

Charity Commission Search Installation Guide

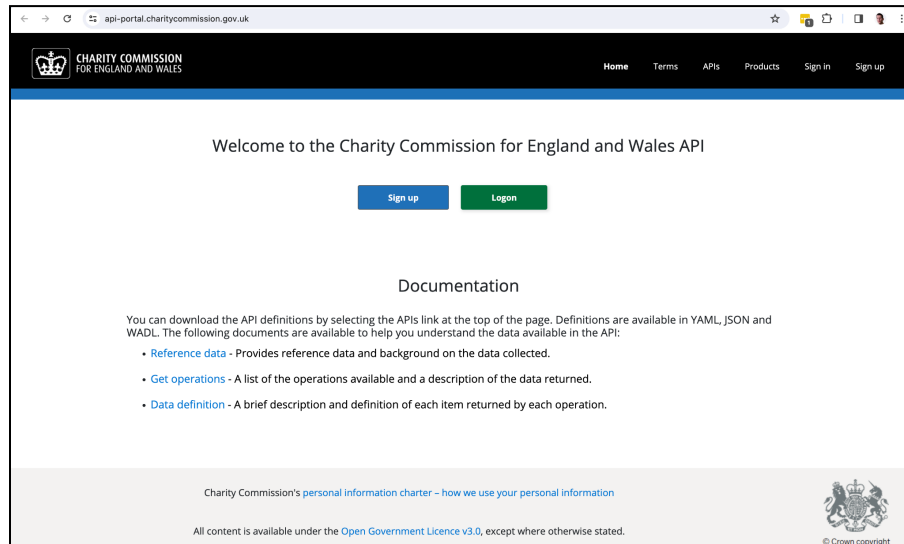
Prerequisites

Before you start you need to go to the Charity Commission API website (<https://api-portal.charitycommission.gov.uk/>) and sign up to get Access to the API. Once you have an account, generate the API key for use by the Integration and then install the App from the Salesforce AppExchange.

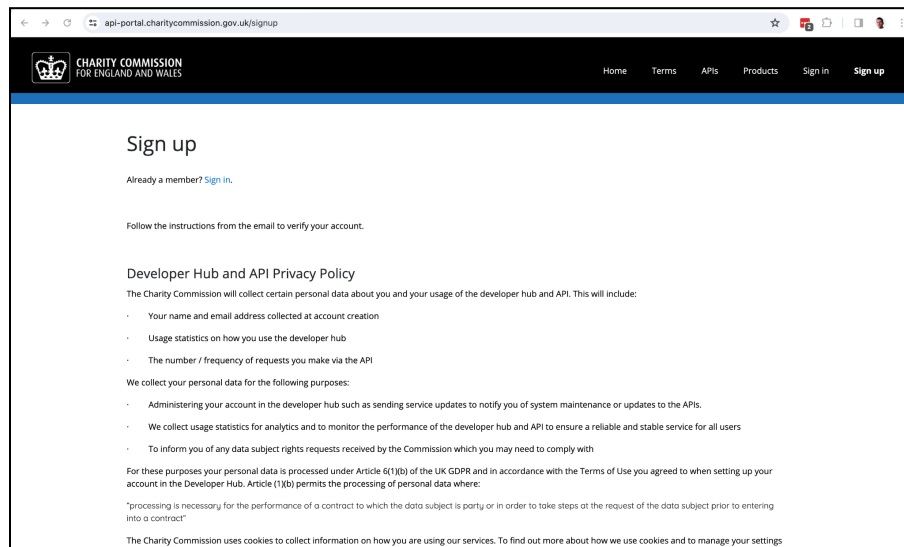
Charity Commission Sign Up Process

This was the process in January 2024, but this may have been changed since.

