Salesforce Integration

Last Modified on 09/15/2023 11:37 am PDT

The GiveSmart Fundraise Salesforce integration is a daily automated API sync, which syncs newly settled transactions to your Salesforce instance as Opportunities.

Once the field mappings are established and the sync activated, the integration is intended to run in the background with minimal intervention needed. In general, the integration will create new Opportunities for GiveSmart Fundraise transactions, and will match to existing Contacts by email, or create new Contacts if there is no email match.

Getting Started

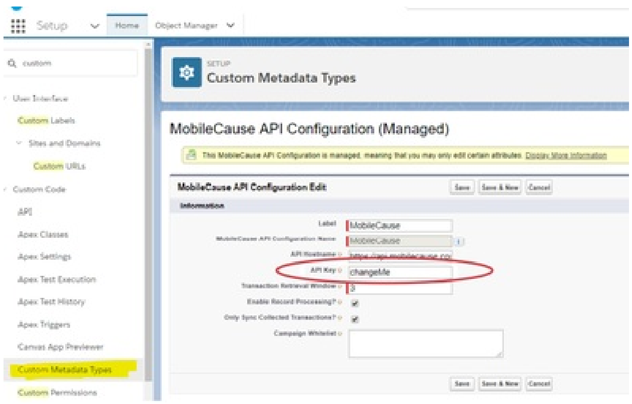
If you have the Salesforce CRM Integration included in your plan, reach out to your GiveSmart Customer Success Manager, who will notify the integrations team to reach out with next steps to the point of contact you specify. Otherwise, contact your Customer Success Manager for more information on how to add Salesforce integration support to your GiveSmart plan.

Retrieving your API Key

If you are an Admin user in GiveSmart Fundraise, you can retrieve your **Private API key**.

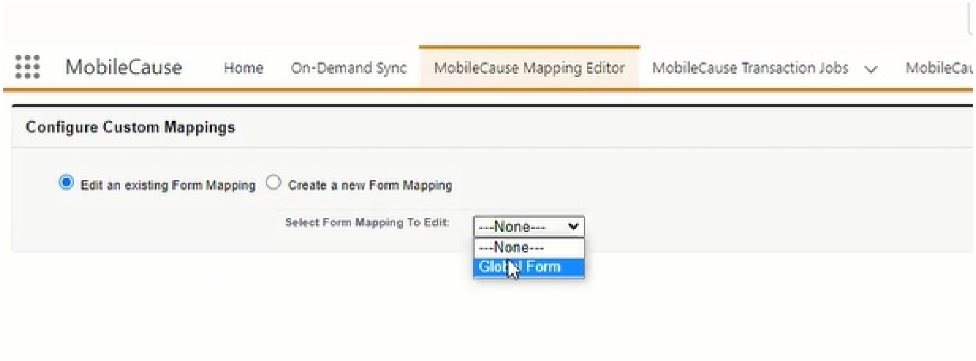
> **Note**: Only users with Admin privileges will be able to access the API information in GiveSmart Fundraise.

Once the integration app is installed in Salesforce, you can update the API key from **Setup > Custom Metadata Types > MobileCause API Config > Manage Records**.

