Engaging Networks Salesforce Connector

Documentation

Latest Package Version: 1.4

Last updated: 2026-09-08

Log

2026-09-08	Added content and implemented edits to Nonprofit Cloud section
2026-07-28	Added section for Nonprofit Cloud support and included instructions to contact Support for package link. Small tweaks
2026-05-18	Amended Kindsight Ascend integration instructions to include field formulas
2026-04-06	Added Kindsight Ascend integration information Added information for Enterprise Data Sync Edited Table of Contents Removed unneeded ‘TBD’ sections Included Salesforce task list from onboarding Basecamp

2026-03-13	Lightly edited overview section for accuracy. Updated install link with latest package. Updated installation instructions. Updated references to hourly contact sync to reflect sync every 20 mins.
2025-08-22	Reordered default mappings to match in-platform running order. Added “Fundraising Recurring - New RD for Imported Transactions” rule for recurring migrations.
2025-08-06	Updated names of Peer-to-Peer mappings
2025-05-29	Added Peer-to-Peer mapping reference information
2024-06-10	Updates to the following mapping rules, to include 'group by' improvements and updates to support for NPSP Enhanced Recurring Donations. Added "Fundraising Recurring - Card Update" mapping to process the FRU transaction type.
2024-06-04	Added merge example
2024-05-12	Included documentation for package 1.32 release Reference to URLs to point to https://*.engagingnetworks.app Updated Sync Settings ● De-duplicate (Leverage Salesforce) ● Reflect merge Updated ‘Merging Supporters and Contacts’ section as merges can now be mirrored from Salesforce to Engaging Networks Updated ‘Prefered Email, Personal Email, Work Email or Alternate Email?’ section to include the account setting to handle secondary email address Added line around Flow rules, under Contact Syncing Changed language from ‘workflow’ to Flow rules
2023-10-11	Primary release of Engaging Networks Salesforce Connector

Table of Contents

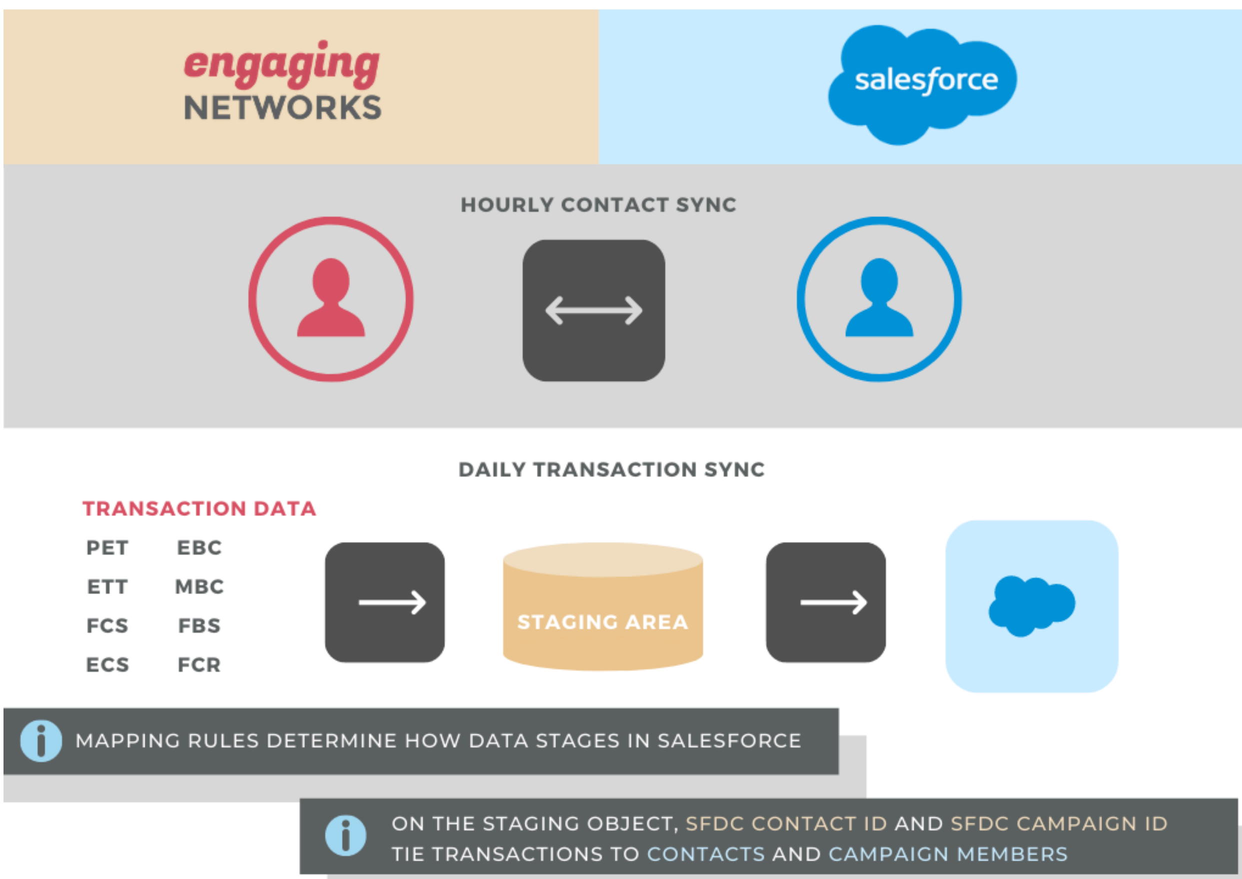
Overview

The Salesforce Connector offers a bi-directional Contact Sync every 20 minutes and a daily Transaction Sync.

For the Contact Sync, Engaging Networks keeps track of which supporters require syncing via an internal timestamp. Engaging Networks then compares Contacts that have been altered, against EN Last Modified Date on the Contact.

For the Transaction Sync, supporter actions are pushed as staging records inside Salesforce.

Our *Engaging Networks Connector App* processes these staging records according to configurable 'Mapping Rules'.



Installation Steps

- Install the Engaging Networks Connector App
- Install the NPSP Extension Package (if required)
- Inside Engaging Networks
    - Authenticate to Salesforce account
    - Setup Contact Mapping
    - Install NPSP Transaction Mappings
        - Integrators have full control of how data should be represented in Salesforce. Engaging Networks offers a set of transaction Mapping Rules, geared for NPSP ‘Classic’. However, this tool provides high flexibility to alter to match business requirements.
- Consider business rules and involve key stakeholders
- UAT
- Enable Sync in production

Engaging Networks Connector App

Installation

Engaging Networks Connector Package (latest version: 1.4):
Contact Engaging Networks Support for the current package link.

When installing:

> ⓘ If intended for a test sandbox - please be sure to use https://test.salesforce.com instead of https://login.salesforce.com, in the URL.
>
> ⓘ Prior to installation, be sure that the Salesforce org has My Domain set and activated. This is most likely the case for new developer orgs.

Whilst logged in to the intended Salesforce org, in the same tab, paste the package URL to the address bar.

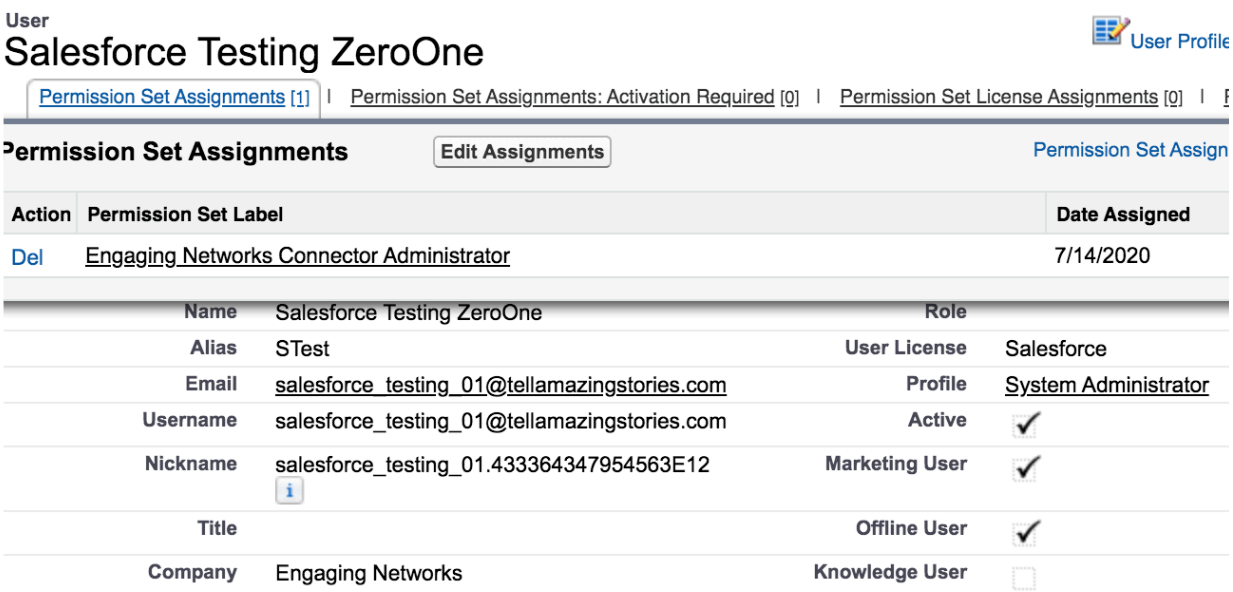
Salesforce will drop into the installation process of the package.

Select “Install for all users”.

Feel free to hit the “Done” button and wait for the confirmation email from the Salesforce org, confirming the package has completed successfully.

Permission Set

The final installation step prior to configuring the integration, is applying the **Engaging Networks Connector Administrator** to the users Permission Set, which will administer the connector.



Engaging Networks NPSP Extension Package

If your organization is using Salesforce's NonProfit Success Pack *and* representing Recurring Gifts via the Recurring Donation object, then please install the following Engaging NPSP extension package.

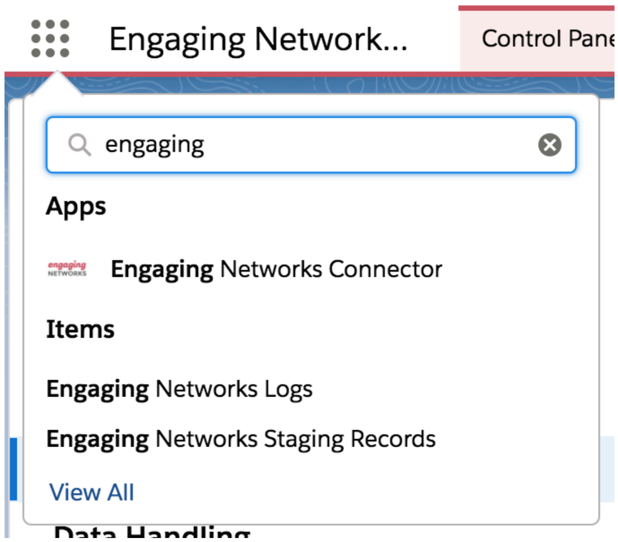
This package will install the following two fields, on to npe03__Recurring_Donation__c

engaging_npsp__EN_Parent_Transaction_Id__c
engaging_npsp__EN_Parent_Tracking_Value__c

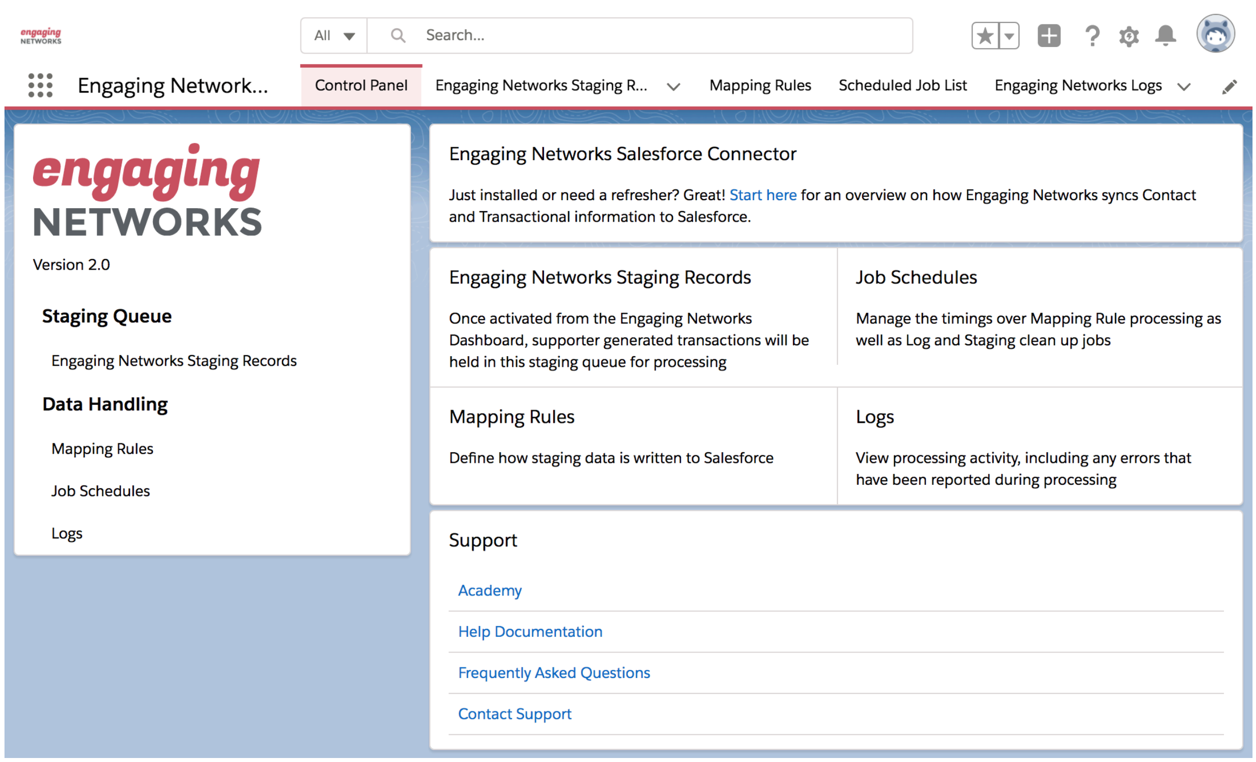
Installation link
https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4K0000015dwI

Control Panel

Using the Apps menu, locate the Engaging Networks Connector App.



The control panel provides quick access to relevant documentation and areas of the tool.



Engaging Networks Staging Records

If inside Engaging Networks' Salesforce settings and "Sync Transaction data to Salesforce" is enabled, every morning (+-2am EDT) transactional data will be pushed to the Salesforce org.

Engaging Networks Staging Records represent supporters actions that have occurred from the previous day. Examples could include Petitions (PET), Email to Target (ETT), Fundraising Credit Single (FCS) and Fundraising Credit Recurring (FCR) etc. based on the modules being used in the Engaging Networks account.

Please refer to the support documentation on how the 'Transaction format' is structured. This gives an integrator all they need to understand how to access pieces of data. For example - getting the donation amount or tracking value from an FCS row.

These objects thus represent a 'staging' queue which the Mapping Rules use to extract the information in order to map to various sobjects in Salesforce.

> ⓘ **SFDC Contact Id** and **SFDC Campaign Id** are passed from Engaging Networks to allow staging records information to be associated with the relevant Contact and Campaigns.

> ⓘ As Contact syncing is handled by Engaging Networks, the Engaging Networks Staging Record fields are transactionally specific. The only supporter information included is First Name, Last Name and Email.

Included in the package are a number of Views, to help isolate the different transactions types on offer.

Advocacy Txns Unprocessed highlights staging records whose Transaction Type is PET or ETT or CTT or TWT and whose Processed Flag is false.

Mappings Rules

Mappings Rules are the core of the transaction processing engine. They provide the lookup rules for staging objects and the directives of writing staging data to the respective Salesforce objects.

A mapping rule allows the following to be done : "find staging objects that are single credit card gifts and then write them as opportunities, linking them to a Contact" etc.

Engaging Networks offers a collection of mappings, on installation, that form the base of the NPSP integration.

However, you have complete control over the mappings and which objects should represent the data from Engaging Networks.

For example, if you do not wish to represent Advocacy transactions as CampaignMembers and use a custom object instead, or if your organization is not using NPSP - this can be achieved through the Mapping Rules.

Default Mappings

Engaging Networks offers a set of default mappings geared for the NonProfit Success Pack installation. Implementers are encouraged to customize these default mappings to their particular NPSP configurations.

Mappings can be installed through the Engaging Networks dashboard, under [Transaction Mappings](#).

For reference, JSON representations of the mappings can be found at the Engaging Networks GitHub repository : https://github.com/EngagingNetworks/salesforce-connector-mappings

Included in the Engaging Networks dashboard are options of exporting and importing Mapping Rules as JSON. This offers a Salesforce admin the ability to easily create backups and/or methods of transferring 'tested' rules from Sandbox to Production.

Contact Top Up (template)

Because the Contact Sync runs every 20 minutes, it is expected that all transactions written to the ENSR table will have a corresponding SFDC Contact Id. Most mappings rely on this Contact Id, for example to attach a new Opportunity to the donor, or to add the Contact to a Campaign. In the event an ENSR arrives with no SFDC Contact Id, this mapping creates a simple contact (First Name, Last Name, and Email only) so the mappings can proceed. This new Contact should be picked up by the contact sync and filled in with the remaining supporter details (address, etc.) shortly after creation. (This previously ran on Fundraising transactions only, but has been generalized to all transactions with a 'Group by' ensuring the mapping avoids creating duplicate Contacts)

Advocacy - Create Campaign Member (template)

Transaction Types: PET, CTT, ETT, TWT
If an advocacy page is configured with SFDC Campaign Id, this mapping rule adds participants to the Campaign. The Campaign Member status is set to Responded.

> ⓘ This particular mapping only runs if the Contact is not a pre-existing member of the Campaign. Salesforce does not permit adding a Contact twice to the same Campaign. A trigger installed on the ENSR object assists: if both Campaign Id and Contact Id are populated when the ENSR is created, the trigger checks whether a Campaign Member already exists for this Contact/Campaign combination. If a match is found, the trigger writes the Campaign Member Id to the ENSR. This way, this "create" mapping avoids creating a duplicate Campaign Member by checking the SFDC CampaignMember Id field.

> ⓘ If multiple unprocessed staging records are present for the same Contact Id - Campaign Id pair, this mapping rule does a 'group by' ensuring the contact is added to the campaign just once. This can happen for ETT, for example, where one action with 4 targets can result in 4 distinct staging record rows.

Advocacy - Update Existing Campaign Member (template)

Transaction Types: PET, CTT, ETT, TWT
This mapping is a companion to "Advocacy - Create Campaign Member" above. In the event a Campaign Member already exists, this mapping updates the status of this pre-existing Campaign Member status to "responded".

> ⓘ If multiple unprocessed staging records are present for the same Contact Id - Campaign Id pair, this mapping rule does a 'group by' ensuring the contact is added to the campaign just once. This can happen for ETT, for example, where one action with 4 targets can result in 4 distinct staging record rows.

Engagement - Create Campaign Member (template)

Transaction Types: SVY, EMS, UNS, ECF
If an engagement page is configured with SFDC Campaign Id, this mapping rule adds participants to the Campaign. The Campaign Member status is set to Responded.

Engagement - Update Existing Campaign Member (template)

Transaction Types: SVY, EMS, UNS, ECF

This mapping is a companion to "Engagement - Create Campaign Member" above. In the event a Campaign Member already exists, this mapping updates the status of this pre-existing Campaign Member status to "responded".

Email Open - Create Campaign Member (template)

Transaction Types: EBC, MBC
If an outgoing email (broadcast or marketing automation) is configured with SFDC Campaign Id, this mapping rule adds email openers to the Campaign. The Campaign Member status is set to Responded.

Email Open - Update Existing Campaign Member (template)

Transaction Types: EBC, MBC
This mapping is a companion to "Email Open - Create Campaign Member" above. In the event a Campaign Member already exists, this mapping updates the status of this pre-existing Campaign Member status to "responded".

Fundraising Single - Opportunity (template)

Transaction Types: FCS, FBS, FOC
The first of two mappings for processing one-time (single) donations, this mapping builds out an Opportunity for each successful fundraising transaction. By default, the mapping includes standard fields such as Amount and Close Date. It also writes the EN Tracking and Appeal Codes to open up the possibility for analysis through Salesforce reports. The gateway reference (EN Transaction Id field) preserves an audit trail between Salesforce Opportunities, Engaging Networks Transactions, and your payment gateway.

The mapping relies on the following NPSP components. If any of these are not used in your Salesforce org, you will need to adjust the mapping rule accordingly:

- Opportunity Naming Rules are active
- Stage picklist has a value named "Posted"
- You are using the NPSP Payments object

Fundraising Single - Payment (template)

Transaction Types: FCS, FBS, FOC
The second of two mappings for processing one-time (single) donations, this mapping builds out a Payment object for each successful fundraising transaction. The mapping marks the payment as "paid", records the Payment Method (Credit Card or ACH/EFT), and records the gateway reference as Check/Reference Number to preserve clear audit trails.

> ⓘ If your Salesforce org uses NPSP's GAU Allocation object, you might need to write a third mapping rule for this purpose. If you are using NPSP Default Allocations, you can simply place a GAU Allocation on the Campaign that is referenced by the field. No mapping changes are needed. If you are not using Default Allocations, you can use the "direct my gift" tagged field (Transaction Data 20) as either a hidden field, or as a picklist, to hold the fund designation. You will need to build an additional mapping rule to handle the allocation, and ensure it is properly chained into the Opportunity - Payment - Allocation chain (don't mark as complete until all 3 elements have run.)

Fundraising Recurring - New RD for Imported Transactions

Transaction Types: FCR, FBR, where Transaction Data 4 = .00

When recurring transactions are migrated/imported into Engaging Networks, an initial $0.00 transaction is created indicating that the gift has been imported. This mapping rule uses the data stored on these initial rows to create the Recurring Gift that can be updated the next time the transaction processes. It functions very similarly to the Fundraising Recurring – New RD mapping rule (see below) but uses different criteria to find imported transactions.

Fundraising Recurring - New RD (template)

Transaction Types: FCR, FBR, where Transaction Data 11 is empty
The first of three mappings for processing a *new* Recurring Donation commitment. This mapping rule creates an NPSP Recurring Donation object, with "Active" status and Monthly/Quarterly/Annual frequency. The gateway id (Data 2) is stored on the Recurring Donation (EN Parent Transaction Id), as this "parent transaction id" will be used for processing all subsequent recurring charges.

NPSP automatically creates a series of "pledged" Opportunities matching the anticipated payment schedule. The first of these "pledged" opportunities will be marked as "posted" in a subsequent mapping rule.

> ⓘ The default mappings are configured to work with NPSP's Enhanced Recurring Donations model, with Future Pledged Opportunities configured to create at least 1 pledged Opportunity. If you have turned off Pledged Opportunities in NPSP settings, you will need to modify the "Fundraising Recurring - Opportunity" mapping to create a new Opportunity instead of looking up & updating an existing Opportunity.

