

KINDFUL CONFIGURATION PROCESS

Overview

FlexFormz has the ability to add donors and donation details to your existing Kindful account to be able to take advantage of the CRM features.

There are a few Kindful settings that need to be adjusted in a specific way, to allow the integration with the FlexFormz platform. In this section we'll describe each one.

Custom App Setup With Kindful

Application level connections are made through the “Apps” section on Kindful. Doing so allows Kindful to trace the origin of contacts and transactions received from an external service.

Once logged in to your Kindful account, click on the main sidebar, Apps group, Custom Apps option (Figure 1).

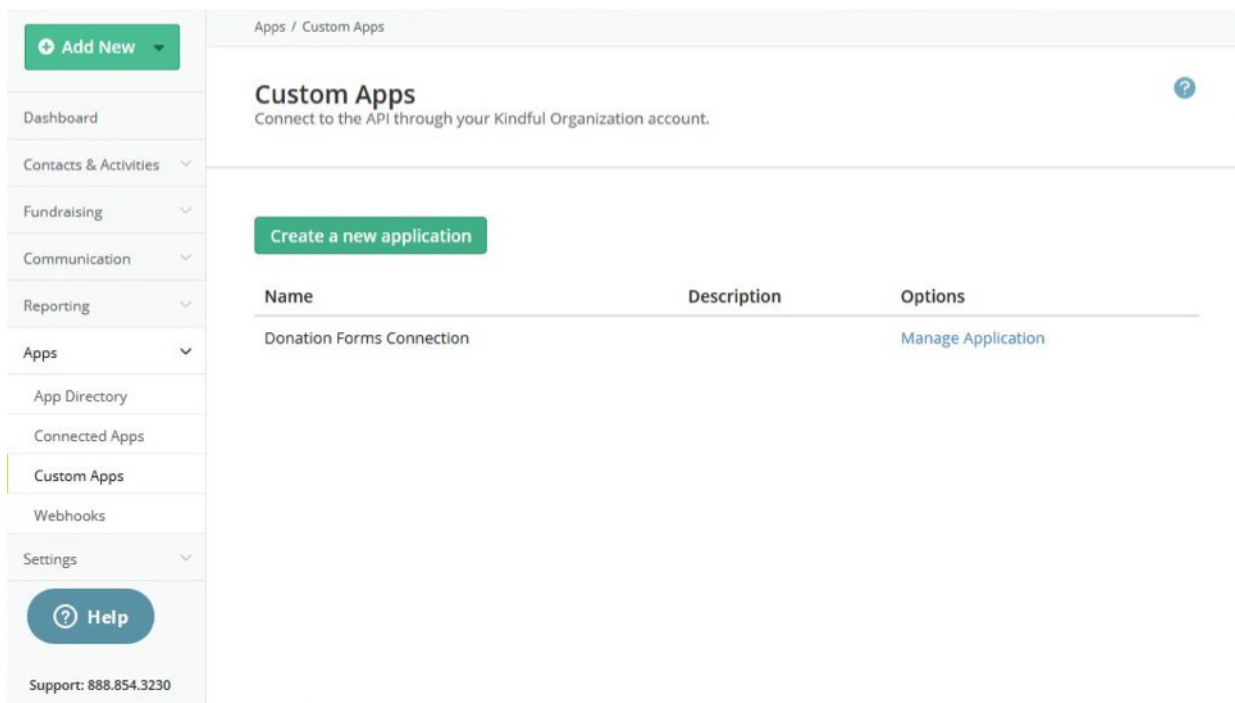


Figure 1: Custom Apps section



If you do not see this section, you must send an email to the Kindful support team, requesting them to enable this feature for you.

Click on **Create a new application** and insert a name and description in the creation dialog box (Figure 2).