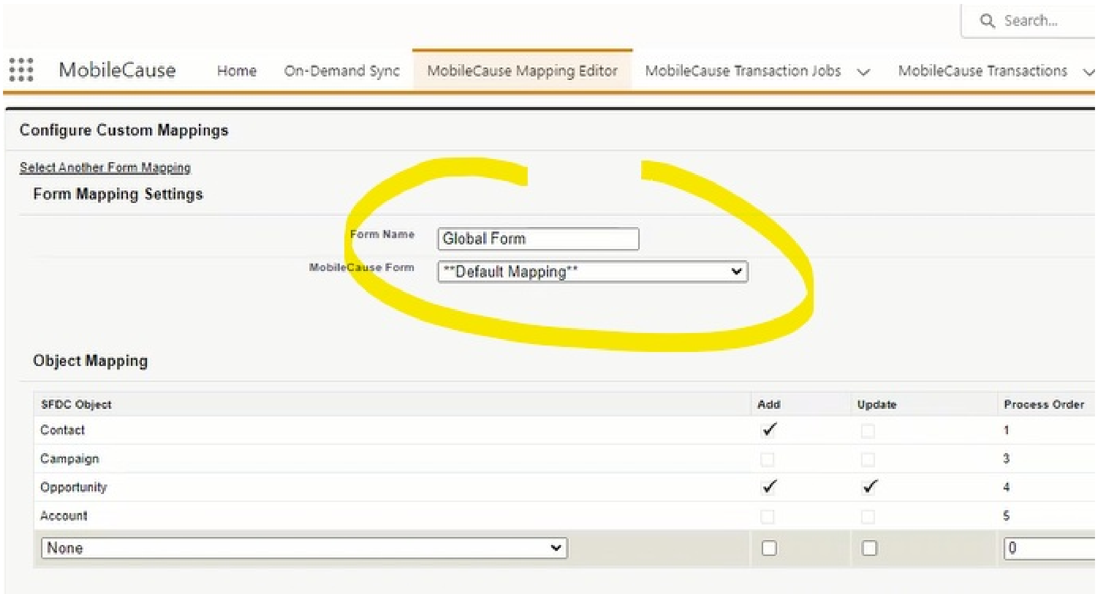


Mapping Editor

The Global Form is the only supported mapping template and the only template you will need to configure for the integration, as it will be applied to all transactions synced from GiveSmart Fundraise.



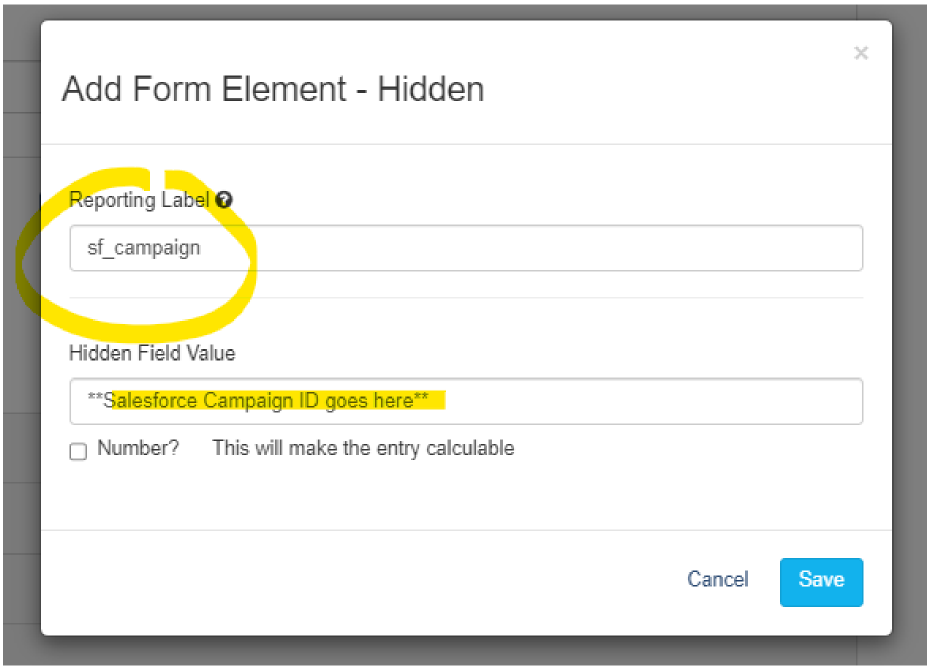
The Global Form should always remain as the default mapping, as you can add any new field mappings to this template without the need for additional templates.



Note: The Default Mapping cannot be renamed or deleted. Though the integration app allows you to create custom mapping templates to link to other forms, we do not recommend this as it becomes cumbersome to manage and troubleshoot multiple templates should any issues arise with the sync. The best practice is to always use the Global Form mapping, as custom templates are not supported.

Mapping to the SFDC Campaign

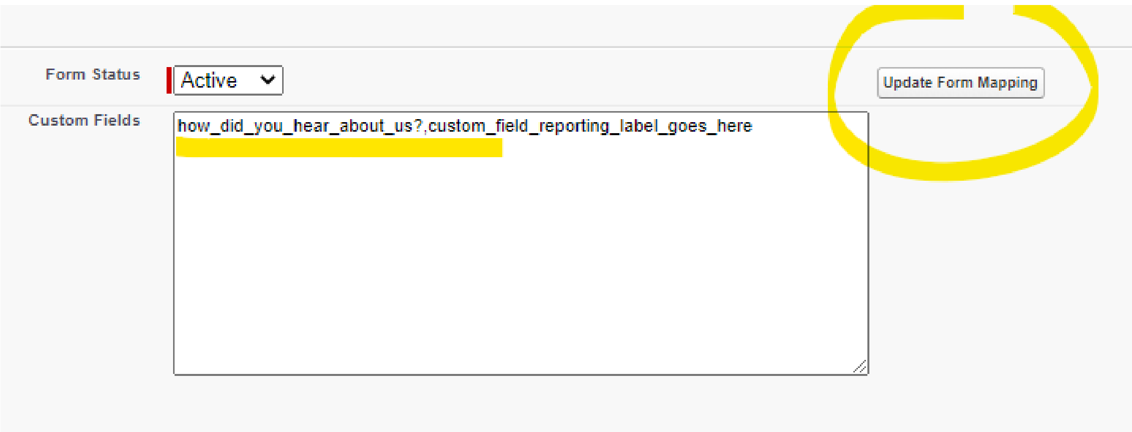
To map the SFDC Primary Campaign Source to any GiveSmart Fundraise form, first, create a **hidden form** element titled "**sf_campaign**" on the form. The Hidden Field's Value should be the Salesforce Campaign ID, exactly as it appears in Salesforce.



