6CONNEX

Marketo Syncing User Guide / v2.1

This guide covers the steps necessary to sync data from 6Connex to Marketo; before any sync is possible, please follow the steps in the Setup Guide.

Overview

The following data can be synced from 6Connex to Marketo.
- Standard Fields/User Profile
- Custom Fields
- Activity Data and Details

Before starting the syncing, you will need to complete the steps in the Marketo Syncing Setup Guide.

Additional Marketo Setup

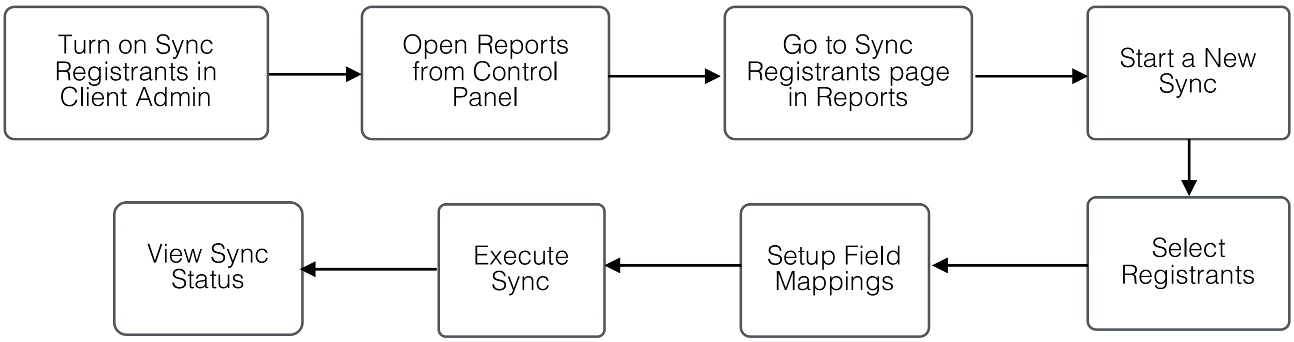
- If the fields you want to sync over don't exist in your Marketo instance, you will need to add Marketo's Custom Fields in the Field Management section.

- If you use the Registration Set feature on the 6Connex side, you will need to add List in Lead Database. See details below in the Sync Registration Set section.

- If you want to sync users' activities details, for example, the specific content items a user viewed, you will need to setup Custom Activities on the Marketo side. See details below in Sync Activity Details section.

Syncing Process Workflow

To start a syncing process workflow, go to your 6Connex Virtual Experience Control



Panel and click “Tracking & Metrics”. Once the Reporting dashboard has loaded, click “Sync Registrants” at the right top of the page.

Clicking “Start a New Sync” will start a new syncing process. Use the filters on the Select Registrants page to select which users you want to sync over or which users you don’t want to sync over. After that, you need to setup Field Mappings. Once that is done, click the “Start” button to start the syncing.

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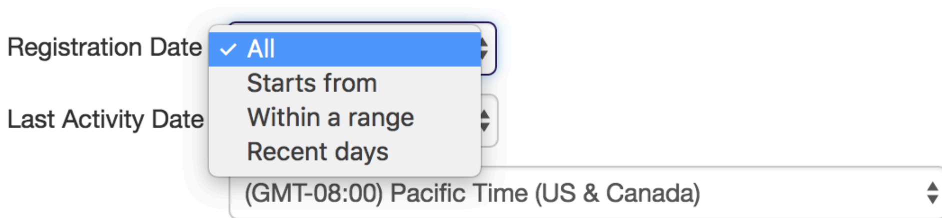
Filters

There are two types of filters: Date Filters and Condition Filters.

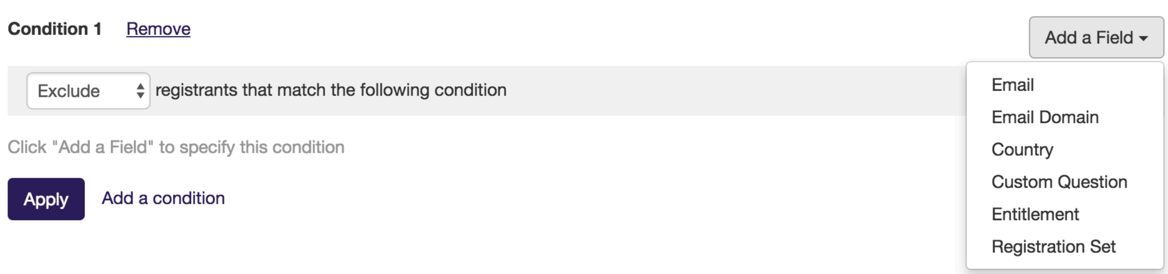
Date Filters
- Registration Date
- Last Activity Date

There are four options for the Registration Date filter: All, Starts from, Within a range, Recent days.



