

Create an Event with WebEx

Prerequisites

- [Add WebEx as a LaunchPoint Service](#)
- [Create a New Event Program](#)
- Set the appropriate [flow actions](#) to track engagement

First create a Webex Event in the WebEx Event Center. Marketo only uses specific settings and fields for your integration, which we'll go through shortly. Other fields that you might want to configure for WebEx are explained in the [WebEx Event Center guide](#).

Basic Information

- **Event Name** – This name will be viewable in Marketo.
- **Unlisted Checkbox**
 - It's recommended that you do **not** list your event. This will ensure that all people register through your Marketo landing page. People who register through a mechanism other than Marketo will be displayed in Marketo after the event is concluded AND only if they attended the event.
 - If you choose to list the event, it will appear on the List of Events page for anyone who visits your Event Center website.
- **Registration** – Check this box to set to “required.” You'll use a Marketo form/landing page to capture registration information that will be pushed to WebEx.
- **Event Password** – (optional) If you use this field be sure to include it in your confirmation email!

Schedule an Event

Basic Information: Asterisks (*) indicate required values.

* Event type:	OS Eval 4x20	Event Template:	[Event Center Default]
* Event name:	Excellent Webinar		
	<input type="checkbox"/> Listed on public calendar		
	<input type="checkbox"/> Delete from My Meetings when completed		
Registration:	<input checked="" type="checkbox"/> Required		
* Event password:	<input type="password"/>		The password must be at least 6 characters.
* Confirm password:	<input type="password"/>		
Program:	Select a program		Add a new program

Date & Time

- **Start date** – Enter your start date. This will be viewable in Marketo.
- **Start time** – Enter your start time. This will be viewable in Marketo.
- **Estimated duration** – Specify the duration of the event. This will be viewable in Marketo.

- **Time Zones** – Enter the applicable time zones. They will be viewable in Marketo.

Date & Time:

* **Start date:** July 28 2015

* **Start time:** 10 15 am pm [Plan event time zones...](#)

Estimated duration: 1 hour 00 minutes

* **Time zones:** San Francisco (Pacific Daylight Time, GMT-07:00)
None
None
None

Attendees can join 0 minutes before the scheduled start time

Attendees can also connect to audio conference

Email reminder: Send me a reminder email None minutes before event starts

Audio Conference Settings

These settings reside in WebEx only. They are not used by or viewable in Marketo, but they may be important for your webinar, so double-check them!

Event Description & Options

The following options are used by or viewable in Marketo. Other fields reside in WebEx only.

- **Description** – Enter a description. This will be viewable but not modifiable in Marketo.
- **Post-event survey** – Marketo isn't able to capture the information on a WebEx post-event survey at this time.
- **Destination URL** – (optional) You can enter the URL of a Marketo landing page to serve as the destination URL to display after the session ends.

Event Description & Options:

Description: This description is viewable but not editable in Marketo. 

Host image: [Upload](#) a picture of yourself or the presenter

Event material: [Upload](#) event material for attendees to download before event starts

UCF autoplay options: Display a UCF file or URL when the first attendee joins this event. Click Add to select a UCF file or type a URL in the text box.

[Add](#) | [Remove](#)

Start automatically Continuous play

Advance page every

Allow attendees to control file

Other UCF options: Do not allow attendees to share rich media files in this event

Request attendees to verify rich media players

Who can view the attendee list: All participants

Only the host, presenter, and panelists

Post-event survey: [View survey](#)

Do not display survey to attendees

Display survey in pop-up window

Display survey in main browser window (instead of destination URL)

Destination URL after event:

Attendees & Registration

You will be controlling the invitation list, registration form, and other emails using a Marketo Event. Other functionality will not be supported by Marketo, including:

- **Maximum number of registrants** – Currently **not** supported using the Marketo-WebEx integration. Manual approval of registrants is available using the Pending Approval progression status in Marketo.
- **Registration ID required** – Currently supported using the Marketo-WebEx integration. You can use Marketo to send out the confirmation email for your event. When the person registers, they receive a unique URL that they use to enter the event.