Fundraising Recurring - Lookup & Update RD - success (template)

Transaction Types: FCR, FBR, where Transaction Data 11 is not empty

The first of three mappings for processing a *subsequent* recurring transaction. This mapping rule uses the "parent transaction id" of the incoming transactional data (Transaction Data 11) to look up the Recurring Donation that was created when the commitment was first initiated. The parent is written to the SFDC Recurring Donation Id field. This mapping also updates the parent Recurring Donation with the latest "amount" and "day of month" that is configured with Engaging Networks to ensure NPSP and EN payment schedules remain in sync, and ensures the RD status is set to "Active".

Fundraising Recurring - Opportunity (template)

Transaction Types: FCR, FBR
The second of three mappings for both *new* and *subsequent* recurring transactions. This mapping rule looks up a "pledged" Opportunity in the parent RD's payment schedule, and updates the status from "pledged" to "posted". It also updates the *actual* Close Date for the Opportunity (sometimes this varies from the scheduled date, for example if the card was declined at first but succeeded on a retry), the *actual* Amount processed, the tracking values/appeal codes, and the gateway Id for the transaction.

Note, for a pledged Opportunity to be identified and posted, the *scheduled* Close Date for the Opportunity must be <u>on or before</u> the *actual* processing date of the transaction. This is specified in the Matching Rule filter.

Fundraising Recurring - Payment (template)

Transaction Types: FCR, FBR
The third of three mappings for both *new* and *subsequent* recurring transactions. This mapping rule attaches a Payment to the Opportunity that was changed from "pledged" to "posted". If the pledged Opportunity already had a Payment on it, the mapping updates that existing payment instead of creating a new one. The Payment is marked as "paid" and both the Payment Method and Gateway Id are captured.

Fundraising Recurring - Lookup & Update RD - change (template)

Transaction Types: FCR, FBR, status = change/reject
Run when a recurring transaction record has status of "change" or "reject", this mapping helps keep NPSP's Recurring Donations in sync with what is happening on the Engaging Networks side. This mapping:

- Updates an RD from "Active" to "Lapsed" if Engaging Networks has automatically suspended payments due to 3+ declines on the credit card.
- Updates an RD from "Active" to "Closed" if the Engaging Networks donation has been cancelled

- Updates an RD from "Active" to "Closed" if the Engaging Networks donation has been paused
- Updates the Day of Month and Amount if either of these have changed in Engaging Networks (e.g. if donor upgrades their monthly gift)

Fundraising Recurring - Card Update (template)

Transaction Types: FRU
When a donor updates their payment card information via the supporter hub, or a user updates the donor's payment card information, the Parent Transaction Id changes for the recurring sequence. The FRU transaction allows us to look up the RD that is attached to the prior Parent Transaction Id (Transaction Data 11) and write in the new Parent Transaction Id (Transaction Data 02) so future transactions can be properly matched up to the correct parent RD.

Fundraising In Memoriam (template)

Transaction Types: FIM
When a tribute gift is processed in Engaging Networks, two transaction rows are generated. The first row is the financial detail (FCS/FBS) which is processed using the same mapping as non-tribute gifts, "Fundraising Single - Opportunity." The second row is the In Memorium transaction (FIM).

This mapping looks up the Opportunity that was created through the prior "Fundraising Single - Opportunity" rule, and appends Tribute information to this Opportunity per the FIM transaction row. The sample mapping writes:

- Tribute Type = Honor
- Honoree Name
- Notification Recipient Name
- Notification Recipient Information (Email and/or Mailing Address) - this field is populated via a formula field on the ENSR ("Additional Note") which draws all the relevant data into one common field

This mapping is a *sample* of processing tribute gifts. This rule will need to be customized for your situation, as Tribute setup varies significantly between Engaging Networks configurations. For example, you likely offer Tribute Type = Memory as well, and you might offer the donor different options for sending an eCard, sending an email notification, or requesting that a letter be mailed by your organization on the donor's behalf. You will need to update this mapping to reflect the options you expose to your donors, as well as the fields you have used to build your form.

> ⓘ A common scenario is to use the "Reason for Gift" tagged field (Transaction Data 10) to indicate In Memory / In Honor selection, and the "Tribute Options" tagged field

(Transaction Data 9) for the donor to select how they want a notification delivered to the honoree/designate.

Event Purchase - Opportunity (template)

Transaction Types: ECS, EBS, ECC
This mapping rule mirrors "Fundraising Single - Opportunity". See above. Note that the event mapping records the ticket purchaser (ECS/EBS/ECC) but not individual attendees (ETA). It captures "free" tickets as $0 opportunities.

> ⓘ You will likely update this mapping rule to include a custom Record Type from your Salesforce org corresponding to ticket purchases.

Event Purchase - Payment (template)

Transaction Types: ECS, EBS, ECC
This mapping rule mirrors "Fundraising Single - Payment". See above.

Refund - Opportunity (template)

Transaction Types: RFD, EFD
This mapping creates a *negative opportunity* corresponding to a refund processed by Engaging Networks. It does not alter the original opportunity.

Refund - Payment (template)

Transaction Types: RFD, EFD
This mapping creates a *negative payment* corresponding to a refund processed by Engaging Networks. It does not alter the original payment.

Peer-to-Peer Mapping Templates

The Peer-to specific mapping rules are designed to work with Salesforce's Campaign Hierarchy Structure, and take advantage of summary functionality.

- Each Campaign will summarize both the campaign members and opportunities related to it in addition to the summary of each child campaign's totals.
- Please note that the limit of hierarchy for Salesforce is 5 levels. As templated, including Organizations and Teams, this hierarchy structure is 4 levels.
- As with all Engaging Networks mappings, they can be customized to work with your Salesforce configuration.

- If you are not using Organizations or Teams, excluding relevant templates from installation will not affect the other mapping templates.

Peer-to-Peer Site - Create Parent Campaign - PSTE (template)

Transaction Types: PSTE
This mapping finds a Campaign record, using the Page Id (EN Campaign Id), or creates a new Campaign record if none is found, and updates information. This Campaign represents the Site Donation Page, and is the parent campaign for the hierarchy.

Peer-to-Peer Site - Create Organization Page Campaign - PFOC (template)

Transaction Types: PFOC
This mapping finds a Campaign record, using the Page Id (EN Campaign Id), or creates a new Campaign record if none is found, and updates information. This Campaign represents the Organization Donation page, which both Team and Fundraiser Pages can be childed to.

Peer-to-Peer Site - Create Team Page Campaign - PFTC (template)

Transaction Types: PFTC
This mapping finds a Campaign record, using the Page Id (EN Campaign Id), or creates a new Campaign record if none is found, and updates information. This Campaign represents the Team Donation page, which Fundraiser Pages can be childed to.

Peer-to-Peer Site - Create Individual Page Campaign - PFRP (template)

Transaction Types: PFRP
This mapping finds a Campaign record, using the Page Id (EN Campaign Id), or creates a new Campaign record if none is found, and updates information. This Campaign represents the Fundraiser Donation page, and can be childed to any of the other Campaign types.

Peer-to-Peer - Update Fundraiser's Team Campaign - Remove (PFTE) (template)

Transaction Types: PFTE
This type represents the Engaging Networks action of removing a Fundraiser from a Team. This mapping finds a Campaign record, using the Page Id (EN Campaign Id), and sets the Parent Campaign back to the Site level campaign, removing it and all related opportunities to a new place in the hierarchy directly below the Site Campaign.

Peer-to-Peer - Update Org Campaign of Fundraiser/Team - Remove (PFOE) (template)

Transaction Types: PFOE

This type represents the Engaging Networks action of removing a Fundraiser or Team from an Organization. This mapping finds a Campaign record, using the Page Id (EN Campaign Id), and sets the Parent Campaign back to the Site level campaign, removing it and all related opportunities to a new place in the hierarchy directly below the Site Campaign.

Peer-to-Peer - Update Org Campaign of Fundraiser/Team - Add (PFOA) (template)

Transaction Types: PFOA
This type represents the Engaging Networks action of adding a Fundraiser or Team to an Organization. This mapping finds a Campaign record, using the Page Id (EN Campaign Id), and sets the Parent Campaign to the Organization campaign, moving it and all related opportunities to a new place in the hierarchy directly below the Organization Campaign.

Peer-to-Peer - Update Fundraiser's Team Campaign - Add (PFTA) (template)

Transaction Types: PFOA
This type represents the Engaging Networks action of adding a Fundraiser or Team to an Organization. This mapping finds a Campaign record, using the Page Id (EN Campaign Id), and sets the Parent Campaign to the Organization campaign, moving it and all related opportunities to a new place in the hierarchy directly below the Organization Campaign.

Peer-to-Peer - Update Campaign Page (TPPU, IPPU, OPPU) (template)

Transaction Types: TPPU, IPPU, OPPU
This mapping updates existing campaign records (name, goal, etc.) to match Engaging Networks pages. If multiple changes occur in one day, it will group changes and choose the most recent record for updating the campaign, which will have all final updated data.

Peer-to-Peer Single Donation - Opportunity (template)

Transaction Types: PFCS, PFBS, PPAY, PACS
This mapping rule mirrors the Fundraising Single - Opportunity (see above). This mapping rule finds the appropriate campaign depending on the Page the donation came through (Using EN Campaign Id) rather than pulling in the Campaign Id set on a page.

Peer-to-Peer Single Donation - Payment (template)

Transaction Types: PFCS, PFBS, PPAY, PACS
This mapping rule mirrors the Fundraising Single - Payment (see above).

Peer-to-Peer - Fundraising Recurring - New RD (template)

Transaction Types: PFCR, PFBR
This mapping rule mirrors the Fundraising Recurring - Payment (see above).

Peer-to-Peer - Fundraising Recurring - Opportunity (template)

Transaction Types: PFCR, PFBR
This mapping rule mirrors the Fundraising Recurring - Opportunity (see above).

Peer-to-Peer - Fundraising Recurring - Payment (template)

Transaction Types: PFCR, PFBR
This mapping rule mirrors the Fundraising Recurring - Payment (see above).

Peer-to-Peer - Fundraising In Memoriam (template)

Transaction Types: PFIM
This mapping rule mirrors the Fundraising in Memoriam mapping. (see above).

Peer-to-Peer - Refund - Create Reverse Opportunity (template)

Transaction Types: PRFD
This mapping rule mirrors the Refund - Create Reverse Opportunity (see above).

Peer-to-Peer - Refund - Create Reverse Payment (template)

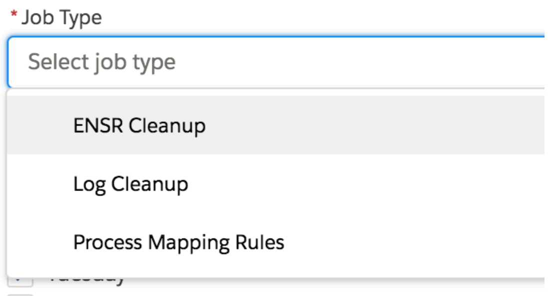
Transaction Types: PRFD
This mapping rule mirrors the Refund - Create Reverse Payment (see above).

Creating Custom Mappings

If you wish to alter or create new mappings, the Mappings Rules area allows control of this administration.

Jobs Schedules

Three schedulable jobs are available in the Engaging Networks Connector.



ENSR Cleanup

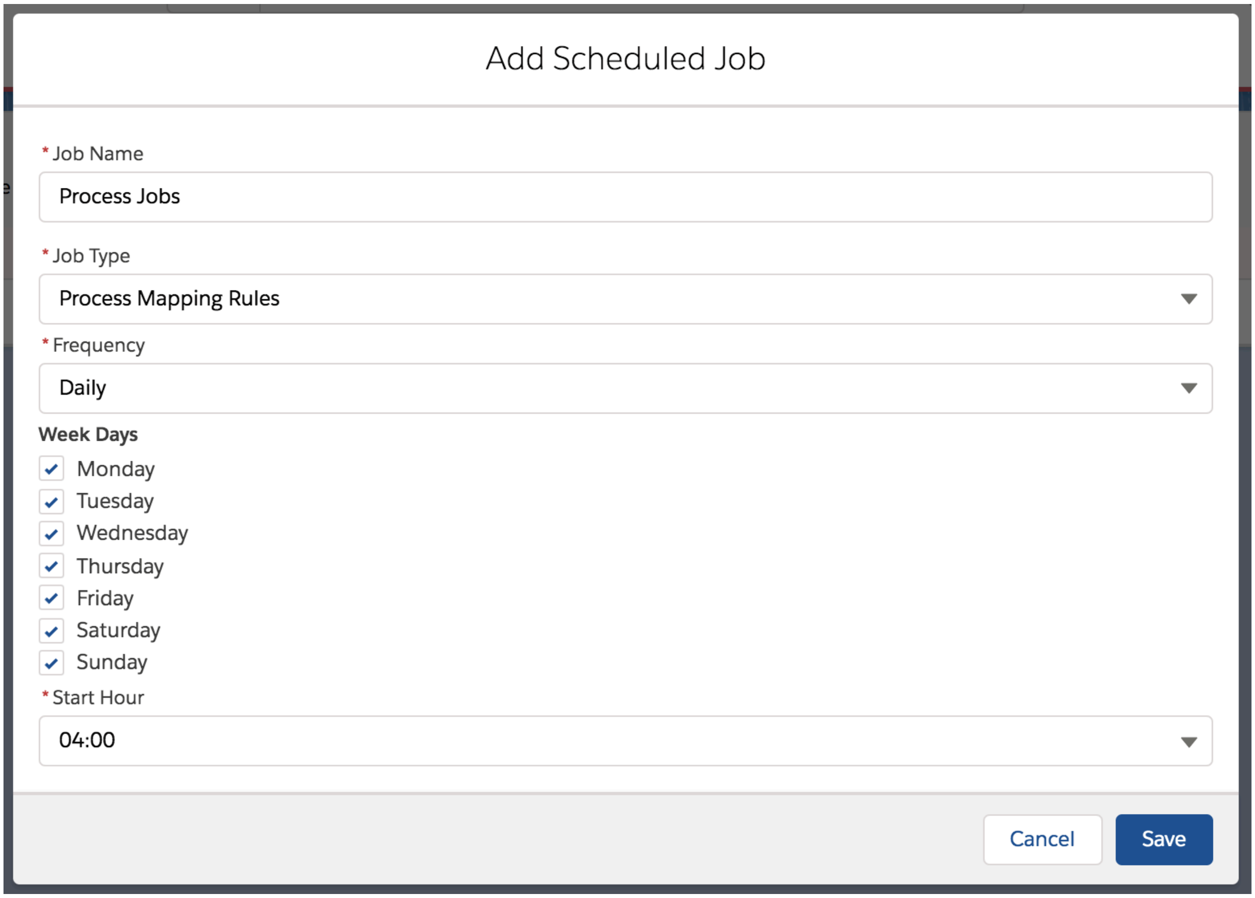
Delete X days old Engaging Networks Staging Records

Log Cleanup

Delete X days old Engaging Networks Logs

Process Mapping Rules

Process ‘active’ Mappings Rules, in order of priority. At this time, please only utilize the ‘daily’ option and schedule processing for after 3am EDT.



Engaging Networks Logs

Included in the package are a number of Views, to help isolate the different Logs that are generated. The following events trigger Logs to be generated :

Engaging Networks Contact Push
On pushing Contact information, Engaging Networks will create a Log record denoting Success and Failures count.

> ⓘ There is a similar screen inside Engaging Networks and allows review of 'failures'.

Engaging Networks Contact Pull

On pulling Contact information, Engaging Networks will create a Log record denoting Record Count

Engaging Networks Transaction Push

On pushing Transactional information, Engaging Networks will create a Log record denoting Success and Failures count.

Processing Errors

There are two ways for Mapping Rules to run: either by invoking the ‘Manually Process’ option, under Mapping Rules, or when the ‘Mapping Rule Process’ job is scheduled and processing occurs.

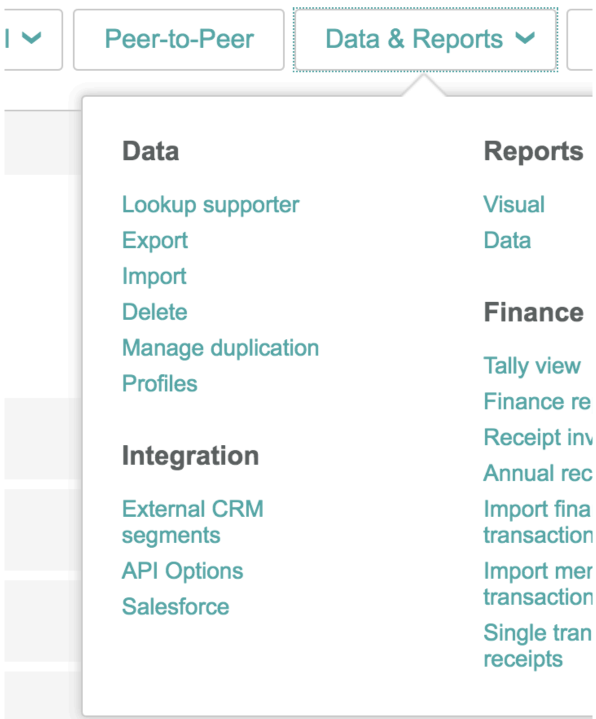
In both occasions, if an apex error is thrown a Log record will be generated.

Look out for the description as to why there has been a failure. If you are building out new Mapping Rules and testing, it may be that a field permission is not allowing the object to be created for example.

Engaging Networks Configuration

License

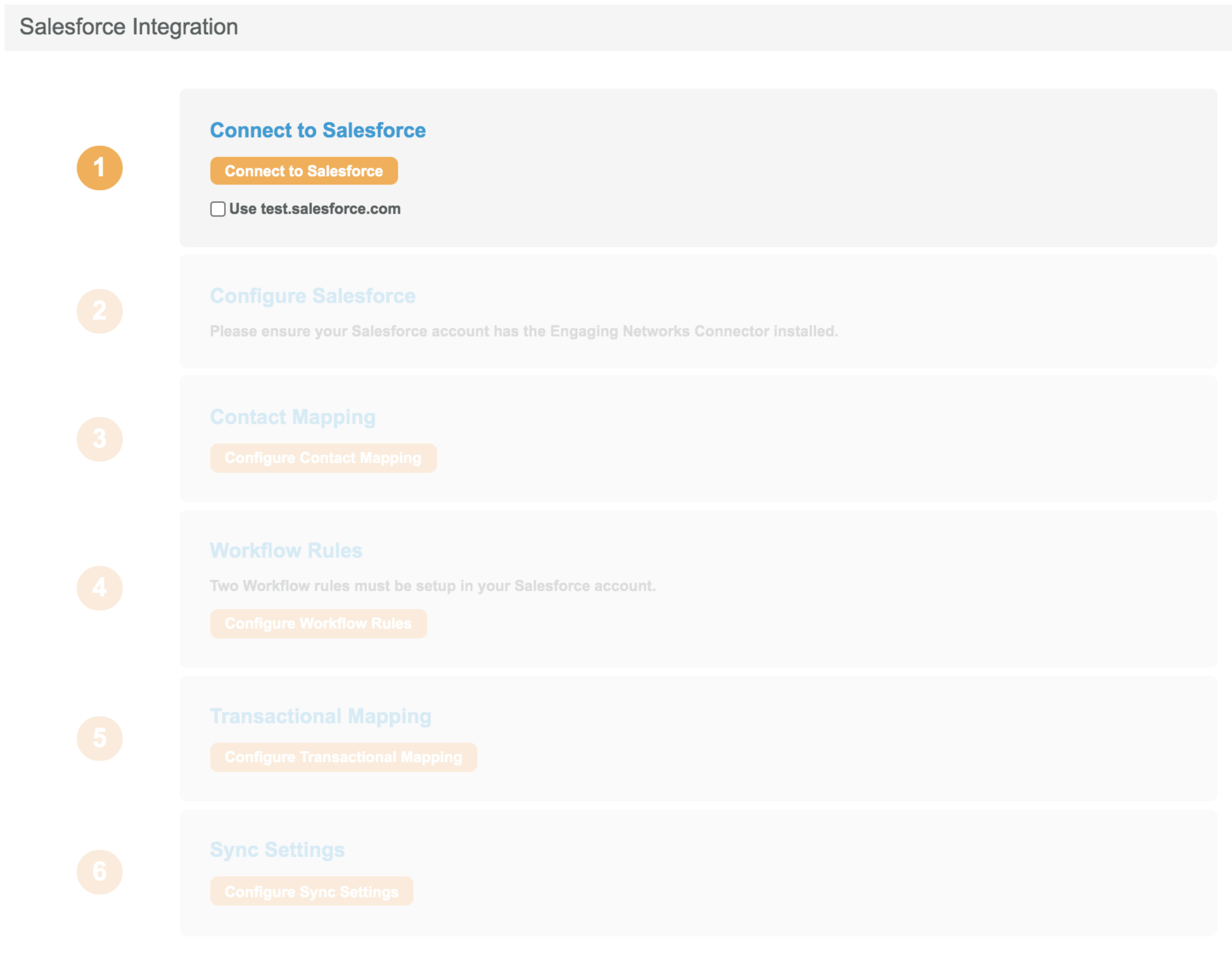
On the Data & Reports navigation and under the Integration sub menu, should be the option Salesforce. If it is not, contact your Engaging Networks account representative to add the Salesforce license to your account.



Authentication

On accessing Salesforce, from the navigation, you will enter the setup wizard.

Begin by authenticating to the respective Salesforce org. If you wish to link to a sandbox account, check the *Use test.salesforce.com* option prior to connecting.


Salesforce Integration
1
Connect to Salesforce
Connect to Salesforce
Use test.salesforce.com
2
Configure Salesforce
Please ensure your Salesforce account has the Engaging Networks Connector installed.
3
Contact Mapping
Configure Contact Mapping
4
Workflow Rules
Two Workflow rules must be setup in your Salesforce account.
Configure Workflow Rules
5
Transactional Mapping
Configure Transactional Mapping
6
Sync Settings
Configure Sync Settings

Contact Mapping

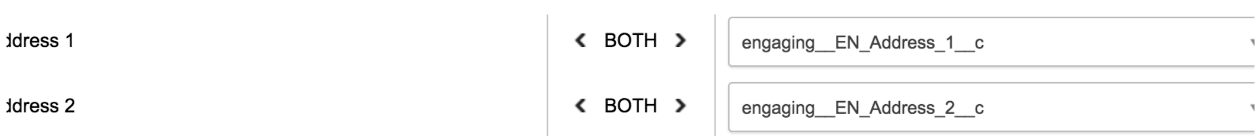
Once configured, you will select which fields to sync from Supporter to Contact through the Contact Mapping section of the wizard.

The only required fields to map are Email Address and Last Name. The Salesforce Contact ID, Engaging Networks Client ID, and Engaging Networks Supporter ID will automatically map and indicate the field names in both systems. Additional fields can be added to sync through the ‘Manage Fields’ button below the default fields included to map.

The ‘sync way’ for all contact fields can be BOTH, PULL (to Engaging Networks) or PUSH (to Salesforce). To change the direction of the sync, you will click the phrase in the ‘Sync Direction’ column indicating ‘BOTH,’ ‘PULL,’ or ‘PUSH’ between the specific field sync you are modifying.

> ⓘ If using NPSP formula fields and only want data ‘to EN,’ click to toggle the sync between the specific fields to ‘PULL.’

