EventbriteSync Documentation

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Getting Started

If you're unfamiliar with EventbriteSync or are setting it up for the first time in a complex environment, it is highly recommended that you do so in a recently created or refreshed sandbox. This provides you a trial run of the process, from installation to configuration and running your first imports, without affecting your production org.

Definitions

Eventbrite Entities - The Eventbrite.com data objects that are importable to Salesforce. IE: Events, Orders, Ticket Types, Order Line Items, Buyers, Attendees, Questions & Answers, Barcodes, and Promotional Codes.

Import Objects - The EventbriteSync App includes several Custom Objects that are used when importing data. Each importable Eventbrite Entity has its own Import sObject with relevant Custom Fields to hold the data provided by the Eventbrite API.

Installation

Please visit Eventbrite Spectrum for information relating to the latest release of EventbriteSync for Salesforce.

Getting the Latest Version

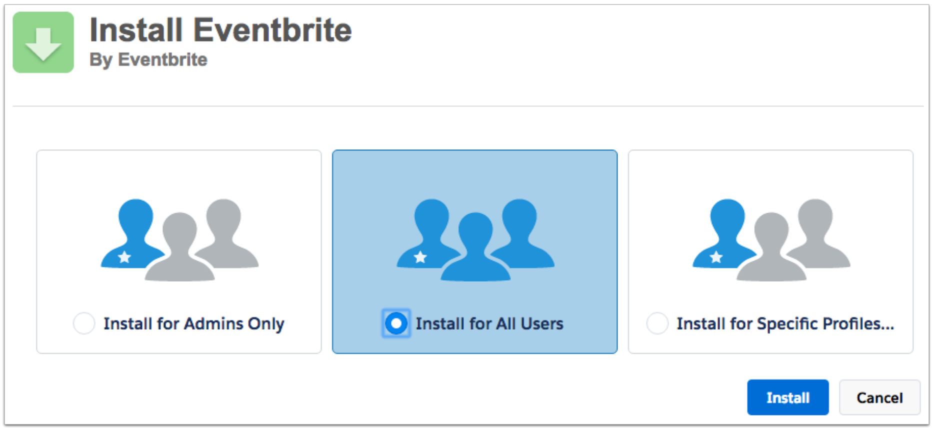
Reach out to your Eventbrite Representative for the installation link. To begin the process of installing EventbriteSync into your Salesforce organization, or upgrading an existing version already installed, click on the blue "Get Started" button.

Logging into your Org

If you're not already logged in, login to the org where you want to install EventbriteSync. This can be either a production or a sandbox environment. Make sure you use the Production or Sandbox installation links as provided by Eventbrite.

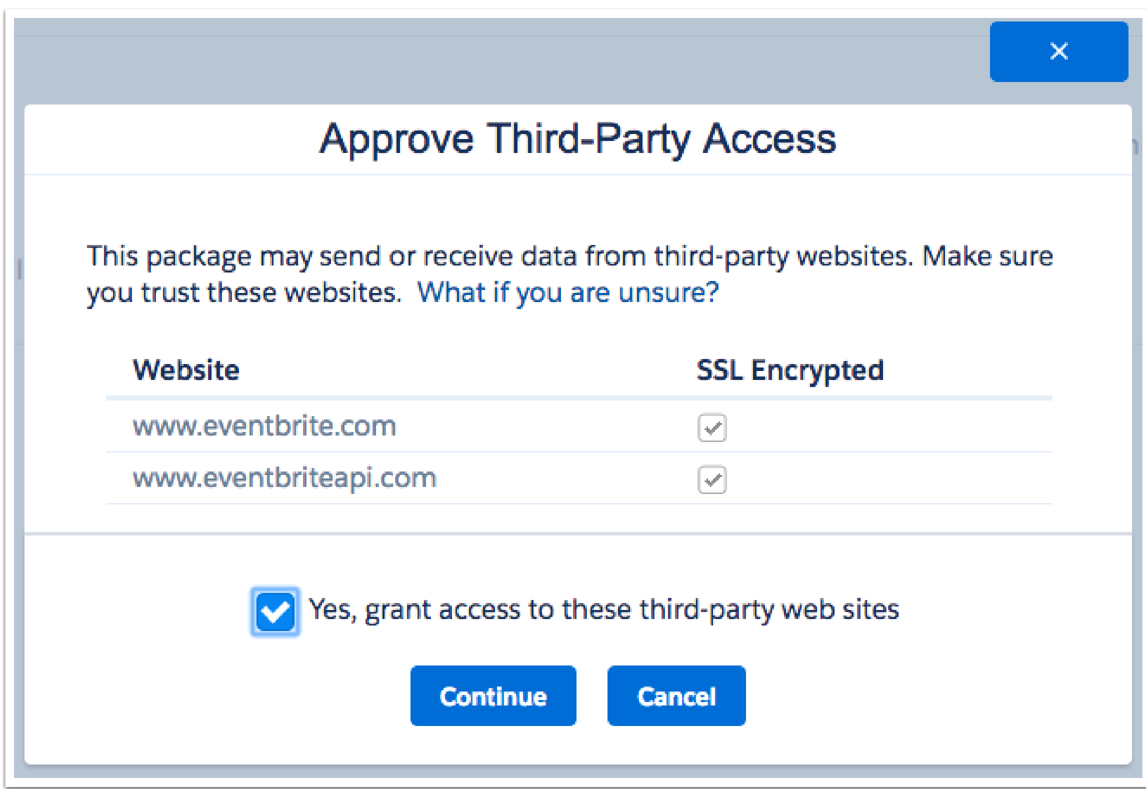
Default Permissions

The next screen will prompt you to choose your default installation permissions. It is recommended that you choose the middle "Install for All Users" to ensure all of the the objects and fields are available to to your users. If you choose one of the other options, please ensure that you manually update all necessary users profiles to include access to these objects and fields.



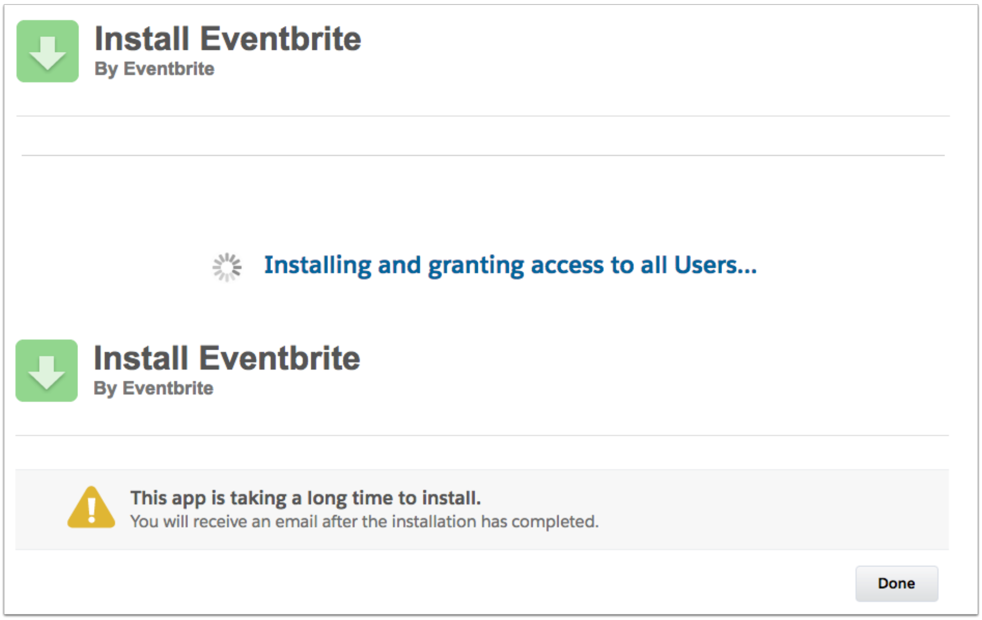
Third-Party Access

The EventbriteSync App makes callouts to the Eventbrite APIs. The next screen you see defines what the base URLs are that the package uses. Check the box next to "Yes, grant access to these third-party web sites" and click on the "Continue" button.



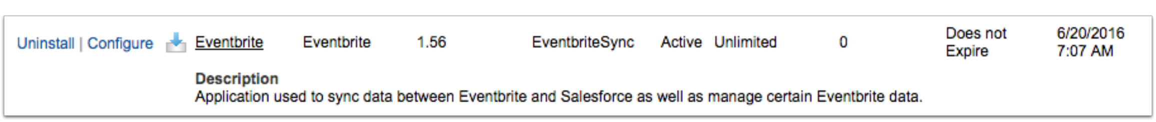
Installation Started

At this point, installation will begin. Depending on your org, you may receive a confirmation message, confirming installation is complete or a message indicating that the install process is taking while.



Installation Completed

After a few minutes, your page will refresh or you'll need to click on the "Done" button. If you navigate away from the page, you can always re-access the Installed Packages screen by navigating to Setup --> Installed Packages to confirm installation and the version number installed.



App Limitations

The intention of the App is to provide Eventbrite and Salesforce customers an easy way to bring Eventbrite.com data into Salesforce. This is achieved using either the simple “Import Only” method where a set of App provided Custom Objects are used to hold the Eventbrite.com data or the more advanced “Import and Process” method that allows complex mapping of Eventbrite.com data to other Standard and Custom Salesforce objects and fields.

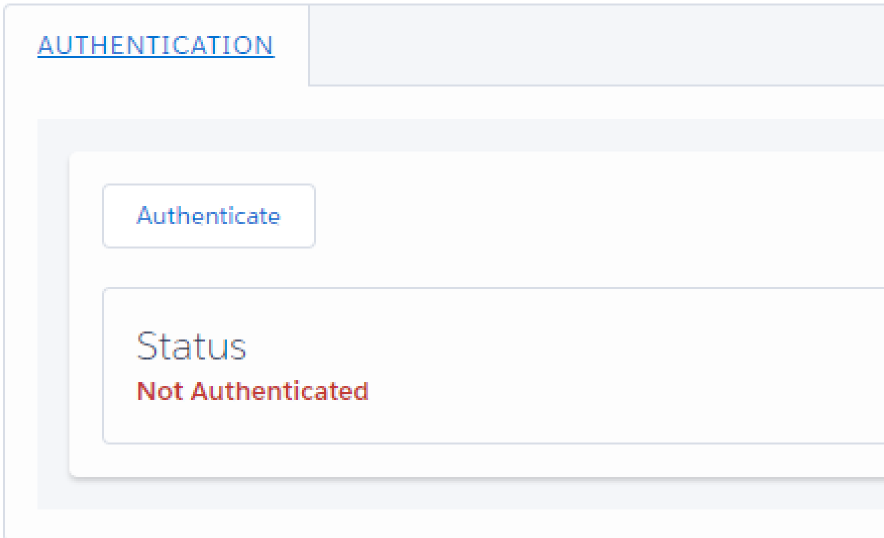
While the feature set of the app will continue to grow over time, there are a few limitations that should be understood before using the app to prevent wrong assumptions from being made.

- The app does not provide a full 2-way sync of data between Salesforce and Eventbrite. The manual and scheduled abilities of the app import data from Eventbrite.com into Salesforce only at this time.
- The app has access to many of the Eventbrite entities (events, orders, etc), but not all. Eventbrite invitation and invitee data is currently not importable.
- Previous versions allowed the ability to map Attendee Questions to Salesforce fields. This is no longer offered and is being revisited to ensure maximum compatibility and efficiency when importing and processing your data.
- When using the advanced processing options, you’ll have the ability to set up complex mapping options and rules. The abilities of the mapping page will continue to be enhanced overtime, but currently has some limitations.
    - The ability to map one Eventbrite data point to multiple fields (ie. Event Capacity to Custom Field A and Custom Field B).
    - The ability to map parent entity data to child entity fields (ie. populate Event Name on an Attendee’s Contact record). This limitation can often be remedied by introducing cross-object workflow or your own Apex logic.

First-Time Use

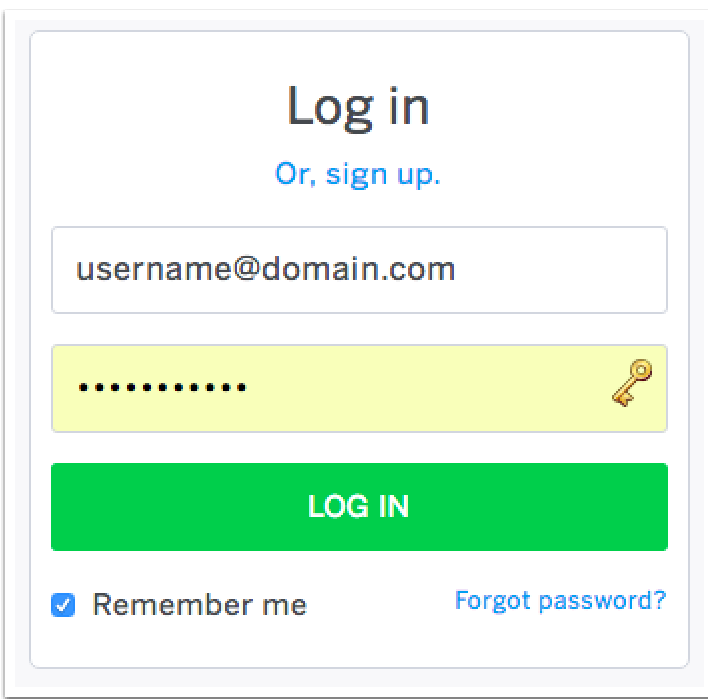
Authentication - 1

You will be prompted to authenticate the Salesforce App with your Eventbrite.com account. Click on the "Authenticate" button to begin this process.



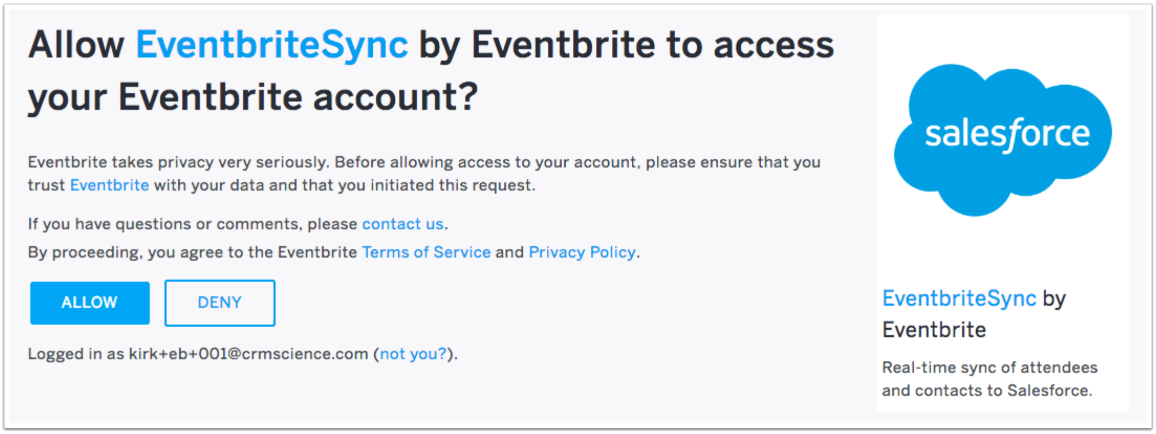
Authentication - 2

On the next screen, provide your Eventbrite.com username and password. Then click on the green "LOG IN" button.



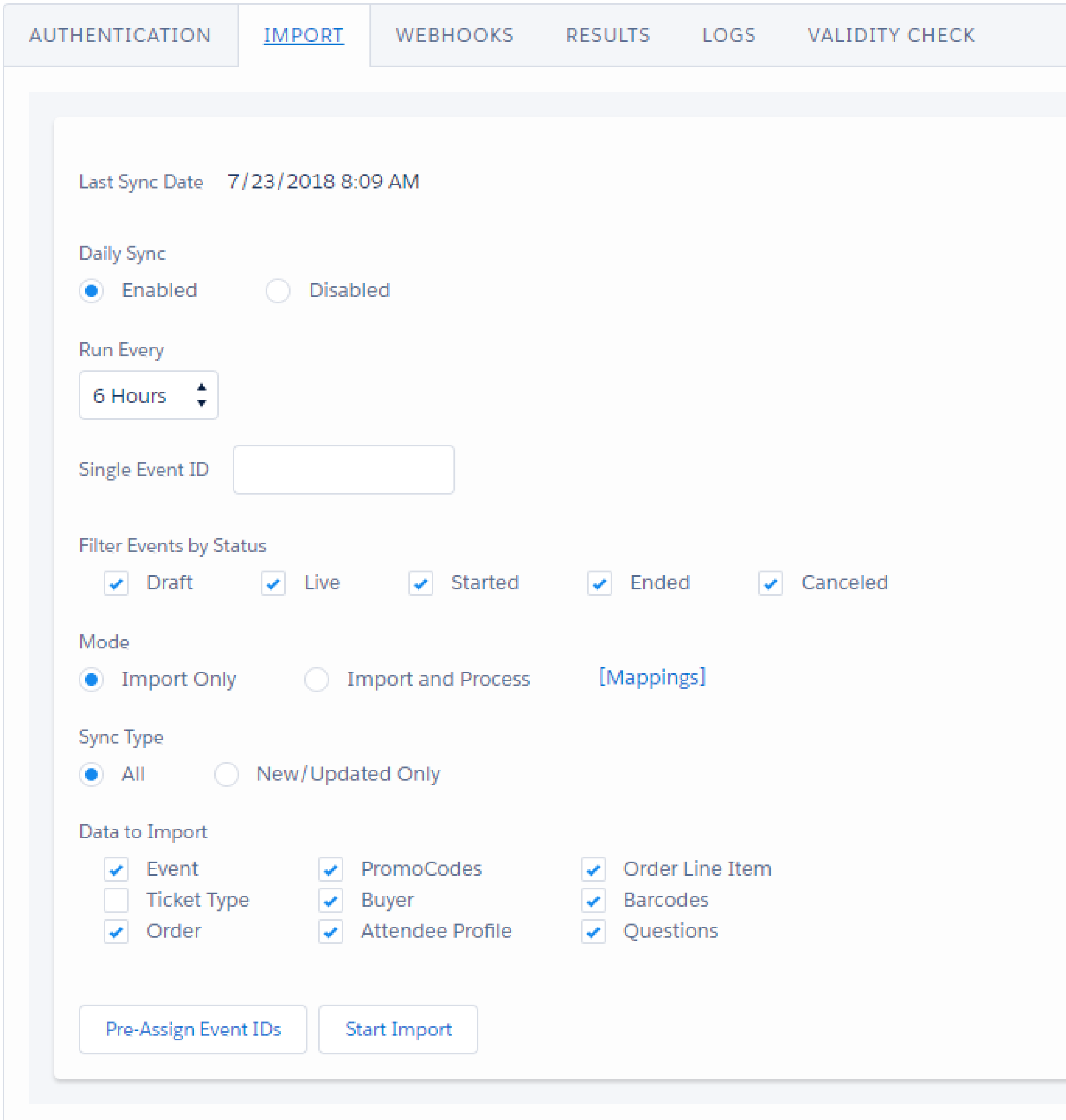
Authentication - 3

Confirm that you want to provide your Salesforce account access to your Eventbrite account by clicking on the blue "ALLOW" button.



Authentication - 4

Authentication will be complete after you are taken back to the main "Eventbrite" Tab.

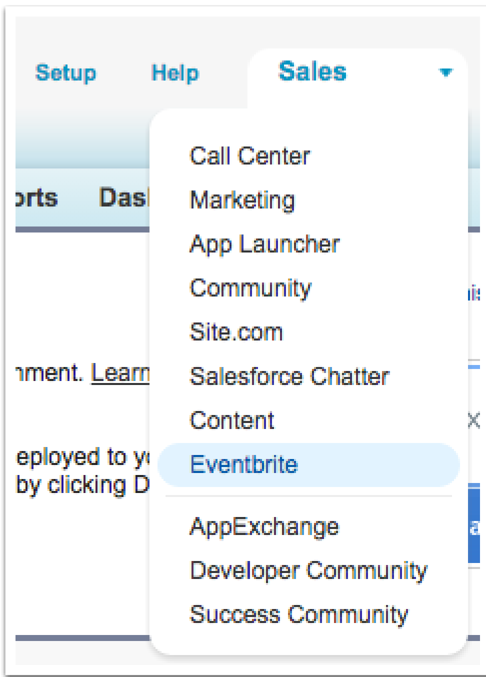


First Steps

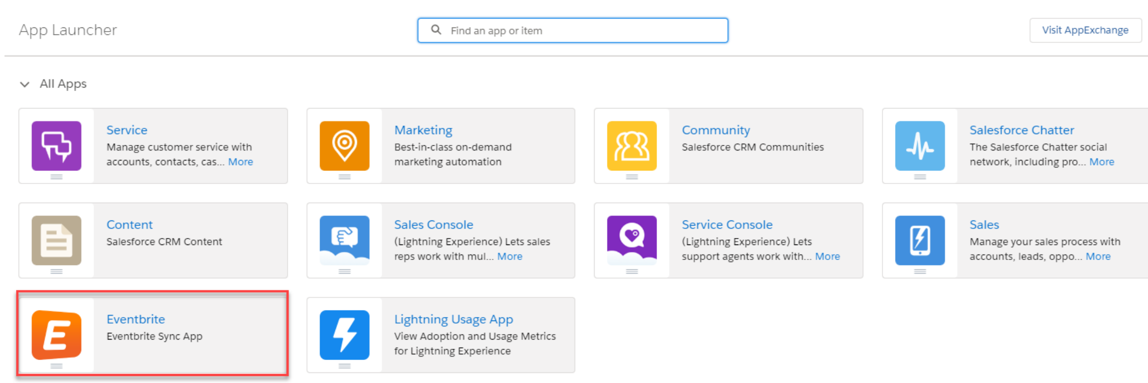
By default, the EventbriteSync App will be configured to import all Eventbrite "Entities" (IE: Events, Orders, etc) to the Eventbrite App's Custom Objects.

Get to Know the App and its Parts

From the App-picker dropdown in the upper-right hand corner, selected "Eventbrite" to access the core Tabs related to the EventbriteSync App.

