TryBooking - Salesforce Integration Guide

Prepared by Eepsita Das and Padmaja Mugundhu Baskaran

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Overview

When your TryBooking account is connected to a Salesforce account and with the TryBooking app installed, TryBooking can upload the details of the bookings made for your events to Salesforce. TryBooking's integration with Salesforce allows you to fully utilise your TryBooking data inside Salesforce.

Whenever TryBooking gets integrated into Salesforce and is synced to a Salesforce Org, it creates an account with the default naming format "TryBooking – Name of Account" (e.g. TryBooking – Blaze Your Trail). This naming format is not suitable for NPSP's account record naming convention. To achieve the expected outcome we built a record-triggered flow in Salesforce. This Flow updates account records without the prefix 'TryBooking'.

Steps to Follow

Step 1

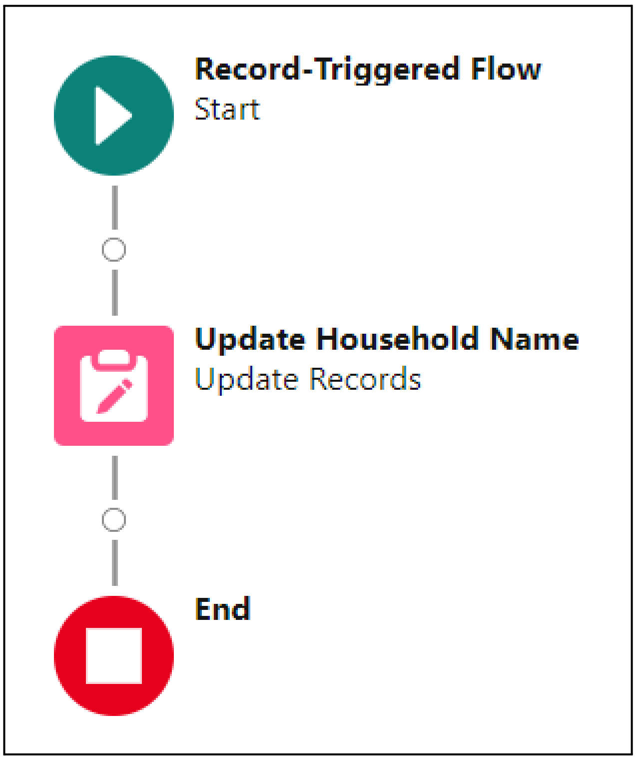
- To install the TryBooking app in your Salesforce account, click the here link in the Salesforce Account Details tab.

