



Marketo WebEx Adapter

User Guide Version 2.5





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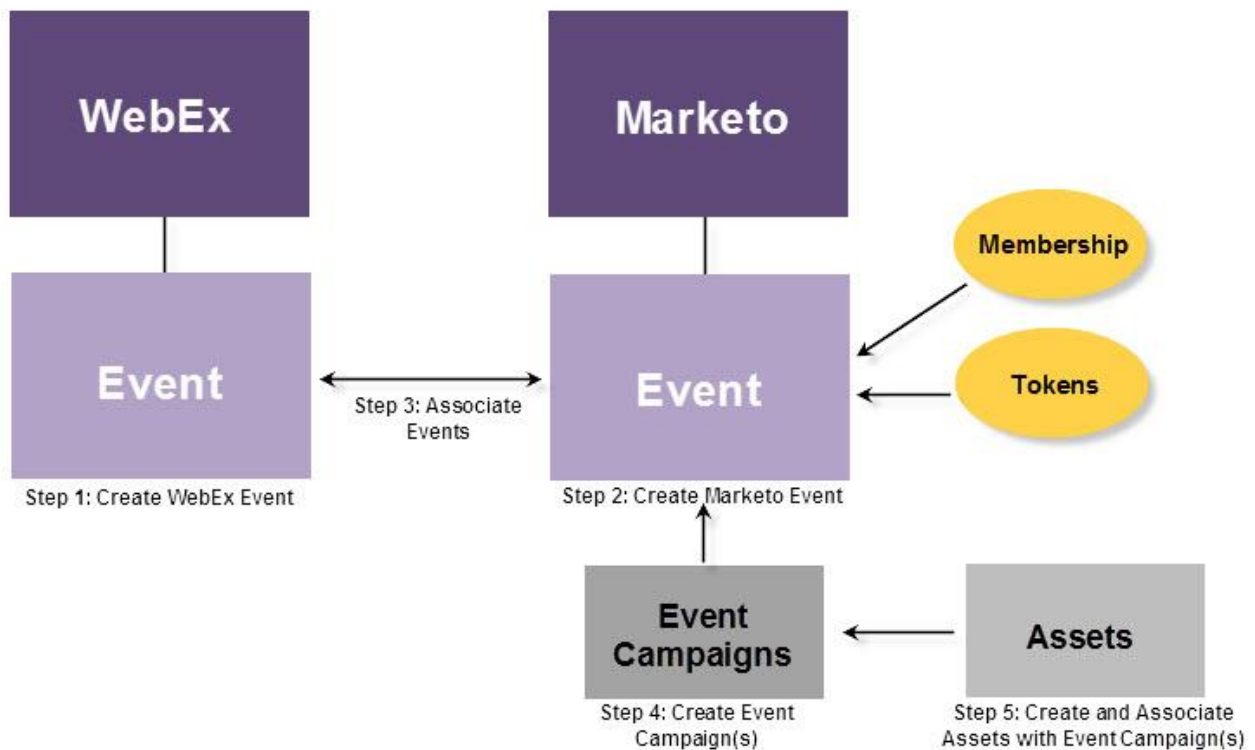


EVENT INTEGRATION

Connect Marketo to WebEx and automate your webinar events with our new WebEx adapter. This adapter will allow you to manage your webinar events, push registration information captured on a Marketo landing page to WebEx, and pull attendance information automatically into a Marketo event. This new event capability allows you to capture the status of the leads as members of the event.

The sections in this guide will step you through the process of creating an event in WebEx, creating an event in Marketo, and associating the events together. The graphic below depicts the integration process.

Event Integration





GETTING STARTED

The following requirements must be met to take advantage of the Marketo WebEx integration:

- **Subscription to WebEx Event Center** – If you do not have a current subscription to WebEx Event Center, please contact WebEx directly. Marketo is not a reseller of WebEx software. **NOTE:** *WebEx Meeting Center and WebEx Training Center are not supported.*
- **WebEx Event Center Connection Settings** – You will be required to enter the following information into Marketo to enable the integration:
 - **Site Name** – The site name can be found at the end of the URL used to log into WebEx. For example,
<https://mycompany.webex.com/mw0300lc/mywebex/default.do?siteurl=mycompany>
 - **Caution:** Do not enter the entire URL in this field; enter the site name only!
 - **User Name and Password** - WebEx User Name and Password for the administrator or host for which you want to import Events.



CREATING AN EVENT IN WEBEX EVENT CENTER

First, you will need to create the WebEx event in WebEx Event Center. Next, from within Marketo, you will associate the WebEx event with a Marketo event, allowing the systems to pass registration and attendance information.