Condition Filters
- Email
- Email Domain
- Country
- Custom Question
- Entitlement
- Registration Set

You can choose to include or exclude registrants that match the condition filters.



Field Mappings

There are three types of fields you can map to Marketo's fields: Standard Fields, Custom Fields, Activity Data.

On the Setup Field Mappings page, check the boxes of the fields that you want to sync to Marketo and fill in the corresponding field name on the Marketo side. If a field does not exist in Marketo, you need to add a new custom field in Field Management on the Marketo side.

Status Fields
Each user can have status fields, the value of these status fields will be Yes or No depending on the user's activities.

- Status: Registered
- Status: Attended Live
- Status: Attended On-Demand
- Status: Did Not Attend
- Status: Attended Webinar
- Status: Attended Moderated Chat
- Status: Viewed Video
- Status: Viewed Link
- Status: Downloaded Asset
- Status: Visited Booth
- Status: Visited Auditorium
- Status: Visited Meeting Room
- Status: Visited Custom Room
- Status: Visited Lounge
- Status: Clicked Warp
- Status: Opened HTML Window

In order to determine the value of the following fields, you will need to define the Live and On-Demand dates.

- Status: Registered
- Status: Attended Live
- Status: Attended On-Demand
- Status: Did Not Attend

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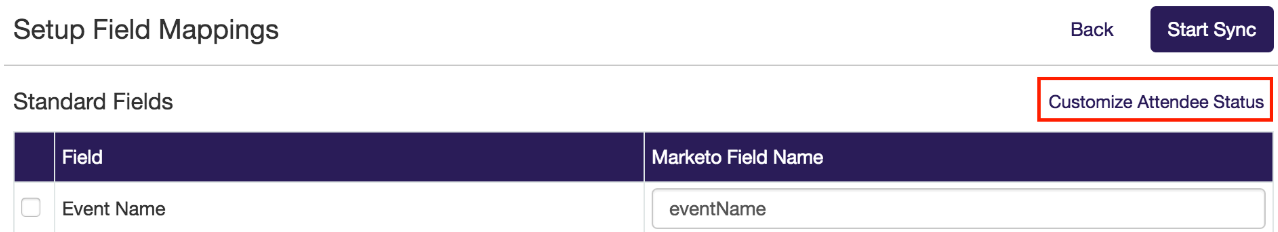
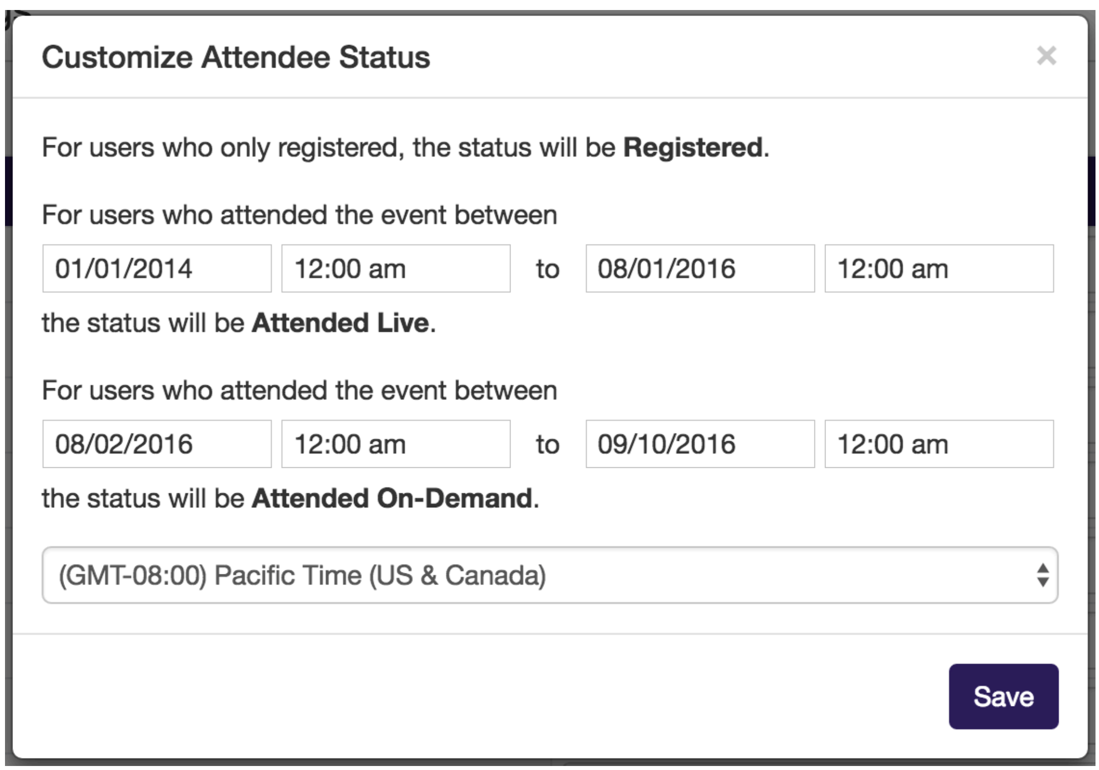