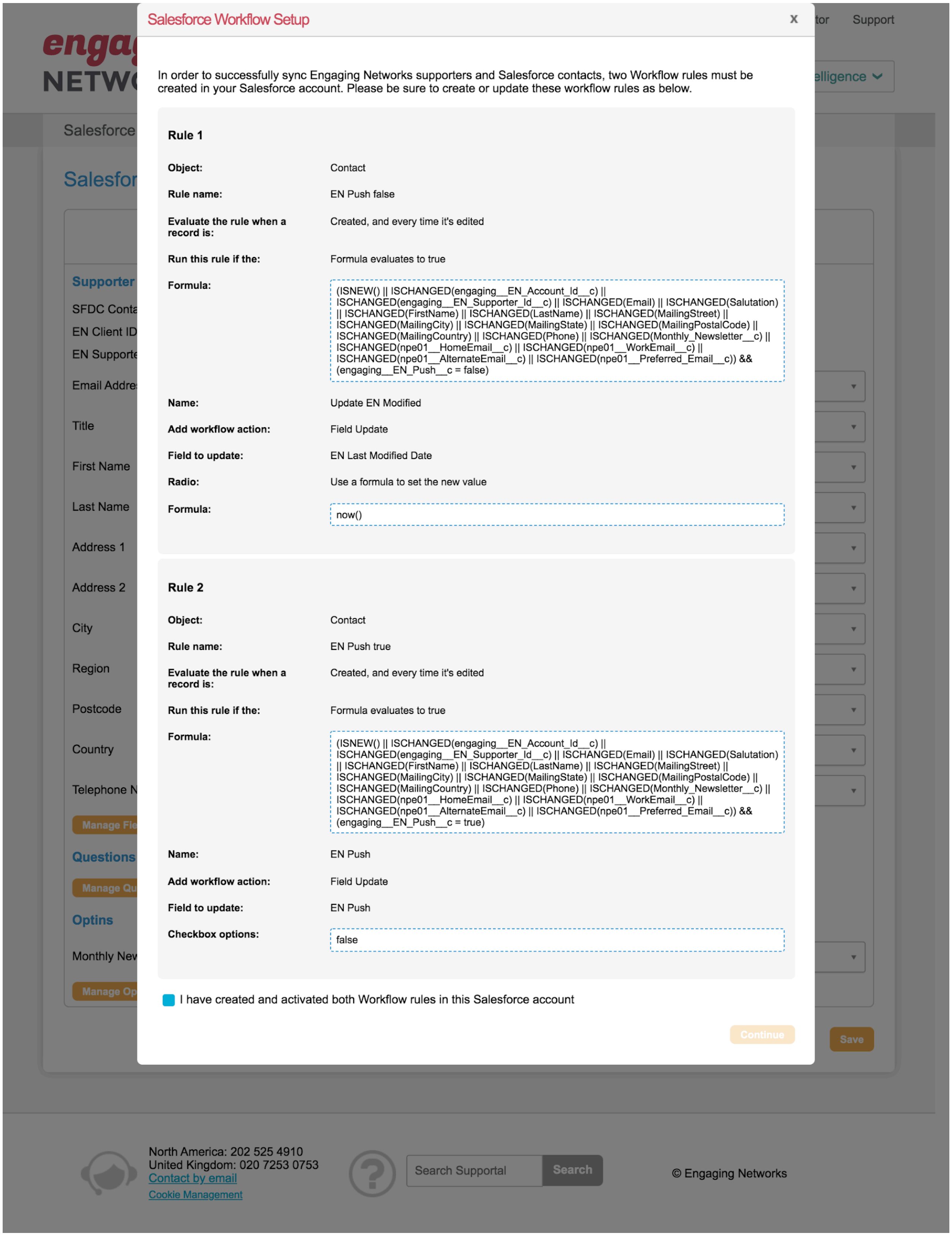
> ⓘ By default Address 1 is mapped to MailingStreet. If a client is using Address 1 and Address 2 fields, please instead map to Contact.“EN Address 1” and Contact.“EN Address 2”. There is a pre-installed trigger on the Contact which extracts the first line of the MailingStreet field to EN Address 1 and the remainder to EN Address 2. Clients can use the Contact MailingStreet as usual and the trigger will handle the separation and concatenation.



> ⓘ Opt Ins should be created as checkbox fields on the Contact. While Salesforce by default offers ‘Opt Out,’ on the Contact record (usually one field), Engaging Networks handles as “Opt In.’ As clients can have multiple Opt Ins, we recommend creating and mapping each Opt In field in Salesforce to reflect the same structure from Supporter to Contact (as the example below).

Engaging Networks	Sync direction	Salesforce
Supporter Fields		**Contact**
SFDC Contact ID		Id
EN Client ID		engaging__Account_Id__c
EN Supporter ID		engaging__Supporter_Id__c
Email Address	BOTH	Email
Title	BOTH	Salutation
First Name	BOTH	FirstName
Last Name	BOTH	LastName
Address 1	BOTH	engaging__EN_Address_1__c
Address 2	BOTH	engaging__EN_Address_2__c
City	BOTH	MailingCity
Region	BOTH	MailingState
Postcode	BOTH	MailingPostalCode
Country	BOTH	MailingCountry
Manage Fields		

On Save, two Flow rules must be created/updated, as per the ‘confirmation’ popup. The Salesforce admin must confirm that the Flow rules have been created and activated in the Salesforce account.


Salesforce Workflow Setup
In order to successfully sync Engaging Networks supporters and Salesforce contacts, two Workflow rules must be created in your Salesforce account. Please be sure to create or update these workflow rules as below.
Rule 1
Object: Contact
Rule name: EN Push false
Evaluate the rule when a record is: Created, and every time it's edited
Run this rule if the: Formula evaluates to true
Formula: (ISNEW() || ISCHANGED(engaging__EN_Account_Id__c) || ISCHANGED(engaging__EN_Supporter_Id__c) || ISCHANGED(Email) || ISCHANGED(Salutation) || ISCHANGED(FirstName) || ISCHANGED(LastName) || ISCHANGED(MailingStreet) || ISCHANGED(MailingCity) || ISCHANGED(MailingState) || ISCHANGED(MailingPostalCode) || ISCHANGED(MailingCountry) || ISCHANGED(Phone) || ISCHANGED(Monthly_Newsletter__c) || ISCHANGED(npe01__HomeEmail__c) || ISCHANGED(npe01__WorkEmail__c) || ISCHANGED(npe01__AlternateEmail__c) || ISCHANGED(npe01__Preferred_Email__c)) && (engaging__EN_Push__c = false)
Name: Update EN Modified
Add workflow action: Field Update
Field to update: EN Last Modified Date
Radio: Use a formula to set the new value
Formula: now()
Rule 2
Object: Contact
Rule name: EN Push true
Evaluate the rule when a record is: Created, and every time it's edited
Run this rule if the: Formula evaluates to true
Formula: (ISNEW() || ISCHANGED(engaging__EN_Account_Id__c) || ISCHANGED(engaging__EN_Supporter_Id__c) || ISCHANGED(Email) || ISCHANGED(Salutation) || ISCHANGED(FirstName) || ISCHANGED(LastName) || ISCHANGED(MailingStreet) || ISCHANGED(MailingCity) || ISCHANGED(MailingState) || ISCHANGED(MailingPostalCode) || ISCHANGED(MailingCountry) || ISCHANGED(Phone) || ISCHANGED(Monthly_Newsletter__c) || ISCHANGED(npe01__HomeEmail__c) || ISCHANGED(npe01__WorkEmail__c) || ISCHANGED(npe01__AlternateEmail__c) || ISCHANGED(npe01__Preferred_Email__c)) && (engaging__EN_Push__c = true)
Name: EN Push
Add workflow action: Field Update
Field to update: EN Push
Checkbox options: false
I have created and activated both Workflow rules in this Salesforce account
Continue
Save
North America: 202 525 4910
United Kingdom: 020 7253 0753
Contact by email
Cookie Management
Search Supportal
Search
© Engaging Networks

How does EN know which Contacts to pull and which Supporters to push?

EN keeps track of the last sync via an internal Last Checked timestamp.

It then compares this timestamp with Contact.engaging__EN_Last_Modified_Date__c to determine which contacts have been changed.

Therefore, it is important to set the two Flow rules correctly.

How does EN reference supporters as Contacts

With the Salesforce integration, Contact Id is being stored alongside the supporter record in Engaging Networks. A new field titled “Contact Id” is populated when Contact information is pushed and pulled from Engaging Networks.

On Contact information being returned back to Engaging Networks, Contact Id is checked first and if a match is found - will update the supporter record. This is a recent update and is currently specific to the Contact sync.

Handling Opt In Questions

When Engaging Networks pushes and pulls Contacts, value replacements will occur to support the different methods both systems handle this relationship.

As “Opt Ins” are either Y or N in Engaging Networks, the following happens in sync.

When Contacts are pushed

BLANK is replaced to FALSE
N is replaced to FALSE
Y is replaced to TRUE

On pull of Contacts back

FALSE is replaced to N
TRUE is replaced to Y

Checkbox fields on the Contact

Engaging Networks allows any value to be retained and the field 'type' on the Default Account Structure mainly helps in Form Block display, on Pages, and under the Lookup Supporters gadget.

Salesforce, however, is stricter and requires Checkbox values to either be TRUE, FALSE, 1 or 0.

If your organization plans to use Checkbox fields in the Contact sync, the respective fields in Engaging Networks must use TRUE or FALSE. This is especially notable when these fields will be answered by supporters on pages. A radio button that either records TRUE or FALSE will help in preventing sync errors from Salesforce.

A use case to take note of, if using Checkbox fields, are new supporters.

When a new supporter is created, any fields not set with data on creation would be blank. If a field is set to PUSH or BOTH on the Contact Mapping - Salesforce would complain as the value is neither TRUE or FALSE.

When Contacts are pushed

BLANK is replaced to FALSE

1, y, Y, true and TRUE are replaced with TRUE

Any other value is replaced with FALSE

On pull of Contacts back

Nothing is replaced. We respect the value being returned from Salesforce.

It is recommended for fields, outside of Opt Ins, that TRUE or FALSE be the value stored in Engaging Networks. For supporter facing fields, please be sure checkboxes are submitting TRUE or FALSE. Using different values will affect account user’s queries, as they could have supporters with different values.

Transaction Mappings

Outside of Contact syncing, another key process of this integration is how to represent supporter's actions from Engaging Networks inside Salesforce.

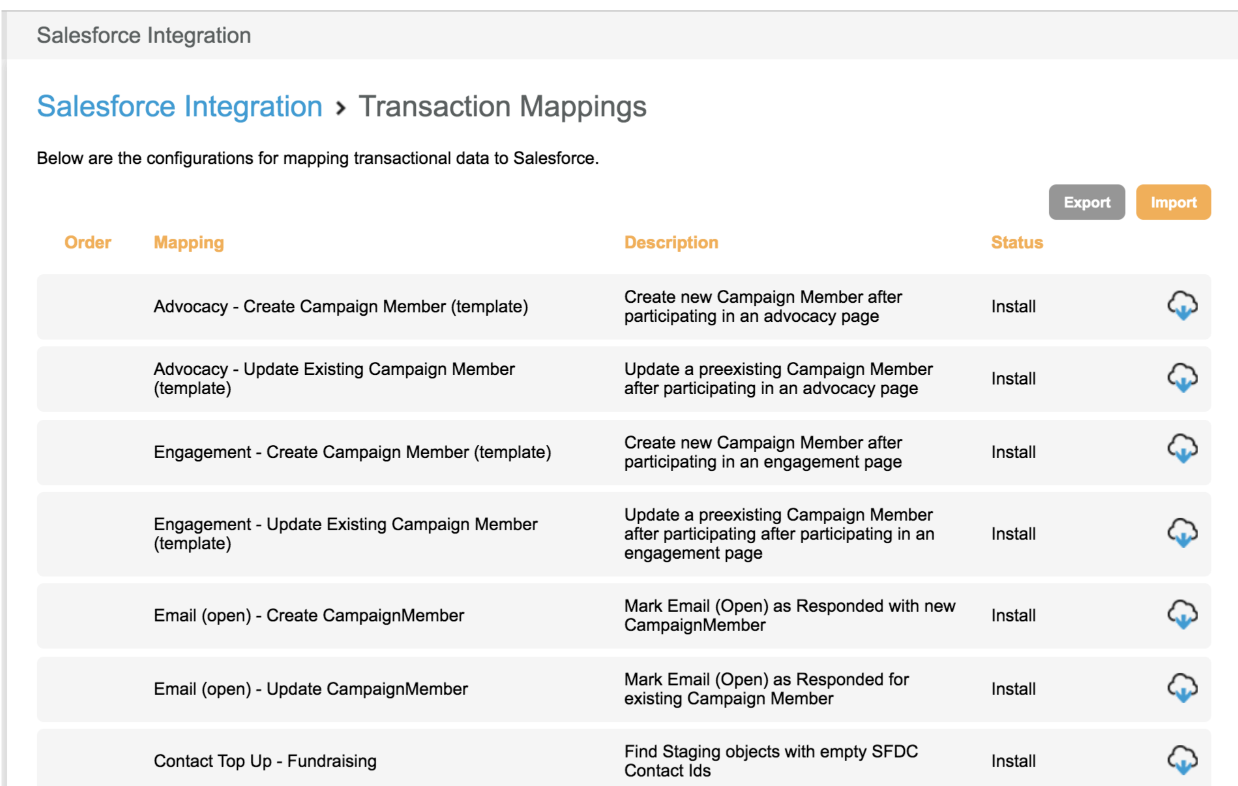
Engaging Networks is initially providing a collection of mappings focussed for clients using the NonProfit Success Pack.

For reference, JSON representations of the mappings can be found at the Engaging Networks GitHub repository : https://github.com/EngagingNetworks/salesforce-connector-mappings

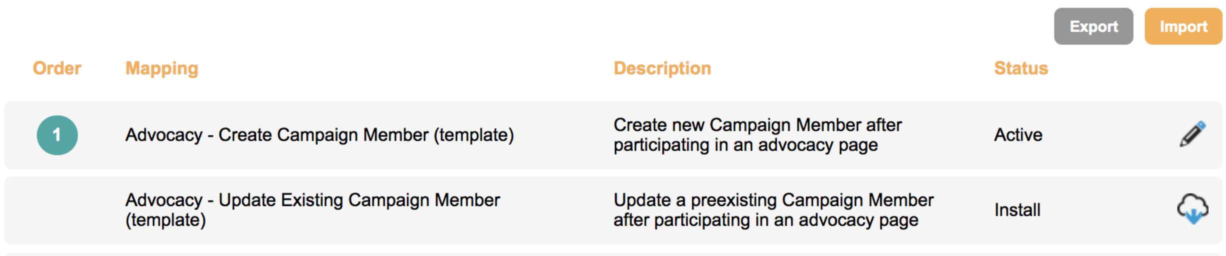
These template mappings are provided as a way to easily set up 'Mapping Rules' to the Engaging Networks Salesforce Connector App.

However, salesforce admins will be happy to know that a lot of flexibility is on offer to either tweak or create custom mapping rules to match business requirements.

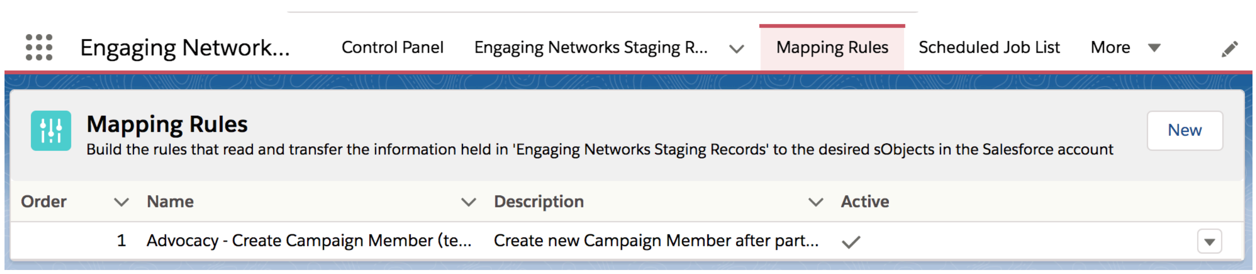
On first access of the Transaction Mapping interface, you will be met with a number of Mappings whose status is 'Install'.



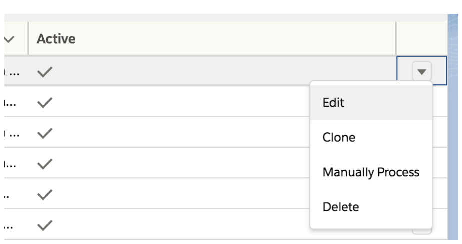
On hitting ‘Install’, Engaging Networks will use Salesforce’s REST APIs to push the respective template to the connected org.



After going through the install process for a mapping, if you head to Salesforce within the Engaging Networks Connector App and look under the Mapping Rules navigation - you will see that the ‘rule’ is now present.



If you click on the down arrow and select Edit (for any mapping), the screen that follows is the actual configuration for this mapping.



It is important to understand that the Transaction Mapping screen in Engaging Networks provides a ‘slimmed down’ interface to Mapping Rules set in Salesforce.

The Engaging Networks Connector App in Salesforce does the work of reading the Mappings Rules and processing the staging objects each day.

Through Engaging Networks, users can only alter the primary mapping fields which transfer information from the staging record to the respective sobject. Altering advanced mapping behaviour, like the query rules or matching rules - must be done inside of Salesforce. In fact you can edit and manage the entirety of the mappings from Mapping Rules.

> ⓘ If an admin deletes a Mappings Rules from Salesforce, Engaging Networks' reference to that Mapping Rules will be deleted as well. *When you load the Transaction Mappings screen, Engaging Networks is actually calling and listing the Mapping Rules held inside Salesforce.*

Once the processing job is scheduled, the Engaging Networks Connector App will process 'Active' mappings, in priority Order.

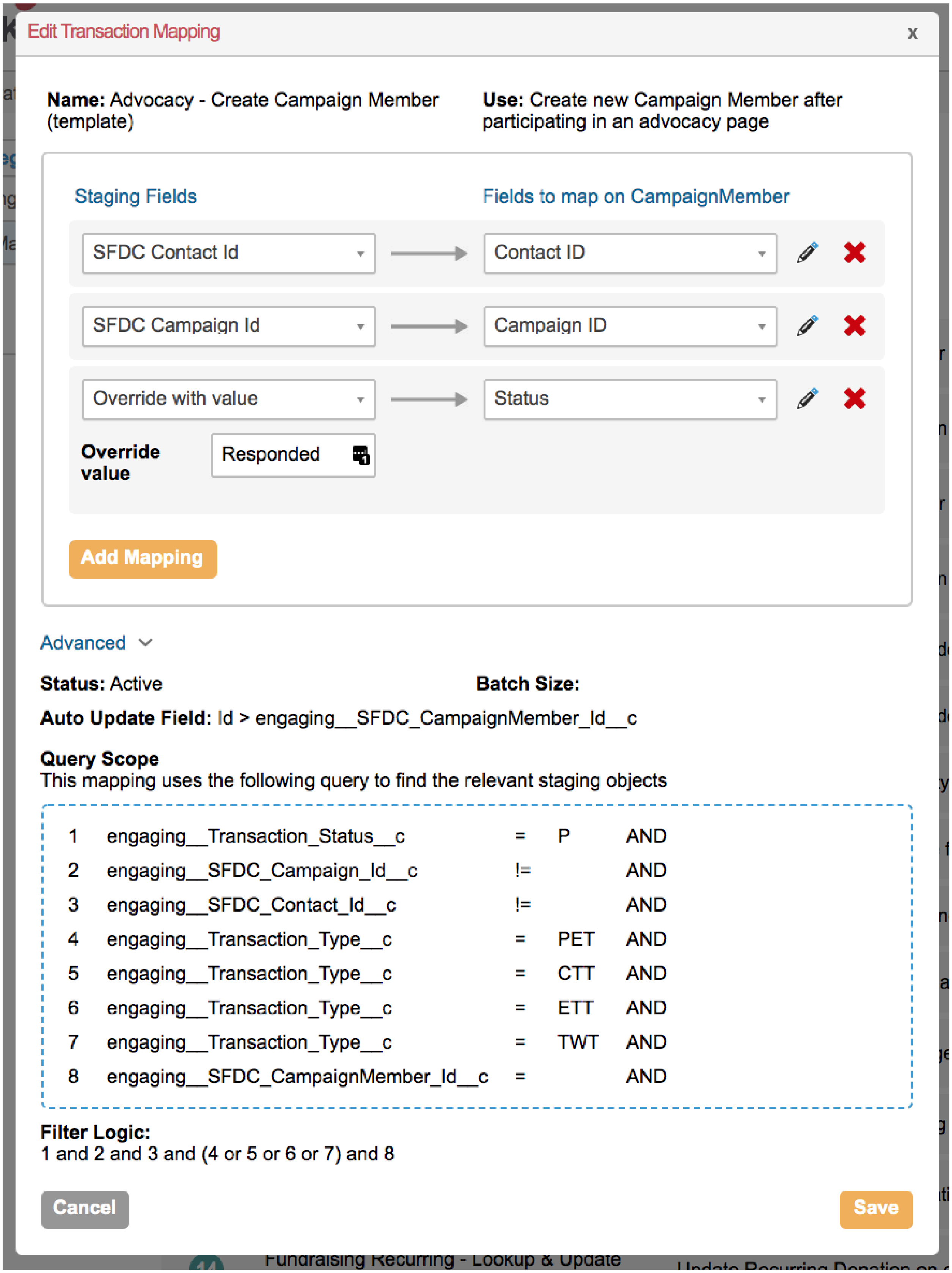
Fundamentally, Mapping Rules tells how data on the staging objects should be referenced in Salesforce.

To explain this process further, we will take a look at the first two mappings.

Advocacy - Create Campaign Member (template)

On installation of this mapping, a screen will show confirmation that it has been installed.

What this particular Mapping Rule does is find staging records, whose Transaction Type is PET, ETT, CTT or TWT which don't have a SFDC CampaignMember Id value present.


Edit Transaction Mapping
x
Name: Advocacy - Create Campaign Member (template)
Use: Create new Campaign Member after participating in an advocacy page
Staging Fields
Fields to map on CampaignMember
SFDC Contact Id
Contact ID
SFDC Campaign Id
Campaign ID
Override with value
Status
Override value
Responded
Add Mapping
Advanced
Status: Active
Batch Size:
Auto Update Field: Id > engaging__SFDC_CampaignMember_Id__c
Query Scope
This mapping uses the following query to find the relevant staging objects
1 engaging__Transaction_Status__c = P AND
2 engaging__SFDC_Campaign_Id__c != AND
3 engaging__SFDC_Contact_Id__c != AND
4 engaging__Transaction_Type__c = PET AND
5 engaging__Transaction_Type__c = CTT AND
6 engaging__Transaction_Type__c = ETT AND
7 engaging__Transaction_Type__c = TWT AND
8 engaging__SFDC_CampaignMember_Id__c = AND
Filter Logic:
1 and 2 and 3 and (4 or 5 or 6 or 7) and 8
Cancel
Save
Fundraising Recurring - Lookup & Update

The expectation is that a page or email has been linked by Campaign Linking and that the Contact has not been added to the Campaign.

