HubSpot integration for Kaltura Events

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This article is designated for administrators.

About

HubSpot is a platform that connects marketing, sales, and services tools to a unified CRM database. Kaltura HubSpot integration creates HubSpot contacts for event registrants and updates their attendance status.

The Kaltura HubSpot integration consists of two independent parts:

1. Kaltura Events app on HubSpot App Marketplace
2. HubSpot integration for Kaltura Events

Kaltura Events app on HubSpot App Marketplace enables easy data sharing from HubSpot to Kaltura, such as creating a registration form on HubSpot and registering the contact on Kaltura automatically.

Note - HubSpot supports three statuses - *Register*, *Attend*, and *Cancel*. All Kaltura statuses are mapped to these three statuses.

Kaltura Status	HubSpot Status
Created	Register
Registered	Register
Invited	Register
Confirmed	Register
Auto confirmed	Register
Attended	Attend
Participated	Attend
Blocked	Cancel
Un-registered	Cancel

HubSpot integration for Kaltura Events enables easy data sharing from Kaltura to HubSpot, by automatically creating a marketing event on HubSpot for every event created on Kaltura Events and sending registrants' information and attendance status to HubSpot to be able to track and create HubSpot workflows and automation around registration/attendance information.

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To get the experience between HubSpot and Kaltura, it is recommended to set it up on both platforms.

Prerequisite

HubSpot integration requires a custom event template with webhook configured.

Connect Kaltura app to HubSpot

1. Search for "Kaltura" on the **HubSpot App Marketplace**.
2. Click **Choose Account**.
   A page displays alerting you that Kaltura is requesting access to your HubSpot account. The page outlines details of the integration, including how Kaltura will manage and view your CRM data, create timeline events, and handle other basic OAuth functionality.
3. If you agree to these details and would like to continue connecting to the Kaltura app, click **Connect app**.
4. A page displays prompting you to log in to Kaltura (use your username and password for Kaltura Events). If you are using other types of authentication (such as two factor authentication or SSO), contact support to help you connect the app.

HubSpot integration for Kaltura Events

There are two levels of integration settings on the Kaltura Events management interface.

1. Account Level
2. Event Level

Account level

The account level should be set up so that you can connect different events to use for the HubSpot integration.

Set up the HubSpot integration on the account level

Each integration needs to map the registration form fields to the lead records on HubSpot. Each Kaltura Events registration form is set up by the template per event.

To set up an integration

1. On the Kaltura Events screen navigate to the **Integrations** tab**.**

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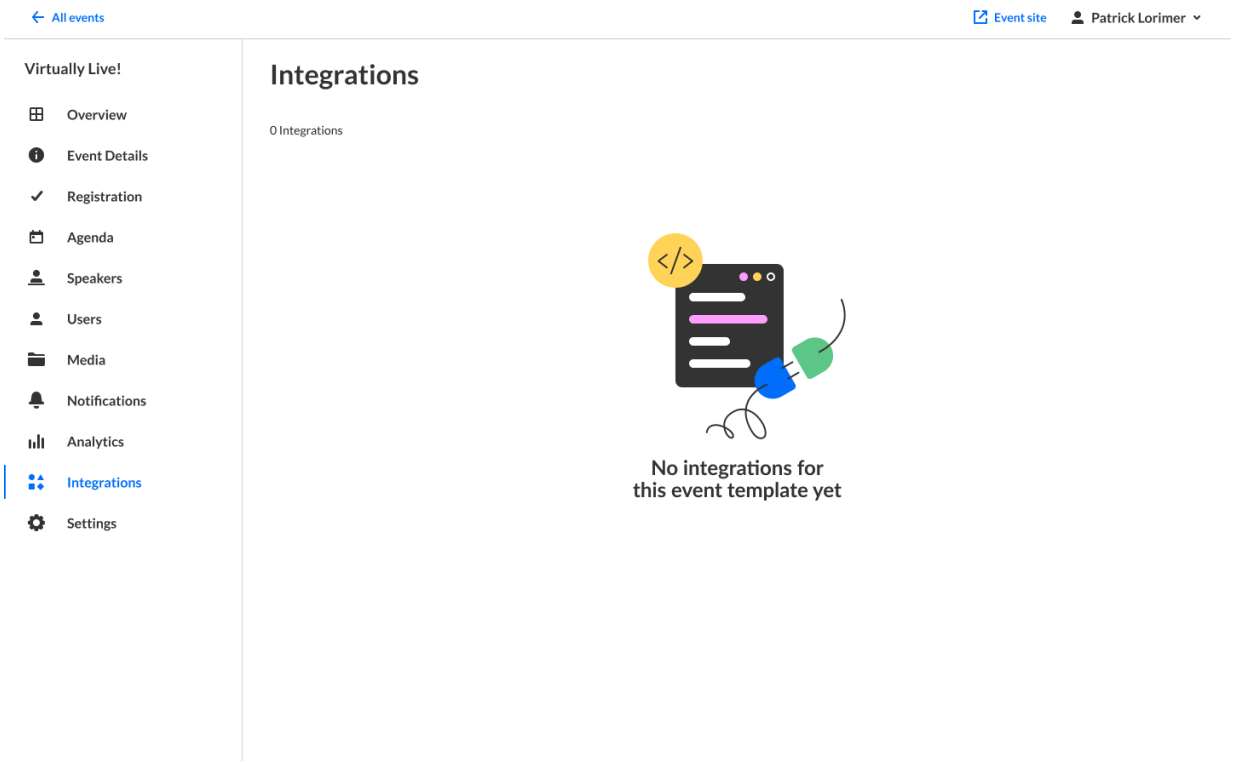
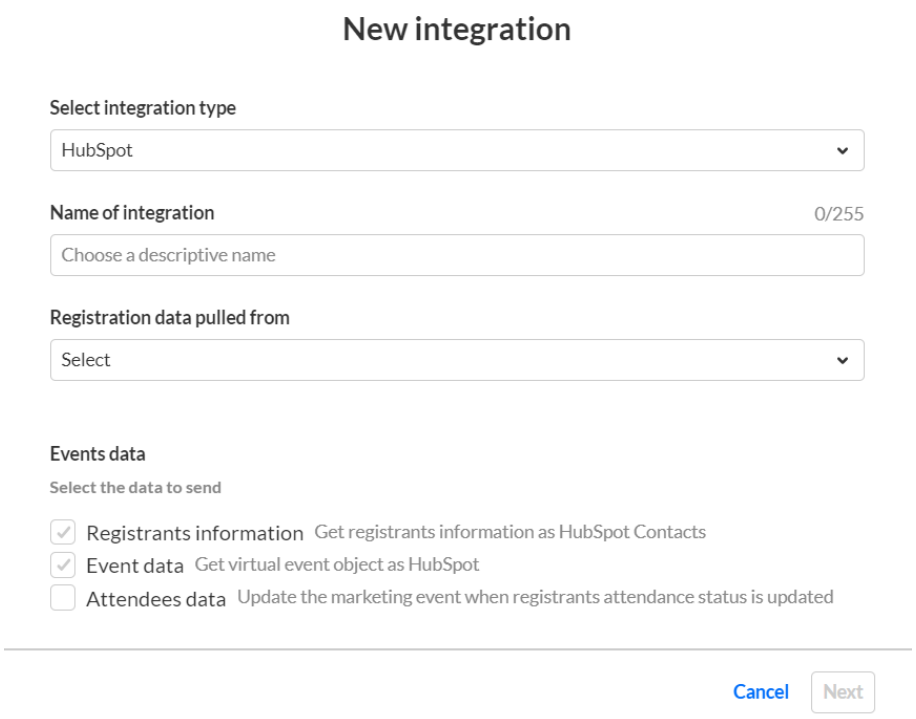