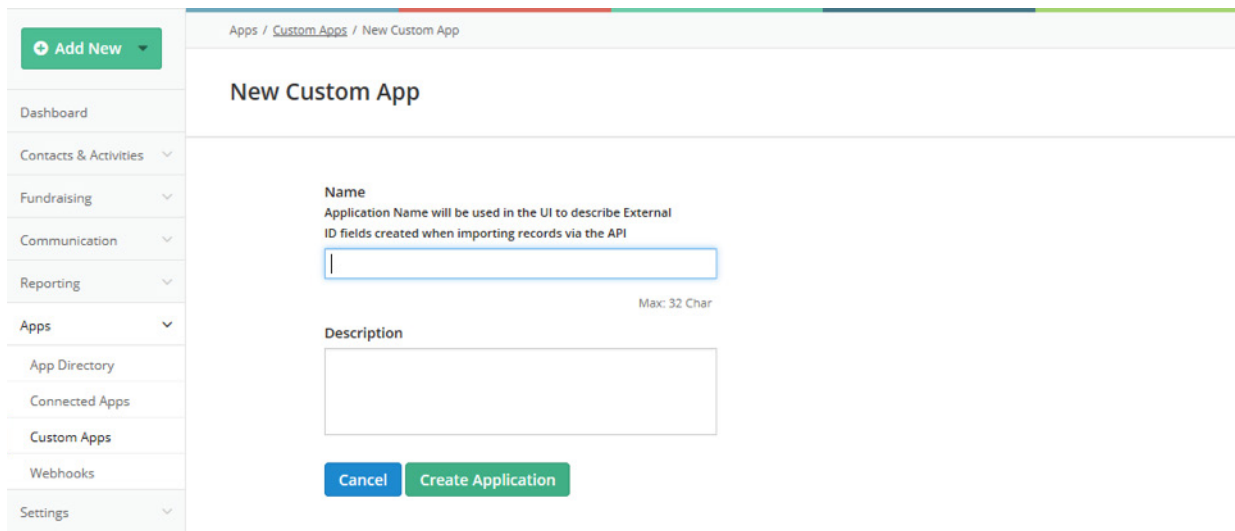


Figure 2: New application dialog box

The new application will appear in the Custom Apps list; click on the **Manage Application** option, next to the corresponding list item (Figure 1).

In the management panel (Figure 3), click on **Manage Credentials** to get the **Application token** (Figure 4). Once you configure the FlexFormz connection, this is going to be the **Live API Token**. Store it in a secure location.

