



Onstream Webinars for Marketo

User Guide

Revised 02/09/2016

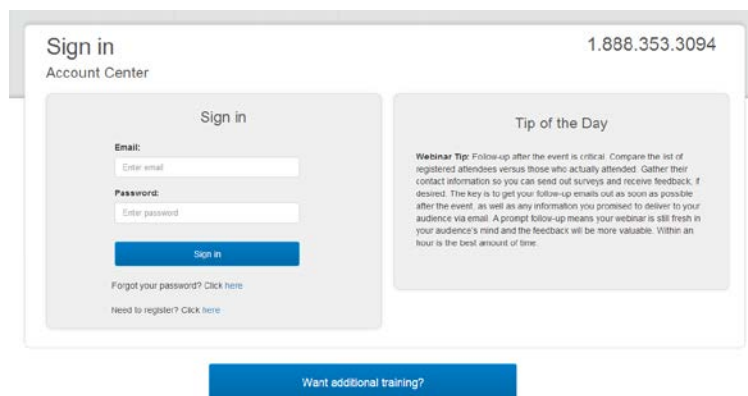
Configuring Onstream Webinars for Marketo

Note – You must be a Marketo Administrator to properly configure the Onstream Webinars/Marketo integration. If you are not a Marketo Administrator for your organization, contact your Administrator for assistance in configuring this integration.

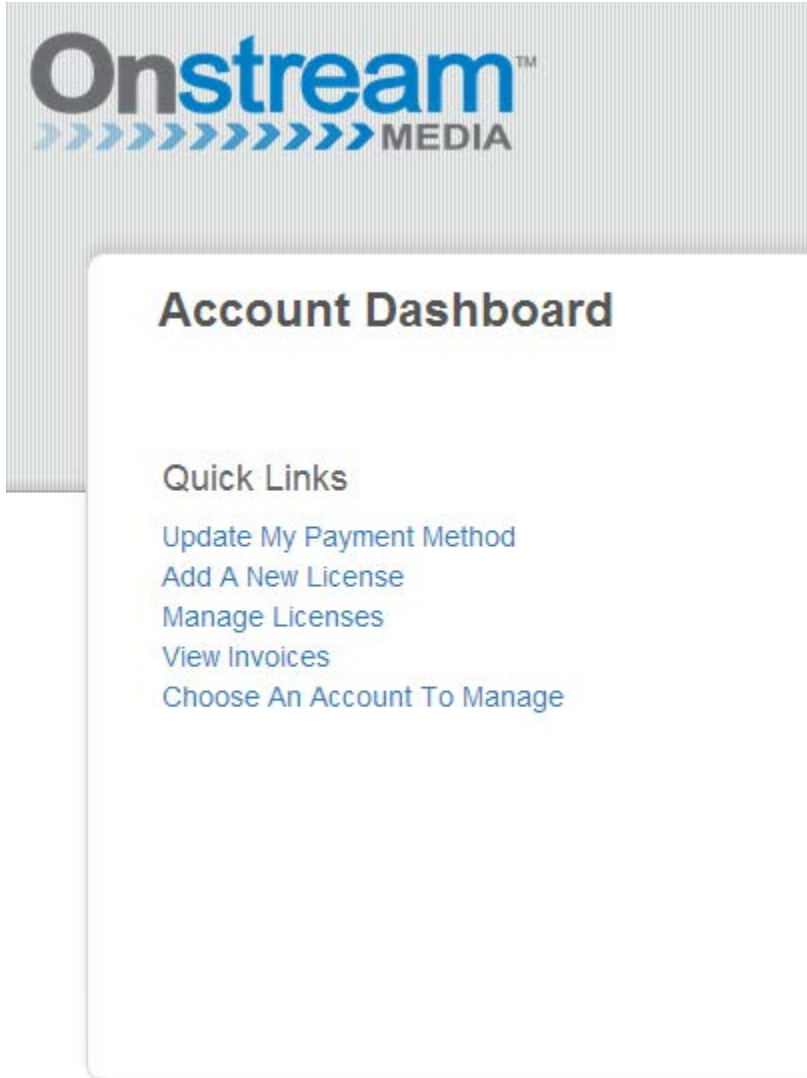
Note – You must have an active Onstream Webinars license with API credentials in order to configure this integration. To request your API credential, please email support@onstreamwebinars.com.

Note – Contact your Marketo representative to request the Onstream Webinars Program Template.

1. Once the Onstream Webinars Program Template has been successfully installed within your Marketo instance, you can proceed to create your Onstream Webinars event.
2. Go to my.onstreammedia.com and log into the customer portal. If you haven't already signed up for the customer portal, please register to gain access.



3. Once logged in, click on **Manage Licenses**, located in the Quick Links menu.



4. Navigate to the user you would like integrate with and click **Partner Integrations**.

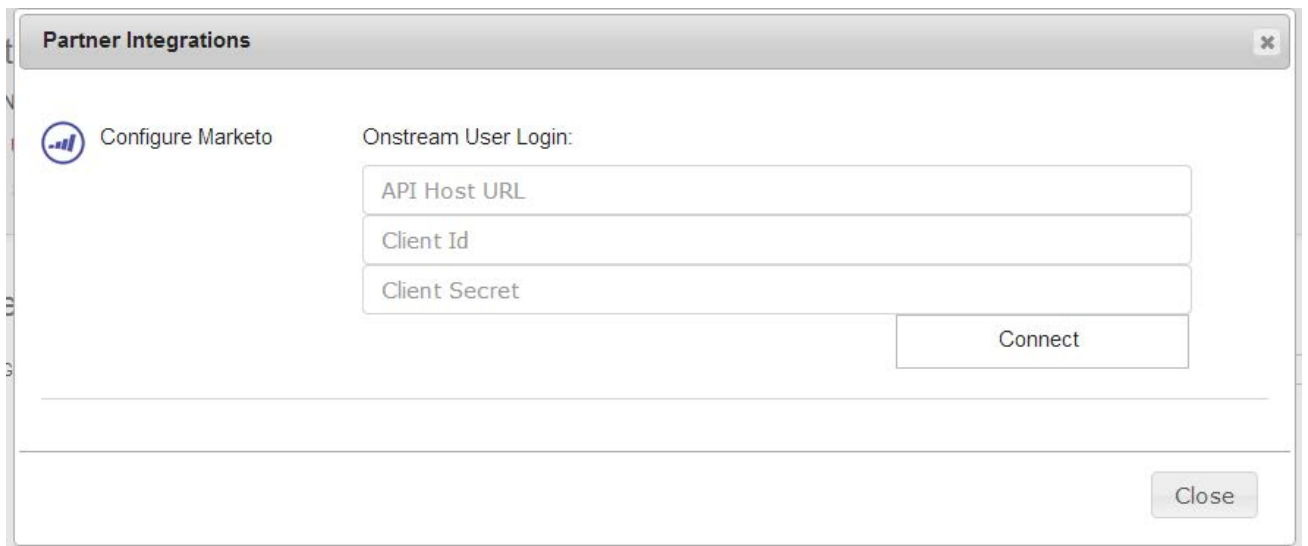
Manage Users

 Amber Green	 ambertest4999@gmail.com	 Monthly 25 Participant Meeting with Audio	 02/16	Edit This License	Partner Integrations
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5. A pop up window will appear which will allow you to add Marketo as an integration option as follows.




6. Click on **Add New Partner** and connect to Marketo by adding your **API Host URL**, **Client ID** and **Client Secret**, provided by Marketo.



7. Once credentials have been entered, click **Connect**.


Partner Integrations ✕

 Configure Marketo

Onstream User Login:

8. Once you have successfully connected, a message will appear indicating that **“You are connected”**. Scroll down on the page to the **Manage Sessions** section located below the configuration section.

