

RapLeaf Salesforce integration application package for Convio Common Ground

Long version

This document is located under the Convio Open download page which can be reached at: <http://open.convio.com/downloads/packages/rapleaf-docs.html>

WHAT THIS IS: An application written by RapLeaf on the Force.com platform to work with Convio Common Ground.

WHAT THIS DOES: Provides a subset of constituent profile data can automatically populate fields on a contact record. The provided fields are age, gender, location, income, and occupation.

COST: This is a limited function version that is provided for free to Common Ground clients, subject to the accepted terms and conditions set forth by RapLeaf. This package has no expiration date.

ESTIMATED TIME TO GET APP WORKING: 30 min if you are walking through these directions at a comfortable pace. Faster if you are an experienced CG or Salesforce admin. Admin access is required to install a new package and edit the contact layout screen. **Note that no coding or programming is required to enable this integration-** it is all point-and-click, drag-and-drop!

HOW DO I GET MORE FIELDS ADDED TO POPULATE?: If you wish to upgrade this application to a paid version that provides more constituent data, please contact Rapleaf at info@rapleaf.com or dial 415-886-7270. Additional available fields that can be automatically populated by RapLeaf for Convio Common Ground are available in a supplement document available from Convio or Rapleaf upon request or from the download page listed above.

DISCLAIMER: This application is provided by RapLeaf for free use by Convio Common Ground users, providing limited fields as described in the application package installation details. You agree to use this application “as-is”. There is no warranty or support provided by Convio for using this third party application. RapLeaf has made reasonable efforts to test and verify this application for use by Convio Common Ground clients but that does not mean the application is free from defects. You agree to abide by RapLeaf’s Personalization API terms and conditions that are published at: https://www.RapLeaf.com/developers/api_usage .

For questions about usage and support of this application, please contact RapLeaf at info@RapLeaf.com .

INSTALL STEPS:

The following steps will walk you through installing and configuring the RapLeaf integration application for Convio Common Ground.

You will need the URL link of where the RapLeaf package exists within Salesforce. Click or cut and paste this link below to use in your web browser:

<https://login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04tC0000000IKsL>

You will see a screen like this that displays package installation details; click on the “Continue” button to proceed.

NOTE: the latest version as of May 2011 is 1.5.

The screenshot shows the Salesforce interface for installing a package. The top navigation bar includes links for Home, Reports, Accounts, Contacts, Donations, Pledges, Recurring Gifts, Events, Volunteer Jobs, Campaigns, and Batches. The user is identified as Doug Fierro. The left sidebar contains sections for Personal Setup, App Setup, and Administration Setup. The main content area is titled "Package Installation Details" and displays the following information:

- Package Name: Rapleaf
- Version Name: Convio
- Version Number: 1.5
- Publisher: Rapleaf
- Description: (empty)

At the bottom of the details section, there are two buttons: "Continue" (highlighted in orange) and "Cancel".

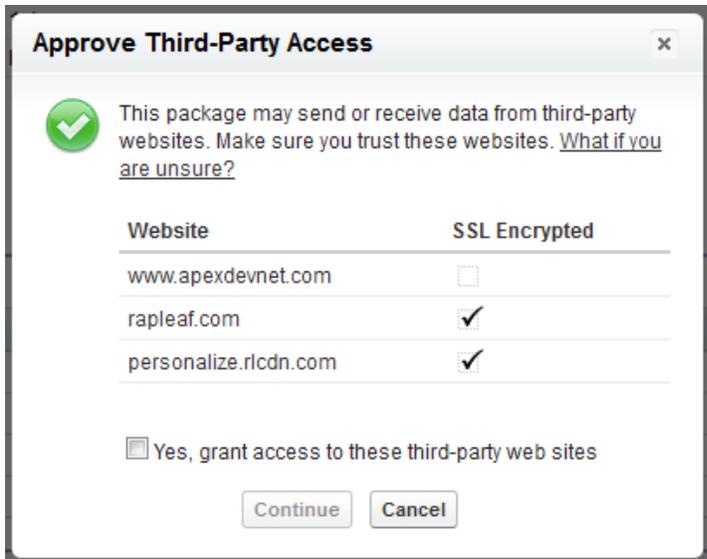
Below the details, there are two sections for "Package Components":

