Superchaging Web Communications: Integrating Python Apps with Salesforce.com CRM

Christopher Johnson

CEO
ifPeople
www.ifpeople.net

The power of us™

if PEOPLE

innovation for people

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

Salesforce.com foundation

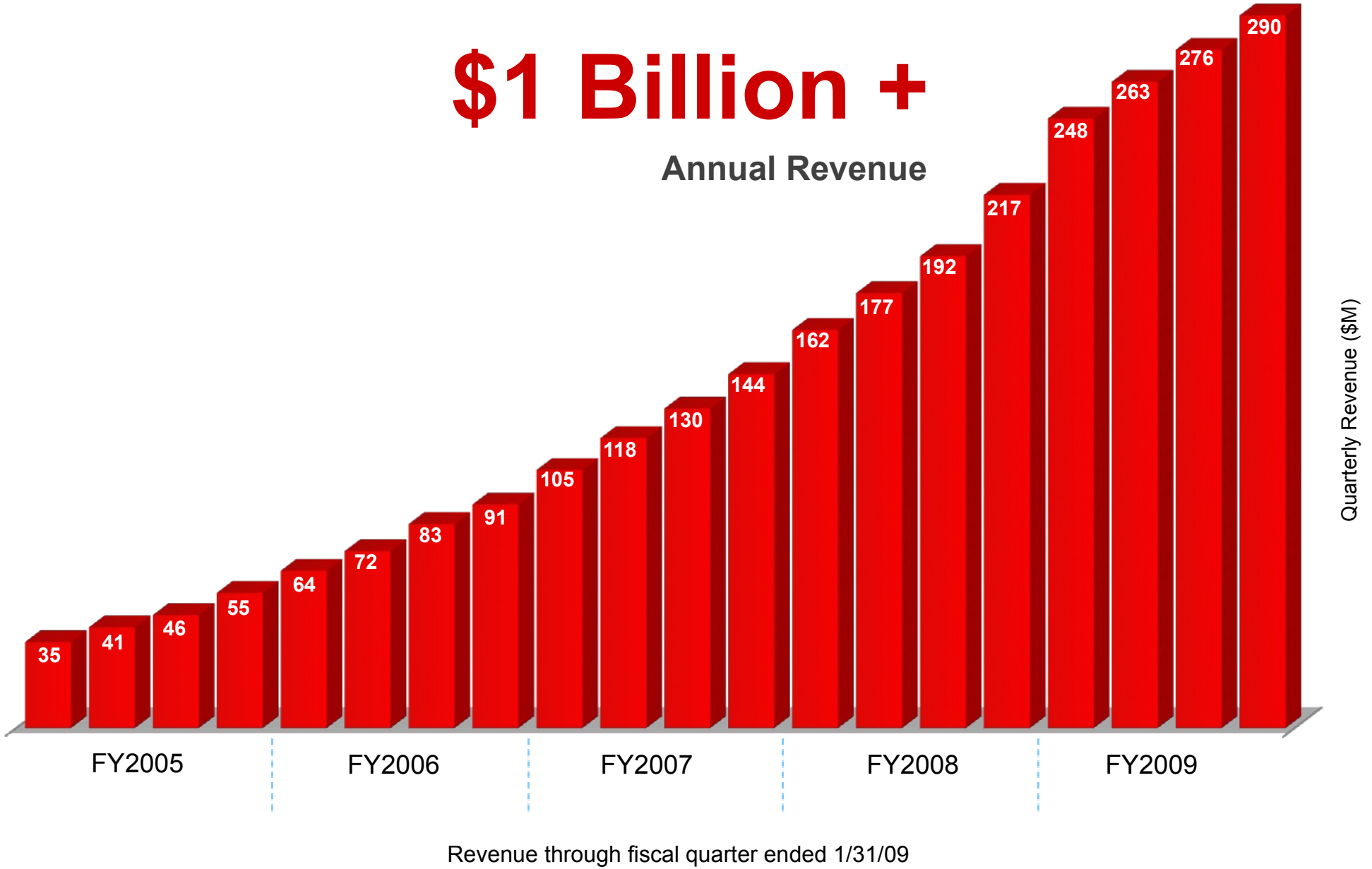
The power of us

Plone Foundation Sponsor

- 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

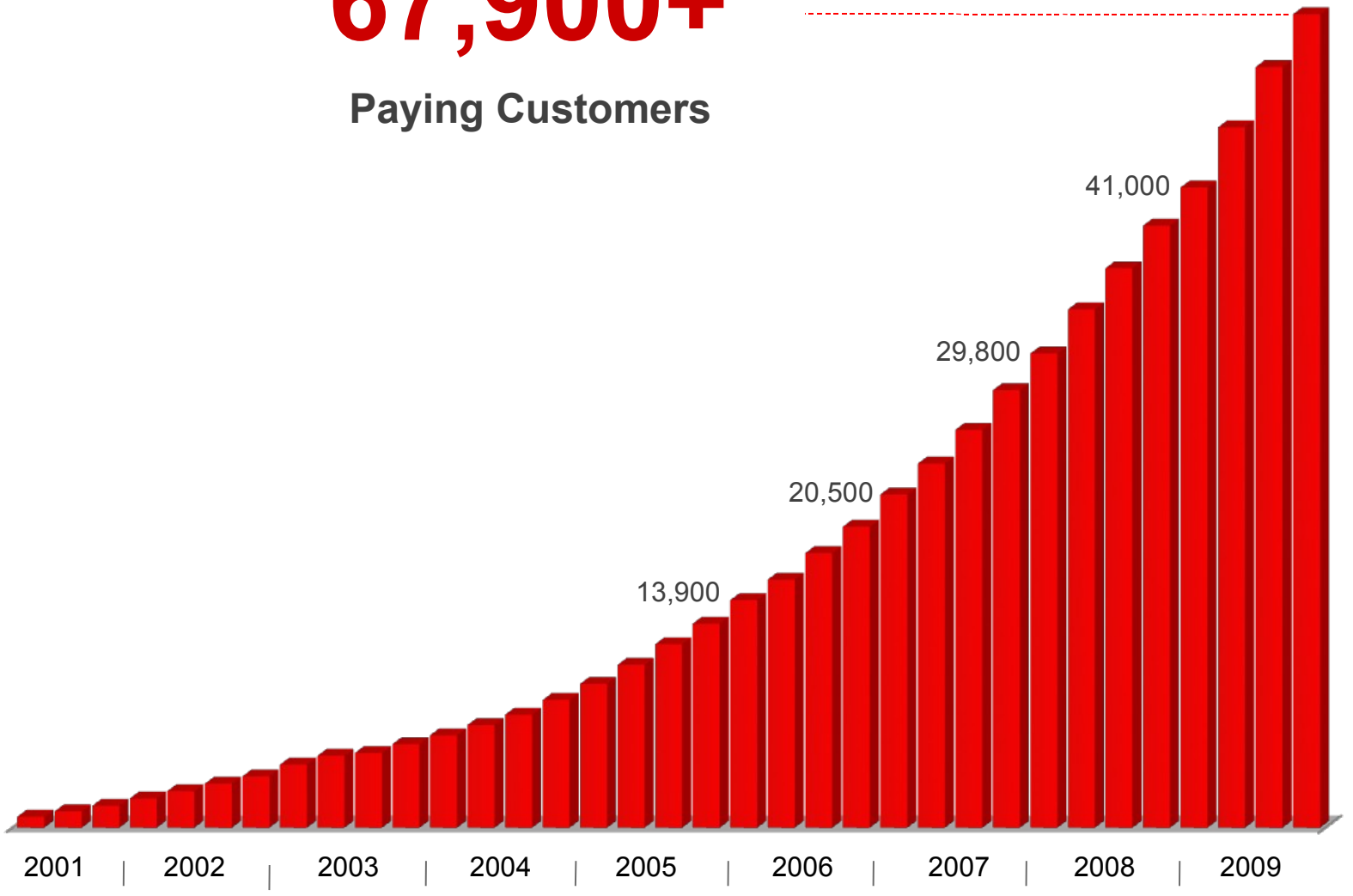


Revenue through fiscal quarter ended 1/31/09

Strong Growth in New Customers

67,900+

Paying Customers



1/1/1 Model for Strategic Corporate Philanthropy

Salesforce.com foundation®

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

1% Time
1% Equity
1% Product

goodwill

March of Dimes
Saving babies, together

WFP United Nations World Food Programme

Susan G. Komen FOR THE CURE

Habitat for Humanity®

Salesforce.com foundation®

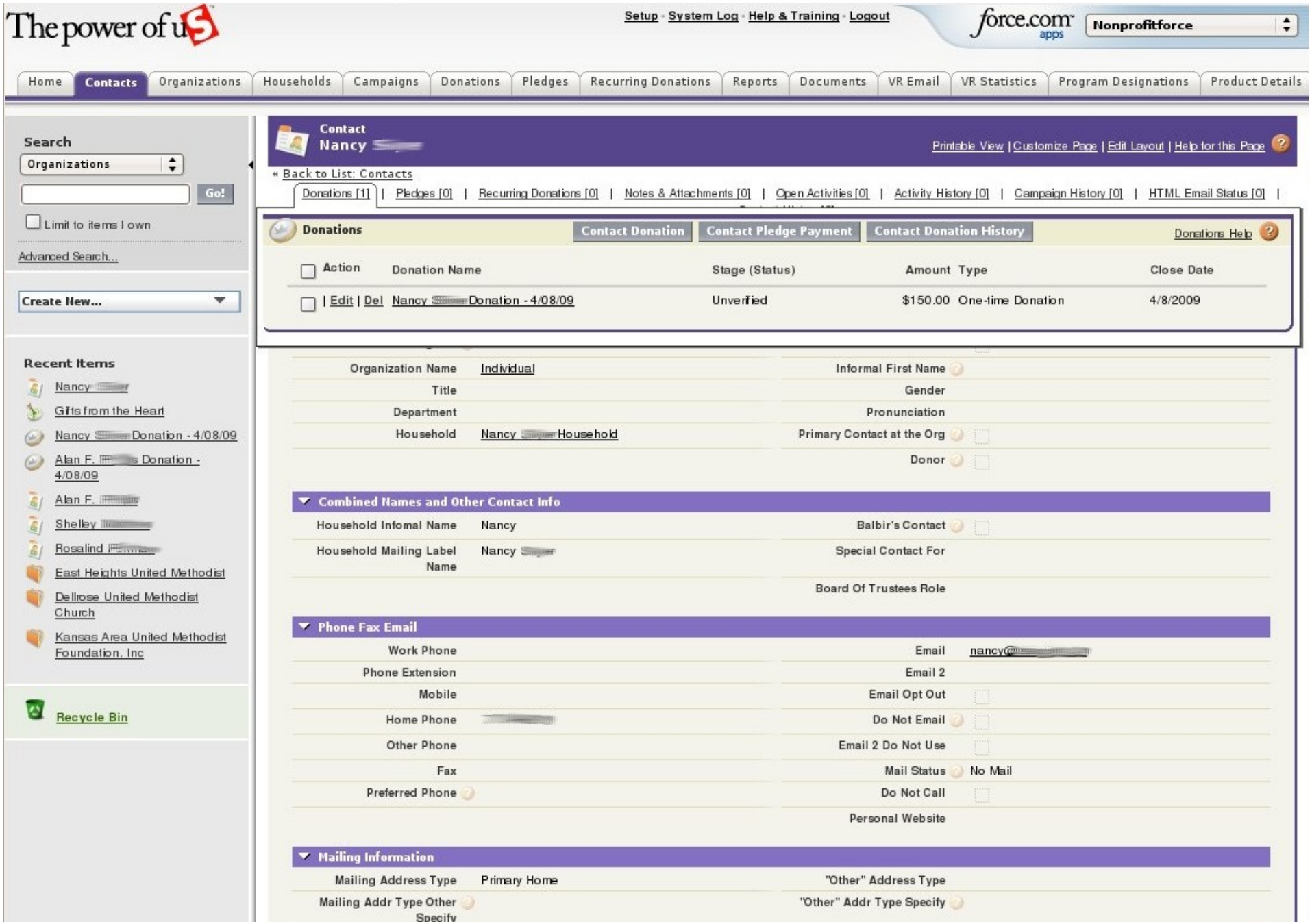
Exponential Growth and Satisfied Customers!

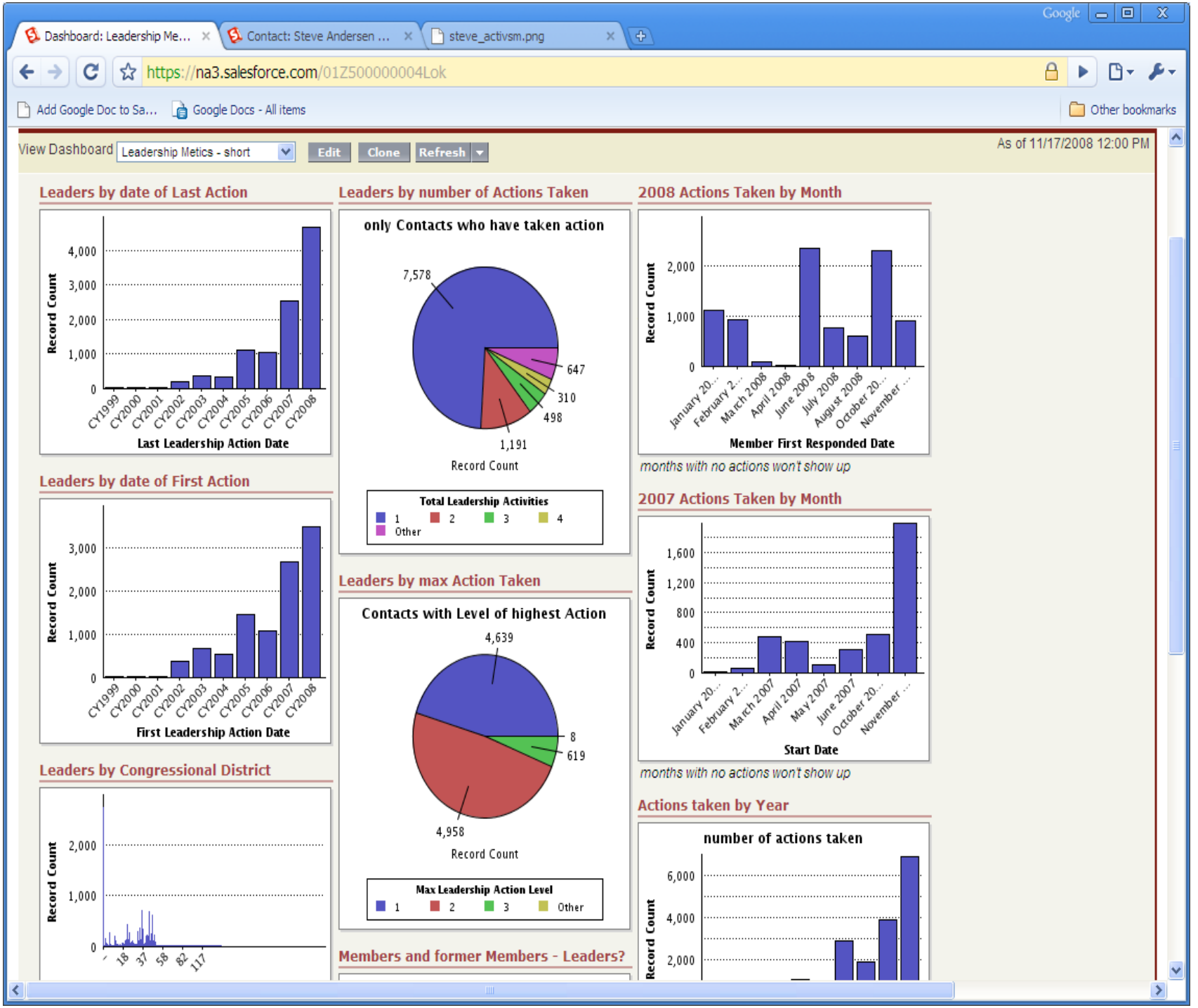
- 97% of nonprofits will continue to use
- 96% would recommend to others
- 84% already have recommended to others

Nonprofit Use Cases

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

Contact record with donation





Real-time dashboards on engagement

Setup · System Log · Help & Training · Logout

force.com apps

Respite

Home | Households | Members | Vouchers | Payments | Payment Schedule | Programs | Relationships | Exceptions | Reports | Dashboards | Documents

Dashboard
Respite

Help for this Page

« Go to Dashboard List

View Dashboard Begin typing to search for a d Edit Clone Refresh

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.

