

Marketo Integration

Integration Overview

The Webcast Marketo Integration offers the capability to pass webcast data into Marketo as well as take registration for a webcast on a Marketo form.

The [Webcast Activity Feed](#) is an integration managed by the webcast team that allows you to create / update leads, create custom activity records and capture interaction data in custom objects

The [Registration Integration](#) allows you to take registration on a Marketo form to leverage the Marketo intelligence and support your overall marketing campaign steps, while seamlessly registering the user for the webcast.

Webcast Activity Feed

Activity Feed Overview

The Webcasts Activity Feed sends webcast registration, attendance and interaction data into Marketo. This document outlines the specific data that passes with the integration, as well as setup steps required to complete the integration. The Marketo activity feed is facilitated by [Workato](#).

The webcast activity feed is setup and managed by the webcast team, please use the [form](#) to request the required support.

Included Data and Endpoints

Clients are able to customize which data and endpoints listed below are included with their implementation. This will be confirmed during the meeting with a webcast integration specialist.

- Create new Marketo Leads
 - Standard Webcast Registration Details
 - Custom Webcast Registration Details

- Update Existing Leads
 - Standard Webcast Registration Details
 - Custom Webcast Registration Details
- Webcast Interaction Data (Marketo Custom Objects)
 - Standard Webcast Registration Details
 - Custom Webcast Registration Details
 - Webcast Viewing Session Times and Durations
 - Webcast Polling / Survey Responses
 - Webcast Q&A Data
 - Webcast CE Details
- Webcast Attended Data (Marketo Custom Activity)
 - New Webcast Viewer Session

Requirements

- API enabled Marketo Account
- Custom Data Objects to store webcast interaction data
- Custom Activity to store new webcast viewer session

Custom Objects

Object Name: Webcast Registration Viewer Data

| Field Name | Required | Description | Field Type |
|------------------|----------|---|---|
| External ID | Yes | Stores unique values which connect the data between the webcast and Marketo | string(Dedupe YES) |
| Lead ID | Yes | Connects the custom object record to the corresponding lead | link(Link Object: Lead, Link Field: Id, Dedupe: NO) |
| Address1 | No | Street Address 1 | string |
| Address2 | No | Street Address 2 | string |
| Attended | No | Did the webcast registrant view, at least a portion, the webcast | boolean |
| Campaign Source | No | Track the marketing channel that drove webcast registration | string |
| Certificate Link | No | Link to download the user's certificate, if applicable | string |

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|-------------------------------------|----|--|--------|
| Certification Results | No | Did the user pass the requirements to receive CE credit | string |
| City | No | City | string |
| Company | No | Company | string |
| Cost Center | No | Text field in the webcast setup, generally utilized to capture sponsor or billing code information | string |
| Country | No | Country | string |
| Custom Registration | No | Non-default webcast registration field. The actual field name implemented should not be "Custom Registration" but reflect the information captured | string |
| Email | No | Email | email |
| Fax Number | No | Fax Number | string |
| First Name | No | First Name | string |

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|-----------------------|----|---|---------|
| Hidden Field | No | A registration field that is hidden on the webcast registration form. Similar to the "Custom Registration" field a different field name can be chosen for this field. | string |
| IP Address | No | IP Address | string |
| Last Name | No | Last Name | string |
| Live Session Duration | No | The amount of time the user viewed the webcast live | integer |
| Mobile Number | No | Mobile number | string |
| OD Session Duration | No | The amount of time the user viewed the webcast in their most recent on-demand session | integer |
| Phone Number | No | Phone Number | string |
| Postal Code | No | Postal or ZIP Code | string |

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|-------------------|----|---|----------|
| Referrer | No | The address of the website the user accessed the webcast URL from, if included in the browser header. | string |
| Registration Date | No | Date of user registration for the webcast | datetime |
| Sim Live Duration | No | The amount of time the user viewed the webcast in their most recent simulated-live session | integer |
| State | No | State or Province | string |
| Title | No | Job Title | string |
| Unsubscribed | No | Unsubscribe to email communications for this specific webcast event ID. checked(unsubscribed from communications), unchecked(did not unsubscribe from communications) | boolean |

| | | | |
|---------------------|----|--|--------|
| User Agent | No | A characteristic string that lets servers and network peers identify the application, operating system, vendor, and/or version of the requesting user agent. | string |
| Webcast Event ID | No | Unique id of the corresponding webcast event | string |
| Webcast Event Title | No | Title of the corresponding webcast event | string |

