



Salesforce Integration Process

The following is a process for getting your Donately data integrated with Salesforce.

Step: Donately Webhook Flows

Webhook: **account.donation.create.success**

- Create Account
- Create / Update Donor
- Create / Update Donation

Webhook: **account.donation.update.success**

- Create / Update Donation

Webhook: **account.person.pii.update.success**

- Create / Update Donor

Webhook: **account.subscription.update.success**

- Create / Update Donation

Create (Account)

Donately Webhook Field	Salesforce Object Name	Salesforce Field Name	Salesforce Field Type
donation.person.full_name_or_email	Account	Name	Standard

Create / Update Donor (Contact)

Donately Webhook Field	Salesforce Object Name	Salesforce Field Name	Salesforce Field Type
donation.person.id	Contact	DntlyPersonId	TextField (Custom)
donation.person.email	Contact	Email	Standard
donation.person.first_name	Contact	FirstName	Standard
donation.person.last_name	Contact	LastName	Standard
donation.person.full_name	Contact	Name	Standard
donation.person.phone_number	Contact	Phone	Standard
donation.person.street_address	Contact	MailingStreet	Standard
donation.person.city	Contact	MailingCity	Standard
donation.person.state	Contact	MailingState	Standard
donation.person.country	Contact	MailingCountry	Standard
donation.person.zip_code	Contact	MailingPostalCode	Standard
Combine address fields	Contact	dntly_FullAddress_c	TextField (Custom)

Create / Update Donation & Subscription (Deal)

Donately Webhook Field	Salesforce	Salesforce Field Name	Salesforce Field Type
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	Object Name		
\$500 Donation	Opportunity	Description	Standard
donor@email \$12.35 recurring/one-time donation on donation date	Opportunity	Name	Standard
donation.amount	Opportunity	Amount	Standard
Closed Won	Opportunity	Stage	Standard
donation.donation_date	Opportunity	CloseDate	Standard
\$12.35 recurring/one-time donation to Campaign title fundraiser title	Opportunity	Description	Standard
Links to the Campaign object	Opportunity	Campaign	Standard
donation.id	Opportunity	DntlyDonationId	TextField (Custom)
donation.currency	Opportunity	DntlyCurrency	TextField (Custom)
donation.donation_type	Opportunity	DntlyDonationType	TextField (Custom)
donation.transaction_id	Opportunity	DntlyTransactionId	TextField (Custom)
donation.processor	Opportunity	DntlyProcessor	TextField (Custom)
donation.livemode	Opportunity	DntlyLivemode	TextField (Custom)
donation.comment	Opportunity	DntlyComments	TextAreaField (Custom)
donation.anonymous	Opportunity	DntlyAnonymous	TextField (Custom)
donation.on_behalf_of	Opportunity	DntlyOnBehalfOf	TextField (Custom)
donation.tracking_codes	Opportunity	DntlyTrackingCodes	TextAreaField (Custom)
donation.meta_data	Opportunity	DntlyMetadata	TextAreaField (Custom)
donation.dtd_company_name	Opportunity	DntlyDtdCompanyName	TextField (Custom)
donation.form_id	Opportunity	dntly_FormId__c	TextField (Custom)
donation.recurring_frequency	Opportunity	dntly_RecurringFrequency__c	TextField (Custom)
donation.status	Opportunity	dntly_DonationStatus__c	TextField (Custom)
donation.subscription_id	Opportunity	dntly_SubscriptionId__c	TextField (Custom)
donation.campaign_id	Opportunity	dntly_CampaignId__c	TextField (Custom)

donation.campaign_title	Opportunity	dntly_CampaignName__c	TextField (Custom)
donation.fundraiser_id	Opportunity	dntly_FundraiserId__c	TextField (Custom)
donation.fundraiser_title	Opportunity	dntly_FundraiserName__c	TextField (Custom)
donation.recurring	Opportunity	dntly_DonationRecurring__c	CheckBox (Custom)
donation.subscription_start_date	Opportunity	dntly_SubscriptionStartDate__c	Date (Custom)