Tip

To populate your confirmation email with this unique URL, use the following token in your email: `{{member.webinar url}}`. When the confirmation URL is sent out, this token automatically resolves to the person's unique confirmation URL.

Set your confirmation email to **Operational** to ensure that people who register and may be unsubscribed still receive their confirmation information.

- **Registration Password** – (Optional) Currently not supported using the Marketo-WebEx integration.
- **Approval Rules** – Currently not supported using the Marketo-WebEx integration. However, you can use smart campaigns in Marketo to control approvals.

Attendees & Registration:

Attendees: [Create invitation list](#)
[View invitation list](#)

Invite friends: Allow registrants to invite friends to this event

Maximum number of registrants:

Registration form: Click [here](#) to customize your questions

Destination URL after registration:

Registration ID required: Yes No

Registration password: Yes, specify password:

No

Approval required: Yes No [Set up approval rules](#)

Presenters & Panelists

The information configured in this section is not passed to Marketo.

Email Messages

You'll use Marketo to send out emails to your registrants, confirmation emails, etc. You don't need to configure anything in this section. Disable (uncheck) the email message options within WebEx.

Email Messages:

Email format: Plain Text HTML Include iCalendar Attachments

Invitation emails: [Attendees](#) | [Panelists](#)

Registration emails: [Pending](#) [Approved](#) [Rejected](#) | [Event In Progress](#)

Event updated emails: [All Approved Registrants](#) | [All Attendees](#) | [All Panelists](#)

Reminder emails: [1st Reminder](#)

July 28 2015 10 15 am pm

[2nd Reminder](#)

July 28 2015 10 15 am pm

Follow-up emails: [Thank You for Attending](#)

July 28 2015 11 15 am pm

[Absentee Follow-Up Email](#)

July 28 2015 11 15 am pm

Note

The Marketo-WebEx integration cannot support sending confirmation emails out of WebEx. The confirmation must be sent via Marketo. After you've scheduled the event, be sure to copy the event information to the Marketo confirmation email and set the email as **Operational**.

Now we're ready to jump into Marketo!

1. Select the event you created. Open the **Event Actions** drop-down. Choose **Event Settings**.

Marketing Activities...

- Marketing Activities
 - **Example MKTO Programs
 - My Learning -RC
 - Passport - Dynamic Content
 - Webinars - May
 - BrightTalk Examples
 - WebEx Examples**
 - _Archive
 - My Learning - Amazon
 - My Learning - Courtney McAra
 - My Learning - WBK3

