

# Websites and Salesforce

## Overview

So, you want a new website. Excellent. *But wait... there's more!* I like to think of a website as not only a website, but an extension of your business systems - a customer management platform.



## On This Page:

- [Overview](#)
- [Features of your Website](#)
- [Communities](#)
- [Design](#)

Your "Website" includes

- Your CMS (eg WordPress, Drupal, Expression Engine, Joomla)
- Web Content
- Analytics
- Website Tracking
- SEO
- Shopping Cart
- Forums

Your Business Systems could be:

- CRM (eg Salesforce)
- Email Marketing
- Ordering and Distribution Systems
- Case Management Systems

The Accounting System includes

- Your Accounting System (eg Xero or MYOB)
- Your Bank and Merchant Facility
- Payment Gateway

Plus there may be other things that need to be factored in:

- Apps - eg an iPad or mobile phone app.

The bits we need to work out first are:

- What features are going to be included on the website
- Which bits of the website need to be in your CMS
- Which bits of the website belong in Salesforce
- How the integrations between the Website, Business Systems and Accounting Systems will work.

Here are the rules that I try to stick by for website projects:

- Just because it's on your website, does not mean it needs to be in your CMS. Your web presence that your client sees can be a multitude of systems, and be a seamless experience for you client.
- Web content belongs in your CMS. Data belongs in Salesforce.
- You have invested in Salesforce for a reason - don't try to replicate things in your CMS that belong in Salesforce.
- Don't reinvent the wheel. If there is a plugin or another service that does the job better - DO NOT custom code it (there are some exceptions to this for exceptionally large websites).
- Your client's experience is first and foremost.
- Just because your web developer is a guru at doing X, does not mean it is the best solution for you (eg they may be great at doing Gravity Forms, but [Form Assembly](#) may be the best solution for you).
- Nothing is sacred. Just because you currently use Drupal, it doesn't mean that WordPress or another CMS is the best for you, especially since your CMS will only be used for

Content now, not Data.

- Do things in stages - the back end processes could be manual for now, but as long as the front end looks good to your client that is what counts first up.

How do you know you have done it well?

- There is no such thing as generating a report out of your CMS - because there is no data in your CMS.
- There is no such thing as exporting data from your CMS - because data is not in your CMS, and the rare time it is, it is automatically created into Salesforce.
- All financial transactions are reportable from Salesforce.
- All financial transactions in your accounting system can be traced back to the source in Salesforce.
- Everything you know about your customer is in Salesforce - EVERYTHING.
- Some guidelines
  - 10% data, 90% content - use a good CMS with simple Salesforce Integration.
  - 90% data, 10% content - use Salesforce sites.
  - even mix of data and content - split it up into the CMS and Salesforce - it can still be seamless to the end user.
- Remember, what your Web Developer calls content, we probably call it data, and data belongs in Salesforce.

When to not use a CMS at all?

- You have multiple features on your website that require your customers to log in.
- You want to have everything on Salesforce and no separate CMS

Look at [Communities](#) (see below) or a very basic CMS like [CMS Force](#) or the most fully featured Salesforce CMS [Orchestra CMS](#).

## Features of your Website

These are the features that may be on your website. A few of these features may be specific to NFP's only (eg Donations).

These are quick tips only, and not a substitute for a full requirements analysis, and for many reasons these suggestions may not be suitable for your requirements.

[Web Content](#) | [Social Integration](#) | [Contact Us Form](#) | [Newsletter Subscription](#) | [Other Forms](#) | [Donations](#) | [Peer to Peer](#) | [Subscriptions / Membership](#) | [Member Only Content](#) | [Directory](#) | [Events](#) | [Shop / E-Commerce](#) | [Publications and Resources](#) | [FAQ / Q&A](#) | [Volunteer Registration](#) | [Forum](#) | [Campaigns / Causes / Microsites / Multi Sites](#) | [Survey](#) | [Website Tracking / Marketing Automation](#) | ["Google Juice"](#) | [Search](#) | [Privacy Policy](#) / [Terms and Conditions](#)

### Web Content

eg, news, blog posts, static content.

