

RingCentral Webinar for Marketo

User guide



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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

This guide will assist RingCentral Webinar users in mapping their RingCentral Webinar with Marketo Programs & Campaigns so they can sync data from RingCentral Webinar to Marketo & vice versa.

Setup for each webinar in Marketo

The below steps are required to be completed for each webinar. It requires access to your Marketo account:

1. Create a Program.
2. Create Landing Page & Registration form.
3. Create email templates
4. Create campaigns.

Create a Marketo Program

1. Sign in to your Marketo account. Go to Marketing Activities and create a new Smart Campaign folder. Enter a Name and its Description.
2. Click on this folder and create a New Program. Enter the information in the following fields:
 - a. Campaign Folder: *Locate the Campaign Folder.*
 - b. Name: *Enter the name for your program.*
 - c. Program Type: Event
 - d. Channel: Webinar
 - e. Description: *description of your program*

New Program ✕

Campaign Folder: * RC Webinar Demo ▼

Name: * RC Webinar Demo

Program Type: * Event ▼

Channel: * Webinar ▼

Team: * Other ▼

Description:

CANCEL CREATE

Create Landing Page & Registration form

This step is only required if you want to capture registrations from Marketo. If you want to capture registrations from RingCentral then this is not required.

1. Click Assets for the above created Program
2. Click New > New Local Asset. Select Form.
3. Select your Program and enter your preferred Form Name.
4. Click Create.

Note - In order to maintain security best practices, RingCentral allows users to enter their first and last name in accordance with the following conditions. Therefore, ensure that these validations are added to the Marketo form.

1. Unicode characters(including A-Z or a-z letters), numbers (0-9), period (.), apostrophe ('), hyphen/dash , and spaces. No other characters are allowed.

2. The first character must be a unicode character, i.e. the first character can not be numbers (0-9), period (.), apostrophe ('), hyphen/dash , and spaces.
3. These fields cannot be left blank.

New Form ×

Program: *

RC Webinar Demo ▼

Name: *

Description:

☒ Open in editor

CANCEL

CREATE

Note: Editing this form is highly subjective to your needs. At a minimum, it requires First Name, Last Name, and Email address. Enter the information in the required field, and then click Create.

5. Click on your created Program again, click New > New Local Asset. Select Landing Page.
6. Select your Program and enter your preferred Landing Page Name. The Page URL will auto-populate when the Program is selected and/or the Name will be edited.
7. Click Create.

New Landing Page

Program:

*

RC Webinar Demo

Name:

*

Page URL:

*

http://rc-sandbox.ringce...

.html

Description:

Template:

*

Select...

☒

Open in editor

CANCEL

CREATE

8. Once created, click Edit Draft. Click and drag the Form from the Insert Elements field on the right into the main landing page. You will need to select the form you just created in above steps 1-4.
9. Click Landing Page Actions > Approve and Close to finish.

Create email templates

Email templates are only required to be created if you want to send email notifications from Marketo

Registration confirmation email

1. Click on your Program and click New > New Local Asset and select Email.

2. Enter a name of your choice.
3. To include the unique join url in the email draft, click on the Insert token option in the text editor and search for “member.RC Webinar Unique Join URL”
4. Approve and close the email.

Insert Token

Token:

*

Select token...

Default Value:

CANCEL

INSERT

Insert Token

Token:

*

member.RC

Default Value:

{{member.RC Webinar Unique Join URL}}

CANCEL

INSERT

Reminder emails

Create the reminder emails just like Registration confirmation email as per your need. You can include the member's unique join url as in the above steps.

