

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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