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Installation Requirements

To install *FormComplete for Marketo* you need a ZoomInfo account with API access enabled, a ZoomInfo account with API access enabled, and a ZoomInfo account with API access enabled.

with these tasks, you can find online Marketo documentation for custom field creation [here](#) and for webhook creation [here](#).

Product Overview

FormComplete for Marketo extends and enriches the information you gather using Marketo forms. The extension validates and appends information to your contact records, including phone numbers, email addresses, and companies.

Access to detailed contact and business information is the key to achieving the best results from your marketing campaigns. However,



requiring visitors to fill in numerous form fields leads to higher bounce rates, inaccurate field submissions, and lower conversion rates. With FormComplete you can:

< **Increase conversion rates**

Reduce the number of form fields and increase the likeliness that visitors will provide you with their information, resulting in more submissions and field accuracy. Get the information you need for your campaigns directly into your marketing automation instance without having to ask for it from your prospects.

< **Improve targeting and segmentation**

Duplicate the successes of past campaigns with access to demographic and firmographic information on your leads. Fill in the blanks

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< **Enhance the accuracy of your database**

Eliminate bad data from entering your database b ^ Á ^ } • ~ ! ã } * Á c @^ Á ã } ~ [! { æc ã [} Á ^ [~ q ! ^ Á & æ] c ~ ! ã } * Á ~ ! [

Cleanse and fill in the blanks with important demographic and firmographic information, helping enrich the information flowing into your CRM and to your sales team.

< **Maintain a consistent CRM**

Use the normalization features to ensure all of the information flowing into your CRM is in the format you need, making sure the lead is sent to the right campaign or territory sales rep.



Installation and Configuration

To install *FormComplete for Marketo* [] ^ | | ^ Ê Á ^ [~ q | | Á } ^ ^ á Á & ! ^ á ^ } c ã æ | • Á æ } á Á æ á { ã } Á] ^ | { ã • • ã

FormComplete for Marketo extends and enriches the information you gather using Marketo forms. The extension validates and appends information à [~ c Á ç ã • ã c [! • Á , @[Á ~ ã | | Á [~ c Á æ Á T æ ! \ ^ c [Á à æ • ^ á Á ~ [! { Á , ã c @Á ã } ~ [! { æ c ã] and companies.

Follow these steps to enable this capability:

- < Create/define additional custom fields in your Marketo application. V @ ^ • ^ Á ~ ã ^ | á • Á , ã | | Á à ^ Á] [] ~ | æ c ^ á Á ç ã æ Á c designate as the source for your *FormComplete* extension in the second step (below). Choose and create fields for the specific information you want to add to each form submission.
- < Create/configure a web-à æ • ^ á Á & [} } ^ & c ã [} Ê Á & æ | | ^ á Á æ Á , ^ à @[[\ Ê Á , @ã & @Á ! ^ c ! ã ^ ç ^ • Á c @ ^ (above). The webhook contains ZoomInfo API information, informing Marketo on where and how to access the ZoomInfo database. This task incorpo! æ c ^ • Á c , [Á • c ^] • Á à ^ | [, Ê Á & ! ^ æ c ã } * Á c @ ^ Á , ^ à @[[\ Á æ] á Á { æ]] ã } * Á , ^
- < Š æ • c | ^ Ê Á & [} ~ ã * ~ | ^ Á æ Á ± c ! ã * * ^ ! q Á , @ã & @Á æ & c ã ç æ c ^ • Á c @ ^ Á , ^ à @[[\ Á & [} } ^ & c ã Ò æ {] æ ã * } È + Á Q [*] Á c ã @ ã • Á c ! ã * * ^ ! Á æ ~ * { ^ } c • Á c @ ^ Á ~ [! { Á • ~ à { ã • • ã [} Á • c ^] Á à ^ Á ã]

When these steps are finished, your installation is complete. Now, when a user submits a Marketo form, as part of a Smart Campaign *FormComplete* will activate your webhook, validate data submitted by the user on the form, and retrieve additional information æ à [~ c Á c @ ^ Á ~ • ^ ! Á ~ ! [{ Á c @ ^ Á Z [[{ Q } ~ [Á á æ c æ à æ • ^ Ê Á W • ^ ! • Á æ ! ^ Á • æ t p a a r i e r , @ ^ Á c ã { ^ Á [more complete user profile.

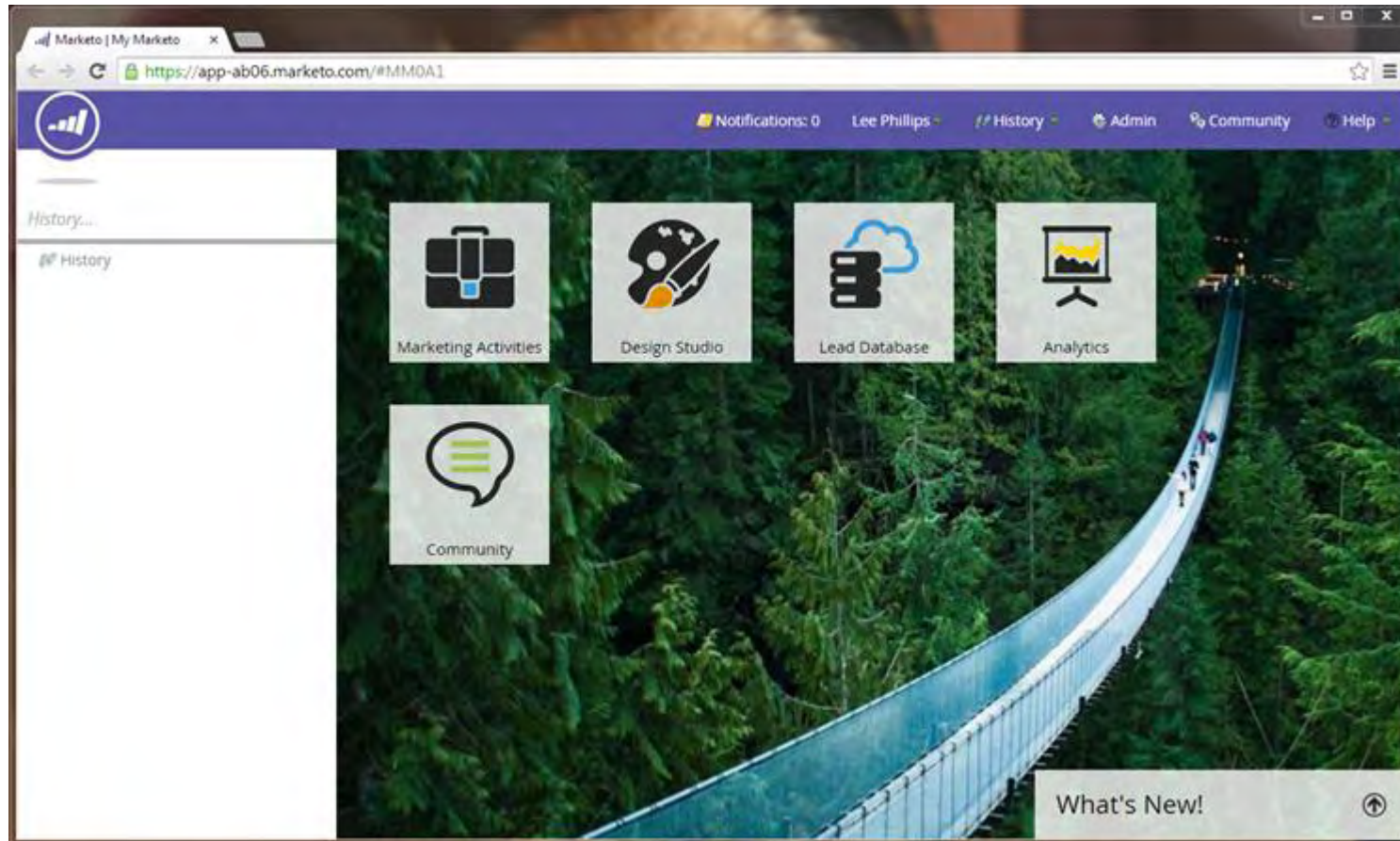
Create Marketo Fields to Contain Appended ZoomInfo Information

Ø ã ! • c Á ^ [~ q | | Á } ^ ^ á Á c [Á & ! ^ æ c ^ Á } ^ , Ê Á & ~ • c [{ Á ~ ã ^ | á • Á ã } Á ^ [~ ! d Á About people [Á ã } • c æ } who submit forms in a Ma! \ ^ c [Á Û { æ ! c Á Ô æ {] æ ã * } È Á Q ~ Á ^ [~ q ! ^ Á ~ • ã } * Á Û æ | ^ • ~ [! & ^ È & [{ Ê Á ^ [~ first. Doing so will automatically create the fields in your Marketo database.

