

TryBooking – Salesforce Integration Guide

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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

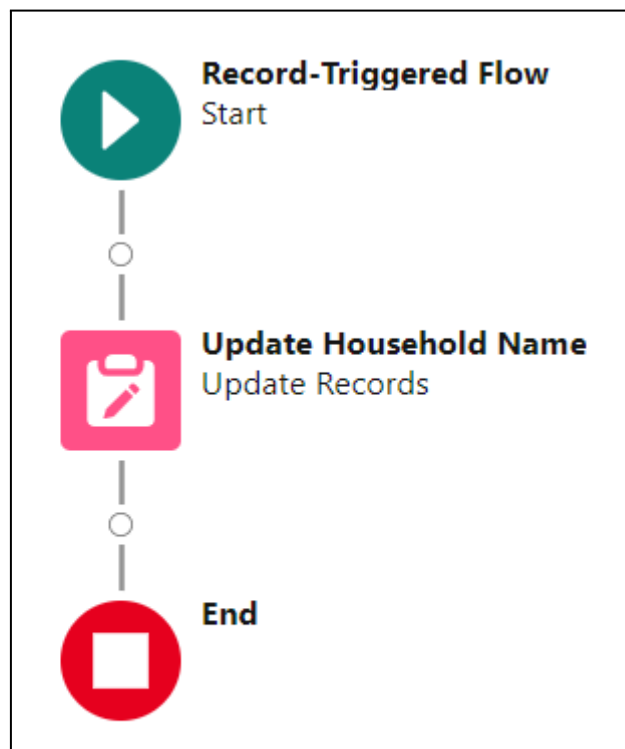
- To install the TryBooking app in your Salesforce account, click the [here](#) link in the Salesforce Account Details tab.

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.



Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Contact

Configure Trigger

* Trigger the Flow When:

A record is created
 A record is updated
 A record is created or updated
 A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field	Operator	Value
AccountId	Equals	001F400002Ps8koIAB

+ Add Condition

When to Run the Flow for Updated Records

Every time a record is updated and meets the condition requirements
 Only when a record is updated to meet the condition requirements

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

- 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.

Edit Update Records
✕

Update Household Name (*Update_Household_Name*)

***How to Find Records to Update and Set Their Values**

Use the contact record that triggered the flow
 Update records related to the contact record that triggered the flow
 Use the IDs and all field values from a record or record collection
 Specify conditions to identify records, and set fields individually

Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▼

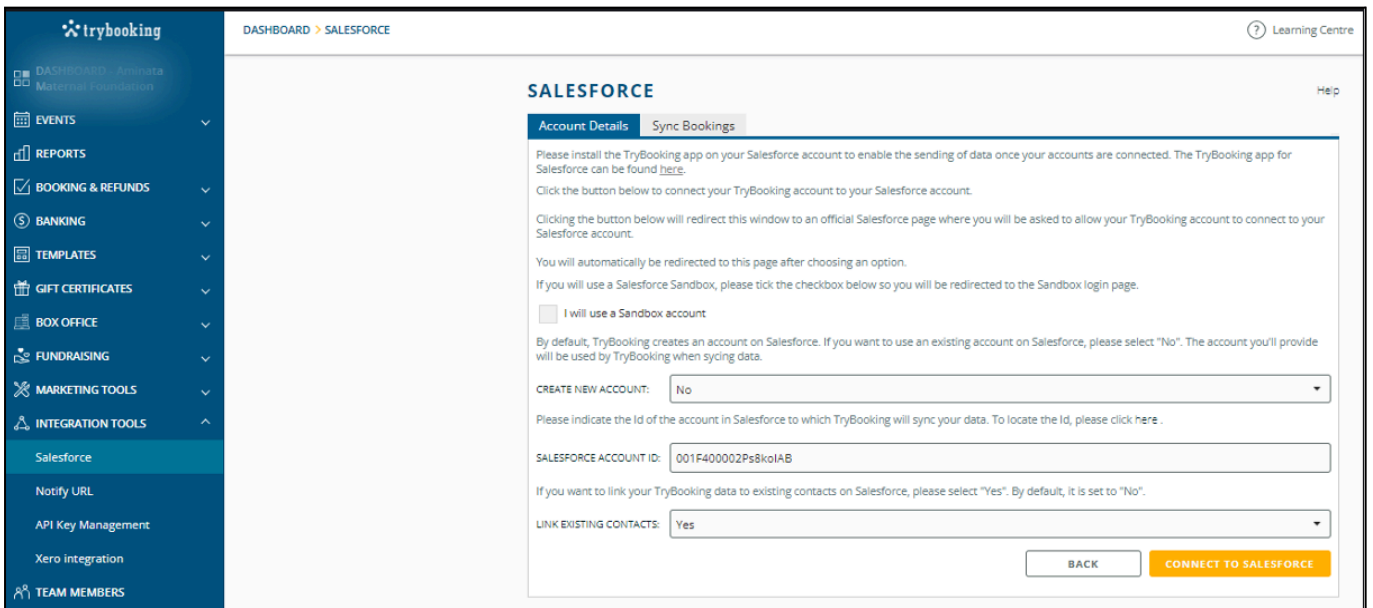
Set Field Values for the Contact Record

Field		Value	
AccountId	←	Enter value or search resources...	
LeadSource	←	TryBooking	
OwnerId	←	\$Label > OwnerId ✕	

+ Add Field

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”.

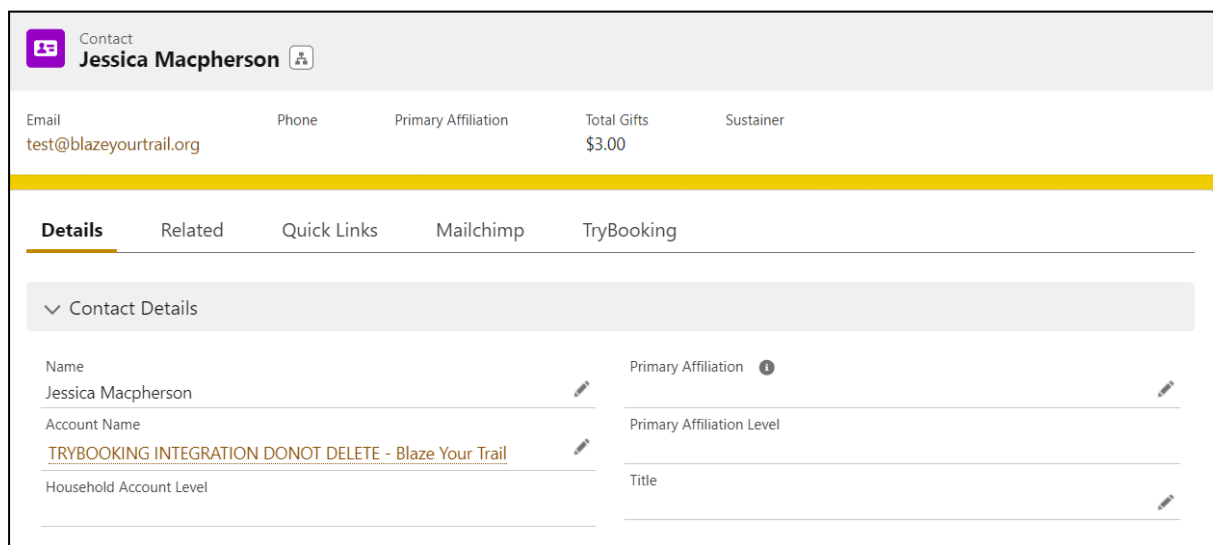


Step 5

- 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)

