

DONORSEARCH 360io

Salesforce Application

UPDATE 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 install the Spring 2022 update of our integrated solution in Salesforce, so you can efficiently gain insight into your new donor's capability, inclination, and overall potential.

In this update:

- Cross-object field mapping
- Addition of help text to define DonorSearch field contents
- Addition of section on DonorSearch custom object for administrative/update data fields
- Addition of DonorSearch Aristotle data points for import capability

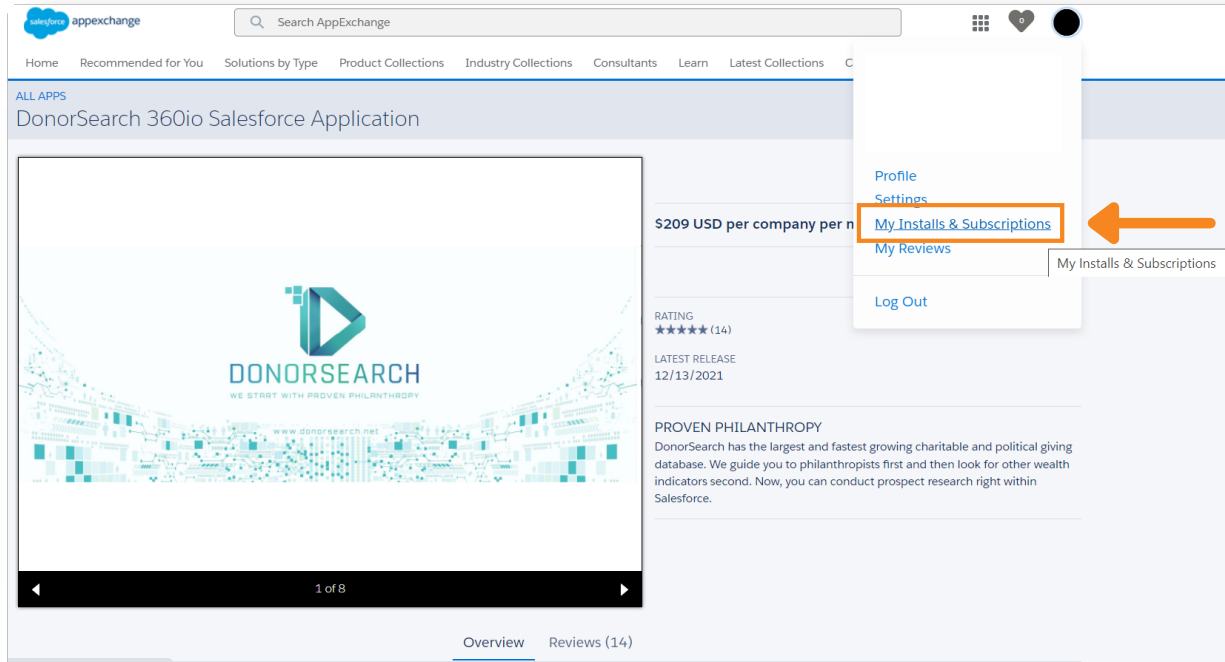
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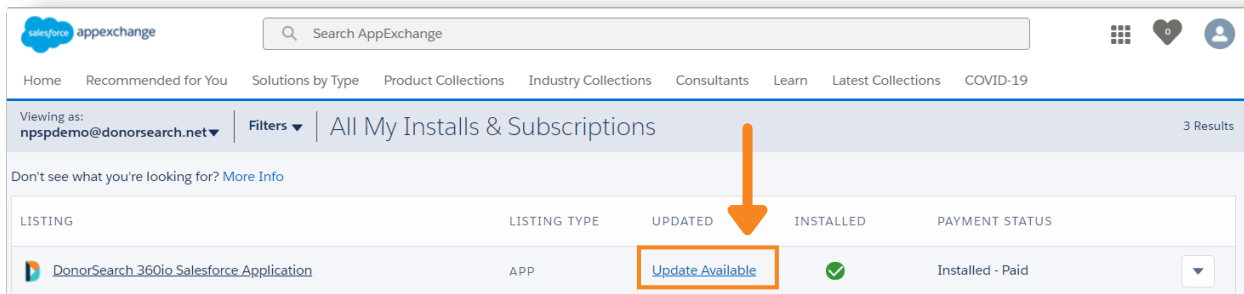
Part 1: Installing the Update