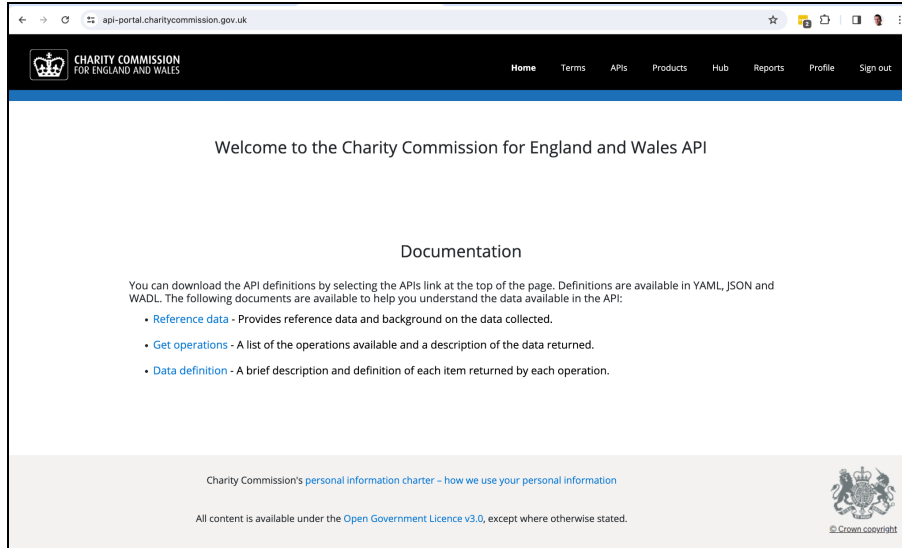
<https://api-portal.charitycommission.gov.uk/>



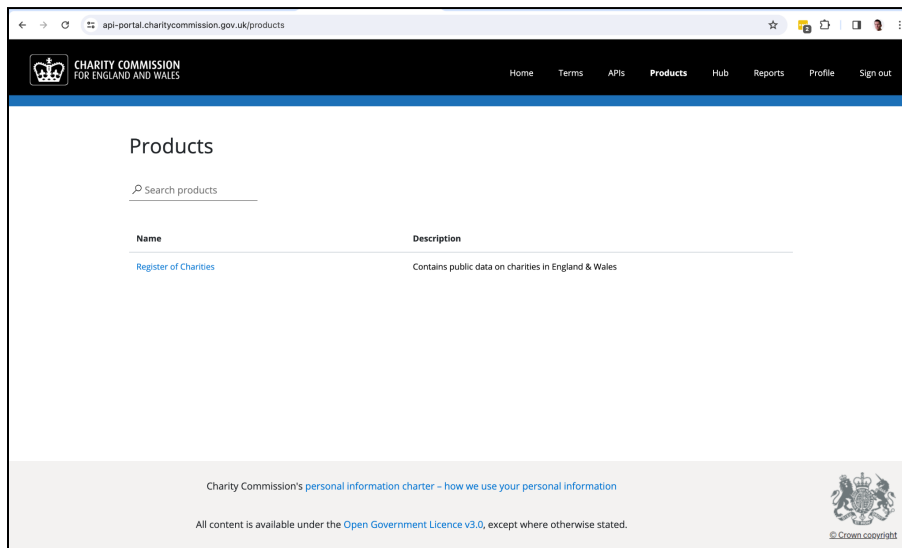
Click on Sign-up



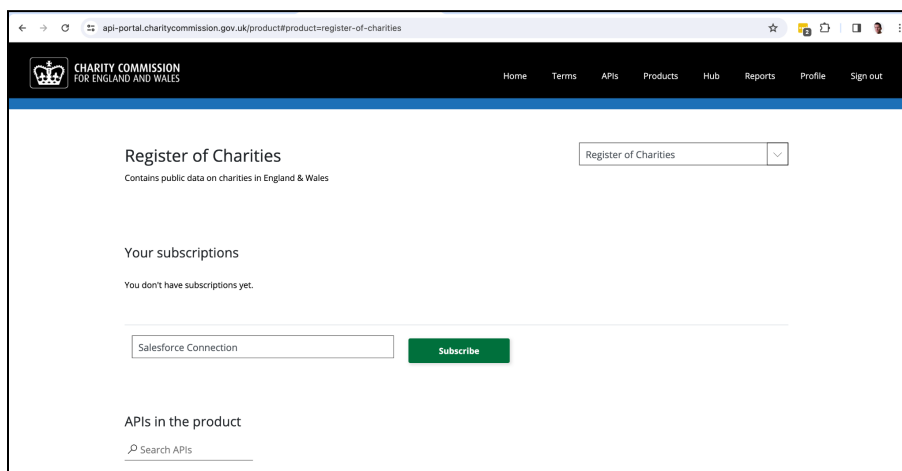
Then you have to look for an email from them, with a login link.

