Convio Connector for Salesforce.com™ DataSync
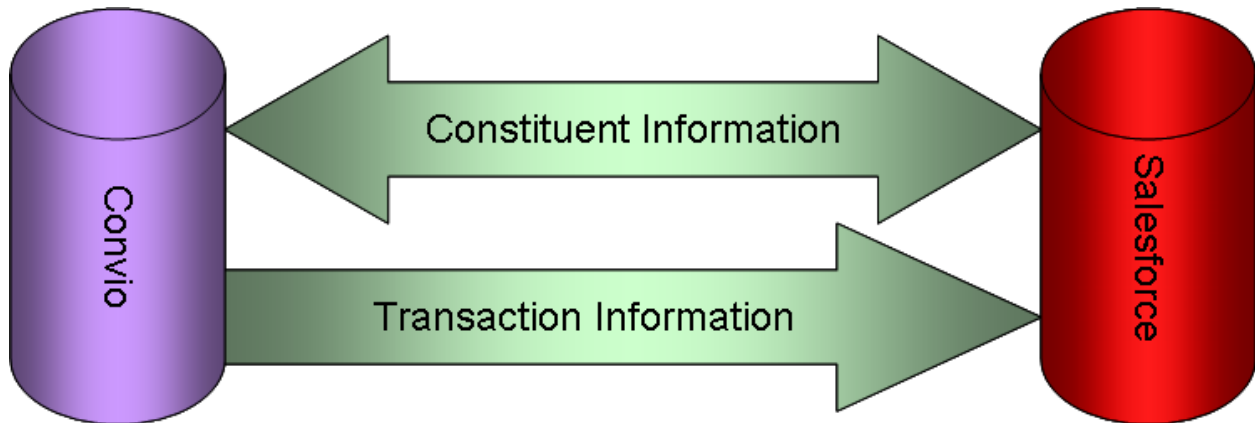
User's Guide

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Contents

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Overview

The Convio connector for Salesforce.com enables the *exchange* of constituent information between your Convio database and your Salesforce database. It also enables the *transfer* of transaction data from your Convio database to your Salesforce database, as illustrated below:

The connector thus enables your Salesforce database to serve as your database of record -- holding all of your online and offline transaction information for all of your constituents. With all transaction information in one location, you can run reports that fully analyze the effectiveness of your campaigns.

Key Points

Transaction data must be cross-referenced between the two systems before being transferred to Salesforce. That is, a donation campaign or donation form in Convio must be mapped to a specific campaign in Salesforce, so that the data can be placed in the proper "bucket."

In addition:

▶ The DataSync for Salesforce.com will typically be set up to run automatically on a daily basis. The steps described in this document are for running the DataSync manually. You should plan on running these manual steps weekly to ensure your cross-references are up-to-date and that potential duplicates are resolved.

▶ Constituents who have been identified as potential duplicates will not be exchanged until they have been resolved as a duplicate or as a new constituent.

▶ Transactions made through donation campaigns or forms that are missing cross-reference entries will not be transferred.

Running the DataSync Operation

If you have the Convio Connector for Salesforce, the DataSync operation will appear on the My DataSync Operations tab in the Import/Export application area.

To access and run the Convio Salesforce DataSync:

1. Choose **Data Management** on the navigation bar and then select **Import/Export** from the drop-down menu. The **DataSync Operation** list page will open with the **My DataSync Operations** tab selected.

    Note: You may have multiple operations listed depending on your site's unique setup.

2. Locate the **Convio Connector for Salesforce.com DataSync** operation, as shown:

3. Click **Run** in the **Actions** column to start the operation. The following **Operation Information** page will display:

Data Sync Operations | Cross-Reference Types | Resolve New Registrations

Data Sync Operations > My Data Sync Operations > Run Convio Connector for Salesforce.com DataSync

Process Navigator

1. Operation Information
2. Configure Cross-Reference Types
3. Registration Conflicts
4. Run Operation

1. Operation Information:

Review the details of the operation type you have chosen.

