

Goombal – Marketo Integration

Goombal integrates with Marketo in several ways to make it easy for event planners to exchange information and generate reports.

Event Attendee Registrations

If you are using Marketo to set up an attendee registration website and collecting registrations, Goombal can automatically import these registrations in real-time and deliver them to the Goombal Mobile Attendee Check-in application. As attendees are checked-in at the event, and any additional information about attendees such as hot/warm lead are captured, Goombal can send this update back to Marketo and/or SFDC in real-time. This real-time bi-directional integration greatly simplifies registration - lead capture process and also eliminates all manual intervention and associated time lost in processing leads and uploading them into Marketo from your events.

Lead Management

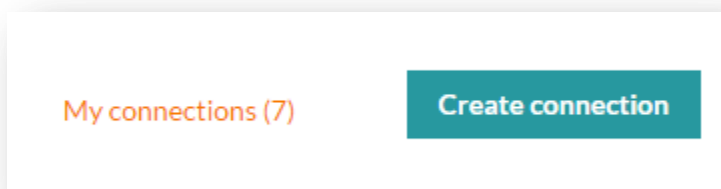
Goombal makes it easy for event marketers to send leads generated at events to Marketo and to track the progression of leads in Marketo using Goombal dashboards. In this scenario, the event planners specifies which lead list in Marketo is associated with a particular event in Goombal. Once this is specified, all leads captured in Goombal are automatically transferred to Marketo for follow-up, etc. This integration eliminates time delays in processing leads, and helps accelerate the sales cycle.

The steps involved in establishing connection from Goombal to Marketo are described below.

Step 1: Establish Connection to Marketo

Note: You may need to request support from your Marketo administrator to get the required credentials.

In the Integration Builder, click on CONNECTIONS tab. Click on CREATE CONNECTION to establish a new connection.



Select Marketo as the application to connect to.

connections / New connection

Application

Select application

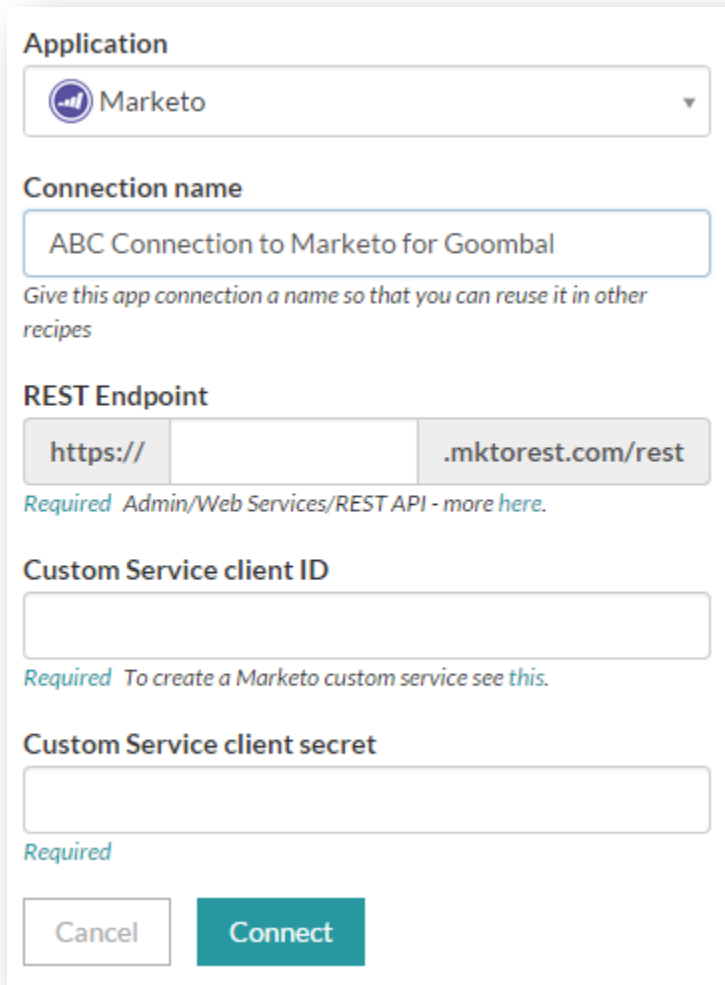
Connection name

Give this app connection a name so that you can reuse it in other recipes

Cancel Connect

Enter credentials for Marketo (as provided by your Marketo administrator)

Marketo Integration Guide



The screenshot shows a configuration dialog box for connecting to Marketo. It includes the following fields and controls:

- Application:** A dropdown menu with the Marketo logo and the text "Marketo".
- Connection name:** A text input field containing "ABC Connection to Marketo for Goombal". Below it is a note: "Give this app connection a name so that you can reuse it in other recipes".
- REST Endpoint:** A text input field with "https://" on the left and ".mktorest.com/rest" on the right. Below it is a note: "Required Admin/Web Services/REST API - more here."
- Custom Service client ID:** An empty text input field. Below it is a note: "Required To create a Marketo custom service see this."
- Custom Service client secret:** An empty text input field. Below it is a note: "Required".
- Buttons:** "Cancel" and "Connect" buttons at the bottom.