The first time you view this tab, the list is empty. A list of other existing integrations that were created for this account/partner are displayed after subsequent use.

2. Click **Add integration**. The New integration window displays.



3. In the **Select integration type** pull-down list, select HubSpot.
4. In the **Name of integration** field, type a name for the integration. We recommend

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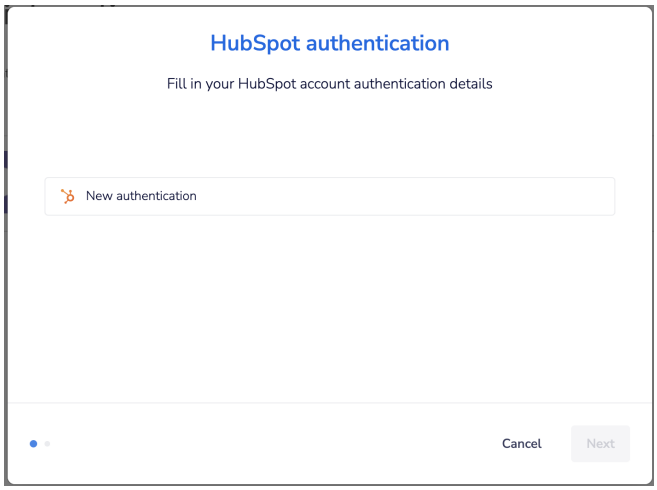
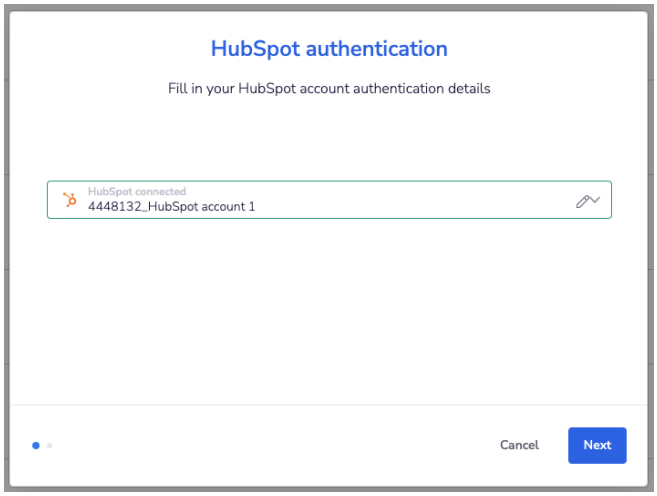
using a descriptive name, for example "Event HubSpot Integration".