Forecasting
& Analytics
Real-Time Approvals
& Workflow
Email &
Productivity
Integrated Content
Library
Genius
Opportunities
Leads
& Campaigns
Partners
Accounts
& Contacts
AppExchange

Manage All Your Accounts & Contacts

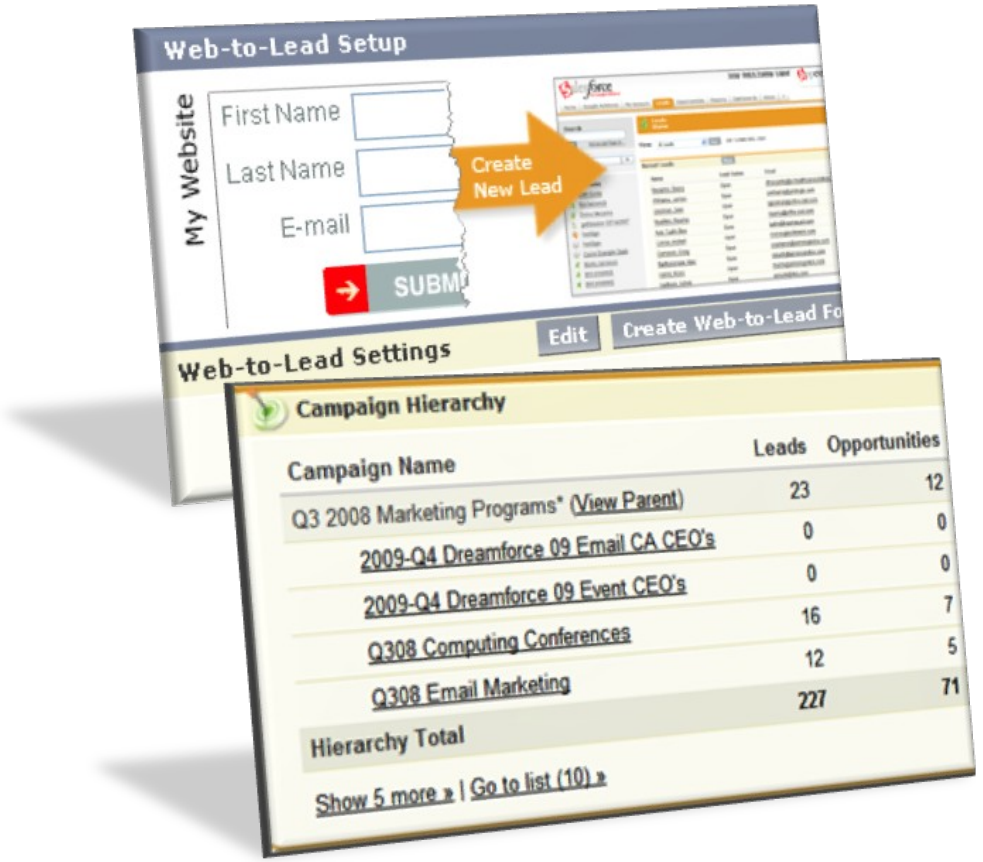
Maximize Rep Productivity

- 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."

BT

Align Marketing with Development



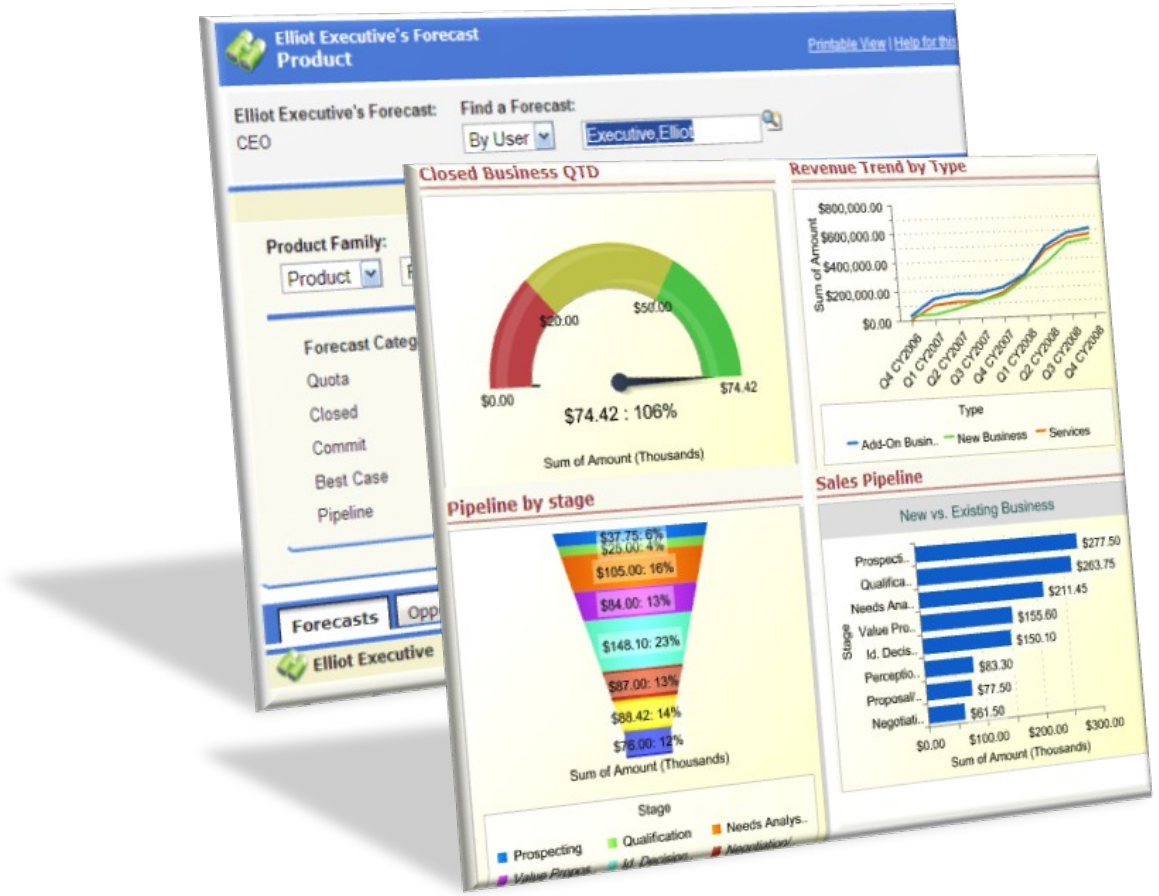
Grow the Donations Pipeline

- 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."

demandbase

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

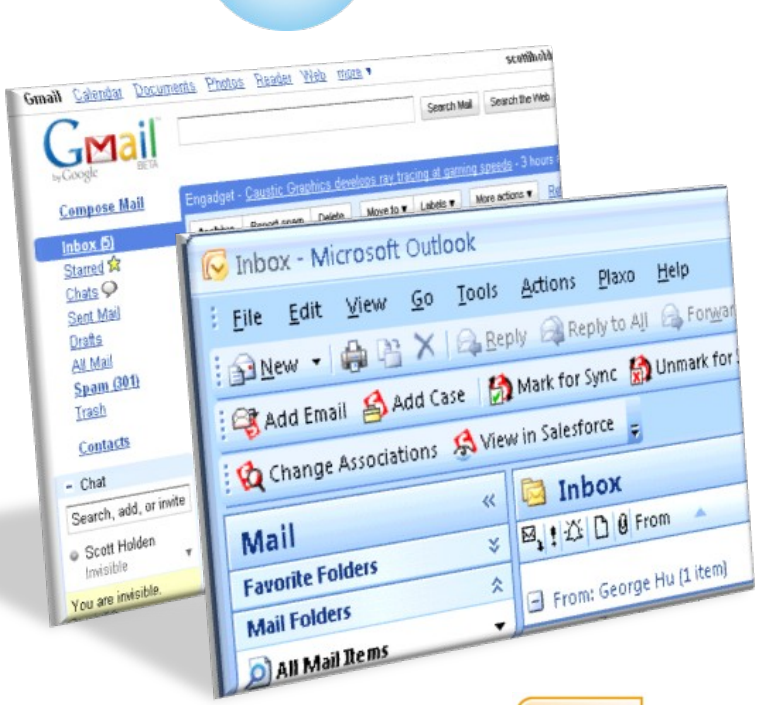
"Salesforce helped us improve our revenue visibility to less than 1% variance, **making our revenue linear and predictable.**"

