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

Last Modified on 01/13/2025 4:16 pm IST

> 🔒 **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

---

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:

Edit Campaign Member Custom Field
external_id

Custom Field Definition Edit	Change Field Type	Save	Cancel

Field Information

Field Label: external_id

Field Name: external_id

Description: external_id that holds the values of the campaign id _ lead id

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization:

Available	Chosen
PII	
HIPAA	
GDPR	
PCI	

General Options

Required: ☑ Always require a value in this field in order to save a record

Unique: ☑ Do not allow duplicate values
- ◉ Treat "ABC" and "abc" as duplicate values (case insensitive)
- ◯ Treat "ABC" and "abc" as different values (case sensitive)

External ID: ☑ Set this field as the unique record identifier from an external system

Encrypted: ☐ Encrypt the contents of this field ⓘ

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7), To reference a field from a Custom Metadata type record use: $CustomMetadata.Type__mdt.RecordAPIName.Field__c

Text Options

Length: 100

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

Setup of Custom Object

Refer to the Salesforce docs to learn more about how to create 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

Field	Data Type	Description
		Holds the ID of the

campaign_member	Text(100)	corresponding Campaign Member
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 the channel the content was consumed from
channel_name	Text (200)	The name of the channel the content was consumed from
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 focus, player is on mute
low_live_engagement_rate	Number (16,2)	Percentage of viewing time that the tab is in focus, player is on mute
fair_live_engagement_rate	Number (16,2)	Percentage of viewing time that the tab is not in focus, sound is on
good_live_engagement_rate	Number (16,2)	Percentage of viewing time that the tab is in focus, sound is on
high_live_engagement_rate	Number (16,2)	Percentage of viewing time that the tab is in focus, player is in full screen

		screen
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 reaction
think_clicked_count	Number (18,0)	Amount of times the user clicked on think reaction
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 reaction
answered_polls	Number (18,0)	The number of polls the user responded
messages_sent_group	Number (18,0)	The number of messages the user sent in group chat
qna_threads	Number (18,0)	The number of threads of the user
combined_live_engaged_users_play_time_ratio	Number (16,2)	A number which represents the viewing engagement of the attendee
add_to_calendar	Number (18,0)	The number of times the user clicked add to calendar
mic_on	Number (16,2)	Total time mic is on
cam_on	Number (16,2)	Total time camera is on
		Amount of times the user

total_reactions_activity	Number (18,0)	clicked on any type of reaction
raise_hand	Number (18,0)	The number of times the user raised hand in this session

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

Custom Object Name: Kaltura_User_Polls_c

Field	Data Type	Description
campaign_member	Text (100)	Holds the ID of the corresponding Campaign Member
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
poll_1_type	Text (255)	The visual type of this poll, i.e., rating scaled, crowd vote, etc.
poll_1_answer	Text (255)	User-submitted answer to the poll. Up to 255 characters.
poll_1_question	Text (255)	Client-determined poll question asked to the audience. Up to 255 characters.
poll_2_type	Text (255)	The visual type of this poll, i.e., rating scaled, crowd vote, etc.
poll_2_answer	Text (255)	User-submitted answer to the poll. Up to 255 characters.
poll_2_question	Text (255)	Client-determined poll question asked to the audience. Up to 255 characters.
etc.	*etc.*	*etc.*

💡 Kaltura supports up to 10 polls per session (30 data points).