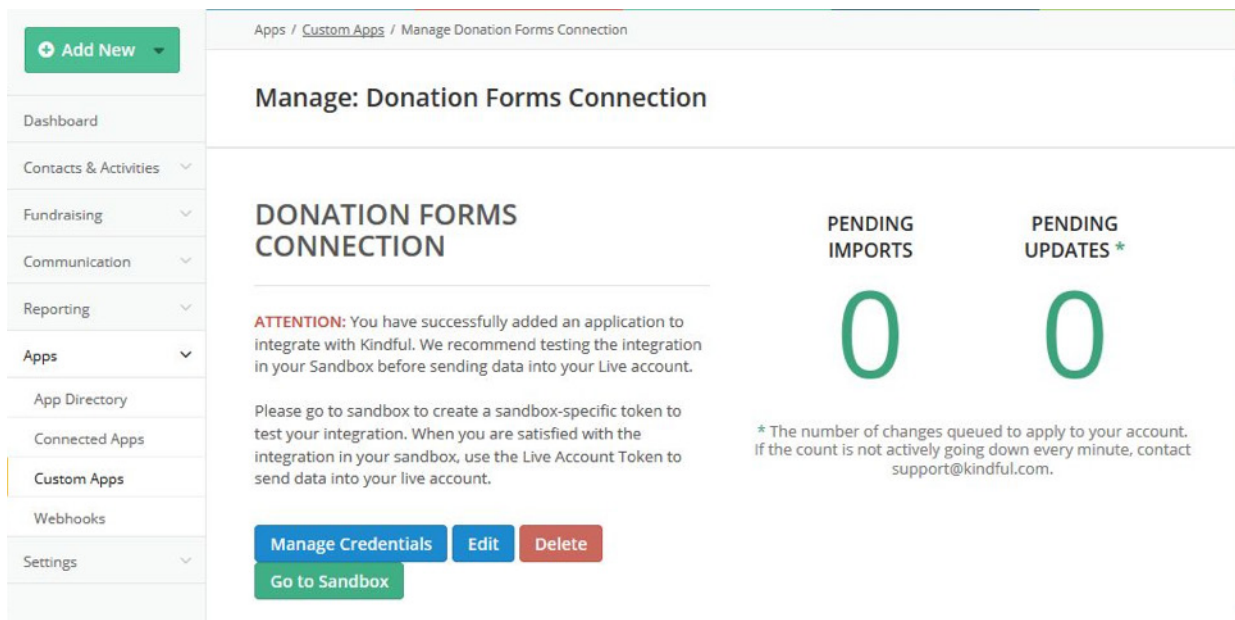
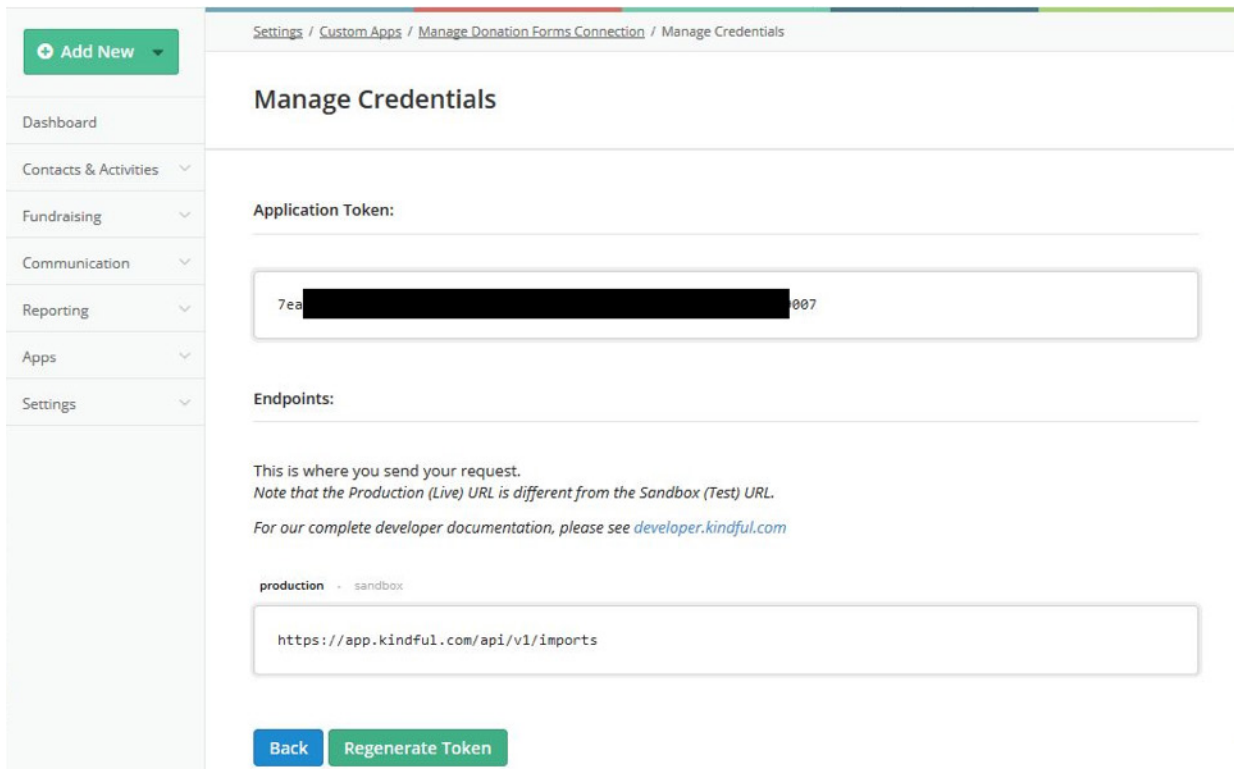


Figure 3: Custom application management section



Settings / Custom Apps / Manage Donation Forms Connection / Manage Credentials

Manage Credentials

Application Token:

7ea [redacted] 007

Endpoints:

This is where you send your request.
Note that the *Production (Live) URL* is different from the *Sandbox (Test) URL*.
For our complete developer documentation, please see developer.kindful.com

production - sandbox

https://app.kindful.com/api/v1/imports

[Back](#) [Regenerate Token](#)

Figure 4: Application token page

Back in the management panel, click on **Go to sandbox** (Figure 3). You'll be taken to a testing account, that looks like your Live Kindful account, with a development toolbar (Figure 5).

