

# Supercharging Web Communications: Integrating Python Apps with Salesforce.com CRM

Christopher Johnson

CEO  
ifPeople  
[www.ifpeople.net](http://www.ifpeople.net)

Your success.  
Our cloud.

The power of uS™





*if* PEOPLE  
*innovation for people*



- **Social Enterprise**
- **Partnership-Based**
- **Strategy-Centered**

 salesforce.com  
foundation®

The power of u



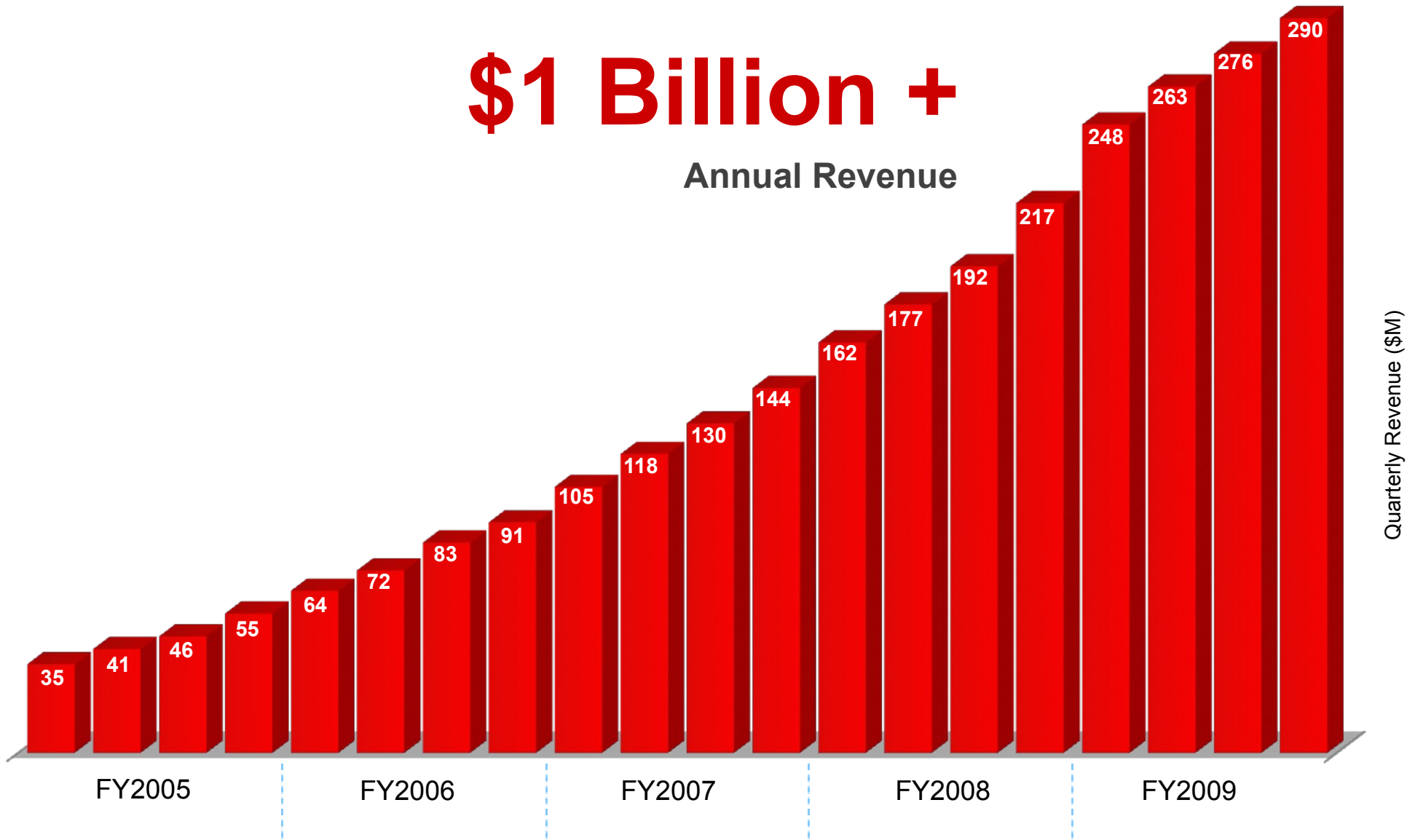


- Online tools and strategies
- Environmental sector
- Consultants and innovators
  
- David Glick
  - Web Developer for Groundwire
  - Member, Plone 4 Framework Team

# First Cloud Company to Exceed: Salesforce.com

## \$1 Billion +

Annual Revenue

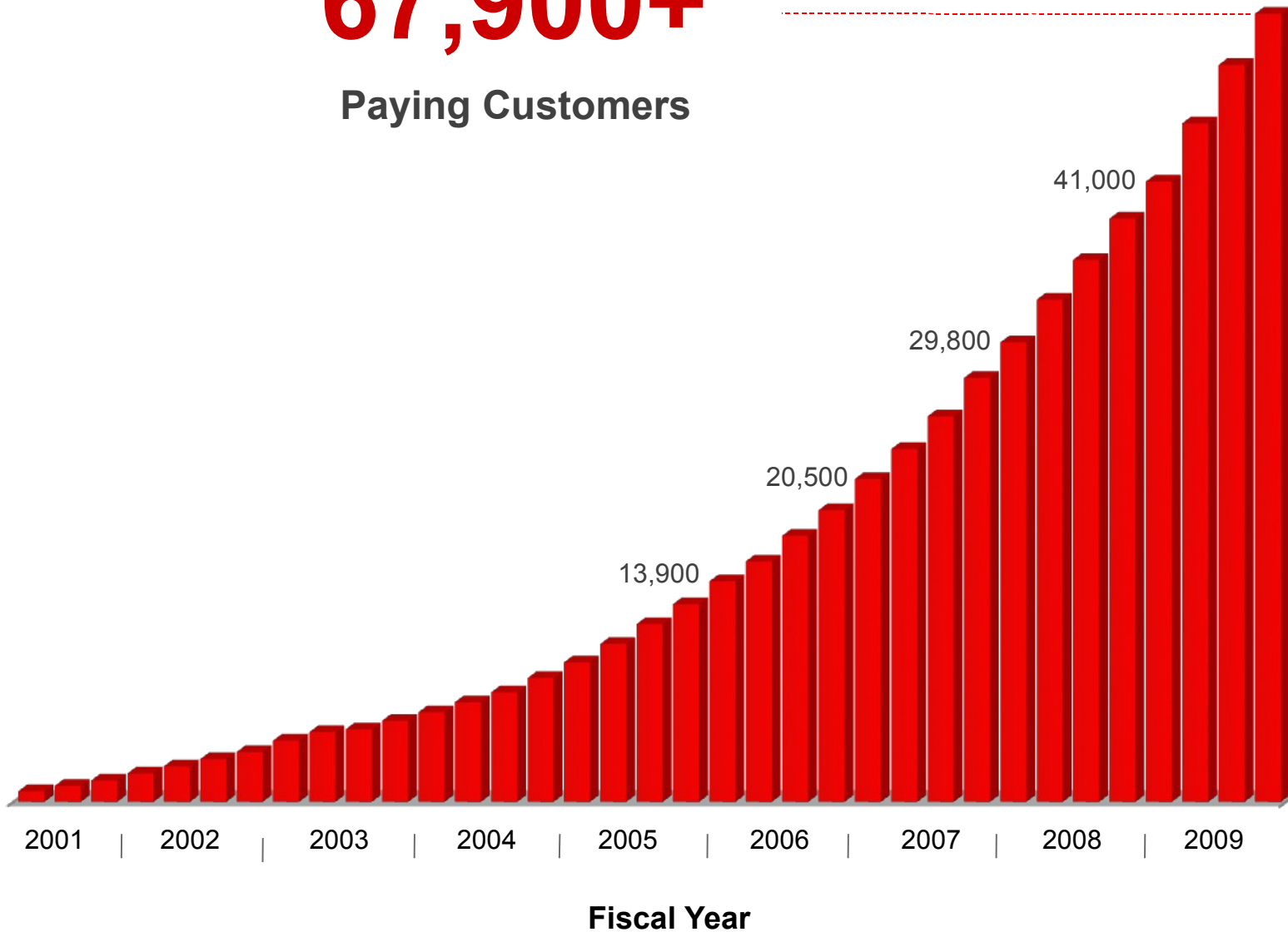


Revenue through fiscal quarter ended 1/31/09

# Strong Growth in New Customers

**67,900+**

Paying Customers



# 1/1/1 Model for Strategic Corporate Philanthropy



**S**alesforce.com  
foundation®

**125,000+** hours community service  
**7,000+** non-profit organizations  
**\$13 million+** grants

**1** %  
Time  
Equity  
Product





## Exponential Growth and Satisfied Customers!

- 97% of nonprofits will continue to use
- 96% would recommend to others
- 84% already have recommended to others


# Nonprofit Use Cases

- Case management
- Donor development
- Outcome tracking
- Volunteer management
- Referrals and job placement
- More!





# Contact record with donation

The power of  Setup · System Log · Help & Training · Logout force.com apps Nonprofitforce

Home **Contacts** Organizations Households Campaigns Donations Pledges Recurring Donations Reports Documents VR Email VR Statistics Program Designations Product Details

**Search**











Organizations


Limit to items I own

Advanced Search...

Create New...

