



Grant strategies to bridge the divide between
grant-seekers and **grant-makers**



HOW TO

How To: 1. Connecting Strategic Grants GEM Portal to Salesforce

Version: 1.0



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How To: Connecting Strategic Grants GEM Portal to Salesforce

This How To details the steps you need to follow to set up your connection between the

Strategic Grants GEM Portal

and

Salesforce

This is a once off process.

Once the connection has been established between the two software systems you will be able to push Funder / Grants data from GEM Portal into Salesforce.

Requirements

- Purchase the GEM Portal Salesforce connector through the Salesforce App Exchange
- Let your Strategic Grants contact know that you have purchased the App. Someone at Strategic Grants has to enable the interface connection in the backend database before it will work in Salesforce. Speak to your Strategic Grants Client Manager about organising for this to occur.
- The person in your organisation doing the initial Salesforce side of the setup must be a Salesforce Administrator

After you have purchased and set up the connector, refer to the associated document

GEM Portal HowTo 2. Using the Salesforce Interface

for an explanation of how the connection between the two systems works.

Steps for connecting Strategic Grants GEM Portal to Salesforce

Salesforce steps

Purchase the Strategic Grants GEM Portal Salesforce connector through the Salesforce AppExchange.

You can find it here:

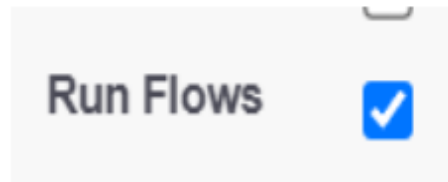
<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000GwF0GUAV&preview=%222022-01-19T03%3A54%3A40.000Z%22>

Request your Salesforce Administrator to install the app into your Salesforce environment

The app needs to be installed into your Salesforce by a Salesforce Administrator who has sufficient security admin privileges.

The app will install a Salesforce custom object and associated Salesforce Flows.

The app requires the following permissions for base Salesforce users to be able to interact with it:



Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
GEMP Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GEM Portal Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GEM Portal Grants	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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GEM Portal steps

Advise your Strategic Grants Client Manager that you have purchased the connector app

Strategic Grants has to switch on access within our database before you will be able to push grants data from GEM Portal into Salesforce.

As soon as you have advised us and we have confirmed your purchase of the app, we will enable the connection.

Log in to your Strategic Grants GEM Portal and connect the App within GEM Portal

Now that the connection has been enabled by Strategic Grants, log in to your GEM Portal and connect the app.

Ensure that your Salesforce Administrator has installed the Salesforce app before completing these once off GEM Portal set up steps.

Strategic Grants Pty Ltd | ABN 58 140 784 943

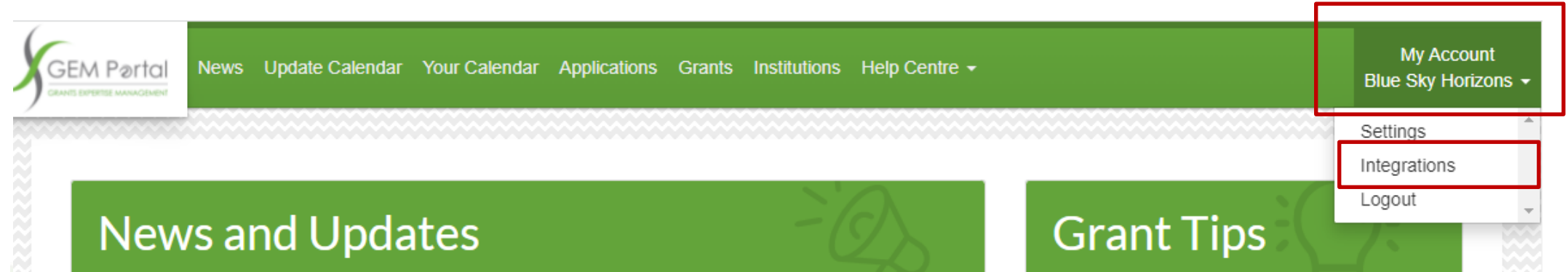
PO Box 589
Annerley Qld 4103

Australia P: 07 3892 1150
New Zealand P: 09 801 0433

E: info@strategicgrants.com.au www.strategicgrants.com.au [f /strategicgrants](https://www.facebook.com/strategicgrants)
E: info@strategicgrants.co.nz www.strategicgrants.co.nz [t /strategicgrants](https://www.tumblr.com/strategicgrants)

