

# DONORSEARCH 360io

## Salesforce Application

### INTEGRATION USER'S MANUAL



DonorSearch's mission is for all nonprofits to make data-informed decisions, so they operate efficiently. Thanks to our partners at Salesforce, we have developed a joint solution that will help you maximize your time and achieve your fundraising goals effectively. This guide will show you how to use our integrated solution to qualify your donors and constituents. It is our aim that with every new gift transaction entered in Salesforce, you have the ability to gain insight into your new donor's capability, inclination and overall potential with the click of a button. By leveraging this integration, you will be able to review, strategize and engage for the potential and significance of your new donor efficiently and proactively.

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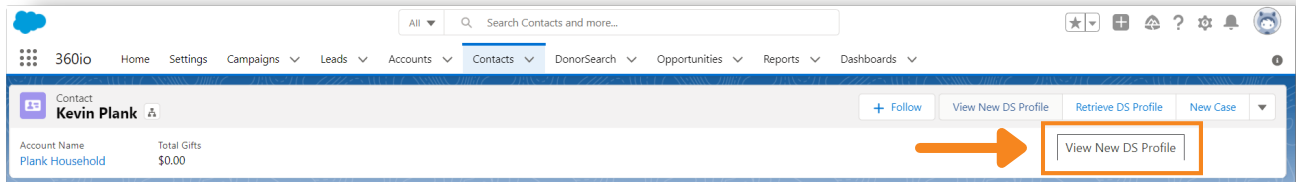
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## Part 1: Viewing and Retrieving a DonorSearch Profile

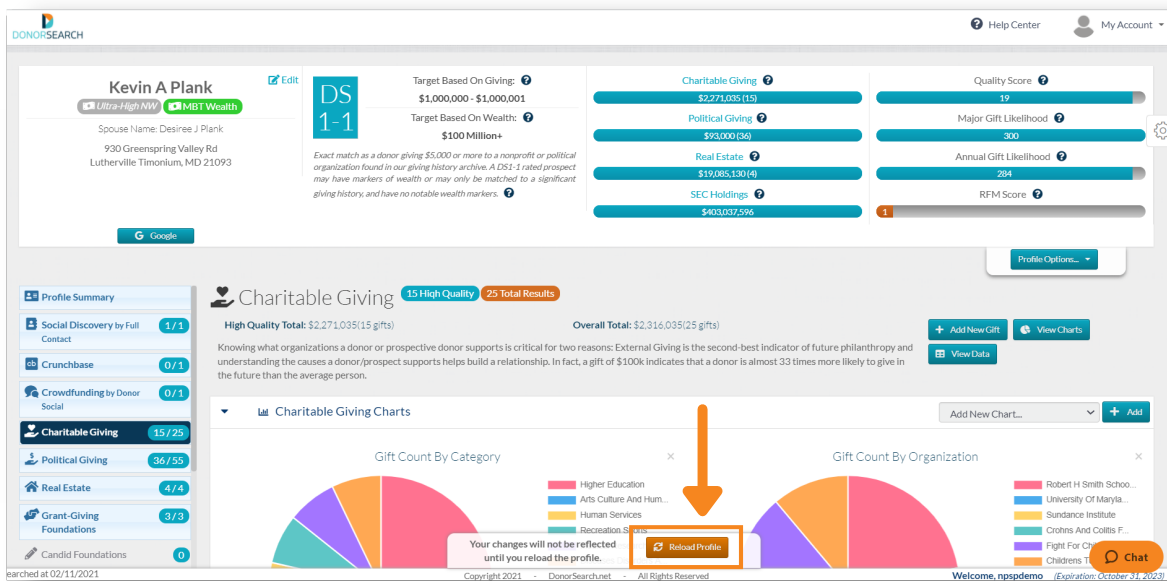
After signing into your Salesforce account, you can view and retrieve prospect data on the individual level. Navigate to a Contact and/or Lead record via the record tab, list view, or search bar and follow the steps below:

On the Contact and/or Lead record page:

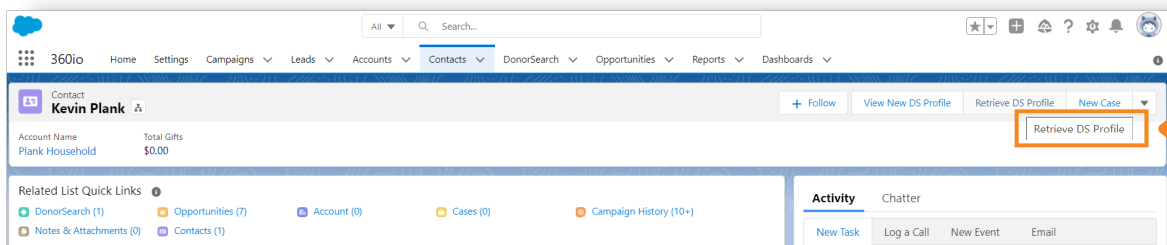
- Click the "View New DS Profile" button. This will open a separate tab of the individual's detailed profile, directly in the DonorSearch retail product.



