Kaltura data sharing integration for Salesforce - How to set up Salesforce

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This article is designated for administrators.

About

This article will walk you through setting up Salesforce for Kaltura data sharing integration.

Campaign members setup

Status

The Campaign Member object is used to represent an event attendee from Kaltura Events.

To allow Kaltura to update the campaign members on their registration/attendance status, you need to first create the statuses sent from Kaltura for your campaign members. Add the following Kaltura statuses to your campaign members statuses:

Status
Created
Invited
Registered
Confirmed
autoConfirmed
Attended
Participated
Blocked
Un-registered

You can set it up one time and use Clone with Related (Clone on classic) or Flows to create new campaigns for new events. Refer to Salesforce docs to learn more about campaign member statuses.

Important Note -

For the Salesforce integration third party mapping, Kaltura passes the most granular/detailed status information available. (See the list of statuses shown below.) For

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example, what displays as "Registered" on the Kaltura Events user interface, is displayed in more granularity on Salesforce as "Confirmed email" or "Registered no confirmation required". Marketers can harness this granularity to send appropriate emails before, during, and after the event.

List of statuses displayed on Salesforce:

SSO login

Invited by team member (displayed as "Invited" on Kaltura Events user interface)

Invited by team member to register (displayed as "Invited" on Kaltura Events user interface)

Registered

Confirmed email (displayed as "Registered" on Kaltura Events user interface)

Registered no confirmation required (displayed as "Registered" on Kaltura Events user interface)

Pre-event visit (displayed as "Attended" on Kaltura Events user interface)

During-event visit (displayed as "Attended" on Kaltura Events user interface)

Blocked

Un-registered

Custom Field

In addition to campaign member statuses, edit the campaign member object and add a new custom field named "external_id". The purpose of this field is to hold a value composed of the `${campaign id}_ ${lead id}`. for example: 70103000000cnFXAAY_00Q0300000AczgfEAB. The minimum size of the field will be at least 50 characters and max 200.

Make sure to set it up as required, unique (case insensitive) and External ID, for example:

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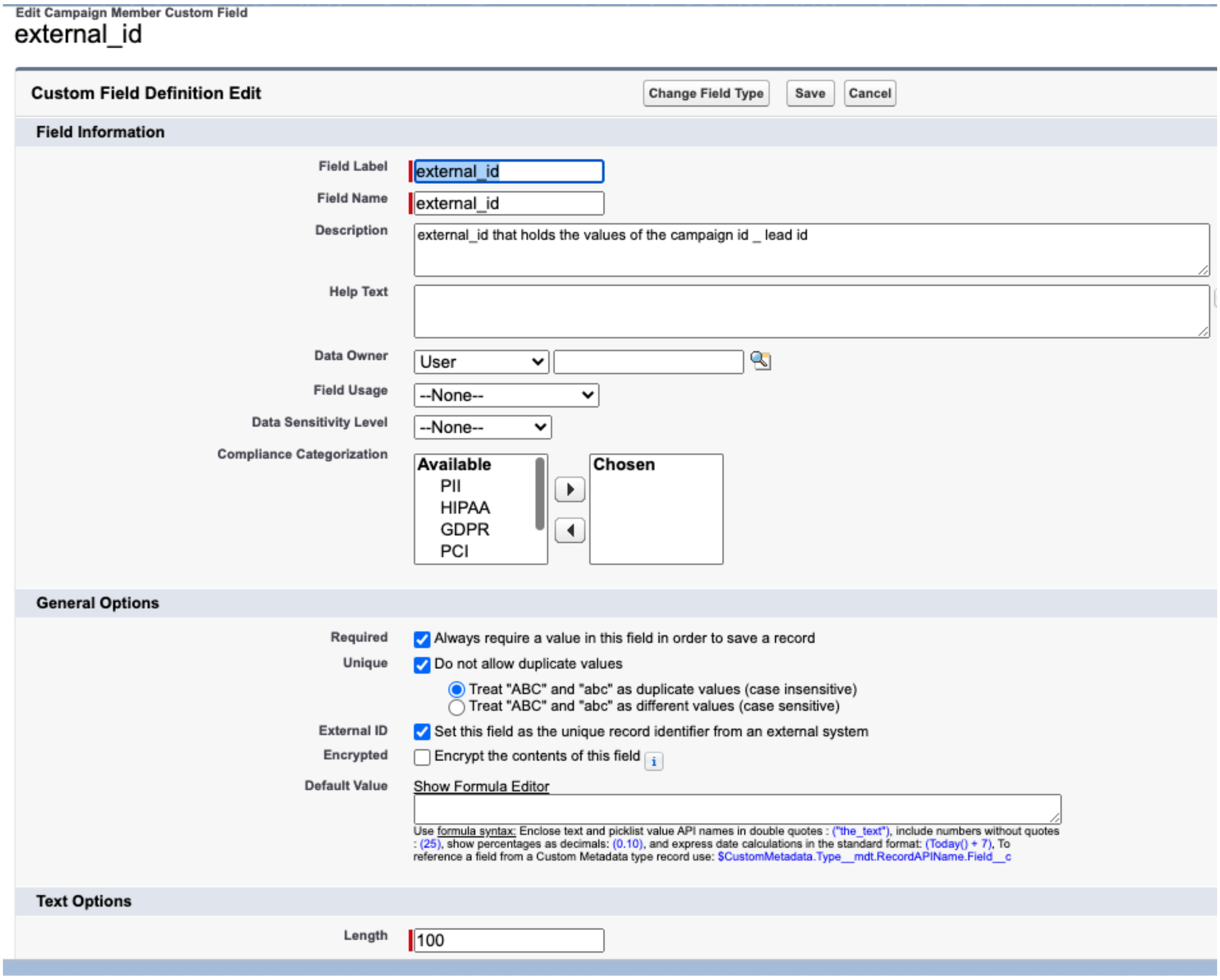