This rule creates the CampaignMember from the SFDC Contact Id and SFDC Campaign Id values, off the staging record.

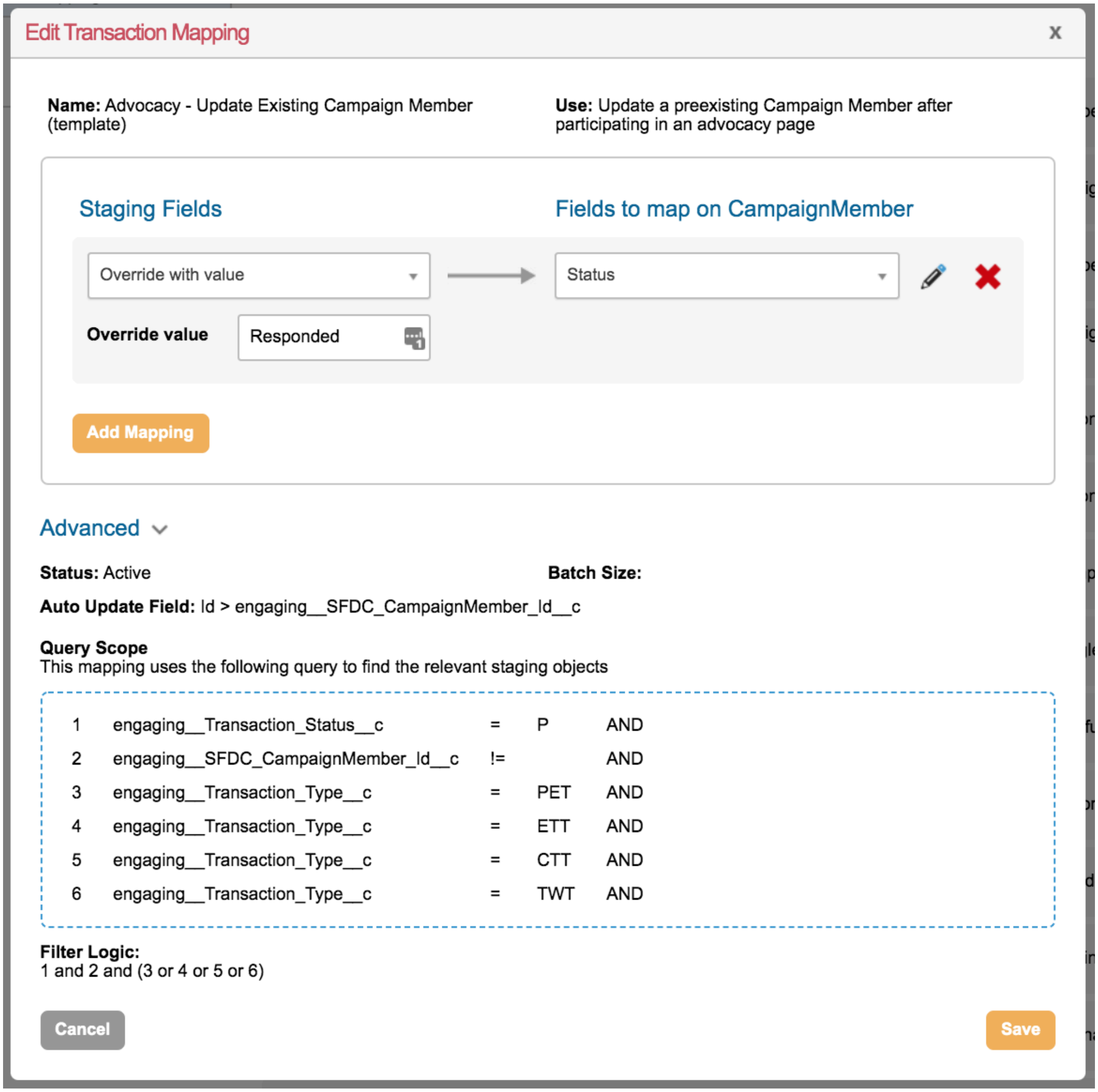
Advocacy - Update Existing Campaign Member (template)

This second Mapping Rule is designed to find staging records, whose Transaction Type is PET, ETT, CTT or TWT which DO have a SFDC CampaignMember Id value present.

The eason why SFDC CampaignMember Id would be present on the staging record is due to a trigger, installed with the package.

If SFDC Campaign Id and SFDC Contact Id are populated, when the staging record is created, a trigger will go and check for an associated CampaignMember. If found, it will populate SFDC CampaignMember Id.

This then allows for this mapping rule to set the CampaignMember's Status to Responded.


Edit Transaction Mapping
x
Name: Advocacy - Update Existing Campaign Member (template)
Use: Update a preexisting Campaign Member after participating in an advocacy page
Staging Fields
Fields to map on CampaignMember
Override with value
Status
Override value
Responded
Add Mapping
Advanced
Status: Active
Batch Size:
Auto Update Field: Id > engaging__SFDC_CampaignMember_Id__c
Query Scope
This mapping uses the following query to find the relevant staging objects
1 engaging__Transaction_Status__c = P AND
2 engaging__SFDC_CampaignMember_Id__c != AND
3 engaging__Transaction_Type__c = PET AND
4 engaging__Transaction_Type__c = ETT AND
5 engaging__Transaction_Type__c = CTT AND
6 engaging__Transaction_Type__c = TWT AND
Filter Logic:
1 and 2 and (3 or 4 or 5 or 6)
Cancel
Save

To recover transactions that failed to push from Engaging Networks to Salesforce during the nightly sync, you will need to export the transactional data from Engaging Networks and populate this data into the Engaging Network Staging Records in Salesforce. Fortunately Engaging Networks provides a variation of the export file (type = sfdc) that is formatted for easy mapping into Salesforce

1. Open the Export dataservice for your data centre:
    1. Dallas Datacentre: https://engagingnetworks.appea-dataservice/export.jsp
    2. Toronto Datacentre: https://e-activist.com/ea-dataservice/export.jsp
2. Enter the following parameters:
    1. Your API token (look this up in Engaging Networks > Account Settings > Tokens) *your api token provides full access to Engaging Networks supporter data and should never be communicated by email or exposed to other users in your organization
    2. Start Date & End Date for missing transactions (note, if there was a failure on Dec 7, it's the prior's day data (Dec 6) that need will be missing in Salesforce)
    3. Type = **sfdc**
3. Submit Form
4. Save the exported CSV file somewhere secure

The next step is to load this data into Salesforce using your favorite importer. The export file works particularly well with Salesforce Workbench or Jitterbit - you will not need to map each column manually because the column names already contain the necessary Salesforce API names.

For workbench:

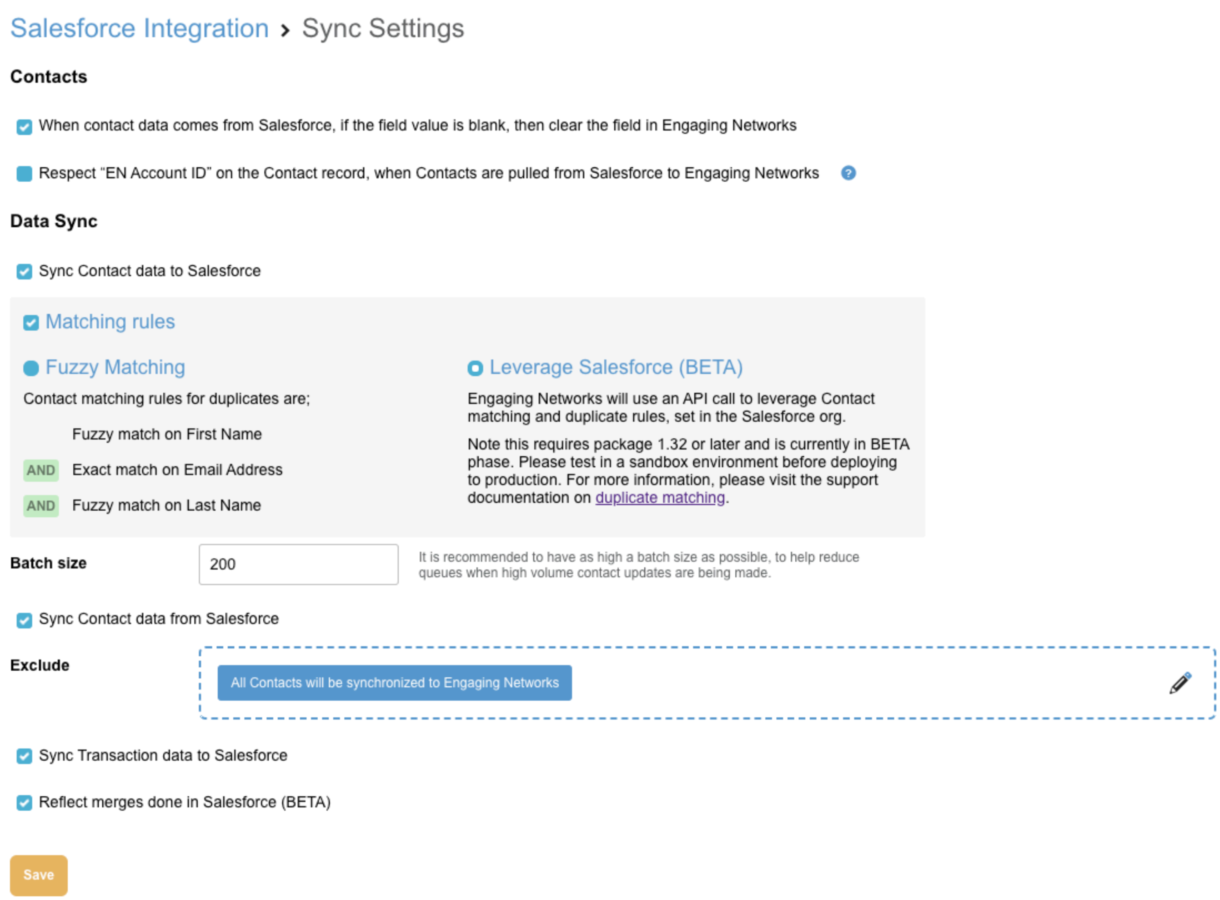
1. Open https://workbench.developerforce.com/login.php
2. Authenticate using your Salesforce username & password
3. Go to Data > Insert
4. Select Object Type: engaging__Engaging_Networks_Staging_Record__c
5. Upload your file & click Next
6. On the next screen, the field mappings should already prepopulate based on the column names in the CSV file. Click Next.
7. Confirm the import

You should see success for all imported records.

Occasionally Workbench may report an error importing the User Agent field due to uniqueness constraints. If you see this, repeat the steps above, but at the field mapping stage (step 6) simply unmap the User Agent field.

Once all missing data has been imported to Engaging Networks Staging Records, it will be processed the next time your Mapping Rules run overnight. If you wish to expedite processing, you can manually run each of your mapping rules, in sequence, from the Mapping Rules tab in Salesforce.

Settings



The settings area, inside Engaging Networks, offers configuration options for the push and pull operations.

When contact data comes from Salesforce, if the field value is blank, then clear the field in

When Contacts are pulled, if a field on the Contact is empty then clear the value in Engaging Networks for the supporter.

A use case that should be taken into consideration are new Contacts, being created in Salesforce, with Engaging Networks already holding data on those supporters.

Working with key stakeholders to have both systems be as close to each other, prior to launch, should reduce these types of errors. Defining user flows between teams will also address how your organization will be working with both systems.

Respect "EN Account ID" on the Contact record

This setting's primary design is to help clients who are running multiple EN accounts into one Salesforce org.

When Contacts are pulled, the Engaging Networks will only pull Contacts whose engaging__Account_Id__c matches the client Id.

This has no relationship with the Account object or householding and for most integrations, will likely be unchecked.

Sync Contact data to Salesforce

Start the job to push supporters as Contacts every 20 minutes.

Upon enabling this sync method, an internal timestamp is configured to the ‘current’ time. Only supporters who are modified after this time will qualify to be pushed.

If you turn off the sync, this timestamp will be cleared. On re-enabling the timestamp will again follow the logic of using the current time.

A use case here is if you wanted to import a large file of supporters into Engaging Networks and not want that data to cause a large job update to Salesforce. You could turn off the sync, import and once the import has completed - re-enable the sync.

Matching Rules (Fuzzy Matching)

Engaging Networks utilizes Salesforce’s Bulk API to upsert supporters as Contacts. If Matching Rules is enabled, when Engaging Network’s receives Duplicate errors returned on the batch being imported - a secondary job will ran to try find suitable Contacts based on the following rules :

Fuzzy match on First Name
Exact match on Email Address
Fuzzy match on Last Name

If a suitable match is found, the Id will be copied to the Contact Id and the supporter record eligible for re-push in the next Contact push.

Matching Rules (Leverage Salesforce)

Engaging Networks utilizes Salesforce’s Bulk API to upsert supporters as Contacts. If Matching Rules is enabled, when Engaging Network’s receives Duplicate errors returned on the batch being imported - a secondary job will run to try to find suitable Contacts based on the following rules.

When the 'Leverage Salesforce' setting is enabled, Engaging Networks utilizes Salesforce's native Matching and Deduplication functionality to identify the correct Contact.

Engaging Networks initiates an API request to Salesforce, based on the Contact mapping field settings. Salesforce then responds with an API response based on the Matching and Deduplication rules configured in the respective Salesforce account. If an Email Address is matched, the supporter and contact are linked together using the top options determined by Salesforce priority score.

It's important for the Salesforce administrator to configure the necessary rules for this functionality to operate accurately. Please refer to the ‘Duplicate Management’ section for guidance on how best to configure the rules within Salesforce.

Batch Size

Define how many rows of data will be pushed in each batch, as Contacts. It is recommended to have as high a batch size as possible, to help reduce queues when high volume contact updates are being made.

If the Batch Size is small and a large update is made across supporters, it may lead to Salesforce API limits being hit.

Sync Contact data from Salesforce

Start the job to pull Contacts every 20 minutes. By default all modified Contacts will be pulled.

‘Exclude’ filter

There is an optional ‘Exclude’ filter, if there is a requirement to not have Engaging Networks pull all Contacts.

Sync Transaction data to Salesforce

Will enable the daily transaction sync to push supporter actions to Engaging Networks Staging Records

Reflect merges done in Salesforce

Engaging Networks will enable a job to review the ‘merge audit’ logs produced by Salesforce, when contacts are manually merged within Salesforce.

This 'merge mirror' job operates concurrently with the Contact 'pull' and 'push' jobs but does not immediately synchronize changes made in Salesforce.

It's important to note that only contacts with a value present in the 'EN_Supporter_Id__c' field, upon being merged, are logged in the audit trail and at present, the merging of two contact records is only supported.

Here is an example of how this functionality works

Supporter A is linked with Contact A
Supporter B is linked with Contact B

Both supporters exist in Engaging Networks and the Contact Ids are correct in both systems.

With the setting enabled, after Contact B is merged into Contact A in SF - a job checks for merges made *since the last check* and then will merge Supporter B with Supporter A.

Additional Setup Items

To help in the management of the Engaging Networks <> Salesforce integration, it is recommended that the following be actioned.

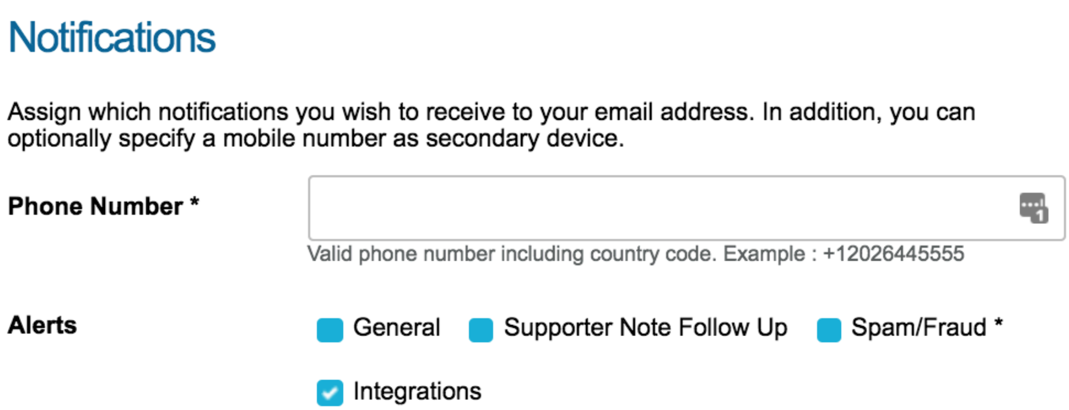
Set SFDC Campaign Id as a Campaign Reference

Under Account Settings, Campaign Reference 6 (the first displayed) should be enabled and labeled SFDC Campaign ID.

See **Campaign Linking** for instructions on implementation.

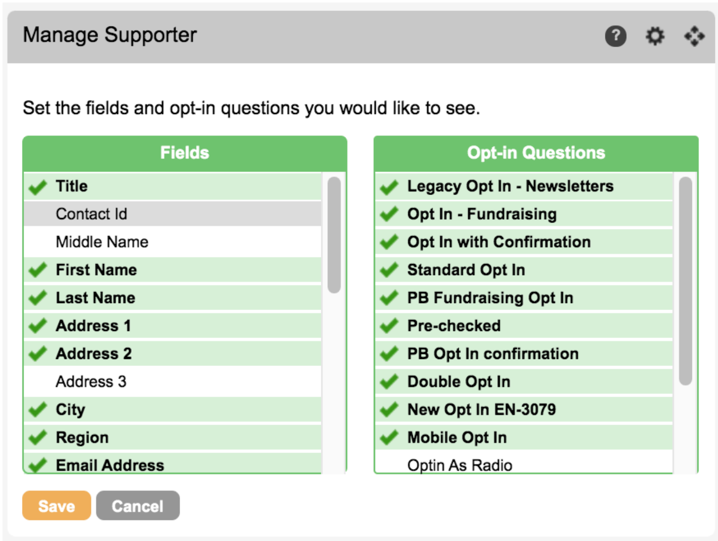
Receive Contacts and Transaction push notifications

To receive email alerts on Contact and Transaction push issues, Inside Engaging Networks and under your User preferences, update the page to have the *Integrations* option checked.



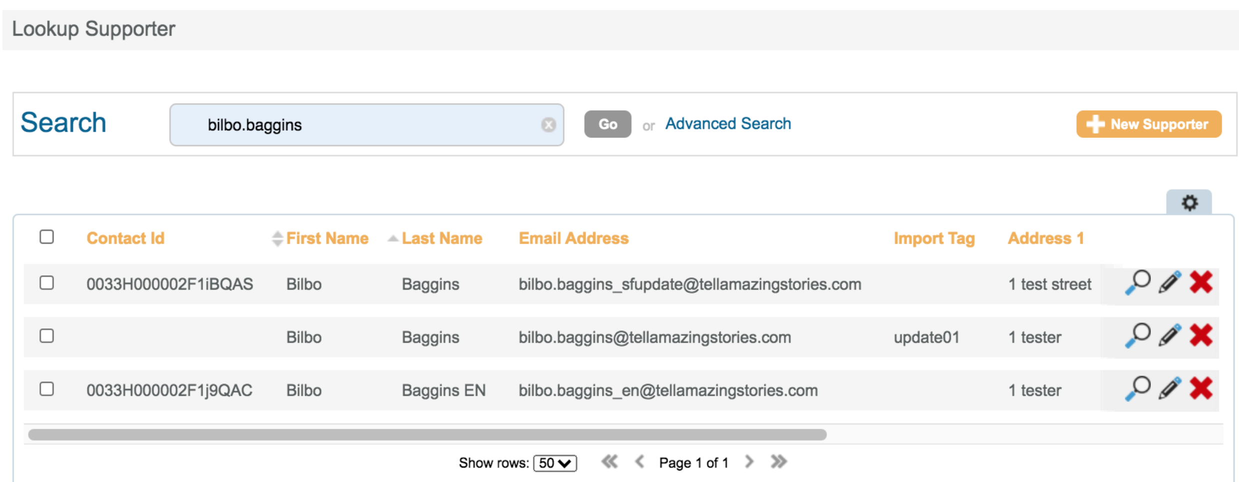
Expose 'Contact Id' under Lookup Supporters

A useful account management addition is to expose 'Contact Id' on the Lookup Supporters > Manage Supporter gadget.



This will allow an Engaging Networks user to view and/or update the Contact Id that references the supporter to Salesforce.

When using the search function Contact Id will be exposed in the first column.



Supporters/Contacts - sync active segments

Before going live, ideally both Engaging Networks and Salesforce are manually synced so that each system is as true to each other as possible, historically speaking.

Clean data will produce a smoother integration and determining which segments will be most active will allow supporters and their transactions to match the right Contacts from the start.

At the time of importing *Contacts into Engaging Networks* or *Supporters into Salesforce*, it is recommended that the data is in good health. This could include personal data, subscription lists, segmentable fields etc.

> Ⓘ It is not a requirement to import all Contacts into Engaging Networks, but consider syncing Contact Ids that have active recurring donations, active advocates/fundraisers and those that are emailed.

> Ⓘ Examine user flows between both systems if all Contacts/Supporters are not going mirrored prior to going live. The Engaging Networks sync offer the ability to ‘Clear’ blank fields coming over from Salesforce. You would not want to ‘wipe’ good data in Engaging Networks due to a ‘new Contact’ in Salesforce updating an existing supporter in Engaging Networks.

It is therefore essential to decide which system is the most up to date for key pieces of data.

For example, a scenario you do not want to action is :

Engaging Networks holds the most recent ‘Opt In’ data for supporters.

An admin exports all Salesforce Contacts and overrides valid ‘Opt In’ data for supporters in Engaging Networks.

This would also be true if the Salesforce admin adds the ‘Opt In’ to the Contact Mapping and Salesforce has not been mirrored, prior to launch. If a Contact is updated in Salesforce, it will be pushed to Engaging Networks and will override valid preferences in Engaging Networks.