The following is a list of settings that will be used by Marketo. There are additional fields that you will configure in WebEx that will NOT affect the integration. Please refer to your WebEx User Guide for additional information on those fields, as they will not be covered in this guide.

Basic Information

- **Event Name** – this name will be viewable in Marketo.
- **Unlisted Check Box**
 - It is recommended that you do not list your event. This will ensure that all leads register through your Marketo Landing page. Leads that 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 Web site.
- **Registration:** please check this box to set to “required.” You will 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.

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.

Teleconference – these settings will reside in WebEx only. They are not used by or viewable in Marketo, but they may be important for your webinar.



Event Description & Options – the following options are used by or viewable in Marketo. Other fields will reside in WebEx only.

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

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.

NOTE: Manual approval of registrants is available using the Pending Approval progression status in Marketo (see “Progressions”).

Registration ID required – currently supported using the Marketo-WebEx integration (see “You can use Marketo to send out the confirmation email for your Event. When the lead 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 leads unique confirmation URL.

Reminder: Set your confirmation email to Operational to ensure that people who register, who might be unsubscribed, 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 Marketo Smart campaigns to control approvals.

Presenters & Panelists

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

Email Messages



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

NOTE: The Marketo-WebEx integration cannot support sending confirmation emails out of WebEx. The confirmation must be sent via Marketo.

After you have scheduled the event, be sure to copy the event information to the Marketo confirmation email and set the email to be Operational.

ENTERING WEBEX CREDENTIALS IN MARKETO

ENTERING CREDENTIALS

To use the WebEx adapter, you must first enter in your WebEx credentials.

- Log into Marketo and navigate to the Admin area.
- Click **Event Partners** in the tree, or from the canvas.
- Under Event Partner Actions, click **New Event Partner**. The New Event Partner dialog displays.
 - a. **Event Partner** – select WebEx.

NOTE: We will be adding additional webinar providers in the future.
 - b. **Username** – enter the username you use to log into WebEx Event Center.
 - c. **Password** – enter the password you use to log into WebEx Event Center.
 - d. **Site Name** – enter the site name for your WebEx Event Center Account (see “Getting Started” for additional information).
- Click **Create** to continue, or **Cancel** to close the dialog box.



New Event Partner Webex 2 ✕

Event Partner: * ▾

Username: *

Password: *

Site Name: *



MARKETO WEBEX ADAPTER USER GUIDE

- If the credentials are successfully validated, they will be added to grid. If there is an error with one of the settings, you will not be able to save the credentials. The below figure is pointing to the icon that shows successfully added credentials.



Credentials	Partner Name	Used by Events	
michael	Webex	<u>2</u>	
cchavez	Webex	<u>2</u>	
sgupta	Webex	<u>2</u>	

- If you update your password in WebEx, YOU MUST update your password in Marketo as well. If you do not, the integration will fail and you will see an error message in Event Partners.

EDITING A CREDENTIAL

If your password expires or you need to make a change to an existing credential, follow these steps:

1. Select the credential you wish to edit from the grid.
2. Under Event Partner Actions, select **Edit Event Partner**.
3. Update the information on the Edit Event Partner dialog.
4. Click **Save** to update the information, or click **Cancel** to close the window without saving the changes.

DELETING A CREDENTIAL

To remove a set of credentials from use within Marketo, follow these steps:

1. Select the credential you wish to delete from the grid.
2. Under Event Partner Actions, select **Delete Event Partner**.
3. Click **Delete** to remove the credentials, or click **Cancel** to cancel the request.



CREATING YOUR FIRST MARKETO EVENT

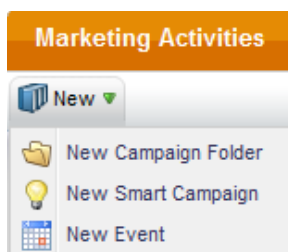
There are multiple steps involved in creating your Marketo Event. Please use this as a guideline for the most efficient way to build your Marketo Event. The following will be covered:

1. Create the Marketo Event
2. Associate the Marketo Event to the WebEx event
3. Create Event campaigns
4. Create the Assets that will be used in the flow of your campaign

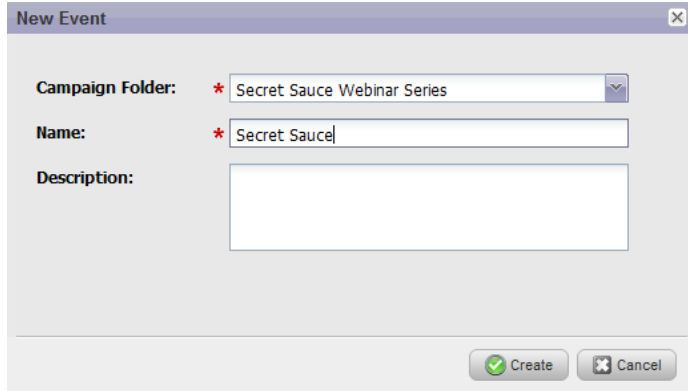
CREATING AN EVENT IN MARKETO

A Marketo Event is a program that allows you to track the progression of your leads through the program. It will push registration information and pull attendance information using the WebEx adapter. The Event will capture the status of your leads as they progress through the Event.