**Recent Items**

-  [Nancy \[redacted\]](#)
-  [Gifts from the Heart](#)
-  [Nancy \[redacted\] Donation - 4/08/09](#)
-  [Alan F. \[redacted\] Donation - 4/08/09](#)
-  [Alan F. \[redacted\]](#)
-  [Shelley \[redacted\]](#)
-  [Rosalind \[redacted\]](#)
-  [East Heights United Methodist](#)
-  [Delrose United Methodist Church](#)
-  [Kansas Area United Methodist Foundation, Inc](#)

 [Recycle Bin](#)

**Contact Nancy** [Printable View](#) | [Customize Page](#) | [Edit Layout](#) | [Help for this Page](#)

[Back to List: Contacts](#)

[Donations \[1\]](#) | [Pledges \[0\]](#) | [Recurring Donations \[0\]](#) | [Notes & Attachments \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Campaign History \[0\]](#) | [HTML Email Status \[0\]](#)

**Donations** [Donations Help](#)

[Contact Donation](#) | [Contact Pledge Payment](#) | [Contact Donation History](#)

<input type="checkbox"/>	Action	Donation Name	Stage (Status)	Amount Type	Close Date
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Nancy [redacted] Donation - 4/08/09	Unverified	\$150.00 One-time Donation	4/8/2009

Organization Name Individual Informal First Name

Title Gender

Department Pronunciation

Household Nancy [redacted] Household Primary Contact at the Org

Donor

**Combined Names and Other Contact Info**

Household Infomal Name Nancy Balbir's Contact

Household Mailing Label Nancy [redacted] Special Contact For

Board Of Trustees Role

**Phone Fax Email**

Work Phone Email nancy@[redacted]

Phone Extension Email 2

Mobile Email Opt Out

Home Phone [redacted] Do Not Email

Other Phone Email 2 Do Not Use

Fax Mail Status  No Mail

Preferred Phone  Do Not Call

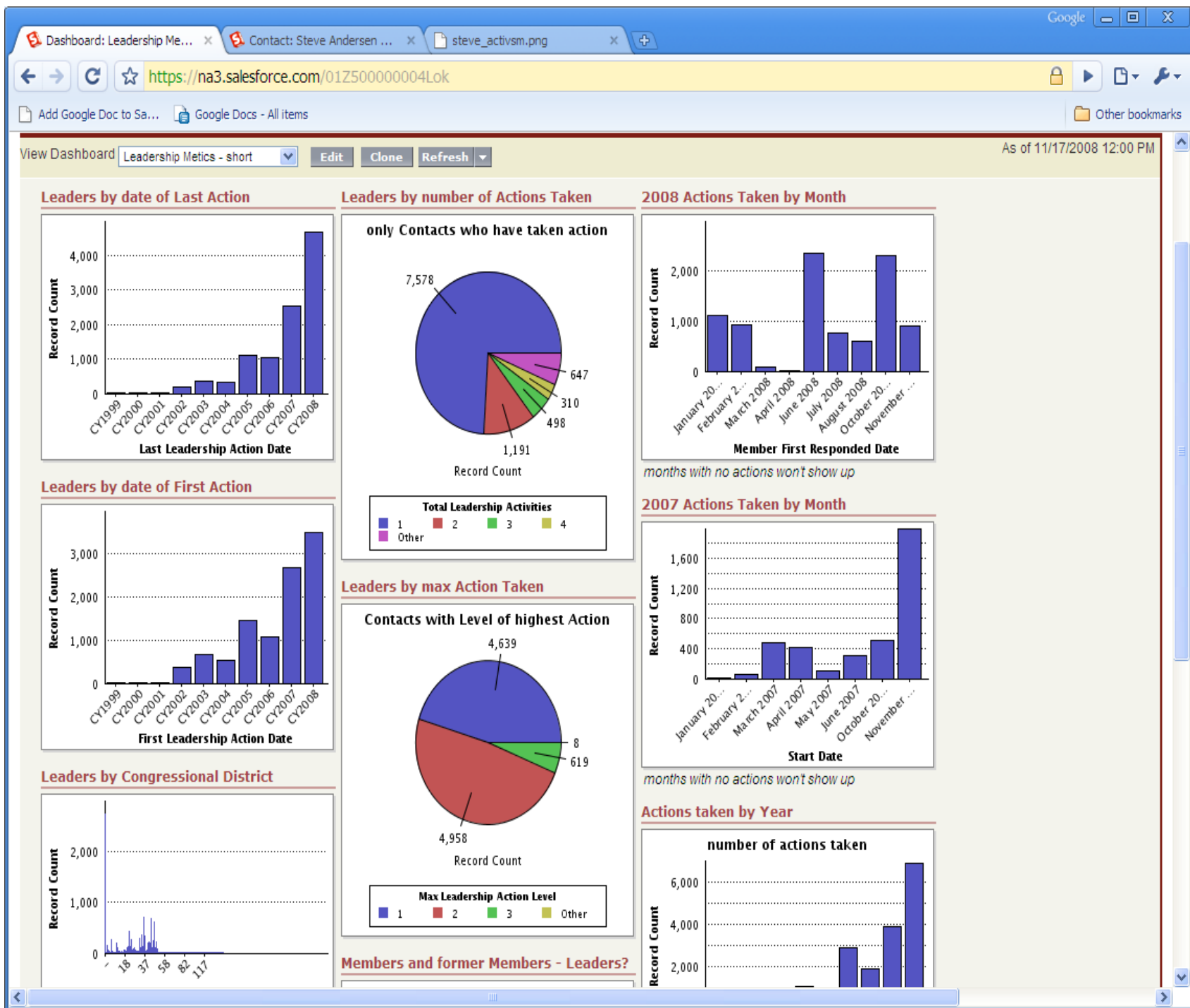
Personal Website

**Mailing Information**

Mailing Address Type Primary Home "Other" Address Type

Mailing Addr Type Other  "Other" Addr Type Specify

Specifv



Real-time dashboards on engagement



**Dashboard Respite**

[Help for this Page](#) ?

[« Go to Dashboard List](#)

View Dashboard

As of 10/13/2009 4:02 PM

**ARCH**

**Total Enrolled Consumers**



**ARCH**

**Enrolled Consumers WITH Allotted Hours**



**ARCH**

**Active Consumers Utilizing Arc Hours**



**ARCH**

**FY 2010 Arc Hours Allotted**

Member Record    Sum of Arc Allotted

**ARCH**

**FY 2010 Arc Hours Used**

Member Record    Sum of Arc Hrs

**ARCH**

**Average Consumer Age**

Member Record Type    Average Age

# The Real-Time Cloud



The world's most **complete** software-as-a-service apps.



The **fastest** way to build in the cloud with platform-as-a-service.



**Low cost** infrastructure-as-a-service.



Real-Time Approvals  
& Workflow

Email &  
Productivity

Integrated Content  
Library

Genius

Partners

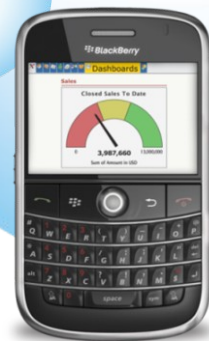
AppExchange

Forecasting  
& Analytics

Opportunities

Leads  
& Campaigns

Accounts  
& Contacts

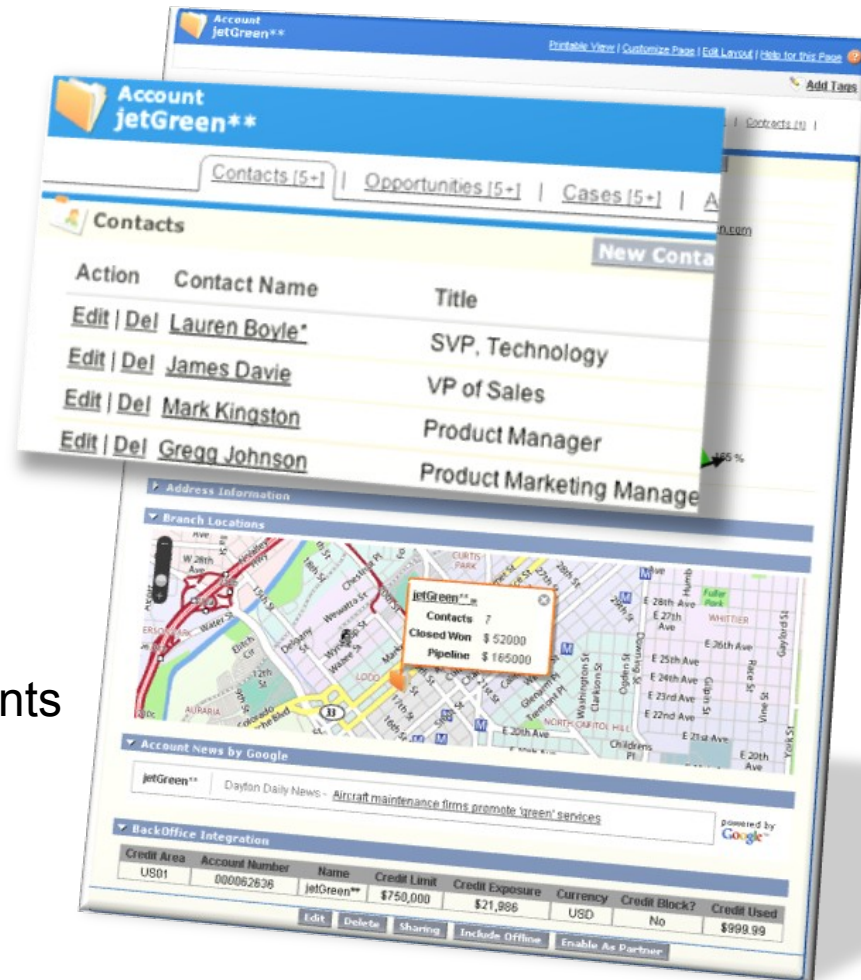


# Manage All Your Accounts & Contacts



## Maximize Rep Productivity

- Gain a 360° customer view
- Plan strategies
- Log calls, emails, tasks, and events
- Track activity history



“Using the Sales Cloud we’ve increased team productivity and sales velocity.”



# Align Marketing with Development



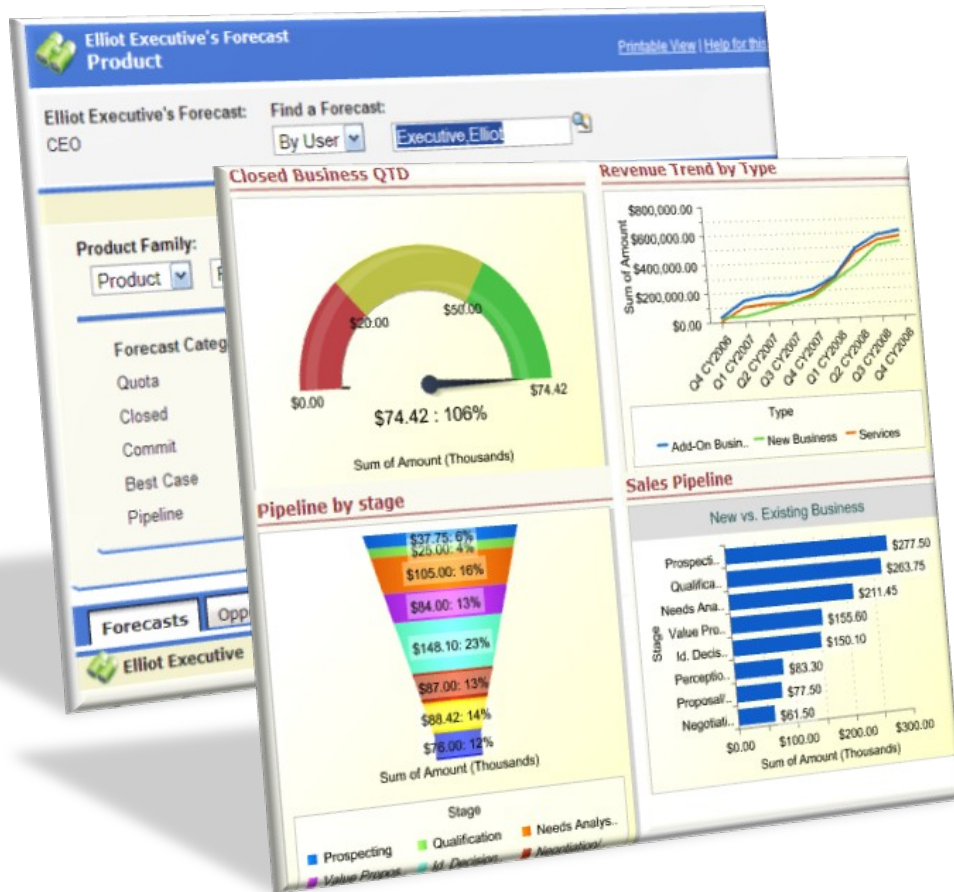
## Grow the Donations Pipeline

- Attract leads with Google AdWords
- Manage multi-channel campaigns
- Capture and route leads automatically
- Measure return on marketing spend

“The number of quality leads has **gone up by 50 to 75 percent** since we started using Salesforce.”