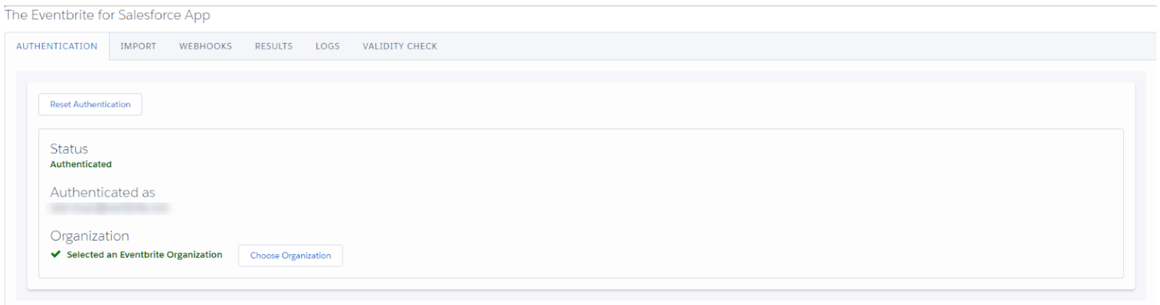


If you’re using Ligntning Experience, instead use the App-Launcher in the top left and select "Eventbrite" to access the core Tabs related to the EventbriteSync App.



Tab: Eventbrite - Authentication

This is the tab that will let you reset your credential being used to connect to Eventbrite, as well as give you the option to change which Organization records will be imported from.



Tab: Eventbrite - Import

The Import Options control the configuration settings of the Import process.

1. See when the last sync process occurred.

2. You can set up the import process to sync at a specific time interval by using the daily sync option and selecting an interval.

3. Specify an individual Eventbrite.com Event Id here and the "Start Import" button will sync only a single Event as opposed to all Events.

4. If you prefer to include only Events with certain statuses, choose those statuses here. By default, all are selected.

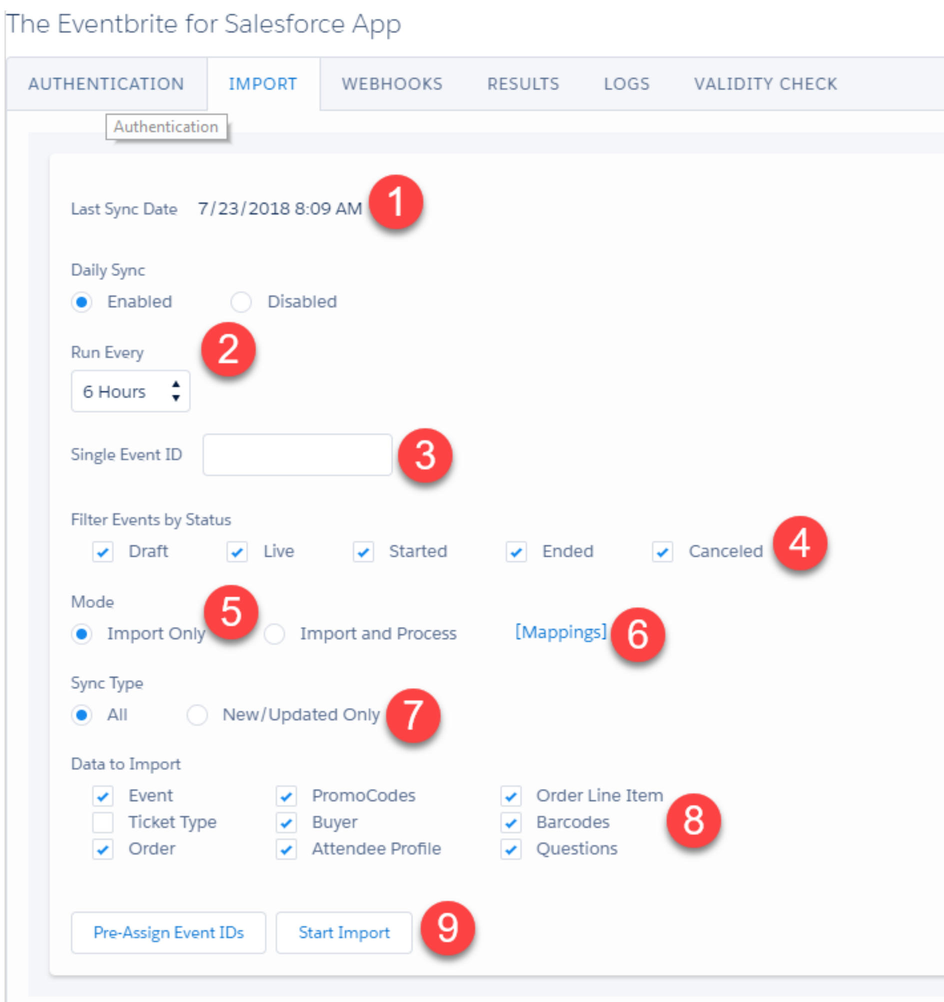
5. The EventbriteSync App provides a complex mapping utility that allows you to map your Eventbrite data to your existing Salesforce sObjects This process is covered more thoroughly later. Select “Import and Process” here to enable that mode.

6. Use the Mappings link to get to the Advanced Object and Field Mappings configuration page.

7. After an initial import of all your data, you can enable the “New/Updated Only” option to import only data that has been created or modified since the start of your last sync job.

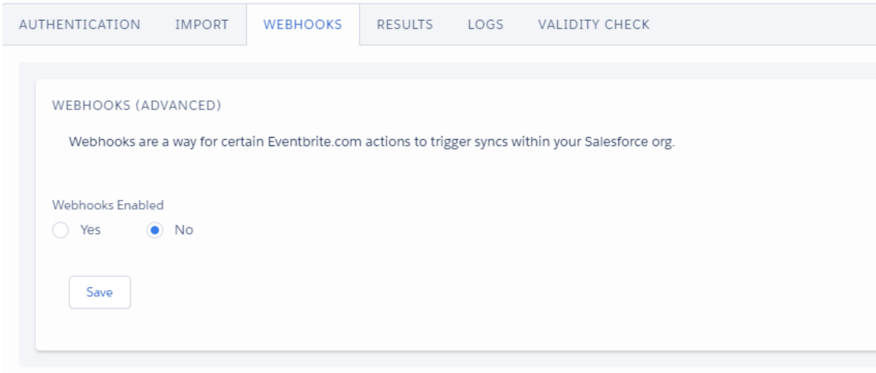
8. Choose which "Import Entities" are retrieved from Eventbrite.com and created as records in Salesforce here.

9. You can manually begin an import process by clicking on the "Start Import" button. To stop the process, click on the "Stop" button that replaces the "Start Import" button once running.



Tab - Eventbrite - Webhooks

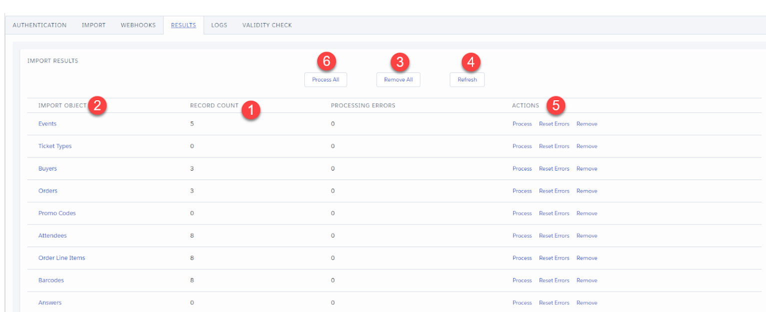
Webhooks are another way for you to keep your Salesforce records up to date. When enabled, as Events are published and unpublished or Orders are placed, your Salesforce org is notified and the app makes callouts to retrieve the data. This feature will be covered in more depth within the "Webhooks" section of this documentation.



Tab: Eventbrite - Import Results

The "Import Results" section of the "Eventbrite" Tab allows you to see the number of records imported.

1. The number of records by Import Entity
2. Links to access the standard Salesforce "Views" for that Import Object
3. The "Remove All" button will allow you to clear all of your Imported data.
4. The "Refresh" button will allow you to refresh the table below, allowing you to see the latest record counts.
5. The “Actions” column allows you to “Remove All” records for the specific Import Object.
6. The “Process All” button will queue the records in these objects to process into the destination target objects. For more information about processing, see the “Import and Process” documentation section.



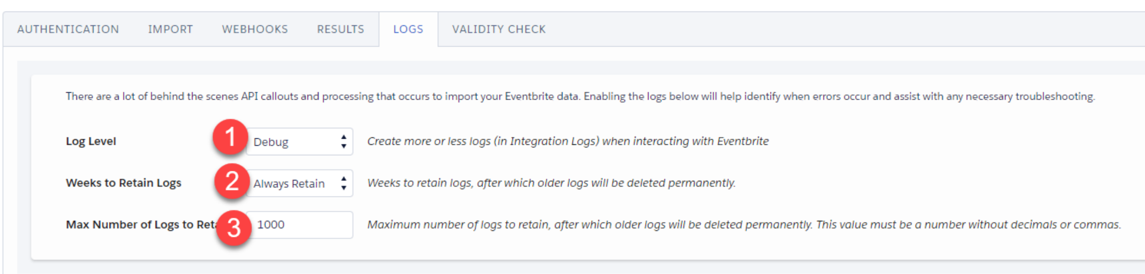
Tab - Eventbrite - Advanced - Debug Logging

If you run into an issue importing your data, you can enable more verbose Debug Logs that will capture details of when various EventbriteSync App job functions start/stop as well as the details around any callouts to the Eventbrite API. These logs appear on the "Eventbrite Integration Log" Tab.

1. By default, the "Log Level" is set to "Error" which will yield Eventbrite Integration Log records in the event of an import or processing error. For a more granular level of information, change this dropdown to "Debug."

2. The logging ability can generate a lot of records over time. The "Weeks to Retain Logs" option will automatically delete any log records older than the number of weeks selected here.

3. The value set in “Max Number of Logs to Retain” will prevent more than that number from being saved. When the number is reached, any excess are deleted (preserving the newer records and deleting older).



Tab - Eventbrite - Advanced Object and Field Mappings

The EventbriteSync App provides a complex mapping utility that allows you to map your Eventbrite.com data to your existing Salesforce sObjects (standard or custom). This process is covered more thoroughly within the "Import and Process" section of this documentation.

1. Click the “Show Advanced” button to display the “Advanced Processing” section.

Tab - Eventbrite Integration Log

This tab will show you the standard Salesforce Tab of the Custom Object, allowing your to define custom "Views" to filter the log records. Each log record will be an indicator of an import or processing job start/stop, numbers of records processed, API callout and response details, and more.

Import Objects

The below objects are used when the app is set to the default "Import Only." Each object has a set of Custom Field relating to that specific Eventbrite Entity (IE: Event has Event related fields, Order has Order related fields, etc). When used in the "Import and Process (Advanced)" configuration, these objects and their related records are treated as a queue to be used by the mapping and processing agent to match existing/create records new records as defined by you in the mapping UI.

- Eventbrite Answer (Import)
- Eventbrite Attendee (Import)
- Eventbrite Barcode (Import)
- Eventbrite Buyer (Import)
- Eventbrite Event (Import)
- Eventbrite Order (Import)
- Eventbrite Order Line Item (Import)
- Eventbrite Promotional Code (Import)
- Eventbrite Ticket Type (Import)

For Mapped Processing (Advanced)

If using the "Import and Process (Advanced)" configuration, these Custom Objects are provided and used to connect/relate to the standard and custom objects you define in the mapping UI for Events and Orders.

- Eventbrite Order Line Item
- Eventbrite Ticket Type
- Eventbrite Question
- Eventbrite Promotional Code
- Eventbrite Barcode

Other

- Eventbrite Integration Log - Custom Object used for retaining import/processing job, callout, and other details.

Future Use

- Eventbrite Team

Deprecated

These objects provided previous functionality but have been deprecated and likely superseded by new objects.

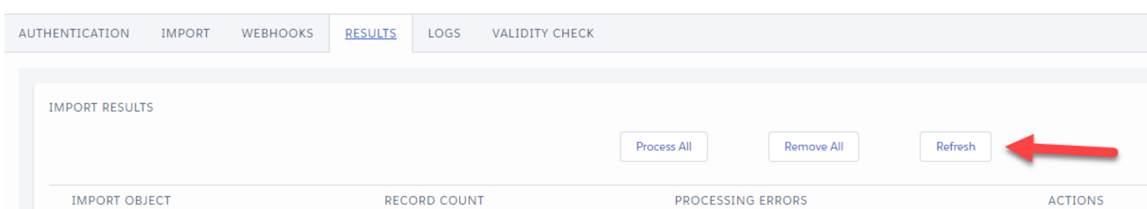
- Eventbrite Answer
- Eventbrite Order Ticket Type

Import Only

By default, the App will only import your Eventbrite.com data into the app provided Custom Objects. To begin a non-scheduled/manual import, access the "Eventbrite" Tab and click on the "Start Import" button.

Monitor Progress

As the import process runs, you can click on the "Refresh" button on the Results tab to observe the import process.



Import and Process (Advanced)

A more complex feature exists within the App that allows you to both import the data into your Salesforce environment and map the data to standard and custom objects of your choice.

This process can be broken down into two major parts:

1. Import the Eventbrite data into the App provided "Import" Custom Objects

2. Process the "Import" Custom Objects' records, leveraging the mapping UI's configuration (which objects, fields, and other options to use).

Note: This is an advanced option that can be misconfigured, resulting in overwritten or duplicated data. Please test your configurations in a sandbox org that mirrors your production org as closely as possible. Use a "Full" sandbox type when possible.

Default Mappings

Below are the default object level mappings:

- Events to Campaigns
- Orders to Opportunities
- Buyers to Contacts
- Attendees to Contacts

Eventbrite Data Type	Target Salesforce Object	Description
Events	Campaigns	An Eventbrite Event in which your customers can place orders against to attend
Orders	Opportunities	Individuals/Customers place Orders for tickets for themselves (and possibly additional Attendees) for your Events

Ticket Types	Eventbrite Ticket Types (Custom Object)	All of the various free, paid, etc Ticket Types configured in Eventbrite.com for your Event(s)
Order Line Items	Eventbrite Order Line ITems (Custom Object)	Each Order may have 1 or more Attendees (including the buyer) - OLIs are children of Orders, providing breakdowns per attendee included on the Order (e.g. John Smith and his 4 family members would result in 5 OLI records)
Buyers	Contacts	Each Order has one person making the purchase - this is the Buyer
Attendees	Contacts	Each Order has at least one attendee (can be the Buyer), but may include several depending on the Order Form
Questions	Eventbrite Questions (Custom Object)	If multiple attendees per Order, any Custom Questions asked/answered will be populated here, related to the Attendee's OLI
Barcodes	Eventbrite Barcodes (Custom Object)	Barcodes are the unique identifiers for attendees' tickets

Promotional Codes	Eventbrite Promotional Codes (Custom Object)	Promotional Codes are the discount and access codes that are used when placing the Order

Person Object Types - Defined

Your Eventbrite data is tied to many individuals; each order has a Buyer and can be related to one or many other Attendees.

The EventbriteSync App allows for the mapping of the Buyer and Attendee level information to Leads, Contacts, and Person Accounts (where enabled).

Within the App's configuration screens, you may see "Person Types" - please be aware that this could mean Lead, Contact or Person Account, depending on the scenario.

Person Object Types - Matching Existing

The App is configured to use the combination of a person's First Name, Last Name, and Email address to define uniqueness, preventing as many duplicate records as possible during the process.

Due to the nature of the ordering process, it's not always possible to eliminate all of the potential duplication as buyers and attendees are free to input their own data, providing their own names and email addresses which can be abbreviate and changed over time.

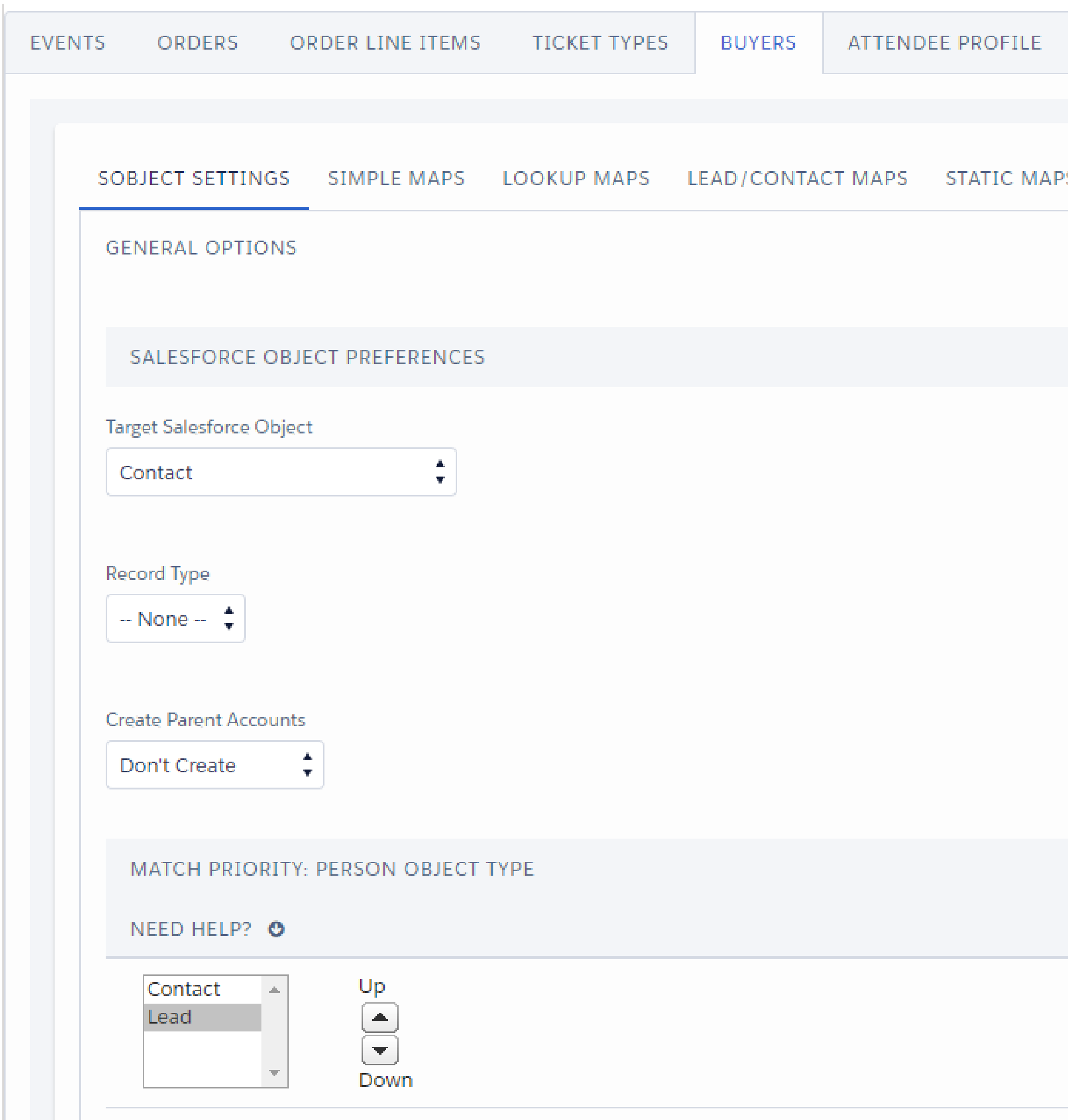
Person Object Types - Matching Priority

The App allows you to define a match priority. This is useful in scenarios where the person matching logic finds multiple record matches across objects (both Leads and Contacts or Person Accounts). This priority tells the import process which record to use as the match, when this occurs.

The default matching priority is:

1. Contacts

2. Leads



Import and Process - Mapping

General Options

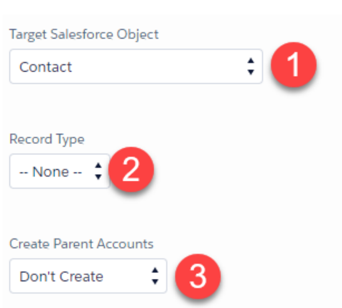
This section allows you to control the major configurations for this object pairing (Eventbrite to Salesforce).

Target Salesforce Object: This dropdown allows you to define which Salesforce Object should be used when creating new and matching existing records for the current Eventbrite Entity.

a. If changing from a default object to a custom object there are additional steps required.
    i. Create new EventbriteId__c external and unique text field
    ii. Create new Lookups on all child related objects
    iii. Update Configuration Mappings for all child related objects to use new lookups
b. For full walkthrough on doing so, see this section (HIGHLY SUGGESTED): Advanced: Changing Target Objects

Record Type: When creating/updating existing records, this dropdown allows you to specify which Record Type (when enabled) to use for those records.

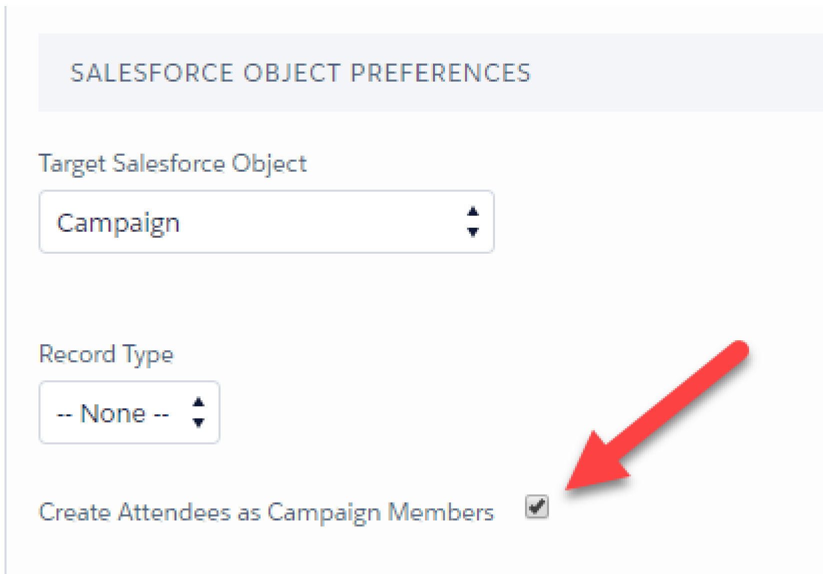
Eventbrite/Salesforce Object Specific Settings: Some combinations of object pairings result in additional objects that will appear in this area (documented below).



General Options - Events/Campaigns

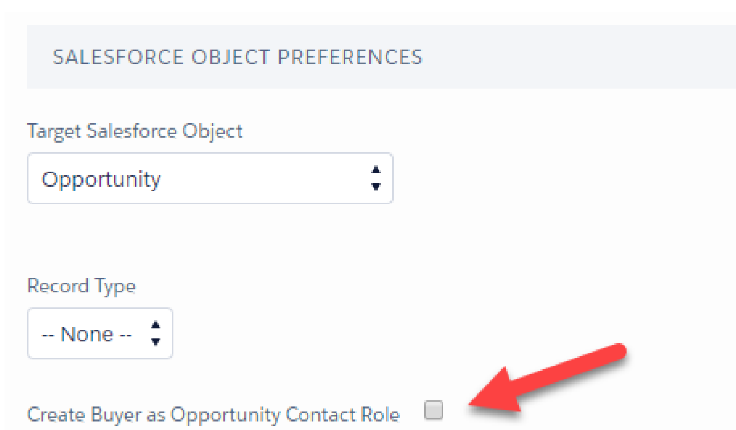
When mapping Events to Salesforce Campaigns, you can choose to create a single Campaign Member record for each Attendee for the related Campaign.

