

Tiltify Connector

Salesforce Connector Installation & Configuration Guide

Updated: 8/16/2022

CONFIDENTIAL

Table of Contents

[Package Details](#)

[Production Deployment Steps](#)

[Prior to installation:](#)

[Package Installation](#)

[Configuration](#)

[Authentication & Logs Tab](#)

[Setting up Remote Site Setting](#)

[Save and Discard](#)

[Data Import Tab](#)

[Help Text](#)

[Times used in Configuration](#)

[Holding Tank Section](#)

[Importing Tabs](#)

[Object Mapping](#)

[Field Mapping](#)

[Object and Field Level Security](#)

[Temporary objects:](#)

[Additional object:](#)

[Apex Class Access](#)

[Resources](#)

Package Details

The following details are in reference to the Tiltify Salesforce Connector Package:

- **Package Info**
 - **Latest Package Version: Version 1.3**
 - **Version ID: 04t5f000000SHEo**
 - **PRODUCTION Package Installation URL:**
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t5f000000SHJP>
 - **SANDBOX Package Installation URL:**
<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t5f000000SHJP>

Production Deployment Steps

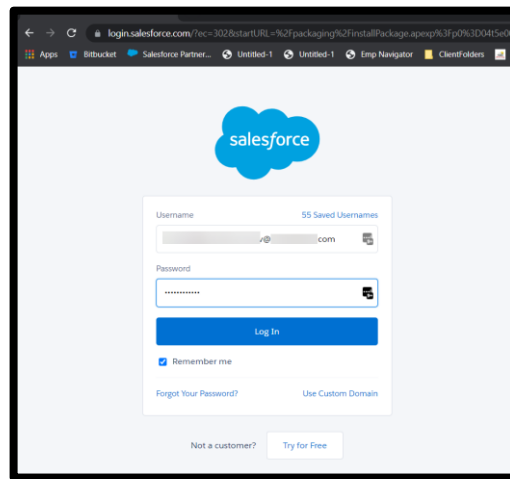
Prior to installation:

The end user will need to log onto the Cause Dashboard and navigate to Integrations, Salesforce to generate a Shared Secret. The needed API URL value is
<https://salesforce.tiltify.com/gql>