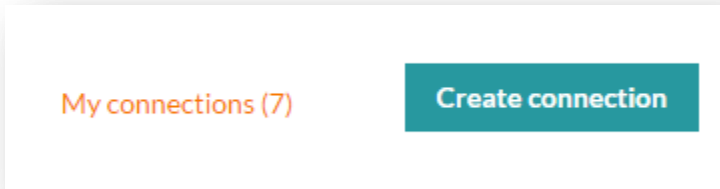
Click CONNECT. If all credentials are properly entered, the system will connect successfully. This will establish your connection to Marketo.

Step 2: Establish Connection to Goombal

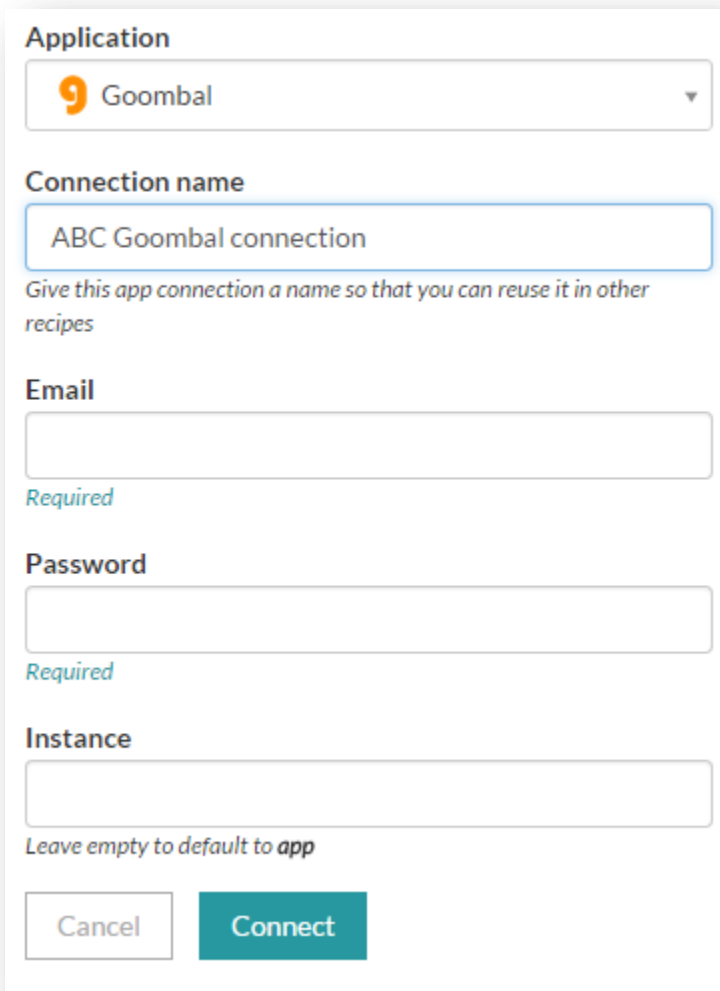
Note: You may need to request support from your Goombal administrator to get the required credentials.

In the Integration Builder, click on CONNECTIONS tab. Click on CREATE CONNECTION to establish a new connection.

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Select Goombal as the application to connect to. Enter credentials for Goombal (as provided by your Goombal administrator)

A screenshot of a connection configuration form. The form is titled "Application" and contains several fields:

- Application:** A dropdown menu with "Goombal" selected, accompanied by a Goombal logo icon.
- Connection name:** A text input field containing "ABC Goombal connection". Below the field is the instruction: "Give this app connection a name so that you can reuse it in other recipes".
- Email:** An empty text input field. Below the field is the label "Required".
- Password:** An empty text input field. Below the field is the label "Required".
- Instance:** An empty text input field. Below the field is the instruction: "Leave empty to default to app".

At the bottom of the form are two buttons: a "Cancel" button and a teal "Connect" button.

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Click CONNECT. If all credentials are properly entered, the system will connect successfully. This will establish your connection to Goombal.

