User Guide

<u>Marketo Integration Features</u>

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

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.

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

7. 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 (**dedupe**)
id	id	string (**dedupe**)
Marketo GUID	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

8. 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}}*

   Request Type: POST

Template: {blank} no value required here.
Request Token Encoding: None
Response Type: JSON

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:

Section 2: Each Webinar

1. Create the webinar on Zoom. This requires a webinar license on the Zoom side. Please go to 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.
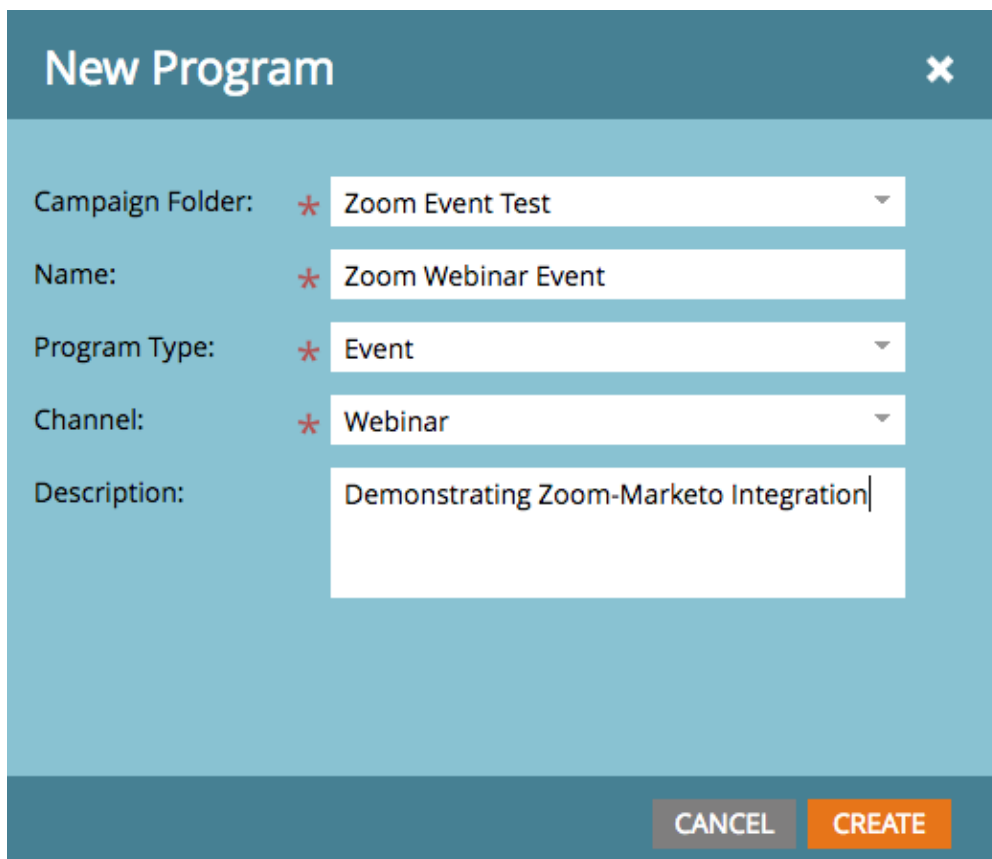

In this example the webinar ID is: 767986367

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"

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

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:

*Please note that YourZoomWebinarIDHere = 767986367 for this example.

5. Click "Assets" for this Program and begin creating the needed assets. Click "New" and "New Local Asset". Choose **Form**.
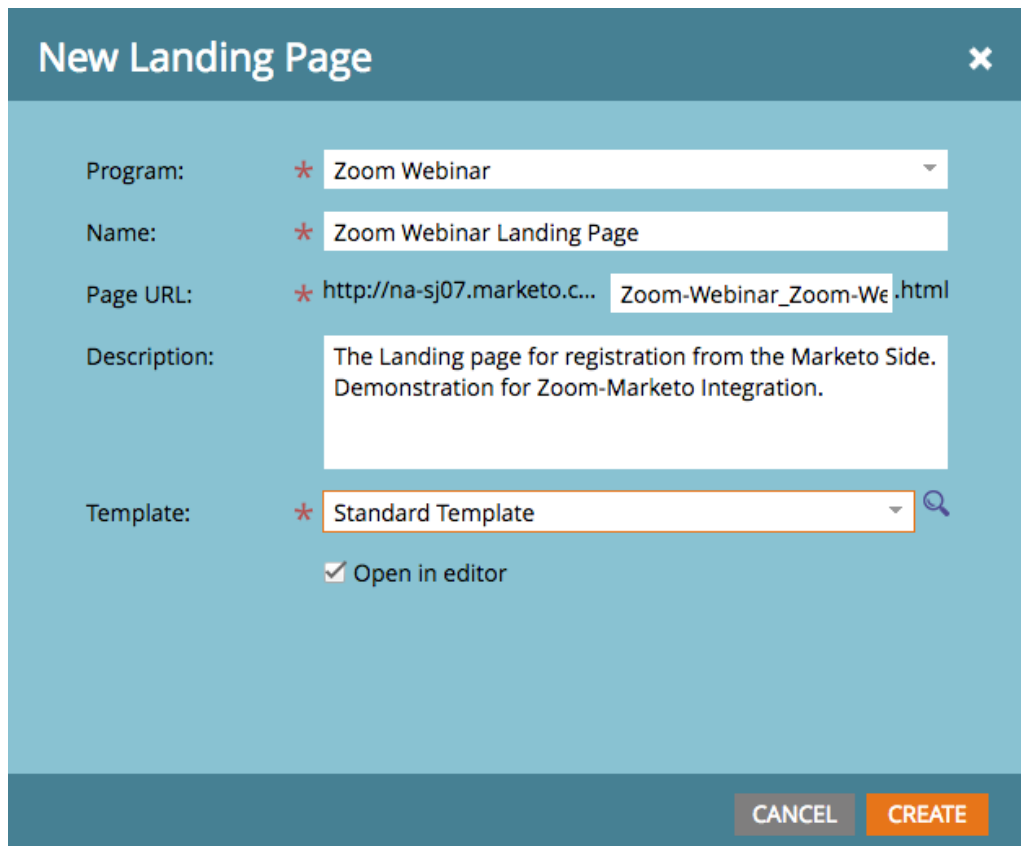
Editing this form is highly subjective to your needs. At minimum, it requires **First Name, Last Name, Email address.** Please make each of these fields required. Finish the form and approve it.