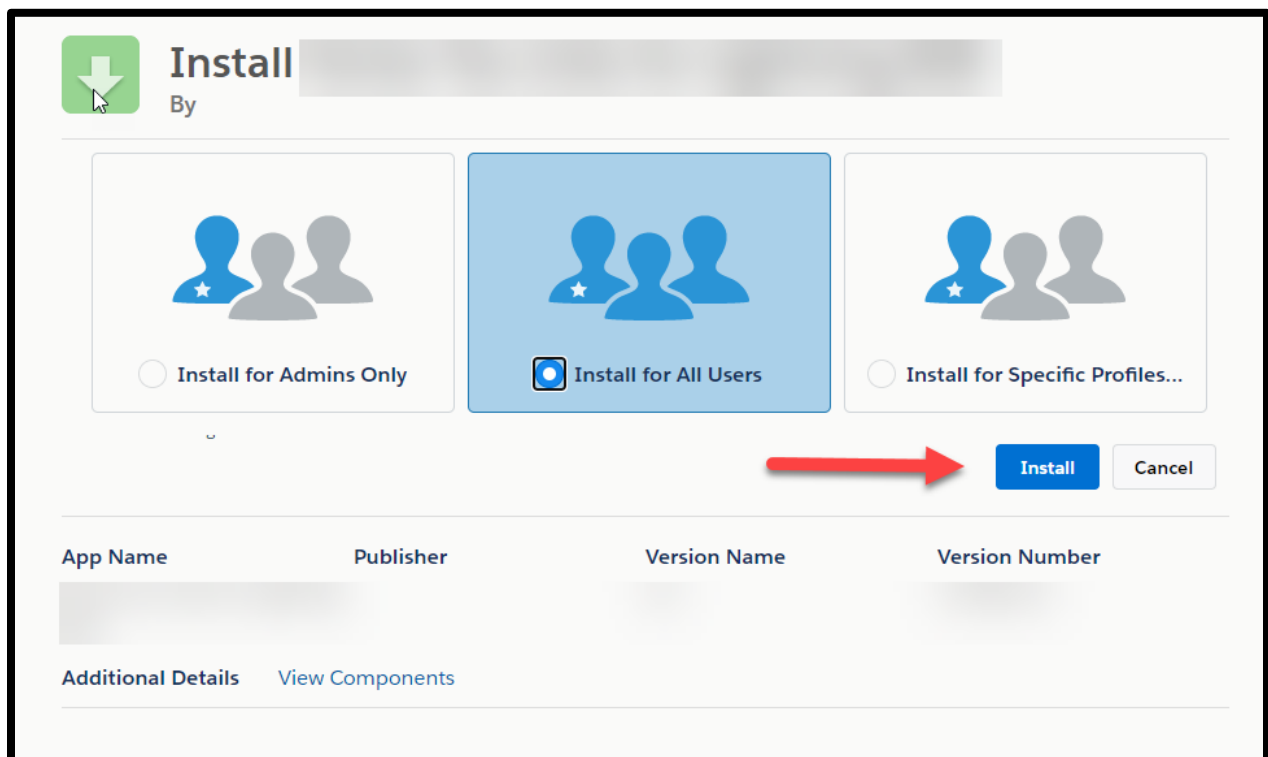
Package Installation

You will need to download the package from the Salesforce Appexchange or from a Tiltify provided link.

1. Using the provided URL you will start the package install.
2. You may get a prompt to Log Into Salesforce Org to install the package if you are not already signed into your instance.
 - a. Best practice is to set up in your Sandbox for testing and training prior to your Production instance.



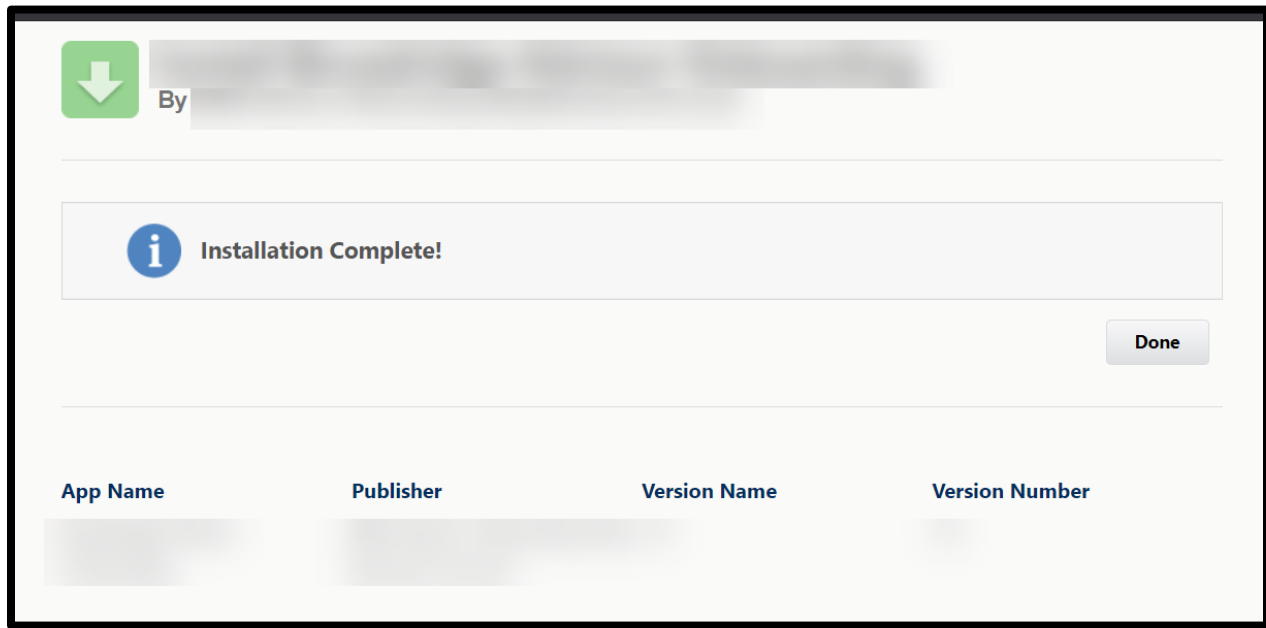
3. Your next screen will allow you to install the package into your Salesforce instance. Implement security as required by your instance and company.



Installation window that appears looks similar to the above.