Operation Details

Operation:	Convio Connector for Salesforce.com DataSync
Tasks:	Initialize
	Data Formatting
	Sync new/modified Convio Constituents
	Sync new/modified SFDC Contacts
	Recurring Donation Processing
	Pledge Processing
	Donation Processing
	E-Commerce Processing
	TR Registration Txn Processing
	Link Donation to Donor
	Advocacy Response Processing
Remote System Status:	Available
Schedule:	start-time=05:00 end-time=15:00 interval=08:30

2. Operation Label:

The operation label will be used to identify this operation in the list of Operation Results. If you do not enter a label, the operation type will serve as the default label.

3. Operation Description:

The operation desription will be used to identify this operation in the list of Operation Results.

Cancel   << Previous   **Next >>**

4. Review and/or provide the following:

a **Operation Information:**

- Review the **Tasks** that comprise the DataSync operation.

- Verify that the **Remote System Status** reads *Available*, indicating that Convio can communicate with Salesforce.com through the Connector. If the status is *not* **Available**, please see the Troubleshooting section of this document.

b **Operation Label:**

- Enter an *optional* label that will identify this operation on the Operation Results page.

- Note that if you leave this field blank, the operation name will serve as the label.

c **Operation Description:**

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- Enter an *optional* description that will also help identify this operation on the Operation Results page.

- Note that if you leave this field blank, no description will be displayed on the Results page.

5. Click the **Next >>** button to move on to the **Configure Cross-Reference Types** page shown below:
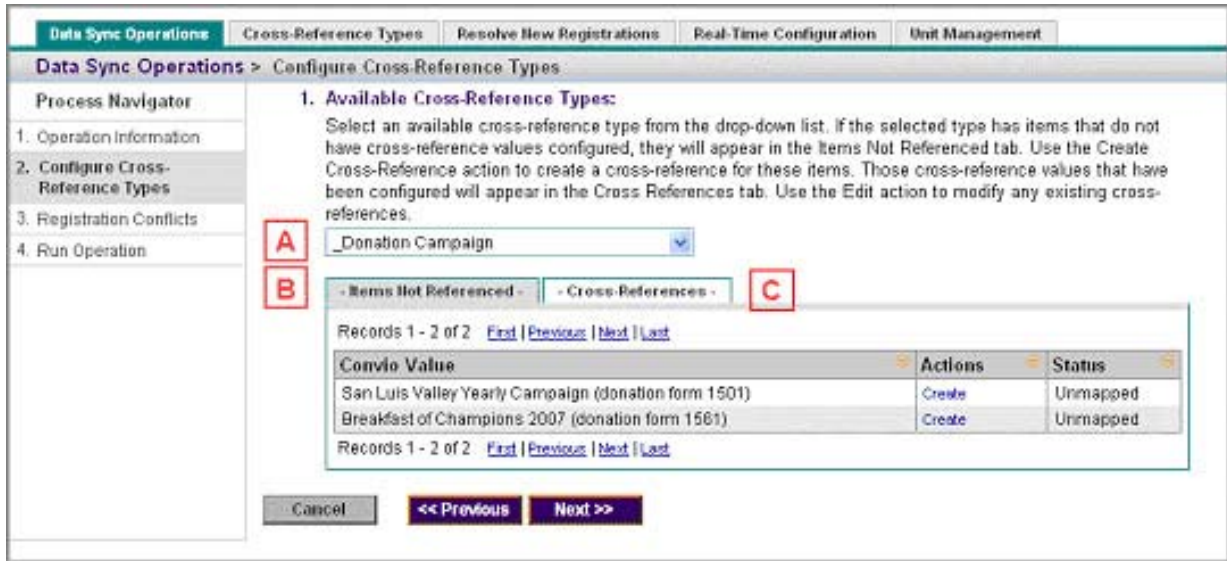
Properly defined cross-references are key to a successful DataSync. This page allows you to quickly and easily review the cross-reference tables relevant to your DataSync.

6. Verify that your cross-references are in order as follows:

    a   Select an appropriate cross-reference **type** from the drop-down list [**A**].

    Note: The cross-references you will need to check will depend on the Convio products you are using, but in most cases will be the:

    - Donation Campaign, and

    - Donation Form

    b   As you select a cross-reference type, observe the **Items Not Referenced** tab [**B**], which will populate with items of the corresponding type that are missing cross-reference entries.

