

Salesforce integration for Kaltura Virtual Events

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 This article is designated for administrators.

About

Salesforce integration for Kaltura Virtual 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 Virtual Events management interface.

1. Account Level
2. Event Level

Account level

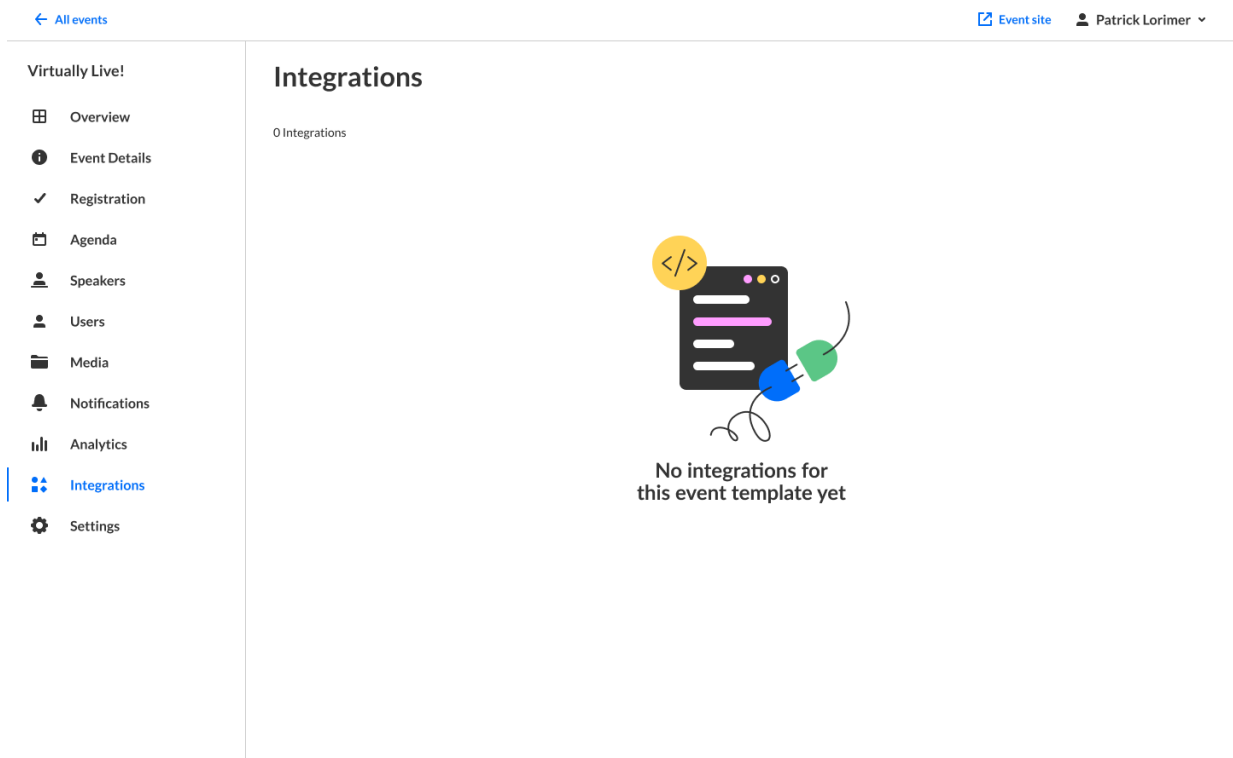
The account level may be set up so that you can connect different events to use for the Salesforce integration.

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 Virtual Events registration form is set up by the template per event.

