Salesforce Integration Process

The following is a process for getting your Donately data integrated with Salesforce.

Step: Donately Webhook Flows

> **Event: account.donation.create.success**

- Create / Update Donor (Contact)
- Create / Update Donation (Opportunity)
- Create / Update Subscription (if recurring donation)

> **Event: account.donation.update.success**

- Create / Update Donor (Contact)
- Create / Update Donation (Opportunity)

> **Event: account.person.pii.update.success**

- Create / Update Donor (Contact)

> **Event: account.subscription.update.success**

- Update Subscription Status on all related Donations (Opportunities)

Create / Update Donor (Contact)

Donately Webhook Field	Salesforce Group	Salesforce Object Name	Salesforce Field Name	Salesforce Field Type
donation.person.id	Donately Properties	Contact	dntly_PersonId__c	Custom Text
donation.person.email	Contact Properties	Contact	Email	Standard
donation.person.first_name	Contact Properties	Contact	FirstName	Standard

Donately Webhook Field	Salesforce Group	Salesforce Object Name	Salesforce Field Name	Salesforce Field Type
donation.person. last_name	Contact Properties	Contact	LastName	Standard
donation.person. phone_number	Contact Properties	Contact	Phone	Standard
donation.person. street_address	Contact Properties	Contact	MailingStreet	Standard
donation.person. city	Contact Properties	Contact	MailingCity	Standard
donation.person. state	Contact Properties	Contact	MailingState	Standard
donation.person. country	Contact Properties	Contact	MailingCountry	Standard
donation.person. zip_code	Contact Properties	Contact	MailingPostalCo de	Standard
<combined address fields>	Donately Properties	Contact	dntly_FullAddres s__c	Custom Text
<donately account id>	Donately Properties	Contact	dntly_AccountId __c	Custom Text
<salesforce account id>	Contact Properties	Contact	AccountId	Standard

Note: AccountId is only set when creating a new contact or updating a contact that has no existing AccountId. This prevents contacts from being moved between Salesforce Accounts inappropriately.

Create / Update Donation (Opportunity)

Donately Webhook Field	Salesforce Group	Salesforce Object Name	Salesforce Field Name	Salesforce Field Type
$500 Donation	Deal Properties	Opportunity	Name	Standard

Donately Webhook Field	Salesforce Group	Salesforce Object Name	Salesforce Field Name	Salesforce Field Type
donation.person.id	Donately Properties	Opportunity	dntly_PersonId__c	Custom Text
donation.id	Donately Properties	Opportunity	dntly_DonationId__c	Custom Text
donation.amount	Deal Properties	Opportunity	Amount	Standard
donation.currency	Donately Properties	Opportunity	dntly_Currency__c	Custom Text
donation.livemode	Donately Properties	Opportunity	dntly_Livemode__c	Custom Boolean
donation.donation_type	Donately Properties	Opportunity	dntly_DonationType__c	Custom Text
donation.processor	Donately Properties	Opportunity	dntly_Processor__c	Custom Text
donation.donation_date	Deal Properties	Opportunity	CloseDate	Standard Date
donation.status	Donately Properties	Opportunity	dntly_DonationStatus__c	Custom Text
donation.transaction_id	Donately Properties	Opportunity	dntly_TransactionId__c	Custom Text
donation.recurring	Donately Properties	Opportunity	dntly_RecurringFrequency__c	Custom Text
donation.anonymous	Donately Properties	Opportunity	dntly_Anonymous__c	Custom Boolean
donation.on_behalf_of	Donately Properties	Opportunity	dntly_OnBehalfOf__c	Custom Text

Donately Webhook Field	Salesforce Group	Salesforce Object Name	Salesforce Field Name	Salesforce Field Type
donation.tracking_codes	Donately Properties	Opportunity	dntly_TrackingCodes__c	Custom Text
donation.meta_data	Donately Properties	Opportunity	dntly_Metadata__c	Custom Textarea
donation.dtd_company_name	Donately Properties	Opportunity	dntly_DtdCompanyName__c	Custom Text
donation.comment	Donately Properties	Opportunity	dntly_Comments__c	Custom Text
donation.description	Deal Properties	Opportunity	Description	Standard
donation.form.id	Donately Properties	Opportunity	dntly_FormId__c	Custom Text
donation.subscription.id	Donately Properties	Opportunity	dntly_SubscriptionId__c	Custom Text
donation.subscription.recurring_frequency	Donately Properties	Opportunity	dntly_RecurringFrequency__c	Custom Text
<donately account id>	Donately Properties	Opportunity	dntly_AccountId__c	Custom Text
<salesforce account id>	Deal Properties	Opportunity	AccountId	Standard
<salesforce contact id>	Deal Properties	Opportunity	ContactId	Standard

Donately Webhook Field	Salesforce Group	Salesforce Object Name	Salesforce Field Name	Salesforce Field Type
"Closed Won" (configurable)	Deal Properties	Opportunity	StageName	Standard
<salesforce owner id>	Deal Properties	Opportunity	OwnerId	Standard

Note: OwnerId is set for new donations only to prevent errors with certain Salesforce Flow configurations.

StageName Configuration

The StageName field is configurable via the NativeIntegration settings to accommodate different Salesforce configurations:

Setting	Description	Default
`donation_stage_name`	Stage for **one-time donations**	`"Closed Won"`
`recurring_donation_stage_name`	Stage for **recurring donations**	Falls back to `donation_stage_name`

Default Behavior (no configuration):

- One-time donations → `"Closed Won"`
- Recurring donations → `"Closed Won"`

NPSP Configuration:

Salesforce orgs with NPSP may have validation rules that prevent using "Closed Won" without Payment Schedule records. To fix this, configure both settings to use "Pledged":

native_integration.settings = {

 'donation_stage_name' => 'Pledged',   # One-time donations

 'recurring_donation_stage_name' => 'Pledged'   # Recurring donations

}

native_integration.save

This allows donations to be created without triggering NPSP validation errors.

Update Subscription (Opportunity)

Donately Webhook Field	Salesforce Group	Salesforce Object Name	Salesforce Field Name	Salesforce Field Type
subscription.status	Donately Properties	Opportunity	dntly_SubscriptionStatus__c	Custom Text

Note: When a subscription status changes, all Opportunities with matching `dntly_SubscriptionId__c` are updated with the new status.

Create / Update Account

Donately Webhook Field	Salesforce Group	Salesforce Object Name	Salesforce Field Name	Salesforce Field Type
account.title	Account Properties	Account	Name	Standard
account.id	Donately Properties	Account	dntly_AccountId__c	Custom Text

Note: The Salesforce Account is found or created during integration initialization and is used to link Contacts and Opportunities.