5. In the **Registration data pulled from** pull-down list, select where the data will be pulled from.
6. In the **Events data** area, select the Kaltura Events data you would like to send to HubSpot.
   - **Registrants information** - (Lead or registrant information) This item is checked by default and cannot be unchecked. This obtains registrant information as HubSpot leads. The registrant information is mandatory. That is the part that creates the lead in HubSpot.
   - **Event data** - Create HubSpot marketing event for event created on Kaltura.
   - **Attendees data** - Check to update the lead record that was created when registrants log into the event. The lead record is updated with the attendant's information.
7. Click **Next**. The HubSpot authentication screen displays.





8. If accounts already exist, they are listed here. You can use one of the existing accounts or create a new one by expanding the pull-down list and clicking on **Add a new account**. If accounts *do not* already exist, simply click **New authentication**.

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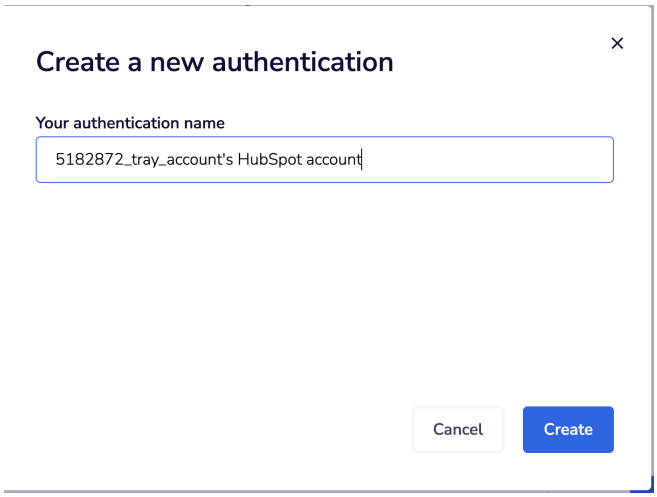
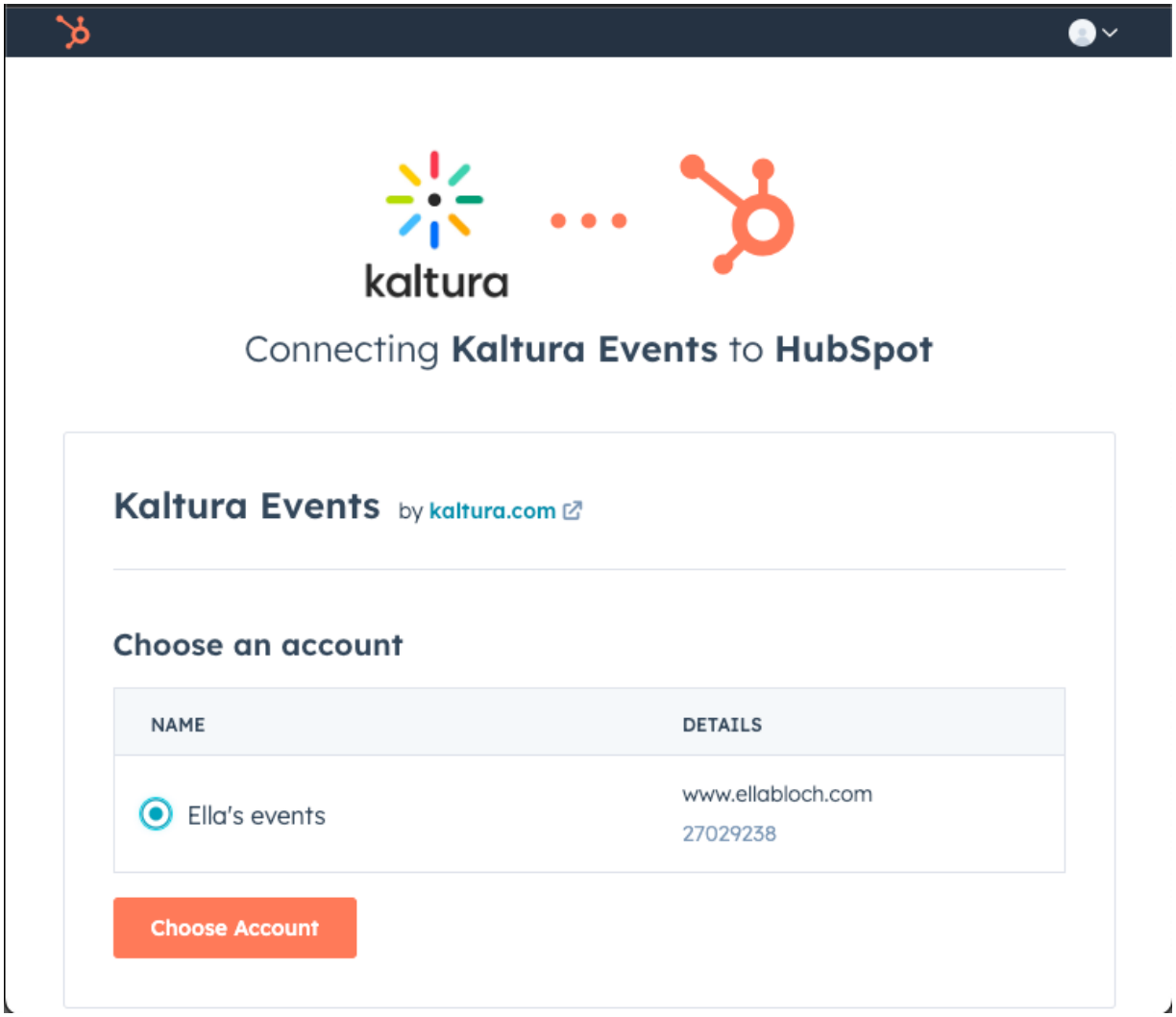
9. The Create a new authentication screen displays. Name the authentication with a meaningful name to identify the authentication you used.