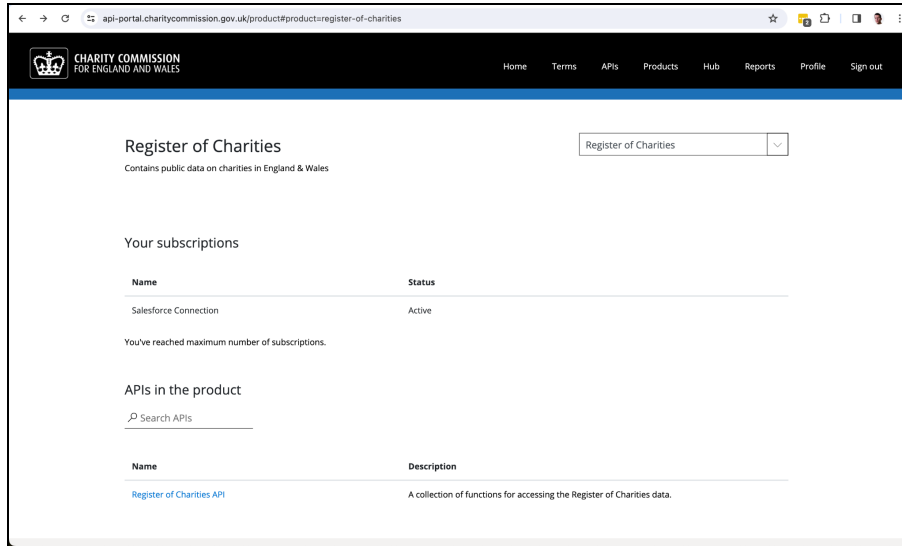


Now navigate to Products, they have only one at the time of writing. Drill Down into this