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

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.

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 Zoom | Smart List | Flow | Schedule | Results |

🗐 New ▾   💡 Campaign Actions ▾   ✥ View Campaign Members   🗋   ⚠ Active Campaign

▷ Use **ALL** filters ▾ | △ Collapse All   ▽ Expand All

✏ Campaign is Requested   � ✖

▷ Add Constraint ▾

Source: is   Web Service API

Note: Enter a memorable and well-defined campaign description

| Registered From Zoom | Smart List | Flow | Schedule | Results |

🗐 New ▾   💡 Campaign Actions ▾   ✥ View Campaign Members   🗋   ⚠

△ Collapse All   ▽ Expand All

✏ 1 - Change Program Status   🔵 ✖

⬛ Add Choice

Program: Zoom Event Test Program   New Status: Webinar > Registered

b.   Registered   from   Marketo

New Smart Campaign

Program: * Zoom Webinar Event

Name: * Registered from Marketo

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

Add Constraint ▾

Form Name: is   ▾   Zoom Event Test Program.Event Test Form ⊕ ▾

Registered From Marketo | Smart List | Flow | Schedule | Results

New ▾   Campaign Actions ▾   View Campaign Members

Collapse All   Expand All

1 - Call Webhook

Add Choice

Webhook: Jake Webinar Test   ▾

2 - Change Program Status

Add Choice

Program: Zoom Event Test Program   ▾   New Status: Webinar > Registered   ▾

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

Add Constraint ▾

Source: is   Web Service API

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

Add Choice

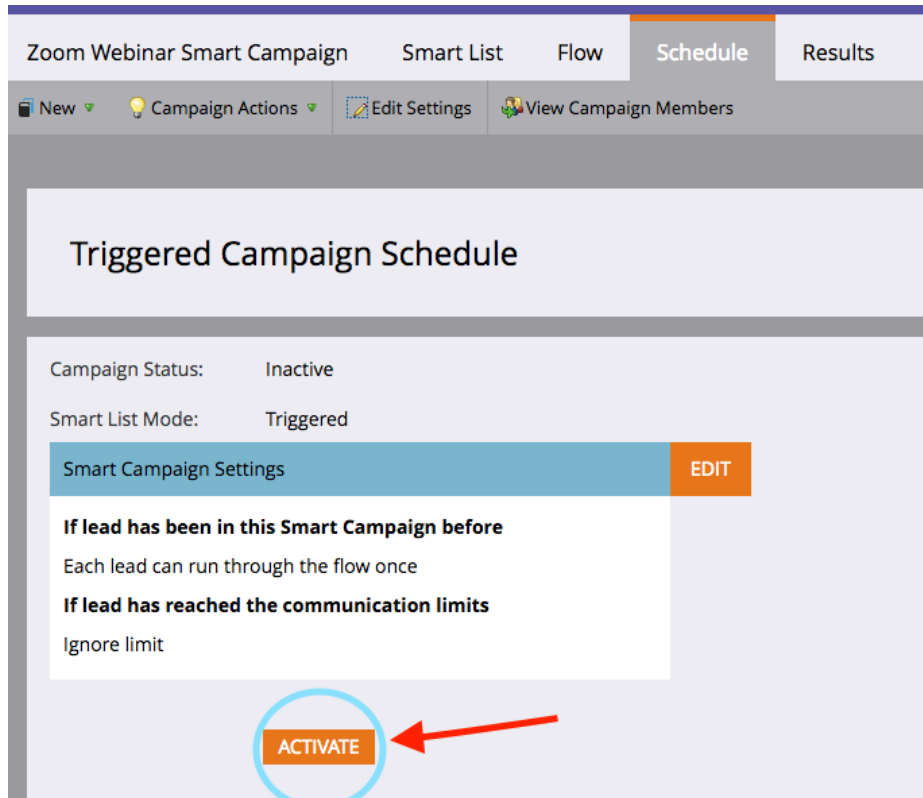Program: Zoom Event Test Program   New Status: Webinar > Attended

