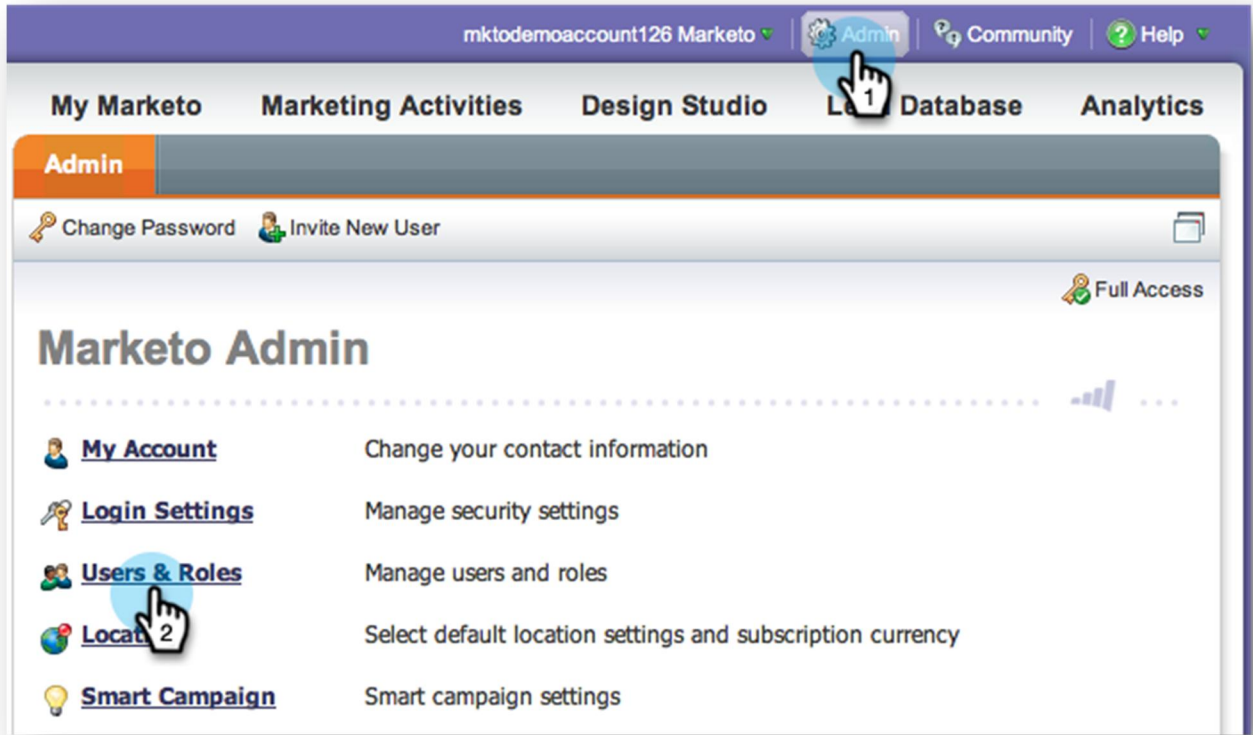
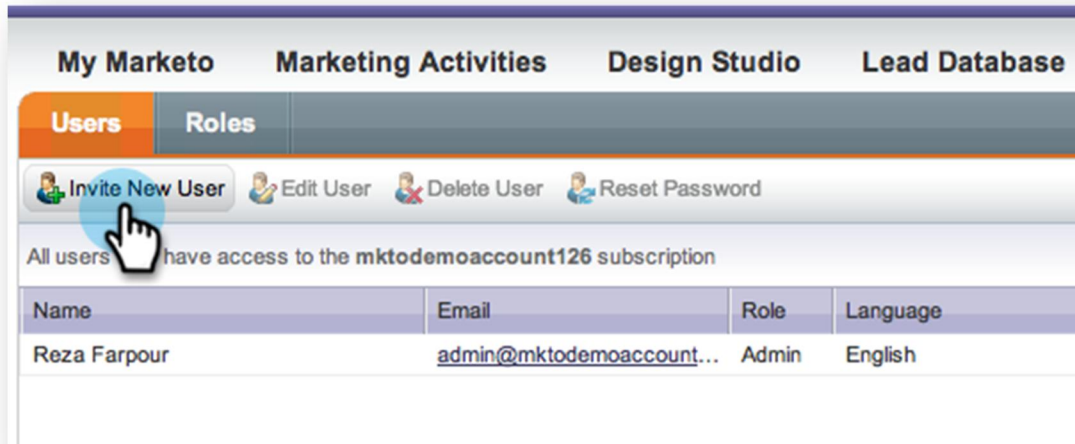


Step 2: Create New User

- 1) Go to the Admin area and click on Users & Roles.



