

Salesforce Integration

Integration Overview

The Webcast Salesforce Integration offers the capability to pass webcast data into Salesforce. The Webcast Activity Feed is an integration managed by the webcast team that allows you to create / update contacts, create / update leads, update campaigns, and capture interaction data in custom objects.

Webcast Activity Feed

Activity Feed Overview

The Webcasts Activity Feed sends webcast registration, attendance and interaction data into Salesforce. This document outlines the specific data that passes with the integration, as well as setup steps required to complete the integration. The Salesforce activity feed is facilitated by [Workato](#).

The webcast activity feed is setup and managed by the webcast team, please use the [form](#) to request the required support.

Included Data and Endpoints

Clients are able to customize which data and endpoints listed below are included with their implementation. This will be confirmed during the meeting with a webcast integration specialist.

- Create new Salesforce Contacts
 - Standard Webcast Registration Details
 - Custom Webcast Registration Details
- Update Existing Contacts
 - Standard Webcast Registration Details
 - Custom Webcast Registration Details

- Create new Salesforce Leads
 - Standard Webcast Registration Details
 - Custom Webcast Registration Details
- Update Existing Leads
 - Standard Webcast Registration Details
 - Custom Webcast Registration Details
- Webcast Interaction Data (Salesforce Custom Objects)
 - Standard Webcast Registration Details
 - Custom Webcast Registration Details
 - Webcast Viewing Session Times and Durations
 - Webcast Polling / Survey Responses
 - Webcast Q&A Data
 - Webcast CE Details
- Salesforce Campaigns
 - Add new campaign members
 - Update campaign member statuses

Requirements

- API enabled Salesforce Account

- Custom Data Objects to store webcast interaction data

Custom Objects

Object Name: Webcast Registration Viewer Data

Field Name	Required	Description	Field Type
External ID	Yes	Stores unique values which connect the data between the webcast and Salesforce	text, 255 characters (External ID) *screenshot below
Address1	No	Street Address 1	text, 255 characters
Address2	No	Street Address 2	text, 255 characters
Attended	No	Did the webcast registrant view, at least a portion, the webcast	checkbox (default value: unchecked)
Campaign Source	No	Track the marketing channel that drove webcast registration	text, 255 characters
Certificate Link	No	Link to download the user's certificate, if applicable	text, 255 characters

Certification Results	No	Did the user pass the requirements to receive CE credit	text, 255 characters
City	No	City	text, 255 characters
Company	No	Company	text, 255 characters
Contact	No	Connects the custom object record to the corresponding contact, if contact exists	Lookup Relationship (Contact)
Cost Center	No	Text field in the webcast setup, generally utilized to capture sponsor or billing code information	text, 255 characters
Country	No	Country	text, 255 characters

Custom Registration	No	Non-default webcast registration field. The actual field name implemented should not be "Custom Registration" but reflect the information captured	text, 255 characters
Email	No	Email	email
Fax Number	No	Fax Number	text, 255 characters
First Name	No	First Name	text, 255 characters
Hidden Field	No	A registration field that is hidden on the webcast registration form. Similar to the "Custom Registration" field a different field name can be chosen for this field.	text, 255 characters
IP Address	No	IP Address	text, 255 characters

Last Name	No	Last Name	text, 255 characters
Lead	No	Connects the custom object record to the corresponding lead, if lead exists	Lookup Relationship (Lead)
Live Session Duration	No	The amount of time the user viewed the webcast live	number (length: 18, decimal: 0)
Mobile Number	No	Mobile number	text, 255 characters
OD Session Duration	No	The amount of time the user viewed the webcast in their most recent on-demand session	number (length: 18, decimal: 0)
Phone Number	No	Phone Number	text, 255 characters
Postal Code	No	Postal or ZIP Code	text, 255 characters

Referrer	No	The address of the website the user accessed the webcast URL from, if included in the browser header.	text, 255 characters
Registration Date	No	Date of user registration for the webcast	date/time
Sim Live Duration	No	The amount of time the user viewed the webcast in their most recent simulated-live session	number (length: 18, decimal: 0)
State	No	State or Province	text, 255 characters
Title	No	Job Title	text, 255 characters
Unsubscribed	No	Unsubscribe to email communications for this specific webcast event ID. checked(unsuscribed from communications), unchecked(did not unsubscribe from communications)	checkbox (default value: unchecked)

User Agent	No	A characteristic string that lets servers and network peers identify the application, operating system, vendor, and/or version of the requesting user agent.	text, 255 characters
Webcast Event ID	No	Unique id of the corresponding webcast event	text, 255 characters
Webcast Event Title	No	Title of the corresponding webcast event	text, 255 characters

Field Label

ID

Please enter the maximum length for a text field below.

Length

255

Field Name

ID

Description

Help Text

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

Default Value

Show Formula Editor

Use formula syntax, e.g., Text in double quotes: "hello", Number: 25, Percent as decimal: 0.10, Date expression: Today() + 7

Object Name: Webcast Survey QA Data

Field Name	Required	Description	Field Type
External ID	Yes	Stores unique values which connect the data between the webcast and Salesforce	text, 255 characters (External ID) *screenshot above
Answer	No	Depending on "Record Type" it is either a viewer's response to a poll/survey or an admin's response to a viewer question	text area, long
Campaign Source	No	Track the marketing channel that drove webcast registration	text, 255 characters
Contact	No	Connects the custom object record to the corresponding contact, if contact exists	Lookup Relationship (Contact)
Email	No	Email	email
Lead	No	Connects the custom object record to the corresponding lead, if lead exists	Lookup Relationship (Lead)

Question	No	Depending on "Record Type" it is either a viewer question or the question for a poll/survey	text area, long
Record Type	No	QA: Is a viewer question In-Event: Is a survey/poll sent during the webcast Post-Event: Is a survey responded to after the conclusion of the webcast	text, 255 characters
Webcast Event ID	No	Unique id of the corresponding webcast event	text, 255 characters
Webcast Event Title	No	Title of the corresponding webcast event	text, 255 characters

If you need additional information on creating Custom Objects in Salesforce, please contact Salesforce Support.

Salesforce Campaigns

In order for the webcast registration and attendance data to update campaigns a "webcast_id" field needs to be added to Salesforce campaigns. Enter the corresponding 7 digit webcast id into this field.

Additionally, the integration's default status fields are:

- "Registered" - for any user who has a registration for the webcast but has not yet attended. Webcast can be pre-live.
- "Attended" - for any user who has attended the webcast, either as a live, on demand or simulated live participant.

Implementation Process

To facilitate the integration implementation you will need to schedule a meeting with an integration specialist to review the specific requirements for your integration, which were outlined in the completed [form](#). The integration process is handled almost entirely by the webcast team, there are a couple steps you will need to complete:

1. Create the two custom objects and add the "webcast_id" field to campaigns in Salesforce to store webcast activity data.
2. Connect Workato to Salesforce. It is recommended that the initial integration setup be completed using a sandbox environment, if available. The connection to Workato will be completed during your implementation call, but you can review the process by watching the [Workato Connection Setup Tutorial](#).

Revision #4

Created 23 October 2023 15:07:27 by Ian MacMillan

Updated 23 October 2023 20:15:38 by Ian MacMillan