

# Salesforce integration for Kaltura Events

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 This article is designated for administrators.

## About

Salesforce integration for Kaltura Events allows you to receive and sync data on your event registrants and attendees from Kaltura to your Salesforce account.

Using Kaltura Salesforce integration each registrant is sent to Salesforce as a lead with their registration information which can be later updated with their attendance and engagement data.

To connect your Kaltura account to Salesforce you will first need to create an integration on your account level and then you can connect it to the different events you or your colleagues create.



The screens shown here represent a multi-session event. The same actions apply when working with single session.

## Before you start

- Make sure to follow the steps detailed on <https://knowledge.kaltura.com/help/kaltura-data-sharing-integration-for-salesforce-how-to-set-up-salesforce> for a one time setup of campaign members custom field, statuses, and custom object for engagement data.
- For each event registration form, you will map the fields to your Salesforce lead record. Therefore, you need to create an integration per event template. For example, if you have five event templates, you need to create five integrations and map the different fields on your registration form to your Salesforce lead record. Once the integration is set for the template, you can use it on all events created from this template.
- Make sure you map **ALL** the required fields on your Salesforce lead form so that leads will be submitted successfully.

## Integration settings

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

1. Account Level
2. Event Level

## Account level

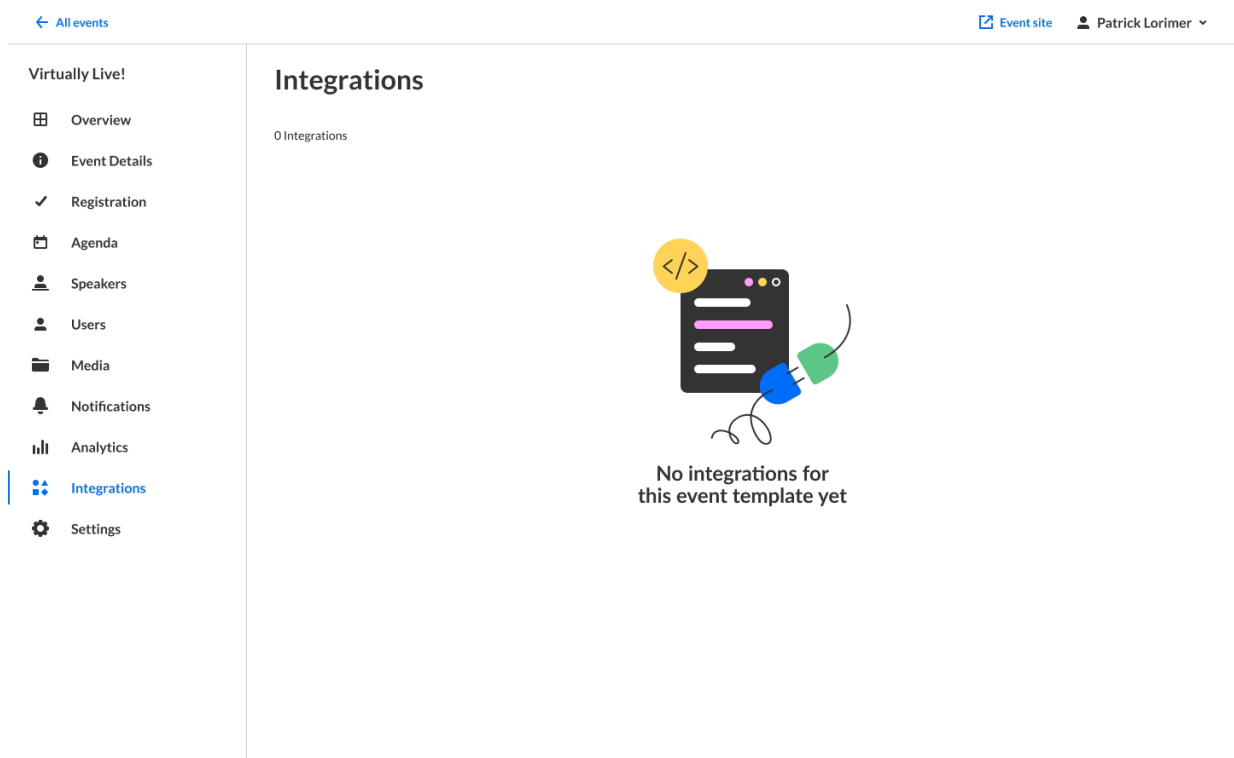
The account level may be set up so that you can connect different events to use for the Salesforce integration.