# Forecast and Analyze Your Sales in Real-Time



**Maximize Forecast Accuracy**  
with customizable forecasting

**Gain Real-Time Visibility**  
into performance, pipeline, revenue,  
win rates, and activities

“Salesforce helped us improve our revenue visibility to less than 1% variance, making our revenue linear and predictable.”





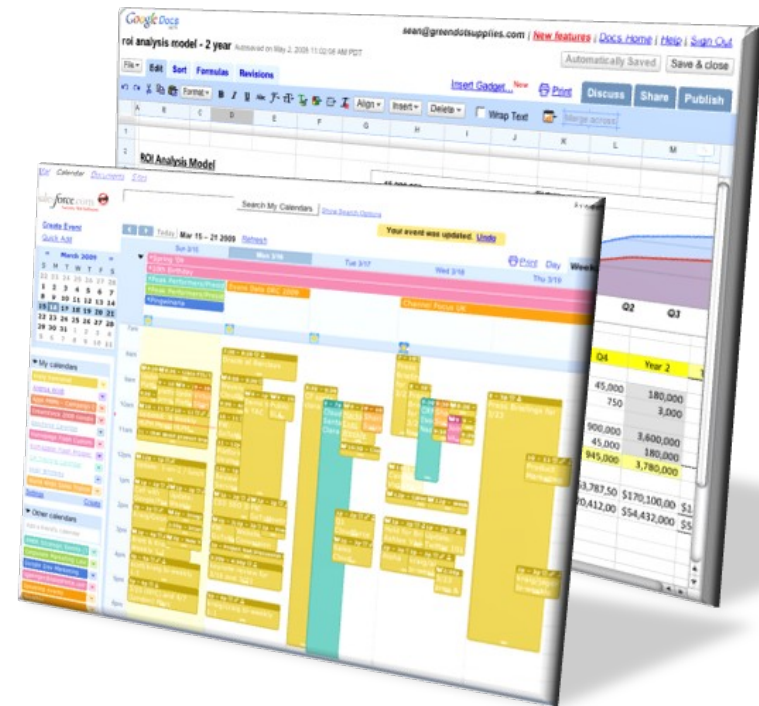
# Work Seamlessly with Office Productivity Apps



Email & Productivity

## Spend More Time Selling

When all your desktop apps work together



Microsoft Outlook

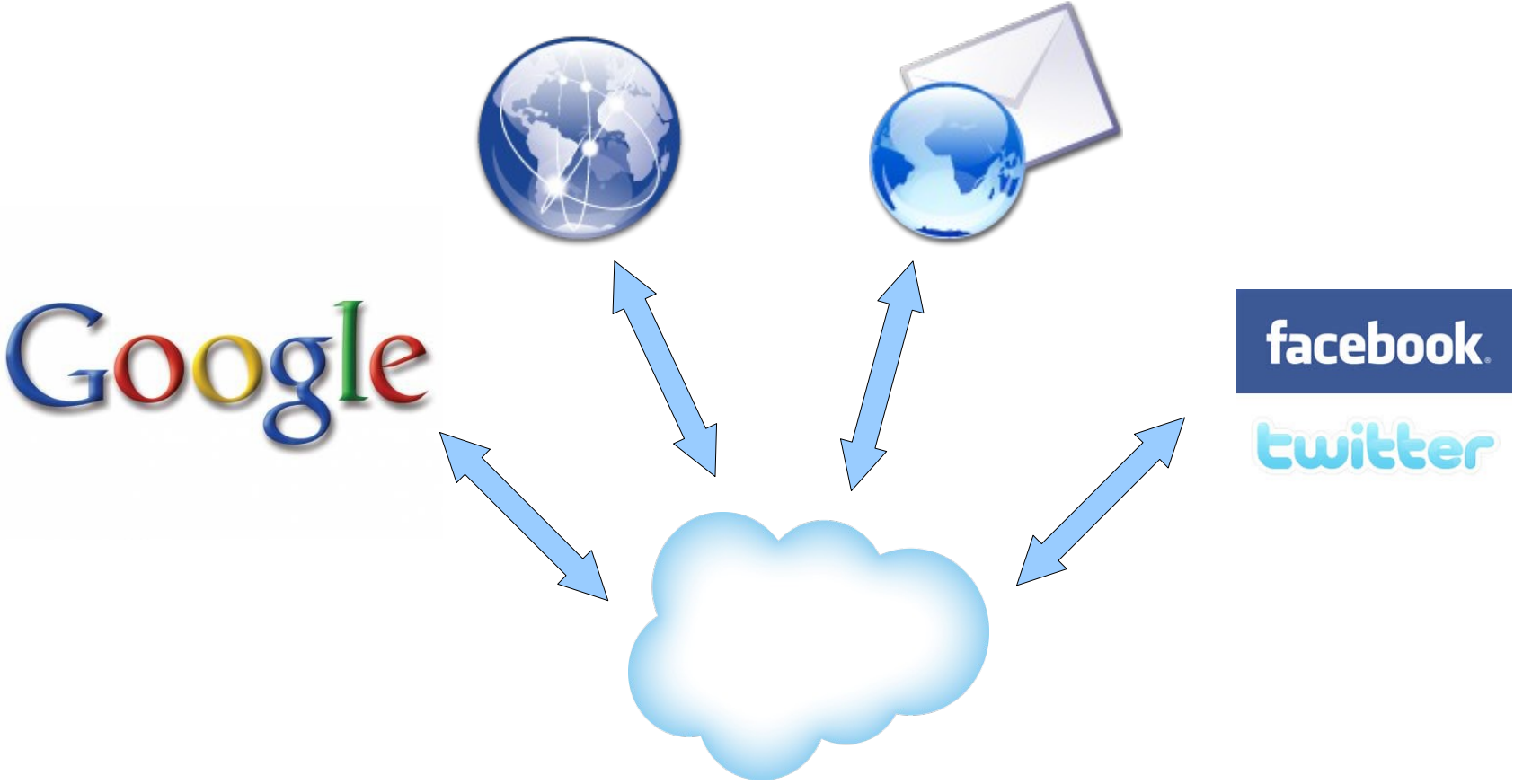


Lotus Notes



Google Apps

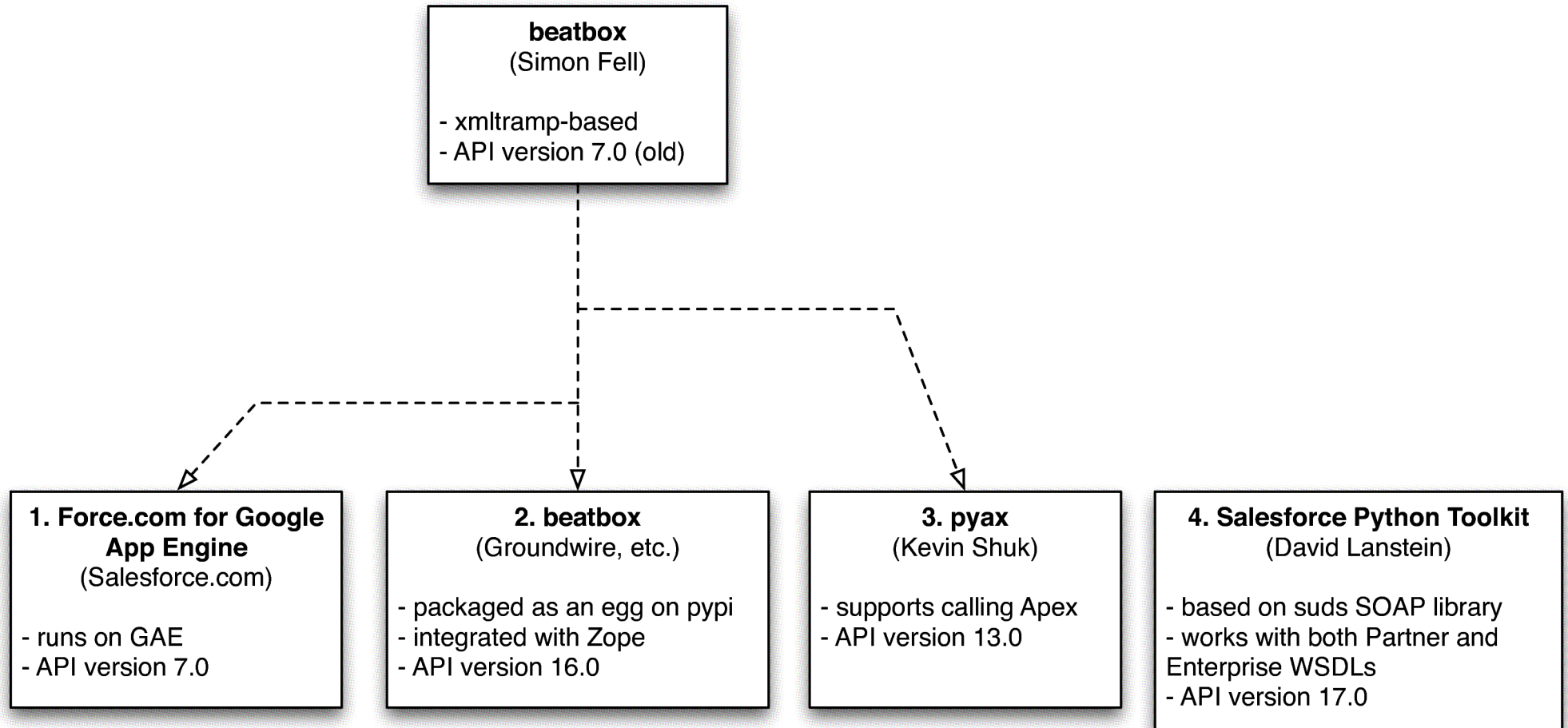
# Business Systems Talk to Each Other



# Super-charge Your App!



# Tools for talking to Salesforce



1. <http://code.google.com/p/force-app-engine>
2. <http://pypi.python.org/pypi/beatbox> / <http://code.google.com/p/salesforce-beatbox>
3. <https://launchpad.net/pyax>
4. <http://code.google.com/p/salesforce-python-toolkit>

