Send Kaltura Virtual Events data to Salesforce

Content updated: 09/07/2023

This article is designated for administrators.

About

The **Salesforce integration** for Kaltura Virtual Events sends your event registrants and attendees to Salesforce, so your marketing team can follow up with them there.

Each registrant arrives in Salesforce as a lead with their registration details. You can update the lead later with their attendance and engagement data.

To send data to Salesforce, first add Salesforce to your Kaltura account, then enable it for a specific event.

The screens in this article show a single-session event. The same actions apply to a multi-session event.

Before you start

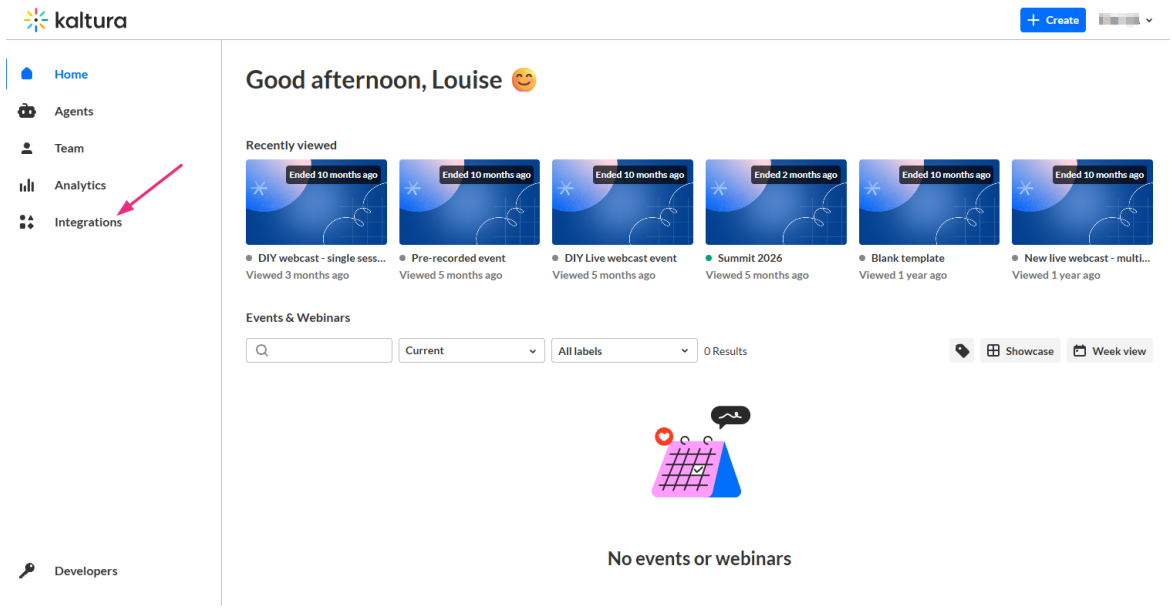
Complete the one-time setup in Salesforce. For the steps, see Set up Salesforce to receive data from Kaltura Virtual Events.

Add the Salesforce integration to your account

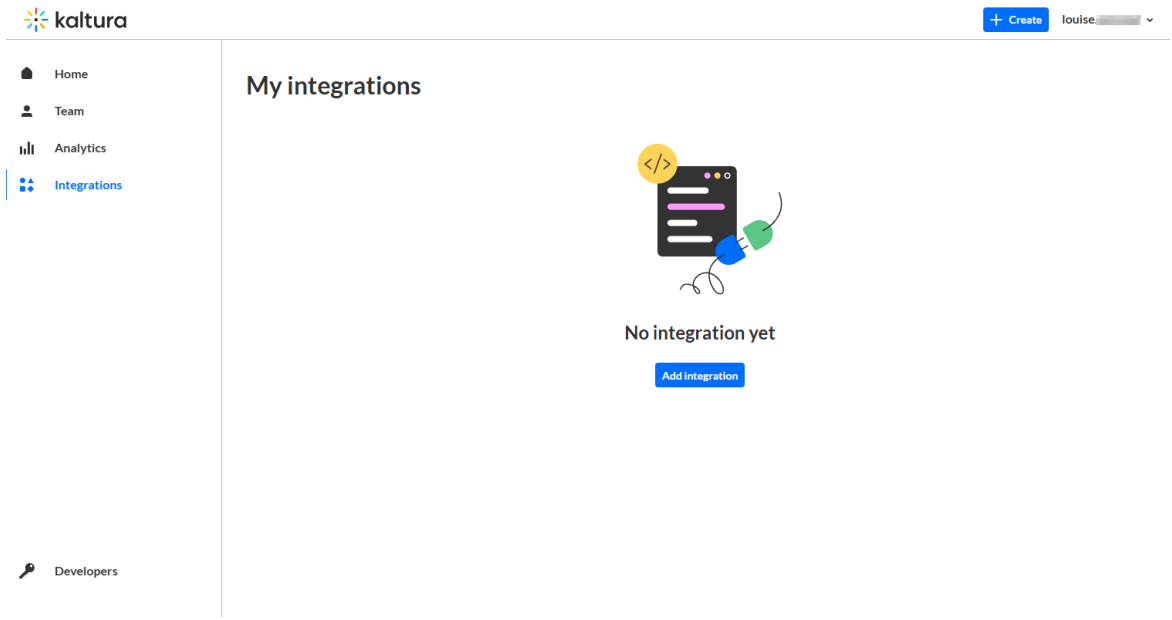
Create one integration for each event template, because each template has its own registration form. After you set up an integration for a template, you can enable it for all events created from that template.