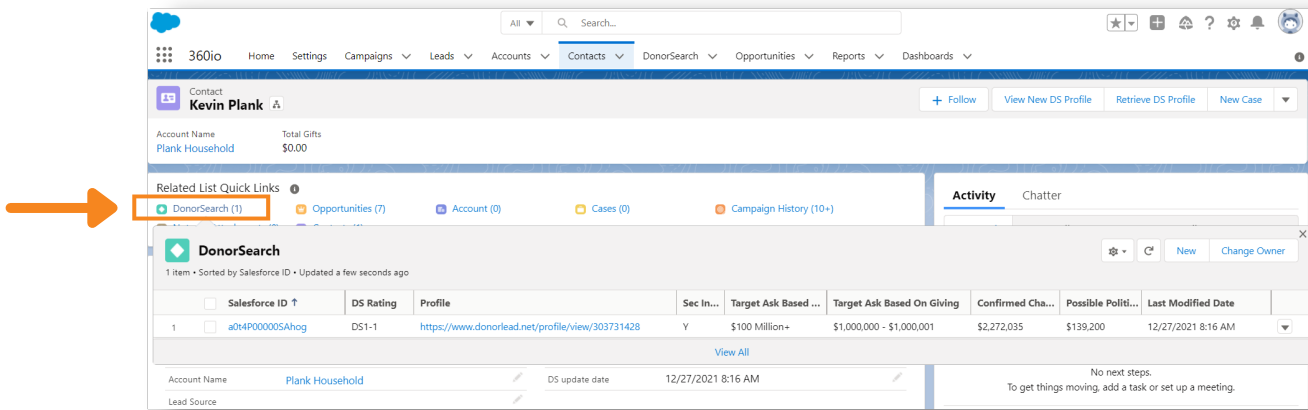
- Here, you can review and edit the full scope of the data included in the detailed profile. If you make any edits in the detailed profile, be sure to click the "Reload Profile" button that appears so your changes are saved.



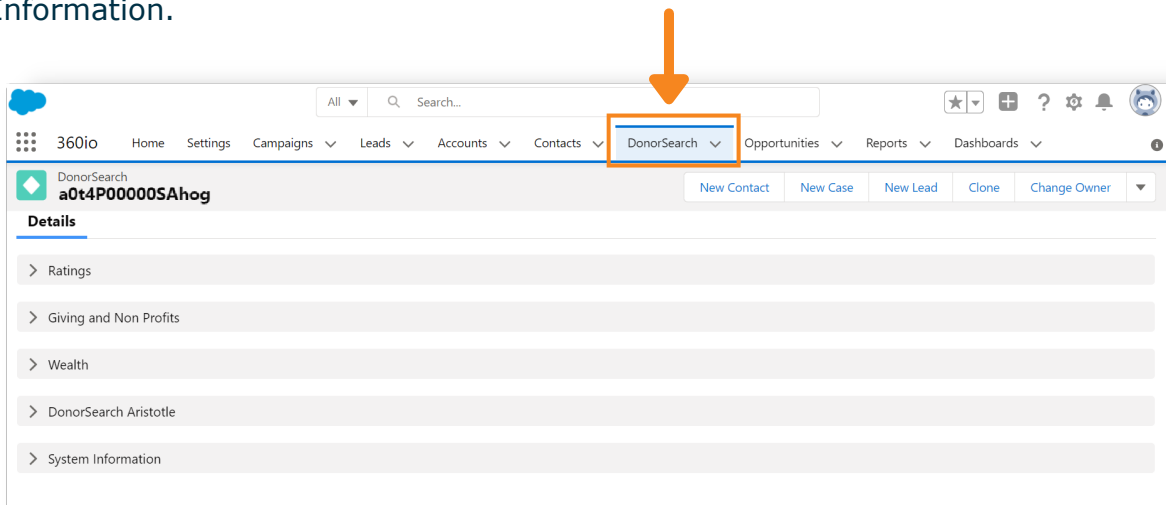
- Back on the record in Salesforce, click the "Retrieve DS Profile" button. This will retrieve the top 67 data points from the individual's detailed profile, and return them via the API to Salesforce.



- Click or hover over the “DonorSearch” related list on the record page. After clicking the “Retrieve DS Profile” button in the previous step, a new DonorSearch record should be populated.



- To view the individual’s data in Salesforce, navigate to the DonorSearch record by clicking the record name, which by default is called “Salesforce ID.” On the DonorSearch record, the data will be organized into five sections-- Ratings, Giving and Non Profits, Wealth, DonorSearch Aristotle, and System Information.



The detailed profile in the retail tool can also be accessed via the link in the “Profile” field of the Ratings section.

Hover over the question mark icons next to the field names to read a definition and explanation of the rating/field.