## Set up the Salesforce integration on the account Level

Each integration needs to map the registration form fields to the lead records on Salesforce. 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.
2. Click **Add Integration**. 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.



The New Integration window is displayed.

### New integration

**Select integration type**

Salesforce ▼

**Name of integration** 10/255

Live event

**Registration data pulled from**

DIY Live Broadcast ▼

**Events data**

Select the data to send

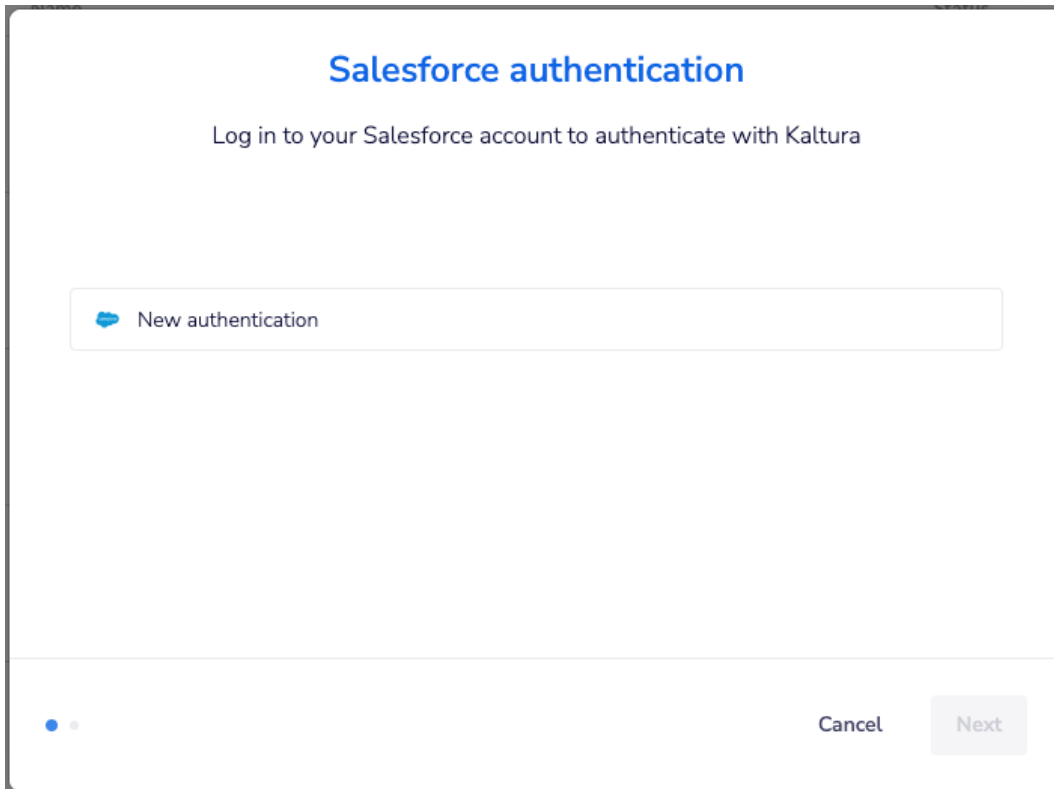
☐ **Registrants information** Get registrants information as Salesforce leads

☒ **Attendees data** Update the lead record when registrants log in to the event

☒ **Attendees engagement and activity** Sync attendees activity to their Lead record


Cancel
Next

3. Select integration type, **Salesforce**
4. Enter a **Name** for the integration. We recommend using a descriptive name, for example Interactive Salesforce Integration.
5. Select the event template **Data Origin Template**. Each event template has its own registration form and needs to be created as separate integration.
6. Select the Kaltura Events Data you would like to send to Salesforce.
  - **Registrants Information** - (lead or registrants' information) Checked by default to get registrants information as Salesforce leads. The registrant information is mandatory. That is the part that creates the lead in Salesforce.
  - **Attendees Data** - Check to update the lead record that was created when registrants login to the event. The lead record is updated with the attendants information.
  - **Attendees Engagement and Activity** - Check to be able to sync attendees activities to their lead record. This process is manual. When the session is over and event organizers want to obtain attendees' engagement information they may click Sync Engagement Data to update the lead with their engagement data such as viewing rate or reactions.
7. Click **Next**.
8. Click **New authentication**. This is done once, and then your account will be auto selected and you can just click **Next**.



