Classy

Integrating Classy with Salesforce

NPSP version

What is Classy for Salesforce?

The Classy for Salesforce integration offers a streamlined experience, combining one of the most popular and customizable CRM tools with Classy's fundraising platform. Salesforce, renowned for its flexibility and widely used among Classy customers, receives donor data seamlessly from Classy through this integration. It is compatible with the Nonprofit Success Pack (NPSP) and is supported by an in-house team dedicated to the Classy for Salesforce integration. Primarily, data flows from Classy to Salesforce, although contact record updates and offline donations can also sync back to Classy. This automatic data transfer eliminates the need for manual export and import processes, enhancing efficiency and data accuracy.

The timely setup of Classy for Salesforce integration is crucial for nonprofit organizations due to the importance of maintaining clean donor data and supporter records. This is essential for reconciliation, financial reporting, and effective donor management and stewardship. Saving team members' time is also a top priority for nonprofit organizations. Classy understands that messy data can lead to significant cleanup efforts and increased manual tasks, so it's vital to set up integrations correctly for seamless data flow.

Many nonprofits initially feel they can only launch their fundraising campaigns on Classy once their Salesforce integration is fully operational. This process can sometimes be time-consuming, especially if you have numerous custom fields or are setting up a new instance of Salesforce. Such delays can postpone access to your new fundraising technology and delay improvements to your donor experience and fundraising revenue. To ensure you see a return on your investment from the start, we provide solutions that enable a quick launch without compromising clean donor data and efficient processes.

The value of getting started with Classy first

Classy is a comprehensive fundraising platform that stores all essential donor and transaction data. Campaign, supporter, and transaction data is easily accessible in pre-built, customizable reports directly in Classy Manager. This data can be manually imported into your existing CRM or historically synced later once your integration is successfully set up. Many organizations have been in the same shoes and chose to launch with Classy first, as the benefits outweigh a temporary need for manual reconciliation.

Ronald McDonald House Charities San Diego decided to use Classy before setting up their Salesforce integration and saw immediate benefits.

> Our experience since working with Classy late last year has been **incredibly positive**. Immediately after we started partnering with Classy, we were able to insert a pop-up donation form on our main website, which allowed end-of-year donors to quickly access the form and be able to give seamlessly…We saw a huge uptick at the end of the year.

Ronald McDonald House Charities® San Diego

Ultimately, early adoption of Classy impacts the amount of revenue your organization will see from existing or new donors. Our smart fundraising tools ensure you see improvements in your fundraising strategy. By starting now, you can use **Intelligent Ask Amounts** that increase revenue by **11%**, embedded donation forms that **boost conversion rates**, and streamlined campaigns that acquire recurring donors with a **higher lifetime value**. Look at this decision like an equation, and consider how much more you'll raise with increased revenue and a higher conversion rate and how much you'll save by reducing the overlap between two fundraising platforms.

Getting started with your Classy campaigns first means you'll see other immediate benefits like:

Obtaining feedback from loyal supporters that you can use to iterate and optimize your campaigns before a launch to your general audience.

Gaining confidence with running campaigns and understanding how transaction data flows through to Classy Manager.

Validating your decision to choose Classy and a proof of concept you can share with decision-makers, executives, and board members.

We understand that learning to use and integrate a new platform with your Salesforce environment is a big task. Some common concerns we've encountered include the fear of losing donor data by sharing your first campaign before setting up your integration and the fear of the manual work that could come with launching on Classy before perfecting your data model. With a good understanding of the solutions for these concerns, you can confidently get started with Classy now.

Starting with Classy first

Before setting up your integration, you will build your first campaign by following **seven short steps**. Most organizations complete and launch this during their first week on the platform. As supporters engage with your campaign, many CRM functionalities will happen automatically through Classy. They'll receive donation confirmations and tax-deductible receipts, and their transaction history will be stored.

