

How to Connect Brainshark, Salesforce.com, and Marketo

Overview

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

Requirements

1. A Brainshark Administrator, a Marketo 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 Marketo-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 Marketo 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.

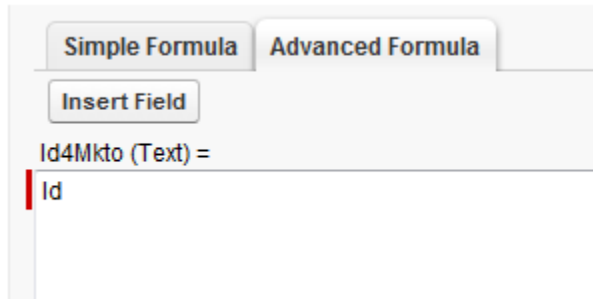
Using these codes, your completed link will look something like the example below, but it will be **unique for each recipient**. In this case, the recipient is "creinhold@brainshark.com".

<http://www.brainshark.com/brainsharkinc/vu?pi=765571670&tx=creinhold@brainshark.com&int2=00Q3000000F1IsL&int3=70130000000DXta&int1=00530000000sAmc>

Part II (Marketo Specific):

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

Create a formula field of type text in SFDC to capture the lead/contact ID. In this example, we call this field <Id4Mkto>. You need to create this field for both Leads and Contacts and name it exactly the same for both. The formula for the field is simply Id:

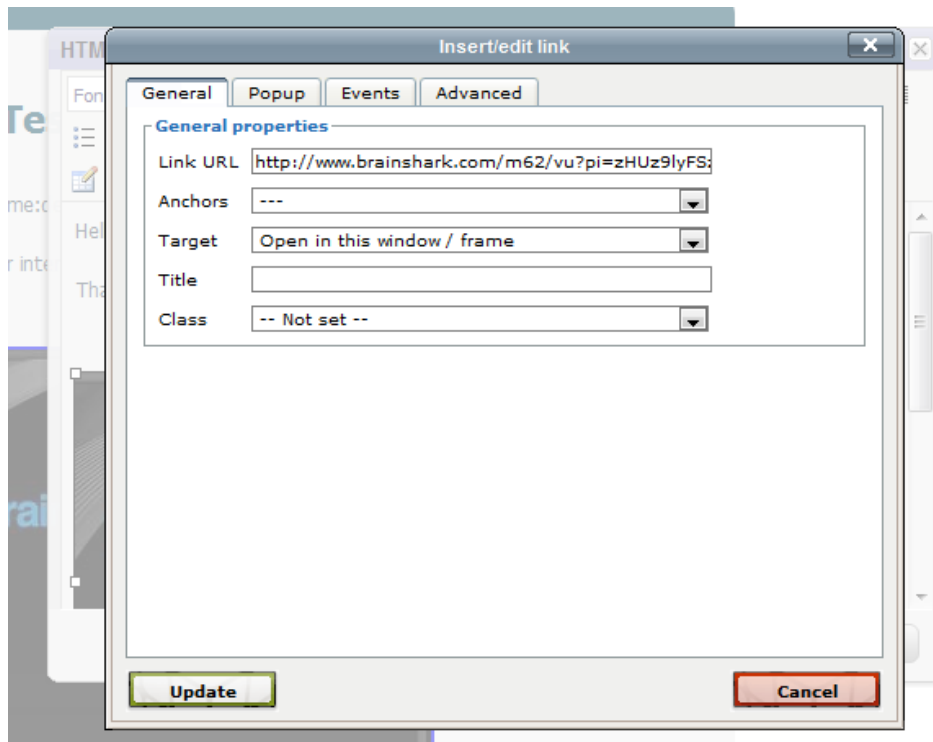


The screenshot shows the Salesforce formula editor interface. At the top, there are two tabs: 'Simple Formula' (selected) and 'Advanced Formula'. Below the tabs is an 'Insert Field' button. The main area shows a text input field with the label 'Id4Mkto (Text) =' and the formula 'Id' entered. A red vertical bar is visible on the left side of the formula input area.

Once you have done this, Marketo will automatically create a sync field that maps to both of these formula fields.

Also, create one 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 Marketo as usual. Create a link to the Brainshark presentation.



The screenshot shows the 'Insert/edit link' dialog box in Marketo. The 'General' tab is selected, and the 'General properties' section is visible. The fields are: Link URL (http://www.brainshark.com/m62/vu?pi=zHUz9lyFS;), Anchors (---), Target (Open in this window / frame), Title (empty), and Class (-- Not set --). At the bottom, there are 'Update' and 'Cancel' buttons.

Initially, this URL will have a format similar to:

<http://www.brainshark.com/m62/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/m62/vu?pi=zHUz9lyFSz1afXz0&int1=00520000000mrsY>

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/m62/vu?pi=zHUz9lyFSz1afXz0&int1=00520000000mrsY&int2={{Id4Mkto}}>

The string `{{Id4Mkto:default=edit me}}` is the token that Marketo inserts for the custom field Id4Mkto. You can remove the `:default=edit me` portion as this would not be at all useful as a query string, should the field be blank.

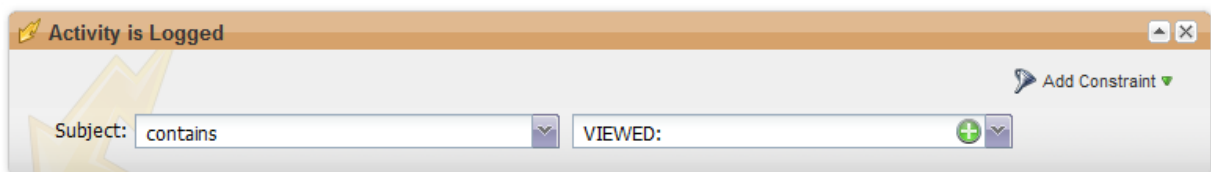
Once you add a Marketo token and Update the link, Marketo will URL encode the token, so the `{{` will be replaced by `%7B%7B` and the `}}` will be replaced by `%7D%7D`. Leave it like this, it is correct.

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

<http://www.brainshark.com/m62/vu?pi=zHUz9lyFSz1afXz0&int1=00520000000mrsY&int2=%7B%7BId4Mkto%7D%7D&tx=%7B%7BEmail%20Address%7D%7D>

You can create interesting moments in Marketo for Brainshark views that are tracked in Salesforce activities but you cannot track Brainshark Activity records in Marketo so you will not be able to get that level of detail in Marketo Sales Insight.

To create an Interesting Moment, the smart list in Marketo should fire on a trigger similar to this:



This uses the Salesforce activity log and the view record that Brainshark inserts when a Brainshark is viewed. You may wish to use this for lead scoring in Marketo or any other behavioral analysis.