

CRM Meta Data Fields

From the Organization / Settings page, each organization can set specific CRM Metadata Fields that they want included in all of their events.

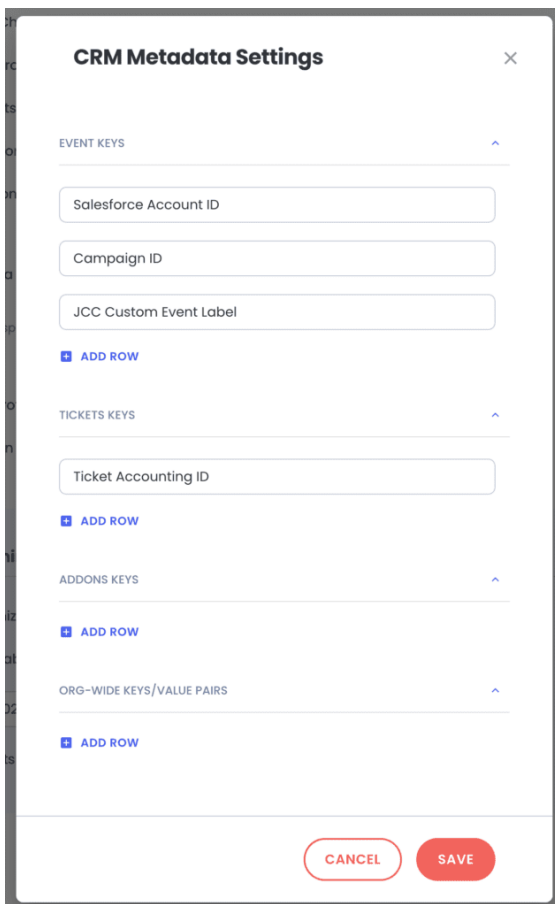
CRM Settings

Enable CRM Meta Data on Events

CRM Metadata

Edit Org-wide and Event specific key/value pairs.

MANAGE



The screenshot shows a modal dialog titled "CRM Metadata Settings" with a close button (X) in the top right corner. The dialog is organized into four sections, each with a header and an expand/collapse arrow:

- EVENT KEYS**: Contains three text input fields with the following values: "Salesforce Account ID", "Campaign ID", and "JCC Custom Event Label". Below these fields is a blue "ADD ROW" button.
- TICKETS KEYS**: Contains one text input field with the value "Ticket Accounting ID". Below this field is a blue "ADD ROW" button.
- ADDONS KEYS**: Contains one blue "ADD ROW" button.
- ORG-WIDE KEYS/VALUE PAIRS**: Contains one blue "ADD ROW" button.

At the bottom of the dialog, there are two red buttons: "CANCEL" and "SAVE".

Then, when creating an event, on the **Create Event / Settings Step**, the host can add values to those Metadata fields and they will be pushed to your CRM that is integrated.

Ex: Some organizations have an Internal Event Name that is different from the Public Event Name. Jlive only stores Public Event Name so this feature would allow you to pass the Internal Event Name

Below is an example showing how an organization that uses BBCRM has configured their custom CRM Metadata Fields.

CRM Metadata



Add custom fields for import to CRM



[Learn More](#)

Key	Value
BBCRM Event Name	<input type="text"/>
BBCRM Appeal	<input type="text"/>
BBCRM Designation	<input type="text"/>
BBCRM Do Not Add Custom Questions	<input type="text"/>
BBCRM Category	<input type="text"/>
BBCRM Event Lookup ID	<input type="text"/>
CRM Organization ID	<input type="text"/>
CRM Organization Name	<input type="text"/>
JCC- Winter Cocktail	Value
BBCRM Ticket Name	<input type="text"/>
BBCRM Registration Type	<input type="text"/>