Your basic web content belongs in your CMS. That is what a CMS does, and does well.

### Articles / Publications / Downloads

For more in-depth articles, especially ones that have to have approval processes, eg:

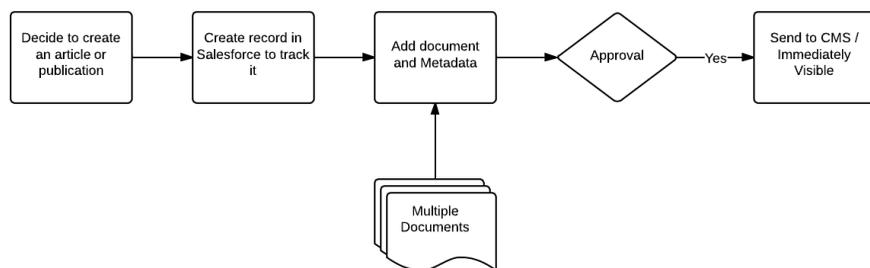
- media releases
- annual reports
- info sheets
- publications
- guidelines
- templates
- government submissions
- talking points
- briefing papers
- position statements

- product brochures

Think about tracking the content creation in a custom object in Salesforce (eg Article Title, Publication Date, Status, Writer, Editor, Approvals etc). The final content can be then added to your CMS as content or an attached PDF file.

You can even create your content in Salesforce, but it is not user friendly at all, and let's face it - we will never ever stop people from using Word. But try [Confluence](#) or [Google Docs](#) for a true collaborative editing experience. Of course, if you already use a document management system like SharePoint then keep the document in there. Just don't keep the document on the S: Drive and don't email it around.

Inside your CMS you may want to have a custom object (table, custom post type etc) that stores all documents with metadata, such as category, synopsis, publication date, image etc. Here's a thought - add those metadata fields to the custom Articles object in Salesforce, and when the article is approved for publishing in Salesforce, automatically add it to your CMS database via the Salesforce and CMS API. This is a one way update only - any modifications are done in Salesforce and pushed through to the CMS. The CMS custom object should be read-only.



Also think about having full content or a large excerpt of the document visible on your website. Salesforce used to do their release notes in PDF format for each release. They now do a single website <http://docs.releasenotes.salesforce.com/> with easily searchable and findable content. This is also much better for accessibility and screen readers (You can still attach a PDF for download). Of course, that content will be stored in Salesforce.

Note: for documents that you want to track that a customer has downloaded them, see below for shopping cart for digital resources.

## Social Integration

Twitter, Facebook, Sharing etc.

Just about all CMS's have excellent plugins that will help with the following:

- Showing your latest tweets
- Showing your latest facebook posts
- Like us on Facebook
- Share our content everywhere.

## Contact Us Form

For a very basic form use your standard CMS forms and use Salesforce [Web To Lead](#).

Otherwise see Lead Management below.

## Newsletter Subscription

People subscribe to your newsletter, and you want to capture those details in Salesforce plus add them to your Email Marketing list.

- Embed your [Mailchimp](#) or [Campaign Monitor](#) or [Exact Target](#) form onto a page or widget area on your website.
- Let the details flow through to the Email Marketing app, then into Salesforce (if necessary).

- Note: these apps can be used for Web to Lead also, if all Contact Us enquiries will result in being subscribed to the newsletter.

### **Mailchimp Example**

Ease of Setup: Easy

Additional apps pricing: \$0

Ongoing app pricing: \$0 depending on how many emails you send.

Your website has a sign up box with name, email address and maybe a few additional fields.

Your potential customer likes what they see on your website and decide to subscribe to your mailing list.

We use the Mailchimp sign up form to immediately subscribe the customer to the mailing list when they fill in their details. Using the Salesforce Mailchimp app, you can see that that person has subscribed to the mailing list. Optionally, the app can create a Lead in Salesforce for you to qualify and make further contact with the customer.