1. From Marketing Activities, click **New**.



2. Select **New Event**.
3. Select the Campaign Folder in which the Event will live.
CAUTION: Each event *must* live within a Campaign folder. Events cannot live outside of a folder.
4. Enter a name (required).
NOTE: Once the name is entered, it cannot be changed.
5. Enter a description (optional).
6. Click **Create** to add the event to the tree.
7. Click **Cancel** to go back.



NOTE: An Event will live inside a campaign folder. Multiple Events can live within a folder; however, an Event cannot live within another Event.

EDITING AN EVENT

To make changes to the Event, select the Event from the tree. From here you can edit the schedule, Event Settings, campaigns, etc.

NOTE: You cannot change the name of an Event.

CLONING AN EVENT

You can clone an Event, including all the event child campaigns, and local assets. This will allow for easy re-use of existing events with the same or similar structure. For additional information, please see the articles on [Cloning an Event](#) and [My Tokens](#). In the newly cloned event, the WebEx Event will be set to “not set.”

1. Select the Event in the Marketing Activities tree
 - a. Right click on the Event and click **Clone**, OR
 - b. From the secondary menu, click **Event Actions** then click **Clone**.
2. The Clone Event dialog opens.
 - a. **Campaign Folder** - select the Campaign Folder to create the event in, or use the default selection (based on the folder the current event is in).
 - b. **Clone From** – this will be read-only and is based on the Event that was selected in the tree.
 - c. **Name** – enter a name for your new Event. The Event name must be unique in the system.
 - d. **Description** (optional) – enter a description for your event.
3. Click **Save** to create the new Event or click **Cancel** to go back.



DELETING AN EVENT

You can completely remove the Event by deleting the Event. If you have campaigns associated with the Event, you must delete the campaigns first before you can delete the Event.

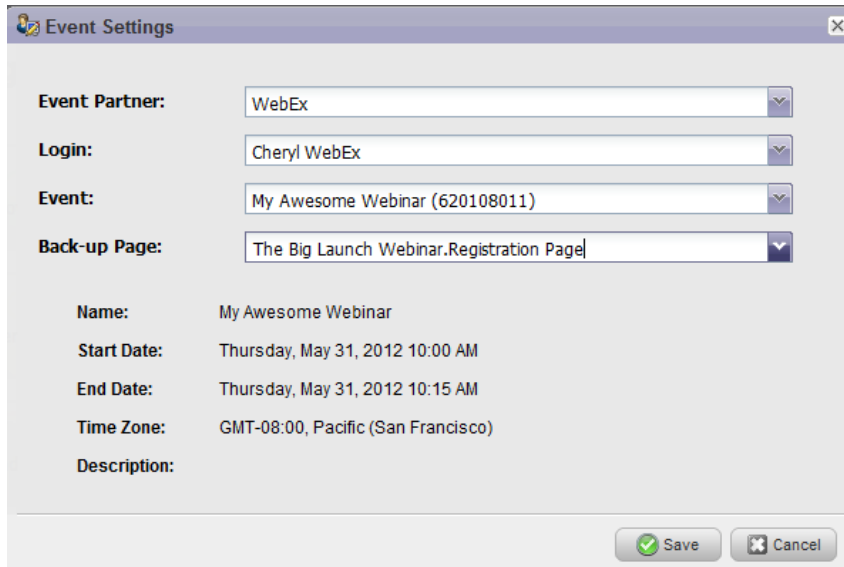
1. To delete an event, select the Event from the tree.
2. Under Event Actions, select **Delete Event**.
3. Click **Delete** to permanently delete the Event.
4. Click **Cancel** to go back.

CONFIGURING EVENT SETTINGS FOR THE EVENT

1. From the Marketing Activities tree, select the Event you wish to associate to a WebEx Event.
2. From the submenu, select **Event Actions** and then select **Event Settings**.
 - a. Select the Event Partner, WebEx.
 - b. Select the login account.
 - c. Select the event (WebEx Event) that you wish to associate with this Marketo Event (once you select the login account, we will pull in all events created under that account).
 - d. Select a Back-up Page for your WebEx event. A list of approved Marketo landing pages displays in drop-down, or you can enter the URL for a non-Marketo landing page.

