

GiveSmart for Salesforce®

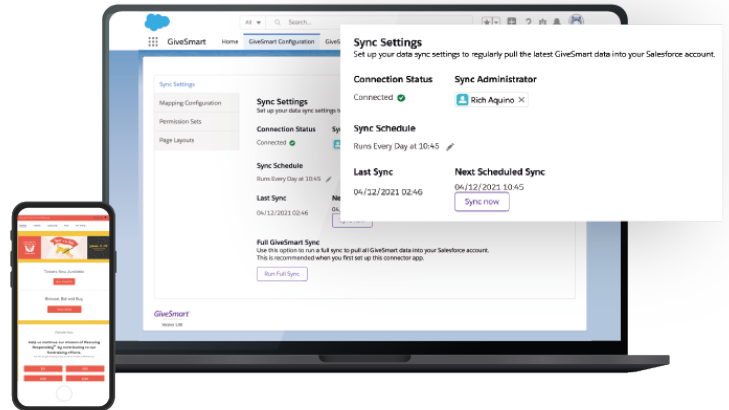
Getting Started

Before you start

Make sure your Salesforce® admin has the GiveSmart API username and password to complete the set up.

Install the connector

Install the GiveSmart for Salesforce® as a managed package into your NPSP Salesforce® instance.

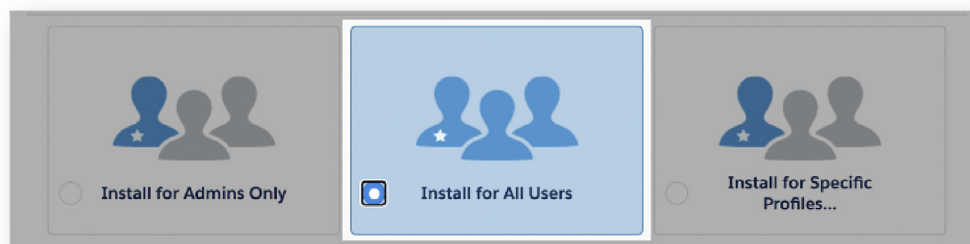


Steps to install

1. Install [Salesforce connector package](#).
2. Enter GiveSmart21 as the installation key.

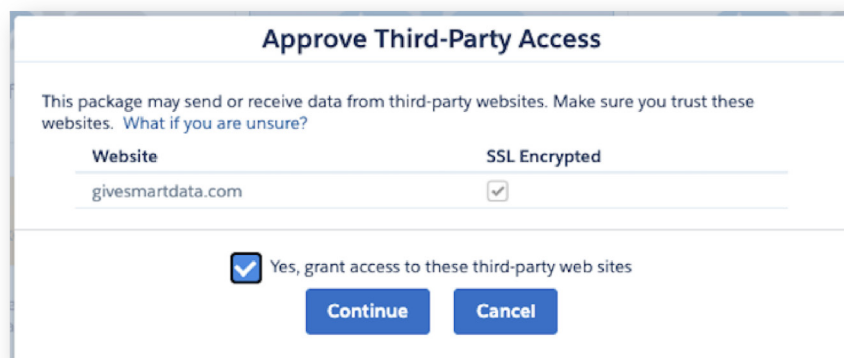


3. Select the users you want to install. We recommend installing for all users.