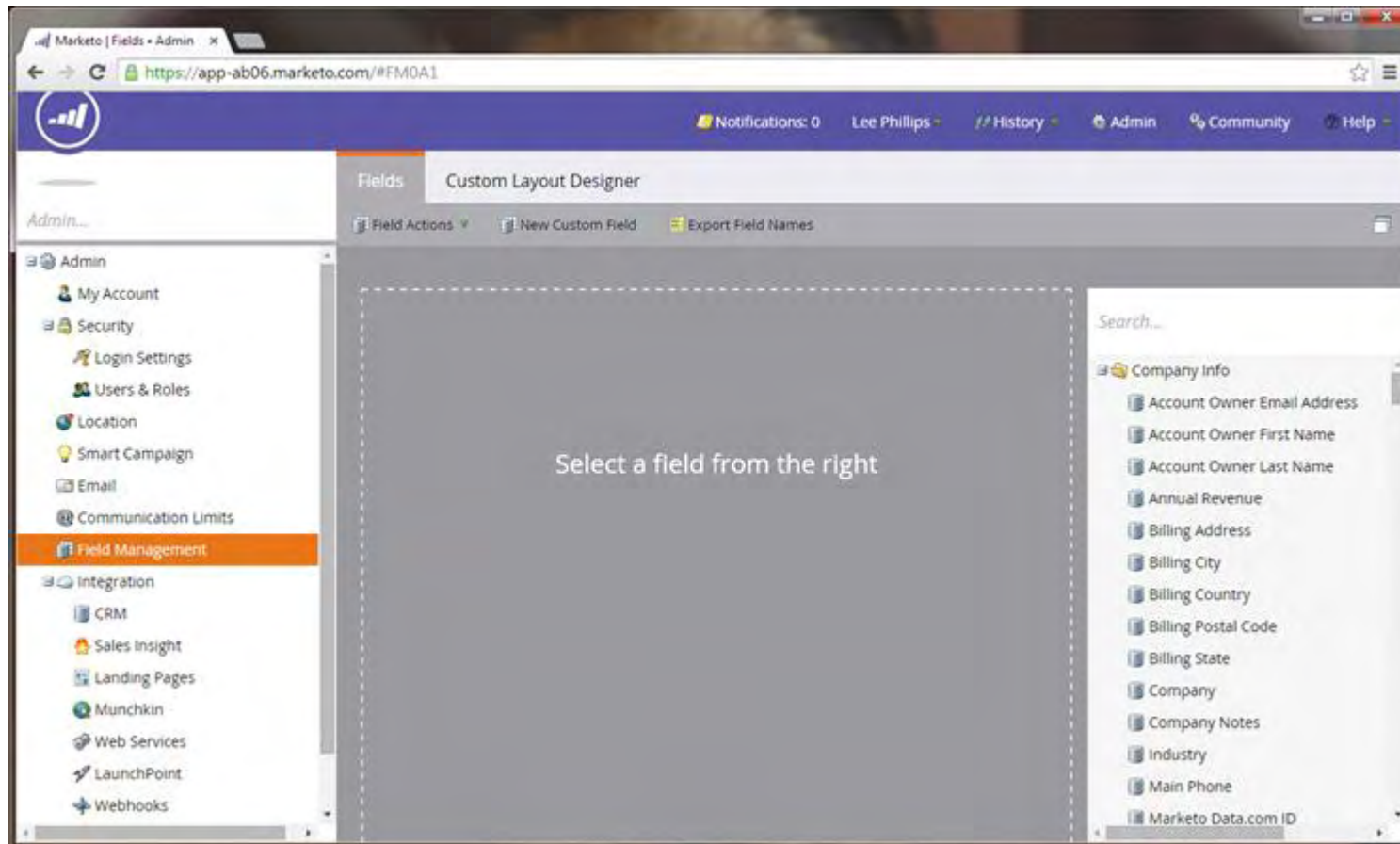
Step One: Create a Custom Field

Your Marketo instance has a collection of pre-defined variables for storing information about your marketing activities. To add information using FormComplete, you must create new, custom fields that store information provided by ZoomInfo.

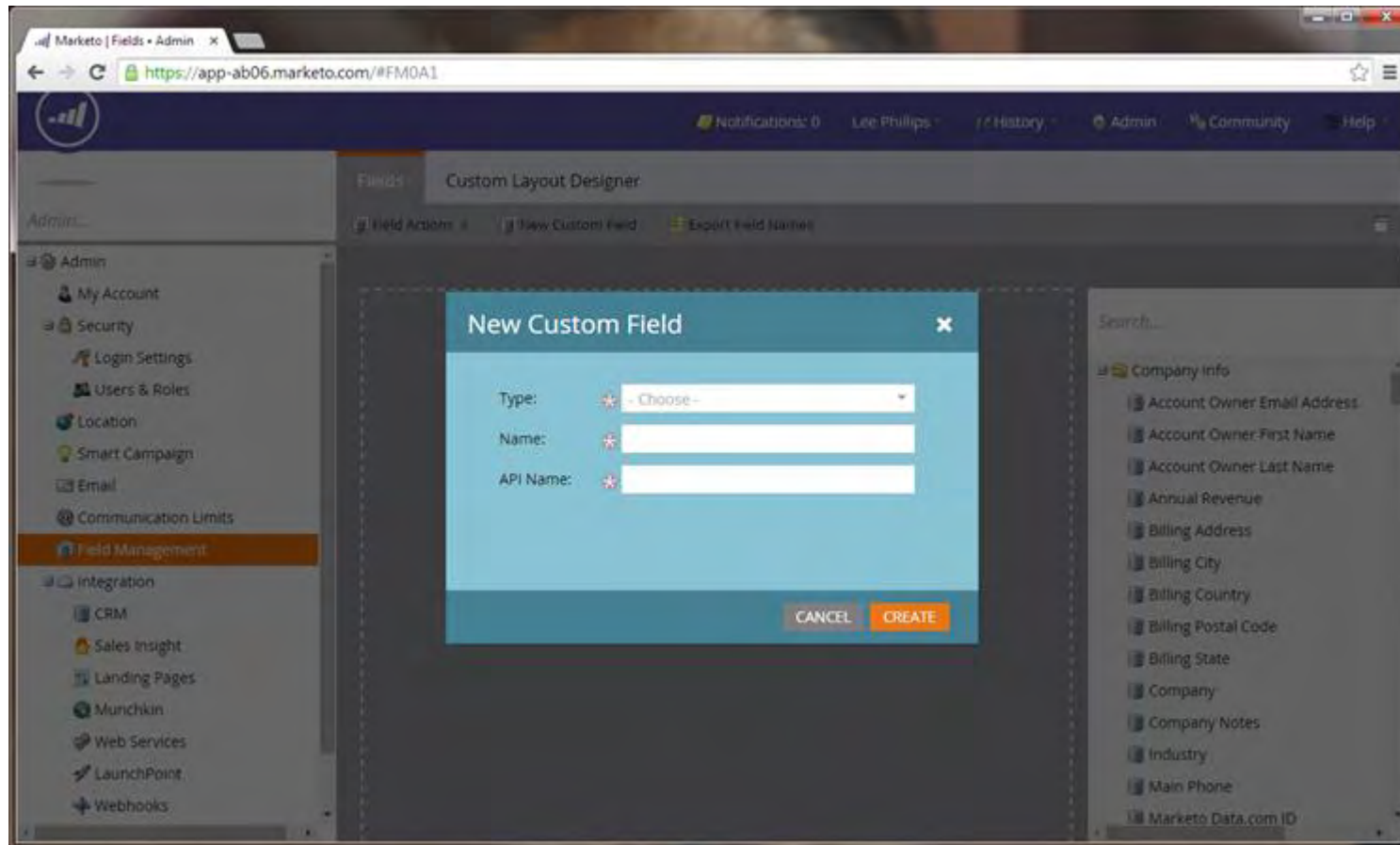
- a. Login to Marketo using credentials with Admin Permissions.



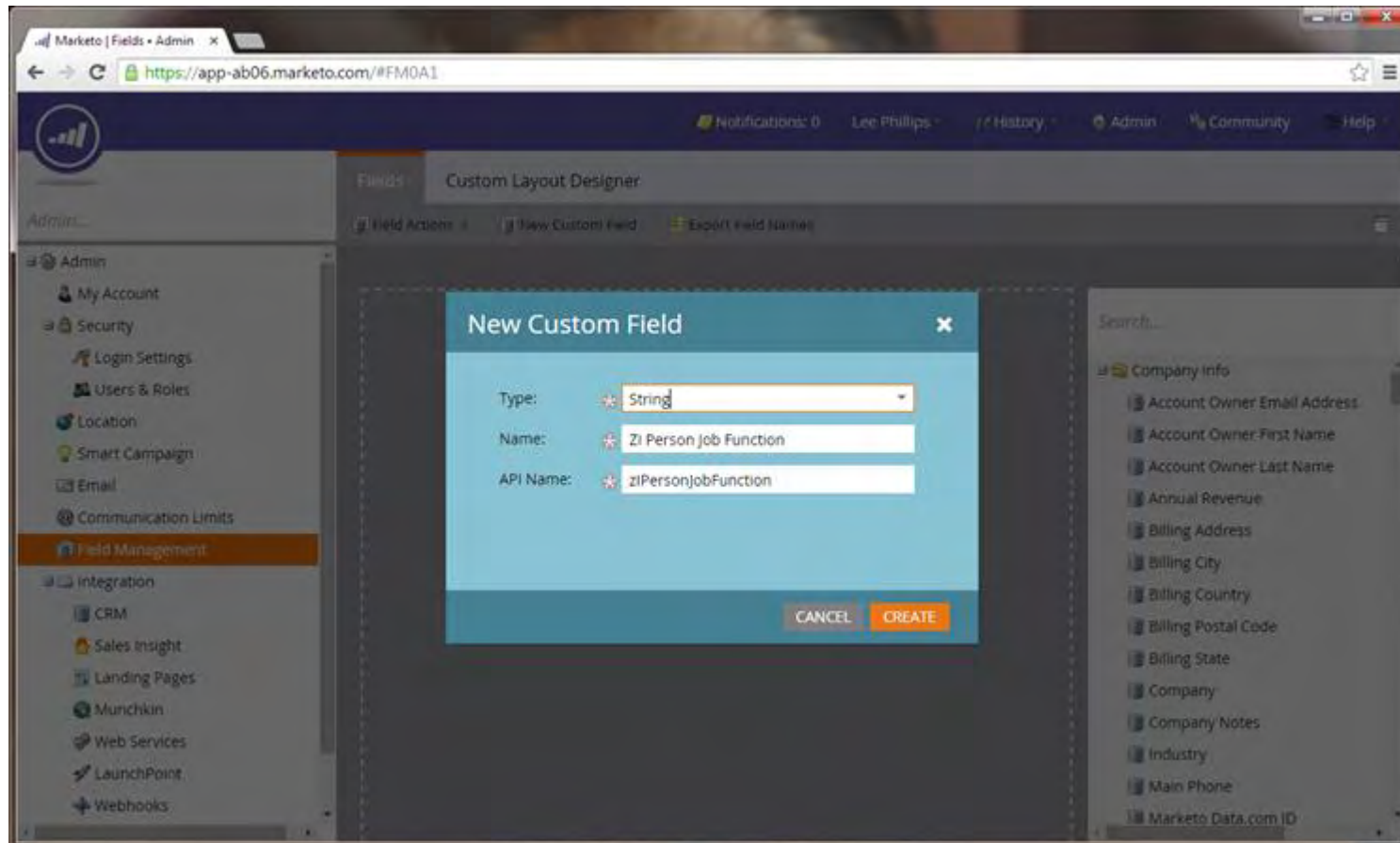
- b. From the main menu, select Admin. From the left navigation panel, select Field Management. From the [Fields](#) tab, select New Custom Field.