1. On the Kaltura Virtual Events home page, select **Integrations** in the left panel.

Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.



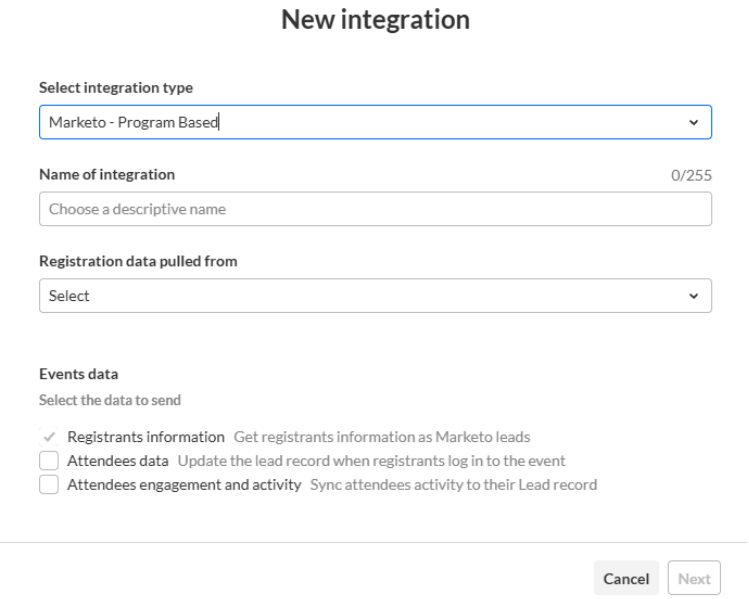
The **My integrations** page opens.



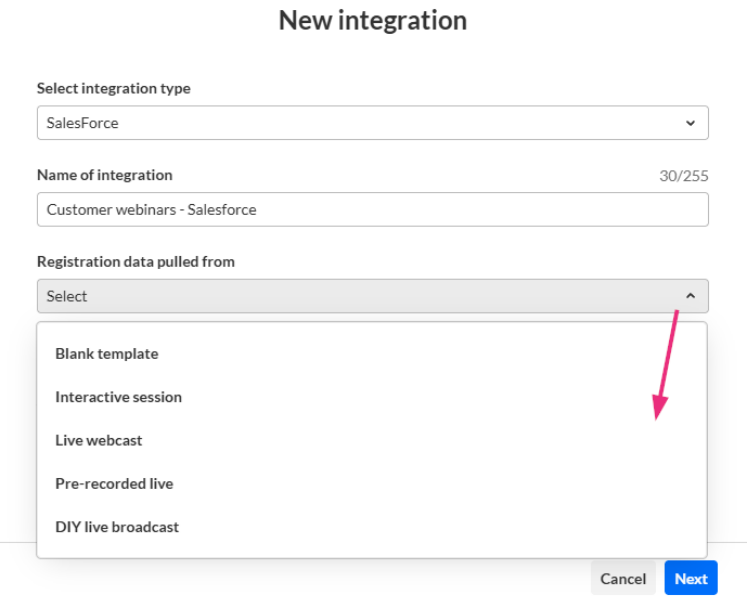
2. Select **Add integration**.

   The **New integration** window opens.

Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.