10. Click **Create.**
11. Authenticate to HubSpot and select the account. A page displays prompting you to choose the desired account.



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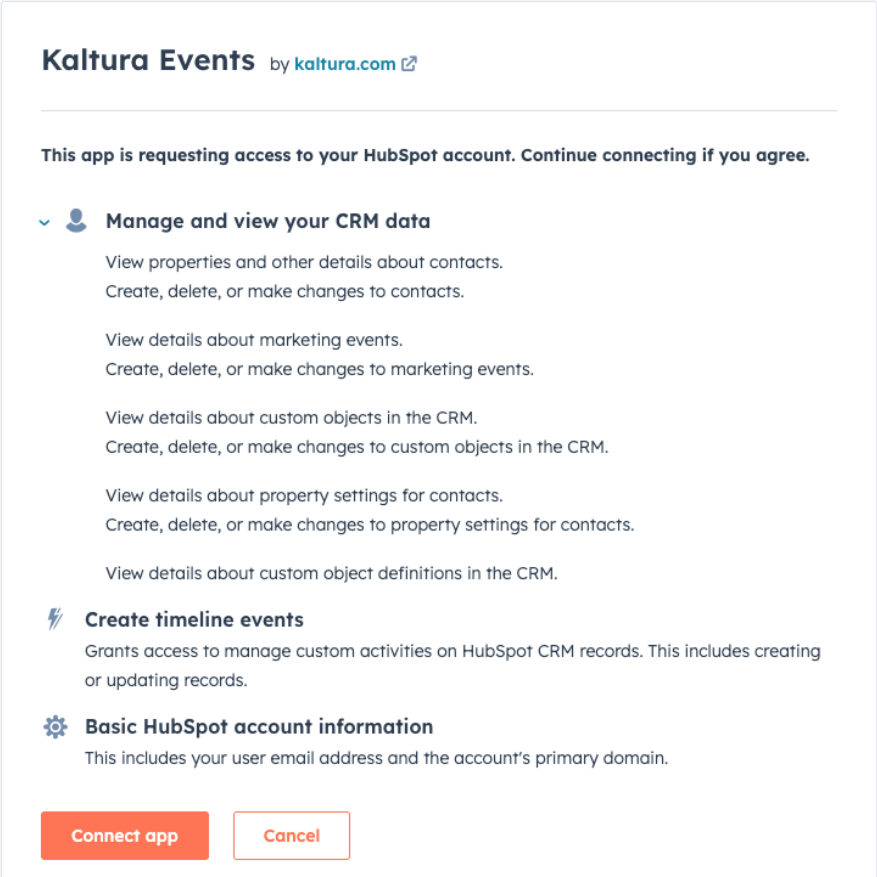
12. Click **Choose Account**.
13. A page displays prompting you with relevant app permissions required. Approve app permissions by clicking **Connect app.**



    A message displays letting you know that the authentication for the app was successfully created.
14. Click **Next.** The field mapping screen displays.
    Our recommended mapping is as follows however review the specific properties you use in HubSpot before configuring:

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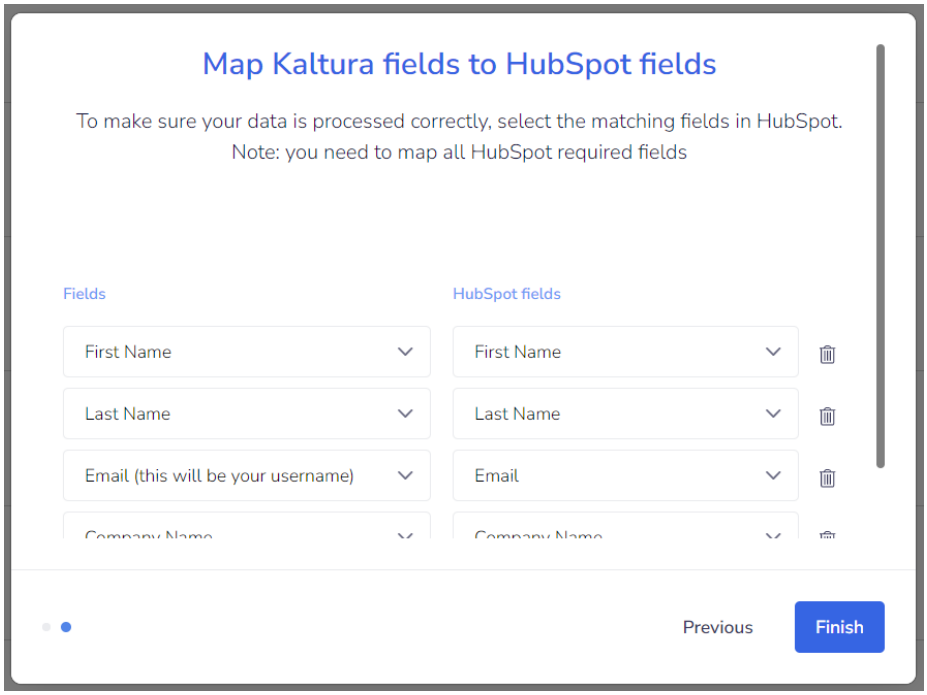