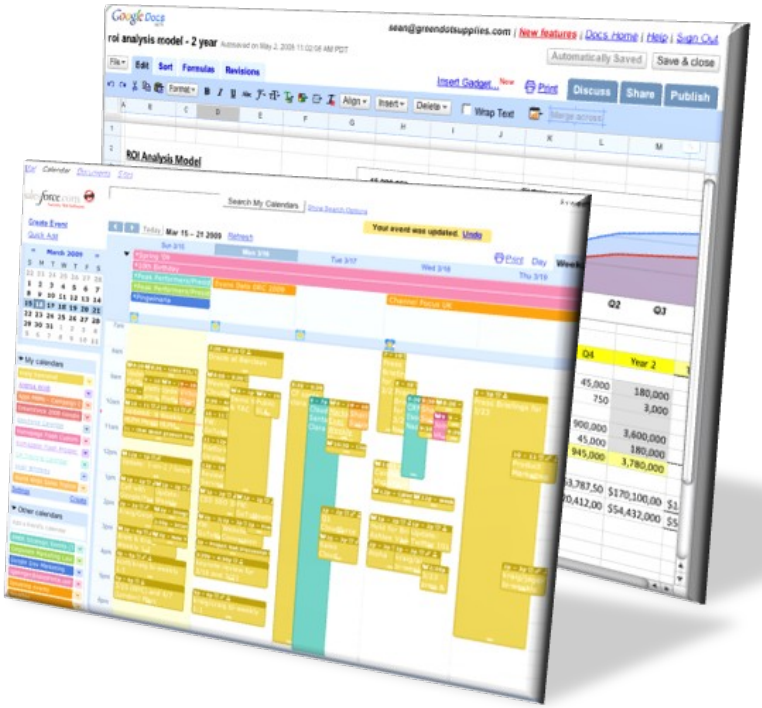
POLYCOM

Work Seamlessly with Office Productivity Apps

Spend More Time Selling

When all your desktop apps work together



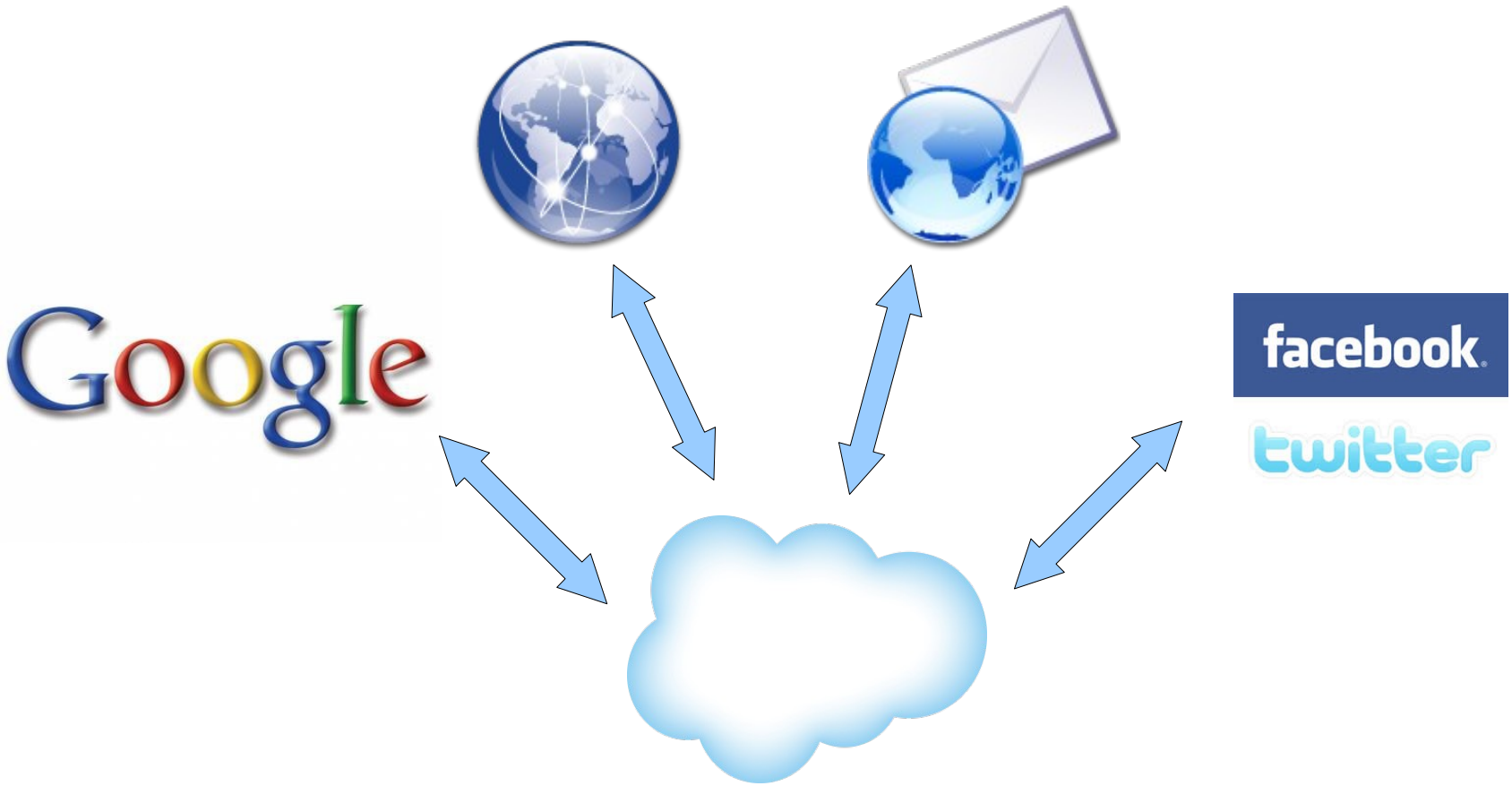


Microsoft Outlook

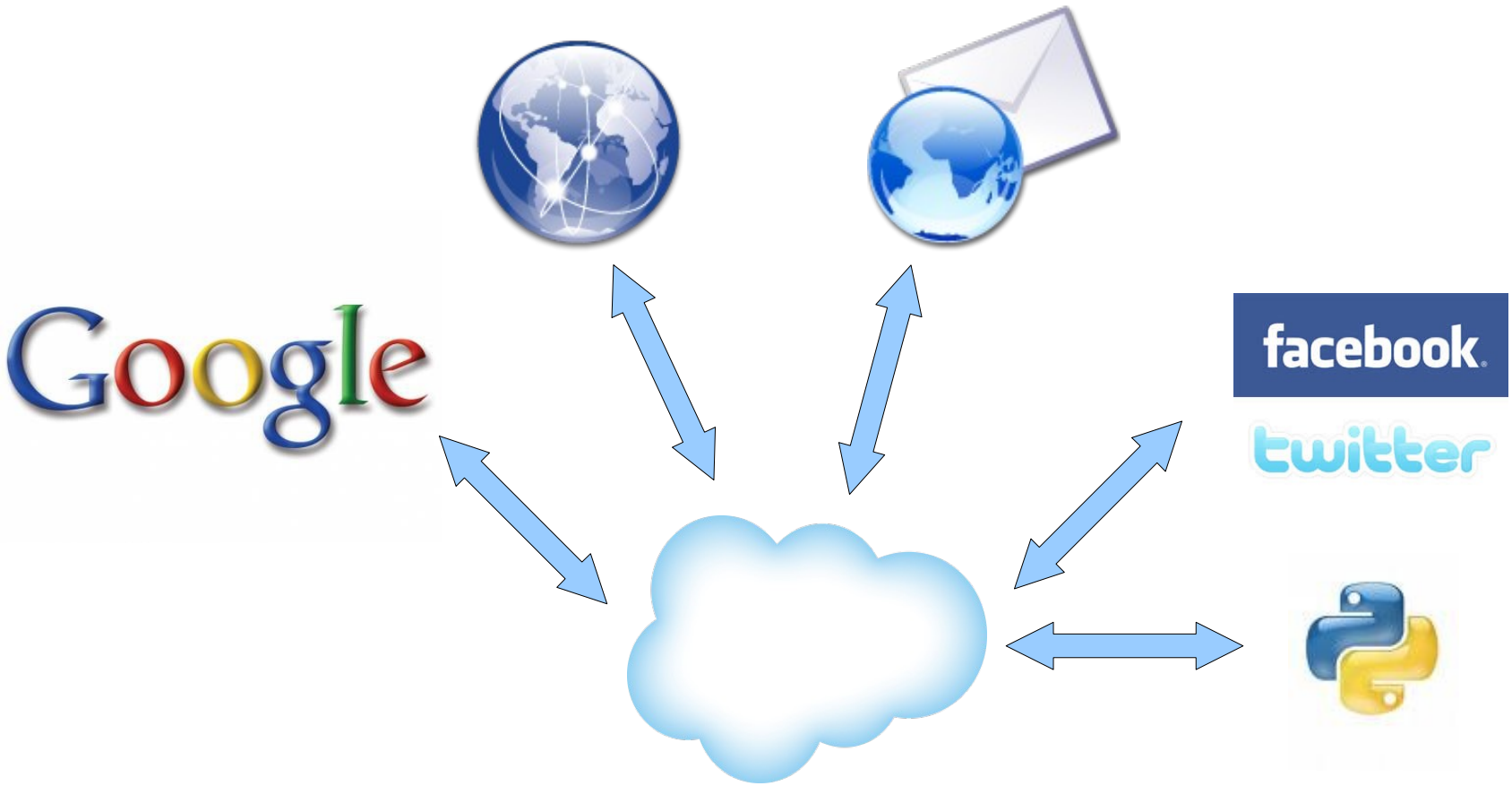
Lotus Notes

Google Apps

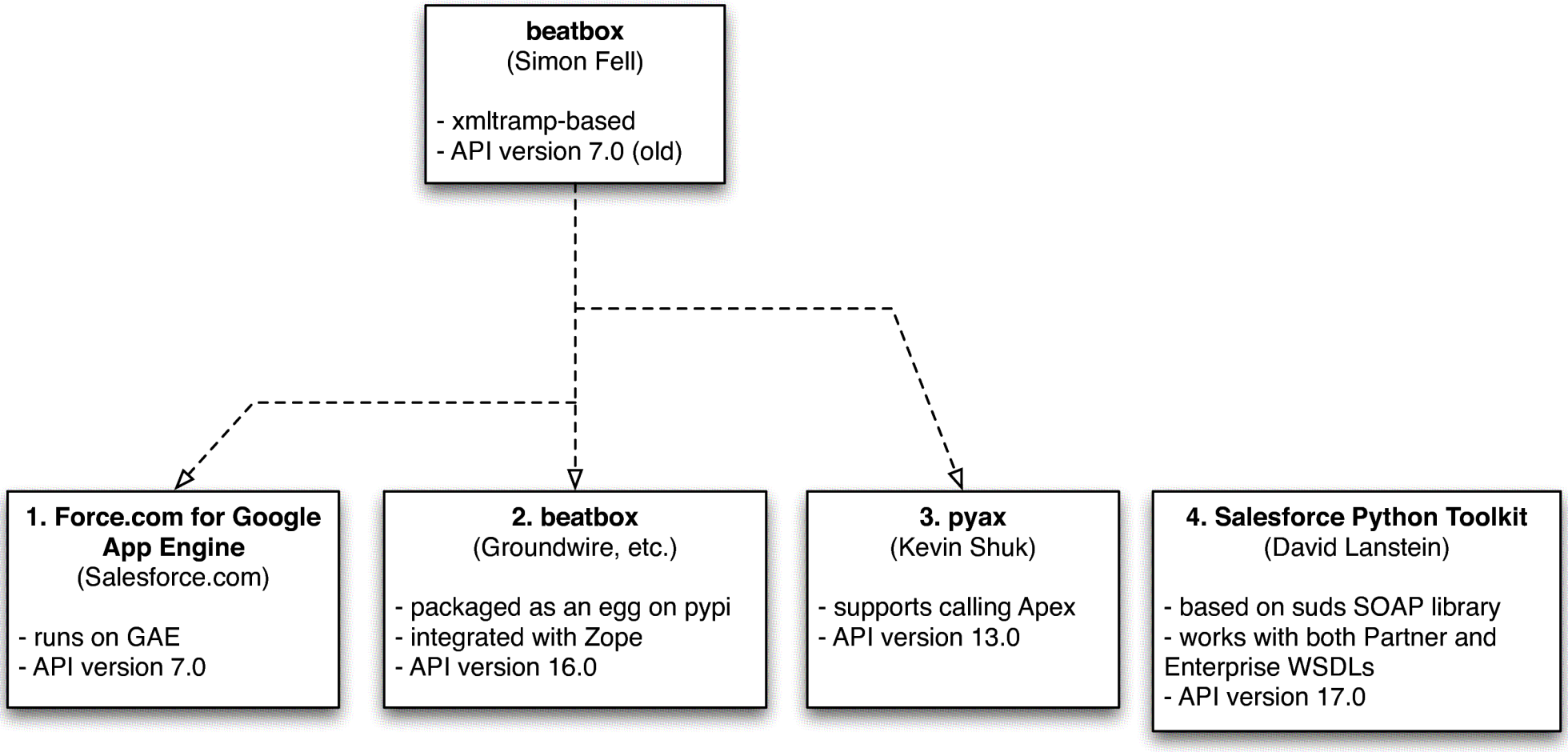
Business Systems Talk to Each Other



Super-charge Your App!

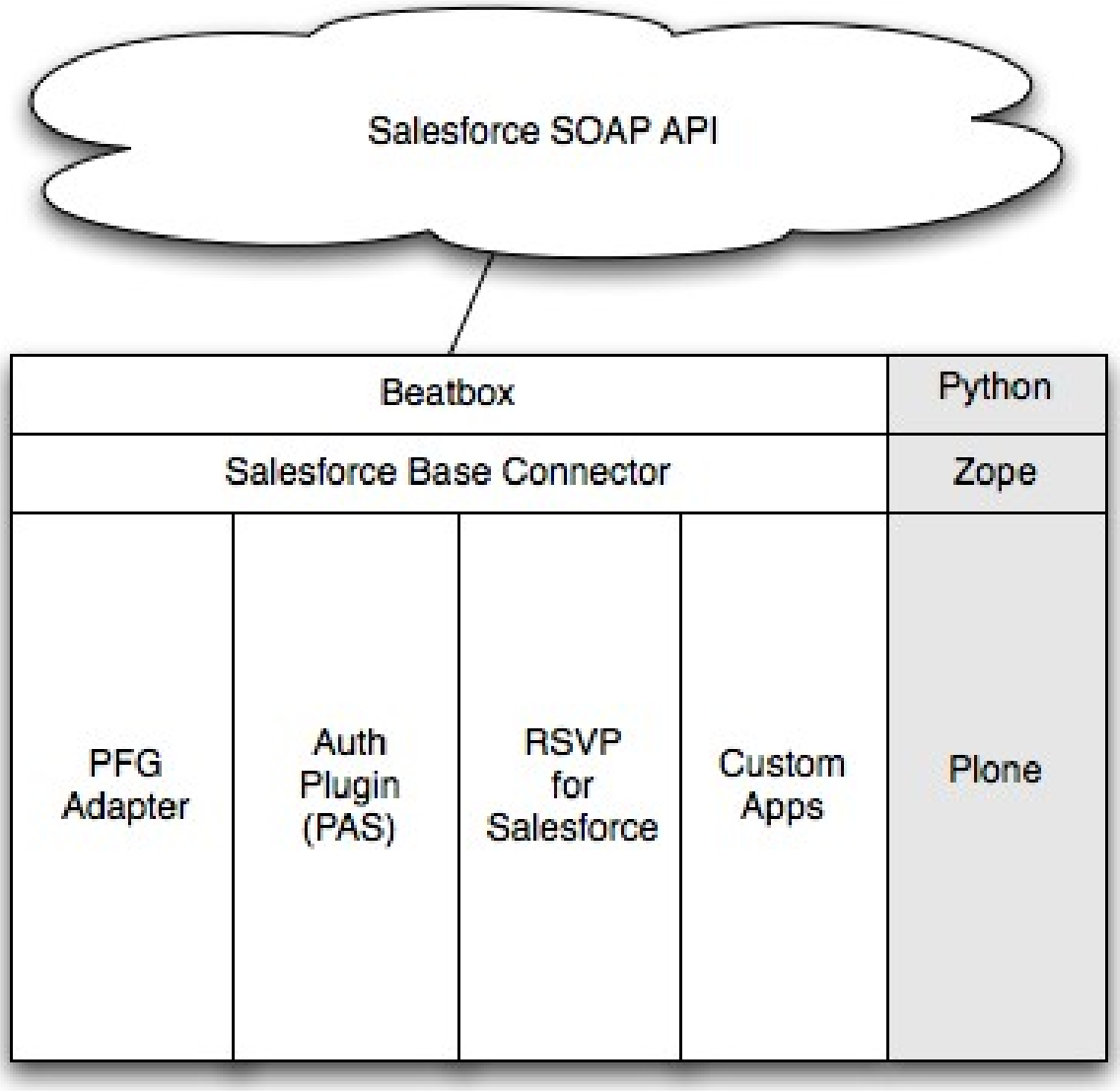


Tools for talking to Salesforce



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



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

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

- 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

Oxfam

NASA

CENTRAL INTELLIGENCE AGENCY
UNITED STATES OF AMERICA

VE RI TAS
HARVARD

UCLA

LUX ET VERITAS
YALE
YALE

Online Forms

Van Jones
GREEN
FOR ALL

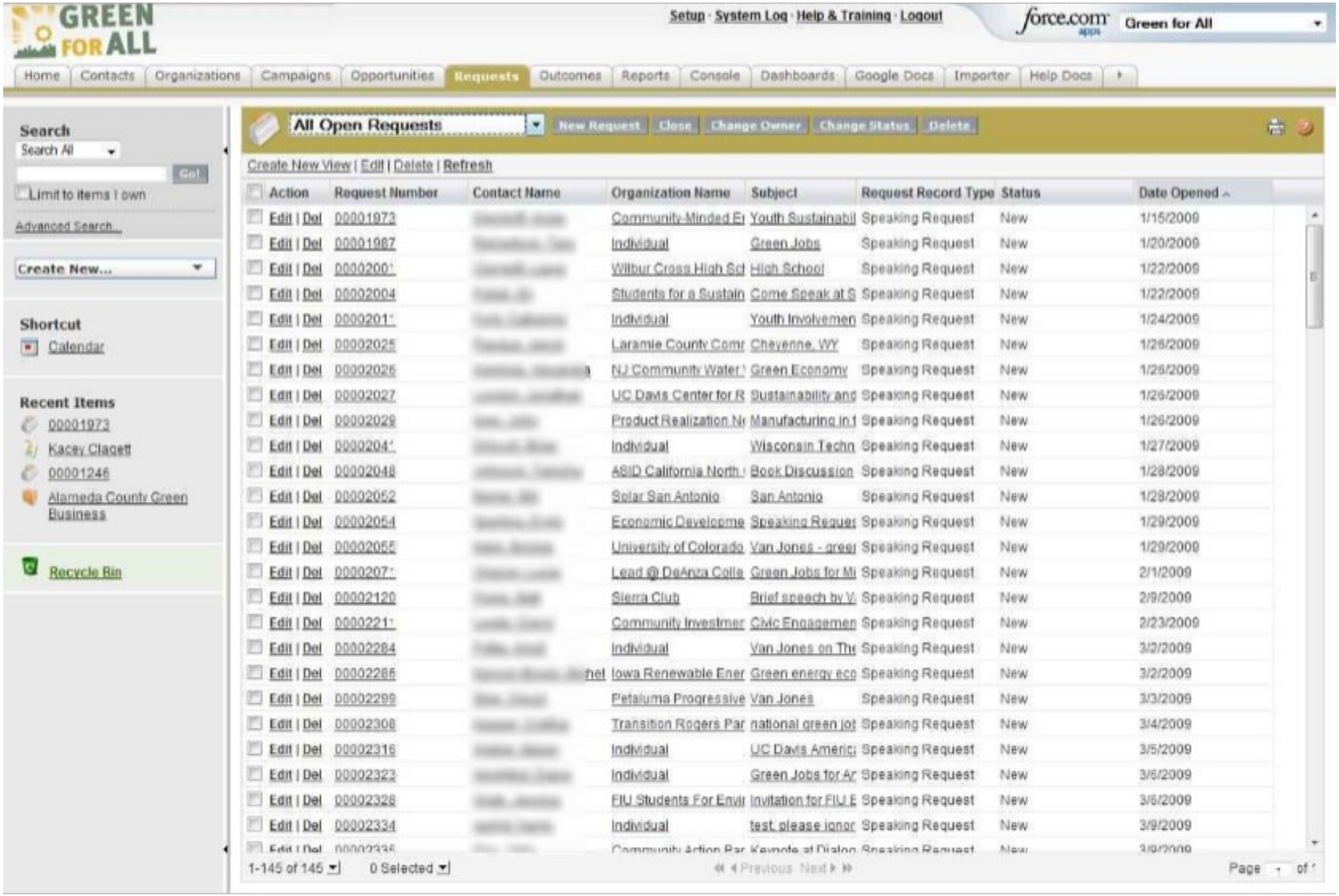
Requests come in through form

Built in Plone

Easy to edit

Dumps directly to Salesforce

Request dashboard in Salesforce



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 malls 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

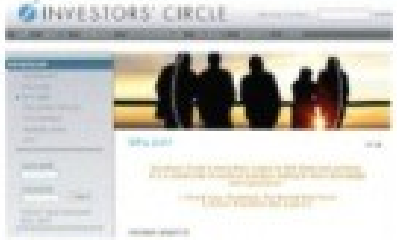
your cart

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

Translate into... | Actions | Add new... | State: Private

Online Fundraising Workshop

Did you know that online donor growth incr... 3 and 2006? Or that statistics prove that people give more m... mail? These are just two reasons why online fundraising... an ever, especially to small- to mid-sized nonprofits. ...op this summer explores the ins and outs of raising... only learn different strategies for online fundraising, b... pols, how to frame your online ask to attract donors, and... like social networking sites or charity malls to increase... perfect for any organization interested in improving its abili...

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...

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.

