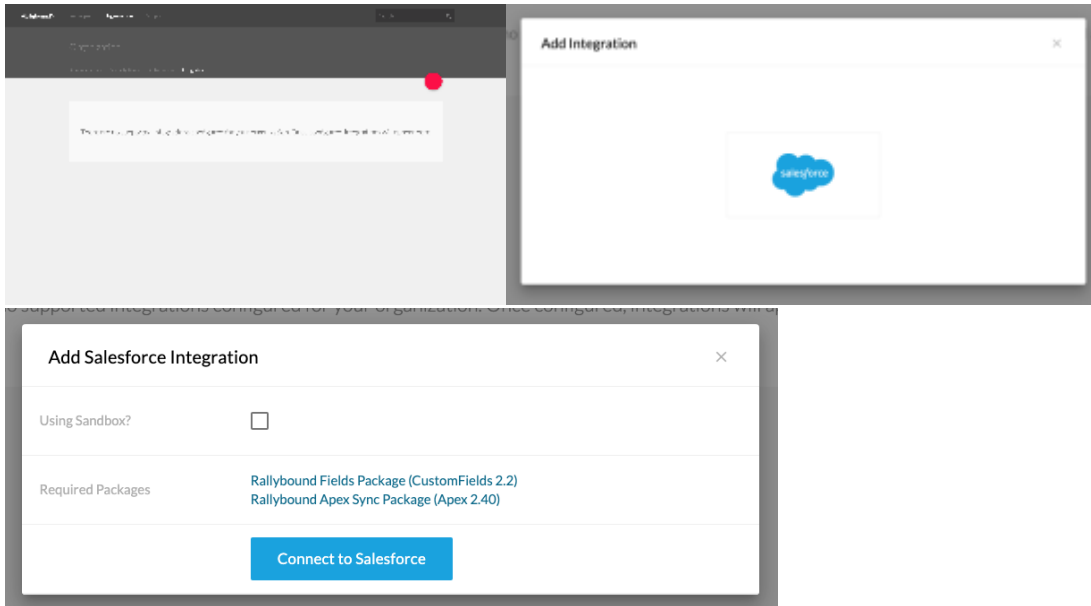


How to connect Rallybound to Salesforce

Please follow the below steps to connect your Rallybound instance to your Salesforce org. The Rallybound Salesforce app allows fundraising data to be pushed to your database automatically.

1. Log into the Admin at admin.rallybound.com
2. Navigate to Organization (top level) > Integrations
3. Click the plus button
4. Click Salesforce
5. Install the required Rallybound Salesforce packages
6. Click "Connect to Salesforce" and log into your Salesforce account.

Note: Many organizations have a dedicated Salesforce user used for integration purposes. If you'd like to use a particular Salesforce user for the Rallybound integration, be sure to log out from Salesforce before clicking the "Connect to Salesforce" button.





Once you've connected Salesforce on the organization level, it's time to apply that connection to a campaign. To do so, follow these steps:

1. Navigate to the campaign on which to configure your Salesforce connection
2. Click the "System" tab
3. Click "Integrations"
4. Check the Salesforce checkbox
5. Select the active account to apply to the campaign, then continue to configure your Salesforce sync settings. Please see [here](#) for our full Salesforce guide.

Reconnecting to Salesforce


In the event that your Salesforce token expires, click the reconnect button on the affected Salesforce integration card and log into your Salesforce account. (Also see note on item 6 above.)

Once you've reconnected Salesforce, all campaigns that were connected to the original Salesforce account will be updated to use the new connection.




Salesforce
00D3t000002pYAhEAL -
admin@salesforce.com

TOKEN FAILED



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INFORMATION CAMPAIGNS

Instance URL	https://123abc.salesforce.com
Username	admin@salesforce.com
Using Sandbox	<input type="checkbox"/>
Required Packages	Rallybound Fields Package (CustomFields 2.2) Rallybound Apex Sync Package (Apex 2.40)

[Reconnect to Salesforce](#)