Within **GEM Portal**, click on your organisation name (**My Account** in top right hand corner of GEM Portal)

Select the option called **Integrations**:



GEM Portal
GRANTS EXPERTISE MANAGEMENT

News Update Calendar Your Calendar Applications Grants Institutions Help Centre ▾

My Account
Blue Sky Horizons ▾

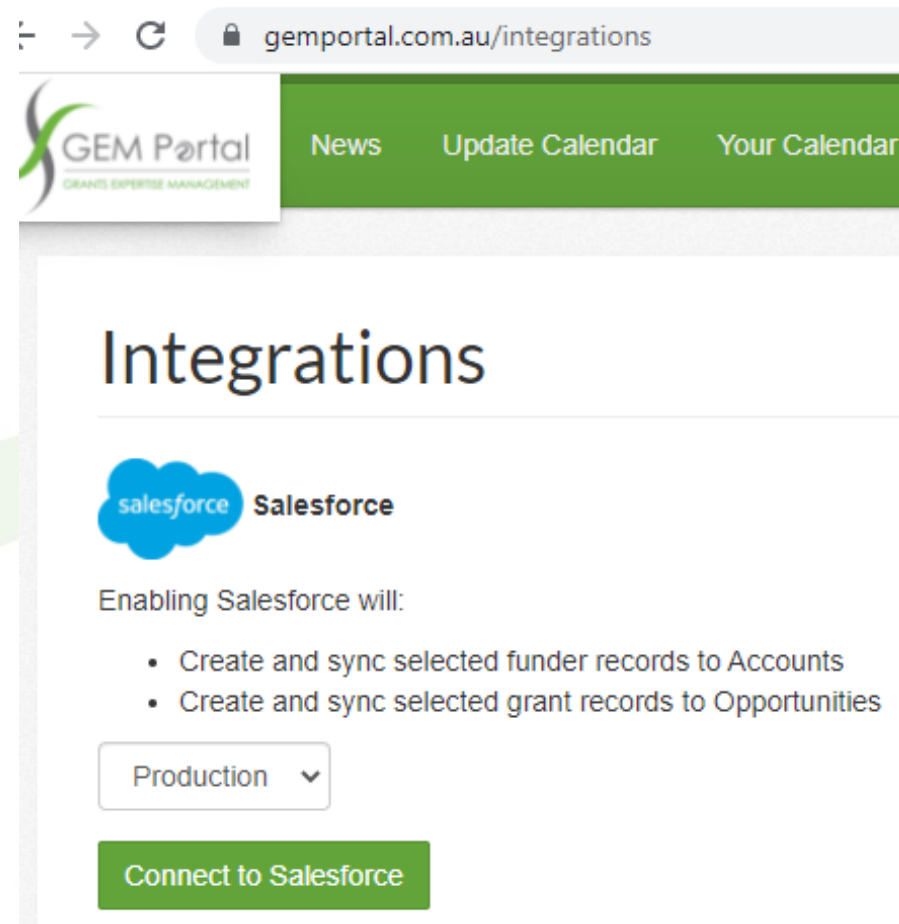
Settings
Integrations
Logout

News and Updates

Grant Tips

If your Strategic Grants Client Manager has enabled the integration, you will be presented with the following screen.

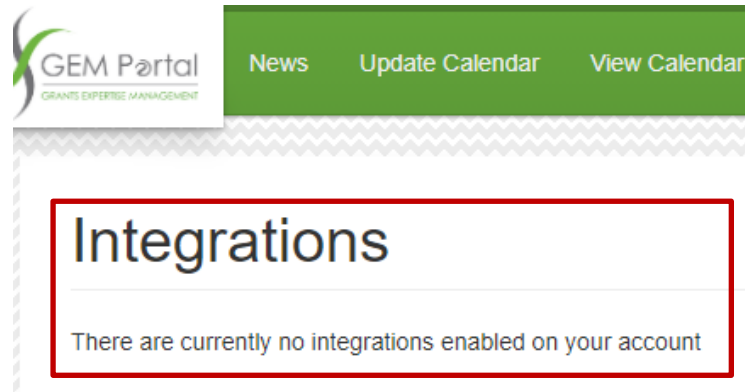
You will see a green **Connect to Salesforce** button:



The screenshot shows a web browser window with the URL gemportal.com.au/integrations. The page header includes the GEM Portal logo and navigation links for News, Update Calendar, and Your Calendar. The main heading is "Integrations". Below this, the Salesforce logo is displayed with the text "Salesforce". Underneath, it states "Enabling Salesforce will:" followed by a bulleted list: "Create and sync selected funder records to Accounts" and "Create and sync selected grant records to Opportunities". A dropdown menu is set to "Production". At the bottom of the integration section is a prominent green button labeled "Connect to Salesforce".