    Important: Review these lists carefully. Any transactions associated with the listed items will **not** be transferred to Salesforce unless you properly record the cross-reference values.

    To add a cross-reference for any item that is not already cross-referenced:

        1)   Click the **Create** action beside the item that is missing a cross-reference.

        2)   On the page that opens, review the:

            – **Cross Reference Type**

– **Convio item** that you are cross-referencing

3) Enter or select the **foreign key(s**) that the Convio item will cross-reference.

4) Provide a **description** to identify the purpose of this cross-reference.

5) Click **Finish** to return to the list of **Items Not Referenced**. Your newly cross-referenced item will no longer appear on that tab, but should now be listed on the Cross-References tab [**C**].

c Click on the **Cross-References** tab [**C**] to review *existing* cross-reference settings for the selected type [**A**] – and any new cross-references you have just created for that type.

7. Click **Next>>** to move on to the **Registration Conflicts** page:

	New Online Record	Actions	Best Matching Online or Offline Record	Match Score	
Selected Do Not Match					
	Adams, Jean jeanadams@convio.com 10 Falcon Pl Huntinton, AR 87654 Constituent ID: 1001004	Resolve Duplicates (2)	Adams, Joan joanadams@convio.com 10 Falcon Huntington, AR 87654 Constituent ID: 1001001	Online	47
☐	Brown, Frederick frederickbrown@convio.com 17 Oak St Austin, VA 23456 Constituent ID: 1001005	Not a Match Merge	Brown, Frederick freddiebrown@convio.com 17 Oak St Austin, VA 23456 Constituent ID: 1001003	Online	82
☐	Higuero, Arnolo ahiguero@convio.com 159 North State Street Chicago, IL 60601-3601 Constituent ID: 1001007	Not a Match Match Merge	Higuero, Arnoldo arniehiguero@convio.com 159 North State Street Chicago, IL 60601-3601 Member ID: 24	Offline	51

This page lists all new constituents who appear to be duplicates of existing records. DataSync is configured to exclude from exchange processing any constituent who has been flagged as a potential duplicate of an existing Constituent360 or Salesforce.com constituent.

Therefore, you must review and resolve these new records as either matches to existing records or as new constituents before they are eligible for exchange.

Note: This is the same list that you can access through the Resolve New Registrations tab.

For the records listed, you will have the following options available:

▶ **Merge** – this action opens a page that compares the potential duplicate records, as shown:

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Biographical Information		
Field Name	**Master Record (View)**	**Duplicate Record**
Contact ID	1005432	
* User Name	devnull+barbara@convi	
Member ID		☐ 0037000000VsoMAAAZ
Exchange ID		
Origin	Data Sync	
Creation Time	Apr 8, 2008	
Last Login Time		

You can check the fields on the Duplicate Record that you would like to transfer to the Master Record before completing the Merge. (If the potential duplicate is an online record, you can also choose which record to retain as the Master.)

▶ **Match** – this action (available for Offline potential duplicates only) changes the Member ID in the online record to match the member ID in the offline (Salesforce) record, thus establishing a "linkage" between the offline and online records. By establishing this "linkage" with the member ID, both records are left intact, but all future information imported from that offline record will be placed in the corresponding online record. The potential duplicates are removed from the list immediately following the Match action.

> **Important**: If the name/address fields are the same, the **Match** action is fine as it will move the necessary ID fields. If some fields differ, then **Merge** should be selected instead.

▶ **Not a Match** – this option maintains the integrity of both the new registration and the potential duplicate and immediately removes those items from the list.

8. Resolve potential duplicates by choosing **Match**, **Merge**, or **Not a Duplicate** – keeping in mind the following as you work:

▶ In general, the **Match** action is appropriate when the records are the same and you just want to move the (Salesforce) Member ID to the Convio record. (Note that the Master record is always a Convio record.)

▶ The **Match** action is also appropriate if the fields on the Convio record contain values that you want to have update the corresponding Salesforce.com account.

▶ Select the **Merge** action when the data is slightly different and there are values on the Salesforce.com account that you want to retain. This option allows you to move any data that you want to persist onto the Convio record prior to synchronization. (Again, note that the Master record is always a Convio record.)

