



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



# HOW TO

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

## 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/listingDetail?listingId=a0N4V00000GwF0GUAV&tab=e>

**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.

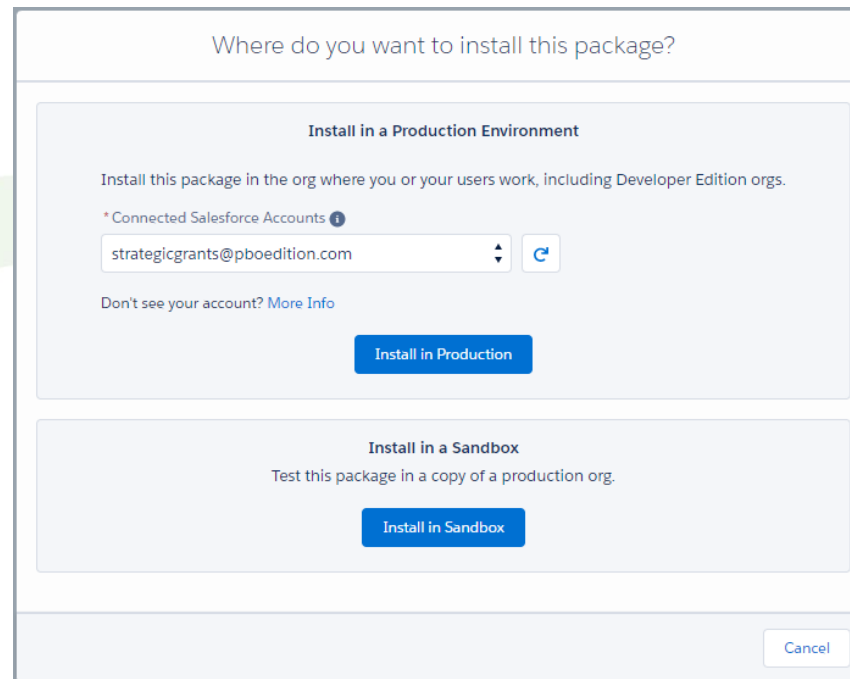
The app will install a Salesforce Custom Object, Salesforce Flows and Custom Settings.

Go to

<https://appexchange.salesforce.com/listingDetail?listingId=a0N4V00000GwF0GUAV&tab=e>

and click **Get It Now**

You will be asked where you would like to install the package. It is recommended that you first install into a **Sandbox** so that you can test the app within your Salesforce environment. Then later instal into **Production**.



Where do you want to install this package?

**Install in a Production Environment**

Install this package in the org where you or your users work, including Developer Edition orgs.

\* Connected Salesforce Accounts ⓘ

strategicgrants@pboedition.com

Don't see your account? [More Info](#)

**Install in Production**

**Install in a Sandbox**

Test this package in a copy of a production org.

**Install in Sandbox**

[Cancel](#)

Confirm your installation details and click the button to Confirm and Install

Confirm Installation Details

*i* Review the [customization guide](#) for installation and configuration steps.

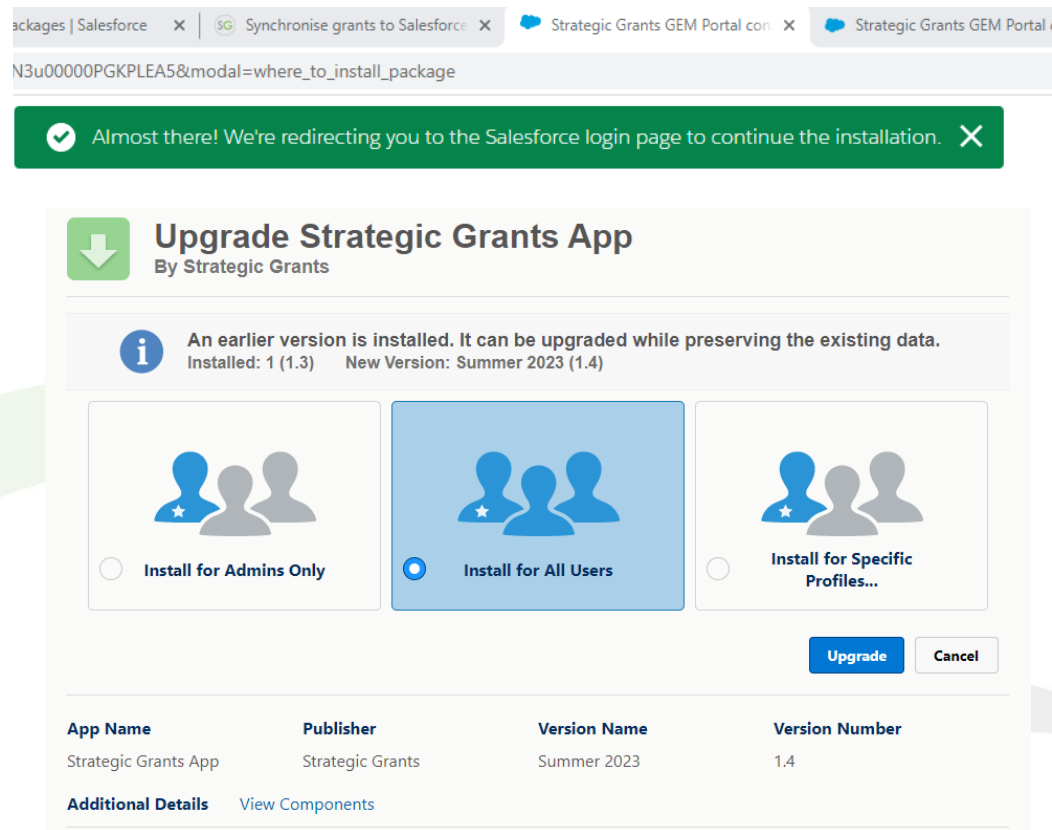
Package	Version
Strategic Grants App (Summer 2023 / 1.4.0)	Summer 2023 / 1.4.0
Subscription	Organization
Paid	Strategic Grants
Duration	Number of Subscribers
Does Not Expire	Site-wide
Username	
strategicgrants@pboedition.com	