# Salesforce and Plone

---



Beatbox				Python
Salesforce Base Connector				Zope
PFG Adapter	Auth Plugin (PAS)	RSVP for Salesforce	Custom Apps	Plone

# Code example: creating a contact

```
>>> from beatbox import PythonClient
>>> svc = PythonClient()
>>> svc.login(USERNAME, PASSWORD)

>>> new_contact = dict(
...     type = 'Contact',
...     FirstName = 'Guido',
...     LastName = 'van Rossum',
... )
>>> svc.create(new_contact)

>>> results = svc.query("SELECT LastName FROM Contact")
>>> results[0].LastName
'van Rossum'
```



- **Content Management System**
- **User-Friendly**
- **Open Source**
- **International Community**
- **Extensive functionality**
- **Customizable**
  - Use for Websites, Intranets, Community sites, Knowledge management

# Public Outreach With Salesforces

 Plone®





- Web-to-x Forms
- Events RSVP
- E-commerce

 Plone®





- Data from salesforce.com shown/interactive in Plone
- Login authentication



# CMS: Content Management System



Supports collaborative production and maintenance of web sites

Enables division of labor

Provides tools for authoring content

- Enables doing things systematically





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Find your national Oxfam office



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News Campaigns

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- [Conflict in Pakistan](#)
- [Cyclone Aila](#)
- [Crisis in Zimbabwe](#)
- [Conflict in D.R. Congo](#)
- [Conflict in Somalia](#)
- [Crisis in Gaza](#)
- [Darfur/Chad crisis](#)
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**Emergencies**



Asia-Pacific Disasters



Afghanistan



Conflict in the Democratic Republic of the Congo



**How you can help**

**Donate** - Help support our efforts to find lasting solutions to poverty and injustice

**Take action** - Make a difference right now. Take part in our international campaigns

**Subscribe to our newsletter**

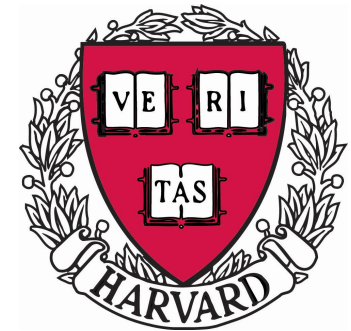
Email: \*

Add more details ▾

I accept the Terms & Conditions.\*

**Most popular tags**

aid [conflict](#) development emergency fair trade health



UCLA



# Online Forms





Van Jones



# Requests come in through form

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**Contact Us**

Green For All  
4545 Telegraph Avenue, Suite 600  
Oakland, California 94612  
(510) 552-9900

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**For Speaking Requests:**  
please contact us via [Speaking Request Form](#).

**For General Inquiries:**  
please complete the form below and click 'submit'.

**Request Subject \***

**Background Description \***  
Please describe your request

4000 characters remaining

**First Name \***

**Last Name \***

**E-Mail Address \***

**Confirm E-Mail Address \***

**Work Phone**

**Organization Name**

**Organization Street Address**

**Organization City**

**Organization State**

**Organization Zip/Postal Code**

Enter the text you see below (case sensitive) \*

Ivins acre

type the text words

Submit

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Built in Plone

Easy to edit

Dumps directly to  
Salesforce

# Request dashboard in Salesforce

**GREEN FOR ALL** Setup · System Log · Help & Training · Logout force.com Green for All

Home Contacts Organizations Campaigns Opportunities **Requests** Outcomes Reports Console Dashboards Google Docs Importer Help Docs

**All Open Requests** New Request Close Change Owner Change Status Delete

Create New View | Edit | Delete | Refresh

Action	Request Number	Contact Name	Organization Name	Subject	Request Record Type	Status	Date Opened
<a href="#">Edit</a>   <a href="#">Del</a>	00001973	[Redacted]	Community-Minded E	Youth Sustainabil	Speaking Request	New	1/15/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00001987	[Redacted]	Individual	Green Jobs	Speaking Request	New	1/20/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002001	[Redacted]	Wilbur Cross High Sch	High School	Speaking Request	New	1/22/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002004	[Redacted]	Students for a Sustain	Come Speak at S	Speaking Request	New	1/22/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002011	[Redacted]	Individual	Youth Involvement	Speaking Request	New	1/24/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002025	[Redacted]	Laramie County Comr	Cheyenne, WY	Speaking Request	New	1/25/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002026	[Redacted]	NJ Community Water	Green Economy	Speaking Request	New	1/25/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002027	[Redacted]	UC Davis Center for B	Sustainability and	Speaking Request	New	1/25/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002029	[Redacted]	Product Realization N	Manufacturing in I	Speaking Request	New	1/25/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002041	[Redacted]	Individual	Wisconsin Techn	Speaking Request	New	1/27/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002048	[Redacted]	ASID California North	Book Discussion	Speaking Request	New	1/28/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002052	[Redacted]	Solar San Antonio	San Antonio	Speaking Request	New	1/28/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002054	[Redacted]	Economic Developme	Speaking Request	Speaking Request	New	1/29/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002055	[Redacted]	University of Colorado	Van Jones - green	Speaking Request	New	1/29/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002071	[Redacted]	Lead @ DeAnza Collie	Green Jobs for Mi	Speaking Request	New	2/1/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002120	[Redacted]	Sierra Club	Brief speech by V	Speaking Request	New	2/9/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002211	[Redacted]	Community Investmen	Chic Engagemen	Speaking Request	New	2/23/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002264	[Redacted]	Individual	Van Jones on The	Speaking Request	New	3/2/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002286	[Redacted]	hel Iowa Renewable Ener	Green energy eco	Speaking Request	New	3/2/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002299	[Redacted]	Petaluma Progressive	Van Jones	Speaking Request	New	3/3/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002308	[Redacted]	Transition Rogers Par	national green job	Speaking Request	New	3/4/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002316	[Redacted]	Individual	UC Davis Americi	Speaking Request	New	3/5/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002323	[Redacted]	Individual	Green Jobs for Ar	Speaking Request	New	3/6/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002328	[Redacted]	FIU Students For Envir	invitation for FIU E	Speaking Request	New	3/6/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002334	[Redacted]	Individual	test please ignor	Speaking Request	New	3/9/2009
<a href="#">Edit</a>   <a href="#">Del</a>	00002335	[Redacted]	Community Action Par	Keynote at Diston	Speaking Request	New	3/9/2009

1-145 of 145 0 Selected Previous Next Page 1 of 1

# Form Creation



Contents View Edit Rules Sharing History  
Translate into... Actions Add new... State: Private

## Online Fundraising Workshop

Did you know that online donor growth increased 101% between 2003 and 2006? Or that statistics prove that people give more money online than through mail? These are just two reasons why online fundraising is more important now than ever, especially to small- to mid-sized nonprofits. Our third and final workshop this summer explores the ins and outs of raising money online. You'll not only learn different strategies for online fundraising, but also how to use donor tools, how to frame your online ask to attract donors, and how to use Web 2.0 tools like social networking sites or charity mails to increase donations. This course is perfect for any organization interested in improving its ability to attract online donors.

### Comments

### Subject

Submit

- Featured Sites
- Latest News

your cart

Contains 2 Items

- Manage Cart
- Checkout

### case studies



### Investors Circle

Serving the needs of members of the investor network and applicants for investments, the site enables collaboration, community, and management of the application system.

- More Success Stories

### trainings & webinars

- Developing a Social Media Strategy: Summer Workshop Series
- Techniques & Tools for Online Fundraising:

# Form Creation



Contents View Edit Rules Sharing History

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Comments

Subject

Submit

- Boolean Field
- Custom Script Adapter
- Date/Time Field
- Fieldset Folder
- File Field
- Fixed-Point Field
- Image
- Integer Field
- Label Field
- Lines Field
- Mailer Adapter
- Multi-Select Field
- Page
- Password Field
- Rating-Scale Field
- Rich Label Field
- RichText Field
- Salesforce Adapter
- Save Data Adapter
- Selection Field
- String Field
- Text Field
- Thanks Page
- Restrictions...

A red arrow points from the 'Submit' button in the form to the 'String Field' option in the 'Add new...' dropdown menu.

- Featured Sites
- Latest News

your cart

Contains 2 Items

- Manage Cart
- Checkout

## case studies

INVESTORS' CIRCLE

A screenshot of the Investors Circle website, showing a navigation menu and a main content area with a photo of people silhouetted against a sunset.

**Investors Circle**  
Serving the needs of members of the investor network and applicants for investments, the site enables collaboration, community, and management of the application system.

More Success Stories

## trainings & webinars

- Developing a Social Media Strategy: Summer Workshop Series
- Techniques & Tools for Online Fundraising:



# Form Creation



Industries

Solutions

Customers

Technology

Learn



## Add String Field

A string entry field

Default ▾ Overrides

### Short Name

Should not contain spaces, underscores or mixed case. Short Name is part of the item's web address.

### Field Label ▾

### Field Help

Required

Hidden

 go

- ▶ Contact Us
- ▶ Who We Are
- ▶ What We do
- ▶ Featured Sites
- ▶ Latest News

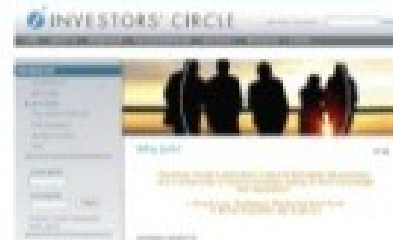
your cart

Contains 2 Items

Manage Cart

Checkout

## case studies



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More Success Stories

# Form Creation



- [Contact Us](#)
- [Who We Are](#)
- [What We do](#)
- [Featured Sites](#)
- [Latest News](#)

## Add String Field

A string entry field

**Default** ▾ Overrides

### Short Name

Should not contain spaces, underscores or mixed case. Short Name is part of the item's web address.

