

RingCentral Webinar for Marketo

Admin guide



CONTENTS

CONTENTS	2
Introduction	3
About RingCentral Webinar for Marketo	3
Requirements	3
About this Guide	3
Configuration	4
Add Configuration (One-time setup for the integration)	4
Steps to add configuration	4
Manage Configuration	6
Test Existing Configuration	7
Edit Configuration	8
One-time setup in Marketo	10
Add Webhook	10
Add Custom Object & Custom Fields	10
Create Program member fields	11
Other Information	12

Introduction

About RingCentral Webinar for Marketo

The RingCentral Webinar for Marketo provides seamless integration between Marketo and your RingCentral Webinar for easier lead management as registration, attendee, and other webinar data are synced to Marketo.

Requirements

Marketo Subscription:

- Marketo Engage Jumpstart & above

RingCentral Subscription:

- MVP Standard and above

About this Guide

The aim of this guide is to assist the RingCentral Webinar admin in setting up the RingCentral Webinar for Marketo so that the users of their organization can configure the data mappings among RingCentral Webinar & Marketo Program.

Configuration

Add Configuration (One-time setup for the integration)

Any RingCentral user who has the “Webinar Settings” permission enabled to its role is required to perform this setup once, for the entire organization. They also need to have access to the Marketo Admin account to complete this setup. This step establishes the connection between RingCentral & Marketo. This can be discovered from the below entry points:

1. RingCentral Webinar for Marketo
2. Webinar section in RingCentral MVP App
3. Adobe App exchange

Steps to add configuration

1. Sign in to your Marketo admin account, go to Admin > Users & Roles > Roles > New Role, and create an API role.
2. Go to Admin > Users & Roles > Users > Invite New User and create an API Only User.

The screenshot shows the 'Invite New User' dialog box. At the top, there's a title bar with 'Invite New User' and a close button. Below it is a progress indicator with three steps: 'Step 1: Info', 'Step 2: Permissions' (which is highlighted in blue), and 'Step 3: Message'. Under the 'Roles:' section, a list of roles is displayed in a dropdown menu. The roles are: 'Admin', 'Analytics User', 'API Only Role' (which is selected and highlighted in orange), 'API only role for max's webinar', 'API Only Role N', and 'API Only Rolez'. Below the role list, there is a checkbox labeled 'API Only:' which is also checked. At the bottom of the dialog, there are three buttons: 'CANCEL', 'BACK', and 'NEXT'.

3. Go to Admin > LaunchPoint > New > New Service and create a Custom Service. Once created, locate your newly created Custom Service and click View Details. Copy the Client Id and Client Secret to a text file.

✕

Details

Client Id:	4ca3f988-303b-4a16-8f9e-17595ed3e819
Client Secret:	C91x5Ou4Jau4SF5wxs4nThC8weCPxRGN
Authorized User:	aparna_api_only_user@ringcentral.com

