

Uploading Contacts to Salesforce

Last Modified on 28/05/2024 10:26 am ACST

Similar to [Uploading data to 3rd party systems \(csv export\)](#) , CareRight published new Contact or Patient records to Salesforce, when configured.

This allows at the first point of contact, provided marketing consent is indicated, for new records to be mirrored to a CRM for non-clinical purposes.

Setup - Salesforce

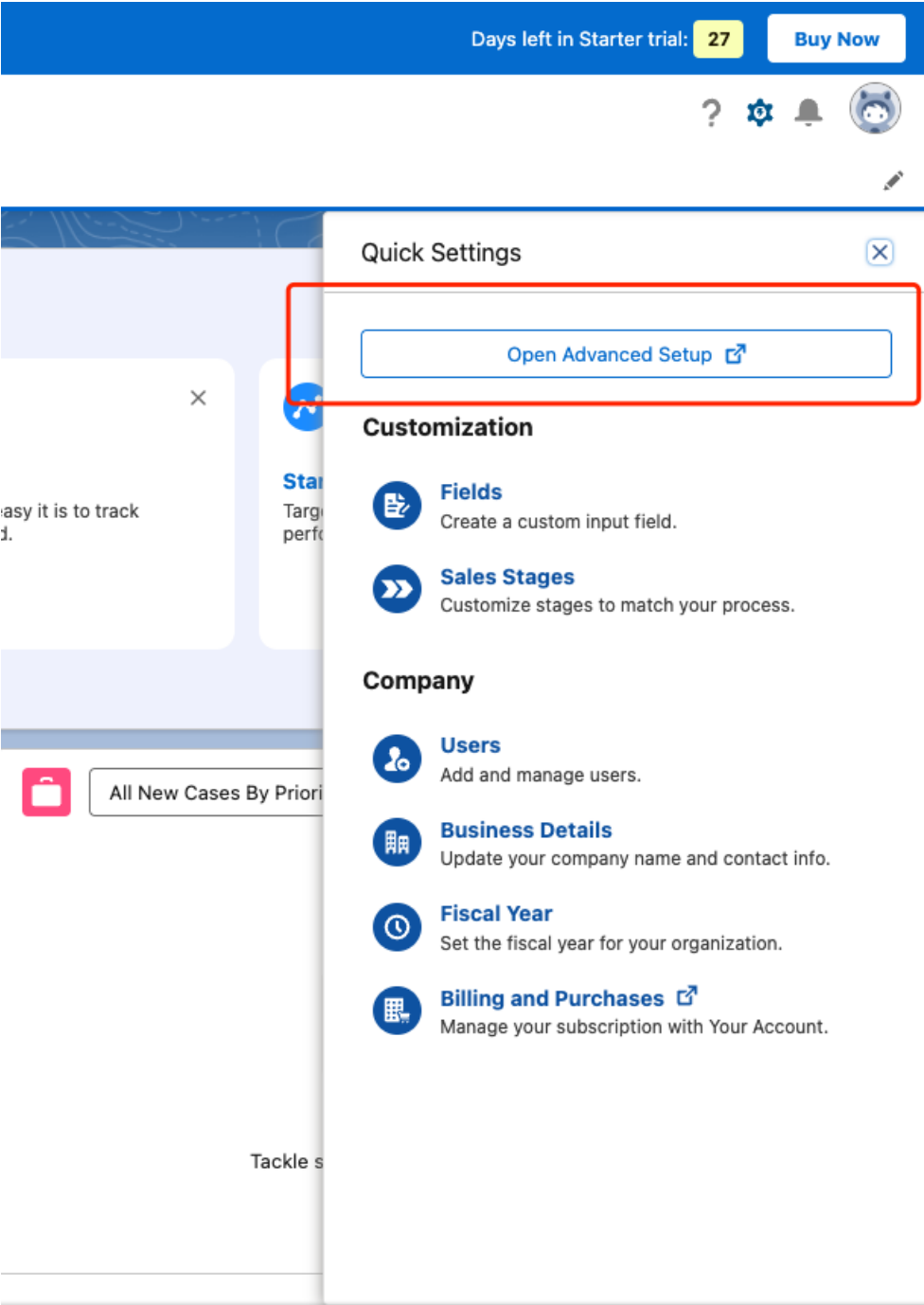
Quick tutorial video: locate and use the app manager