4. Select the installation security radio button needed and Select the Install button. You will now see the installation and depending on the availability of the network you may get a

notice that an email will be sent when installation is complete or you will receive a message similar to the one below:

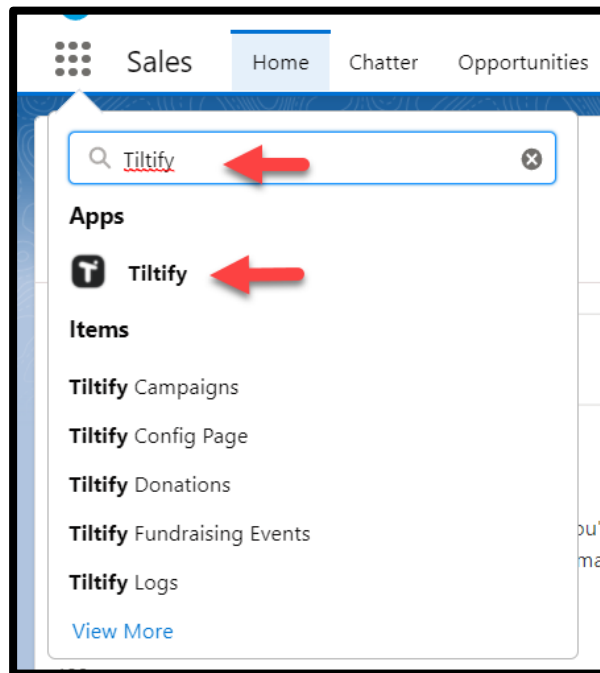


5. Select the Done button to return to your Salesforce instance.

Configuration

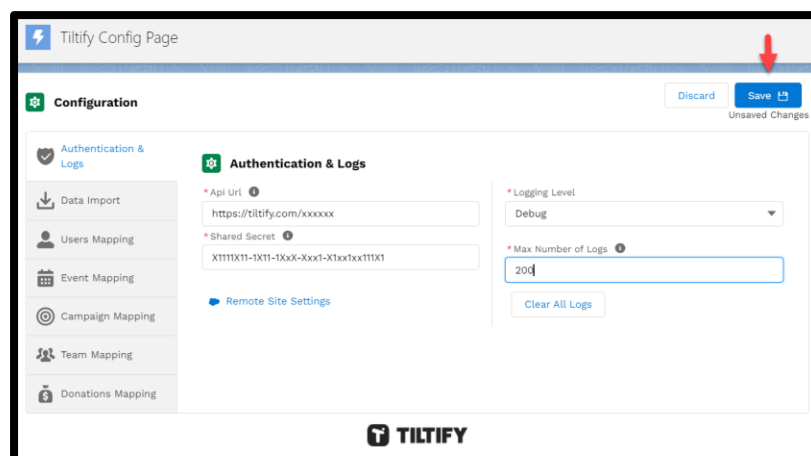
Navigating to the Configuration App for setup of the Managed Package.

1. Select the App Launcher in the left corner of the menu bar.
2. In the Search bar enter "Tiltify"
3. Select the Tiltify App.



Authentication & Logs Tab

1. Using the information provided by Tiltify complete:
 - a. Api Url
 - b. Shared Secret
2. Set following information in the provide fields:
 - a. the Logging Level to the Debug.
 - b. Set the Max Number of Logs to 200.



¹ After successfully setting up and importing records it is possible to set the Logging Level to Error as you gain familiarity with the managed package.

Setting up Remote Site Setting

The remote site setting is a configuration that is set to allow your Salesforce Org to communicate with outside resources.

Select the Remote Site Setting button on the Authentication & Logs tab on the Configuration Page.

1. Select the New Remote Site button to enter the host URL that has been provided by Tiltify. This allows Salesforce to communicate with this particular URL.

