

# DONORSEARCH 360io

## Salesforce Application

### INSTALLATION GUIDE



**Thank you for choosing DonorSearch 360io.**

Jointly developed with our partners at Salesforce, this solution will help you maximize your time and achieve your fundraising goals effectively. This installation guide will show you how to set up our integrated solution in Salesforce, so you can efficiently gain insight into your new donor's capability, inclination, and overall potential.

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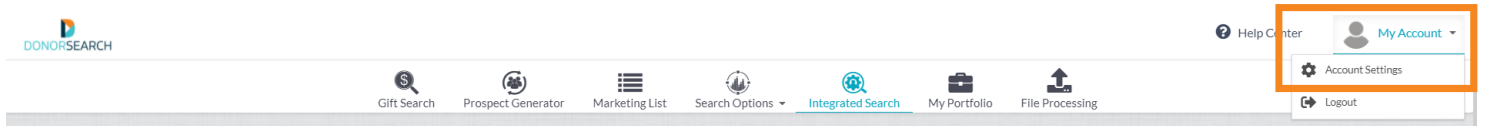
- Part 1: Accessing Your API Key From DonorSearch
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## Part 1: Accessing Your API Key From DonorSearch

First, you will receive a welcome email from DonorSearch with instructions to set up your account on the DonorSearch platform.

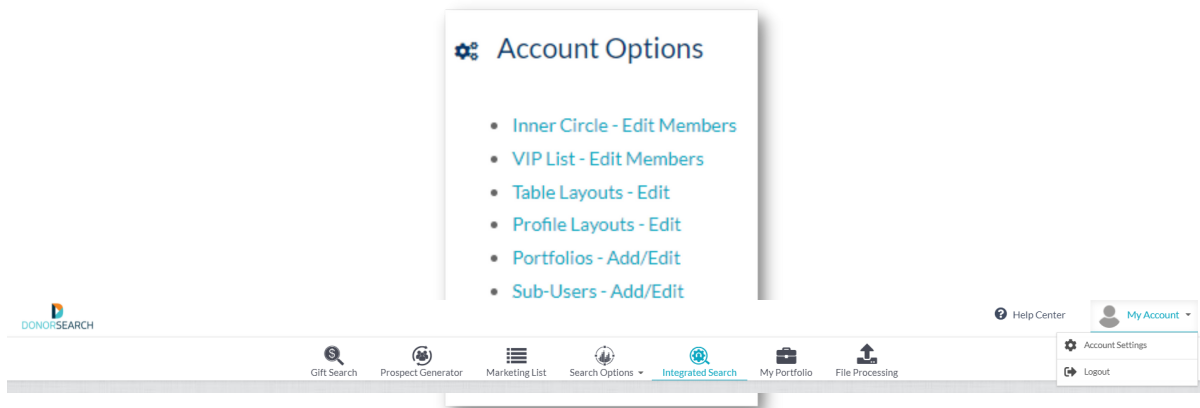
Once you are logged into your account:

- Click on My Account in the upper right-hand corner.
- Click on Account Settings.

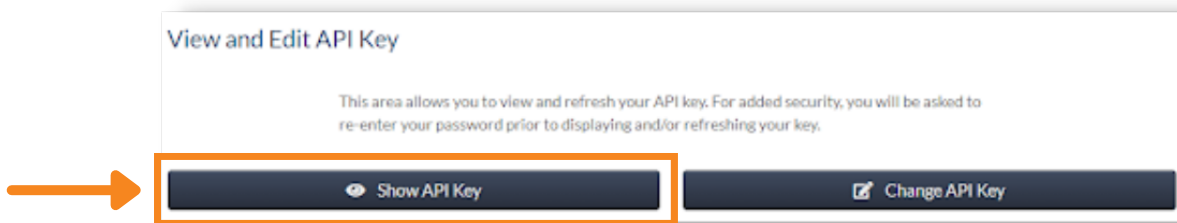


Under Account Options:

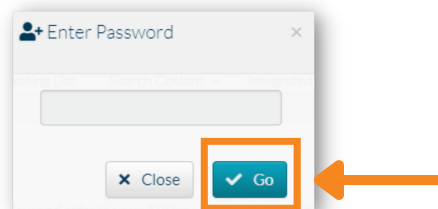
- Click on [API Key – View/Edit](#)



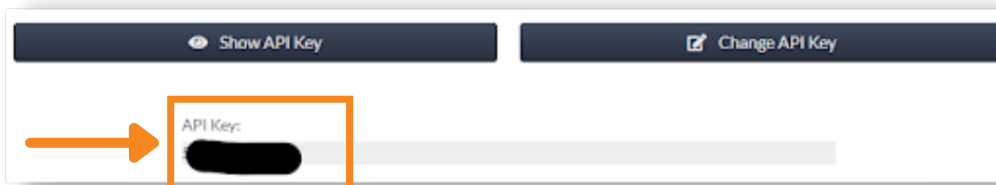
Click [Show API Key](#).



Enter your password and click [Go](#)

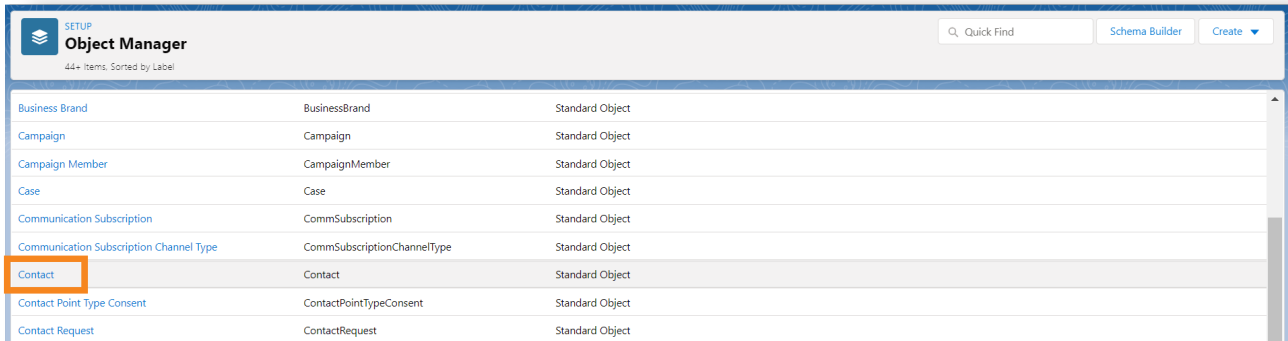


Your [API key](#) will appear

