



Connecting Brainshark to your Marketing Automation System

Overview

This document outlines how to incorporate Brainshark presentations into your Marketing Automation (MA) campaigns and connect the Brainshark presentation views back to your MA system.

All Marketing Automation systems are different so be sure to work with your MA Administrator for best results.

Requirements

1. A Brainshark Administrator and your MA Administrator should all be available to complete the setup.
 2. To connect viewing data from your MA system to Salesforce you must have the following:
 - a. One of these Salesforce.com Editions:
 - i. Professional
 - ii. Enterprise
 - iii. Unlimited
 - b. A Salesforce.com integration via the App Exchange.
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Capturing the Recipient's Information

Step 1

Personalized URL's (PURL's) for Outbound Marketing

This is the process of appending the Brainshark URL to be sent out in your MA campaign. Connect your MA unique identifiers (tokens in Marketo, for example) with Brainshark Integration Keys (Int. Keys).

See the Marketo examples below:

- Standard Brainshark URL: <http://www.brainshark.com/primepay/vu?pi=zFvzAX7elz9SFXz0>
- Personalized URL: <http://www.brainshark.com/primepay/vu?pi=zFvzAX7elz9SFXz0&int1=jhill@brainshark.com&int2=cmckillop@brainshark.com&int3=006a00000v7xLz>

What's happening here is that we're taking a basic Brainshark URL and adding integration keys to it so we know:

1. &int1= the ID of the "Sender"
2. &int2= the ID of a Lead/Contact
3. &int3= the ID of a Campaign

Not only do we get the viewing data, but we can now see which lead actually viewed it since we're "connecting" that Brainshark URL to the lead, using unique identifiers from the MA system.

Step 2

Silent Guestbook for Inbound Marketing

(Skip this step if a landing page or form is not being used)

We can also connect the viewing data back to a landing page or form by creating a silent guestbook, meaning we can tie those form details provided to standard or custom guestbook fields.

See the Marketo example below:

<https://www.brainshark.com/brainsharkinc/vu?pi=zGkziEEgTz8BJhz0&fn={{lead.First Name:default= }}&ln={{lead.Last Name:default= }}&em={{lead.Email Address:default= }}>

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Capturing the Recipient's Information, Continued

Step 2, continued

What's shown in red, below, is a Brainshark guestbook field (&fn, for example) tied to a Marketo landing page custom object (lead.First Name).

<https://www.brainshark.com/brainsharkinc/vu?pi=zGkziEEgTz8BJhz0&fn={{lead.First Name:default= }}&ln={{lead.Last Name:default= }}&em={{lead.Email Address:default= }}>

This will tie the registration form data with their Brainshark presentation viewing data.

For a full list of all Brainshark guestbook fields click here:

www.brainshark.com/brainsharkinc/vu?pi=zCFz12Hr7Cz0z0



Reporting from Brainshark back to your Marketing Automation (MA) System

Option 1

API's

Your web developer can make API calls to collect all Brainshark data from the PURL's you've included in your e-mail campaign or web form (silent guestbook). This can be done using Brainshark API's or your Marketing Automation system's API's.

- See the following link to get started with Brainshark API's: <http://www.brainshark.com/developer/>
 - Contact your Brainshark Account Manager for further documentation on our REST API's
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Option 2

FTP Reports

Brainshark reporting can be set up to deliver FTP reports back to a MA platform, to provide Brainshark viewing behavior back to contact records in a lead list, for example.

- Contact your MA system administrator to confirm whether or not your platform can accept FTP reports.
- FTP reporting step by step below:

Step	Action
1	Go to your Brainshark "Viewing Details by Presentation" report for output to SFTP.
2	Create a "Viewing Details by Presentation" report to include views from every presentation in your Brainshark instance. This is best done by a user with site administration privileges.
3	Schedule the report to run "Nightly" (the shortest interval our reporting interface makes available.)
4	Give it a descriptive name. In the FTP directory, it's good to be able to pick out the file easily.
5	Set it to run over a long period of time.
6	Set Date range: to "Last 7 days".