- 2) Click on Invite New User.



- a) Enter First Name: atEvent, Last Name: User, Email/Login: (Internal or provided by atEvent), Role: Admin, and click Invite.

Invite New User

First Name: * tEvent

Last Name: * User

Email/Login: * test@at-event.com

Roles: *

- Admin
- Analytics User
- Marketing User
- Standard User
- Web Designer

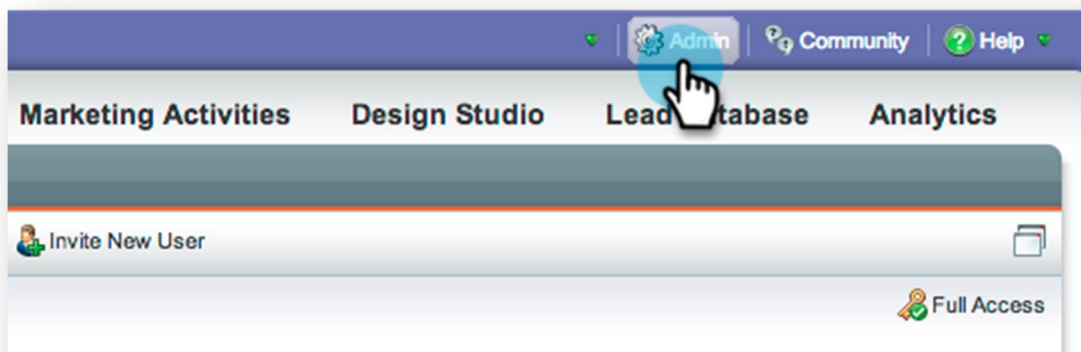
Invitation:

{{FirstName}} {{LastName}},
Welcome to Marketo! Click this link to set your password and begin.
{{LoginToMarketoLink}}
Not sure where to start? Visit <a

Invite Cancel

Step 3: Create Custom Fields in Marketo (Note: If you want the fields to be kept in sync with your CRM, create them in the CRM and they will automatically be created in Marketo.)

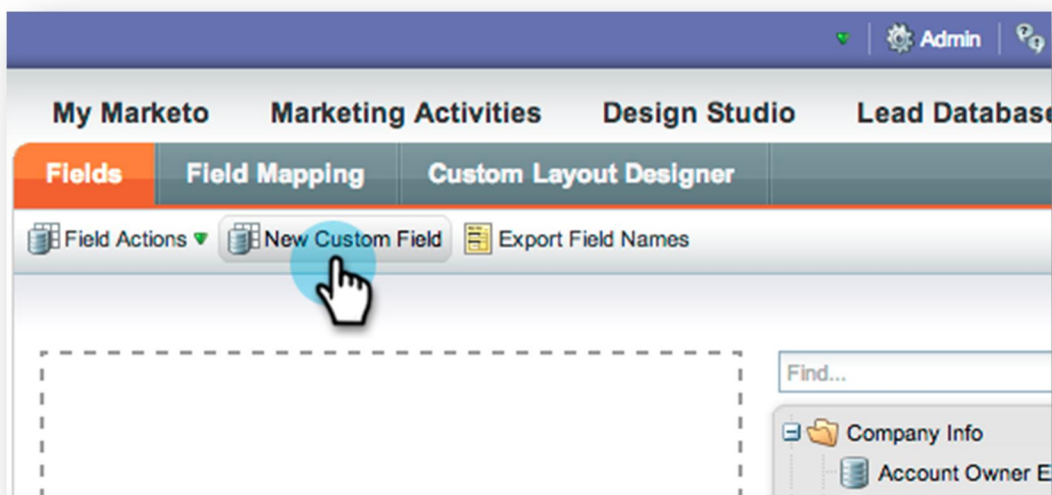
1. Go to Field Management



2. Click Field Management



3) Click the New Custom Field button.