- ▼ Tabs (1)**

Action	Component Name	Parent Object	Component Type
Create	Rapleaf		Tab
- ▼ Pages (2)**

Action	Component Name	Parent Object	Component Type
Create	Rapleaf		Visualforce Page
Create	getRapLeafData		Visualforce Page

Click on the “Yes” box to approve the third party access when prompted and then select “Continue”:



The RapLeaf package installer will then walk you through three steps. The first step there is nothing to select, it is more informative, so just click on the 'next' button at the bottom:

Package Installer

[Help for this Page](#) 

Rapleaf

Step 1. Approve Package API Access
Step 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects
Components in this package will have the user's full API access to the following custom objects included in the package:

- Rapleaf Data
- RapleafSettings

Extended Object Permissions

	Read	Create	Edit	Delete		Read	Create	Edit	Delete
Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Leads	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaigns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Price Books	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contracts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					

For Step2 of 3, keep the default unless there is a reason you need to set different security settings. You can grant access to all users if your staff is small yet not everyone has admin privileges. Selecting custom security settings is an advanced choice.

Rapleaf

Step 2. Choose security level
Step 2 of 3

Select security settings:

- Grant access to admins only Users with your profile get full access (best for limited deployments)
- Grant access to all users All internal custom profiles get full access
- Select security settings User access set by profile (recommended for most packages)

Previous Next Cancel

For Step3, again accept the default choices and click on “Install”:

Step 3. Install Package
Step 3 of 3

The package is ready to be installed. Click Install to continue.

Ignore Apex test failures that may cause the installed application not to function properly.

Previous Install Cancel

The install time for this last step should be under a minute.

When you see the message that the package has been successfully installed, there are a list of things to go through before clicking on the ‘Deploy Now’ button. There is nothing else to complete in the final steps section displayed. You can choose to deploy later, or to keep going click on “Deploy Now”:

Install complete

The components contained in this package have been successfully installed.

The final steps in the install process are to:

1. Change the visibility settings for any installed documents, reports, dashboards, letterheads, email templates, and custom fields on standard objects. By default, these components are visible to all users.
2. Set the Running User for any installed dashboards or analytic snapshots; by default, it is set to you.
3. Specify the appropriate recipients for any installed workflow tasks.
4. Specify the appropriate assignees for any installed workflow alerts.
5. Specify the appropriate user for workflow field updates that modify the Owner field or user lookups; by default, it is set to you.
6. Create a schedule for any installed analytic snapshots.
7. Configure any additional settings for this package from the package detail page.
8. Deploy the package by clicking Deploy Now below. You can also do this at any time in the future from the package detail page.

Deploy Now Deploy Later

You get one more screen to view the package as it exists under App Setup -> Deploy, before the actual deployment. Click on ‘Deploy’:

If you see the following screen below, then congratulations, you have successfully installed and deployed the RapLeaf package for Convio Common Ground! But you are not quite done yet 😊 You now need to configure it for use.

Package Components

Action	Name	Parent Object	Type
	Age	Rapleaf Data	Custom Field
	Contact	Rapleaf Data	Custom Field
	Gender	Rapleaf Data	Custom Field
	Images		Document Folder
	Location	Rapleaf Data	Custom Field
	RapLeaf Age	Contact	Custom Field
	RapLeaf Gender	Contact	Custom Field
	RapLeaf Household Income	Contact	Custom Field
	RapLeaf Location	Contact	Custom Field

CONFIGURING THE RAPLEAF APPLICATION PACKAGE

The new package installation will create a new tab named 'RapLeaf', you can locate it by clicking on the '+' icon at the far right for "all tabs" :

Doug Fierro Help & Training Common Ground

Volunteer Jobs Campaigns Batches Utilities Configuration Resource Center +

Help for this Page ?

add a tab to your display to better suit the way you work.

Add Tabs to Your Default Display Customize My Tabs

- Groups
- Home
- Ideas
- Leads Tell me more!
- Online Configuration
- Online Forms
- People
- Pledges
- Products Tell me more!
- Profile
- Rapleaf
- Recurring Gifts

From this tab there are two things: one is to request an API key, and the second is you can run a batch append across all constituent records in your Common Ground database.