Object Name: Webcast Survey QA Data

| Field Name | Required | Description | Field Type |
|-------------|----------|---|---|
| External ID | Yes | Stores unique values which connect the data between the webcast and Marketo | string(Dedupe YES) |
| Lead ID | Yes | Connects the custom object record to the corresponding lead | link(Link Object: Lead, Link Field: Id, Dedupe: NO) |

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|-----------------|----|--|--------|
| Answer | No | Depending on "Record Type" it is either a viewer's response to a poll/survey or an admin's response to a viewer question | string |
| Campaign Source | No | Track the marketing channel that drove webcast registration | string |
| Email | No | Email | email |
| Question | No | Depending on "Record Type" it is either a viewer question or the question for a poll/survey | string |
| Record Type | No | QA: Is a viewer question In-Event: Is a survey/poll sent during the webcast Post-Event: Is a survey responded to after the conclusion of the webcast | string |

| | | | |
|---------------------|----|--|--------|
| Webcast Event ID | No | Unique id of the corresponding webcast event | string |
| Webcast Event Title | No | Title of the corresponding webcast event | string |

NOTE: Custom Objects can be setup on the Admin > Database Management > Marketo Custom Objects page. You may need to enlist the assistance of your company's Marketo administrator to complete the below steps.

If you need additional information on creating Custom Objects in Marketo, please contact Marketo Support.

When initially creating the custom objects enable the objects to show in the lead detail.
Be sure to approve the custom objects once they are created

Custom Activity

Activity Name: Webcast Viewing Session

| Field Name | Required | Description | Field Type |
|---------------------|------------|--|--|
| leadId | Yes | Id of the lead associated to the activity | integer(included by default) |
| Webcast View | Yes | Type of webcast view session, ie. Live, On-Demand, Simulated Live | string(Primary Attribute Value) |

| | | | |
|-------------------------|------------|---|---------------|
| Webcast Event ID | Yes | The webcast event id that was viewed | string |
|-------------------------|------------|---|---------------|

Implementation Process

To facilitate the integration implementation you will need to schedule a meeting with an integration specialist to review the specific requirements for your integration, which were outlined in the completed [form](#). The integration process is handled almost entirely by the webcast team, there are a couple steps you will need to complete:

1. Create the two custom objects and/or the custom activity in Marketo to store webcast activity data
2. Connect Workato to Marketo. It is recommended that the initial integration setup be completed using a sandbox environment, if available. The connection to Workato will be completed during your implementation call, but you can review the process by watching the [Workato Connection Setup Tutorial](#).

Registration Integration

Introduction

Seamlessly register users for a webcast events using a Marketo form. The process does not require the audience member to load any pages from the webcast within their browser to register. This integration leverages Marketo webhooks, allowing for setup and testing at your convenience.

Before you get started

- A “pass” parameter is required for Webhooks. If you do not already know your “pass” parameter value please contact [Support](#) for assistance.
- The webcast uses "email" as the primary field and is required for all registrations. Duplicate values will result in a "User already registered" response message.

- User registration data is immutable and will not be updated by resending registration data with a duplicate email address. It is important to include all desired registration data on the initial webhook submission
- All parameters are case-sensitive
- The webcast will only capture data for registration fields enabled on the webcast form
- Parameter values should be properly URL encoded (Ex. Blank spaces should be replaced with %20)
- Fields containing html or other script tags will be blocked by the system's security filter
- To trigger a registration confirmation email from the webcast include the "tp_regconfemail" parameter and set it equal to "1". If this parameter is not included or is included but not equal to 1 the webcast will not send a confirmation email. Additionally, the webcast confirmation email must be enabled in order to be sent.
- Security options enabled for the webcast will not stop registrations. These settings are only tested when the audience member attempts to enter the actual presentation.

Create a lead field to store the webcast event ID

In order to populate the Webcast Event ID in the Webhook a custom field needs to be setup.