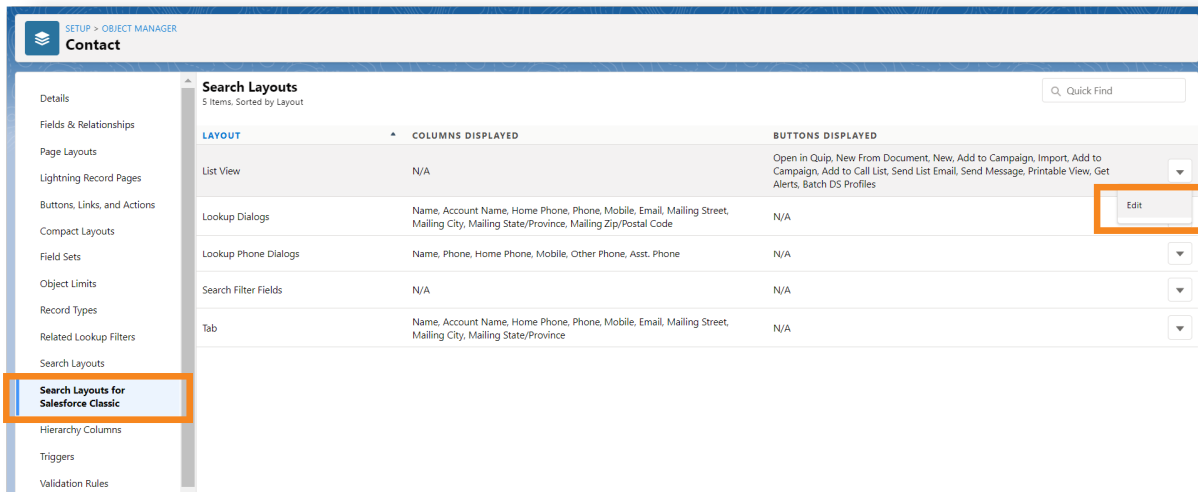




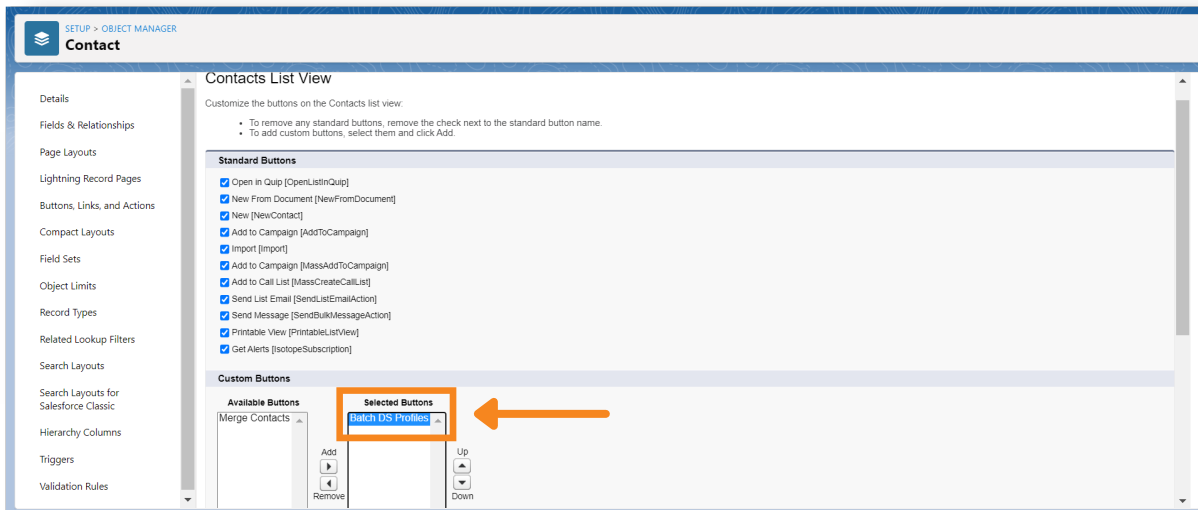
In Quick Find, find and select Object Manager and click the Contact object.



Navigate to Search Layouts for Salesforce Classic and click the dropdown and edit button in the List View line item.