New Smart Campaign ✕

Program: * Zoom Webinar Event ▾

Name: * Absent Attendees

Description: Smart Campaign to hold users who didn't attend the Zoom Webinar

CANCEL   CREATE

Absent Attendees   Smart List   Flow   Schedule   Results

🗑 New ▾   💡 Campaign Actions ▾   👥 View Campaign Members

⚑ Use ALL filters ▾ | △ Collapse All   ▽ Expand All

⚑ 1 - Member of Program   🔧 ✕

⚑ Add Constraint ▾

Member of Program: true ▾

Program: is ▾   Zoom Event Test Program   ➕ ▾

⚑ 2 - Not Program Status was Changed   🔧 ✕

⚑ Add Constraint ▾

Program: is ▾   Zoom Event Test Program   ➕ ▾

New Status: is not ▾   Webinar > Attended   ➕ ▾ ⬚

Old Status: is ▾   Webinar > Registered   ➕ ▾ ⬚

Date of Activity: between ▾   08/12/2016   ▦ ⬚

08/13/2016   ▦

Absent Attendees   Smart List   Flow   Schedule   Results

🗑 New ▾   💡 Campaign Actions ▾   👥 View Campaign Members

△ Collapse All   ▽ Expand All

✏ 1 - Change Program Status   🔧 ✕

Add Choice

Program: Zoom Event Test Program ▾   New Status: Webinar > No Show ▾
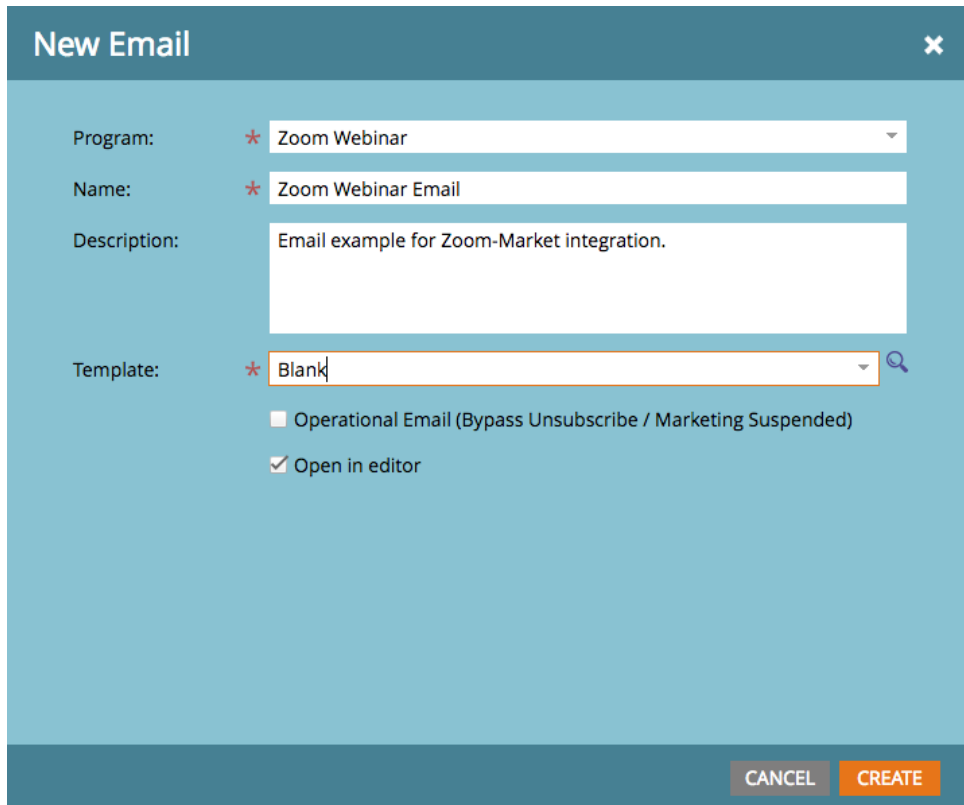

For step d. "Absent attendees" smart campaign you will need to use the filters of "Member of Program" and "Not Program Status was Changed". On the two filters please use the fields from the screenshot above to fill the correct fields. For the "Not Program Status was Changed" filter you will need to add 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.

*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**.

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.
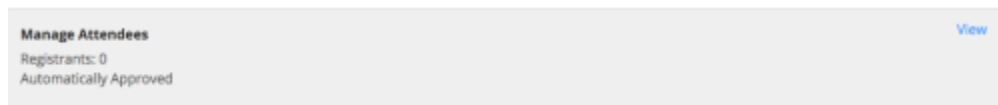
3. To test the Attendee push from Zoom to Marketo you will need to host the webinar and have participants type in the Q&A and/or enter any custom registration questions you might ave set up. This information will push **30 minutes** after the webinar has ended. To view the attendee information, follow 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.