☐ I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. [Learn More about the AppExchange Security Review.](#)

Cancel
Confirm and Install

You will be asked for which group of users you would like to install the GEM Portal to Salesforce Connector. Depending on how you have set up your security groups will determine which option you choose. The connector is primarily of benefit to those people in your organisation who are using the Strategic Grants GEM Portal grants calendar. However, there is no harm in making it accessible to all users across your organisation.



You can View the Components that will be installed by clicking on View Components:

App Name	Publisher
Strategic Grants App	Strategic Grants
<b>Additional Details</b>	<a href="#">View Components</a>



## Package Components

### Package Components

#### ▼ Pages (2)

Action	Component Name	Parent Object	Component Type	Installation Notes
Update	strategicGrantsComponent		Lightning Web Component Bundle	This is an upgraded component. It will be updated to the new version.
Update	GEMP_Contact_Record_Page		Lightning Page	This is an upgraded component. It will be updated to the new version.

#### ▼ Fields (5)

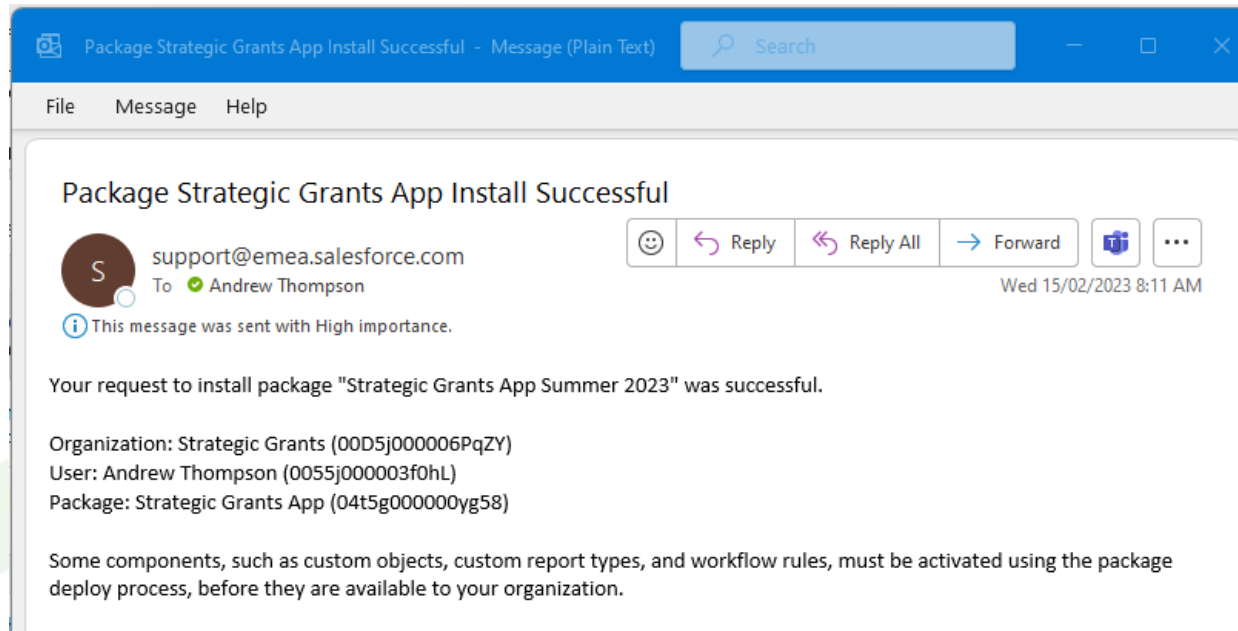
Action	Component Name	Parent Object	Component Type	Installation Notes
Create	DefaultOpportunityDate	DefaultOpportunityDate__c	Custom Field	This is a brand new component.
Create	StageName	StageName__c	Custom Field	This is a brand new component.
Create	Account Name	GEM Portal Grant	Custom Field	This is a brand new component.
Create	Funder Website	GEM Portal Grant	Custom Field	This is a brand new component.
Update	GEM Portal Grant (Deprecated)	Account	Custom Field	This is an upgraded component. It will be updated to the new version.

#### ▼ Resources (9)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Update Contact	GEMP Contact	Button or Link	This is a brand new component.
Create	Update Account	GEM Portal Grant	Button or Link	This is a brand new component.
Update	Create Opportunity	GEM Portal Grant	Button or Link	This is an upgraded component. It will be updated to the new version.
Create	Update Opportunity	GEM Portal Grant	Button or Link	This is a brand new component.
Create	Create Contact	GEMP Contact	Button or Link	This is a brand new component.
Update	Images		Static Resource	This is an upgraded component. It will be updated to the new version.
Create	GEMP Contact Layout 2023	GEMP Contact	Page Layout	This is a brand new component.
Update	Create Account	GEM Portal Grant	Button or Link	This is an upgraded component. It will be updated to the new version.
Create	GEM Portal Grant Layout 2023	GEM Portal Grant	Page Layout	This is a brand new component.