### Field Label ▾

### Field Help

Required

Hidden

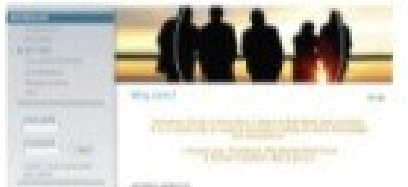
your cart

Contains 2 Items

- [Manage Cart](#)
- [Checkout](#)

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[INVESTORS' CIRCLE](#)



### Investors Circle

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[More Success Stories](#)



# Form Creation



## Add String Field

A string entry field

Default ▾ Overrides

### Short Name

Should not contain spaces, underscores or mixed case. Short Name is part of the item's web address.

firstname

### Field Label ▾

First Name

### Field Help

Required

Hidden

[go](#)

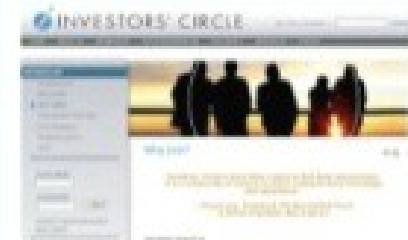
- ▶ [Contact Us](#)
- ▶ [Who We Are](#)
- ▶ [What We do](#)
- ▶ [Featured Sites](#)
- ▶ [Latest News](#)

your cart

Contains 2 Items

- ▶ [Manage Cart](#)
- ▶ [Checkout](#)

## case studies



### Investors Circle

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▶ [More Success Stories](#)



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[Industries](#)

[Solutions](#)

[Customers](#)

[Technology](#)

[Learn](#)



## Add String Field

A string entry field

**Default** ▀ **Overrides**

### Short Name

Should not contain spaces, underscores or mixed case. Short Name is part of the Item's web address.

firstname

### Field Label ▀

First Name

### Field Help

Required

Hidden



- ▶ [Contact Us](#)
- ▶ [Who We Are](#)
- ▶ [What We do](#)
- ▶ [Featured Sites](#)
- ▶ [Latest News](#)

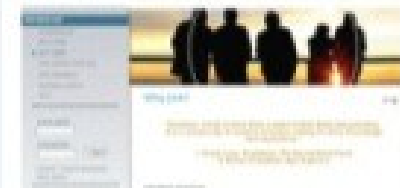
your cart

Contains 2 Items

- ▶ [Manage Cart](#)
- ▶ [Checkout](#)

## case studies

### INVESTORS' CIRCLE



### Investors Circle

Serving the needs of members of the investor network and applicants for investments, the site enables collaboration, community, and management of the application system.

▶ [More Success Stories](#)

# Form Creation

Transstate Info... Accounts Add Item... Status: PRIVATE

Info Changes saved.

### Online Fundraising Workshop

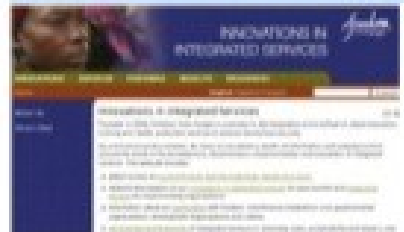
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Field	Delete	Edit	Order
Subject ■ <input type="text"/>	X		::
First Name ■ <input type="text"/>	X		::
Last Name ■ <input type="text"/>	X		::
Company ■ <input type="text"/>	X		::
Email ■ <input type="text"/>	X		::
Comments ■ <input type="text"/>			

Contains 2 Items

- Manage Cart
- Checkout

### case studies



**Freedom from Hunger**  
An intranet that enables international partners to work together, staff to manage document production processes in three languages, and a public area for one of the Web's best collection of microfinance information.

- More Success Stories

### trainings & webinars

- Developing a Social Media Strategy: Summer Workshop Series
- Techniques & Tools for Online Fundraising: Summer Workshop Series
- More...

Manage outlets

# Form Creation

Info Changes saved.

## Online Fundraising Workshop

Did you know that online donor growth increased 33% in 2005 and 2006? Or that statistics prove that people give more money online than ever, and that 70% of donors are just two reasons why online fundraising is growing so fast, especially to small- to mid-sized nonprofits. This summer explores the ins and outs of raising money online, different strategies for online fundraising, how to frame your online ask to attract donors, and how to use social networking sites or charity malls to increase your reach. If your organization is interested in improving its ability to raise money online, this workshop is for you.

Field

Subject

First Name

Last Name

Company

Email


Comments

- Boolean Field
- Custom Script Adapter
- Date/Time Field
- Fieldset Folder
- File Field
- Fixed-Point Field
- Image
- Integer Field
- Label Field
- Lines Field
- Mailer Adapter
- Multi-Select Field
- Page
- Password Field
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- Rich Label Field
- RichText Field
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- Save Data Adapter
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Contains 2 Items

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### case studies



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- More...

Manage portlets

# Form Creation



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[Customers](#)

[Technology](#)

[Learn](#)



## Add Salesforce Adapter

[\[default\]](#) [\[field mapping\]](#) [\[overrides\]](#)

An adapter for PioneFormGen that saves results to Salesforce.

### Short Name

Should not contain spaces, underscores or mixed case. Short Name is part of the item's web address.

leads

### Title

Fundraising Leads

### Salesforce Object Type

Contact

[Next](#)

[Save](#)

[Cancel](#)

- [Contact Us](#)
- [Who We Are](#)
- [What We do](#)
- [Featured Sites](#)
- [Latest News](#)

your cart

Contains 2 Items

- [Manage Cart](#)
- [Checkout](#)

## case studies



### Freedom from Hunger

An intranet that enables international partners to work together, staff to manage document production processes in three languages, and a public area for one of the Web's best collection of microfinance information.

# Form Creation

Industries

Solutions

Customers

Technology

Learn

- Contact
- Contract
- ContractContactRole
- ContractStatus
- Document
- EmailMessage
- EntityHistory
- Event
- EventAttendee
- FiscalYearSettings
- Folder
- Group
- GroupMember
- Lead**
- LeadShare
- LeadStatus
- MailmergeTemplate
- Mass\_Update\_Criteria\_\_c
- Mass\_Update\_Field\_\_c
- Mass\_Update\_Test\_\_c



- Contact Us
- Who We Are
- What We do
- Featured Sites
- Latest News

your cart

Contains 2 Items

- Manage Cart
- Checkout

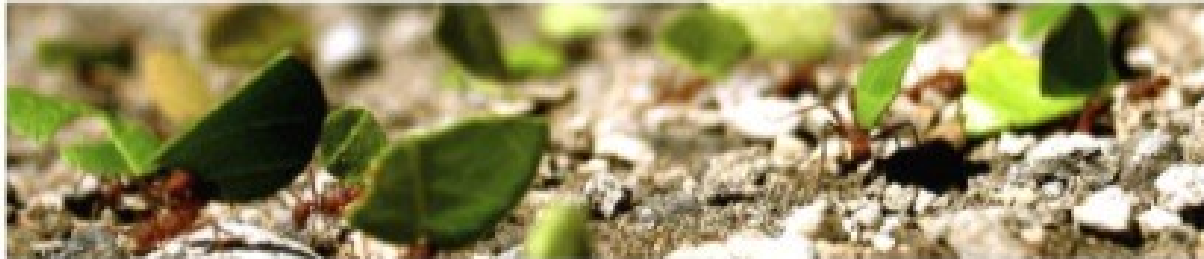
case studies



**Freedom from Hunger**  
An intranet that enables international partners to work together, staff to manage document production processes in three languages, and a public area for one of the Web's best collection of microfinance information.



# Form Creation

- ▣ [Contact Us](#)
- ▣ [Who We Are](#)
- ▣ [What We do](#)
- ▣ [Featured Sites](#)
- ▣ [Latest News](#)

## Add Salesforce Adapter

[\[default\]](#) [\[field mapping\]](#) [\[overrides\]](#)

An adapter for PioneFormGen that saves results to Salesforce.

### Short Name

Should not contain spaces, underscores or mixed case. Short Name is part of the item's web address.

leads

### Title

Fundraising Leads

### Salesforce Object Type

Lead

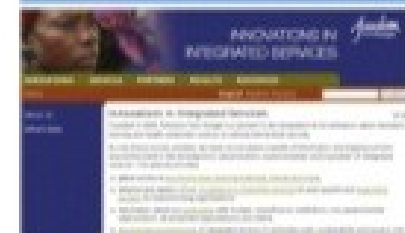


## your cart

Contains 2 Items

- ▣ [Manage Cart](#)
- ▣ [Checkout](#)

## case studies



### Freedom from Hunger

An intranet that enables international partners to work together, staff to manage document production processes in three languages, and a public area for one of the Web's best collection of microfinance information.

# Form Creation



Industries

Solutions

Customers

Technology

Learn



## Add Salesforce Adapter

[\[default\]](#) [\[field mapping\]](#) [\[overrides\]](#)

An adapter for PioneFormGen that saves results to Salesforce.

### Form fields to Salesforce fields mapping

The following Form Fields are available within your Form Folder. Choose the appropriate Salesforce Field for each Form Field.

Form Fields

Salesforce Fields

Subject

First Name

Last Name

Company

Email

Comments

### Configure Parent Adapters

This form's other Salesforce Adapters are listed below. To relate the current adapter's Salesforce record to the Salesforce record created by another Salesforce Adapter, select the field that relates both records. Note: relationships are made from children back to parents.

Possible Parent Adapters

Available Field IDs

Fundraising Leads

 go

- Contact Us
- Who We Are
- What We do
- Featured Sites
- Latest News

your cart

Contains 2 Items

- Manage Cart
- Checkout

case studies



### Investors Circle

Serving the needs of members of the investor network and applicants for investments, the site enables collaboration, community, and management of the application system.

More Success Stories

# Form Creation

Industries

Solutions

Customers

Technology

Learn

 go

- Company (required)
- LastName (required)
- AnnualRevenue
- City
- ConvertedAccountId
- ConvertedContactId
- ConvertedDate
- ConvertedOpportunityId
- Country
- CreatedById
- CreatedDate
- Data\_Quality\_Description\_\_c
- Data\_Quality\_Score\_\_c
- Department\_\_c
- Description
- Email
- FirstName**
- HasOptedOutOfEmail
- Id
- Industry

View

Edit

Edit Salesforce Ad

[default] [field map]  
An adapter for PhoneForm

**Form fields to Sales**  
The following Form Fields  
each Form Field.

Form Fields

Subject

First Name

Last Name

Company

Email

Comments



**Configure Parent Adapters**

This form's other Salesforce Adapters are listed below. To relate the current adapter's Salesforce record to the

- Contact Us
- Who We Are
- What We do
- Featured Sites
- Latest News

online fundraising workshop

Fundraising Leads

your cart

Contains 2 Items

- Manage Cart
- Checkout

case studies



**Center for Community Change**  
Case study of the nonprofit CCC and how they saved thousands

# Form Creation



Industries Solutions Customers Technology Learn



View Edit Properties Sharing Sharing

## Edit Salesforce Adapter

[default] [field mapping] [overrides]

An adapter for PioneFormGen that saves results to Salesforce.

### Form fields to Salesforce fields mapping

The following Form Fields are available within your Form Folder. Choose the appropriate Salesforce Field for each Form Field.

