

RapLeaf Salesforce integration application package for Convio Common Ground

Express 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 that can automatically populate fields on a contact record. The provided fields include age, gender, and location.

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.

ESTIMATED TIME TO GET APP WORKING: Express steps for an experienced Salesforce admin should be 15 minutes. There is an accompanying longer more detailed version of these install steps if you wish to use available at the download page listed above. 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 in to Convio Common Ground are available in a separate document at the listed download page 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 .

GETTING STARTED:

1. Click on this URL or cut-and-paste in to a web browser:
2. <https://login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04tC0000000IKsL>

3. Walk through the steps to install and then deploy the RapLeaf package, accept the defaults.
4. On the new RapLeaf tab, check the box to accept the usage terms and conditions, and then click on the button to get an API key.
5. Under Contacts tab, select a contact name and click on “Edit Layout”, use the design editor to put the new RapLeaf fields where you desire on the contact record page displayed. In the Quick Field box, type in “RapLeaf” to quickly locate them.
6. While editing the layout in the designer, then click on the Buttons section on the left navigation side, and place the “Update RapLeaf Data” button where the other existing custom buttons are located.
7. To test it out, you will need a valid name and email value on a contact record. Click on the RapLeaf custom button when viewing an individual record, or click on the batch update button on the RapLeaf tab. Here is a sample view of the result:

▼ Rapleaf Data

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

8. (Optional) Create new reports or update existing ones to display the new Rapleaf data fields.