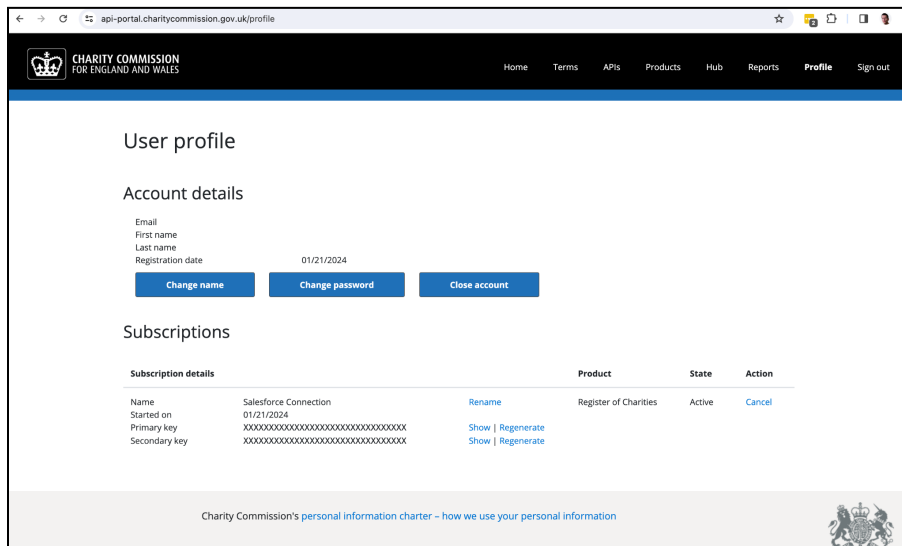


Subscribe to this Product



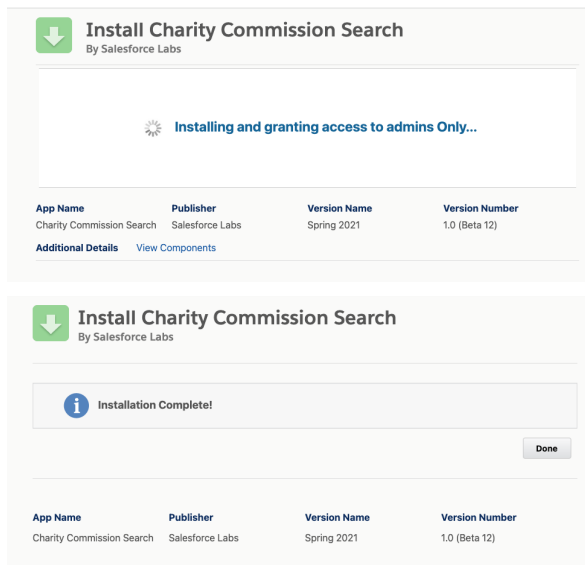


Lastly navigate to your Profile, where you can see the Subscription and access the Primary Key which you will need in your Salesforce settings.