GET TOKEN

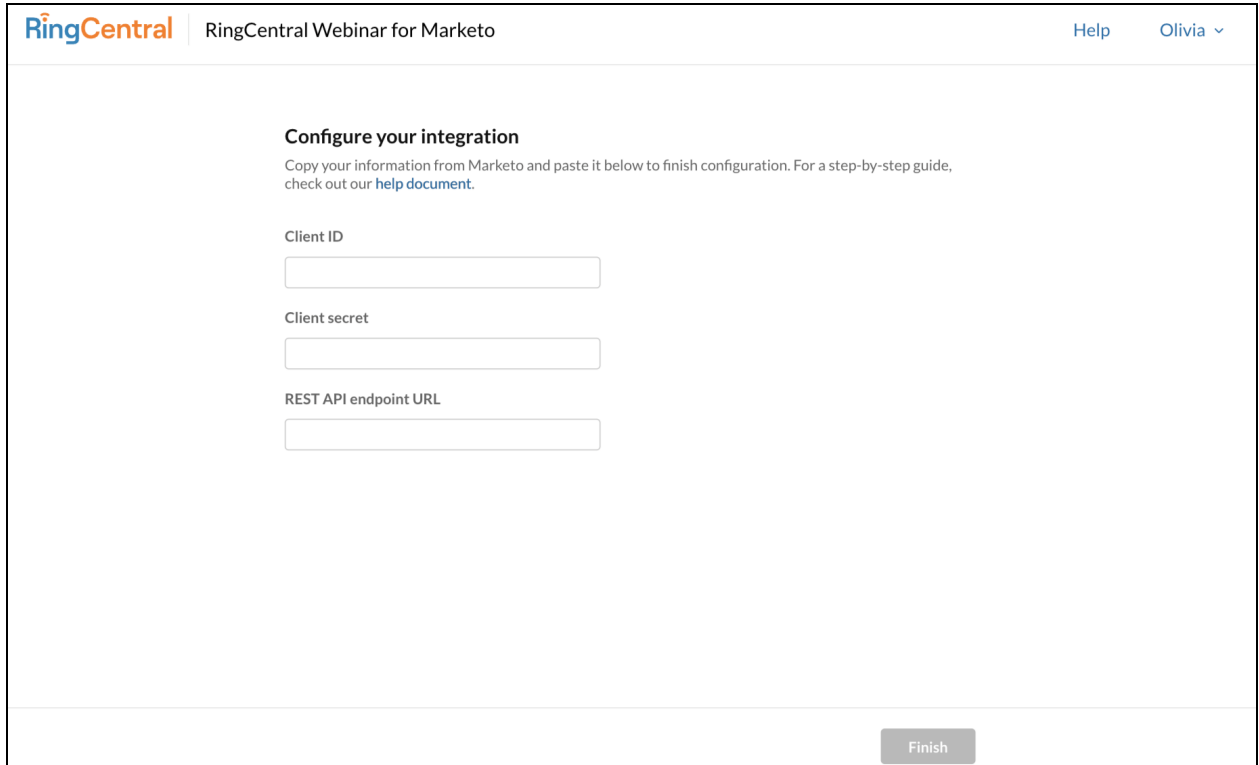
CLOSE

4. Go to Admin > Web Services, find the REST API section, and copy the Endpoint to a text file.

REST API

Endpoint:	https://635-EBS-000.mktoreset.com/rest
Identity:	https://635-EBS-000.mktoreset.com/identity
REST API documentation:	http://developers.marketo.com/documentation/rest

5. Sign in to [RingCentral Webinar for Marketo](#) with your RingCentral account. Make sure your RingCentral account has “Webinar Settings” permission enabled for your role. You can get this checked by your organization administrator.
6. You will be taken to the configuration page. Enter the Client ID, Client Secret & REST API endpoint URL which you have copied from the above steps 1-4. Click the Finish button.
7. The integration will validate the data you have entered with Marketo, if it's correct you will be taken to the success screen else you will receive an error message.



The screenshot shows the 'Configure your integration' page in RingCentral Webinar for Marketo. The page has a header with the RingCentral logo, the title 'RingCentral Webinar for Marketo', and user information 'Help' and 'Olivia'. The main content area is titled 'Configure your integration' and includes a sub-header 'Configure your integration' and a paragraph: 'Copy your information from Marketo and paste it below to finish configuration. For a step-by-step guide, check out our [help document](#).' Below this are three input fields: 'Client ID', 'Client secret', and 'REST API endpoint URL'. A 'Finish' button is located at the bottom right of the form area.

Manage Configuration

This section could be used to test or update any existing configuration. You'll only be able to access this section if you have "Webinar Settings" permission enabled on your RingCentral user account. To go to the Manage Configuration section, follow these steps:

1. Log in to RingCentral Webinar for Marketo using your RingCentral account.
2. Click on your name at the top right corner of the screen
3. Click on Manage Configuration.

