

Connecting The Giving Block to Salesforce

STEP 1

Subscribe to The Giving Block & Salesforce

If you are not yet a client of The Giving Block, [get started here](#).

If you are not yet a client of Salesforce, [get started here](#).

STEP 2

Request Salesforce Integration

Once you are a client of The Giving Block, please [fill out this form](#) to begin integration set up.

STEP 3

Receive access to your public API login for The Giving Block

When you complete the integration request form, you'll receive your public API login from The Giving Block. Look for an email titled PublicAPI user set up. The email will contain a link to SendSafely storage that will prompt you to confirm your email address. After confirming, you will be presented with a text file to download, called "Credentials.txt". This will contain your login and password to connect to The Giving Block for Salesforce.

Note: The link expires and gets destroyed after 3 days or after 3 views. Please email integrations@thegivingblock.com if you need this resent.

STEP 4

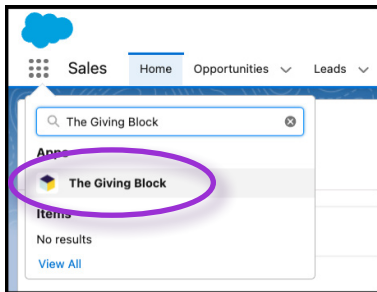
Install The Giving Block for Salesforce

Along with your public API login credentials, you will also receive a link from The Giving Block to install The Giving Block for Salesforce. Use that link to install the package within your Salesforce account.

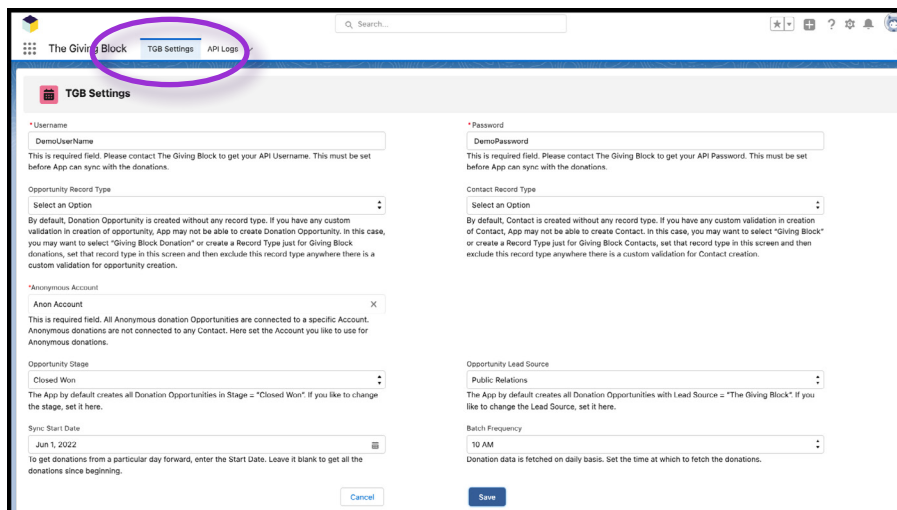
STEP 5

Connect your The Giving Block account to Salesforce

After you have completed the app installation, you'll need to connect your The Giving Block account & configure settings in Salesforce. Search for The Giving Block from the App Launcher.



Then click on TGB Settings, as you will then need to configure and set up the following fields to sync with your The Giving Block account.



Add the content on the following page to your TGB Settings:

Field	Content
Username	Username is a required field. Enter your login provided in Step 3 from The Giving Block via Send-Safely. This must be set before the Salesforce App can sync with your The Giving Block portal.
Password	Password is a required field. Enter your login provided in Step 3 from The Giving Block via Send-Safely. This must be set before the Salesforce App can sync with your The Giving Block portal.
Opportunity Record Type	By default, an opportunity record in Salesforce is created without any record type. If you have any custom validation in the creation of an opportunity record, The Giving Block App may not be able to create an opportunity record. In this case, you may want to select "The Giving Block Donation" or create a record type just for The Giving Block donations and set that record type here and then exclude this record type anywhere there is a custom validation for an opportunity that exists in your Salesforce instance.
Contact Record Type	By default, a contact record is created without any record type. If you have any custom validation in the creation of a contact record, The Giving Block App may not be able to create a contact record. In this case, you may want to select "The Giving Block" or create a record type just for The Giving Block contacts, set that record type here, and then exclude this record type anywhere there is a custom validation for a contact that exists in your Salesforce instance.
Anonymous Account	Anonymous Account is a required field. All anonymous donations made through The Giving Block are related to a specific Account that is set here. If you already have an Anonymous Account created in your Salesforce instance, select it from the lookup menu. If you do not have an Anonymous account created in your Salesforce instance, first create a new Account record with the Account Name of "Anonymous". Then come back to The Giving Block Setting page and select the newly created Account here. Anonymous donations are not connected to any Contact.
Opportunity Stage	The Giving Block App by default creates all opportunities and sets the Stage to "Closed Won". If you like to change the stage, set it here.
Opportunity Lead Source	The Giving Block App by default creates all opportunities with the Lead Source of "The Giving Block". If you like to change the Lead Source, set it here.
Sync Start Date	IMPORTANT: If you have previously imported any The Giving Block data into your Salesforce instance and do not update this date to the most recent date of your The Giving Block Donation then all The Giving Block donations will sync into Salesforce potentially creating duplicate records. To get donations from a particular day forward, enter the Start Date. Leaving this field blank will sync all of your Giving Block donations. ONCE SET IT IS ADVISED THAT YOU DO NOT UPDATE THIS FIELD
Batch Frequency	Set the time of day to sync new The Giving Block donations with your Salesforce instance.

Questions? Need assistance?

If you need any additional support, please reach out to integrations@thegivingblock.com.