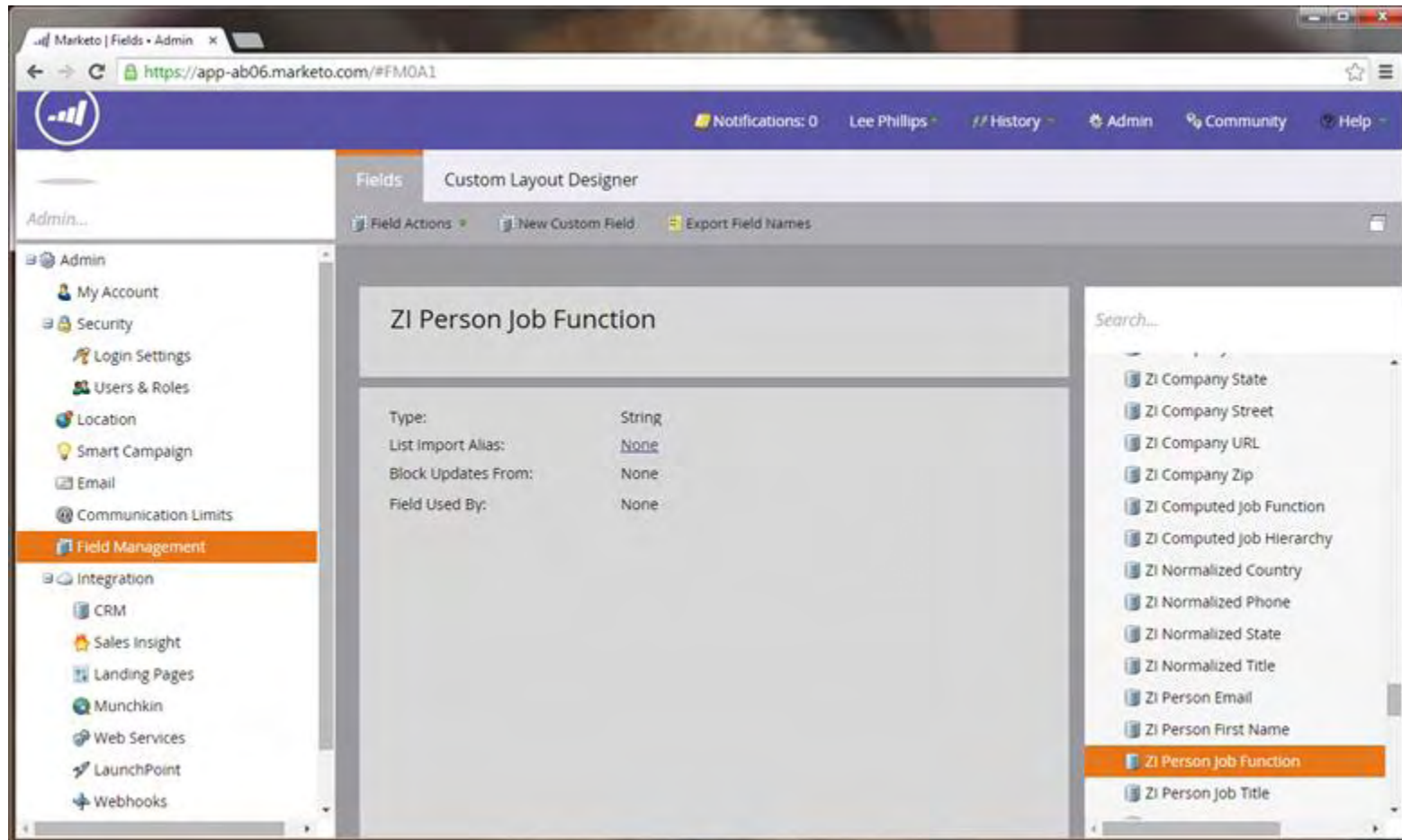
- c. In the New Custom Field pop-up, enter the following information:
- Type:
 - Name:
 - API Name:
- Click the **CREATE** button.



d. Repeat for each custom field you want to populate using *FormComplete*.



- e. As you create new fields, they will be added to the searchable fields list in the right panel.



You may add as many, or as few, fields as you wish. Each field may be named whatever you choose, but you **must** use the API Name and Type in the [Fields](#) table for each field you add.

For additional examples on custom field creation, Marketo provides an online example [here](#).



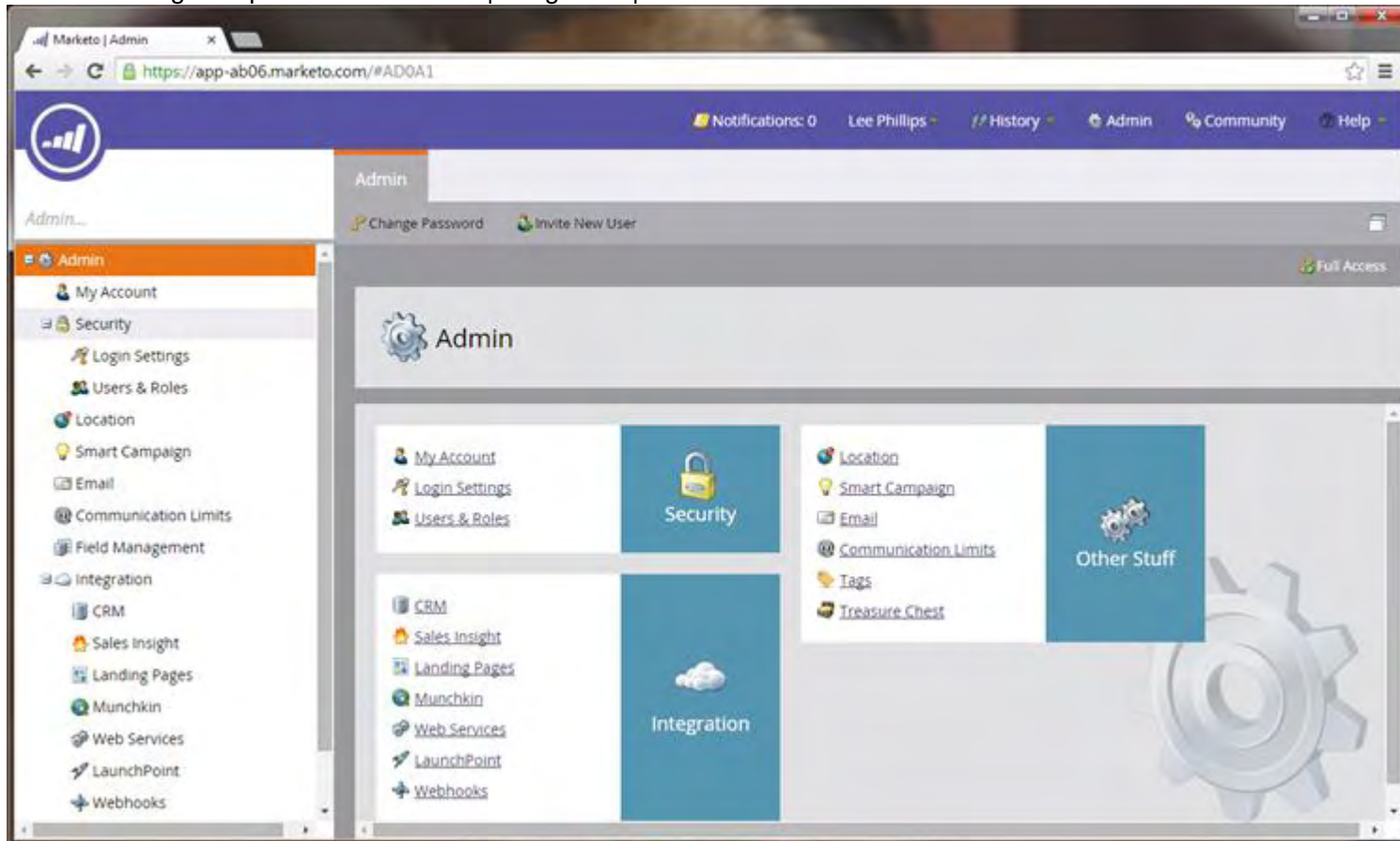
Create a Webhook to Connect Your Marketo Form to ZoomInfo