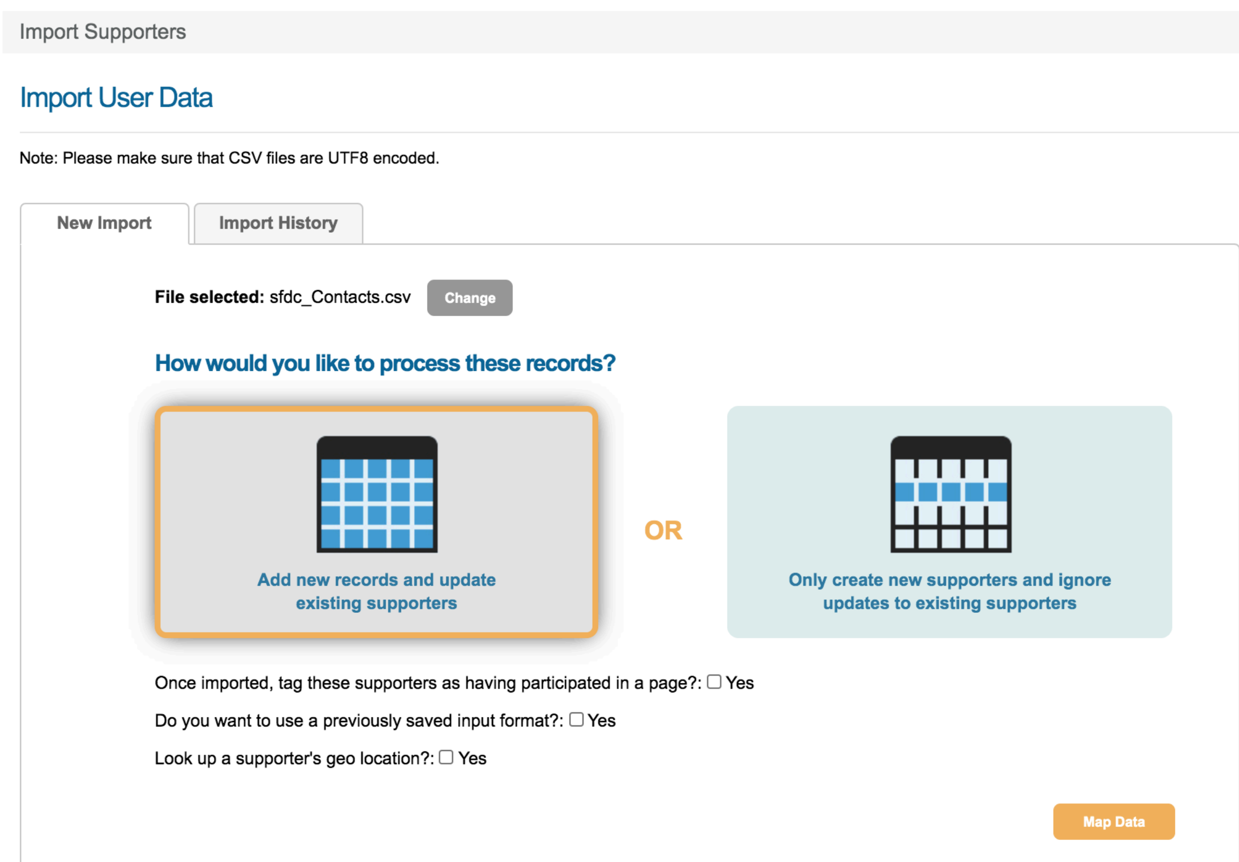
Confirming with key stakeholders in the process as to what data should live in each system is an important milestone.

Export Contacts and Importing in Contact Id

To import Contact information into Engaging Networks, first extract Contacts from Salesforce and ensure *Id* has been included.

	A	B	C	D	E
Name Box		FirstName	LastName	MailingCity	MailingCountry
2	0033H000002EruHQAS	Daphne	Bainter	Bloomfield Township	US
3	0033H000002EruIQAS	Bryce	Whitley	Bay City	US
4	0033H000002EruKQAS	Nelda	Davis	City Of Commerce	US
5	0033H000002EruLQAS	Jon	Mendoza	South San Francisco	US
6	0033H000002EruMQAS	Nilza	Mendoza	South San Francisco	US
7	0033H000002EruNQAS	Zoe	Blum	Pleasant	US
8	0033H000002EruOQAS	Baptiste	Subrahmanya	Arlington	US
9	0033H000002EruPQAS	Sieffre	Subrahmanya	Arlington	US
10	0033H000002EruQQAS	Charlotte	Yudes	Georgetown	US
11	0033H000002EruRQAS	Lara	Yudes	Georgetown	US
12	0033H000002EruSQAS	Concepcion de Jesus	Waterman	Cole City	US
13	0033H000002EruTQAS	Eric	Lauterborn	Cole City	US
14	0033H000002EruUQAS	Kallistrate	Giannino	Marion	US
15	0033H000002EruVQAS	Mattia	Aethelstan	Marion	US
16	0033H000002EruWQAS	Cassius	Guerra	Riverside	US

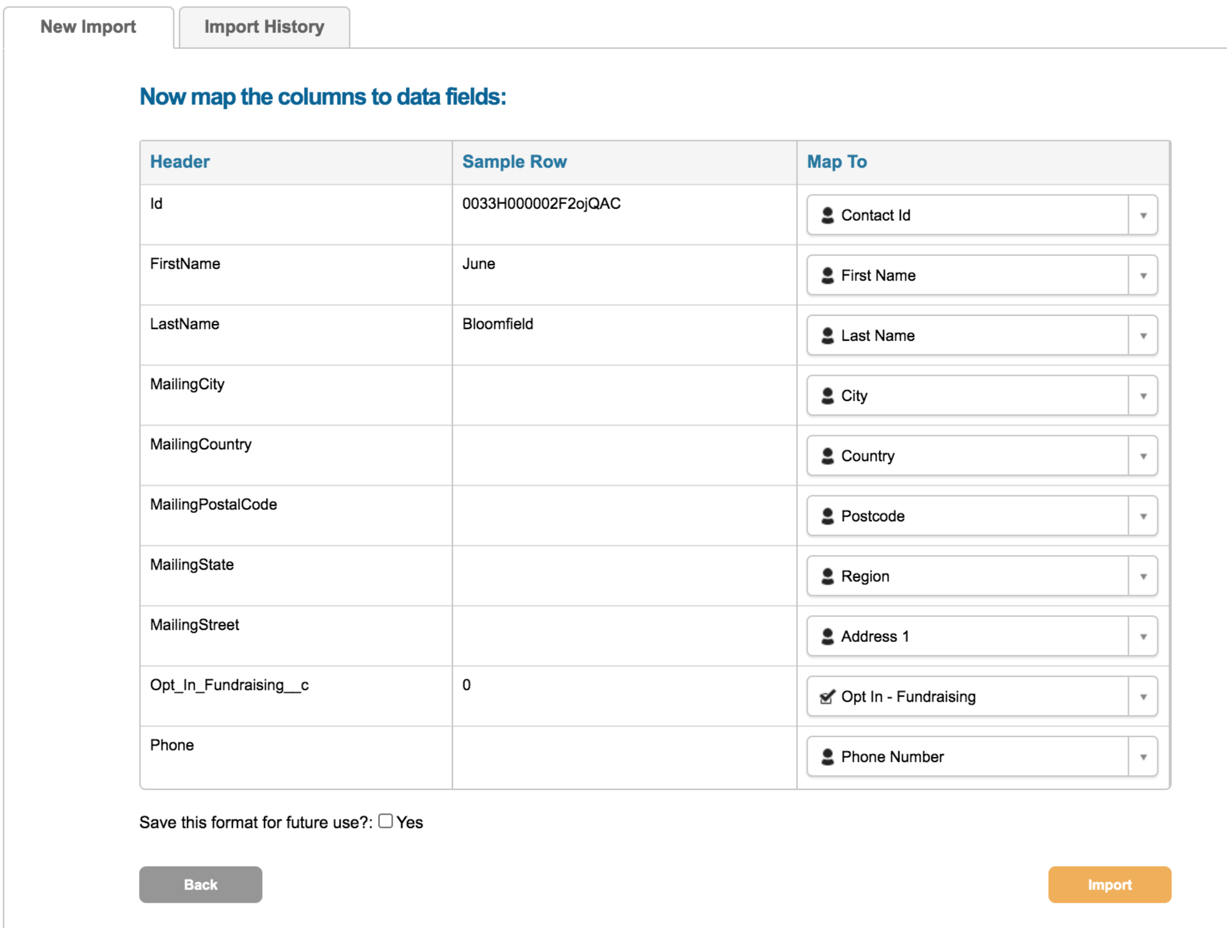
Inside Engaging Networks, head to Data & Reports > Import and select the file.



Next, mapping the headers to the supporters fields.

Map with files header fields with paying close inspection that Id maps with Contact Id.

> ⓘ If you are familiar with the 'legacy' integration - you no longer need to use the non-tagged field called 'SFDC Contact Id'. The new integration provides an internal field to store this reference.



New Import | Import History

Now map the columns to data fields:

Header	Sample Row	Map To
Id	0033H000002F2ojQAC	Contact Id
FirstName	June	First Name
LastName	Bloomfield	Last Name
MailingCity		City
MailingCountry		Country
MailingPostalCode		Postcode
MailingState		Region
MailingStreet		Address 1
Opt_In_Fundraising__c	0	Opt In - Fundraising
Phone		Phone Number

Save this format for future use?: ☐ Yes

Back | Import

After confirming the mapping is correct, clicking Import will trigger the process. When the job has been completed, you can spot check the import by looking up the supporters using Data & Reports > Lookup Supporters.

How to handle historical transactions

Before going live, another important step is ascertaining which data flows need to set up.

Where you are with each system and the modules employed will determine if Campaigns or Recurring Donations need to be created.

> ⓘ At this time, Engaging Networks only transfers transactions made after the 'Transaction Sync' is enabled. Historic transactions will need to be manually transferred to Salesforce if your organization wishes to represent the data.

Two prime examples of this are 'active' campaigns and existing recurring donations.

Active Campaigns

If you are wanting to mark petition (PET) takers as CampaignMembers, then the corresponding Campaign needs to exist in Salesforce. Furthermore, you will need to link the page in Engaging Networks to the Campaign by utilizing the 'Campaign Linking' feature.

When a page is 'linked' to a campaign, staging objects will have both SFDC Contact Id and SFDC Campaign Id populated. With these two values pre-populated, the transaction engine can attach the petition as a CampaignMember.

Recurring Donations

It is useful to keep in mind that Engaging Networks handles recurring donations as follows:

- The initial signup - which is both a commitment and an initial transaction - comes in as an FCR transaction, with no parent identifier in the staging record (Transaction Data 11 = blank)
- With this initial FCR, the Gateway identifier (Transaction Data 2) is the "parent identifier" for all subsequent transactions
- Subsequent transactions (automated charges the next month) come in as FCR transactions, with Transaction Data 11 pointing back to the "parent identifier" provided with the initial transaction

If your implementation has the concept of a "parent commitment" vs "individual/subsequent transactions", then you will need to load parent identifiers for your ongoing recurring donors into Salesforce, so their ongoing (e.g. month-to-month) donations can process properly.

If you are using the default NPSP mappings, this looks as follows:

- Recurring Donations are represented within Salesforce using the NPSP Recurring Donations object. Each transaction (the month-to-month credit card charges) are represented as individual "child" Opportunities under one "parent" Recurring Donation object.
- You need to load the Parent Transaction Id from Engaging Networks into your ongoing, active Recurring Donations in Salesforce, so the ongoing recurring payments can be processed.

If you are new to Engaging Networks: The process is easy. During your Engaging Networks onboarding, the Client Support team will load your credit card tokens into Engaging Networks. When this happens, it will generate "initial" FCR transactions, which the Salesforce connector will pick up (provided it is active) and create fresh Recurring Donation objects for you. No further action is needed.

> ⓘ When the Client Support team imports your credit card tokens during onboarding, the import will generate FCR transactions which look like new recurring donations. This works nicely for initializing the Recurring Donation structure, but also will also create Opportunities that look like real transactions. This can throw off your fundraising totals. Frequently admins will choose to keep the Recurring Donations in Salesforce, but delete the Opportunities that are created as part of this initial import, so you don't have "fake" charges looking like real donations.

If you are an existing Engaging Networks user, new to the Salesforce Connector: The process requires loading the Parent Gateway Id from Engaging Networks into the "EN Parent Transaction Id" field (engaging_npsp__EN_Parent_Transaction_Id__c) on your existing Recurring Donations. You can retrieve the Parent Gateway Ids through the Export tool in Engaging Networks:

1. Data & Reports > Export > New Query
2. Under "Build your Universe", select the fundraising icon, then add "All Donation Pages"
3. Select Payment Type = recurring
4. Run the query, and export in Transactional Format

When you download the file:

1. If using Excel, be sure to ‘Import CSV’ and mark all fields as Text. This will prevent excel automatically altering date and numbers into different formats, than the original file.
2. Delete all rows where Transaction Data 11 is populated (you want just the rows representing initial sign up, where Data 11 is blank)
3. You may wish to do further data work to identify only your *active* recurring donations - this export will contain your full recurring history since onboarding to Engaging Networks. This can be done through a ‘Profile’. Reach out to a supporter representative for further

information.

4. From these remaining rows, load Transaction Data 2 into "EN Parent Transaction Id" on your existing Recurring Donations in Salesforce. (If you do not yet have Recurring Donations in Salesforce - e.g. you are new to Salesforce or haven't used the RD object before - then you'll be generating new Recurring Donation objects instead of loading into existing data. When you create a new RD, ensure likewise that Transaction Data 2 is loaded into the "EN Parent Transaction Id" field.)

Manually Importing Transactions from the Export API

To recover transactions that failed to push from Engaging Networks to Salesforce during the nightly sync, you will need to export the transactional data from Engaging Networks and populate this data into the Engaging Network Staging Records in Salesforce.

Fortunately Engaging Networks provides a variation of the export file (type = sfdc) that is formatted for easy mapping into Salesforce

1. Open the Export dataservice for your data center:
    1. Dallas Datacentre: https://us.engagingnetworks.app/ea-dataservice/export.jsp
    2. Toronto Datacentre: https://ca.engagingnetworks.app/ea-dataservice/export.jsp

2. Enter the following parameters:
    1. Your API token (look this up in Engaging Networks > Account Settings > Tokens) *your api token provides full access to Engaging Networks supporter data and should never be communicated by email or exposed to other users in your organization
    2. Start Date & End Date for missing transactions (note, if there was a failure on Dec 7, it's the prior's day data (Dec 6) that need will be missing in Salesforce)
    3. Type = **sfdc**

3. Submit Form

4. Save the exported CSV file somewhere secure

The next step is to load this data into Salesforce using your favorite importer. The export file works particularly well with Salesforce Workbench or Jitterbit - you will not need to map each column manually because the column names already contain the necessary Salesforce API names.

For workbench:

1. Open https://workbench.developerforce.com/login.php
2. Authenticate using your Salesforce username & password
3. Go to Data > Insert
4. Select Object Type: engaging__Engaging_Networks_Staging_Record__c
5. Upload your file & click Next
6. On the next screen, the field mappings should already pre populate based on the column names in the CSV file. Click Next.
7. Confirm the import

You should see success for all imported records.

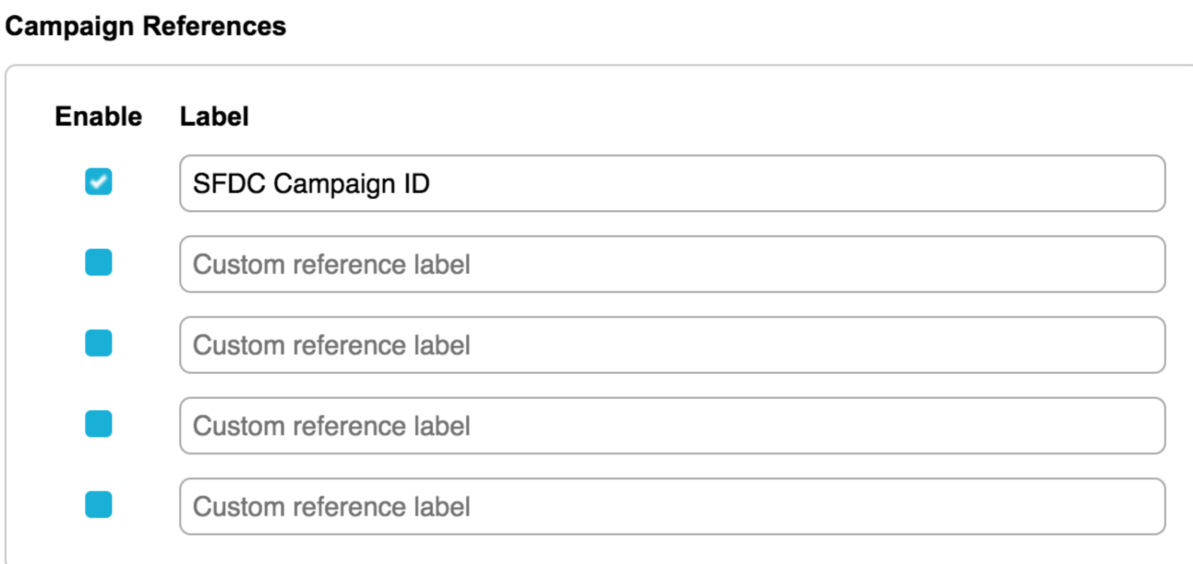
Occasionally Workbench may report an error importing the User Agent field due to uniqueness constraints. If you see this, repeat the steps above, but at the field mapping stage (step 6) simply unmap the User Agent field.

Once all missing data has been imported to Engaging Networks Staging Records, it will be processed the next time your Mapping Rules run overnight. If you wish to expedite processing, you can manually run each of your mapping rules, in sequence, from the Mapping Rules tab in Salesforce.

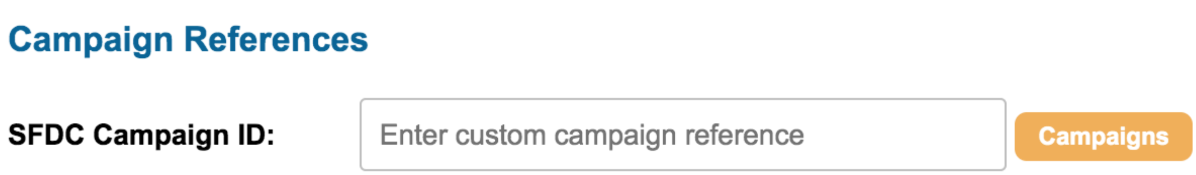
Campaign Linking

To roll up Advocacy or Email responses to Campaign Members, set the respective Salesforce Campaign when building pages and emails in Engaging Networks. The individual page or email can be connected to an existing Salesforce Campaign or created within Engaging Networks directly.

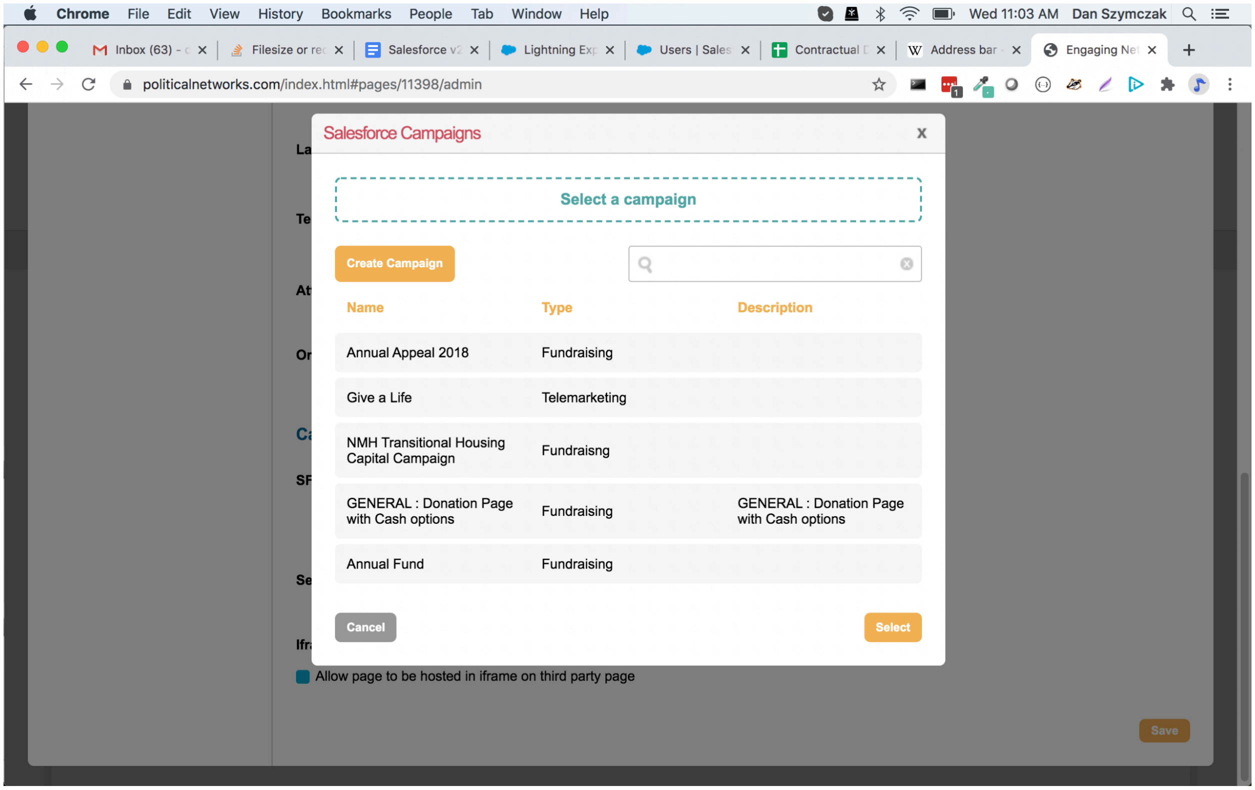
> ⓘ External Reference 6 (Campaign Reference 1) under Account Settings must be enabled and labeled SFDC Campaign ID. A user must have SuperAdmin privileges to do so.



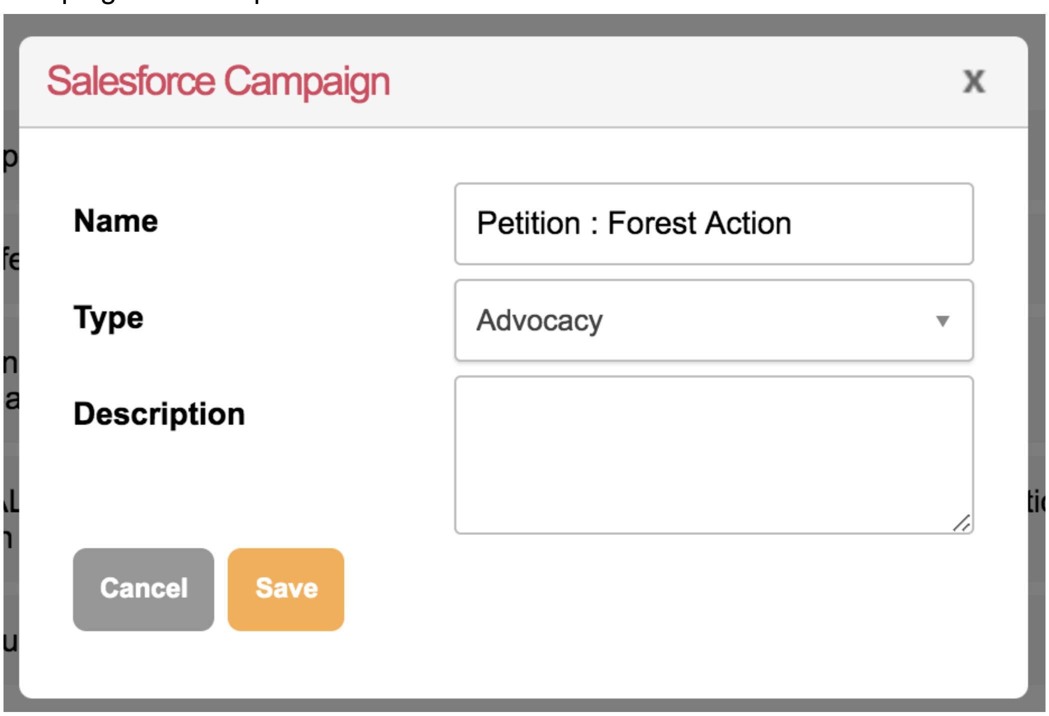
Once enabled, under Page and Email settings, a manage button will appear, which allows the user to create and/or link to the respective Salesforce campaign.