On the Setup Field Mapping page, click “Customize Attendee Status” to open a customize window.



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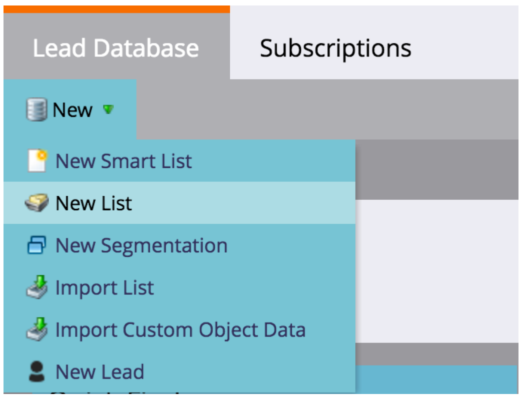
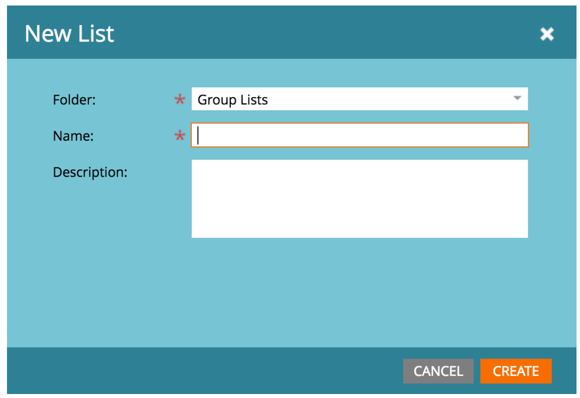
Sync Registration Set

The registration set data will be mapped to Marketo's Lead List. Here is how to add a Lead List on the Marketo side.





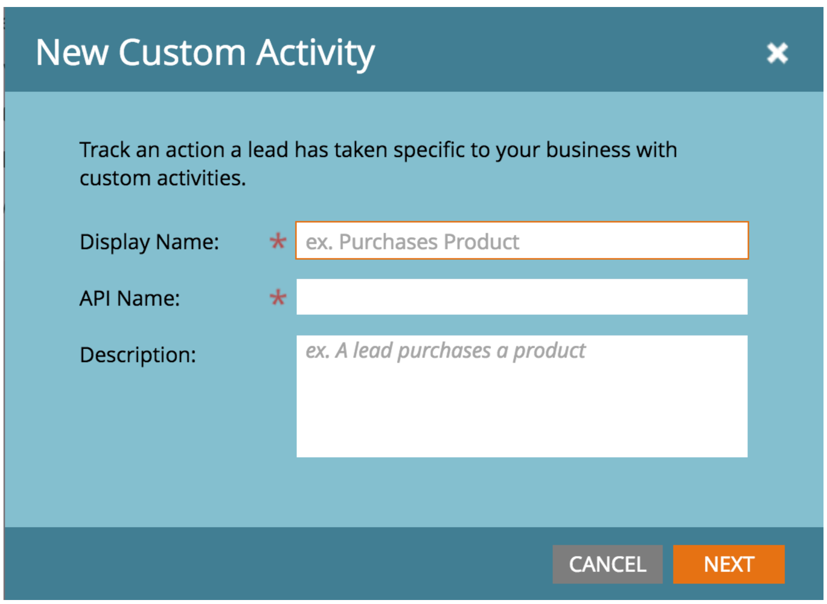
In Lead Database, click "New List". Select "Group Lists" for Folder field. The name of the list should be exactly the same as the registration set name.

After the syncing, you will be able to see users in the same registration set under that list in the Lead Database.

Sync Activity Details

Activity Details are synced over to Marketo as Marketo Custom Activity. Before the sync, you will need to add related Custom Activity. You only need to add Marketo Custom Activity for those activities that you want to sync.

