



KEVY INTEGRATIONS

EXACTTARGET AND CRM

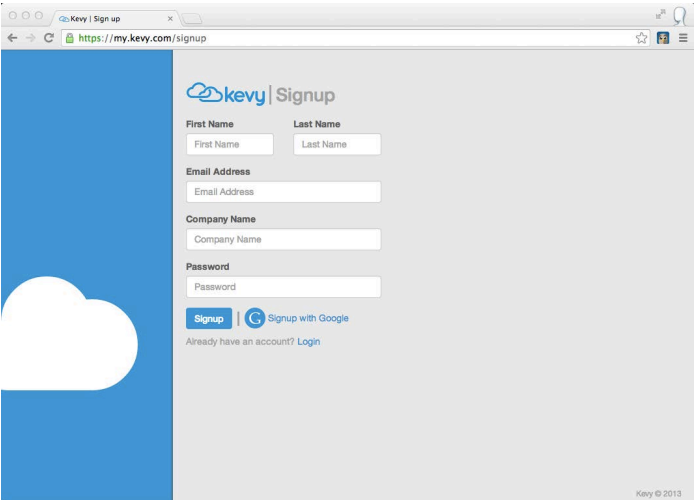
ExactTarget.
a salesforce.com company

BEST PRACTICES INTEGRATING EXACTTARGET AND CRM

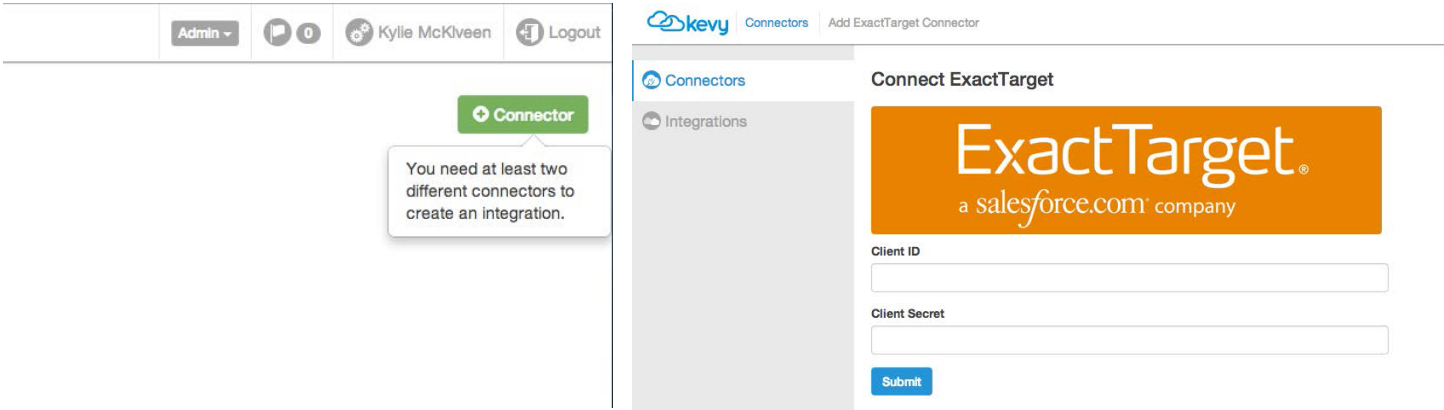
Kevy's Cloud Connectors allow you to seamlessly sync your ExactTarget data with your CRM information without writing a single line of code. Simply choose the data you want to sync and the frequency of the updates, and you're up and running in less than 10 minutes! We want to be sure you are getting the most value out of your Kevy Integrations, so here are the best practices to ensure your set up process goes smoothly.

GETTING STARTED WITH KEVY CONNECTORS

- + Sign up for a Kevy Account at my.kevy.com/signup



- + Once you have successfully signed up, you will be directed to the Kevy Dashboard and prompted to add your first Connector. Click on 'Connector' and select ExactTarget from the list of cloud apps. At this point in the set-up process you will be asked to authenticate ExactTarget by entering your **Client ID** and **Client Secret**.