Check your name and email to be sure this is your primary contact information:

Settings

Your Name

Your Email Address

Your Company Name

Do you agree to the RapLeaf [terms of service](#)?

Your API Key:

Updates

Last batch update completed:

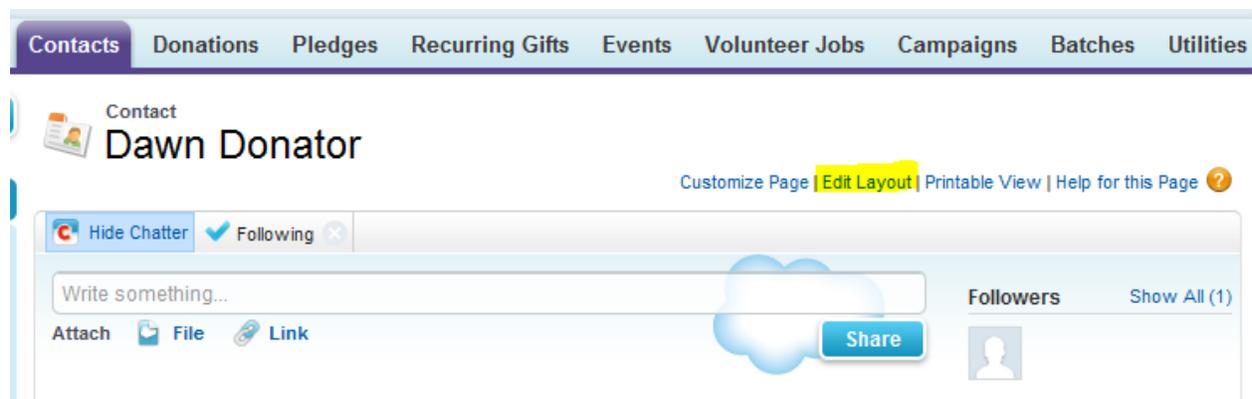
(this will take approx. 1 hr. per 20k contacts)

Check the terms of service box if you agree, then click on the “Get API Key” button. You will see a very long alpha-numeric value displayed for the “Your API Key” once completed. You do not need to request another API key after receiving one.

PAGE LAYOUT FOR NEW FIELDS

Now you need to place the new RapLeaf fields on your Contacts record within Common Ground. You can place a subset if you wish or all available. You have a few choices- you can insert them into existing sections within the contact record, or you can create a new section just for RapLeaf appended data. You can really place them anywhere you want on the contact record, and it does not require any coding!

From the Contacts tab within Common Ground, select any contact name and then click on “Edit Layout” at the top of the page:



From the contact layout palette at the top, you will see a button labeled “Section”. This is also displayed if you click on “Custom S-Controls” in the navigation section on the left. Click on the Section button and drag it on the contact layout to where you want to create a new section for RapLeaf data:

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons
Custom Links
Visualforce Pages
Custom S-Controls
Related Lists

Quick Find Field Name

Blank Space	Active Sustainer	Anonymous	Capacity	County	Description
Section	Addressee	Assistant	Congressional Dis...	Created By	Do Not Call
Account Name	Address Standardi...	Asst. Phone	Contact Owner	Deceased	Dupe Key Last Nam...
Active	Age	Birthdate	Contact Record Type	Department	Dupe Key Normaliz...

Personal Information

Birthdate 4/16/2011 Age 86,183
 Marital Status Sample Marital Status Deceased
 Gender Sample Gender

Address Information

Mailing Address Suite 300, The Landmark @ One Market Household Copy Address Button
 San Francisco, CA 94105
 US

Address Standardization Status Address Standardize Contact
 Standardization Status

Mailing Address Type Sample Mailing Address Type Postal Mail Opt Out

You will then see a pop-up box asking you to name the section; you can accept the other layout defaults or alter them as you wish:

Section Properties

Section Name

Display Section Header On Detail Page
 Edit Page

Layout



1-Column



2-Column

Tab-key Order



Left-Right



Top-Down

OK Cancel

Click on "OK", then you will see a new section display for where the RapLeaf fields will be populated:

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons
Custom Links
Visualforce Pages
Custom S-Controls
Related Lists

Quick Find Field Name

Blank Space	Active Sustainer	Anonymous	Capacity
Section	Addressee	Assistant	Congressional Dis...
Account Name	Address Standardi...	Asst. Phone	Contact Owner
Active	Age	Birthdate	Contact Record Type