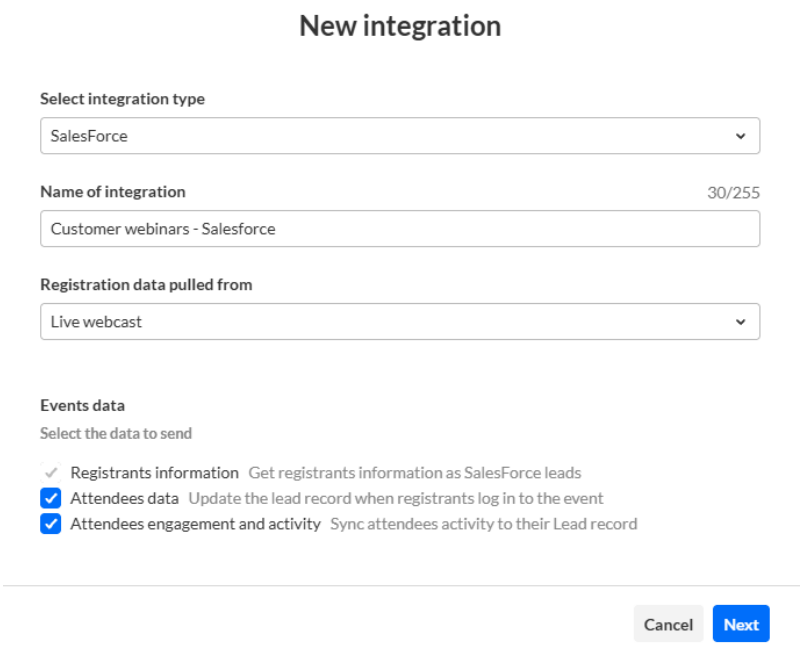
3. In the **Select integration type** dropdown, select **Salesforce**.
4. In the **Name of integration** box, enter a descriptive name.
5. In the **Registration data pulled from** dropdown, select the event template that your events use.



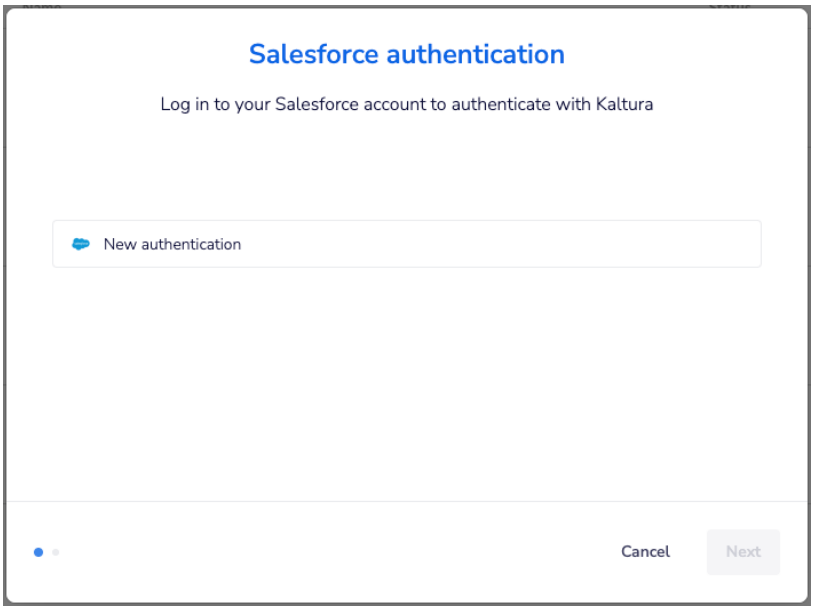
6. In the **Events data** section, select the data to send to Salesforce:
   - **Registrants information**: Selected by default. You can't clear it, because it creates the lead in Salesforce.
   - **Attendees data**: Select to update the lead record when registrants log in to the event.

Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.

- **Attendees engagement and activity**: Select to sync attendee activities to their lead record. This process is manual. After the session ends, event organizers can select **Sync engagement data** to update the lead with engagement data, such as viewing rate or reactions.