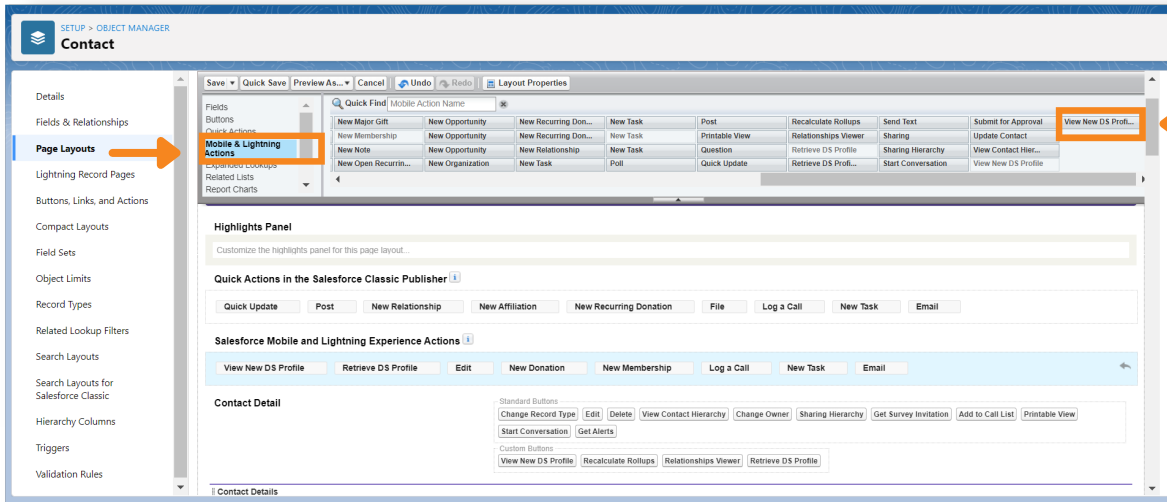


Add Batch DS Profiles from the Available Buttons to the Selected Buttons, and click Save.

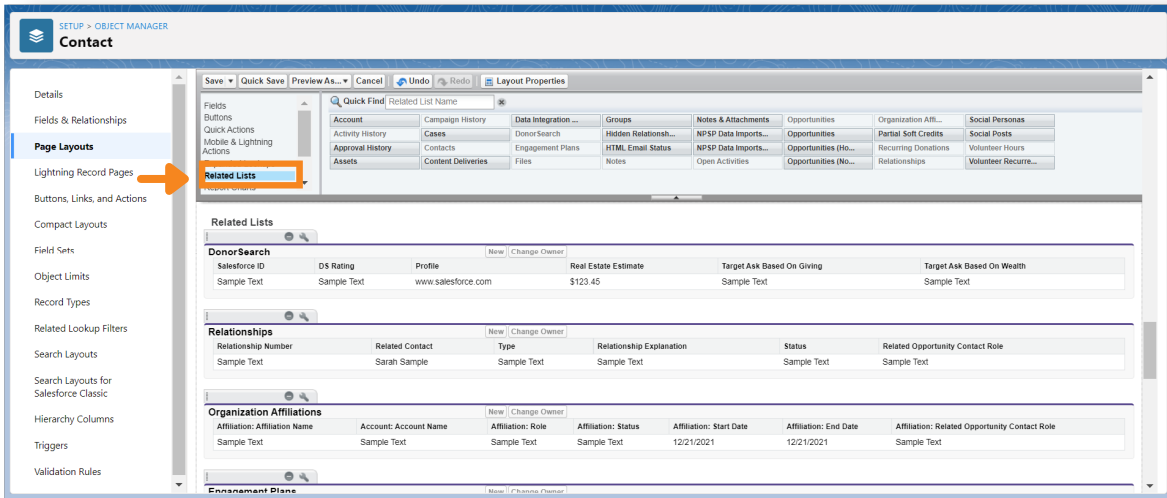


Still in the Object Manager page for the Contact object, navigate to Page Layouts and select the appropriate layout you use (this may be multiple, so you would just repeat the following steps for any additional layouts)

