

Guide to integrating
Bizzabo & Salesforce

Bizzabo and Salesforce are a powerful combination. Together, they are the best way to give your team a comprehensive look at your Attendees, Speakers and Sponsors.

As an event organizer, your business is your people. Each person you establish a relationship with lives within the Bizzabo Contacts tab. Bizzabo is the heart of your event and Salesforce is probably the heart of your sales team.

In this guide we will cover the most common use cases available and our recommendation to get the most out of this integration. We highly recommend consulting with your salesforce implementer and developers before you start.

Guide to integrating
Bizzabo & Salesforce

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Terminology

Bizzabo and Salesforce terminology is a bit different. It is important to understand the objects in Bizzabo before you decide on your mapping.

Bizzabo Contact - a person with a unique email. Contacts can be created in Bizzabo from different sources such as: Import, Manually created, filling out a form, attendee that didn't complete registration, adding speaker and more.
Ticket - Ticket is an object that holds the registration data such as Ticket type, price, tax, Bizzabo contact (reference), buyer name and more.
Event - your event data. This includes: start and end date, name, description, twitter hashtag, location, venue.

Benefits

The integration makes it possible to:

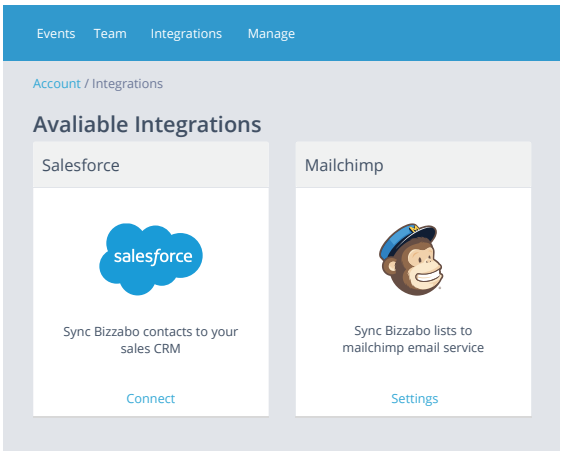
- Sync all event contacts and attendees to your Salesforce and track through the sales cycle.
- Sync events data to Salesforce on an ongoing basis.
- Define a different sync mapping for each of your events.
- Sync tickets data to Salesforce on an ongoing basis.
- Give you full control over which fields to sync in each object.
- Create conditional mapping by defining a primary object and a fallback secondary object. For example: Map your Bizzabo contacts as Salesforce Contacts object first. If a match is found the contact will be updated with the new information, if no match is found, map as your Lead object.
- Sync custom fields.
- Control the sync frequency.
- Sync contacts that do not have a Salesforce account by defining a default Salesforce account for mapping.

We want your integration to be a success. Please talk to your account manager if you have any question.

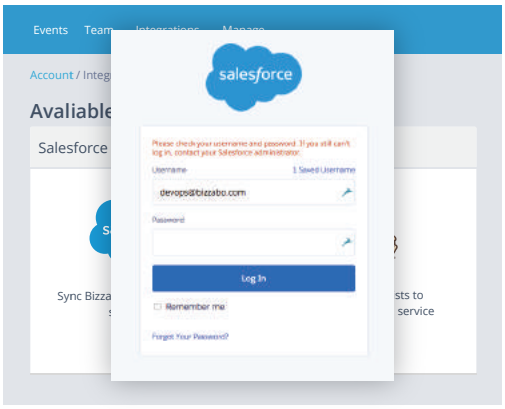
Getting Started

First we need you to connect your Salesforce to Bizzabo.

1. Go to your account at accounts.bizzabo.com
2. Go to the integrations tab
3. Select the Salesforce option and click on the Connect link



4. This will pop up a secure Salesforce window where you should enter valid credentials for your salesforce account. Notice that the user credentials you are using for logging in need to have the following permissions in your Salesforce account: "Customize Application" AND either "Modify All Data" OR "Manage Connected Apps".



5. After successfully integrating Salesforce you will be directed to your Account Salesforce integration page. There you will see all of your event's status and integration data.

Your account is now connected!
All you need to do now is define the field mapping for your events.

Understanding Limitations of The Sync

The sync functionality between Bizzabo and Salesforce is very powerful. However, there are still a few limitations to this feature that you should understand before you decide if the sync is right for you.

- The integration matches Bizzabo Contacts to Salesforce Object one-for-one based on email address, and expects each Salesforce Contact/Lead to have a unique email address. So if you have multiple Contacts/Leads that share the same email address, we only update the first object returned by Salesforce.
- The integration matches the Tickets ID and Events ID one-for-one based on the unique ID. During the sync, if an object has a reference to another object in Salesforce, and the refer-
- enced object does not exist, the object will not be inserted/updated.
  - Except for when a contact's company/account isn't found on Salesforce. In these cases there is an option to define a default Salesforce account.

Again, this is an advanced feature so you might want to contact your Bizzabo account manager to get help with the implementation.

General Mapping Concept

Each sales team operates a little differently, and we, as part of Bizzabo's integration with Salesforce, wanted to give you the flexibility to have the integration fit seamlessly into your sales process.

The Salesforce mapping is defined at the event level. For each event, you can control which objects and fields will be synced and how often. You can also easily clone existing mapping from past events.

For example: You are organizing 2 big conferences a year (one for existing customers and one marketing conference for sourcing leads) and 4 meetups. You can define different mapping for each conference (Bizzabo Contact to Contact for the customers conferences and Bizzabo Contacts to Leads for the marketing conference).

We have 3 Objects inside Bizzabo that can be selected to sync to your salesforce:
Bizzabo Contacts, Ticket & Event.

Bizzabo Contact

This is the basic object in Bizzabo. It represent one person. The Bizzabo Contact is identified by a unique email. The Bizzabo Contact holds different properties such as First Name, Last Name, Job Title and more. It is best to map the Bizzabo Contact to your Salesforce Contact or Lead objects.

Ticket

The Ticket object in bizzabo holds all the registration information such as Ticket Type, Buyer Name, Promo code, Net income and more. It is identified by the unique Ticket ID.
The Ticket object also holds the following:

- Contact email so you can reference it to the Contact/Lead object.
- Event ID so you can reference it to the Event object.

Event

The Event object in Bizzabo holds all the basic event information such as Event Name, Description, Start Date, End Date and more-it is identified by the unique Event ID.

Relation Event-Attendee

The Relation Event-Attendee object is a many-to-many object that you can use in order to create many-to-many relations between the 3 bizzabo objects (see below for more information).