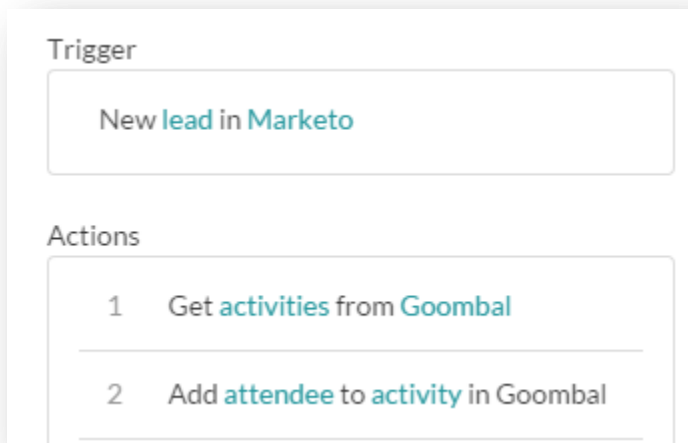
Step 3: Select desired Goombal – Marketo integration recipe

Several recipes are available in the Integration Builder depending on the specific integration scenario you would like to establish. Select the appropriate recipe for your needs. Below is a list of currently-supported recipes specific to Goombal – Marketo integration:

1. Send new Registrant in Marketo to Goombal
2. Send new Lead in Goombal to Marketo

Select desired recipe from the above list in the Integration Builder. COPY this recipe to create an instance for your specific use. Enter settings as shown below.

1. Recipe set up details for: “Send new Lead in Goombal to Marketo”



The screenshot displays the 'Integration Builder' interface. It is divided into two main sections: 'Trigger' and 'Actions'.
Under the 'Trigger' section, there is a single dropdown menu with the selected option 'New lead in Marketo'.
Under the 'Actions' section, there are two numbered steps:
1. 'Get activities from Goombal'
2. 'Add attendee to activity in Goombal'

- Select the Marketo Lead List that contains the registrant list you wish to send to Goombal by clicking on the drop down list and selecting the list name

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Trigger

New lead in Marketo

Application

Marketeto

Trigger

New lead

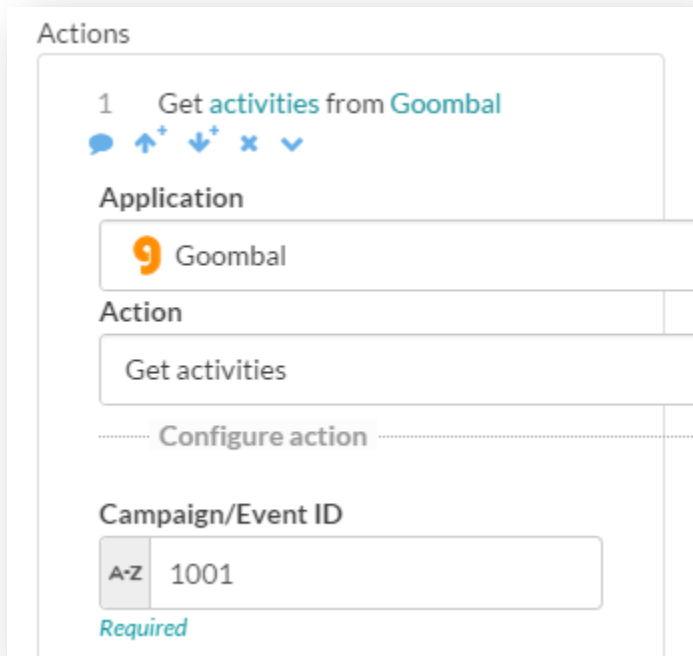
Configure trigger

List

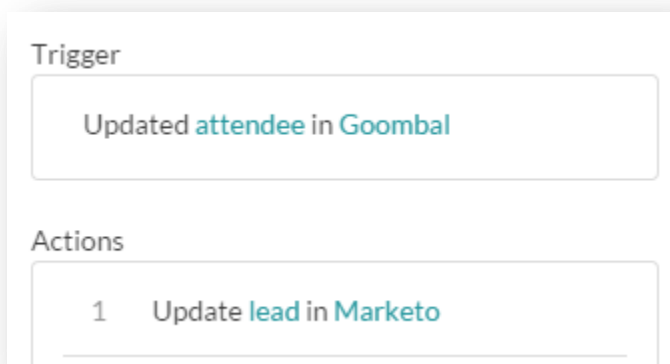
List A

Required

- Enter the Goombal Activity ID where you want the leads to be sent to



- START the recipe to enable data transfer. All existing registrants (leads) from Marketo will be transferred to Goombal. Any new registrants that come in will also be transferred within a few minutes
2. Recipe set up details for: “Send new Lead in Goombal to Marketo”



- Provide the Goombal Activity Campaign / Event ID you have entered in your event plan to get information from to send to Marketo. Enter this information in the CAMPAIGN field below

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- Select a date from which you want the data to be sent. The default is 1 week prior to when you START the recipe
- START the recipe to enable data transfer. All existing leads from the date you specified above will be transferred to Marketo. Any new leads that come in will also be transferred within a few minutes

Trigger

Updated attendee in Goombal

Application

Goombal

Trigger

Updated attendee

Configure trigger

Campaign

A-Z 1000

Required

Since

Defaults to 1 week before recipe start