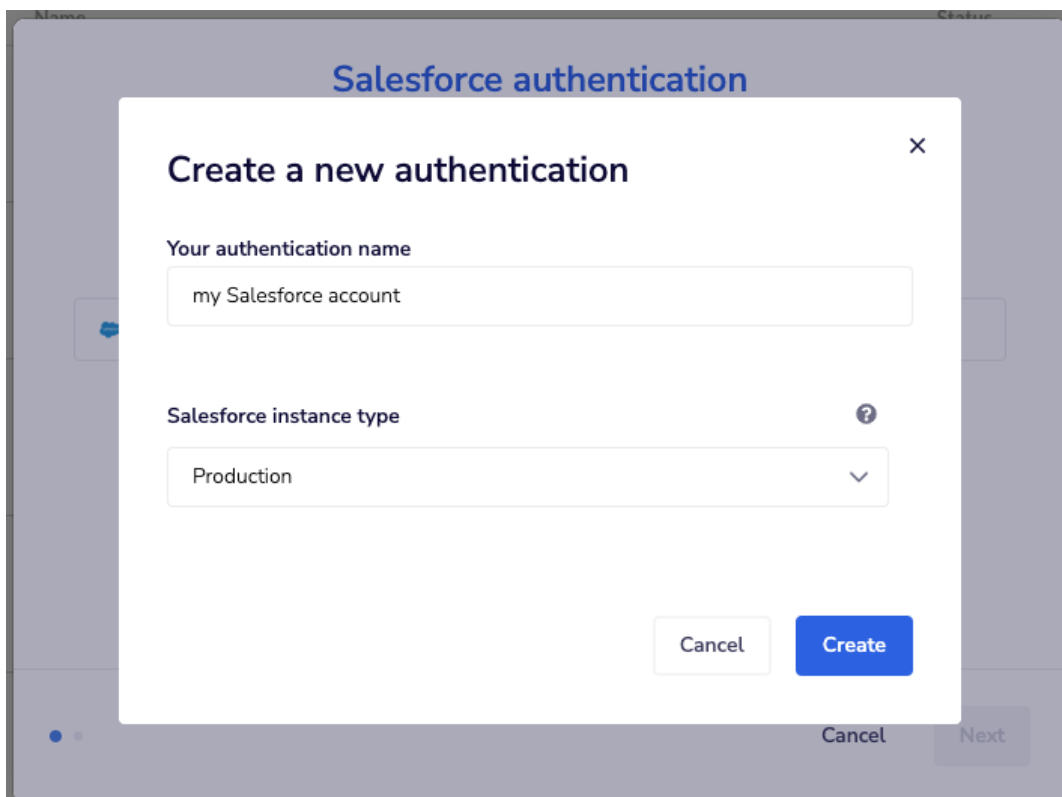
**Salesforce authentication**

Log in to your Salesforce account to authenticate with Kaltura

 New authentication

Cancel Next

- Click **Create** and log in to your Salesforce account and allow required permissions to authenticate with Kaltura.



**Salesforce authentication**

**Create a new authentication** ×

Your authentication name

my Salesforce account

Salesforce instance type ?

Production

Cancel Create

Cancel Next

- Map the different fields on Kaltura registration form to Salesforce Lead fields.

## Map your Salesforce lead fields

To make sure your data is processed correctly, select the matching fields in Salesforce.  
Note: You need to map all Salesforce required fields

**Kaltura fields**

Email (this will be your username) ▼

First Name ▼

[Add a new mapping](#)

**Salesforce fields**

Email ▼ ✕

First Name ▼ ✕

Previous
Finish


For example, first name, last name, email, and company. These fields must be mapped to a Salesforce record.