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Step Two: Create and Configure a Marketo Webhook

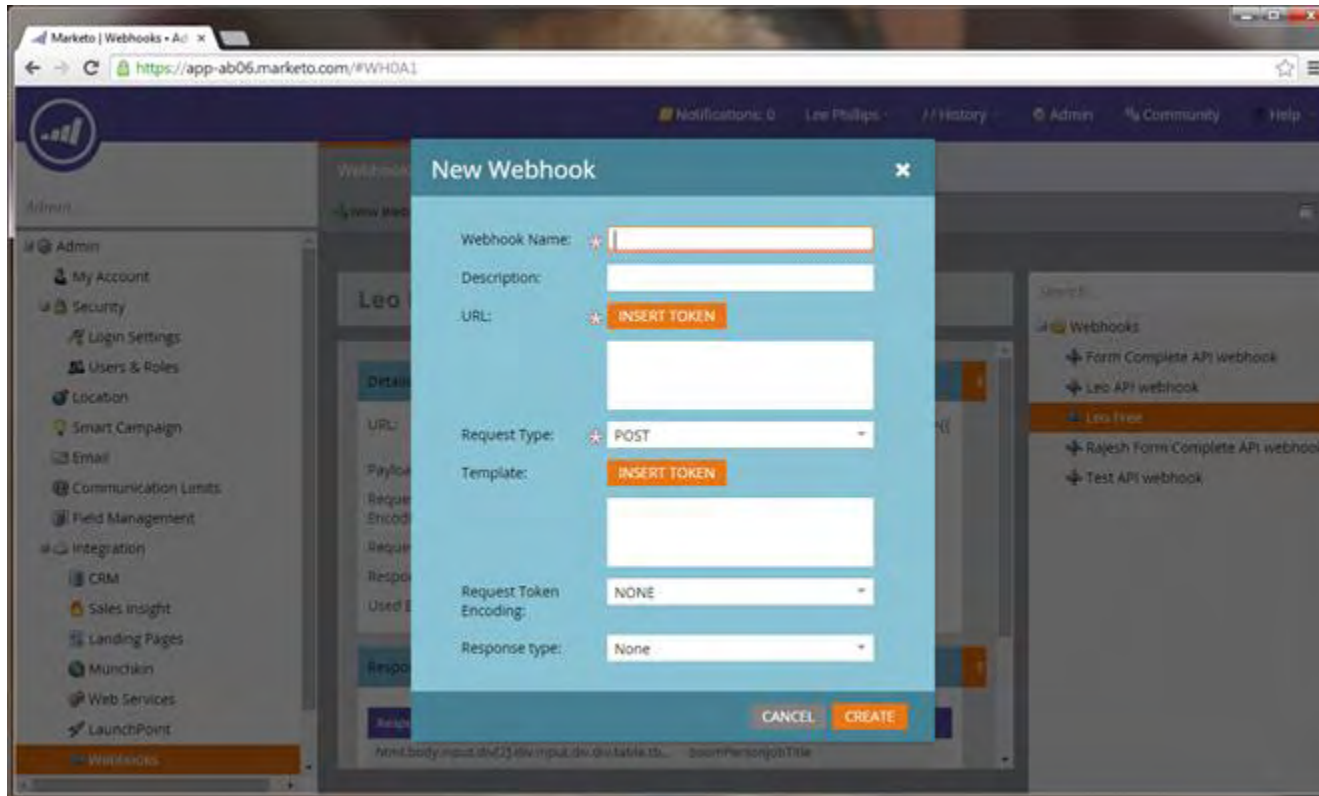
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a. In the left navigation panel select: Admin | Integration | Webhooks



b. From the Webhooks tab, select New Webhook.

- c. In the pop-up, enter a name for your webhook, e.g. FormComplete API. You may add a description if you choose to.

