



# FLUXX



# Fluxx + Salesforce Integration

## Real-time data sync for smarter collaboration

Grantmakers rely on both Fluxx and Salesforce to manage grantees, programs, and partners. When these systems work together, teams save time, improve data quality, and make more informed decisions. The Fluxx integration with Salesforce automatically syncs people, organizations, and grant records across platforms. That means no more toggling between systems or worrying about data discrepancies.

### COMMON USE CASES

**Program Officers:** Push meeting notes from Salesforce into Fluxx to inform grant reviews

**Grants Teams:** View grant status and award details directly within Salesforce

**Executives:** Analyze grant data alongside donor CRM insights using Salesforce reports

### KEY BENEFITS

#### Work in Your System

**of Choice:** Access grant data in Salesforce or relationship history in Fluxx—no switching required

#### Automate Manual

**Work:** Sync records every 5 minutes to eliminate duplicate entry and reduce errors

#### Break Down Team

**Silos:** Keep Programs, Grants, and Leadership aligned with shared information across platforms

#### Adapt to Your Data

**Model:** Sync both standard and custom fields to reflect your organization's unique structure



# What Syncs Between Fluxx and Salesforce

| ENTITY        | FLUXX RECORD | SALESFORCE OBJECT              | SYNC TYPE                     | WHY IT MATTERS   |
|---------------|--------------|--------------------------------|-------------------------------|--|
| PEOPLE        | User         | Contact                        | Bidirectional                 | Keep contact records (e.g., grantees, staff) consistent across systems       |
| ORGANIZATIONS | Organization | Account                        | Bidirectional                 | Align organization-level data (address, tax ID, phone) for smooth operations |
| GRANTS        | Grant        | Opportunity (or custom object) | Fluxx → Salesforce            | Push grant details into Salesforce to support CRM reporting and fundraising  |
| ACCOUNTS      | -            | Account                        | Salesforce → Fluxx            | Create new organizations in Fluxx when accounts are added in Salesforce      |
| CONTACTS      | -            | Contact                        | Salesforce → Fluxx            | Create/update Fluxx users when contacts are added or edited in Salesforce    |
| CUSTOM FIELDS | Any model    | Any mapped object              | Configurable (1-way or 2-way) | Include custom fields such as program area, grant type, or internal owner    |

## HOW THE INTEGRATION WORKS

- **Source of Truth:** You determine which system owns each record type
- **Frequency:** Syncs occur every 5 minutes by default
- **Error Handling:** Issues are logged in Fluxx and optionally emailed to admins
- **Custom Field Mapping:** Sync both standard and custom fields with matching logic

