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NeonCRM & VolunteerLocal: Integration & Synchronization Documentation

Dear NeonCRM and VolunteerLocal customer,

We are pleased to share with you this documentation to assist you in integrating your NeonCRM and VolunteerLocal accounts. If at any time you have questions about the integration, you can contact our support team at support@volunteerlocal.com. We encourage initial integration and API support to start with email so we can assign the right resource.

This integration was developed to help nonprofit organizations like yours more effectively measure donor advocacy by tracking both their time and monetary contributions. Our volunteer management software serves as a satellite solution that feeds this critically important data to your primary CRM, allowing you to track everything under one system.

The integration between NeonCRM and VolunteerLocal was launched in 2019 and will continue to evolve over time. At the time of this writing, the integration is designed to get volunteer hours out of VolunteerLocal and into NeonCRM. It is important to note the integration will create Individual Accounts within NeonCRM if VolunteerLocal is unable to find the volunteer in NeonCRM. We look for matches based on email address and first name.

We have plans to broaden the integration between NeonCRM and VolunteerLocal and welcome your feedback on how the integration can better serve you. You can send your ideas and suggestions to hello@volunteerlocal.com.

Thank you-

Kaylee Williams
President, VolunteerLocal

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

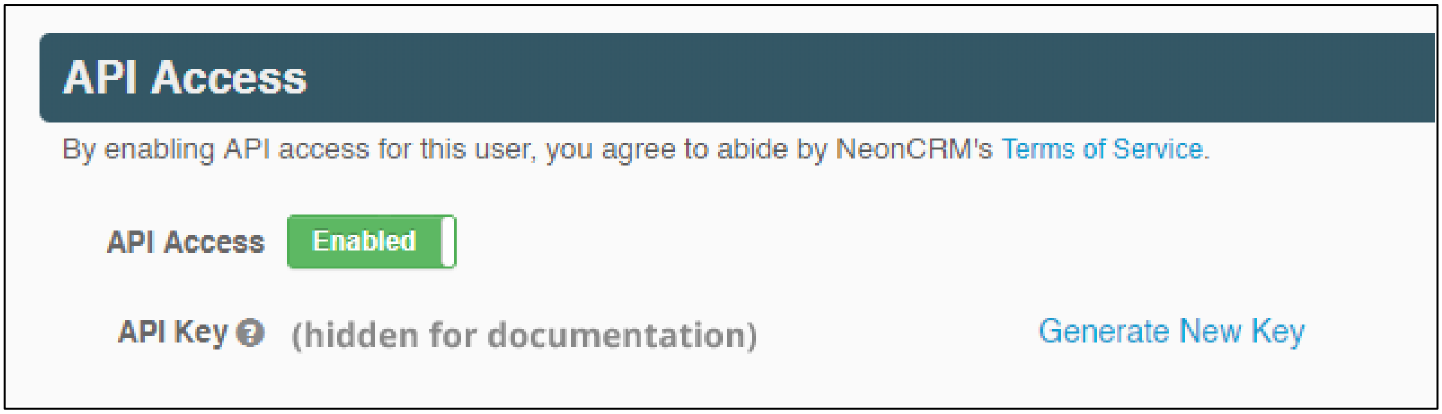
A. Copy your API Key from NeonCRM

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.



API Access

By enabling API access for this user, you agree to abide by NeonCRM's Terms of Service.

API Access: Enabled

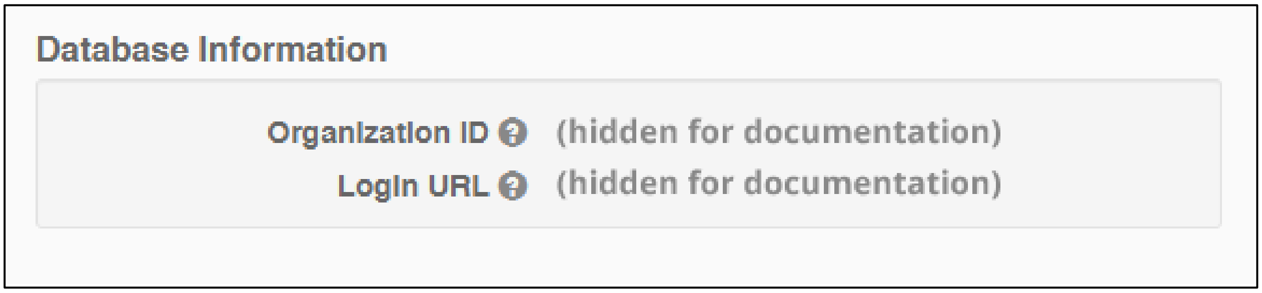
API Key: (hidden for documentation)

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.