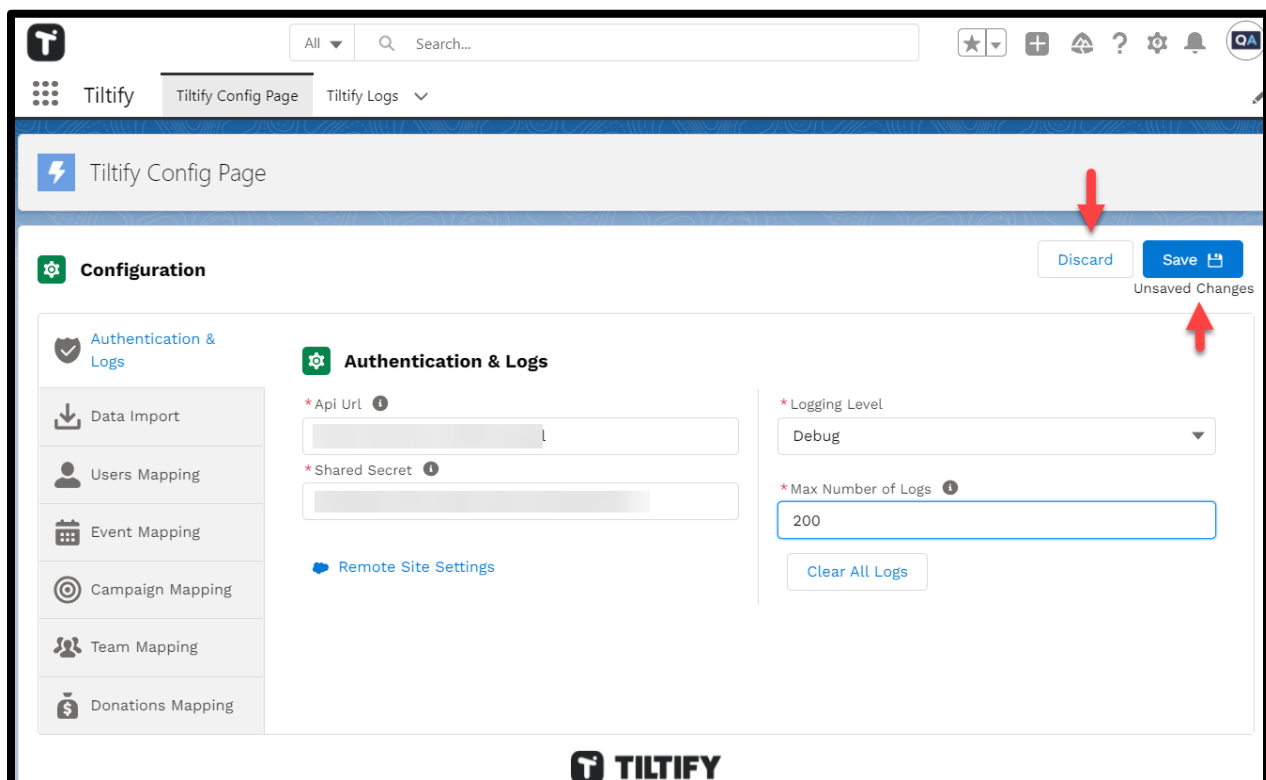
The screenshot shows the 'Remote Site Edit' configuration page in Salesforce. The page has a header with a 'SETUP' icon and the title 'Remote Site Settings'. Below the header, the title 'Remote Site Edit' is displayed, followed by a descriptive text: 'Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.' The main form area is titled 'Remote Site Edit' and contains several fields: 'Remote Site Name' (with a red circle 2), 'Remote Site URL' (with a red circle 3), 'Disable Protocol Security' (checkbox), 'Description' (text area), and 'Active' (checkbox with a red circle 4). At the bottom of the form are 'Save', 'Save & New', and 'Cancel' buttons, with a red circle 5 highlighting the 'Save' button.

2. Enter the Remote Site Name.
3. The host URL.
4. Ensure it is marked active.
5. Select the Save button.

Save and Discard

As you navigate through the Configuration Page you will see a Save Button and a Discard Button at the top of the page.

- The Save button will show a value of unsaved Changes when a change has been made.
- The Discard button will allow you to revert to previous values when selected.



Data Import Tab

The Data Import Tab allows you to set general configurations and view those records that are within your Salesforce Org but being housed in temporary Objects until they are moved to the mapped Objects you will designate in the Mapping Tabs.

1. The Import Now button allows you to import all records immediately.
2. The Enable Import Toggle will allow you to create a scheduled job to import records based on the value just below it in the Scheduled Time field.

3. The Schedule Time field will allow you to schedule your imports at your convenience each day.
4. The Last Import / Import Since will be the date and time that will be used for the next scheduled import (if you enable imports) and can be adjusted as your processes require.
5. The Next Scheduled Import shows when the next run of the Import Schedule is to execute.
6. The Reset to Default Mappings allows a user to set up mappings for all Mapping Tabs to the defaults that were present at installation. This will remove / delete all current mappings.
7. The Clear All Now button will remove / delete all records from any temporary storage objects.