RingCentral | RingCentral Webinar for Marketo

Help | Olivia ▾

Manage configuration
Sign out

Map your webinar data to Marketo

Automatically sync your registration, attendee, and other webinar data with Marketo campaigns and fields.

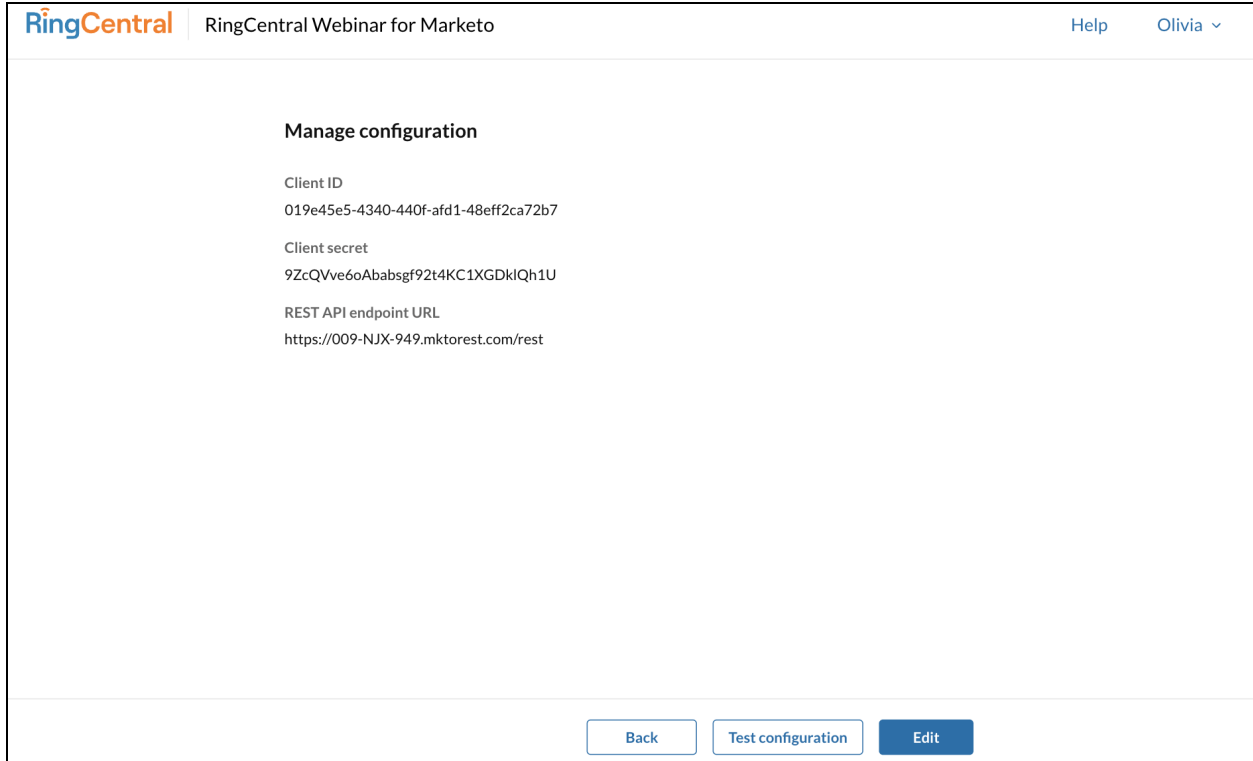
Upcoming | Past

Create new mapping

Title	Date	Time
Demo whiteboard	Feb 14th, 2022	9:30 AM - 10:30 AM
Demo whiteboard	Feb 14th, 2022	9:30 AM - 10:30 AM
Demo whiteboard	Feb 14th, 2022	9:30 AM - 10:30 AM
Demo whiteboard	Feb 14th, 2022	9:30 AM - 10:30 AM

Test Existing Configuration

If you require to test the existing configuration click on the 'Test configuration' button on the Manage Configuration page. If the test is successful you will see the success message - 'Configuration test successful', if it's not successful you will see an error message.