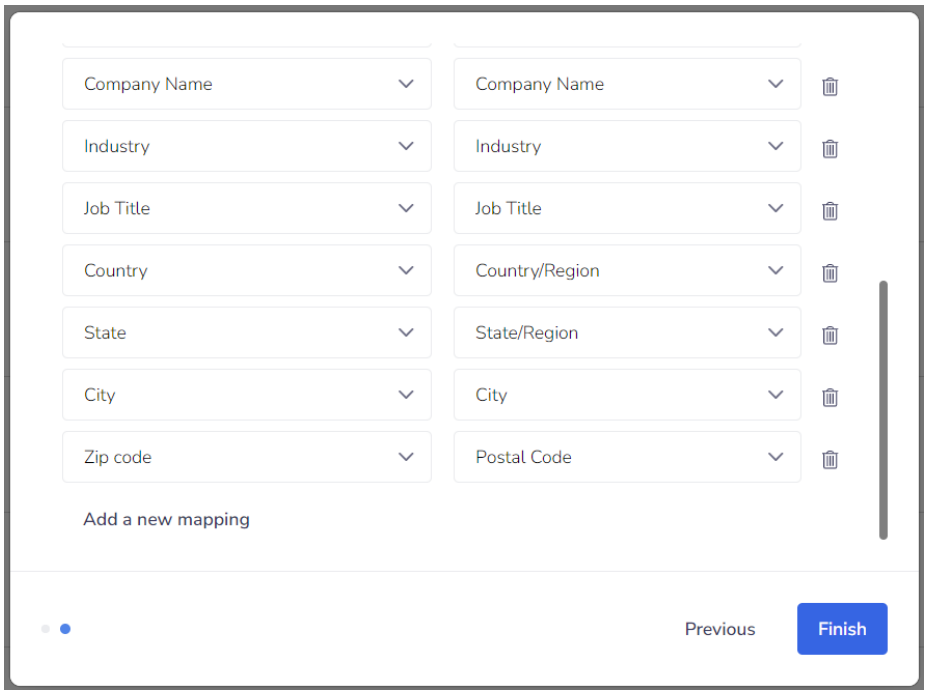

15. Map the different fields on Kaltura registration form to HubSpot contact fields. Make sure you map **ALL** your HubSpot contact required fields (if there are any).

⚠
When mapping email, be sure to choose "Email" HubSpot field as shown below (not a variant email field).

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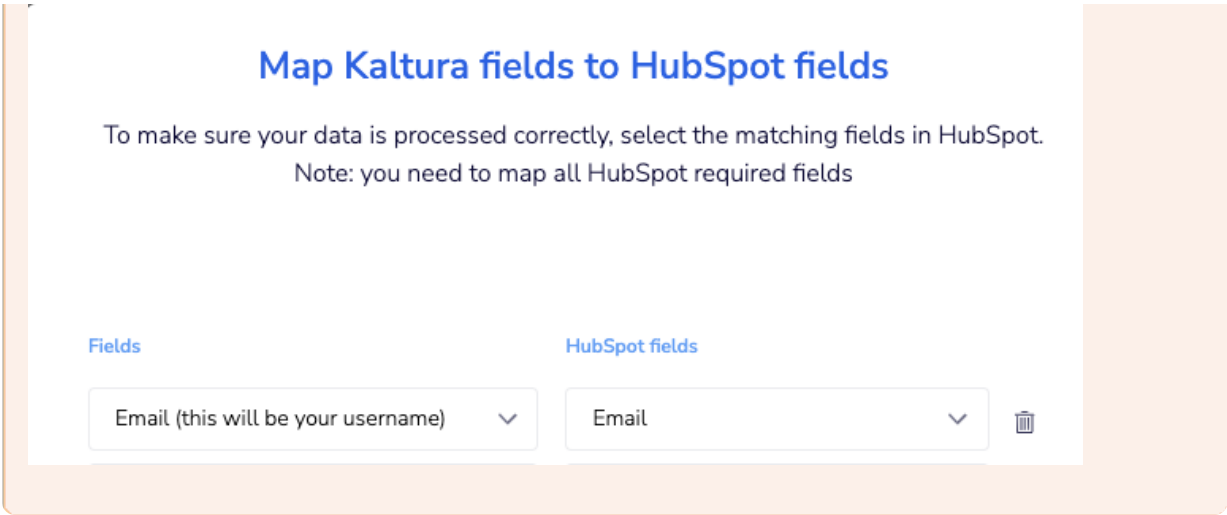
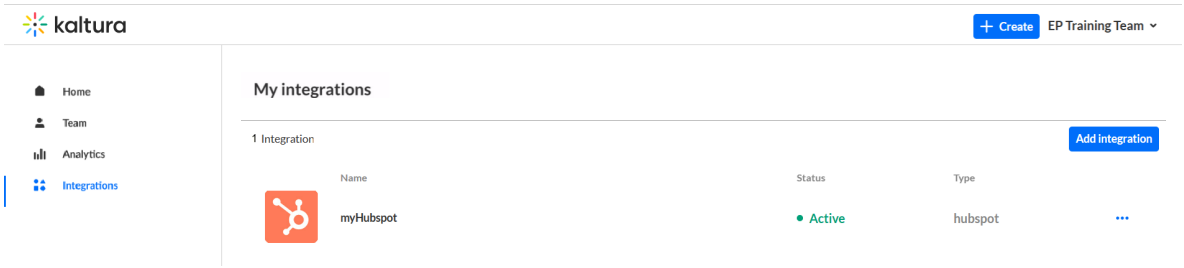