Tiltify Config Page

Configuration

Data Import ? 1 **Import Now** ⬇

2 **Data Import** 3 ☒ **Enable Import**

4 **Schedule the Time the Records will be Imported each day, using org time zone.**

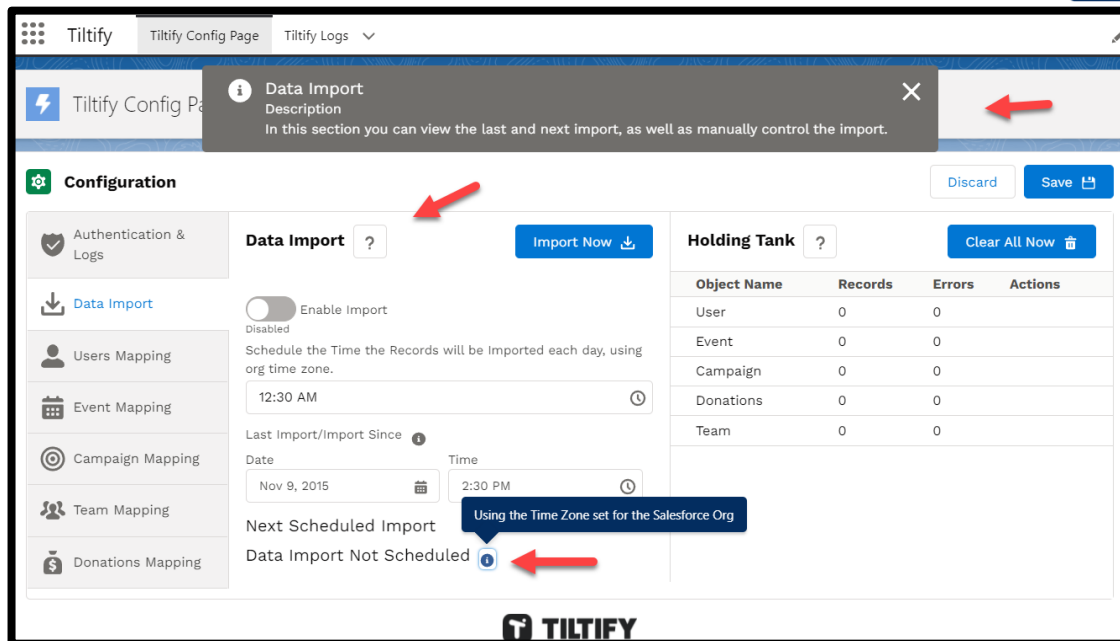
5 **Last Import/Import Since** 6 **Reset to Default Mappings** ↺

Holding Tank ? 7 **Clear All Now** 🗑

Object Name	Records	Errors	Actions
User	0	0	
Event	0	0	
Campaign	0	0	
Donations	0	0	
Team	0	0	

Help Text

In each page section you will see a question mark that can be pressed to provide specific text for that section of each page.



Times used in Configuration

All times in the Configuration are using the time zone of the Salesforce Org and not necessarily of the current user.

Holding Tank Section

This section of the page shows the Salesforce Object that data is temporarily being stored in and any records that created an error and were not imported.

The following is a list of the Object Labels in Salesforce that the corresponding Tiltify Object records are stored in before being inserted into their mapped objects and fields:

Salesforce Object Label	Tiltify Object
Tiltify Campaign	Campaign
Tiltify Donations	Donations
Tiltify Fundraising Events	Fundraising Events
Tiltify Team	Team
Tiltify User	User

If you refresh the Configuration Page during import you will see the Records of the different objects update showing as they progress to import.

Discard

Save

Holding Tank ?

Clear All Now

Object Name	Records	Errors	Actions
User	0	0	
Event	0	0	
Campaign	0	0	
Donations	2800	0	
Team	0	0	

Importing Tabs

There are five importing tabs that correspond to the data that will be imported into your Salesforce instance. Each tab requires that there is a destination for each Tiltify field in the destination object.

When you installed your package, some destination objects and fields were updated for the most probable destination object and fields for most instances. This is completely customizable and can be set as needed in the destination Salesforce instance.

The destination tabs are:

1. Users Mapping
2. Event Mapping
3. Campaign Mapping
4. Team Mapping
5. Donation Mappings

Object Mapping

On the left side of the page is the information concerning the Object to be mapped to:

- A. The Salesforce Object dropdown will show all objects within your Salesforce instance. Select a value from the list.
- B. External Id will be defaulted to the packaged field TiltifyId__c but can be updated as needed. This key will be used to ensure that duplicates are not introduced and that updates to a record are based on this unique value.
- C. Default Record Type is the record type to use for this type of Tiltify record import.
- D. Batch Size is generally set at 200 but can be increased, within the limits of Salesforce or decreased due to other instance requirements.
- E. Create Account Toggle will be available only on the User Tab to allow for the creation of Account Records to associate these records with if you wish to.