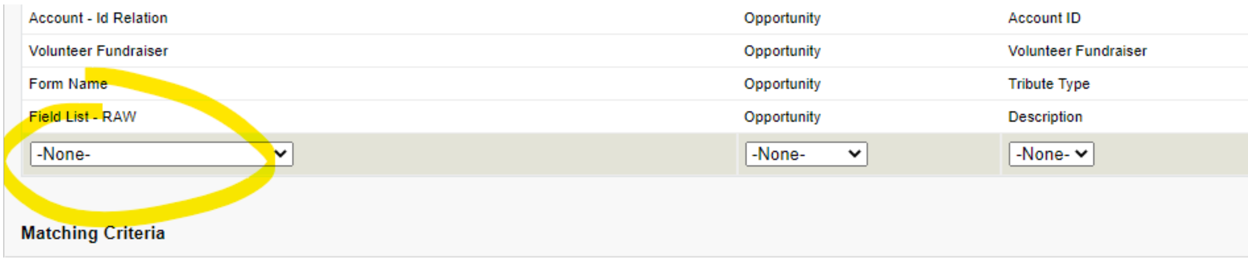
Note: You may also follow these steps to map the SFDC Record Type if needed, using "sf_record_type" as the hidden field label, and the record type ID instead.

Mapping Custom Fields from GiveSmart Fundraise

To map a GiveSmart Fundraise custom field to an SFDC field on the Opportunity, first, ensure that the field exists on at least one GiveSmart Fundraise form. Next, enter the reporting label of the field in the Custom Fields box when editing your Global template. Additional fields can be separated by a comma. Use lower-casing and underscores in place of spaces. Example below:

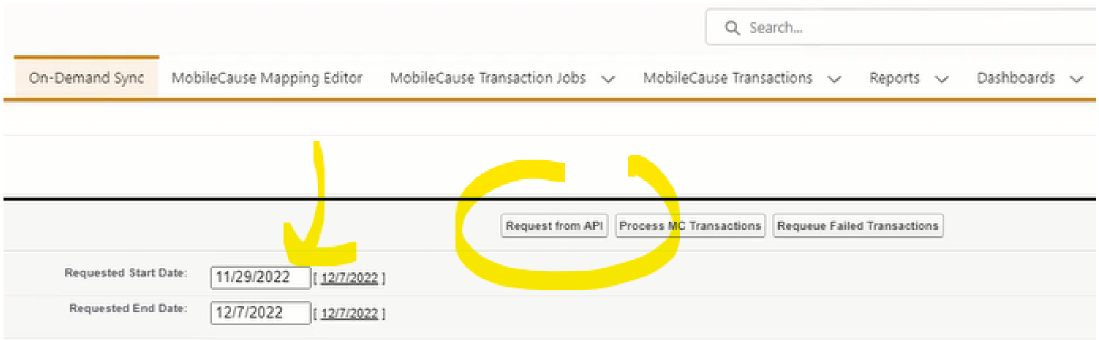


Next, select Update Form Mapping on the right-hand side. This will make the custom field available to select in the Source Field drop down when adding a new field mapping.



