How do I map my GiveSmart payment form to a Salesforce Campaign?

Last Modified on 01/17/2025 6:53 am PST

You have the Salesforce Integration with GiveSmart Fundraise, and would like to set up your GiveSmart form so that transactions made through that form will sync to a Campaign you've set up in Salesforce. This article details the steps needed to map a form to the Primary Campaign Source on the Salesforce Opportunity.

Step 1: Add a Hidden Form Element

Start by adding a hidden element to your form. To get to your form's configuration, select the Campaign and then the form name. Screenshots **here**.

Once you're editing your form, consider creating a custom section, otherwise, you may open up the Suggested Amounts section, select "Add Form Element", and choose **Hidden**.

Name this element "sf_campaign" and insert the Salesforce Campaign ID as the **Hidden Field Value**.

> **IMPORTANT:** When creating a new hidden element for the Campaign mapping, always name the Reporting Label **sf_campaign** to ensure uniformity across all your forms.

Step 2: Retrieve the Campaign ID in Salesforce

To locate the Campaign ID, visit the Campaign in Salesforce and grab the ID from the URL. If your Campaign is not set up in Salesforce yet, create the campaign in Salesforce first to retrieve the ID.

This ID is an alphanumeric string consisting of ~20 characters.

Insert the Salesforce Campaign ID into the Hidden Field Value. Save your changes.

Here's what that would look like on your form after saving:

Note: If a Hidden Field needs to be edited (e.g. you need to change the Campaign ID). Select the Edit action on the right.

Follow the above steps on any payment form you create in GiveSmart Fundraise.

IMPORTANT: When creating a new hidden element for the Campaign mapping, always name the Reporting Label **sf_campaign** to ensure uniformity across all your forms.

Like with other elements, hidden form elements can be copied to other forms in your account as well.

Step 3: Map your Hidden Field in Salesforce

Next, navigate to the **Mapping Editor in Salesforce** and select your Global Form.

In the Custom Fields box, enter **sf_campaign**

Select **Update Form Mapping** on the right-hand side.

This will make the custom field available to select in the **Source Field** drop down under Field Mapping.

Locate the existing field mapping for **Campaign ID**, and select the Edit action on the right-hand side.

From the Source Field picklist, remove Campaign - Id Relation and replace it with **sf_campaign**. Click Save on the right-hand side.

If there is no existing field mapping for the Campaign ID, add a new field mapping and select sf_campaign as your Source Field, Opportunity for Object, Campaign ID for SFDC Field Label > Add.

To save your changes, select Update Form Mapping in the upper right.

Once the field mapping for sf_campaign has been added to your Global Form, all you'll need to do moving forward is add the Hidden Element to any new GiveSmart Fundraise form you create.

Note: You may also follow these same steps to map a form to the SFDC Record Type. Use "**sf_record_type**" as the hidden field label, and the Salesforce Record Type ID as the Hidden Field Value. The Salesforce Record Type ID can be located from your Salesforce Setup > Object Manager. Drill down to the specific record type and grab the ID from the URL.