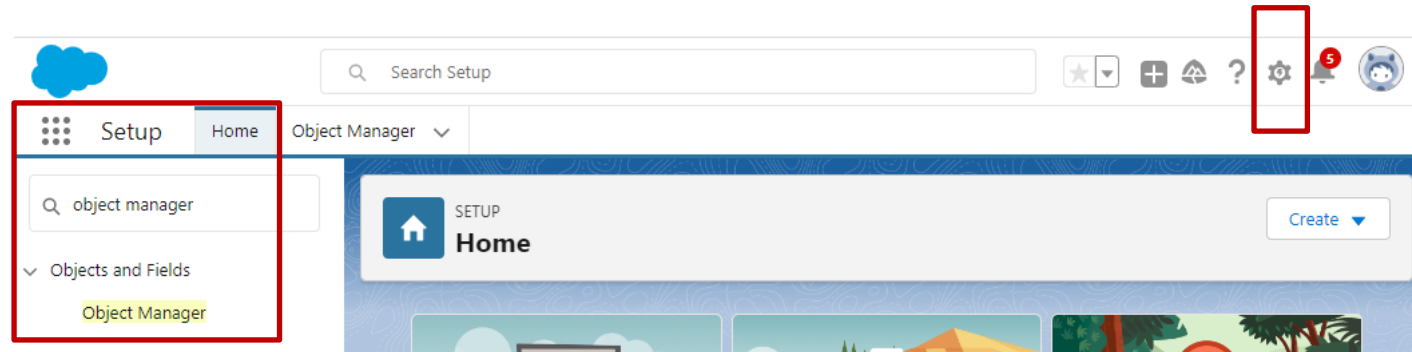
▼ Apps (1)				
Action	Component Name	Parent Object	Component Type	Installation Notes
Update	Strategic Grants		Connected App	This is an upgraded component. It will be updated to the new version.
▼ Objects (2)				
Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Stage Name		Custom Object	This is a brand new component.
Create	Default Opportunity Date		Custom Object	This is a brand new component.
▼ Flows (7)				
Action	Component Name	Parent Object	Component Type	Installation Notes
Create	GEM Portal Flow - Create Account		Flow Version	This is a brand new component.
Create	GEM Portal Flow - Create Contact		Flow Version	This is a brand new component.
Create	GEM Portal Flow - Update Account		Flow Version	This is a brand new component.
Create	GEM Portal Flow - Update Opportunity		Flow Version	This is a brand new component.
Create	GEMP Grants Flow (Deprecated)		Flow Version	This is a brand new component.
Create	GEM Portal Flow - Create Opportunity		Flow Version	This is a brand new component.
Create	GEM Portal Flow - Update Contact		Flow Version	This is a brand new component.
Remote Access				
No records to display				

On successful installation of the package you will likely be notified by email:



## Salesforce Objects

In the Object Manager under Setup you will find:

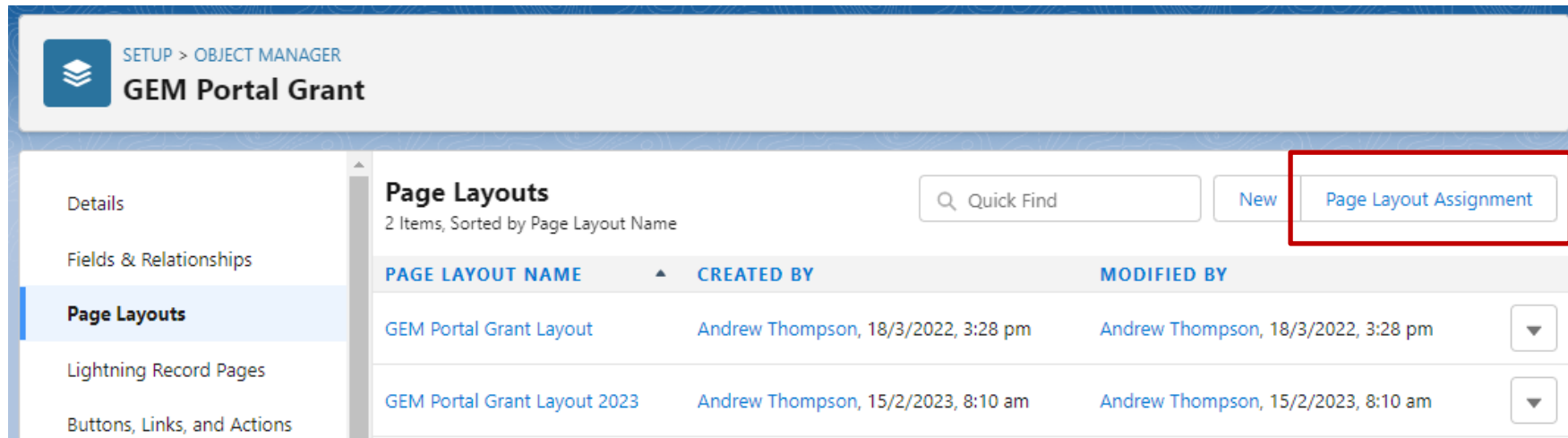


You will find the GEM Portal objects:

SETUP Object Manager				
102+ Items, Sorted by Label				
Event	Event	Standard Object		
GEM Portal Address	Strategic__GEM_Portal_Address__c	Custom Object	18/3/2022	✓
GEM Portal Grant	Strategic__GEMPortal_Grants__c	Custom Object	18/3/2022	✓
GEMP Contact	Strategic__GEMP_Contact__c	Custom Object	18/3/2022	✓

Under GEM Portal grant, Page Layouts will be the latest installed version (GEM Portal Grant Layout 2023).

If you have installed previous versions (e.g. such as GEM Portal Grant Layout) they will also be sitting in here. Only the latest version is required.