On-Demand Sync

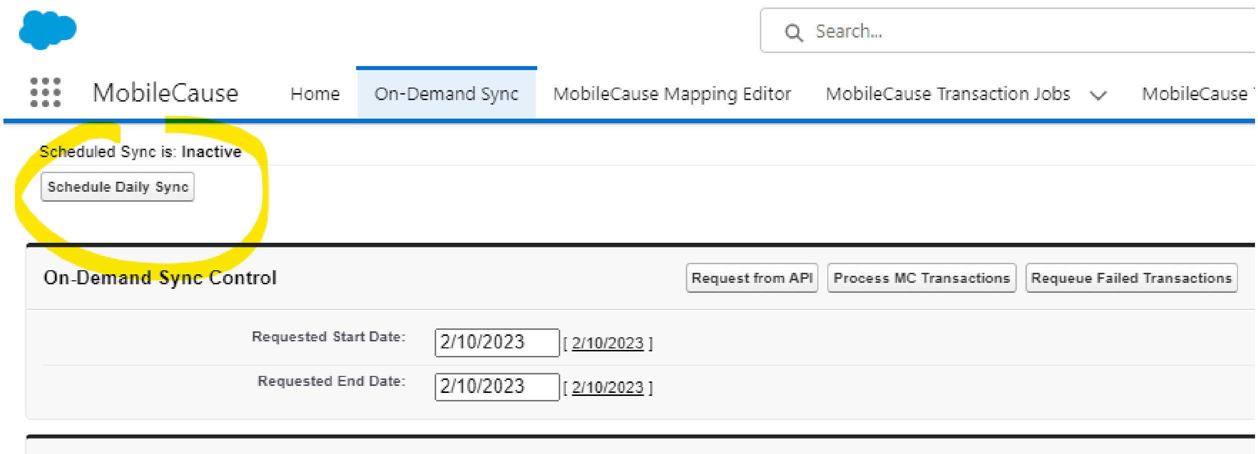
To sync historical donations, or to sync a new transaction for testing purposes, the "Request from API" option in the On-Demand Sync tab can be used to execute a manual sync. Most transaction sync jobs take about a minute to complete.



Note: The Request from API option will initiate a new sync job to pick up any settled monetary transactions within the date range you specify. Just be sure to only click this button once (e.g., not a double-click).

Activating the Sync

Select Schedule Daily Sync from the On-Demand Sync tab.



Note: The daily sync will run as the Salesforce user that schedules it, so just make sure this is activated by a user that you do not anticipate deactivating.

FAQs

What type of information is included in the sync?

- Only monetary transactions made through GiveSmart Fundraise are synced, e.g., payments made through a GiveSmart Fundraise payment form via credit card, PayPal, or Google Pay.

Will non-payment data sync?

- No - Information that is not associated with a monetary transaction is not eligible to be synced. This means that volunteer signups, free registrations/RSVPs, offline donations, etc. will not be synced.

Will recurring donations be included in the sync?

- Yes – recurring donations and subsequent installments will always sync to Salesforce as individual opportunities. However, it is not possible to sync these to Salesforce's recurring donations object/scheduler. You can view and manage your GiveSmart Fundraise recurring donations by heading to Existing Reporting > Recurring Donations at any time.

How does the integration handle Contact matching?

- The contact matching is done solely by email address and will look at all 4 default email fields in Salesforce one by one: email, personal email, alternate email, work email. If no email match is found, a new Contact will be created. You are not able to define "and/or" logic or use fuzzy matching within the app at this time.

Will any data get overwritten?

- In the Global Form Mapping template, if the "exclude on matching" box is checked next to any field mapping, this means that the integration will *not* update/overwrite this field when a contact match is found. This is recommended and checked by default for key contact fields such as First and Last Name.

How do I deactivate the sync?

- If the sync needs to be paused for any reason, you can turn off the scheduled sync in Salesforce by heading to Settings > Setup > Search: scheduled jobs and delete the MobileCause integration job. You can then restart the job after inside the connector app under On-Demand Sync tab as needed.

Does the GiveSmart/MobileCause integration user need to remain active in Salesforce?

- So long as the daily sync was not activated by this user, it can be deactivated without interruption to the sync. If you need support with troubleshooting or adding field mappings in the future, we will kindly ask for the admin user to be reactivated.

What Salesforce objects does the integration map to?

- The integration maps to the SDFC Opportunity and Contact objects. We can map to any fields on these two objects. If you are utilizing Salesforce's NPSP (Nonprofit Success Pack), new account and payment objects will get created for new opportunities depending on your NPSP settings.

Why are my transactions not syncing?

- Once activated, the integration will only attempt to sync any new transactions that have reached a Billing Status of "settled" within the last 3 days. Since settlement is dependent on the card-issuing bank, transactions can often take 1-3 days to sync once they are first captured through your form.

- If you notice that a transaction has not synced after 3+ days or reflects a "Failed" status within the On-Demand Sync tab of the Salesforce connector app, please **submit a new support request**.

Where can I find a report of all synced transactions?

- In the Salesforce app head to the tab titled "MobileCause Transactions." Here you can sort by "All" to return all transactions retrieved from GiveSmart Fundraise with their Sync Status, Date, Name, Opportunity, and other details.