Tiltify Config Page

Configuration

Authentication & Logs
Data Import
1 Users Mapping
2 Event Mapping
3 Campaign Mapping
4 Team Mapping
5 Donations Mapping

User Mapping ?

Salesforce Object ⓘ
Contact **A**

External Id ⓘ
TiltifyId__c **B**

Default Record Type ⓘ
User Contact **C**

Batch Size ⓘ
200 **D**

☒ Create Account **E**
Enabled

Field Mapping ?

Tiltify	Salesforce
id	TiltifyId__c
email	Email
first_name	FirstName
last_name	LastName
bio	Description
social	TiltifySocial__c
username	TiltifyUsername__c

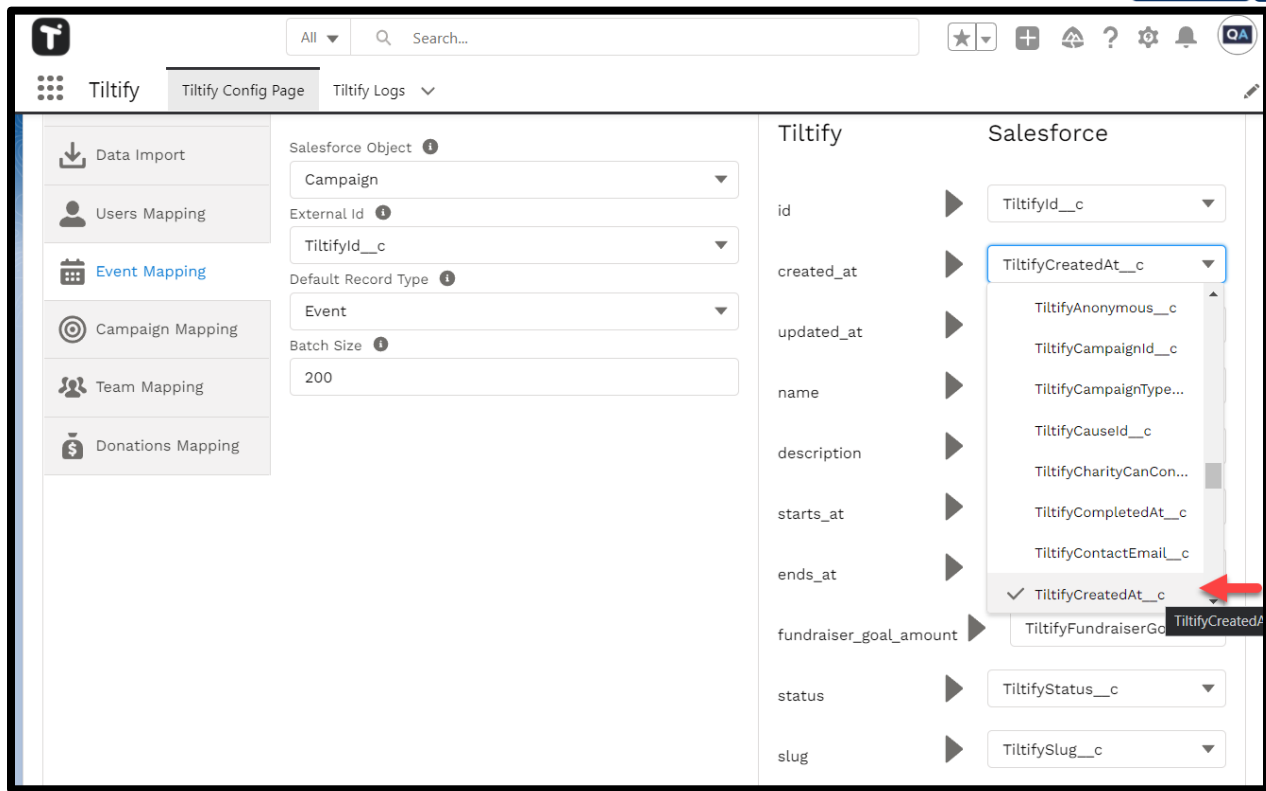
The Object Mapping of each of the five mapping tabs will be the same, with the exception of the Create Account Toggle.

