

**EverString + Marketo Integration Documentation**



## Overview

Predictive Lead Scoring by EverString helps Marketo and Salesforce users to prioritize their existing and inbound prospects. Prioritization engagement scores are provided by EverString's Predictive Customer Model (PCM), which is built by analyzing the activities data of leads in Marketo.

## Prerequisite

- Install the Predictive Lead Scoring by EverString package in your Salesforce org. Please refer to the EverString Salesforce App document for the installation steps.

- Install the Marketo Lead Management App in your Salesforce org:

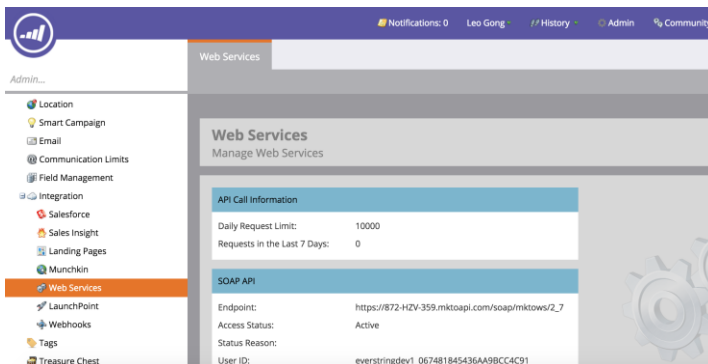
<https://appexchange.salesforce.com/listingDetail?listingId=a0N300000016beeEAA>

- Set up the synchronization between Salesforce and Marketo following the instructions in this installation guide provided by Marketo:

<http://pages2.marketo.com/rs/marketob2/images/Marketo-and-SFDC-for-New-Customers.pdf>

## Marketo Configuration Steps

1. Check whether the EverString fields - Lead Engagement Score and Contact Engagement Score are synced from Salesforce to Marketo
2. Send EverString the SOAP API credentials of your Marketo instance.  
Go to Admin -> Web Service.



3. EverString CSR will contact you once the model is built and the lead engagement scores are ready to be pushed into Marketo.
4. Set up the sync from Marketo to Salesforce so the Lead Engagement Score will be synced to Salesforce from Marketo.

## Salesforce Configuration Steps

1. Map the Lead Engagement Field on Leads to the Contact Engagement Filed on Contacts. From Setup, click **Customize -> Leads -> Fields -> Map Lead Fields**.

### Lead Custom Field Mapping

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Map each of your organization's lead custom fields to one of your custom account, contact, or opportunity fields. These mappings will be used when you convert leads.

Lead Custom Field Mapping	
Take this lead custom field...	...and map it to this field
Company Rating	--None--
Company Score	Contact.Company Score
Contact Engagement Rating	--None--
Contact Engagement Score	--None--
Contact Rating	--None--
Contact Score	--None--

2. Set the score bands in Salesforce for Lead Engagement Score. From Setup, click **Installed package -> Predictive Lead Scoring by EverString -> View Components -> Rating Configuration -> Manage -> Edit**.

Custom Setting

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### Rating Configuration

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

[Edit](#) [Delete](#)

#### ▼ Default Organization Level Value

Location	EverString	ES Comp Fit Rating Cutoff 1	75
ES Comp Fit Rating Cutoff 2	50	ES Comp Fit Rating Cutoff 3	25
ES Person Engagement Rating Cutoff 1		ES Person Engagement Rating Cutoff 2	
ES Person Engagement Rating Cutoff 3		ES Person Fit Rating Cutoff 1	75
ES Person Fit Rating Cutoff 2	50	ES Person Fit Rating Cutoff 3	25

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