NOTE: The Back-up page is the page you want the registrant to land on if they click the URL in their confirmation email prior to the webinar beginning. This is a place holder page that only displays if a registrant clicks the link prior to the start of the webinar.
3. Once the event is selected, the start and end date/time, time zone and description (optional) will be displayed.
4. Click **Save** to save the event settings, click **Cancel** to go back.

NOTE: If you update any event information in WebEx, such as the date or time of the event, you must click “Refresh from WebEx” in the Event Actions menu.



The Event Settings dialog box contains the following fields:

- Event Partner:** WebEx
- Login:** Cheryl WebEx
- Event:** My Awesome Webinar (620108011)
- Back-up Page:** The Big Launch Webinar.Registration Page
- Name:** My Awesome Webinar
- Start Date:** Thursday, May 31, 2012 10:00 AM
- End Date:** Thursday, May 31, 2012 10:15 AM
- Time Zone:** GMT-08:00, Pacific (San Francisco)
- Description:** (empty)

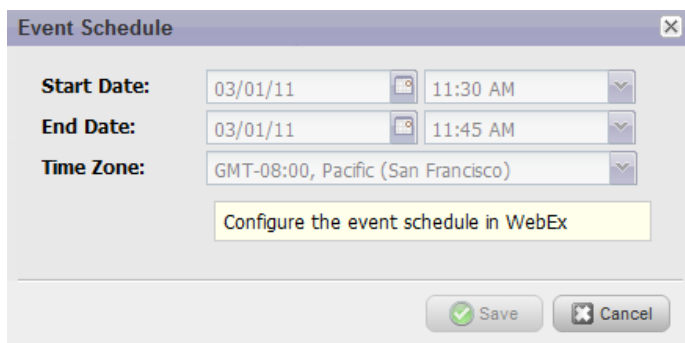
Buttons: Save, Cancel

SETTING THE SCHEDULE

When setting up an Event that is associated with a WebEx, the event schedule will populate with data from WebEx. For other types of Events, such as offline events, you can enter the event schedule.

- From Event Actions, select **Schedule**.
- If you have already associated a WebEx event to the Event in Marketo, the information will be pre-populated from WebEx.

NOTE: If you update any event information in WebEx, you must click “Refresh from WebEx” in the Event Actions menu.



The Event Schedule dialog box contains the following fields:

- Start Date:** 03/01/11 11:30 AM
- End Date:** 03/01/11 11:45 AM
- Time Zone:** GMT-08:00, Pacific (San Francisco)

Buttons: Save, Cancel

Link: [Configure the event schedule in WebEx](#)

EVENT SUMMARY TAB



The Event Summary tab contains information about the Event, including a summary of the settings, the schedule, results, and members by progression status.

Settings

- **Event Partner** – will be set to WebEx. You can update the event settings by clicking the link.
- **Event Status** – information about the status of the event. The following statuses will display:
 - *Scheduled Event* – event is scheduled for a future date.
 - *Waiting for Attendee List* – event end date has passed, but attendee list is not yet available.
 - *Event Complete* – event has concluded and attendee list has been received.
 - *Attendee List Unavailable* – event end date has passed and no attendee list is available.
- **Event Name** – name given to the event when created in WebEx.
- **Event Description** – description entered for the event when created in WebEx.
- **Event Login** – host login information for the person who created the WebEx event.
- **Event Number** – number given to the event when created in WebEx.
- **Channel** – the channel specified when the Marketo Event was created.

Settings	
Event Partner:	WebEx
Event Status:	Scheduled Event
Event Name:	Sample Training Event
Event Description:	This is the description.
Event Login:	cchavez
Event Number:	342 017 462
Channel	Webinar

Schedule

- **Start Date** – start date for the WebEx event. Edit this date in WebEx.
- **End Date** - end date for the WebEx event. Edit this date in WebEx.
- **Time Zone** – time zone selected when the WebEx event was created. This is meant for display purposes.



Schedule

Start Date:	Wednesday, Jul 27, 2011 10:45 pm
End Date:	Wednesday, Jul 27, 2011 11:00 pm
Time Zone:	GMT-05:00, Eastern (New York)

Results

- **Total Members** – the number of leads who are members of the event.
- **Acquired By** – the number of leads who were new or acquired by the event.
- **Success** – the number of leads who reached the success criteria defined for the event. This manual assumes you are using the pre-defined channel “Webinar.” The success statuses are “attended” and “downloaded.”

Results



Total Members	100
Acquired By	0
Success	4



Members by Progression Status

The members by progression status is a count of leads *currently* in the listed status.