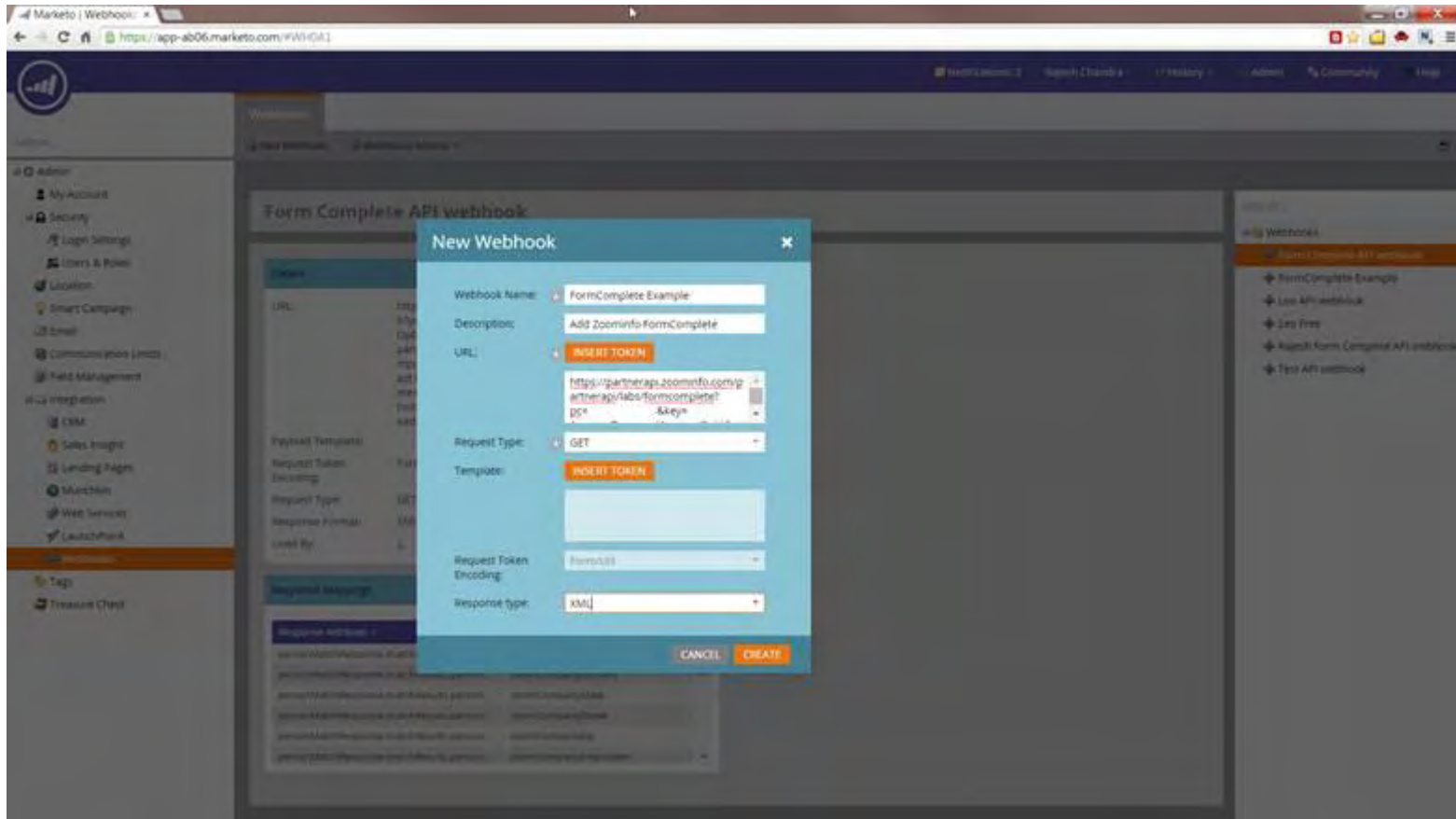


- d. Paste the following text into the URL input field

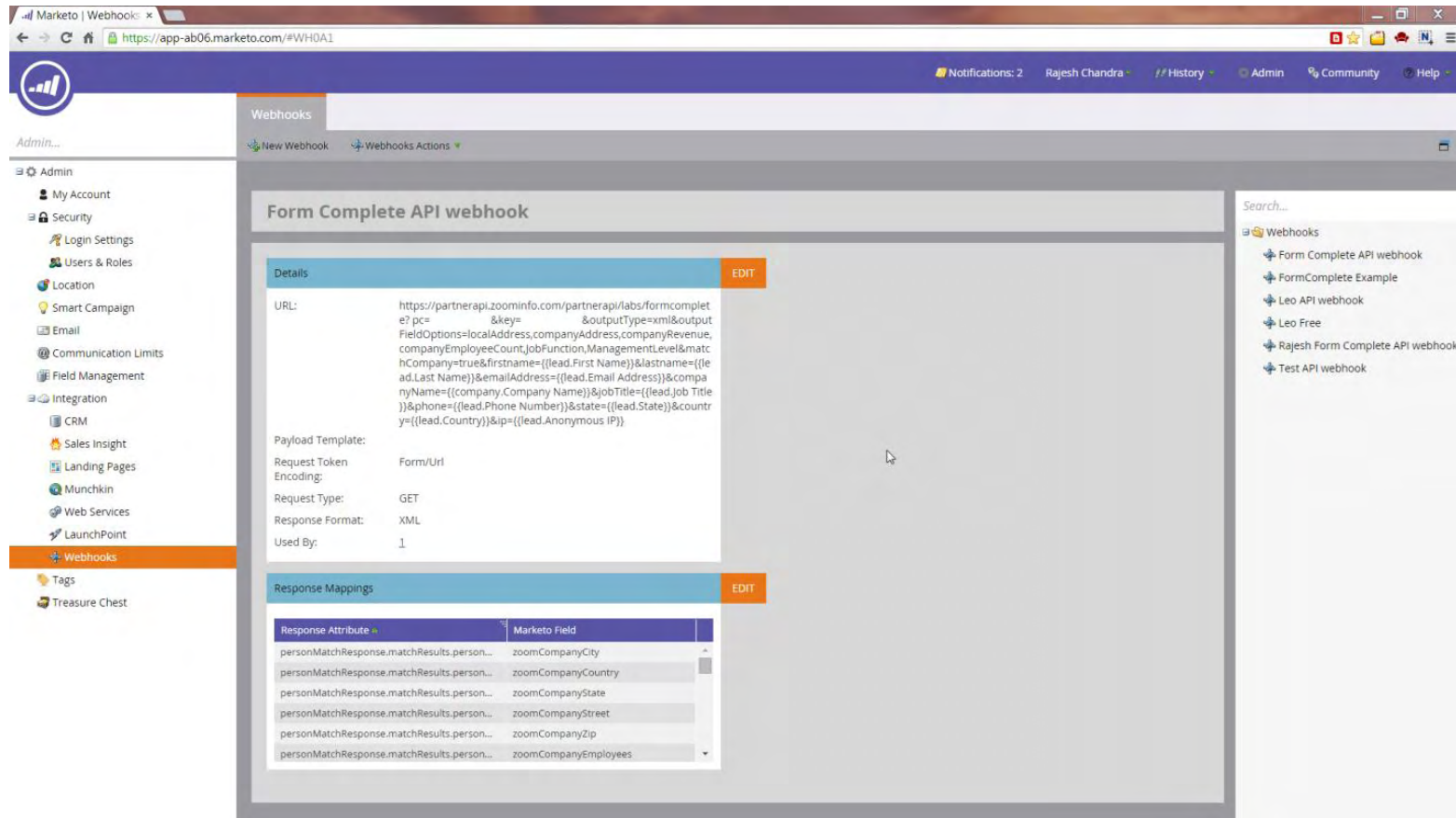
```
https://partnerapi.zoominfo.com/partnerapi/labs/formcomplete?pc=[PartnerCode]&key=[PartnerCode]&outputType=xml&outputFieldOptions=localAddress,companyAddress,companyRevenue,companyRevenueNumeric,companyEmployeeCount,JobFunction,ManagementLevel&matchCompany=true&firstname={{lead.First Name}}&lastname={{lead.Last Name}}&emailAddress={{lead.Email Address}}&companyName={{company.Company Name}}&jobTitle={{lead.Job Title}}&phone={{lead.Phone Number}}&state={{lead.State}}&country={{lead.Country}}&ip={{lead.Anonymous IP}}
```

Replace [PartnerCode] with the partner code value provided by ZoomInfo.

- e. In the Response Ty] ^ Á ~ ã ^ | á Ê Á • ^ | ^ & c Á %Õ Ò V È +
- f. In the Response Format field, Ù ^ | ^ & c Á %Ý T Š È +
- g. Ignore the Insert Token buttons and leave the Template and Request Token Encoding entries empty.



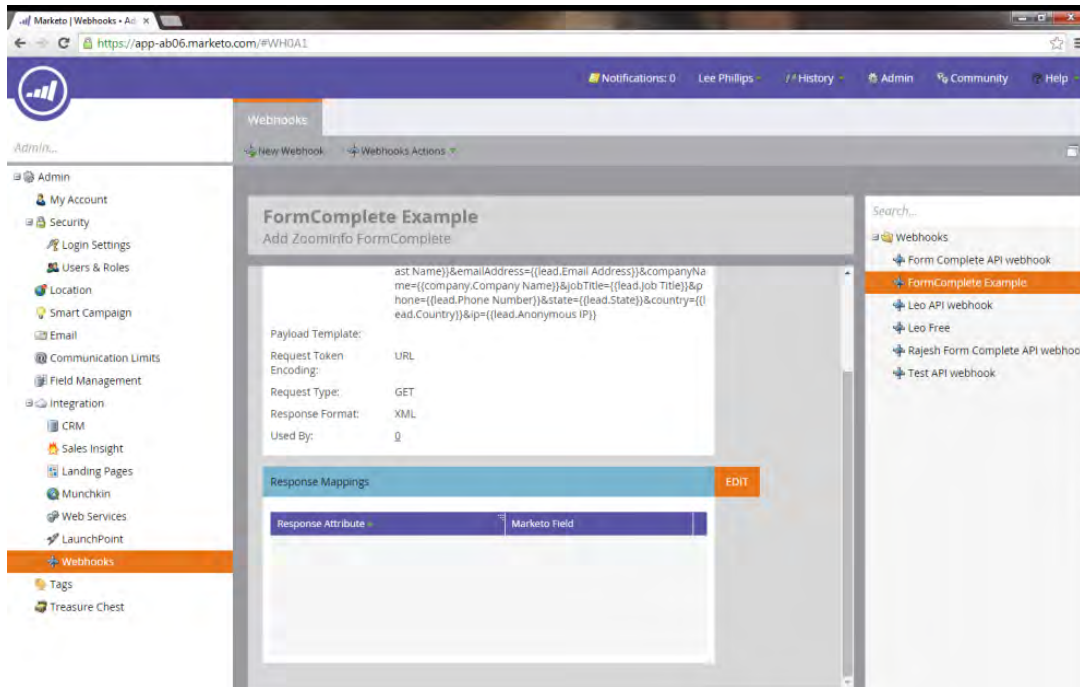
h. Click the Create button. Your newly created webhook will appear in the Webhook panel.



Step Three: Link Custom Fields to Webhook Responses

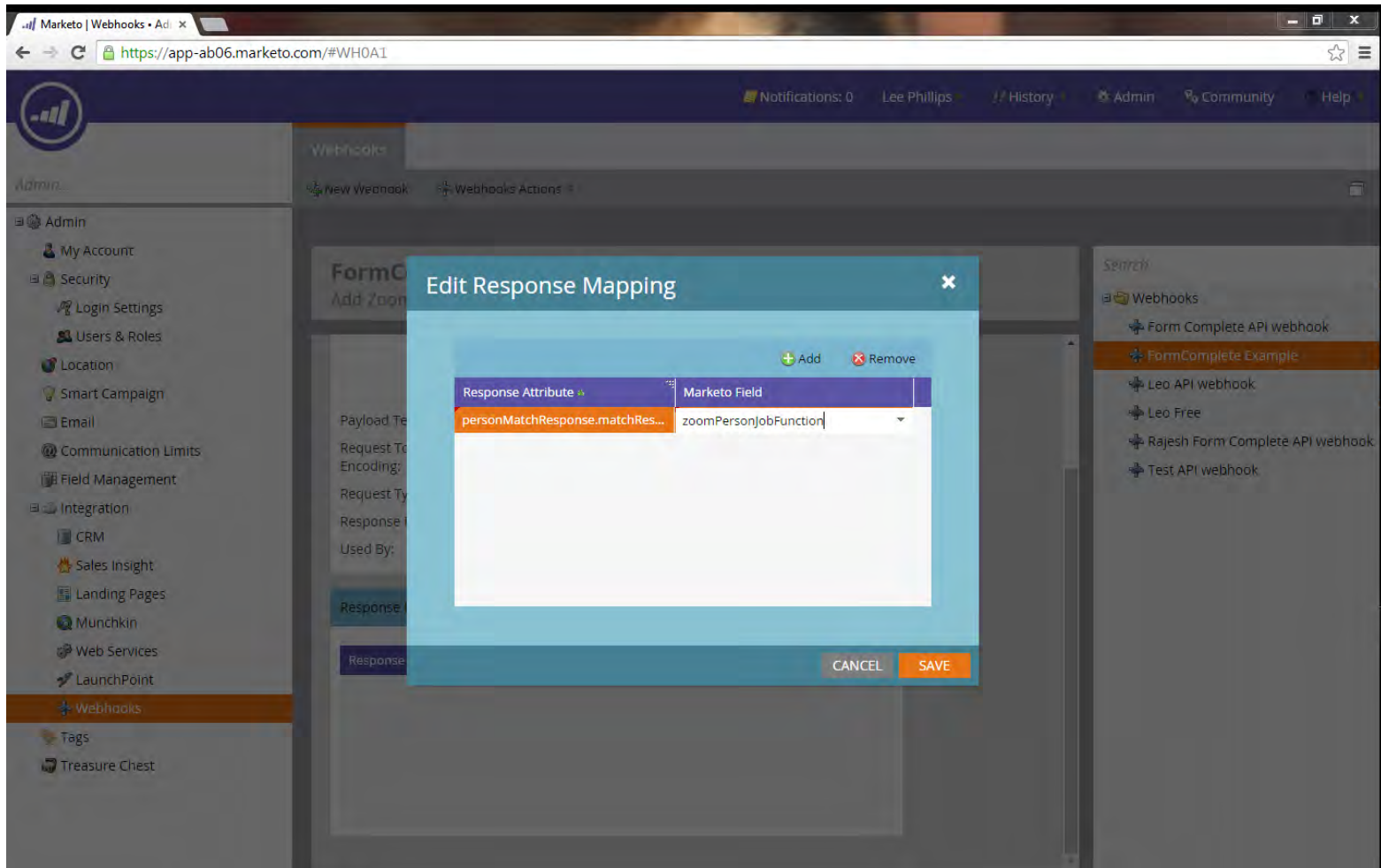
associate the custom fields you specify with the corresponding variables (Response Attributes) in the FormComplete API Webhook.

