DonorSearch 360+ for Salesforce

Installation & Configuration Guide

Overview

DonorSearch 360+ is a Salesforce-native application that brings DonorSearch's comprehensive wealth screening and AI-powered donor insights directly into your Salesforce CRM. Once installed, your team can screen contacts, leads, and person accounts without ever leaving Salesforce.

This guide walks your Salesforce Administrator through the complete installation and configuration process. Estimated setup time is 1–2 hours.

Before You Begin

Please confirm the following before starting:

- You have Salesforce System Administrator access
- Your organization has an active DonorSearch subscription with available screening credits
- You have your DonorSearch API Key available (contact clientsupport@donorsearch.net if needed)

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STEP 1 INSTALL THE PACKAGE FROM SALESFORCE APPEXCHANGE

Install DonorSearch 360+ directly from the Salesforce AppExchange or using the package link provided by your DonorSearch representative.

1. Go to the Salesforce AppExchange and search for “DonorSearch 360+” — or use the direct package link provided by your DonorSearch account representative.
2. Click Get It Now and log in with your Salesforce credentials if prompted.
3. Choose to install for All Users or Admins Only (you will assign user-level access via Permission Sets in Step 3).
4. Click Install and wait for the installation to complete. You will receive a confirmation email from Salesforce.

STEP 2 ADD THE DONORSEARCH RATING WIDGET TO YOUR RECORD PAGE(S)

The DonorSearch Rating Widget must be manually added to your Salesforce Lightning record page(s). Add it to whichever object types your organization uses:

Contact Records

1. Open any Contact record in Salesforce.
2. Click the gear icon ( ) in the upper-right corner and select **Edit Page**.
3. In the Lightning App Builder, find **DonorSearchRatingWidget** in the left-hand components panel.
4. Drag the widget onto the page layout in your preferred location.
5. Click Save, then click Activate and choose your activation scope.

Lead Records

Repeat the same steps above starting from a Lead record.

Person Account Records (if applicable)

If your Salesforce org uses Person Accounts, repeat the same steps starting from a Person Account record. DonorSearch 360+ fully supports Person Accounts.

NOTE	*You only need to add the widget to the record types your organization actively uses. Most organizations will add it to Contact records at minimum.*

STEP 3 ADD THE DONORSEARCH PROFILE OBJECT TO THE PAGE LAYOUT

In addition to the widget, add the DonorSearch Profile related list to the same record page layout. This allows users to view profile history and compare screening results over time.

1. On the same record page where you added the widget, click the gear icon and select **Edit Page** again.
2. Add the DonorSearch Profiles related list component to the page.
3. Click **Save** and **Activate**.

Repeat for each record type (Contact, Lead, Person Account) as applicable.

STEP 4 ASSIGN PERMISSION SETS TO USERS

DonorSearch 360+ includes two permission sets that control access to the application. Assign them to users based on their role:

Permission Set	Who Receives It	Access Level
DonorSearch User	All end users who need to screen records and view results	Screen records, view results, use batch screening
DonorSearch Admin	Salesforce Administrators only	All user access + configure settings, API key, field mapping

To assign a permission set:

1. Go to **Setup → Users → Permission Sets.**
2. Click **DonorSearch User** or **DonorSearch Admin.**
3. Click Manage Assignments → Add Assignments.
4. Select the users who should receive this permission set and click Assign.

NOTE

The installing user automatically receives the DonorSearch Admin permission set. All other users will need to be assigned permissions manually.

STEP 5 ENTER YOUR DONORSEARCH API KEY

DonorSearch 360+ connects to the DonorSearch platform using your organization's API key. This must be entered before any screening can take place.

1. Click the App Launcher (the 9-dot grid icon in the top navigation bar).
2. Search for and open DonorSearch Settings.
3. Enter your DonorSearch API Key in the API Key field.
4. Click Save.

If you do not have your API key, please contact DonorSearch support at clientsupport@donorsearch.net.

STEP 6 CONFIGURE CUSTOM FIELD MAPPING

Field mapping tells DonorSearch 360+ which Salesforce fields to send when screening a record. Accurate field mapping improves matching accuracy and the quality of your screening results.

Accessing the Field Mapping Settings

1. Go to the App Launcher and search for DonorSearch Settings Manager.
2. Select the appropriate tab for the record type you want to configure: Contact, Lead, or Person Account.

How to Map a Field

1. Click on any field row in the mapping interface.
2. A modal will open displaying available Salesforce fields.
3. Search for or browse to the Salesforce field you want to map.
4. Click the field to select it.
5. Click Save Mappings when finished.

Available Field Categories

Standard Fields (mapped automatically during install):

- Name: First, Last, Middle, Prefix, Suffix
- Home Address: Street, City, State, ZIP
- Phone and Email
- Seasonal/secondary address fields
- Business/employer information

Optional / Custom Fields:

- Giving history: Largest gift, total gifts, last gift, first gift
- Up to 20 custom pass-through fields (user1–user20) for any additional data

To remove a field mapping, click the X button next to any mapped field.

NOTE	*The Settings Manager has separate tabs for Contact, Lead, and Person Account. Each object type maintains its own field mapping configuration. Be sure to configure all object types your organization uses.*

You're All Set!

Once all six steps are complete, DonorSearch 360+ is fully configured and ready to use. Your team can begin screening records immediately from any Contact, Lead, or Person Account record page in Salesforce.

Installation Checklist

☐ Step 1: Package installed from AppExchange or package link
☐ Step 2: DonorSearch Rating Widget added to record page(s)
☐ Step 3: DonorSearch Profile object added to page layout(s)
☐ Step 4: Permission sets assigned to all appropriate users
☐ Step 5: API key entered and saved in DonorSearch Settings
☐ Step 6: Field mapping configured for all applicable record types

Need Help?
If you run into any issues during installation, our support team is here to help.

Email: clientsupport@donorsearch.net
Web: www.donorsearch.net

Common issues and their solutions can also be found in the DonorSearch 360+ Help Center. Your Salesforce administrator can troubleshoot permission and page layout issues within Salesforce Setup.