Members by Progression Status

Invited	87
Pending Approval	0
Wait Listed	0
Rejected	0
Registered	8
Attended 	4
No Show	1
Downloaded 	0

CREATING EVENT CHILD CAMPAIGNS

Events consist of one or more child campaigns. These child campaigns will all work together to move leads through the statuses and will enable you to track the performance of your Event.

These campaigns cannot be moved out from under the Event. Existing smart campaigns cannot be converted to Event child campaigns at this time.

1. Select the Event in the Marketing Activities tree
2. Right click on the event, and click **New Smart Campaign**.
3. The New Smart Campaign dialog will appear.
 - a. **Name** - enter a name for your new campaign. Note that the name of the campaign that lives in the event has a new naming convention (e.g. NameofEvent.Campaign). When you clone the event (see “Cloning an Event”), you give the event a new name, but the event campaign names can remain the same.
 - b. **Description** - enter a Description (optional) for the new campaign.
 - c. Click **Save** to add the campaign to the Event.
 - d. Click **Cancel** to go back.

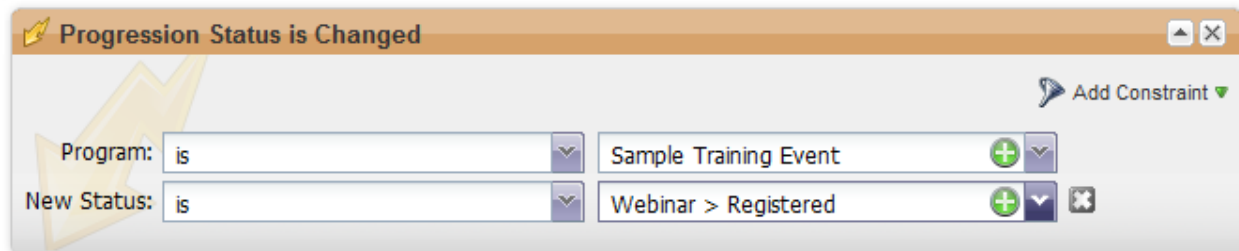
Notice that a new campaign is created as a child to the Event. This campaign belongs to the Event and is solely used by this Event.



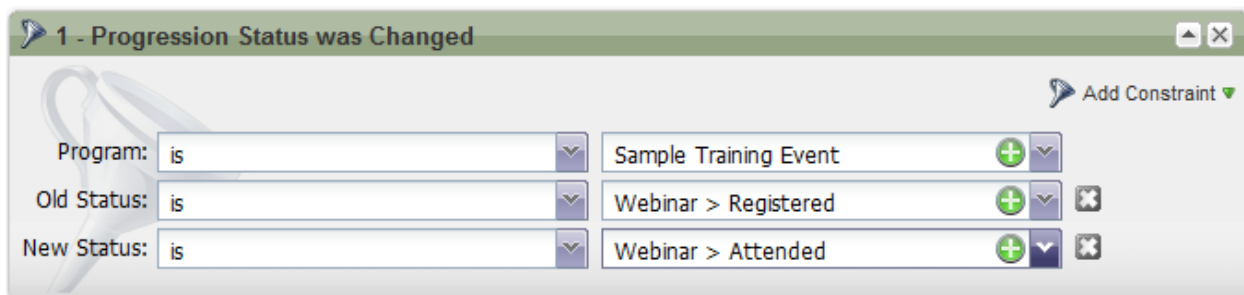
PROGRESSIONS

Progressions represent the different event statuses that a lead will progress through as a member of the Event. See the article on [Progressions](#) for more information. Progressions are associated to a Channel Type. Marketo has a built in Channel Type called Webinar. Statuses can be used in both batch and trigger campaigns.

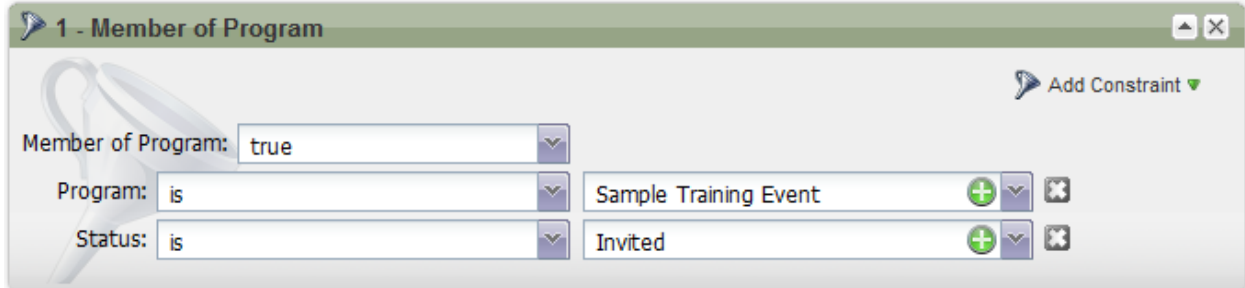
- Trigger – Progression Status is changed – listen for a change in the status.
 - Example: if you are using a pending approval and you manually move leads into the status registered, you could have a campaign listening for this change.