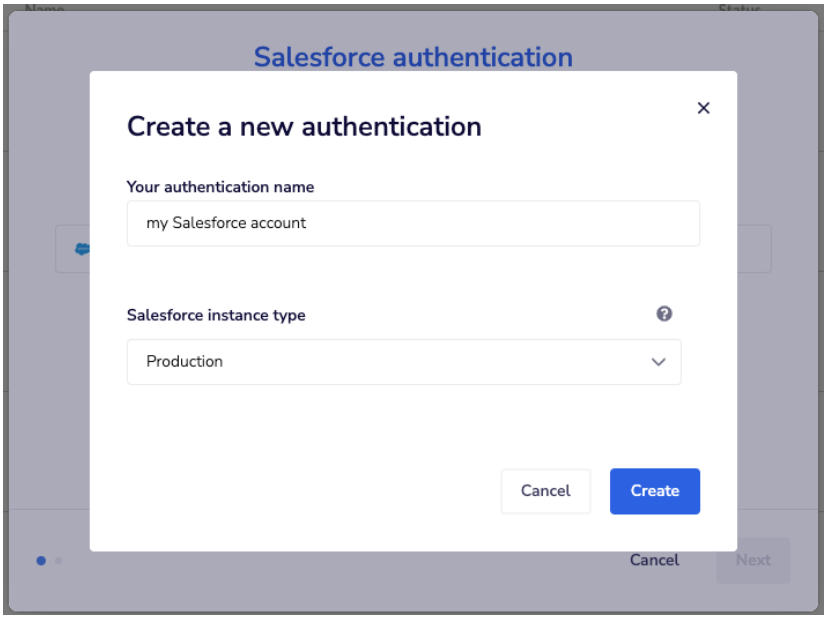


7. Select **Next**.
   The **Salesforce authentication** window opens.

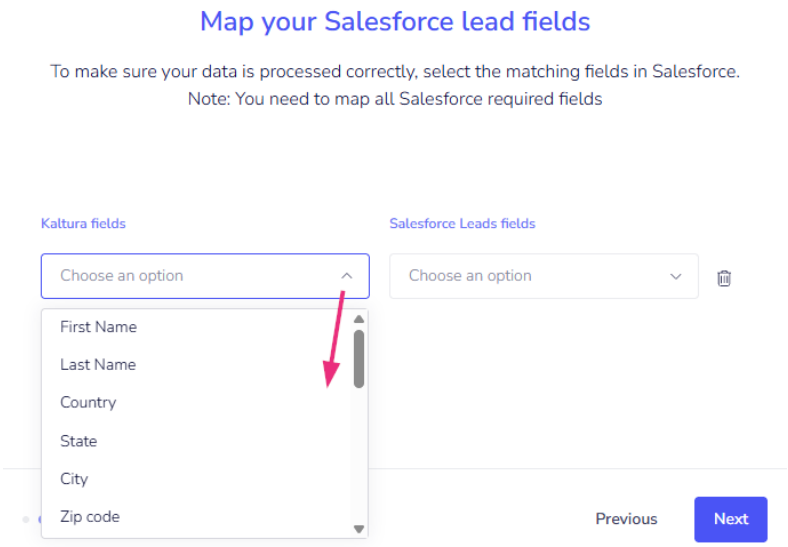


8. Select **New authentication**. You do this one time. After that, your account is selected automatically, and you only select **Next**.
   The **Create a new authentication** box opens.

Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.

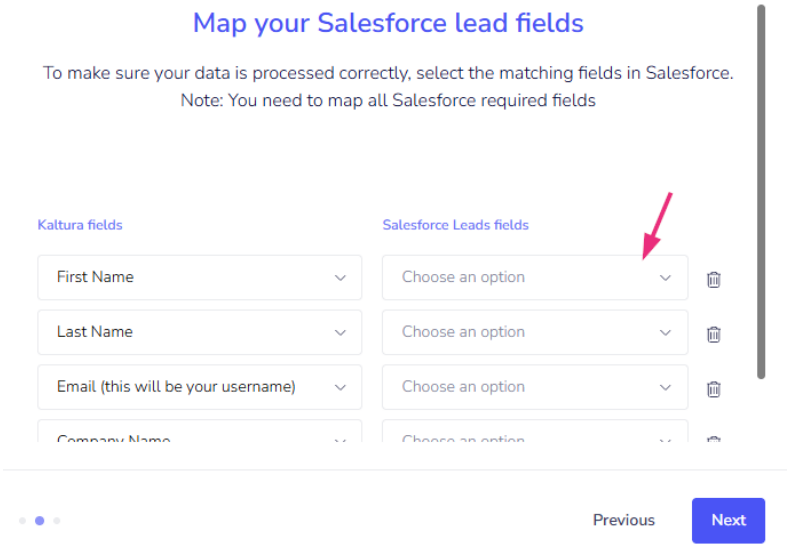


9. In the **Your authentication name** field, enter a name for the authentication.
10. In the **Salesforce instance type** dropdown, select the type that matches your Salesforce account.
11. Select **Create**.
12. Log in to your Salesforce account.
13. Allow the required permissions to authenticate with Kaltura.
    The **Map your Salesforce lead fields** window opens.
14. Choose the Kaltura fields from the drop-down options.