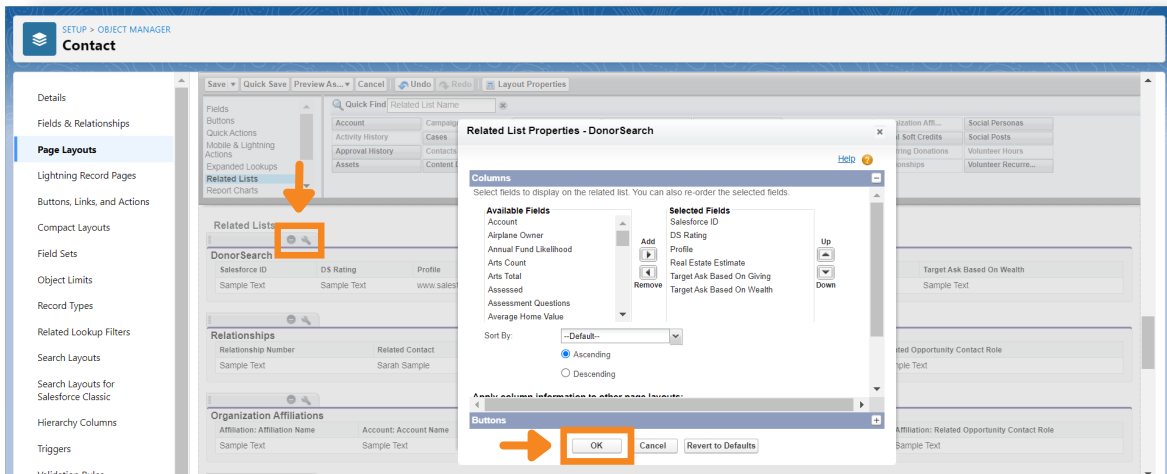
Click Mobile and Lightning Actions. Scroll to the far right and drag and drop the View New DS Profile and Retrieve DS Profile buttons into the page layout



Click Related Lists. Drag and drop the DonorSearch object into the Related Lists Section.

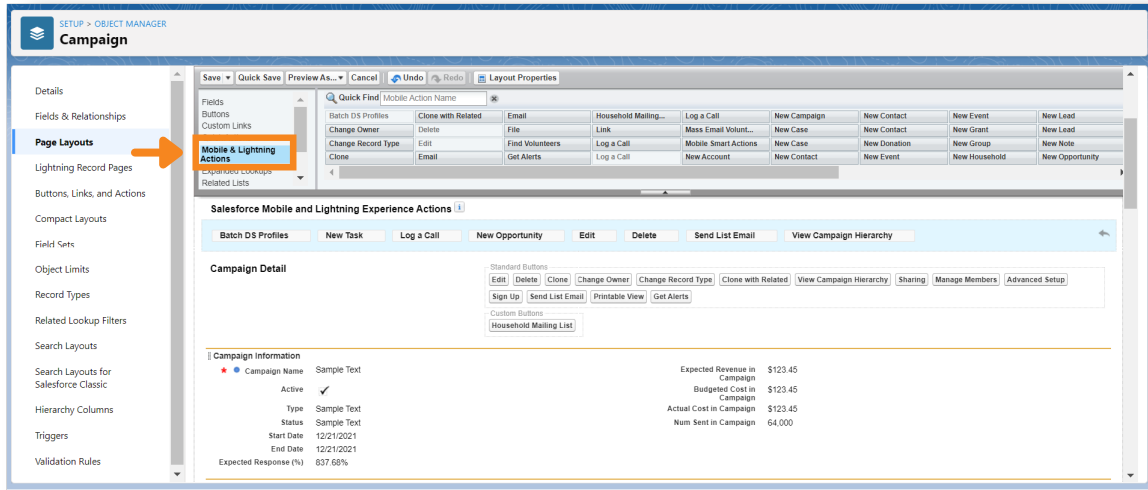


On the DonorSearch object related list, click the wrench and add/remove the preview fields you'd like to be displayed when hovering over the Related List object. Click OK.