To set up an integration

1. On the Kaltura Virtual 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▼

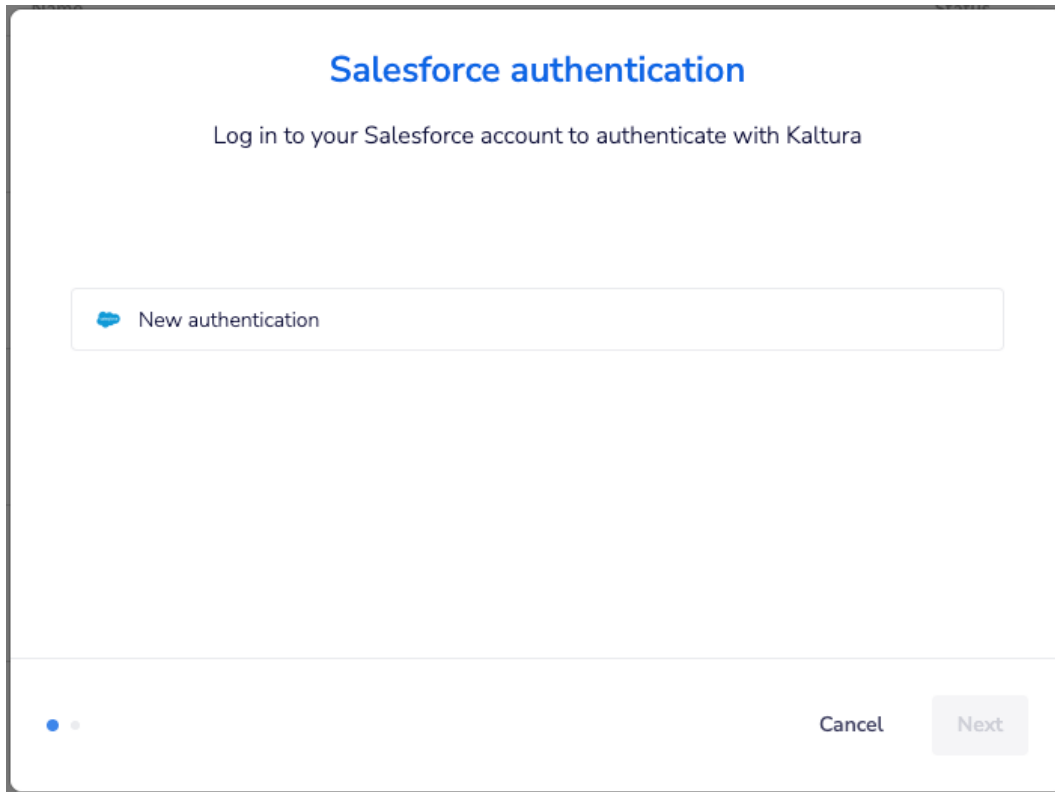
Events data

Select the data to send

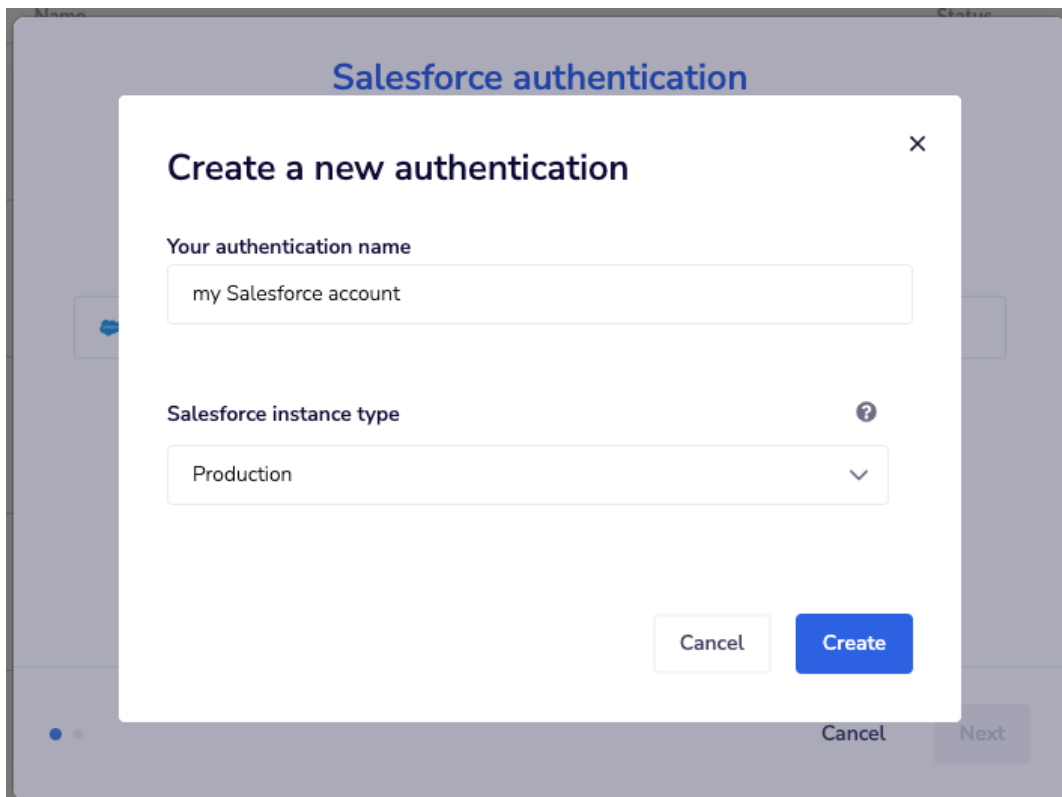
- Registrants information** Get registrants information as Salesforce leads
- Attendees data** Update the lead record when registrants log in to the event
- Attendees engagement and activity** Sync attendees activity to their Lead record

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 Virtual 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**.