WebEx Examples Assets Setup

New

View: Sched

Sun

16 17

Event Actions

Schedule

Reschedule Entries

Event Settings

Salesforce Campaign Sync

Clone

Delete

Refresh from Webinar Provider

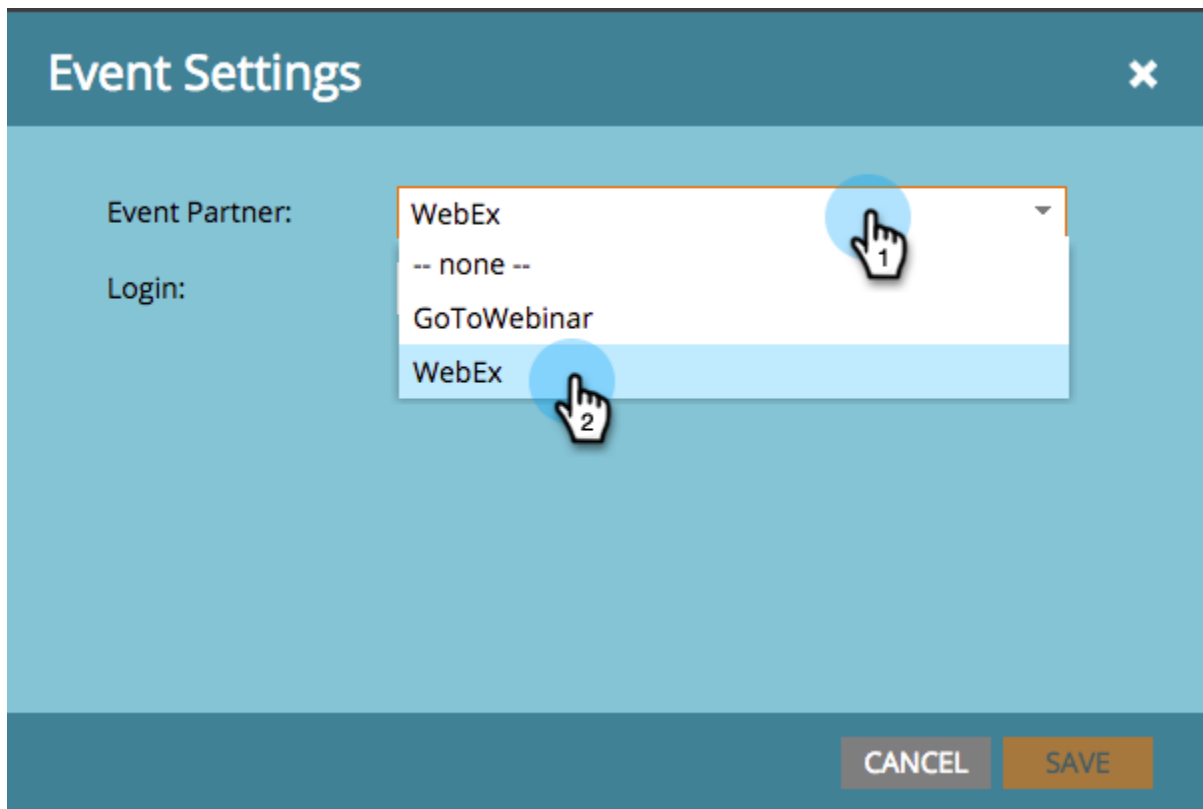
Show Import Status

Show Export Status

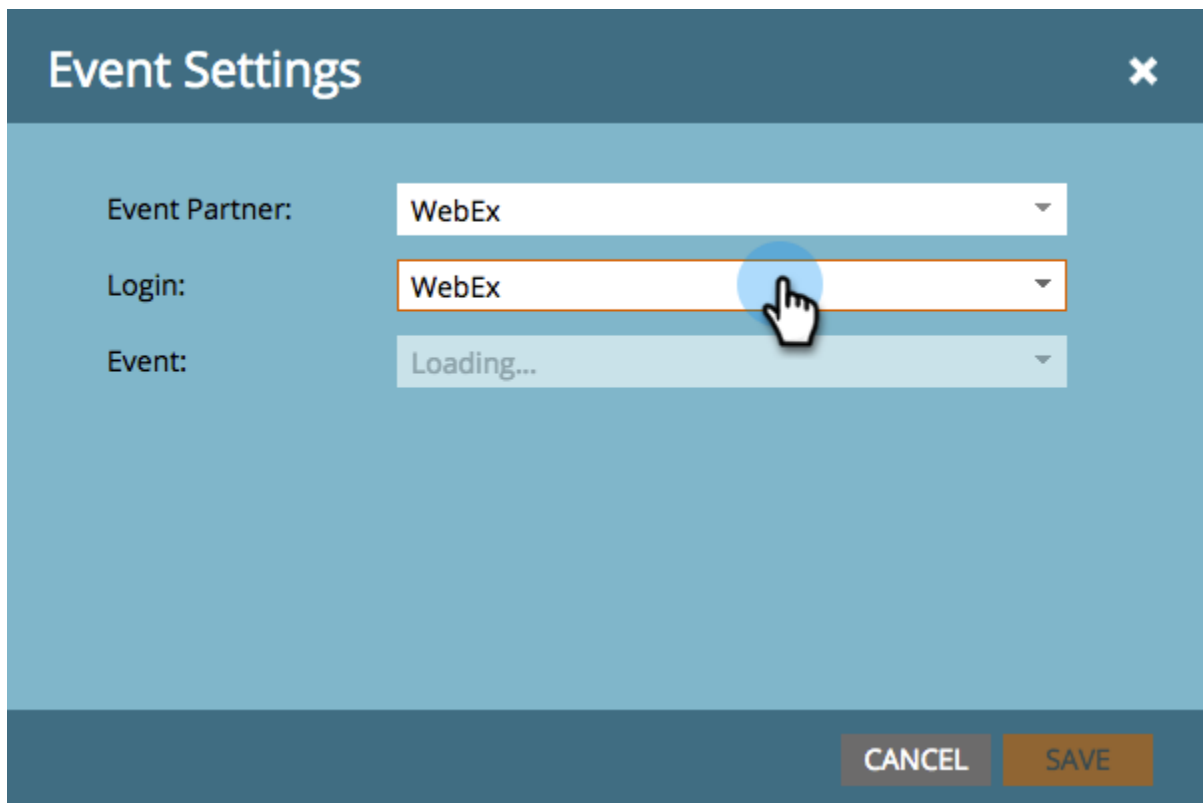
Note

The channel type of the event selected must be **webinar**.

2. Under **Event Partner**, select **WebEx**.



3. Under **Login**, choose your WebEx login.



4. Under **Event**, choose your freshly created WebEx event. Then, select an optional Back-up Page and click **Save**.

Event Settings [X]

Event Partner: WebEx

Login: WebEx

Event: Peter WebEx Demo (345169370)

Back-up Page: Webinar.Registration

Name: Peter WebEx Demo

Start Date: Saturday, August 29, 2015 1:00 PM

End Date: Saturday, August 29, 2015 1:15 PM

CANCEL SAVE

5. Select an optional Back-up Page for your WebEx event. Choose from the drop-down of approved Marketo landing pages or enter the URL of a non-Marketo landing page.

Tip

Set a Back-up Page to direct a member to a specific page if they click on their custom event URL prior to the event's start time.

Sweet! Your WebEx event is now synced with your Marketo event.

Note

The fields Marketo sends over are: First Name, Last Name, Email Address.

People who sign up for your webinar will get pushed to your webinar provider via the Change Program Status flow step when the New Status is set to "Registered." No other status will push the person over. Also, be sure to make Change Program Status flow step #1, and Send Email flow step #2.