11. Click **Finish**.



Salesforce has required fields that Kaltura must be aware of so the leads will be submitted successfully. The admin must make sure Salesforce required fields are mapped to Kaltura fields and comply with any other validation rules set on their Salesforce account.

The new integration is displayed.



+ Create
EP Training Team ▼

- Home
- Team
- Analytics
- Integrations

### My integrations

5 Integrations Add integration

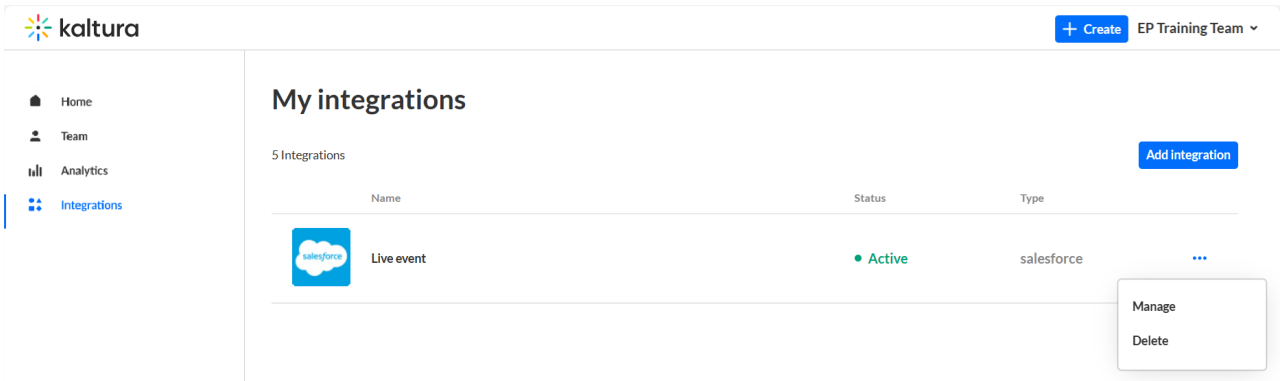
| Name   | Status   | Type       |   |
|--|----------|------------|---|
| <div style="display: flex; align-items: center;"> <span>Live event</span> </div> | ● Active | salesforce | ⋮ |

Manage and/or delete the Salesforce integration on the account level

You can then 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 template/registration form. Only Active integrations may be enabled on events. If an integration is disabled - you may have missing information on the integration, such as incomplete field mapping.




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

## Event Level

### Setup a Kaltura Salesforce integration for a specific event

1. From the event list, Select Edit from the actions menu to edit the event to which you would like to add the integration.



[+ Create](#)

Patrick Lorimer

Home

Team

Analytics

Integrations

Good morning, Patrick

Recently viewed

Kaltura Academy

Viewed 40 minutes ago

Training day

Viewed 3 days ago

Virtual Summit 2025

Viewed 1 day ago

Product palooza

Viewed 3 days ago

SKO 2023

Viewed 30 minutes ago

Virtually Live!

Viewed 3 days ago

Events & Webinars






Current

All labels

4 Results

Showcase

Week view

| Date                                 | Name   | Labels         | Showcase | Type                | Registration   |
|--------------------------------------|--|----------------|----------|---------------------|--|
| 13/05/24 - 02/07/25<br>Happening now |  <div>Kaltura Academy</div> <div>Created by Alexander Benj...</div> | wavespace a... |          | Webinar             | <div>Open</div> <div>172 Registrants</div>   |
| 21/05/24 - 01/04/25<br>Happening now |  <div>Training day</div> <div>Created by Eric grant</div>           |                |          | Interactive session | <div>Edit</div> <div>Copy event</div> <div>Visit site</div> <div>Publish to Showcase</div> <div>Delete</div> |
| 01/10/24 - 05/06/25<br>Happening now |  <div>Virtual Summit 2025</div> <div>Created by Eric grant</div>    | Product +2     |          | Pre-recorded        |  |
| 22/10/24 - 30/06/25<br>Happening now |  <div>Product palooza</div> <div>Created by Eric grant</div>        | Product +2     |          | Pre-recorded        |  |
| 06/11/24 - 05/11/25<br>Happening now |  <div>SKO 2023</div> <div>Created by Eric grant</div>               | Product +2     |          | Pre-recorded        | <div>Open</div> <div>172 Registrants</div>   |

The Event window displays.