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



10. 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

Add a new mapping

Salesforce fields

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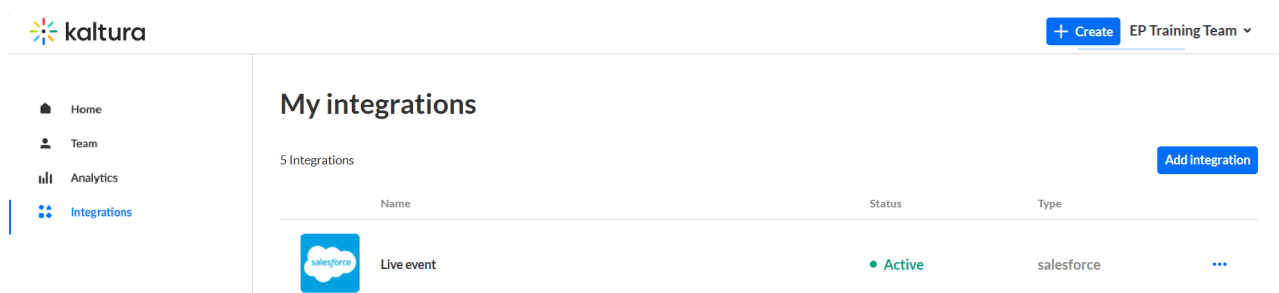
Previous
Finish

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.



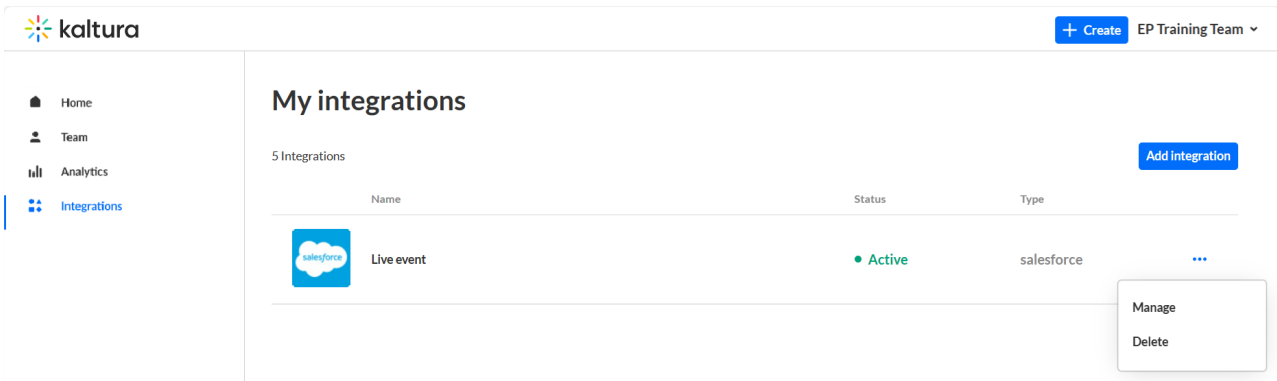
The screenshot shows the Kaltura user interface. On the left is a navigation sidebar with 'Integrations' selected. The main content area is titled 'My integrations' and shows a table with 5 integrations. One integration is visible: 'Live event' with a Salesforce icon, status 'Active', and type 'salesforce'. There is an 'Add integration' button in the top right of the table area.

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.



The screenshot displays the 'My integrations' interface. At the top, there is a '+ Create' button and a dropdown menu for 'EP Training Team'. The main content area is titled 'My integrations' and shows '5 Integrations'. A table lists the integrations with columns for Name, Status, and Type. One integration is visible: 'Live event' (Salesforce) with a status of 'Active'. A dropdown menu is open for the 'Live event' row, showing 'Manage' and 'Delete' options. An 'Add Integration' button is located in the top right corner of the table area.

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.

kaltura + 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

Search: Current All labels 4 Results Showcase Week view

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

The Event window displays.

