

VRP CONSULTING - GIVING X - USER GUIDE

Bring your giving site data into Salesforce

4th February 2021

VRP Solution Architect

Dan Collis

dan.collis@vrpconsulting.com

+44 7841 697366

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Document History

Revision Number	Revision Date	Summary of Changes	Author(s)
Version 1.0	4th January 2021	First Draft	Dan Collis

Reference Documents

Please see the following documents for more information:

Document Name	Version	Author

Purpose of this Document

This document will provide the user with detailed configuration steps, an overview of the processes that can be performed within the Giving X app, FAQs and a description of the data model.

What is Giving X?

GivingX has been designed and developed by VRP Consulting to allow charities and nonprofit organisations to integrate data from the giving sites (e.g. JustGiving) they utilise to Salesforce.

The connector app removes the manual, laborious and error-prone exporting and importing data tasks that charities have to run every week from giving sites to their Salesforce org, saving around 40 hrs per month.

This solution provides all the rich data giving sites can provide via API. This data includes granular information on donors, fundraisers and campaigns that the charities are running.

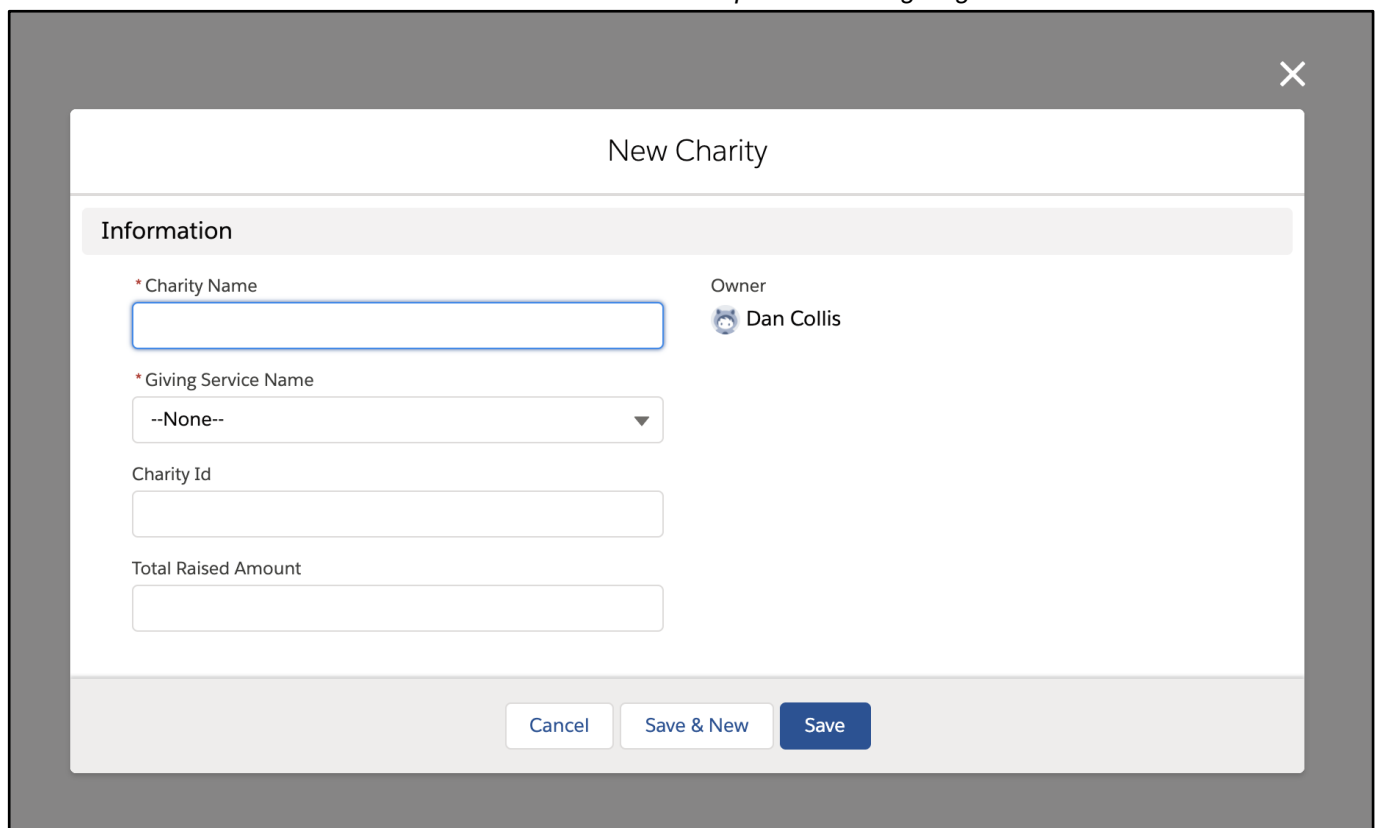
This information can inform future campaigns and drive automated marketing to top donors and fundraisers. Charities can also see details of giving site fees and gift aid contributions.

