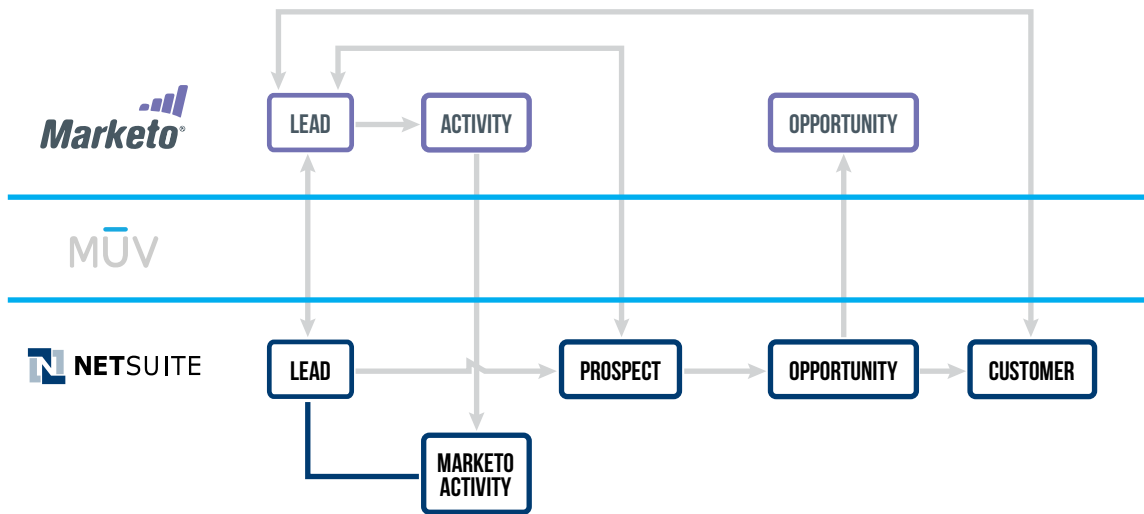


# Option 3

## Leads are Treated as Individuals, Not Companies

You have configured NetSuite to track Leads as individuals instead of companies. In addition, every Lead is a single person.

*Muv Integration Flow Using NetSuite Leads/Customers as Individuals (No Contacts)*



# NetSuite Bundle

Marketo and NetSuite integration with Muv is supported by a bundle installed in your NetSuite account.

This bundle provides a structure for organizing Marketo application data within NetSuite. It also provides custom analytics on Marketo activity and interesting moments—right within the context of the sales rep’s NetSuite dashboard.

## Sales Insight Dashboard

Stars and Flames represent Marketo Lead Score and the recent Interesting Moments/Marketo Activity associated with leads in NetSuite. These attributes are dynamic and constantly updated by Muv from your Marketo account.

This dashboard is viewable within a sales rep’s NetSuite context, so each sales rep sees a custom qualification and activity view of their leads.