To install the update, complete the following steps:

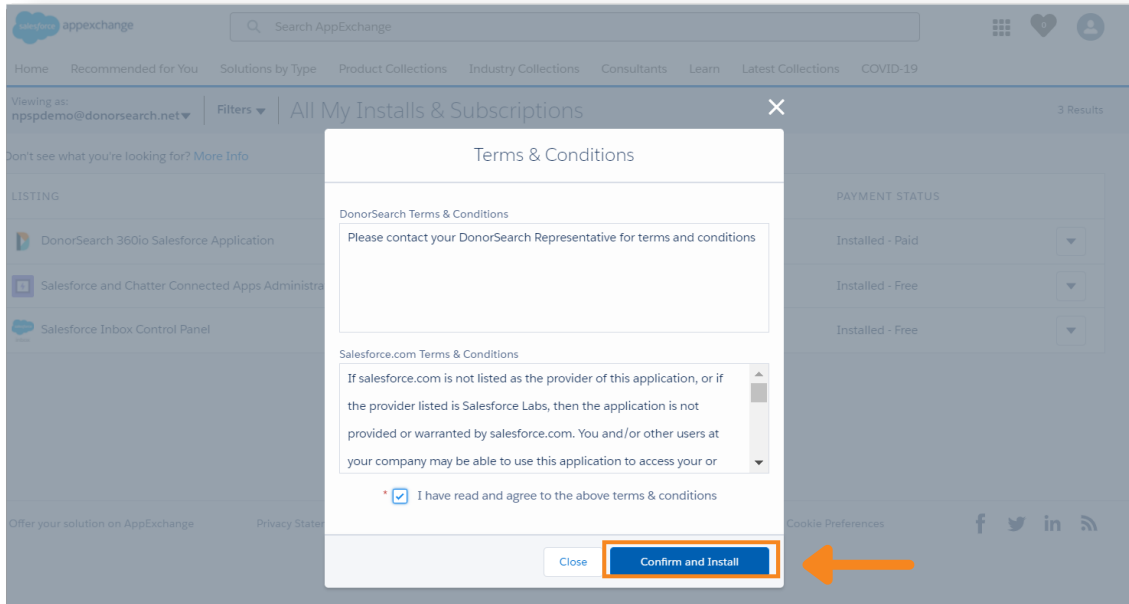
- Log in to the Salesforce AppExchange: <https://appexchange.salesforce.com/>. Once logged in, click on "My Installs and Subscriptions"



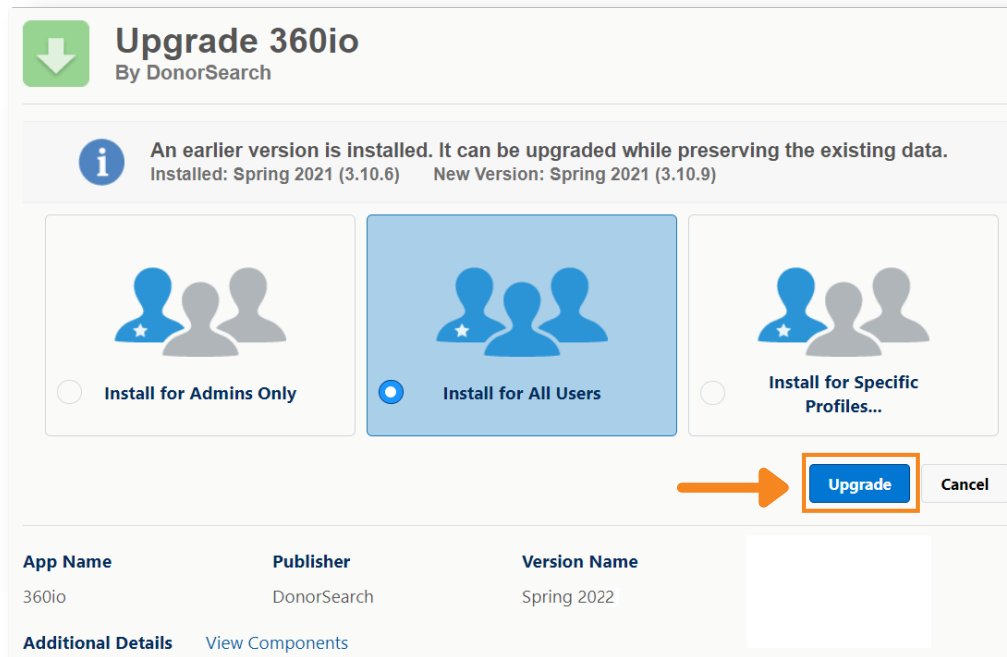
- Next to 360io - DonorSearch App, Click on "Update Available"