Partner Integrations ✕

 Configure Marketo

Onstream User Login: ambertest4999

You are connected!

Manage Sessions for ambertest4999

No sessions exist for this user

9. Click on **Add New Session** to create a new webinar to link to Marketo.

Note: This section allows you to create and launch webinars without you having to log into Onstream Webinars directly.

Manage Sessions for ambertest4999

No sessions exist for this user

Add New Session

Close

10. Add the **Title**, **Date**, **Time** and **Duration** and click **Save**.

Manage Sessions for ambertest4999

No sessions exist for this user

Add Session

The Best Webinar Ever...

05/01/2016

1:00

60 minutes ▼

Cancel



Save

Close

11. Now that the session has been added, you can **Launch, Edit** or **Delete** the session from this interface.

Note: Please make note of the session **ID** as is it will be required when configuring your event within Marketo.

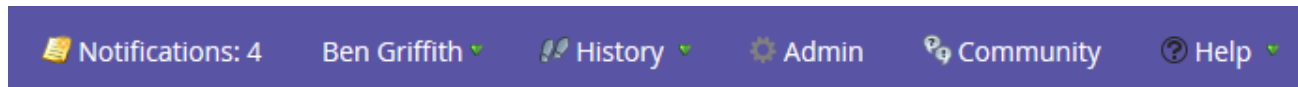
Manage Sessions for ambertest4999

ID: 2714  The Best Webinar Ever...  5/1/2016 60 Minutes

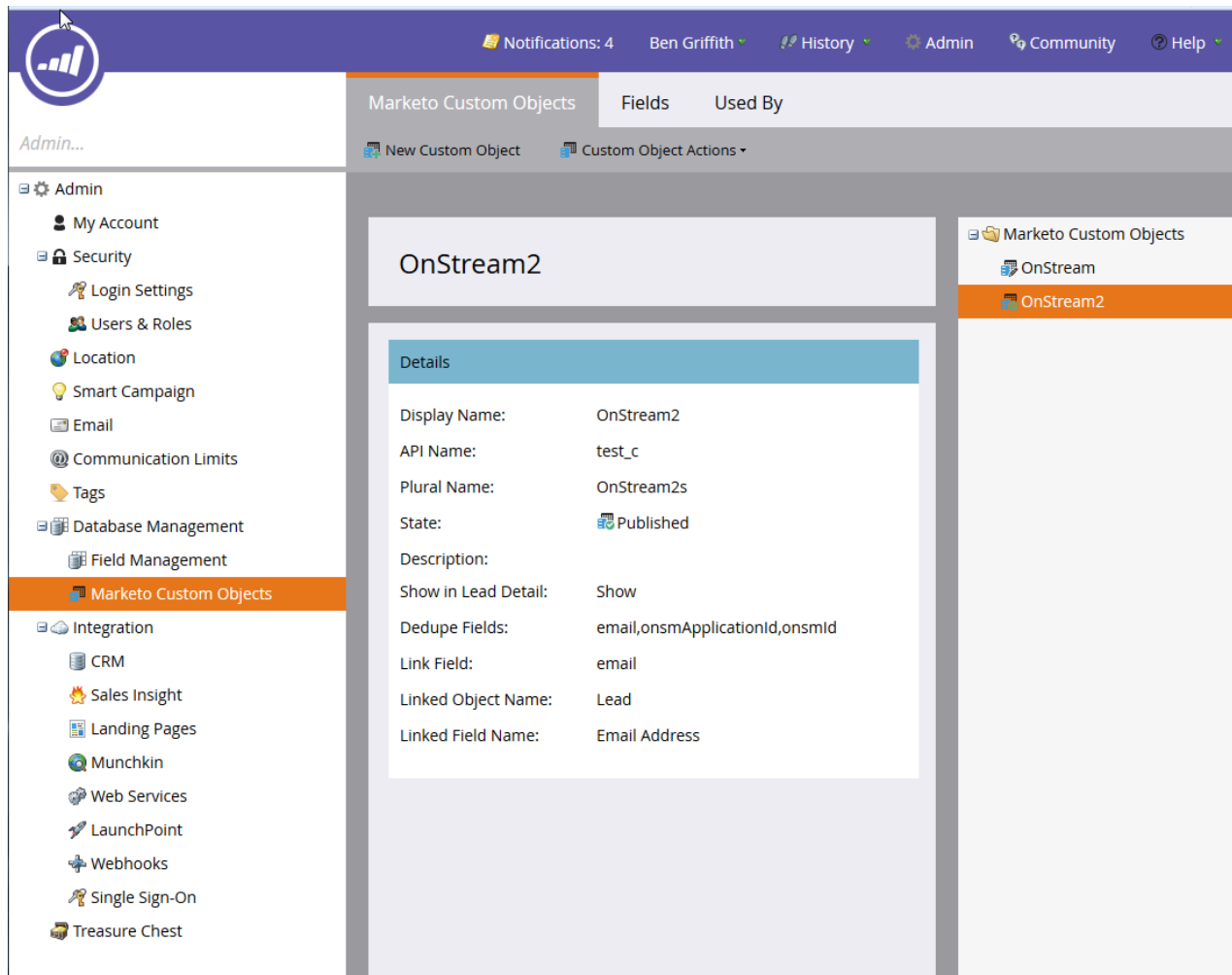
Once this step is complete you can begin configuring Marketo.

Configuring the Onstream Webinars Marketo Custom Object

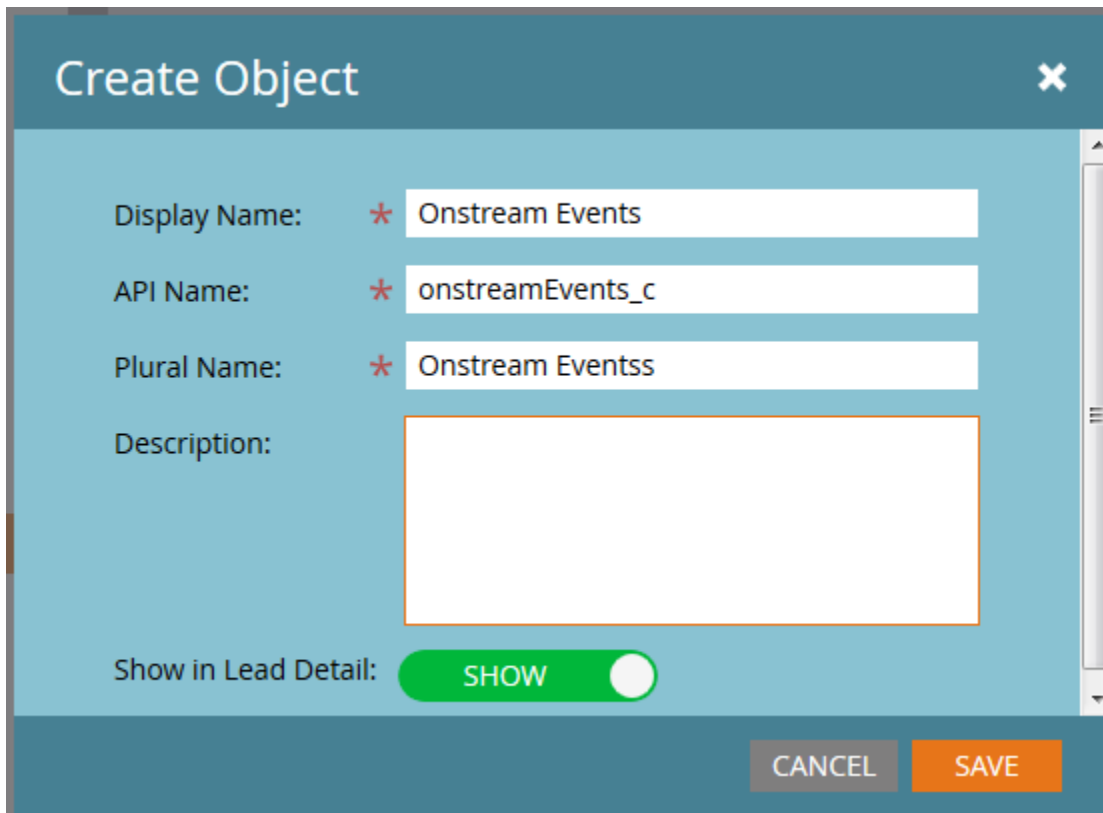
1. Create the **Marketo Custom Object** that Onstream will save Event Data too by navigating to the Admin Section (Top Right).