Field Mapping

On the right side of each of the five mapping tabs will be a list of the fields that the Tiltify integration will bring into Salesforce that will need a destination field to write to on the Object that is mapped.

These fields will differ based on the information that is being imported into your Salesforce org. Using existing fields may best follow your firm's business process, consideration should be given to creation of new fields where necessary.

To map these fields select the dropdown list beside the Tiltify field and select the Salesforce Api Name you wish to map values to for import.



Lookup Fields

If you set the Field Mapping to have a Lookup field as the Salesforce field, the app will use the value of the field you are getting from Tiltify as the key to find the external id of the object you are looking up to. With that external id, it will create a relationship with the object that you need to link to. Below are some suggestions for default mappings that you can use to relate your objects.

Here are the fields that can be mapped to standard Salesforce fields:

Tiltify Field	Salesforce Field
Campaign.fundraising_event_id	Campaign.ParentId
Donations.user_id	Opportunity.ContactId
Donations.campaign_id	Opportunity.CampaignId
Fundraising_event.parent_fundraising_event_id	Campaign.ParentId

For some objects, you will have to create custom lookup fields for your two related objects (if these objects don't already have lookup fields to the objects you need in your org):

Tiltify Field	Salesforce Field
Campaign.user_id	Campaign.Contact__c (Custom Lookup Field to Contact Object)
Campaign.team_id	Campaign.Team__c (Custom Lookup field to Campaign Object)
Donations.fundraising_event_id	Opportunity.FundraisingEventId__c (Custom Lookup Field to Campaign Object)

Object and Field Level Security

The end user that is setting up the Scheduled Import Job will need the object permissions on the temporary objects, destination objects and destination fields.

Temporary objects:

- Tiltify__TiltifyCampaign__c
- Tiltify__TiltifyDonations__c
- Tiltify__TiltifyFundraisingEvents__c
- Tiltify__TiltifyTeam__c
- Tiltify__TiltifyUser__c

Additional object:

- Tiltify__TiltifyLog__c

Apex Class Access

When setting up access to the Apex Classes to setup and run the application the user that is performing the setup will need access to the following Apex classes:

- Tiltify__MockHttpResponseGenerator
- Tiltify__TiltifyAppConfigMappingCntrl

- Tiltify__TiltifyCalloutQueueable
- Tiltify__TiltifyConfigController
- Tiltify__TiltifyConfigControllerTest
- Tiltify__TiltifyCore
- Tiltify__TiltifyCoreTest
- Tiltify__TiltifyCoreValues
- Tiltify__TiltifyDataSyncController
- Tiltify__TiltifyFLSCheck
- Tiltify__TiltifyFLSCheckTest
- Tiltify__TiltifyIntegration
- Tiltify__TiltifyLogEventTest
- Tiltify__TiltifyLogging
- Tiltify__TiltifyLoggingTest
- Tiltify__TiltifyMigrationBatch
- Tiltify__TiltifyParsingEngine
- Tiltify__TiltifyStructure

Tiltify Data Structure:

Overview of Tiltify Objects that can be imported into Salesforce.com. For each object we have included the name of the fields that are available to map and the Holding Tank object's data type for each field attribute.

Users – Tiltify Users are Fundraisers and Donors. To donate on the Tiltify platform a donor is only required to provide an email address.

Field Name	Data Type	Description
ID	Text(255) (External ID)	The Tiltify ID of the User
Email	Text(255)	The email address of the User
First Name	Text(255)	The first name of the User
Last Name	Text(255)	The last name of the User
Bio	Text Area(255)	The bio that the User entered
Social	Text Area(255)	The social channels of the User
Username	Text(255)	The username of the User
Slug	Text(255)	The slug can be used to get to the Tiltify webpage for the User
Deleted At	Date/Time	The date the User data was deleted
Create At	Date/Time	The date the User data was created

Updated At	Date/Time	The date the User data was updated
------------	-----------	------------------------------------

Events – Events are known as Fundraising Event Activations on Tiltify. Each Fundraising Event Activation has a Parent Fundraising Event. The Parent FE groups Fundraising Event Activations. The most common use of this is when a Cause has an annual event and wants to keep the same URL year over year. By using the URL of the Parent FE, the URL will always route the user to the active Fundraising Event Activation.