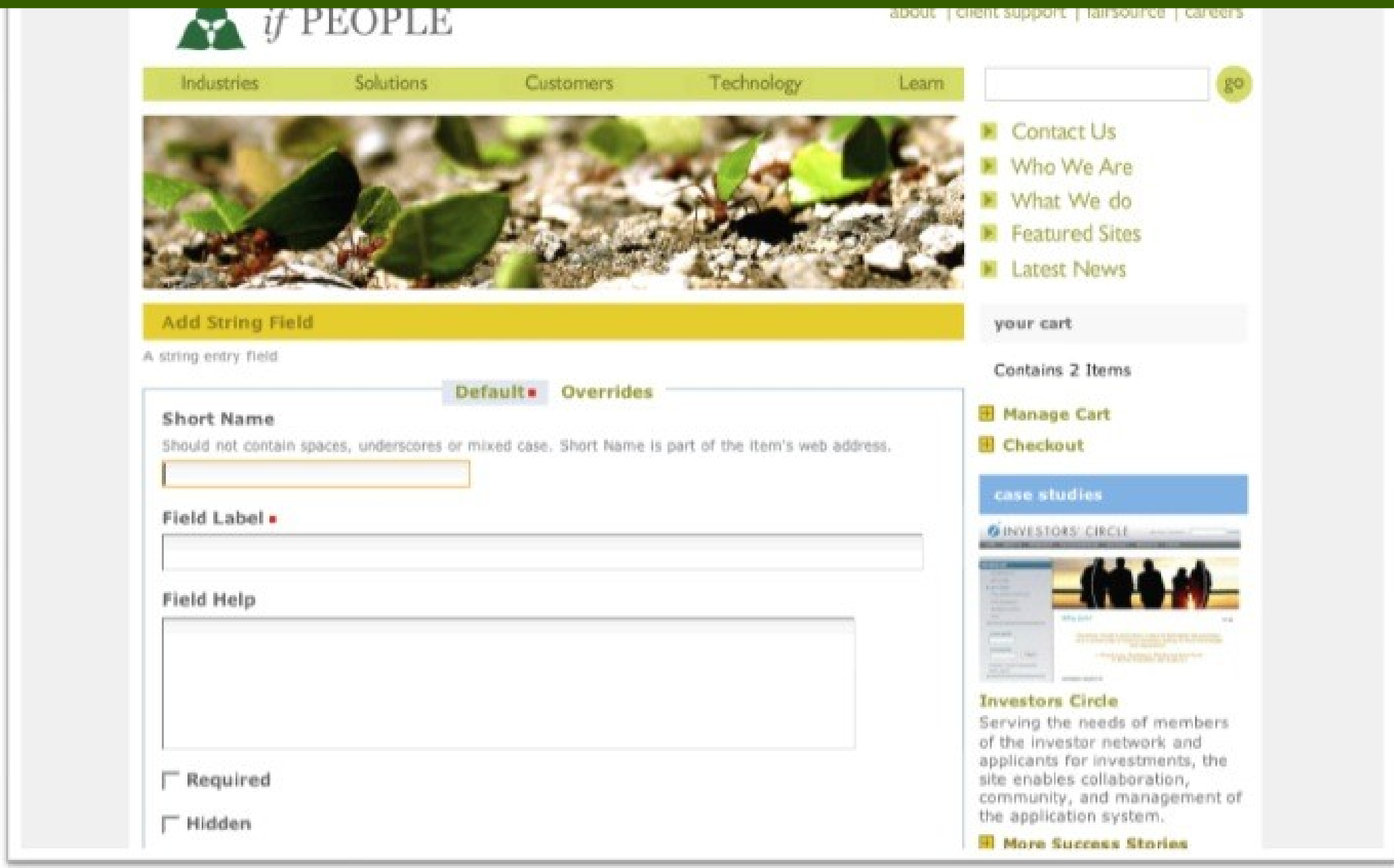
More Success Stories

trainings & webinars

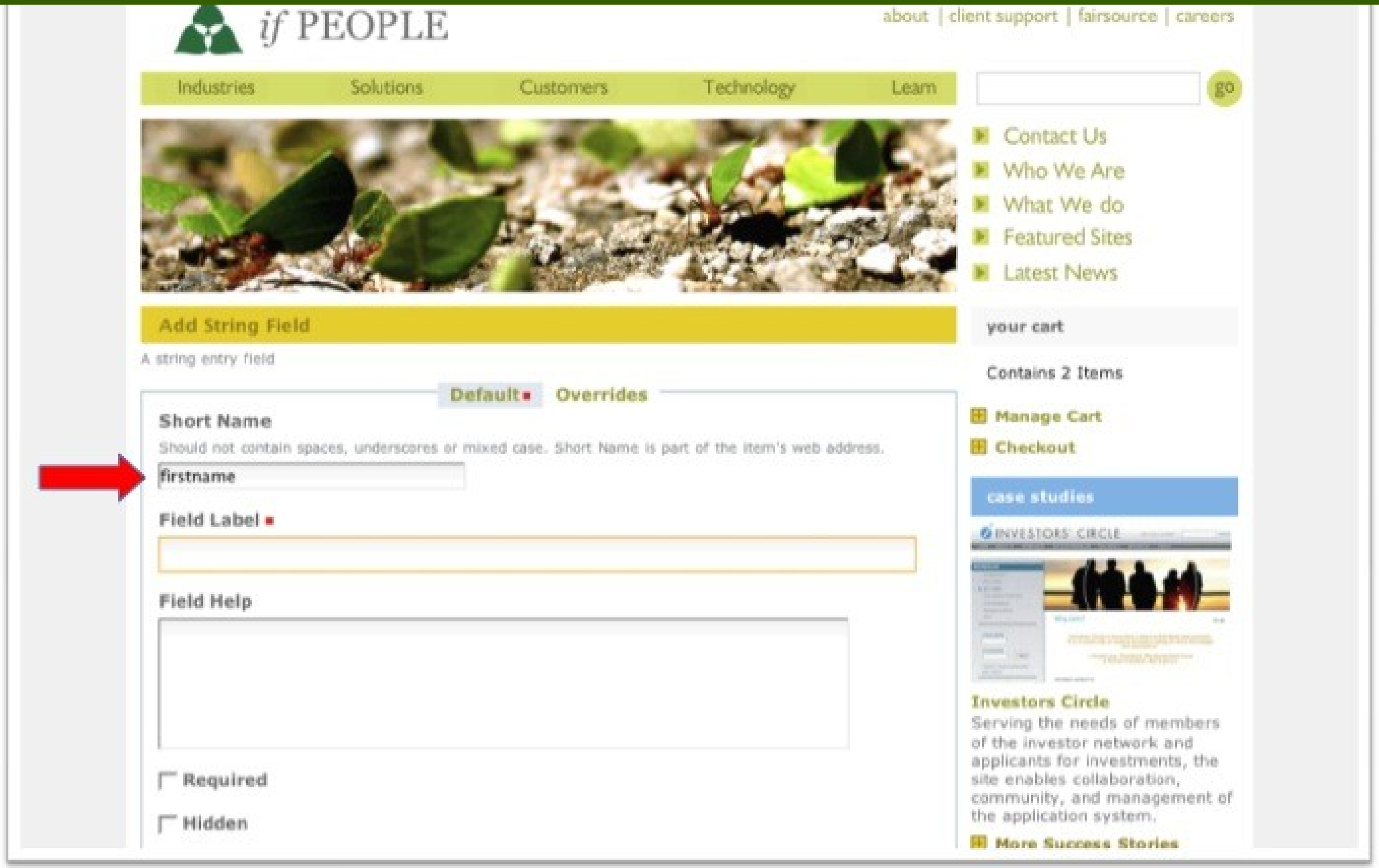
Developing a Social Media Strategy: Summer Workshop Series

Techniques & Tools for Online Fundraising:

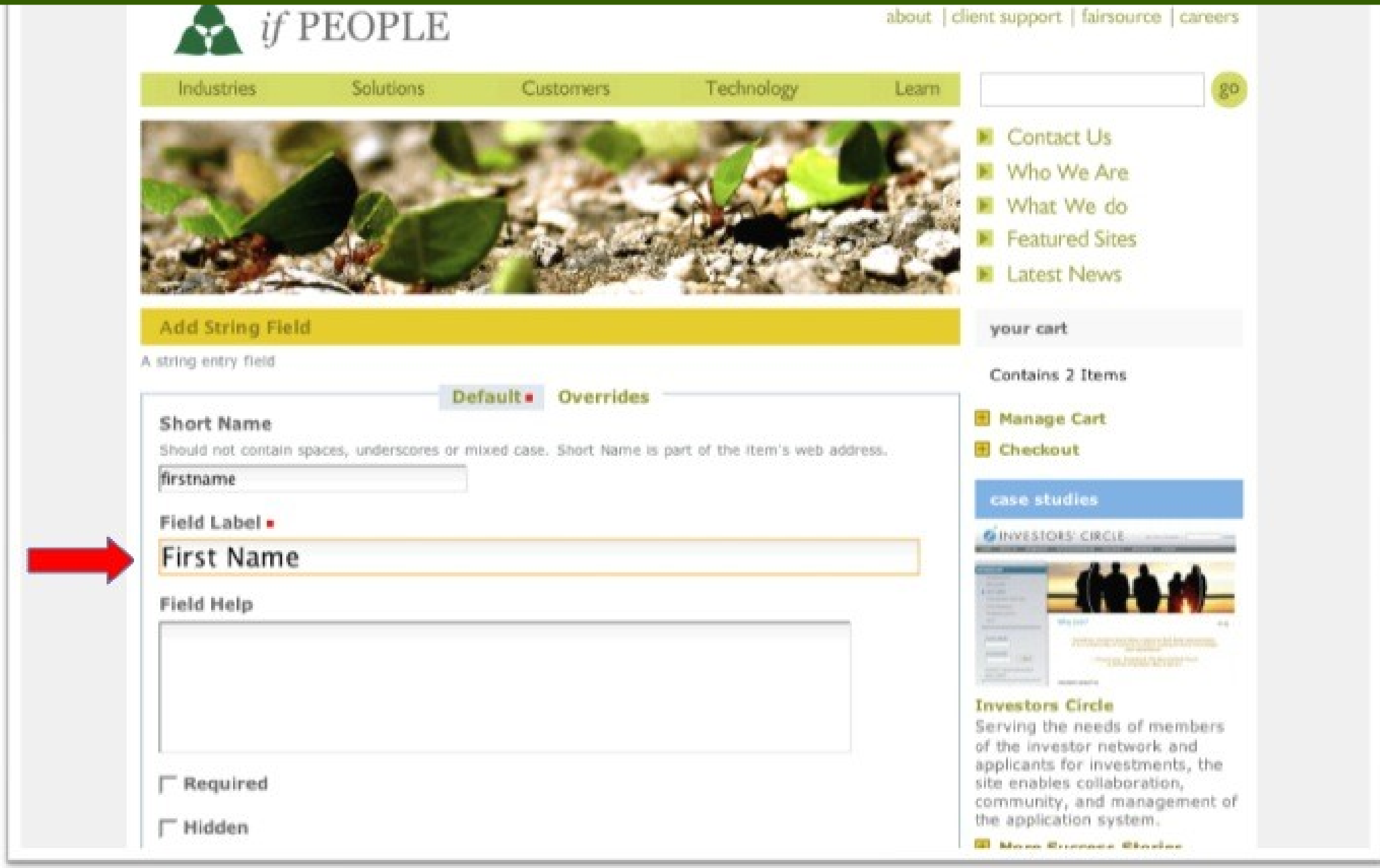
Form Creation



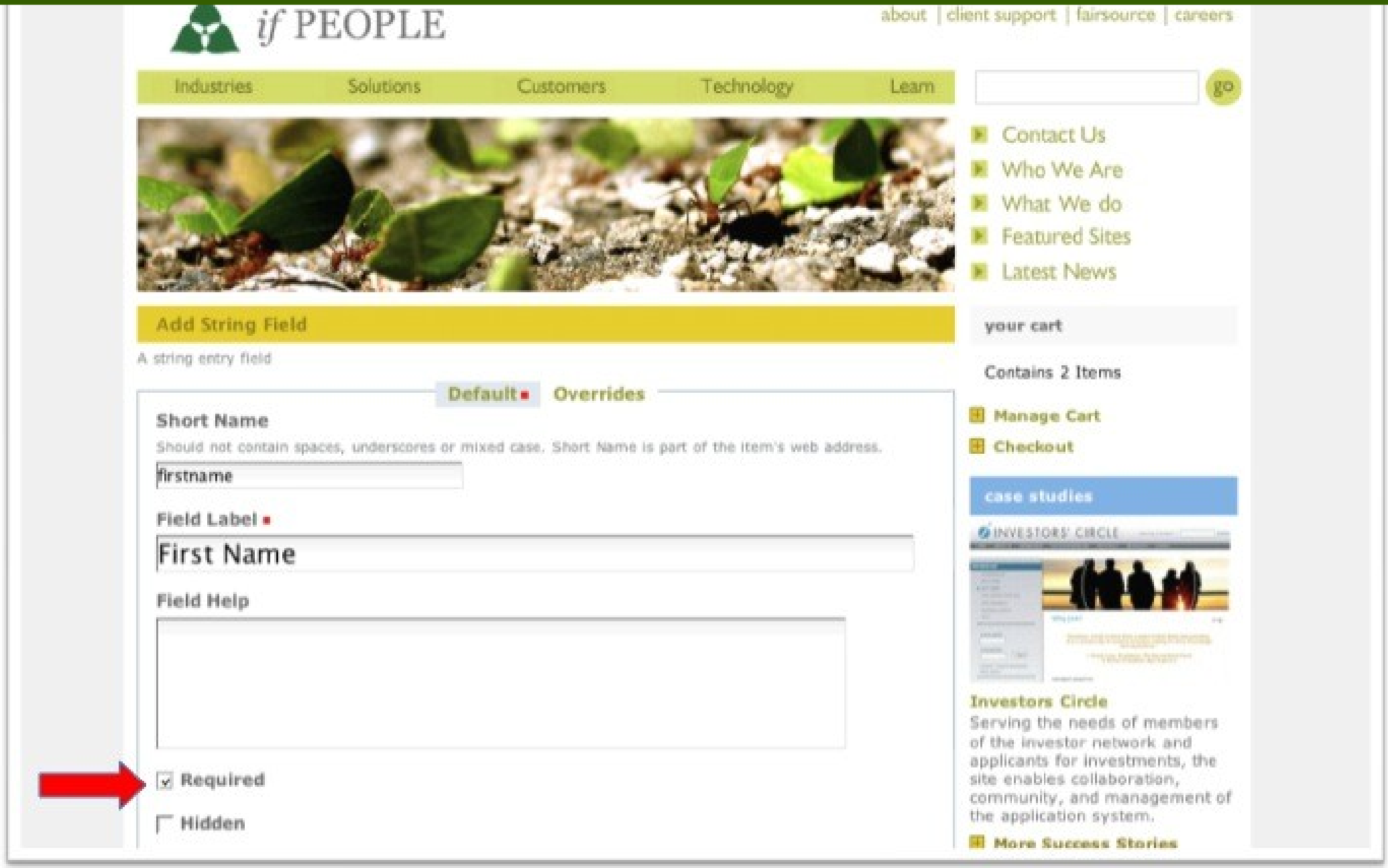
Form Creation



Form Creation



Form Creation



Form Creation

Info Changes saved.

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 malls to increase donations. This course is perfect for any organization interested in improving its ability to attract online donors.