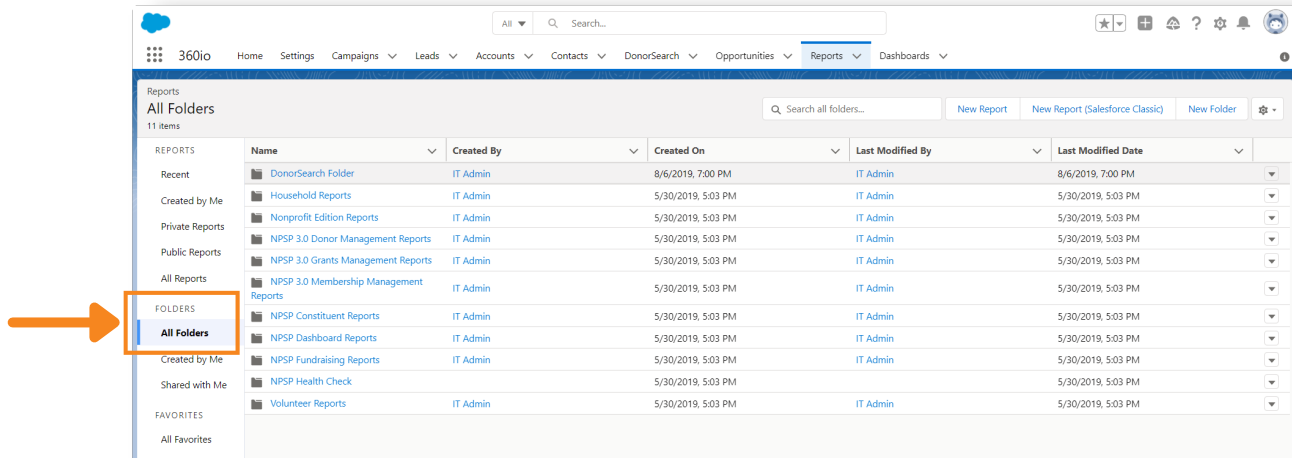
## Part 2: Reporting on DonorSearch Data

To run reports in Salesforce with DonorSearch data, you can use the pre-made DonorSearch reports added in the managed package, or create your own reports from scratch.

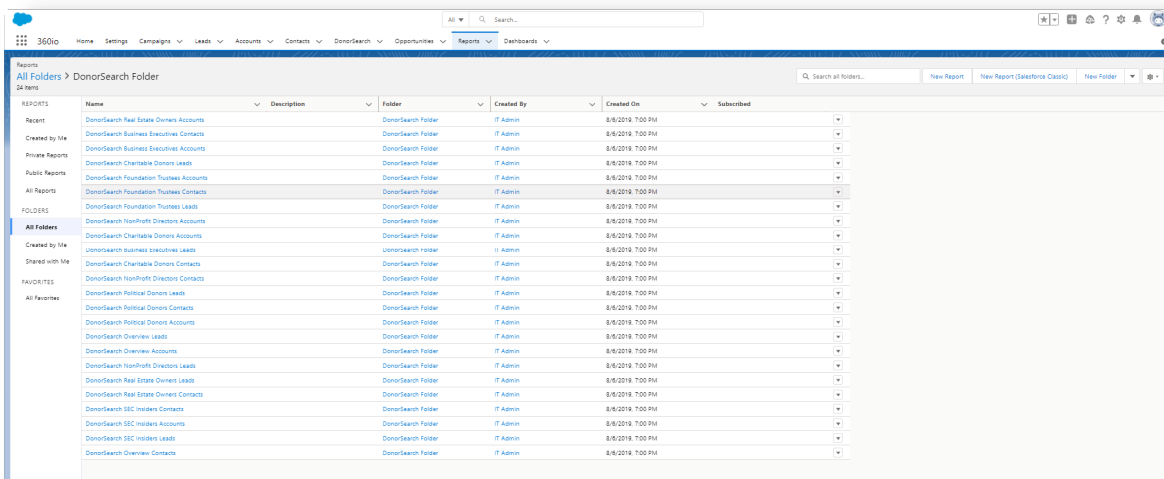
To access the pre-made DonorSearch reports, follow the steps below:

In the Reports tab of your Salesforce instance:

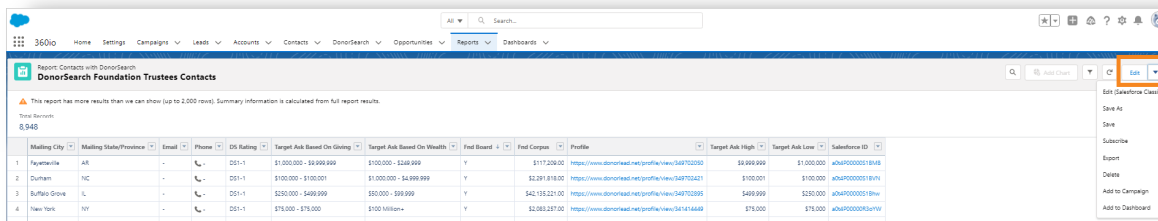
- Under the "Folders" section, navigate to "All Folders"



- Open the folder titled "DonorSearch Folder" and select the report you would like to run (e.g. "DonorSearch Foundation Trustees Contacts")



- Click "Edit" to change the parameters of the report. Click "Save As" to create a copy of the new report if you would like to make changes, but keep the source report as-is.