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Reporting from Brainshark back to your Marketing Automation (MA) System, Continued

FTP Reports,
continued

FTP Reports

Step	Action
7	<p>From the Report Options tab, choose the fields necessary for whatever business process are being supported, but at a minimum –</p> <ul style="list-style-type: none"> a) View Key Identifier (the only unique identifier for each specific view. Good to have so the receiving system can avoid creating duplicate records.) b) Presentation ID (the numeric PID for the viewed presentation. Good to have so the receiving system can set activity based on viewing a specific presentation.) c) Presentation Title (Good to have to have a better idea what they viewed. You can't use title as an identifier since there are no technical controls to prevent duplicate titles in Brainshark.) d) View Tracking Code (Depending on business process, the TX is useful for identifying unique information on views.) e) GB Email (Unique ID for the person viewing the presentation.) f) View Date Time g) View Total % of Slides h) View Total % of Duration (this is based on the total playing length, mostly determined by length of audio.) i) Integration AppKey1 (Sender), Integration AppKey2 (Viewer), and Integration AppKey3 (identifying the campaign or opportunity.

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Reporting from Brainshark back to your Marketing Automation (MA) System, Continued

Option 3

Your MA Admin can set up FTP rules to accept Brainshark reporting spreadsheets. With the addition of one column specific to the MA ID for each contact record, those Brainshark reports/spreadsheets can be run automatically and fed into your MA system giving you the viewing data needed to adjust the lead score.

**Output to
“File transfer”
(FTP / SFTP / FTPS)**

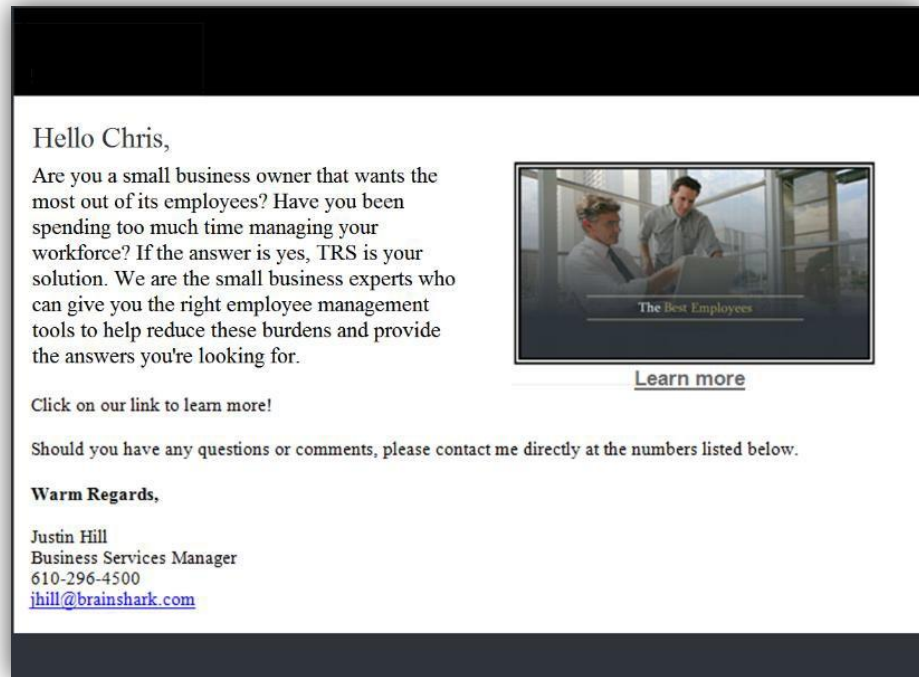
Step	Action
1	From the FTP Tab provide the details of the FTP server. It's a good idea to have a unique FTP user created to handle this. You should never allow Anonymous Login to be used. Don't forget to check the Port number. Normally it's 22 for SFTP (21 for FTP) but many IT departments use a different one.
2	Choose SFTP as the protocol if available.
3	Give the output file a descriptive file name. Some servers may have length restrictions. DO NOT tick the "Append date to file name" box. That would have a new file created every day. You want to have one file overwritten every night.



Marketo Campaign Example

Build e-mail

Below is an example of a campaign email. The icon on the right will allow the recipient (Chris) to click and view the presentation. The Brainshark presentation has the Int. Keys tied to it. Once the recipient clicks the link their data is captured and we can export a report with the viewing details along with who sent it and who viewed it.





Reporting from Brainshark

Sample Report

The Brainshark Report provides a campaign's viewing details including the sender's and recipient's email addresses and a unique identifier for the e-mail campaign, in this case a Salesforce Campaign ID.