Create Campaigns

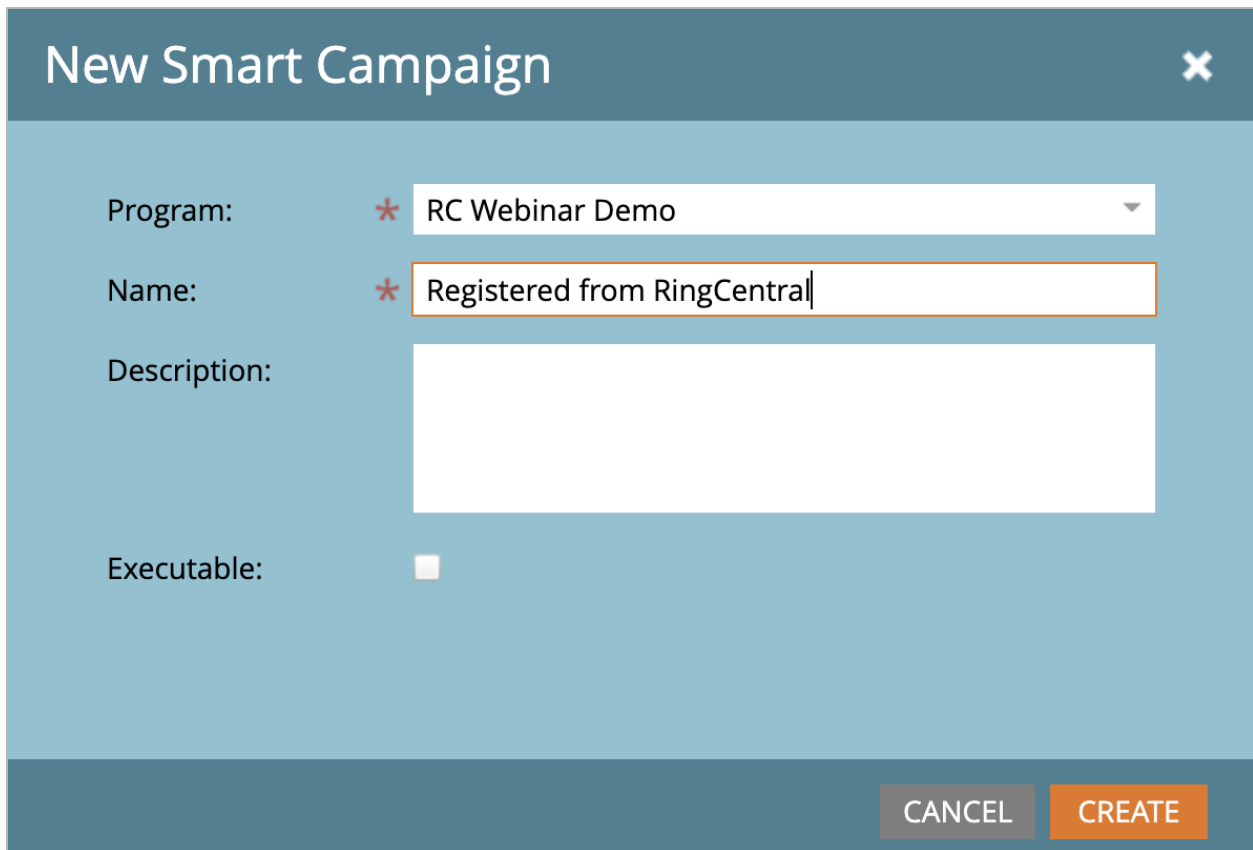
Create the below campaigns following the below steps:

1. Click on your Program, click New > New Smart Campaign. Create the Smart Campaigns.
2. Select your Program, enter the Name, and Description.
3. Make sure you activate all the campaigns otherwise they won't work.

Each of the below campaign section will contain screenshots of the Name, Smart List, and Flow for each Smart Campaign.

Registered from RingCentral

This campaign is only required if you want to capture registrations from RingCentral.