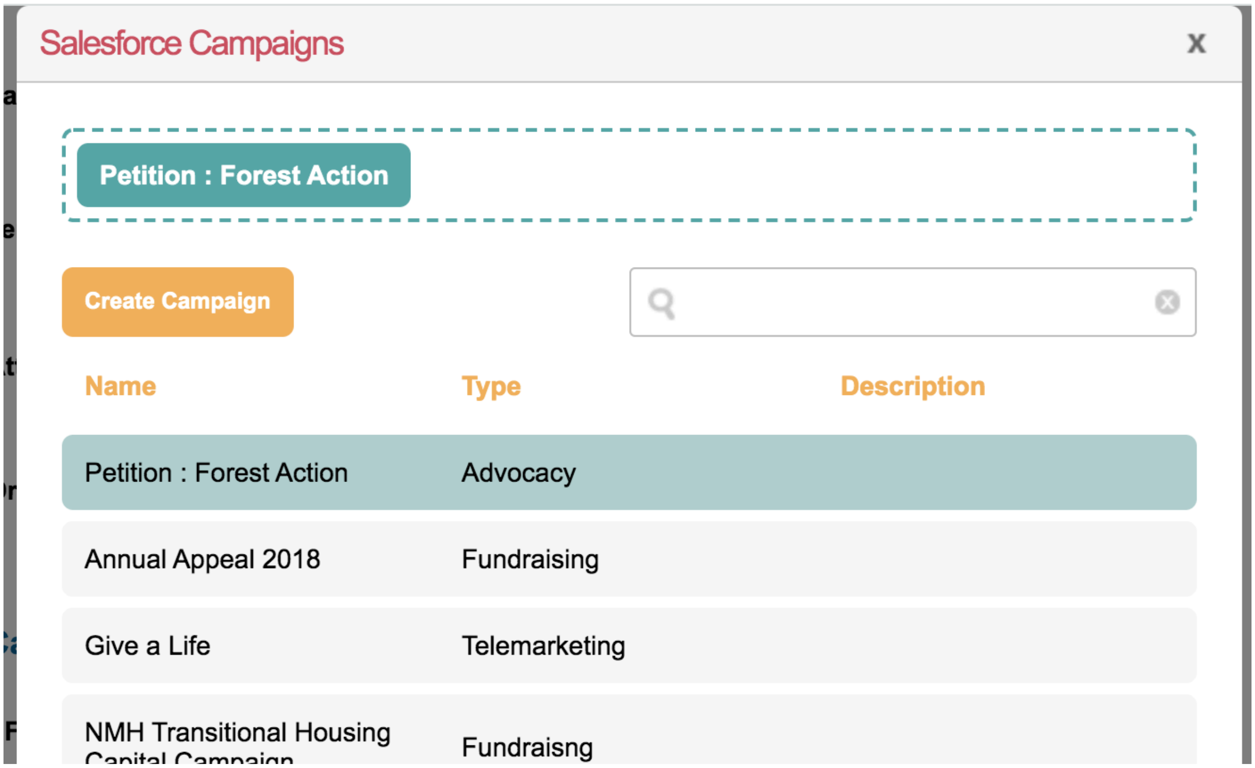
Clicking the **Campaigns** button opens up the layer to manage the Campaign link. Either select an existing campaign or click the **Create Campaign** button if it does not yet exist in Salesforce.



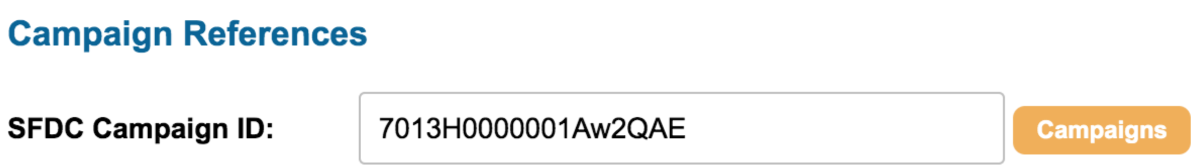
Campaign Create options:



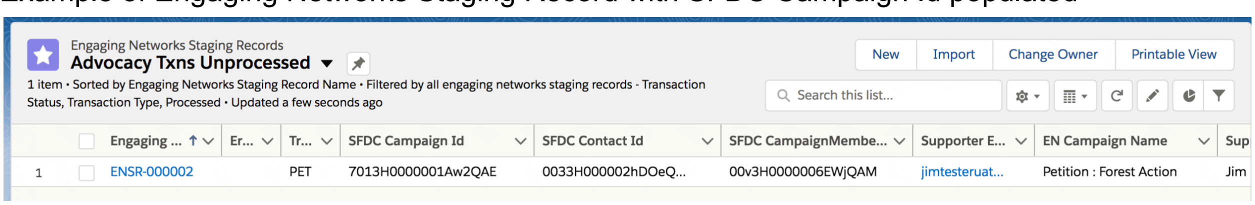
Once created, the campaign will appear at the top of the list. Click on the intended campaign name and click the **Select** button.



This then populates the campaign reference in Engaging Networks with the Salesforce Campaign's ID value.



Example of Engaging Networks Staging Record with SFDC Campaign Id populated



SFDC CampaignMember Id

There is a pre-set trigger which lookups the CampaignMemberId, based on if SFDC Campaign Id and SFDC Contact Id are populated on Engaging Networks Staging Record creation.

Contact Syncing

Engaging Networks keeps track of which supporters require syncing via an internal 'last modified' timestamp.

Engaging Networks then compares Contacts that have been altered, after this timestamp, against EN Last Modified Date on the Contact.

In order for the Contact sync to work effectively, two Flow rules must be managed that allow Engaging Networks to be able to pull and push Contacts in the correct manner.

Contact Push

Each hour, Engaging Networks will push supporters who have been altered since the last push.

> ⓘ Only supporters with a Last Name will be pushed, in respecting Salesforce's minimum Contact requirements.

Duplicate Management

Engaging Networks utilizes Salesforce's Bulk API to upsert supporters as Contacts.

There are two options for how Engaging Networks finds the respective Contacts, configured under Sync Settings in Engaging Networks: 'Fuzzy Matching' or 'Leverage Salesforce'. For more information, please refer to 'Sync Settings'.

If a suitable match is found, the Id will be copied to the Contact Id, and the supporter record will be eligible for re-push in the next Contact push.

If you have additional Duplicate Rules configured in your Salesforce org (for example, matching rules that look at Phone Number or Street Address), these rules can cause problems for the Contact Sync which supports First Name + Last Name + Email only. We recommend:

- if possible for your situation, set any additional duplicate rules to "Report" instead of "Alert + Report"
- otherwise, set conditions on those duplicate rules using the "Current User" filter, so the rules do not apply to the EN integration user

These settings allow Engaging Networks to lookup Contacts on receiving the following errors examples :

FIELD_CUSTOM_VALIDATION_EXCEPTION:Failed to create Account for Contact Raya Tester. Duplicate Alert:-

"FIELD_CUSTOM_VALIDATION_EXCEPTION:Failed to create Account for Contact Jim Tester. Use one of these records?:--"

FIELD_CUSTOM_VALIDATION_EXCEPTION:A record with this email address already exists.:Email --

For initial integrations, be sure that 'active' Contact segments are brought over to Engaging Networks, prior to launch. This will reduce the need for Engaging Networks creating new Contacts.

Preferred Email, Personal Email, Work Email or Alternate Email?

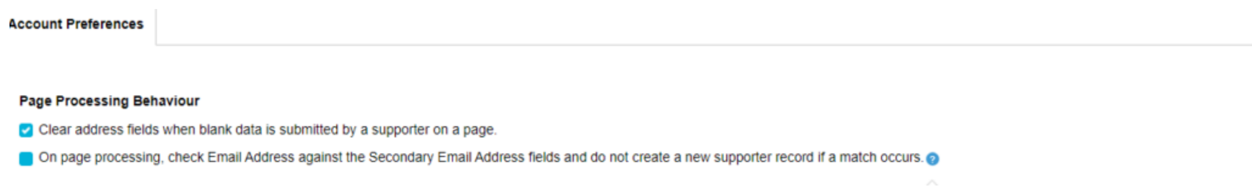
It is important to note that Engaging Networks' unique identifier is the Email Address.

Currently, our integration model maintains a one-to-one representation of Supporters to Contacts.

Supporting a single Contact with multiple email addresses linked to *different* supporters in Engaging Networks isn't feasible, as the Contact Id serves as a unique identifier within the Engaging Networks Salesforce sync process. This ensures that updates to the Email Address on the Contact are reflected in Engaging Networks.

If your organization stores multiple email addresses on a Contact, Engaging Networks can support **up to two** with an account setting to aid management.

Under Account Preferences, there's a setting titled 'Check Primary and Secondary Email address on Page Processing.'

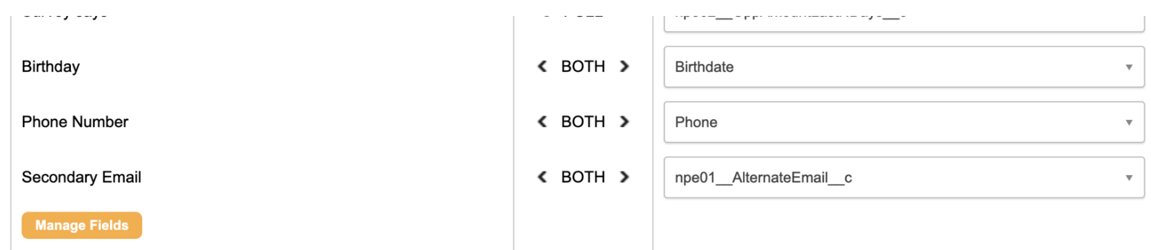


If this setting is enabled, during on-page processing, the system will check whether the email address provided is found in either the primary and/or secondary email address field. If a match is found, no supporter record will be created.

If the email address is found in either of these fields, the existing supporter record will be retained.

The email address used in the submission will be the one that receives the auto-responder. In Salesforce, the Contact ID will remain unchanged, and a new Contact will not be created, ensuring that the Contact retains both email addresses.

When using this setting, make sure to specify the 'Secondary Email' field in the Contact Mapping settings in Engaging Networks to correspond with the field on the Contact record that contains the alternate email address.



A caveat to this setup is that only when using the Marketing Tools to send bulk email out to supporters, only the Primary Email address would deliver email. The Secondary Email address would not send a copy or version of the email.

Contact Pull

Engaging Networks will pull Contacts whose *EN Last Modified Date* has been modified since the last ‘pull’ has occurred.

ⓘ There are two Flow rules that require setup to help with this process.

Contact Id Lookup

A unique addition to the Salesforce sync is on import, Engaging Networks first utilizes the Contact's Id to check for existing supporters. If a match is found, the supporter will be updated.

A good use case for this use is a Contact Email update.

Supporter A and Contact A are linked and have the email address test@gmial.com

Updating Contact A's email address to test@gmail.com, will update Supporter A's email address in Engaging Networks.

Engaging Networks see Email Address as the unique identifier.

If Contact B does not yet exist in Engaging Networks (or Contact Id does not match an existing supporter) then their Email Address will be used as the next identifier.

Merging Supporters and Contacts

Automatic merging to Engaging Networks from Salesforce can be facilitated by enabling the 'Reflect merges done in Salesforce' setting under Sync Settings.

Please note that a maximum of manually merging two Contacts is currently supported, and your account must be running a package higher than version 1.32. Merges done inside Engaging Networks will not be reflected as Salesforce is seen as the database of record.

For manual merges outside of this setting, it's advisable to first merge supporters in Engaging Networks and then merge the corresponding Contacts in Salesforce. It's crucial to ensure that the correct Contact Id and Supporter Id is retained on the Engaging Networks supporter's record.

Common Errors

"INVALID_CROSS_REFERENCE_KEY:invalid cross reference id:--"

The supporter in Engaging Networks has an invalid Id stored in Contact Id. Clear out the Contact Id via Lookup Supporters or replace with valid Id from Salesforce.

"FIELD_CUSTOM_VALIDATION_EXCEPTION:Failed to create Account for Contact Jim Tester. Use one of these records?:--"

On trying to create a supporter in Salesforce, via the API, duplicate matching has been prevented due to a similar supporter being present.

For initial integrations, be sure that ‘active’ Contact segments are brought over to Engaging Networks, prior to launch. This will reduce the need for Engaging Networks creating new Contacts.

Integration Checklist

Core Salesforce Tasks

- [ ] Complete Client Academy course on the Engaging Networks Salesforce Connector
- [ ] Determine Engaging Networks Connector Go Live Date
- [ ] (Recommended) Set up Salesforce sandbox to test contact sync and transaction mappings
    - Note: All changes will have to be deployed and mappings will have to be copied or imported into Production prior to EN Connector go-live

Configure EN-SF Connector

- [ ] Install the Engaging Networks Connector App in Salesforce
    - Supportal article
- [ ] (If using NPSP Recurring Donations or NPSP Enhanced Recurring Donations) Install the NPSP Extension Package
    - Supportal article
- [ ] Apply the "Engaging Networks Connector Administrator" Permission Set to the System Admin or other relevant user
    - Supportal article
- [ ] Connect the Connector to the Salesforce instance from Engaging Networks (Data & Reports > Integration > Salesforce)
- [ ] Set Up duplicate and matching rules in Salesforce
- [ ] (If you do not wish to sync all contacts to Engaging Networks) Identify the criteria that will exclude a subset
    - You can exclude these contacts using a field if applicable. You may have to create a formula field in Salesforce if there are multiple criteria.
    - Supportal article
- [ ] Configure Contact Mapping in Engaging Networks.
- [ ] Create the required Flow rules in your Salesforce instance
    - Supportal article
    - This step needs to be completed when you turn on the Connector sync and every time you update the Contact mappings.
- [ ] Install desired Transactional Mapping packages from Engaging Networks.
- [ ] Customize or create mapping rules via the Engaging Networks Connector app > Mapping Rules in Salesforce
    - Supportal article

EN-SF Connector Go-Live Tasks

- [ ] (If previously tested with a Salesforce Sandbox) Import an empty value into Contact ID field into Engaging Networks
- [ ] (If previously tested with a Salesforce Sandbox) Install connector in production and copy all configuration settings to production
    - Via change set for all profile permissions, new and adjusted fields, page layouts, flows, duplicate/matching rules, and EN Mapping Rules
- [ ] Turn on "Sync Contact data from Salesforce" via EN settings
- [ ] (If applicable) Set exclusion field(s)
    - (eg. Exclude from EN Sync = true)
    - Supportal article
- [ ] Force the connector sync from Salesforce to EN to initialize databases
- [ ] Once contacts have been initialized to Engaging Networks, turn on the rest of the sync
- [ ] Schedule EN-SF Connector app jobs to run in Salesforce
    - Find this in the EN Connector app in Salesforce under the tab "Scheduled Job List."
    - Process Mapping Rules should run daily after 4:00 am EST

Additional Salesforce Items/Considerations (Optional but recommended)

- [ ] Set SFDC Campaign Id as a Campaign Reference.
    - Under Account Settings, Campaign Reference 6 should be enabled and labeled SFDC Campaign ID.
    - Supportal article
- [ ] Include SFDC Campaign ID value for recurring tokens import process
- [ ] Set up notifications for users who should receive emails regarding the Salesforce sync
    - Supportal article
- [ ] Set Contact ID as a visible field on Supporter Lookup
    - Supportal article

Nonprofit Cloud (NPC) Integration

Nonprofit Cloud (NPC) is a fundraising CRM framework built by Salesforce specifically for nonprofit organizations. The Engaging Networks Salesforce Connector allows data to sync seamlessly into environments that utilize NPC and Salesforce Person Accounts. This ensures that the system correctly identifies and maps Contact IDs for Person Accounts and accurately reflects record merges between the two systems.

JSON representations of the NPC-specific mappings can be found at the Engaging Networks GitHub repository: https://github.com/EngagingNetworks/salesforce-connector-mappings

Mappings can then be installed through the Engaging Networks dashboard, under Transaction Mappings.

Set Up steps

Verify Package Version: Ensure your Salesforce organization is running Connector package version 1.4 or later. This version is a prerequisite for NPC and Person Account support.

Duplication Rules

When configuring Matching Rules and Duplication Rules in Salesforce to work with the Contact sync, set up the rule to compare Contact to Person Account. Contact to Contact rules will not trigger a duplicate alert.

Add Fields

Label	**API Name**	**Field Type**	**Object**	**Additional**	**Description**
EN Parent Tracking Value	EN_Parent_Tracking_Value__c	Text(255)	Gift Commitment		Field to capture Tracking Value for first gift in a recurring series
EN Parent Transaction Id	EN_Parent_Transaction_Id__c	Text(255) (External ID) (Unique Case Sensitive)	Gift Commitment		Field to capture Transaction Id for first gift in a recurring series. Used for subsequent gifts to look up Gift Commitment
EN Parent Transaction Id	EN_Parent_Transaction_Id__c	Text(255)	Gift Commitment Schedule		Field to capture Transaction Id for first gift in a recurring series. Used for subsequent gifts to look up Gift

					Commitment Schedule
End Date is Blank	End_Date_is_Blank__c	Formula (Checkbox)	Gift Commitment Schedule	ISBLANK(EndDate)	Is true if End Date is blank for use in identifying open Commitment Schedules by the Engaging Networks Connector
EN Tracking Value	EN_Tracking_Value__c	Text(255)	Gift Transaction		Field to capture Tracking Value from EN on the gift transaction record
EN Transaction Id	EN_Transaction_Id__c	Text(255) (External ID) (Unique Case Sensitive)	Gift Transaction		Field to capture unique Id from EN on the Gift Transaction record
Percent	Percent__c	Formula (Percent)	Engaging Networks Staging Record	1	Percentage formula used to update the percent value on the designation record
SFDC Commitment Schedule Id	SFDC_Commitment_Schedule_Id__c	Text(18)	Engaging Networks Staging Record		Stores Salesforce Id for updated or created record
SFDC Gift Commitment Id	SFDC_Gift_Commitment_Id__c	Text(18)	Engaging Networks Staging Record		Stores Salesforce Id for updated or created record
SFDC Gift Designation Id	SFDC_Gift_Designation_Id__c	Text(18)	Engaging Networks Staging Record		Stores Salesforce Id for updated or created record
SFDC Gift Transaction Designation Id	SFDC_Gift_Transaction_Designation_Id__c	Text(18)	Engaging Networks Staging Record		Stores Salesforce Id for updated or created record
SFDC Gift Transaction Id	SFDC_Gift_Transaction_Id__c	Text(18)	Engaging Networks Staging Record		Stores Salesforce Id for updated or created record
SFDC Old Commitment Schedule Id	SFDC_Old_Commitment_Schedule_Id__c	Text(18)	Engaging Networks Staging Record		Field to record the Id of the Commitment Schedule to be closed if a change is made.
SFDC Outreach Source Code Id	SFDC_Outreach_Source_Code_Id__c	Text(18)	Engaging Networks Staging Record		Stores Salesforce Id for updated or created record
SFDC Person Account Id	SFDC_Person_Account_Id__c	Text(18)	Engaging Networks Staging Record		Stores Salesforce Id for the Person Account identified using the SF Contact Id
Transaction Date	Transaction_	Formula	Engaging	engaging__Tr	Calculates transaction

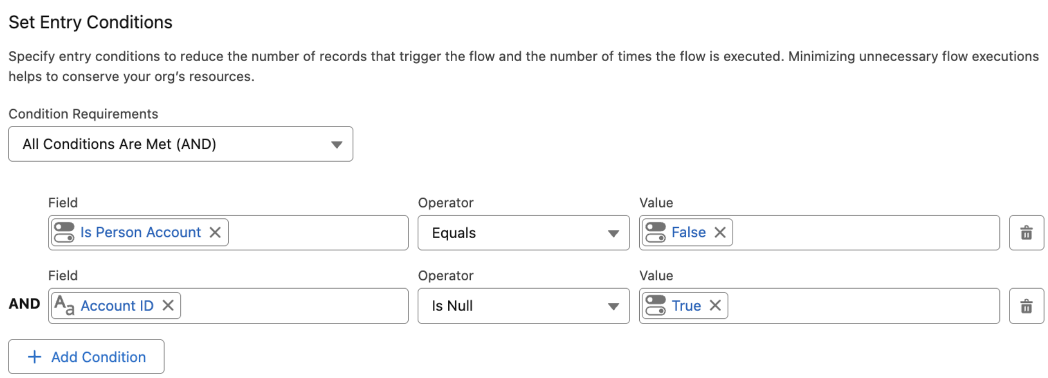
+1	Date_1__c	(Date)	Networks Staging Record	ansaction_Date__c + 1	date + 1

Flows to add

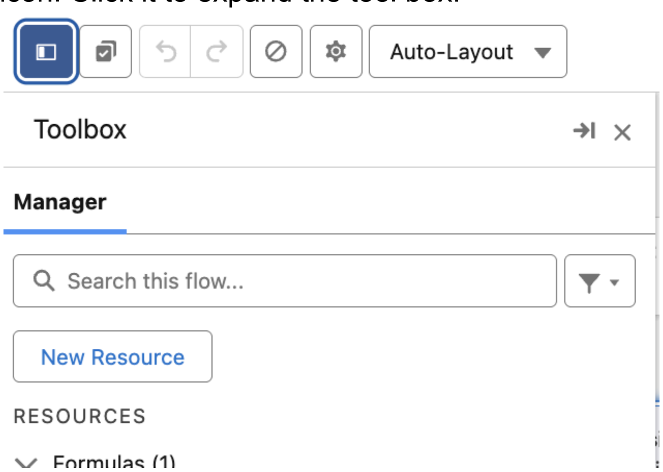
Contact - Convert to Person Account

Purpose: When a contact is loaded from the EN Contact Sync, it may not be converted to a Person Account automatically. If this occurs in your org, adding this Flow will create a Person Account and assign the Contact.