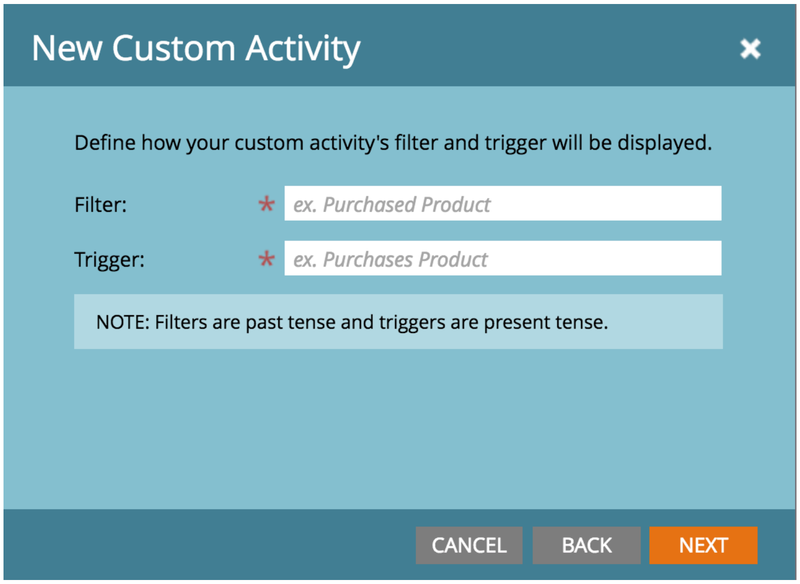
To add a Marketo Custom Activity, click Admin Menu on the Marketo page, and click "Marketo Custom Activities". Then click "New Custom Activity".



In the New Custom Activity Form, the Display Name must be one of the following:

- Attend Webinar
- View Video
- View Link
- Download Asset
- Attend Moderated Chat
- Visit Booth
- Visit Auditorium
- Visit Meeting Room
- Visit Custom Room
- Visit Lounge
- Click Warp
- Open HTML Window

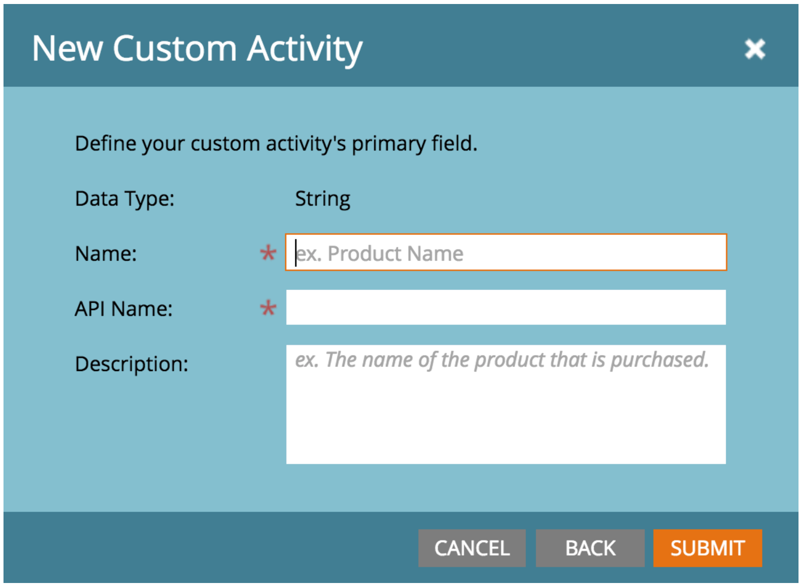
Clicking [Next] will bring up the Filter and Trigger fields, you can use names as you see fit.



Then, clicking [Next] goes to the primary field setup of the custom activity.

For content related activities (Attend Webinar, View Video, View Link, Download Asset, Attend Moderated Chat, and View Content) the value of the Name field must be “Content Title”, and the value of the API Name field must be “contentTitle”.

For room related activities (Visit Booth, Visit Auditorium, Visit Meeting Room, Visit Custom Room, and Visit Lounge) the value of the Name field must be “Room Name”, and the value of the API Name field must be “roomName”.



Name	API Name	Description	Data Type
* Content Title	contentTitle	The title of the content	string
Content ID	contentID	The id of the content	string
Content Display Name	contentDisplayName	The display name of the content	string

Name	API Name	Description	Data Type
* Room Name	roomName	The name of the room	string
Room ID	roomID	The id of the room	string

For content related activities, you need to add two additional fields: Content ID and Content Display Name.

For room related activities, you need to add one additional field: Room ID.

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