Custom Objects can be accessed from the left hand menu by Expanding Admin → Database Management → Click Marketo Custom Objects.



Click the “New Custom Object” button under the “Marketo Custom Objects” tab to create the Marketo Custom Object, and open the Create Object Window displayed below. Set the “Display Name” to “Onstream Events”. The API Name, and Plural Name will auto populate based off the display name. Set “Show in Lead Detail” to “Show”, and then click “Save to create the Custom Object.



Create Object [Close]

Display Name: * Onstream Events

API Name: * onstreamEvents_c

Plural Name: * Onstream Eventss

Description:

Show in Lead Detail: SHOW

CANCEL SAVE

After creating the Custom Object you will need to create the fields on it by clicking on the “Fields” tab. Click the “New Field” to begin creating the link field for email as shown below, click “Save” to create the field.

Display Name: email

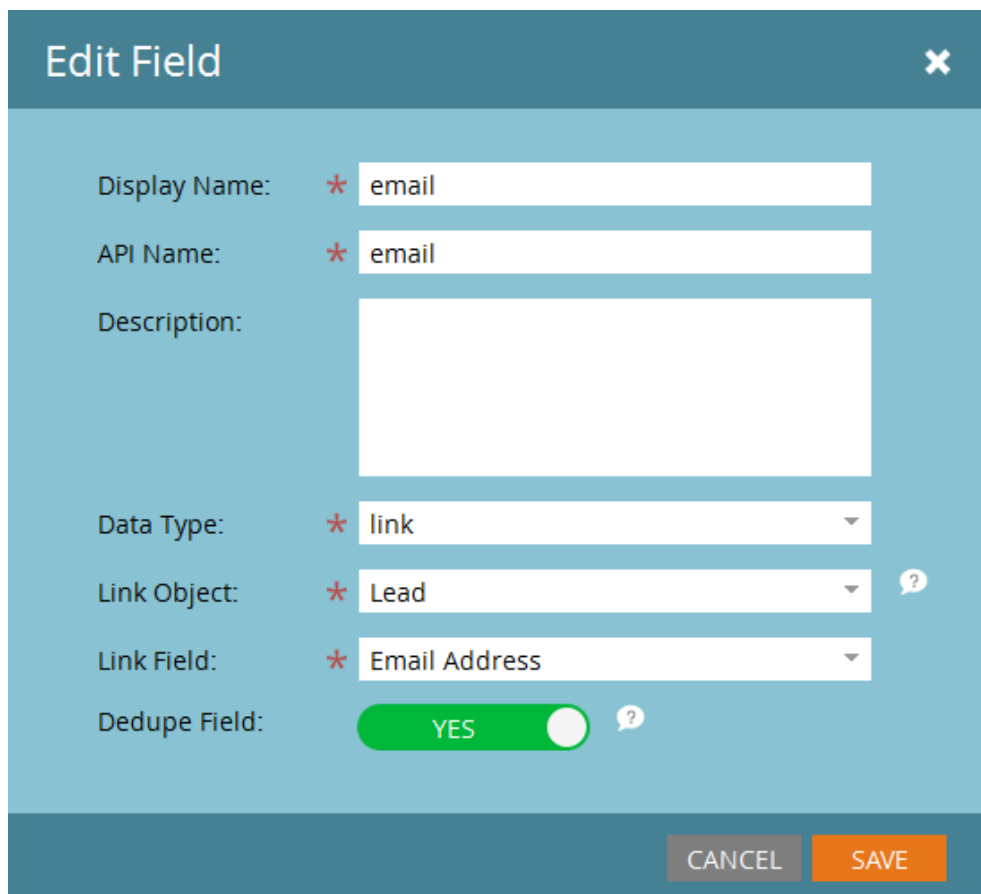
API Name: email

Data Type: link

Link Object: Lead

Link Field: Email Address

Dedupe Field: YES



Edit Field [Close]

Display Name: * email

API Name: * email

Description:

Data Type: * link

Link Object: * Lead

Link Field: * Email Address

Dedupe Field: YES

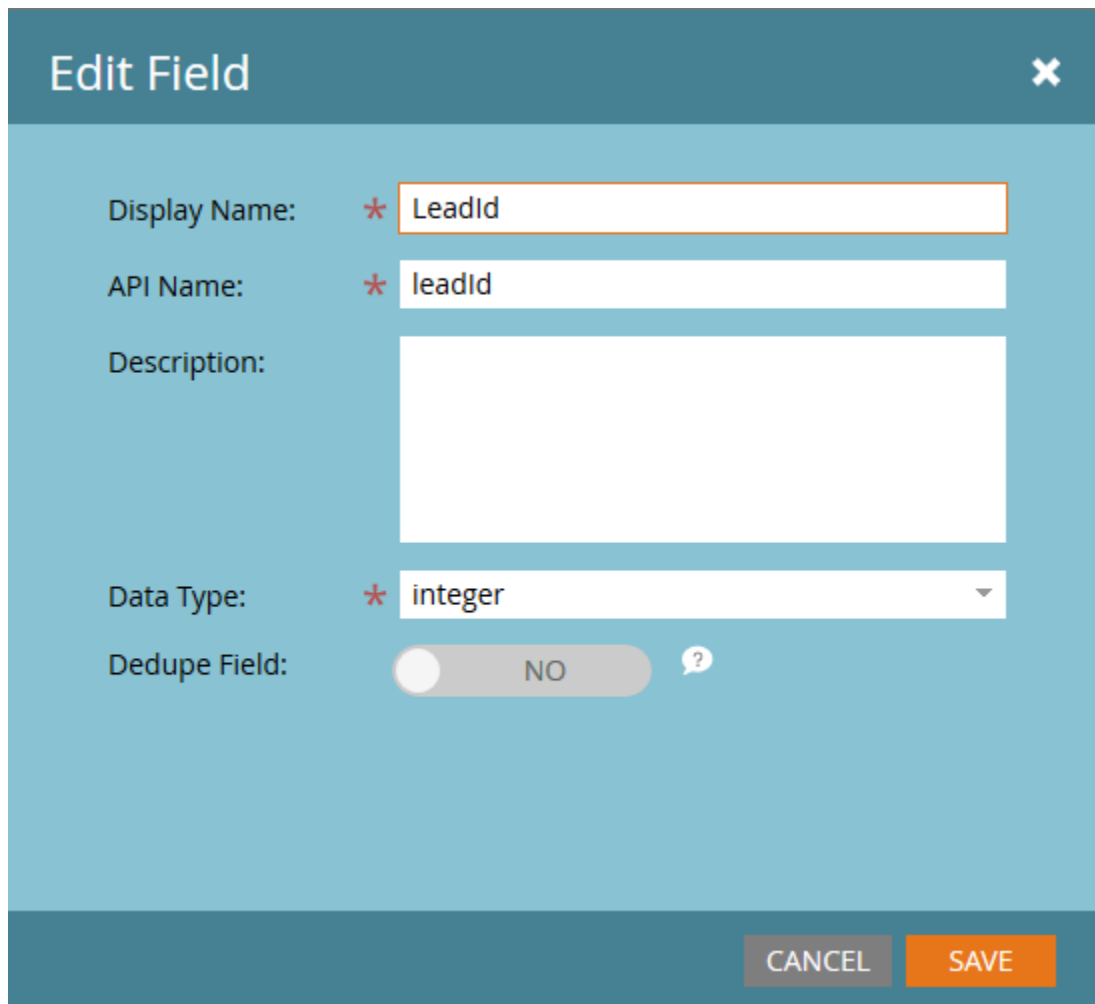
[CANCEL] [SAVE]

Next the LeadID field needs to be created with the below settings. After configuring the field click “Save” to create the field.