Configuring a Connection to your Giving Sites

It is recommended that you first test the connection to a Giving Site in a sandbox environment to ensure that the data that is pulled into your platform is as expected and does not conflict with any custom data model components you have in your specific Salesforce instance.

To create a connection to a Giving site you can follow these steps:

1. Create a charity record. This is a charity as is recognised by the giving site, so if your charity has multiple brands that use different accounts on a giving site you will want to have multipl records. You should populate the Charity ID with the giving site ID of your charity.
These records act as a container for all data that is imported from a giving site.

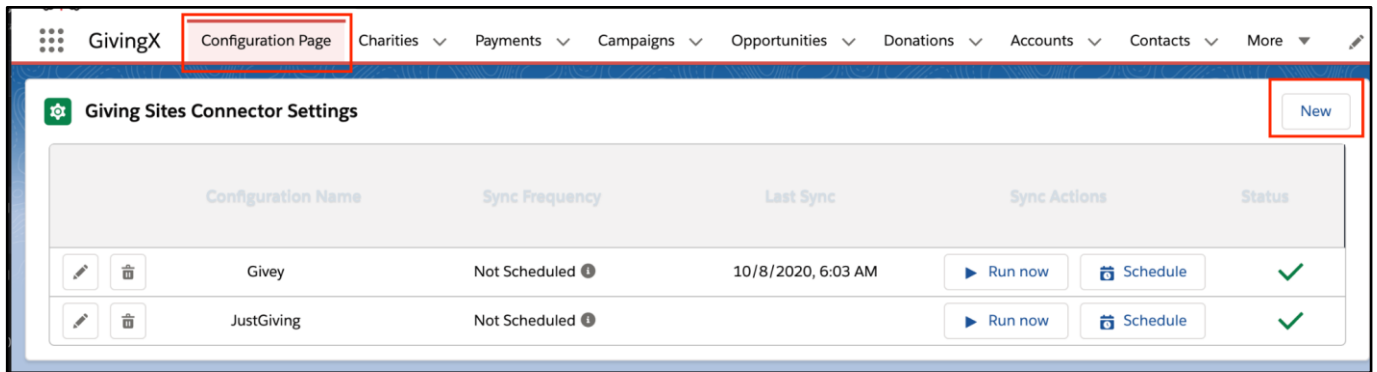


The screenshot shows a 'New Charity' form within a Salesforce interface. The form is titled 'New Charity' and has a close button (X) in the top right corner. It contains several input fields and a dropdown menu. The 'Charity Name' field is required and is currently empty. The 'Giving Service Name' field is a dropdown menu with '--None--' selected. The 'Charity Id' field is empty. The 'Total Raised Amount' field is empty. The 'Owner' field shows a user profile for 'Dan Collis'. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

Information	
* Charity Name	Owner
	 Dan Collis
* Giving Service Name	
--None--	
Charity Id	
Total Raised Amount	

Cancel Save & New Save

2. Next you can create a connector configuration. Click on the "Configuration Page" tab and select New.



3. You can give the connector any name, though it may help to include the name of the giving site. Select the charity you have just created in step 1. Then you can select the Stage that the connector will create opportunities and close opportunities to. Opportunities are giving pages and for some giving sites the connector receives information on the active status of the page. Where this is the case these stages will be used. If this information is not available from the giving site then all Opportunities will be created in the active stage and remain in this state unless closed manually.