Step by Step

□

Login you the Salesforce and you will be in the homepage, e.g. <https://ability-page-7645.lightning.force.com/lightning/page/home>

Click the setting icon button on the right side and choose the "Open Advanced Setup"



□

In Setup menu, choose **Apps** -> **App manager**, then click **New connected Apps**

Days left in Starter trial: **27** [Buy Now](#)

Setup Home Object Manager

Quick Find

Setup Home

- Multi-Factor Authentication Assistant
- Hyperforce Assistant
- Release Updates
- Salesforce Mobile App
- Optimizer
- Manage Subscription
- Sales Cloud Everywhere
- ADMINISTRATION
- > Users
- > Data
- > Email
- PLATFORM TOOLS
- > Apps
 - App Manager**
 - AppExchange Marketplace
 - > Connected Apps
 - > Mobile Apps
 - > Packaging
 - > Feature Settings
 - > Einstein
 - > Unified Messaging

Lightning Experience App Manager

18 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name	Developer Name	Description	Last Modified	App Type	Visible
1 Accounts	EasyAccounts	Store information about the companies you do business with	2/5/2024, 4:06 am	Lightning	✓
2 All Tabs	AllTabSet		2/5/2024, 4:06 am	Classic	
3 App Launcher	AppLauncher	App Launcher tabs	2/5/2024, 4:06 am	Classic	
4 Commerce	CommerceStarter		2/5/2024, 4:06 am	Lightning	✓
5 Contacts	EasyContacts	Store contact information and details about the people you do business with	2/5/2024, 4:06 am	Lightning	✓
6 Content	Content	Salesforce CRM Content	2/5/2024, 4:09 am	Classic	
7 Home	EasyHome	For Starter orgs, review your day with dashboards and productive tools	2/5/2024, 4:06 am	Lightning	✓
8 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	2/5/2024, 4:06 am	Classic	
9 Outreach	EasyOutreach	For Starter orgs, send templated emails to lists of prospective customers	2/5/2024, 2:10 pm	Lightning	✓
10 Platform	Platform	The fundamental Lightning Platform	2/5/2024, 4:06 am	Classic	
11 Sales	Sales	The world's most popular sales force automation (SFA) solution	2/5/2024, 4:06 am	Classic	
12 Sales	EasySales	For Starter orgs, manage your sales process with accounts, leads, opportunities, and more	2/5/2024, 4:06 am	Lightning	✓
13 Service	Service	Manage customer service with accounts, contacts, cases, and more	2/5/2024, 4:06 am	Classic	
14 Service	EasyService	For Starter orgs, manage customer service with accounts, contacts, cases, and more	2/5/2024, 4:06 am	Lightning	✓
15 SfdcSicActivityPlatform	SfdcSicActivityPlatform	W-7656257	2/5/2024, 4:31 pm	Connected	
16 SfdcSicCloudActivity	SfdcSicCloudActivity	Activity Metrics	2/5/2024, 2:17 pm	Connected	
17 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content and published sites.	2/5/2024, 4:06 am	Classic	
18 test_api	test_api		3/5/2024, 1:47 pm	Connected	

Input some Basic Information and tick the **Enable OAuth Settings** checkbox.

New Connected App [Help for this Page](#)

[Save](#) [Cancel](#)

To publish an app, you need to be using a Developer Edition organization with a namespace prefix chosen.

Basic Information

Connected App Name

API Name

Contact Email

Contact Phone

Logo Image URL [Upload logo image](#) or [Choose one of our sample logos](#)

Icon URL [Choose one of our sample logos](#)

Info URL

Description

API (Enable OAuth Settings)

[Enable OAuth Settings](#) ☐

Web App Settings

Start URL

Enable SAML ☐

Custom Connected App Handler

Apex Plugin Class

Make sure the settings in **following screenshot are the same** and **save the app**.