Personal Information

Birthdate 4/16/2011 Age 86,183

Marital Status Sample Marital Status Deceased

Gender Sample Gender

Address Information

Mailing Address Suite 300, The Landmark @ One Market
San Francisco, CA 94105
US Household Copy Address Button

Address Standardization Status Sample Address Standardization Status Address S

Mailing Address Type Sample Mailing Address Type Postal Mail Opt Out

Rapleaf Data

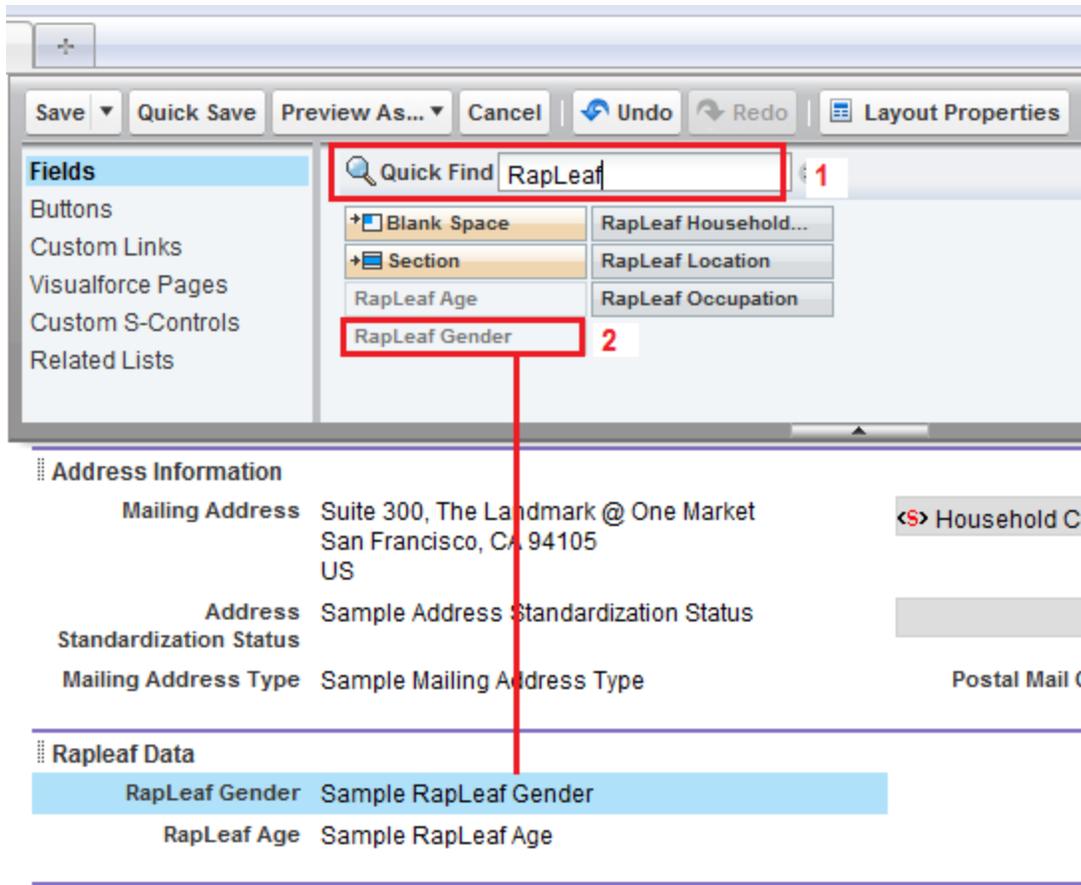
Phone and Email

Email sarah.sample@company.com Email Opt Out

Phone 1-415-555-1212 Do Not Call

Now you can drag-and-drop the desired fields this application populates automatically into the new RapLeaf section you created on the contact layout screen.