Note: If an individual person appears as an Attendee multiple times on an Order or multiple times across Orders for the same Event, this person will only have a single Campaign Member record. This is a Salesforce limitation to help assist and ensure distribution lists generated from Campaign efforts do not contain duplicate persons.



General Options - Orders/Opportunities

When Orders are mapped Opportunities, there is an additional option that allows you to create "Opportunity Contact Role" records, related to the Opportunity, for the Buyer of that Order.



General Options - Buyers or Attendees/Contacts - Create Parent Accounts

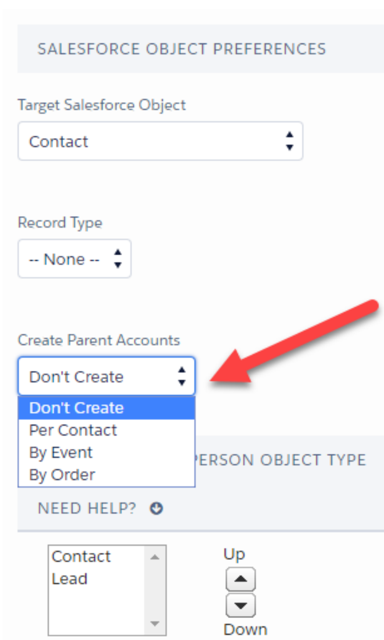
When mapping Buyers or Attendees to Contact records, you have the ability to control how parent Accounts are created for Contacts, created or matched, and are in need of Accounts.

1. Don't Create - No parent Account will be associated with the Contact.

2. Per Contact - Every contact needing an Account (Account field is blank) will have its own Account record created. For example, a John Smith Contact without an Account would yield a new John Smith Account record, which would serve as the John Smith Contact's parent Account. This could yield many additional Account records, created with the Salesforce defaults set for the running user.

3. By Event - To help minimize the number of Account records created, all Contacts are grouped by the Event they are related to. A single Account will be created for that Event and as Contacts related to that Event need parent Accounts, they will be associated with this Event's Account.

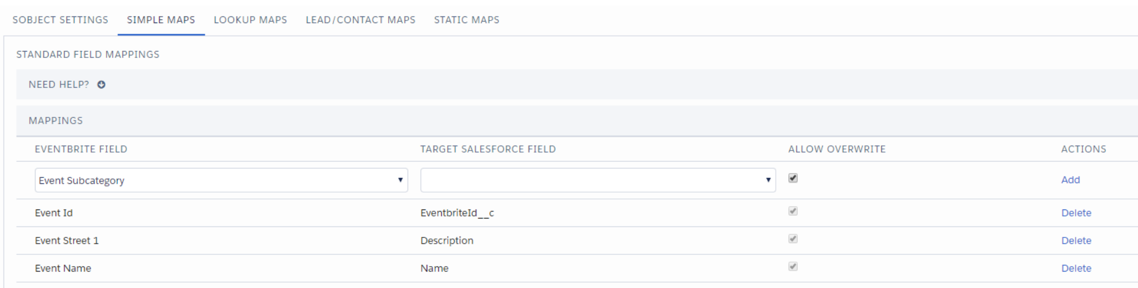
4. By Order - Similar to the "By Event" option, but at the Order level.



Note: To populate the "Account" field on the Opportunity record (Opportunity.AccountId) with the Order Buyer's Account, see this.

Standard Field Mappings

The Eventbrite App allows you to import lots of data points from your Eventbrite data to Salesforce records. The table below allows you to choose which Eventbrite data points you want to include and to which Salesforce field that data point should be mapped to.



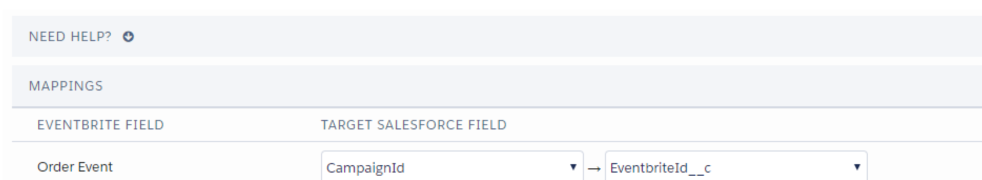
EVENTBRITE FIELD	TARGET SALESFORCE FIELD	ALLOW OVERWRITE	ACTIONS
Event Subcategory		☑	Add
Event Id	EventbriteId__c	☑	Delete
Event Street 1	Description	☑	Delete
Event Name	Name	☑	Delete

Lookup Field Mappings

The imported Eventbrite data relies heavily on relationships defined by various lookup fields. These lookup fields are what allow you to know which Event a specific Order originated from as well as to provide you with various related lists, showing things like all Orders for a specific Event.

Tip: Do not confuse these with the "Object Dependent Mappings." Think of the mappings in this section as "If I'm an Opportunity, these are the Lookup fields that I have to other objects. I may want to populate these fields with values from the Eventbrite API data."

The example below is taken from the Order mapping page where Orders are mapped to Opportunities. This mapping is indicating that the Opportunity's "CampaignId" field should be populated with the EventbriteSync__EventbriteId__c value of the matching Campaign record.



Lookup Person Object (Contacts, Leads, and Person Accounts)

This is section 2/2 where "Lookup" fields can be mapped. As opposed to section 1/2 ("Lookup Field Mappings" above), this section is dedicated to any Lookup fields that lookup to Leads, Contacts, or Person Accounts.

This additional section is necessary due to the possibility of creating or matching different types of records. In some scenarios, you'll be creating records all of one person type (IE Contacts). In others, depending on existing records matched, you might need to populate different fields accordingly (IE: Matched a Contact record, so instead of populating a Lead lookup field, populate a Contact lookup field instead).

This also allows you to populate more complex scenarios as well. In a scenario where you've matched a Contact record, you'll be able to use that Contact's Parent Account value to populate Account lookup fields.

Example: Populating an Account Lookup on the Target Order Object

You may want to populate an Account Lookup field on one of your target objects with the Account of your Order's Buyer.

Necessary Settings:

- Order Target Object: Opportunity (or your object of choice)
- Buyer Target Object: Contact
- Create Parent Accounts: Any Option

Necessary Mappings:

- Eventbrite Object: Orders
- Mapping Type: Map Lead/Contact Lookup Fields
- Mapping: Order Buyer
  - Lead Match: N/A
  - Contact Match
    - Lookup Field: AccountId
    - Use Value From Contact's: AccountId

Static Mappings

A Static Mapping allows you to populate a field with the same value for every record the sync touches on that object during a sync.

For example, put “Eventbrite Event” in the “Lead Source” Field for every Lead created or updated in a sync.

Question Mappings

Looking for the ability to map Event attendee question data to your Salesforce records? This feature is currently being enhanced to provide a better mapping experience. Stay tuned!

Allow Overwrite

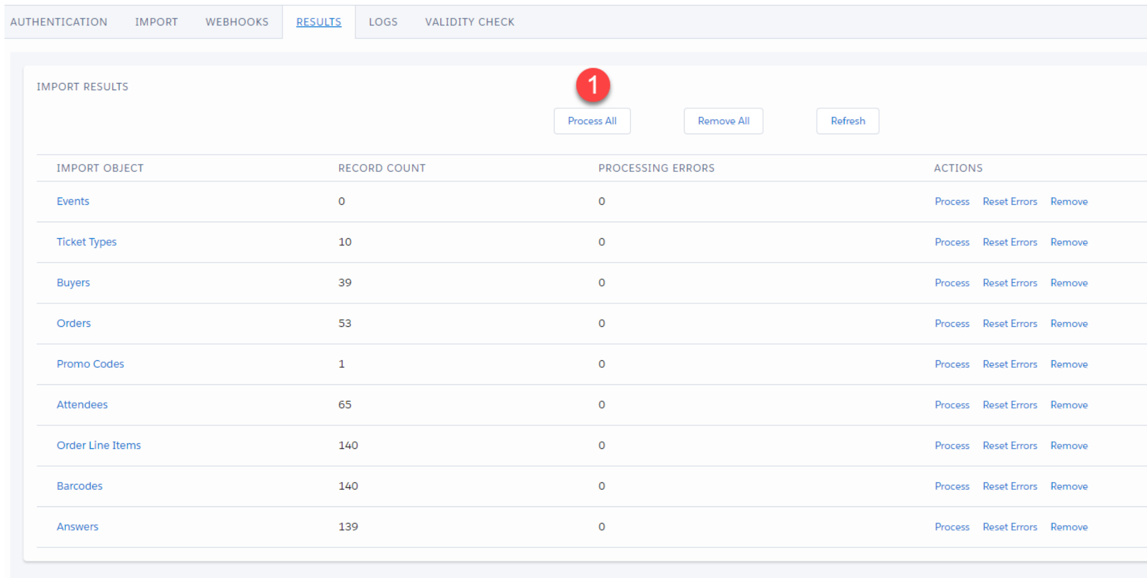
Each of the mapping types allows you to specify an “Allow Overwrite” option. This checkbox controls what happens in update scenarios where records already exist for the imported data and will be updated. When the “Allow Overwrite” checkbox is checked, any mapped fields’ data will be overwritten by the data from Eventbrite, if the Eventbrite data is not blank. If unchecked, the app will only populate or update the fields if those fields are already blank.

Import and Process - Running

Typically, when the "Enable Processing" checkbox is enabled, both the importing of the records from the Eventbrite API and the processing of the import records will occur as one job, whether started manually or automatically through scheduling.

It's also possible for you to deselect the "Enable Processing" checkbox and only Import your records, then later enable processing. This can be helpful in troubleshooting any sort of processing issues. After the import process has completed, check the "Enable Processing" box under "Show Advanced" and then click on the "Process All" button. Alternately, process Eventbrite entities one-by-one, by object type, by using the "Process" link on each object's row.

Note: The objects in the "Import Results" table are displayed in dependency priority. If processing records by object, work your way through the list top-to-bottom to ensure all lookup fields are populated accordingly.

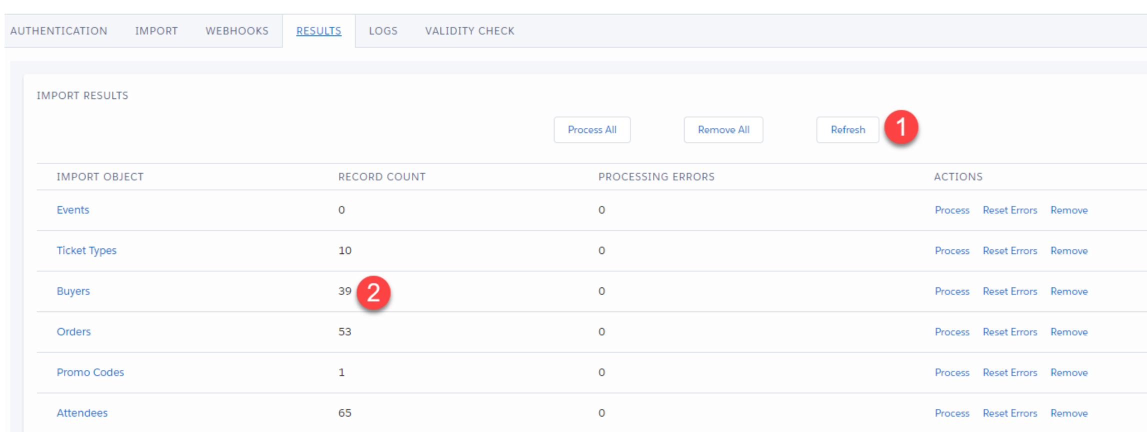


Monitor Progress

1. As records are being processed, you can click on the "Refresh" button of the "Import Results" section to observe the records being processed.

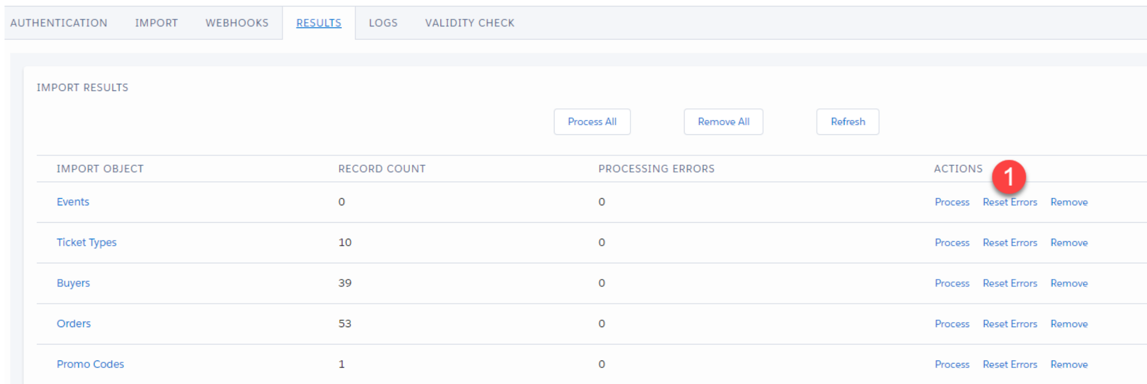
2. When successfully processed, the "Record Count" should be reduced to "0" and

3. the "Processing Errors" count remain at "0."



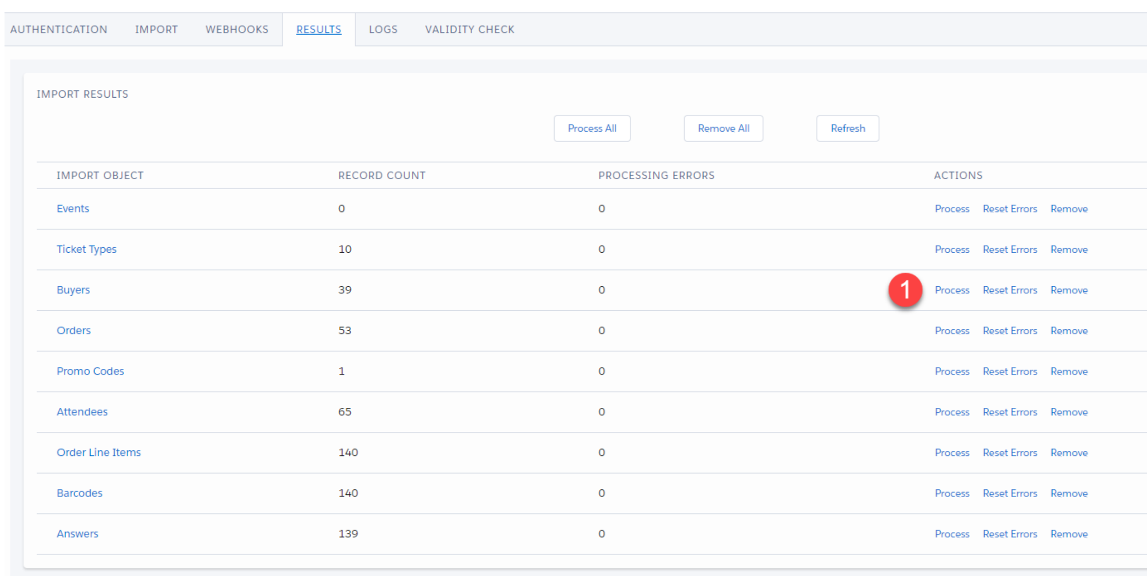
Resetting Errors

When errors are encountered, the "Processing Errors" count will increase. You can use the "Reset Errors" link to clear the "Processing Error" checkbox on all Import records of that row.



Processing by Types

If you are attempting to troubleshoot a processing error, it might might make sense for you to process each Eventbrite data separately. To do this, use the "Process" link on that entity's row.



Import and Process - Errors

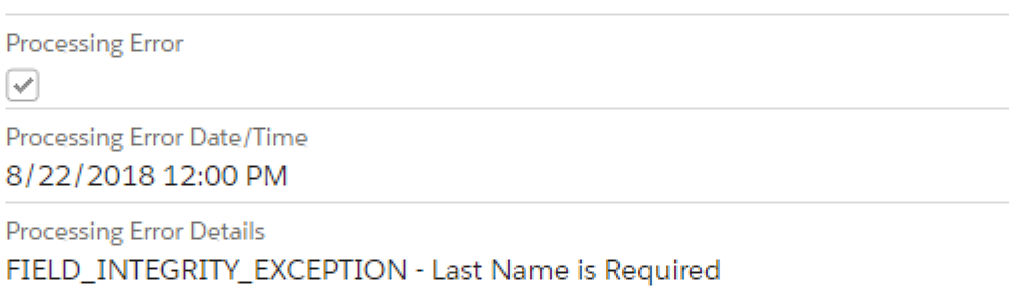
Since the mapping configuration for the EventbriteSync can be complex, it's entirely possible for a configuration to be saved that is not valid. When this occurs, the processing of the Import records may be unable to complete. When this occurs, on each Import record, there are a set of "Processing Error" fields that exist to help you remedy the issue.

Processing Error: A Checkbox to indicate a problem has occurred. Records flagged like this will be skipped over when other similar records are to be processed.

Processing Error Date/Time - The date and time when this record was attempted to be processed.

Processing Error Details - This is where the language will be saved to that will describe why the record could not be processed. Often it will be a mismapping or other configuration issue.

Note: Records being processed are prone to any configured required fields, custom Validation Rules, etc that exist in the system. Any of these that are experienced will be logged in the Processing Error Details field.



Webhooks

Webhooks allow near real-time syncing of Eventbrite Status and Order changes to your Salesforce organization. To enable this feature, you must set up an externally accessible entry point through a Salesforce Site (using the steps below).

Supported Webhooks:

- Event Published/Unpublished

- Order Placed

Upon one of the actions above happening, either an organizer publishing or unpublishing an event or an Event attendee placing an order, a request is made from Eventbrite to your Salesforce org to sync the related Event and all of its details. Salesforce will then make a series of requests to Eventbrite:

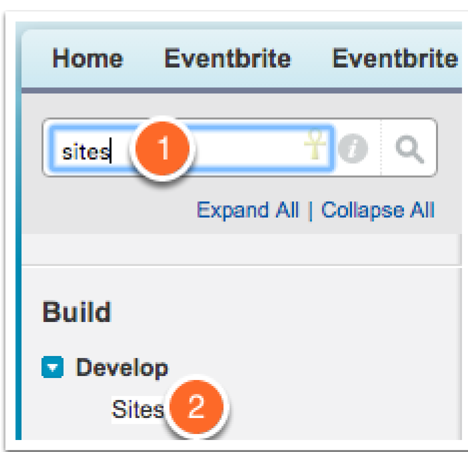
- Event Details
- Ticket Types for the Event
- Orders for the Event
- All Attendees for the Orders of that Event

Full details about the inbound request from the Eventbrite webhook and the resulting requests from Salesforce to Eventbrite can be found under the “Eventbrite Integration Logs” Tab when the “Logging Level” of the App is set to “Debug.”

The result of the Salesforce steps below will be a URL that you will copy and paste into the Eventbrite.com webhook configuration.

Step 1: Accessing the Site Settings

From the Salesforce Setup menu, within the quick find, search for "Sites" and then click on the "Sites" link under "Develop."



Step 2: Registering a Domain

If you have not yet set up a domain yet, you'll need to do so.

1. Enter a domain in the input box.

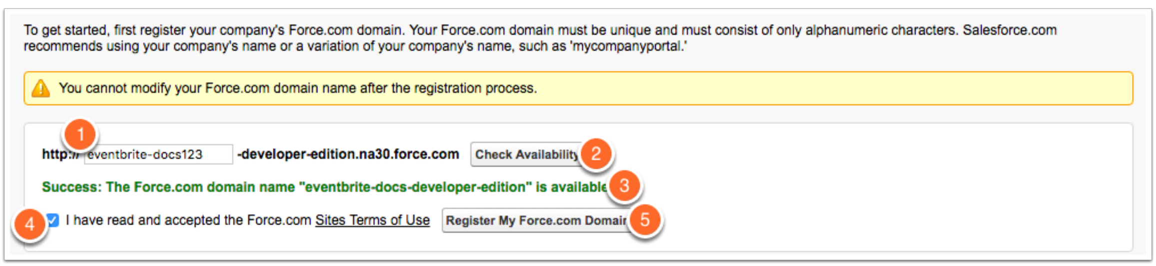
2. Click on the "Check Availability" button.

3. If the domain you entered is available, a green confirmation message will appear.

4. Check the box next to the "Terms of Use."

5. Click on the "Register My Force.com Domain" button.

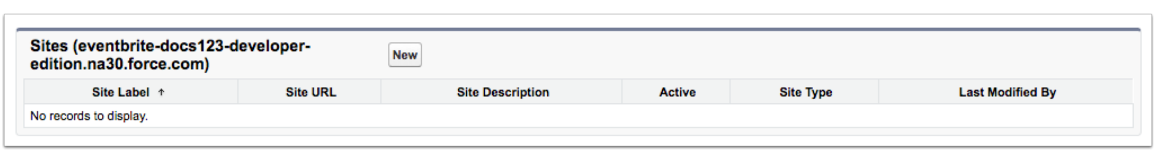
Note: The domain selected will not be able to be changed. If in your production environment, it's not uncommon to use your company name or a derivation of it. If in a sandbox, the naming is less critical as it will only persist as long as the sandbox exists; though, don't use a name you'd like to use in production in your sandbox.



Step 3a: Creating the Site

Once a domain has been established, either previously done or using the prior steps, you can now create a Salesforce Site, dedicated to the purpose of Eventbrite Webhooks.

Click on the "New" button to begin.



Step 3b: Configure Site Settings

Populate the "New Site" settings to match the screenshot below.