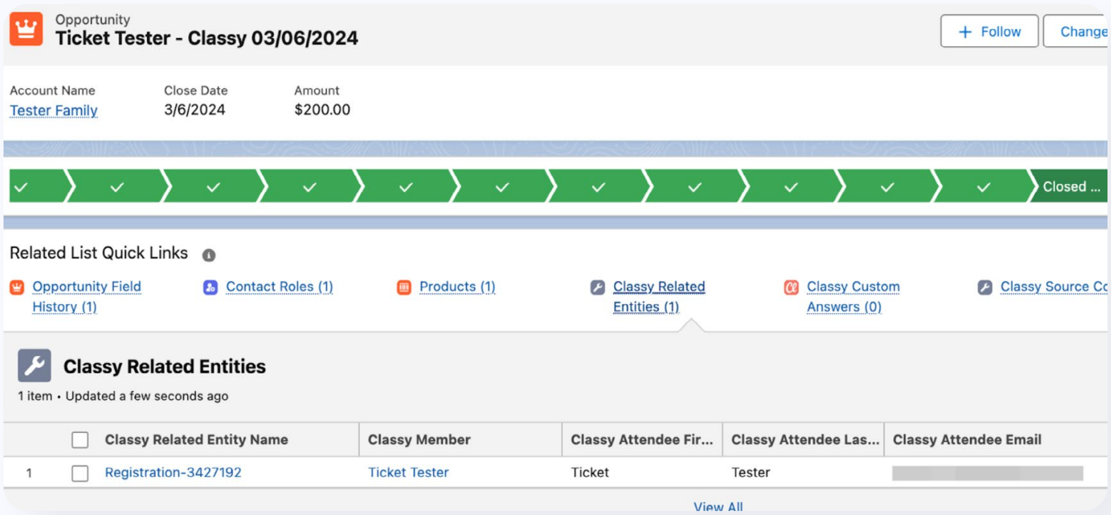
After your first campaign has launched, and before your Classy for Salesforce integration is set up, you can manually export and import that data into your existing CRM or accounting software. Using Classy reporting, exporting, and importing the data is easy. Create a custom report or choose a menu page to view and filter data. For example, select **Transaction History**, add columns or filters, and **export** the report.

Use **Data Loader** if importing Classy data into an existing Salesforce instance. Otherwise, the **steps to import** will depend on which CRM you use. Once you're ready to set up the integration, there are a few important steps to be aware of.

Setting up the Classy for Salesforce integration

It's important that donor data flows into your Salesforce environment exactly as you prefer. To ensure you can configure the integration to your liking, Classy lets you **first connect to a sandbox environment** to adjust settings. Once you're pleased with the configuration, you can switch to your production environment and use our **Data Sync Tool** to bring over all of the donor data that came into Classy in the interim. This way, you can take advantage of our high conversion rates and revenue-increasing features by launching your campaign immediately and experimenting with Salesforce simultaneously.

- [ ] Setting up the integration is an easy process within Classy. First, assign a Salesforce System Admin user and follow the steps to **connect Classy for Salesforce**.
- [ ] Once connected, use **C4SF Objects and Fields** documentation to understand how Classy creates and updates objects in Salesforce. In addition, reference the complete list of fields on each object to know which fields Classy uses. If you use custom fields, create a **custom field map** to sync Classy data where you want it.
- [ ] Next, add Classy fields to your **page layouts** to view Classy data on your records. Some helpful fields to add are **Classy Opt-In** on the Contact object and **Transaction Type** on the Opportunity. Any Classy field related to amounts or fees is helpful to add.
- [ ] Adding Related Lists to your page layouts is another helpful way to find Classy information quickly. Add the Products and Classy Related Entity lists on the Opportunity layout to view tickets purchased in an event and your attendees' information.



- [ ] Add the Classy Supporter list on the Contact record to view the supporter information from Classy tied to that Contact. We recommend adding **Classy Custom Answers** to the Contact, Opportunity, or Campaign records to view your supporters' answers to custom questions.

Recommended settings

Integration **settings** are found in the Classy Control Panel V2 and change how Classy data will sync to Salesforce. To prevent duplicate Contact records from being created, we recommend immediately turning on **Enhanced Contact Matching**. This setting will work with your instance's **duplicate rules** to have the best results with Contact matching. If you don't have duplicate rules, we recommend activating one on the Contact object with Salesforce's **Standard Matching Rule**.

Turn on **Use Classy Supporter information for Contact matching and creation**. Then, the Supporter information from Classy creates a Classy Supporter record for Contact matching or creation. When this setting is off, the integration uses the billing information from the transaction to match or create Contacts.

If you use NPSP and are not completing a recurring donor migration, turn on **Create & Update NPSP Recurring Donations** so Classy syncs recurring donation data to your NPSP records. Also, sync Classy program designation data to your GAUs by turning on **Create & Update NPSP GAUs** and **Create & Update NPSP GAU Allocations**.

We recommend starting with these settings and then testing the others in batches. This can help you better understand how various settings affect Classy data in Salesforce.

Review data

Review Classy data flowing into Salesforce as donations come in and adjust settings and your page layouts as necessary. During this period, use **Classy reports** as your source of truth.