WebEx Examples SC Smart List **Flow** Schedule Results

New Campaign Actions View Campaign Members

Collapse All Expand All

1 - Change Program Status

Program: WebEx Examples New Status: Webinar > Registered

2 - Send Email

Email: WebEx Examples.Confirmation Email



Caution

Avoid using nested email programs to send out your confirmation emails. Use the event program's smart campaign instead, as shown above.



Tip

It can take up to 48 hours for the data to appear in Marketo. If after waiting that long you still don't see anything, select **Refresh from Webinar Provider** from the Event Actions menu in the **Summary** tab of your event.

Viewing the Schedule

In the [program schedule view](#), click the calendar entry for your event. You can see the schedule on the right side of the screen!

View: Schedule ▾

▲
Aug 9 - 29, 2015 ▾
▼

Sun	Mon	Tue	Wed	Thu	Fri	Sat
Aug 9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

WebEx Examples

Type: Webinar

Date: ★ 08/29/15 10:00 AM ▾

End: 08/29/15 10:15 AM ▾

Time Zone: America/Los_Angeles

Parent Program: [WebEx Examples](#)

CONFIRMED

Details

Event Partner: WebEx

Event Status: Scheduled_Event

Event Description:

3 Weeks | Month | Overlay | Details ▾ ◀ ▶



Note

To change your event schedule you'll need to edit the webinar on WebEx.