▶ When **Merging** constituents, it is very important that you move the Member ID carefully. This ID field contains the Salesforce ID number.

▶ The approach to merging duplicates will depend on whether the potential matches are **Offline** or **Online** records:

- **For Offline Matches**:

  − *If the Master Record ID fields have values*,

- o This situation indicates you may have duplicates in your Salesforce.com database. Resolve the Salesforce.com duplicates before proceeding and then make sure that the Convio record has the ID for the record that remains in Salesforce.com

   – *If the Master Record ID fields are blank*,

      o You *must* merge the Salesforce.com ID field

- **For Online Matches**:

   – *If both records have blank ID fields*,

      o There are no guidelines for this situation. You may merge the records as you see fit.

   – *If the Master record has blank ID fields, and the duplicate record does not*,

      o You *must* merge the Salesforce.com ID field

   – *If the Master record ID fields have values, and the duplicate record does not,*

      o Leave the existing ID values on the master record unchanged.

   For more information on resolving duplicates please see the Resolving New Registrations online help topic.

9. Click **Next>>** to go on to the **Run Operation** page:

10. Review and/or provide the following:

    a **Operation Review:**

- This section lists the different tasks that comprise the current DataSync operation. Review this section once again.

- The **Remote System Status** indicates whether or not Convio can communicate with Salesforce.com through the Connector. If the status is *not* Available, the operation will not run. Please see the Troubleshooting section of this document in the event it is not available.

    b **Email Notification:**

- This is an optional field. If you specify your address, you will automatically receive a message when the operation finishes. The email will contain a report of the results of the operation.

11. Click the **Submit Operation** button to queue the DataSync operation to run. You will be taken to the Operation Results page where you can monitor the progress of this operation. If you have specified a notification email address, you will be notified when the operation finishes.

Viewing the Operation Results

All DataSync operations that have been submitted are listed on the Operation Results page. You can find information there about the status of each operation as well as a Process Summary for each. In addition, you will find a link to View a more detailed Report of each operation.

The Operation Results Page

The **Operation Results** page displays your running and completed DataSync operations. You will automatically be taken to this page when you Submit an Operation, but you can also return to the page at any time.

To access and navigate the Operation Results page:

1. Choose **Data Management** on the navigation bar and then select **Import/Export** from the drop-down menu. The **DataSync Operation** list page will open with the **My DataSync Operations** tab selected.

2. Click the **Operation Results** tab. A typical Results page might look something like the following:

3. While the operation is still in progress, observe the following:

► When first submitted, your DataSync operation will be in **Queued** status [**A**]. To get the latest status, click **Refresh List** [**B**].

► As the DataSync operation runs, the **Process Summary** column will indicate the progress [**C**]. At any time, if you would like to get more *detailed* information on the progress of the operation, you can click on the **View Report** link [**D**]

4. When the operation finishes:

► The **Status** column will display the word **Succeeded** and additional information and links will become available, as shown below:

► The **Available Files** column [**B**] will offer links for all the download files in operations that generate them. The Salesforce.com DataSync operations *do not* consume or generate data files so this column will remain empty.

► The **Actions** column [**C**] will display from one to three links, as follows:

- **View Report**

  – This link will always display.

  – Click on this link to see a detailed report on the results of the DataSync operation.

- **Errors**

- This link will display if errors were encountered with the file that was uploaded to Convio from Salesforce.com*.

  o Errors for gift records may be recorded in multiple files. Hover your mouse over the link to get a detailed description of the file contents.

- This link will take you to a CSV file that contains the record that generated the error and the error message.

- See the troubleshooting section of this document for information on specific errors and their suggested resolution.

*Note that up to 7.csv error files may be generated, including:

- Errors encountered when writing Salesforce contact records to Convio

- Errors encountered when writing constituent records to Salesforce.com

- Errors encountered when writing donation records to Salesforce.com

- Errors encountered when writing recurring donation records to Salesforce.com

- Errors encountered when writing pledge records to Salesforce.com

- Errors encountered when writing TeamRaiser registration records to Salesforce.com

- Errors encountered when writing eCommerce purchase records to Salesforce.com

- Errors encountered when writing Action Alert response records to Salesforce.com

The View Report Page

The View Report page for each operation provides more detailed information about that operation, as shown in the example below:

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| Data Sync Operations | Cross-Reference Types | Resolve New Registrations |

Data Sync Operations > View Report

▸ Refresh List

This operation will synchronize your Convio and Salesforce.com databases.