The 'Create Configuration' dialog box is shown. It has a title bar with a close button (X). The dialog contains four required fields, each with an asterisk (*) and a label:

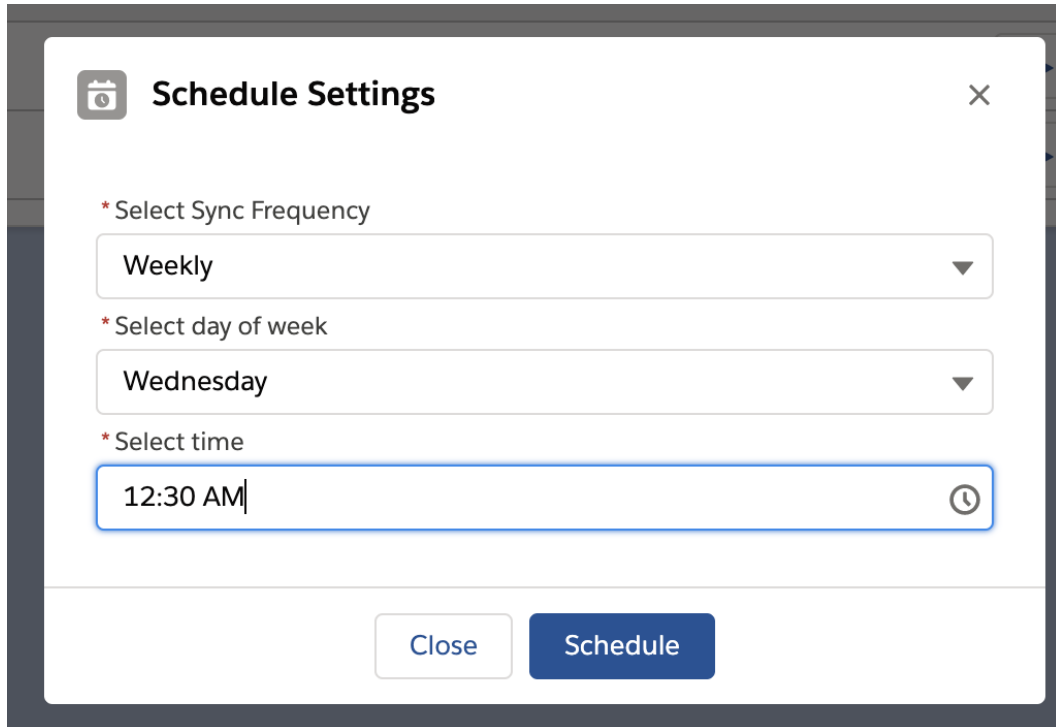
- * Configuration Name: A text input field with the placeholder 'Type here...'.
- * Select Charity: A text input field with the placeholder 'Type to search...'.
- * Stage for active fundraising pages: A dropdown menu with the placeholder 'Type here...'.
- * Stage for inactive fundraising pages: A dropdown menu with the placeholder 'Type here...'.

At the bottom of the dialog are two buttons: 'Close' and 'Save'.

4. Once saved you can choose to run the connector adhoc by using the run now button:

▶ Run now

Or you can schedule the import of the data to run regularly by clicking “Schedule”.



Schedule Settings

* Select Sync Frequency
Weekly

* Select day of week
Wednesday

* Select time
12:30 AM

Close Schedule

Here you can choose from daily, weekly or monthly imports.

5. Once running you will see a loading icon, this can take several minutes to run depending on the amount of data you have in your giving site account. Once finished you will see a green tick.
6. Now navigate back to the charity record that you created in step one. This should have all the data from your giving site. This will depend on how you use the giving site. For example, if you do not use campaigns to segment your efforts in the giving site then all your opportunities will just be linked to the charity record. The type of data that is available from each site differs based on what is made available from the giving site's API. See the table in appendix B to see the available objects in each site.

Processes that can be performed with Giving X

Now that you have your data in your CRM system you may want to consider the following.

Email Automation: Do you want to send an email to a fundraiser when a fundraising page is created to help them in their efforts? This can be achieved using workflow rules or your email marketing tool if integrated with Salesforce.

Donation Acknowledgement: For donations over a certain amount do you want to create a task for your team to follow up with a personal thank you phone call. This can be set up using standard Salesforce workflow rules.

Report on Performance: GivingX offers some reports and dashboards but if you have any existing reporting, make sure that your GivingX records are included in the filters for your reporting.