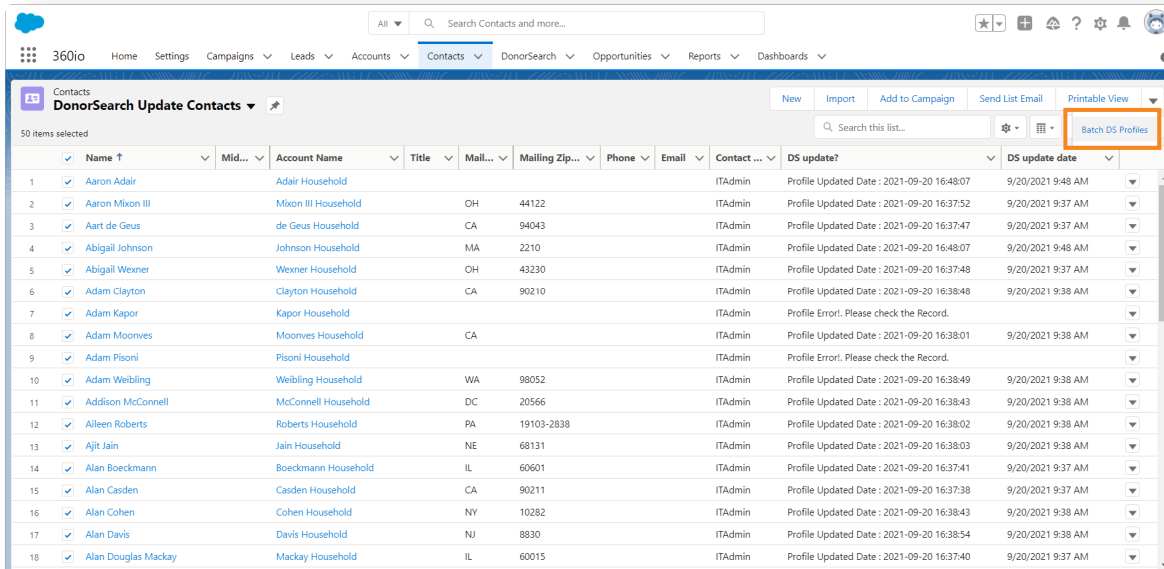
### Part 3: Batch Screening DonorSearch Data

Batch screening on large volumes of Contacts and/or Leads is simple through the 360io integration in Salesforce. Batch screenings can be performed via a List View or a Campaign, and both processes are outlined here. Keep in mind that Salesforce limits users to selecting up to 200 records from a List View, so if you want to run batches larger than 200, we recommend doing so with a Campaign.

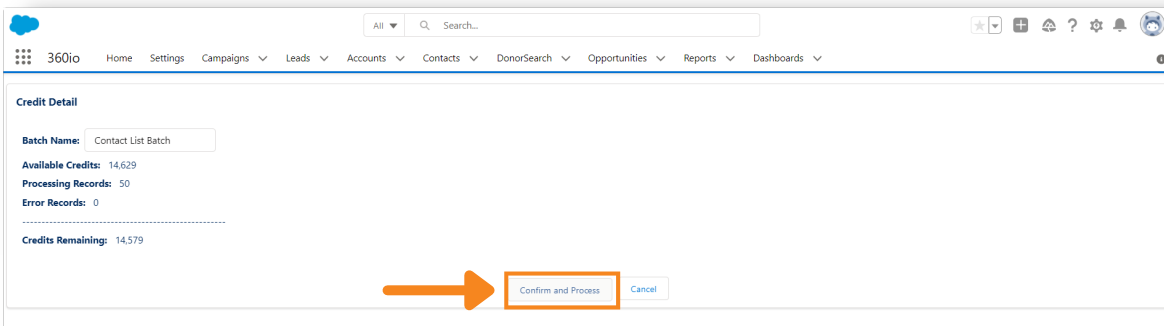
To run a batch screening from a List View, follow the steps below:

On the List View of the Contact and/or Lead record:

- In the List View dropdown, select the List View you would like to run the batch from, or create a new List View under "List View Controls."
- Using the checkboxes, select the individuals you would like to include in the batch. Click the checkbox in the list header to select all.