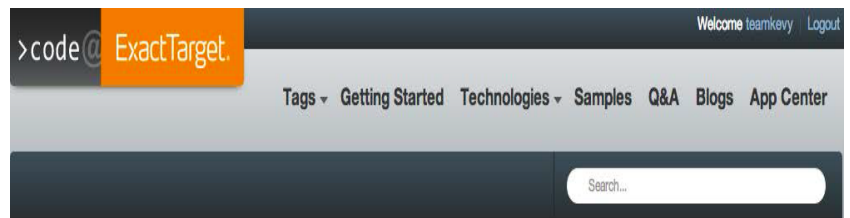


- + Don't worry, Kevy provides helper text to assist you in finding your Marketo SOAP Endpoint, User ID and Encryption Key!

FINDING YOUR EXACTTARGET CLIENT ID & CLIENT SECRET

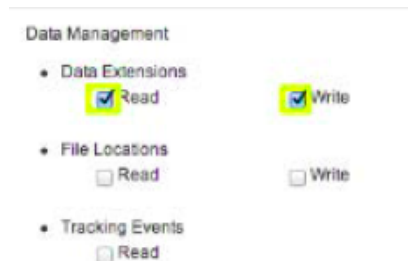
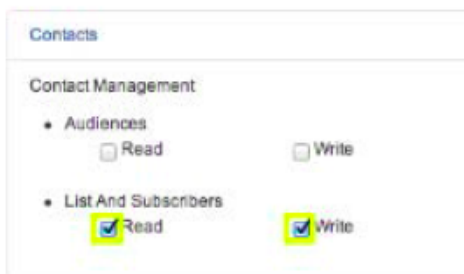
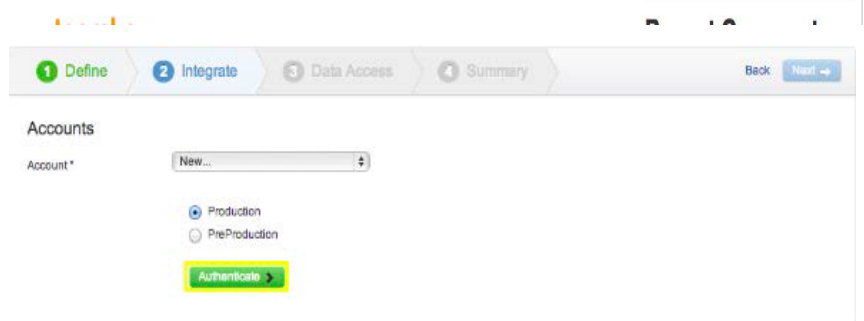
Step 1

- + Login to Code@ExactTarget with your new or existing credentials. Click 'App Center' on the main navigation.



Step 2

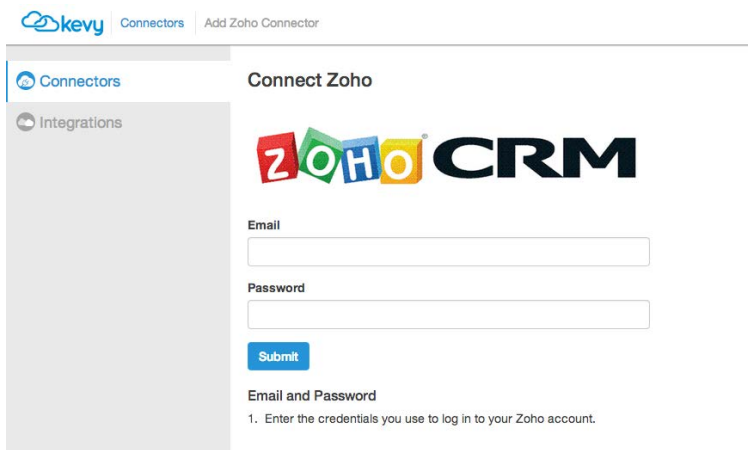
- + After getting to your App Center, click 'Create New App'. Select the Server-to-Server template. Fill in the setup wizard using the screenshots shown here.



- + After clicking 'Finish', your Client ID & Client Secret will be displayed. You will need these to finalize your ExactTarget Connector. Make sure to follow the helper text closely, but if you have any difficulties, feel free to contact support@kevyl.com.