Form Fields	Salesforce Fields
Subject	<input type="text"/>
First Name	<input type="text" value="FirstName"/>
Last Name	<input type="text"/>
Company	<input type="text"/>
Email	<input type="text"/>
Comments	<input type="text"/>

### Configure Parent Adapters

This form's other Salesforce Adapters are listed below. To relate the current adapter's Salesforce record to the

- Contact Us
- Who We Are
- What We do
- Featured Sites
- Latest News

online fundraising workshop

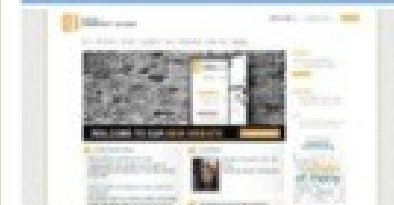
### Fundraising Leads

your cart

Contains 2 Items

- Manage Cart
- Checkout

### case studies



Center for Community Change  
Case study of the nonprofit CCC and how they saved thousands



# Form Creation



if PEOPLE

[about](#) | [client support](#) | [fairsource](#) | [careers](#)

Industries

Solutions

Customers

Technology

Learn



View

Edit

Properties

Sharing

Sharing

## Edit Salesforce Adapter

[default] [field mapping] [overrides]

An adapter for PhoneFormGen that saves results to Salesforce.

### Form fields to Salesforce fields mapping

The following Form Fields are available within your Form Folder. Choose the appropriate Salesforce Field for each Form Field.

Form Fields	Salesforce Fields
Subject	<input type="text"/>
First Name	FirstName
Last Name	LastName (required)
Company	Company (required)
Email	Email
Comments	Description

### Configure Parent Adapters

This form's other Salesforce Adapters are listed below. To relate the current adapter's Salesforce record to the

go

- Contact Us
- Who We Are
- What We do
- Featured Sites
- Latest News

online fundraising workshop

### Fundraising Leads

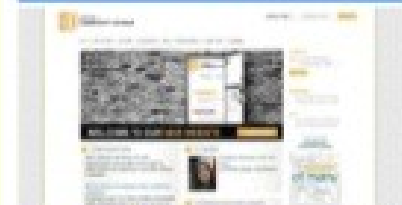
your cart

Contains 2 Items

Manage Cart

Checkout

### case studies



### Center for Community Change

Case study of the nonprofit CCC and how they saved thousands

# Form Creation

Did you know that online donor growth increased 101% between 2003 and 2006? Or that statistics prove that people give more money online than through mail? These are just two reasons why online fundraising is more important now than ever, especially to small- to mid-sized nonprofits. Our third and final workshop this summer explores the ins and outs of raising money online. You'll not only learn different strategies for online fundraising, but also how to use donor tools, how to frame your online ask to attract donors, and how to use Web 2.0 tools like social networking sites or charity malls to increase donations. This course is perfect for any organization interested in improving its ability to attract online donors.

Subject ■

First Name ■

Last Name ■

Company ■

Email ■

Comments ■

case studies



**PARSA Community Foundation**

Combining the ifDirectory product with a custom web site to build the community foundation's outreach potential and provide a unique resource to help connect the Iranian community in diaspora.

trainings & webinars

**Developing a Social Media**

**Techniques & Tools for**

Manage portlets



# E-commerce



# Client: Trees for Life

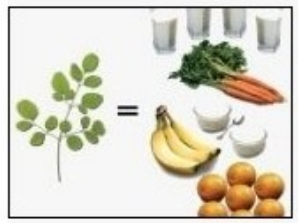


- [Our Work](#)
- [Get Involved](#)
- [Give](#)
- [Learn](#)
- [About Us](#)

## News and Updates



**There's love in your attic!**  
In February, Kansas youth shared their love by collecting nearly 50,000 used books for kids in Liberia.



**The Moringa Tree**  
These tiny leaves could save millions of lives.  
[More about Moringa](#)



**Books for Life International**  
Books for Life inspires children with the joy of

**Gifts from the heart.** [GO](#)

## 3 steps to giving:

1. Purchase an item to honor your friend.
2. Send a card to your friend.
3. Send the gift to those who need it most.

[join our email list](#)

## Watch our VIDEO



The ESSENCE of Trees for Life

## Moringa Book

# Goal: Grow online revenue



Make the giving process easier

Make tracking and reporting on giving easier

Reduce technical staff, costs of data management

# Online catalogue



You are here: Home → Give → Catalog



[Our Work](#)

[Get Involved](#)

[Give](#)

[Learn](#)

[About Us](#)

## Catalog of Gifts from the Heart



Here you can choose a special "Gift from the Heart" to give a loved one and help people around the world improve their own lives.

Click on a gift idea below to find out how your gift will help people.

Then follow the simple **2-part process**:

1. **Complete the payment process for your donation.**
2. **Then create a customized email or printable gift card.**

[View Cart](#)



[Life Giving Trees](#)



[Books](#)  
[Open Doors for Children](#)



[Moringa:](#)  
[The Miracle Tree](#)



Search Site  [go](#)



Gifts from the heart. [GO](#)

[join our email list](#)

Secure Site

<http://www.treesforlife.org>  
has been validated and is secure  
for online transactions.



# Shopping cart & additional donations

[Our Work](#)[Get Involved](#)[Give](#)[Learn](#)[About Us](#)

## Your Shopping Cart

### Your Cart Contents

	Quantity	Name	Price	Total
<input type="checkbox"/>	1	Moringa: The Miracle Tree	25.00	25.00

Subtotal	25.00
Shipping	N/A
Tax	N/A
Total US\$	25.00

[Delete](#) [Update](#)

### Additional Donation

If you would like to make an additional donation to support Trees for Life, enter the amount here.

US\$  [Donate](#)

### Next Steps

[Continue Shopping](#) [Checkout](#)

Gifts from the heart. [GO](#)

 [join our email list](#) 

Secure Site

<http://www.treesforlife.org>  
has been validated and is secure  
for online transactions.

# Checkout



You are here: Home → Give → Catalog



- [Our Work](#)
- [Get Involved](#)
- [Give](#)
- [Learn](#)
- [About Us](#)

## Checkout

### Contact Information

**Your Name**

**Phone Number**

Only digits allowed - e.g. 3334445555 and not 333-444-5555

**Email**

Contact Information

### Billing Address

**Full Name**

**Address 1**

**Address 2**

**City**

**Country**

**State**

### Mailing Address

Same as billing address

**Full Name**

**Address 1**

**Address 2**

**City**

**Country**

Gifts from the heart. [GO](#)

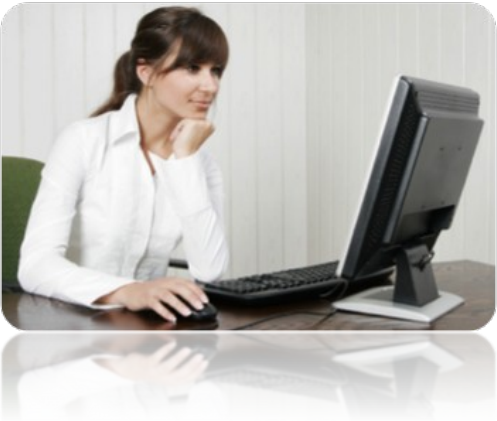
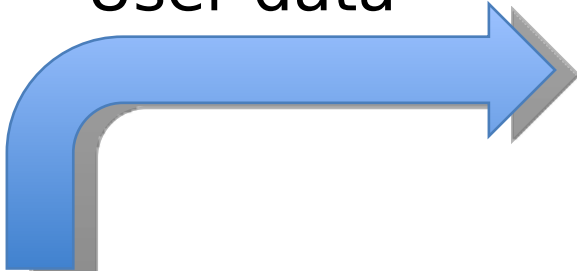
[join our email list](#)

Secure Site

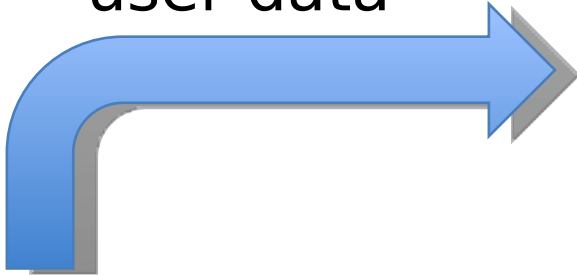
<http://www.treesforlife.org>  
has been validated and is secure for  
online transactions.



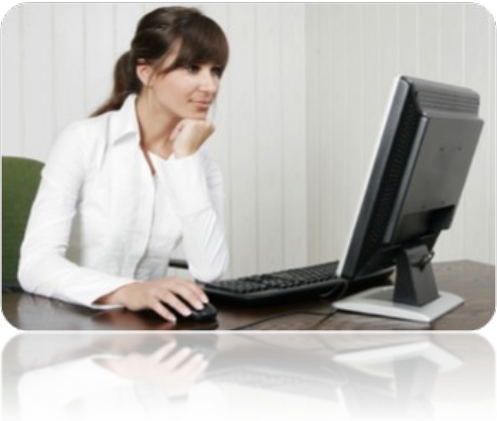
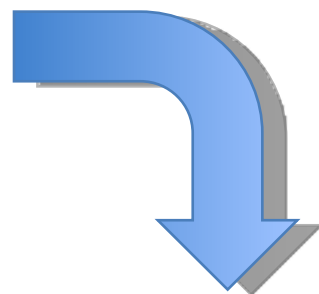
User data



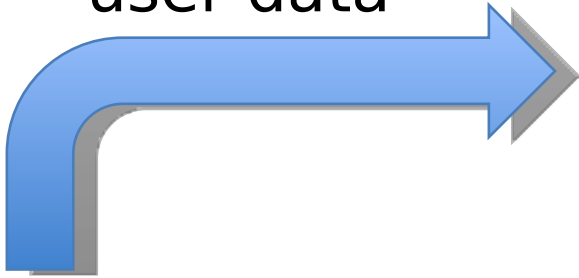
user data



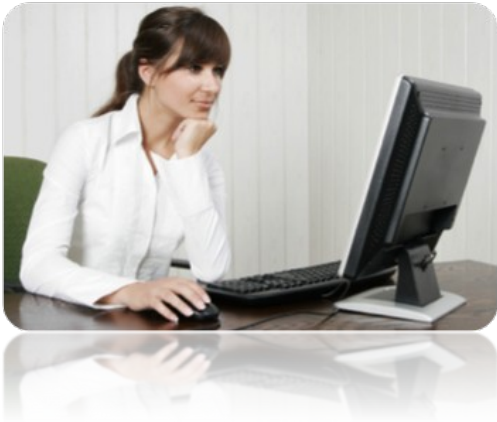
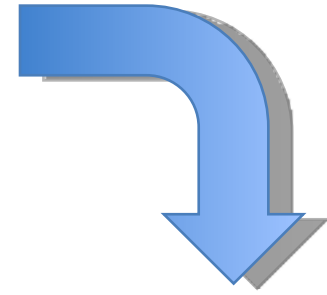
Plone®