Best Practices and Recommended Fields Mapping.

We will describe the 3 options for defining the mapping. The best solution for you depends on your existing Salesforce schema and it is highly recommended that you consult with your salesforce admin/implementor before you select the option you're going to use.

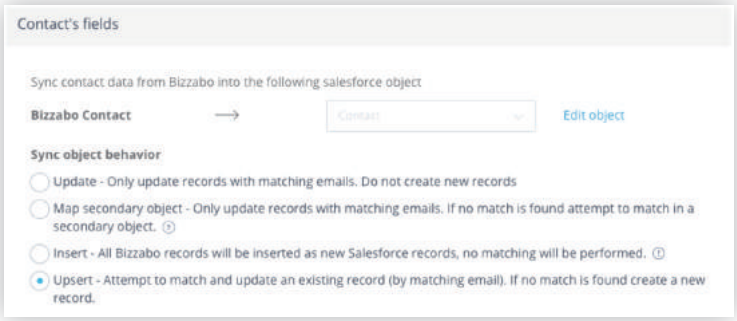
Mapping option 1 - The simple one

The concept here is to put all the Ticket information and the Contact data on 2 Salesforce objects.

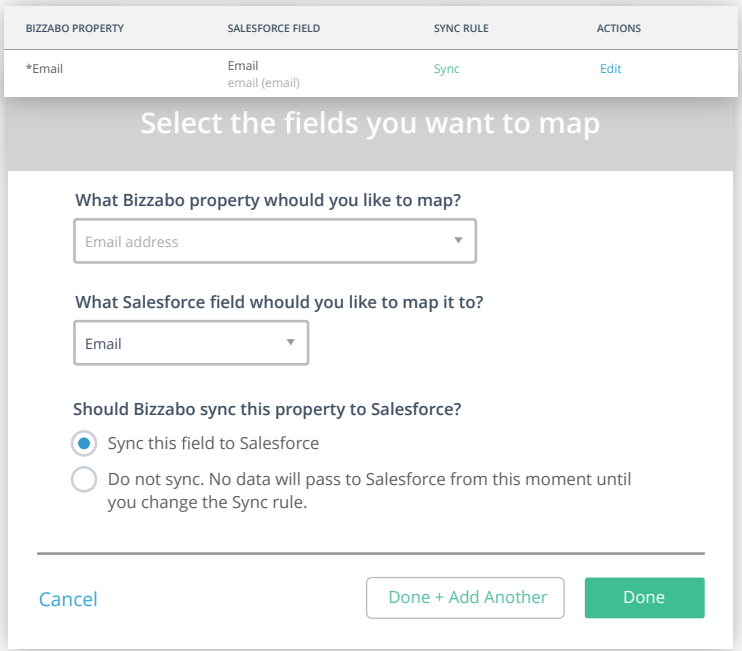


The Bizzabo Contact object should be defined as following:

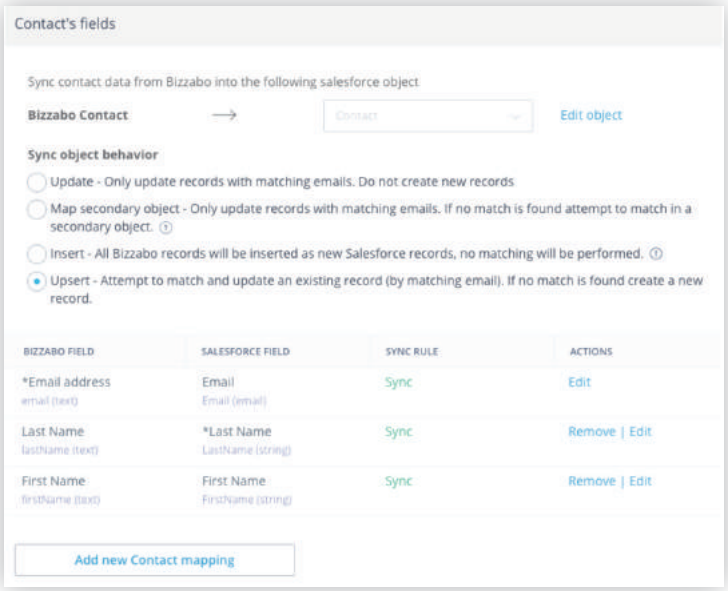
1. Select Contact or Lead as the object to map to. Set sync behavior as desired (Upsert is recommended to keep your data up-to-date)



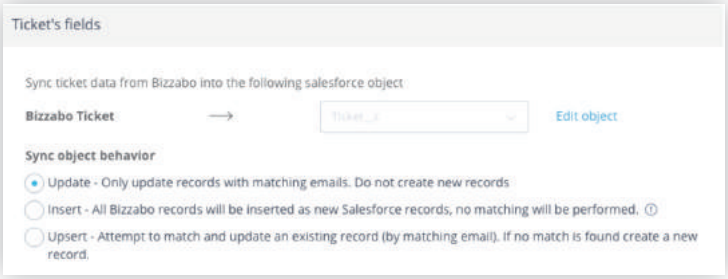
2. Start by mapping the email field to the email in your Salesforce by clicking on Edit.



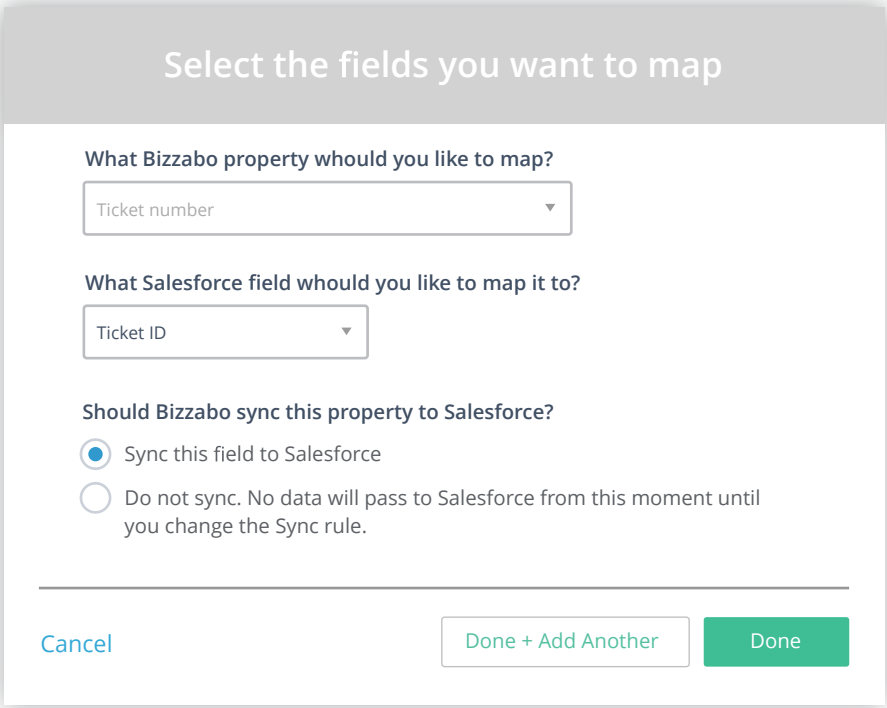
3. Add new fields you wish to sync by clicking on the "Add new contact mapping" button:



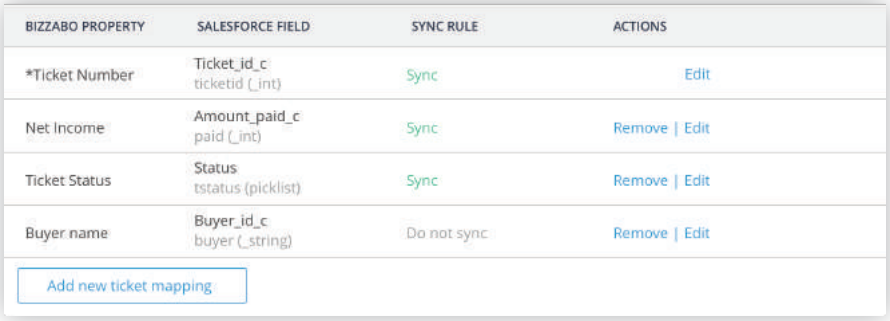
Now let's map the Ticket object. Select the desired object in salesforce (Custom Ticket object is recommended). Select sync behavior as desired (Upsert is recommended)



1. Start by mapping the ticket number field to the to the Ticket ID in your Salesforce by clicking on Edit.

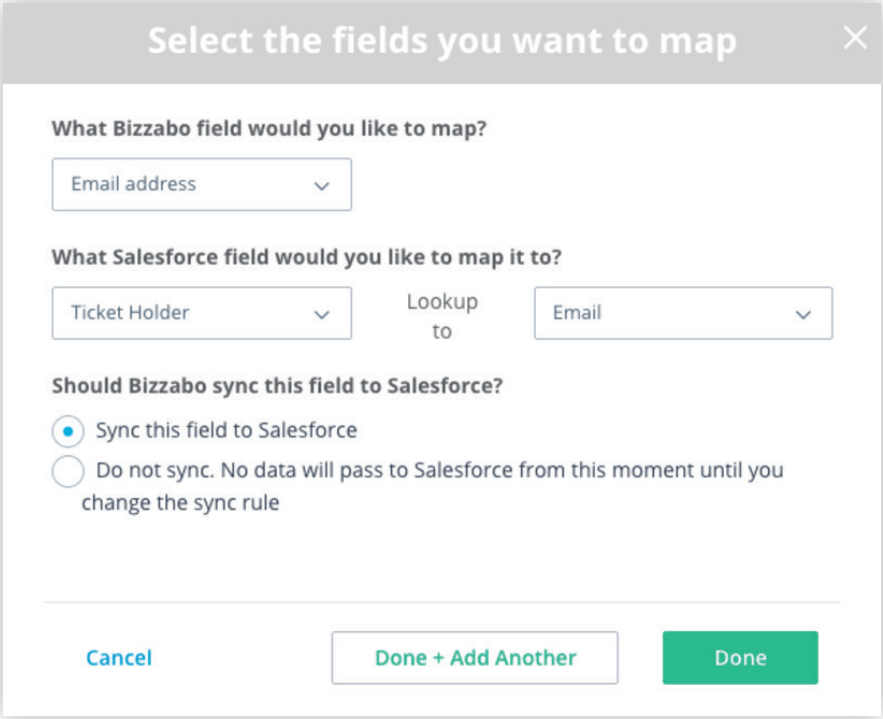


2. Add new fields you wish to sync by clicking on "Add new ticket mapping" button:



3. Now we want to relate the ticket object to the contact object record through a lookup field that we will select:

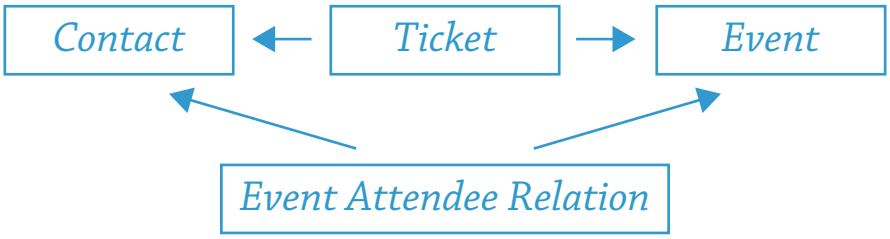
a. Click on "Add new ticket mapping".
b. Select the email field.
c. In your Salesforce, create a relation field (for example "Ticket holder") to the Contact/Lead under the Ticket object.
d. Select the relation field. This will open a second picklist with the fields on the object we are looking up to through the relation, Ticket Holder.
e. Find the email and select it.
f. Hit Done and Save.



We are doing this so that our ticket will be related to the contact. We mapped the Bizzabo ticket to Ticket__c and the Bizzabo Contact to Contact. We then chose a lookup field from Ticket_c to Contact.

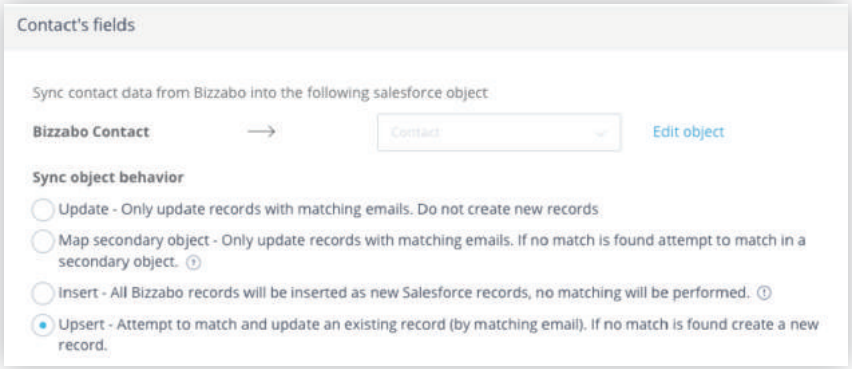
Mapping option 2 - The multi - event option