New Smart Campaign ✕

Program: * RC Webinar Demo ▼

Name: * Registered from RingCentral

Description:

Executable: ☐

CANCEL CREATE

Smart List

Registered from RingCentral	Smart List	Flow	Schedule	Results
New	Campaign Actions	View Campaign Members		
Use ALL filters Collapse All Expand All				
Campaign is Requested				
Add Constraint				
Source: is		Web Service API		

Flow

Registered from RingCentral	Smart List	Flow	Schedule	Results
New	Campaign Actions	View Campaign Members		
Collapse All Expand All				
1 - Change Program Status				
Add Choice				
Program: RC Webinar Demo		New Status: Webinar > Registered		

Registered from Marketo

This campaign is only required if you want to capture registrations from Marketo.

New Smart Campaign ✕

Folder: * RC Webinar Demo ▼

Name: * Registered from Marketo

Description:

Executable: ☐

CANCEL CREATE

Smart List

Registered from Marketo | **Smart List** | Flow | Schedule | Results

New ▼ | Campaign Actions ▼ | View Campaign Members ▼

Use ALL filters ▼ | Collapse All ▼ | Expand All ▼

Fills Out Form ⓘ ✕

▶ Add Constraint ▼

Form Name: is ▼ RingCentral Product demo.Registration form ⊕ ▼

Flow

Registered from Marketo Smart List **Flow** Schedule Results

New Campaign Actions View Campaign Members

Collapse All Expand All

1 - Call Webhook ⓘ ✕

Webhook: RCW Registrant Webhook ⚙️ Add Choice

2 - Change Program Status ⓘ ✕

Program: RC Webinar Demo New Status: Webinar > Registered ⚙️ Add Choice

3 - Add to List ⓘ ✕

List Name: RC Webinar Demo, Registered from Marketo list ⚙️ Add Choice

Registration confirmation mail

This campaign is required only if you want to send the confirmation email from Marketo

New Smart Campaign ✕

Folder: * RC Webinar Demo

Name: * Registration confirmation email

Description:

Executable: ☐

CANCEL CREATE

Smart List

The screenshot shows the 'Smart List' configuration window. At the top, there are tabs: 'Registration confirmation email', 'Smart List' (selected), 'Flow', 'Schedule', and 'Results'. Below the tabs, there are three buttons: 'New', 'Campaign Actions', and 'View Campaign Members'. Underneath these buttons are three links: 'Use ALL filters', 'Collapse All', and 'Expand All'. The main area has an orange header bar that says 'Campaign is Requested' with an information icon and a close button. Below this, there is a section for adding constraints. It includes a label 'Source:' followed by a dropdown menu showing 'is'. To the right of this is another dropdown menu showing 'Web Service API'. There is an 'Add Constraint' button with a plus icon and a dropdown arrow.

Flow

The screenshot shows the 'Flow' configuration window. At the top, there are tabs: 'Send registration confirmation email', 'Smart List', 'Flow' (selected), 'Schedule', and 'Results'. Below the tabs, there are three buttons: 'New', 'Campaign Actions', and 'View Campaign Members'. Underneath these buttons are two links: 'Collapse All' and 'Expand All'. The main area has a purple header bar that says '1 - Send Email' with an information icon and a close button. Below this, there is a section for adding choices. It includes a label 'Email:' followed by a dropdown menu showing 'Send Registration confirmation email Aparna Test Program'. To the right of this is an 'Add Choice' button with a plus icon and a dropdown arrow.

Attended

This campaign is required for successful integration

New Smart Campaign ✕

Program: * RC Webinar Demo ▼

Name: * Attended

Description:

Executable: ☐


CANCEL CREATE

Smart List

Attended **Smart List** Flow Schedule Results

New ▼ Campaign Actions ▼ View Campaign Members

Use ALL filters ▼ | Collapse All Expand All

 Campaign is Requested ⓘ ✕

Source: is ▼ Web Service API ▼

Add Constraint ▼

Note: Enter a memorable and well-defined campaign description

Flow

The screenshot shows a software interface with tabs: Attended, Smart List, Flow, Schedule, and Results. Below the tabs are buttons: New, Campaign Actions, and View Campaign Members. There are also links for Collapse All and Expand All. A modal window titled '1 - Change Program Status' is open. It contains two dropdown menus: 'Program:' with the value 'RC Webinar Demo' and 'New Status:' with the value 'Webinar > Attended'. An 'Add Choice' button is visible in the top right corner of the modal.