1. In Salesforce, navigate to Flows.
    a. Select New Flow.
    b. Choose Triggered Automations.
    c. Choose Record-Triggered Flow.
2. In Configure Start:
    a. Object: Contact
    b. Configure Trigger: A record is created
    c. Entry Conditions:

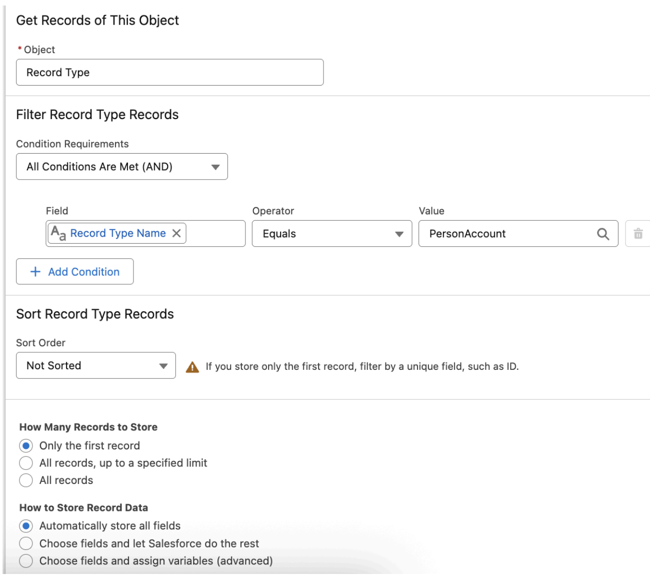


    d. Optimize Flow for Actions and Related Records
3. First, we'll configure one variable and one formula. On the left side there is a toolbox icon. Click it to expand the tool box:

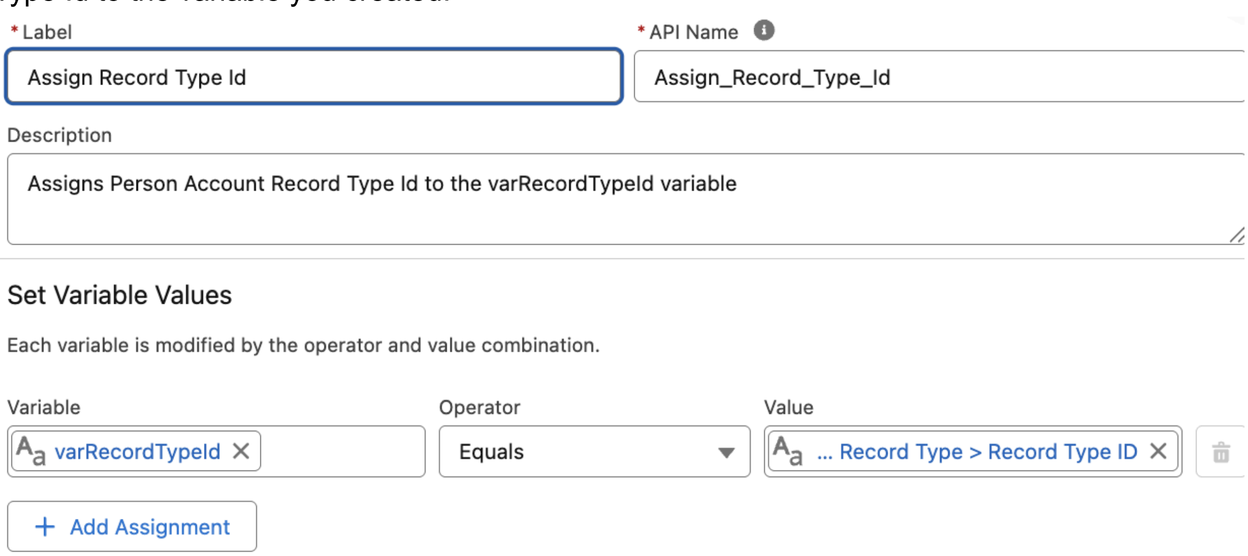


   a. Click new resource. Select Variable. Name it varRecordTypeId, and set the Data Type to Text. All other information can remain blank. Click Done.
   b. Click new resource. Select Formula. Set API name to textName. Set Data Type to Text. Paste this formula: {!$Record.FirstName} & " " & {!$Record.LastName}

4. Navigate back to the Flow and select the plus sign under the Start elemet to add a Get Records element. We are going retrieve the Record Type for Person Accounts. Set the label, name and description as necessary. Copy the setting below, substituting the value for whatever the Person Account Record Type Name is in your organization.



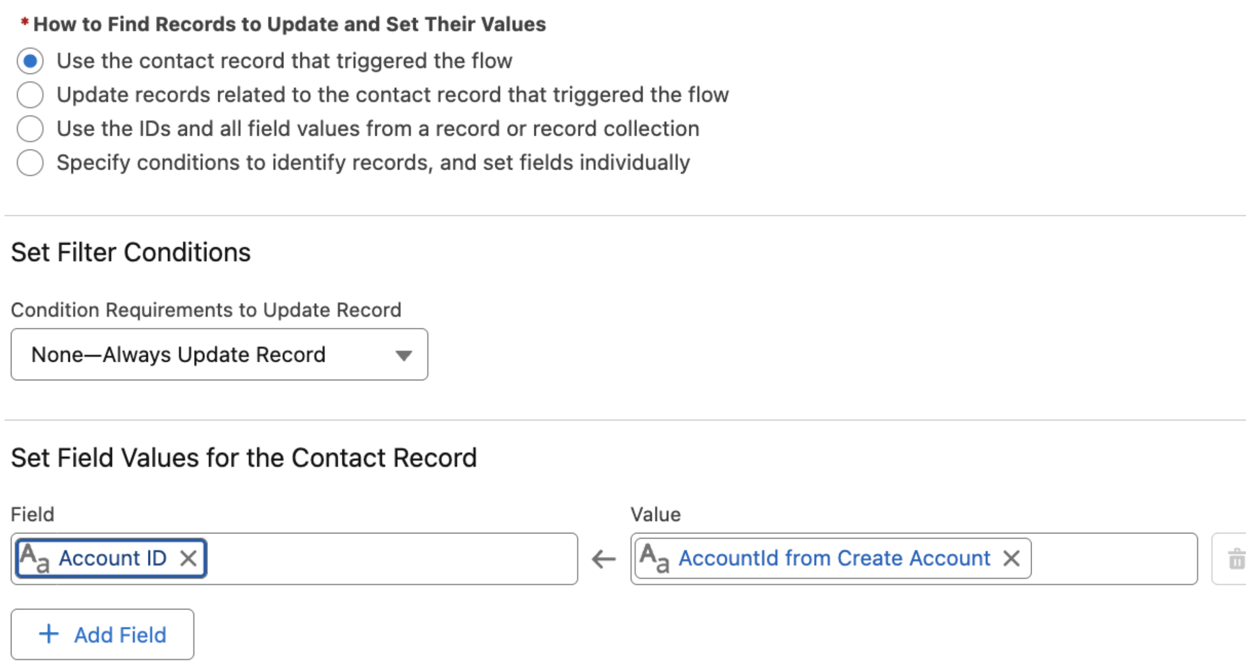
5. Add a new assignment element with the plus button. We'll assign the retrieved Record Type Id to the variable you created.



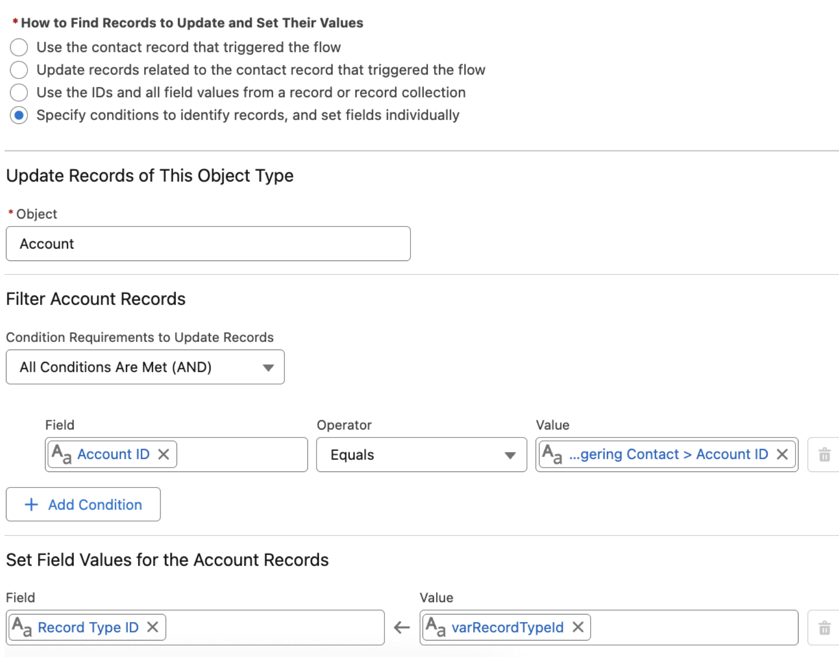
6. Select the plus sign to add a Create Records Element. We'll create the Account that will be the Contact's Person Account. Create the object and map the textName variable to the Account Name field. That is the only required mapping at this point, as once this is a Person Account all Contact values will be available on the Person Account record.

NOTE: You can use this opportunity to copy over any fields to any Account-specific fields - eg. if you'd like to capture the mailing address on an Account specific field, in addition to the Person Account fields.

7. Select the plus sign to add an Update Records element. We first need to assign the new account to the contact.



8. Select the plus sign underneath the Update Contact element to add another Update Records Element. We are going to change the Record Type of the Account we created, which wasn't possible until the contact was assigned.

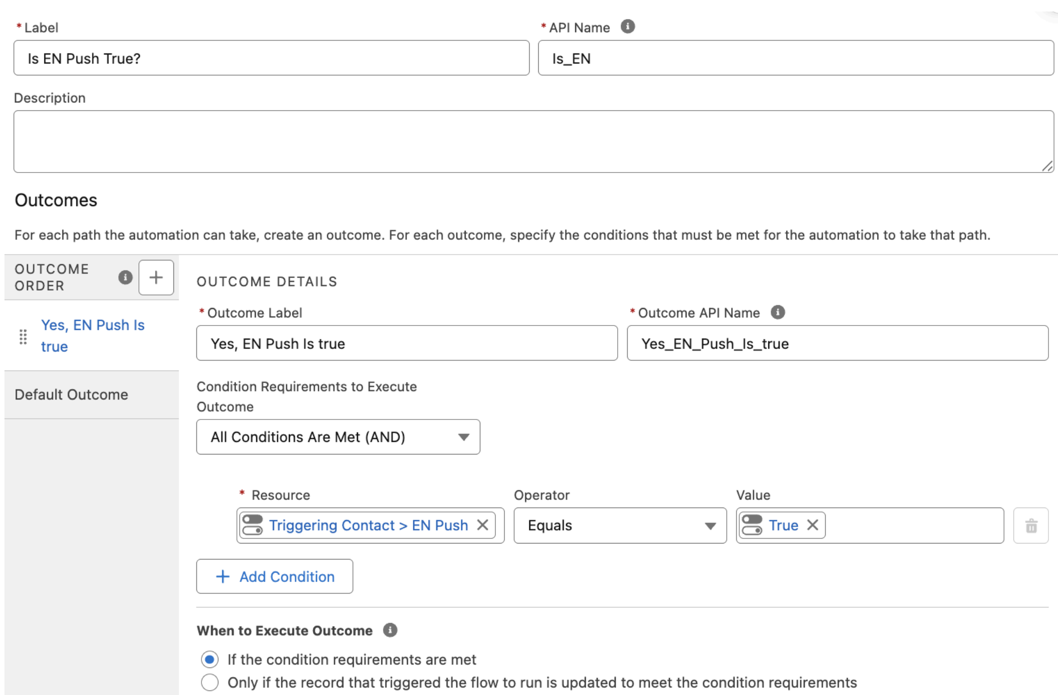


9. Save and activate the Flow.

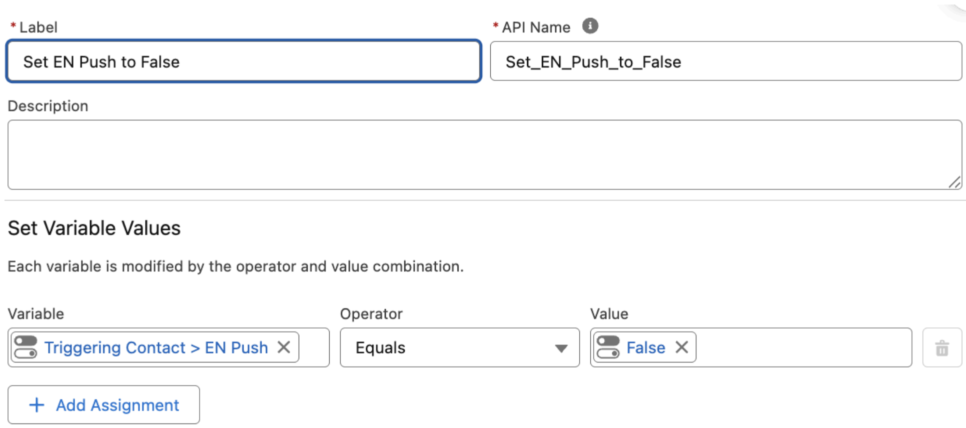
Engaging Networks Sync Management - Contact

Purpose: When a change is made to a contact in Salesforce, an automation is necessary to determine whether the contact should sync back to EN, or that the change came from EN and so the Contact should not sync back. This Flow makes that distinction and queues the contact to sync if a change was made in Salesforce that needs to be copied to EN.

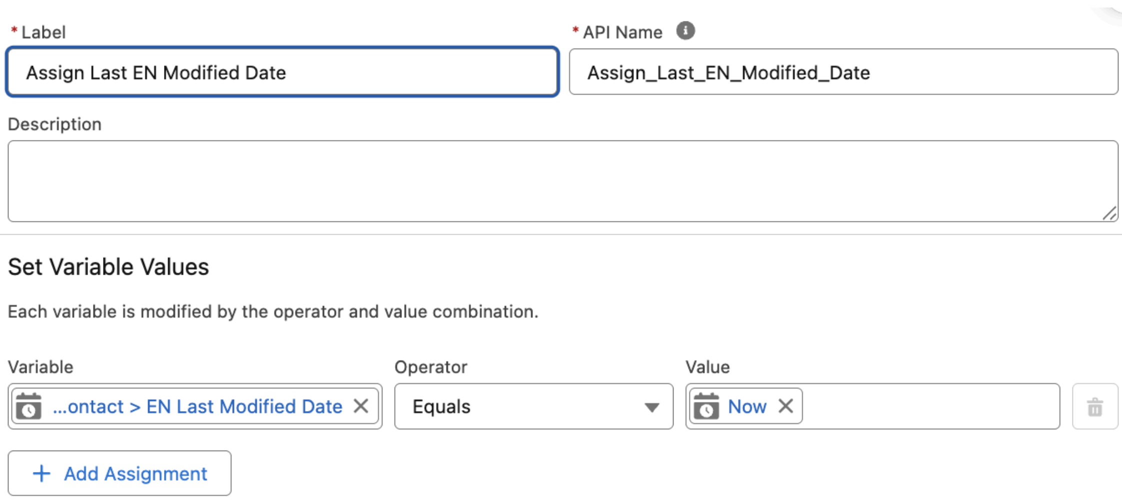
1. In Salesforce, navigate to Flows.
   a. Select New Flow.
   b. Choose Triggered Automations.
   c. Choose Record-Triggered Flow.
2. In Configure Start:
   a. Object: Contact
   b. Configure Trigger: A record is created or updated
   c. Entry Conditions - Condition Requirements: Use Any Condition is Met or Formula Evaluates to True. Use the Workflow pop-up as a model: If any synced field changes OR the field EN Push = true, you will want this Flow to be triggered.
   d. Optimize Flow for Fast Field updates
3. Add the plus sign below the Start element to add a Decision Element: Is EN Push True?. Add one additional outcome, as below:



4. On the Yes, EN Push is true branch, add the plus sign to add an assignment element. This will set the EN Push to false so that we'll be able to tell in the future if the update came from EN.



5. On the Default Branch, add the plus sign to add an assignment element. Here, we'll set the EN Last Modified Date field to queue the Contact to sync. NOTE: The Now resource is a formula that you can add at this step. When adding this resource, use the date/time Data Type, and the formula will be: NOW()



6. Save and activate the Flow.

Engaging Networks Sync Management - Account

Purpose: When a change is made to a Person Account in Salesforce, an automation is necessary to determine whether the account should sync back to EN, or that the change came from EN and so the Person Account should not sync back. This Flow makes that distinction and queues the Person Account to sync if a change was made in Salesforce that needs to be copied to EN.

This Flow is set up exactly like the Engaging Networks Sync Management - Contact Flow. The differences are:

The Object is Account instead of Contact.

Fields used in the configuration will have API names that end in __pc. That identifies them as person account fields, and will match values on the associated Contact record.

Engaging Networks Transaction Mapping Templates for Nonprofit Cloud

Person Account Top Up - Fundraising TEMPLATE

Transaction Types: All types that start with 'F' by default, but can be adjusted
Uses Contact Id to assign Person Account Id if SFDC Person Account Id field is blank. Default only looks up Fundraising records to reduce volume (Recommend also installing the Contact Top Up mapping rule to run prior to this one).

Fundraising Single - Look up Outreach Source Code TEMPLATE

Transaction Types: FCS, FBS, FOC, FCR, FBR by default
This mapping looks up the Outreach Source Code by assuming a unique code will be passed through the Appeal Code field in Engaging Networks, and compares against the Source Code field. Update the Source Code mapping to set a default, or adjust to use the field your organization will use for identifying the correct Outreach Source Code

Fundraising Single - Create Gift Transaction (FCS/FBS) TEMPLATE

Transaction Types: FCS, FBS, FOC

Mapping that processes one-time (single) donations, this mapping builds out a Gift Transaction for each successful fundraising transaction. By default, the mapping includes standard fields such as Amount and Close Date. It also writes the EN Tracking and Appeal Codes to open up the possibility for analysis through Salesforce reports. The gateway reference (EN Transaction Id field) preserves an audit trail between Salesforce Opportunities, Engaging Networks Transactions, and your payment gateway.

Fundraising Single - Create Gift Transaction Designation TEMPLATE

Transaction Types: FCS, FBS, FOC
Creates a Gift Transaction Designation once the Gift Transaction has been created. This mapping template assumes Salesforce Designation Id will be configured using External Transaction 7 on the Engaging Networks Donation page: may need to customize based on your organization's needs.

Fundraising Recurring - Migrated Gift Commitment (FCR/FBR) TEMPLATE

Transaction Types: FCR, FBR, where Transaction Data 4 = .00
When recurring transactions are migrated/imported into Engaging Networks, an initial $0.00 transaction is created indicating that the gift has been imported. This mapping rule uses the data stored on these initial rows to create the Gift Commitment that subsequent gifts can create

transactions for. It functions very similarly to the Fundraising Recurring – Create New Gift Commitment mapping rule (see below) but uses different criteria to find imported transactions. Can also be modified to find existing Gift Commitments to continue an existing recurring gift if the Salesforce Gift Commitment Id is provided with migration import.

Fundraising Recurring - Update Migrated Commitment Schedule (FBR/FCR) TEMPLATE

Transaction Types: FCR, FBR, where Transaction Data 4 = .00
The mapping updates the related Gift Commitment Schedule with EN Parent Transaction Id so that future gifts can use an established schedule if available.

Fundraising Recurring - Create New Gift Commitment (FCR/FBR) TEMPLATE

Transaction Types: FCR, FBR, where Transaction Data 11 is empty
The first of five mappings for processing a *new* Recurring Gift commitment. This mapping rule creates an active Gift Commitment.. The gateway id (Data 2) is stored on the Gift Commitment (EN Parent Transaction Id), as this "parent transaction id" will be used for processing all subsequent recurring charges.

Fundraising Recurring - New Commitment Schedule (FBR/FCR) TEMPLATE

Transaction Types: FCR, FBR, where Transaction Data 11 is empty
This mapping rule creates an active Gift Commitment Schedule, which contains information about the gift frequency. The gateway id (Data 2) is stored on the Gift Commitment Schedule as well (EN Parent Transaction Id), as this "parent transaction id" will be used for processing all subsequent recurring charges

Fundraising Recurring - Create New Gift Default Designation TEMPLATE

Transaction Types: FCR, FBR, where Transaction Data 11 is empty
This mapping rule creates a Gift Default Designation. Assumes field External Transaction 7 on the EN Page is enabled and is used for the Salesforce Id of the Designation.

Fundraising Recurring - Update Gift Commitment TEMPLATE

Transaction Types: FCR, FBR, where Transaction Data 11 is empty
This mapping updates the newly created Gift Commitment with the current Gift Schedule, which is created second.

Fundraising Recurring - Create Initial Recurring Gift Transaction (FCR/FBR) TEMPLATE

Transaction Types: FCR, FBR, where Transaction Data 11 is empty
The fourth of five mappings for both *new* recurring transactions. This mapping rule creates a new Gift Transaction associated with the Gift Commitment and Gift Commitment Schedule.

Fundraising Recurring - Find Existing Gift Commitment (FCR FBR) TEMPLATE

FCR, FBR, where Transaction Data 11 is not empty
Looks up existing Gift Commitment and Gift Commitment Schedule for subsequent gifts.

Fundraising Recurring - Create Subsequent Gift Transaction (FCR/FBR) TEMPLATE

FCR, FBR, where Transaction Data 11 is not empty
Finds or Creates Gift Transaction for existing recurring donation.

Fundraising Recurring - Create Gift Transaction Designation TEMPLATE

Transaction Types: FCR, FBR
Creates Gift Transaction Designation for new and subsequent transactions. This is the final mapping for successful recurring gifts and marks the Engaging Networks Staging Records as processed.

Fundraising Recurring Change - Update Commitment Schedule (FCR/FBR) TEMPLATE

Transaction Types: FCR, FBR, status = change/reject
This mapping sets End Date on current Gift Commitment Schedule. **NOTE:** Supplemental automation may be required if NPC is configured to automatically create new unpaid transactions - current commitment schedule can not be closed and only a few fields can be updated if unpaid transactions exist.

Fundraising Recurring Change - New Commitment Schedule for existing (FBR/FCR)

Transaction Types: FCR, FBR, status = change
This mapping sets up a new gift commitment schedule for an existing recurring gift with new values from update.

Fundraising Recurring Change - Update Gift Commitment Status (FCR FBR) TEMPLATE

Transaction Types: FCR, FBR, status = change
This mapping updates Gift Commitment with status and the Id of the newly created Gift Commitment Schedule

Fundraising Recurring Change - Update Gift Commitment - FRU TEMPLATE

Transaction Types: FRU
When a donor updates their payment card information via the supporter hub, or a user updates the donor's payment card information, the Parent Transaction Id changes for the recurring sequence. The FRU transaction allows us to look up the Gift Commitment and Gift Commitment Schedule that is attached to the prior Parent Transaction Id (Transaction Data 11) and write in the new Parent Transaction Id (Transaction Data 02) so future transactions can be properly matched up to the correct parent Gift Commitment.

Fundraising Recurring Change - Update Gift Commitment Schedule (FRU) TEMPLATE

Transaction Types: FRU
Similar to above with the Gift Commitment, this mapping updates the EN Parent Transaction Id on the Gift Commitment Schedule.

In Memoriam - Create Tribute Record (FIM) TEMPLATE

Transaction Types: FIM
When a tribute gift is processed in Engaging Networks, two transaction rows are generated. The first row is the financial detail (FCS/FBS) which is processed using the same mapping as non-tribute gifts, "Fundraising Single - Create Gift Transaction." The second row is the In Memorium transaction (FIM). This mapping looks up related Gift Transaction and creates a Gift Tribute record..

Fundraising Refund - Creates a Gift Refund Record (RFD) TEMPLATE

Transaction Types: RFD, EFD
This mapping creates a Gift Transaction Refund record when a gift is refunded.