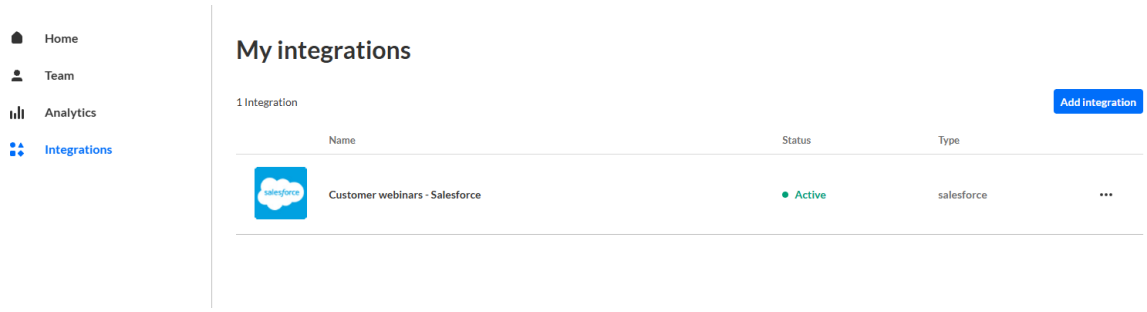
15. For each Kaltura field, select the matching field in **Salesforce Leads fields**. You must map all the required Salesforce fields.

Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.



16. Select **Next**.

The **My integrations** page shows the new integration with the status **Active**.



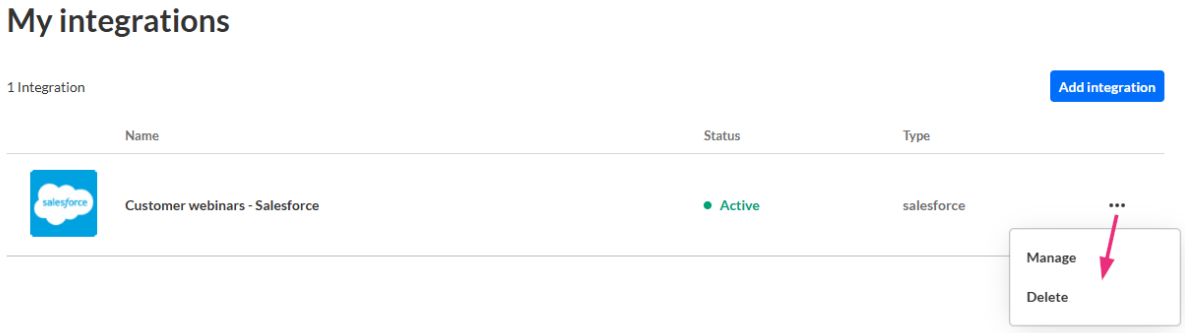
The integration doesn't send data until you enable it for an event. To enable it, see Enable the integration for a specific event below.

Manage or delete the integration

You can delete an integration only if it isn't enabled on an event.

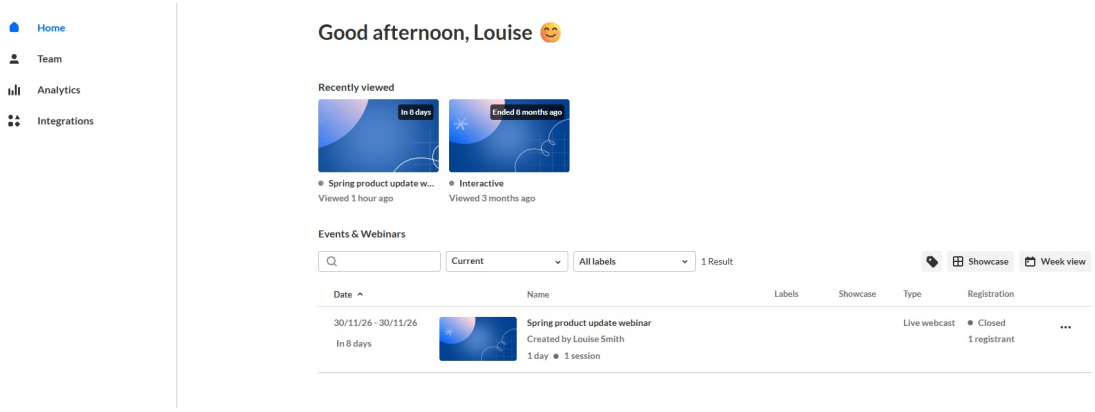
To manage or delete an integration, select the **three dots** to the right of the integration, and then select **Manage** or **Delete**.

Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.