FAQs

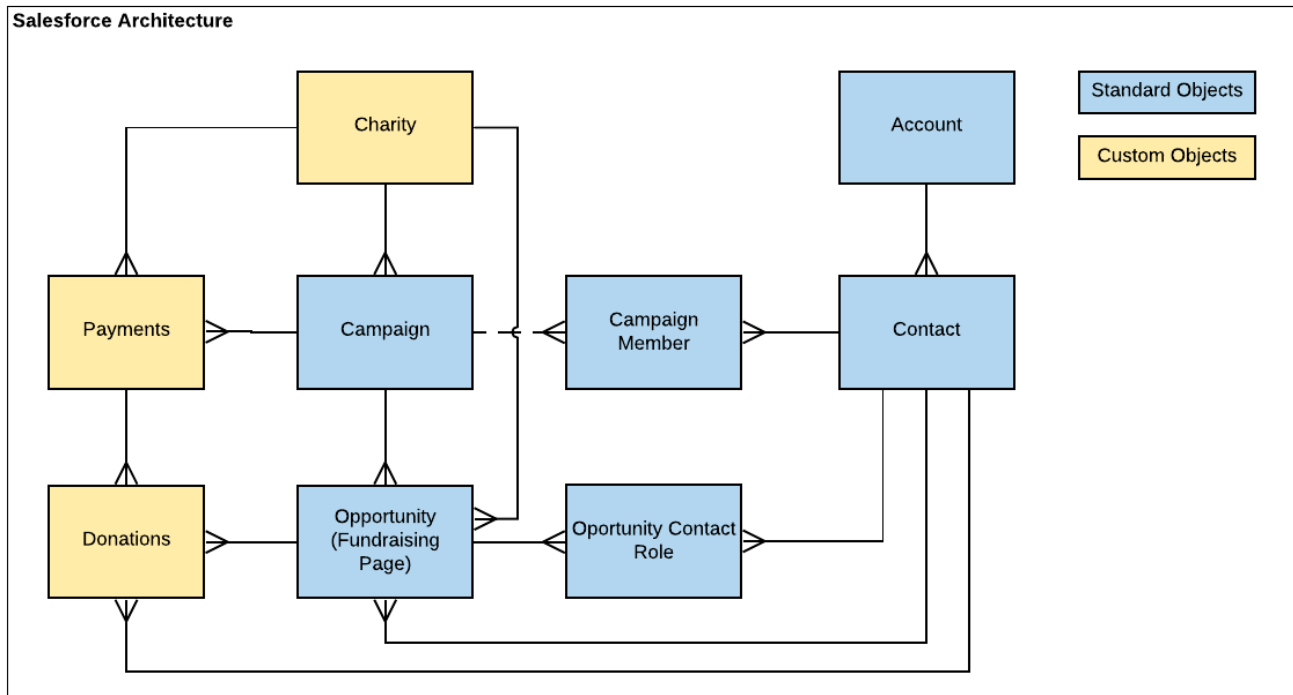
Q: My sync is not pulling in any or all data.

A: First check that the username and password that you have authenticated the connection with has access to the data. Next, you will need to check any validation rules and mandatory fields on the object that are not being created. For validation rules, you may need to add to the rule that the Record Type is not equal to "GivingX". This will stop the validation rule from firing on records created via the connector. For mandatory fields, see if they are populated by the connector in the data dictionary below. If they are custom fields then they will not be and you may need to make them mandatory on the page layout rather than on the field (database) level.

Giving X Data Model

ERD

Below is the data model that GivingX add to your Salesforce instance in order to store Givign Site information.



Object	Description
Charity	This object is the container or parent for all data this bought in for a specific Giving Site and the charity account that authenticates the connection.
Payments	These are the payments made to the charity from the giving site and are usually a summation of a number of donations over a period of time, minus a transaction fee.
Donations	These are the individual donations made against a fundraising page campaign or directly to the charity.
Accounts	Accounts are created for fundraisers or donors. They are the family name of the individual.
Contacts	Contacts are created for fundraisers or donors. Where donations are anonymous, they will be captured with the giving site ID and any future donations that are not made anonymously will allow the integration to append their data.

