

How to Connect Brainshark, Salesforce.com, and ExactTarget

Overview

This document outlines how to incorporate Brainshark presentations into ExactTarget campaigns and connect the Views back to Salesforce.com.

Requirements

1. A Brainshark Administrator, an ExactTarget Administrator, and a Salesforce.com Administrator should all be available to complete the setup.
2. You must have one of the following Salesforce.com Editions: Professional, Enterprise, Unlimited
3. You must have the Brainshark-Salesforce.com connector, and if you have not already installed this, please do so before proceeding:
 - **Enterprise/Unlimited Brainshark Editions:** [Brainshark/Salesforce Connector Installation Instructions](#)
 - **Other Brainshark Editions:** [Purchase the Brainshark/Salesforce Connector](#)
4. It is required that you have the ExactTarget-Salesforce.com integration.

Need Help?

- Visit our [Help & Training](#) site.
- Contact our support team at support@brainshark.com or 781.370.8222. They are available weekdays, 8 AM – 9 PM ET.

Part I (General Information): How to Connect Brainshark Viewing Data to Salesforce.com Records

To integrate a Brainshark view with Salesforce.com, and tie viewing data back to the appropriate Contact/Lead records in Salesforce.com, you'll use Tracking Codes. This section will discuss the codes available and the options you have for their combination, depending on the data you would like added to the record.

1. View the following presentation so you will understand the URL tracking codes that you will have to setup in your ExactTarget emails:
<http://www.brainshark.com/ayoung/campaigns?sld=12>
2. Review the codes that will be added to the end of a Brainshark Presentation URL and will return the data listed:

&int1= the ID of the "Sender" (e.g. SFDC user/Record Owner)

&int2= the ID of a Lead/Contact

&int3= the ID of a Campaign

"ID": Refers to the unique ID that Salesforce.com creates for every record in the system. In SFDC, this ID can be found in the hyperlink used to access a record; it can also be reported on (e.g. Lead ID, Contact ID, User ID, Campaign ID).

"&tx=": This generic Brainshark 'text' tracking code can be appended to any Brainshark link, even those not integrated with SFDC, to track a unique viewer. When you add this code to the Brainshark presentation URL, you supply the information you'd like returned to you when the link is clicked. We frequently use the recipient's email address.

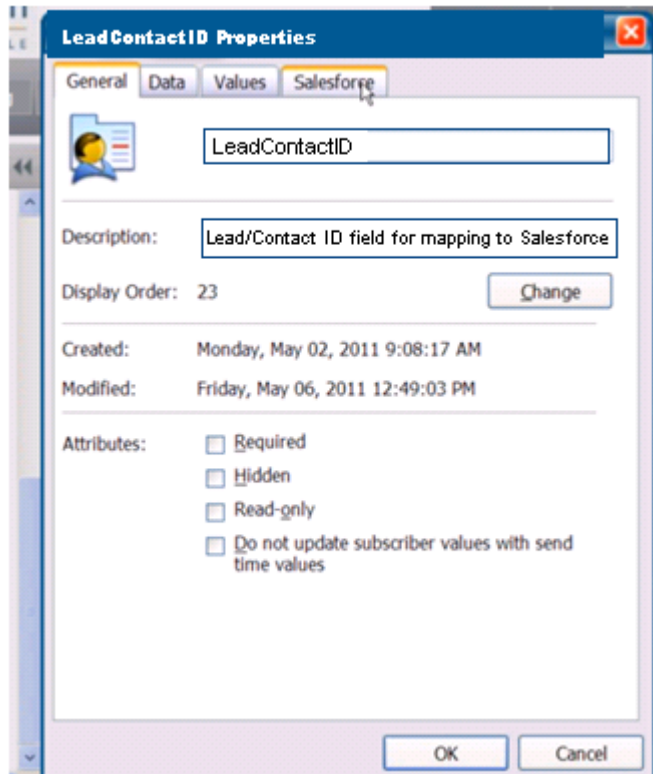
Using these codes, your completed link will look something like the example below, but it will be **unique for each recipient**. In this case, the recipient is "creinhold@brainshark.com".

