

# User Guide

## Marketo Integration Features

Zoom-Marketo integration can do the following tasks:

- Push registration information captured on a Marketo landing page to Zoom Webinar.
- Create Leads in Marketo from registrants and attendees of Zoom Webinars.

The setup will be broken into two sections:

1. The initial setup
2. Setup for each webinar
3. Testing and Verification

## Section 1: Initial Setup

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1. Login to your Marketo admin account, navigate to Admin>Users&Roles>Roles and create an API role.

Please refer to <https://docs.marketo.com/display/public/DOCS/Create+an+API+Only+User+Role>

2. Navigate to Admin>Users & Roles>Users and create an API Only User.

Please refer to <https://docs.marketo.com/display/public/DOCS/Create+an+API+Only+User>

3. Navigate to Admin>LaunchPoint and create a Custom Service.

Please refer to <https://docs.marketo.com/display/public/DOCS/Create+a+Custom+Service+for+Use+with+ReST+API>

Click View Details and copy your **Client Id** and **Client Secret** to a text file. We will need these later. The screenshot below shows the dialog box that contains your client ID and client secret.



4. Navigate to Admin>Web Service, find the “REST API” section, copy the **Endpoint** to a text file.



5. Log into Zoom [sign-in](#) and navigate to Integration -> [Marketo](#), paste your **Client Id**, **Client Secret**, and **Endpoint** from step 3 and then paste the Endpoint from step 4 into the “REST API Endpoint URL” field.

A screenshot of a 'Marketo Integration' form. The form has three input fields: 'Client Id', 'Client Secret', and 'REST API Endpoint URL'. Each field contains a blurred, masked value. At the bottom of the form are two buttons: a blue 'Save' button and a white 'Cancel' button with a grey border.

6. Click “Admin” -> “Marketo Custom Objects” -> Click “New Custom Object”. Please provide the following values to the fields:  
**Display Name:** ZoomWebinarOtherInfo  
**API Name:** ZoomWebinarOtherInfo\_C  
**Plural Name:** ZoomWebinarOtherInfos  
**Description:** Additional information from webinars including: Q&A, Polls, etc.  
**Check “show” for show on lead detail.** Tip: Single click on “hide” to change the value.

Create Object

Display Name:

★ ZoomWebinarInfo

API Name:

★ zoomWebinarInfo\_c

Plural Name:

★ ZoomWebinarInfos

Description:

Show in Lead Detail:

SHOW ☐

CANCEL

SAVE

- Click the “**Fields**” tab at the top of the page for this newly created Marketo Custom Object. Now click “New Field” and create the following fields with these values:

Display Name	API Name	Type
CreatedAt	createdAt	datetime
email	email	Link ( <b>dedupe</b> )
id	id	string ( <b>dedupe</b> )
MarketoGUID	marketoGUID	string
Poll	poll	text
Q&A	question	text
Updated At	updatedAt	datetime
Webinar ID	webinarID	string
Webinar Topic	webinarTopic	string

\*Please note that both email and id need to be **dedupe** fields.

New Field

Display Name:

\*

email

API Name:

\*

email

Description:

Data Type:

\*

link

Link Object:

\*

Lead

Link Field:

\*

Email Address

Dedupe Field:

YES

CANCEL

SAVE

Display Name	API Name	Type	State
Created At	createdAt	datetime	Published
email	email	link	Published
id	id	string	Published
Marketo GUID	marketoGUID	string	Published
Poll	poll	text	Published
Q&A	question	text	Published
Registration Questions	registrationQuestions	text	Published
Updated At	updatedAt	datetime	Published
Webinar ID	webinarID	string	Published
Webinar Topic	webinarTopic	string	Published

- Please go to Admin -> Webhook -> Create a new Webhook

Please fill out the fields with the following values:

**Webhook Name:** Zoom Webinar

**Description:** Webhook used for Zoom Webinar Registration

**URL:**

*[https://www.zoom.us/v1/webinar/register?id={{my.zoomWebinarId}}&first\\_name={{lead.First Name:default=xxx}}&last\\_name={{lead.Last Name:default=xxx}}&email={{lead.Email Address:default=xxx}}&api\\_key={{my.apiKey}}&api\\_secret={{my.apiSecret}}](https://www.zoom.us/v1/webinar/register?id={{my.zoomWebinarId}}&first_name={{lead.First Name:default=xxx}}&last_name={{lead.Last Name:default=xxx}}&email={{lead.Email Address:default=xxx}}&api_key={{my.apiKey}}&api_secret={{my.apiSecret}})*

**Request Type:** POST

**Template:** {blank} no value required here.

**Request Token Encoding:** None

**Response Type:** JSON

## New Webhook ✕

Webhook Name: \*

Zoom Webinar

Description:

Zoom Webinar

URL: \*

INSERT TOKEN

https://www.zoom.us/v1/webinar/register?id={{my.zoomWebinarId}}&first\_name=

Request Type: \*

POST

Template:

INSERT TOKEN

Request Token Encoding:

None

Response type:

JSON

CANCEL

CREATE

9. Response Mappings can be set up on this webhook if you would like to send emails from Marketo. Here is an example of some basic response mappings:

Response Mappings		EDIT
Response Attribute ↕	Marketo Field	
FirstName	FirstName	
join_url	joinUrl	
lastName	LastName	

## Section 2: Each Webinar

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1. Create the webinar on Zoom. This requires a webinar license on the Zoom side. Please go to [zoom.us/webinar/list](https://zoom.us/webinar/list) to schedule. Please ensure the webinar registration type is set to “Automatically Approve” or “Manual Approve”. Please also note the Webinar ID.

**Topic:**  
Zoom Marketo Test

**Description:**  
Testing.

**Time:**  
Aug 11, 2016 2:00 PM (GMT-5:00) Central Time (US and Canada) [Add to calendar](#)

**Webinar ID:**  
767-986-367

**Host Video:**  
On

**Panelists Video:**  
On

[Edit](#)

**Invite Attendees**

Webinar Size: 500 attendees

Approval: Automatically Approve

When someone registers: Send an email to host

Options: Close registration after event date  
Allow attendees to join from multiple devices  
Show social share buttons on registration page

Registration URL: <https://zoom.us/webinar/register/2848e26eef4be517c5b9141539e44ee6>

[Copy the Invitation](#) [Email me the Invitation](#)

[Edit](#)

**Manage Attendees**

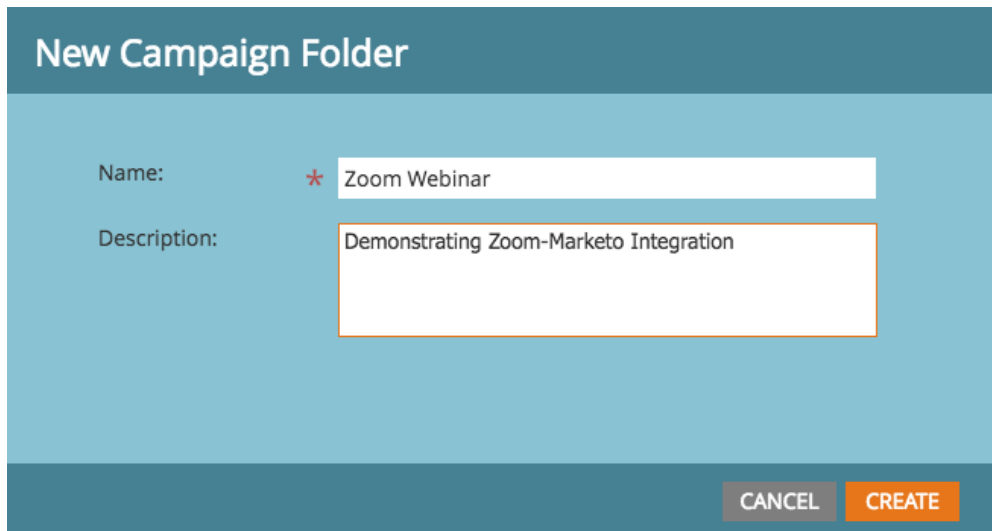
Registrants: 0

Automatically Approved

[View](#)

