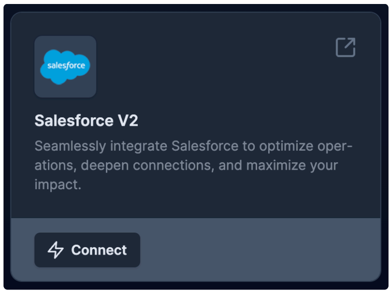
Connecting Your Salesforce Integration

Now that you've set up your Salesforce account and created your app, it’s time to connect it to our system. Follow along as we walk you through the steps to integrate Salesforce seamlessly.

Step 1: Accessing the Integration Page

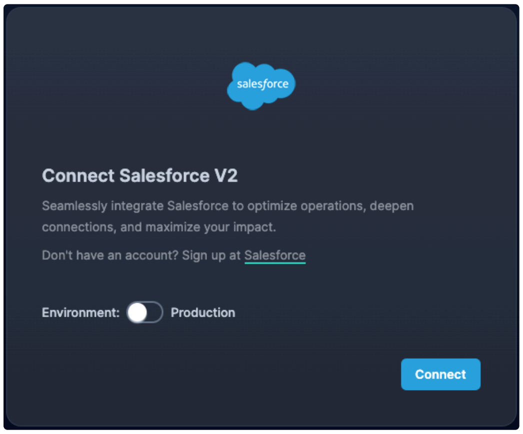
Once on the integration section on your GivenGain settings, navigating through the various integrations available. You will spot the Salesforce integration card among the list of integrations.



1. **Click the "Connect" Button**
   - On the integration page, locate the Salesforce integration card.
   - Click the **Connect** button on the card. This action will initiate the connection process.

Step 2: Choosing Your Environment

You’re now redirected to a page that asks you to select the environment in which you wish to integrate Salesforce. This step is crucial as it determines whether your connection is for testing or live data.



1. **Select Environment**
   - You’ll see a toggle that will allow you to seamlessly switch between your **Production** and **Sandbox** environments.
   - Choose the environment that suits your needs. If you’re testing and have a sandbox environment setup, select **Sandbox**; if you’re ready to go live, select **Production**. (Please note that sandbox login credentials are different to production e.g. *username.sandbox-name*)
2. **Connecting to Salesforce**
   - Once you’ve selected your preferred environment, click on the **Connect** button. This will take you to Salesforce and authenticate the connection.

Step 3: Authenticating with Salesforce

You'll be redirected to the Salesforce login page. This step ensures that your Salesforce credentials are securely authenticated.

1. **Log in to Salesforce (If not already authenticated)**
    - On the Salesforce login page, enter your Salesforce credentials (email and password) and click **Log In**.
    - Salesforce may prompt you to verify your identity with a code sent to your email or phone.
2. **Authenticate the Connection**
    - After logging in, Salesforce will ask you to allow access to our system. Click **Allow** to grant the necessary permissions.

Step 4: Completing the Integration

Once you've authenticated with Salesforce, you'll be redirected back to our platform. The integration process is almost complete.

You will be redirected back to the integration page on our platform.

Here, you'll see a confirmation that your Salesforce integration is now connected.

Congratulations! You've successfully connected Salesforce to our platform.
Previous Successful Donations will start to sync by default creating the relevant contacts, account and opportunity records.
Successful donation will also be pushed as live events.

Values that are currently being processed

Field	Value
Account	The charity name
Campaign	Associated campaign name
Contact	• Donor first name • Donor last name • Donor email
Opportunity	• name: {Donation Date} {Donor first name} {Donor last name} • closeDate: Donation Date, • amount: Donation Amount, • stageName: 'Closed Won', • accountId: accountId, • recordTypeId: Donation Record Type, • contactId: {The above contact ID}, • campaignId: {The above campaign ID},