SETUP > OBJECT MANAGER  
**GEM Portal Grant**

Details  
Fields & Relationships  
**Page Layouts**  
Lightning Record Pages  
Buttons, Links, and Actions

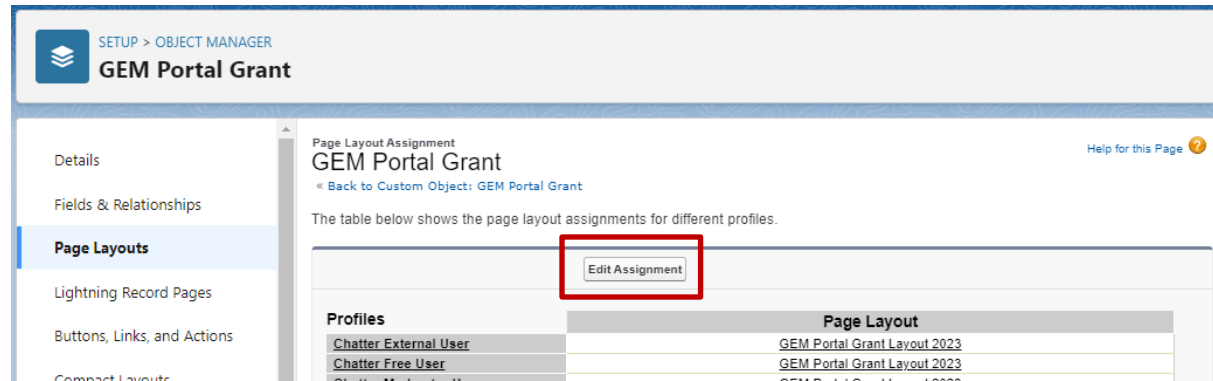
**Page Layouts**  
2 Items, Sorted by Page Layout Name

Quick Find New **Page Layout Assignment**

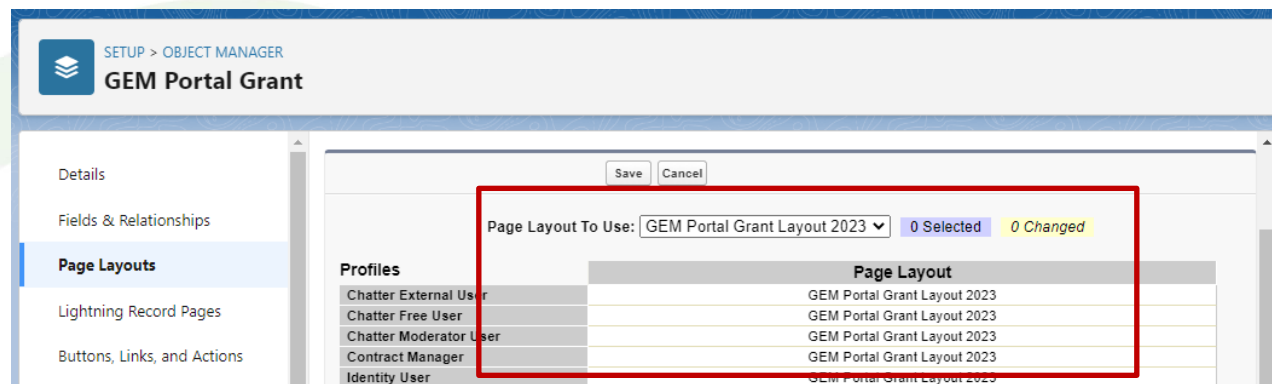
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
GEM Portal Grant Layout	Andrew Thompson, 18/3/2022, 3:28 pm	Andrew Thompson, 18/3/2022, 3:28 pm
GEM Portal Grant Layout 2023	Andrew Thompson, 15/2/2023, 8:10 am	Andrew Thompson, 15/2/2023, 8:10 am

Use the Page Layout Assignment button if you need to promote the latest version over an older version.

If you do need to promote the latest version over an older version, click the Edit Assignment button:



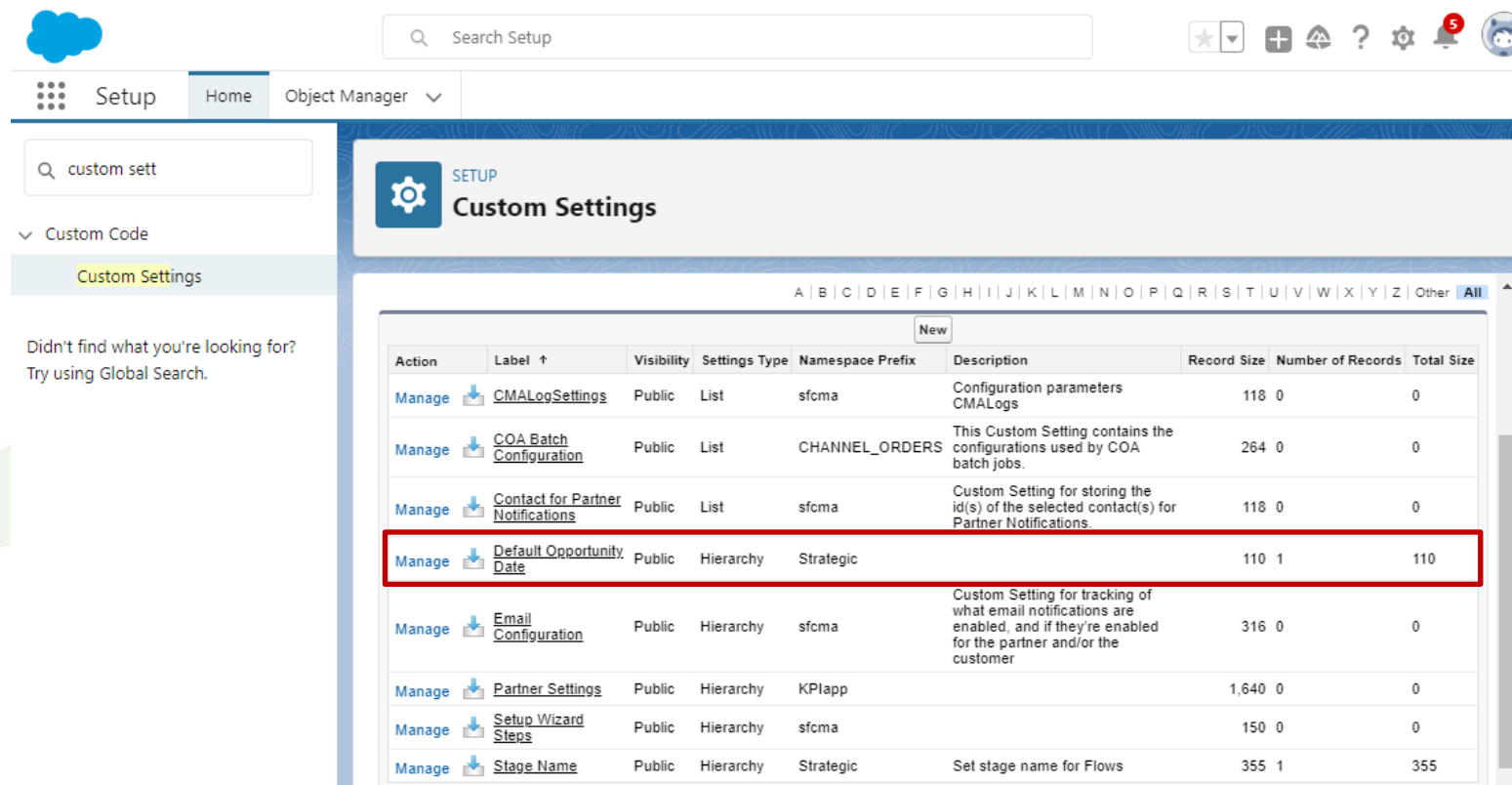
Then assign the Page Layout to Users as appropriate, for your sites business rules and implementation.



## Custom Settings

There is a custom setting that is added under the installation, that needs to have a value set:

### Default Opportunity Date

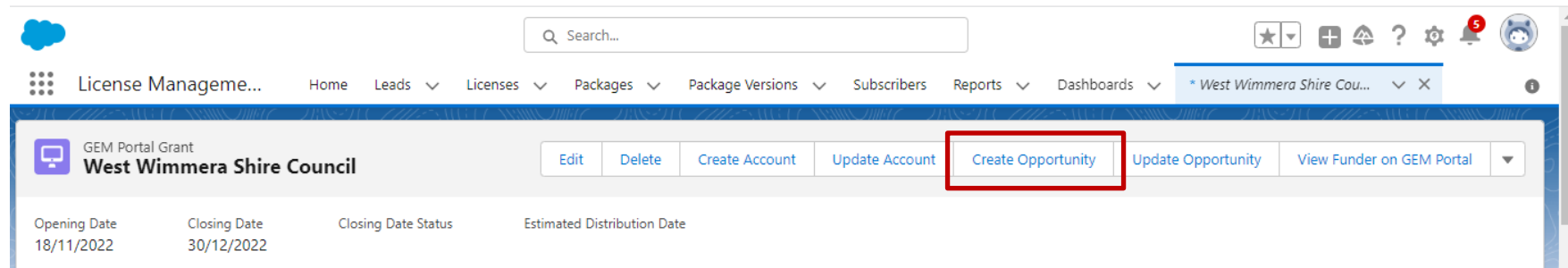


The screenshot shows the 'Setup' page with a search bar and navigation tabs. The 'Custom Settings' section is expanded, showing a list of settings. The 'Default Opportunity Date' setting is highlighted with a red box.

Action	Label ↑	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Manage	<a href="#">CMALogSettings</a>	Public	List	sfcma	Configuration parameters CMALogs	118	0	0
Manage	<a href="#">COA Batch Configuration</a>	Public	List	CHANNEL_ORDERS	This Custom Setting contains the configurations used by COA batch jobs.	264	0	0
Manage	<a href="#">Contact for Partner Notifications</a>	Public	List	sfcma	Custom Setting for storing the id(s) of the selected contact(s) for Partner Notifications.	118	0	0
Manage	<a href="#">Default Opportunity Date</a>	Public	Hierarchy	Strategic	Custom Setting for tracking of what email notifications are enabled, and if they're enabled for the partner and/or the customer	110	1	110
Manage	<a href="#">Email Configuration</a>	Public	Hierarchy	sfcma	Custom Setting for tracking of what email notifications are enabled, and if they're enabled for the partner and/or the customer	316	0	0
Manage	<a href="#">Partner Settings</a>	Public	Hierarchy	KPlapp		1,640	0	0
Manage	<a href="#">Setup Wizard Steps</a>	Public	Hierarchy	sfcma		150	0	0
Manage	<a href="#">Stage Name</a>	Public	Hierarchy	Strategic	Set stage name for Flows	355	1	355

Default Opportunity Date is used in one of the GEM Portal Salesforce Flows, that are also loaded with the installation.