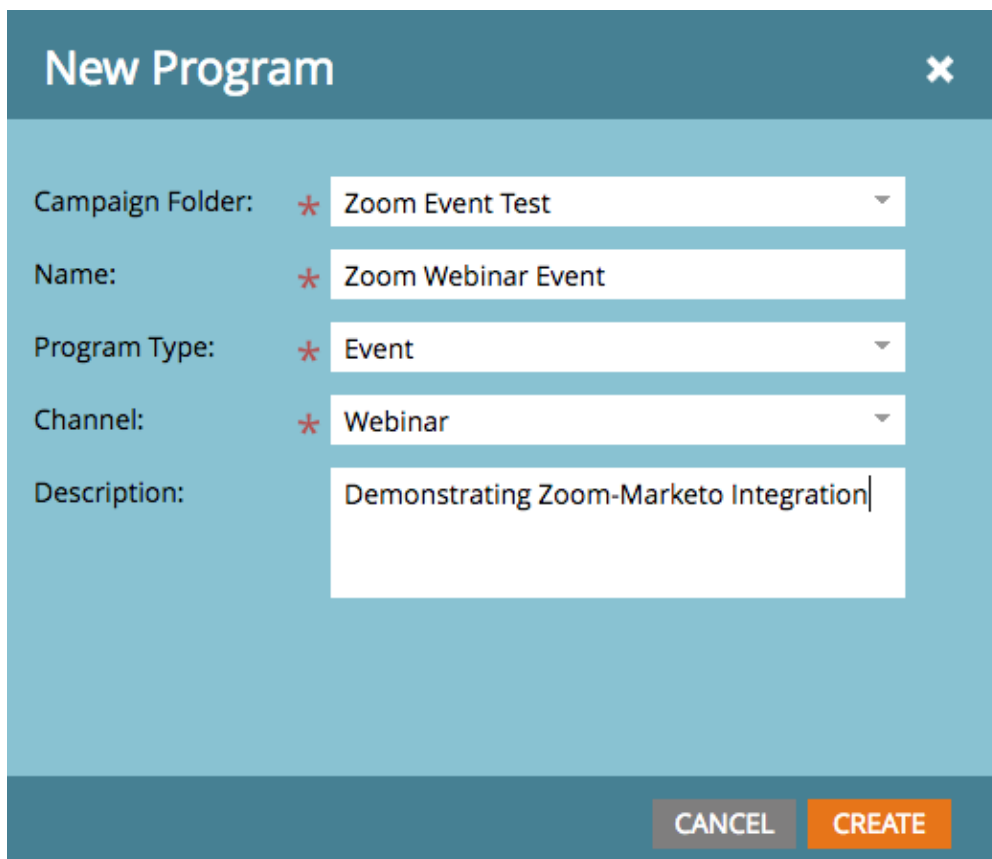
In this example the webinar ID is: 767986367

2. Log in to your Marketo Admin account. Navigate to Marketing Activities and create a new Smart Campaign folder and name it something similar to “Zoom Webinar”



The screenshot shows the 'New Campaign Folder' form. It has a dark blue header with the title 'New Campaign Folder'. Below the header, there are two input fields: 'Name:' with a red asterisk icon and a text box containing 'Zoom Webinar'; and 'Description:' with a text box containing 'Demonstrating Zoom-Marketo Integration'. At the bottom right, there are two buttons: 'CANCEL' (grey) and 'CREATE' (orange).