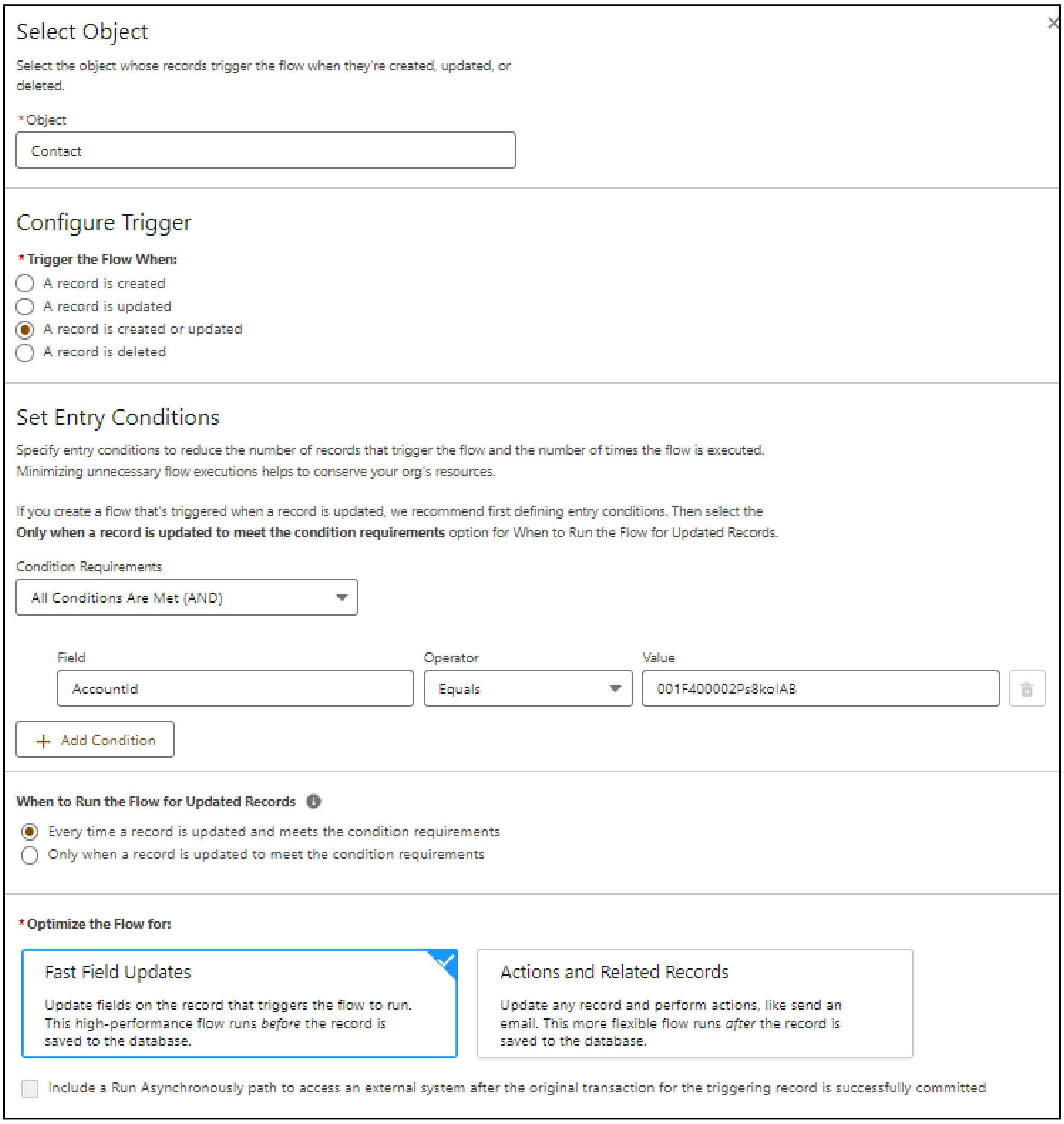
Step 2

- Create a New Account in Salesforce under the organisation record type.
- e.g. name it like **TRYBOOKING INTEGRATION DO NOT DELETE - Blaze Your Trail.**

