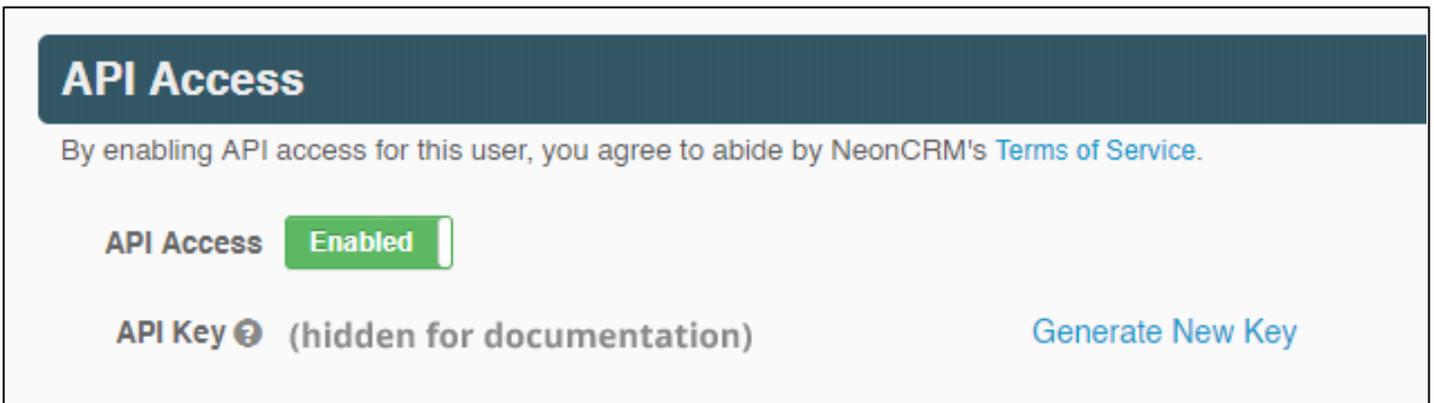


NeonCRM & VolunteerLocal: Integration & Synchronization Documentation

Step 1: Establish a connection/integration between NeonCRM and VolunteerLocal

A. Copy your API Key from NeonCRM

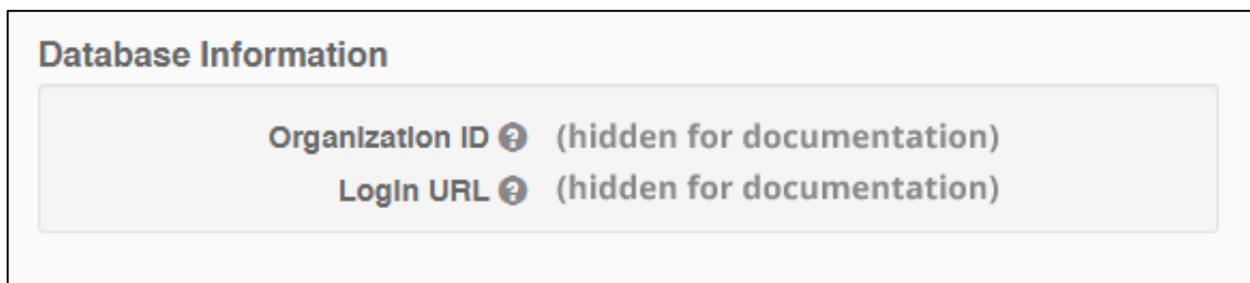
1. Log into NeonCRM and go to Settings->User Management
2. Click "Edit" next to the user to use for authentication/access.
3. Scroll to "API Access" and click the toggle to "Enable" API Access for this user.
4. Copy the API Key for later use.



The screenshot shows the "API Access" settings for a user. At the top, there is a dark blue header with the text "API Access". Below the header, a message states: "By enabling API access for this user, you agree to abide by NeonCRM's [Terms of Service](#)." Underneath, there is a toggle switch labeled "API Access" which is currently set to "Enabled" (indicated by a green bar). Below the toggle, the text "API Key" is followed by a question mark icon and "(hidden for documentation)". To the right of this text is a blue button labeled "Generate New Key".

B. Copy your Organization ID from NeonCRM

1. Log into NeonCRM and go to Settings->Organization Profile
2. Scroll to "Database Information" (under "Account Information") to find your Organization ID.
3. Copy the Organization ID for later use.



The screenshot shows the "Database Information" settings. The title "Database Information" is at the top. Below it, there is a light gray box containing two lines of text: "Organization ID" followed by a question mark icon and "(hidden for documentation)", and "LogIn URL" followed by a question mark icon and "(hidden for documentation)".

C. Save the API Key and Organization ID in VolunteerLocal

1. In VolunteerLocal, go to Account->Settings and scroll to "Integrations -> NeonCRM"
2. Paste your API Key and Organization ID into the corresponding fields and click the Save button.

NEON CRM: Your NEON CRM API access is not active.

API Key:

Organization ID:

Step 2: Create the Custom Object which will hold volunteer data

A. Create a new NeonCRM Custom Object from within VolunteerLocal

1. In VolunteerLocal, go to Account->Settings and scroll to "Integrations -> NeonCRM"

Note: This step assumes the API Key and Organization ID saved in Step 1 created a successful connection between NeonCRM and VolunteerLocal.