3. Click on this folder and create a new Program. Enter the fields from the following screenshot.



The screenshot shows the 'New Program' form. It has a dark blue header with the title 'New Program' and a close icon (X) on the right. Below the header, there are five input fields: 'Campaign Folder:' with a red asterisk icon and a dropdown menu showing 'Zoom Event Test'; 'Name:' with a red asterisk icon and a text box containing 'Zoom Webinar Event'; 'Program Type:' with a red asterisk icon and a dropdown menu showing 'Event'; 'Channel:' with a red asterisk icon and a dropdown menu showing 'Webinar'; and 'Description:' with a text box containing 'Demonstrating Zoom-Marketo Integration'. At the bottom right, there are two buttons: 'CANCEL' (grey) and 'CREATE' (orange).

Set the channel to be type “Webinar”

4. Click on your new program event named “Zoom Event Test” and click the “My Tokens” tab. Click and drag three text fields and give them the following values:

Zoom Webinar	Assets	Setup	My Tokens	Members
New	Program Actions	Edit Token	Delete Token	
These tokens can be referenced using this naming convention: {{my.My Token}}				
Ty...	Token Name	Value	Updated	
Local (3 Tokens)				
	{{my.apiKey}}	YourZoomAPIKeyHere	Aug 11, 2016 11:38 ...	
	{{my.apiSecret}}	YourZoomAPISecretHere	Aug 11, 2016 11:39 ...	
	{{my.zoomWebinarId}}	YourZoomWebinarIDHere	Aug 11, 2016 11:39 ...	

**\*Please note that YourZoomWebinarIDHere = 767986367 for this example.**

- Click "Assets" for this Program and begin creating the needed assets. Click "New" and "New Local Asset". Choose **Form**.

## New Form

Program:

Zoom Webinar

Name:

Zoom Webinar Form

Description:

Form for registration

☒ Open in editor

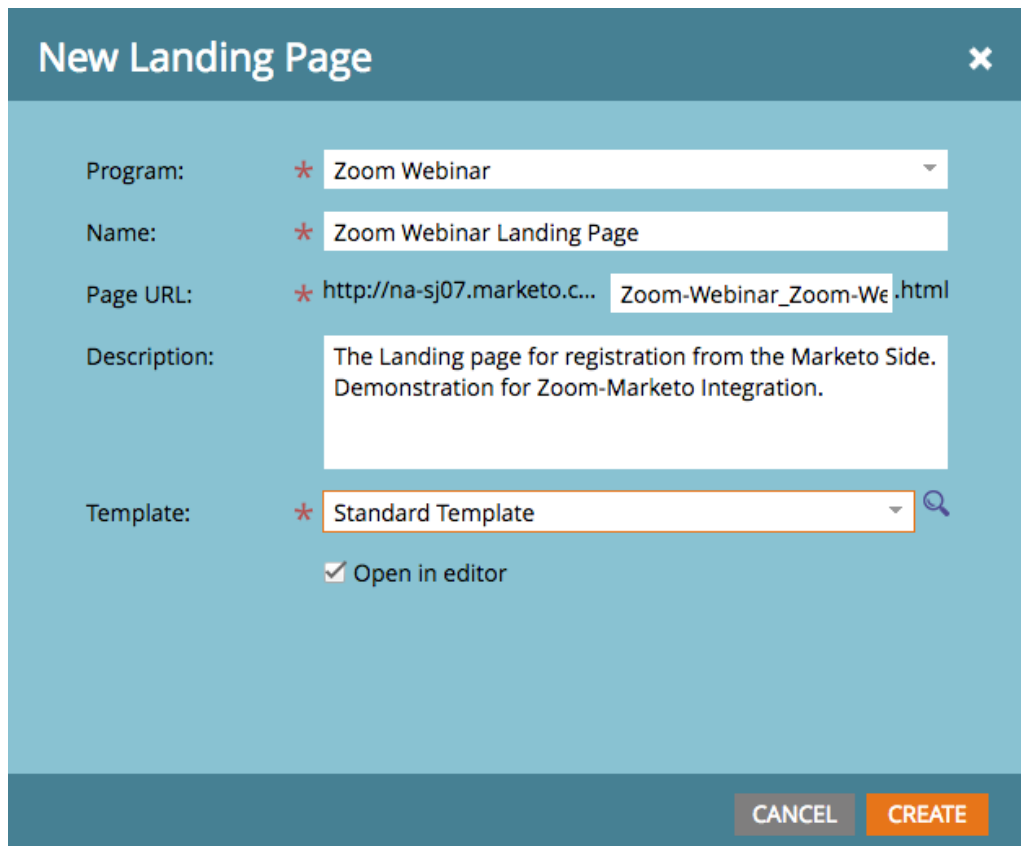
CANCEL

CREATE

Editing this form is highly subjective to your needs. At minimum, it requires **First Name**, **Last Name**, **Email address**. Please make each of these fields required. Finish the form and approve it.



6. Click on the Program Zoom Webinar again and create a new asset and choose “Landing Page”.



The screenshot shows a 'New Landing Page' form with the following fields and values:

- Program:** Zoom Webinar
- Name:** Zoom Webinar Landing Page
- Page URL:** http://na-sj07.marketo.c... Zoom-Webinar\_Zoom-We.html
- Description:** The Landing page for registration from the Marketo Side. Demonstration for Zoom-Marketo Integration.
- Template:** Standard Template
- ☒ Open in editor

At the bottom right, there are two buttons: CANCEL and CREATE.

Click “create” and then click “Edit Draft”. Click and drag the **Form** from the “Insert Elements” field on the right into the main landing page. Please see the following screenshot. You will need to select the form you just created from step 5. This example is “Zoom Webinar.Zoom Webinar Form”. The follow-up type is unique to your situation.

## Insert New Form

Form:

\*

Zoom Webinar.Zoom Webinar For

Follow-up Type:

☐ Landing Page

☐ External URL

☒ Form Defined

Follow-up Page:

\*

Select...

CANCEL

INSERT

Click "Landing Page Actions" -> Approve and Close to finish.

7. Click back on your Zoom Webinar Program and click "New" click "**New Smart Campaign**". Please create the following smart campaigns. Each of the following steps will contain the name, smart list, and flow for each Smart Campaign.

a. Registered from Zoom

## New Smart Campaign ×

Program: \*

Zoom Webinar Event

Name: \*

Registered from Zoom

Description: 

Smart Campaign to hold users who registered on the Zoom side.

CANCEL

CREATE

Registered From ZoomSmart ListFlowScheduleResults

New Campaign ActionsView Campaign MembersActive Campaigns

Use ALL filtersCollapse AllExpand All

Campaign is Requested

Add Constraint

Source: is Web Service API

Note: Enter a memorable and well-defined campaign description

Registered From ZoomSmart ListFlowScheduleResults

New Campaign ActionsView Campaign Members

Collapse AllExpand All

1 - Change Program Status

Add Choice

Program: Zoom Event Test ProgramNew Status: Webinar > Registered

b. Registered

from

Marketo

## New Smart Campaign ✕

Program: \*

Name: \*

Description: 

Smart Campaign to hold users who registered on the Marketo side and to push those registrations to Zoom

CANCEL CREATE

Registered From Marketo

Smart List

Flow

Schedule

Results

New Campaign Actions View Campaign Members

Use ALL filters Collapse All Expand All

Fills Out Form

Form Name:

Registered From Marketo

Smart List

Flow

Schedule

Results

New Campaign Actions View Campaign Members

Collapse All Expand All

1 - Call Webhook

Webhook:

2 - Change Program Status

Program:  New Status:

c. Attended:

## New Smart Campaign

Program:

★ Zoom Webinar Event

Name:

★ Attended

Description:

Smart Campaign to hold which users attended the Zoom webinar event.