Field Name	Data Type	Description
ID	Text(255) (External ID)	The Tiltify ID of a Causes Fundraising Event
Created At	Date/Time	The date/time the Fundraising Event was Updated
Updated At	Date/Time	The date/time the Fundraising Event was Created
Name	Text(255)	The Name of the Fundraising Event
Starts At	Date/Time	The date the Fundraising Event Starts
Ends At	Date/Time	The date the Fundraising Event Ends
Fundraiser Goal Amount	Currency(16, 2)	The amount the Cause would like to raise with the Fund
Status	Text(255)	The current status of the Fundraising Event
Slug	Text(255)	The slug can be used to get to the Tiltify webpage for t
Short Description	Text(255)	A short description that the Cause entered for the Func
Contact email	Email	The contact email address provided by the Cause for t
Parent Fundraising Event ID	Text(255)	The ID for the Parent Fundraising Event
Parent Fundraising Event Name	Text(255)	The Name for the Parent Fundraising Event
Parent Fundraising Event Slug	Text(255)	The slug can be used to get to the Tiltify webpage for t Event

Campaigns – Campaigns are created by Fundraisers. A Campaign can support a Cause and/or a Cause Fundraising Event

Field Name	Data Type	Description
ID	Text(255) (External ID)	The Tiltify ID of the Campaign
Name	Text(80)	The Name of the Campaign
Description	Long Text Area(32000)	The Description of the Campaign
Starts At	Date/Time	The date the Campaign Starts
Ends At	Date/Time	The date the Campaign Ends

Cause ID	Text(255)	The Cause ID that the will received the donations raised by t Campaign
Fundraiser Goal Amount	Currency(16, 2)	The current fundraising goal of the campaign
Team ID	Text(255)	The ID of the team that the campaign is supporting
User ID	Text(255)	The ID of the user who created the campagin
Slug	Text(255)	The slug can be used to get to the Tiltify webpage for the Ca
Original Fundraising Goal	Currency(16, 2)	The original fundraising goal of the campaign
Region ID	Text(255)	The ID of the region that the fundraiser wants to support
Region Code	Text(255)	The Code of the region that the fundraiser wants to support
Region Name	Text(255)	The Name of the region that the fundraiser wants to support
Published At	Date/Time	The date the campaign was published
Campaign Type	Text(255)	The campaine type/template that was used to create the ca
Retired At	Date/Time	The date the campaign was retired
Deleted At	Date/Time	The date the campaign was deleted

Teams – Fundraiser can opt to fundraise as part of a team or fundraise to support a team

Field Name	Data Type	Description
ID	Text(255) (External ID)	The Tiltify ID of the Team
Name	Text(255)	The Name of the Team
Created At	Date/Time	The date the Team was created
Updated At	Date/Time	The last date the Team was updated
Slug	Text(255)	The slug can be used to get to the Tiltify webpage for the Team
Status	Text(255)	The current status of the Team

Donations

Field Name	Data Type	Description
ID	Text(255) (External ID)	The Tiltify ID of the Donation
Email	Email	The email that was provided by the donor
Amount	Currency(16, 2)	The amount of the donation
Created At	Date/Time	The date/time the donation record was created
Updated At	Date/Time	The most recent date/time the donation record was updated
Payment Status	Text(255)	The current status of the donation

Donor Name	Text(255)	The username the donor provided (if any) when making the d
Donor Comment	Text(255)	The comment the donor provided (if any) when making the d
Anonymous	Checkbox	Whether or not the donation should be anonymous
Donation Payment Type	Text(255)	The Payment processor used to process the donation
Public	Checkbox	Indicator on if the donation was processed as a donation visi campaign
Transaction ID	Text(255)	The transaction ID of the payment processor
Charity Can Contact	Checkbox	Boolean noting if the donor has opted into being contacted
Completed At	Date/Time	Date the donation was completed
User ID	Text(255)	The user ID (if exists) of the donor
Fundraising Event ID	Text(255)	The ID of the Fundraising Event the donation was supporting
Moderated At	Date/Time	The date/time the donation was moderated
Moderated ID	Text(255)	The ID of the User who moderated the donation
Campaign ID	Text(255)	The ID od the Campaign the donation was supporting
Platform ID	Text(255)	Will note if the donation originated from Twitch
Geolocation	Geolocation	The lat and long of the donor as determined by their IP Addre

Resources

[Trailhead Data Security](#)

[Trailhead Data Security - Control Access to Fields](#)

[Trailhead Lightning App Builder - Work with Custom Lightning Components](#)

[Trailhead Lightning Experience Customization - Customize Record Details with Page Layouts](#)

[Trailhead Lightning Experience Customization - Create and Customize List Views](#)