If the connection has not been switched on by Strategic Grants, you will see a screen like this advising

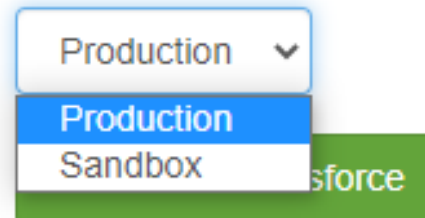
“There are currently no integrations enabled on your account”



If this occurs, contact Strategic Grants for assistance.


Connect to Production or Sandbox?

You have the option to connect to a Sandbox if you would like to first test the interface and develop the provided Salesforce Flows



Select the default option of **Production** or change to **Sandbox**.

Click the **Connect to Salesforce** green button.

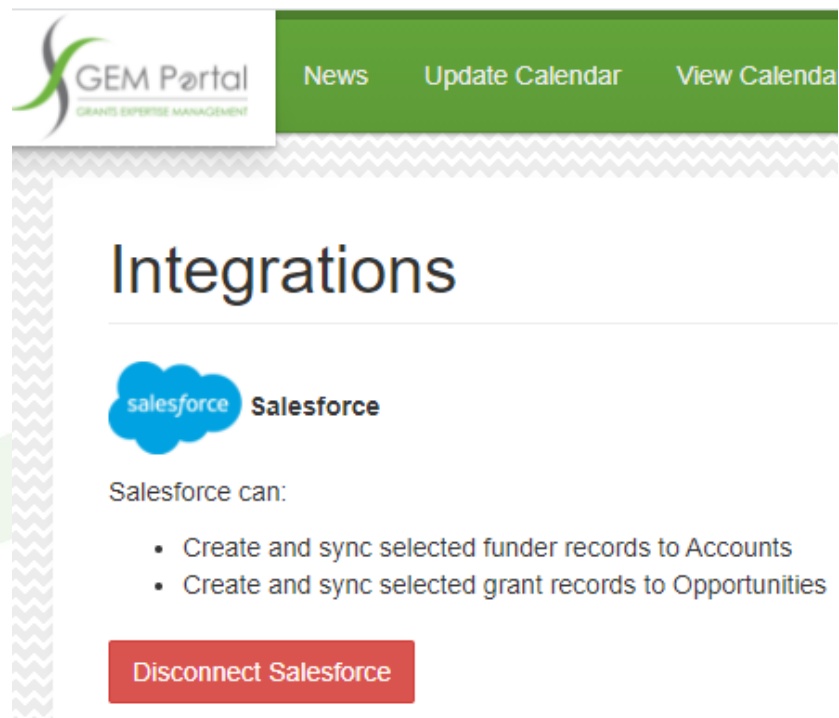


Connect to Salesforce

Once the authorisation process is complete, you will be returned to the **GEM Portal: Integrations** screen.

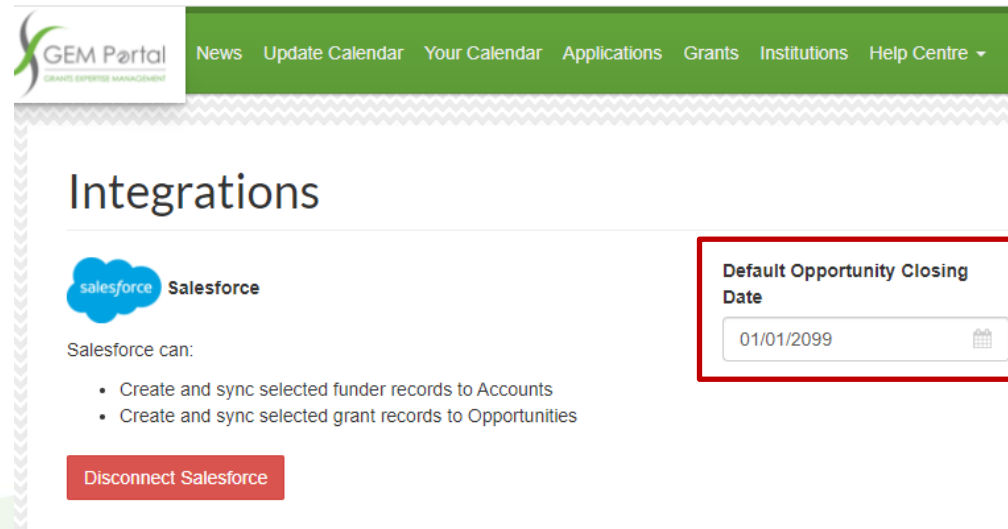
If the connection process has been successful, you will see a red button that is titled **Disconnect Salesforce**.

