

One seamless experience across the community.

OVERVIEW OF SALESFORCE INTEGRATION

The Unite Us Platform is available in Salesforce through the Salesforce AppExchange. The application gives organizations that manage client information in Salesforce easy access to the Unite Us Platform without leaving their system, allowing them to send and receive secure electronic referrals for social services as part of their typical workflow.

- **Partner Name:** 
- **Product Name:** The Unite Us Salesforce integration will work with any instance of Salesforce on Enterprise or Unlimited editions, including custom Salesforce solutions and any of Salesforce's existing cloud products (e.g. Health Cloud, Service Cloud, Sales Cloud, etc.) The customer will need to be using Salesforce Lightning version.
- **Common Use Cases:** Case managers, care coordinators, social workers, and those who send social care referrals at local government agencies, healthcare providers, community-based organizations, nonprofits, and other organizations using Salesforce to manage client information.



Benefits of Salesforce Integration:

- Integrate your Unite Us workflow seamlessly into your existing Salesforce workflow—saving time while reducing the potential for data entry errors—to get clients connected to the services they need.
- Create cases and easily send and respond to referrals from directly within Salesforce.
- Launch directly into the specific client record in Unite Us with an automatic integration of client demographic information from Salesforce.

“By utilizing the Unite Us network, our staff will be able to easily develop relationships with community partners, enabling us to improve the lives of individuals living in our communities.”

— Brianna Fimbres, Community Services Manager, Cesar Chavez Foundation

IMPLEMENTATION OVERVIEW

Integration Considerations and Requirements:

- Operating any instance of Salesforce on Enterprise or Unlimited editions
- Operating on Salesforce Lightning version (not Salesforce Classic version)
- Client record must include first name, last name, and date of birth
- The Unite Us client launch point needs to be placed on a standard Contact, Person Account, or a custom Unite Us Client object configured in Salesforce; if you are using a custom object in Salesforce the Unite Us team will work with you to provide technical guidance on mapping from your custom object to a standard object to complete the workflow.

IMPLEMENTATION OVERVIEW (CONTINUED)

Timeline

As part of the implementation process, Unite Us notifies Salesforce of your project, and their team assigns project management support. This typically takes eight to 10 weeks following project kick-off and resource alignment. Your implementation team will work with you to plan accordingly at the time of launch. The exact timing depends on factors such as the number of users and the speed of decision making.

Recommended Personnel

Including the following personnel ensures the smoothest possible implementation.

Role	From	Responsibilities
Project manager	Your organization	➤ Coordinates team and operational meetings
Salesforce administrator	Your organization	➤ Configures the integration and workflow in Salesforce
Security team	Your organization	➤ Validates security

HERE TO ANSWER YOUR QUESTIONS

➤ Where does the Unite Us application appear within Salesforce?

- Given Salesforce's configurability, you can choose the location of the Unite Us application to suit your organization's unique workflows.
- The Dashboard launch point can be added to several locations in Salesforce, such as:
 - Lightning page
 - Standalone lightning page
 - Home page
 - Lightning Experience App navigation menu
- The Patient/Client launch point can be added directly to the client or contact page.

➤ How are clients in Salesforce matched with clients in the Unite Us Platform?

- Unite Us uses search and match logic from client/patient identifiers provided by Salesforce—at a minimum, first name, last name, and date of birth. These identifiers are required to be able to launch Salesforce from a patient/client record.
- Depending on the match percentage, a match is made or suggested to the user, or a new patient record is automatically created.

➤ Will Salesforce reports display Unite Us information?

No, the Unite Us Salesforce integration does not update discrete data fields in Salesforce with Unite Us referral activity. Instead, utilize Unite Us in-app exports to retrieve data and reports on your organization's social care activity in Unite Us.

➤ Interested in learning more? Connect with us at www.UniteUs.com/demo