- i. Scroll down in your webhook window, until you reveal the Response Mappings panel.



- j. Click the orange Edit button. Once you do this, a pop-up window will open, allowing you to Add or Remove settings that link each custom field to the corresponding response provided by the FormComplete API Webhook.
- k. Click Add. This will expose two settings: Response Attribute and Marketo Field.

I. Use the dropdown arrow in the Marketo Field column to select a custom created field you wish to capture using FormComplete.



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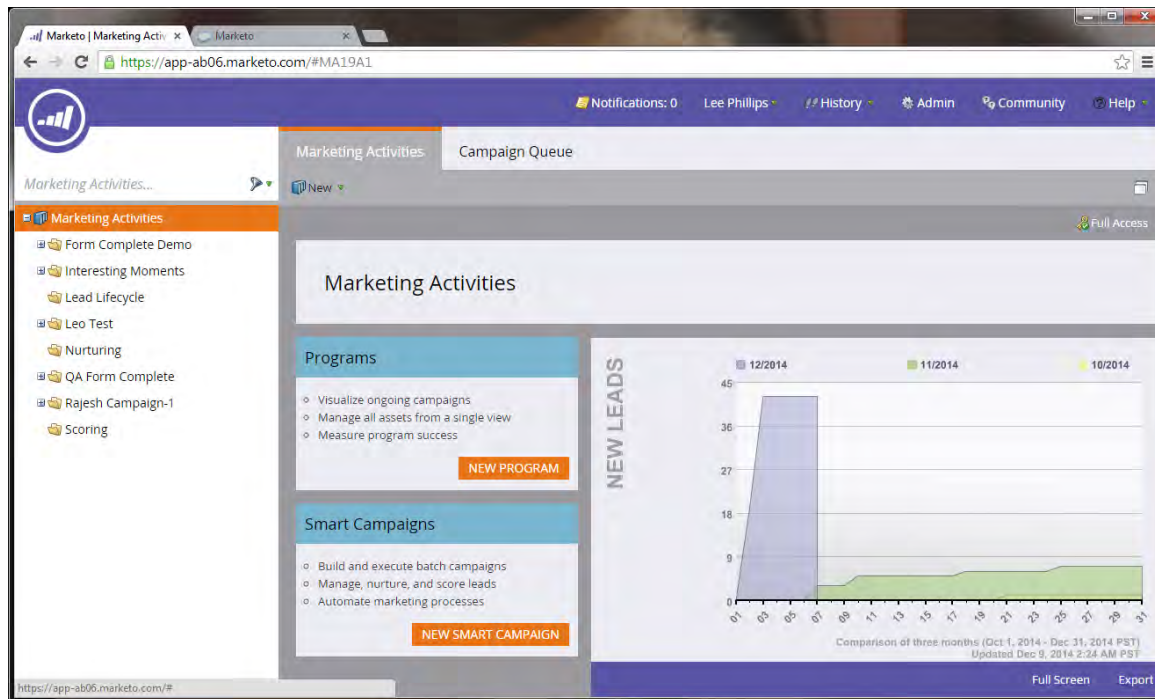
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Add FormComplete to a Marketo Smart Campaign

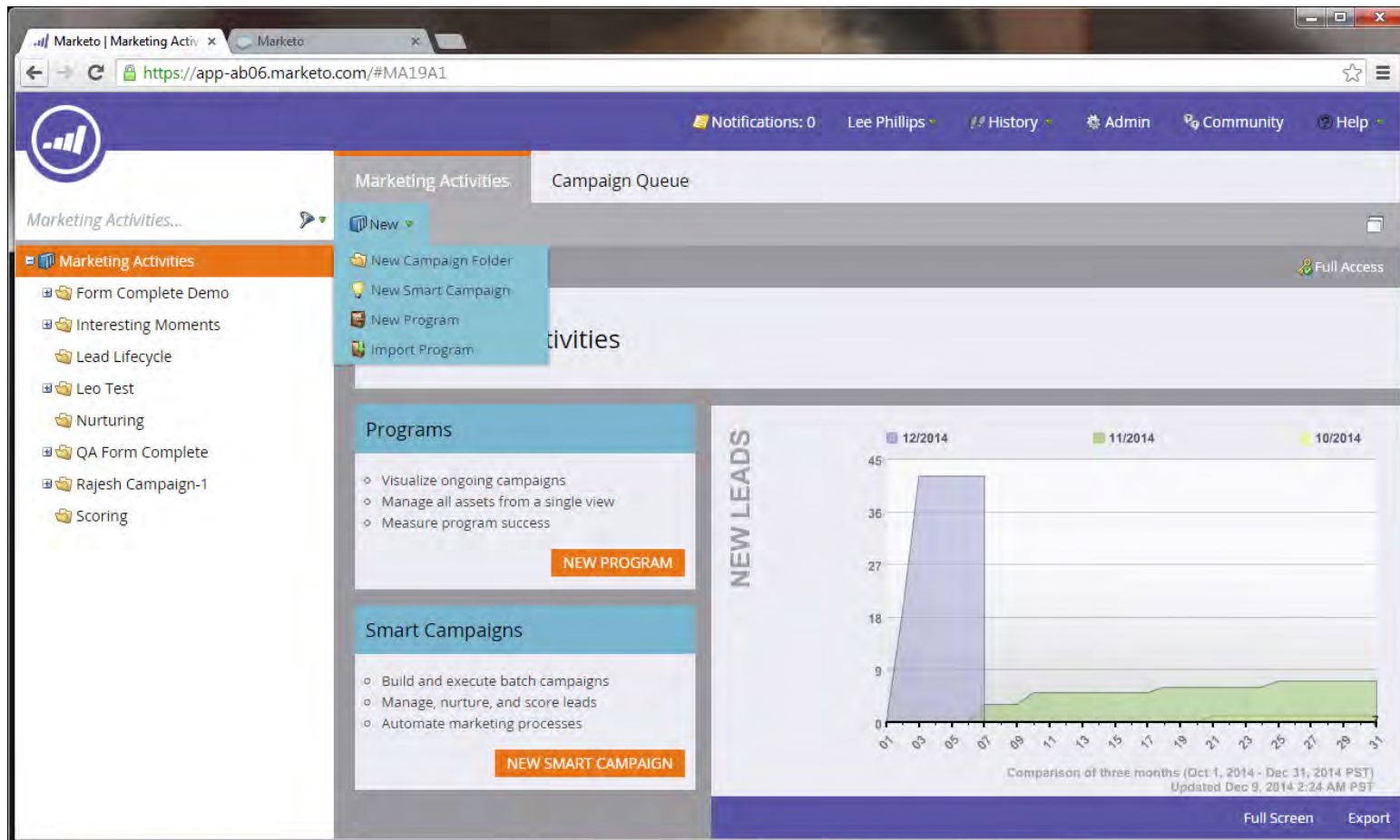
information about the person submitting an associated form.

Step Four: Add FormComplete to a Marketo Smart Campaign

- a. In the left navigation panel, select the Marketing Activities panel.



- b. From the associated Marketing Activities tab, select the new dropdown and pick New Campaign Folder. Provide a name and optional description, then click Create.
- c. Next, from the newly created tab (with the name you just provided for the folder), select the New dropdown and pick New Smart Campaign.