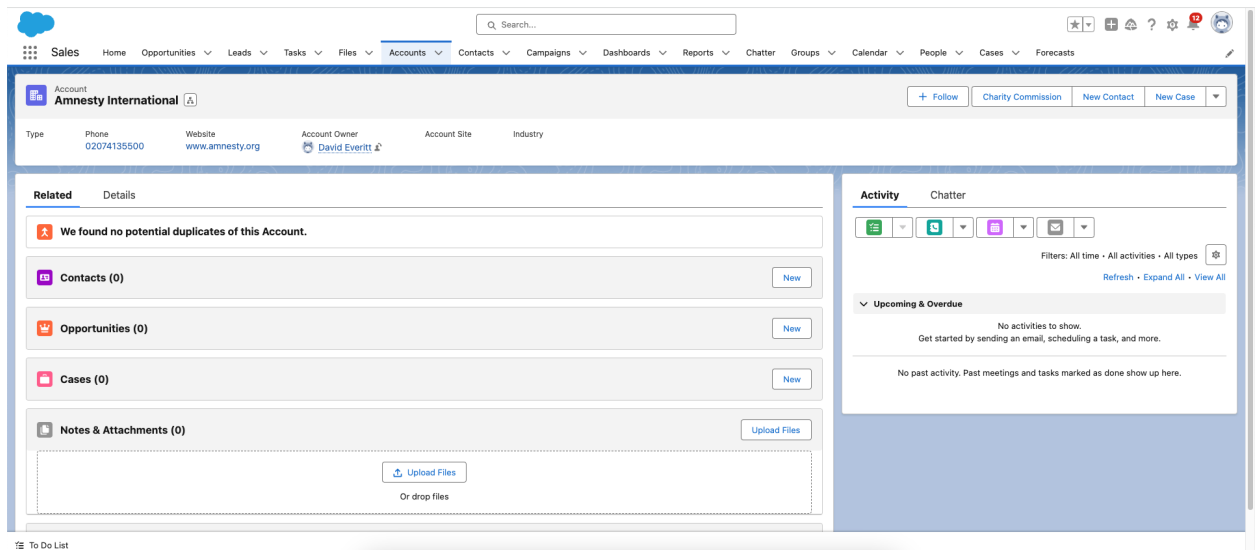


Salesforce Setup

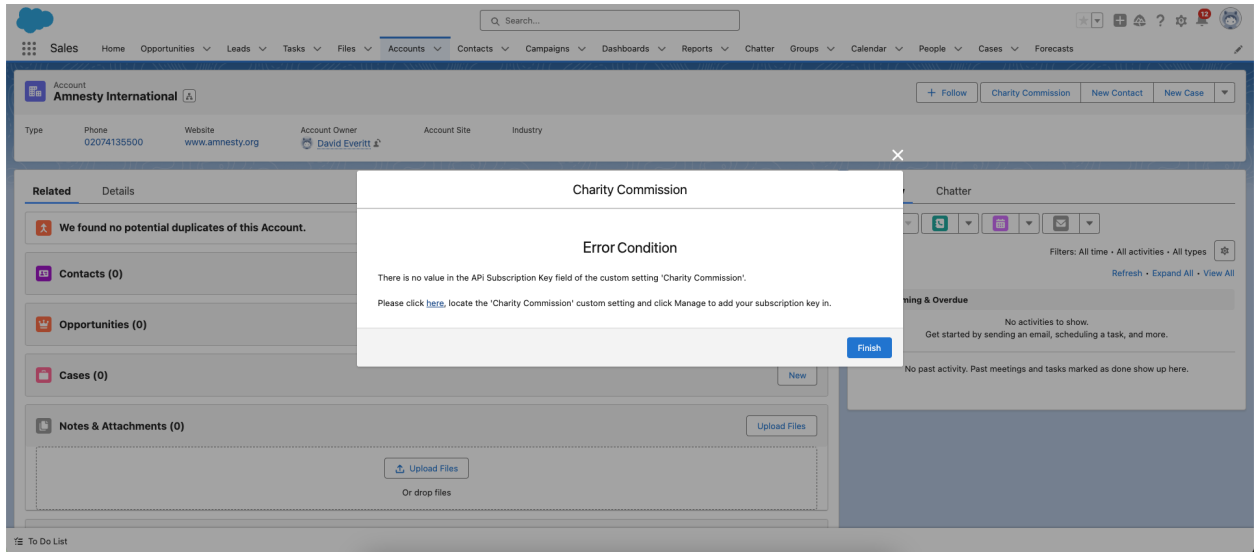
- 1) Install the Package in your org using the link from the AppExchange



- 2) In your Salesforce Org, navigate to the Account Object, and on the Page Layout of your choice add the 'Charity Commission' Action to the section for **Salesforce Mobile and Lightning Experience Actions**, and add a section on the page to show the following new fields: Charity Type, Date of Registration, Link to Charity Commission, Organisation Number, Registered Charity Number and Registration Status
- 3) Navigate to an Account record, and click the 'Charity Commission' button on the page.



- 4) When the error message pops up, click on the hyperlink to be taking to the Custom Settings page, where you need to find the Charity Commission custom setting and click Manage, to enter in the Primary API key you got from the Charity Commission in the API Subscription Key field of the Custom Setting.



5) You should be all set up.

Get Started

Navigate to an Account record, and click on the Charity Commission button, you should be able to search by Charity Name or by Charity Number if you know it.

The screenshot shows a CRM interface with a modal titled "Charity Commission". The modal has two search options: "Enter Charity Name to search by" and "Enter Registered Charity Number to search by". The first option is selected, and the text "Amnesty International" is entered into the search field. Below the search fields is a "Next" button. The background shows the account details for "Amnesty International" with fields for Type, Phone, Website, Account Owner, Account Site, and Industry.

The screenshot shows the same CRM interface, but the modal now displays search results. The modal title is "Charity Commission". Below the title, it says "Showing 3 of 3 items - 1 item selected". There is a table with the following columns: "Account Name", "Registered Charity ...", "Registration Status", and "Date of Registration". The table contains three rows of data:

Account Name	Registered Charity ...	Registration Status	Date of Registration
☐ AMNESTY INTERNATIONAL BRITISH SECTION CHARITABLE TRUST	294279	Removed	24 Apr 1986
☒ AMNESTY INTERNATIONAL CHARITY	294230	Registered	17 Apr 1986
☐ AMNESTY INTERNATIONAL UK SECTION CHARITABLE TRUST	1051681	Registered	4 Jan 1996

Below the table are "Previous" and "Next" buttons. The background shows the account details for "Amnesty International" with fields for Type, Phone, Website, Account Owner, Account Site, and Industry.

Advanced

The flow that is part of the package is called 'Search for Charity by Name'. It's been created as a flow template so you can create your own flows based on it and change how it works.