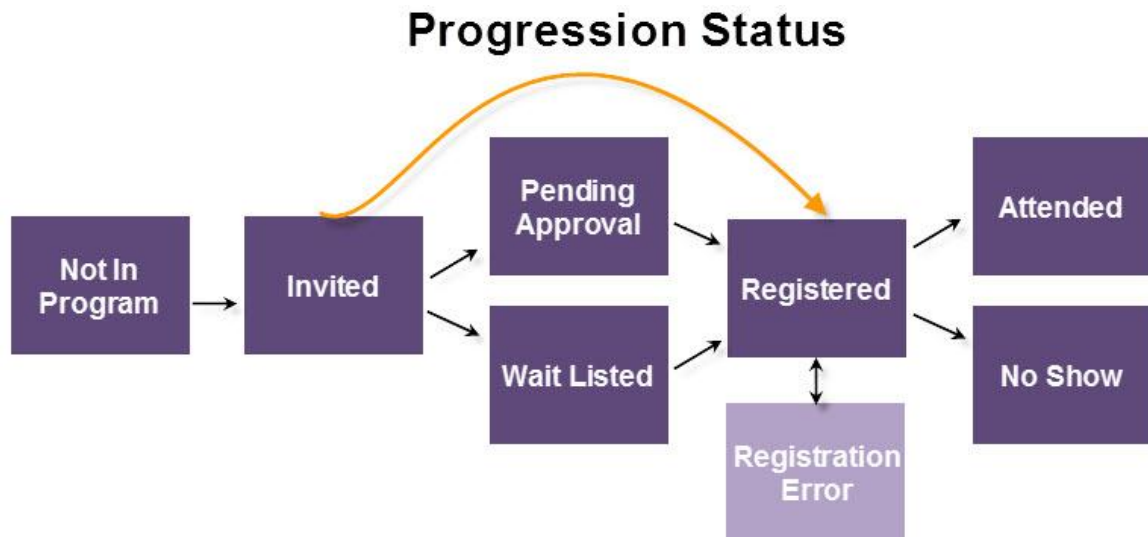
- Filters – Progression Status was Changed, Member of Program.
 - Progression Status was changed – this filter is looking at the activity log and determines which leads moved from status to another.



- Member of Program – use this filter to find people who are members of one or many programs with a specific status.



Leads will move through progressions in a linear fashion and will not go back in status. For example, you won't have a lead that "attended" but then moved back to "registered."



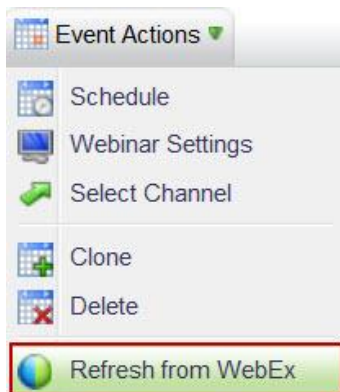
Here is a brief description of the progression statuses associated to the Webinar Channel.

- **Not in Program** – use this progression status to remove leads from the Event.
- **Invited** – use this progression status to add leads to the Event.
- **Pending Approval** – use this status if you wish to hold off on sending your leads a confirmation email. See “Manually Approving Registrants” for more information.
- **Wait Listed** – if you wish to keep some leads in a wait listed status until additional seats become available, use this status.
- **Rejected** – use this status when you wish to reject the registration of a lead to your Event.
- **Registered** – this progression status will push leads to WebEx when you are using the WebEx integration. The lead's status will be updated when we get a response back from WebEx that the lead was successfully registered.



- **Registration Error** – the progression status reflects that the user encountered an error when trying to register for the event.
NOTE: If a Registration Error occurs, you can get additional information by looking at the activity log for that lead. If using a Marketo form, we will validate the email address format, and we will truncate names to comply with the character limit imposed by WebEx. Once the error is fixed, you can manually change the user’s progression status to “Registered” within Marketo.
- **Attended** –at the conclusion of the Webinar, WebEx will return a list of leads who attended. This status will be pulled into Marketo automatically.

NOTE: It can take anywhere from 2 hours to 2 days for WebEx to prepare the final attendance information and make it available in Marketo. To manually update the statuses, please click “Refresh from WebEx” under Event Actions.