<http://www.brainshark.com/brainsharkinc/vu?pi=765571670&tx=creinhold@brainshark.com&int2=00Q3000000F1sL&int3=7013000000DXta&int1=00530000000sAmc>

Part II (ExactTarget Specific):

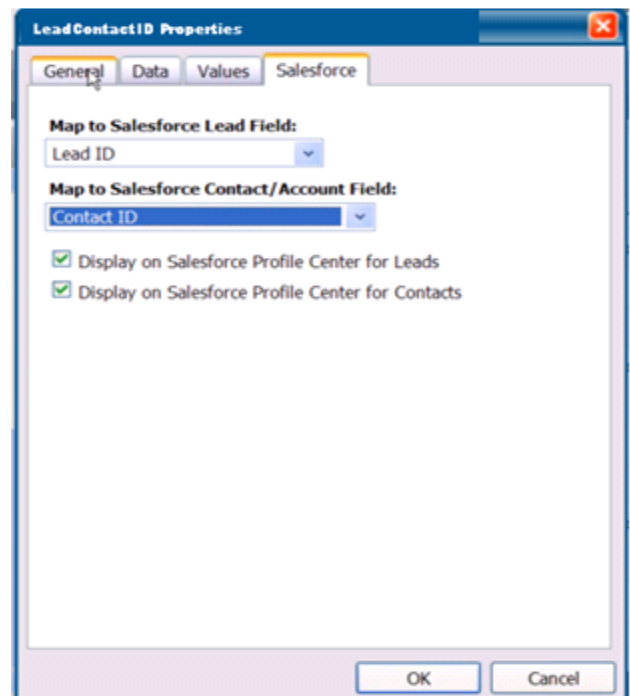
How to Connect Brainshark Viewing Data from ExactTarget emails, to Salesforce.com

Create a new field in ExactTarget that captures the Lead/Contact ID from Salesforce.com. In this example, we call the field **LeadContactID**.



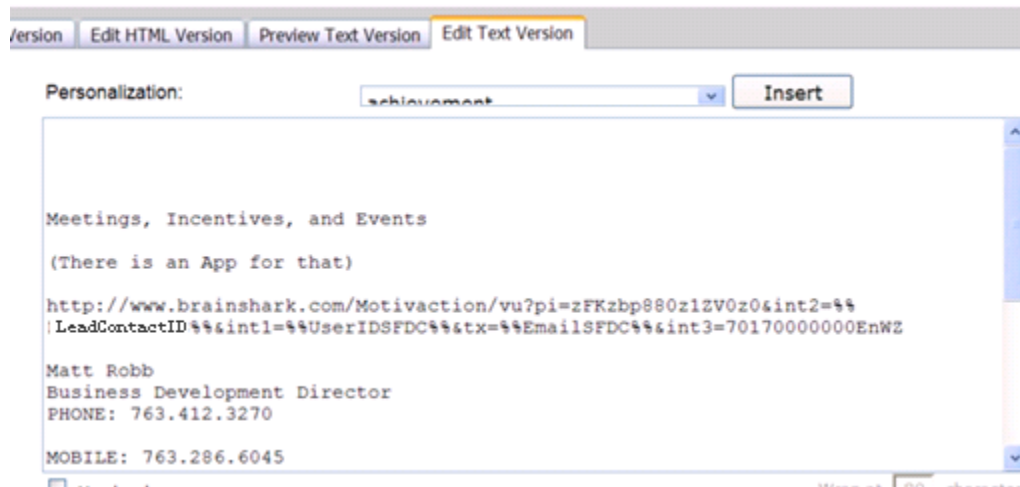
Select the “Salesforce” tab, and map this field as follows:

- Map to Salesforce Lead Field → **Lead ID**
- Map to Salesforce Contact Field → **Contact ID**
- Check off the box “Display on Salesforce Profile Center for Leads”
- Check off the box “Display on Salesforce Profile Center for Contacts”



Also, create a new field for the Lead/Contact Owner ID if you require this to be a dynamic token, i.e. to change according to the lead owner. In the case of this example, we require the owner to be fixed as it is for the purposes of an email blast, so we will hard code the Owner Id.