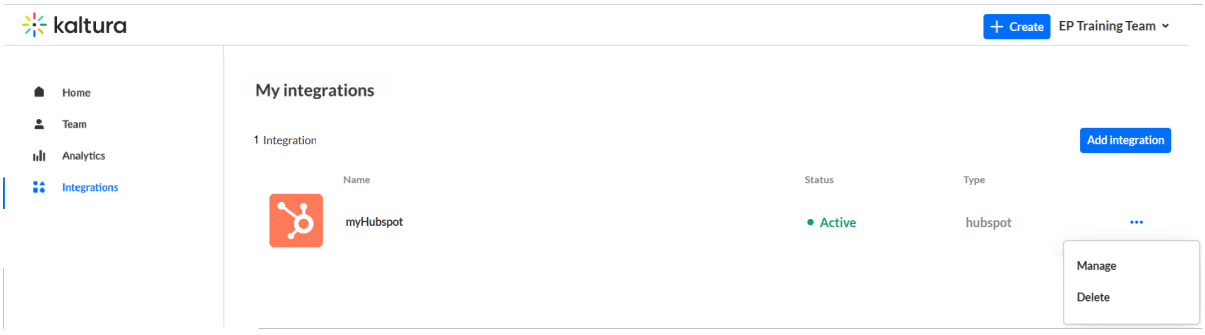
16. Click **Finish**. The HubSpot integration displays.



Manage and/or Delete the HubSpot Integration on the Account Level

You can manage and/or delete the integration by clicking on the three blue dots to the right of the desired integration and selecting the appropriate option.

⚠ Deleting an integration is only available if the integration is not yet enabled on an event.



Other integrations will eventually be added, and the screen will display multiple integrations.

Each integration is different per the event information entered. Only active integrations may be enabled on events. If an integration is disabled, you may have missing

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information on the integration, such as incomplete field mapping.

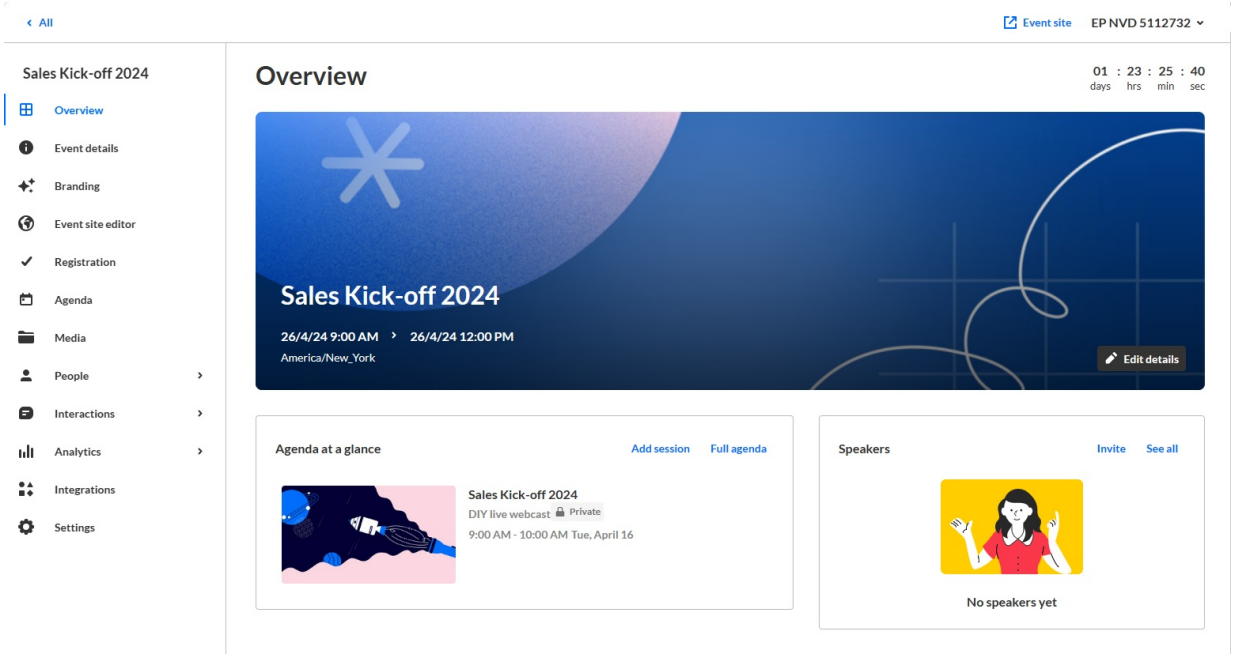
> Integrations are not enabled until you enable the integration per event. This process sets the groundwork for the event organizer(s) to turn it on.