< All Event site EP NVD 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 Edit details

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

2. 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 Cancel Enable


salesforce

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

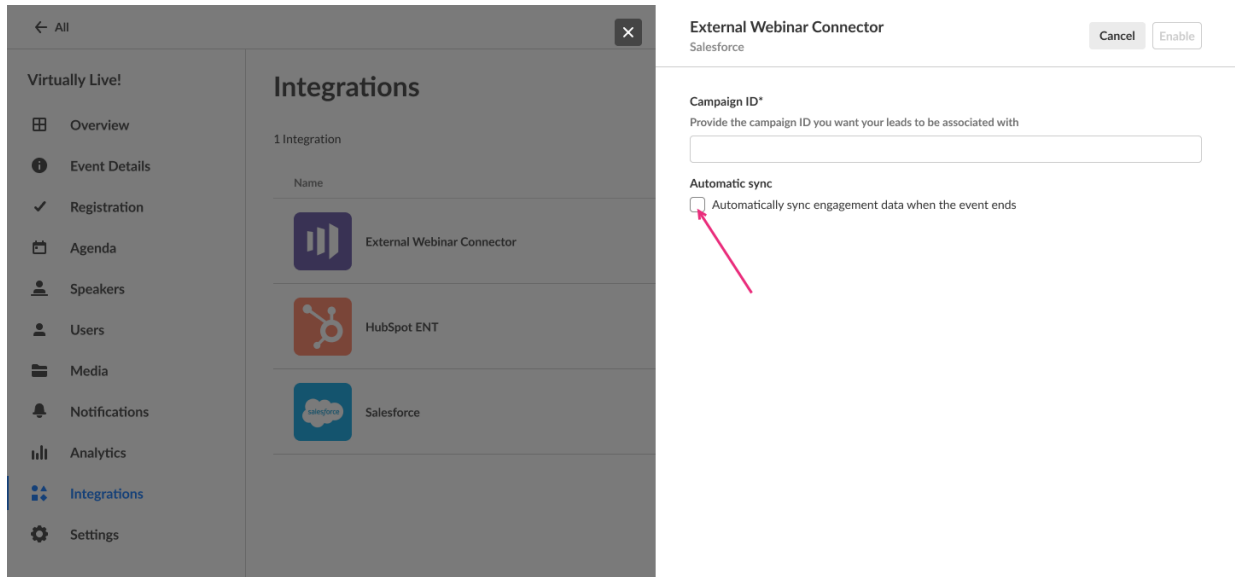
Automatic sync

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/70103000000cqmPAAQ/view>, 70103000000cqmPAAQ is your campaign ID.

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

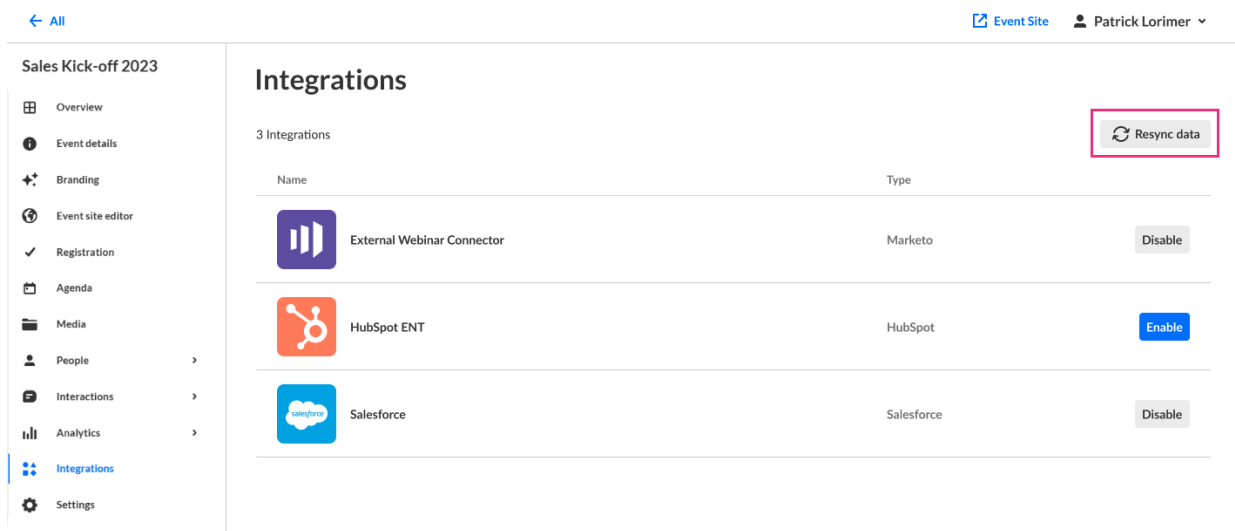


6. Click **Enable**. You receive confirmation that the integration was enabled successfully.

Manually sync all enabled integrations

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

The **Resync data** button only refreshes registration and attendance information. Engagement data is not included in manual resyncs.



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

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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.

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

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](#).