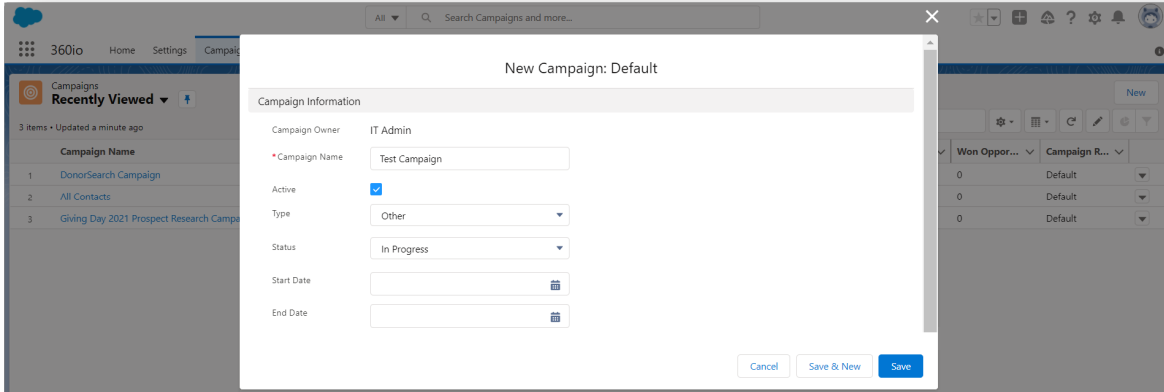
- Click the "Batch DS Profiles" button. Edit the name of the batch as needed, and click the "Confirm and Process" button to run the batch screening.



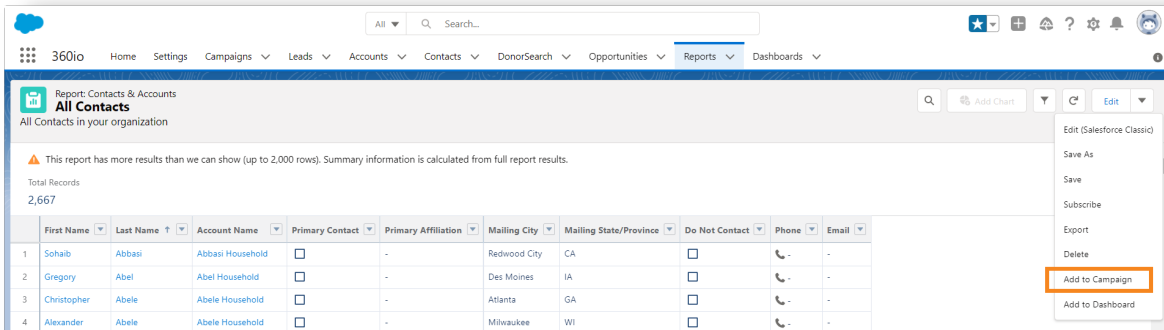
- Batches typically take about 20 minutes to complete, with larger batches taking longer. You will receive an email notification once the batch is complete, and all Contacts/Leads ran in the batch will now have a DonorSearch record associated with their Contact/Lead record with the returned data available for review.

To run a batch from a Campaign, follow the steps below:

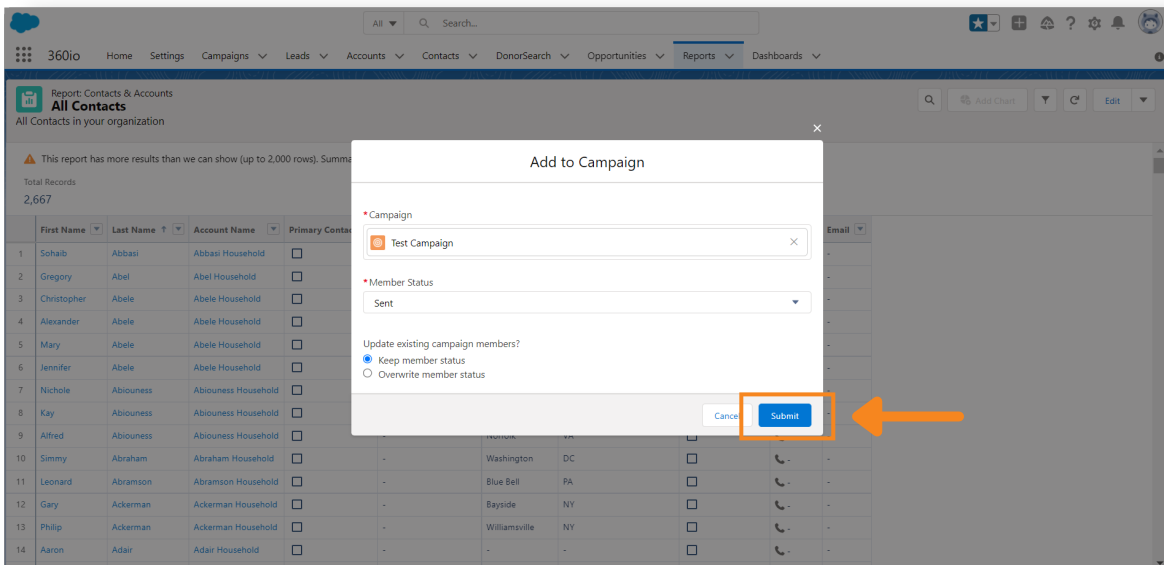
- Navigate to the Campaigns tab in your Salesforce instance. Click the “New” button to create and name your new campaign. If you have an existing campaign that you want to add members to, skip to the next step.