API (Enable OAuth Settings)

☒ Enable OAuth Settings

☒ Enable for Device Flow

Callback URL

☐ Use digital signatures

Selected OAuth Scopes

Available OAuth Scopes

- Manage Data Cloud Calculated Insight data (cdp_calculated_insight_api)
- Manage Data Cloud Identity Resolution (cdp_identityresolution_api)
- Manage Data Cloud Ingestion API data (cdp_ingest_api)
- Manage Data Cloud profile data (cdp_profile_api)
- Manage Pardot services (pardot_api)
- Manage user data via APIs (api)
- Manage user data via Web browsers (web)
- Perform ANSI SQL queries on Data Cloud data (cdp_query_api)
- Perform requests at any time (refresh, token, offline_access)
- Perform segmentation on Data Cloud data (cdp_segment_api)

Selected OAuth Scopes

- Full access (full)

☒ Require Proof Key for Code Exchange (PKCE)

☒ Require Secret for Web Server Flow

☒ Require Secret for Refresh Token Flow

☒ Enable Client Credentials Flow

☒ Enable Authorization Code and Credentials Flow

☐ Require user credentials in the POST body for Authorization Code and Credentials Flow

☐ Enable Token Exchange Flow

☐ Enable Refresh Token Rotation

Go to Setup menu, and choose **Apps -> Connected Apps -> Manage Connected Apps**, then click edit of your connected app

Go to **Client Credentials Flow** section, click the search icon button

Version 1
Description

Basic Information

Start URL Mobile Start URL

OAuth Policies

Permitted Users

Enable Single Logout ☐

IP Relaxation

Refresh Token Policy: ☒ Immediately expire refresh token

Session Policies

Timeout Value

☐ High assurance session required

Custom Connected App Handler

Apex Plugin Class

Run As

User Provisioning Settings

☐ Enable User Provisioning

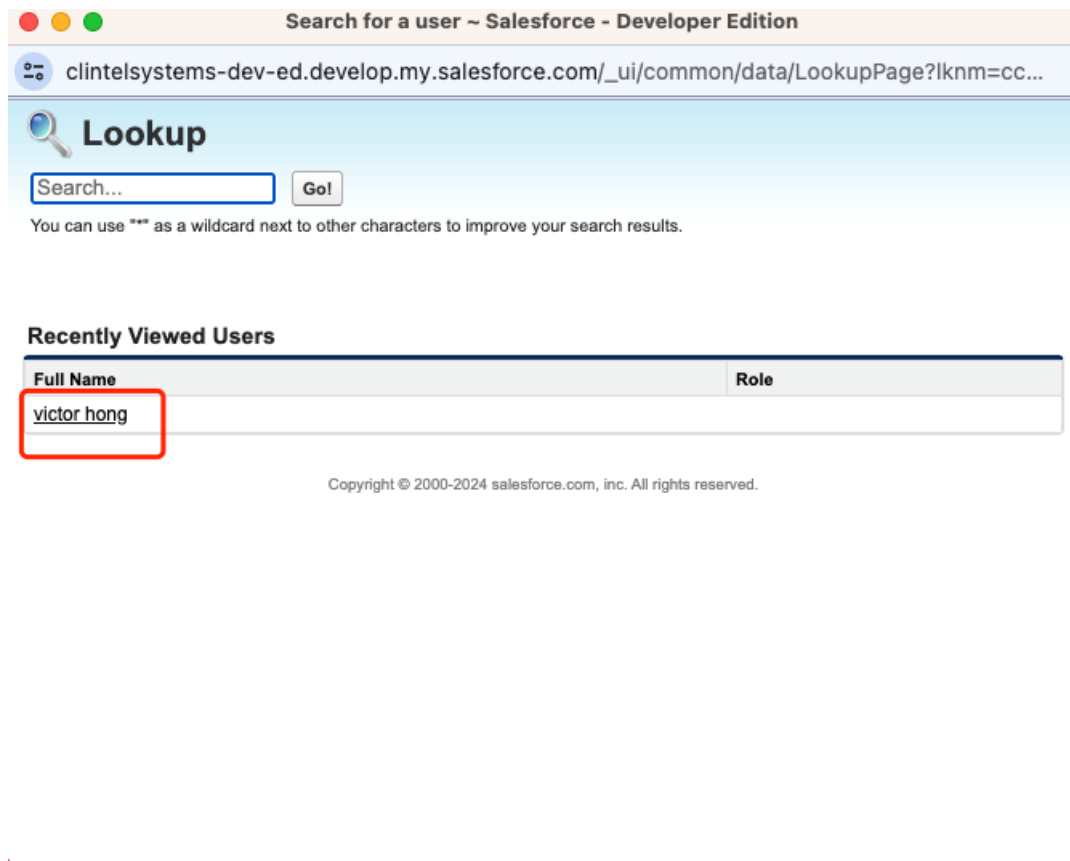
Client Credentials Flow

Run As

Save Cancel

Choose a user as **API connection user**, then save the setting.