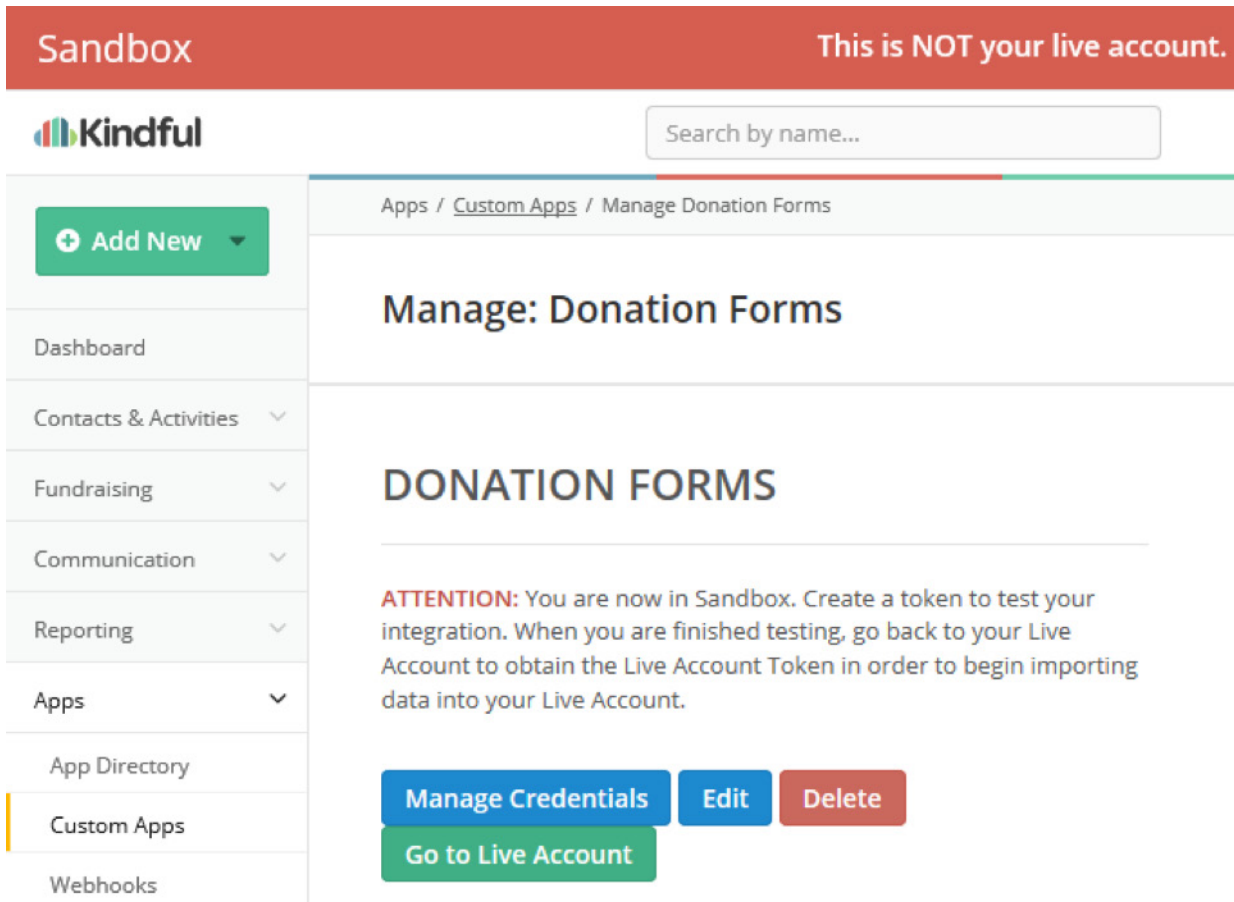


Figure 5: Sandbox account

In the sandbox management panel, click on **Manage Credentials** to get the **Application token**. On FlexFormz settings, this is going to be the **Sandbox API Token**. Store it in a secure location as well.

FlexFormz Connection Setup

Once the two Application tokens have been generated, go to the FlexFormz **Account settings** » **CRM Integration Options** panel, and click on Connect Kindful option (Figure 6). Paste the application tokens in their proper fields and save (Figure 7).