user data



Plone®

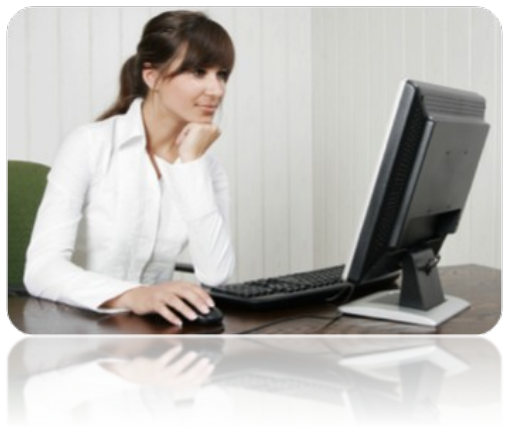
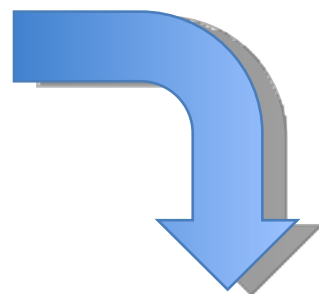
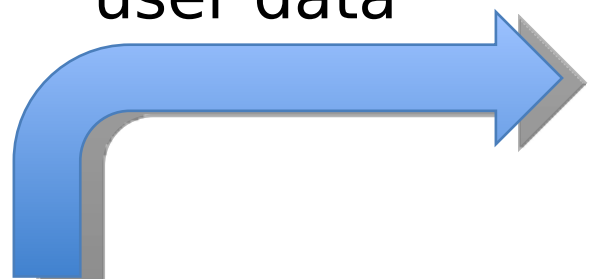


order



payment

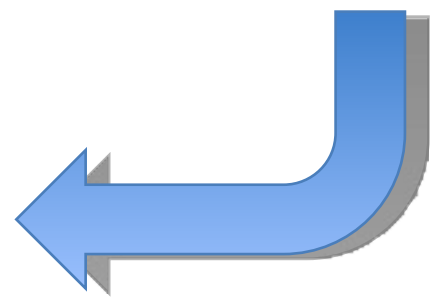
user data



order

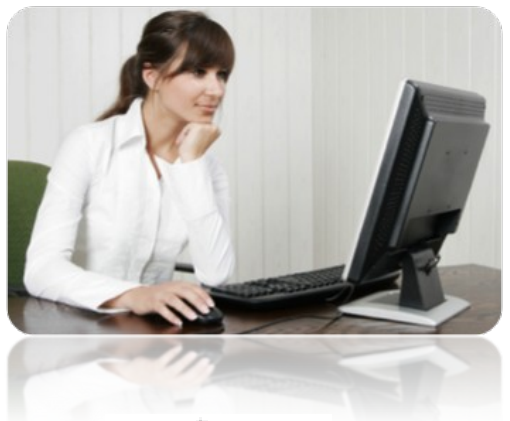
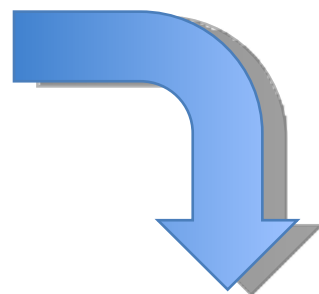
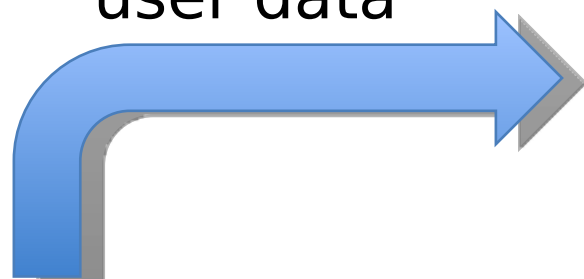


payment



- contact
- opportunity
- donation details

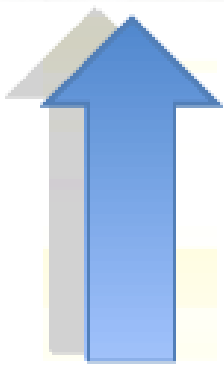
user data



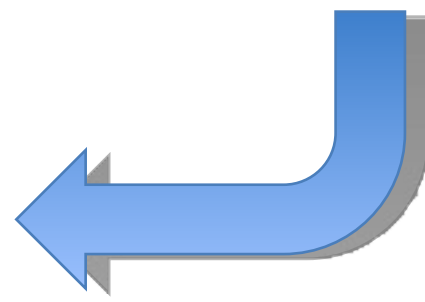
order




payment



- contact
- opportunity
- donation details



# Contact record with donation

The power of  Setup · System Log · Help & Training · Logout force.com apps Nonprofitforce

Home **Contacts** Organizations Households Campaigns Donations Pledges Recurring Donations Reports Documents VR Email VR Statistics Program Designations Product Details

**Search**

Organizations


Limit to items I own

Advanced Search...

Create New...

**Recent Items**

- Nancy
- Gifts from the Heart
- Nancy Donation - 4/08/09
- Alan F. Donation - 4/08/09
- Alan F.
- Shelley
- Rosalind
- East Heights United Methodist
- Dellrose United Methodist Church
- Kansas Area United Methodist Foundation, Inc

 [Recycle Bin](#)

**Contact Nancy** Printable View | Customize Page | Edit Layout | Help for this Page

Back to List: [Contacts](#)

[Donations \[1\]](#) | [Pledges \[0\]](#) | [Recurring Donations \[0\]](#) | [Notes & Attachments \[0\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Campaign History \[0\]](#) | [HTML Email Status \[0\]](#)

**Donations** [Donations Help](#)

[Contact Donation](#) | [Contact Pledge Payment](#) | [Contact Donation History](#)

	Action	Donation Name	Stage (Status)	Amount	Type	Close Date
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Nancy Donation - 4/08/09	Unverified	\$150.00	One-time Donation	4/8/2009

Organization Name Individual Informal First Name

Title Gender

Department Pronunciation

Household Nancy Household Primary Contact at the Org

Donor

**Combined Names and Other Contact Info**

Household Infomal Name Nancy Balbir's Contact

Household Mailing Label Nancy Special Contact For

Name Board Of Trustees Role

**Phone Fax Email**

Work Phone Email nancy@

Phone Extension Email 2

Mobile Email Opt Out

Home Phone Do Not Email

Other Phone Email 2 Do Not Use

Fax Mail Status  No Mail

Preferred Phone Do Not Call

Personal Website

**Mailing Information**

Mailing Address Type Primary Home "Other" Address Type

Mailing Addr Type Other "Other" Addr Type Specify



# Donation details

The power of **us** Setup · System Log · Help & Training · Logout force.com apps Nonprofitforce

Home | Contacts | Organizations | Households | Campaigns | **Donations** | Pledges | Recurring Donations | Reports | Documents | VR Email | VR Statistics | Program Designations | Product Details

---

**Search**

Organizations

Limit to items I own

[Advanced Search...](#)

**Create New...**

---

**Recent Items**

- [Nancy Siver Donation - 4/08/09](#)
- [Nancy Siver](#)
- [Gifts from the Heart](#)
- [Alan F. Donation - 4/08/09](#)
- [Alan F.](#)
- [Shelley](#)
- [Rosalind](#)
- [East Heights United Methodist](#)
- [Dellrose United Methodist Church](#)
- [Kansas Area United Methodist Foundation, Inc](#)

[Recycle Bin](#)

**Donation**  
Nancy Siver Donation - 4/08/09 [Printable View](#) | [Customize Page](#) | [Edit Layout](#) | [Help for this Page](#)

[Back to List: Contacts](#)

[TFL Opportunity Details \[2\]](#) | [Contact Roles \[1\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#) | [Opportunity Field History \[1\]](#)

**TFL Opportunity Details** [New TFL Opportunity Details](#) | [TFL Opportunity Details Help](#)

Action	Record ID	"Product"	Line Amount	Quantity
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">P44641</a>	Life Giving Trees	\$50.00	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">P44642</a>	Moringa Tree	\$100.00	

Primary Contact [Nancy Siver](#)

Organization Name

**Donation Details**

Primary Campaign Source <a href="#">Gifts from the Heart</a>	Pledge
Program Designation	Recurring Donation
	Matching Gift Orig Contact <a href="#">?</a>
	Campaign From Recurring Donation
	Program Designation Frm Recurring Donatn

**Payment and Accounting Details**

Payment Type <a href="#">Credit Card</a>	Account Code <a href="#">?</a>
Check Number	Fund
Check Date	

**Description Information**


Description

**System Information**

Created By <a href="#">Trees for Life</a> 4/8/2009 11:08 AM	Access Orig ID
Last Modified By <a href="#">Trees for Life</a> 4/8/2009 11:08 AM	Access Created Date
Donation Owner <a href="#">Trees for Life</a> <a href="#">[Change]</a>	Access Organization ID
Campaign To Use <a href="#">Gifts from the Heart</a>	Access People ID
Delete This Record Because	Probability (%) 0%

"Other" Amount (From Web) [?](#)

# Web donations create campaign reports

The power of  Setup · System Log · Help & Training · Logout force.com apps Nonprofitforce

Home | Contacts | Organizations | Households | **Campaigns** | Donations | Pledges | Recurring Donations | Reports | Documents | VR Email | VR Statistics | Program Designations | Product Details

**Search**

Organizations


Limit to items I own


Advanced Search...

Create New...

**Recent Items**

- Gifts from the Heart
- Nancy Sawyer
- Nancy Sawyer Donation - 4/08/09
- Alan F. [redacted] Donation - 4/08/09
- Alan F. [redacted]
- Shelley [redacted]
- Rosalind [redacted]
- East Heights United Methodist
- Dellrose United Methodist Church
- Kansas Area United Methodist Foundation, Inc

 [Recycle Bin](#)

**Campaign**  **Gifts from the Heart** [Printable View](#) | [Customize Page](#) | [Edit Layout](#) | [Help for this Page](#)

« [Back to List: Campaigns](#)

[Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Attachments \[0\]](#) | [Campaign Hierarchy \[1\]](#)

**Campaign Detail**

Campaign Name	Gifts from the Heart	Status	In Progress
Type	Website	Start Date	9/12/2008
Active	<input checked="" type="checkbox"/>	End Date	
Description	Gifts from the Heart	Program Designation	

**Additional Information**

Expected Revenue	Budgeted Cost
	Actual Cost

**Other Information**

Num Sent	0	Total Responses	0
Expected Response (%)	0.00%	Num Total Donations	906
Total Leads	0	Total Value Donations	\$41,582
Converted Leads	0	Num Won Donations	885
Total Contacts	0	Total Value Won Donations	\$40,818

**Additional Numbers and Amounts from Conversion**

Number sent Pre-Conversion	Number Received Pre-Conversion
	Amount Received Pre-Conversion

Custom Links [View All Campaign Members](#)

**System Information**

Created By	[redacted] 9/12/2008 10:24 AM	Campaign Owner	[redacted] <a href="#">[Change]</a>
Last Modified By	[redacted] 9/12/2008 10:24 AM	ID from Access	

**Open Activities**   [Open Activities Help](#)

No records to display

# Online Directory



# Client: Oregon Environmental Council



Oregon Environmental Council  
It's Your Oregon

Home | Join | Events | Media Room | Site Map

About Us **Our Work** Resources Get Involved Community



## Eco-Healthy Child Care

**Donate**

Your life

Your state

Your voice

Your OEC

En español

Para información sobre el programa Guardería Eco-Saludable en Español, haga clic aquí.

