

Managed Attendees in Salesforce

Rallybound offers 2 options how to integrate RSVP-only attendees into Salesforce:

1. Always push RSVP-only attendees as regular new contacts (with their own account if using one-to-one or household models).
2. Only push RSVP-only attendees to an existing household in this option we offer 2 options:
 - Add ALL RSVP-only attendees to their existing manager's Household.
 - Add only those RSVP-only attendees if they match their existing manager's last name.
- If an existing household was not found:
 - If option one was selected "Always push RSVP-only attendees as regular new contacts", then Salesforce will create a new contact for this RSVP-only attendee with their own account.
 - If option one was not selected then it will not insert the RSVP-only attendee into Salesforce.

Requirements:

For option 2 the client must be using NPSP Household Account Model.