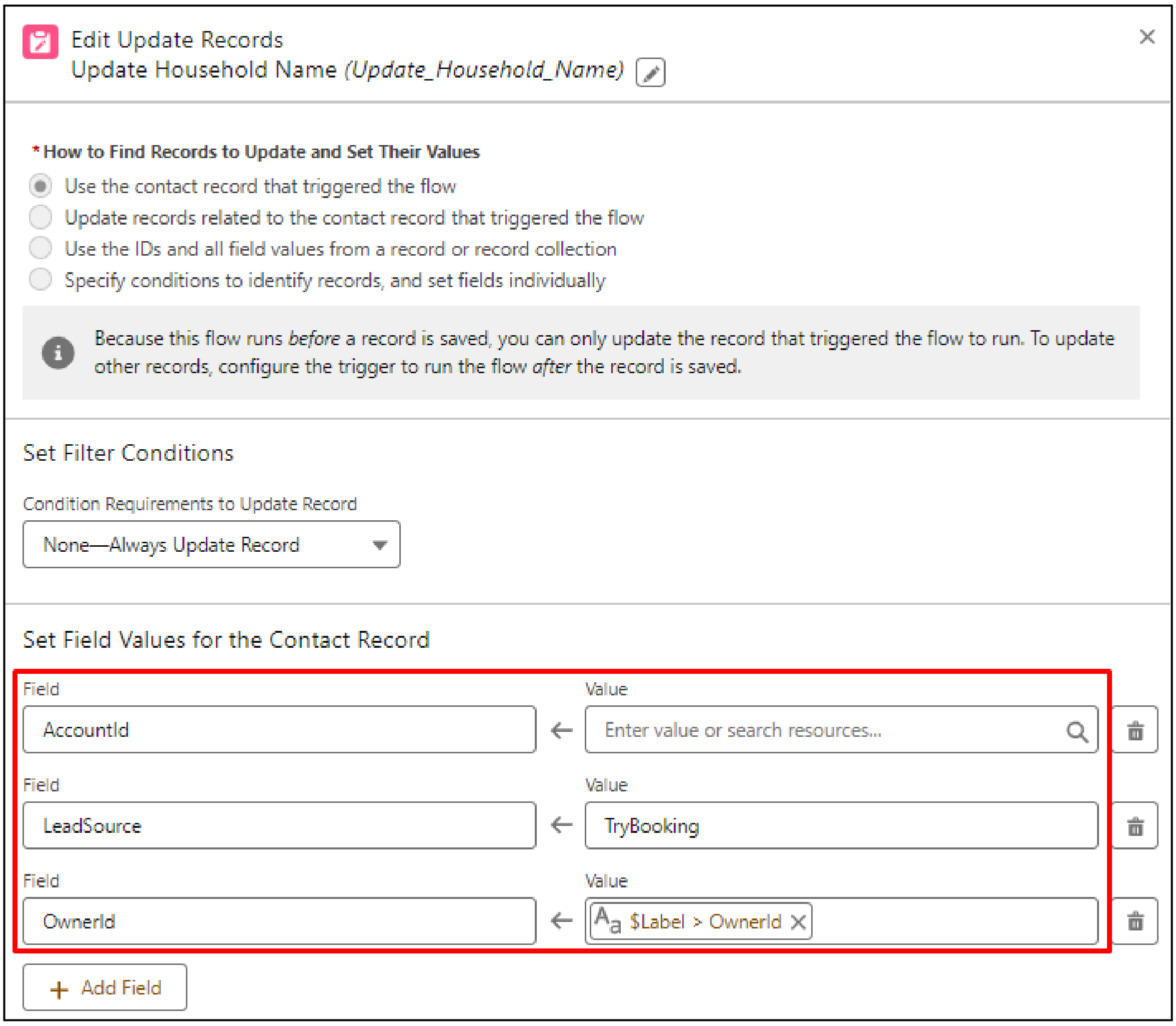
Step 3

- Create a new Record Triggered Flow in Salesforce and configure it as given below.