Opportunity	These are created for fundraising pages. The pages can be directly linked to the charity or to specific campaign the charity has set up in the giving site.
Opportunity Contact Role	All donors and the fundraiser(s) will be linked to an opportunity using Opportunity Contact Roles.
Campaigns	Campaigns are available through some giving sites
Campaign Member	

Data Dictionary

Field Name	Field API Name	Object Name	Object API Name	Type	Reference/Property	Standard/Custom	Mandatory	External Id
Name	Name	Account	Account	Text(80)	Property	Standard	Yes	No
Virgin Money Giving ID	VirginMoneyGivngId__c	Account	Account	Text(100)	Property	Custom	No	Yes
Givey Id	GiveyId__c	Account	Account	Text(100)	Property	Custom	No	Yes
JustGiving Id	JustGiving_Id__c	Account	Account	Text(100)	Property	Custom	No	Yes
First Name	FirstName	Contact	Contact	Text(40)	Property	Standard	No	No
Last Name	LastName	Contact	Contact	Text(40)	Property	Standard	Yes	No
Account Name	AccountId	Contact	Contact	Lookup(Account)	Reference	Standard	No	No
Email	Email	Contact	Contact	Email	Property	Standard	No	No
Virgin Money Giving ID	VirginMoneyGivngId__c	Contact	Contact	Text(100)	Property	Custom	No	Yes
Givey Id	GiveyId__c	Contact	Contact	Text(100)	Property	Custom	No	Yes
JustGiving Id	JustGiving_Id__c	Contact	Contact	Text(100)	Property	Custom	No	Yes

Name	Name	Opportunity	Opportunity	Text(80)	Property	Standard	Yes	No
Stage	Stage	Opportunity	Opportunity	Picklist	Property	Standard	Yes	No
Primary Campaign Source	CampaignId	Opportunity	Opportunity	Lookup(Campaign)	Relationship	Standard	No	No
Charity	Charity__c	Opportunity	Opportunity	Lookup(Charity)	Relationship	Custom	No	No
Fundraising Page Created Date	FundraisingPageCreatedDate__c	Opportunity	Opportunity	Date/Time	Property	Custom	No	No
Fundraising Page Expiry Date	FundraisingPageExpiryDate__c	Opportunity	Opportunity	Date/Time	Property	Custom	No	No
Fundraising Page Id	FundraisingPageId__c	Opportunity	Opportunity	Text(100)	Property	Custom	No	Yes
Fundraising Page Title	FundraisingPageTitle__c	Opportunity	Opportunity	Text(120)	Property	Custom	No	No
Fundraising Page URL	FundraisingPageURL__c	Opportunity	Opportunity	URL(255)	Property	Custom	No	No
Target Amount	TargetAmount__c	Opportunity	Opportunity	Currency(16, 2)	Property	Custom	No	No
Total Raised Amount	TotalRaisedAmount__c	Opportunity	Opportunity	Currency(16, 2)	Property	Custom	No	No
Total Raised Gift Aid	TotalRaisedGiftAid__c	Opportunity	Opportunity	Currency(16, 2)	Property	Custom	No	No
Total Raised Gross	TotalRaisedGross__c	Opportunity	Opportunity	Currency(16, 2)	Property	Custom	No	No
Total Raised Net	TotalRaisedNet__c	Opportunity	Opportunity	Currency(16, 2)	Property	Custom	No	No
Total Match Amount	TotalMatchedAmount__c	Opportunity	Opportunity	Currency(16, 2)	Property	Custom	No	No
Charity Name	Name	Charity	Charity__c	Text(80)	Property	Standard	Yes	No
CharityId	CharityId__c	Charity	Charity__c	Text(50)	Property	Custom	No	Yes