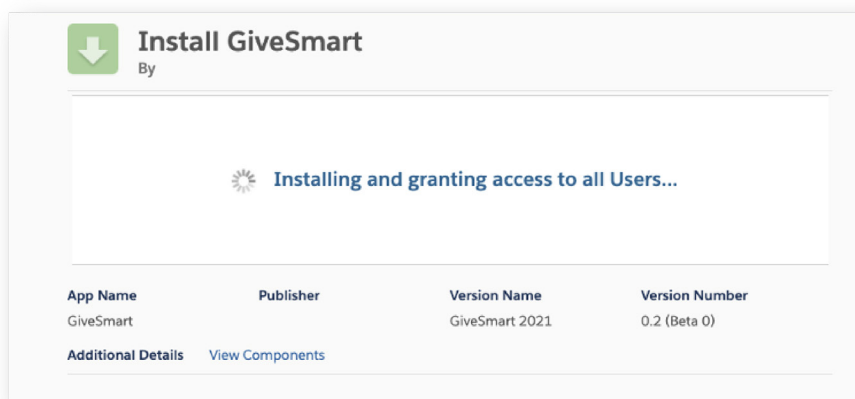


Steps to install

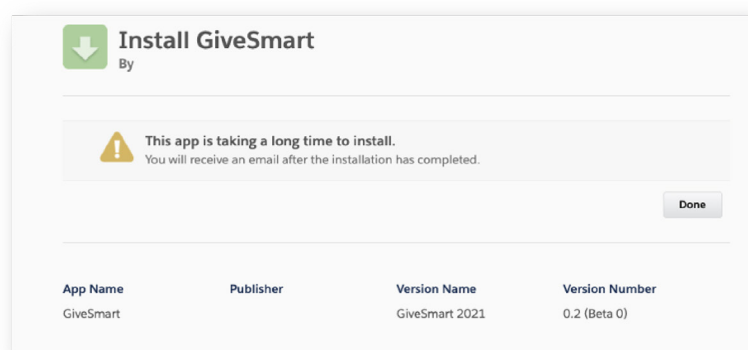
4. Check the acknowledge box and click Install.
5. Check Yes to grant access and click Continue.



6. The installation process will begin.



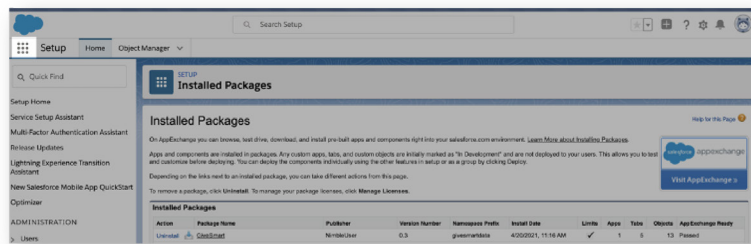
7. If the installation time takes too long, you will receive an email once complete.



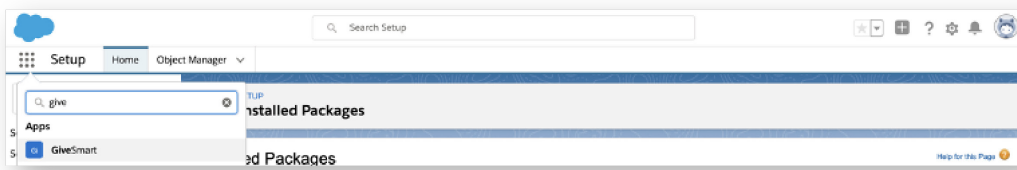
8. Once the installation is complete, you are ready to set up your connector.

Set Up

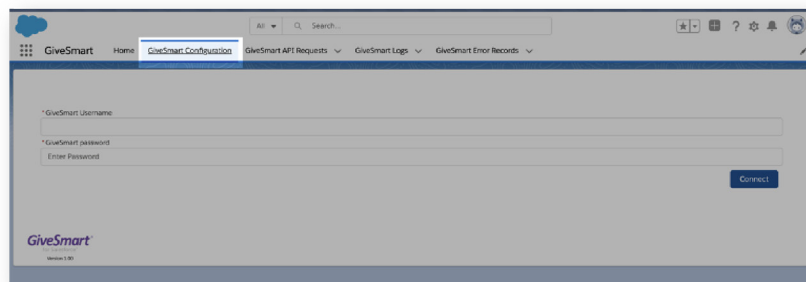
1. Log into your Salesforce® instance.
2. Click the App Launcher.