Refer to Salesforce docs to learn more about creating custom fields.

Setup of Custom Object

Refer to the Salesforce docs to learn more creating a custom object.

The various actions an attendee carries out during their interaction at an event are shared with Salesforce as activities. Kaltura captures the actions that an attendee takes and can securely share the information with Salesforce so marketers can better score leads, trigger campaigns, share timely and relevant communications, and more.

Use the following table to create the Custom object in your Salesforce account according to the Salesforce documentation.

To get Kaltura Events user engagement data, you **must** create a new custom object and use "UserSessionEngagement" as the object name. Add the following fields:

Custom object name: UserSessionEngagement

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Field	Data Type	Description
campaign_member	Text(100)	Holds the ID of the corresponding Campaign Mem
Lead	Lookup(Lead)	Lookup to a lead
entry_id	Text(11)	The ID of the Kaltura entry which was watched
entry_name	Text(200)	The name of the Kaltura entry which was watched
email	Email	The email of the user who attended the session.
user	Text(200)	Kaltura User ID
channel_id	Number(18, 0)	The id of channel the content was consumed from
channel_name	Text(200)	The name of the channel the content was consum
plays	Number(18, 0)	Number of plays
vod_minutes_viewed	Number(16, 2)	Amount of minutes vod content was consumed
live_minutes_viewed	Number(16, 2)	Amount of minutes live content was consumed
total_vod_completion_rate	Number(16, 2)	Vod content completion rate
no_live_engagement_rate	Number(16, 2)	Percentage of viewing time that the tab is not in fc
low_live_engagement_rate	Number(16, 2)	Percentage of viewing time that the tab is in focus
fair_live_engagement_rate	Number(16, 2)	Percentage of viewing time that the tab is not in fc
good_live_engagement_rate	Number(16, 2)	Percentage of viewing time that the tab is in focus
high_live_engagement_rate	Number(16, 2)	Percentage of viewing time that the tab is in focus
clap_clicked_count	Number(18, 0)	Amount of times the user clicked on clap reaction
heart_clicked_count	Number(18, 0)	Amount of times the user clicked on heart reactior
think_clicked_count	Number(18, 0)	Amount of times the user clicked on think reactior
wow_clicked_count	Number(18, 0)	Amount of times the user clicked on wow reaction
smile_clicked_count	Number(18, 0)	Amount of times the user clicked on smile reactior

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