< All

Sales Kick-off 2024

Overview

Event details

Branding

Event site editor

Registration

Agenda

Media

People

Interactions

Analytics

Integrations

Settings


Event site

EPNVD 5112732

Overview

01 : 23 : 25 : 40

days hrs min sec



Sales Kick-off 2024


26/4/24 9:00 AM > 26/4/24 12:00 PM

America/New\_York

Agenda at a glance

Add session

Full agenda



Sales Kick-off 2024


DIY live webcast Private

9:00 AM - 10:00 AM Tue, April 16

Speakers

Invite

See all



No speakers yet

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

← All

Event site Patrick Lorimer

Virtually Live!

Overview

Event Details

Registration

Agenda

Speakers

Users

Media

Notifications

Analytics




Integrations

Settings

Integrations

3 Integrations

Resync data

| Name   | Type       |         |
|--|------------|---------|
|  External Webinar Connector | Marketo    | Disable |
|  HubSpot ENT                | HubSpot    | Enable  |
|  Salesforce                 | Salesforce | Disable |

### 3. Click **Enable**.

Sale force first pick interactive

salesforce

Cancel

Enable


Campaign id \*

Provide the campaign id you want your leads to be associated with

Automatic sync

☐ Automatically sync data when the event ends

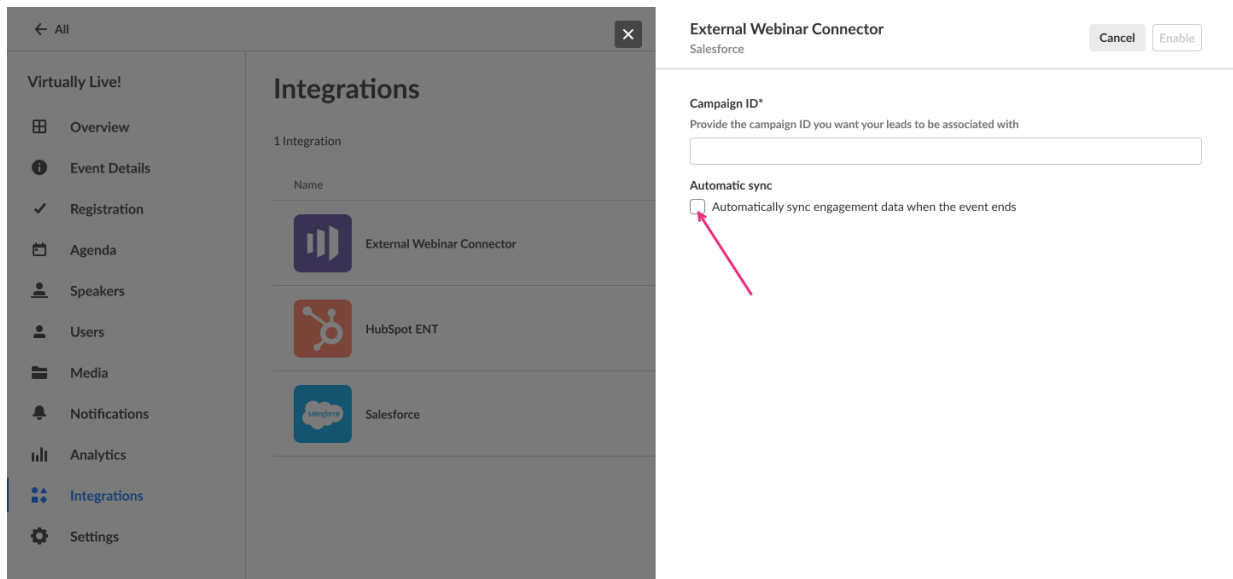
### 4. Enter the Campaign id. This will associate the leads to their relevant program on Salesforce.



You can find the Campaign id in the URL when you have the campaign selected. For example, <https://xxxxxx.lightning.force.com/lightning/r/Campaign/70103000000cqmqPAAQ/view>, 70103000000cqmqPAAQ is your campaign ID.