AUTHENTICATING YOUR CRM CONNECTOR

- + After authenticating your ExactTarget Connector, you will automatically be taken back to the Keyv dashboard. Click on 'Connector' and select your CRM platform from the cloud apps. For this example, let's say you are using Zoho as your CRM platform. When you select Zoho among the connector options, you will be **asked to enter the credentials you use to log in to your account.**



- + Enter your email address and password to authenticate the Zoho connector. It's that easy!

The screenshot shows the 'Connectors' page in the Kevy dashboard. The top navigation bar includes the Kevy logo, 'Connectors', and user information (Admin, 0 notifications, Kylie McKlveen, Logout). The left sidebar has 'Connectors' and 'Integrations' options. The main content area displays two connector cards. The first card is for ExactTarget (ID: 6173122) and the second is for Zoho CRM (ID: connectors@kevy.com). Both cards show the respective logos and a 'Connected' status with an 'Edit' button. A green '+ Connector' button is in the top right, and a 'Create An Integration' button is at the bottom right.

+ You should now be looking at your Kevy Dashboard. You have added both of your Connectors and you are ready to create an Integration.

CREATING YOUR INTEGRATION

Click the 'Add Integration' button and select ExactTarget and Zoho in the drop-downs. Click 'Create Integration'.

The screenshot shows the 'Create An Integration' page. The top navigation bar includes the Kevy logo, 'Integrations', and 'Create An Integration'. The left sidebar has 'Connectors' and 'Integrations' options. The main content area is titled 'Create An Integration' and contains two dropdown menus. The first dropdown is labeled 'Select Your First Connector:' and is set to 'ExactTarget (6173122)'. The second dropdown is labeled 'Select Your Second Connector:' and is set to 'Zoho CRM (connectors@kevy.com)'. A blue 'Create Integration' button is at the bottom.

INTEGRATION SETTINGS PAGE



Integrations

Integration: ExactTarget - Zoho CRM

Admin

0

Kylie McKiveen

Logout

Connectors

Integrations

ExactTarget & Zoho CRM

Delete

Live

Activities: 0 | Next sync: 24 hrs

Edit your integration

Pause Sync Log

Save

Integration Name

Sync Frequency

1 day

Select sync target(s)

ExactTarget

All Subscribers

Zoho CRM

No options available

Map Field Attributes (* required)

ExactTarget Subscribers & Zoho CRM Leads

<input type="checkbox"/>	ExactTarget subscribers		Zoho CRM leads
<input type="checkbox"/>	id	→	leadid
<input type="checkbox"/>	email_address *	→	email *

+ Add Row

ExactTarget Subscribers & Zoho CRM Contacts

<input type="checkbox"/>	ExactTarget subscribers		Zoho CRM contacts
<input type="checkbox"/>	id	→	contactid
<input type="checkbox"/>	email_address *	→	email *

+ Add Row

Save

Step 1

ExactTarget & Zoho CRM

Live

Edit your integration

Pause Sync Log

Integration Name

Select sync target(s)

ExactTarget

All Subscribers

Map Field Attributes (* required)

Sync Frequency

- 1 day
- 1 day**
- 6 hours
- 1 Hour
- 30 Minutes
- 15 Minutes
- 5 Minutes

Zoho CRM

No options available

+ The top half of the integration set-up page is where you will give your integration a custom name and select how often you want the data passing between ExactTarget and Zoho (daily all the way down to every 5 minutes).

Step 2

Map Field Attributes (* required)

ExactTarget Subscribers & Zoho CRM Leads

<input type="checkbox"/>	ExactTarget subscribers	<input type="text"/> <input type="button" value="v"/> <input type="button" value="i"/>	Zoho CRM leads
<input type="checkbox"/>	id	<input type="button" value="→"/> <input type="button" value="v"/>	leadid
<input type="checkbox"/>	email_address *	<input type="button" value="→"/> <input type="button" value="v"/>	email *

+ Add Row

ExactTarget Subscribers & Zoho CRM Contacts

<input type="checkbox"/>	ExactTarget subscribers	<input type="text"/> <input type="button" value="v"/> <input type="button" value="i"/>	Zoho CRM contacts
<input type="checkbox"/>	id	<input type="button" value="→"/> <input type="button" value="v"/>	contactid
<input type="checkbox"/>	email_address *	<input type="button" value="→"/> <input type="button" value="v"/>	email *

+ Add Row

+ Keyv gives you the ability to change the sync direction not only at the integration level, but at the field level. This gives you even more flexibility to customize your integration exactly the way you need it.