Absentee

This is not a required campaign for integration. But you could create it as per your needs to store the Absentee data.

The screenshot shows a 'New Smart Campaign' dialog box. It has a title bar with a close button. The form contains the following fields:

- Program:** A dropdown menu with 'RC Webinar Demo' selected, marked with a red asterisk.
- Name:** A text input field containing 'Absentee', marked with a red asterisk.
- Description:** A large empty text area.
- Executable:** A checkbox that is currently unchecked.

 At the bottom right, there are two buttons: 'CANCEL' and 'CREATE'.

Smart List

Absentee Smart List Flow Schedule Results

New Campaign Actions View Campaign Members

Use ALL filters Collapse All Expand All

1 - Member of Program

Member of Program: true

Program: is RC Webinar Demo

2 - Not Program Status was Changed

Program: is RC Webinar Demo

Date of Activity: between 05/6/2022 05/10/2022

New Status: is not Webinar > Attended

Old Status: is Webinar > Registered

Flow

Absentee Smart List Flow Schedule Results

New Campaign Actions View Campaign Members

Collapse All Expand All

1 - Change Program Status

Program: RC Webinar Demo

New Status: Webinar > No Show

Guidelines to create campaigns for webhook error handling

You can create three additional campaigns to retry the webhook call incase it fails for certain cases. This step is purely optional & you can add/enhance it as per your requirement.

1. Create a trigger campaign “Webhook Error Handling”. This campaign will find whenever an error occurs in the webhook call & add those people to an error list
 - a. Smart List

Webhook Error Handling Campaign Smart List Flow Schedule Results

New Campaign Actions View Campaign Members

Use ALL filters Collapse All Expand All

Webhook is Called

Add Constraint

Webhook: is RCW Registrant Webhook

Error Type: is not Successful

b. Flow

Webhook error handling Smart List Flow Schedule Results

New Campaign Actions View Campaign Members

Collapse All Expand All

1 - Add to List

Add Choice

List Name: RC Webinar Demo.Webhook error list

2 - Remove from List

Add Choice

List Name: RC Webinar Demo.Registered from Marketo list

2. Create a batch campaign “Call Retry Campaign”. This campaign will execute the campaign “Retry Webhook Call” for all the people added to the error list. You can schedule it daily or as per your requirement.

a. Smart List

Call Retry Campaign Smart List Flow Schedule Results

New Campaign Actions View Campaign Members

Use ALL filters Collapse All Expand All

1 - Member of List

Person: in RC Webinar Demo.Webhook error list

b. Flow

Call Retry Campaign	Smart List	Flow	Schedule	Results
<div> New Campaign Actions View Campaign Members </div>				
<div> Collapse All Expand All </div>				
<div> 1 - Request Campaign </div>				
<div> Add Choice </div>				
Requested Campaign: <input type="text" value="RC Webinar Demo.Retry Webhook Call"/>				

3. Create a trigger campaign “Retry Webhook Call”

a. Smart List

Retry Webhook Call	Smart List	Flow	Schedule	Results
<div> New Campaign Actions View Campaign Members </div>				
<div> Use ALL filters Collapse All Expand All </div>				
<div> Campaign is Requested </div>				
<div> Add Constraint </div>				
Source: <input type="text" value="is"/> <input type="text" value="Marketo Flow Action"/>				
Note: Enter a memorable and well-defined campaign description				

b. Flow

Retry Webhook Call	Smart List	Flow	Schedule	Results
<div> New Campaign Actions View Campaign Members </div>				
<div> Collapse All Expand All </div>				
<div> 1 - Call Webhook </div>				
<div> Add Choice </div>				
Webhook: <input type="text" value="RCW Registrant Webhook"/>				
<div> 2 - Add to List </div>				
<div> Add Choice </div>				
List Name: <input type="text" value="RC Webinar Demo.Registered from Marketo list"/>				
<div> 3 - Change Program Status </div>				
<div> Add Choice </div>				
Program: <input type="text" value="RC Webinar Demo"/> <input type="text" value="New Status: Webinar > Registered"/>				