Display Name: LeadId

API Name: leadId

Data Type: integer



Edit Field ✕

Display Name: *

API Name: *

Description:

Data Type: *

Dedupe Field: NO ?

CANCEL SAVE

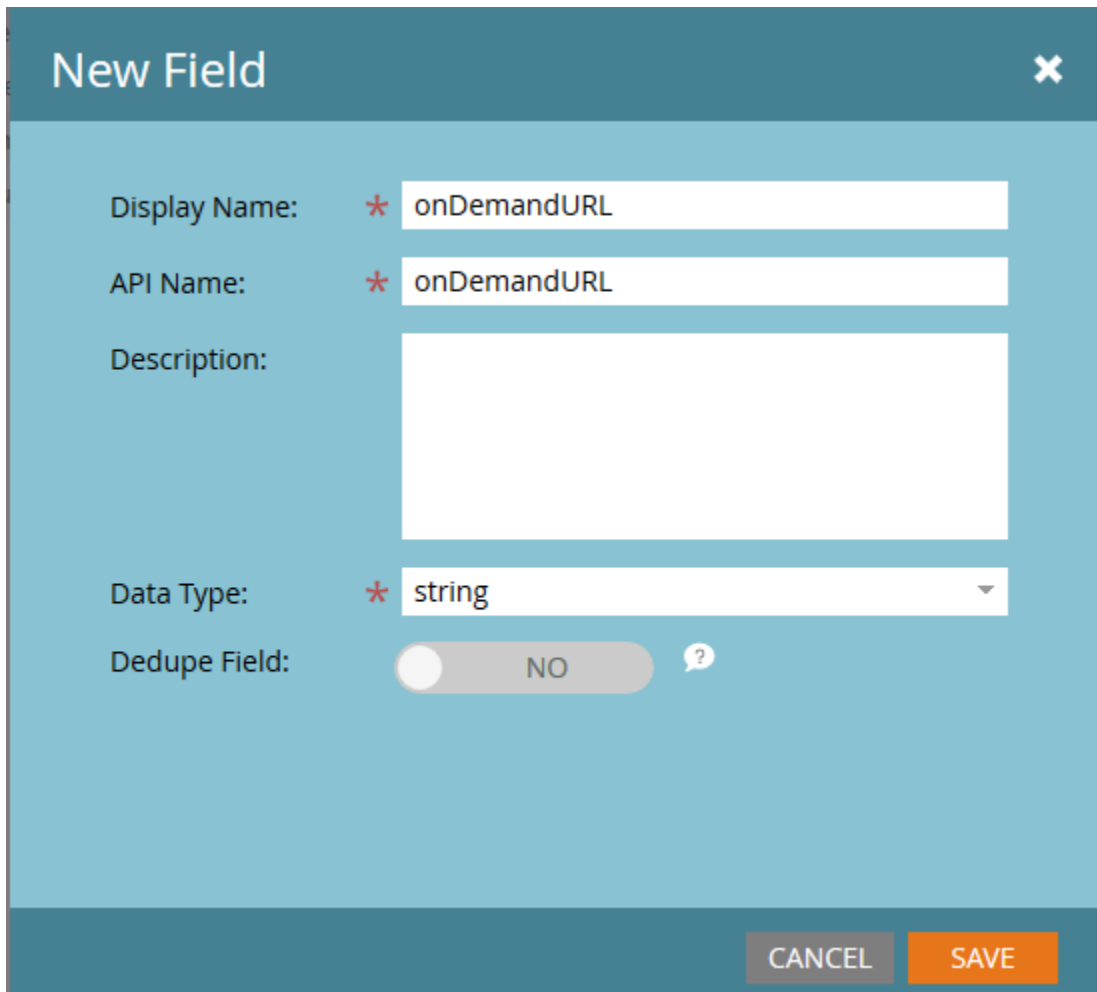
Repeat the above process for each of the fields using the configurations shown below.

onDemandURL

Display Name: onDemandURL

API Name: onDemandURL

Data Type: string



New Field ×

Display Name: * onDemandURL

API Name: * onDemandURL

Description:

Data Type: * string

Dedupe Field: NO ?

CANCEL SAVE

Display Name: onsmApplicationId

API Name: onsmApplicationId

Data Type: string

Dedupe Field: YES

Edit Field ✕

Display Name: *

API Name: *

Description:

Data Type: *

Dedupe Field: YES ?

Display Name: onsmAttended

API Name: onsmAttended

Data Type: Boolean

Edit Field ✕

Display Name: *

API Name: *

Description:

Data Type: *

Dedupe Field: NO ?

Display Name: onsmld

API Name: onsmld

Data Type: string

Dedupe Field: YES

Edit Field ✕

Display Name: * onsmld

API Name: * onsmld

Description:

Data Type: * string ▼

Dedupe Field: YES ?

CANCEL SAVE

Display Name: onsmNotAttended

API Name: onsmNotAttended

Data Type: boolean

Edit Field ✕

Display Name: *

API Name: *

Description:

Data Type: *

Dedupe Field: NO ?

Display Name: onsmRegistered

API Name: onsmRegistered

Data Type: boolean

Edit Field ✕

Display Name: *

API Name: *

Description:

Data Type: *

Dedupe Field: NO ?

Display Name: SessionURL

API Name: SessionURL

Data Type: string

Edit Field ✕

Display Name: *

API Name: *

Description:

Data Type: *

Dedupe Field: NO ?

Display Name: OnStream User ID

API Name: uid

Data Type: integer

Edit Field ✕

Display Name: *

API Name: *

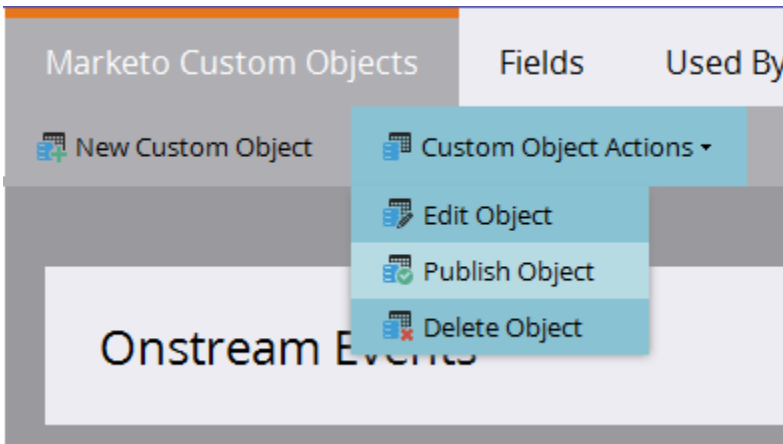
Description:

Data Type: *

Dedupe Field: NO ?

After creating all of the fields it should appear as below. You will notice that the State of all the fields is currently displayed as “New”, this means that the Updates made to the Marketo Custom Object are still in “Draft” and need to be published in order to take effect. Click back into the Marketo Custom Objects Tab, under the Custom Object Actions drop down Menu, click “Publish Object” to approve the draft.