Database Information

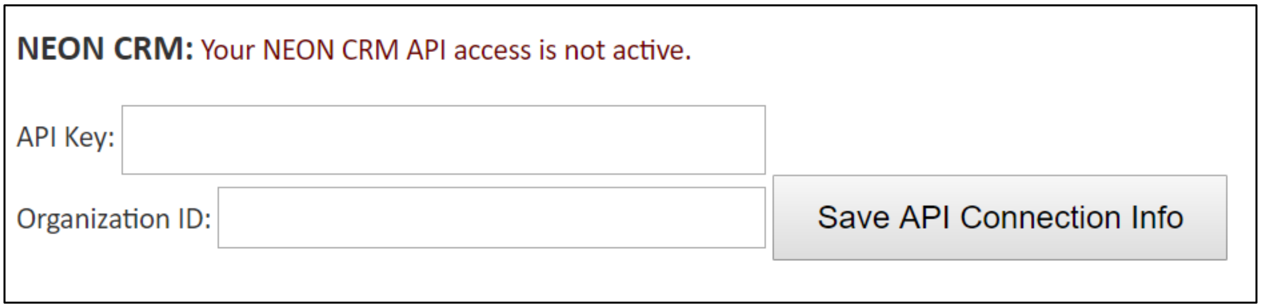
Organization ID: (hidden for documentation)

Login URL: (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.

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

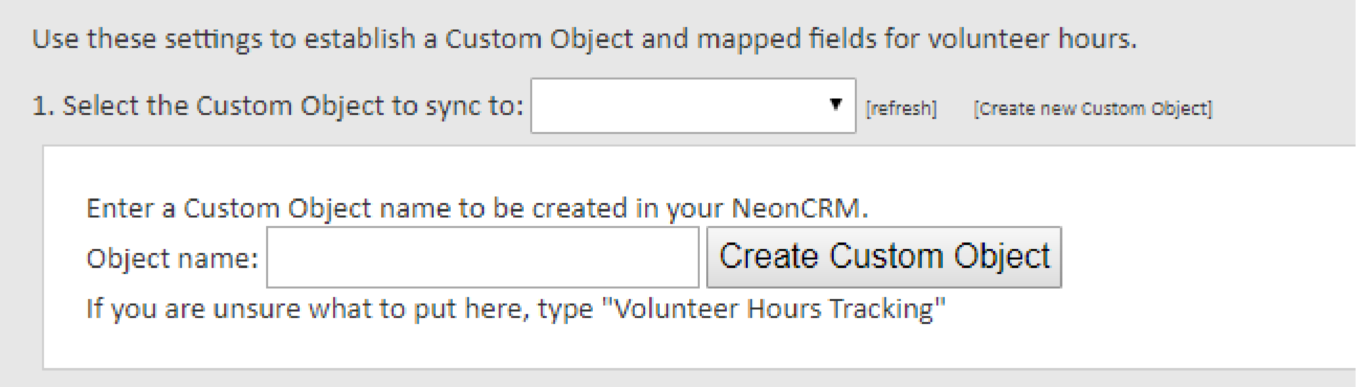
A. Create a new NeonCRM Custom Object from within VolunteerLocal

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.