Featured Video: Eco Healthy Child Care



This spot aired on KATU-2 (Portland) by reporters Angelica Thornton and Shelle Bailey-Shah, featuring OEC's Sara Leverette. Please visit KATU.com for additional information and resources.

Updates by Email

**Our Work**

- Clean Rivers
- Global Warming Solutions
- Healthier Lives
- Tiny Footprints
- Eco-Healthy Child Care
- Find an Eco-Healthy Child Care
- Sign Up Here to Become an Eco-Healthy Child Care Provider
- National Advisory Committee
- Eco-Healthy Child Care Goes National
- El programa Guardería Eco-Saludable en Español
- Eco-Healthy Child Care Public Service Announcements
- Meet Some Eco-Healthy Child Care Providers

YOU ARE HERE Home → Our Work → Healthier Lives → Eco-Healthy Child Care → Find an Eco-Healthy Child Care

## Find an Eco-Healthy Child Care

**Total Endorsed Providers: 926**  
**Total Children Served: 38163**

To learn about all the child care options in your area, please visit [www.childcareaware.org/en](http://www.childcareaware.org/en) or call 1-800-424-2246 to contact your local Child Care Resource and Referral Agency.

Find an Eco-Healthy Child Care

State:



Map Satellite Hybrid

North Atlantic Ocean

Gulf of Mexico

México

Cuba



# Find providers on Google map

## Find an Eco-Healthy Child Care

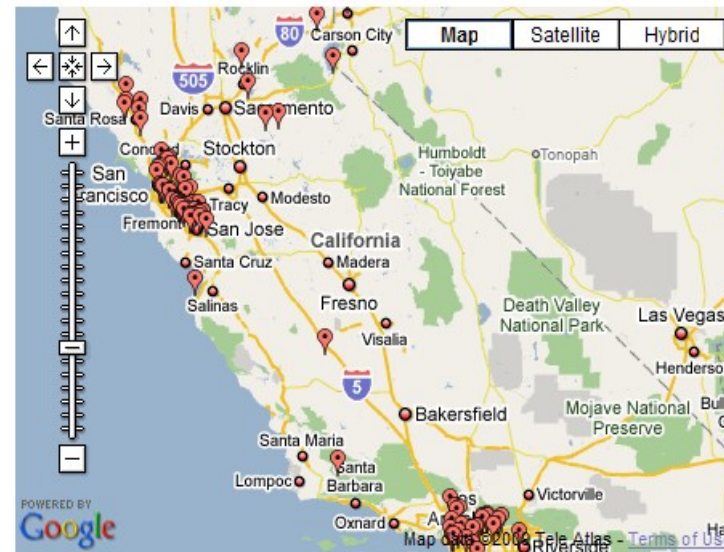
**Total Endorsed Providers: 926**  
**Total Children Served: 38163**

To learn about all the child care options in your area, please visit [www.childcareaware.org/en](http://www.childcareaware.org/en) or call 1-800-424-2246 to contact your local Child Care Resource and Referral Agency.

Find an Eco-Healthy Child Care

State:

City:



[View entire map](#)  
[Add my organization](#)

CA

**Total Endorsed Providers: 116**  
**Total Children Served: 4783**

Anderson

# New providers request certification packet



Eco-Healthy  
Child Care

[YOU ARE HERE](#) Home → Our Work → Healthier Lives → Eco-Healthy Child Care → Sign Up Here to Become an Eco-Healthy Child Care Provider

## Sign Up Here to Become an Eco-Healthy Child Care Provider

Thank you for your interest in becoming an Eco-Healthy Child Care. The Eco-Healthy Child Care program is free, simple and effective, and is available to all child care providers. Please fill out the form below to get started!

Child Care Name ■

Your First Name ■

Your Last Name ■

Business Address ■

City ■

State ■

Zip ■

Email ■

Telephone ■

How many checklists would you like? ■

If you are requesting forms for more than one child care, enter that number here.

Enter the text you see below ■

Enter the text you see below or click the audio symbol to hear the text read

RD9965A 

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# Provider info flows into Salesforce



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- [Checklist-001361](#)
- [Checklist-000026](#)
- [Checklist-000119](#)
- [Test Person](#)
- [Healthy Kids Campaign](#)
- [Holly Wolfe](#)

[Recycle Bin](#)

**EHCC Checklist Checklist-001361** Printable View | Customize Page | Edit Layout | Help for this Page ?

[← Back to List: EHCC Checklists](#) [Open Activities 101](#) | [Activity History 101](#) | [Notes & Attachments 101](#)

**EHCC Checklist Detail** [Edit](#) [Delete](#) [Clone](#) [Mark all as Yes](#)

Checklist Name	Checklist-001361	Affirmative Responses	23
Account	Jen's Childcare	Pass/Fail ?	Pass
Primary Contact	Jen [redacted]	Endorsement Start Date ?	4/3/2009
Checklist Stage ?	Endorsement Issued	Endorsement End Date ?	4/3/2011
Children Served ?	6	Approved By ?	[redacted]
Primary Contact Email ?	[redacted]	Email Opt Out ?	<input type="checkbox"/>
		Email Series Start Date	4/7/2009
		Email Series # Sent ?	

**▼ Certification Checklist**

1. Pesticides ?	Yes	14. Digital Thermometers ?	Yes
2. Excess Moisture ?	Yes	15. Batteries and Light Bulbs ?	Yes
3. Idling Vehicles ?	Yes	16. Good Furniture ?	Yes
4. Air Fresheners ?	No	17. Wood Furniture ?	Yes
5. Smoking ?	Yes	18. Wall-to-Wall Carpets ?	Yes
6. Cleaning Products ?	Yes	19. Vacuum Carpets ?	Yes
7. Chlorine Bleach ?	No	20. Art Supplies ?	Yes
8. Aerosol ?	Yes	21. Plastic Toys ?	Yes
9. Paint ?	Yes	22. Plastic in Microwave ?	Yes
10. Baby Formula Water ?	Yes	23. Playground Equipment ?	Yes
11. Built After 1978 ?	Yes	24. Recycling ?	Yes
12. Old Pottery ?	Yes	25. Covered Garbage ?	Yes
13. Wiping Feet ?	Yes		

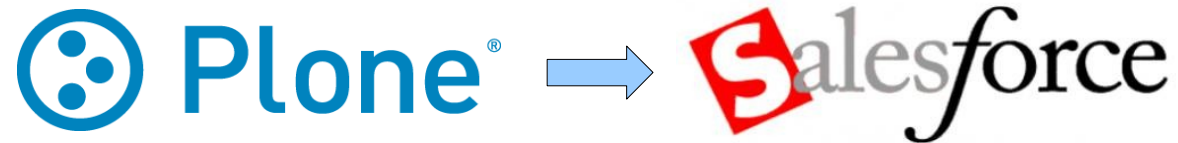
**▼ System Information**

Created By [Hester Dooley](#), 4/3/2009 9:32 AM  
 Last Modified By [Hester Dooley](#), 4/3/2009 9:34 AM

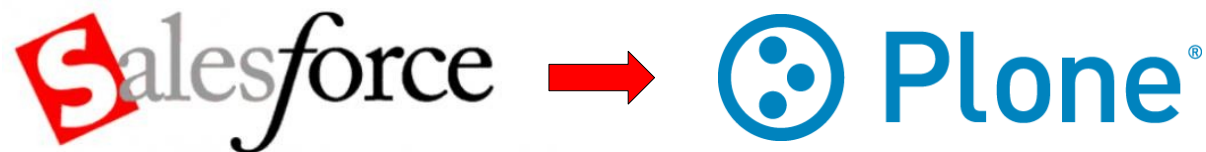
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# Skill Levels

Easy



- Web-to-x Forms
- Events RSVP
- E-commerce

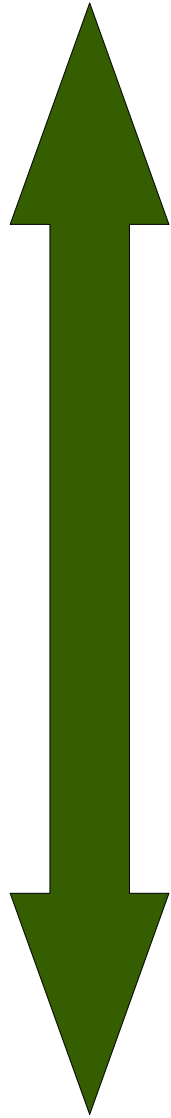


- Data from salesforce.com shown/interactive in Plone
- Login authentication

Hard

# Salesforce Service Levels

Less Features



More Features



Group



Professional



Enterprise



Unlimited

# Tools You Need



## **Salesforce Integration:**

SalesforceBaseConnector  
*Connects Plone site to SFDC  
via API login*

Specific Products  
*RSVP, SFDC PFG Adapter,  
getpaid.SalesforceOrderRecorder*

## **Plone Products:**

PloneFormGen  
*Point-and-click form creation  
tool*

PloneGetPaid  
*E-commerce engine for Plone*

# Learn More

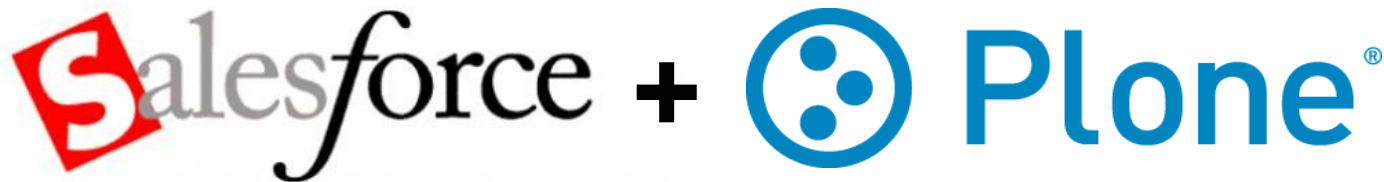


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206.286.1235



**Product Documentation:**  
[snurl.com/plonesfdoc](http://snurl.com/plonesfdoc)

**Plone-Salesforce Mailing List:**  
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