Field	Delete	Edit	Order
Subject *			
First Name *			
Last Name *			
Company *			
Email *			
Comments *			

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

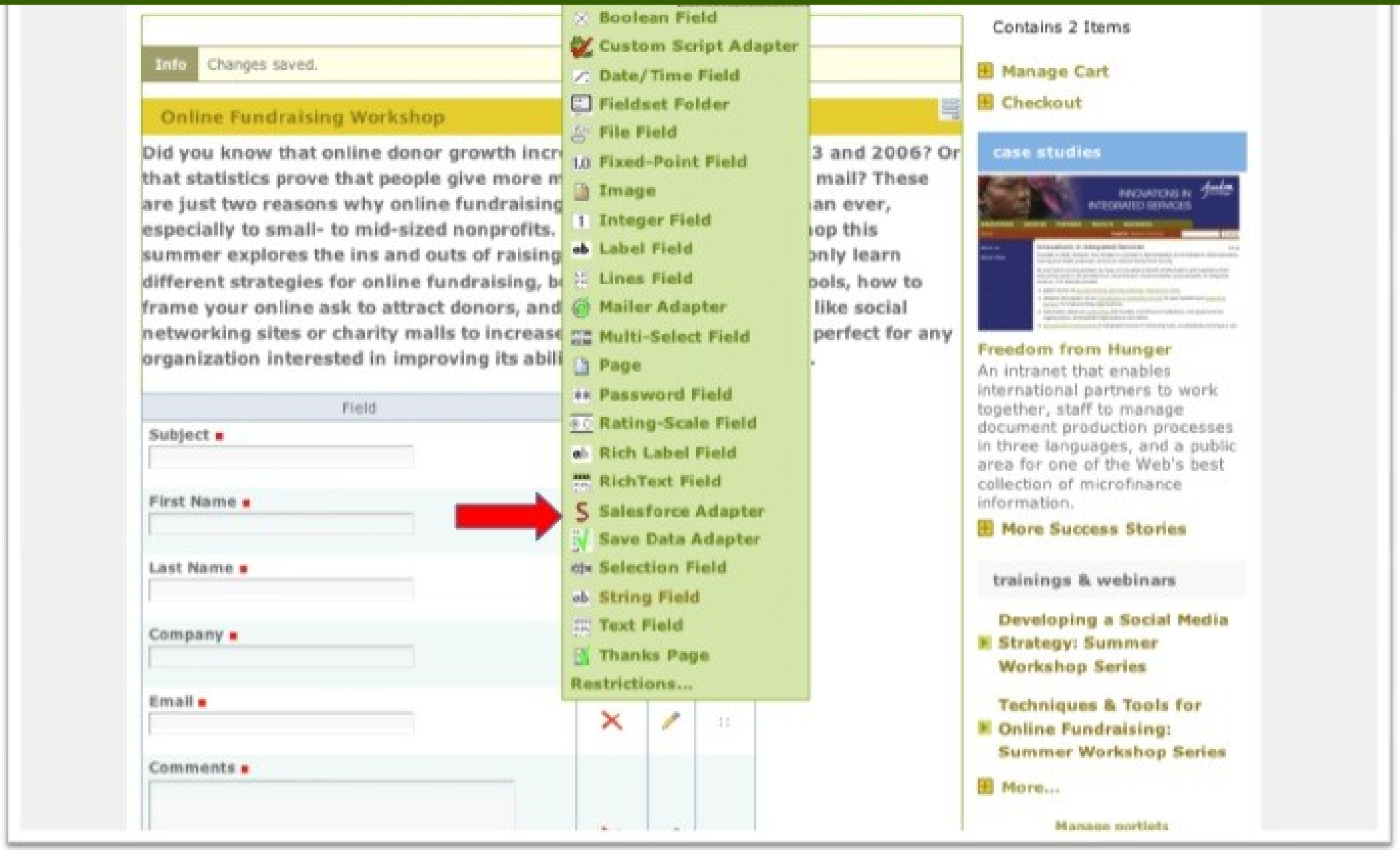
trainings & webinars

Developing a Social Media Strategy: Summer Workshop Series

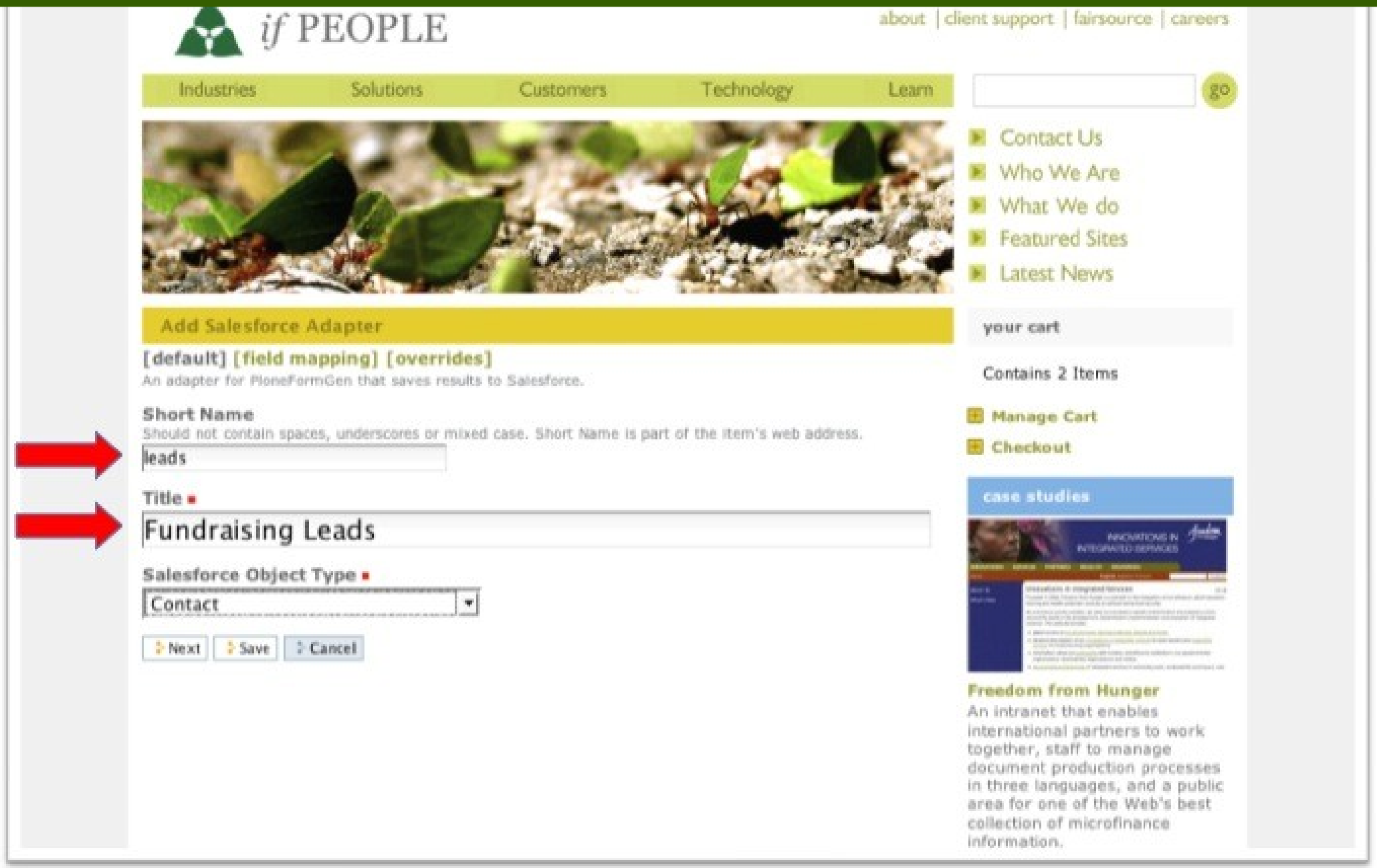
Techniques & Tools for Online Fundraising: Summer Workshop Series

More...