- Review and Accept the Terms & Conditions. Then click "Confirm and Install"



- Specify the User Group you wish to install the update for, then click "Upgrade." After the upgrade is complete, click "Done"



Part 2: Accessing Your API Key From DonorSearch

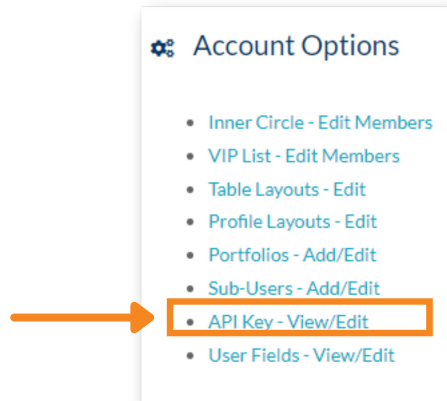
Once you are logged into your DonorSearch account:

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

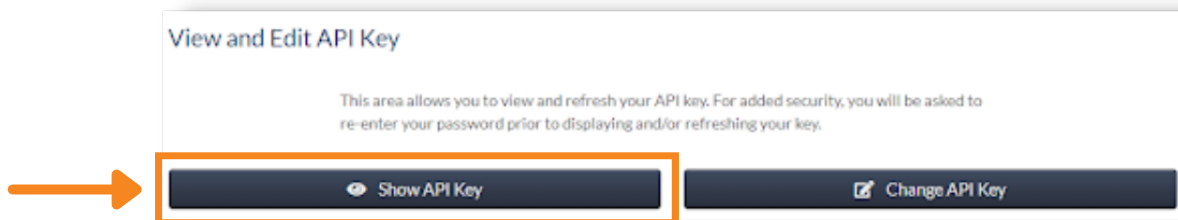
Use same screenshots from Installation Guide (e.g. new higher quality SS I took for this step)

Under Account Options:

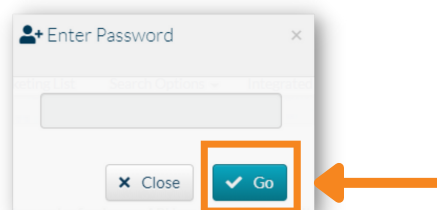
- Click on API Key – View/Edit



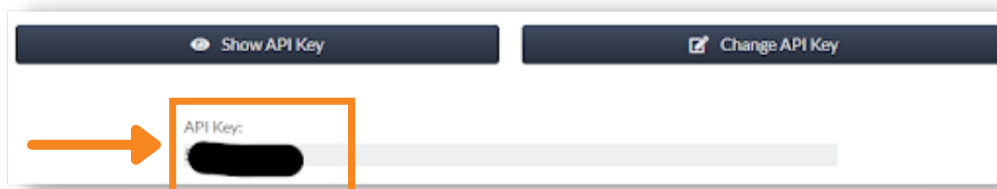
- Click Show API Key



- Enter your password and click Go



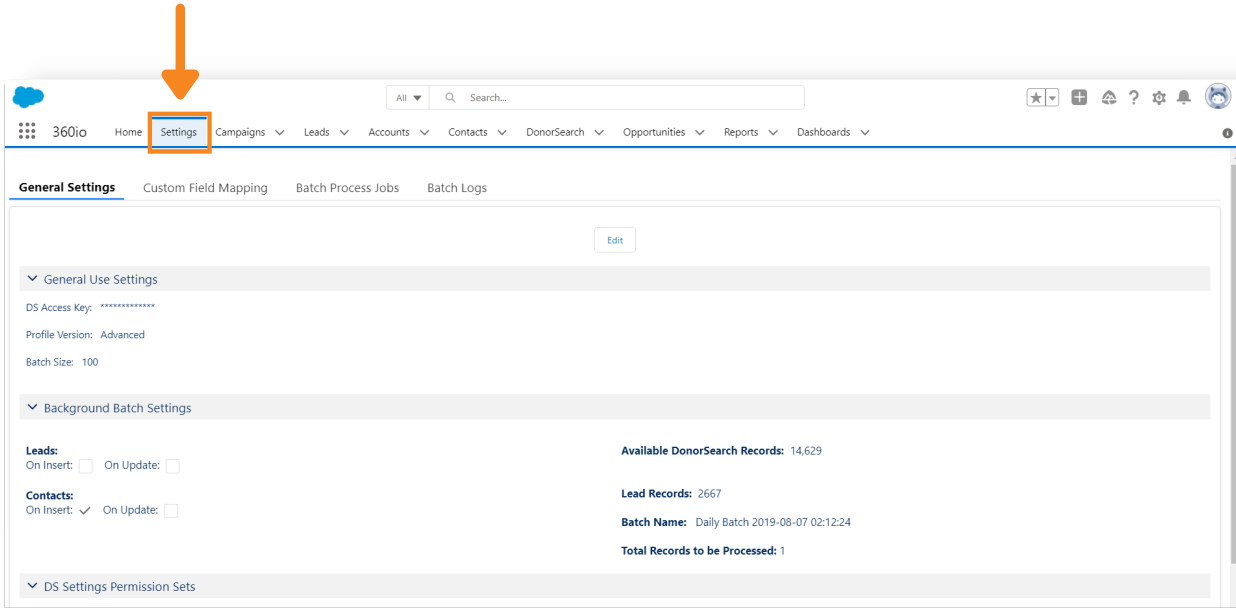
- Your API key will appear



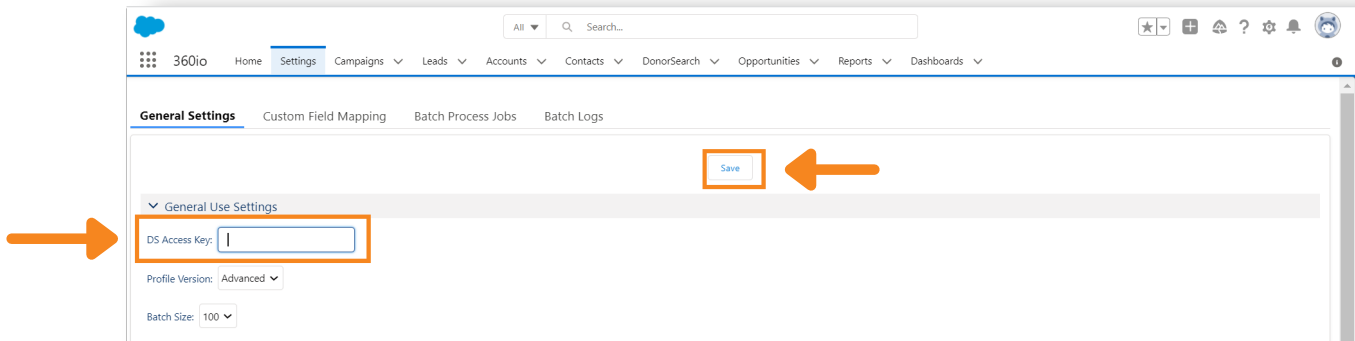
- Copy the API Key to your clipboard.

