

Salesforce Integration

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Salesforce Integration Definitions: **Fuzzy Look Up** – Is when a record is sent over to Salesforce, it does a look up on the following: Email -OR- First Name, Last Name and Address -OR- First Name, Last Name and Phone Number. **Lookup Only** – when a field is marked as “For Look up Only” and a record is sent to Salesforce, it will skip the Fuzzy look up above and only use this field to lookup and see if a record exists. (Note – this field will not get update in Salesforce because it is meant to be static and exist in both systems. **Insert** – will populate only new records **Update** – will populate new records & overwrite existing records with the most recent data. **Unmapped Fields** – if no updates should occur at all the field should not be mapped. **GradLeaders Configuration: School > Settings > Salesforce Settings:** **Salesforce Username** – this field needs to come from the school **Salesforce Password** – this field needs to come from the school. The password with security token should be provided. (Note: Security token from SF is sent by email when requested. Path > Development > My Personal Information > Reset my Security Token) **Data Modification** – select what the school wants: Update / Insert – populates new records and updates existing records Update Only – updates only existing records Insert Only – updates only new records **Attach default resumes to Profiles in Salesforce** – this field is only used when sending candidate data to Salesforce. **Salesforce Create Profile in Program:** A new PID should be added for Salesforce Candidate Pull. This Salesforce PID should be selected in this DDL **Agent Import Companies From Salesforce:** – select enable if you want Company data to flow from salesforce into GradLeaders Career Center **Agent Import Recruiters From Salesforce:** – select enable if you want Recruiter data to flow from salesforce into GradLeaders Career Center **Agent Import Profiles From Salesforce:** – select enable if you want Candidate data to flow from salesforce into GradLeaders Career Center **Agent Export Companies To Salesforce:** – select enable if you want Company data to flow from GradLeaders Career Center to Salesforce **Agent Export Recruiters To Salesforce:** – select enable if you want Recruiter data to flow from GradLeaders Career Center to Salesforce **Agent Export Profiles To Salesforce:** – select enable if you want Candidate data to flow from GradLeaders Career Center to Salesforce **Control > School Tab > Salesforce Mappings > Questions Mapping:** **Set up your Entity Types:** **Company** – Select the Company Field from the Salesforce Type List **Recruiter** – Select the Recruiter Field from the Salesforce Type List **Profile** – Select the Student Field from the Salesforce Type List **Click on Each Entity Type and start mapping the fields where you want data to flow to or from GradLeaders Career Center.** **Mapping Each Question:** **Select the Salesforce question For Look up only** – see definition above. These should be static fields in both systems that do not change and used for seeing if the contact exists. No data will get updated/populated **For Insert Only** – see definition above. If you select this, then only new records will be populated with data from this field. **Default Value** – To be entered when no value is found in SF Question. Also can be entered when a default value is required if SF may contain null value. **Mapping Each Answer if list question:** Click on the Answers Mapped (example: 38/132) Click on the school answer and then select the appropriate Salesforce answer and hit save. **Mapping Required Questions: Control > School Tab > Salesforce Mappings > Salesforce Required Questions:** Required questions are displayed in the Salesforce Required Questions tab. A default value can be entered for questions that are not mapped.

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