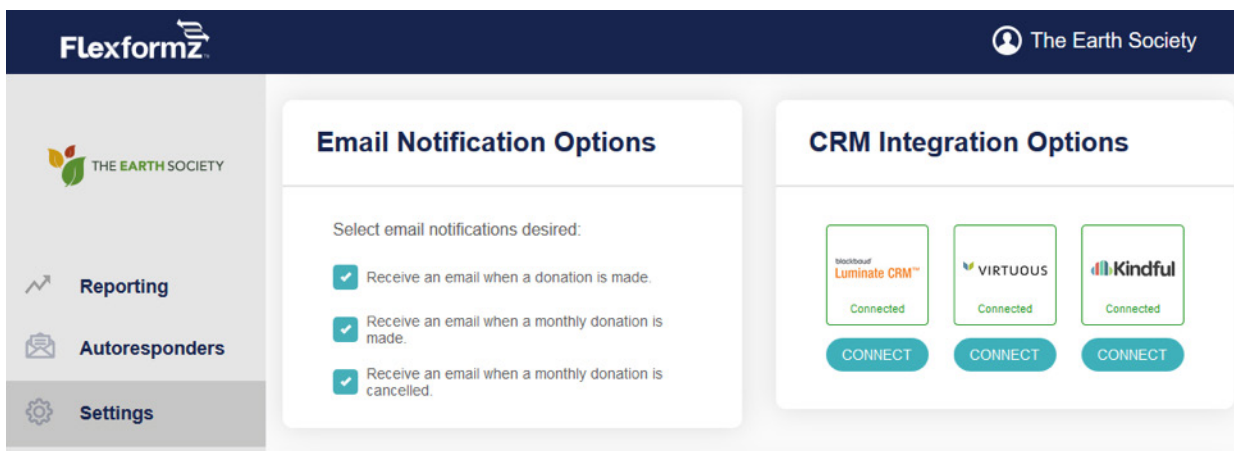


Figure 6: Account setting

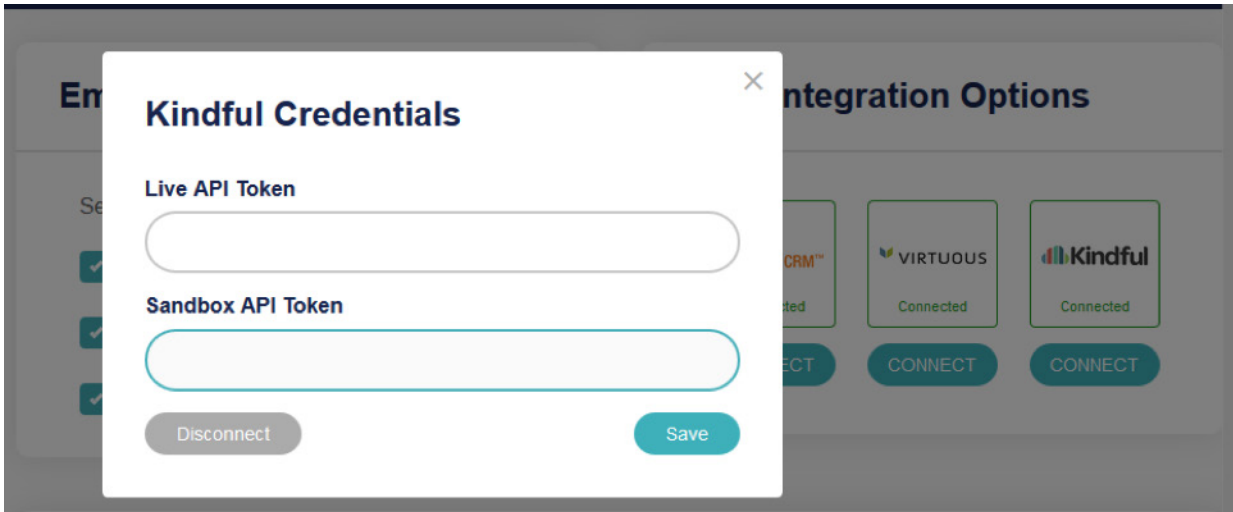


Figure 7: Kindful connection setup

When building a donation form in Wordpress, using the FlexFormz plugin, it is possible to activate a test mode, to make sure everything is working properly. When this mode is activated, the test mode is activated in Kindful as well and those transactions will be registered in the sandbox account.