2. Click the link labeled [Create new Custom Object]

3. In the new area, enter a name for the Custom Object that describes the data you will synchronize.

4. Click the button labeled "Create Custom Object"

Use these settings to establish a Custom Object and mapped fields for volunteer hours.

1. Select the Custom Object to sync to: [refresh] [Create new Custom Object]

Enter a Custom Object name to be created in your NeonCRM.

Object name:

If you are unsure what to put here, type "Volunteer Hours Tracking"

5. When the Custom Object has been saved, the screen will look similar to this:

Use these settings to establish a Custom Object and mapped fields for volunteer hours.

1. Select the Custom Object to sync to: [refresh] [Create new Custom Object]

2. Match the VolunteerLocal field with the proper field in your NeonCRM system

Event name:	<input event_name_c")"="" type="text" value="Event name ("/>
Job name:	<input job_c")"="" type="text" value="Job ("/>
Shift start date/time:	<input shift_start_c")"="" type="text" value="Shift start ("/>
Hours worked (by shift time):	<input hours_c")"="" type="text" value="Hours ("/>
Hours worked (by check-in time):	<input checkin_hours_c")"="" type="text" value="Checkin Hours ("/>

Step 3: Select/map the fields to synchronize

A. Use the dropdown to select the NeonCRM field (on the right) to synchronize with the corresponding VolunteerLocal field (on the left).

1. When the fields have been selected, click the Save button.

Notes:

- When a Custom Object is created, VolunteerLocal automatically creates the following fields on the Custom Object: Event name, Job, Shift start, Hours, Checkin Hours.

- The fields will appear in the dropdown, aligned with the proper VolunteerLocal field.

- At the time of this release, VolunteerLocal can synchronize the following VolunteerLocal data to NeonCRM: event name, job name, shift start date/time, hours worked (by shift time), hours worked (by check-in time).

2. Match the VolunteerLocal field with the proper field in your NeonCRM system

Event name:

Event name ("Event_name_c") ▼

Job name:

Job ("Job_c") ▼

Shift start date/time:

Shift start ("Shift_start_c") ▼

Hours worked (by shift time):

Hours ("Hours_c") ▼

Hours worked (by check-in time):

Checkin Hours ("Checkin_Hours_c") ▼

Save NeonCRM Field Mapping

Step 4: Synchronize data within VolunteerLocal

Notes:

- VolunteerLocal uses a contact's email address to search for a matching record on NeonCRM. If multiple entries are returned, VolunteerLocal attempts to find an email + first name match

- If no match is found, VolunteerLocal will create an Individual Account in NeonCRM; at the time of this document release, the Individual Account will be created with a first name, last name and email address.

- VolunteerLocal stores a unique key ("VL key") in NeonCRM for each record synchronized to NeonCRM. This unique key is used to update records that already exist, thereby eliminating the potential for duplicates. Never edit the unique key.

A. Method 1: Synchronize an entire event.

1. Go to Volunteers->Report and select an event
2. Click the "Sync Hours with Neon CRM" button to synchronize data, from all volunteers in the event, to NeonCRM.

Volunteer Job & Shift Summary

Select an event. View volunteer detail by expanding jobs and shifts.

Your Event ▼ (page break after:)

Job #1	200/250 filled	80%	...
Job #2	200/250 filled	80%	...

B. Method 2: Synchronize a single volunteer profile.

1. Go to Volunteers->Report and select an event
2. Click the "Sync Hours with Neon CRM" button to synchronize data, from all volunteers in the event, to NeonCRM.

Update information for (email)

Email address:

SMS verified: XXX-XXX-XXXX

* First Name

* Last Name

Mobile Phone

T-shirt size

Birthdate 

File upload
[View/download \(certificate.doc\)](#)

Accepted disclaimer/waiver: (signed)

Copy or move this volunteer to new job/shift.
 [copy] [move]

Send a message directly to this volunteer.

Shift detail
Job #1: 10/20/2029 9:00AM-10:30AM
Signed up: 08/23/2029 9:05AM
Check-in/out: -

Volunteer Links
[Profile Page](#)
[Certificate PDF](#)
[Badge PDF](#)
[Download/view Waiver \(PDF\)](#)

Step 5: Enable NeonCRM users to view the list layout of synchronized records

A. Add a System Related List in NeonCRM

1. Log into NeonCRM and go to Settings->Global Settings->Custom Objects
2. Click the Object Title (name) of the Custom Object to make edits.
3. At top right of the screen, click the Active/Inactive toggle so it says "Inactive".
4. Scroll to the section labeled "Custom Fields & Relationships"
5. Click the link to edit the "Account" field.
6. Scroll to "Add System Related Lists"
7. Click the On/Off toggle under the "Add System Related Lists" so it says "On".
8. Enter a Section Title in the space provided.
Note: this value will be what is shown in the left-hand menu when looking at an Account.
9. Scroll to the top of the page and click the Save button on the right.
10. Click the "Back" button, which is next to the Save button you just clicked.
11. At top right of the screen, click the Active/Inactive toggle so it says "Active".