Part 3: Updating Your API Key in Salesforce

Log into your Salesforce instance that you installed the update in. Launch the [360io app](#) and navigate to the [Settings](#) tab.



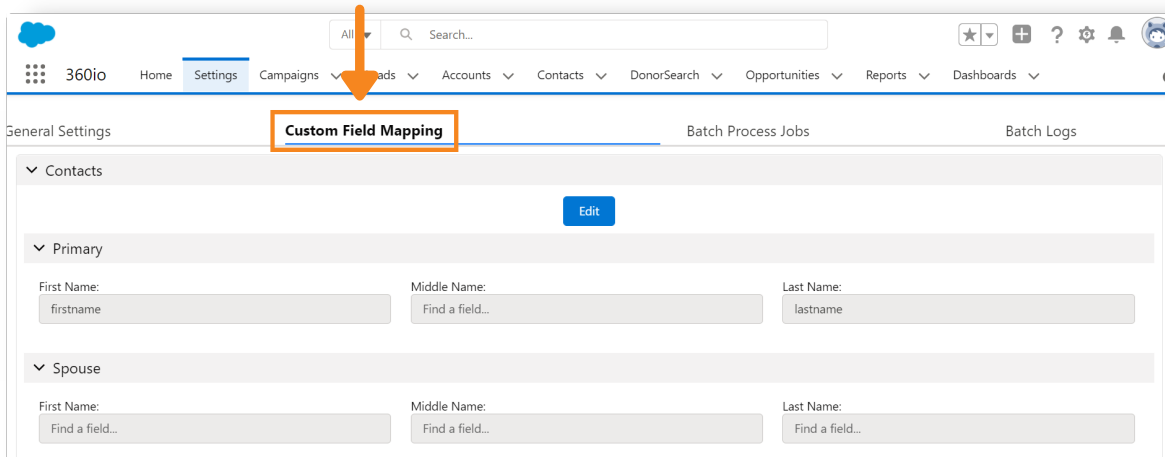
Click [Edit](#), and then click [Edit API Key](#). Enter the API key from your DonorSearch account (directions on where to get API key found in Part 2 of this guide) and click [Save](#).



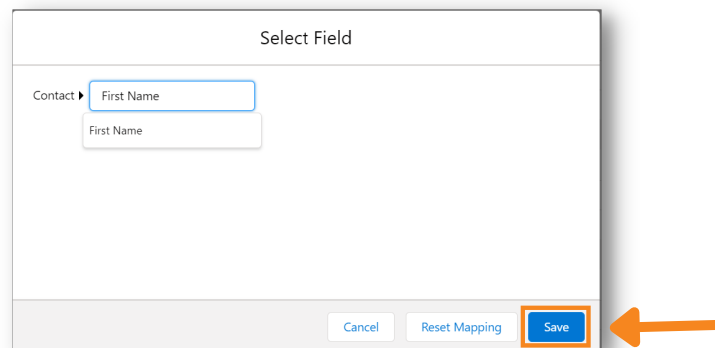
Part 4: Setting Up Your Custom Field Mapping

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 look-up 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.

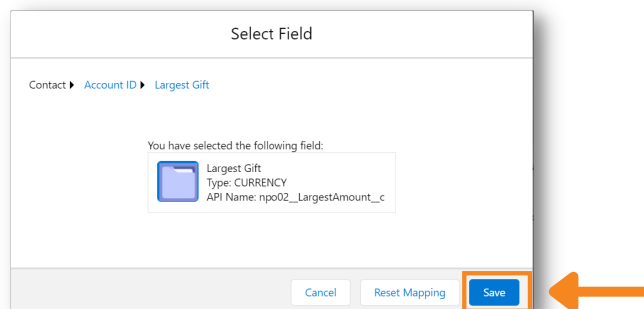


Under the object (Contact or Lead) that you'd like to map fields for, click the [Edit](#) button. Click into the search bar next to the field you'd like to map, and find or search for the appropriate field. Select the field and click [Save](#).



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/

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