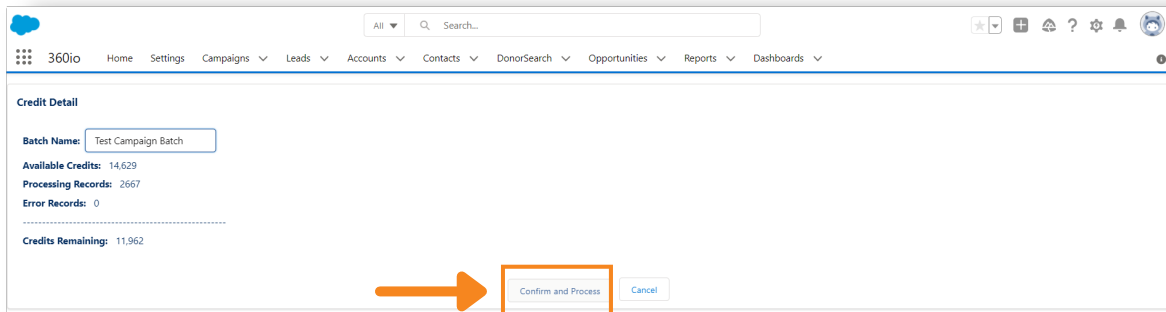
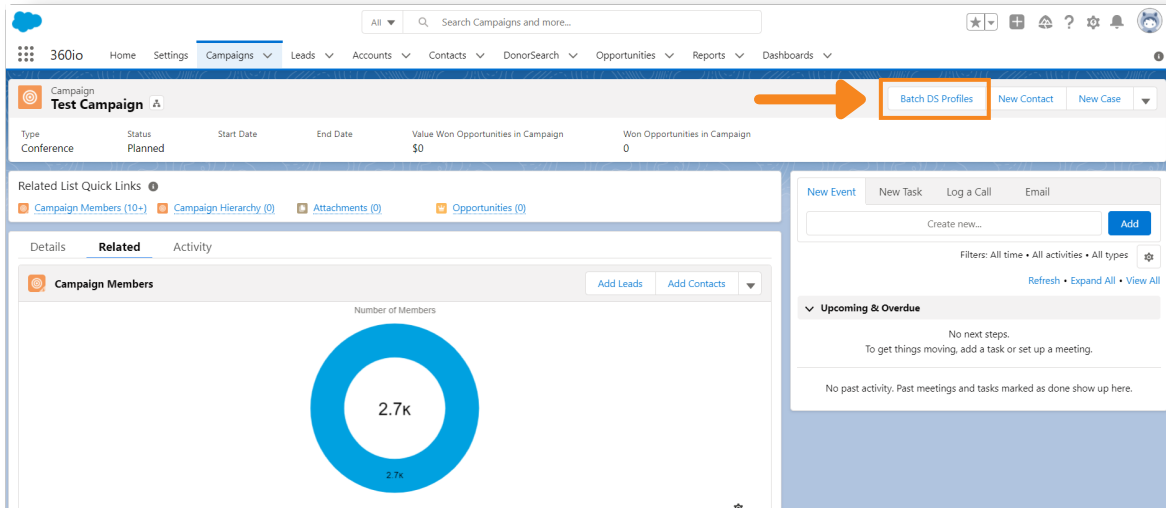
- Navigate to the Reports tab in your Salesforce instance. Create a new report to identify the Contacts and/or Leads you’d like to screen in your campaign or navigate to an existing report you’d like to use. On the report page, click the “Add to Campaign” button.



- Search for and select the campaign you created or identified in the first step. Select the appropriate member status, select your preference for “Update existing campaign members?,” and click “Submit.”



- Navigate to the Campaigns tab and open the campaign you just added those members to. Click the “Batch DS Profiles” button. Edit the name of the batch as needed, and click the “Confirm and Process” button to run the batch screening.