1. After logging in to your Marketo account, in the top right of your screen, click "Admin".

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2. Along the left of your screen under "Database Management", click "Field Management".

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3. At the top of the screen, click "New Custom Field".

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4. In the custom field setup, select ""Integer" as the "Type. Add a "Name" that you can easily identify later. "webcast ID" is used for this example.

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Creating a Webhook in Marketo

A webhook is used to send a user's registration data to a webcast when they register with a Marketo form. A Marketo webhook only needs to be created a single time and can be leveraged across all webcasts.

Data captured in the Marketo form will only be sent to the Webcast if that field is enabled on the webcast registration form.

1. After logging in to your Marketo account, in the top right of your screen, click "Admin".

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2. Along the left of your screen under "Integration", click "Webhooks".

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3. At the top of your screen under "Webhooks", click "New Webhook".

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4. Fill out the required fields to create a new Webhook. In the Webhook Name field, title the Webhook you are creating. In the URL field, enter the desired Webhook URL and then insert the corresponding Marketo tokens. Refer to the detailed instructions below on customizing the Marketo Webhook URL and selecting the proper Webhook settings.

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Request Type

Post

Webhook URL Configuration

Below is an example of a default Webhook URL, without the Marketo tokens. The URL you use should include any parameters (registration fields) you would like captured in the Webcast's reports. It is recommended to be inclusive of any potential fields you may wish to pass. The Webhook call is unaffected if additional fields, not enabled on the webcast, are passed, as long as they are not required fields. Refer to the notes and table below for instructions on customizing the link for your event.

Example URL

`https://event.webcasts.com/viewer/regserver.jsp?ei=1234567&fname=FirstName&lname=LastName&company=CompanyName&title=BusinessTitle&address1=StreetAddress&address2=StreetAddress2&city=City&state=State&country=Country&postalcode=PostalCode&phone=PhoneNumber&cell=CellNumber&fax=FaxNumber&email=Email@Address.com&custom_question1=CustomQuestionAnswer1&pass=abcd001&tp_regconfemail=1`

Once the Server Side Registration URL has been entered into the URL field, click "Insert Token" next to the URL field and replace each default value from the Server Side Registration URL with the appropriate Token from Marketo.

Replace "FirstName" from the Server Side Registration URL with "{lead.FirstName:default=edit me}" Token from Marketo.

Request Token Encoding

Form/URL

Webcast Parameters

| Parameter | Required | Description | Values | Character Limit |
|-----------|----------|----------------------------|------------------------|-----------------|
| ei* | Yes | Event ID (Ex. 1234567) | Number | 7 |
| email* | Yes | Email Address | Ascii email | 128 |
| pass* | Yes | Client ID (Ex. abcd001) | Alphanumeric, utf-8 | 7 |

| | | | | |
|--------------|--------------------------------------|---|---------------------|-----|
| unsubscribe* | Yes, if enabled on the webcast form. | Unsubscribe to email communications for this specific webcast event ID. 1 = yes(unsubscribe from communications), 0 = no(do not unsubscribe from communications) | 0, 1 | 1 |
| fname | No | First Name | Alphanumeric, utf-8 | 250 |
| lname | No | Last Name | Alphanumeric, utf-8 | 250 |
| company | No | Company Name | Alphanumeric, utf-8 | 250 |
| title | No | Business Title | Alphanumeric, utf-8 | 250 |
| address1 | No | Street Address | Alphanumeric, utf-8 | 250 |

| | | | | |
|------------|----|---|---------------------|-----|
| address2 | No | Street Address - Extra | Alphanumeric, utf-8 | 250 |
| city | No | City | Alphanumeric, utf-8 | 250 |
| state | No | State | Alphanumeric, utf-8 | 250 |
| country | No | Country | Alphanumeric, utf-8 | 250 |
| postalcode | No | Postal/Zip Code | Alphanumeric, utf-8 | 20 |
| phone | No | Primary Phone Number | Alphanumeric, utf-8 | 20 |
| cell | No | Cell/Mobile Number | Alphanumeric, utf-8 | 20 |
| fax | No | Fax Number | Alphanumeric, utf-8 | 20 |
| tp_hidden | No | A hidden field not shown on the registration form that does not need to be enabled. | Alphanumeric, utf-8 | 250 |

| | | | | |
|-----------------|----|---|---------------------|-----|
| sti | No | Campaign Source Tracking -designed to track the registration source | Alphanumeric, utf-8 | 250 |
| tp_regconfemail | No | Enable a Registration Confirmation Email from the Webcast | 1 | 1 |
| customQuestion | No | Non-default webcast registration field | Alphanumeric, utf-8 | 250 |

Custom Registration Questions

Any non-default webcast registration field is known as a custom registration question. All default registration questions are listed above. Please familiarize yourself with the below to ensure data for your custom webcast registration questions are captured.