Accessing Program member data in Marketo

Follow the below steps to access the program member data in Marketo

1. Go to the Marketing activities section.
2. Select the Program for which you want to see the program members.
3. Click on the members tab.
4. By default certain fields will be present in the member section.
5. You can create your own view to add or remove certain fields.

UAT Program 1 Assets Setup My Tokens Members							
New ▼ Event Actions ▼ Change Status ▼ Select All Import Members							
Filter: All Statuses ▼ View: RC Webinar View ▼							
ID	Status	Full Name	RC Webinar Join Time	RC Webinar Leave Ti...	RC Webinar Unique Join URL	Email	
1766930	Registered	Aparna Agrawal...				aparna.agrawal+1708@ri...	
1766933	Registered	Aparna Agrawal...				aparna.agrawal+1814@ri...	
1766934	Registered	Aparna Agrawal...				aparna.agrawal+1627@ri...	
1766935	Registered	Aparna Agrawal...				aparna.agrawal+1647@ri...	
1766938	Registered	Aparna Agrawal...				aparna.agrawal+1701@ri...	
1766946	Registered	Aparna Agrawal...			https://v.ops.ringcentral.com/...	aparna.agrawal+1131@ri...	

UAT Program 1 Assets Setup My Tokens Members							
New ▼ Event Actions ▼ Change Status ▼ Select All Import Members							
Filter: All Statuses ▼ View: RC Webinar View ▼							
ID	Status	Full Name	RC Webinar Join Time	RC Webinar Leave Ti...	RC Webinar Unique Join URL	Email	
1766930	Registered	Aparna Agrawal...				aparna.agrawal+1708@ri...	
1766933	Registered	Aparna Agrawal...				aparna.agrawal+1814@ri...	
1766934	Registered	Aparna Agrawal...				aparna.agrawal+1627@ri...	
1766935	Registered	Aparna Agrawal...				aparna.agrawal+1647@ri...	
1766938	Registered	Aparna Agrawal...				aparna.agrawal+1701@ri...	
1766946	Registered	Aparna Agrawal...			https://v.ops.ringcentral.com/...	aparna.agrawal+1131@ri...	

Create View

Name: *

Hidden Columns

Find...

Activities since Most Recent MQL Date

of Actions

of Active Customers

of Activities

of Cases

of Contacts

of Franchisees / Sub-Agents

of Opportunities

of Orders

\$MRR

(denrecated)donotuse

ADD >>

<< REMOVE

Visible Columns

Find...

ID

Status

Full Name

RC Webinar Join Time

RC Webinar Leave Time

RC Webinar Unique Join URL

Email

CANCEL

CREATE

Discovery of RingCentral Webinar for Marketo

You can discover the integration from the below entry points:

1. RingCentral Webinar for Marketo <[App Gallery Link](#)>
 - a. Visit the above link.
 - b. Click on the Visit Page to navigate to the RingCentral Webinar for Marketo Integration page.
2. Webinar section in RingCentral MVP App
 - a. On the RingCentral MVP app, navigate to the Webinars section.
 - b. Click on the scheduled webinar.
 - c. Click on the Integrations tab
 - d. Click on the RingCentral Webinar for Adobe Marketo Engage.
 - e. You will be navigated to the RingCentral Webinar for Marketo Integration page

Setup for each webinar in RingCentral

Create new mapping

To sync the registration, attendee, and other webinar data from RingCentral Webinar to Marketo & vice versa, each webinar has to be mapped to a Marketo Program.