To filter out the RapLeaf fields for quick display and selection, type in "RapLeaf" in the Quick Find box at the top, and you will see the associated fields display. Simply drag and drop the RapLeaf fields you wish to display in the new section you created for them:



You have one thing left to edit on the contact layout, and that is to add a custom button so you can dynamically update the RapLeaf data for an individual constituent contact record being displayed. To do this, within the contact design/layout palette, on the left where the navigation choices are select "Buttons", then drag-and-drop the button labeled "Update RapLeaf Data" to the custom buttons section at the top of the contact screen:

Household Contact Layout Mini Page Layout Mini Console

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

- Buttons**
- Custom Links
- Visualforce Pages
- Custom S-Controls
- Related Lists

Quick Find Button Name

Clone	Edit	Promote to Househ...	Submit for Approval
Delete	Enable Partner Po...	Recalculate Donat...	Update RapLeaf Data
Disable Customer ...	Enable Self-Service	Request Update	View Partner User
Disable Partner User	Find Duplicates	Sharing	View Self-Service

Contact Sample

Contact Detail

Standard Buttons

Edit Delete Clone Sharing Request Update View Self-Service

Enable Partner Portal Login View Partner User Disable Customer

Disable Partner User

Custom Buttons

Volunteer Info Find Duplicates **Update RapLeaf Data**

Contact Information (Header visible on edit only)

Now click on the “Save” button for the contact layout palette, and you are done! You will now see the updated layout displayed for all contacts as below:

Contact Detail		Edit	Delete	Clone	Request Update	Volunteer Info
Name	Dawn Donator	Custom RapLeaf Button			Account Name	Dawn Donator
Nickname	Dawn	Active	<input checked="" type="checkbox"/>			
Middle Name		Lead Source				
Suffix		Primary Classification	<input type="checkbox"/>			
Professional Suffix		Head of Household	<input checked="" type="checkbox"/>			
Contact Owner	Doug Fierro [Change]	Anonymous	<input type="checkbox"/>			
PTA registration expires						
Description						
▶ Personal Information						
▶ Address Information						
▼ Rapleaf Data New RapLeaf Section						
RapLeaf Gender		RapLeaf Location				
RapLeaf Age						

An alternate choice is to insert the new RapLeaf fields directly in to the existing “Personal Information” section on the contact record – either way will work fine and it just depends upon your preferences.

TESTING

To test this out properly, you will need a valid name and email associated with the contact. The fields for “income” and “occupation” may not always populate with available data compared to the three fields of gender, age, and location.

I created a sample contact using our CEO’s name and email, and used the custom button on the contact screen. It did match one field, confirming his gender. I then tried it with the founder of Convio, and low and behold three fields were matched up by RapLeaf going on just a name and email!

▼ Rapleaf Data	
RapLeaf Gender	Male
RapLeaf Location	Austin, Texas, United States
RapLeaf Age	35-44

Other emails you can try out for testing that have field values matched by RapLeaf - not necessarily the CEOs of these other companies:

- steve@apple.com
- bill@microsoft.com

REPORTING

You can modify or create new reports using these new demographic fields offered by RapLeaf. An example shown below modifies the canned report for contacts by age, to instead change the filter to select by gender:

The screenshot shows the RapLeaf reporting interface. At the top, it says "Report Type: Contacts & Accounts" and "Contacts by Age". There are buttons for "Save", "Save As", "Close", "Report Properties", and "Run Report". Below this is a "Fields" section with a "Quick Find" search bar and a list of fields including "RapLeaf Gender". The "Filters" section shows "Show: All accounts" and "Date Field: Created Date" with a "Range: All Time" and "From" and "To" date pickers. A filter is applied: "RapLeaf Gender equals 'Male'". Below the filters is a "Preview" section with a table showing columns: "Salutation", "First Name", "Last Name", "Title", "Mailing Street", "Mailing City", "Mailing State/Province", and "RapLeaf Gender". The table shows one record for "David Donorfield" in "Dallas, TX" with "Male" gender. The "Grand Totals" section shows "1 records".

Then you can save this as a new report once you modify it to your satisfaction.

UNINSTALL

Should you wish to uninstall the Rapleaf package later, you can navigate to the "Installed Packages" view under App Setup and click on the uninstall button. Before doing this, you need to have the proper administrator privileges, and you need to edit the contact layout screen to remove the button that updates the RapLeaf data. After the uninstall, you will be able to download any RapLeaf append data that existed for your constituent contact records available via a CSV file format for a period of time should you need access to it. You will also receive an email shortly after uninstalling the package that will list your organization, name, and package ID.