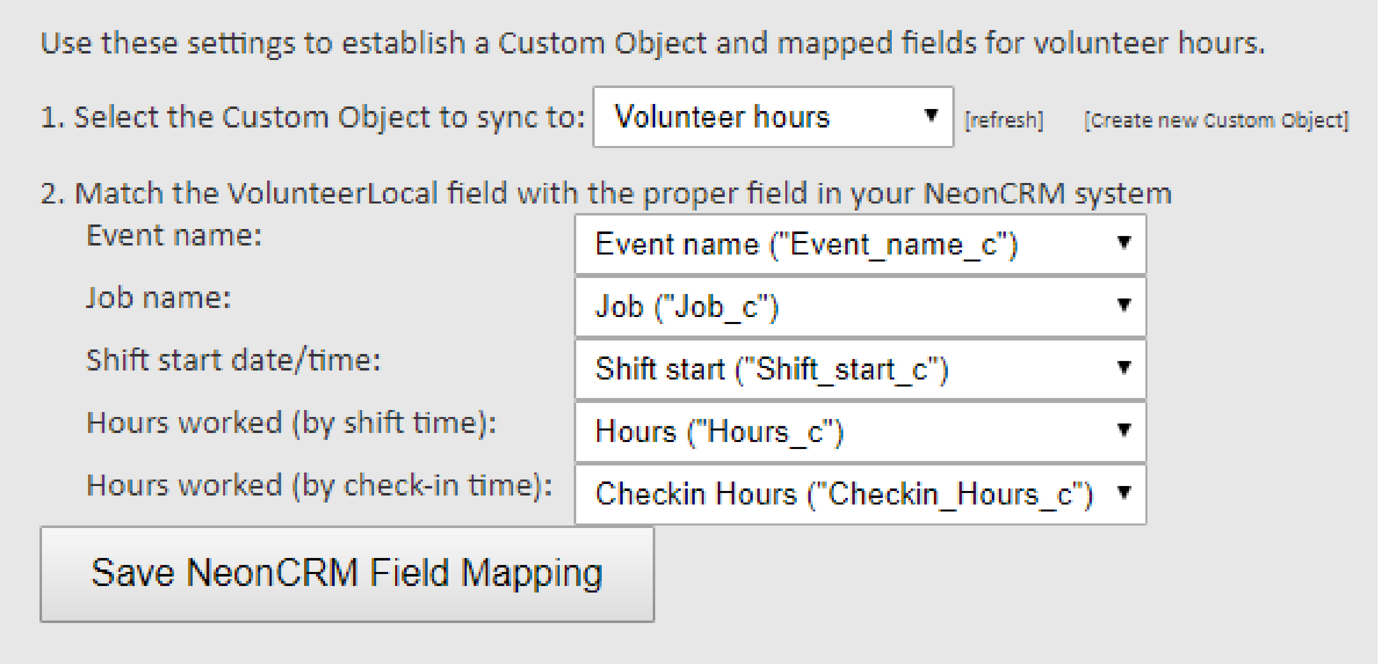
1. Select the Custom Object to sync to: ▾ [refresh] [Create new Custom Object]

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: Volunteer hours ▾ [refresh] [Create new Custom Object]