### 5. Click to enable **Automatic sync** if you would like to automatically sync data one hour after the event ends.

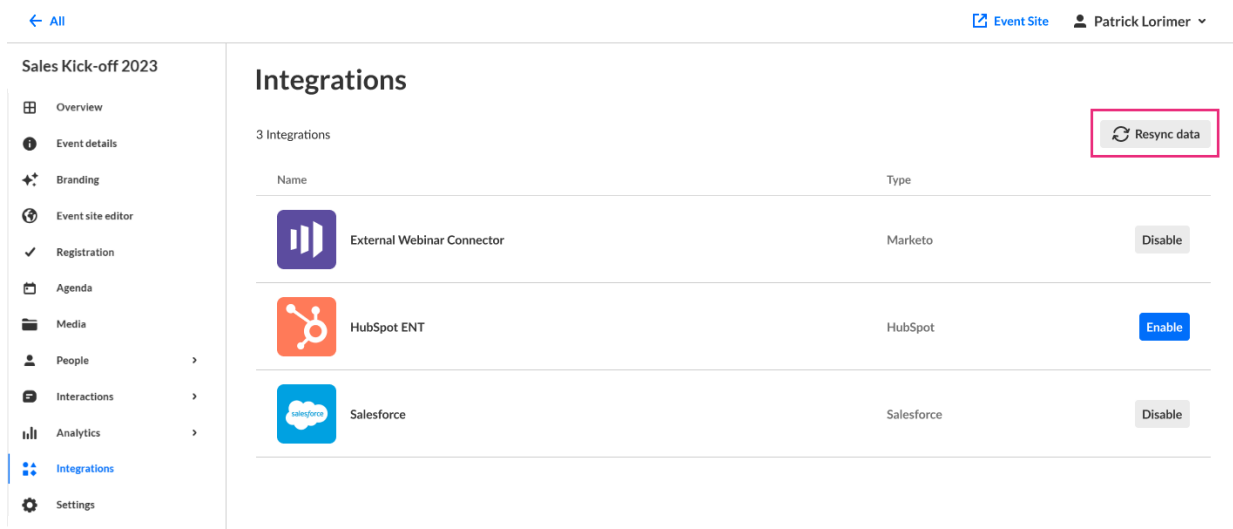
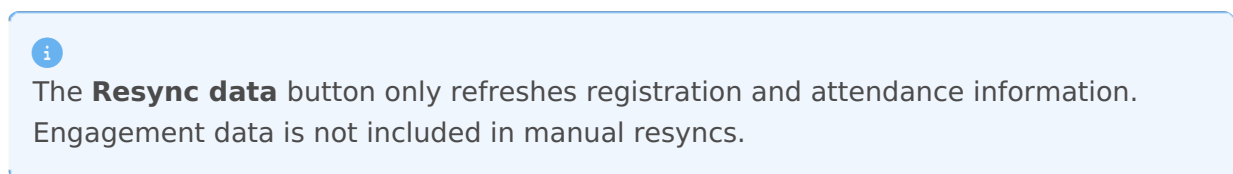




6. Click **Enable**. You receive confirmation that the integration was enabled successfully.

## Manually sync all enabled integrations

1. Click the **Resync data** button to manually sync all active/enabled integrations.



2. Click **Resync** to confirm your action.

×

### Resync user data

This will resend all user information to enabled integrations, including registration details and attendance status - helpful for late integration setup or incomplete syncs.

Note: Engagement data will not be sent.

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Cancel Resync

You receive confirmation that the integration data was successfully synced.

## Manage or sync engagement data per integration

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

Event Site  Patrick Lorimer ▾

 Resync data

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Disable

...

Manage

Sync engagement data

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

- Click **Disable** to disable an integration. Disabling an integration stops the data synchronization to Salesforce for this event.
- Click **Manage** to edit the additional info / Salesforce identifiers (e.g., campaign/program ID) for this event.
- Click **Sync engagement data** to send attendees engagement data and update the lead with additional insights once the event is over.



For more information about the Salesforce Integration, see [Kaltura Data Sharing Connector for Salesforce](#).