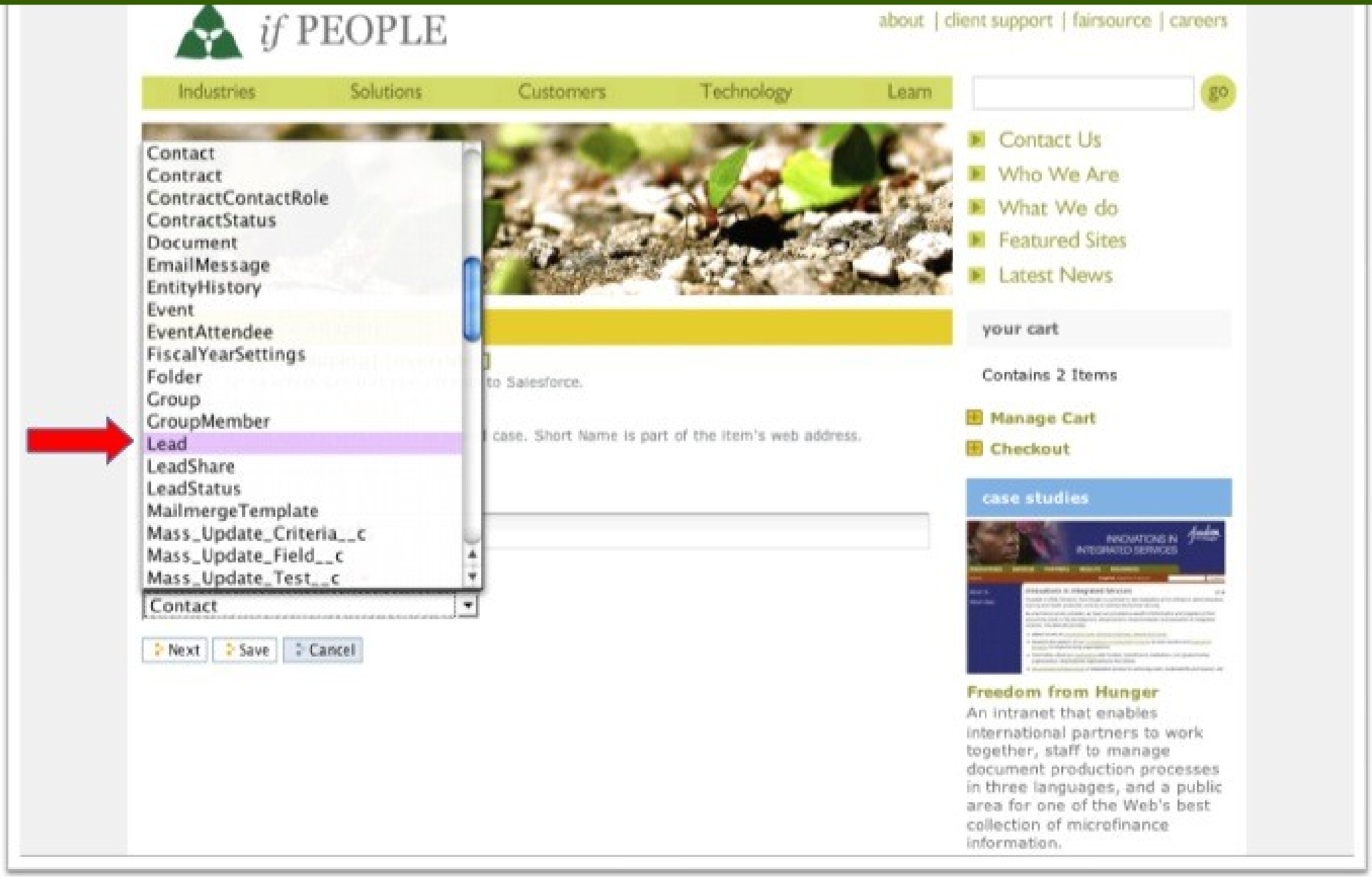
Form Creation



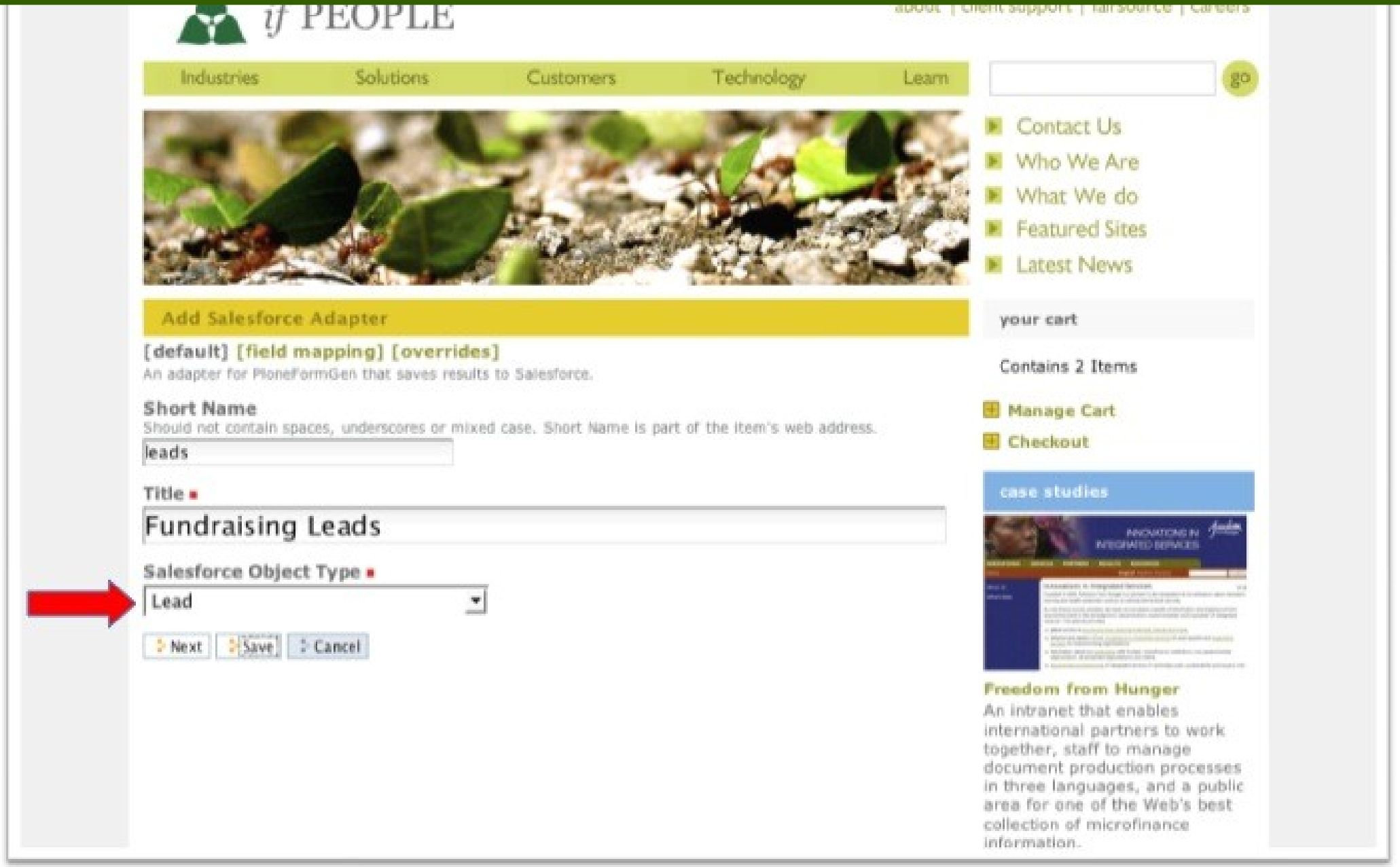
Form Creation



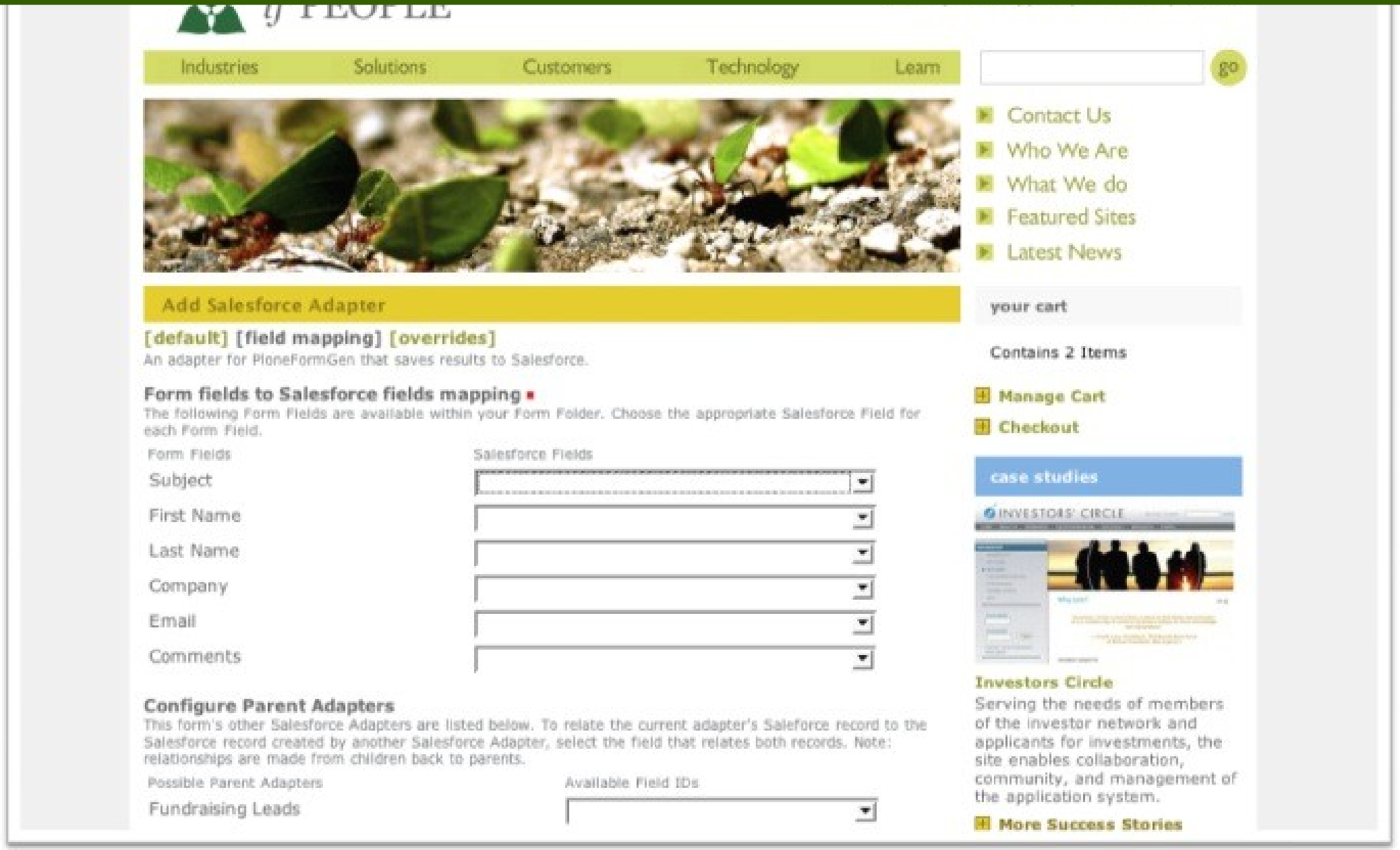
Form Creation



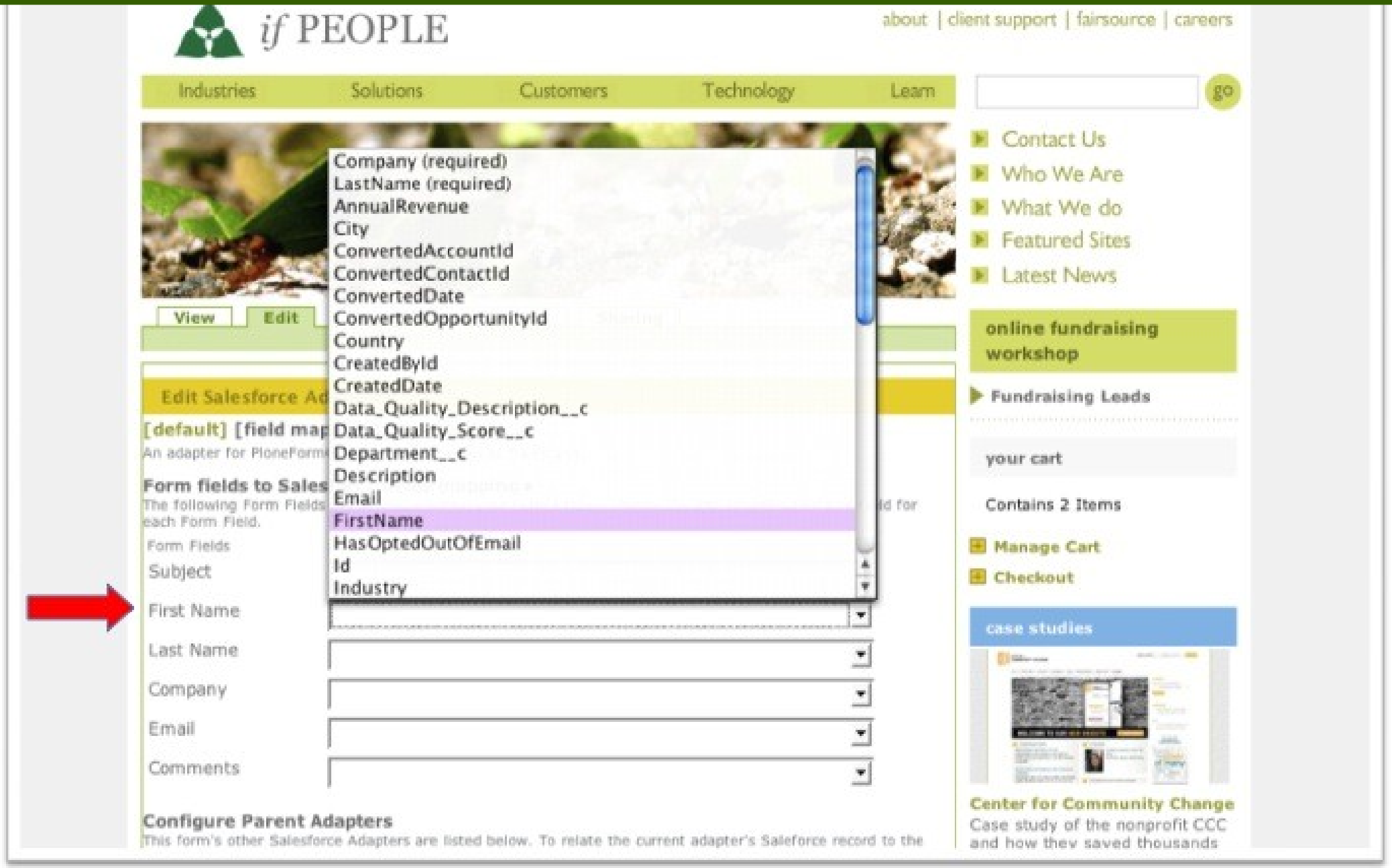
Form Creation



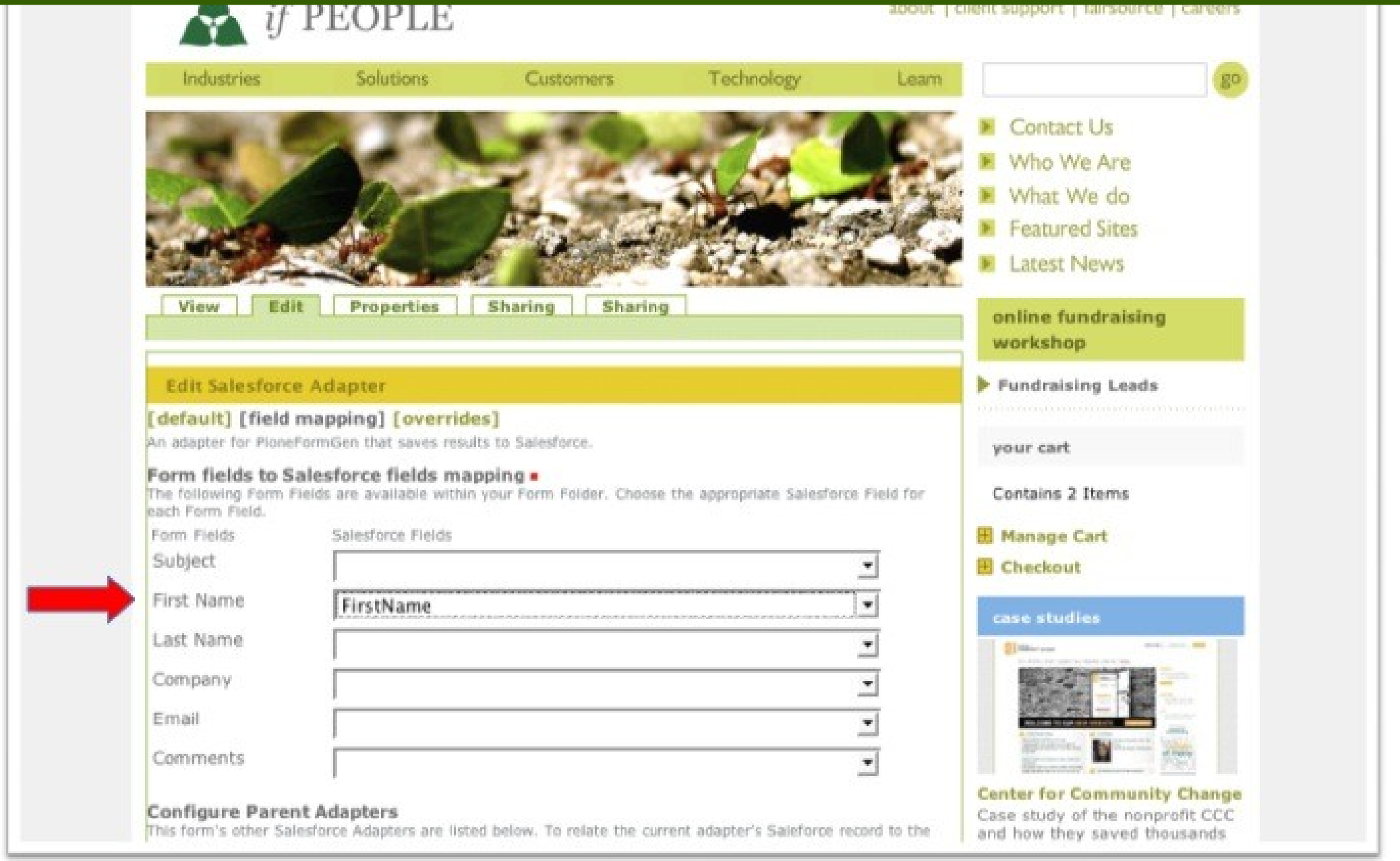
Form Creation



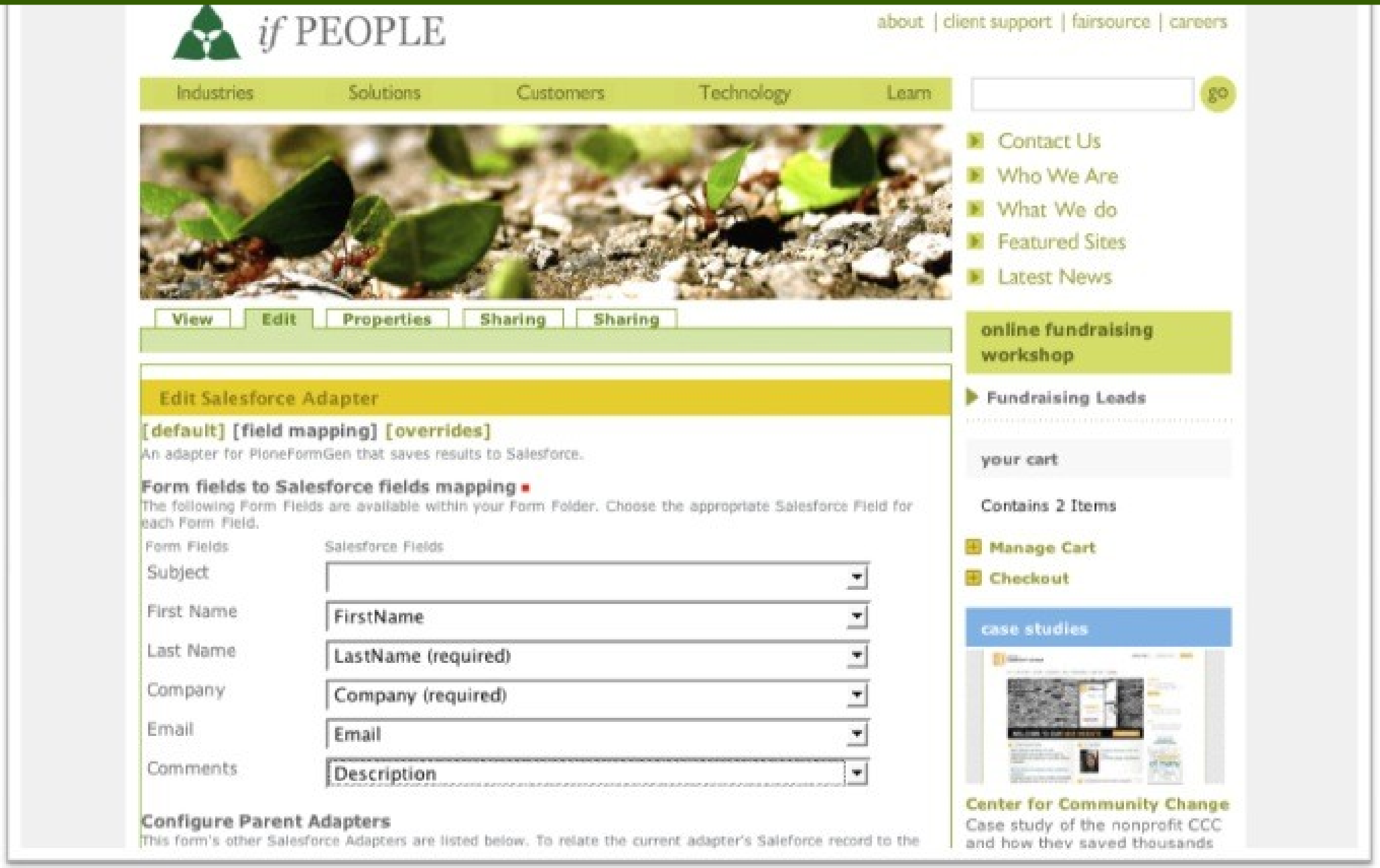
Form Creation



Form Creation



Form Creation



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 mails 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 *

Submit

Manage Cart

Checkout

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.

More Success Stories

trainings & webinars

Developing a Social Media Strategy: Summer Workshop Series

Techniques & Tools for Online Fundraising: Summer Workshop Series

More...

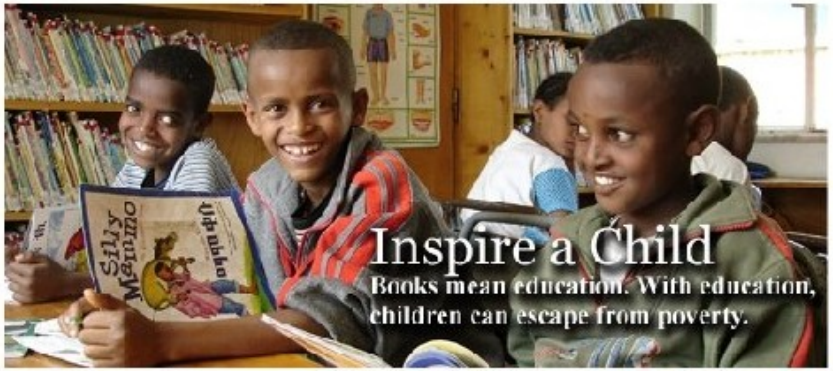
Manage portlets

E-commerce

Client: Trees for Life

Trees for Life® INTERNATIONAL

Search Site go

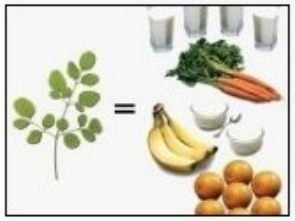


Our Work | Get Involved | Give | Learn | About Us

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

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

Trees for Life® INTERNATIONAL

You are here: Home → Give → Catalog

Search Site go

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

Gifts from the heart. GO

join our email list

Secure Site

http://www.treesforlife.org has been validated and is secure for online tansactions.