Summary

Number of constituents reformatted to Title Case.	0
Number of addresses updated with standardized version.	0
Salesforce.com: New contacts added	0
Salesforce.com: Contacts updated	0
Convio: New constituents added	0
Convio: Existing constituents updated	0
Salesforce.com: Number of recurring donations added.	0
Salesforce.com: Number of pledges added.	0
Salesforce.com: Number of donations added.	0
Salesforce.com: Number of store purchases added.	0
Salesforce.com: Number of Registration transactions added.	0
Salesforce.com: Number of donation contact roles added.	0
Number of transactions held back because of missing Cross-Reference (XREF) entries	360
Salesforce.com: Number of advocacy responses added.	34
Salesforce.com: Number of donation contact roles that could not be added due to errors.	4
Number of advocacy responses held back because of missing Cross-Reference (XREF) entries	402

Data Files

Upload Files

Output Files

Errors and Collisions

convio_to_sf_advocacy_errors.csv

Operation Details

Beginning Initialize	
Ending Initialize	
Beginning Data Formatting	
Ending Data Formatting	
Number of constituents reformatted to Title Case.	0
Number of addresses updated with standardized version.	0

This report page is divided into the following sections:

▶ **Summary**

- The summary section provides counts for key processing steps.

- Pay particular attention to any entries that start with "**Number of transactions not downloaded**…" These entries typically indicate that there are missing cross-references that need to be supplied. See the **Operation Details** section of the page for more details on what was missing.

▶ **Data Files**

- This section provides a consolidated view of all the files that are available on the **Operation Results** page. (Although there are no *transfer* files generated with this operation, this section may display any *error* files that were generated.)

▶ **Operation Details**

- This section provides a sequential log of the DataSync operation's actions.

- The information in this section is used in the **Summary** section mentioned above.

- The most important information in this section is the *report of missing cross-references*. Remember that transactions for campaigns, forms, or stores that are missing cross-reference entries will be held back and not transferred to Salesforce. The following illustrates how the Donation Processing section of this page might appear if any cross-references are missing:

```
Beginning Donation Processing
Donation Classic Campaign "AHS Capital Campaign" is not mapped to a Salesforce Campaign                              XREF
Donation Classic Campaign "Membership Campaign" is not mapped to a Salesforce Campaign                              XREF
Donation Classic Campaign "AHS Tributes" is not mapped to a Salesforce Campaign                                     XREF
Donation Classic Campaign "Step Towards Recovery" is not mapped to a Salesforce Campaign                            XREF
Donation Classic Campaign "Memorial Campaign" is not mapped to a Salesforce Campaign                                XREF
Donation Classic Campaign "AHS Membership Campaign" is not mapped to a Salesforce Campaign                          XREF
Donation Classic Campaign "AHS Membership Campaign (Member Center)" is not mapped to a                              XREF
Salesforce Campaign
Donation Classic Campaign "Mother's Day Campaign" is not mapped to a Salesforce Campaign                            XREF
Donation Classic Campaign "AHS e-Store" is not mapped to a Salesforce Campaign                                      XREF
Donation Classic Campaign "American Health Society" is not mapped to a Salesforce Campaign                          XREF
Donation Classic Campaign "Matching Gift Pledge Drive" is not mapped to a Salesforce Campaign                       XREF
Donation Classic Campaign "California Chapter Membership" is not mapped to a Salesforce Campaign                    XREF
250 records processed [13:54:53]
Ending Donation Processing
```

These transactions will be sent to Salesforce once the cross-reference is defined. (Note that the sync will need to be re-run once the cross-reference is defined. For most clients, this will be done automatically by the scheduled recurring DataSync job. You can, however, run the sync manually at any time.)

Cross-Reference Guide

There are a number of cross-references utilized by the Connector when generating export files. Their purpose is to translate code values from Convio into code values that are meaningful to Salesforce.com.