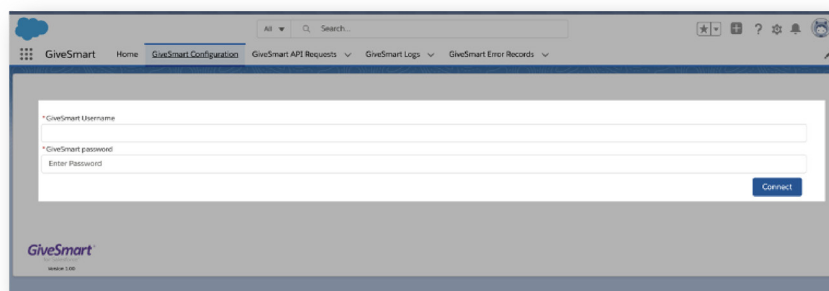
3. Search for GiveSmart



4. Click GiveSmart Configuration



5. Enter your GiveSmart API username and password.



6. Click Connect.

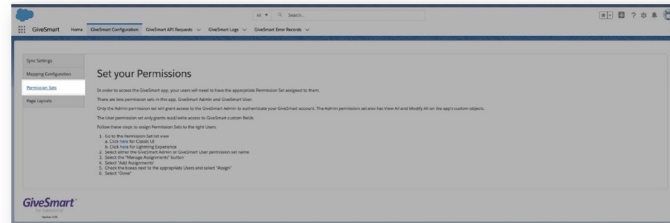
Note: Your API username and password are provided to you from your GiveSmart rep. If you forget your API login credentials, reach out to Support.

Permission Sets

To access the GiveSmart for Salesforce® connector, users require the appropriate assigned Permission Sets.

Locate permissions sets

1. Log in to your GiveSmart for Salesforce® connector.
2. Click Permission Sets.



Set permissions

There are two GiveSmart permission sets in the connector:

- GiveSmart Admin - Access to authenticate your GiveSmart account and can view and modify all custom objects. Access to manage the configuration.
- GiveSmart User - Read/write access to GiveSmart custom fields. Access all of the connector data.

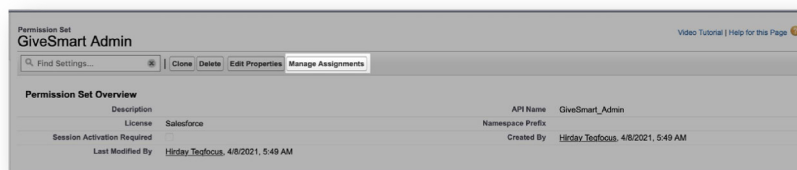
Note: These are Salesforce® permission sets and not related to the user roles assigned within a GiveSmart site

1. From Step 1(b), Click the blue HERE link.

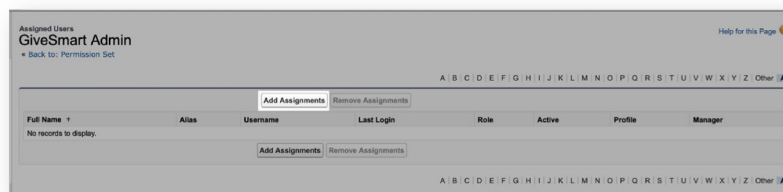
Follow these steps to assign Permission Sets to the right Users.

1. Go to the Permission Set list view
 - a. Click [here](#) for Classic UI
 - b. Click [here](#) for Lightning Experience

2. Click GiveSmart Admin or GiveSmart User.
3. Click Manage Assignments.



4. Click Add Assignments.

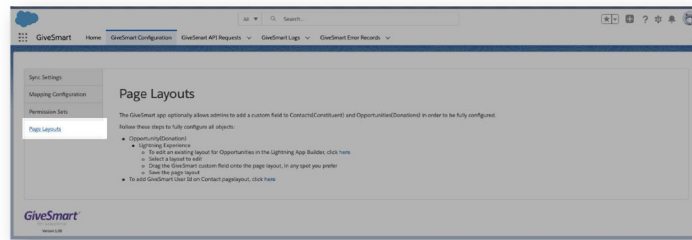


5. Check the boxes next to the appropriate users and select Assign.
6. Once you are complete, click Done to save.

Page Layouts

Locate page layouts

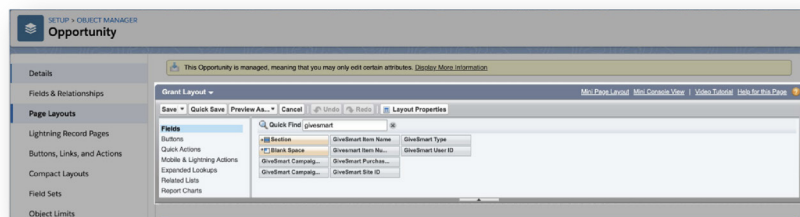
1. Log in to your GiveSmart for Salesforce® connector.
2. Click Page Layouts.



Set opportunity page layout

Edit your existing layout for Opportunities in the Lightning App Builder. We recommend adding all of the available GiveSmart custom fields to your Opportunity page layout. If you have multiple Opportunity page layouts, update one or all of the pages you would like the GiveSmart data to appear.