Of course, depending on your processes, it may not be necessary to qualify the lead at this stage, and it could be automatically added to the Mailchimp list, and even bypass Salesforce. This is completely dependant on your business and your processes.

At any time you can quickly subscribe your Salesforce Contacts to your newsletter or other email marketing (complying with the Spam Act, of course).

If the customer unsubscribes, you can immediately see this status in Salesforce and you can do full reporting on which of your contacts in Salesforce are clicking on which links in your newsletters.

Also see Website Tracking / Marketing Automation below.

When using the AAKonsult app as detailed below, we can also automate the process of subscribing the person who makes a donation or purchases a product to your mailing lists.

## **Other Forms**

### **Lead Management**

For anything more than Name, Address and "What is your Query?" create a custom form in [Form Assembly](#).

Leads are generally from people that you have not had any contact with previously.

Remember all fields in the form need to be created in Leads, and then either Accounts, Contacts and possibly Opportunities (depending on the info). Use [AppShark Lead Conversion](#) or similar to customise the Lead Conversion process.

A lead in Salesforce can be used for any of the following:

Commercial:

- Lead for the sale of products or services
- General Enquiries.

NFP's:

- General Enquiry
- Sponsorships
- Partnerships
- Volunteering
- Bequests (notification of a future bequest). (See <http://includecharity.com.au/> for more info about bequests).

For enquiries where you know that they should be in your Salesforce already these should not be created as Leads. Create a custom object related to Contacts (or better still use Cases), and use a

Form Assembly form or Communities.

Ensure that "Leads" that come through are not Cases. Have a very clear section on your website for Support, Help etc, to ensure that Cases come through to Cases, not Leads.

## Case Management

If you have a support@ email address or take customer enquiries over the phone you need cases.

Case forms are often quite involved. Suggestions in order of complexity (lowest to highest) and functionality (lowest to highest):

- use [Web to Case](#) but the matching of the person's details to existing Contacts and Accounts is problematic
- Use [Form Assembly](#) to create the record in Cases.
- Expose a custom Visualforce Form via Salesforce Sites that creates a record directly into Cases.
- Use [Communities](#) - members log in and there is a cases tab visible for them to see and comment on their existing Case and create new Cases. (Not an option for Cases created by the general public).

## Donations

People give you money, via donations, and you need to issue them a tax receipt, record their details, and the transaction in Salesforce, then in your accounting system so it reconciles with your bank statement.

There are a few ways you could do this:

- Create a custom form on your website, with custom code to:
  - Make the payment via a payment gateway (eg EWay).
  - Handle the credit card rejection or acceptance
  - Issue a receipt
  - Add the record to Salesforce - usually as an Opportunity.
  - Handle refunds (rare for donations, but may be required - eg they put an extra zero on the payment form).
  - This solution also requires a SSL Certificate, and usage of the API to create records should always use a separate user in Salesforce. See [Salesforce and Websites - Technical Details](#) for more info.
  - This solution is going to cost big dollars to build and maintain.
- Search through the [AppExchange](#) for one of the donation management solutions that work with Australian Payment Gateways.
  - Some of these solutions are very expensive and overkill for what you probably need.
  - You will probably still need to create a custom form on your website.
- Just use [Payments2Us](#) - see example below.

Then set use One Saas to automatically create the payments in your Accounting System (see [Salesforce to Xero](#)).

## Manual Payments

There will always be a need to handle manual payments. This might be that people have just directly put money into your bank, or they have sent a cheque in (hopefully you are making credit card donations so easy that cheques will become less and less). You need to be able to record the donation in Salesforce and in your Accounting system - do you want to do it twice? or just once. Add the payment to Salesforce and have that create the invoice in your Accounting System directly via One Saas (see [Salesforce to Xero](#)).

