

TryBooking - Salesforce Integration Guide

Prepared by <u>Eepsita Das</u> and <u>Padmaja Mugundhu Baskaran</u> 29 April 2024

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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 <u>here</u> 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 deleted.	d, updated, or	
* 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	r the flow and the number of time	s 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 rec	ommend first defining entry cond	itions. Then select the
Only when a record is updated to meet the condition requirement	nts option for When to Run the Flo	pw for Updated Records.
Condition Requirements		
All Conditions Are Met (AND)		
Field C	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 record is updated to meet the condition record.	quirements	
O only when a record is updated to meet the condition requi	rements	
* Optimize the Flow for:		
Fast Field Updates	Actions and Rela	ited Records
Update fields on the record that triggers the flow to run.	Update any record a	nd perform actions, like send an
This high-performance flow runs before the record is	email. This more flex	tible flow runs after the record is
	saved to the databas	
Include a Run Asynchronously path to access an external sy	ystem after the original transact	tion 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_Househol	d_No	nme) 🖉	×
 *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 trigg Use the IDs and all field values from a record or record Specify conditions to identify records, and set fields incompared 	ered t collec	he flow :tion ally	
Because this flow runs <i>before</i> a record is saved, you other records, configure the trigger to run the flow	can o <i>after</i> f	nly update the record that triggered the flow to run. To update the record is saved.	
Set Filter Conditions Condition Requirements to Update Record None—Always Update Record			
Set Field Values for the Contact Record			
AccountId] ←	Value Enter value or search resources Q	
Field		Value	_
LeadSource	∫←	Тгувоокіпд	â
Field		Value	
Ownerld	←	A _a \$Label > OwnerId ×	â
+ 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".

🛠 trybooking	DASHBOARD > SALESFORCE
DASHBOARD - Aminata Maternal Foundation	SALESFORCE Help
📰 events 🗸 🗸	Account Details Sync Bookings
	Please install the TryBooking app on your Salesforce account to enable the sending of data once your accounts are connected. The TryBooking app for Salesforce are be found here.
🗹 BOOKING & REFUNDS 🛛 🗸	Click the button below to connect your TryBooking account to your Salesforce account.
⑤ BANKING ↓	Clicking the button below will redirect this window to an official Salesforce page where you will be asked to allow your TryBooking account to connect to your Salesforce account.
📰 TEMPLATES 🗸 🗸	You will automatically be redirected to this page after choosing an option.
🛗 GIFT CERTIFICATES 🗸 🗸	If you will use a Salesforce Sandbox, please tick the checkbox below so you will be redirected to the Sandbox login page.
🧾 BOX OFFICE 🗸 🗸	I will use a Sandbox account
😴 FUNDRAISING 🗸 🗸	By default, TryBooking creates an account on Salesforce. If you want to use an existing account on Salesforce, please select "No". The account you'll provide will be used by TryBooking when sycing data.
💥 MARKETING TOOLS 🗸 🗸	CREATE NEW ACCOUNT: No
人 INTEGRATION TOOLS へ	Please indicate the Id of the account in Salesforce to which TryBooking will sync your data. To locate the Id, please click here.
Salesforce	SALESFORCE ACCOUNT ID: 001F400002Ps8koIAB
Notify URL	If you want to link your TryBooking data to existing contacts on Salesforce, please select "Yes". By default, it is set to "No".
API Key Management	LINK EXISTING CONTACTS: Yes
Xero integration	BACK CONNECT TO SALESFORCE
റ്റ് TEAM MEMBERS	

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)

Gontact Jessica Macpherse	on 🖪					
^{nail} st@blazeyourtrail.org	Phone	Primary Affiliation	Tota \$3.1	al Gifts 00	Sustainer	
Details Related	Quick Links	Mailchimp	Try	Booking		
V Contact Details Name Jessica Macpherson				Primary Affiliat	ion 🚯	,
Account Name TRYBOOKING INTEGRATION DONOT DELETE - Blaze Your Trail Household Account Level		Primary Affiliation Level				

 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'.

Contac Jessi	t ca Macphers	son 📠						
mail est@blazeyo	urtrail.org	Phone	Primary Affiliation	Tota \$3.1	I Gifts)0	Sustainer		
Details	Related	Quick Links	Mailchimp	Try	Booking			
Name Jessica Ma	cpherson				Primary A	filiation ()		
Account Name Jessica Macpherson Household				Primary Affiliation Level Title				
Household A	ccount Level				Inte			

• Refer to the image below: (After Flow updates the record)