1. Go to Opportunity (Donation) > Lightning Experience > Edit
2. Click the blue HERE link.
3. Select a layout to edit.
4. Type "GiveSmart" in the Quick Find field to filter to the custom fields.
5. Drag the GiveSmart custom fields onto the page layout.

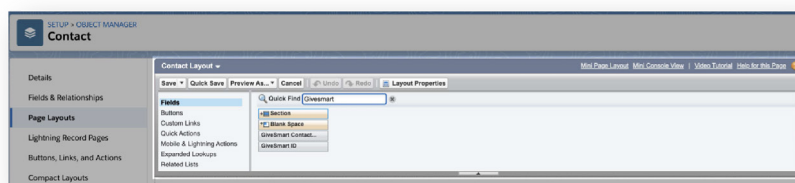


6. Add the GiveSmart fields to an existing page section or create a new section.
7. Once you are complete, Save the page layout.

Set contact page layout

Edit your existing layout for contacts in the Lightning App Builder. We recommend adding all of the available GiveSmart custom fields to your Contact page layout. Contact page layouts, update one or all of the pages you would like the GiveSmart data to appear.

1. Go To add GiveSmart User Id on Contact page layout.
2. Click the blue HERE link.
3. Select a layout to edit.
4. Type "GiveSmart" in the Quick Find field to filter to the custom fields.
5. Drag the GiveSmart custom fields onto the page layout.



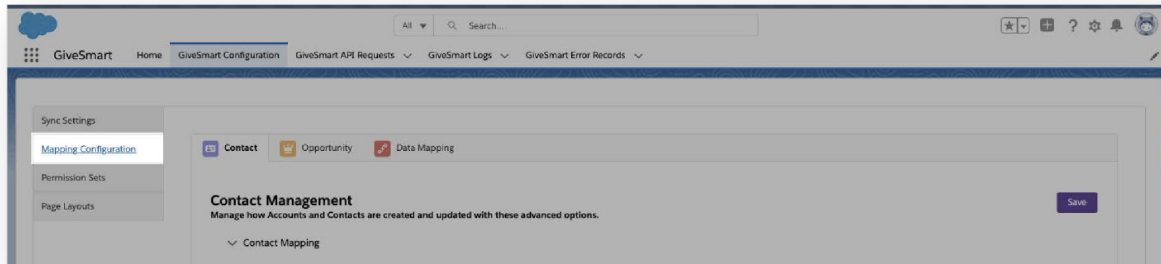
6. Add the GiveSmart fields to an existing page section or create a new section.
7. Once you are complete, Save the page layout.

Mapping Configurations

With the GiveSmart for Salesforce connector, manage how contacts and opportunities are created and updated when synced from GiveSmart to Salesforce. Set your mapping configurations to make sure the GiveSmart fields are coming over on your correct contact and opportunity fields.

Locate mapping configurations

1. Log in to your GiveSmart for Salesforce® connector.
2. Click Mapping Configuration.



Set contact mapping

Contact mapping fields are defaulted to match related standard Salesforce® objects or GiveSmart custom objects. Click the up and down arrows within the Contact Field column to adjust. Grayed-out fields are mapped to GiveSmart custom objects and can't be edited.

Contact matching rules

Set rules for how duplicates or edits to contact names, mailing addresses, and phone numbers sync. Adjusting or selecting any of these rules will overwrite any of the mappings set above.

Contact Record Type

- Click on the arrows to set a default record type. When set, applies to the specified Record Type to all Contact records created.

Contact Name

- Update Existing Contact Name: Updates existing Contact First/Last Name fields with data from GiveSmart. By default, contacts are matched and used to set the value for lookups on other objects, but no contact data is updated.

Contact Phone Number

- Update Existing Contact Phone: Updates the Contact phone number when an existing contact is found.

Contact Address

- Add Contact Mailing Address as Other: Populates mailing address information in the "Other Address" field. By default, Contact mailing address information is added to the standard address fields.
- Update Existing Contact Address: Updates an existing Contact record with address data from GiveSmart. By default, Contacts are matched and used to set the value for lookups on other objects, but no Contact data is updated.

Set opportunity mapping

Opportunity mapping fields are defaulted to match related standard Salesforce® objects or GiveSmart custom objects. Click the up and down arrows within the Opportunity Field column to adjust. Grayed-out fields are mapped to GiveSmart custom objects and can't be edited.