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") ▾

Step 3: Select/map the fields to synchronize

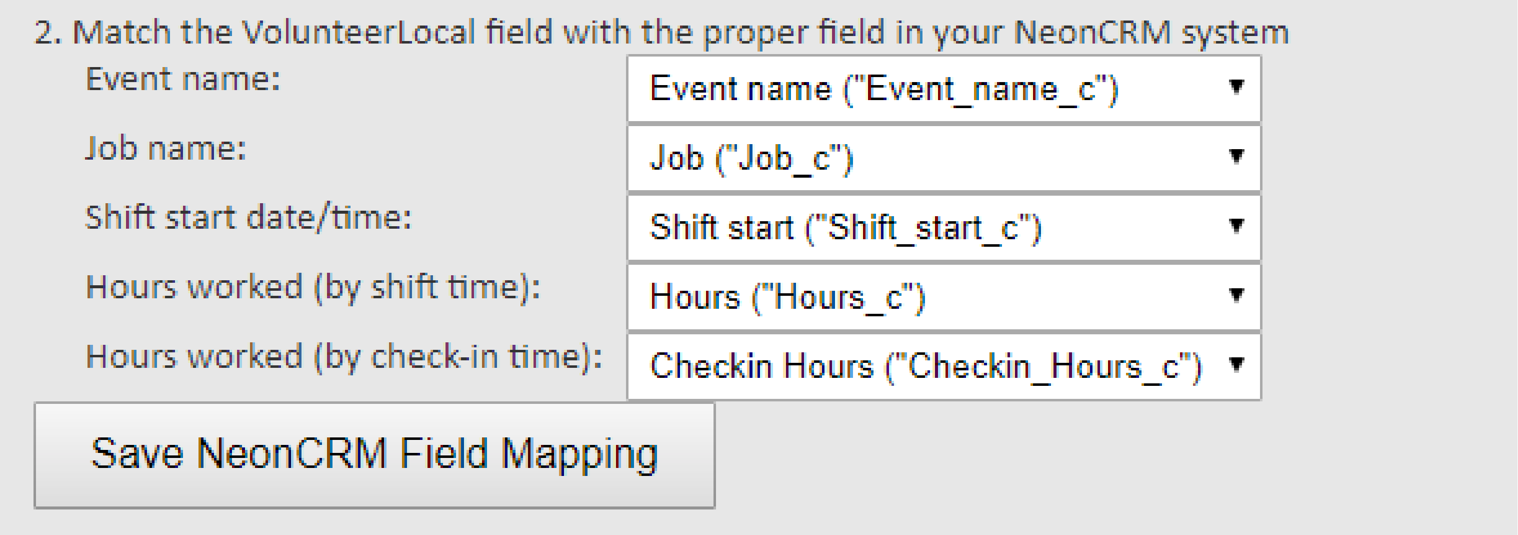
A. Use the dropdown to select the NeonCRM field (on the right) to synchronize with the corresponding VolunteerLocal field (on the left).

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")

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

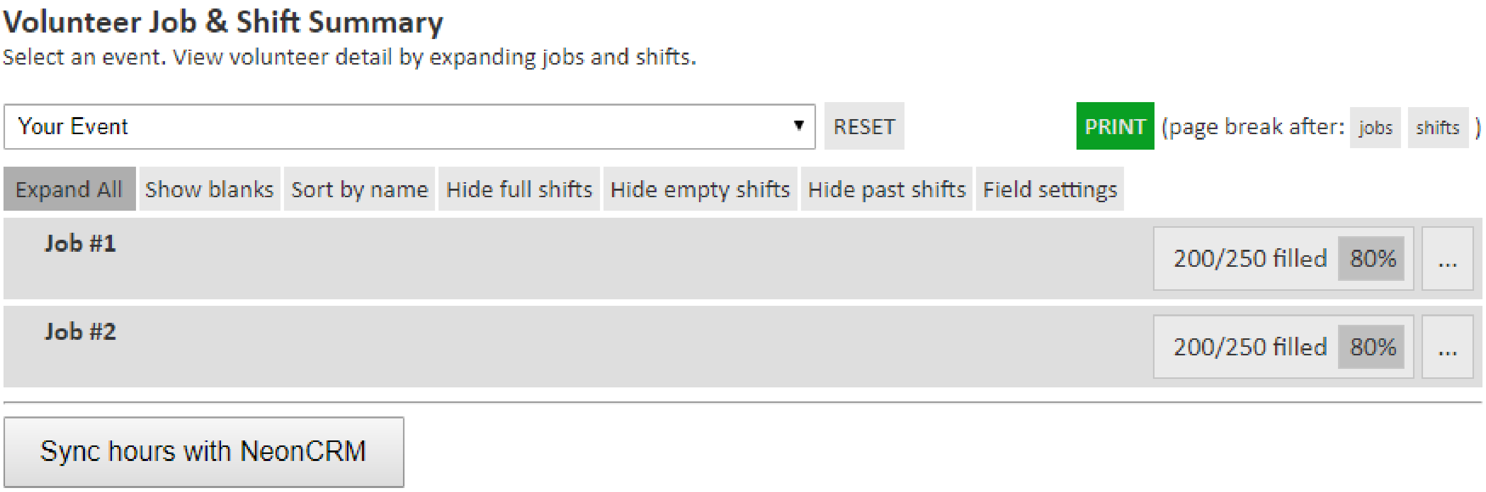
- If no match is found, VolunteerLocal will create an Individual Account in NeonCRM; at the time of this document release, the Individual Account will be created with a first name, last name and email address.