## Appeals

Send a personalised email out to your donors to ask them to contribute to an appeal. The emails can contain a unique tokenised URL for that person that pre-fills all their contact details in. (tokenised means that it is a lot more secure and it makes it difficult to "hack" and expose other donors' details). The donor can then update their address details and cleanse your data for you. Once they submit their donation, their details are directly updated into Salesforce.

## Regular Giving

Similar to the process for one off payments but you need to charge the credit card each month. Let's hope your payment gateway will allow you to set up monthly charging of credit cards, and then you will need to work out a way to get that regular charge into your Salesforce. And what about direct debits. Will your payment gateway allow you to do direct debits?

*Please don't be like one client where we found that the developer had created a custom object to record successful regular giving payments which meant the regular giving payments were not in Opportunities, no reports were including the regular giving amounts and the roll-up summaries of how much a person donated was not being shown on their contact page.*

Or just use [Payments2Us](#) which handles regular giving directly from Salesforce via the Payment Gateway.

You will also want to issue receipts for every payment and / or Annual statements for tax purposes. In fact, you should be able to issue annual statements to anyone based on the data in Salesforce. You could easily create this to go out in mid July for all donors (allow time for all last minute donations to come through. I generally donate on 30 June at 11pm).

## Workplace Giving

Workplace Giving is a payment made by the Workplace on behalf of the individual. This money comes out of pre-tax salary so it is great for the individual donating. The workplace will probably send you a spreadsheet each month with the transactions and then make a payment via your website or deposit it to your bank account. To process these:

- Add the payment against the workplace.
- Make sure the workplace is nominated as a Workplace Giving workplace. (eg Account Type).
- Use the [Nonprofit Success Pack - NPSP's Soft Credits](#) feature to ensure the payment is acknowledged against the individual.

## Celebration / Funeral / In Memoriam Giving

This happens in a few ways:

- At a funeral the family asks for donations to "XYZ Charity" in lieu of flowers.
- For a wedding or other special occasion, donations are requested in lieu of gifts.
- A person makes a donation to a charity to remember a loved one.
- Funeral directors will hand out envelopes to take donations in.

Note: In Memoriam fundraising can also be done by Peer to Peer fundraising sites - see below.

There are usually three parties to In Memoriam Donations

- The person making the donations - a Contact in Salesforce
- The next of kin or person who is organising the donations - a Contact in Salesforce
- The person who the donation is in memory of or celebration for - usually just a text field.

Usually you will want to send a report to the Organising person saying how many donations were raised for this person's memorial or celebration. This does not usually give the names of the donors. Depending on your policies you can do this via an automated email. Care needs to be taken that every name is entered in the same way, or manually checked before the email is sent out. When the donation comes in it will need to be manually recorded against the organiser so all the donations are calculated against them. The organiser should not receive any soft credits for the donations.

## Donations in Kind

Donations of goods or services. How to handle:

- Have a different Record Type for GIK donations. These may or may not be included in your Donation reporting, depending on your accounting setup and what reporting you are doing.
- Some GIK donations have to go through an official valuation process. Have stages set up for that valuation process to track it.
- When the value is known, add it to the Opportunity Amount field.
- In the [Nonprofit Success Pack - NPSP](#) decide if that Opportunity record type should get rolled-up similar to other monetary donations.