Tip: If your Salesforce Instance utilizes NPSP's Payment object, NPSP workflows will facilitate creating a Payment record. For both GiveSmart's custom Paid field and NPSP's Payment Paid field to stay in sync, we've provided the Process Builder steps to automate this synchronization. See Addendum A

Opportunity configuration

Set the default stage name, opportunity type, and opportunity record type.

Set data mapping

Manage your settings related to data processing.

- Check to disable all triggers. When checked, all triggers utilized by GiveSmart for Salesforce are disabled and the integration is stopped.
- Delete GiveSmart logs periodically to keep your Salesforce data usage lean.

Tip: If you are utilizing Salesforce's native matching rules, before you sync, you need to set a contact duplicate rule exception for GiveSmart.

Set Salesforce Duplicate Rule Exceptions

Before you sync, follow the steps below to set conditions within your Salesforce duplicate rules.

Set a contact duplicate rule exception

1. Click the **Setup Icon** and click Step Up
2. In the **Quick Find**, type in **Duplicate Rules** and select it.
3. Locate and select the **Contact Duplicate Rule**.
4. Click **Edit**.
5. From **Conditions**, enter
 - Field: **Contact: GiveSmart Contact Bypass**
 - Operator: **Equals**
 - Value: **False**
6. Click **Save**.

Set an account duplicate rule exception

Set up a rule to exclude the Sync Administrator which allows the Sync Administrator/GiveSmart Connector to create data as it is in GiveSmart.

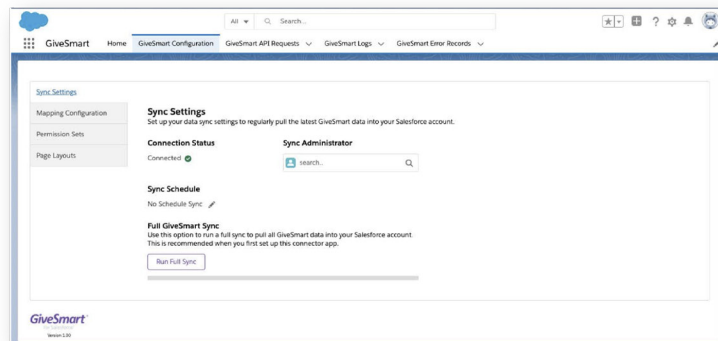
1. Click the **Setup Icon** and click Step Up
2. In the **Quick Find**, type in **Duplicate Rules** and select it.
3. Locate and select the **Contact Duplicate Rule**.
4. Click **Edit**.
5. From **Conditions**, enter
 - Field: **Current User: Username**
 - Operator: **not equal to**
 - Value: **{enter Sync Administrator username}**
6. Click **Save**.

Sync Data

Locate sync settings

Syncs on-demand or on a daily schedule to update or insert data from GiveSmart to Salesforce®. GiveSmart users are updated or inserted into Salesforce® contacts. Donations, tickets, and item purchases are updated or inserted into Salesforce® opportunities.

1. Log in to your GiveSmart for Salesforce® connector.
2. Click sync Settings



Run an initial full sync

Once contact and opportunity mapping configurations and a Sync Administrator is assigned, Run Full Sync to pull all GiveSmart data into Salesforce®. The full sync copies all existing donor and opportunity data from GiveSmart into Salesforce. Subsequent scheduled syncs update Salesforce® with new or modified records.

Tip: We recommend running the first full sync during off-hours as it may slow down Salesforce performance.

Set a sync schedule

After the initial sync, set a Sync Schedule. Select between hourly or daily syncs. Your last sync and next scheduled sync date and time appear below the scheduler. Daily syncs run at the time you've set. Hourly syncs run on the hour (2:00, 3:00, 4:00...).

Need to sync earlier than the next scheduled time?

Click Sync Now to override the scheduled time. The next scheduled sync remains based on the scheduler and maintains the set schedule.

Sync Request, Logs & Records

Review GiveSmart API request

Every sync has a related GiveSmart API Request record. Click the record to access its details which include helpful information about the status, actions (create or update), and contacts or opportunity details.

Review GiveSmart logs and error records

View additional details from GiveSmart Logs and GiveSmart Error Records