Create the email in ExactTarget as usual. Create a link to the Brainshark presentation.



Initially, this URL will have a format similar to:

<http://www.brainshark.com/Motivaction/vu?pi=zHUz9lyFSz1afXz0>

You now need to append the tokens that Brainshark requires to the URL. The owner Id in our case is fixed so we add it as follows:

<http://www.brainshark.com/Motivaction/vu?pi=zHUz9lyFSz1afXz0&int1=0052000000mrsY>

Then you need to add the token for the Id field that we created above. It maps to the int2 URL query string:

<http://www.brainshark.com/Motivaction/vu?pi=zHUz9lyFSz1afXz0&int1=0052000000mrsY&int2=%%LeadContactID%%>

The string %%LeadContactID%% is the token that ExactTarget inserts for the custom field LeadContactID.

If you would like to connect the Brainshark View data to a specific campaign, you can insert that fixed campaign ID after the int3= code. We add it as follows:

<http://www.brainshark.com/Motivaction/vu?pi=zHUz9lyFSz1afXz0&int1=0052000000mrsY&int2=%%LeadContactID%%&int3=7017000000EnWZ>

Finally, you can add the tracking query string (&tx=) if you require it. In the example we are using the email address, which is available in ExactTarget and so does not require a formula field to use it. The final URL looks something like this:

<http://www.brainshark.com/Motivaction/vu?pi=zHUz9lyFSz1afXz0&int1=00520000000mrsY&int2=%LeadContactID%%&int3=70170000000EnWZ&tx=%EmailSFDC%>

To test your campaign, go to Salesforce and send a test ExactTarget email. Make sure to select the specific email you just created.

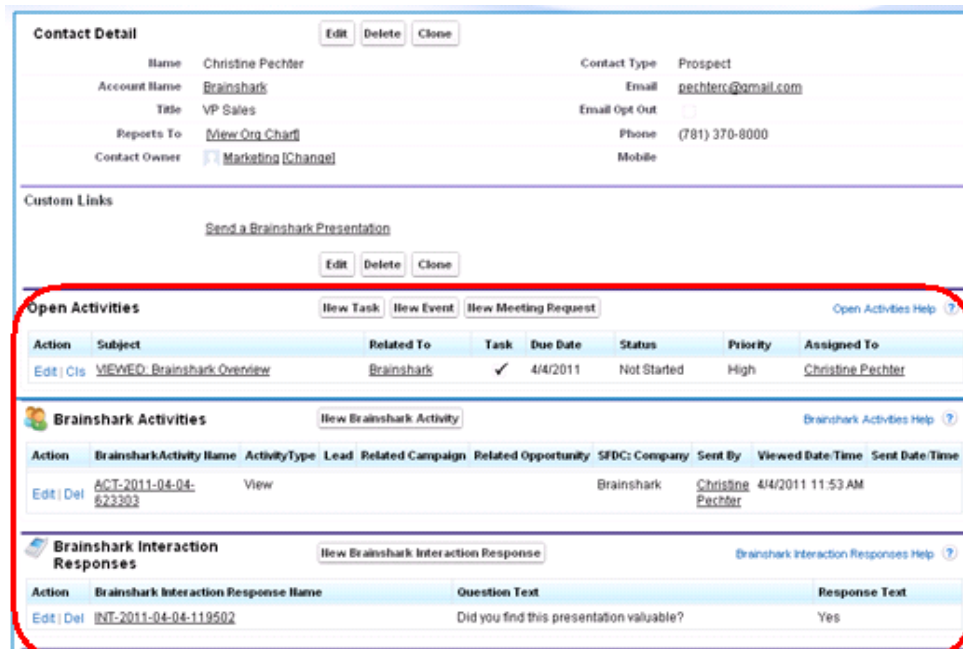


The screenshot shows the Salesforce 'Email Send' interface for a campaign named 'Testing brainshark'. The interface includes a navigation bar with tabs for Accounts, Contacts, Opportunities, Reports, Sales Sharepoint, Dashboards, Contracts, Documents, Campaigns, People, and Profile. Below the navigation bar, there are buttons for 'Send', 'Preview', and 'Cancel', along with an 'Access ExactTarget' link. The main form area is titled 'Email Information' and contains the following fields:

- Salesforce Campaign:** Testing brainshark (with a 'Set Member Status Filter' link)
- Email:** my emails/MotivAction/Meetings, Incentives, & amp, amp, Even (with 'Edit', 'New', and 'View All' links)
- Subject:** TEST 5-10-Meetings, Incentives, and Events (There is an App f (with an 'Insert' dropdown)
- From:** Audrey Retka <aretka@motivaction.com>
- Tracking:** Individual Tracking Results Populated
- Send Time:** Immediately (The email will be sent when you click the Send button) and Later (The email will be sent on the date and time specified below) with a 'Your Local Time' field.
- Opt-In Certification:** I certify all of these people have opted in [View Certification Statement]

At the bottom of the form, there are 'Send', 'Preview', and 'Cancel' buttons.

Once the email has been sent, open the email you receive, and click the Brainshark presentation. Watch several slides, and then close the browser window. Within five minutes, your Brainshark "View" will appear in Salesforce.com – connected to the Lead/Contact record and the Campaign record (if you included this ID in your link).



The screenshot shows the 'Contact Detail' page for Christine Pechter. The page includes sections for 'Contact Detail', 'Custom Links', 'Open Activities', 'Brainshark Activities', and 'Brainshark Interaction Responses'. The 'Open Activities' section is highlighted with a red box and contains the following table:

Action	Subject	Related To	Task	Due Date	Status	Priority	Assigned To
Edit Close	VIEWED: Brainshark Overview	Brainshark	<input checked="" type="checkbox"/>	4/4/2011	Not Started	High	Christine Pechter

The 'Brainshark Activities' section contains the following table:

Action	BrainsharkActivity Name	ActivityType	Lead	Related Campaign	Related Opportunity	SFDC: Company	Sent By	Viewed Date/Time	Sent Date/Time
Edit Del	ACT-2011-04-04-623303	View				Brainshark	Christine Pechter	4/4/2011 11:53 AM	

The 'Brainshark Interaction Responses' section contains the following table:

Action	Brainshark Interaction Response Name	Question Text	Response Text
Edit Del	INT-2011-04-04-119502	Did you find this presentation valuable?	Yes

You can also run reports to surface all views:

4/14/2011 2:13 PM	-	Mobile Apps for Meetings, Incentives, & Events	-		Minutes:60 Seconds:-6	4	100.00%	2,364.47%	-	-
<input type="checkbox"/> CampaignID: 7017000000EnWZ (6 records)										
5/10/2011 9:12 AM	-	Meetings, Incentives, and Events (There is an APP for that)	Matt Robb	Matt Robb	Minutes:0 Seconds:23	2	50.00%	15.75%	-	-
5/10/2011 9:12 AM	-	Meetings, Incentives, and Events (There is an APP for that)	-	Chrissy Pechter	Minutes:0 Seconds:13	3	75.00%	8.90%	-	-
5/9/2011 4:40 PM	-	Meetings, Incentives, and Events (There is an APP for that)	-	Audrey Test	Minutes:0 Seconds:5	3	75.00%	3.42%	-	-
5/9/2011 4:29 PM	-	Meetings, Incentives, and Events (There is an APP for that)	-		Minutes:0 Seconds:42	4	100.00%	28.77%	-	-
4/25/2011 10:41 PM	-	Meetings, Incentives, & Events (There is an APP for that)	Audrey Retika	Audrey 2 Test 2	Minutes:0 Seconds:37	3	75.00%	25.52%	-	-
4/25/2011 10:41 PM	-	Meetings, Incentives, & Events (There is an APP for that)	Audrey Retika	Audrey 2 Test 2	Minutes:0 Seconds:37	3	75.00%	25.52%	-	-
Grand Totals (23 records)										