CANCEL

CREATE

Attended

Smart List

Flow

Schedule

Results

New

Campaign Actions

View Campaign Members

Use ALL filters

Collapse All

Expand All

Campaign is Requested

Source: is

Web Service API

Add Constraint

Note: Enter a memorable and well-defined campaign description

Attended

Smart List

Flow

Schedule

Results

New

Campaign Actions

View Campaign Members

Collapse All

Expand All

1 - Change Program Status

Program: Zoom Event Test Program

New Status: Webinar > Attended

Add Choice

d. Absent

Attendees

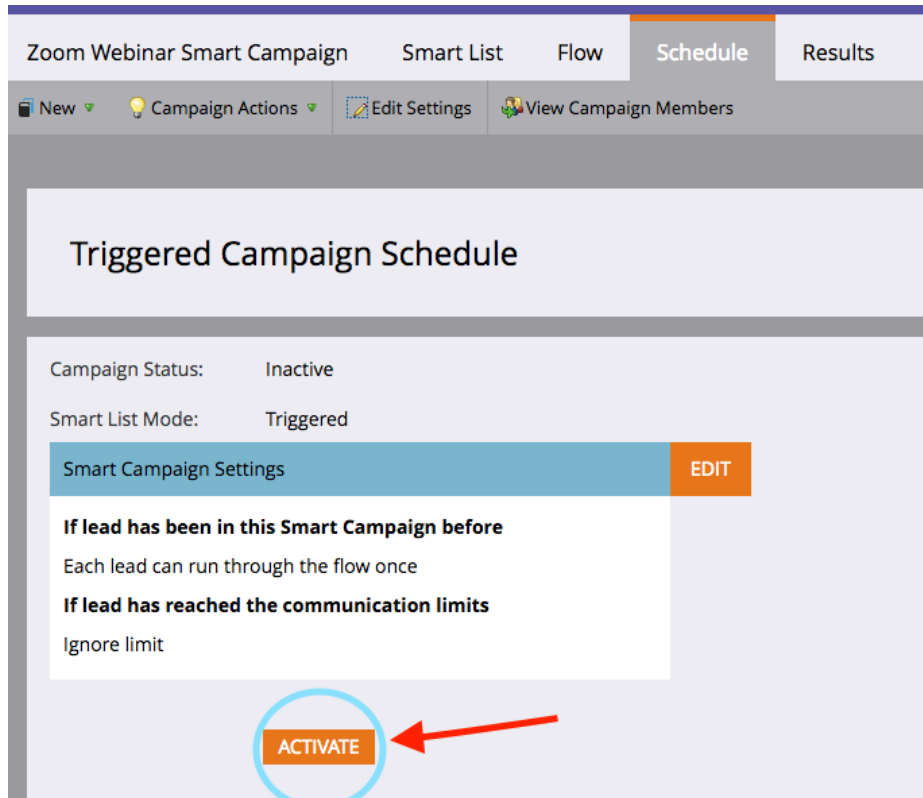
The image shows two screenshots from a software interface. The top screenshot is the 'New Smart Campaign' form. It has a title bar 'New Smart Campaign' with a close button. The form contains three fields: 'Program' with a dropdown menu showing 'Zoom Webinar Event', 'Name' with a text input 'Absent Attendees', and 'Description' with a text area containing 'Smart Campaign to hold users who didn't attend the Zoom Webinar'. At the bottom right are 'CANCEL' and 'CREATE' buttons.

The bottom screenshot shows the 'Flow' tab of the 'Absent Attendees' smart campaign. It has a tab bar with 'Absent Attendees', 'Smart List', 'Flow', 'Schedule', and 'Results'. Below the tabs are buttons for 'New', 'Campaign Actions', and 'View Campaign Members'. There are also buttons for 'Use ALL filters', 'Collapse All', and 'Expand All'. The main area shows two filters: '1 - Member of Program' and '2 - Not Program Status was Changed'. The '1 - Member of Program' filter has a dropdown for 'Member of Program' set to 'true' and a dropdown for 'Program' set to 'Zoom Event Test Program'. The '2 - Not Program Status was Changed' filter has four conditions: 'Program' is 'Zoom Event Test Program', 'New Status' is 'Webinar > Attended', 'Old Status' is 'Webinar > Registered', and 'Date of Activity' is 'between' '08/12/2016' and '08/13/2016'. There are 'Add Constraint' buttons for each filter.