- 4) Add the following custom fields
(API Names are CASE SENSITIVE and cannot be modified after creation)

The screenshot shows a 'New Custom Field' dialog box with the following fields:

- Type:** * Text Area
- Name:** * atEvent Event Name
- API Name:** * ateventeventname

Buttons: + Create, X Cancel

- a) Name: atEvent Event Name
 - i) Type: Text Area
 - ii) Name: atEvent Event Name
 - iii) API Name: ateventeventname
 - b) Name: atEvent Topics and Subtopics
 - i) API Name: ateventtopicsubtopics
 - ii) Type: Text Area
 - c) Name: atEvent Follow Up
 - i) API Name: ateventfollowup
 - ii) Type: Text Area
 - d) Name: atEvent Comments
 - i) API Name: ateventcomments
 - ii) Type: Text Area
 - e) Name: atEvent Presenter
 - i) API Name: ateventpresenter
 - ii) Type: Text Area
- 5) Click Check

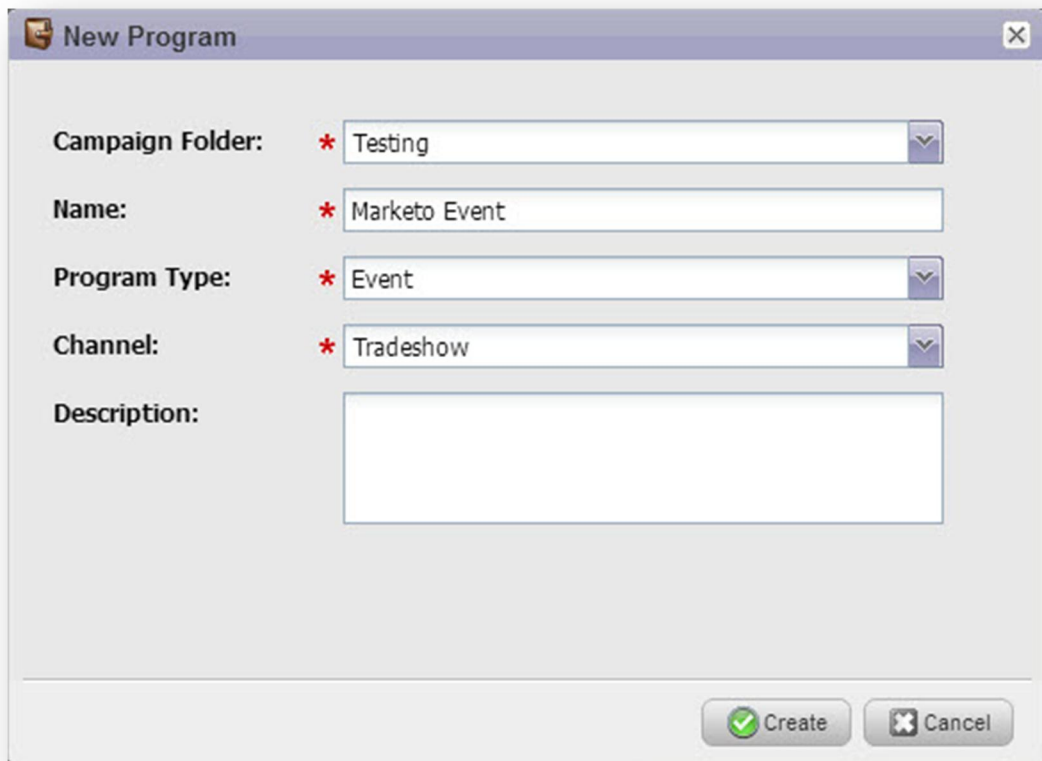
Marketing Activities (This is an EXAMPLE at Event Event/Campaign – Cases will vary)

Step 4: Create New Event

- 1) Click New and select New Program. The New Program dialog box displays.



- 2) Select a Campaign folder for the Program.
- 3) Enter a name for the Event (If event is recurring, we suggest including date)
- 4) Choose the Program Type – Event.
- 5) Select a Channel – Tradeshow.