Shopping cart & additional donations

Our Work | Get Involved | Give | Learn | About Us

Your Shopping Cart

Your Cart Contents

	Quantity	Name	Price	Total
☐	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

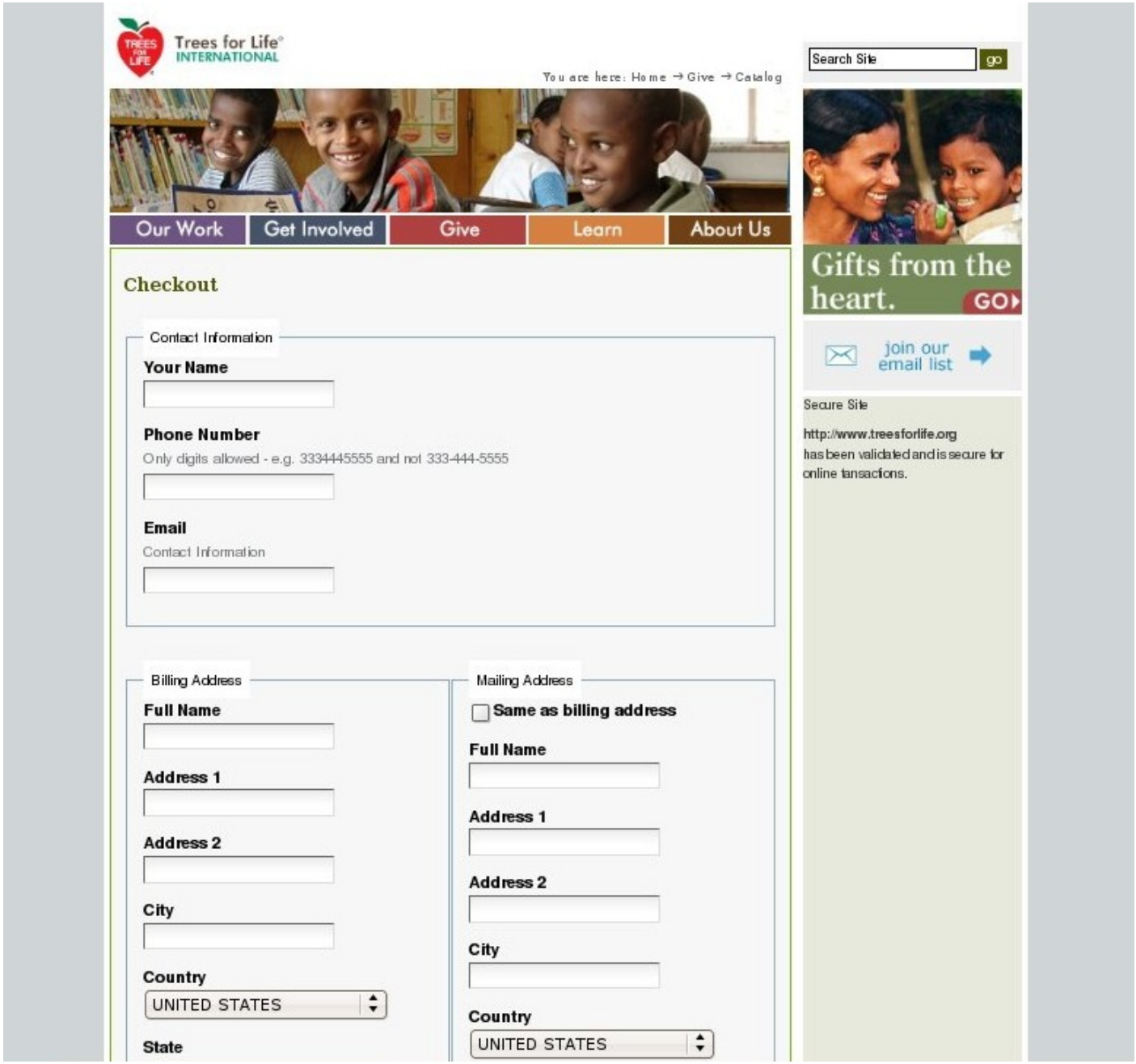
Continue Shopping | Checkout

join our email list

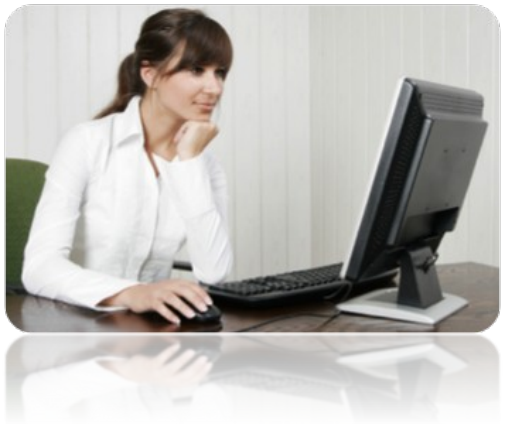
Secure Site

http://www.treesforlife.org has been validated and is secure for online tansactions.

Checkout

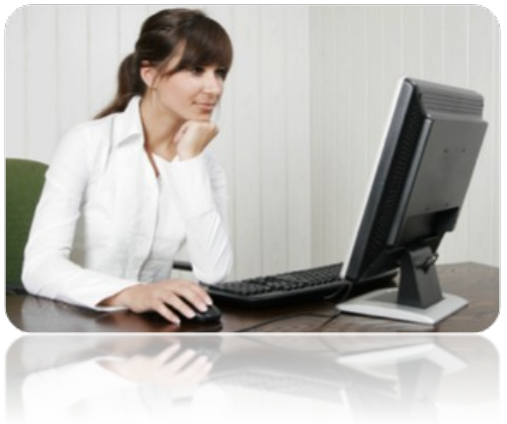

Trees for Life
INTERNATIONAL
You are here: Home → Give → Catalog
Search Site
go
Our Work
Get Involved
Give
Learn
About Us
Gifts from the heart.
GO
join our email list
Secure Site
http://www.treesforlife.org has been validated and is secure for online transactions.
Checkout
Contact Information
Your Name
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
UNITED STATES
State
Mailing Address
Same as billing address
Full Name
Address 1
Address 2
City
Country
UNITED STATES