It is used in the Create Opportunity Salesforce Flow, which is attached to the **Create Opportunity** button on the GEM Portal Grant screen:



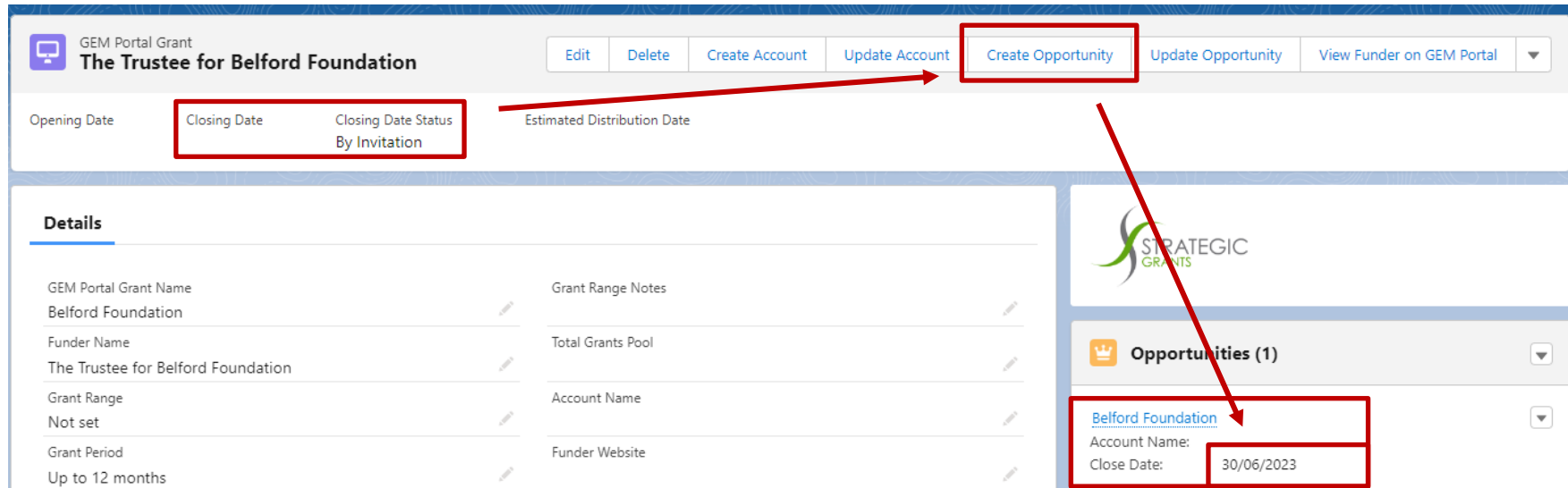
When the user clicks **Create Opportunity**, a Salesforce Flow is run, which creates a new Opportunity record in your Salesforce account, based off a selection of the Strategic Grants GEM Portal grants data.

### Default Opportunity Date

For Grants that do not have a set Closing Date, and because the Salesforce Opportunity must have a Closing Date, a default value is required to be set:



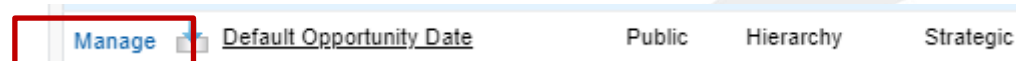
In this example, The Trustee for Belford Foundation is a “By Invitation” grant. As such it does not have a set Closing Date.




When the user clicks the **Create Opportunity** button, because there is no Closing date on the grant, it will reference **Default Opportunity Date** and use whatever date has been set by your organisation, for the new Opportunity Closing Date

### Setting the Default Opportunity Date

In Custom Settings, locate the Default Opportunity Date. Click **Manage**



Click Edit

 **SETUP**  
**Custom Settings**

Custom Setting

### Default Opportunity Date

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a set

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For exampl

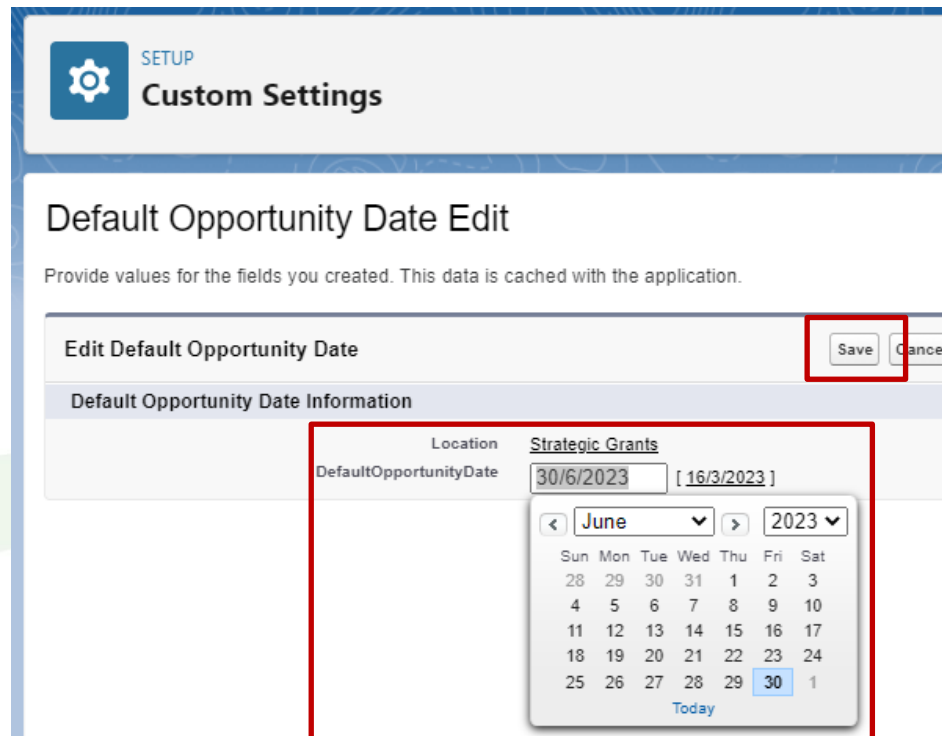
[Edit](#) [Delete](#)

▼ Default Organization Level Value

Location
<a href="#">Strategic Grants</a>

View: [All](#) [Create New View](#)

Set an appropriate date, based off your organisation business rules for By Invitation grant opportunities. Click Save.