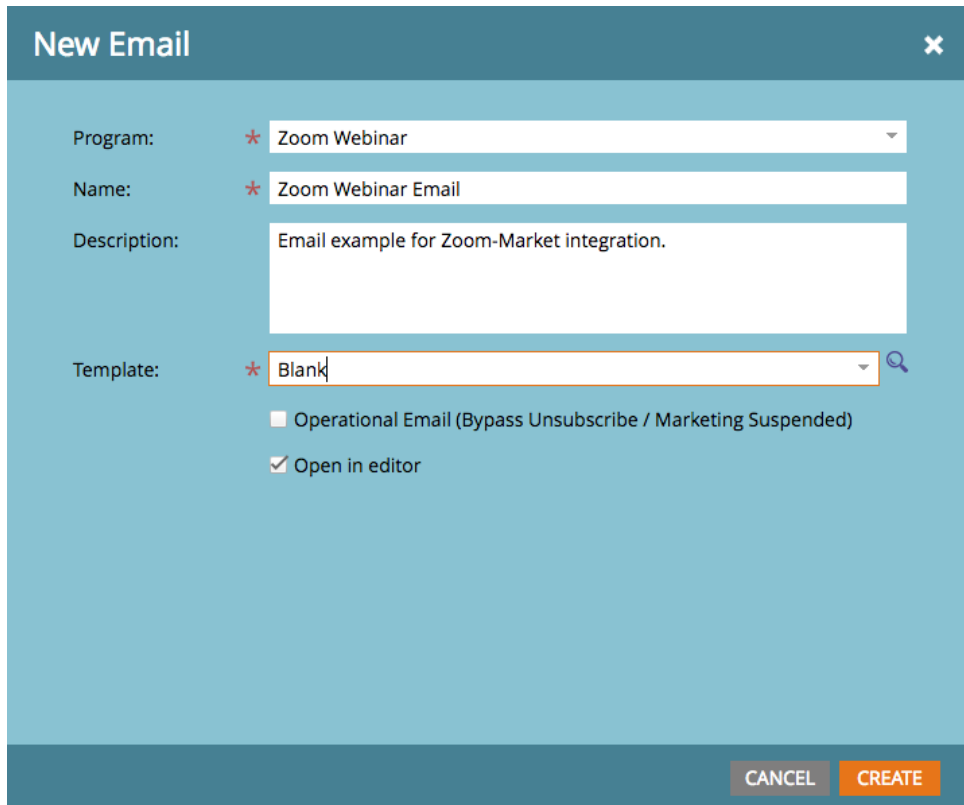
For step d. “Absent attendees” smart campaign you will need to use the filters of “Member of Program” and “Not Program Status was Changed”. On the two filters please use the fields from the screenshot above to fill the correct fields. For the “Not Program Status was Changed” filter you will need to add the following constraints: New Status, Old Status, and

make sure that “Date of Activity” is added. **\*Note: For date of Activity please set this date to your webinar end date that matches the end date from your scheduled Zoom webinar.**

8. Click the “Schedule” tab at the top and then click “Activate”. This activates the smart campaign. Repeat this step for each smart campaign that was created in step 7.



9. Click back to the “Zoom Webinar” program and click New -> Local Asset and choose “Email” for the type.



The screenshot shows a 'New Email' form with a dark blue header bar containing the title 'New Email' and a close icon. The form has a light blue background. It includes the following fields and options:

- Program:** A dropdown menu with a red asterisk icon, currently set to 'Zoom Webinar'.
- Name:** A text input field with a red asterisk icon, containing 'Zoom Webinar Email'.
- Description:** A text area containing 'Email example for Zoom-Market integration.'
- Template:** A dropdown menu with a red asterisk icon, currently set to 'Blank'. A magnifying glass icon is visible to the right of the dropdown.
- Operational Email (Bypass Unsubscribe / Marketing Suspended):** An unchecked checkbox.
- Open in editor:** A checked checkbox.