Prerequisite:

1. You must ensure that a Webinar Admin has done the one-time Integration setup by adding Marketo's clientId, client secret & REST API Endpoint URL. If not, please contact your administrator to complete it before you start to create a webinar-specific mapping.
2. The webinar is already scheduled in RingCentral for which you want to create the mapping with Marketo.

Steps

1. Sign in to [RingCentral Webinar for Marketo](#) with your RingCentral account. You will be taken to the Mappings page.
2. Click on the button Create new mapping on the Mappings page. The New Mapping page will be loaded.
3. Select a webinar from the RingCentral Webinar dropdown. Make sure that the webinar has registration enabled. You can confirm this from the webinar host portal.
4. Select a program from the Marketo Program dropdown. Make sure that the program has the relevant smart campaigns in Marketo.
5. Select from either of the below based on how you want to capture registrations
 - a. RingCentral
 - i. You must select a Marketo smart campaign where you want to receive the registrant data. The smart campaign must have the "Campaign is requested" trigger & source as "Web Service API". For more information on the campaign please refer to the section "Create Campaigns"
 - ii. Create a registration form in the RingCentral webinar host portal for your webinar. And you can invite the people from there.
 - iii. Make sure that you add the required registration questions to the RingCentral registration page & don't add registration form at Marketo.
 - iv. RingCentral will send the registration data to the selected Marketo smart campaign
 - v. RingCentral will pass the standard questions' responses to the lead's standard fields at Marketo & custom questions' responses to the mapped custom object field..
 - b. Marketo
 - i. You must ensure that the Marketo admin has added the webhook as explained in the section "One time setup in Marketo" in the Admin Guide.
 - ii. You must ensure that a smart campaign is created in Marketo in which the above webhook is called as explained in the "Setup for each webinar in Marketo"

- iii. RingCentral webhook will pass the registrant data from Marketo to RingCentral webinars & will add them as registrants to the webinar. It will only pass the first name, last name & emailId from Marketo to RingCentral Webinar.
 - iv. Make sure that you don't add questions to the RingCentral registration page and add registration form at Marketo.
- 6. Select the Marketo campaign from the dropdown in the Attendee section. RingCentral will pass the first name, last name, emailId, join time & leave time of the attendee to the Marketo smart campaign.
- 7. Select from either of the below based on how you want to send the email notifications to the registrants & attendees.
 - a. RingCentral
 - i. RingCentral will send all the email notifications to the registrants & attendees. The types of email notifications will include:
 - 1. Webinar Registration confirmation
 - 2. Webinar Registration cancellation
 - 3. Webinar updated/rescheduled
 - 4. Webinar Canceled
 - 5. Reminder email: One day before
 - 6. Reminder email: Five minutes before
 - 7. Thank you email: One day after webinar
 - 8. "Sorry we missed you" email for absentees: One day after webinar
 - ii. RingCentral will not send the unique join url of the registrants to Marketo.
 - b. Marketo
 - i. RingCentral will not send any of the emails mentioned above.
 - ii. RingCentral will send the unique join URL of the registrants in the program member custom field "RC Webinar Unique Join URL" so that the registration confirmation & reminder emails could be sent from Marketo.
- 8. Select the Marketo custom object from the other webinar data section of the Create Mapping Screen. Also, select the custom fields to sync the specific webinar data with Marketo
- 9. Click on the Create button to finish the mapping creation process.

RingCentral

RingCentral Webinar for Marketo

Help

Olivia ▾

Create new mapping

Get more details on mappings in our [help document](#).

Webinar and Marketo Program

RingCentral webinar *

Whiteboard demo ▾

maps to

Marketo Program * ⓘ

Whiteboard webinar ▾

Registrations

Capture registrations from

☒ RingCentral ⓘ ☐ Marketo

RingCentral

Registrations

map to

Marketo Smart Campaign *

Select a Smart Campaign ▾

Send attendee information

When the webinar ends, RingCentral will send attendee information to Marketo. This includes the attendee's name, email address, and the times they joined and left the webinar.