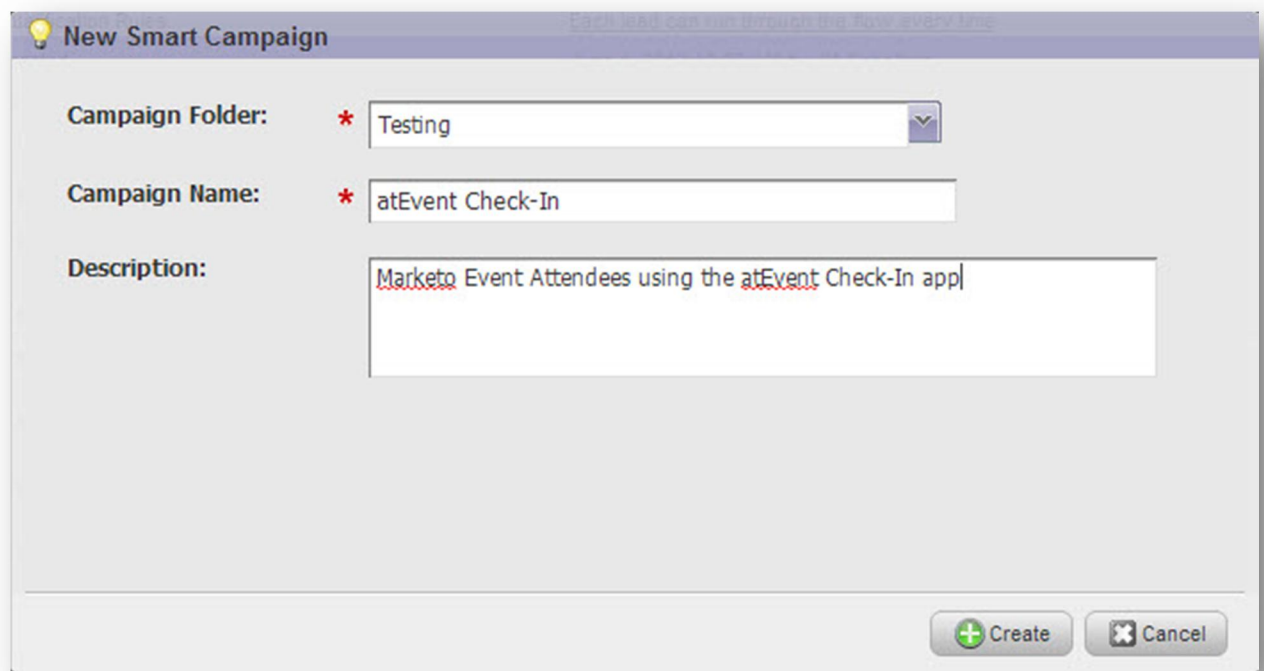
A screenshot of the 'New Program' dialog box. The dialog box has a title bar with a close button. It contains five fields, each with a red asterisk indicating it is required: 'Campaign Folder' with a dropdown menu showing 'Testing'; 'Name' with a text input field containing 'Marketo Event'; 'Program Type' with a dropdown menu showing 'Event'; 'Channel' with a dropdown menu showing 'Tradeshow'; and 'Description' with a large empty text area. At the bottom right, there are two buttons: 'Create' with a green checkmark icon and 'Cancel' with a grey X icon.

Step 2: Create Smart Campaign(s)

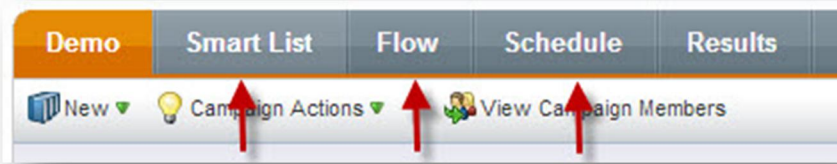
- 1) Create New Smart Campaign under selected Event



- 2) Select a Campaign folder for the Program
 - a) Name: atEvent Check-In (If there are multiple Company Groups, append Group Name)

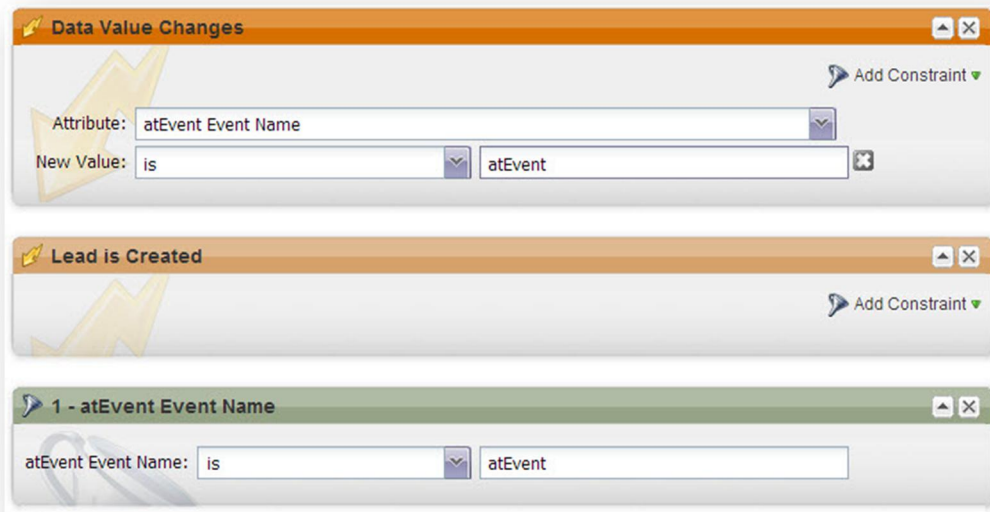
A screenshot of a 'New Smart Campaign' dialog box. The dialog has a title bar with a lightbulb icon and the text 'New Smart Campaign'. It contains three fields: 'Campaign Folder:' with a dropdown menu showing 'Testing' and a red asterisk; 'Campaign Name:' with a text input field containing 'atEvent Check-In' and a red asterisk; and 'Description:' with a text area containing 'Marketo Event Attendees using the atEvent Check-In app'. At the bottom right, there are two buttons: '+ Create' and 'X Cancel'.