1	2	3	4	5
Title	DateTime	ViewingTime	ViewTotalSlidesViewed	ViewTotalPctofDuration
ePay Employee Management Solutions (#145977288)	1/1/2014 17:27	93	8	78
ePay Employee Management Solutions (#145977288)	12/14/2012 11:51	10	1	8
ePay Employee Management Solutions (#145977288)	12/14/2012 10:28	0	4	44

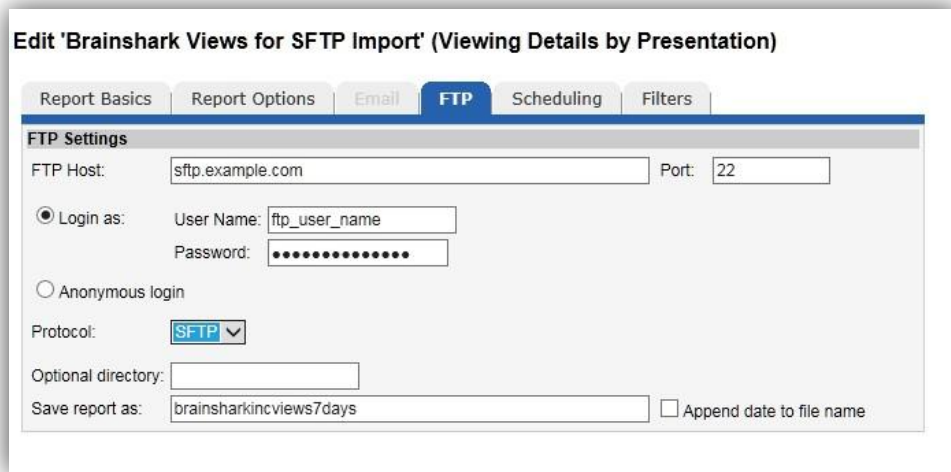
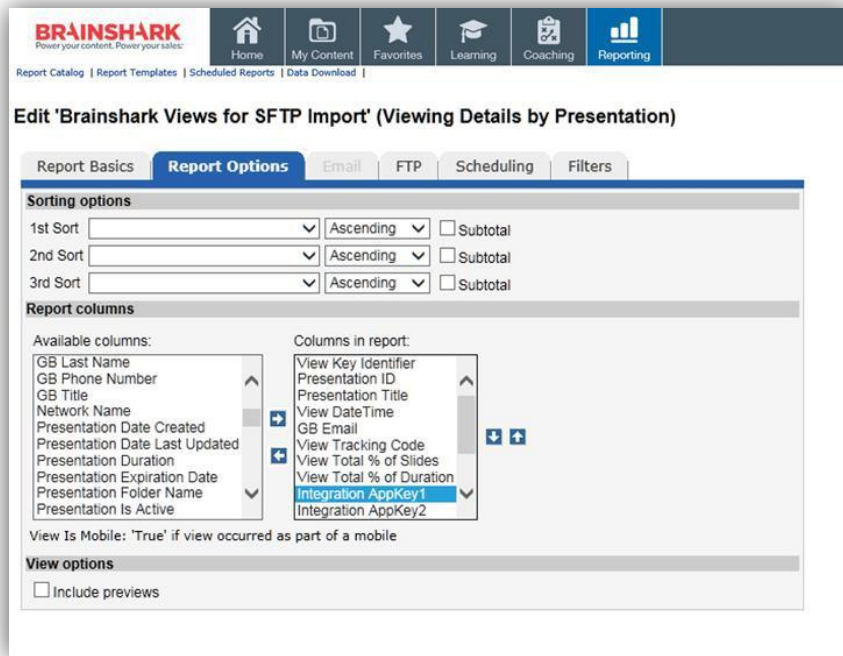
5	6	7	8	9
		Sender E-mail Address	Recipient E-mail Address	Salesforce ID
ViewTotalPctofDuration	ViewTotalPctofSlides	IntegrationAppKey1	IntegrationAppKey2	IntegrationAppKey3
78	88	jhill@brainshark.com	cmckillop@brainshark.com	006a000000v7xLz
8	11	dohertykathryn@gmail.com	kdoherly@brainshark.com	006a000000v7xLz
44	44	tlee@brainshark.com	tlee1972@gmail.com	006a000000v7xLz



Sending Brainshark Viewing Data back to MA Platform via Brainshark FTP

Brainshark Report Configuration

Using the “Data Download” Report configure the Report Options and FTP tabs:





Resources

On-Demand Learning

Visit Brainshark's Help and Training portal @ <http://www.brainshark.com/help-and-training>

Technical Support

Contact the Brainshark Support Team, Monday – Friday 8:00 AM – 9:00 PM (Eastern).

Phone: 781-370-8222

Email: support@brainshark.com
