



Marketo INXPO Adapter

User Guide

Version 1.0



Integration Overview

With the Marketo INXPO Adapter, you can seamlessly-connect the two systems together. As the administrator, you choose what content flows between the two platforms and what does not. Equally important, you choose when that content first gets pushed as well as scheduling the frequency, fully automating the updating process.

On an event-by-event basis, depending on your preferences, each INXPO attendee can have their profile, registration details and/or activity pushed to Marketo.

- Standard profile fields
- Custom fields
- Registration fields
- Event-Survey responses
- Event login information
- Presentation viewing information
- Document viewing information

Schedule the content integration as required. It can be configured for a one-time push, a set of specific pushes, or on a daily, weekly or monthly basis. A combination of the methods can also be configured. For example:

- Have a one-time live webcast? Perhaps schedule the integration right after the live webcast and then weekly during the subsequent OnDemand period.
- Have a three-day user conference with worldwide attendance? Perhaps set a schedule of frequent pushes throughout those 72 hours providing marketing activity while the conference is running.
- Have an ongoing community? Perhaps a scheduled push whenever you add some new live content such as a webcast in addition to a standing monthly push.

Before you Begin

Refer to the **Marketo INXPO Adapter Setup Guide** to make sure you have administrative access and connectivity between INXPO & Marketo.

Step-by-Step Guide

1. Log into the INXPO Admin Portal
2. Navigate to Platform Builder and within your event, choose Event Setup / Marketo Settings



3. Each event can have multiple sets of mappings. If this is your first for this event, click the Add button. Otherwise, click the title of an existing one to edit.
4. Enter a Title (80 characters) for this set of mappings.
5. Enter a Description (255 characters) for this set of mappings.

MARKETO MAPPING EDIT	
Please edit your Marketo mapping settings.	
Marketo Mapping Attributes	
Title	<input type="text" value="Live Days set of fields"/> <small>The title of this specific data transfer. This is also displayed within your Marketo system. The max number of characters for this input field is 80.</small>
Description	<input type="text" value="March 15 CEO Roundtable Live"/> <small>The description of this specific data transfer. This is also displayed within your Marketo system. The max number of characters for this input field is 255</small>
Marketo Endpoint	<input type="text"/> <small>The Endpoint assigned to your Marketo instance. The max number of characters for this input field is 255.</small>
Marketo User	<input type="text"/> <small>The Marketo API Administrative User ID assigned to your Marketo instance.</small>
Marketo Password	<input type="password"/> <small>The Marketo API Administrative Password assigned to your Marketo instance.</small>
Login Restriction	<input checked="" type="checkbox"/> <small>By selecting this checkbox, the data exchange will only be performed for event participants that have logged in at least once.</small>

6. Enter the three settings for your Marketo SOAP API. Instructions for gathering these are found in the **Marketo INXPO Adapter Setup Guide**. These provide the connectivity between INXPO and Marketo.
 - a. SOAP endpoint
 - b. User ID
 - c. Encryption Key

If you have successfully typed in the three Marketo settings, then the bottom of the screen appears with the Marketo Lead Fields that are to be mapped to INXPO fields.

7. Login Restriction checkbox

When checked, the integration will send the user details only for those users who attended, not just registered. As such, consider the registration source(s) for your attendees.

- Events that use INXPO or a third-party for registration. If so, this check should not be selected.
- Events that use Marketo for registration, which had pushed some of this information to INXPO via Marketo Webhooks. If so, check the box.

8. Mappings

This section displays one row per Marketo Lead Field, including rows for both standard and custom Marketo fields. For each Marketo field, you may choose to map it to an INXPO field, or per field, you may choose not to map, as shown by “(none)” in the screenshot.

Email Address	EMail Address
Fax Number	(none)
First Name	First Name
Industry	(none)
Inferred Company	Company Name
Inferred Country	Country
Last Name	Last Name

Below, the INXPO fields have been grouped into categories for a better understanding of the broad types of information available for mapping.

