Importing GiveSmart Fundraise Data into Salesforce

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Connecting your GiveSmart Fundraise account to your Salesforce system will allow you to map your GiveSmart Fundraise data from any of your forms to Salesforce data objects. You will be able to create and update records as needed with daily data imports.

To take advantage of your GiveSmart Fundraise and Salesforce integration you will need to:

Connect to Salesforce with your GiveSmart Fundraise API private key

1. To learn how to generate and retrieve your private key, click here.
2. Install the GiveSmart Fundraise App from the Salesforce Marketplace
3. In the settings of the GiveSmart Fundraise app, add:
    - MC Account (your email address)
    - API Token (from step 1)
    - Click Save

Map your GiveSmart Fundraise form field to Salesforce objects

You can do this for all of your forms or for specific forms/activities. Within Salesforce on the GiveSmart Fundraise tab:

1. Click Configure Custom Mappings
2. Select the Account (if you have multiple accounts set up)
3. Under Form Name, select the form you wish to look up.
    - There is also the Global form to retrieve the data from all your GiveSmart Fundraise forms
2. Click Lookup
3. On the new page, under Object Mapping, select where you want to add the GiveSmart Fundraise data.
    - Such as, do you want the imported information to become a Contact, an Account or an Opportunity?
4. Under Field Mapping, choose the items from GiveSmart Fundraise (the Source Field) and where they should be placed in SalesForce (SFDC Field).
    - Example: Source Field = “City” and SFDC Field = “Billing City”
5. Click Save
6. The way the GiveSmart Fundraise App works is that, daily, it will request the transactions from your GiveSmart Fundraise account.

Manually retrieving information from GiveSmart Fundraise

In Salesforce, on the GiveSmart Fundraise tab,

1. Select a Start and End Date
2. Click Request from API
3. Click Process Transactions

Review the daily import jobs and the import log

Once you are connected you can review the daily import jobs and the import log and review GiveSmart Fundraise transaction details within Salesforce.

1. Click on the GiveSmart Fundraise Transaction Jobs tab
2. You should see different jobs listed, click on one to review it.
3. Under MC Transactions can see details from different transactions by clicking on one of the transactions
    - It will show both the standard fields and the custom fields so you can review the mapping set above.
    - These transactions will, based on the mapping, create or update contacts, accounts, opportunities, etc with all their data within Salesforce.

Support

For help with a GiveSmart Fundraise for Salesforce technical issue, contact our Support team by clicking here.