We recommend creating easily recognisable application specific user accounts, such as *CareRight Test* or *CareRight Production*.



Setup - CareRight

Main article: [Data Producers & Data Retrievers](#)

Follow the standard process for creating a data producer, under **Admin > Workflow > Data Producers**.

Ensure that:

- You choose an appropriate name
- You select **Patient Demographics**
- You set a client type of **Salesforce**
- You add the **Consumer Key** from your salesforce application as **Client ID**
- You add the **Consumer Secret** from your salesforce application as **Client Secret**
- You set the **Authentication URL** to your environment's url, with the suffix of **/services/oauth2/token**

Example settings:

Data producer

Name
salesforce

Producer *
Patient Demographics

Message Type *
JSON

☒ Enabled

Destination Host *
https://clintelsystems-dev-ed.develop.my.salesforce.com/

Destination Port *
443

Client Type
Salesforce

Credentials

Only applicable for JSON or OAuth2 endpoints

Client ID
Add "Consumer Key" here

Client Secret
Add "Consumer Secret" here

Authentication Url
https://clintelsystems-dev-ed.develop.my.salesforce.com/services/oauth2/token

Api Endpoint Url

Custom fields

If you wish to map to a Salesforce field , add a [Custom Patient Field](#). For example; to populate **Contact Type** in Salesforce, create a custom person field.

Set

- **External Platform Name** - this should be **Salesforce**
- **External Platform Attribute Name** - this should be the Salesforce identifier for the field.

Person Detail

Section
Identity

Name
c_salesforce_type

Value Type
String

Label
Salesforce Contact Type

Position
2

☒ Enabled for External Platform

External Platform Name
Salesforce

External Platform attribute name
Type__c

☒ Enabled

Update Person detail setup
Cancel

At this time, only strings are supported.

Adding a custom person field may require a restart of CareRight and background processing. Contact Clintel technical support for assistance.

Publishing records

Following any of the standard [Add a New Patient](#) workflows, a record is published.

At this time, only very minimal data is published (Given name, Family name, Email, Email Marketing Consent); and any Custom Person Fields you have explicitly specified.

Mr Bob Example

MRN: 000056 CRN: 000029 Home: 123 Mailing Road, ADELAIDE SA 5008
Male , aged 35 minutes , born on May 28, 2024

daniel@clintelsystems.com

Edit

Print Label

New Appointment

Manage

Search patient record...

Dashboard / Clients / Mr Bob Example

Patient was successfully updated.

This is the patient summary view. Would you like to see a different view when you select a patient?

I want to see a different view

Don't show this message again

Identity

Facility	GFA
MRN	000056
CRN	000029
Title	Mr
Family Name	Example
Middle Name	
Given Name	Bob
First Name Alias	
Last Name Alias	
Date of Birth	28/05/2024
Date of Birth Accuracy	
Sex	Male
Gender Diversity	
Primary Provider	
Marital Status	
Deceased	No
Date Of Death	
Individual Healthcare Identifier (IHI)	

Search...

Nonprofit Success ...

Accounts

Contacts

Opportunities

Recurring Donations

Campaigns

Reports

Dashboards

NPSP Settings

Contact

Bob Example

Account Name

Example (Bob) Household

Email

bob@example.com

Phone

Related List Quick Links

Relationships (0)

Organization Affiliations (0)

Engagement Plans (0)

Opportunities (0)

Recurring Donations (0)

Campaign History (0)

Notes (0)

Files (0)

Contact History (2)

Contacts (0)

Details

Related

Volunteer

Clinician

▼ Contact Details

Name

Bob Example

Account Name ⓘ

Example (Bob) Household

Primary Affiliation ⓘ

Title

Do Not Contact ⓘ

Languages

Requested Video on USB?

Organisation

Type

Gidget House Patient

Interested In

Lead Source

Deceased ⓘ

Activities

May 28 10:07