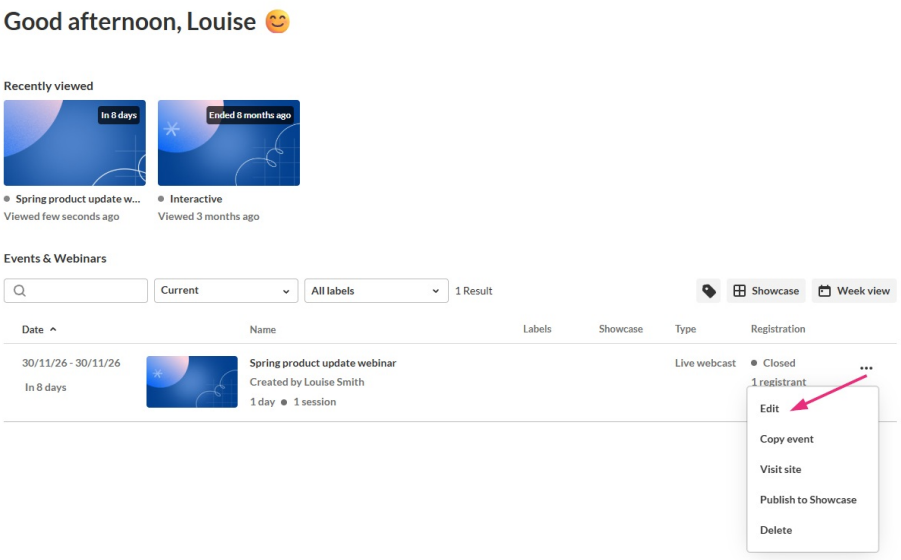


Enable the integration for a specific event

1. In the left panel, select **Home**.
   The **Home** page opens.

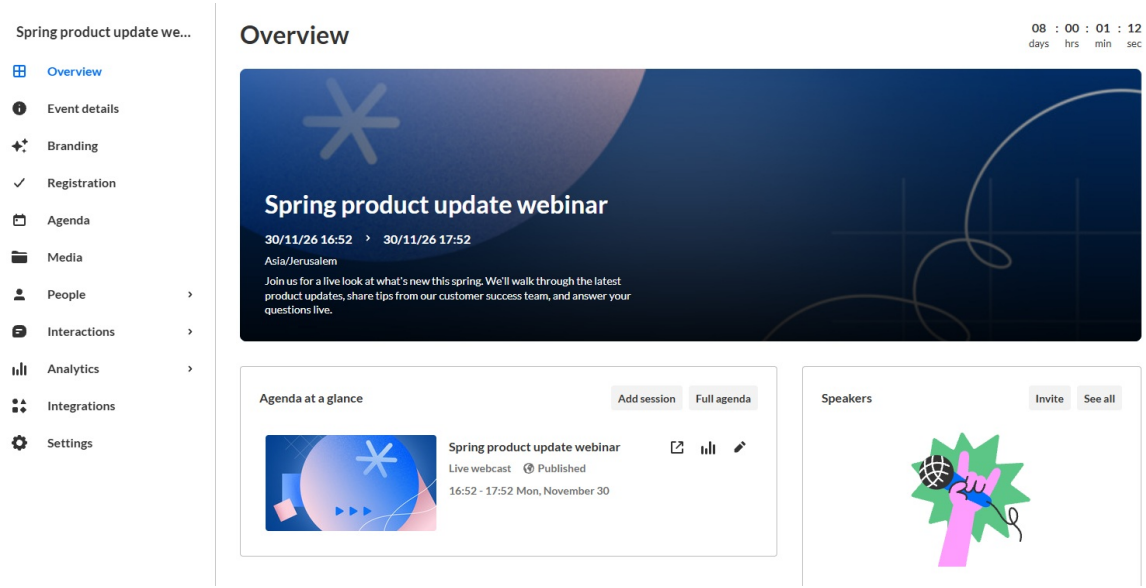


2. In the event list, select the **three dots** at the end of the event row, and then select **Edit**.

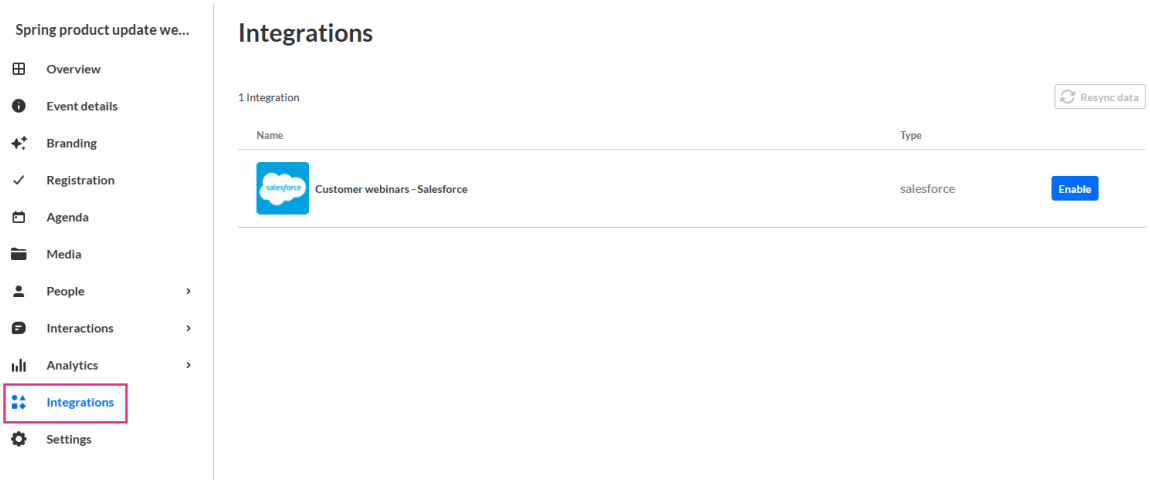


Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.