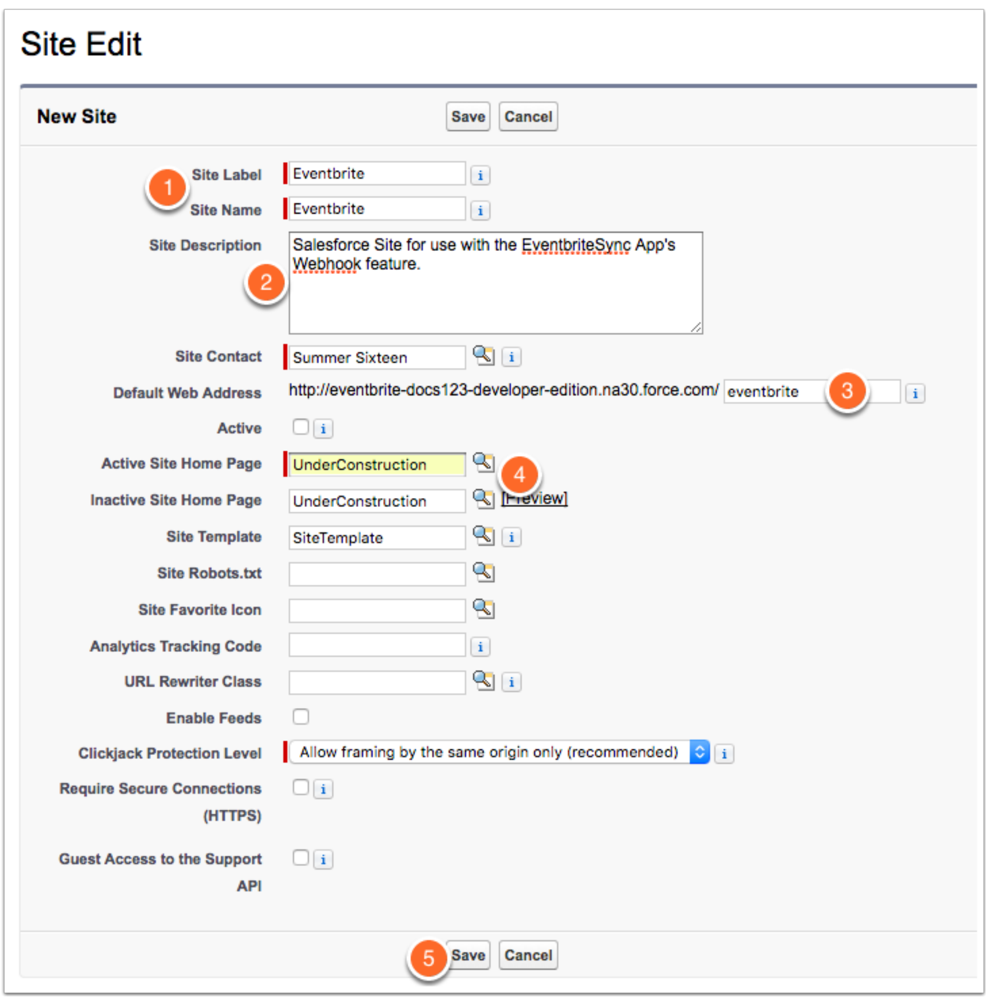
1. Use the name "Eventbrite" for both the "Site Label" and "Site Name."

2. Provide a description for internal use to indicate why this Salesforce Site exists

3. Append "eventbrite" to the end of the "Default Web Address."

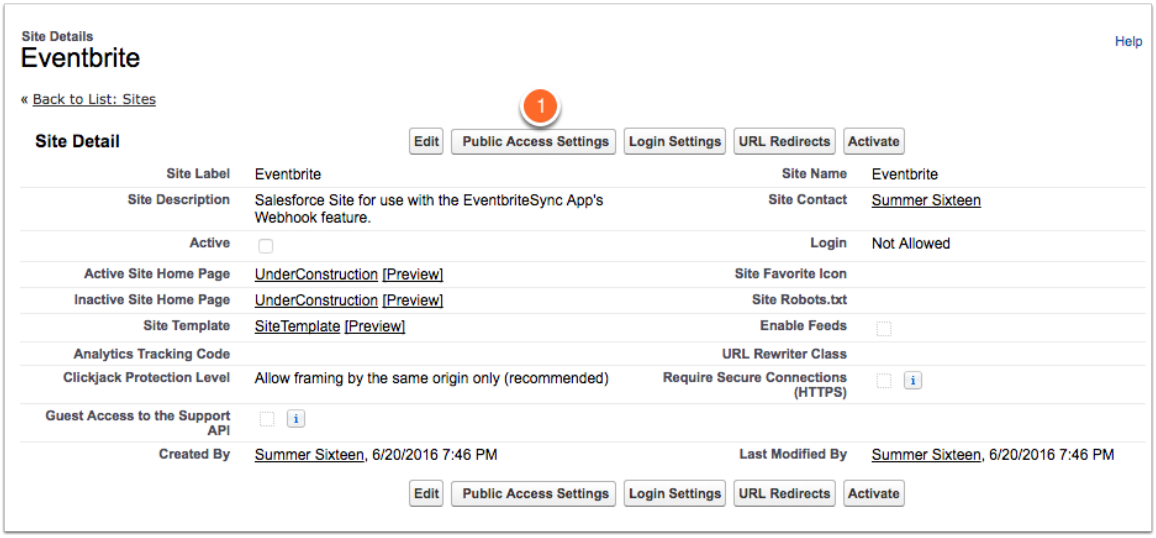
4. Change the "Active Site Home Page" and "Inactive Site Home Page" to "UnderConstruction."

5. Click on the "Save" button.



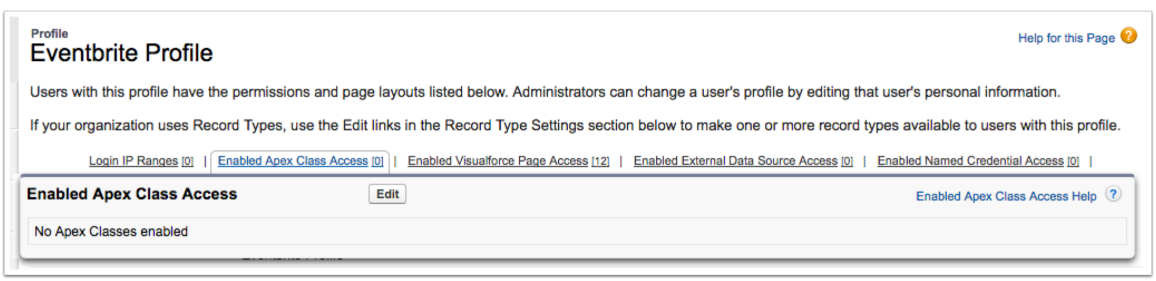
Step 4a: Configure Permissions

After saving, click on "Public Access Settings" button.



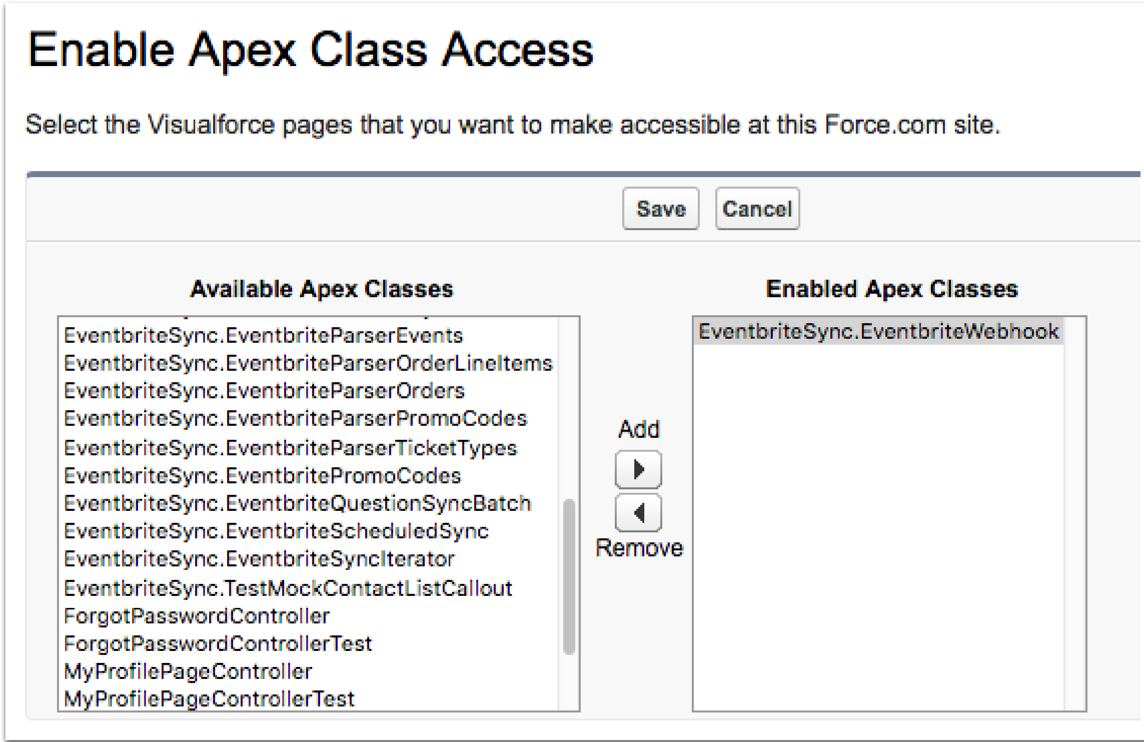
Step 4b: Configure Permissions Cont'd

Under the "Enabled Apex Class Access" link, click on the "Edit" button.



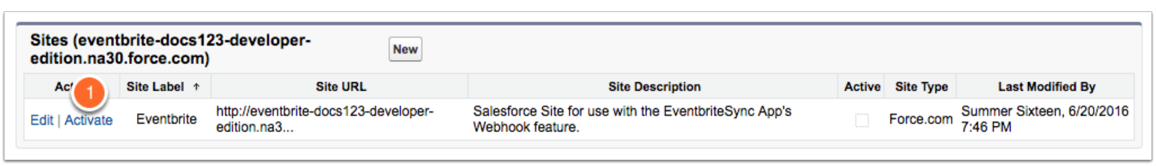
Step 4c: Configure Permissions Cont'd

Find "EventbriteSync.EventbriteWebhook" Apex Class in the list of "Available Apex Classes," click on it to highlight it, click on the "Add" button to move it to the "Enabled Apex Classes" column and then click on the "Save" button.



Step 5: Activate the Site

Navigate back to Setup --> Sites and then click on the "Activate" link next to the new "Eventbrite" Salesforce Site.



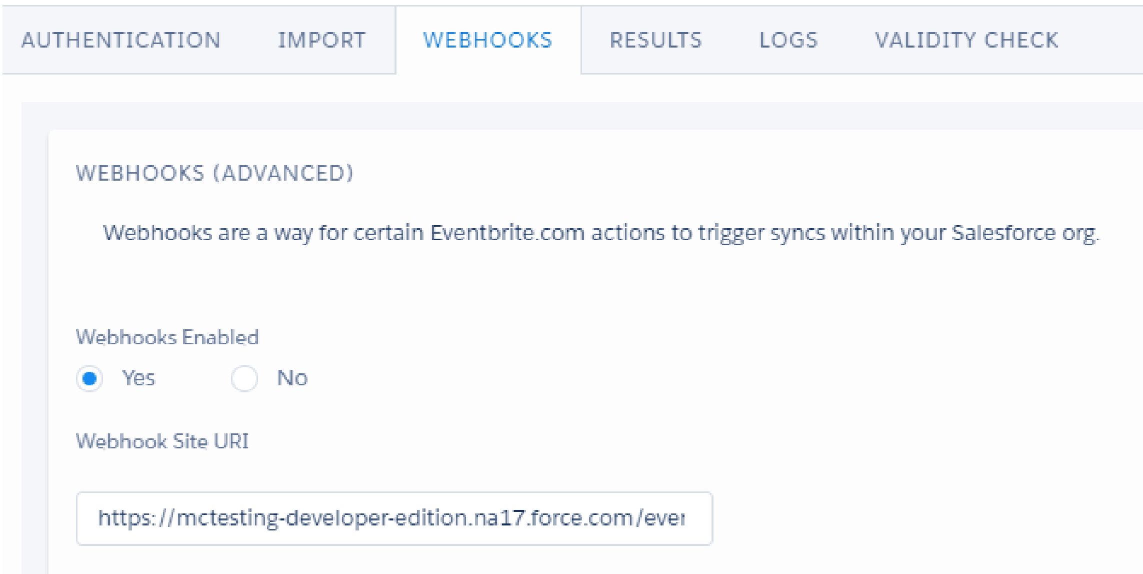
Step 6: Copy the URL

The URL you will need to provide to the Eventbrite configuration is below. Replace <DomainName> with the name of your domain and copy the address to your clipboard.

Address:
https://<DomainName>.secure.force.com/eventbrite/services/apexrest/EventbriteSync

Step 7: Enable Webhooks

Click on the "Eventbrite" Tab, then the "Show Advanced" button, and then paste the address into the "Webhook Site URI" field. Toggle "Webhooks Enabled" to "Yes" and then click on the "Save" button.

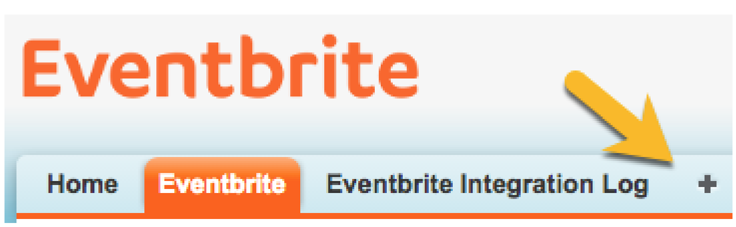


Package Upgrades

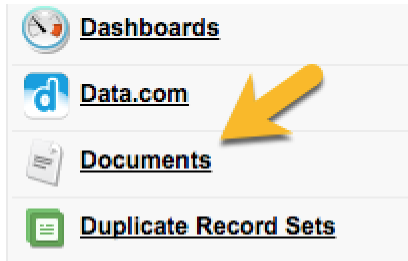
App Settings Backup

Whenever you upgrade from one version of the package to the next, some of your App's configuration settings will be stored in .csv files, located in an "Eventbrite" folder within the "Documents" Tab.

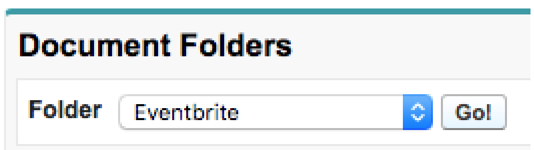
1) Navigate to the "All Tabs" page



2) Click on the “Documents” Tab



3) Choose “Eventbrite” from the dropdown and click on the “Go” button to access the Eventbrite documents.



4) Here you will find your backed up settings for reference.

Appendix

Required Permissions

The EventbriteSync app works with many custom objects and fields (included in the App's managed package) as well as standard, out-of-the box, Salesforce objects, including standard and custom fields on those objects.

Required permissions can vary depending on your usage and configuration of the app.

In general:

- User Level Permissions
  - If using Campaigns as a Target sObject, the "Marketing User" checkbox permissions on the User record
- Object Level Permissions (CRUD)
  - All "Eventbrite <object> (Import)" Custom Objects - Create, Read, Update, and Delete
  - All Salesforce objects specified as Target sObjects on the "Mapping Configuration" screen - Create, Read, and Update
- Field Level Security (FLS)
  - All fields on the "Eventbrite <object> (Import)" Custom Objects should have both "Read" and "Edit" field level permissions
  - All mapped fields (Simple, Lookup, and Static target fields) on the "Mapping Configuration" screen - "Read" and "Edit"

Duplication Management

The Eventbrite Sync app uses a few different mechanisms for identifying existing records in your Salesforce org, prior to creating new records.

Unique Ids - Most Objects

For most objects, this is done through an "Eventbrite Id" field that is used as a unique identifier by the app to determine which records exist. During an import process, for Events, Orders, Ticket Types, Order Line Items, Questions, Barcodes, and Promo Codes, these Ids are used and searched for.

- If the app identifies existing records with the same Ids as the data being imported, the existing records are updated (see the "Allow Overwrite" option in field mappings).

- If the app is unable to locate existing records with the same Ids, then new records will be created.

Unique Ids - Person Types

For the identification of "Person Types," the data from Eventbrite that would result in the creation of person records like Leads, Contacts, or

Person Accounts (where enabled), matching of existing records is handled differently. Take a moment to review "[Person Object Types - Defined]" and subsequent "Matching Existing" and "[Matching Priority]" sections.

Existing records for Leads, Contacts, and Person Accounts is done by matching the First Name, Last Name, and Email addresses exactly. We've found that in many cases, individuals placing Event orders often use the same email address for all of their attendees. Matching solely on the email address leads to the same record being repeatedly, overwriting the data of each attendee. Matching on First Name, Last Name, and Email address allows this to be avoided and allows for you to account for all of your Events' Orders' attendees.

However, it's not a perfect strategy as the Eventbrite.com order form is free-form text input, which means your customers are free to enter any names, nicknames, email addresses, typos, etc.

Prevent Duplication

The best way to prevent duplication is to apply your desired configurations in a sandbox environment, preferably a full sandbox with existing data that mirrors your production environment, and let it run for a few days. Check for duplicated records before attempting your configuration strategy in Production. Testing and validating the solution in a sandbox is much more efficient and effective than trying to clean up duplicated data.

Eventbrite's support is unable to offer any additional guidance should your configuration's result in duplicate or incorrectly updated data.

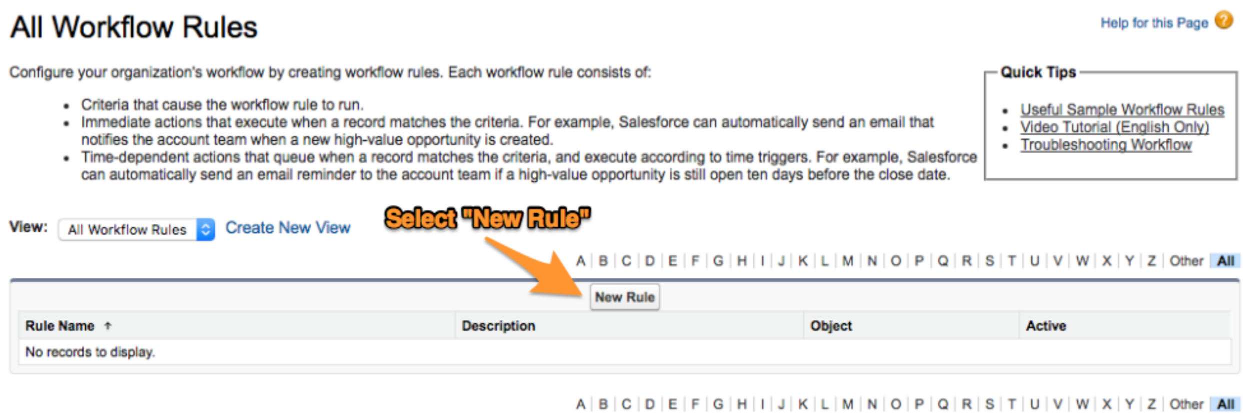
Workflow Example: Record Naming Conventions

It may be desirable to use a custom naming convention for some of the records generated by the EventbriteSync App. For example, by default when Opportunities are used as the Target objects for Eventbrite Orders, the Opportunity names are set using the Buyer's Name. The below example will show how to override the default naming conventions using Workflows and Field Updates. Although the example covers Opportunities, the same idea can be used to override any object created/updated.

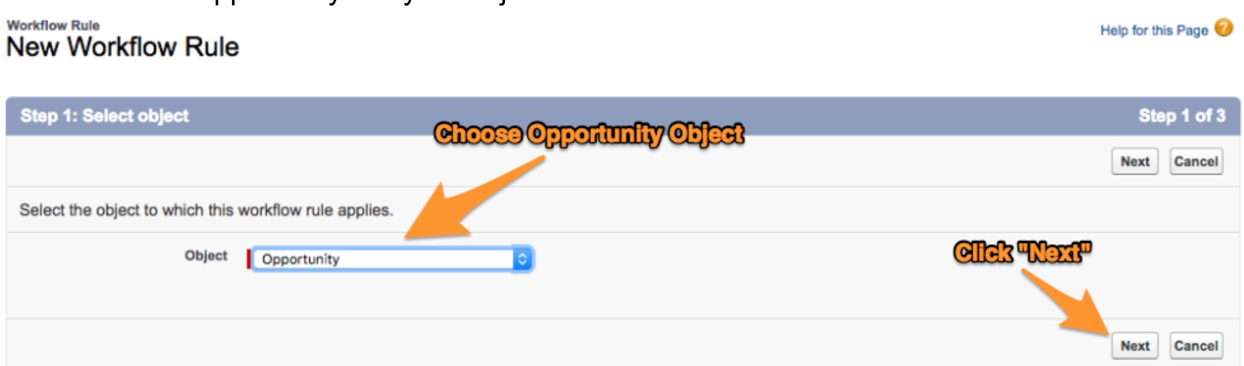
In order to customize the naming convention of Opportunities created by Eventbrite imports, a workflow rule can be created to handle naming conventions for records, below are instructions on how to create a workflow rule to handle either a naming convention containing either static text, fields from the Opportunity record, or fields from a Parent record.