(Don't click the big red button !)



The screenshot shows the GEM Portal interface. At the top left is the GEM Portal logo with the tagline 'GRANTS EXPERTISE MANAGEMENT'. To its right is a green navigation bar with links for 'News', 'Update Calendar', and 'View Calendar'. Below the navigation bar is a section titled 'Integrations'. Under this section, there is a blue cloud icon with the Salesforce logo and the text 'Salesforce'. Below this, it says 'Salesforce can:' followed by a bulleted list: 'Create and sync selected funder records to Accounts' and 'Create and sync selected grant records to Opportunities'. At the bottom of this section is a prominent red button labeled 'Disconnect Salesforce'.

You will notice a field called **Default Opportunity Closing Date:**



GEM Portal
GRANTS EXPERTISE MANAGEMENT

News Update Calendar Your Calendar Applications Grants Institutions Help Centre

Integrations

salesforce Salesforce

Salesforce can:

- Create and sync selected funder records to Accounts
- Create and sync selected grant records to Opportunities

Disconnect Salesforce

Default Opportunity Closing Date
01/01/2099

We have set the default date to 01/January/2099.

If you use our **Create Opportunity Salesforce Flow button** in Salesforce to create a Salesforce Opportunity, and if our grant record doesn't have a Closing Date set (for example it may be a By Invitation grant record) it will use the Default Opportunity Closing Date to set the Salesforce Opportunity close date.

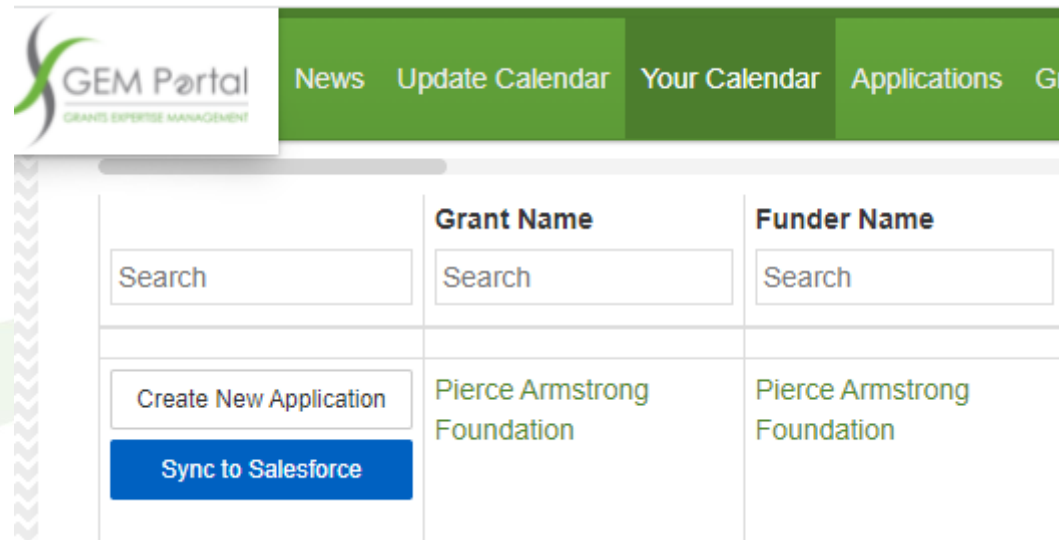
Depending on your organisations business rules, you may want to change this date.

For example, if you set By Invitation Opportunities to “end date of your financial year”, then set the default value in here to be your Financial Year Close Date.

Confirmation that the connection between systems has been established.

As confirmation that the connection has been enabled and established between GEM Portal and Salesforce, open the GEM Portal **Your Calendar** screen.

You will see that there are now blue buttons in the first column of **Your Calendar** with the text “**Sync to Salesforce**”



Don't click the Sync to Salesforce button ... not quite yet !

You have completed the **once-off** process to establish a connection between GEM Portal and Salesforce.

Now you should refer to the accompanying document titled
GEM Portal HowTo 2. Using the Salesforce Interface.

[Contact the Strategic Grants Team](#) any time if you need additional support.