The **Overview** page of the event opens.

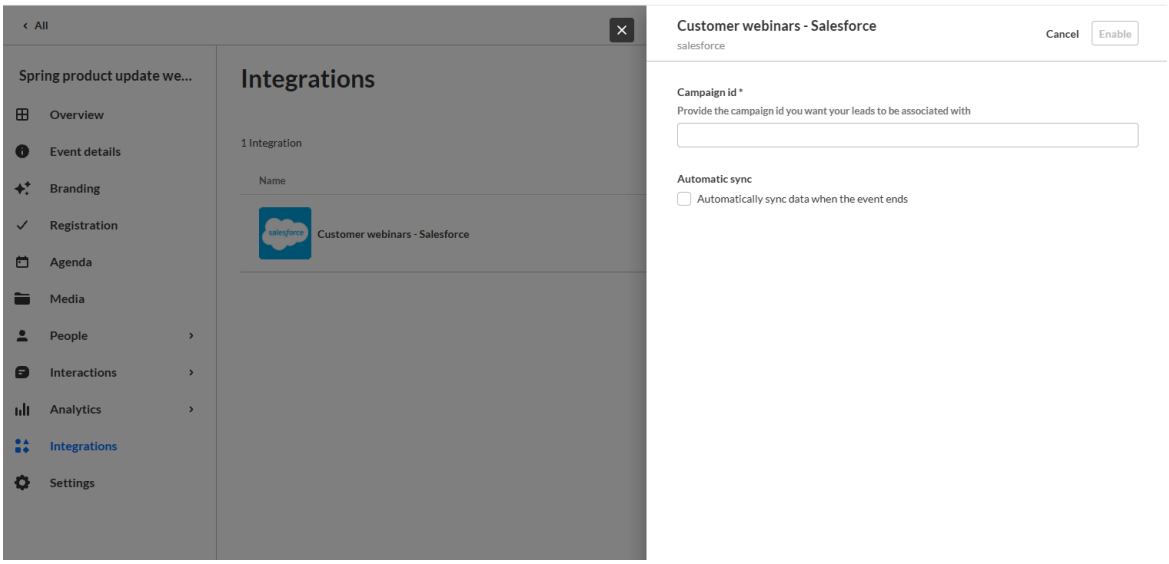


3. In the left panel, select **Integrations**.
   The **Integrations** page opens and lists the integrations that apply to this event.



4. Next to your Salesforce integration, select **Enable**.
   A panel opens on the right with the integration settings.

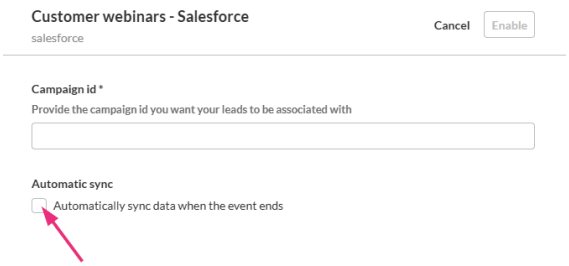
Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.