Event level

Set up the Kaltura HubSpot integration for a specific event

1. From the Event list, select **Edit** from the actions menu to edit the event you would like to add the integration to.

   The Event window displays.



2. In the Event window, navigate to the **Integrations** tab**.** Now that you are you on a specific event, you will see only the integrations that apply for that event.

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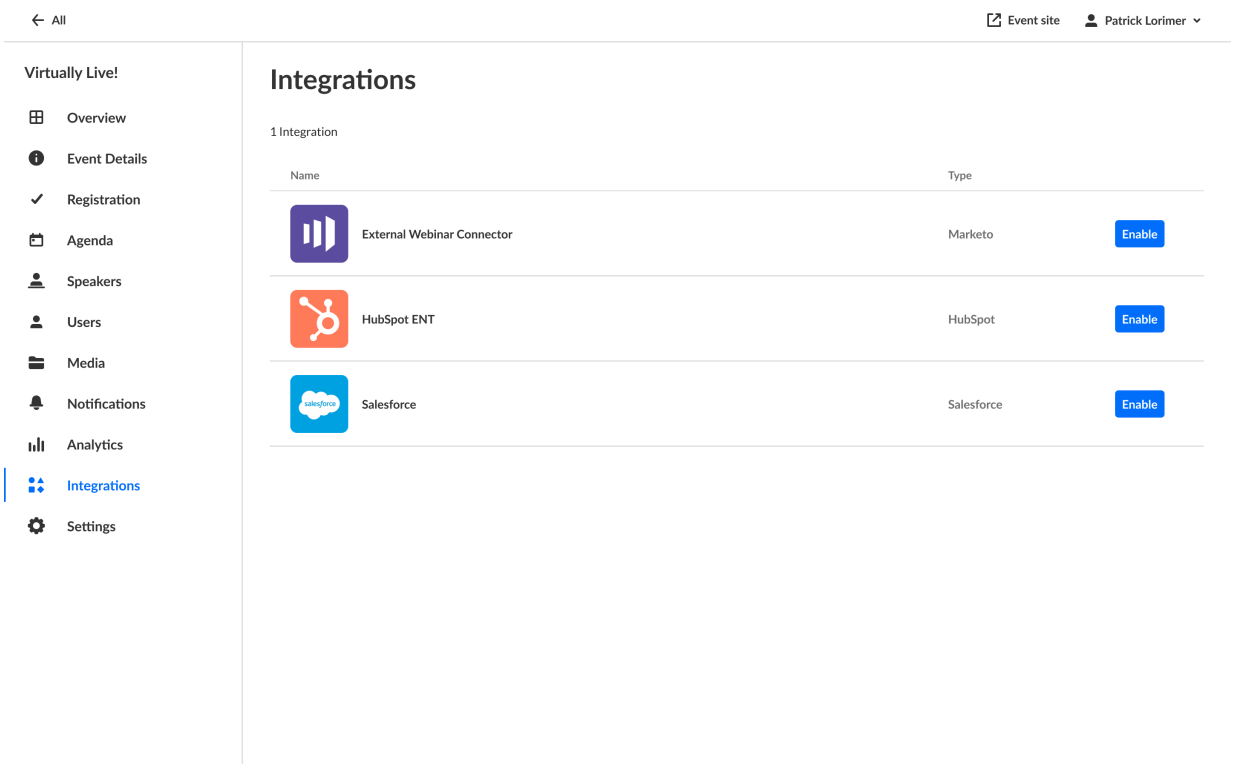
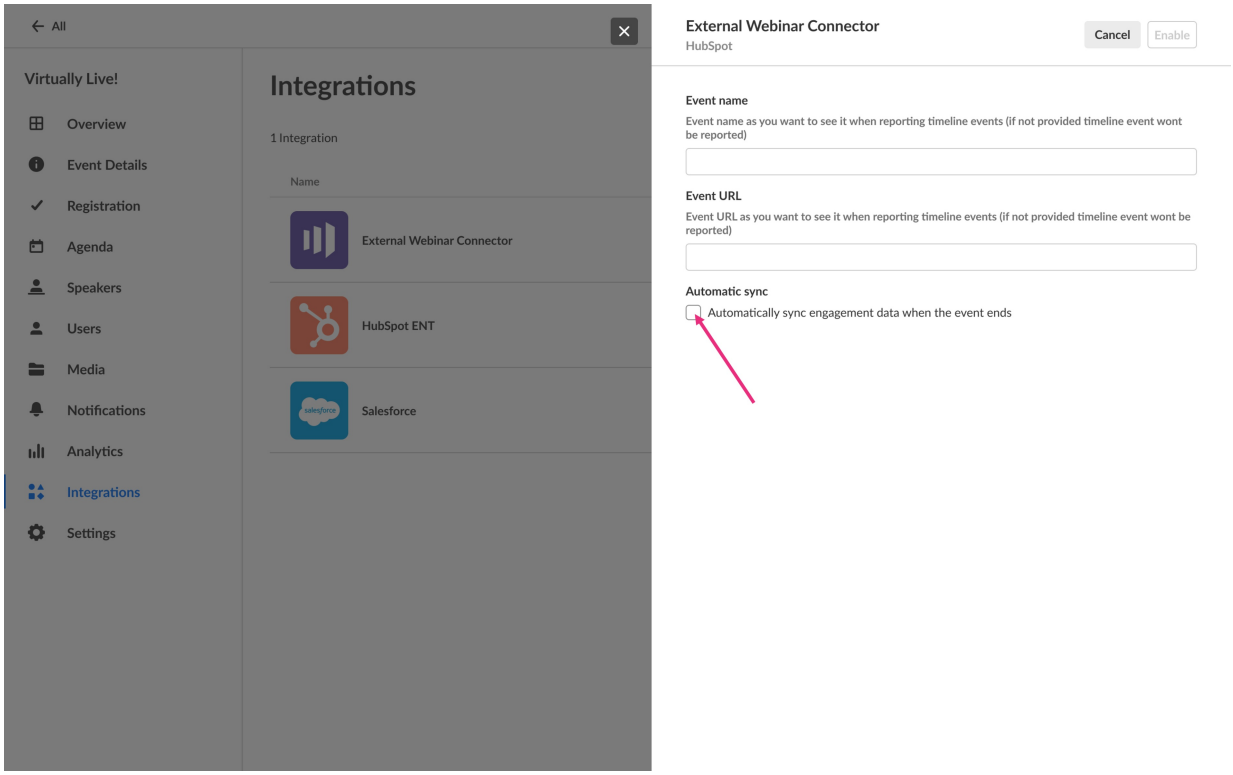