- **No Show** – at the conclusion of the webinar, and once attendance data is pulled in from WebEx, the status of leads that registered but did not attend will be updated to No Show.

NOTE: It can take anywhere from 2 hours to 2 days for WebEx to prepare the final attendance information and make it available in Marketo. To manually update the statuses, please click “Refresh from WebEx” under Event Actions.

ASSETS

You will create the assets needed for your event as either Local Assets or in the Design Studio as Global Assets. Please see articles on [Local Assets](#) for more information.

LANDING PAGE & FORM



To ensure that leads are properly registered with WebEx, the following fields must be included in your form:

- First Name
- Last Name
- Email Address

With the proper flow action added to the registration campaign, the leads will get pushed to WebEx and registered. You can add other fields to the form and the information will get captured in Marketo as part of the lead detail record.

EMAILS

You will create the emails to send for invitations, confirmation, follow-up and thank you using Marketo. Remember to set your confirmation email to Operational in order to ensure that people who register, that are also unsubscribed, receive their registration information.

REGISTRATION/CONFIRMATION EMAIL

You can use Marketo to send out the confirmation email for your Event. When the lead registers, they receive a unique URL that they use to enter the Event.

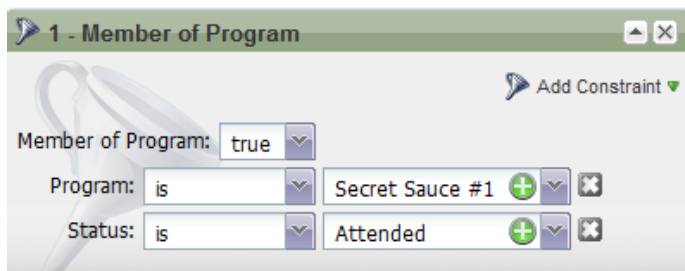
TIP! To populate your confirmation email with this unique URL, use the following token in your email: **{{member.webinar url}}**

When the confirmation URL is sent out, this token automatically resolves to the leads unique confirmation URL.

Reminder: Set your confirmation email to Operational to ensure that people who register, who might be unsubscribed, receive their confirmation information.

SMART LIST FILTERS

We have added an additional filter, called Member of Program. Use this filter to create smart lists across one or multiple events to track lead status.

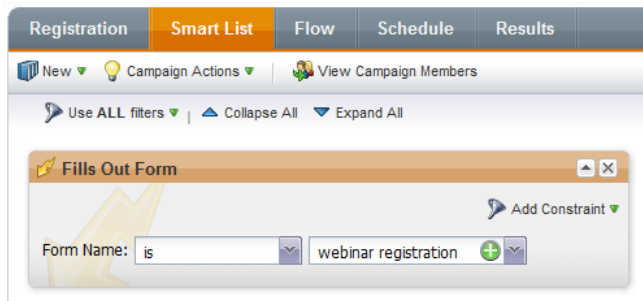




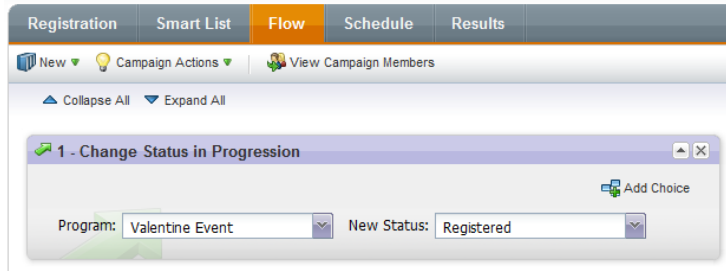
SAMPLE EVENT INTEGRATED WITH WEBEX

Here is a sample event, including the campaigns for a WebEx Webinar:

- Create a new Event in Marketing Activities.
 - Select New Event.
 - Enter a Campaign folder where the Event will live.
 - Enter a name for the Event.
 - Select a Channel for the Event. **NOTE:** This guide assumes that you have selected the Channel Webinar.
- **Invite (Batch Campaign)**
 - Smart List – define who you will invite to the event.
 - Flow
 - Send Email – if this is a local asset email, it will have the following naming convention – EventName.EmailName. Global emails can also be used.
 - Change Status in Progression – set to Webinar -> Invited.
 - Schedule – run immediately or set the date for the invitation to be sent.
- **Registration/Confirmation (Trigger Campaign)**
 - Smart List – Trigger based on “fills out form”. Be sure to include the landing page that the form lives on, by using Add Constraint, especially if the form is used on multiple landing pages.



- Flow
 - Send Email – Confirmation Email (set to Operational).
 - Change Status in Progression – set to Webinar -> Registered.
IMPORTANT: This status will push registration information to WebEx.