5. In the **Campaign id** box, enter the campaign ID. This associates the leads with their program in Salesforce.

   You can find the campaign ID in the URL when you select the campaign in Salesforce. For example, in `https://xxxxxx.lightning.force.com/lightning/r/Campaign/70103000000cqmPAAQ/view`, the campaign ID is `70103000000cqmPAAQ`.

6. To sync data automatically when the event ends, select the **Automatic sync** checkbox.



7. Select **Enable**.

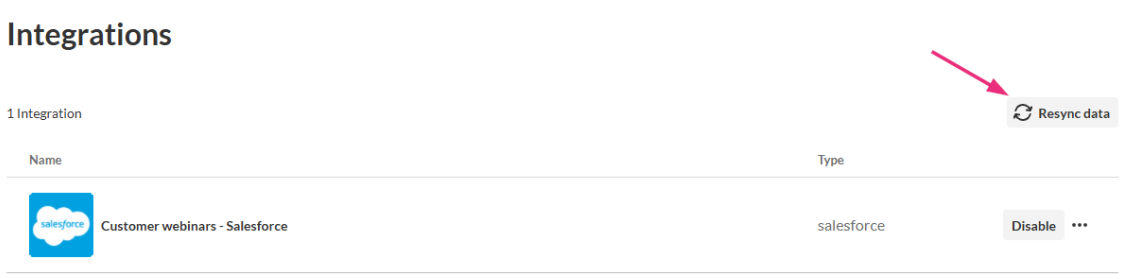
Manually sync all enabled integrations

Resync data is available after you enable an integration. Use it after a late integration setup or if a sync was incomplete.

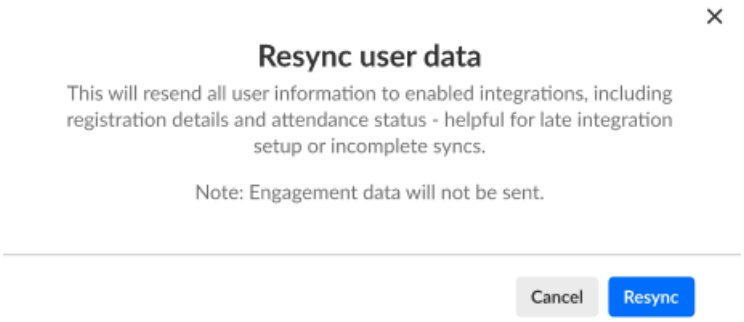
Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.

Resync data only refreshes registration and attendance information. It doesn't include engagement data.

1. On the **Integrations** page, select **Resync data**.



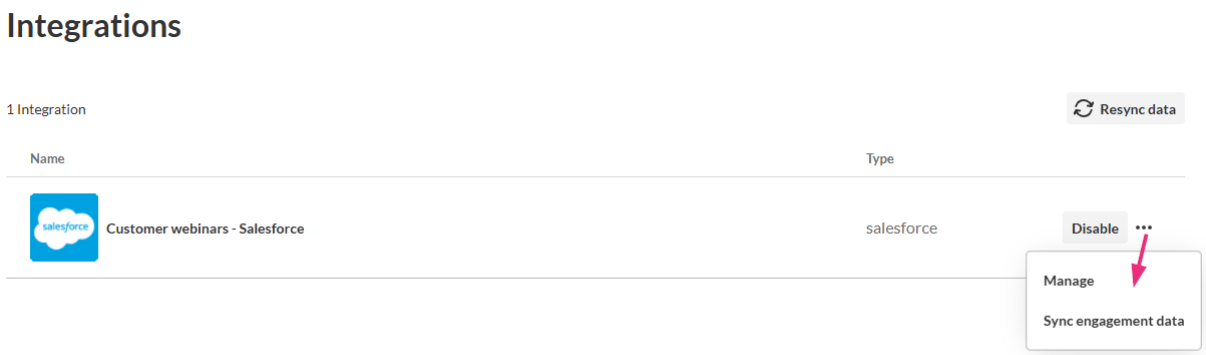
The **Resync user data** dialog opens.



2. Select **Resync**.
   A message appears to confirm that the integration data was synced successfully.

Manage or sync engagement data per integration

After you enable the integration, the Salesforce row on the **Integrations** page shows **Disable** and a **three-dot menu**.



Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.

You can do any of the following:

- Select **Disable** to stop the data sync to Salesforce for this event.
- Select the **three dots**, and then select **Manage** to edit the information that identifies this event in Salesforce, such as the campaign ID or program ID.
- Select the **three dots**, and then select **Sync engagement data** to send attendee engagement data to Salesforce and update the lead after the event is over.

For more information, see Set up Salesforce to receive data from Kaltura Virtual Events.

Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.