- 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.



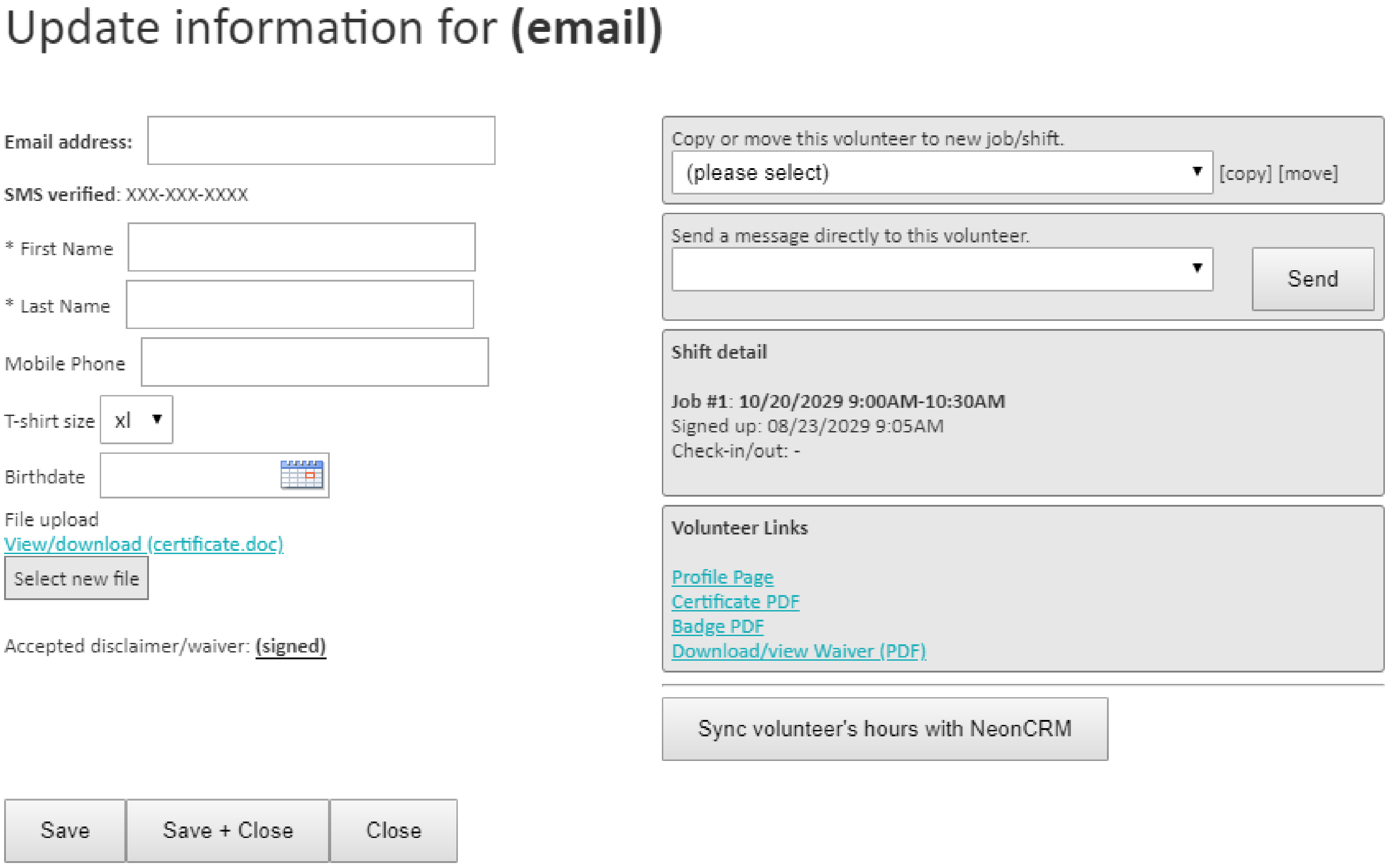
Volunteer Job & Shift Summary

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

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: xl

Birthdate

File upload
View/download (certificate.doc)

Accepted disclaimer/waiver: **(signed)**

Copy or move this volunteer to new job/shift.
(please select) [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”.