Sync rules for your integration ✕

ExactTarget field is the master and inserts/updates data in Zoho CRM field.



Zoho CRM field is the master and inserts/updates data in ExactTarget field.



Both connectors update one another. Syncs data in both directions with inserts/updates on one side done to the other side and vice versa. When both sides have a change, the one with the most recently updated timestamp overrides the data in the other field.



Zoho CRM can only create new records in ExactTarget. ExactTarget field is the master and inserts/updates any data in the Zoho CRM field unless the ExactTarget field is empty at which point Zoho CRM data is written to ExactTarget.



ExactTarget can only create new records in Zoho CRM. Zoho CRM field is the master and inserts/updates any data in the ExactTarget field unless the Zoho CRM field is empty at which point ExactTarget data is written to Zoho CRM.

Close

+ On a field-by-field basis, you can decide which way you would like your data flowing, unidirectional or bidirectional. Keyv provides three different bidirectional options for your many use cases:

1) **Peer to peer** - This is an exciting feature based on time stamps. The most recent data will be reflected in the both systems.

*This option is great for opt-in/opt-out field.

2) **ExactTarget is the master** - With this integration option, ExactTarget will sync any new records or updated fields into Zoho. Since Zoho is secondary, this integration will only sync new records or non-existent data from Zoho into ExactTarget.

3) **Zoho is the master** - With this integration option, Zoho will sync any new records or updated fields into ExactTarget. Since ExactTarget is secondary, this integration will only sync new records or non-existent data from ExactTarget into Zoho.

*This option is great when you know the Zoho field will be more accurate than ExactTarget.

MAPPING YOUR FIELDS

With Kevy's flexible set-up process, some fields are automatically mapped between the two systems, however there are many additional fields that can be mapped between ExactTarget and Zoho. Kevy pulls in all available fields from both systems, including your custom fields.

- + To access these fields click the 'Add Row' button at the bottom of the mapped fields section.
- + There is a drop-down on both the ExactTarget and Zoho side. Find fields that match on both sides.
- + Remember you can map as much data or as little data as you would like!

-	<input type="text"/>	→
-	<input type="text"/>	→
-	<input type="text"/>	→
-	<input type="text"/>	→

+ Add Row

- contactid
- contact_owner
- lead_source
- first_name
- last_name *
- title
- accountid

FINALIZING YOUR INTEGRATION

kevy Integrations

Admin 0 Kylie McKlveen Logout

Connectors Integrations

Integrations

ExactTarget & Zoho CRM

Live Activities: 0

Integration Sync Log

- + Click 'save' and set it and forget it.

BENEFITS OF INTEGRATING EXACTTARGET AND CRM

Kevy's integration between ExactTarget's Marketing Automation and a CRM Platform (like Zoho) allows you to spend more time focusing on your core business and less time manually maintaining and transferring data between your apps. With this point-and-click integration, you have the flexibility to customize your data sync to best reflect the needs of your company. Simply choose the data you want to integrate and select the frequency you want to sync - then you are up and running in less than 10 minutes.

Kevy's plug-and-play integrations eliminate the cost and complexity of traditional integrations. Save time and money while getting more out of your existing cloud investments.

By integrating data between your CRM platform and ExactTarget, you are able to run smarter, more effective marketing campaigns that create repeat buyers.

EXACTTARGET WITH CRM ALLOWS YOU TO:

- + **Drive more revenue** by giving your sales reps the ability to sort leads by the most active and the best fit, thus closing more deals.
- + **Optimize Resources** by eliminating error-prone data transfer. With Kevy, no IT knowledge is required.
- + **Create a unified view of your customers** by automatically adding new marketing prospects to your CRM platform.

LEARN MORE

Want to learn more about Kevy's Marketo and CRM integrations or our other connectors? Check out kevy.com to learn more.

About Kevy

Kevy's plug-and-play Cloud Connectors make it fast and easy to integrate your cloud apps. With Kevy, your cloud apps can start sharing data in less than 10 minutes, without writing a single line of code, enabling you to get more out of your current investments.

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