INTEGRATION GUIDE

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Introduction

The INFUSE and Demandbase integration enables **accurate, automated transfer of your target account lists from Demandbase into your INFUSE demand generation programs**.

The accounts you build and qualify in Demandbase flow directly to INFUSE, with no manual exports and no list-handoff lag, so your demand programs seamlessly reach accounts as they qualify.

Setup runs on Demandbase Custom Actions, entirely inside your Demandbase environment using credentials issued by INFUSE. **There are no Demandbase-side API tokens for your team to generate or share, which keeps your credentials contained and your setup secure**.

What this integration delivers

1. **Dynamic account targeting:** Demandbase delivers your qualified accounts to INFUSE on an ongoing basis, eliminating manual list exports. Through an INFUSE exclusive capability, your custom Demandbase journey stage data is pulled and used to target each account by the exact stage it occupies.
2. **Faster campaign activation:** New accounts that meet your Demandbase criteria flow into INFUSE demand programs without delay, where INFUSE tailors relevant campaign tactics to each account's Demandbase journey stage.
3. **Unified visibility:** Demandbase account data and INFUSE campaign engagement data feed the INFUSE Demand Accelerator, INFUSE's proprietary demand intelligence dashboard, providing a single view of pipeline contribution.
4. **Aligned go-to-market motion:** Your Demandbase account-based marketing strategy and your INFUSE demand generation programs run off the same account list, enabling consolidated intelligence to elevate demand generation efficiency and outcomes.

Prerequisites

To connect INFUSE with Demandbase, the following are required:

- An active Demandbase license, which allows triggered, user-initiated syncs of your accounts to INFUSE.
- Active INFUSE engagement or signed Statement of Work (SOW), to confirm that there is a live campaign to activate.
- Demandbase Admin permissions for the user configuring the integration, or an equivalent permission set with access to Custom Actions and Orchestration.
- A Demandbase Orchestration license, which allows automated, ongoing list syncs to INFUSE (optional).

If you are unsure whether you meet any of these prerequisites, reach out to your INFUSE Client Success expert before starting the setup.

How the integration works

The integration is set up as a Demandbase Custom Action that calls an INFUSE endpoint. INFUSE issues you an API key and an Endpoint URL, these are the credentials you use inside Demandbase to configure the Custom Action.

The setup runs in four steps:

1. **Confirm with your INFUSE Client Success expert** that you want to enable the integration.
2. **Receive your INFUSE setup pack:** the API key (used as a Bearer token) and the Endpoint URL.
3. **Configure the Custom Action inside your Demandbase** instance using the credentials provided. Please view here instructions for configuring Custom Actions in Demandbase.

4. **Demandbase is connected to INFUSE,** and your target accounts can be pushed to activate your demand programs.

Please note: In step 4, a Demandbase Orchestration license is required to push accounts to INFUSE automatically. Without this license, the integration still works, but accounts need to be pushed manually by your team. INFUSE will send regular reminders to keep your account syncs on schedule.

Step-by-step setup

1 Start with your INFUSE Client Success expert

Notify your INFUSE Client Success expert that you would like to enable the Demandbase integration.

To receive your setup pack, confirm the following to your INFUSE Client Success expert:

1. **Your business or account name** as it should be registered on the INFUSE side.
2. **Explicit confirmation** that you want to enable the INFUSE and Demandbase integration.
3. **Your preferred go-live timing** for the campaign(s) the integration will support.
4. **Your inventory of Demandbase lists** that will be sent to INFUSE, with the INFUSE campaign/sub-campaign and Demandbase journey stage each list maps to.
5. **The order of your Demandbase journey stages** for each list, showing which stage comes before and which comes after, so INFUSE can sequence account targeting to match your buying journey.

Please note: Each list appears in INFUSE under its Demandbase list_name. The name you set in Demandbase is exactly what appears in INFUSE reporting and export file names.

2 Receive your INFUSE setup pack

Once the details above have been confirmed, your INFUSE Client Success expert will deliver your setup pack. **This contains the two credentials you need to configure the integration in Demandbase:**

- **API key:** the authentication credential the Demandbase Custom Action uses to call the INFUSE endpoint. It is used as a Bearer token in the Authorization header.
- **Endpoint URL:** the destination the Demandbase Custom Action calls when pushing accounts to INFUSE.

Please note: Confirm receipt with your INFUSE Client Success expert so the activation timeline can move forward.

Treat the API key like a password: store it securely, share it only with whoever is responsible for configuring the Custom Action. Never paste it into shared documents, chats, or tickets. **If your API key is lost or needs rotating, contact your INFUSE Client Success expert, who will revoke it and issue a new one.**

3 Configure the Custom Action in Demandbase

With your API key and Endpoint URL in hand, **create the Custom Action HTTP integration inside Demandbase.**

View the step-by-step for creating the Custom Action HTTP integration in the Demandbase integration documentation here.

This process has to be completed by a user with Demandbase Admin permissions, or an equivalent permission set with access to Integrated Systems and Custom Actions. Orchestration access is optional, required only for automated account data sync.

Need help? If you encounter any issues during configuration, contact your INFUSE Client Success expert before re-attempting. INFUSE can verify the credentials and endpoint on the INFUSE side.

What happens after activation

Once the Custom Action is live in Demandbase and accounts begin flowing through:

1. Your target accounts arrive in INFUSE, and your INFUSE demand programs activate against them in line with the go-live timing you set with your INFUSE Client Success expert during setup.
2. Demandbase account data and INFUSE campaign engagement data both feed into your Demand Accelerator dashboard, so you can track pipeline contribution and engagement in one place.
3. Your INFUSE Client Success expert walks you through dashboard access and reporting cadence as part of the campaign kickoff.

CONTACT US

If you encounter any issues or need assistance during the integration process, please contact your INFUSE Client Success expert. The team is also available via email:

Client Success: cs_support@infuse.com

With 24/5 coverage, the team will ensure your request is addressed promptly.