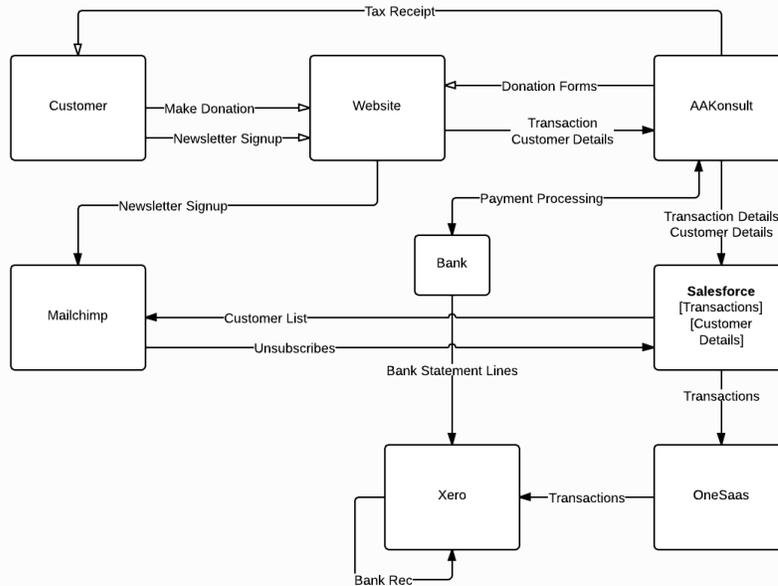
- The List of Opportunities becomes your official register of Goods and Services Received In Kind.

### NFP Donation Example

Ease of Setup: Moderate

Additional apps pricing: see [Payments2Us](#), One Saas see [Salesforce to Xero](#).

Ongoing app pricing: Yearly fee plus monthly fee plus transactions for merchant account. See [Payments2Us](#). Monthly fee for One Saas see [Salesforce to Xero](#).



As a Not For Profit organisation, donations are your lifeblood. Why use another service to accept donations and take a cut, when you can manage it yourself and get the full donation.

It is important to track the details of every donor, and to know who your larger or regular donors are. And of course, you want to use the mailchimp or similar to subscribe donors to your mailing lists (as above).

This is where the [Payments2Us](http://aakonsultpayments.com/) app (<http://aakonsultpayments.com/>) comes in. The payments app does all the hard work of web forms, payment gateways and Salesforce integration to give you a one stop solution. (Also see the video of the AAKonsult app here <https://www.youtube.com/watch?v=t6zjEHEnEfM>)

Using the payments app, create a web form to display on your website. You can have many forms on your website, depending on the reason for the donation. The app has many different styles of forms available.

There are two ways to do the donation forms - as a stand alone page, that can be styled to match your website, or as an embedded form (using iFrame or Lightbox). The level of integration depends on how much you want to spend on website development to get the look exactly how you want. An example of the most basic way of doing the form is this site <http://schoolforlife.org.au/support-us/donate-or-sponsor/> that has simple links to the donation form. Other examples can be seen on the sites linked from the [Pricing Page](#) of AAKonsult's website.

### Here's how it works

The donor comes to your website and makes a donation. When they get to the donation page they are not actually on your website anymore, they are on a web page exposed by your Salesforce. They enter their CC details and the CC is processed. They immediately

get issued a tax receipt, and their details and the donation is created in Salesforce. Salesforce now becomes your single source of the truth for all donations made - a full record of donations made are kept in Salesforce, linked to the contact record of your donor. (It will automatically create the new donor if that person is not already in your Salesforce). The great thing about this solution is that there is NO record of donations stored inside your CMS, which could cause you a security headache. Don't have data stored in your CMS when it only belongs in your Accounting System or in Salesforce.

Via the payment gateway that comes with the payments app, and your merchant facility, the money ends up in your bank. Using a third party app like Dime for CRM or OneSaas (see [Salesforce to Xero](#)), the transaction details are synced from Salesforce to Xero, and the transaction is sitting in Xero as an invoice waiting for the bank feed to update, and then you can quickly match the bank feed transaction with the Invoice in Xero and voila, a fully reconciled bank statement. However, there is one catch here. Most, if not all, payment gateways will only show one transaction on your bank statement - that is the total of the transactions received on that day. With Xero, you can match multiple invoices to one bank statement line, so that should not be much of an issue. Full audit tracking can be done from the Invoice in Xero back to the source transaction in Salesforce. The Salesforce transaction stores only the last 4 digits of the credit card, and also captures the IP address and browser details of the person who made the payment.