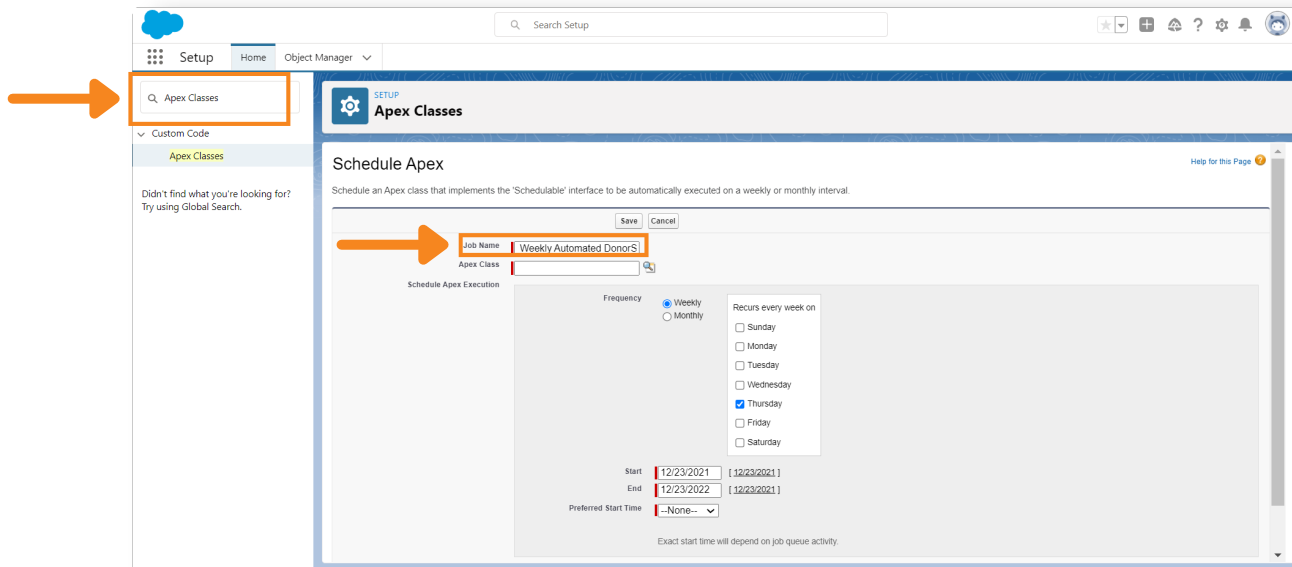
## Part 4: Automation and Workflows Using DonorSearch Data

Use Apex and workflows to automate screening of your Contacts and/or Leads to help with efficiency and productivity.

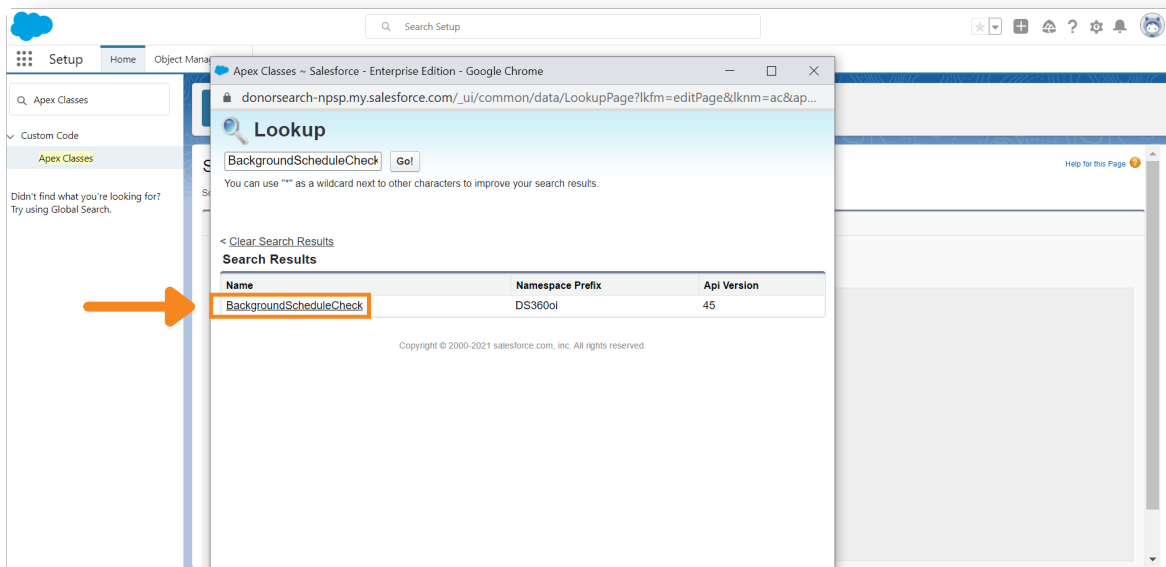
To schedule automated background screenings with Apex, follow the steps below:

Navigate to Setup in your Salesforce instance:

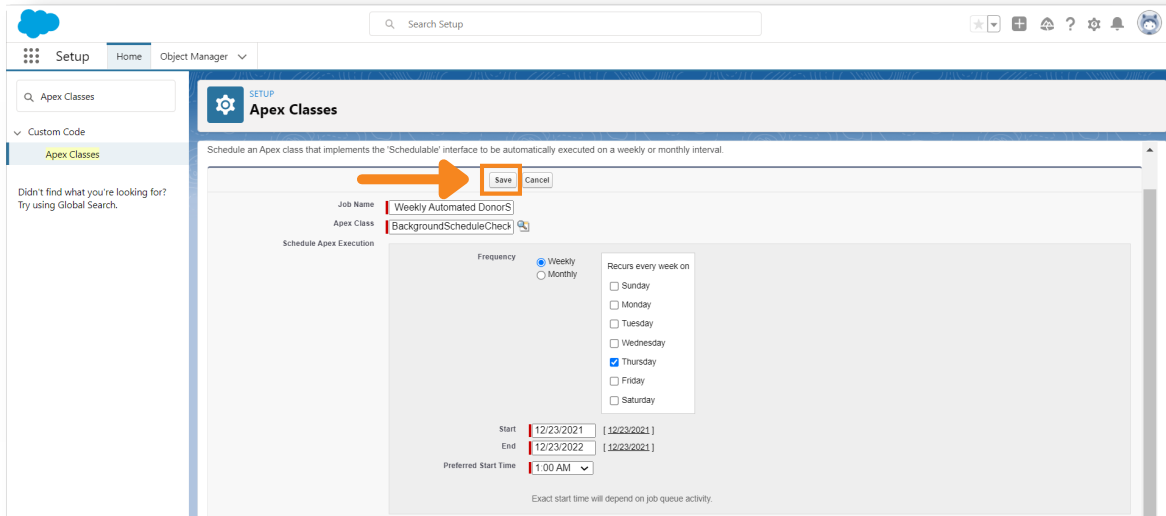
- In the Quick Find search box, type “Apex Classes” and select “Apex Classes.” Click the “Schedule Apex” button. Type your desired job name in the “Job Name” field (e.g. Weekly Automated DonorSearch Screening).



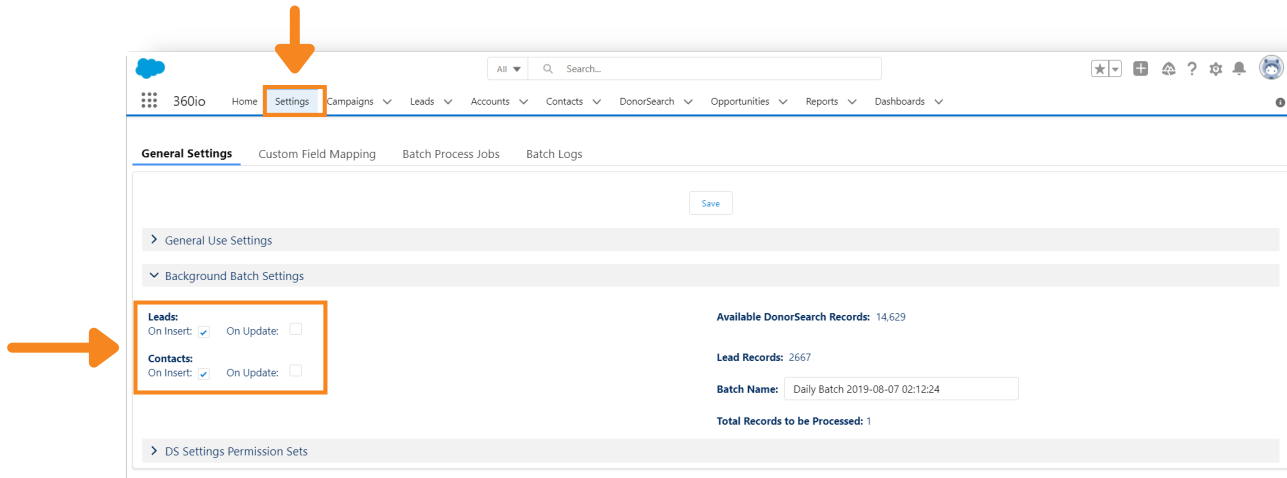
- Click the magnifying glass next to the “Apex Class” field and select the “BackgroundScheduleCheck” class.



- Select the batch frequency, start date, end date, and preferred start time, and click the “Save” button.



- Navigate to the “Settings” tab in the 360io app. In the “General Settings” tab, click the “Edit” button. In the “Background Batch Settings” section, check the “On Insert” and/or “On Update” buttons for the Contact and/or Lead objects. This will determine whether the Apex runs when a record is added to your Salesforce instance, when it is updated, or both.



- Click the “Save” button.

In addition to bringing your donor prospect data into Salesforce with 360io, you can take advantage of native Salesforce functionality to automate screening, create tasks, and assign prospects based on their charitable giving and wealth data. Work with your internal Salesforce Administrator or a System Integrator to implement processes to streamline your prospect development practices!

**Additional Information:**

**Does the 360io app make prospect development easier for your organization?  
Consider leaving your feedback in a review on our listing in the Salesforce  
AppExchange.**

**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.**