Lead	Company	Last Interesting Moment	Status	Last Activity Time	Lead Score	Priority	Urgency
<a href="#">CU2882</a>	Frank's Shop	Submitted the Free Trial Request Form.	LEAD-New	4/19/2013 12:19:34 pm	50	★★★★	🔥🔥🔥
<a href="#">CU2881</a>	Jimmy's Shop	Submitted the Free Trial Request Form.	LEAD-New	4/19/2013 11:42:32 am	50	★★★★	🔥🔥🔥
<a href="#">CU2880</a>	NY Mets	Submitted the Free Trial Request Form.	LEAD-New	4/9/2013 8:16:39 am	50	★★★★	🔥🔥
<a href="#">CU2879</a>	Google	Submitted the Free Trial Request Form.	LEAD-New	4/2/2013 1:30:29 pm	50	★★★★	🔥
<a href="#">CU2555</a>	ABC208	Attended 2012 SuiteWorld trade show.	LEAD-New	1/10/2013 11:23:40 am	25	★	🔥
<a href="#">CU1741</a>	Bobs Strollers	Submitted the Free Trial Request Form.	LEAD-New	1/25/2013 12:22:21 pm	50	★★★★	🔥
<a href="#">CU2559</a>	ABC212	Attended 2012 SuiteWorld trade show.	LEAD-New	1/10/2013 11:23:40 am	25	★	🔥
<a href="#">CU2552</a>	ABC205	Attended 2012 SuiteWorld trade show.	LEAD-New	1/10/2013 11:23:40 am	25	★	🔥
<a href="#">CU2561</a>	ABC214	Attended 2012 SuiteWorld trade show.	LEAD-New	1/10/2013 11:23:40 am	25	★	🔥
<a href="#">CU2562</a>	ABC215	Attended 2012 SuiteWorld trade show.	LEAD-New	1/10/2013 11:23:40 am	25	★	🔥
<a href="#">CU2878</a>	Marketo Demo Company	Submitted the Free Trial Request Form.	LEAD-New	3/26/2013 9:12:24 am	50	★★★★	🔥
<a href="#">CU1737</a>	Cyclo Doc	Submitted the Free Trial Request Form.	LEAD-New	1/18/2013 4:58:06 pm	50	★★★★	🔥
<a href="#">CU2560</a>	ABC213	Responded to SuiteWorld follow-up email campaign.	LEAD-New	1/10/2013 4:09:47 pm	30	★★★	🔥
<a href="#">CU1735</a>	U of Texas	Submitted the Free Trial Request Form.	LEAD-New	1/29/2013 11:29:57 am	50	★★★★	🔥
<a href="#">CU2564</a>	ABC217	Responded to SuiteWorld follow-up email campaign.	LEAD-New	1/10/2013 4:09:47 pm	30	★★★	🔥
<a href="#">CU2572</a>	USA Racing	Submitted the Free Trial Request Form.	LEAD-New	1/16/2013 10:18:49 am	30	★★★	🔥
<a href="#">CU1734</a>	Kaplan Intelligence	Submitted the Free Trial Request Form.	LEAD-New	1/17/2013 5:59:06 am	30	★★★	🔥
<a href="#">CU2575</a>	Awesome Lawns Inc.	Submitted the Free Trial Request Form.	LEAD-New	1/16/2013 10:03:56 am	30	★★★	🔥
<a href="#">CU2589</a>	Notre Dame	Submitted the Free Trial Request Form.	LEAD-New	1/21/2013 10:20:21 am	30	★★★	🔥

# Marketo Activity Feed

The Marketo Activity Feed is a constantly updated list of all the Marketo activities associated with leads. This includes descriptions of the activity and the date it occurred in Marketo.

This dashboard is viewable within a sales rep's NetSuite context, so each sales rep sees a custom activity view of their leads.

**My Marketo Feed:** From-To: 4/19/2013 — 1/17/2013 Total Found: 38

Lead	Activity	Activity Date
CU2682 Frank Cheung	<a href="#">Submitted the Free Trial Request Form.</a>	4/19/2013
CU2681 Jimmy Cheung	<a href="#">Submitted the Free Trial Request Form.</a>	4/19/2013
CU2680 Darryl Strawberry	<a href="#">Submitted the Free Trial Request Form.</a>	4/9/2013
CU2679 Michael James	<a href="#">Submitted the Free Trial Request Form.</a>	4/2/2013
CU2678 Art Ardolino	<a href="#">Submitted the Free Trial Request Form.</a>	3/26/2013
CU2677 Matt Delauro	<a href="#">Submitted the Free Trial Request Form.</a>	3/20/2013
CU2574 Don Mattingly	<a href="#">Submitted the Free Trial Request Form.</a>	3/13/2013
CU2524 Nina Hatton	<a href="#">Submitted the Free Trial Request Form.</a>	2/27/2013
CU1738 Mark NetSuite	<a href="#">Submitted the Free Trial Request Form.</a>	2/15/2013
CU1735 Ricky Williams	<a href="#">Submitted the Free Trial Request Form.</a>	1/29/2013
CU1741 Dan Smith	<a href="#">Submitted the Free Trial Request Form.</a>	1/25/2013
CU2589 Manti Te'o	<a href="#">Submitted the Free Trial Request Form.</a>	1/21/2013
CU1737 Michele Ferrari	<a href="#">Submitted the Free Trial Request Form.</a>	1/18/2013
CU2590 Match.com	<a href="#">Submitted the Free Trial Request Form.</a>	1/17/2013
CU1734 George Kaplan	<a href="#">Submitted the Free Trial Request Form.</a>	1/17/2013