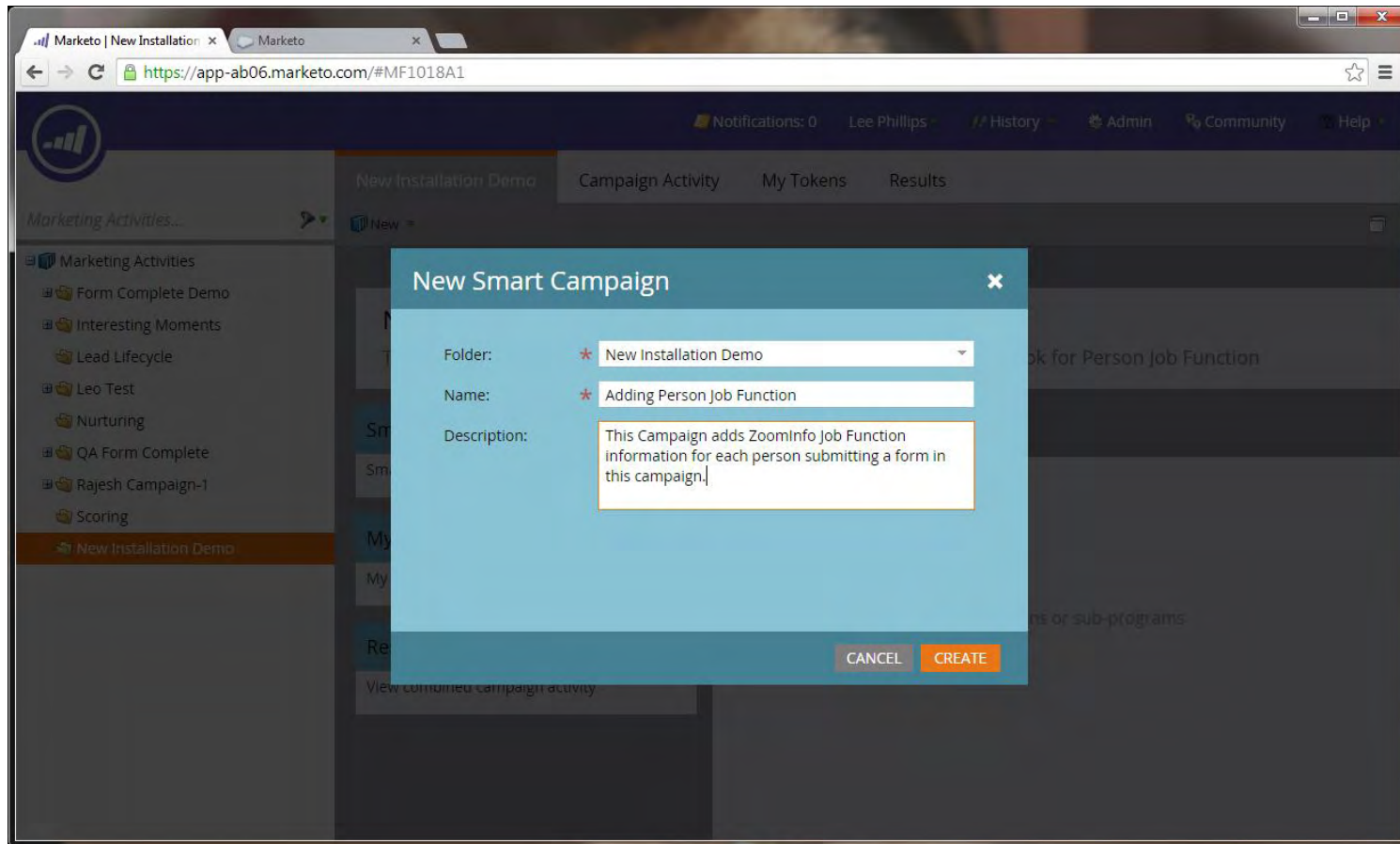


The screenshot shows the Marketo Marketing Activities interface. The browser address bar displays <https://app-ab06.marketo.com/#MA19A1>. The top navigation bar includes "Notifications: 0", "Lee Phillips", "History", "Admin", "Community", and "Help". The main interface is divided into several sections:

- Marketing Activities:** A dropdown menu is open, showing options: "New", "New Campaign Folder", "New Smart Campaign", "New Program", and "Import Program".
- Programs:** A section with a "NEW PROGRAM" button. It lists: "Visualize ongoing campaigns", "Manage all assets from a single view", and "Measure program success".
- Smart Campaigns:** A section with a "NEW SMART CAMPAIGN" button. It lists: "Build and execute batch campaigns", "Manage, nurture, and score leads", and "Automate marketing processes".
- NEW LEADS:** A bar chart comparing leads for three months: 12/2014, 11/2014, and 10/2014. The y-axis ranges from 0 to 45. The 12/2014 bar is significantly higher than the others.

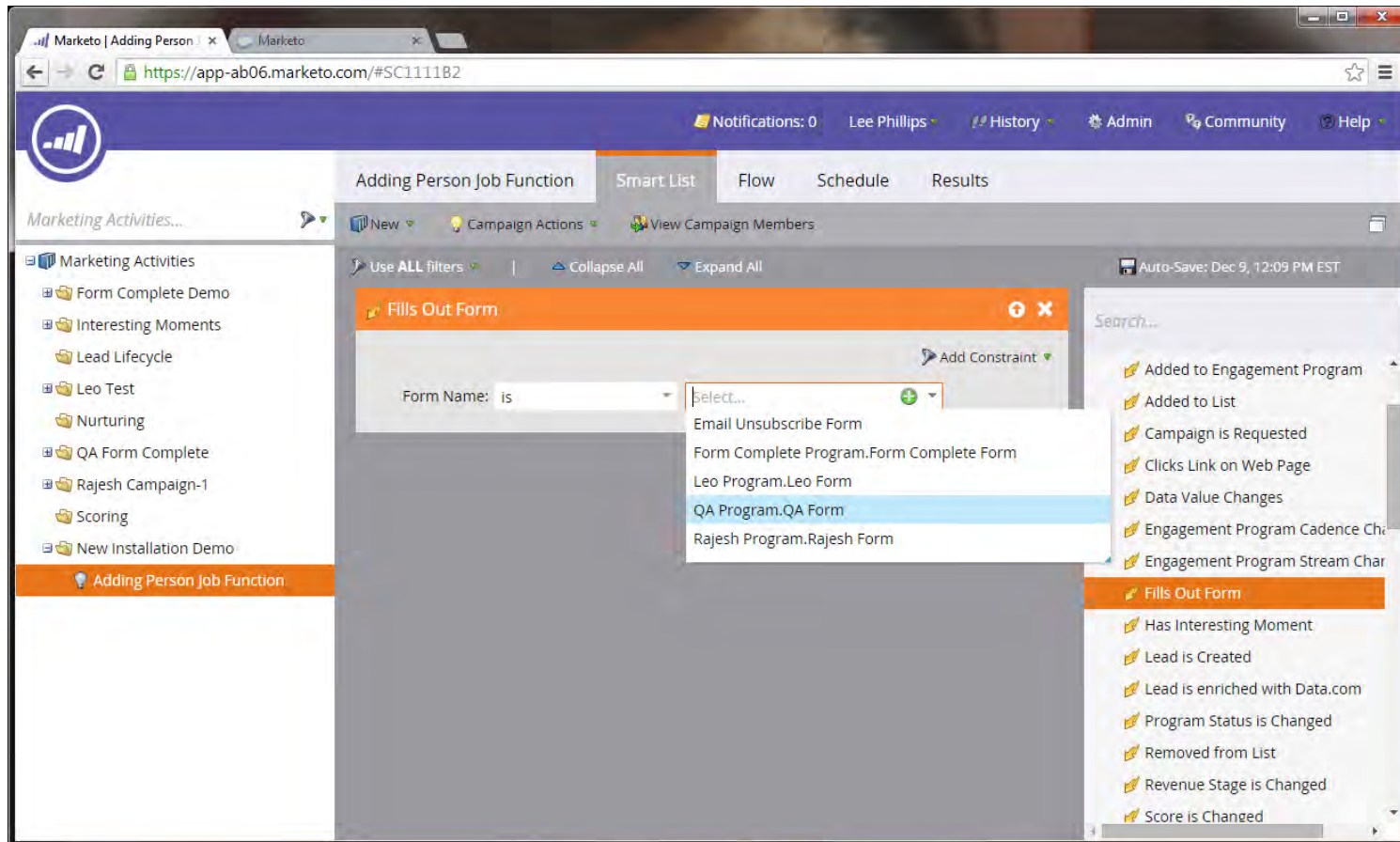
At the bottom right, there are "Full Screen" and "Export" buttons. The chart is titled "Comparison of three months (Oct 1, 2014 - Dec 31, 2014 PST)" and "Updated Dec 9, 2014 2:24 AM PST".

d. In the pop-up window, choose a name for the new campaign (required). You can add an optional description. Click Create.

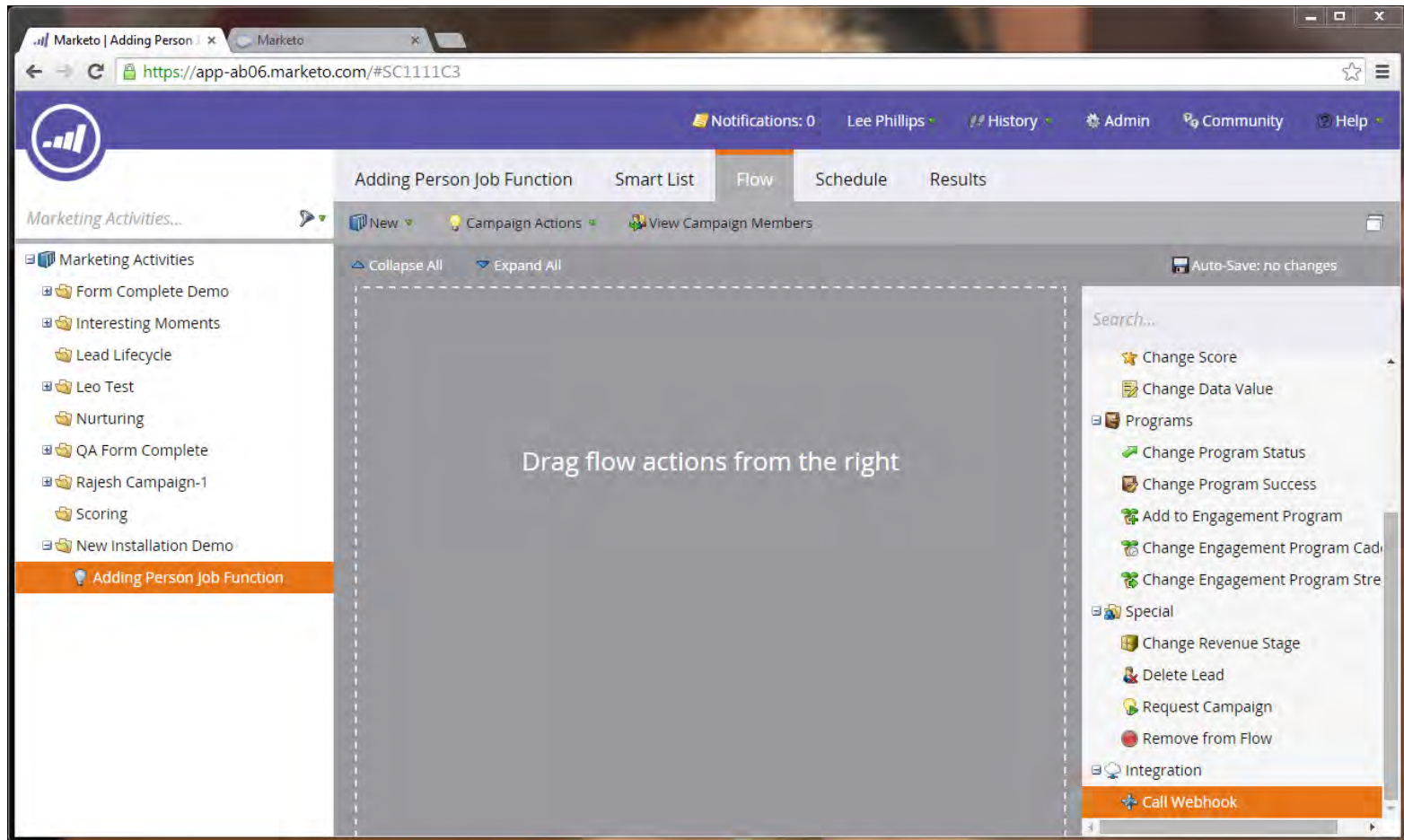


e. Select the Smart List tab adjacent to the named campaign folder tab.

g. Complete the pop-up to select the form into which your FormComplete webhook will be inserted.