First, create the rule:

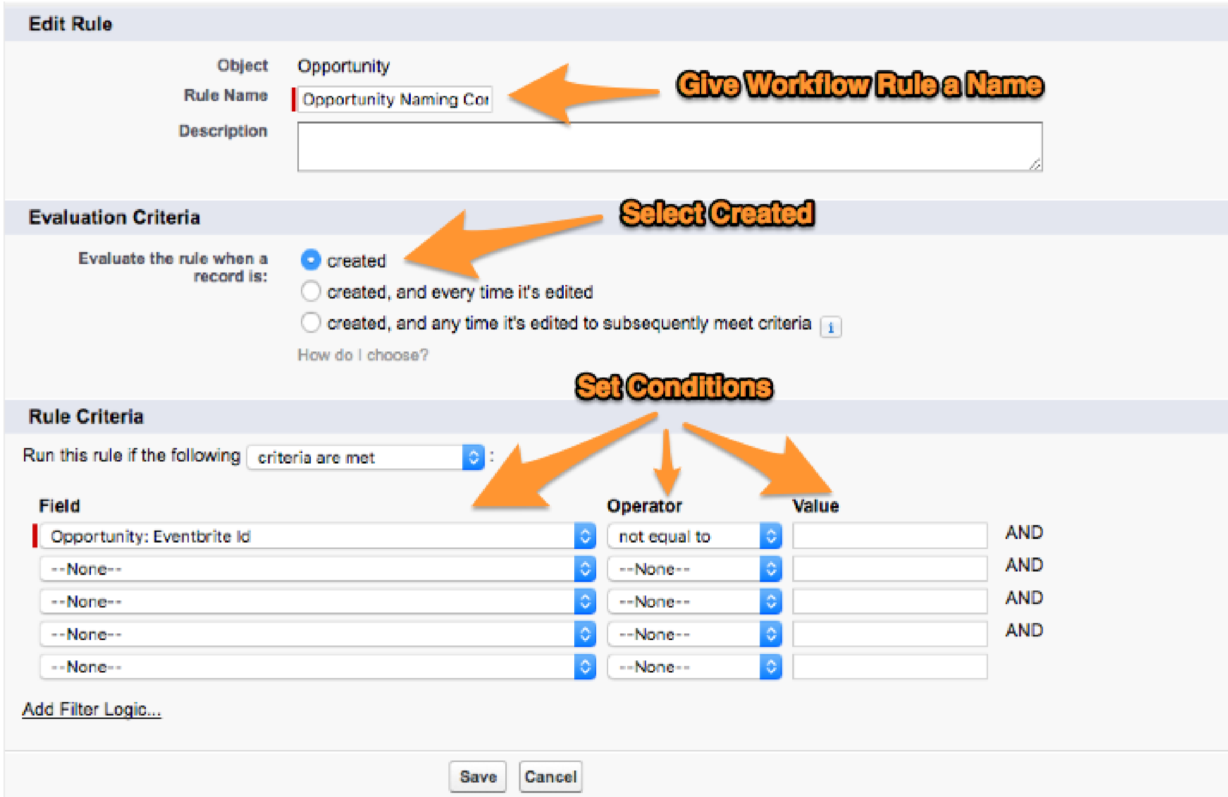
- Navigate to “Setup”
- “App Setup” -> “Create” -> “Workflow & Approvals” -> Click on “Workflow Rules”
- When the “All Workflow Rules” page is visible, click the “New Rule” button (or click the “Edit” link next to a pre-existing workflow rule if you’ve already created one and are changing conditions or the naming formula)



- Select “Opportunity” for your object and click “Next”



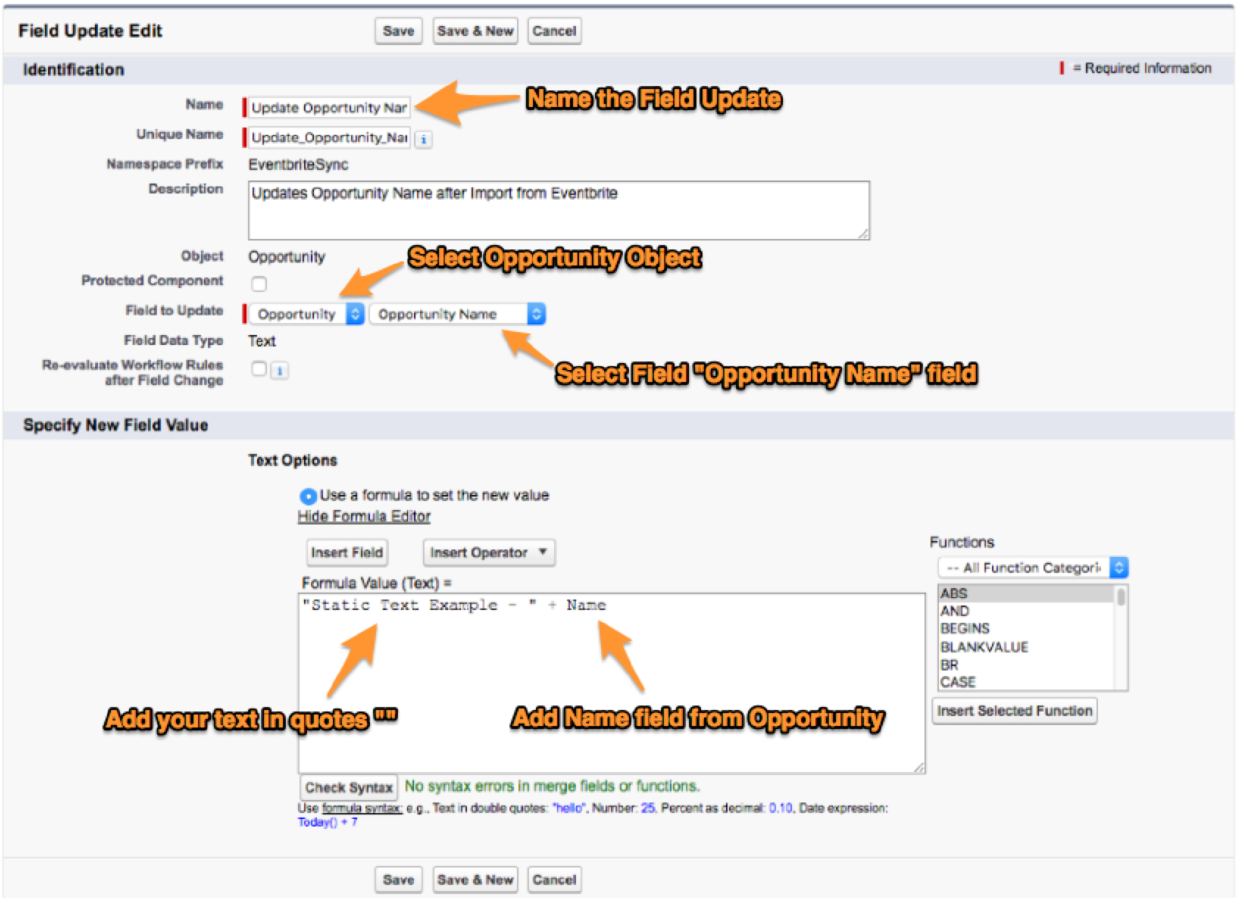
- On the rule creation page, in the “Edit Rule” section fill in the “Rule Name” field with a name for the workflow rule
- In the “Evaluation Criteria” section, you must choose “Created” or “Created, and any time it’s edited to subsequently meet criteria” to ensure that the workflow rule does not double name the Opportunity
- In the “Rule Criteria” section, “Opportunity: Eventbrite Id” must be a field chosen, with “not equal to” as the operator, and blank as the value, this ensures that the rule only runs on records where the Eventbrite Id is not blank (hence, only records imported by Eventbrite)
- Click Save



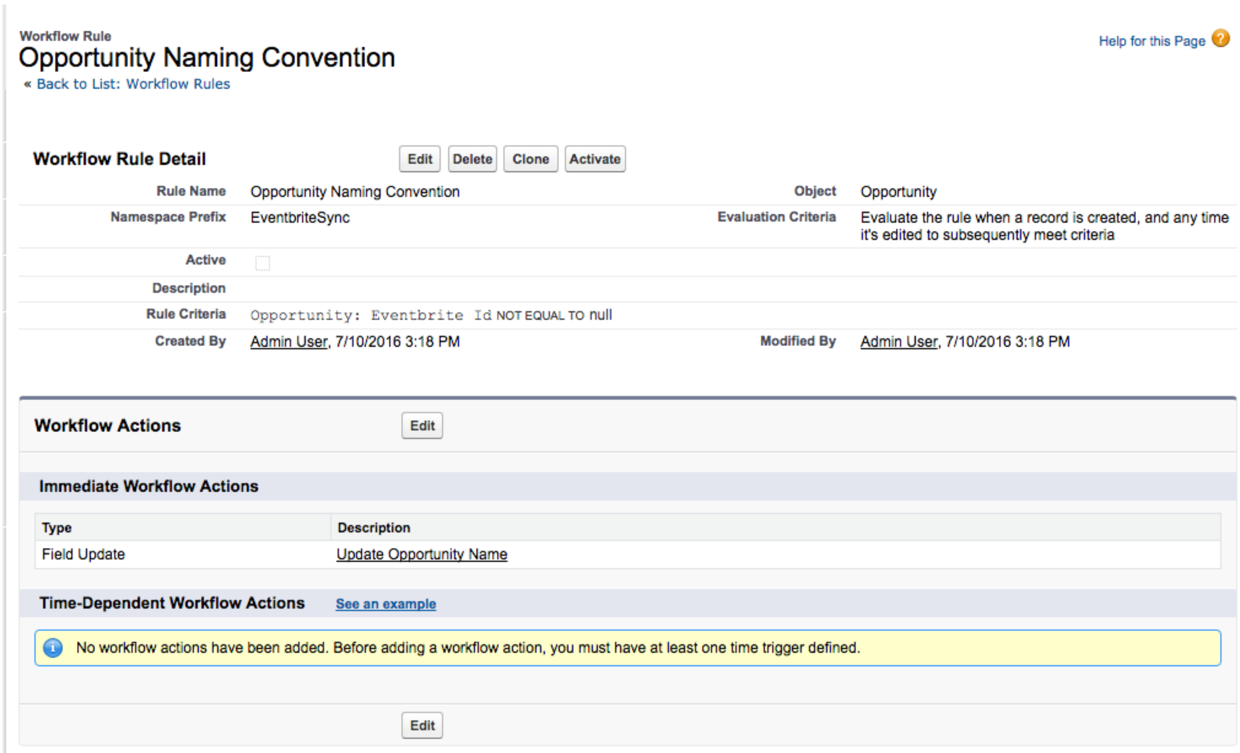
- Add a workflow action by clicking the "Add Workflow Action" dropdown
- Choose the "New Field Update" option

- In the "Identification" section, give the Field Update a descriptive name
- In the field to Update dropdowns choose the "Opportunity" object and the "Opportunity Name" field
- In the "Specify New Field Value" section, expand the formula editor, and enter a variation of the following formula:

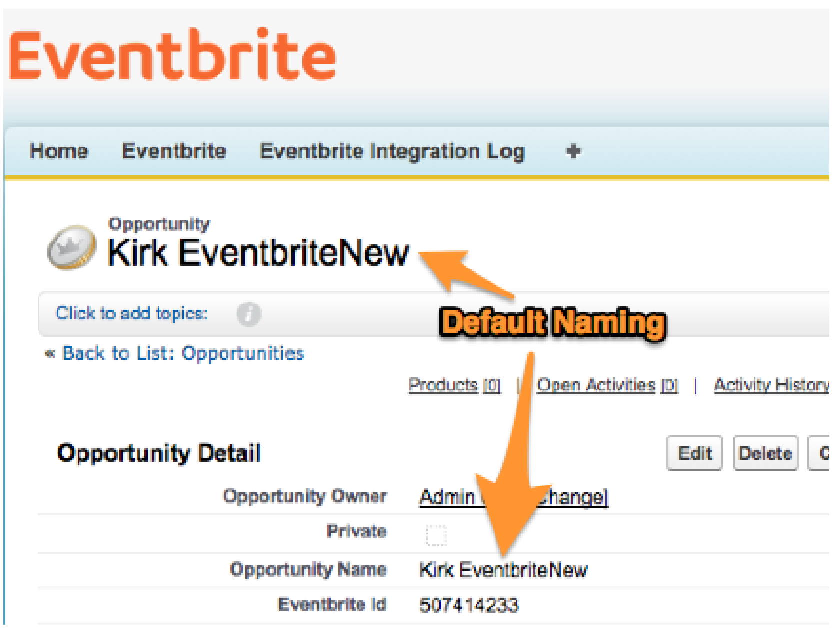
    - “YOUR STATIC TEXT” + “ - “ + Name
- Click Save



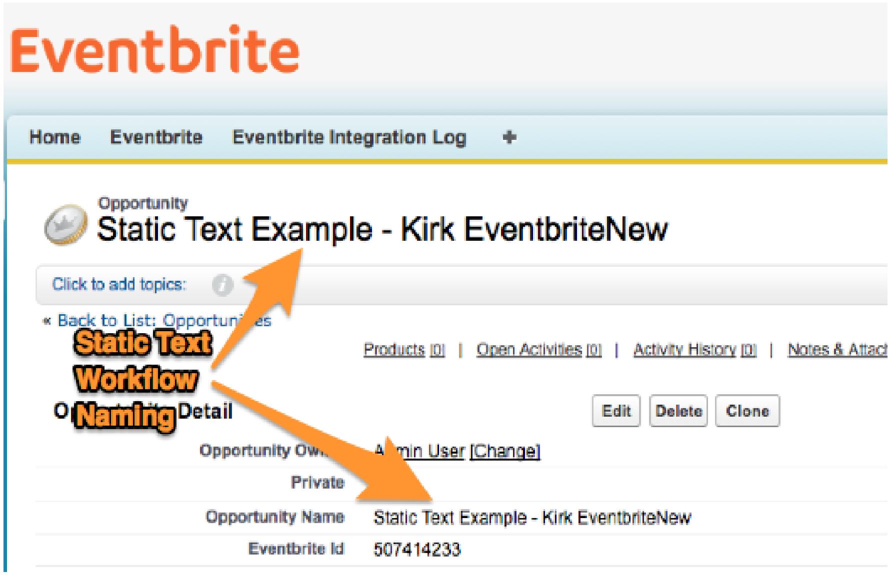
- Review your workflow rule, and click the “Activate” button to activate it



- The Default naming of the Opportunity object looks like this:

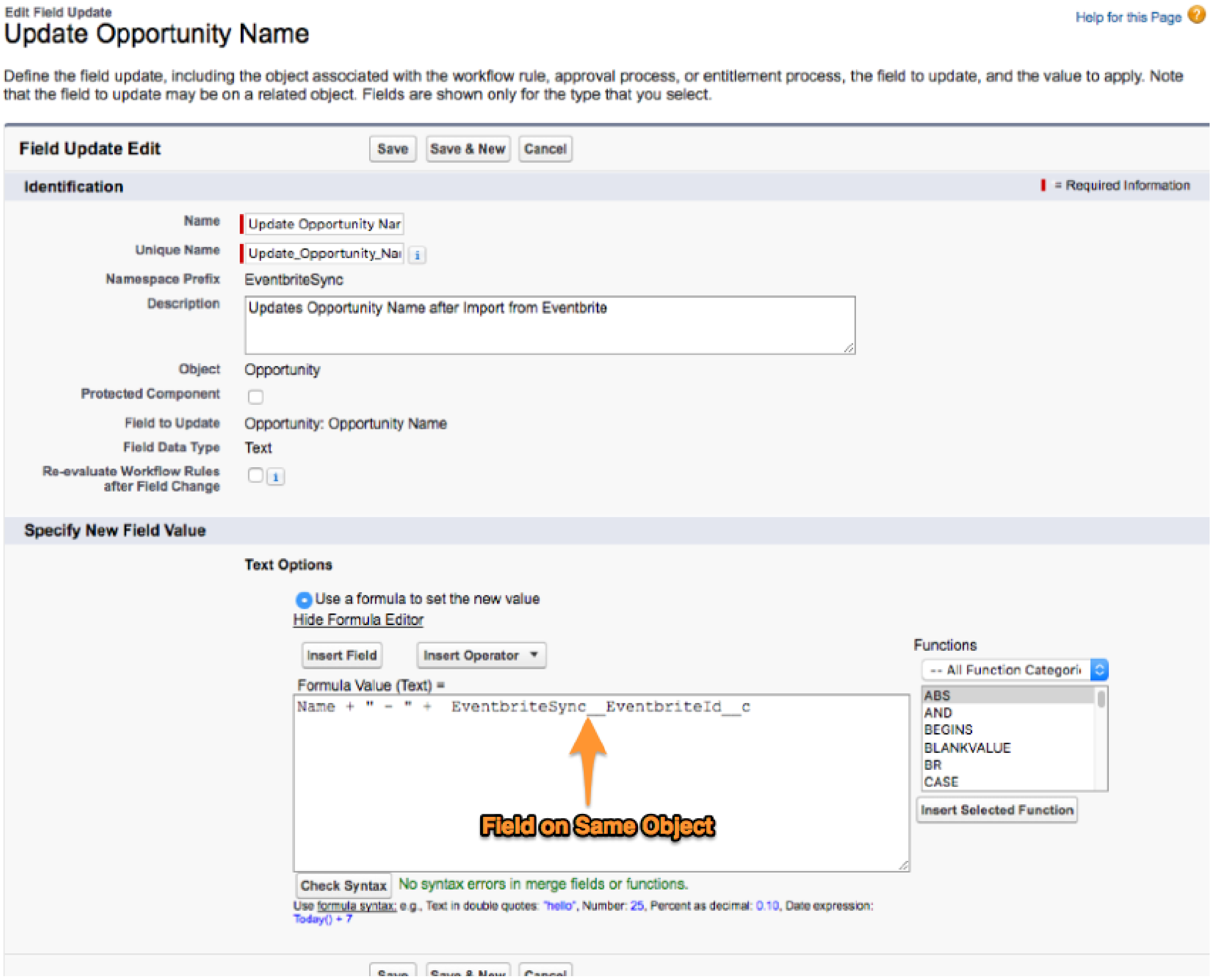


- The new rule with the static text pattern will change the name to appear like this:

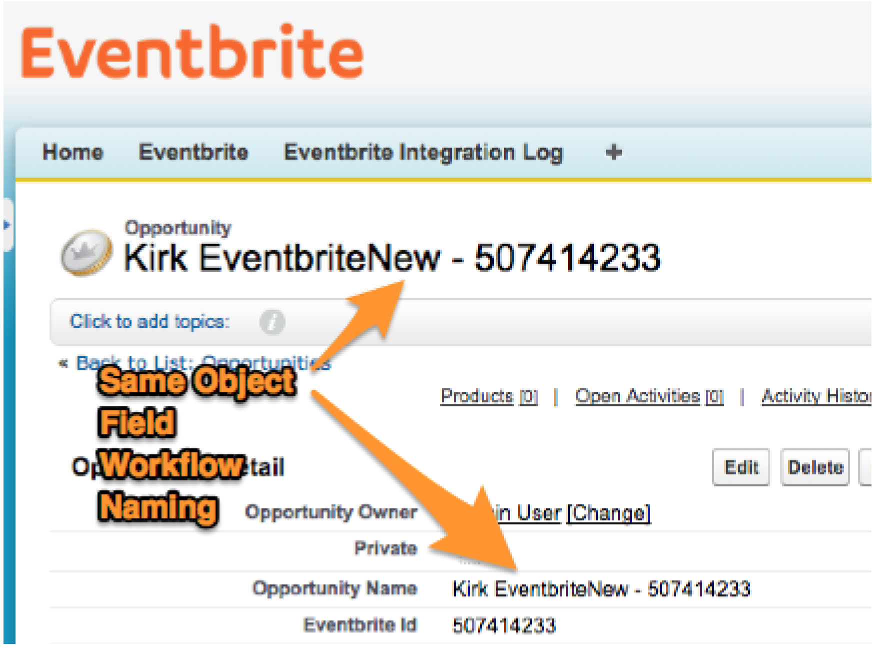


- If you'd like to use another field on the Opportunity object in the naming convention, find the workflow rule you created, and edit the field update

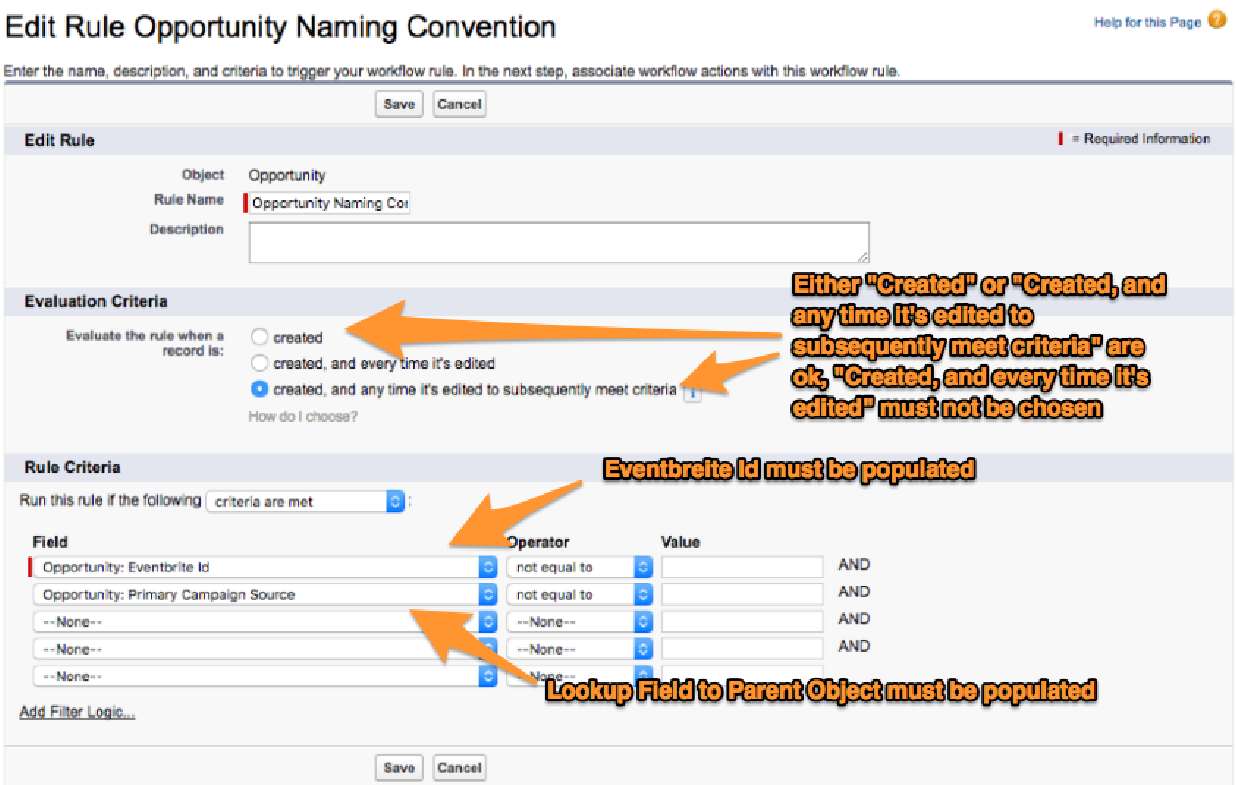
- In the “Specify New Field Value” section, expand the formula editor, and enter a variation of the following formula:
    - Name + “ - “ + OpportuinityFIeld__c
    - The Eventbrite Id field is used in the example below:



- The rule with the same object field pattern will change the name to appear like this:

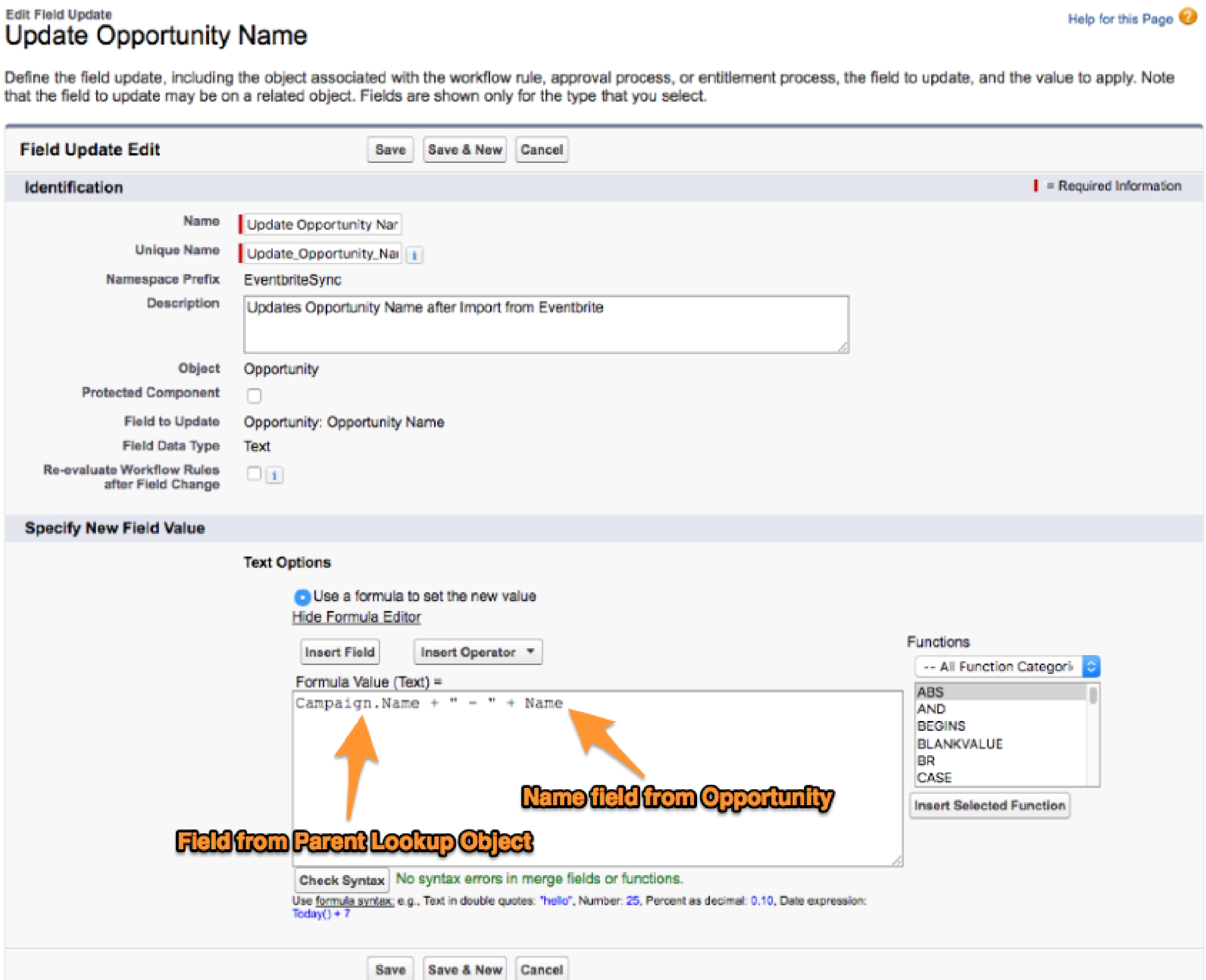


- In the case of using a field from a parent object, the workflow rule conditions must be edited to add a condition
    - The parent object lookup field must not be blank

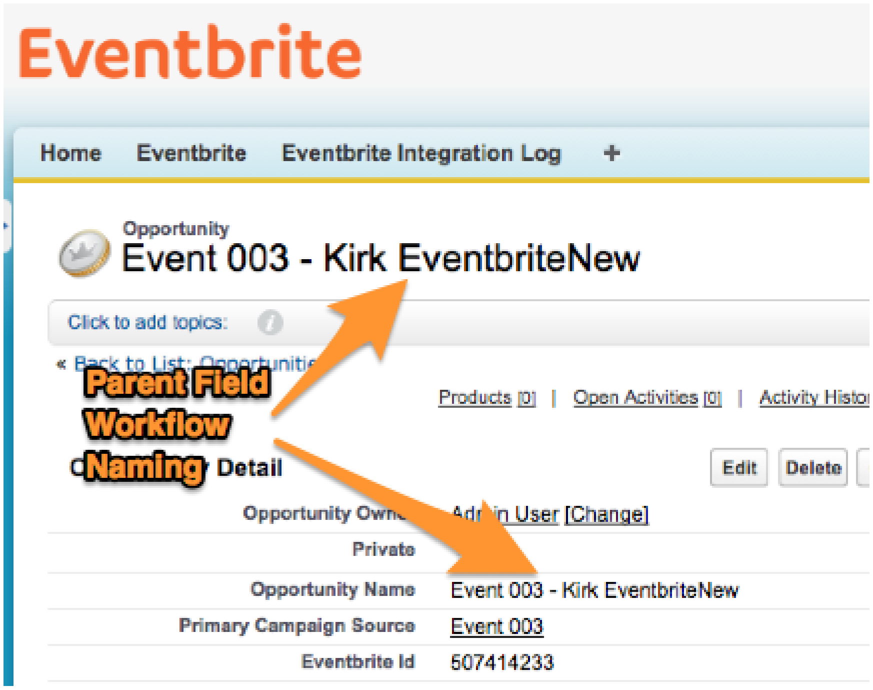


- Now edit the field update

- In the “Specify New Field Value” section, expand the formula editor, and enter a variation of the following formula:
  - ParentObject__r.Field__c + “ - “ + Name
  - The Campaign.Name field is used in the example below:

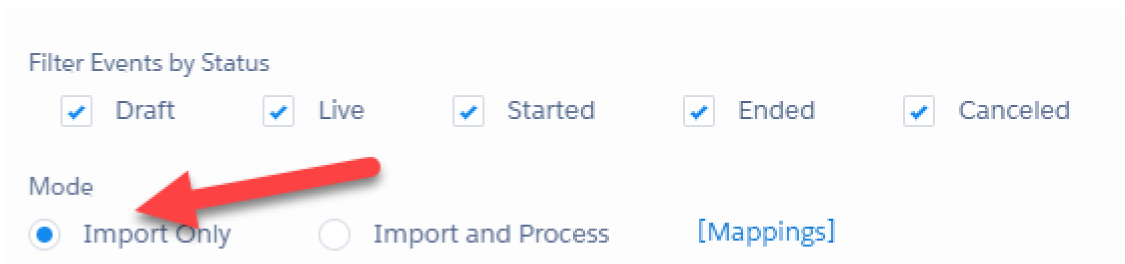


- The rule with the parent field pattern will change the name to appear like this:



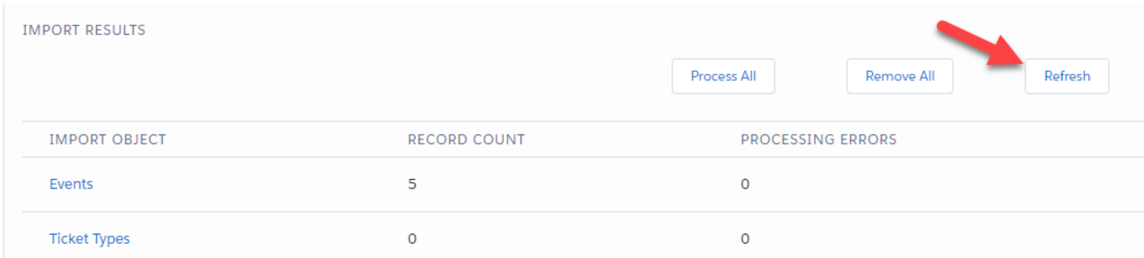
Object/Field Mapping Testing and Verification Procedure

1) Turn on "Import Only" mode by going to the "Eventbrite" Tab and selecting it as shown.



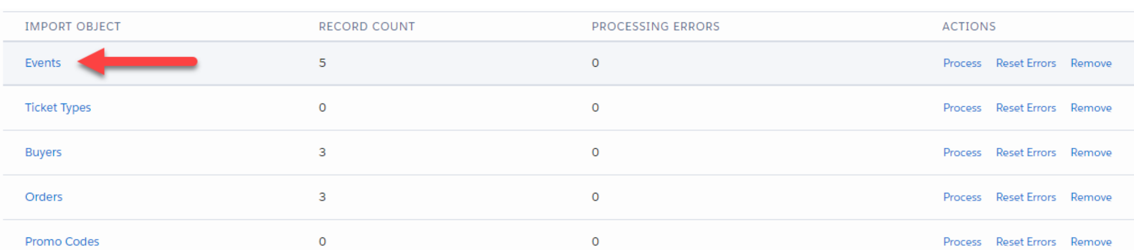
2) Obtain the Eventbrite Event Id from a single Event (from the Eventbrite.com URL for that Event) and paste it into the "Single Event Id" box. We'll import records for only this event, without processing them to map them to your Salesforce objects of choice, yet.

3) Click on the "Start Import" button at the bottom of the page.
4) Allow the job to run. You can check on the status of the job by clicking the "Refresh" button within the "Results" tab

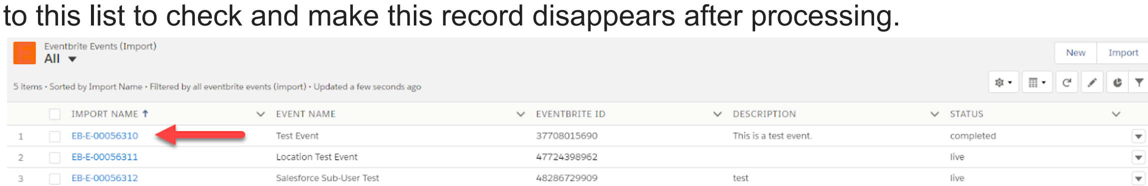


5) Once the import has completed, re-enable the "Import and Process" option that was disabled in Step 1

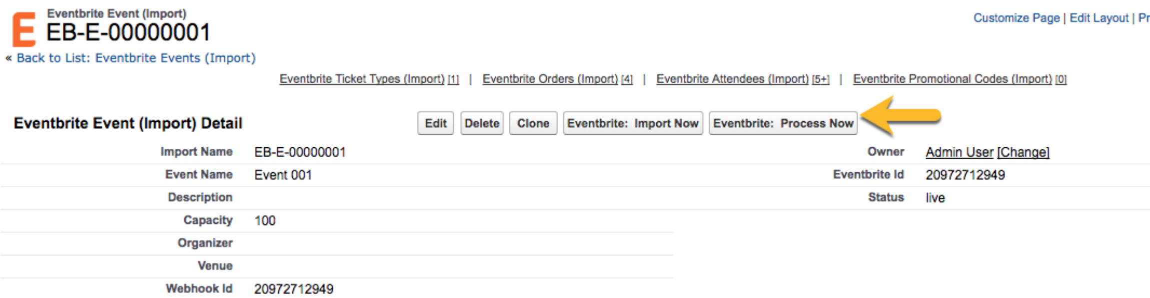
6) Now that you have Import records that haven't been processed, you can test your mappings by manually processing individual records for each Entity type first, then moving on to processing all of the import records for each Entity type. Work through the list of "Import Results" starting with "Events" and working your way down through "Answers." To start testing a single record, click on the "Events" link.



7) This will take you to a List View of pending "Event" Import records. Click on the "Import Name" of the first record. Take note of the "Eventbrite Id" as you'll be returning to this list to check and make this record disappears after processing.



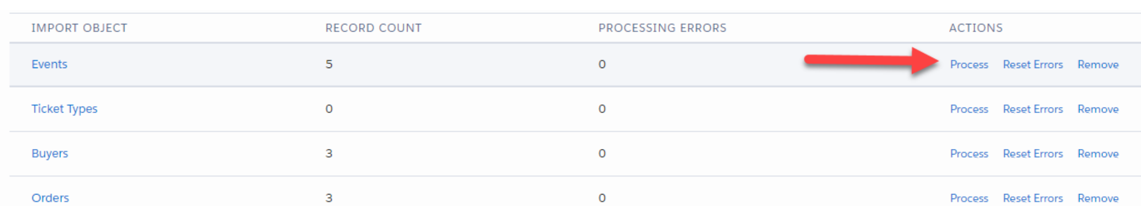
8) On that record's page, click on the "Eventbrite: Process Now" button.



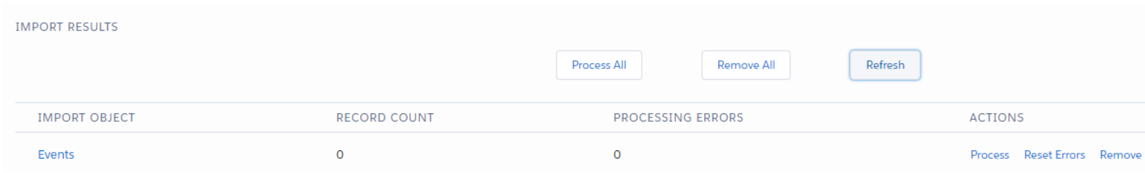
9) At this point, after a few seconds the screen will refresh to the List View of Import records where you should confirm that the record processed no longer exists OR you'll receive a pop-up alert indicating an error was encountered. If you receive the error message, review its text for suggestions around what the issue is. Issues can range from things like missing required fields, validation rules, invalid/stale mappings (fields being renamed or deleted after being mapped in the app), etc.

10) If the record disappeared and you didn't encounter any issues, you should be able to search for that record amongst your other Salesforce records. The above Event was mapped to the Salesforce Campaign object.

11) The next step would be to perform processing for all Events, using the "Process" link on the "Events" row of the "Import Results" table. This link will process all of the pending records on that row.



12) Again, use the "Refresh" button to keep track of processing. You should see the "Record Count" column decrease and any issues encountered will increase the "Processing Errors" column. If you notice any issues, click on the "Events" link again to go to the List View of records, change thew View dropdown to "Processing Errors" to review the messages. Also, review the "Eventbrite Integration Log" Tab for any additional issues.



Attendee Question/Answer Mapping Through Process Builder

Overview

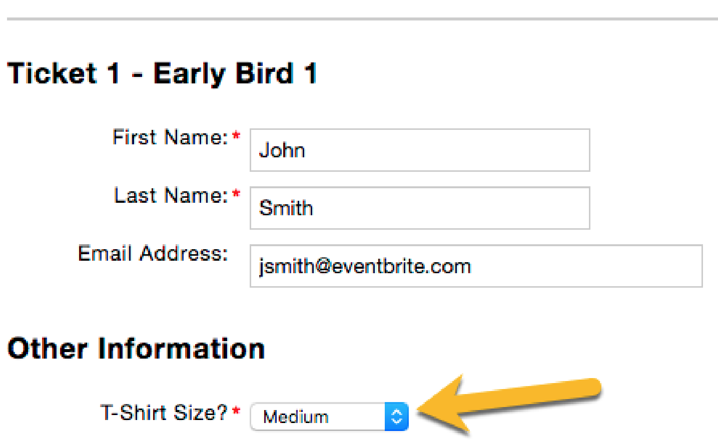
Depending on your business use case, you may find it necessary to use the question responses obtained through an event's order form to update various records in Salesforce.

Notes:

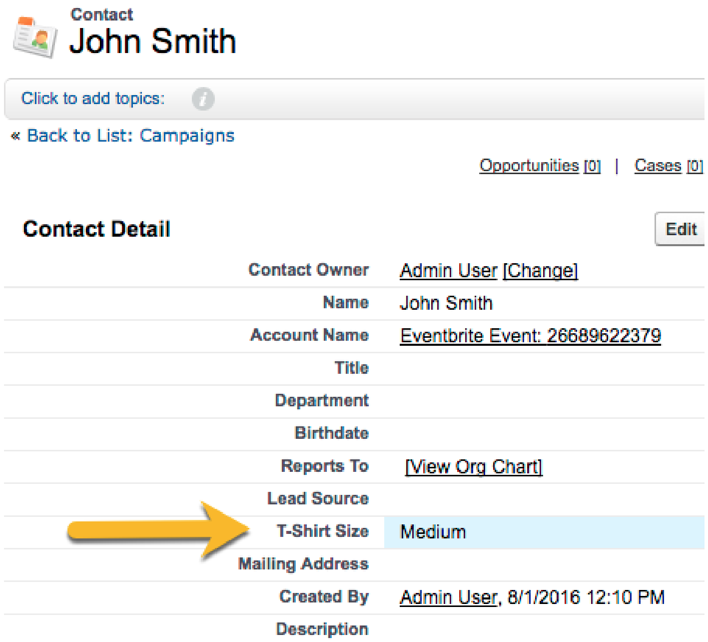
- Be sure that you have [created the field]() on the Contact Object that should end up with the Eventbrite Custom Question Answer.
- Keep in mind that one attendee may appear in one or more orders within an event and event multiple orders across multiple events. As you're creating the necessary field updates, detailed below, keep this in mind as it may be possible to map multiple questions to the same field, potentially creating a scenario in which the response from an attendee for one order is overwritten by another.

Sample Scenario

At our event, we'll handing out t-shirts to all attendees. While registering for the event, all order buyers are prompted for their attendee's t-shirt size:

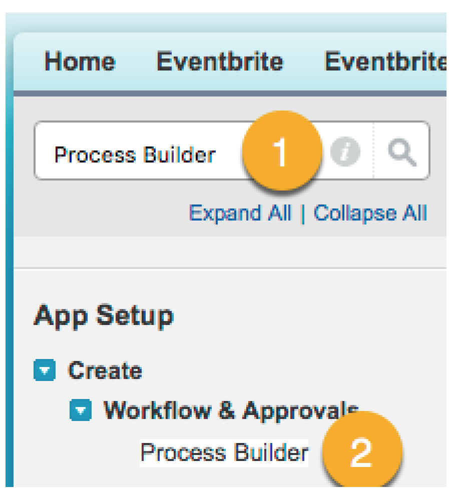


Assuming the default mapping configuration (Attendees → Contacts), we'd like to populate the Contact's "T-Shirt Size" field with the response provided.



Using Process Builder

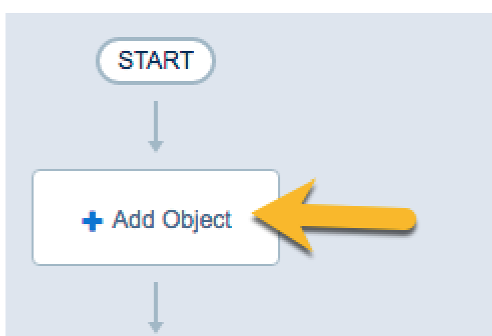
1. Within Salesforce, under the “Setup” menu, use the quick-find box to search for “Process Builder” and then click on the “Process Builder” link under “Workflow & Approvals”



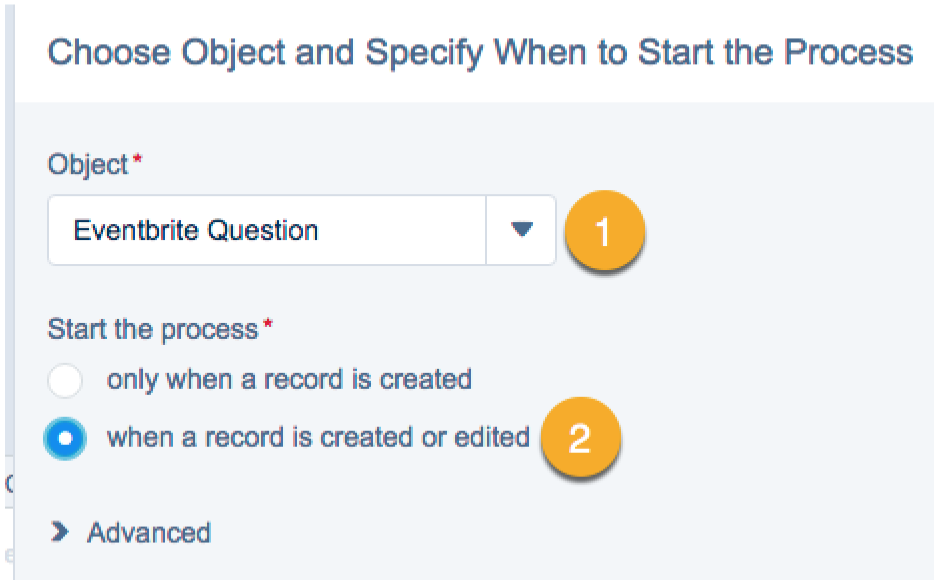
2. Click on the “New” button in the upper-right hand corner

3. Provide a “Process Name” and “Description” for the new Process and then click on the “Save” button. The process configured in the following steps will allow you to map all of the necessary questions for a specific event, not just the t-shirt question.

4. Click on the “+ Add Object” block

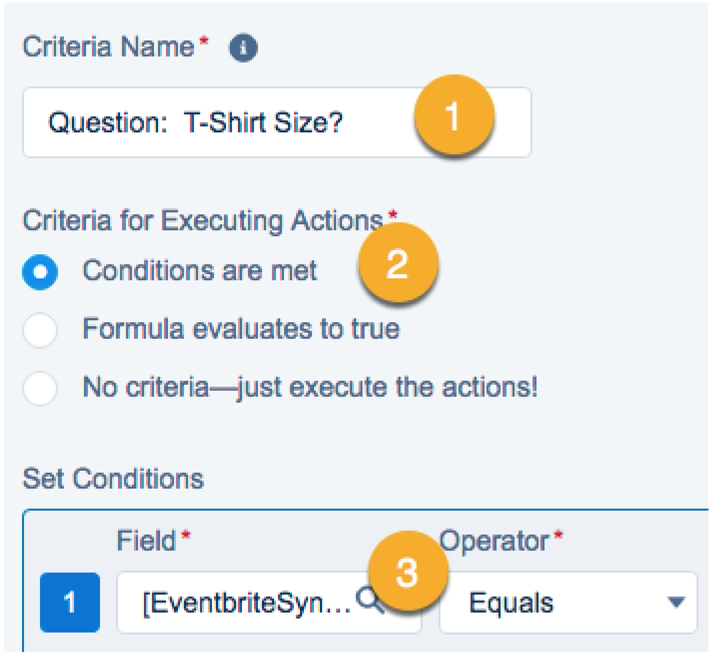


5. Choose “Eventbrite Question” for the “Object” and then also select the “when a record is created or edited” radio option. Then click on the blue “Save” button at the bottom.