Display Name	API Name	Type	State
Created At	createdAt	datetime	★New
email	email	link	★New
LeadId	leadId	integer	★New
Marketo GUID	marketoGUID	string	★New
onDemandURL	onDemandURL	string	★New
onsmApplicationId	onsmApplicationId	string	★New
onsmAttended	onsmAttended	boolean	★New
onsmId	onsmId	string	★New
onsmNotAttended	onsmNotAttended	boolean	★New
onsmRegistered	onsmRegistered	boolean	★New
SessionURL	sessionURL	string	★New
OnStream User ID	uid	integer	★New
Updated At	updatedAt	datetime	★New

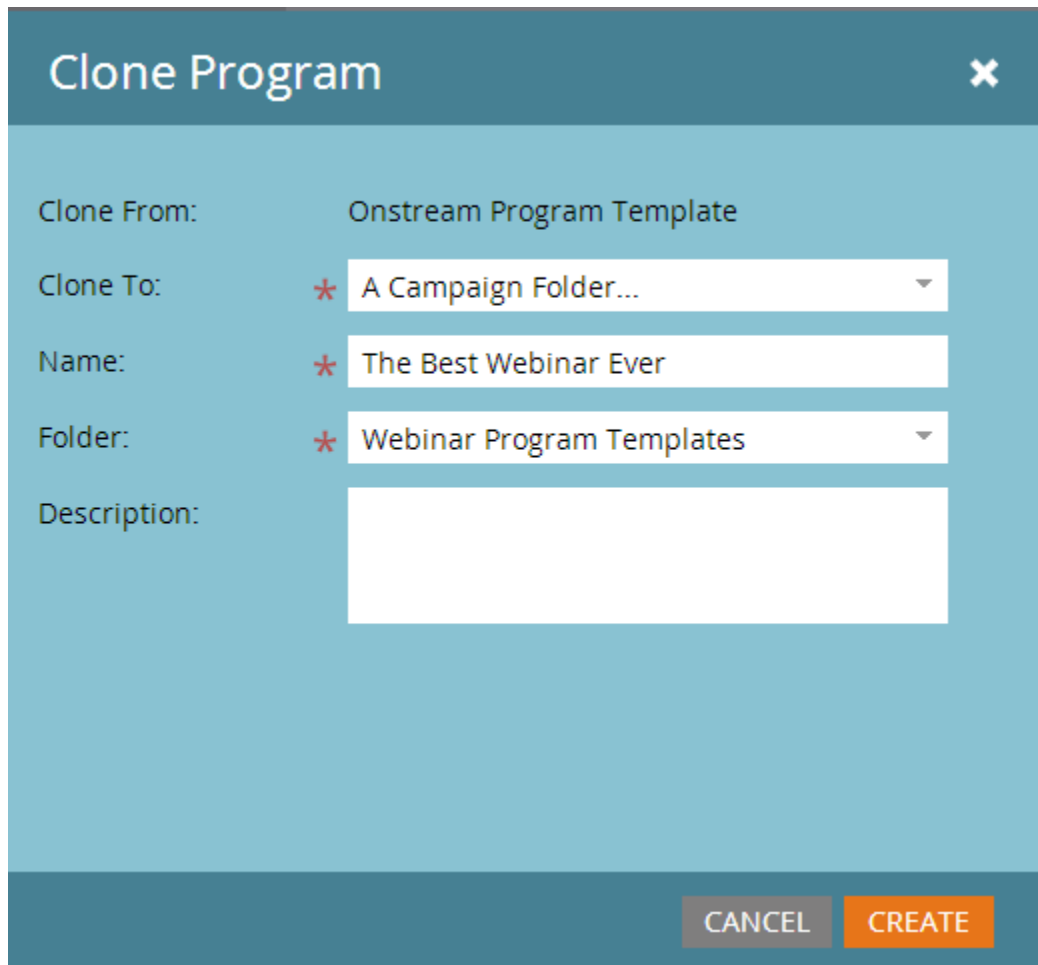


Configuring the Onstream Webinars Program Template

1. From the **Marketing Activities** section, click on **Webinar Program Templates** and select the **Onstream Program Template**.
2. Right click on the **Onstream Program Template** and select **Clone**.

Note: You will be required to create a new clone for each one of your events/sessions.

3. **Clone To: A Campaign Folder**, Enter the Title of your event in the **Name** field, Select the **Webinar Program Templates** Folder and click **Create**.



Clone Program [Close]

Clone From: Onstream Program Template

Clone To: * A Campaign Folder... [Dropdown]

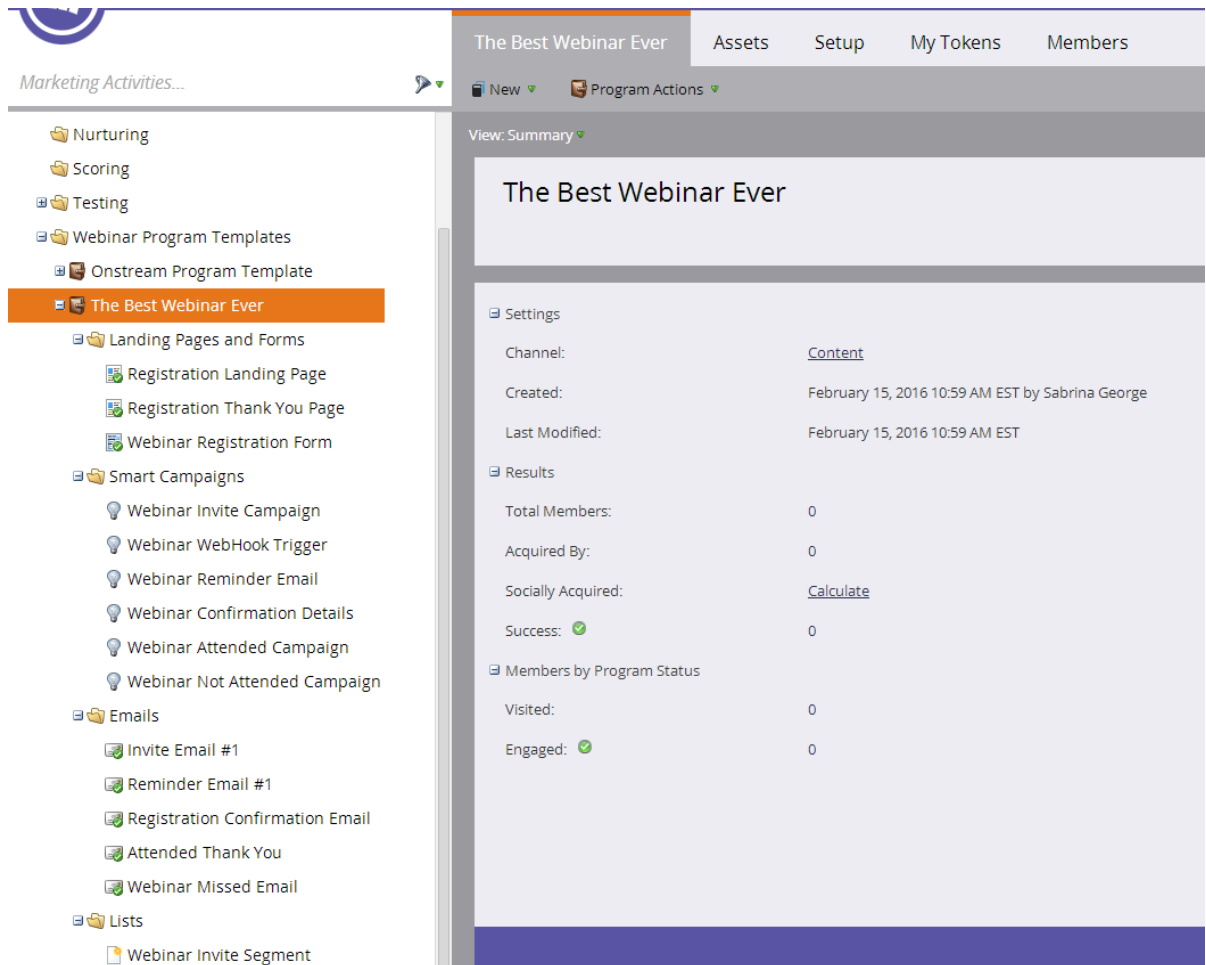
Name: * The Best Webinar Ever [Text]