Category	Mappable Field	Notes
Profile	Email Address	
	Full Name	
	First Name	
	Last Name	
	Company Name	
	Job Title	
	Phone	
	Phone 2	
	Address 1	
	Address 2	
	Address 3	
	City	
	State/Prov	
	Country	
	Postal Code	
	Time Zone	
	Locale	
	Skype ID	
	AOL ID	
	Yahoo ID	
MSN ID		
Twitter ID		
	User Defined Fields	0, 1 or multiple custom INXPO profile fields
Registration	Registration Package	
	Registration Date	
	Affiliate Key	
	Affiliate Data	
Activity	Attended Event: Login Count	Count the number of times each attendee has logged-into the event
	Attended Event: Preview Event	Yes/No based on the user having attended during "preview" phase
	Attended Event: Live	Yes/No based on the user having attended during "live" phase
	Attended Event: After Event	Yes/No based on the user having attended during "on demand" phase

Category	Mappable Field	Notes
Activity (continued)	Viewed Presentations	A large string of presentation titles viewed by each attendee, pipe-delimited
	Viewed Presentations: Unique Count	Count the number of unique presentations each attendee has viewed
	Viewed Document/Links	A large string of document titles viewed by each attendee, pipe-delimited
	Viewed Document/Links : Unique Count	Count the number of unique documents each attendee has viewed
	Lead Report Card Grade	An administrator-configurable scoring of user engagement
	{Event Survey Questions}	0, 1 or multiple custom questions with preset response choices
Event & Identifiers	External User ID	
	External Show ID	
	Show Key	
	Event Title	
	Login ID	
	Unique User : Event ID	
Constant	Constant Value	When mapped to Marketo, this field is unique. It will provide a dedicated text entry box to send over as a hard-coded value.

- Click the Save button at the bottom of the Marketo Settings screen.

Scheduling Data Transfers

10. Click Schedule

Frequency	Start/End Date	Delete
Daily	2013-11-01 19:00 2013-11-03 19:05	Delete

Monthly	11/04/2013	8	:	30	PM
	02/04/2014	8	:	45	PM

ADD NEW CLOSE

11. Choose a Frequency

- One-time push**, choose Daily, set a Start Date, and set the End Date to be the same as the Start Date.
- Daily push**, choose Daily, set a Start Date specifying the time-of-day for the first transfer and also a future End Date for when to stop. After the Start Date transfer, the INXPO Server will transfer data every 24 hours.
- Weekly push**, choose Daily, set a Start Date specifying the time-of-day for the first transfer and also a future End Date for when to stop. After the Start Date transfer, the INXPO Server will transfer data every 7 days.
- Monthly push**, choose Daily, set a Start Date specifying the time-of-day for the first transfer and also a future End Date for when to stop. After the Start Date transfer, the INXPO Server will transfer data each month.

12. Click Add New

13. Repeat Steps 11 & 12 for each schedule

14. Click Close

15. On the Marketo Settings screen, the column “Last Status” will display messages such as “Sending Data to Marketo” and “Data Sent to Marketo”.

Reporting

The following types of INXPO reports are included with the Marketo integration.

- **Field Mappings**
This report is a detailed listing of the INXPO event’s sets of field mappings for data transfer to Marketo. The output contains all Settings’ titles as well as the source INXPO fields & destination Marketo Lead fields. This is especially useful when your event supports multiple marketing campaigns with multiple sets of mappings, because each set may contain rather different content from one another.
- **Integration Schedule**
This report is a timetable of the event’s scheduled integrations. The output contains each schedules’ Frequency and Date/Time range.
- **Data Transfer History**
This report is a chronological audit of the event’s previous data transfers, including integration date/time, status and which administrator configured the transfer.

Additional Resources

- For sales related questions, please email the INXPO Sales team at contactsales@inxpo.com.
- For technical questions, please email the INXPO Solutions team at vxhelp@inxpo.com.