User data



Plone®

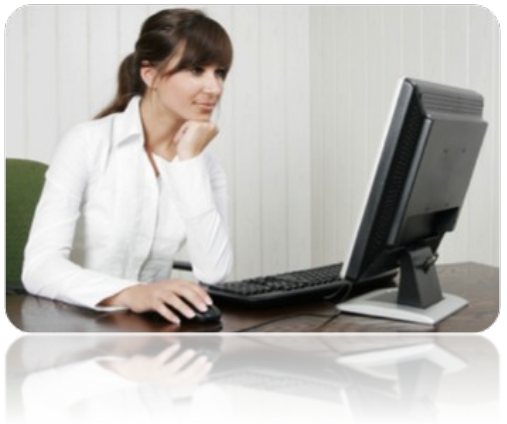
user data



Plone®

Authorize.Net
Where the world does business on the Web

user data



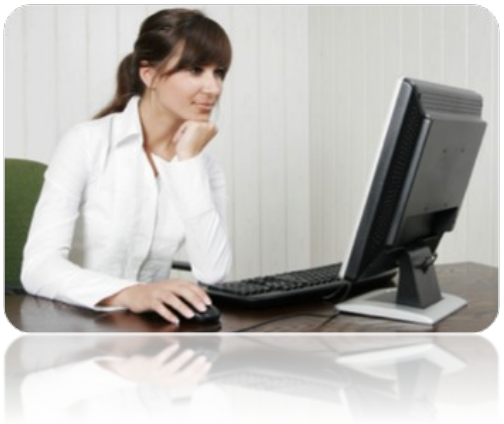
Plone®

Authorize.Net
Where the world does business on the Web

order

payment

user data



Plone®

Authorize.Net
Where the world does business on the Web

order

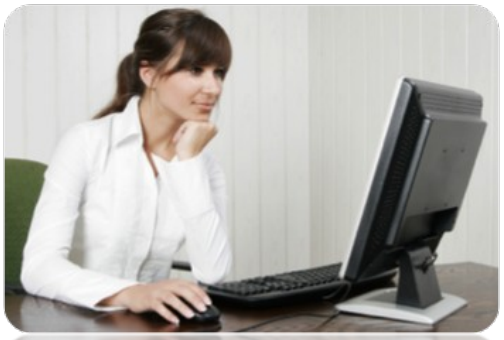
payment

Salesforce™

- contact
- opportunity
- donation details

user data

Plone®



Authorize.Net
Where the world does business on the Web

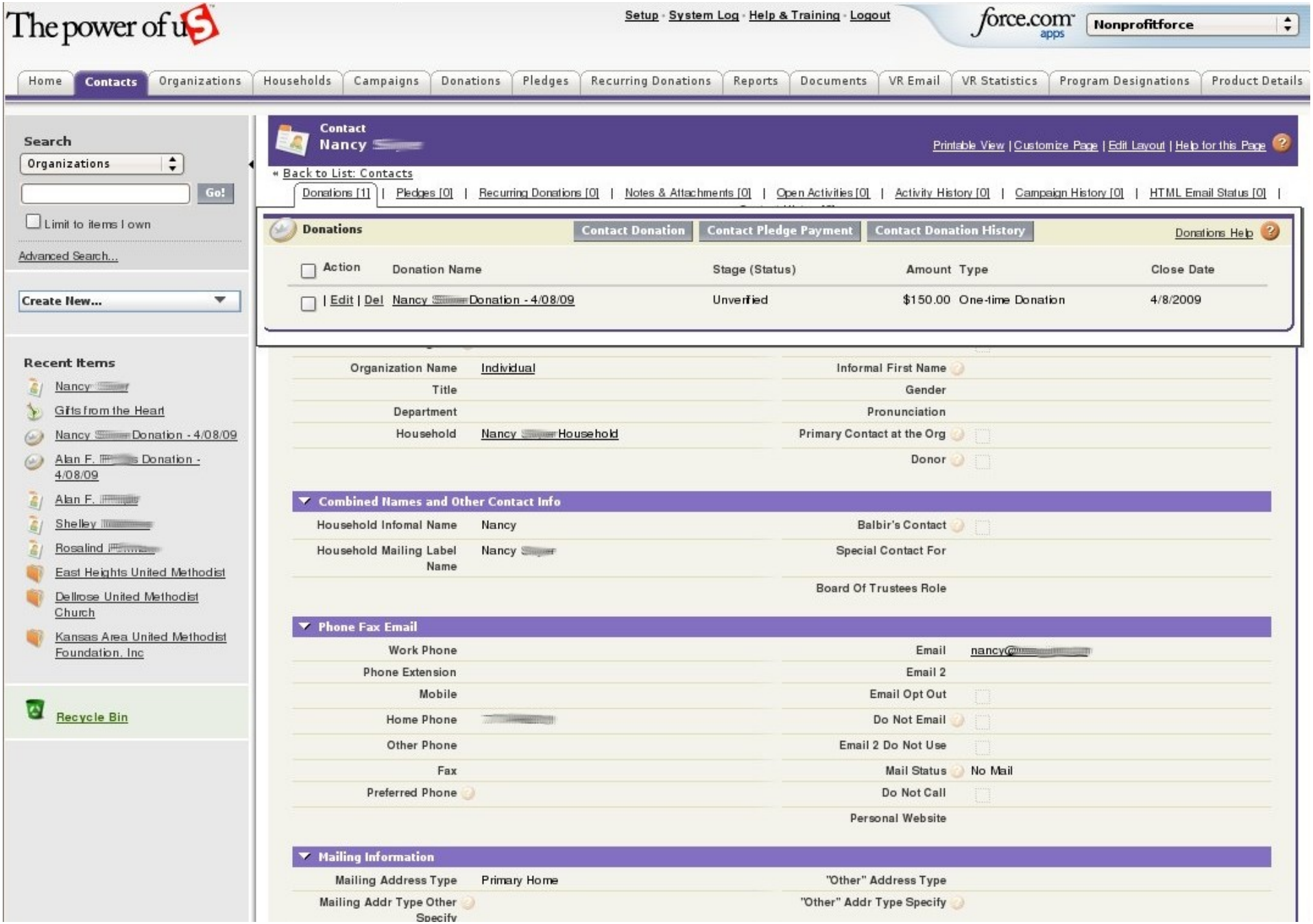
order

payment

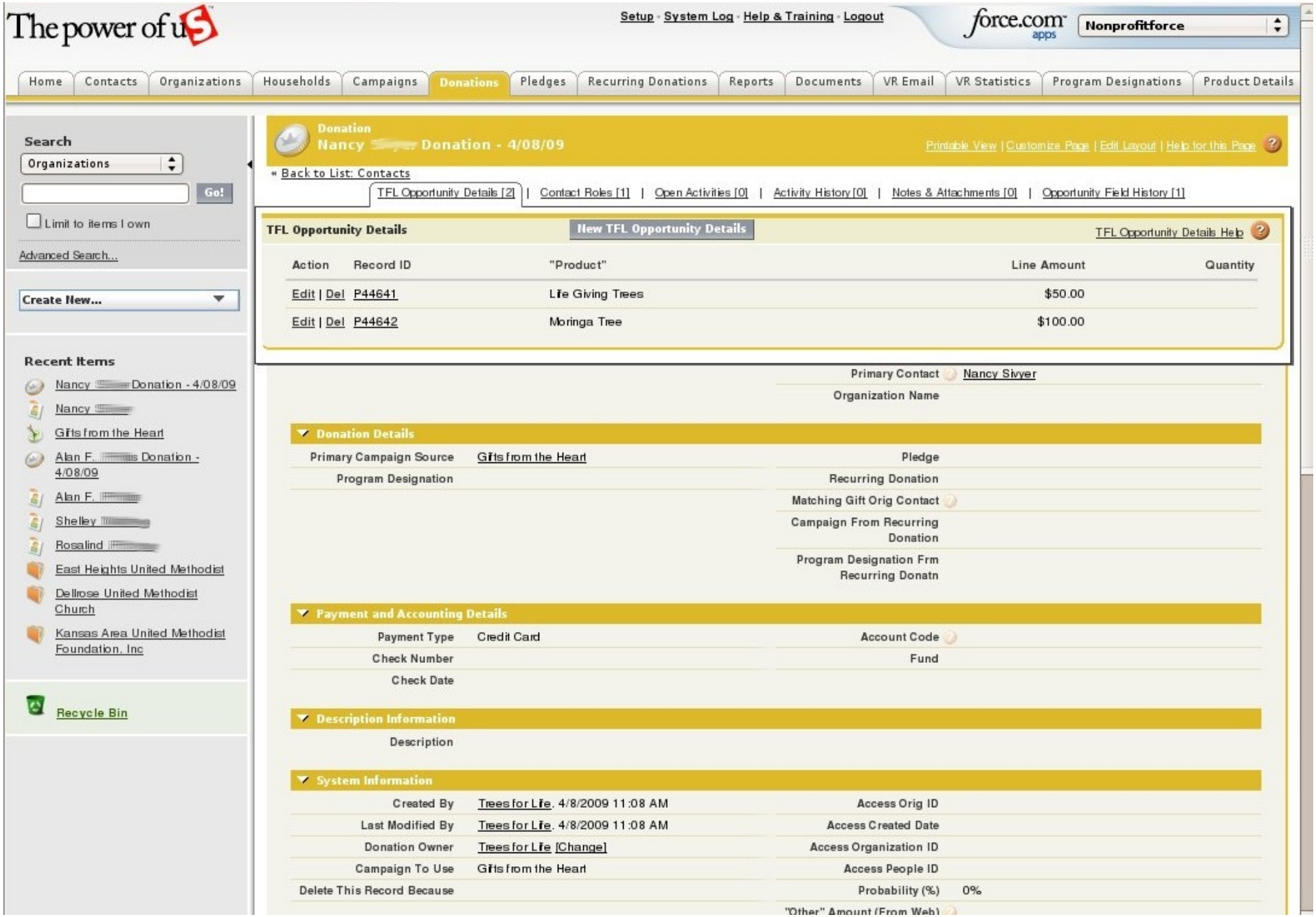
Salesforce™

- contact
- opportunity
- donation details

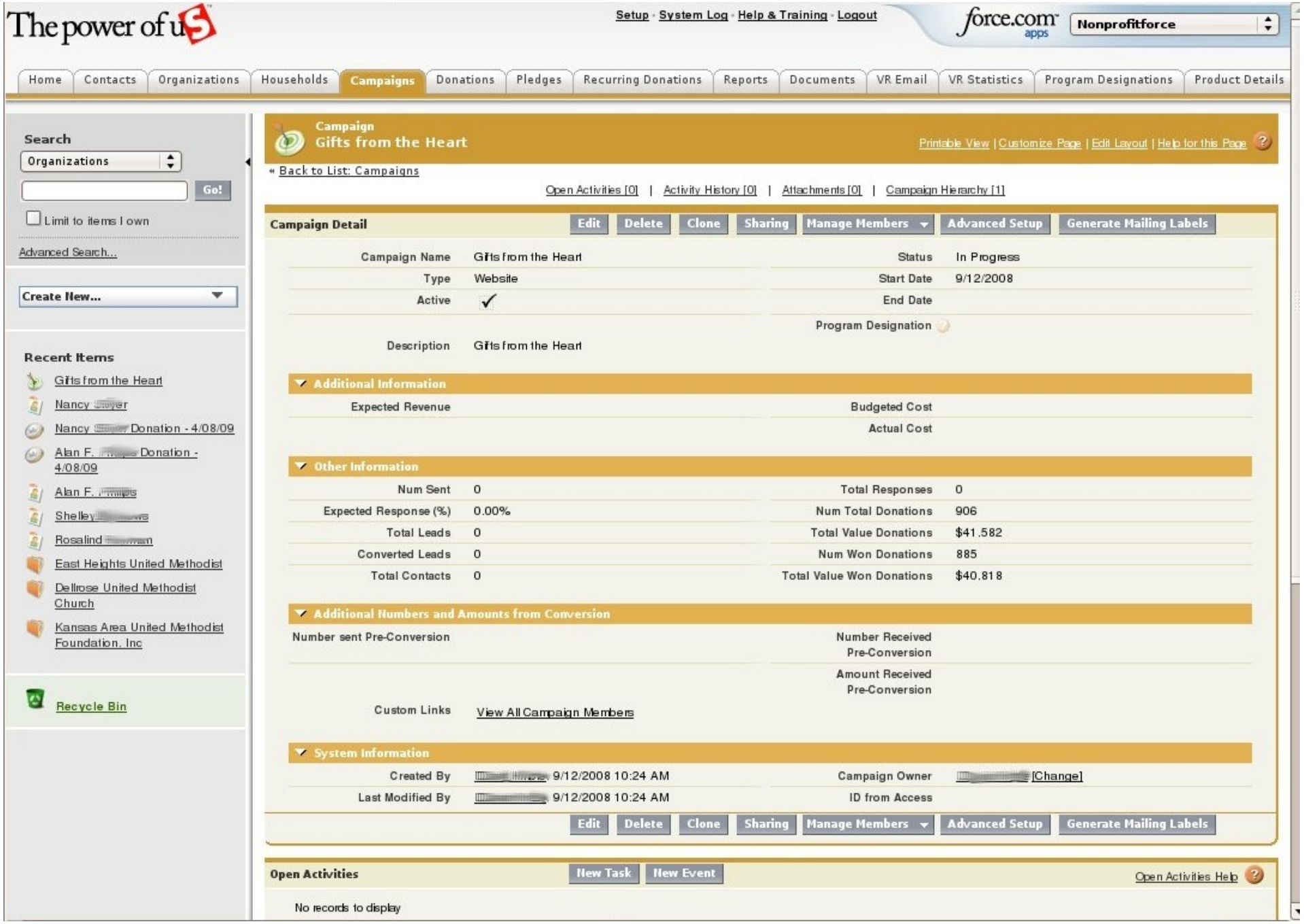
Contact record with donation



Donation details



Web donations create campaign reports



Online Directory

Client: Oregon Environmental Council

Find providers on Google map

Find an Eco-Healthy Child Care

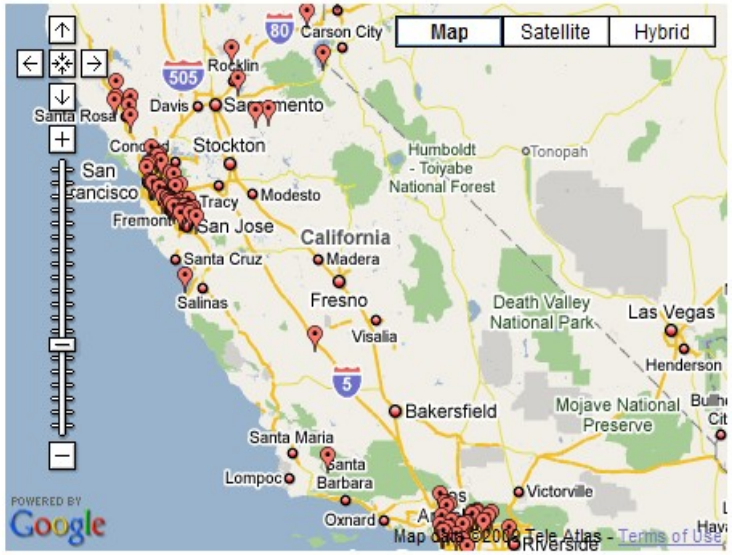
Total Endorsed Providers: 926
Total Children Served: 38163

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

Find an Eco-Healthy Child Care

State: CA

City: -- All cities --

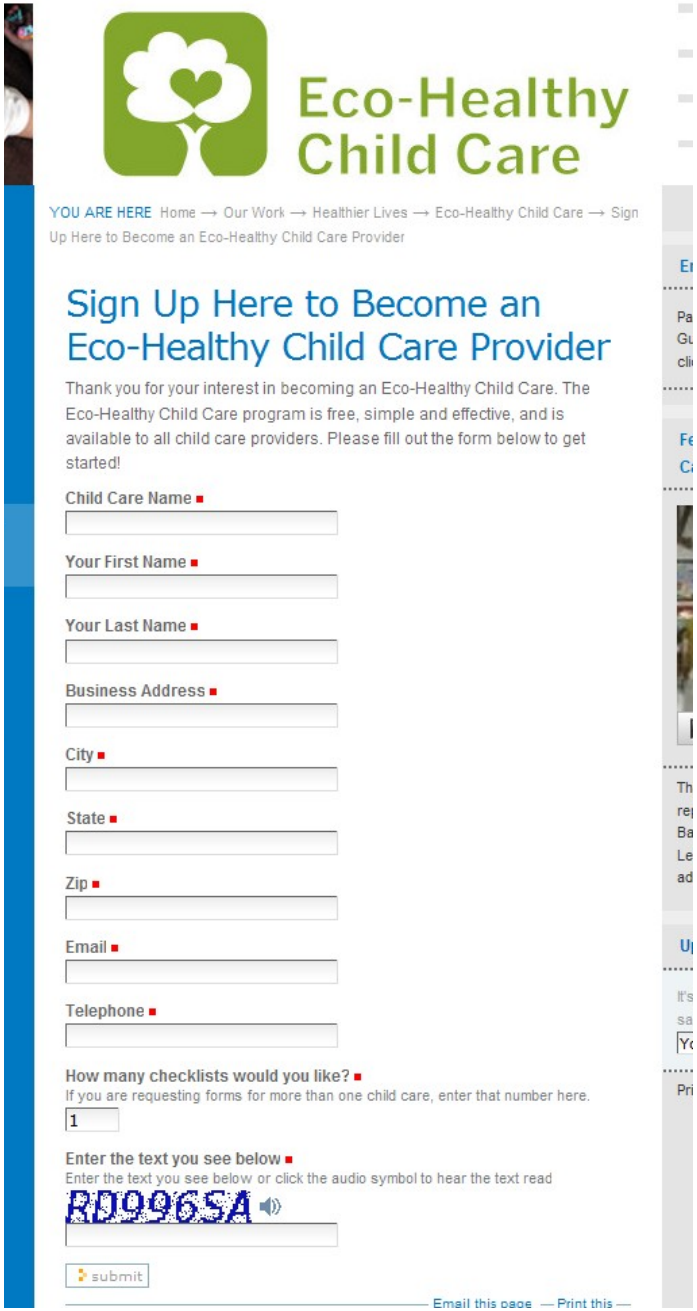


View entire map
Add my organization

CA

Total Endorsed Providers: 116
Total Children Served: 4783

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 ■

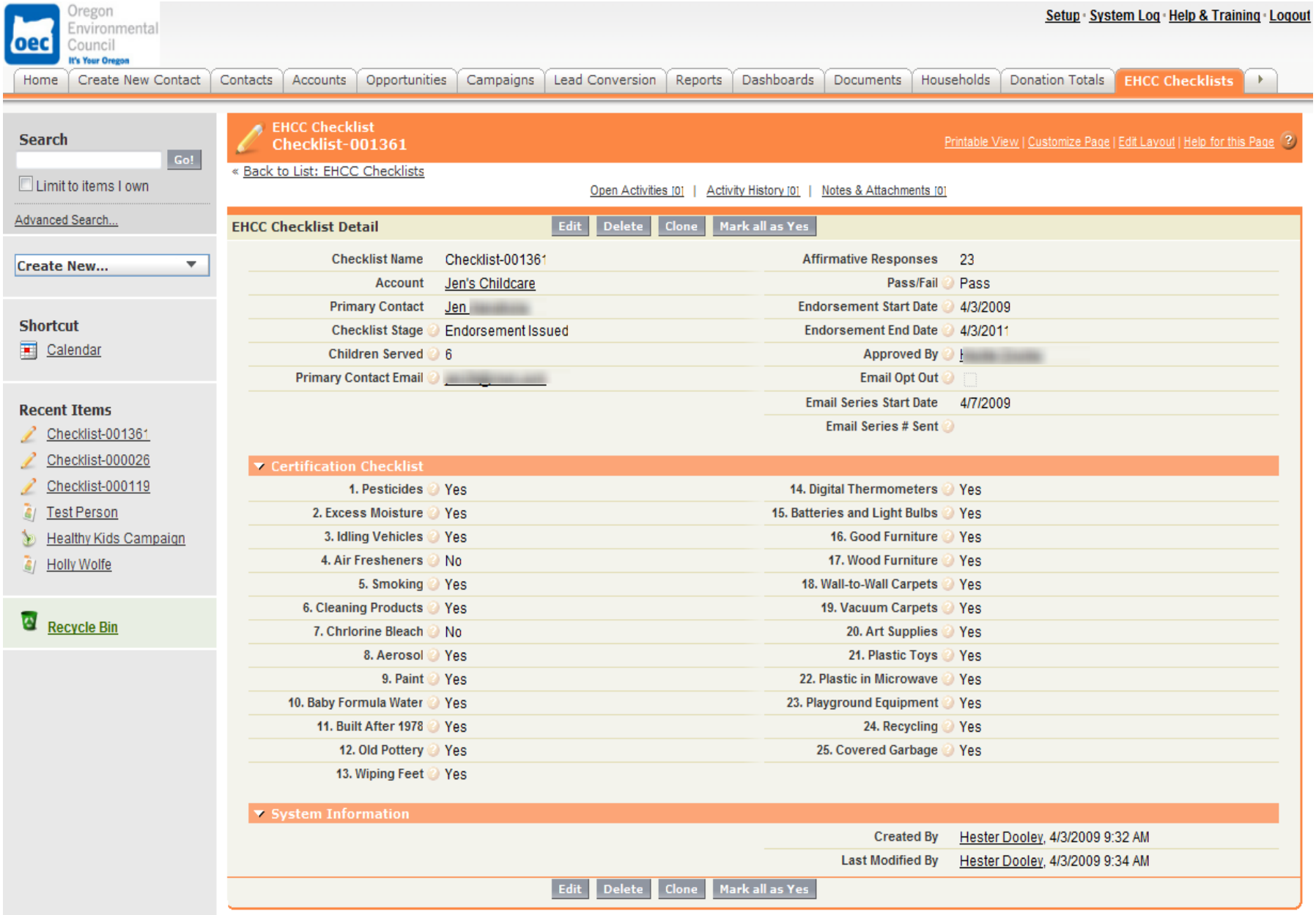
How many checklists would you like? ■
If you are requesting forms for more than one child care, enter that number here.
1

Enter the text you see below ■
Enter the text you see below or click the audio symbol to hear the text read
RD996SA

submit

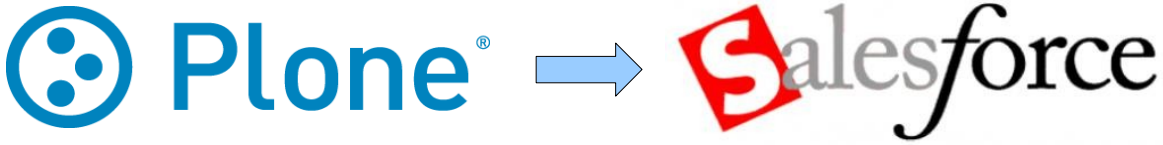
Email this page — Print this —

Provider info flows into Salesforce

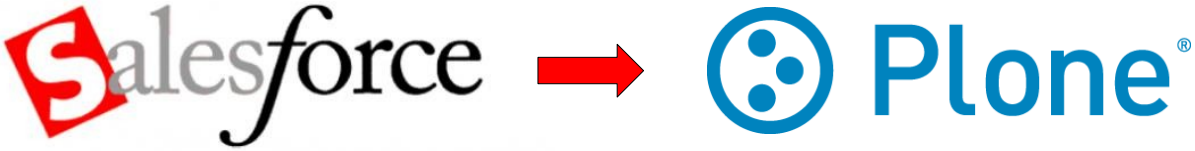


Skill Levels

Easy



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

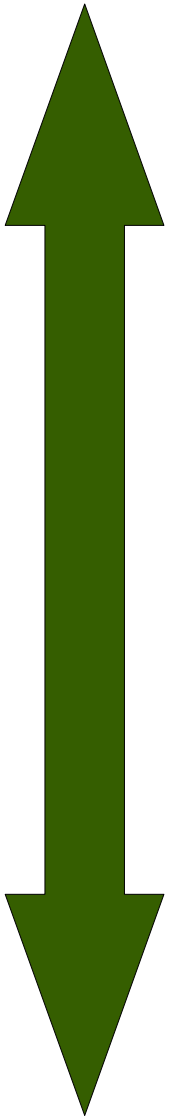


- Data from salesforce.com shown/interactive in Plone
- Login authentication

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

if PEOPLE
innovation for people

groundwire
YOU ARE CONNECTED

www.ifpeople.net
snurl.com/plone-sfdc
cjj@ifpeople.net
678.608.3408

www.groundwire.org/labs

info@groundwire.org
206.286.1235

Salesforce + Plone®

Product Documentation:
snurl.com/plonesfdoc

Plone-Salesforce Mailing List:
snurl.com/plonesflist