

# Salesforce Integration Update 5/3/23

This release contains some major improvements and bug fixes for the Integration Exchange (iX) and Salesforce integration. Get prepared to encounter some enhanced functionality and some long awaited corrections the next time you dive into some iDonate - Salesforce integration work!

## Recurring Schedule changes

iDonate has made iX more responsive to donors changing their recurring donation schedules. Throughout an organization's fiscal year, donors with recurring donations can change their schedules in ways that affect the year's expected installments. The following changes will trigger iX to recompute a SF opportunity's amount (and possibly the close date):

1. Donation amount.
2. Donation frequency (e.g., weekly to monthly).
3. Schedule expiration (e.g., terminating the recurring donations before the fiscal year ends.)
4. Shifting the next payment date (e.g., if a donor's next payment is one month from today and the donor shifts the next payment to a later date).

So, organization's may see adjustments to their SF opportunities as donors change their schedules. Likewise, organizations may see adjustments to their SF opportunities if they use iX's transaction history grid to reprocess transactions. When iX reprocesses recurring donations, it will locate the donor's schedule and adjust SF opportunities as needed. Here are the SF opportunity values that iX will adjust based on recurring schedule changes:

1. Amount
2. Close Date
3. Stage

## Adjustments to Historical Transactions

iX will be more closely attuned to the organization's fiscal year as defined in Salesforce Company Settings. A new functionality change has been introduced in regards to the fiscal year – by default iX will no longer re-process transactions from closed fiscal years. If an organization selects a transaction from the transaction history grid to reprocess and the transaction is from a previous fiscal year, iX will simply disregard the request. However, iX will make it possible for organizations to override this policy. Here are the steps:

1. Login to GMS as an admin user and navigate to Integration Exchange/Integrations (iX).
2. Click the Configure button on the Salesforce integration card to access the integration's configurations.
3. Click the Definitions tab to access the integration's definition settings.

4. Locate the Closed Fiscal Year Adjustments definition and turn the definition ON.
5. Click Update on the Salesforce Configure screen.
6. Select any transaction on the history grid to reprocess.

**IMPORTANT:** iX will log the user's username when the Closed Fiscal Year Adjustments definition is turned ON. The responsibility for changes made to transactions from closed fiscal years is on the individual overriding this policy.

### **Additional Info**

Improvements have been made to the way that the integration handles creating recurring donations in Salesforce. There is a lot of complexity in the process of setting up a recurring schedule and updating the data each time a payment is made in the recurring schedule. As mentioned earlier, our logic has been tightened up so users will see the recurring data as described in the Salesforce Integration Guide.

Users will now see a Close Date equal to the last day of the fiscal year according to that Salesforce org's Company Settings.

Resolved issues that some clients experienced that affected transactions from event purchases, multi-designation transactions and recurring schedules.