# Custom Marketo Tab, Fields, & Lists

All synched Marketo activities, including interesting moments are brought into a consolidated tab for every lead, prospect, and customer in your NetSuite account. This tab, all fields, and all lists can be viewed, edited, or restricted using native NetSuite role-based access control settings.

**Lead: CU2584 Ali Mills (Karate Kid Inc)**

Customer ID: CU2584 Ali Mills | Address: 1322 Main, Los Angeles CA 5555 | Category: -With Active Contract

Company Name: Karate Kid Inc | Type: Individual | Status: LEAD-Qualified

Mr./Ms.: | Name: Ali Mills | Sales Rep: TNO Dema

Customer is Inactive:  | CSV Account Number: | Move Customer to: | Company Type: | Customer Stage: Lead

Information | **Marketo** | Address | Financial | Access | Workflow | Collections | Info | Contracts\* | Vendor Rebate\*

Lead Score: 150 | Last Interesting Moment: Contact 1-800 Muv Sales number. | Last Interesting Moment Date: 1/19/2013 4:06:59 pm

Market Lead ID: 137

New Marketo Activity | Attach | Customize View

Edit	Name	ID	Contact	Activity Type	Activity Date Time	Remove
Edit	Change Score: Lead Score	1006		Change Score	1/10/2013 4:06:59 pm	Remove
Edit	Change Score: Lead Score	209		Change Score	12/18/2012 2:39:46 pm	Remove
Edit	Change Score: Lead Score	217		Change Score	12/18/2012 2:42:59 pm	Remove
Edit	Change Status in Progression: Free Trial Request	206		Change Status in Progression	12/18/2012 2:39:41 pm	Remove
Edit	Change Status in Progression: Free Trial Request	214		Change Status in Progression	12/18/2012 2:42:56 pm	Remove
Edit	Contact 1-800 Muv Sales number.	1007		Interesting Moment	1/10/2013 4:06:59 pm	Remove
Edit	Fill Out Form: Free Trial Request Form	215		Fill Out Form	12/18/2012 2:42:59 pm	Remove
Edit	Fill Out Form: Free Trial Request Form	207		Fill Out Form	12/18/2012 2:39:41 pm	Remove
Edit	Visit Webpage: FreeTrial	216		Visit Webpage	12/18/2012 2:42:57 pm	Remove
Edit	Visit Webpage: FreeTrial	208		Visit Webpage	12/18/2012 2:39:43 pm	Remove

# Connecting to NetSuite & Marketo

## How We Connect to NetSuite

Muv requires a NetSuite employee record and Role (with access) to integrate data via web services into and out of NetSuite. This role must have edit level access to all records and fields included in the integration.

Below are best practice recommendations for configuring Muv to connect to NetSuite.

### **Global Preferences**

For Muv to communicate with NetSuite you must enable the “SuiteTalk (Web Services)” feature in your NetSuite account. This can be done by an administrator navigating to Setup>Company>Enable Features>SuiteCloud from the NetSuite homepage.

### **Employee Setup**

**Employee Name:** Muv (first), Integration (last)

**Employee Email:** clientcompany@muvdata.com

### **Admin Access**

The best practice is to provide Muv with an administrative role during implementation and then customize it to be “Web Services Only” once the integration is live.

## How We Connect to Marketo

Muv requires the SOAP endpoint and API username from your Marketo Account. This can be found by navigating to Admin>SOAP API.

### **System Preferences**

Muv and your Marketo account work together right out of the box. You do not need to enable, disable, or modify any preferences or configuration in your Marketo Account!



## Contact

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