

Digital Demand Capture Integration Guide

MARKETO INTEGRATION

Integration - Quick Guide

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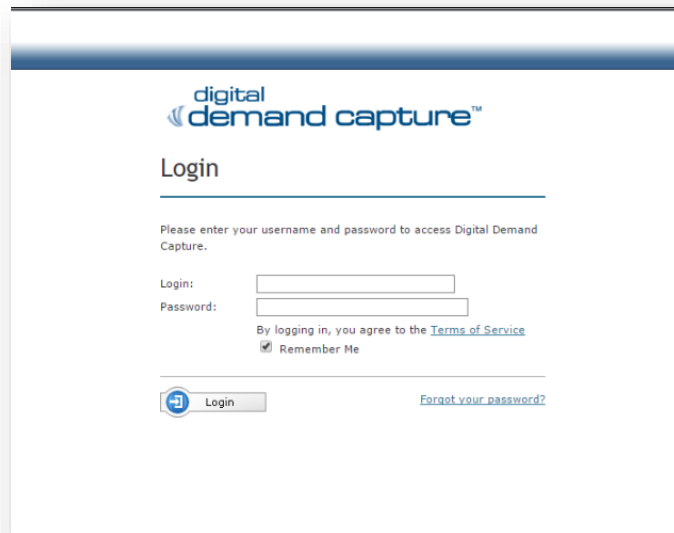
Audience: Primary Opportunity Recipient

This guide is intended to provide an overview of how to connect the Digital Demand Capture (DDC) opportunity portal to your Marketo database through an API connection. The opportunity portal is used to manage open and closed opportunities, access Digital Demand Capture reporting, and manage API connector authentication information.

Note: the data represented will be unique to the opportunity recipient logged into the site.

How to log into the portal

To log into the opportunity portal visit <https://opps.digitaldemandcapture.com>. Here you will see the following login screen:

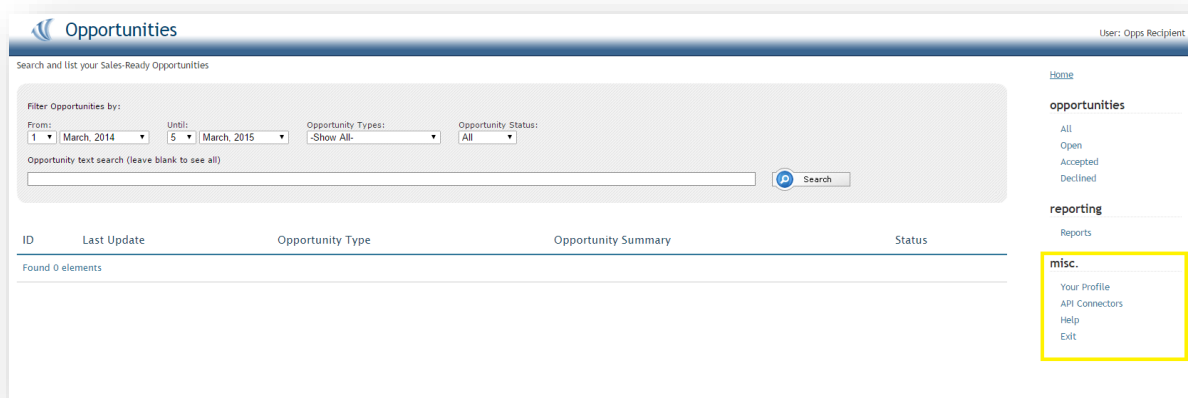


The screenshot shows the login page for Digital Demand Capture. At the top, the logo reads "digital demand capture™". Below the logo is the heading "Login". A message states: "Please enter your username and password to access Digital Demand Capture." There are two input fields: "Login:" and "Password:". Below the password field is a checkbox labeled "Remember Me" and a link for "Terms of Service". At the bottom, there is a "Login" button and a link for "Forgot your password?".

Login to the portal using the opportunity recipient credentials provided to you by your account manager during the scenario launch phase.

What you see when you log in

On the home page of the Digital Demand Capture opportunity portal, there are three main navigation areas on the right hand side: Opportunities, Reporting and Misc.