Folder: * Webinar Program Templates [Dropdown]

Description: [Text Area]

[CANCEL] [CREATE]

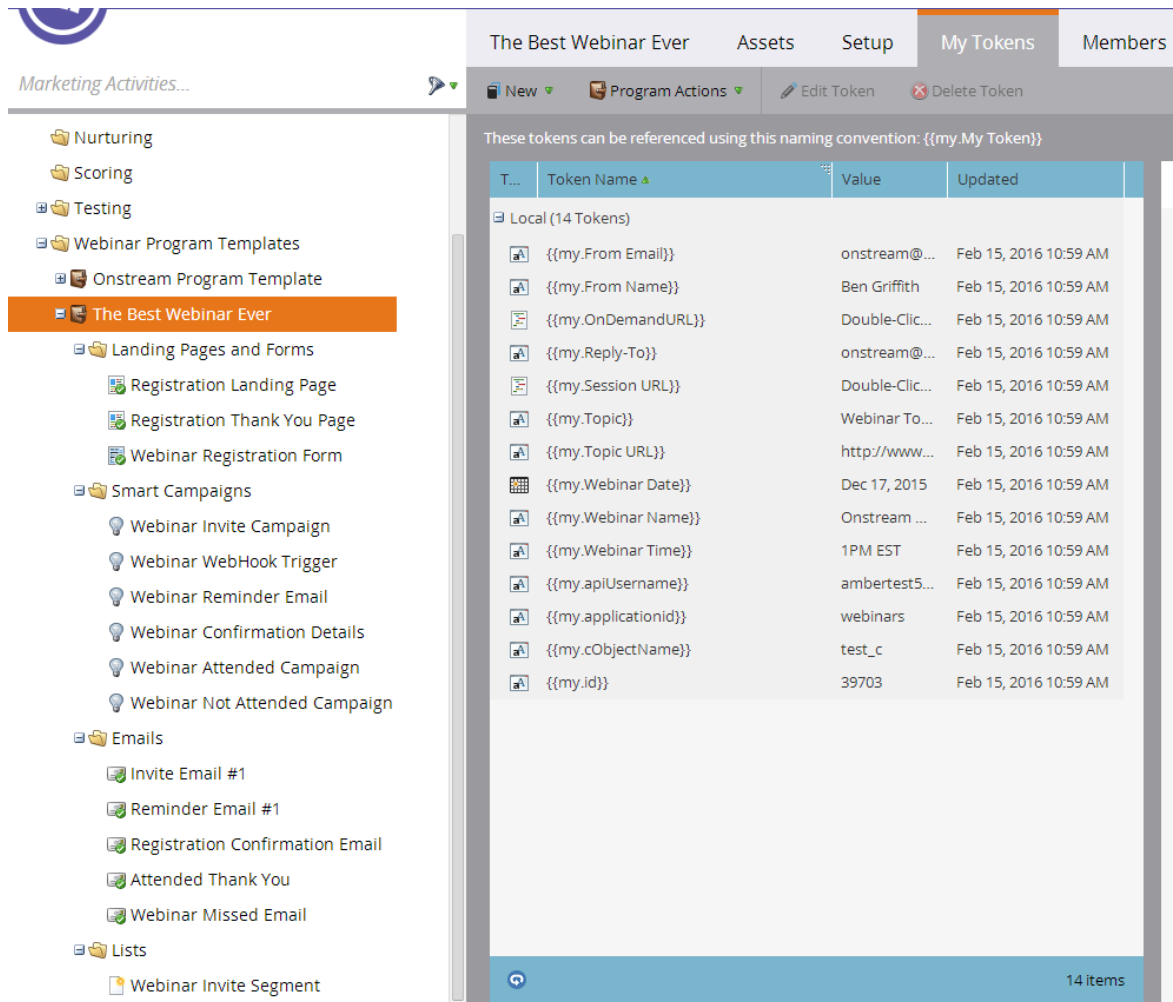
4. Once the program has been cloned, it will appear in your **Marketing Activities**, where you can begin configuring your event by clicking on the webinar title and collapsing the folder.



The screenshot displays the Marketo interface for configuring a webinar program. On the left, a navigation menu under 'Marketing Activities...' lists various folders and items, with 'The Best Webinar Ever' highlighted in orange. The main content area shows the program details for 'The Best Webinar Ever', including settings, results, and member status.

Category	Item	Value
Settings	Channel:	Content
	Created:	February 15, 2016 10:59 AM EST by Sabrina George
	Last Modified:	February 15, 2016 10:59 AM EST
Results	Total Members:	0
	Acquired By:	0
	Socially Acquired:	Calculate
	Success: ✓	0
Members by Program Status	Visited:	0
	Engaged: ✓	0

5. Click on **My Tokens** to configure your webinar settings. Most of these Tokens are used in your email communications with a few exceptions:



The screenshot shows the Marketo interface for configuring webinar settings. The left sidebar contains a navigation menu with categories like Nurturing, Scoring, Testing, and Webinar Program Templates. The 'The Best Webinar Ever' program is selected. The main content area shows the 'My Tokens' tab, which displays a table of tokens that can be referenced in email communications.

These tokens can be referenced using this naming convention: `{{my.My Token}}`

T...	Token Name ▲	Value	Updated
Local (14 Tokens)			
🔗	{{my.From Email}}	onstream@...	Feb 15, 2016 10:59 AM
🔗	{{my.From Name}}	Ben Griffith	Feb 15, 2016 10:59 AM
🔗	{{my.OnDemandURL}}	Double-Clic...	Feb 15, 2016 10:59 AM
🔗	{{my.Reply-To}}	onstream@...	Feb 15, 2016 10:59 AM
🔗	{{my.Session URL}}	Double-Clic...	Feb 15, 2016 10:59 AM
🔗	{{my.Topic}}	Webinar To...	Feb 15, 2016 10:59 AM
🔗	{{my.Topic URL}}	http://www...	Feb 15, 2016 10:59 AM
📅	{{my.Webinar Date}}	Dec 17, 2015	Feb 15, 2016 10:59 AM
🔗	{{my.Webinar Name}}	Onstream ...	Feb 15, 2016 10:59 AM
🔗	{{my.Webinar Time}}	1PM EST	Feb 15, 2016 10:59 AM
🔗	{{my.apiUsername}}	ambertest5...	Feb 15, 2016 10:59 AM
🔗	{{my.applicationid}}	webinars	Feb 15, 2016 10:59 AM
🔗	{{my.cObjectName}}	test_c	Feb 15, 2016 10:59 AM
🔗	{{my.id}}	39703	Feb 15, 2016 10:59 AM

14 items

Event URL & Post Event Recording URL Tokens

my.OnDemandURL: Used in your email communications to provide the registrant with a link to the events recording URL.

My.Session URL: Provides registrants with a link to your Onstream Event

Both fields require you to update the field to match your events ID and Application ID by double clicking on the field.



Next click on “Click to Edit” to open the Script Token for editing.