3. Click **Enable**.
4. Enter your event name and event URL.
5. Click to enable **Automatic sync** if you would like to automatically sync data one hour after the event ends.



6. Click **Enable**. You receive confirmation that the integration was successfully enabled

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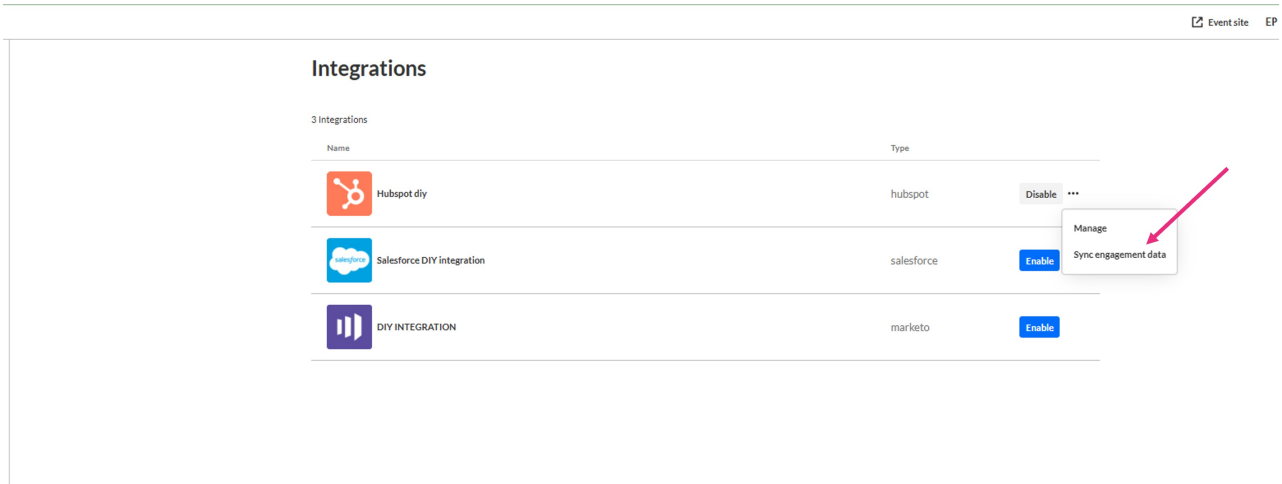
for this event.

Manage or sync engagement data

After the integration is enabled you can **disable**, **manage** or **sync** engagement data.

On the Integrations tab, locate the HubSpot integration and choose one of the following:

1. **Disable** - Stop data synchronization to HubSpot for this event.
2. **Manage** - Edit the event name, event URL, or automatic sync settings.
3. **Sync engagement data** - Manually sync registrant and attendee engagement data after the event ends.



The data sync is active only for Simulive or Live entries and will be added to Interactive Sessions in the future.

For more information, see Kaltura data sharing integration for Hubspot - How to set up Hubspot.

Timeline events

To view timeline activities from Kaltura, click Contacts in the top menu and choose a contact. Then click on **Filter activity** and make sure Kaltura Events is marked under INTEGRATIONS.

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