The concept here is to create 3 Salesforce objects (Contact/Ticket/Event) and one reference object that will allow many-to-many relations between contacts to events

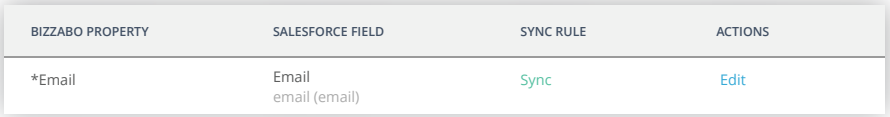


The Bizzabo Contact object should be defined as the following:

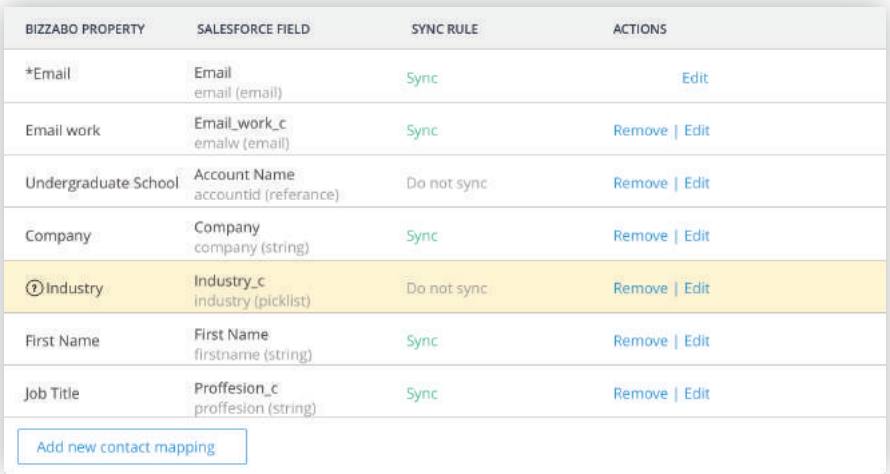
1. Select Contact or Lead as the object to map to. Sync behavior as desired (Upsert is recommended)



2. Start by mapping the email field to the email in your Salesforce by clicking on Edit.

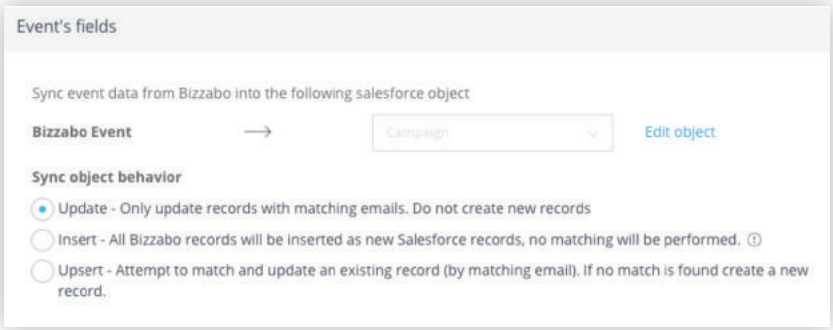


3. Add new fields you wish to sync by clicking on the "Add new contact mapping" button:



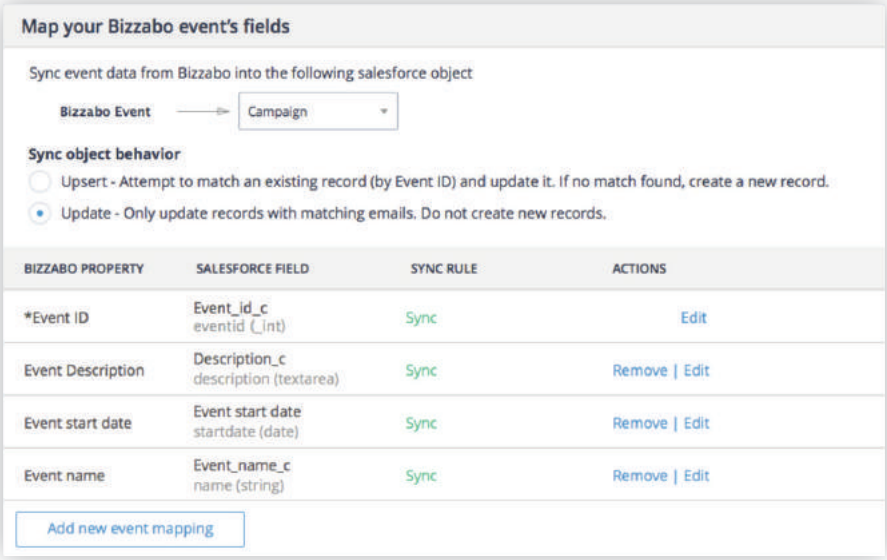
The next object we need to map is the event

1. Select the desired object in Salesforce (you can use a custom object or the Campaign object). Set sync behavior as desired (Upsert is recommended)