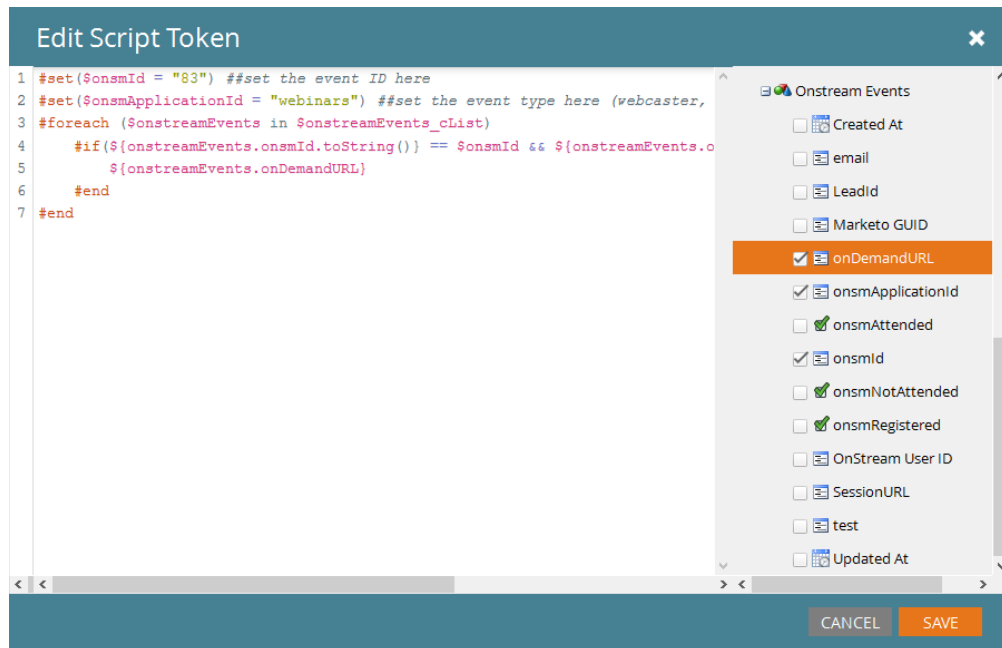
Type	Token Name	Value	Updated
Local (13 Tokens)			
	{{my.From Email}}	no-reply@onstreammedia.com	Feb 17, 2016 1:35 PM
	{{my.From Name}}	Onstream Webinars	Feb 17, 2016 1:36 PM
	OnDemandURL	Click to Edit	Jan 25, 2016 12:43 PM
	{{my.Reply-To}}	no-reply@onstreammedia.com	Feb 17, 2016 1:36 PM

There only two parts of the Script Token that need to be edited in the first two lines.

Line 1, the value for \$onsmId = “INSERT EVENT ID HERE” which can be retrieved from Onstream needs to be updated to reflect the event you are configuring the program for.

Line 2, the value for \$onsmApplicationId = “INSERT EVENT TYPE HERE” must be set to reflect the event type you configuring the program for, currently the Onstream / Marketo Integration support two different event types (“webinars” or “webcaster”).

You will also need to find and check the fields off on the left hand menu. Expand Custom Objects → Onstream Events → Check onsmApplicationId → Check onsmId → Check OnDemandURL or SessionURL → Click the “Save Button” to save the updates. Click the “Save” button on the token to Save the latest updates.



my.OnDemandURL Example Code:

```
#set($onsmId = "83") ##set the event ID here
#set($onsmApplicationId = "webinars") ##set the event type here (webcaster, webinars, meetings)
#foreach ($onstreamEvents in $onstreamEvents_cList)
    #if(${onstreamEvents.onsmId.toString()} == $onsmId &&
    ${onstreamEvents.onsmApplicationId} == $onsmApplicationId)
        ${onstreamEvents.onDemandURL}
    #end
#end
```



my.Session URL Example Code:

```
#set($onsmId = "83") ##set the event ID here
#set($onsmApplicationId = "webinars") ##set the event type here (webcaster, webinars,
meetings)
#foreach ($onstreamEvents in $onstreamEvents_cList)
    #if(${onstreamEvents.onsmId.toString()} == $onsmId &&
${onstreamEvents.onsmApplicationId} == $onsmApplicationId)
        ${onstreamEvents.onDemandURL}
    #end
#end
```

My.Webinar Date: set the date for your webinar using the calendar picker. This token is being used by the Email Reminder Smart Campaign to send a Reminder email automatically to registrants 7 days before the event begins at 10AM EST by default. If no date is set or, if the date has already passed the Reminder Email will be sent as soon as the person registers

my.apiUsername: you will need to set this to match your Onstream API Username.

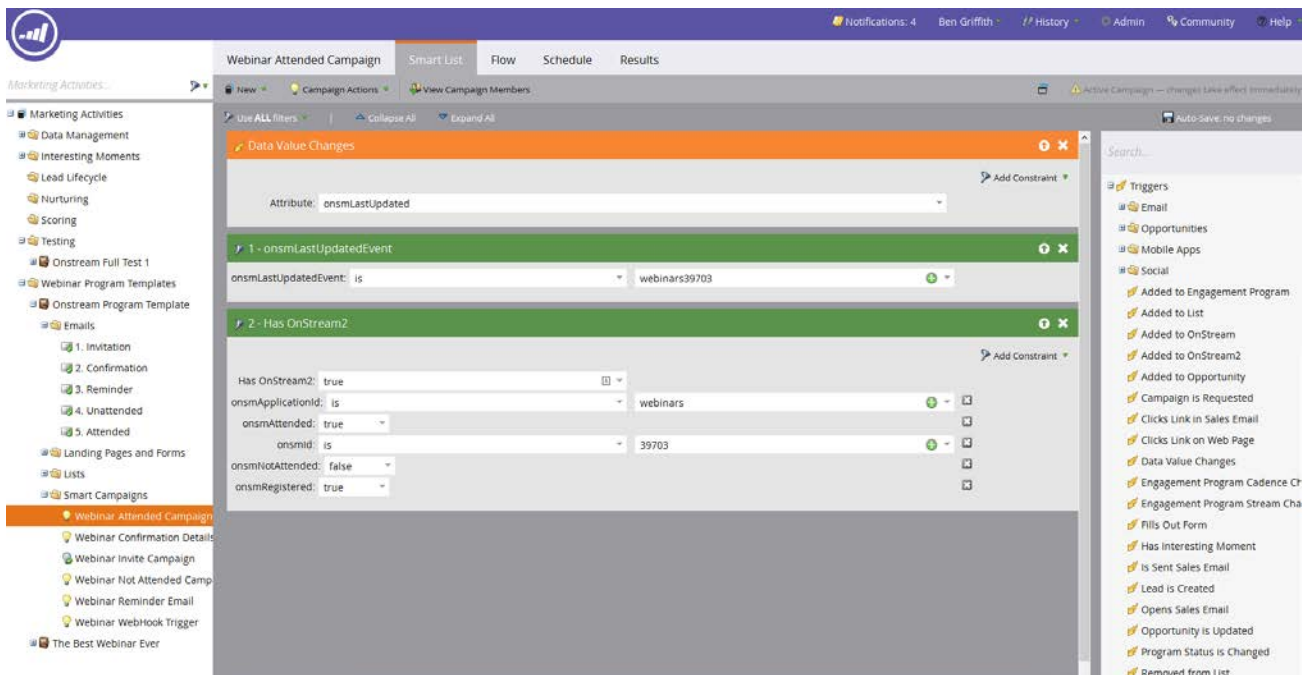
my.applicationid: must be set to reflect the event type you configuring the program for, currently the Onstream / Marketo Integration support two different event types (“webinars” or “webcaster”).

my.Id: Id of the event, can be found by logging into Onstream

my.cObjectName: This token contains the name of the custom object Onstream is storing registrant data in. The default value for this field will match the existing

6. Set **Smart Campaign's Smart list Criteria** by expanding the Smart Campaigns folder and going through the following Campaigns:

- Webinar Attended Campaign
- Webinar Confirmation Details
- Webinar Not Attended Campaign
- Webinar Reminder Email
- Webinar WebHook Trigger





Webinar Attended Campaign:

1 – onsmLastUpdatedEvent: This Filter has only the one field which is a combination of the my.applicationid's value and the my.ids value and needs to be updated to match your event.

