

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

 This article is designated for administrators.

## 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:

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

PII

HIPAA

GDPR

PCI

Chosen

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 [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

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 minuted vod content was consumed
live_minutes_viewed	Number(16, 2)	Amount of minuted live content was consumed
total_vod_completion_rate	Number(16, 2)	Vod content completion rate
no_live_engagement_rate	Number(16, 2)	Total time in which viewer was with sound mute ,
low_live_engagement_rate	Number(16, 2)	Percentage in which the user got low live quality v
fair_live_engagement_rate	Number(16, 2)	Percentage in which the user got fair live quality vi
good_live_engagement_rate	Number(16, 2)	Percentage in which the user got good live quality
high_live_engagement_rate	Number(16, 2)	Percentage in which the user got high live quality v
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 reactor
think_clicked_count	Number(18, 0)	Amount of times the user clicked on think reactor
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 reactor

[template("cat-subscribe")]