At the bottom right of the form, there are two buttons: 'CANCEL' and 'CREATE'.

\*Please note this step is highly customizable. This example will show a basic setup. Click “Edit draft” enter a subject and customize this how you would like. Once finished click “email actions” and approve.

10. Steps 1-9 can be completed and then cloned for any new webinar. The only value that needs to be changed is the “zoomWebinarId” token in section 2 step 4 and the date of activity in the Smart List of the “Absent Attendees” Smart List in step 7d. This would need to be changed for your new webinar.
11. Please navigate to the [Zoom Webinar management](#) and click on the webinar created in section 2 step 1. Scroll to the bottom and click “edit” for “**Generate Leads in Marketo**”. Depending on the specific setup you will want to check either option for “**Send registration information to a Smart Campaign**” and or “**Send attendee information to a Smart Campaign**”. After making the selections use the drop-down boxes to select the Smart Campaign that was created in **section 2 step 7a** and **section 2 step 7c**.



## Edit Marketo Integration Setting ✕

☒ Send registration information to a Smart Campaign ?

Zoom Webinar -> Registered From Zoom

☒ Send attendee information to a Smart Campaign ?

Zoom Webinar -> Attended

Gather other information to Marketo (optional) ?

ZoomWebinarOtherInfo

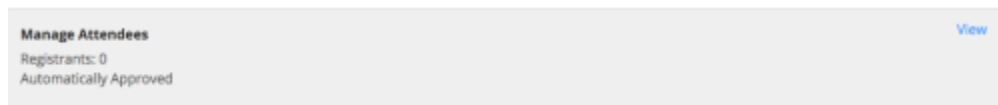
<input checked="" type="checkbox"/> Zoom Webinar Fields	Marketo Custom Object Fields
<input checked="" type="checkbox"/> Webinar ID	Webinar ID
<input checked="" type="checkbox"/> Webinar Topic	Webinar Topic
<input checked="" type="checkbox"/> Registration Questions	Registration Questions
<input checked="" type="checkbox"/> Q&A	Q&A
<input checked="" type="checkbox"/> Poll	Poll

Save
Cancel

### Section 3. Testing and Verification

1. To test pushing registration from the Zoom webinar registration page to Market you will need to provide your webinar registration page from Zoom to a user and have them register. To check if the registration went through follow these steps:
  - a) Have a user register at <https://zoom.us/webinar/registration/xxxxxxx> Note: This URL is taken from <https://zoom.us/webinar/YourWebinarID>
  - b) Log into your Marketo Admin account and click on the program created in section 2 step 3.
  - c) Click the "Members" tab you will see the person who recently registered.
  - d) Click the Smart Campaign created in section 2 step 7a.

- e) Click the **“Results”** tab. This will show you the Webhook calls. If there are any errors, they will show here after you click on the specific call number. If there are any errors, please check the Admin -> Webhook URL token to make sure it matches the Tokens on the Smart Campaign.
2. To test pushing from the Marketo Landing Page to Zoom please click on your landing page that you created in section 2 step 6.
- a) Navigate to this landing page in your browser and fill out the First Name, Last Name, and Email Address fields.
  - b) Navigate to your Zoom Webinar at <https://zoom.us/webinar/YourWebinarIDHere> and click **“View”** to see the user that just registered on the Marketo side.



3. To test the Attendee push from Zoom to Marketo you will need to host the webinar and have participants type in the Q&A and/or enter any custom registration questions you might have set up. This information will push **30 minutes** after the webinar has ended. To view the attendee information, follow these steps:
- a) Log into your Marketo admin account and navigate to the Smart Campaign created in section 2 step 7c.
  - b) Click **“View Campaign Members”** click on the specific lead number and click the **“Custom Objects”** tab at the top. Select **“ZoomWebinarOtherInfo”** from the drop-down box.