2 – Has Onstream:

onsmApplicationId: needs to be updated to match your event type (“webinars” or “webcaster”

onsmId: needs to be updated to match your Event’s ID (obtained from Onstream)

The rest of the fields are configured correctly with their default settings.

The screenshot shows two filter rules in a Marketo interface:

- Rule 1: onsmLastUpdatedEvent**
 - Field: onsmLastUpdatedEvent
 - Operator: is
 - Value: webinars39703
- Rule 2: Has OnStream2**
 - Field: Has OnStream2
 - Operator: true
 - Field: onsmApplicationId
 - Operator: is
 - Value: webinars
 - Field: onsmAttended
 - Operator: true
 - Field: onsmId
 - Operator: is
 - Value: 39703
 - Field: onsmNotAttended
 - Operator: false
 - Field: onsmRegistered
 - Operator: true



Webinar Not Attended Campaign:

1 – onsmLastUpdatedEvent: This Filter has only the one field which is a combination of the my.applicationid’s value and the my.ids value and needs to be updated to match your event.

2 – Has Onstream:

onsmApplicationId: needs to be updated to match your event type (“webinars” or “webcaster”

onsmId: needs to be updated to match your Event’s ID (obtained from Onstream)

The rest of the fields are configured correctly with their default settings.

The screenshot shows the Marketo filter configuration interface. It displays two filter rules:

- 1 - onsmLastUpdatedEvent**:
 - Field: onsmLastUpdatedEvent
 - Operator: is
 - Value: webinars39703
- 2 - Has OnStream2**:
 - Field: Has OnStream2
 - Operator: true
 - Field: onsmApplicationId
 - Operator: is
 - Value: webinars
 - Field: onsmAttended
 - Operator: false
 - Field: onsmId
 - Operator: is
 - Value: 39703
 - Field: onsmNotAttended
 - Operator: true
 - Field: onsmRegistered
 - Operator: true



Webinar Reminder Email:

1 – onsmLastUpdatedEvent: This Filter has only the one field which is a combination of the my.applicationid’s value and the my.ids value and needs to be updated to match your event.

2 – Has Onstream:

onsmApplicationId: needs to be updated to match your event type (“webinars” or “webcaster”

onsmId: needs to be updated to match your Event’s ID (obtained from Onstream)

The rest of the fields are configured correctly with their default settings.

The screenshot shows a Marketo filter configuration interface with two filters:

- Filter 1: 1 - onsmLastUpdatedEvent**
 - Field: onsmLastUpdatedEvent
 - Operator: is
 - Value: webinars39703
- Filter 2: 2 - Has OnStream2**
 - Field: Has OnStream2
 - Operator: true
 - Field: onsmApplicationId
 - Operator: is
 - Value: webinars
 - Field: onsmAttended
 - Operator: false
 - Field: onsmId
 - Operator: is
 - Value: 39703
 - Field: onsmNotAttended
 - Operator: false
 - Field: onsmRegistered
 - Operator: true

Onstream Marketo Integration Tokens Glossary

my.From Email:

- **Description** - Email Address that used on all email communications to indicate which email address is sending the email
- **Example Values** – “no-reply@onstreammedia.com”

my.From Name:

- **Description** - Name of the person sending the emails, email communications will be sent using this name
- **Example Values** – “Onstream Webinars”

my.OnDemandURL:

- **Description** – Past Event Recording URL, will merge in URL from the Custom Object into emails
- **Example Values** - This field is an Email Script Token, only the highlighted values below need to be changed:

```
#set($onsmId = "83") ##set the event ID here
#set($onsmApplicationId = "webinars") ##set the event type here (webcaster, webinars,
meetings)
#foreach ($onstreamEvents in $onstreamEvents_cList)
    #if(${onstreamEvents.onsmId.toString()} == $onsmId &&
${onstreamEvents.onsmApplicationId} == $onsmApplicationId)
        ${onstreamEvents.onDemandURL}
    #end
#end
```

my.Reply-To:

- **Description** - Email address leads can reply to for all email communications
- **Example Values** –“ no-reply@onstreammedia.com”



my.Session URL:

- **Description** - Link to the event users are registering to, used in email communications
- **Example Values** – This field is an Email Script Token, only the highlighted values below need to be changed:

```
#set($onsmId = "83") ##set the event ID here
#set($onsmApplicationId = "webinars") ##set the event type here (webcaster, webinars,
meetings)
#foreach ($onstreamEvents in $onstreamEvents_cList)
    #if(${onstreamEvents.onsmId.toString()} == $onsmId &&
${onstreamEvents.onsmApplicationId} == $onsmApplicationId)
        ${onstreamEvents.onDemandURL}
    #end
#end
```

my.TimeZone:

- **Description** - Used in email communications to indicate the events time zone
- **Example Values** – “Eastern”

my.Webinar Date:

- **Description** – Date of the event, used in email communications
- **Example Values** – “February 17, 2016”

my.Webinar Name:

- **Description** – Name of the event, used in email communications
- **Example values** – “Onstream Webinar”

my.WebinarTime:

- **Description** – Time the event is occurring, used in email communications
- **Example Values** – “1PM”

my.apiUsername:

- **Description** – Onstream API Username, can be found by logging into Onstream
- **ExampleValues** – “ambertest5000”

my.applicationid:



- **Description** - Onstream event type, used by the webservice to determine when
- **Example Values:** “webinars” or “meetings”

my.cObjectName:

- **Description** – Api name of the custom object Onstream will store event data in
- **Example Values** – “OnstreamCustomObject”

my.id:

- **Description** – Id of the Event, can be found by logging into Onstream
- **Example Values** – “39703”

Custom Object Fields Glossary

Create At:

Email:

- **Description** – Email address of the registrant
- **Example Values** – “test123@test.com”

Marketo GUID:

- **Description** – Standard Custom Object field. Custom Objects Unique Identifier automatically generated by Martketo
- **Example Values** -

onDemandURL:

- **Description** – Onstream will populate this field after an event has completed with a link to the event’s recording
- **Example Values** -

onsmApplicaitionId:

- **Description** – Onstream will write the events type to this field
- **Example Values** – “webinars” or “meetings”

onsmAttended:

- **Description** – Onstream will set this field to 1 if the lead attended the event, or 0 if the lead did not attend the event. Onstream populates this value after the event completes

- **Example Values** – “1” or “0”

onsmId:

- **Description** – Onstream will set this field to the events id after the user registers
- **Example Values** – “97603”

onsmIsInvited:

- **Description** – Need to confirm with Richard if this field is still being used
- **Example Values** -

onsmNotAttended:

- **Description** – Onstream will set this field to “1” if the lead didn’t attend the event, or “0” if the lead did attend the event. Onstream populates after the event completes
- **Example Values** – “1” or “0”

onsmRegistered

- **Description** – Onstream will set this field to “1” if the lead is registered. Populates after the lead is registered to an event.
- **Example Values** – “1” or “0”

sessionURL:

- **Description** – Onstream will set this field with the url to the event after the lead registers.
- **Example Values** –

updatedAt:

- **Description** – Standard Marketo Custom Object field, is automatically updated by Marketo after updating the Marketo Custom Object
- **Example Values** – “2016/02/18 T01:30 EST”