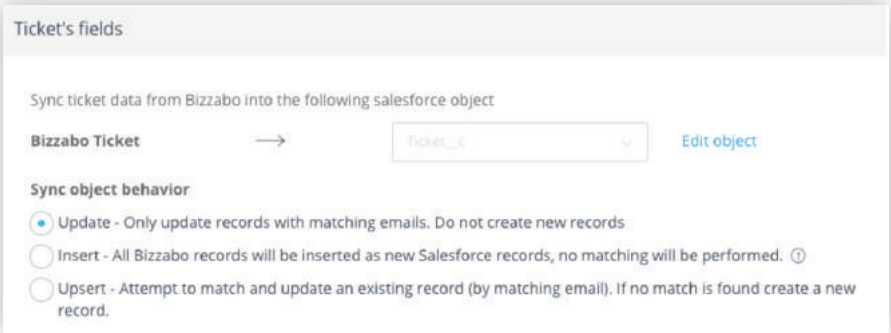


2. Start by mapping the event ID field to the to the Event ID in your Salesforce by clicking on Edit.

3. Add new fields you wish to sync by clicking on the "Add new event mapping" button:



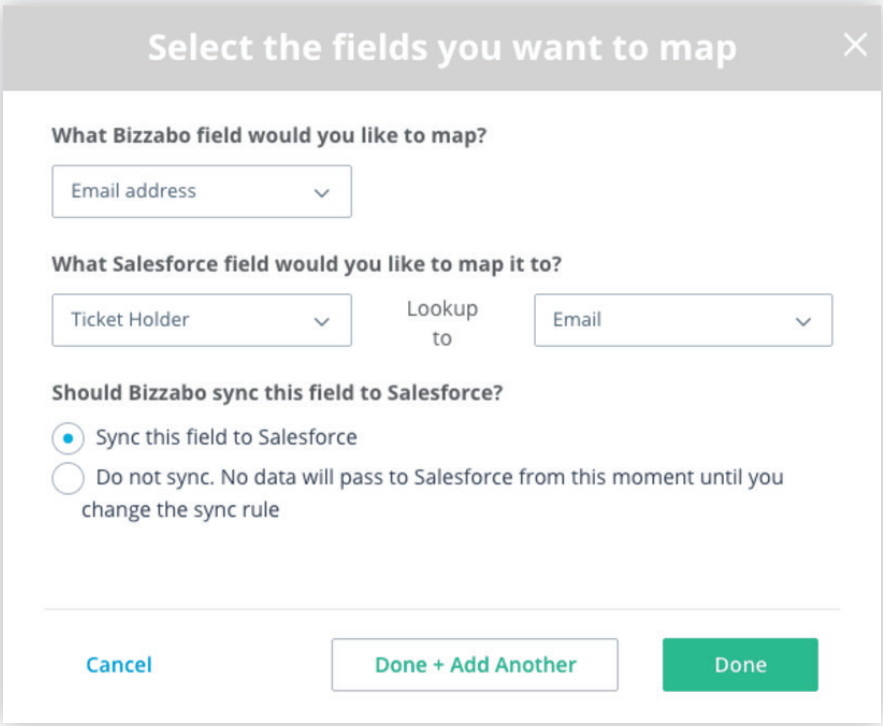
Now let's map the Tickets object. Select the desired object in Salesforce (Custom Ticket object is recommended). Set sync behavior as desired (Upsert is recommended)



1. Start by mapping the ticket number field to the Ticket ID in your Salesforce by clicking on Edit.

2. Now we want to relate the ticket object to the contact object record through a lookup field that we will select:

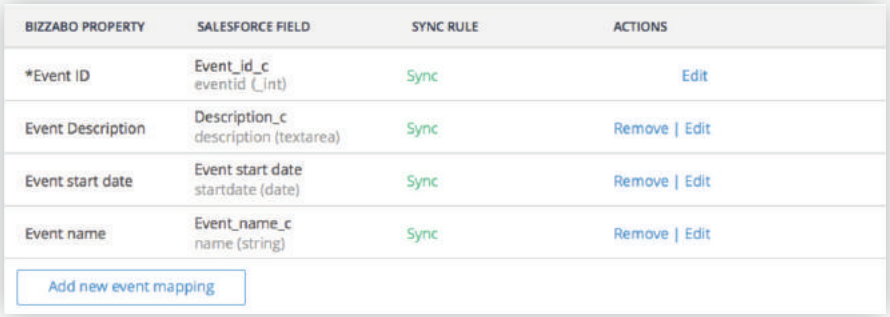
a. Click on "Add new ticket mapping".
b. Select the email field
c. In your Salesforce, create a relation field (for example "Ticket holder") to the Contact/Lead under the Ticket object.
d. Select the relation field. This will open a second picklist with the fields on the object we are looking up through the relation, Ticket Holder.
e. Find the email and select it.
f. Hit Done and Save.



3. Now we want to relate the ticket object to the event object through a lookup field that we will select:

a. Click on "Add new ticket mapping".
b. Select the Event ID field.
c. Int your Salesforce, create a relation field (for example "Event_ID_r") to the Event Object (or campaign in our example) under the Ticket object.
d.Select the relation field. This will open a second picklist with the fields on the object we are looking up through the relation, Event.
e. Find the Event ID and select it.
f. Hit Done and Save.

4. Add new fields you wish to sync by clicking on the "Add new ticket mapping" button:



The last object we want to map is the event-attendee object. This object represents the junction object between an Event and an Attendee. This means that we can have multiple Attendees on a given event with multiple tickets, and who can also be on other Events, a many-to-many relationship.

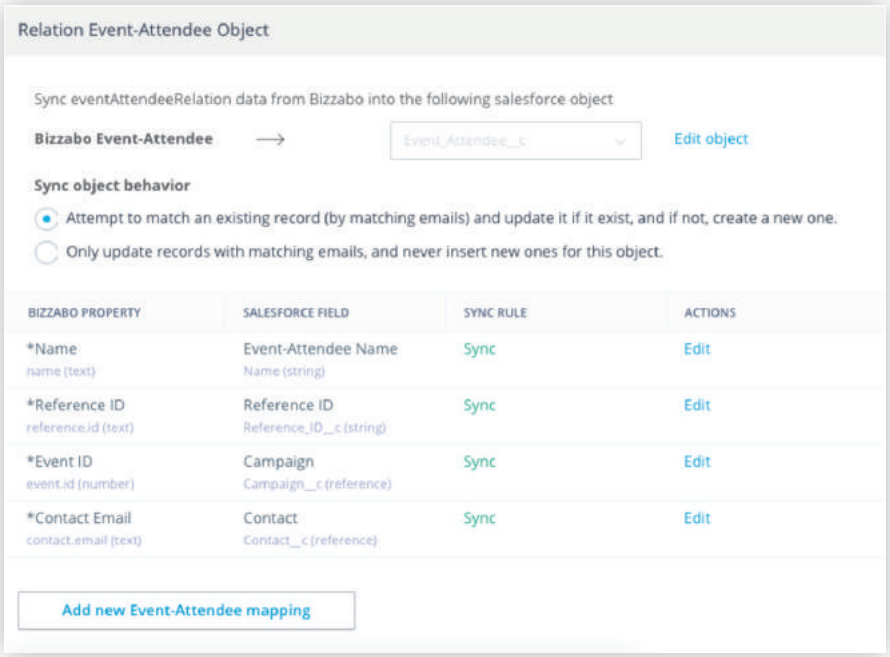
You will need to create a custom object in Salesforce (in our example we named it Event-Attendee_c). This object should hold an external ID field (in our example we named it Reference ID) and 2 reference fields:

a. To the Contact/Lead
b. To the Event(campaign) object

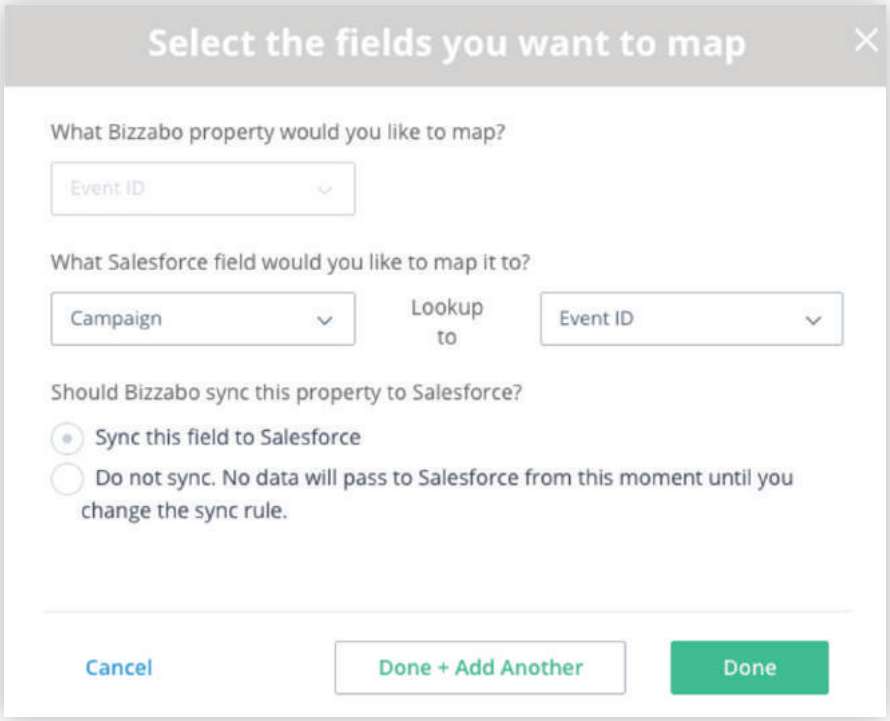
The ID field should be from type Text with a length of at least 100 and you need to mark it and make sure the option of "Set this field as the unique record identifier from an external system" is selected.

Follow the images mapping below.

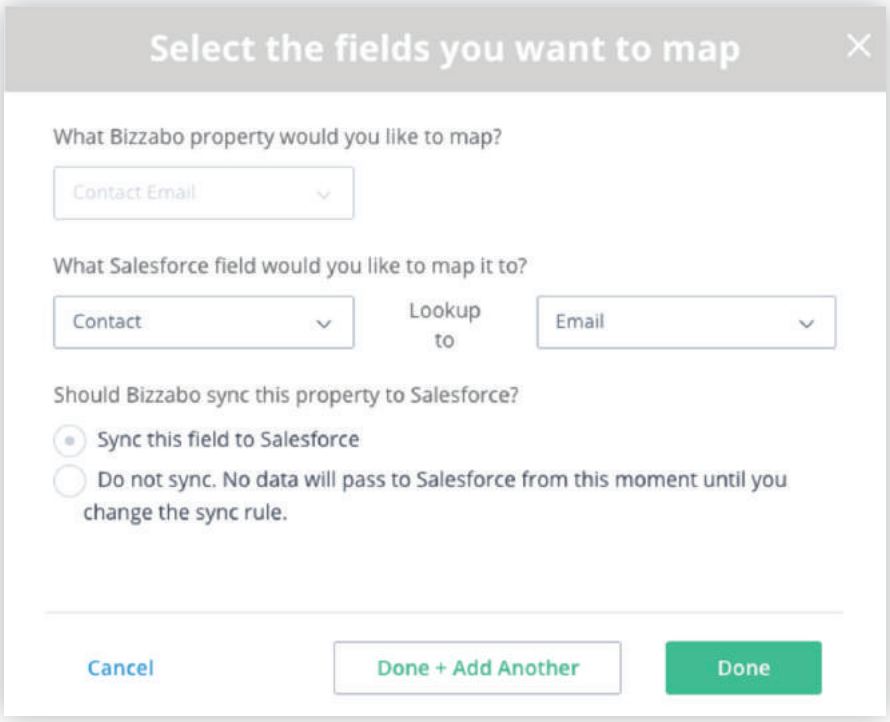
End result:



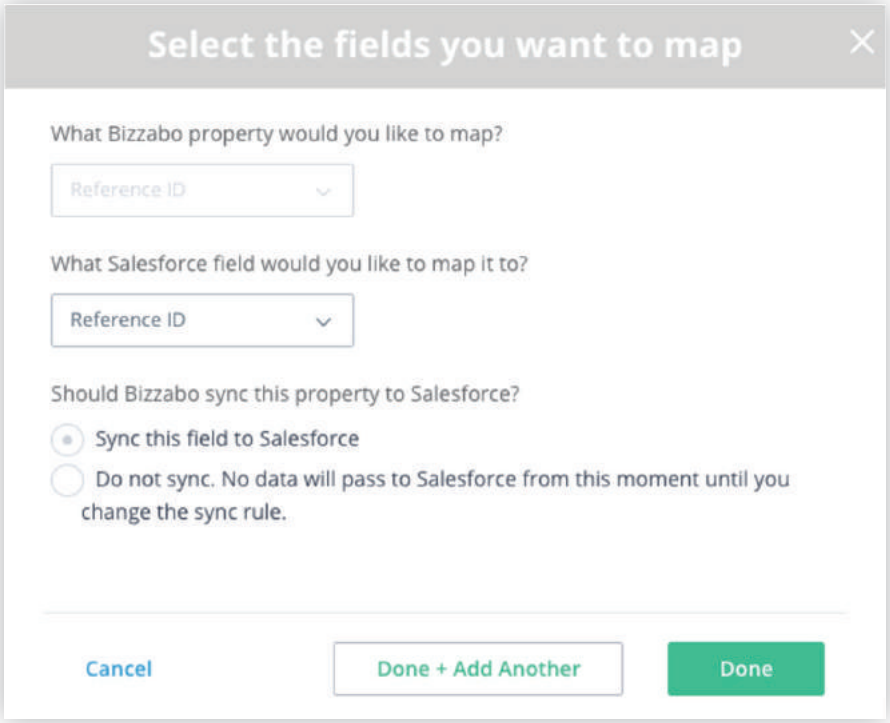
Event ID mapping:



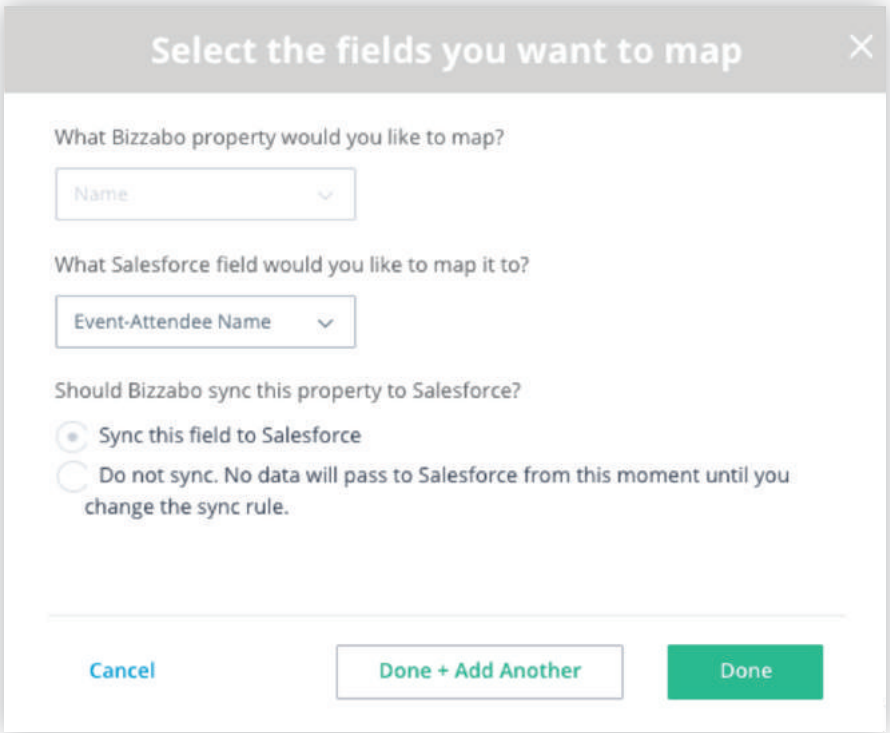
Contact Mapping:



Reference ID mapping



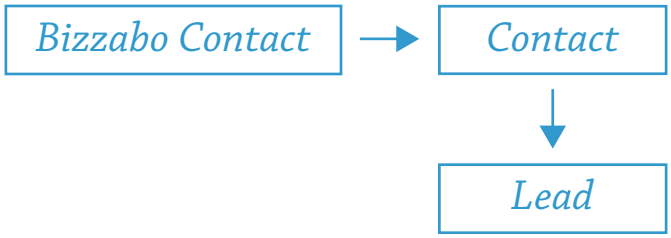
Name Mapping



Mapping option 3 - Contact to Lead Conditional Mapping

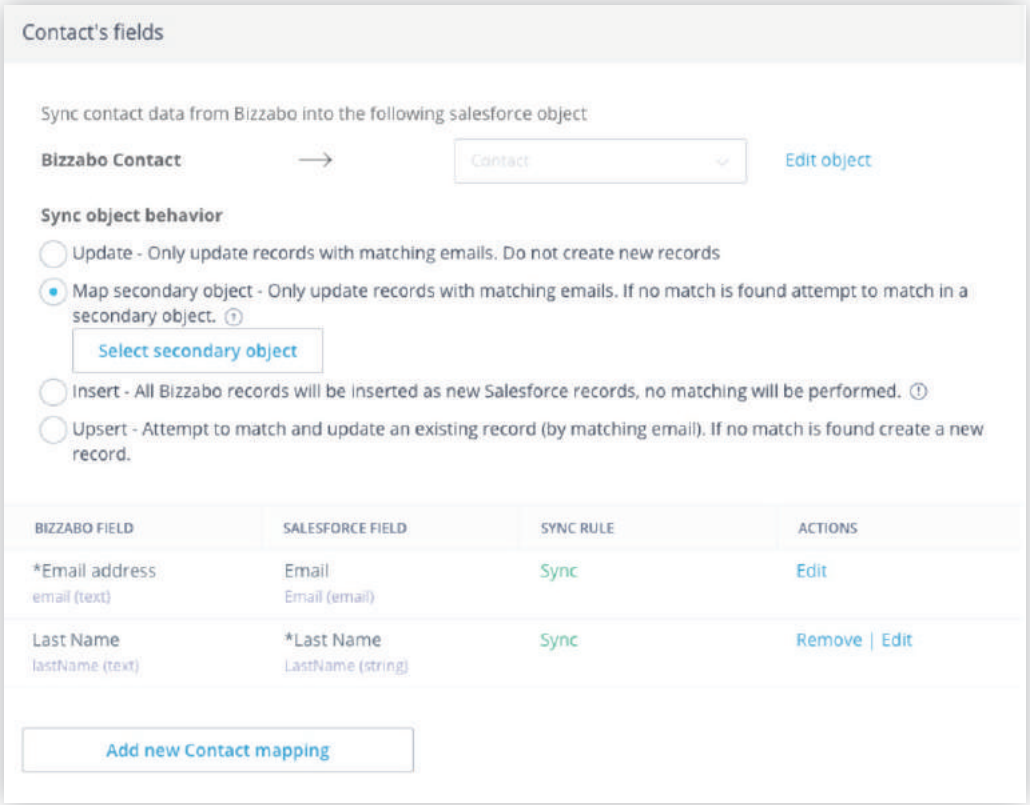
The concept here is to create a conditional mapping rule for your Bizzabo contacts. You are able to define a primary Salesforce object for mapping as well as a fallback secondary object.

Below an example for setting up conditional mapping of your contacts and leads by defining the mapping to first update Salesforce contacts if the contact is matched and if contact wasn't found, to map to the leads object.

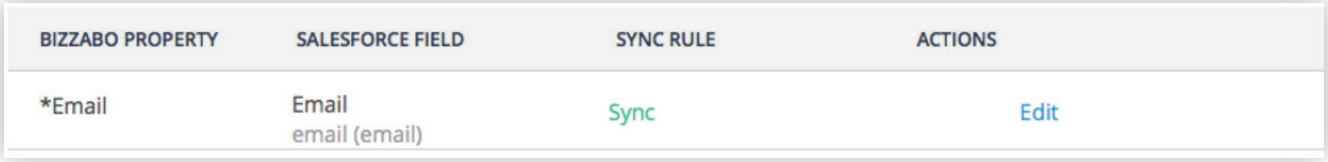


The Bizzabo Contact mapping should be defined as follows:

1. Select your Contacts object as your primary object. Set sync behavior as "Map secondary object."



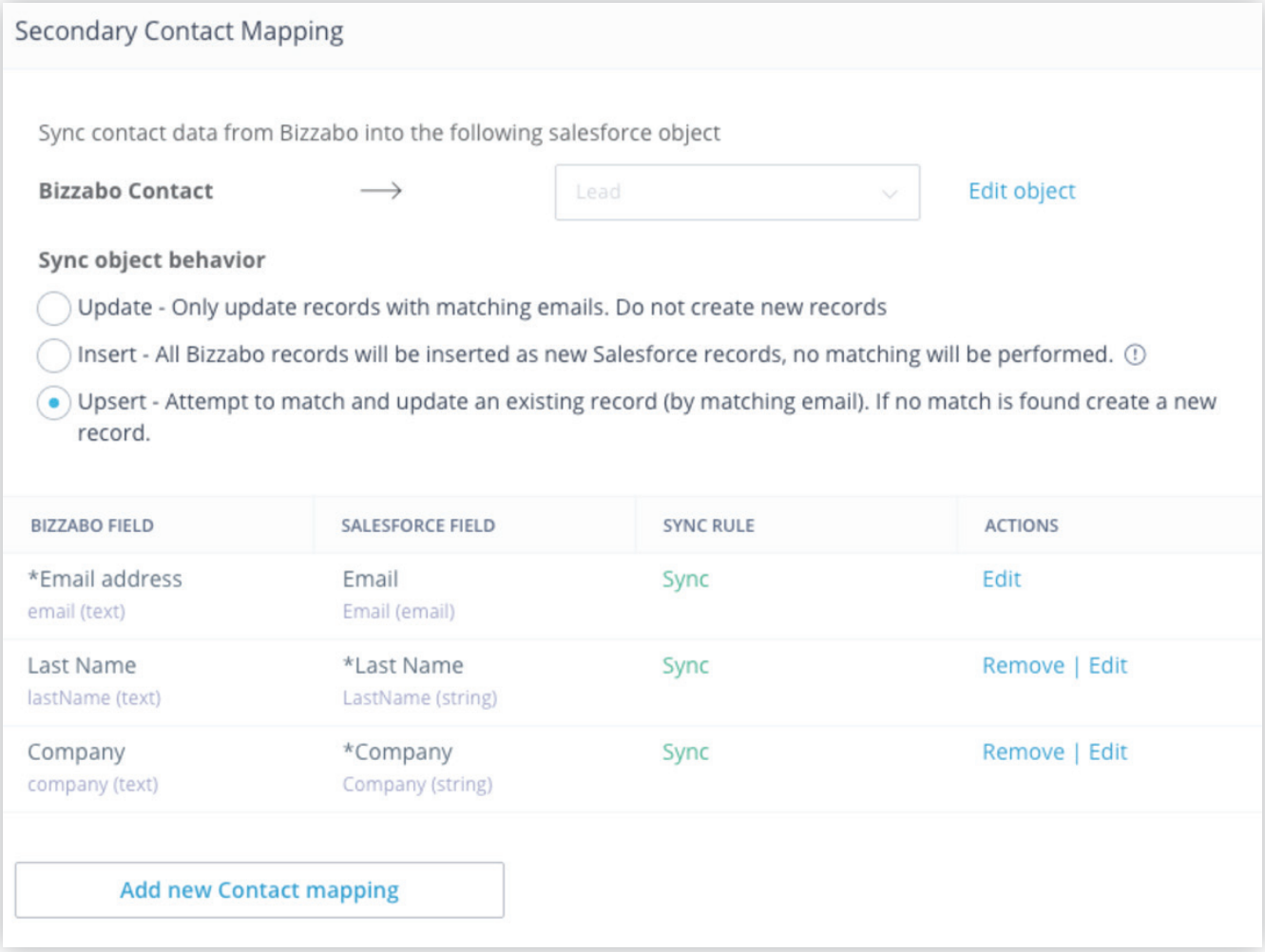
2. Start by mapping the email field in Bizzabo to the email in Salesforce. To do this, click on Edit.



BIZZABO PROPERTY	SALESFORCE FIELD	SYNC RULE	ACTIONS
*Email	Email email (email)	Sync	Edit

3. Add new primary object fields you wish to sync by clicking on the "Add new contact mapping" button.

4. Select the secondary object (your Lead object) by clicking on the "Select secondary object" button and choosing your desired object from the options available.

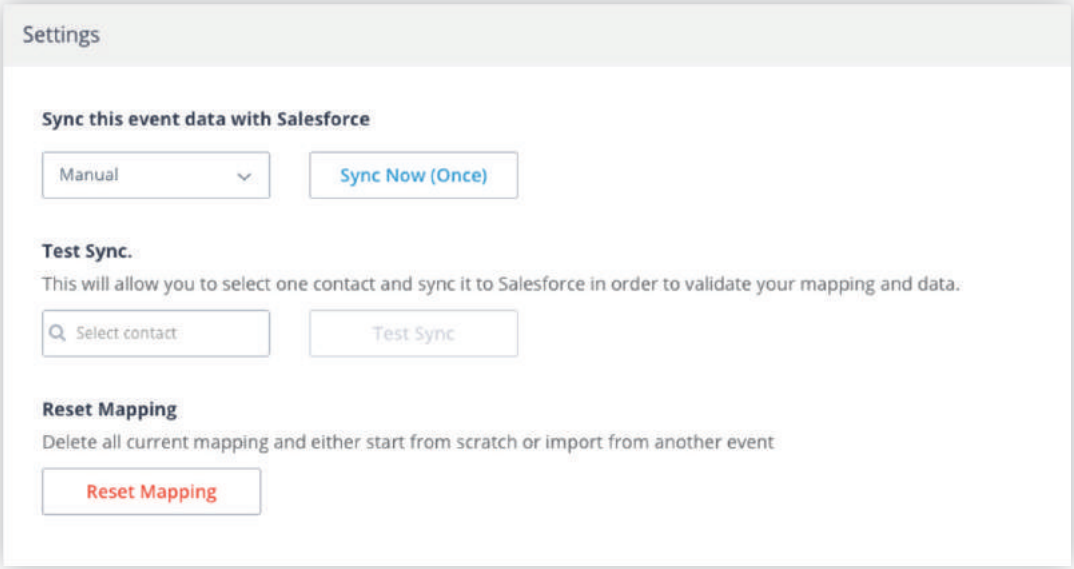


4. Add new secondary object fields by clicking on the "Add new contact mapping" button.

5. Select the Lead object and the Sync behavior needed. Examples of Synch behavior include: Update, Insert and Upsert.

Testing

Once you've finished setting up the mapping, you can test the integration by selecting a contact and clicking on the Test Sync at the bottom of the mapping page.



We will sync the Event Object, the selected contact and their respected tickets according to the mapping you defined.

Contact your customer success manager
or support@bizzabo.com
for any additional questions