- The parameter names should match the corresponding “Report Column Title” in the webcast setup
- Parameter names are case and space sensitive
- Parameter names have a 75 character limit

- For custom webcast registration questions setup as “Checkboxes” with multiple answers, repeat the parameter name for each answer submitted. The answers will appear grouped together in the reports.

Eg.

“...&customQuestion=answer1&customQuestion=answer2&customQuestion=answer3..
.”

- For custom webcast registration questions setup as a “Single Checkbox”, include "checked" as the answer if the checkbox was selected. Leave the answer blank if the checkbox was not selected.
- For custom webcast registration questions setup as: “Checkboxes”, “Radio Buttons”, or “Drop Down List”, the value(s) sent must match the webcast “Answers” values exactly to be captured. For this reason if the webcast registration form will not be used it is recommended that all custom registration questions be set to “Open Text Field” or “Open Text Area” type.
- Character limit is 250

Return Messages

| Message | Description |
|--------------------|--|
| "Success." | The registration has been successfully submitted to the event. |
| "Event not found." | Invalid Event ID |
| "Unauthorized." | The client pass ID does not have access to the Event ID. |

| | |
|--|---|
| "Registration for this event is prohibited." | The event is configured for anonymous registration. |
| "Email not found." | A valid email address is required for registration. This message indicates an email was not passed. |
| "Email format not valid." | Invalid email formatting |
| "User already registered." | An audience member is already registered for the event ID based on email address. |
| "No reg data sent." | General error - Contact Support for help. |

Marketo Campaign Setup

Once the Webhook is setup in Marketo, a Campaign needs to be created, which is used to activate the Webhook when a user registers on a Marketo Landing Page. These instructions allow a single registration form to be used for multiple events.

1. At the top left of your screen, click on the Marketo logo and select "Marketing Activities".

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2. In the center of your screen in the "Smart Campaigns" section, click "New Smart Campaign".

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3. In the new window, select a Campaign Folder using the dropdown and add a name using the Campaign Name field. Click "Create" once complete.

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4. Once the campaign is created, click "Smart List" to select when this campaign will take affect.

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5. Along the right side of your screen under "Triggers", select the "Fills Out Form" field and drag it into the box in the center of your screen.

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6. Select the Form that will be used to capture registration. This means the Campaign is triggered anytime someone completes the selected Form.

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7. Next, click "Flow" to select what actions will be taken.

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8. Along the right side of your screen under "Marketing", select "Change Data Value" and drag it into the box in the center of your screen. Set the "Attribute" to the custom field you just created (Ex. "webcastID" in this example). Set the "New Value" to the Event ID for your presentation.

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9. Along the right side of your screen under "Integration", select the "Call Webhook" field and drag it into the box in the center of your screen. Select the Webhook you previously created using the dropdown. This will trigger the Webhook you created anytime someone completes the Form selected on the previous step.

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11. Next, click "Schedule" to active the Campaign.

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12. Click "Activate" to make the Campaign active. Once activated, the campaign will appear in the selected folder with a light bulb indicator.

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Test the Setup

Once the setup is complete, any submissions of the Marketo form should appear in the Webcast reports nearly immediately. To test the setup, submit a sample registration through the Marketo form.

1. In the Webcast platform, select the Webcast where data should be passing and choose the "Reports" button below.

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2. In the Reports interface, choose the "Audience Details" report (default) and click "Run My Report". The report that displays will include any registration fields passed in the setup, but will have blank fields for any data that was not passed or is related to audience participation.

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3. If all the data appears correct in the reports, no further action is needed. If some or all of the data is not received, review the Server Side Registration URL used in setup and confirm all fields have been correctly mapped.

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