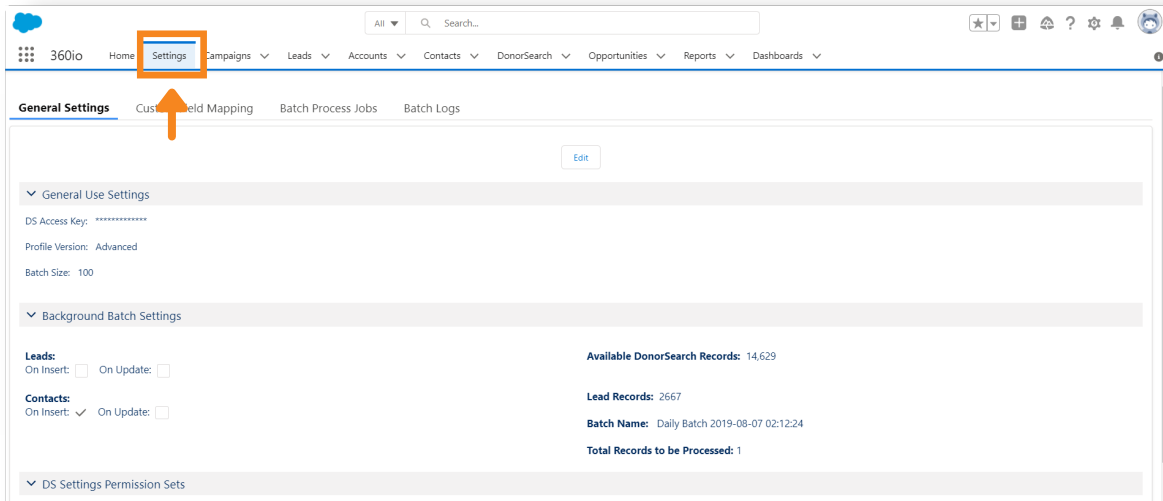


Back in [Object Manager](#), click the [Campaign](#) object

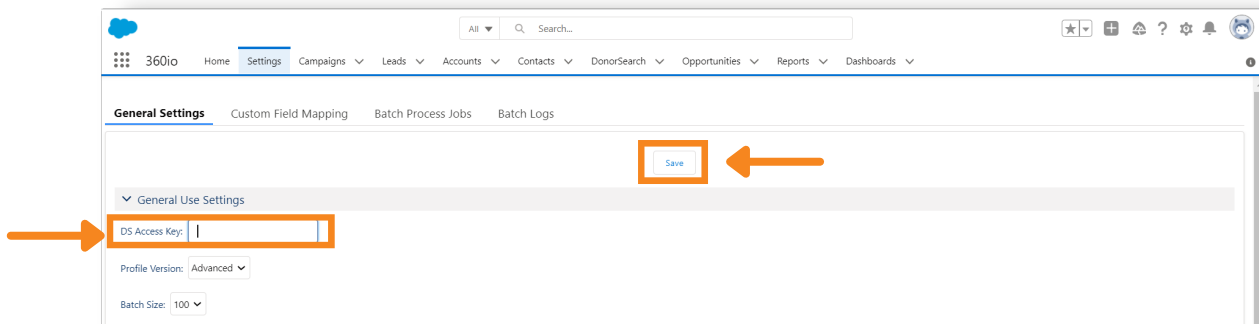
Navigate to [Page Layouts](#) and select the appropriate layout you use (this may be multiple, so you would just repeat the following steps for any additional layouts). Click [Mobile](#) and [Lightning Actions](#). Drag and drop the [Batch DS Profile](#) button into the page layout. Click [Save](#).



Launch the [360io app](#) and navigate to the [Settings](#) tab.



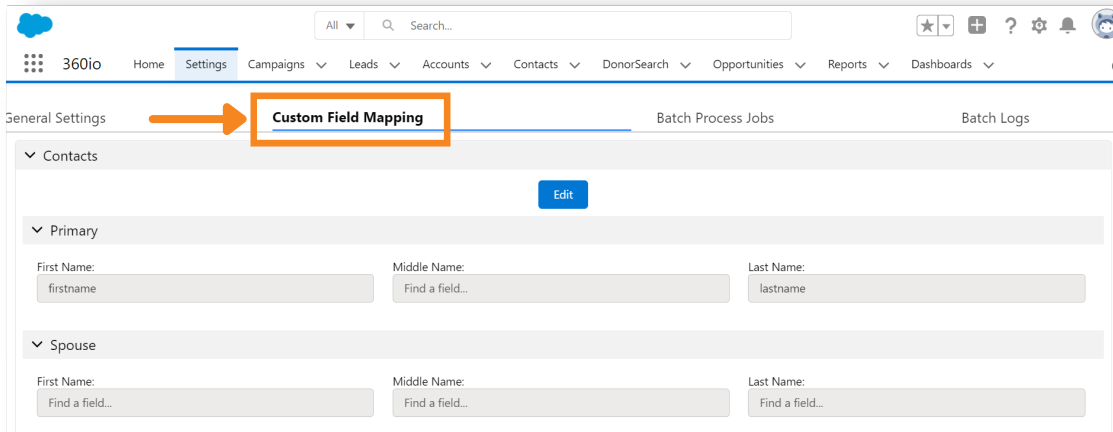
Click [Edit](#), and then click [Edit API Key](#). Enter the API key from your DonorSearch account (directions on where to get API key found in Part 1 of this guide) and click [Save](#).