Giving Service Name	GivingServiceName__c	Charity	Charity__c	Text(50)	Property	Custom	No	No
Giving Site Total Raised Amount	GivingSiteTotalRaisedAmount__c	Charity	Charity__c	Currency(16, 2)	Property	Custom	No	No
Name	Name	Campaign	Campaign	Text(80)	Property	Standard	Yes	No
Charity	Charity__c	Campaign	Campaign	Lookup(Charity)	Reference	Custom	No	No
Giving Site Campaign Id	GivingSiteCampaignId__c	Campaign	Campaign	Text(100)	Property	Custom	No	Yes
Giving Site Campaign Name	GivingSiteCampaignName__c	Campaign	Campaign	Text(50)	Property	Custom	No	Yes
Giving Site Target Amount	GivingSiteTargetAmount__c	Campaign	Campaign	Currency(16, 2)	Property	Custom	No	No
Giving Site Total Raised Amount	GivingSiteTotalRaisedAmount__c	Campaign	Campaign	Currency(16, 2)	Property	Custom	No	No
Contact	ContactId	Campaign Member	CampaignMember	Lookup(Contact)	Reference	Standard	Yes	No
Campaign	CampaignId	Campaign Member	CampaignMember	Lookup(Campaign)	Reference	Standard	Yes	No
Charity	Charity__c	Payment	Payment__c	Lookup(Charity)	Reference	Custom	No	No
Payment Card Processing Fee	PaymentCardProcessingFee__c	Payment	Payment__c	Currency(16, 2)	Property	Custom	No	No
Payment Commission	PaymentCommission__c	Payment	Payment__c	Currency(16, 2)	Property	Custom	No	No
Payment Datetime	PaymentDatetime__c	Payment	Payment__c	Date/Time	Property	Custom	No	No
Payment Gross Amount	PaymentGrossAmount__c	Payment	Payment__c	Currency(16, 2)	Property	Custom	No	No
Payment Name	Name	Payment	Payment__c	Text(80)	Property	Standard	Yes	No
Payment Net Amount	PaymentNetAmount__c	Payment	Payment__c	Currency(16, 2)	Property	Custom	No	No
Payment Ref	PaymentId__c	Payment	Payment__c	Text(50) (External ID)	Property	Custom	No	No

				(Unique Case Insensitive)				
Campaign	Campaign__c	Donations	Donation__c	Lookup(Campaign)	Reference	Custom	No	No
Charity	Charity__c	Donations	Donation__c	Lookup(Charity)	Reference	Custom	No	No
Donation Datetime	DonationDatetime__c	Donations	Donation__c	Date/Time	Property	Custom	No	No
Donation Id	DonationId__c	Donations	Donation__c	Text(50)	Property	Custom	No	Yes
Donation Name	Name	Donations	Donation__c	Text(80)	Property	Standard	Yes	No
Donor	Contact__c	Donations	Donation__c	Lookup(Contact)	Reference	Custom	No	No
Funraising Page	FunraisingPage__c	Donations	Donation__c	Lookup(Opportunity)	Reference	Custom	No	No
Payment	Payment__c	Donations	Donation__c	Lookup(Payment)	Reference	Custom	No	No
Payment Reference	PaymentReference__c	Donations	Donation__c	Text(50)	Property	Custom	No	No
Processed	Processed__c	Donations	Donation__c	Checkbox	Property	Custom	No	No
Matched Amount	TotalMatchedAmount__c	Donations	Donation__c	Currency(16, 2)	Property	Custom	No	No
Total Amount	TotalAmount__c	Donations	Donation__c	Currency(16, 2)	Property	Custom	No	No

Site Capability Matrix

Functionality and data availability is driven by the giving sites API and therefore below shows what you can expect to receive from each site that GivingX supports.

	Giving Sites >>>		
Functionality	Just Giving	Virgin Money Giving	Givey
Giving Site Record	Yes	Partial	Yes
Totals for Giving Site	Yes	No	Yes
Customisable opportunity stages	Yes	Yes	Yes
Campaign Management	Yes	No	No
Sync giving site campaigns to SF	Yes	No	No
Totals raised for campaign	Yes	No	No
Target for campaign	No	No	No
Create Campaigns from SF	No	No	No
Fundraising Pages	Yes	Yes	Yes
Sync Fundraising pages to SF Opps	Yes	Yes	Yes
Target Amount	Yes	Yes	Yes
Total Raised Amount	Yes	Yes	Yes
Gift Aid Amount	No	No	No
Total Net Amount	No	Yes	No
Fundraisers	Yes	Partial	No

Sync fundraisers to SF	Yes	Yes	No
Name	Yes	Yes	No
Email	Yes	No	No
Address	Yes	No	No
Giving Site ID	Yes	Yes	No
Donations	Yes	No	Yes
Sync Donations	Yes	No	Yes
Link to Fundraising Page	Yes	No	Yes
Link to Campaign	Yes	No	No
Link to Charity	Yes	No	Yes
Link to Payment	Yes	No	No
All passed in GBP	Yes	No	Yes
Donors	Yes	No	No
Sync donors to SF	Yes	No	No
Replace Anonymous if ever receive name	Yes	No	No
Name	Yes	No	No
Email	Yes	No	No
Address	Yes	No	No
Giving Site ID	Yes	No	No

Payments	Yes	No	No
Sync Payments to SF	Yes	No	No
Contains details of donations related?	Yes	No	No