**SETUP**  
**Custom Settings**

### Default Opportunity Date Edit

Provide values for the fields you created. This data is cached with the application.

**Edit Default Opportunity Date** Save Cancel

**Default Opportunity Date Information**

Location	DefaultOpportunityDate
Strategic Grants	30/6/2023 [ 16/3/2023 ]

Calendar view for June 2023:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1

Today

## GEM Portal steps

### **Advise your Strategic Grants Client Manager that you have purchased the Salesforce 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.

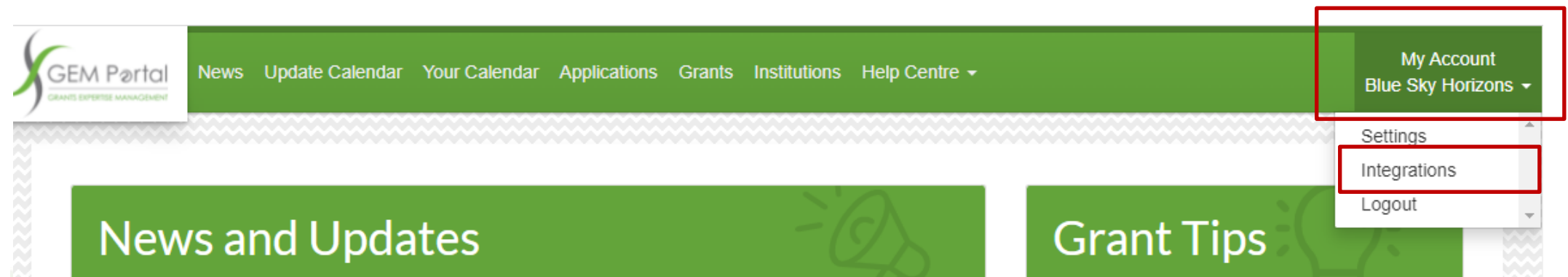
### **Log in to your Strategic Grants GEM Portal and connect the App within GEM Portal**

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.**

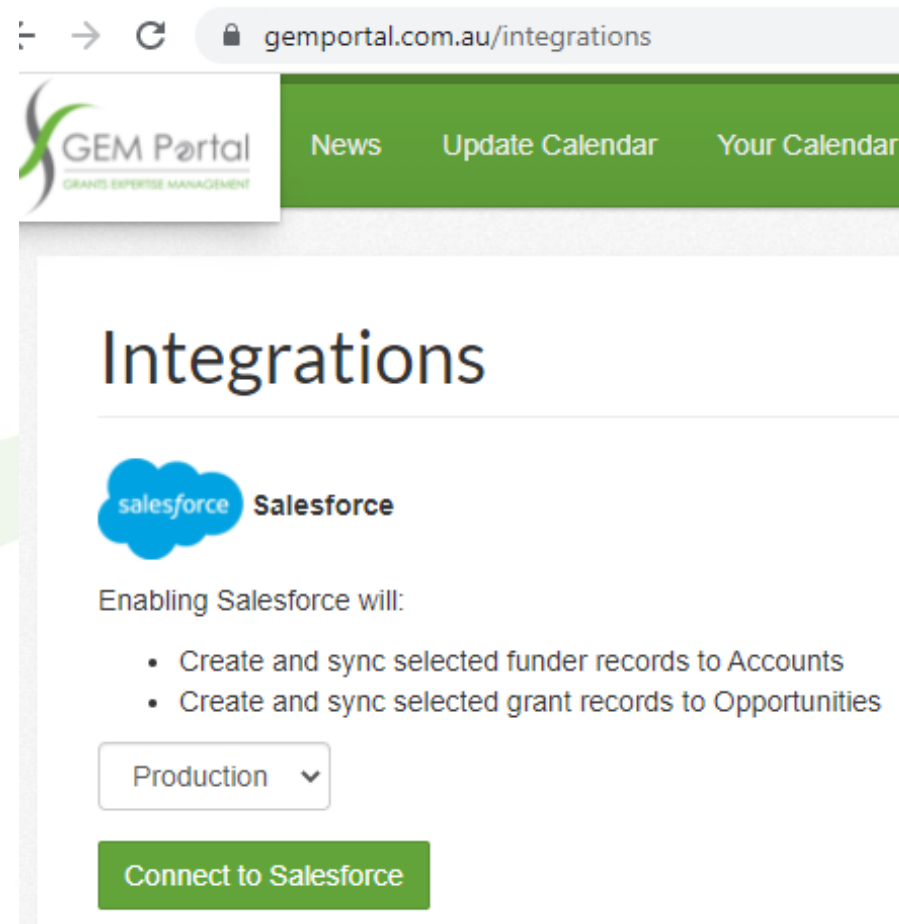
Within **GEM Portal**, click on **[your organisation's name] My Account** in top right hand corner of GEM Portal.