If any data is missing in Salesforce, view the Classy API requests to see why the sync failed. To do so:

1. Use Salesforce App Launcher and search for **Classy API Requests**
2. Change the list view to **Failed**
3. Select the record with the Classy ID that failed, or create a filter for the list that includes the ID
4. Scroll to the bottom to see the error log
5. Look up the **API Request error messages** and the resolution steps

When you've resolved the conflicts, use the **Data Sync Tool** to sync the data manually. If you have multiple months' worth of data to sync, we recommend breaking it into chunks of two to three weeks.

After ensuring the data is syncing as expected, it's time to switch to your production instance. Match the Classy Control Panel V2 settings to what was configured in your sandbox, and use the Data Sync Tool to import all the Classy data.

Recurring Donor Migrations

If you plan to complete a Recurring Donation Migration (RDM) from another platform to Classy and have existing NPSP recurring donation objects in your Salesforce instance, follow the steps below to avoid duplicate records.

1. Complete the Recurring Donor Migration
2. Begin processing migrated recurring transactions on Classy
3. When you are ready, activate C4SF with the **“Create & Update NPSP Recurring Donations”** setting **disabled**
4. Perform Classy historical data sync to Salesforce
5. Follow the steps outlined in **‘Mapping’ Existing NPSP Recurring Donation Records to Classy Recurring Donations**
6. Enable the “Create & Update NPSP Recurring Donations” setting
7. The overnight ClassyRecurringProfileRollupBatch job will automatically create any NPSP recurring donation records from net-new Classy recurring donations that were included in the historical sync, since the “Create & Update NPSP Recurring Donations” setting was disabled during the sync

Customers using Classy’s NPC integration should use the old recurring donation records for historical transaction data and the new Classy recurring donation records for all future transactions. Classy has not determined a method for ‘mapping’ NPC records together.

Considerations

One of the most important things to understand about the Classy for Salesforce integration is that data starts syncing in real time once the integration setup is complete. The integration will not automatically sync over any data that was processed before authenticating the integration, but any activity that occurs in Classy after authentication will immediately start to flow over to Salesforce. The Classy Control Panel V2 settings should immediately be adjusted to your team's preferred state to ensure that records are created according to your organization's preferences.

Be sure to immediately **disable the integration** to stop data flow. While the integration is disabled, the Classy Control Panel V2 may continue to be edited and configured to your team's ideal state. Once these settings have been finalized and you are ready for Classy data to start flowing to Salesforce, you may easily **re-authenticate the integration** and initiate the historical sync via the Data Sync Tool.

When re-syncing historical data, it is best practice to sync from oldest to newest. This ensures that records that were created first, such as campaigns, will exist in your Salesforce environment. When transactions are re-synced later, they will be created in Salesforce with the correct record lookup fields populated. Depending on how long it takes to get your Salesforce instance stood up, you might have multiple months of data to re-sync. It is best practice to only use the Data Sync Tool for a one-month period of data at a time and sync it in batches.

Switching from Sandbox to a Production Environment

If using NPSP and GAUs, the Classy for NPSP package provides functionality that allows the Classy custom object (Classy Designation) to integrate with NPSP's GAU object and create GAU Allocations on opportunities according to what Classy Designation is on the opportunity. **This guide** walks through how to associate Classy Designations and GAUs.

The GAU record ID is used to associate Classy Designations with GAUs. Because record IDs differ between environments, when switching from Sandbox to Production, you will want to ensure that the External Reference ID field on each Program Designation in Classy Manager is updated to reflect the Production record ID so that the Classy Designation and GAU association continue seamlessly in the new Production environment.

The Classy for Salesforce integration includes a robust list of objects and fields, which can be used for customizations, flows, duplicate rules, etc. If any existing configurations refer to a previous platform's specific fields, that may cause errors when data from Classy starts syncing to Salesforce. You will want to ensure that these configurations are either edited to reflect the Classy for Salesforce fields or if configurations with external systems are still required, you may exclude the Classy integration user so that these processes do not run on data Classy syncs to Salesforce.

Next Steps

Classy offers a seamless integration that enhances your fundraising efforts, but you don't need to wait for it to be set up before you start using your new fundraising technology. By diving into Classy now, you can build your campaigns, start collecting donations, and see an early return on your investment. This allows you to maximize all the benefits that led you to choose Classy, like our intelligent fundraising tools and conversion-driving campaigns, ensuring your valuable fundraising dollars are used efficiently.

Here's how to get started:

1. Build your first campaign by following the **Getting Started with Classy** guide.
2. Launch and promote your campaign to start collecting donations.
3. Reconcile with easy-to-use reporting directly in Classy.
4. Once you are ready, set up the integration by following our provided steps!

Need help?

Classy's Care team is here to help if you need additional support.