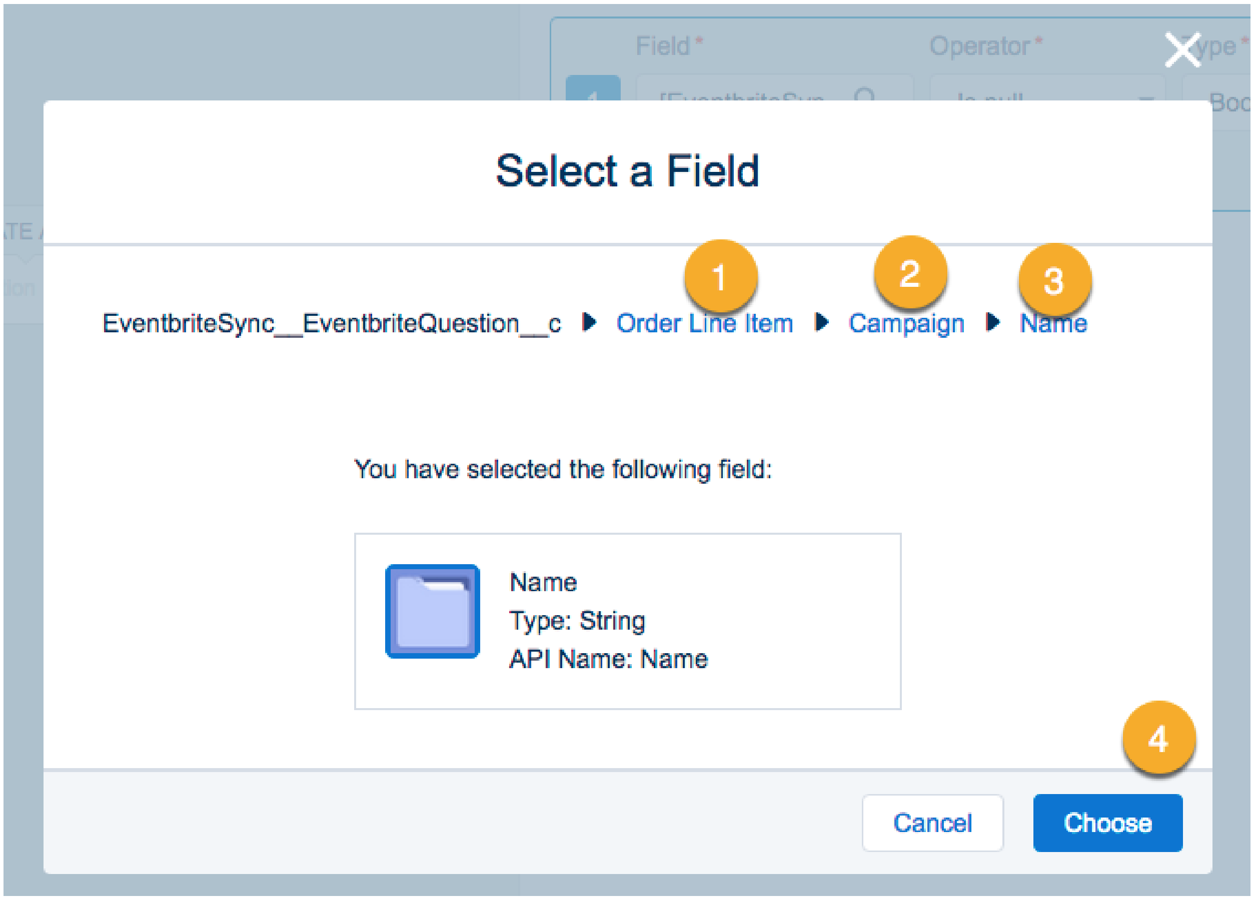


6. Click on the “+ Add Criteria” block

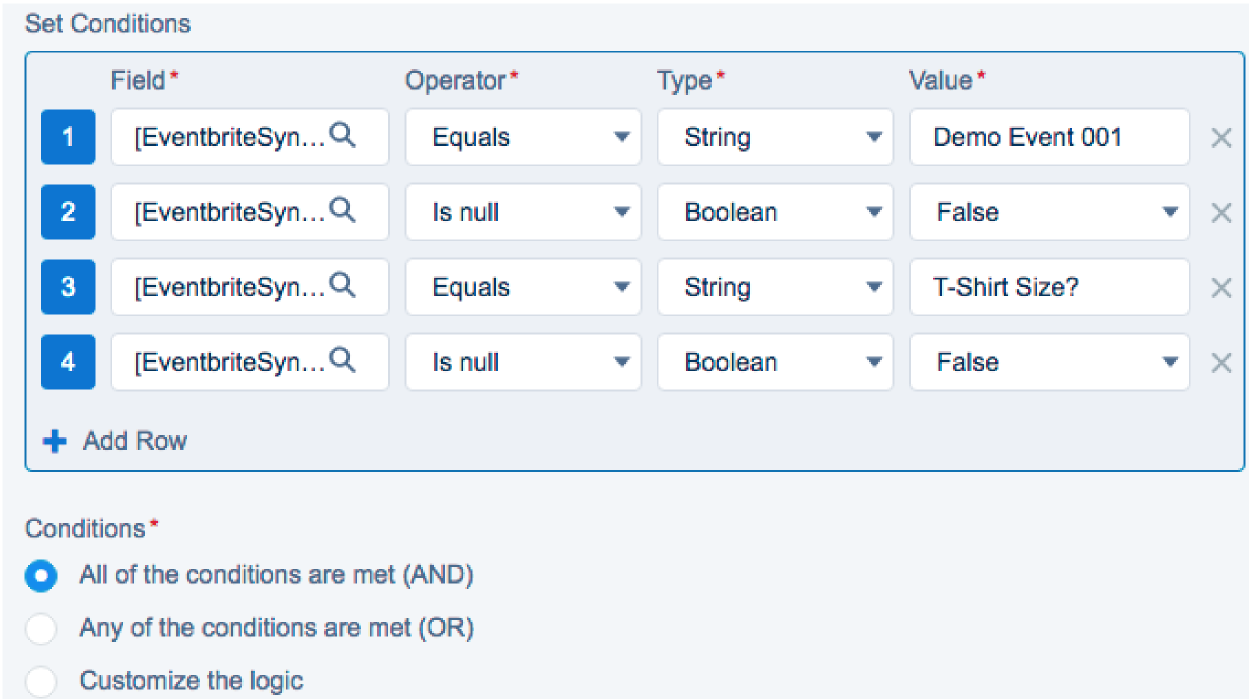
7. Provide a “Criteria Name,” select the “Conditions are met” radio option, and then click on the magnifying lense within the 1st “Field” block:



8. Navigate to select “Order Line Item →” then “Campaign →” and then “Name.” Then click on the blue “Choose” button.



9. Set the “Operator” to “Equals,” the “Type” to “String” and the “Value” to the name of your Event.
10. Add 3 additional sets of criteria as follows:
    a. Is Related to a Contact (make sure there is a related Contact to update)
        i. Field: EventbriteSync__EventbriteQuestion__c → Order Line Item → EventbriteSync__AttendeeContact__c
        ii. Operator: Is null
        iii. Type: Boolean
        iv. Value: False
    b. Is the T-Shirt Question
        i. Field: EventbriteSync__EventbriteQuestion__c → Question
        ii. Operator: Equals
        iii. Type: String
        iv. Value: T-Shirt Size?
    c. Has an answer
        i. Field: EventbriteSync__EventbriteQuestion__c → Answer
        ii. Operator: Is null
        iii. Type: Boolean
        iv. Value: False



Important NOTE: If you are referencing a field on a parent record, make sure to have a criterion that checks to make sure a parent record exists first.

IE: Instead of having a criteria like this:

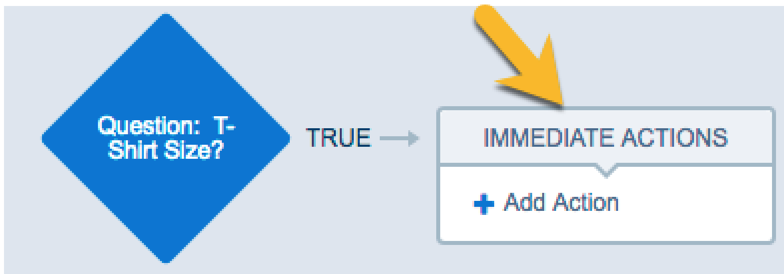
1) **OrderLineItem__r.Campaign.Name - Equals - String - 'My Test Event'**

Make sure to precede the related record field criterion with a criterion to check if there is a related record.

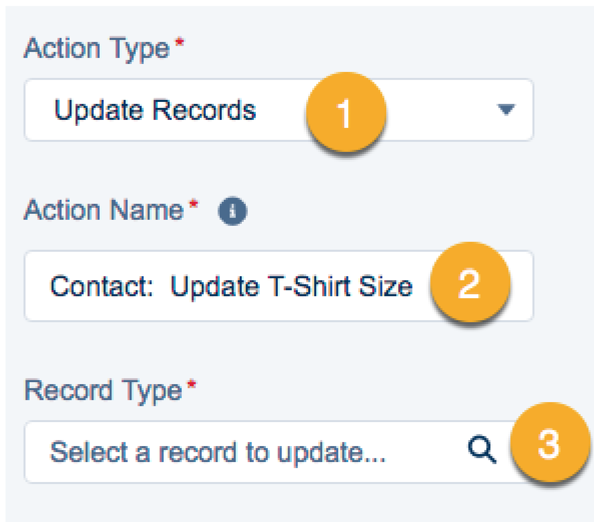
1) **OrderLineItem__r.Campaign - Is null - Boolean - False**
2) **OrderLineItem__r.Campaign.Name - Equals - String - 'My Test Event'**

Failing to do so can result in processing exceptions, resulting from an issue with how the Process Builder evaluates a flow's conditions.

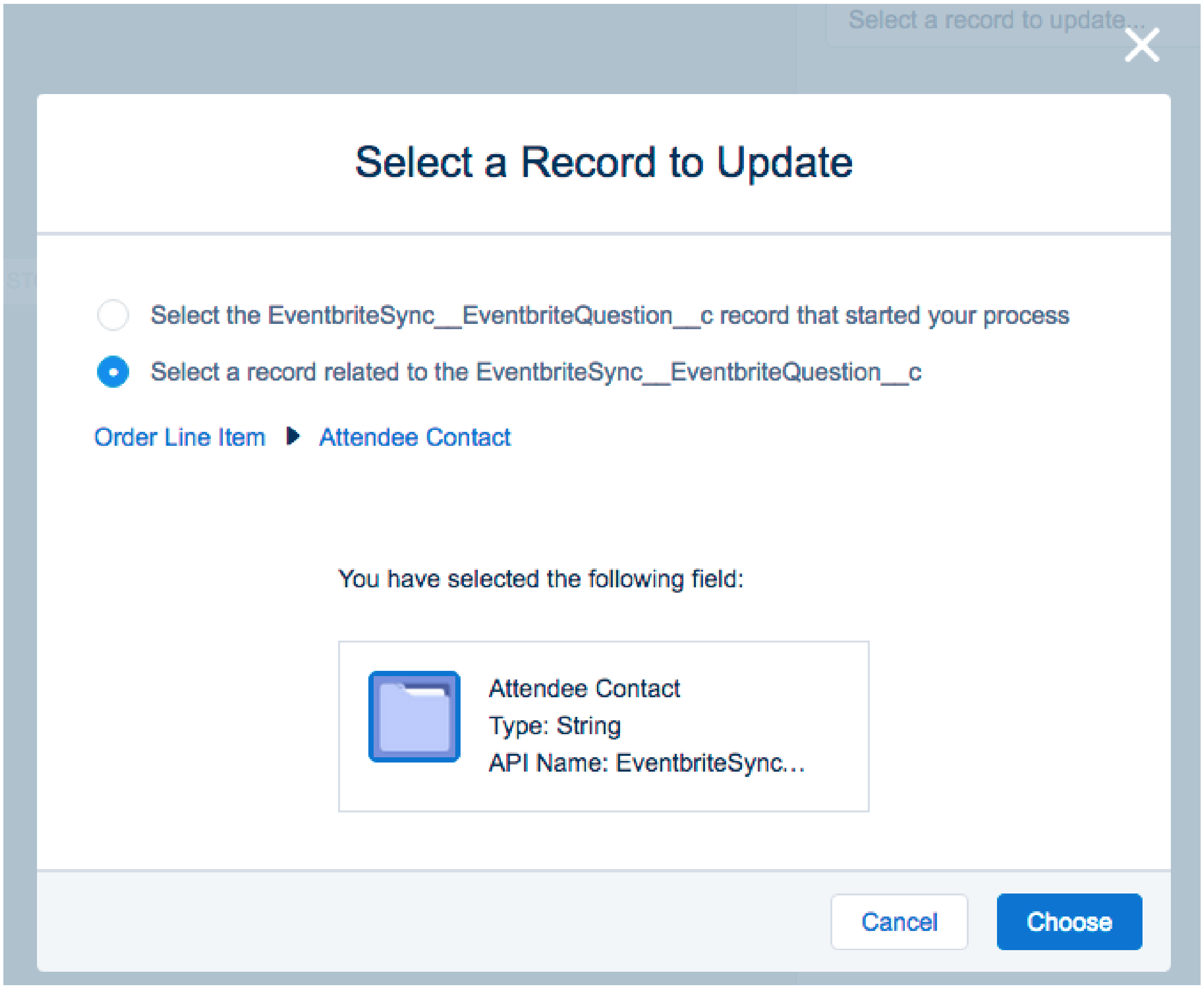
11. Ensure that the "All of the conditions are met (AND)" radio is selected and then click on the blue "Save" button at the bottom.
12. Click on the "+Add Action" block



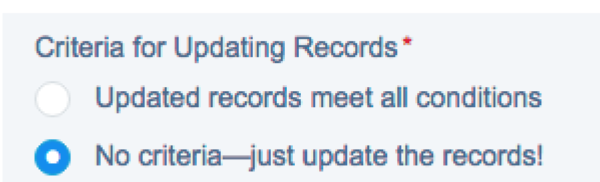
13. Choose "Update Records" as the "Action Type," then provide an "Action Name," and then finally click on the magnifying lens in the "Record Type" box.



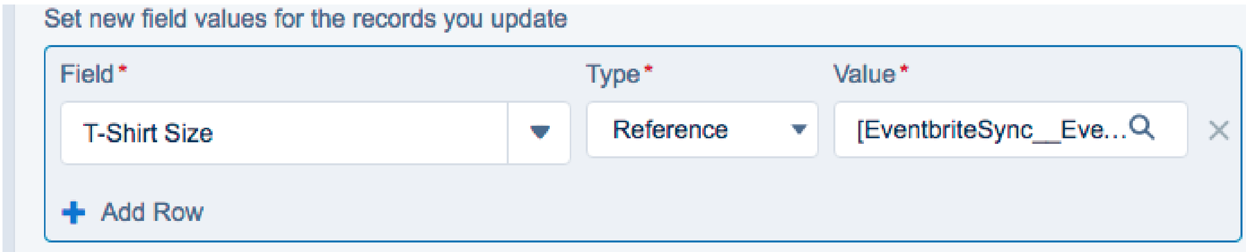
14. Select the "Select a record related to the EventbriteSync__EventbriteQuestion__c" radio option and then choose "Order Line Item→ " followed by "Attendee Contact" (Note: There is both a relational "Attendee Contact→ " and a field "Attendee Contact." You just want to select the field). Click on the blue "Choose" button.



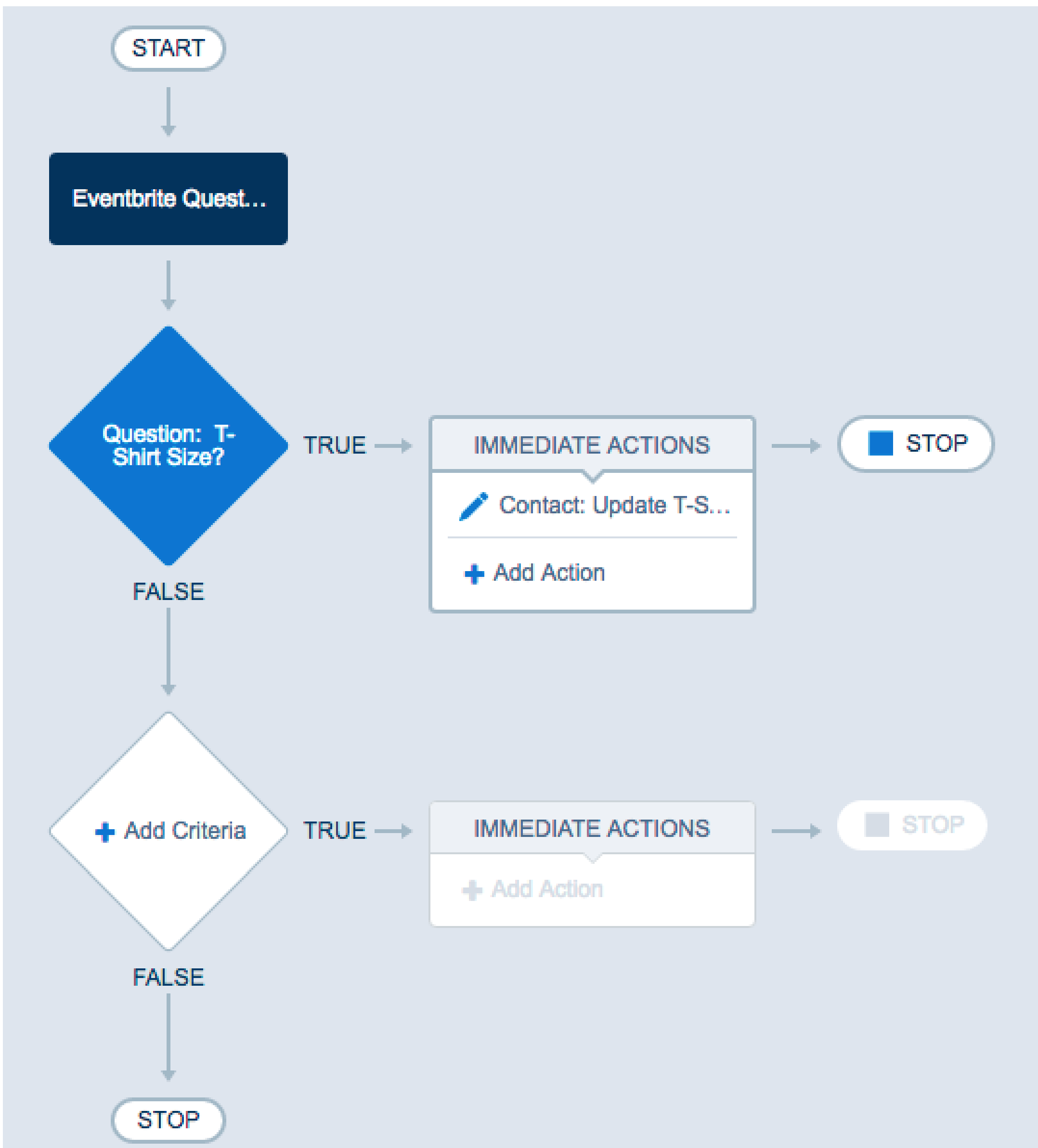
15. Select the “No criteria -- just update the records!” radio option



16. Provide the field values as follows, then click on the blue “Save” button.
    a. Field: T-Shirt Size
    b. Type: Reference
    c. Value: EventbriteSync__EventbriteQuestion__c → Answer



17. At this point, your process flow should look like this:



18. If you want to map additional questions, click on the “+Add Criteria” block to repeat the above steps. Once complete, click on the “Stop” block to the right of your first question to tell the flow to move onto the next criteria (move onto the next question).
19. When complete, click on the blue “Active” button in the upper-right hand corner to turn on the flow.

Commonly Asked Questions

I’m creating Contact records for Eventbrite Buyers and/or Contacts and the resulting records do not have parent Accounts. How do I configure the app to do so?

It’s not uncommon to have other AppExchange apps installed in your org to handle parent Account creation for Contacts, like the Non-Profit Success Pack (NPSP), or custom logic that was created by your in-house team. However, if this is not the case and you want to avoid having “orphaned” Contact records, you can leverage the “Create Parent Accounts” setting, found on the “Buyers” and “Attendee Profile” mapping pages to control parent Account creation for Contact records.

See this section of the documentation for more details: [General Options - Buyers or Attendees/Contacts - Create Parent Accounts]

Eventbrite Integration Log Errors and Possible Solutions

The OAuth token you provided was invalid.

Log Message:
{"status_code": 401, "error_description": "The OAuth token you provided was invalid.", "error": "INVALID_AUTH"}

Explanation:
This typically means that a previously authenticated account’s access could not be refreshed/regranted either through expiration, account changes, or access revocation.

Resolution:
From the “Eventbrite” Tab, scroll down to the “Authentication” section and take note of the username next to the “Authenticated as” field. Next to that username, click on the “Reset” link. This will take you to another page which will allow you to re-authenticate and verify the account credentials. Click on the “Reset Authentication” button at the top

of the page and follow the prompts to log in to Eventbrite. This process will be very similar to the flow experienced the first time the authentication was performed.

Assuming your credentials are valid, you'll be taken back to the main "Eventbrite" Tab in Salesforce. Attempt an import again and review the "Eventbrite Integration Logs" Tab for any authentication related issues.

Should you continue to experience issues, reach out to the Eventbrite support team, indicating the error and the username used to authenticate. Do not provide your password in the support email/ticket.

Processing Exception

Log Message:
The log's Description will read "Processing Exception" and the "Response" field value will vary.

Explanation:
This message will occur when using the "Advanced" mode where records are being processed from the various Eventbrite "Import" object, leveraging the Eventbrite to Salesforce object and field mappings.

Typically, receiving this message indicates that the app is unable to insert or update a record due to an invalid field mapping, customer validation rule, required field, or other logic that may prevent a record from being inserted/updated.