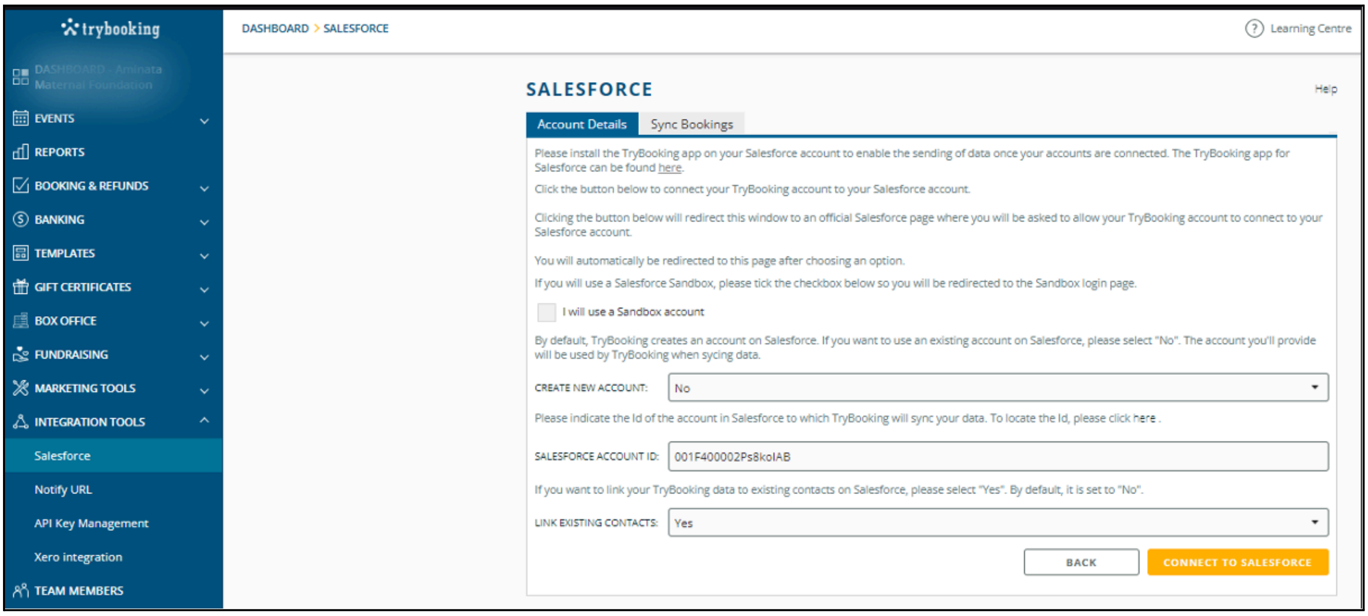


- In the flow's entry condition, we are giving the ID of the account (**TRYBOOKING INTEGRATION DO NOT DELETE - Blaze Your Trail**) which was created in Step 2.



Step 4

- Login to your TryBooking account and go to “Integration Tools”. Select Salesforce and choose option **CREATE NEW ACCOUNT: NO SALESFORCE ACCOUNT ID:** (Here we are giving the account ID which was created in Step 2)
- **LINK EXISTING CONTACTS: YES** (We wanted here to update the existing contacts. By default it’s set to No.)
- Now Click on “CONNECT TO SALESFORCE” and select “allow access”.

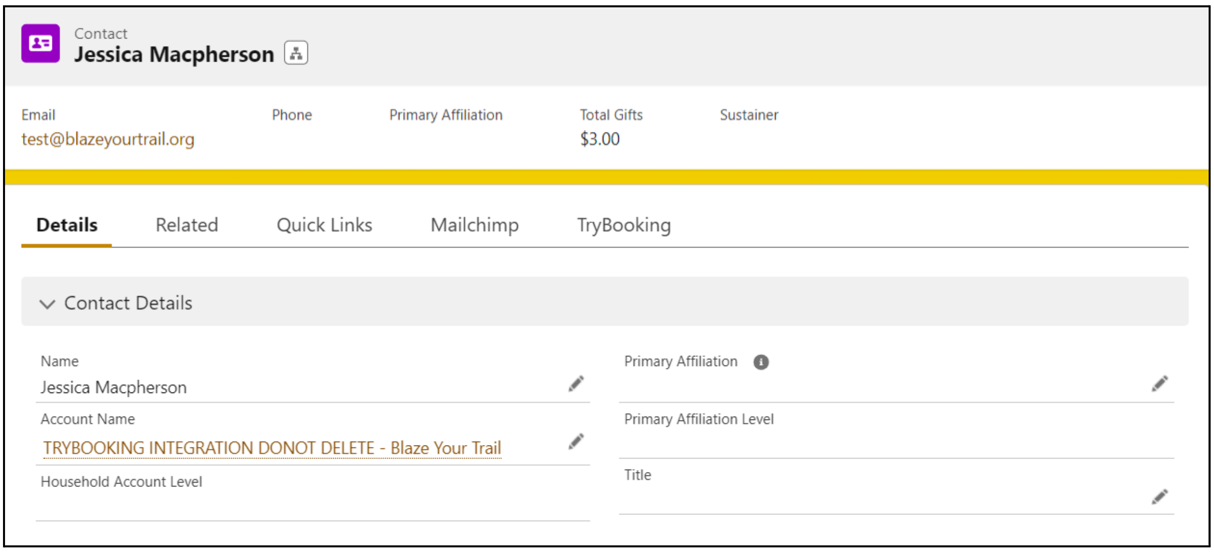


Step 5

- Once the connection is made it's time to sync the events. Select the event Name and select Sync. Once it's synced we will get a notification email from Trybooking.

Step 6

- After the bookings sync to the Salesforce account the event will get stored under the TRYBOOKING EVENTS object. The contacts will be stored as a related list under the account record that we created in Step 2.
- Please refer to the below image: (Before Flow updates the record)



- As we are required to create the new account records based on the salesforce NPSP's naming convention, we configured our flow to update the contact's AccountId with the blank space. Once the flow updates, the account record's name gets updated again based on the salesforce NPSP naming convention - with the suffix 'Household'.
- Refer to the image below: (After Flow updates the record)