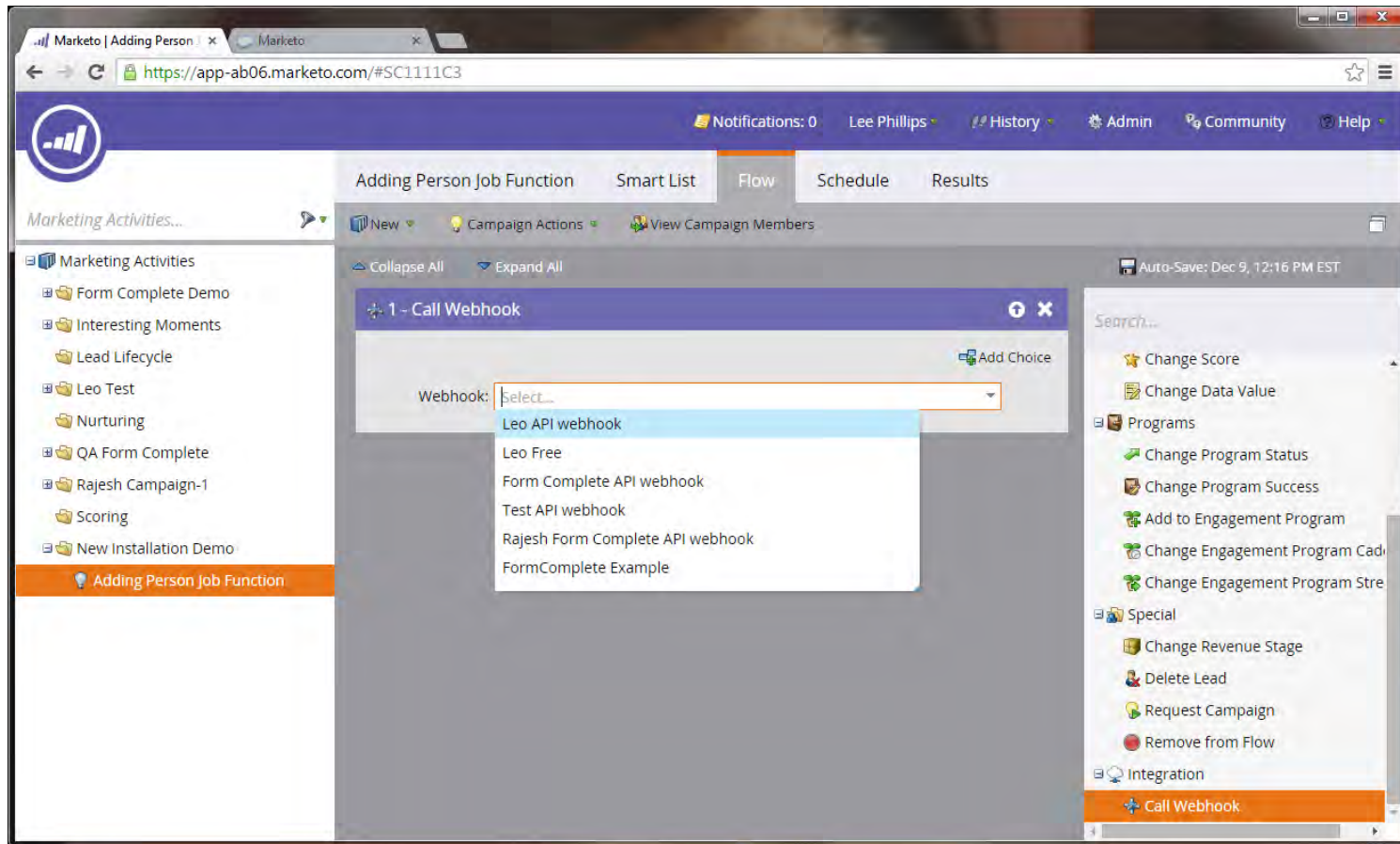


- h. In the center panel of the Flow tab.

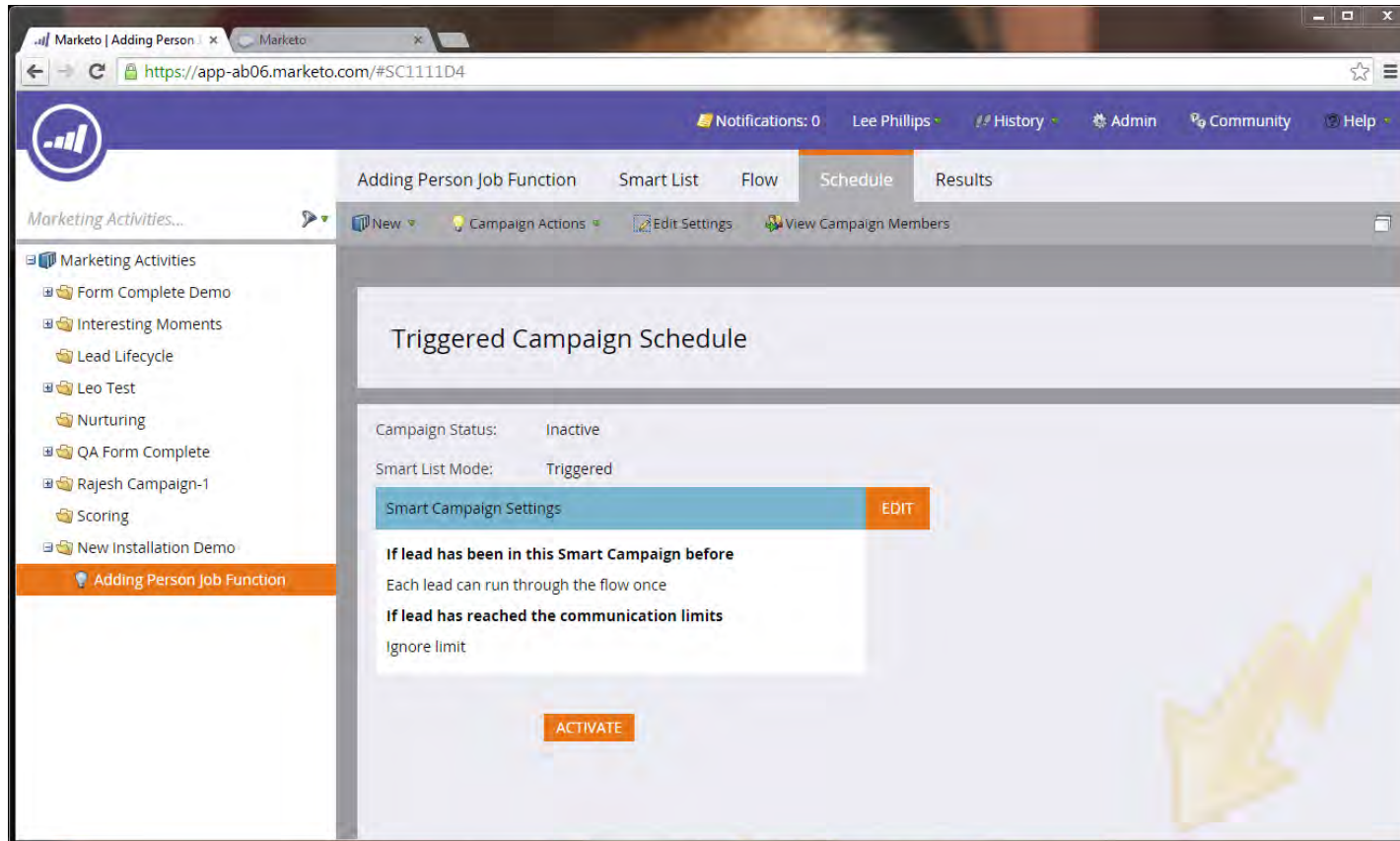


- i. Using the dropdown in the pop-up window, select your configured webhook.

j. Select the webhook you created earlier.



k. From the Schedule tab, you can activate the campaign with FormComplete, by clicking the Activate button.



Installation Complete

Your installation of FormComplete is complete. FormComplete will retrieve the information configured in the webhook from the ZoomInfo database, appending it to the form submission record stored in your Marketo database.



Maintenance and Troubleshooting

Extending, maintaining, or troubleshooting your *ZoomInfo FormComplete for Marketo* application is performed using the native viewing and editing functions associated with custom field creation, webhook definition, and Smart Campaign management.

If you are experiencing any issues, please contact our Client Services team at clientservices@zoominfo.com for assistance.