Uploading Contacts to Salesforce

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.
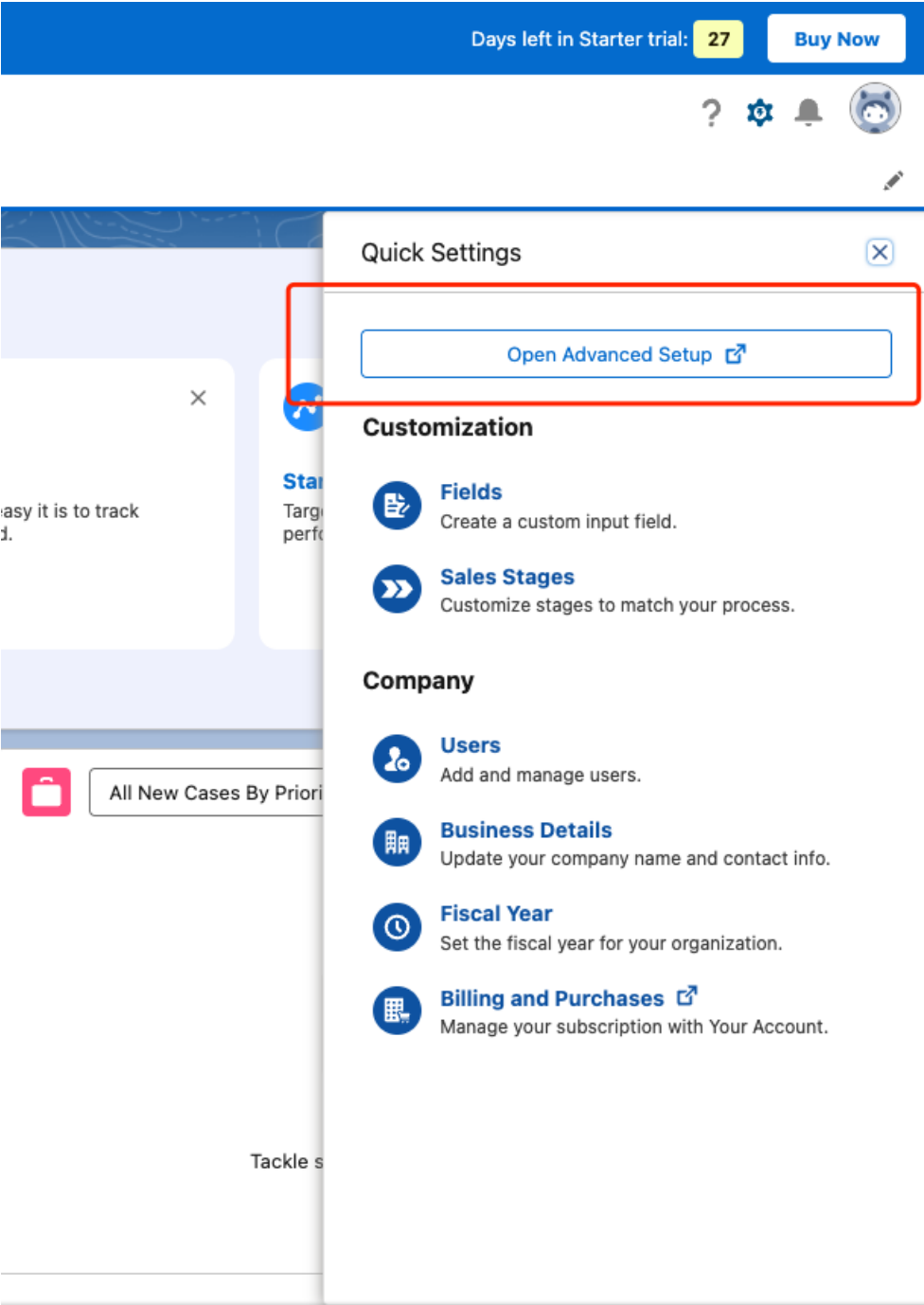
Setup - Salesforce

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**

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

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

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

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.*
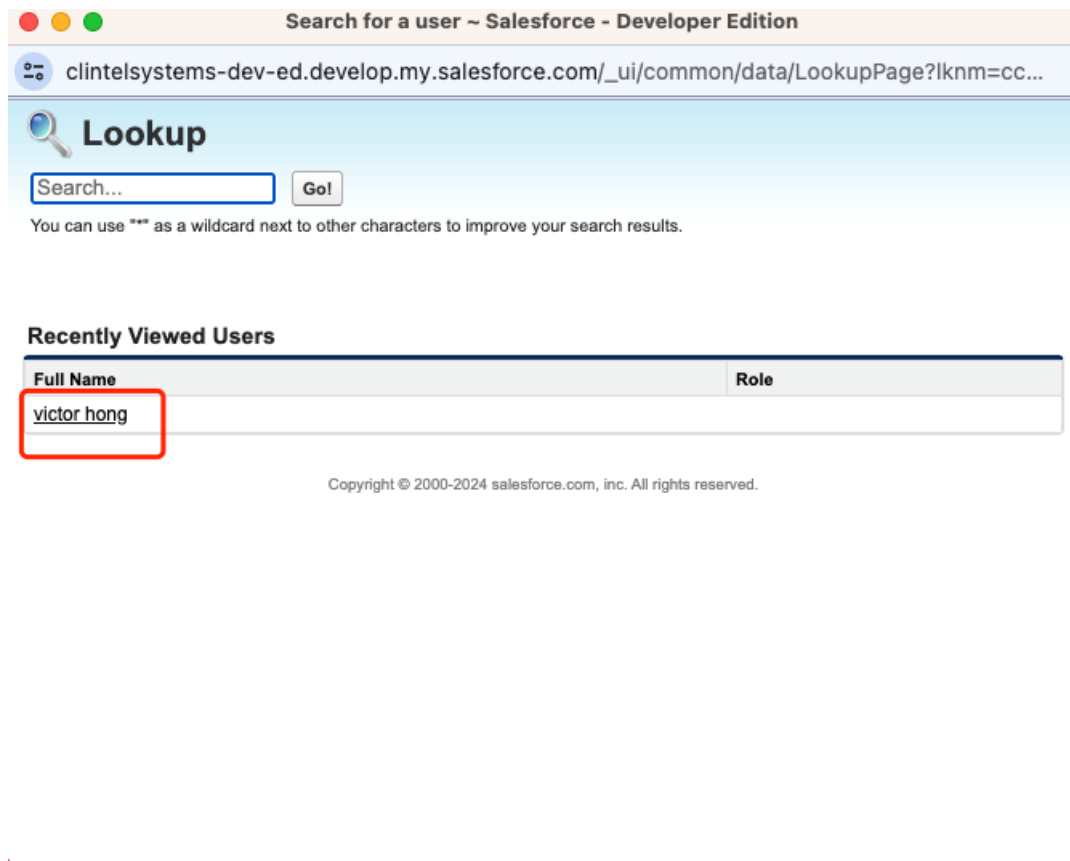
Setup - CareRight

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 Platfrom
External Platfrom Name	Salesforce ✕ ▾
External Platfrom 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

Dashboard / Clients / Mr Bob Example

Search patient record...

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 | Email | Phone
Example (Bob) Household | bob@example.com |

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 🔔

Unsaved Image 1* - Pints