Kindsight Ascend Integration

Ascend introduces additional objects (Interim and Review Transaction v2) that function as staging records to update ascend's unique configuration. This overview assumes that the organization will be using those objects to create and update records in ascend, and all settings and mapping rules are a starting point for creating Interim (which will update Constituent and related records) and Review Transaction v2 (which update opportunities and related records) records. When the interim is processed (manually or by a scheduled job that the ascend staff can set up), the related Review Transaction v2 will also process.

Ascend requires both a Campaign and Designation to be set on most Review Transaction Records. The following templates assume that External Transaction Data 6 is set up to contain the Salesforce Campaign Id, and that External Transaction Data 7 is set up to match the name of the desired Designation record. These can be reconfigured as required in the mappings.

JSON representations of the Kindsight-specific mappings can be found at the Engaging Networks GitHub repository:
https://github.com/EngagingNetworks/salesforce-connector-mappings

Mappings can then be installed through the Engaging Networks dashboard, under Transaction Mappings.

Set Up steps

Verify Package Version: Ensure your Salesforce organization is running Connector package version 1.4 or later. This version is a prerequisite for Kindsight Ascend integration support.

Add Fields

Label	API Name	Additional	Object	Description
Ascend Interim Id	Ascend_Interim_Id__c	Text(18)	Engaging Networks Staging Record	Text field that holds the Interim Id if created directly from the EN Mappings (eg. for advocacy transactions)
Ascend Transaction Id	Ascend_Transaction_Id__c	Text(18)	Engaging Networks Staging Record	Text field that holds the Review Transaction Record Id once it is created
Ascend External System Id	Ascend_External_System_Id__c	Formula: "ENSR-"& engaging__Transaction_Data_02__c	Engaging Networks Staging Record	Formula field that adds 'ENSR-' to Transaction Data 2 to function with ascend's settings
Ascend Interim External Id	Ascend_Interim_External_Id__c	Formula: "ENSU-"& engaging__Transaction_Data_02__c	Engaging Networks Staging Record	Formula field that adds 'ENSU-' to Transaction Data 2 to function with ascend's settings
Ascend Pledge/Gift Id	Ascend_Pledge_Gift_Id__c	Formula: "ENSR-"& engaging__Transaction_Data_11__c	Engaging Networks Staging Record	Formula field that adds 'ENSR-' to Transaction Data 11
Ascend Recurring Adj Reason	Ascend_Recurring_Change_Type__c	Formula: IF (CONTAINS(engaging__Transaction_Status__c, "amount") && CONTAINS(engaging__Transaction_Status__c, "pmt day"), "Amount change;Gift Date Change", IF (CONTAINS(engaging__Transaction	Engaging Networks Staging Record	Formula field that translates EN Recurring Gift Changes to values that can populate the Review Transaction v2 record.

		_Status__c, "amount"), "Amount Change", IF (CONTAINS(engaging__Transaction_Status__c, "pmt day"), "Gift Date Change","Other")))		
Ascend Interim Lookup	Ascend_Interim_Lookup__c	Lookup: Interim	Engaging Networks Staging Record	Can be updated via EN matching rules to link Interim record. Used if direct updates to an existing interim record are required.
Ascend Contact Id from Interim	Ascend_Contact_Id_from_Interim__c	Formula: Ascend_Interim_Lookup__r.ucinn_ascendv2__Contact__c	Engaging Networks Staging Record	Formula field that displays the SFDC Constituent Id populated on the Interim record by ascend processes
Ascend Payment Lookup	Ascend_Payment_Lookup__c	Lookup: Payment	Engaging Networks Staging Record	Can be updated via EN matching rules to link the refunded payment record. Used primarily to link a refund RTv2 generated by the ENSR to an existing payment record.
Ascend Payment Ext Id	Ascend_Payment_Ext_Id__c	Formula: Ascend_Payment_Lookup__r.ucinn_ascendv2__External_System_ID__c	Engaging Networks Staging Record	Pulls in External Id assigned by ascend to the payment for processing refunds via the Ascend Payment Lookup field
Ascend Payment Parent Transaction	Ascend_Payment_Parent_Transaction_Id__c	Formula: Ascend_Payment_Lookup__r.ucinn_a	Engaging Networks Staging Record	Formula field that displays the EN Parent Transaction Id on the

Id		scendv2__Opportunity__r.ucinn_ascendv2__External_System_ID__c		Opportunity via the Ascend Payment Lookup Field
Ascend Refund Tender	Ascend_Refund_Tender__c	Formula: Ascend_Payment_Lookup__r.ucinn_ascendv2__Tender_Type_Formula__c	Engaging Networks Staging Record	Formula field that displays the original tender of a payment to be adjusted using the Ascend Payment Lookup field
Ascend Refund Amount	Ascend_Refund_Amount__c	Formula: IF(engaging__Transaction_Type__c = "RFD" || engaging__Transaction_Type__c = "EFD" || engaging__Transaction_Type__c = "PRFD", -1*VALUE(engaging__Transaction_Data_04__c) , NULL)	Engaging Networks Staging Record	Sets the negative refund amount to a positive amount for payment adjustments.
Ascend RD Change External Id	Ascend_RD_Change_External_Id__c	"ENSR-"& engaging__Transaction_Data_02__c &"-"& engaging__Transaction_Data_01__c	Engaging Networks Staging Record	Adds the EN transaction Id to the end of the Id on a recurring donation change transaction to allow unique Id on a Review Transaction v2 record (to allow for multiple adjustment records)
EN Supporter Id	EN_Supporter_Id__c	Text(255)	Interim	Text field to map EN Supporter Id to Contact
En Supporter Id	EN_Supporter_Id__c	Text(255)	Review Transaction v2	Text field on Review Transaction Id that

				maps to the field on the Interim Record

Add Record Types and Page layouts

- Add a new record type to the object Review Transaction v2 named "Engaging_Networks". This can be paired with a Page Layout for Engaging Networks that surfaces any EN-specific fields.
- Add a new record type to the object Interim called "Engaging Networks Interface". This can be paired with a Page Layout for Engaging Networks that surfaces any EN-specific fields.

Add ENSR- Prefix to Review Transaction (v2) Custom Meta Data

1. Navigate to Setup > Custom Metadata Types > Review Transaction Prefix and click Manage Records
2. Click "New".
3. Make the following updates:

   Review Transaction Prefix Detail

   Label: Engaging Networks
   Review Transaction Prefix Name: Engaging_Networks
   Prefix: ENSR
   Constituent Interim Record Type Prefix: ENSU
   Record Type Label: Engaging Networks
   Payment Method: Inherited

   Bio Demo Information

   Create Con Interim if No Con or Org: TRUE
   Create Constituent Interim Override Map:

{"EN_Supporter_Id__c":"EN_Supporter_Id__c",
"ucinn_ascendv2__First_Name__c": "ucinn_ascendv2__First_Name__c",
"ucinn_ascendv2__Last_Name__c": "ucinn_ascendv2__Last_Name__c",
"ucinn_ascendv2__Email_1__c": "ucinn_ascendv2__Email_1__c",
"ucinn_ascendv2__Phone_1__c": "ucinn_ascendv2__Phone_1__c",
"ucinn_ascendv2__Address_1_Line_1__c":
"ucinn_ascendv2__Address_1_Line_1__c",
"ucinn_ascendv2__City_1__c": "ucinn_ascendv2__City_1__c",
"ucinn_ascendv2__State_1__c": "ucinn_ascendv2__State_1__c",
"ucinn_ascendv2__Postal_Code_1__c":
"ucinn_ascendv2__Postal_Code_1__c",
"ucinn_ascendv2__Country_1__c": "ucinn_ascendv2__Country_1__c",
"ucinn_ascendv2__Address_1_Type__c":
"ucinn_ascendv2__Address_1_Type__c",

"ucinn_ascendv2__Email_1_Type__c":"ucinn_ascendv2__Email_1_Type__c"
}
Donor External Id Override:
["engaging__EN_Supporter_Id__c","ucinn_ascendv2__Donor_ID__c"]

4. Save.

Add Interim Custom Setting

Navigate to Settings > Custom Setting > Interim Record Types and click Manage Records.
Click "New"
Fill in the following fields:
Name: EngagingNetworks
External ID Prefix: ENSU
Record Type Name: Engaging Networks Interface
Save

Add Merge Interim Field

Navigate to Settings > Custom Metadata Types > Merge Interim Card > and click "Manage Records"
Click on "Additional Info"
Click on LastName under Merge Interim fields
Clone this record
Make the following updates:
Label: EN Supporter Id
Merge Interim Field Name: EN_Supporter_Id
Field To Map To: engaging__EN_Supporter_Id__c
Field API Name: EN_Supporter_Id__c

Verify (or update) Ascend Matching Rules

These settings are likely to vary. This will cause the Review Transactions to create an Interim that matches on the EN Supporter Id (if supplied). This will cause ascend to process any updates to the name, email address, mailing address, or phone number present on the Review Transaction v2 record. If this is not desired behavior, work with ascend's support team to utilize their deduplication tools as required by your organization.

Note that both ascend and Engaging Networks have installed objects called "Matching Rules". The labels can be renamed to differentiate the two.

1. Navigate to Ascend's Matching Rules via the App Picker.
   Click on the Interim to Contact Matching Rule
   Click on "Related"
   Under Global Matchings, click on "New"

Update the following fields:

Global Matching Name: EN Supporter Id
Matching Rule: Interim to Contact
Filter:
Score: 500
Source Object field: EN_Supporter_Id__c
Target Object field: engaging__EN_Supporter_Id__c
Target Object name: Contact
Target Object Result Field: Id

2. Navigate Settings > Custom Metadata Types > Merge Settings > Click Manage Records

   Open Default record
   Scroll down to Auto Merge settings
   Make sure Use Auto Merge V2 is set to TRUE
   Set Auto Merge Threshold to 400

Engaging Networks Transaction Mapping Templates for ascend

Fundraising Single - Create Outright Gift RTv2 - FBS, FCS, FCA, FCH (template)

Transaction Types: FCS, FBS, FOC
This mapping rule maps to the Review Transaction v2 record for successful one time gifts. Ascend refers to these as "Outright Gifts".

Fundraising Single - Refund RTv2 - RFD (template)

Transaction Types: RFD, single gifts
This mapping rule processes full refunds for single donation transactions

Fundraising Recurring - Initial RTv2 - FBR,FCR (template)

Transaction Types: FBR, FCR
This mapping creates a Review Transaction v2 that will create the opportunity representing a recurring gift and the first payment.

Fundraising Recurring - Subsequent RTv2 - FBR,FCR (template)

Transaction Types: FBR, FCR
This mapping creates a Review Transaction v2 that will add subsequent payments to the opportunity representing the recurring donation.

Fundraising Recurring - Cancel RTv2 - FBR,FCR (template)

Transaction Types: FBR, FCR
This mapping creates a Review Transaction v2 record that terminates an active recurring donation

Fundraising Recurring - Change w/ Amount RTv2 - FBR,FCR (template)

Transaction Types: FBR, FCR
This mapping will create a Review Transaction v2 Record that will adjust the amount and/or payment date of a recurring transaction

Fundraising Recurring - Change w/o Amount RTv2 - FBR,FCR (template)

Transaction Types: FBR, FCR
This mapping will create a Review Transaction v2 Record that will adjust the payment date of a recurring transaction

Fundraising Recurring - Refund RTv2 - RFD (template)

Transaction Types: RFD, recurring
This mapping rule processes a full refund for a payment that is part of a recurring donation.

Fundraising Recurring - Card Update - FRU (template)

Transaction Types: FRU
This mapping rule does not create a Review Transaction v2 record. It updates the opportunity representing the recurring donation directly with the new Parent Transaction Id, stored in the External System Id field on the Opportunity record.

Fundraising In Memoriam - Update RTv2 with Tribute - FIM (template)

Transaction Types: FIM
This mapping updates the Review Transaction v2 Record created by the Fundraising Single or Fundraising Recurring mapping rules. It sets tribute fields on the Review Transaction v2 Record, so that it will add a tribute record to the opportunity.

Event Fundraising Single - Create Outright Gift RTv2 - EBS, ECS, ECC (template)

Transaction Types: ECS, EBS, ECC
This mapping rule maps to the Review Transaction v2 record for successful event donations. Ascend refers to these as "Outright Gifts".

Advocacy - Create Interim - ETT,TWT,CTT,PET (template)

Transaction Types: PET, CTT, ETT, TWT
This mapping rule creates an interim record directly. Once the interim is processed, the Contact Id will appear on the Engaging Network Staging Records and allow it to be added to relevant campaigns.

Advocacy - Create Campaign Member (template)

Transaction Types: PET, CTT, ETT, TWT

If an advocacy page is configured with SFDC Campaign Id, this mapping rule adds participants to the Campaign. The Campaign Member status is set to Responded.

> ⓘ This particular mapping only runs if the Contact is not a pre-existing member of the Campaign. Salesforce does not permit adding a Contact twice to the same Campaign. A trigger installed on the ENSR object assists: if both Campaign Id and Contact Id are populated when the ENSR is created, the trigger checks whether a Campaign Member already exists for this Contact/Campaign combination. If a match is found, the trigger writes the Campaign Member Id to the ENSR. This way, this "create" mapping avoids creating a duplicate Campaign Member by checking the SFDC CampaignMember Id field.

> ⓘ If multiple unprocessed staging records are present for the same Contact Id - Campaign Id pair, this mapping rule does a 'group by' ensuring the contact is added to the campaign just once. This can happen for ETT, for example, where one action with 4 targets can result in 4 distinct staging record rows.

Advocacy - Update Existing Campaign Member (template)

Transaction Types: PET, CTT, ETT, TWT
This mapping is a companion to "Advocacy - Create Campaign Member" above. In the event a Campaign Member already exists, this mapping updates the status of this pre-existing Campaign Member status to "responded".

> ⓘ If multiple unprocessed staging records are present for the same Contact Id - Campaign Id pair, this mapping rule does a 'group by' ensuring the contact is added to the campaign just once. This can happen for ETT, for example, where one action with 4 targets can result in 4 distinct staging record rows.

Peer-to-Peer Mapping Templates with ascend

The Peer-to specific mapping rules are designed to work with Salesforce's Campaign Hierarchy Structure, and take advantage of summary functionality.

- Each Campaign will summarize both the campaign members and opportunities related to it in addition to the summary of each child campaign's totals.
- Please note that the limit of hierarchy for Salesforce is 5 levels. As templated, including Organizations and Teams, this hierarchy structure is 4 levels.
- As with all Engaging Networks mappings, they can be customized to work with your Salesforce configuration.
- If you are not using Organizations or Teams, excluding relevant templates from installation will not affect the other mapping templates.

Peer-to-Peer Site - Create Parent Campaign - PSTE (template)

Transaction Types: PSTE
This mapping finds a Campaign record, using the Page Id (EN Campaign Id), or creates a new Campaign record if none is found, and updates information. This Campaign represents the Site Donation Page, and is the parent campaign for the hierarchy.

Peer-to-Peer Site - Create Organization Page Campaign - PFOC (template)

Transaction Types: PFOC
This mapping finds a Campaign record, using the Page Id (EN Campaign Id), or creates a new Campaign record if none is found, and updates information. This Campaign represents the Organization Donation page, which both Team and Fundraiser Pages can be childed to.

Peer-to-Peer Site - Create Team Page Campaign - PFTC (template)

Transaction Types: PFTC
This mapping finds a Campaign record, using the Page Id (EN Campaign Id), or creates a new Campaign record if none is found, and updates information. This Campaign represents the Team Donation page, which Fundraiser Pages can be childed to.

Ascend Peer-to-Peer Site - Create Interim for Fundraiser - PFRP (template)

Transaction Types: PFRP
This mapping creates an interim record if the SFDC Contact Id is blank, so that the Fundraiser Contact can be created in Salesforce.

Ascend Peer-to-Peer Site - Create Individual Page Campaign - PFRP (template)

Transaction Types: PFRP
This mapping rule runs if the SFDC Contact Id is blank, but the Contact Id from Interim is not blank, and will populate the contact Id of the contact created or updated by the above mapping rule. This mapping finds a Campaign record, using the Page Id (EN Campaign Id), or creates a new Campaign record if none is found, and updates information. This Campaign represents the Fundraiser Donation page, and can be childed to any of the other Campaign types.

Peer-to-Peer Site - Create Individual Page Campaign - PFRP (template)

Transaction Types: PFRP
This mapping rule runs if SFDC Contact Id is supplied. This mapping finds a Campaign record, using the Page Id (EN Campaign Id), or creates a new Campaign record if none is found, and updates information. This Campaign represents the Fundraiser Donation page, and can be childed to any of the other Campaign types.

Peer-to-Peer - Update Fundraiser's Team Campaign - Remove (PFTE) (template)

Transaction Types: PFTE
This type represents the Engaging Networks action of removing a Fundraiser from a Team. This mapping finds a Campaign record, using the Page Id (EN Campaign Id), and sets the Parent Campaign back to the Site level campaign, removing it and all related opportunities to a new place in the hierarchy directly below the Site Campaign.

Peer-to-Peer - Update Org Campaign of Fundraiser/Team - Remove (PFOE) (template)

Transaction Types: PFOE
This type represents the Engaging Networks action of removing a Fundraiser or Team from an Organization. This mapping finds a Campaign record, using the Page Id (EN Campaign Id), and sets the Parent Campaign back to the Site level campaign, removing it and all related opportunities to a new place in the hierarchy directly below the Site Campaign.

Peer-to-Peer - Update Org Campaign of Fundraiser/Team - Add (PFOA) (template)

Transaction Types: PFOA
This type represents the Engaging Networks action of adding a Fundraiser or Team to an Organization. This mapping finds a Campaign record, using the Page Id (EN Campaign Id), and sets the Parent Campaign to the Organization campaign, moving it and all related opportunities to a new place in the hierarchy directly below the Organization Campaign.

Peer-to-Peer - Update Fundraiser's Team Campaign - Add (PFTA) (template)

Transaction Types: PFOA
This type represents the Engaging Networks action of adding a Fundraiser or Team to an Organization. This mapping finds a Campaign record, using the Page Id (EN Campaign Id), and sets the Parent Campaign to the Organization campaign, moving it and all related opportunities to a new place in the hierarchy directly below the Organization Campaign.

Peer-to-Peer - Update Campaign Page (TPPU, IPPU, OPPU) (template)

Transaction Types: TPPU, IPPU, OPPU
This mapping updates existing campaign records (name, goal, etc.) to match Engaging Networks pages. If multiple changes occur in one day, it will group changes and choose the most recent record for updating the campaign, which will have all final updated data.

Peer-to-Peer - Fundraising Single - Create RTv2 - PFCS, PFBS, PACS (template)

Transaction Types: PFCS, PFBS, PPAY, PACS
This mapping rule mirrors the Fundraising Single - Create Outright Gift RTv2 - FBS, FCS, FCA, FCH (template). This mapping rule maps to the Review Transaction v2 record for successful one time gifts. Ascend refers to these as "Outright Gifts".

Peer-to-Peer - Fundraising Single - Update RTv2 - PPAY (template)

Transaction Types: PFCS, PFBS, PPAY, PACS
This mapping rule updates a Review Transaction RTv2 with the payment details of the additional donation. The PPAY shares the External Transaction Id with the prior gift, and can't create an additional Review Transaction v2.

Peer-to-Peer - Fundraising Single - Refund RTv2 - PRFD (template)

Transaction Types: PRFD, single gifts
This mapping rule processes full refunds for single donation transactions

Peer-to-Peer - Fundraising Recurring - Initial RTv2 - PFBR,PFCR (template)

Transaction Types: PFCR, PFBR
This mapping rule mirrors the Fundraising Recurring - Initial RTv2 - FBR,FCR (template) (see above).

Peer-to-Peer - Fundraising Recurring - Subsequent RTv2 - PFCR, PFBR (template)

Transaction Types: PFCR, PFBR
This mapping rule mirrors the Fundraising Recurring - Subsequent RTv2 - FBR,FCR (template)(see above).

Peer-to-Peer - Fundraising Recurring - Refund RTv2 - PRFD (template)

Transaction Types: PRFD, recurring gifts
This mapping rule processes full refunds for single donation transactions

Peer-to-Peer - Tribute - Update RTv2 with Tribute - PFIM (template)

Transaction Types: PFIM
This mapping rule mirrors the Fundraising in Memoriam mapping. (see above).

Enterprise Data Sync

The **Enterprise Data Sync** allows for high-frequency data syncing between Engaging Networks and Salesforce. Unlike the standard nightly sync, this feature pushes and processes transactions approximately every 10 minutes.

Prerequisites

Before enabling high-frequency syncing, ensure your organization meets the following requirements:

- **Salesforce Package:** You must be on the latest Salesforce package version (version 1.4 or higher).
- **Provisioning:** This is a paid enterprise feature. Once contracted, you must submit a support ticket to have the high-frequency sync enabled on the Engaging Networks side.

Required Salesforce Configuration

Once Support has enabled the back-end setting, the Salesforce Admin must complete these steps to initialize the service:

Prepare Existing Records (Avoid Duplicates)

To prevent the new engine from re-processing legacy data, you must flag all existing **Engaging Networks Staging Records (ENSR)** with a new Batch ID value.

1. Use a Data Loader tool to export all current ENSR records.
2. Update the Batch_Id__c field with a unique dummy value (e.g., DAILY_SYNC_2026).
3. Complete the upsert. **If this field is empty, the mapping engine will treat them as new records and may create duplicates.**

Failing to add a Batch_Id__c value to existing ENSR records will create duplicate records in your Salesforce organization.

Enable Dynamic Batching

Navigate to **Setup > Custom Code > Custom Metadata Types** and find **EN Settings**.

1. Click **Manage Records**.
2. Create a new record:
    - **Label:** Batch Type
    - **EN Setting Name:** BatchType
    - **Value:** Dynamic

3. *(Optional)* To adjust the gap between syncs, create a record for Dynamic Batch Frequency. The value is in seconds (default is 60).

When Batch Type is set to Dynamic in the Metadata, the regular Process Mapping Rules job will not run, regardless of it being setup.

Data Processing Rules

The Enterprise Data Sync changes how specific data types are handled:

Data Type	Sync Frequency	Method
Transactions (Fundraising, Advocacy, Events)	~10-20 Minutes	Dynamic Batch Engine
Contact Data (Pull/Push)	~20 Minutes	Standard Sync
Email Engagement (EBC, MBC, SBC)	Once Daily	Standard Processing
Manual Supporter Updates (MSU, MSC, SSU, SSC, HSU)	Once Daily	Standard Processing

The "Contact Top Up" Rule

Because transactions may arrive in Salesforce before the full Contact sync has finished, we recommend configuring the **Contact Top Up** rule in your Mapping Rules:

- **Matching Type:** Set to **"Duplicate Rules"** to utilize your native Salesforce deduplication logic.
- **EN Push Override:** We recommend adding an "OVERRIDE WITH" mapping for the EN Push field set to **TRUE**. This prevents a "circular sync" where a partial record pushes back to Engaging Networks before it is fully populated by the Contact sync.
- **Additional biography fields:** If using “Sync Extended Supporter Details” setting in Engaging Networks, you can add additional biographical data to the mapping items in the Contact Top Up rule to create a more complete contact record.

Troubleshooting Recommendations

- Unlike the standard Connector, if you encounter errors from Staging Record processing, you will need to clear both the Error Details field AND the Batch ID field in order for it to be picked up again for re-processing.