Salesforce

APP

App User Guide

Overflow

Installing Overflow's Salesforce App

Connecting Overflow to your Salesforce instance will allow you to retrieve your transaction and donor information from Overflow and subsequently map this data to Salesforce standard objects such as Opportunities, Contacts, and Accounts. Records will be created or updated depending on the subsequent data being fetched.

WHAT YOU NEED

Integration Checklist

- [ ] step 1
  INSTALL THE OVERFLOW APP WITHIN YOUR SALESFORCE INSTANCE
- [ ] step 2
  CONFIGURE YOUR SECRET KEY
- [ ] step 3
  FETCH YOUR DATA FROM THE OVERFLOW PLATFORM
- [ ] step 4
  MAP OVERFLOW TRANSACTIONS TO OPPORTUNITIES AND ACCOUNTS
- [ ] step 5
  SET DEFAULT VALUES FOR MAPPED OBJECTS (OPTIONAL)
- [ ] step 6
  MAP OVERFLOW OBJECTS TO SALESFORCE OBJECTS
- [ ] step 7
  AUTOMATE OVERFLOW TRANSACTION REQUESTS (OPTIONAL)

Step-by-Step Instructions

☐	step 1 **INSTALL THE OVERFLOW APP IN YOUR SALESFORCE INSTANCE VIA APPEXCHANGE**

Note: It's recommended that your System Administrator who has full access to Opportunities, Accounts and Contacts completes this step.

☐	step 2 **AUTHORIZE CONNECTION TO THE OVERFLOW PLATFORM USING YOUR OVERFLOW SALESFORCE SECRET KEY**

1 - Log in to your Dashboard and go to Settings, then Integrations. Click to activate the Salesforce integration.
2 - In the Overflow Salesforce App, navigate to the Configurations tab. Paste your Overflow API Key in the text field for Overflow API Key and Click Submit.

☐	step 3 **REQUEST YOUR DATA FROM OVERFLOW**

1 - Within the Overflow Salesforce App, click the Home tab
2 - You will see a date range picker. Select a Start Date and an End Date. This will retrieve all your Overflow data between these selected dates.
3 - Click Retrieve Dates

- A message will appear below the button specifying whether the request was successful or not.

If the request was successful and there was data for those date ranges, click the Overflow Transactions tab. You will see the created objects for your data within this tab.

SEE HOW IT WORKS HERE

☐	step 4 **MAP THE OVERFLOW TRANSACTION FIELDS TO YOUR SALESFORCE OPPORTUNITIES AND ACCOUNTS**
1	Inside the Overflow Salesforce App, click the Mapping Editor tab.
2	When the page loads, you will see three columns: a. Overflow Transaction Field - the name of the field on the Overflow Transaction custom object. b. Mapped Object - the standard object that it will map and convert into. (Opportunity and Account) c. Mapped Field - the specific field of Opportunity/Account that this will be mapped to
3	See this spreadsheet for the latest Overflow Transactions fields and their respective data types
4	Click Edit. You will first be prompted to select which object you use to manage your donors. At this current time, Contact and Account are your supported types and this will determine what mappings you will see in the next step.
5	Click Next. Now, select to which field each of the Overflow Transaction fields should map. a. If you don't have appropriate fields to map to, pause this step and go create the appropriate custom fields for your object in Setup -> Object Manager and then return to this step. NOTE: If you create a new field for Overflow's external IDs, make sure to check the box in the field creator view that designates the new field as an external ID field.
6	You can select certain fields to be either active or inactive. This determines whether or not they will be considered when mapping/syncing. For example, if you don't care for the "Total Amount", you can opt to set that as inactive and you are not required to set a field mapping. Transaction ID and Donor ID must be active as these are External ID fields
7	Click Next. For each object you mapped in the previous step, you need to specify an External ID field that will be used to correctly identify existing objects. This will be important to know whether to create or update an object. a. The field you choose for each object must also be a field that you set as a mapping in the previous step. b. If none of the fields on your object are an External ID field, you can change this in Setup -> Object Manager. c. We recommend that you use the object/field that you assigned to Overflow_Transaction.ID and Overflow_Transaction.Donor_ID as the External ID fields as these are unique identifiers from Overflow.
8	Click Save.

SEE HOW IT WORKS HERE

step 5 OPTIONAL

SET DEFAULT VALUES FOR MAPPED OBJECTS

1 - Inside the Overflow Salesforce App, click the Defaults Editor.
2 - Click Edit and add new rows. For each row, you can specify an object, a field within that object, and then what value should be defaulted each time you map an Overflow transaction into that object.
3 - You will be able to specify a string or text as the default value, which will support all text and picklist fields.
  a. For example, if you want Opportunity Stage to always be a custom value "Received", you can specify that in the Defaults Editor.

SEE HOW IT WORKS HERE

step 6

MAP YOUR OVERFLOW TRANSACTIONS INTO SALESFORCE OBJECTS

1 - Inside of the Home tab, you will see a section for New Transactions
  - If you have just fetched transactions, you may need to refresh the page to see the updated list.

2 - In order to map these into Salesforce objects, either select which of the transactions you want to map or select all of them and then click Map Transactions.
  a. If successful, you will see a message indicating that the Overflow Transactions have been mapped to your objects

3 - Go to the objects you have selected as mappings (Opportunities, Accounts) and see that the data is now there.
4 - If you do not want to map a transaction, you can delete that transaction from the integration in the Overflow Transactions tab.

SEE HOW IT WORKS HERE

step 7

AUTOMATE YOUR OVERFLOW TRANSACTION REQUESTS + MAPPING

Let's make your life easier and allow you to automate daily requests to Overflow.
1 - In Setup, use the Quick Find box to go to Apex Classes
2 - Inside the Apex Classes page, click Schedule Apex
3 - Input the name you would like the job to be called (i.e. ScheduledOverflowGetTransactionsRequest)
4 - For Apex Class, select the one named GetOverflowTransactions
5 - Schedule the frequency weekly and then select every day of the week - this will create a daily recurring schedule that will fetch all transactions in the past 24 hours and create Overflow Transaction objects.
  a. Note: you will still need to manually convert these to your Salesforce Objects in the Manual Sync tab

6 - Select the maximum possible End Date to ensure the job will continue for as long as possible
7 - Select a preferred Start Time
8 - Click Save. Now transactions will automatically pull into the Salesforce app. See how it works here
9 - Next, follow steps 1 through 8 again to set up a separate automation to map your transactions to the contact and account. This time, search for the Apex Class named MapOverflowTransactions.

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