Select the option called **Integrations**:



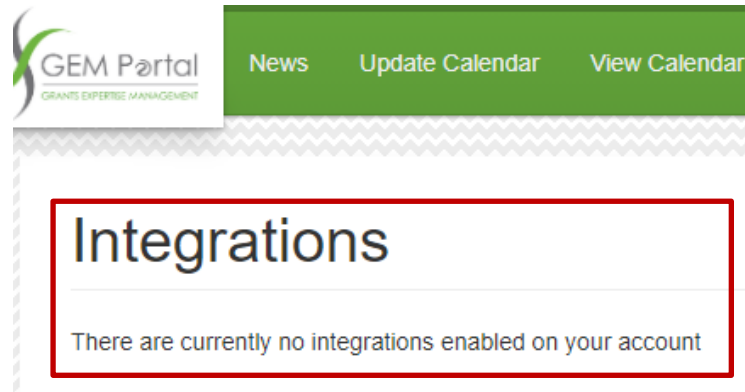
If your Strategic Grants Client Manager has enabled the integration, you will be presented with the following screen.

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



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

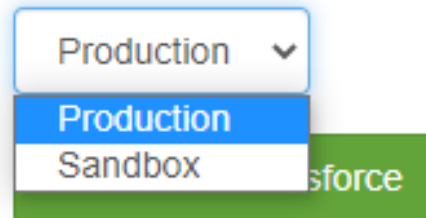
*“There are currently no integrations enabled on your account”*



**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 connector.



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

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

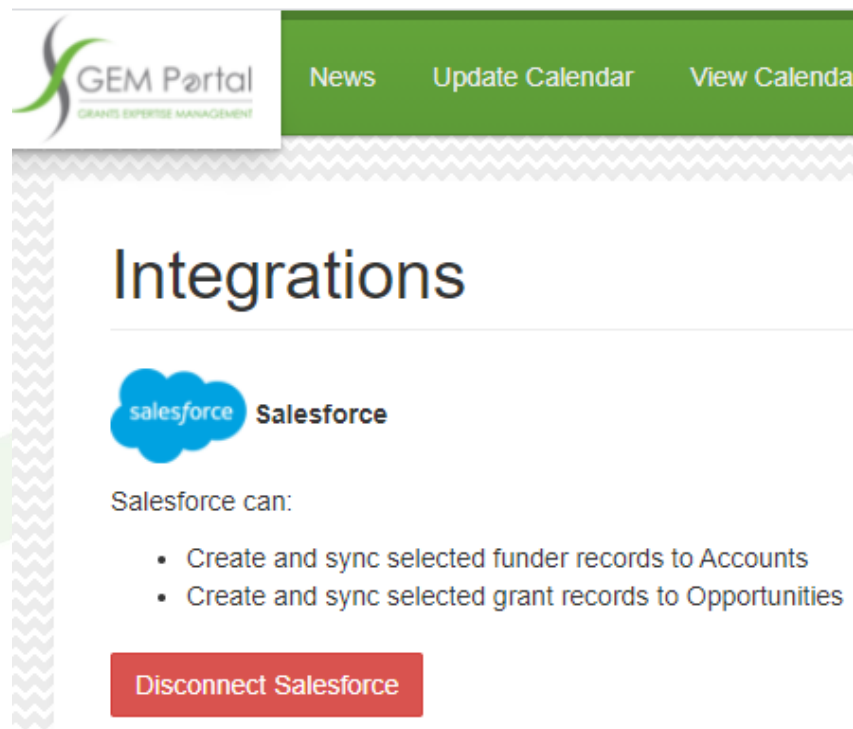




Once the authorisation process is complete, you will be returned to the **GEM Portal: Integrations** screen.

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

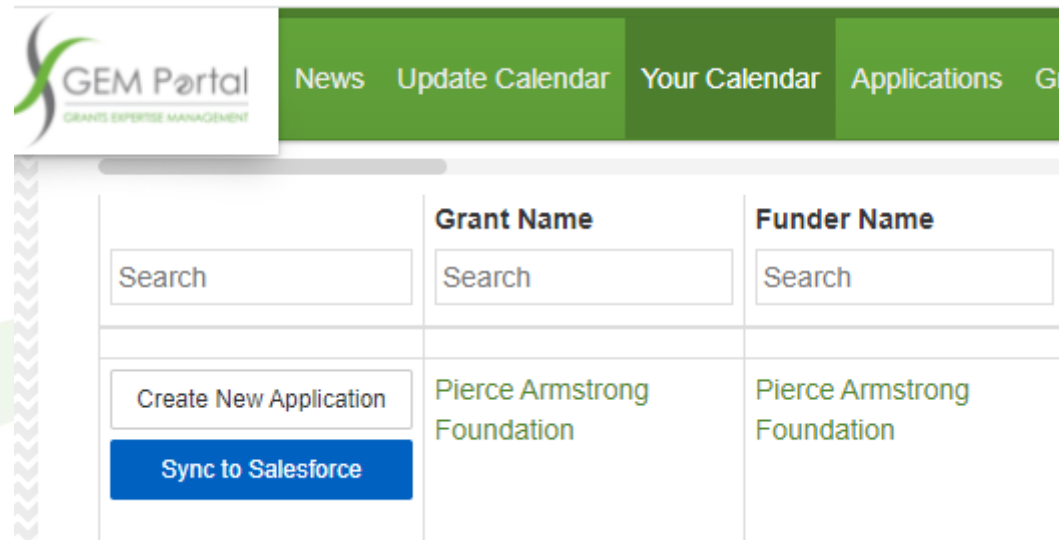
**(Don't click the big red button !)**



### 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**”



	Grant Name	Funder Name
Search	Search	Search
Create New Application	Pierce Armstrong Foundation	Pierce Armstrong Foundation
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.