For example, when importing gifts into Salesforce.com, it is important to specify valid codes for the Campaign, Fund, Designation fields. Using cross-reference tables in Convio, you are able to designate which codes to send to Salesforce.com based on how the online transaction was captured.

Currently, the Salesforce.com DataSync only processes action alert responses and transactions made through donation campaigns and forms or e-commerce stores. These cross-references are discussed in more detail below.

Donation Cross-References

For each individual transaction, the Salesforce.com Campaign, Record Type, Fund and Program Designation will be determined based on the Convio Donation Campaign, Donation Form, and eCommerce Store cross-references. For each field below, DataSync will evaluate the listed data sources in the order listed and use the *first* cross-reference value found.

▶ **Salesforce Campaign** (required)

    1. For Donations:

        a   Donation Form Cross-Reference

        b   Donation Campaign Cross-Reference

    2. For Stores

        c   eCommerce Store Cross-Reference

    3. For Advocacy

        a   Action Alert Cross-Reference

▶ **Salesforce Record Type**

    1. For Donations

        a   Donation Form Cross-Reference

        b   Donation Campaign Cross-Reference

    2. For Stores

        a   eCommerce Store Cross-Reference

▶ **Salesforce Fund**

    1. For Donations

        a   Donation Form Cross-Reference

        b   Donation Campaign Cross-Reference

   2. For Stores

      a   eCommerce Store Cross-Reference

▶ **Salesforce Program Designation**

   1. For Donations

        a   Donation Form Cross-Reference

        b   Donation Campaign Cross-Reference

   2. For Stores

      a   eCommerce Store Cross-Reference

In other words, for each Salesforce parameter, if you provide a cross-reference value to a Convio Donation Form, that cross-reference will override any cross-reference to a Convio Donation Campaign.

Troubleshooting Guide

The following sections can help you resolve the more common issues that you can encounter when running a Salesforce.com DataSync operation.

Remote System Status is Unavailable

If the remote system is unavailable, the following illustrates what you will see when reviewing the operation details. Note that the Remote System Status is displayed on both the first and last pages of the process flow when running the operation manually.

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Operation Details	
Operation:	Convio Connector for Salesforce.com DataSync
Tasks:	Initialize
	Data Formatting
	Sync new/modified Convio Constituents
	Sync new/modified SFDC Contacts
	Recurring Donation Processing
	Pledge Processing
	Donation Processing
	E-Commerce Processing
	TR Registration Txn Processing
	Link Donation to Donor
	Advocacy Response Processing
Remote System Status:	Unavailable
Schedule:	start-time=05:00 end-time=15:00 interval=08:30

When this message displays, it indicates that Convio is unable to communicate successfully with your Salesforce.com database through the Connector application.

Often, this system status is just a temporary condition due to network congestion or other brief outages. Please *wait for a few minutes and try again* before taking additional diagnostic steps.

If the remote system status remains in the Unavailable state for an extended period of time, then you will need to verify that the Salesforce.com username and password being used by Convio to access the Salesforce.com API are still active and valid.

Salesforce has also implemented a trusted network security model for managing API access. Please ensure that the Convio IP range has been "whitelisted" within your Salesforce instance. The Convio IP address ranges are:

   66.45.103.0 – 66.45.103.127 (66.45.103.0/25 CIDR format)

   209.163.168.192 - 209.163-168.255 (209.163.168.192/26 CIDR format)

Resolving Errors Generated During Processing (errors csv file)

The following table provides possible solutions for error messages that can appear in the errors file:

Error Message	Resolution
Email address contains invalid characters; valid characters are letters, digits, '-', '_', '@', '.', '%', and ':'	In Salesforce.com, correct the email address for the record that generated this error. The corrected record will be updated in Convio the next time you run the DataSync.
Email address must be in the format name@host.domain	In Salesforce.com, correct the email address for the record that generated this error. The corrected record will be updated in Convio the next time you run the DataSync.
Illegal character in domain	The email address contains an illegal character in the domain portion (the part after the @ sign) of the address. Correct the address in Salesforce.com. The corrected record will be updated in Convio the next time you run the DataSync.
The MEMBER_ID on this record (######) matched multiple Constituent360 records. Only one match is allowed. Please merge the duplicate records with this MEMBER_ID in Convio. *or,* Two matching records were found when searching by Member ID and Exchange ID. Only 1 match is permitted. Record rejected.	Within DataSync, MEMBER_ID represents the Salesforce.com Constituent ID (ConsID). This message indicates that there are duplicate records in Convio for the given ConsID. ***To correct this error***: a Choose **Constituent360** on the navigation bar and then select **Contacts** from the drop-down menu. b In the **Cons ID** field, enter the value (######) noted in the error message. Be sure to check the box for **Include removed contacts in search results**. c Click the **Find** button. Multiple records should be displayed. d Identify the record that should be one single record with the specified ConsID. (This is a subjective judgement call.) e Edit the remaining records to remove the ConsID and, if applicable, remove the record.
Two matching records were found when searching by Email. Only 1 match is permitted. Record	For sites configured to have unique email addresses, this message indicates that the email

rejected.	address on the current record was found on multiple existing records.
	To correct this error:
	a Choose **Constituent360** on the navigation bar and then select **Contacts** from the drop-down menu.
	b In the **Email** field, enter the email address from the error record and then click the **Find** button. Multiple records should be displayed.
	c Identify the "master" record and click on the icon to edit it. (This is a subjective call based on which seems to be the best record.)
	d Next, click the **Find Duplicates** link.
	e In the resulting pop-up window, click the **Select** button and then proceed with the duplicate merge processing.

Frequently Asked Questions

Following are answers to a few frequently asked questions (FAQs) that you may find helpful:

When should I use the Donation Campaign cross-reference vs. the Donation Form cross-reference?

Cross-reference entries made at the Donation Campaign level will be applied to all transactions made through forms associated with that campaign. You should set up cross-reference values for all active Donation Campaigns.

Optionally, you can also set up cross-reference entries for individual Campaign Forms. If you specify a Salesforce.com Campaign, Record Type, Fund or Program Designation for a form, then the values specified will override any values specified at the Campaign level. If you omit a value at the Form level, then the value from the Campaign level will be used. For example, if you only specify the Campaign for a form, then the remaining values (Record Type, Fund and Program Designation) will be drawn from the Donation Campaign cross-reference entry.

Why aren't my transactions being synchronized?

There are a number of reasons why a transaction might not synchronize, including the following:

1. A cross-reference is missing.

   ▶ Cross-references are essential for the proper recording of gifts within Salesforce.com. For the gifts that were not downloaded, verify that the corresponding donation campaign or form is properly cross-referenced. You should also check the DataSync Report to see if any missing cross-references are noted.

2. The donor is being held back as a potential duplicate.

   ▶ Newly registered donors who have been identified as potential duplicates will not be downloaded nor will any related transactions be downloaded until the potential duplicate is resolved. Please verify that the gifts that were not downloaded are from a constituent who is not identified as a potential duplicate (see **Resolving New Registrations**)

3. The transaction was an ACH (e-check) transaction.

   ▶ ACH transactions are verified differently from credit card transactions. While credit-card transactions are approved online in real-time and settle daily, ACH transactions take longer. ACH transactions are considered successful if no failures are reported within three days. Consequently, ACH transactions are only available for DataSync processing three days after they occur. Verify that the missing transaction was not an ACH transaction that occurred within three days of the DataSync process date.

Why aren't new constituents being downloaded?

There are three types of new constituents who are not downloaded from your website:

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1. Potential Duplicates

   ▶ The most likely reason is that the donor is being held back as a potential duplicate. Newly registered donors who have been identified as potential duplicates will not be downloaded nor will any related transactions be downloaded until the potential duplicate is resolved. Please verify that the constituent in question has not been identified as a potential duplicate. (see **Resolving New Registrations**)

2. Non-donors

   Note: During Site Connector configuration, clients can opt to include only donors or all constituents. Based on that choice, this section may or may not apply.

   ▶ To be considered for download, a constituent must have conducted a qualifying online transaction. Qualifying transactions are:

      a   An on-line financial transaction (donations only, at this time)

      b   Registration for a TeamRaiser event (no financial transaction required)

      c   An action alert response

3. Site Administrators

   ▶ Constituents who are site administrators are never included in downloads