RingCentral

Marketo Smart Campaign *

Cancel

Create

Create new mapping

Get more details on mappings in our [help document](#).

Webinar and Marketo Program

RingCentral webinar *

Whiteboard demo ▼

maps to

Marketo Program * ⓘ

Whiteboard webinar ▼

Registrations

Capture registrations from

☐ RingCentral ⓘ ☒ Marketo ⓘ

Make sure you have selected the webhook in the corresponding Marketo Smart Campaign Flow. For more details, check out our [help document](#).

Send attendee information

When the webinar ends, RingCentral will send attendee information to Marketo. This includes the attendee's name, email address, and the times they joined and left the webinar.

RingCentral

Attendees ⓘ

map to

Marketo Smart Campaign *

Attended Campaign ▼

Email notifications

Send email notifications from

☐ RingCentral ⓘ ☒ Marketo ⓘ

Emails with unique join link

Registration confirmation email

sent from

Marketo Smart Campaign

Select a Smart Campaign ▼

Other webinar data (optional) ^

Map webinar data to fields in a Marketo custom object

Webinar ▼

RingCentral

Marketo custom object field

Webinar title

maps to

Event title ▼

Webinar date/time

maps to

Select a field ▼

Webinar description

maps to

Event description ▼

Registration questions

maps to


Questions ▼

Delete Webinar Mapping

You can easily delete a webinar mapping. If you wish to update a mapping. You are required to first delete a mapping & then create a new mapping.

Steps to delete a webinar mapping:



1. Sign in to the [RingCentral Webinar for Marketo](#) with your RingCentral account. You will be taken to the Mappings page.
2. Hover on your webinar & click on the trash icon. You will be asked for confirmation & reason as to why you want to delete a mapping. Mentioning the correct reason will help us improve the product.


RingCentral Webinar for Marketo
[Help](#)
[Olivia](#)

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	

View Webinar Mapping & Data Sync Status

You can easily view the webinar mapping you have created. And also you can see the data sync status on the same page.

Steps to view webinar mapping & data sync status:

1. Sign in to the [RingCentral Webinar for Marketo](#) with your RingCentral account. You will be taken to the Mappings page.
2. Click on your webinar. You will be taken to the mappings detail page.
3. On the mapping details page, you can see all the options you have selected before.
4. You can also see the data sync status under the heading Sync status.
5. The sync status message for each of the below sections will only appear when the webinar ends. You can hover on the information icons to view the sync status messages as per the below conditions.
 - a. Registrations
 - i. Full success: "Data synced"
 - ii. Partial failure: "Some registration data didn't sync from [Marketo/RingCentral] to [RingCentral/Marketo]. Contact support."
 - iii. Complete failure: "Registrations didn't sync from [Marketo/RingCentral] to [RingCentral/Marketo]. Contact support."
 - b. Attendees - The Attendees' data will take some additional time to sync post the webinar ends.
 - i. Full success: "Data synced"
 - ii. Partial failure: "Some attendees' didn't sync from RingCentral to Marketo. Contact support."
 - iii. Complete failure: "Attendees didn't sync from RingCentral to Marketo. Contact support."
 - c. Email notification (Join url Sync from RingCentral to Marketo)
 - i. Full success: Data synced
 - ii. Partial failure: The join URL for some registrants didn't sync from RingCentral to Marketo. Contact support.
 - iii. Complete failure: The join URL didn't sync from RingCentral to Marketo. Contact support.
 - d. Custom object fields data sync
 - i. Full success: Data synced
 - ii. Partial failure: [data field] didn't sync from RingCentral to Marketo for some registrants. Contact support.
 - iii. Complete failure: [data field] didn't sync from RingCentral to Marketo. Contact support.

6. The standard registration questions' responses are passed to the lead's standard fields automatically. RingCentral Integration will sync the

Other Information

Additional resources can be found as below:

[Admin Guide](#)

[FAQs](#)

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