- 3) After creating a Smart Campaign, the following tabs have to be updated.



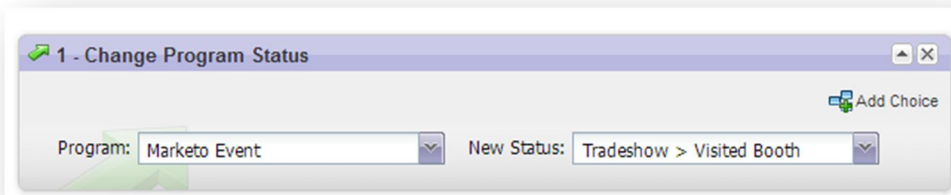
4) Smart List

- a) Data Value Changes
 - i) Attribute: atEvent Event Name
 - ii) New Value: is
 - iii) Value: (Your event name)
- b) Lead is Created



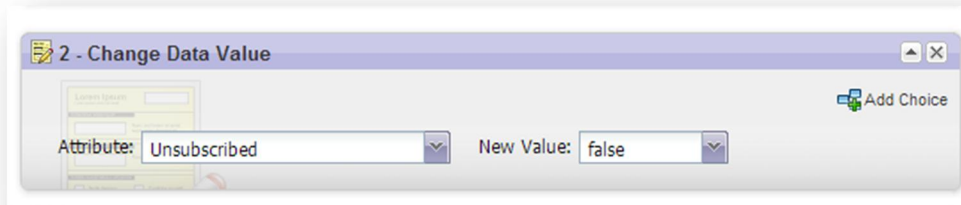
5) Flow

- a) Change Program Status
 - i) Program: (Select Event you created)
 - ii) New Status: Visited Booth (Select Appropriate Status)



- b) Change Data Value
 - i) Attribute: Unsubscribed

ii) New Value: false



c) Send Email (This logic will send emails to attendee only once)

i) Check on the Add Choice button on the top right of window

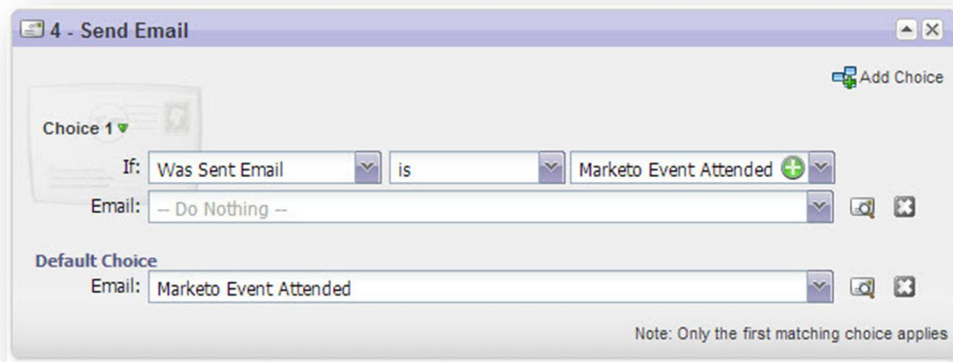
ii) Choice 1

(1) If: Was Sent Email is (Select Appropriate Email for Attendees)

(2) Email: -- Do Nothing --

iii) Default Choice

(1) Email: Default Choice – (Select Appropriate Email for Attendees)



5. Scheduling

1. Qualification Rules: (Your choice)

2. Activate

Step 3: Pass authentication, event name, and additional instructions as needed to At-Event.

Step 4: Test, Test, Test

Scenario

- Event is created in Marketo with the necessary leads associated
- At Event
 - Known guest arrives at event
 - Update Event with status Value of “Visited Booth”
 - Unknown guest arrives at event
 - Create lead
 - Add to Event with status Value of “Visited Booth”