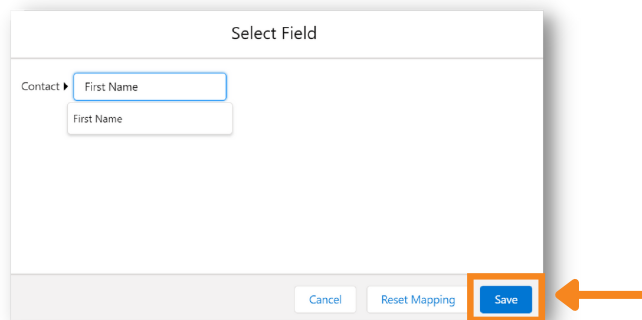
### Part 3: Field Mapping

DonorSearch 360io gives you the unique capability to map fields for prospect screening across objects. Starting with the Contact and/or Lead records, you can map to lookup fields up to four levels up.

To set your custom field mapping, navigate to the [Custom Field Mapping](#) section in the [Settings](#) tab of the 360io app.

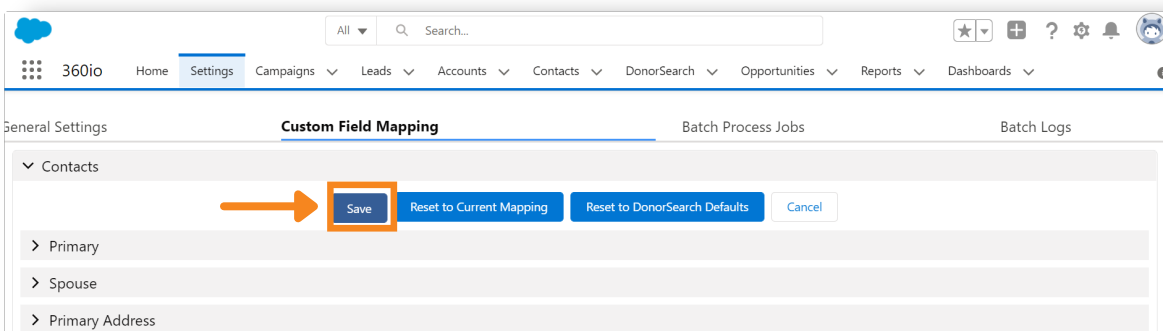


Under the object (Contact or Lead) that you'd like to map fields for, click the [Edit](#) button. Click into the search bar next to the field you'd like to map, and find or search for the appropriate field. Select the field and click [Save](#).



Repeat that step for any additional fields you'd like to map.

If you'd like to use the look-up functionality to map fields across objects, simply search for the object that contains the field you'd like to map to, select, and choose from the next level of fields.



Once you've finished field mapping, make sure to scroll to the top of the tab and click [Save](#).

**Additional Information:**

**For more DonorSearch specific information or DonorSearch training, please contact DonorSearch at: [www.donorsearch.net/contact/](http://www.donorsearch.net/contact/)**

**For more Salesforce information or technical support, please contact your Salesforce Account Executive or Salesforce Support.**