The screenshot shows a web interface for RingCentral. At the top left is the RingCentral logo, followed by the text "RingCentral Webinar for Marketo". At the top right are links for "Help" and "Olivia" with a dropdown arrow. The main content area is titled "Manage configuration" and lists the following details:

- Client ID: 019e45e5-4340-440f-afd1-48eff2ca72b7
- Client secret: 9ZcQVve6oAbabsgf92t4KC1XGDkIQh1U
- REST API endpoint URL: https://009-NJX-949.mktorest.com/rest

At the bottom of the page, there are three buttons: "Back", "Test configuration", and "Edit".

Edit Configuration

If you require to edit the existing configuration click on the 'Edit' button on the Manage Configuration Page' & you will be able to update the configuration.

RingCentral | RingCentral Webinar for Marketo Help Olivia ▾

Manage configuration

Client ID

Client secret

REST API endpoint URL

[Cancel](#)

Note - Manage Configuration is not part of the one-time setup.

One-time setup in Marketo

The steps in this section require administrative access to your Marketo account. The one-time setup in Marketo requires the below steps to be completed.

1. Create a Webhook.
2. Create a Custom object with custom fields.
3. Create Program member fields to store the registrant's unique join url, attendee join time & attendee leave time.

Add Webhook

1. Go to Admin > Webhooks > New Webhook & create a new webhook. Provide the values to the following fields:
 - a. Webhook Name: Enter your preferred WebHook Name
 - b. Description: Enter your preferred WebHook Description used for your RingCentral Webinar Registration.
 - c. URL:

https://api.marketo-webinar.ringcentral.com/hooks/webinars/register?lead_id={{lead.Id}}&first_name={{lead.First Name:default=xxx}}&last_name={{lead.Last Name:default=xxx}}&email={{lead.Email Address:default=xxx}}&access_token={{my.rc_access_token}}
 - d. Request Type: POST
 - e. Template: Leave blank.
 - f. Request Token Encoding: None
 - g. Response Type: JSON
2. Click Create

Add Custom Object & Custom Fields

1. Go to Admin > Marketo Custom Objects > Click New Custom Object. Provide the values to the following fields:
 - a. Display Name: Enter your preferred display name.
 - b. API Name: This will auto-populate once you enter your preferred display name.
 - c. Plural Name: This will auto-populate once you enter your preferred display name.
 - d. Description: Additional information from webinars including title, description, etc.
2. Select Show for Show in lead Detail, and then click Save.

- Click the Fields tab at the top of the page for this newly created Marketo Custom Object and click New Field. Create fields to store the following information. The API name will auto-populate once you enter your preferred display name. You can enter any preferred description. Please make sure that the name, API name, Data Type & state of the fields are as mentioned in the table.

Display Name	API Name	Type	State
Email	email	link (dedupe)	Published
Webinar Session ID	webinarSessionID	String (dedupe)	Published
Registration Questions	registrationstion Questions	text	Published
Webinar Title	webinarTitle	string	Published
Webinar Description	webinarDescription	Text	Published
Webinar date time	webinarDateTime	datetime	Published

- Click Custom Object Action > Approve Object to change the field state to Published.

Create Program member fields

1. Go to Admin > Field Management > New Custom Field & create three fields with the below values. The API Names will auto-populate once you enter the name.

Object	Type	Name	API Name
Program Member	Url	RC Webinar Unique Join URL	rCWebinarUniqueJoinURL
Program Member	Datetime	RC Webinar Join Time	rCWebinarJoinTime
Program Member	Datetime	RC Webinar Leave Time	rCWebinarLeaveTime

Other Information

Additional resources can be found as below:

[User Guide](#)

[FAQs](#)

For more help, visit support.ringcentral.com or call 1 (888) 528-7464