NOTE: WebEx will not send out the confirmation email when using the API, therefore you must send this using Marketo. Be sure to include all pertinent event information in the confirmation email, including the URL for attendees. If you are requiring the registration ID, please see “You can use Marketo to send out the confirmation email for your Event. When the lead 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 leads unique confirmation URL.

Reminder: Set your confirmation email to Operational to ensure that people who register, who might be unsubscribed, receive their confirmation information.

” for how to configure the URL.

NOTE: if the lead is returned with a registration error then they will not receive the email confirmation.

- **Reminder (Batch Campaign)**

- Smart List –filter using Member of Program and set the status to Registered.
- Flow – Send Email (Reminder Email).

NOTE: You could have a similar campaign to send a different follow up email to those people who were invited but who have yet to register.

- **Thank you for Attending (Batch or Trigger Campaign)**

- Smart List – Member of Program – set to Attended OR
- Smart List – Progression Status is Changed – set new status constraint to Attended.
- Flow – Send Email (Thank you email).



- **No Show Follow-Up (Batch or Trigger Campaign)**
 - Smart List – Member of Program – set to No Show OR
 - Smart List – Progression Status is Changed – set new status constraint to No Show.
 - Flow – Send Email.



MEMBERS TAB

The Members tab provides visibility into all the leads that have become a member of your event, including their status in the Event.

A lead gets added to the membership grid through the “Change Status in Progression” flow action. Typically, your leads would first get added to the grid using the “Invited” status; however, in the case where you are importing a list of leads, you may be setting their status to something other than “Invited.”

FILTERING THE MEMBER GRID

You can filter the set of leads in the grid by their status.

1. Click the filter icon in the menu bar.
2. In the drop-down, select the status or statuses that you wish to display in the grid.
 - a. To show all statuses, click **All Statuses** at the top of the list.
3. The grid will refresh and display the selected statuses.

MANAGING LEAD STATUS IN THE MEMBER GRID

You can update the status of one or many leads in the lead grid.

1. Select a single lead, multiple leads, or all leads in the grid (**NOTE:** Hold the Shift or Ctrl and click to select consecutive or multiple leads).
2. On the menu bar, click **Change Status** and select the appropriate status from the list.
3. The change will be queued.
4. Refresh the screen using the refresh button at the bottom of the page.
5. Status information will be updated.

MANUALLY APPROVING REGISTRANTS

It is possible to manually approve your registrants before sending them a confirmation email. To do so, you will need to configure your campaigns to handle this additional step:

- Registration Trigger Campaign:
 - Smart List – Trigger off of Fills Out Form.
 - Flow – Change Status in Progression – set to Pending Approval.
- Go to the Event and click on the tab called “Members.”



- From this tab you can see all the leads who have filled out the form, and their status should be set to Pending Approval.
- Use the filter at the top of the grid to view only the leads with status “Pending Approval.”
- Select the leads that you wish to register (Shift, control, or Select All).
- From the menu, click **Change Status** and select either **Registered** or **Rejected** (or any other applicable status).

HANDLING LEADS WITH A REGISTRATION ERROR

If a lead ends up not being registered but rather set to the status “registration error,” it is not too late to recover.

From the Members tab, filter the list of leads with the status “registration error.” Before continuing, make sure you have determined and fixed the issue with integration (check to make sure there are no errors under Event partners).

Once the issue is resolved, select all the leads with the Registration Error status and change their status to Registered. This will try to register them again with WebEx. Be sure to create a separate campaign that is listening for this change and that sends out your confirmation email.

IMPORT A LIST OF LEADS

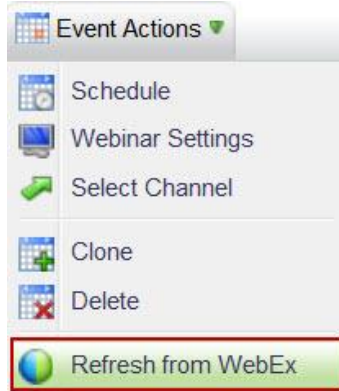
It is possible to import a list of leads directly into the Members grid and set their status. To import a list of leads, click Import Members (see [Import Members](#)). Furthermore, if you import a list of leads into the Members with the status Registered, the leads will be automatically registered with WebEx.

UPDATING MEMBER STATUS FROM WEBEX

To update the attendance status of your leads, you must first wait for the final attendance report to be available from WebEx. Immediately after the event, WebEx compiles a preliminary attendance report that can be found in WebEx under My Reports -> Attendance Report. Once the attendance report is final, attendance information can be updated in Marketo. To update attendance information, please click “Refresh from WebEx” under Event Actions.



MARKETO WEBEX ADAPTER USER GUIDE



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