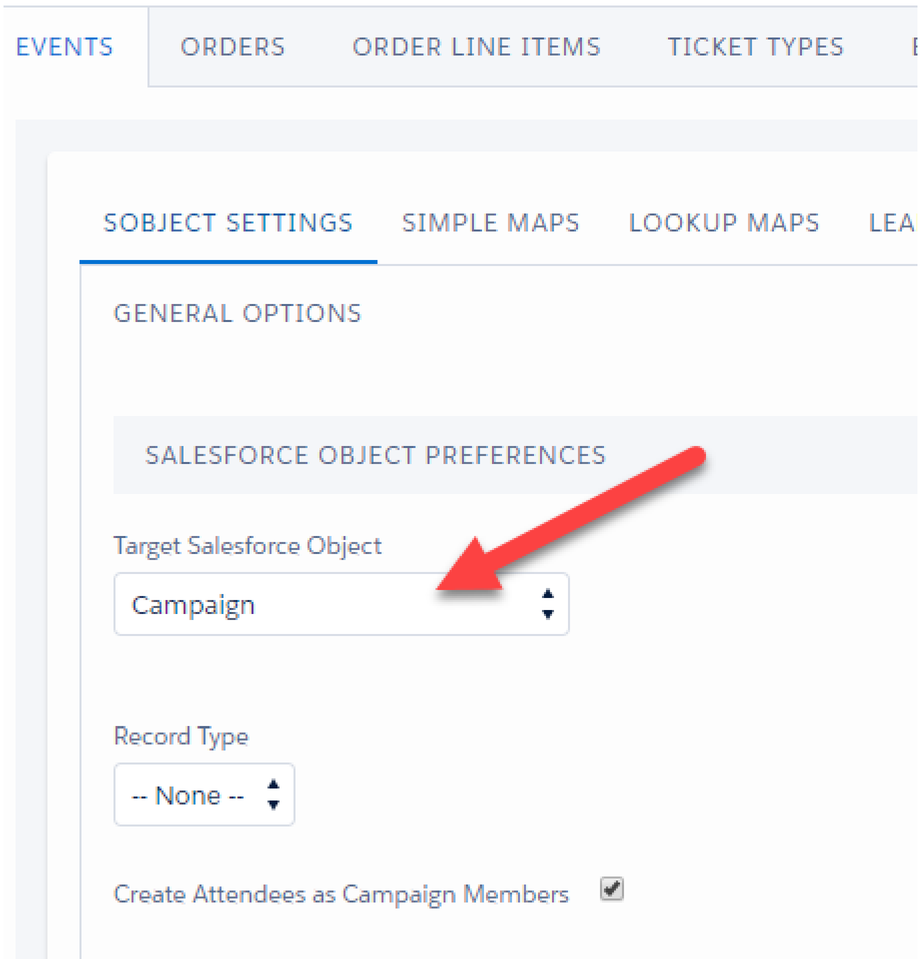
Resolution:
Review the "Response" field within the Log record. When possible, the exact error will appear here, giving you insight into if it is a validation rule, required field, or otherwise. Often, Salesforce record ids, text values of 15 or 18 alphanumeric characters will be included. This will help you pinpoint the exact record failing the processing step. Copy this record id to your clipboard and paste it into your browser's URL bar, immediately after the ...salesforce.com (e.g. na4.salesforce.com/70159000000LI24 - the "na4" will vary depending on your Salesforce org). Determine which type of record this is, review the mappings for that Eventbrite type as well as any validation rules, required fields, and custom logic like Apex triggers for the mapped target type (e.g. Eventbrite Events mapped to Salesforce Campaigns by default).

Advanced: Changing Target Objects

The imported data from Eventbrite has many parent/child relationships.

Events: Orders, Ticket Types, Order Line Items, Promo Codes
Orders: Order Line Items
Ticket Types: Order Line Items
Promo Code: Order Line Items

By changing the “Target Salesforce Object” picklist for an “Eventbrite Object” it is possible to populate records of alternate object types instead of the defaults.

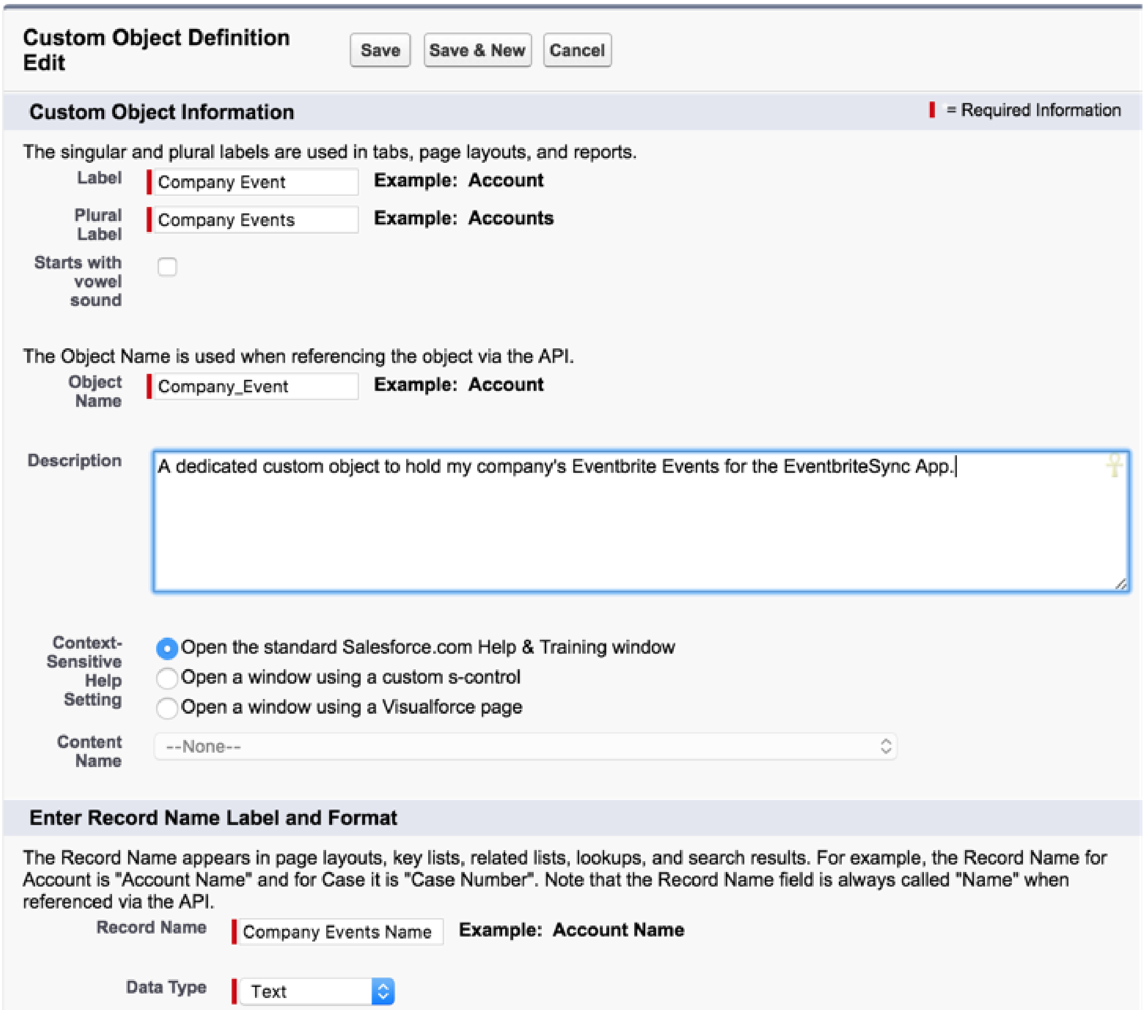


Eventbrite “Events” will be created as Salesforce “Campaigns”

Let’s look at an example scenario where you want Eventbrite “Events” to be created as a new Custom Object called “CompanyEvent__c.”

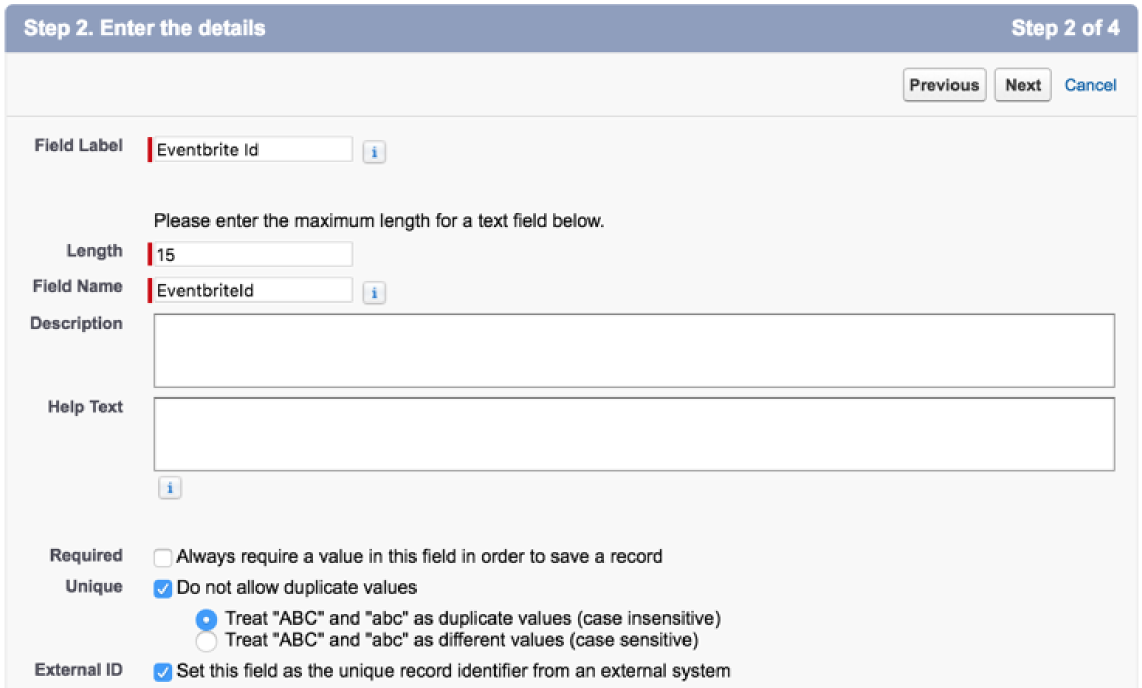
Steps:

1. Create the new Custom Object if you don’t have one already (Setup → Objects).



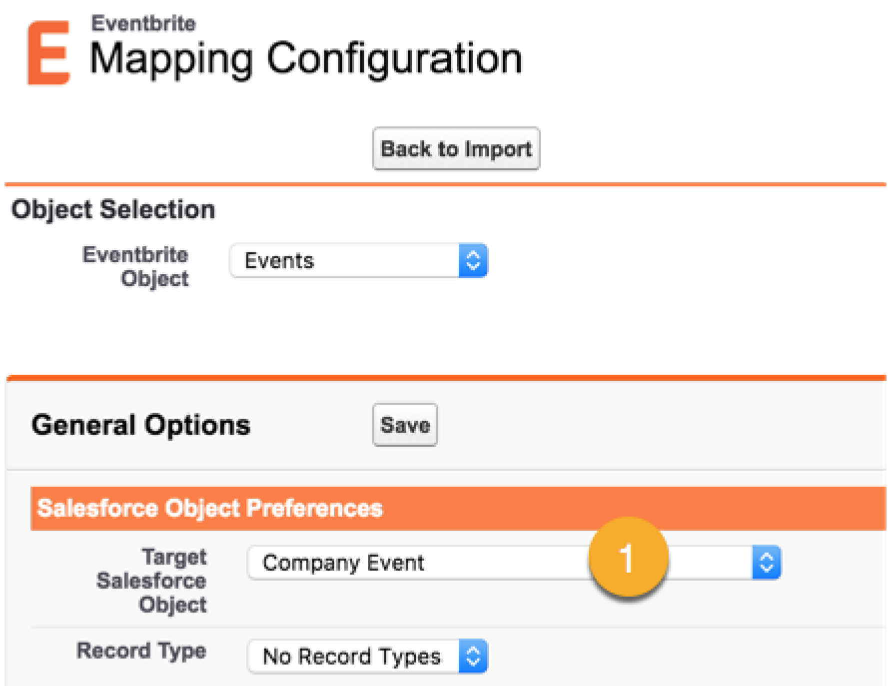
You can use an existing Custom Object or create a new one using any name you'd like.

2. Create a new field called "Eventbrite Id"
    a. Type: Text
    b. Label: Eventbrite Id
    c. Length: 15 Characters
    d. Field Name: EventbriteId (no underscores)
    e. Unique: Yes (case insensitive option)
    f. External Id: Yes

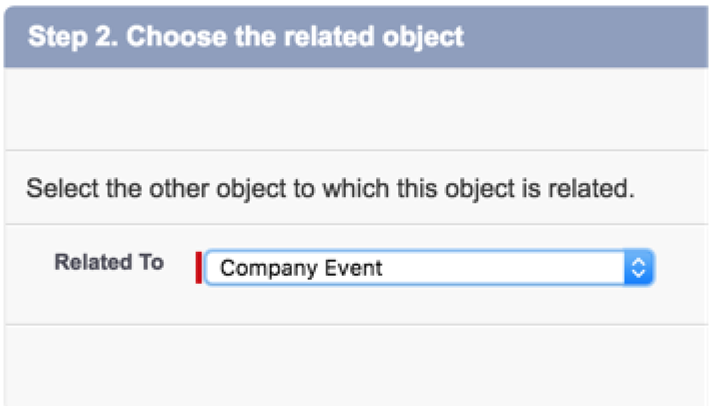


The field should not allow dupes and be case insensitive.

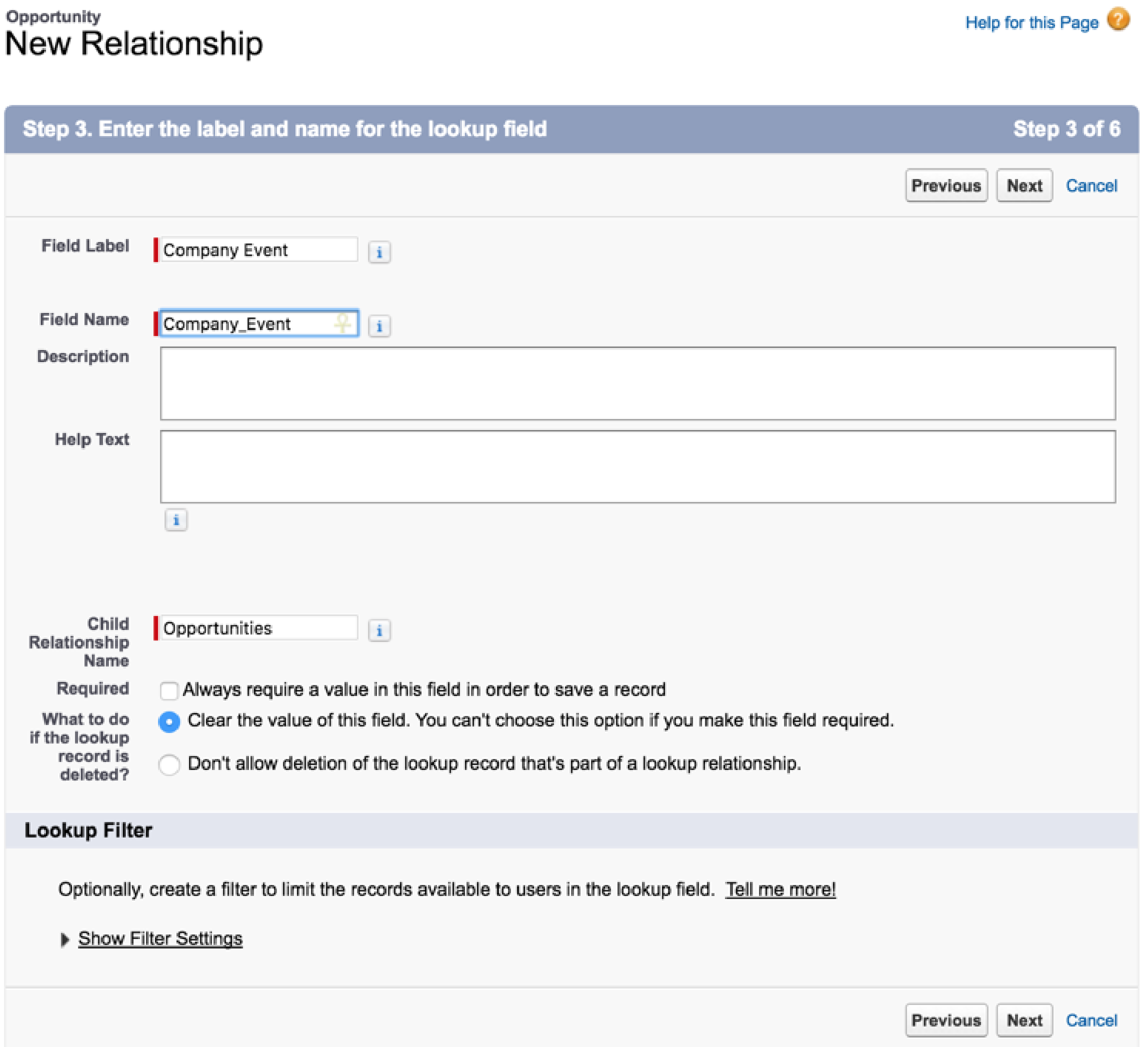
3. Create the additional fields you'd like to map (IE: Description, Status, etc).
4. Change the Eventbrite "Events" Target Object to your new Custom Object



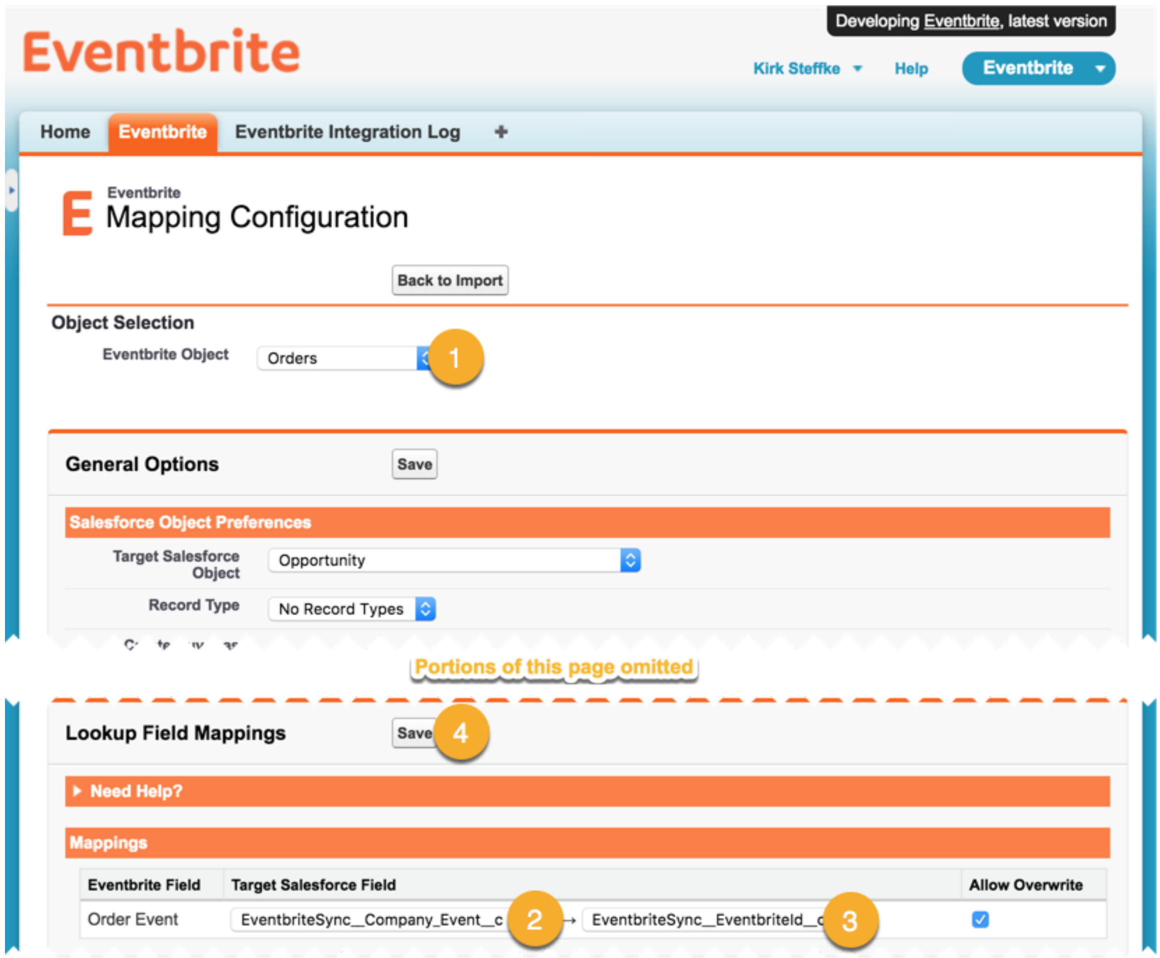
5. Create replacement lookups to your new Custom Object on the related child objects of Events. These will be the Target Salesforce Objects you have specified for Orders, Ticket Types, Order Line Items, and Promo Codes. By default, these are the Opportunity, EventbriteSync__Ticket_Type__c, EventbriteSync__OrderLineItem__c, and EventbriteSync__PromotionalCode__c objects.
    a. Type: Lookup Relationship
    b. Related To: Company Event (or the object you're replacing Campaigns with)



    c. No special requirements for the field settings



d. Repeat for each of the other child objects related to Events (Ticket Types, Order Line Items, and Promotional Codes).
e. Update the child Eventbrite Object mappings
   i. Toggle the "Eventbrite Object" dropdown to one of the child objects
   ii. Scroll down to the "Lookup Field Mappings" section and find the row that relates to the parent object (IE: Order Event for this example)
   iii. Choose your new Custom Object within the "Target Salesforce Field" column dropdown.
   iv. Choose the new external id/unique text field you created for the 2nd dropdown on that row.
   v. Click on the "Save" button.
   vi. Repeat for the other child objects related to Events.



Known Issues

Testing Webhooks from Sandbox Orgs [Resolved - 3/2017]

Per Salesforce requirements, Eventbrite has performed the necessary updates to support TLS v1.1+. Previous limitations around testing webhooks in sandbox environments no longer apply.

Event Import Filters Not Respected in Order Imports - [Resolved - v2.3.4]

Full Error: Import Error(s) - Orders - 732: INVALID_FIELD, Foreign key external ID: <*event id*> not found for field EventbriteSync__EventbriteId__c in entity EventbriteSync__EventbriteEventImport__c

Details: This error occurs when an Events and Orders are enabled for import and an Event Status Filter is defined. A valid Order includes an

Event that doesn't match that filter. However, the Event was previously a valid Event to be imported. The result is the above error recorded in the Eventbrite Integration Logs

Integration Log Error: "Cannot have more than 10 chunks in a single operation." - [Resolved - v2.2.2]

This error message can be experienced when using versions prior to v2.2.2. A fix for the issue was resolved in v2.2.2. If experienced in this version or new, please contact eventbritesync@eventbrite.com.

Mapping Configuration: Unable to Clear/Remove/Empty Field Mappings - [Resolved - v2.2.3]

When on the "Mapping Configuration" screen, while the "Advanced Processing" feature is enabled, some Eventbrite datapoints/fields are not mapped by default. After mapping these data points to Salesforce fields, users were unable to remove the Salesforce field selection. An update to the "Mapping Configuration" screen's layout addresses this by displaying only the mapped fields, providing the ability to remove the mapping altogether.