The screenshot shows the "Opportunities" page. The header includes the "Opportunities" title and the user name "User: Opps Recipient". Below the header is a search bar with the text "Search and list your Sales-Ready Opportunities". There are filters for "Filter Opportunities by:" with options for "From:" (March, 2014), "Until:" (March, 2015), "Opportunity Types:" (Show All), and "Opportunity Status:" (All). A search button is located to the right of the search bar. Below the search bar is a table with columns: "ID", "Last Update", "Opportunity Type", "Opportunity Summary", and "Status". The table shows "Found 0 elements". On the right side, there is a navigation menu with three main sections: "opportunities" (with sub-items: All, Open, Accepted, Declined), "reporting" (with sub-item: Reports), and "misc." (with sub-items: Your Profile, API Connectors, Help, Exit). The "misc." section is highlighted with a yellow box.

To make the initial connection into your Marketo database please navigate to the “API Connectors” link under the “misc.” section of the opportunity portal.

API Connectors

If your instance of Digital Demand Capture includes integration with your organization’s Marketo implementation, authentication into Marketo is managed from this location. Here you’ll be able to manage the user credentials and security tokens you’d like Digital Demand Capture to use when communicating via API with your organizations platform.

The screenshot displays the 'External API Connectors' configuration page. It is titled 'Edit external API settings.' and includes a user profile 'User: Opps Recipient'. The page is divided into three main sections: Salesforce.com, Eloqua, and Marketo. The Marketo section is highlighted with a yellow border and contains the following fields: 'Marketo API User ID' (with a note to enter the Eloqua username), 'Marketo Key' (with a note to enter the Marketo API key), and 'Marketo SOAP API End Point' (with a note to provide the Marketo SOAP API End Point). A 'Save' button is located at the bottom left of the form area. On the right side, there is a navigation menu with links for 'Home', 'opportunities' (with sub-links: All, Open, Accepted, Declined), 'reporting' (with sub-link: Reports), and 'misc.' (with sub-links: Your Profile, API Connectors, Help, Exit).

Initiating the connection is as simple as entering the following required fields that can be found within the “Integration >>Web Services” section of your Marketo User Account:

- Marketo API User ID
- Marketo Key
- Marketo SOAP API End Point

After you’ve entered the required information, click “Save”

API Interactions

Now that the connection between Marketo and you’re opportunity portal is completed, the next step is to define the logic of how you want Digital Demand Capture to interact with Marketo.

Field Mapping

When an opportunity is created by the Digital Demand Capture service, it is sent to the opportunity portal for acceptance or rejection. Upon acceptance of a sales opportunity, the opportunity can be automatically sent into Marketo where a new record will be created or an existing record will be updated. To do this, you and your account manager will need to collaborate in creating a field mapping document that maps the Digital Demand Capture opportunity fields to corresponding fields in the Marketo Object.

Example.

| DDC Field Display Name | DDC Field Name | Marketo Object Type | Marketo Field Display Name | Marketo Field Name |
|------------------------|----------------|---------------------|----------------------------|--------------------|
| First Name | f_name | Lead | First Name | FirstName |
| Company | company | Lead | Company Name | CompanyName |
| Opportunity Amount | value | Lead | Approximate Value | ApproximateValue |

Once the field mapping document has been completed your account manager will have the mapped values added to the Digital Demand Capture opportunity template for opportunity submissions.

Update Logic

Digital Demand Capture can update records in Marketo based on the records direct interaction with the Digital Demand Capture platform. Work with your account manager to define update parameters.

Example.

| Update Parameter Name | Match Logic | Update Logic | Marketo Field Name |
|---|---------------------------------------|---|--------------------|
| Chat Score Change - Positive | Record has positive chat | +10 to Lead Score | Score |
| Update Competitive Opportunity Lead Field | Chat indicates competitive evaluation | Change Competitive Opportunity leads field to "Yes" value | CompOpportunity |

Help

If at any time you need help and support navigating the Digital Demand Capture opportunity portal you can click on the Help link. This will launch a chat with one of our experts who will assist you further. You can also email your account manager to get support.