(Of course, if you don't use Xero, there are still possibilities, and depending on your accounting system will depend if this transfer of the transaction from Salesforce is an unattended automated sync, or a manual download and upload).

## Peer to Peer

People do the Marathon, get friends to sponsor them to do it, and that money is donated to you, often in the name of a person or team. These are usually done by commercial apps like [Everyday Hero](#), [GoFundraise](#) or similar. Plus there are many crowdfunding sites popping up. These apps take a cut of your fundraising. If you are not interested in giving them a cut try [Cause I Can](#) that is built on top of Salesforce. It may be possible in future to integrate this into AAKonsult Payments.

The problem with Cause I Can is it is not as feature rich for the person organising the donations as the commercial sites are. And let's face it, you are not really in a position to stipulate which app people use if they want to give you money, so you really have to support all of them.

The other issue with these commercial apps are the manual nature of them - they send you a spreadsheet or you can download a spreadsheet once per month. There is no integration with Salesforce or even a tool like Zapier, so you are forced to create an import. A tool like [Skyvva](#) will help import the file to multiple records, but you still have to handle matching existing contacts or creating new ones. Better still, import the spreadsheet into the AAKonsult Payment Transactions object and let the wonderful AAKonsult matching process do the rest - and then it will create the Opportunities for you too!

## Subscriptions / Membership

For a member based organisation, managing subscriptions and memberships is vital. It needs to be easy, automatic, reliable, and meet your business rules. You will want your membership data to be available in Salesforce. Whether this being just for a 360deg view of the customer or for knowing that their membership is valid for providing the services that you provide. Unless you have member only content on your website, there is NO reason to store member data on your CMS. (See below for Member Only Content).

So, apart from choosing the right subscription level, the process is exactly the same as taking donations. You can build it yourself and suffer all of the costs and issues that come with this approach, or use [Payments2Us](#) to give you fully customisable Subscription platform. Some of the great features of the AAKonsult platform are:

- Automated subscription renewal emails containing a unique tokenised URL for that person that pre-fills all their membership details in. (tokenised means that it is a lot more secure and it makes it difficult to "hack" and expose other members' details). The member can then update their address details and cleanse your data for you. Once they submit their payment, their details are directly updated into Salesforce.
- Unlimited number of subscription levels, including subscription levels that are not visible on the website, and are only available to set up internally in Salesforce (eg for complimentary memberships).
- You can pro-rate fees to match up to a standard yearly renewal date.

- Memberships can be date or "issue" based (eg for magazine subscriptions).
- Renewal periods can be monthly, quarterly or yearly.

## Member Only Content

Member Only Content is quite common for member based organisations. As discussed above, you don't want to store your membership details on your website, because it belongs in Salesforce. But you need to have the members be able to log in, and see the content that is applicable to their member level, so you will need to store basic member authentication details on your website. If it is just for login purposes and no profile management, then just store a member ID that is the same in the CMS and Salesforce.

Want a cheap way to do member profile updates without resorting to communities, or syncing data between the website and Salesforce? Have a link in the member content area where the member asks to update their profile details. Submit that request to Salesforce which sends an email to the member with a pre-populated [Form Assembly](#) form. They submit the form and the details are updated into Salesforce. You would not do this for password changes though.

For a mid ranged cost option, when they want to change their profile, query the data from Salesforce, pre-populate a form behind a SSL encrypted page on your website, and submit the data back to Salesforce. Again passwords are problematic and you will need a very secure way of handling passwords, so this may become expensive to code.

For the best option see Communities below.

## Directory

You have a directory of services, or people that you want to display on your website.

As this is data, it belongs in Salesforce. These people or organisations are probably in your Salesforce already so there is no way you want to replicate this on Salesforce.

This is where Salesforce Sites is great. This is just a visualforce page, that queries data from your Salesforce and is made available publicly. You can either style it to match your website, or put it in an iFrame on your website, or even push the data to your CMS and display it directly on your Website. All edits would be done in Salesforce and pushed to your website.

## Events

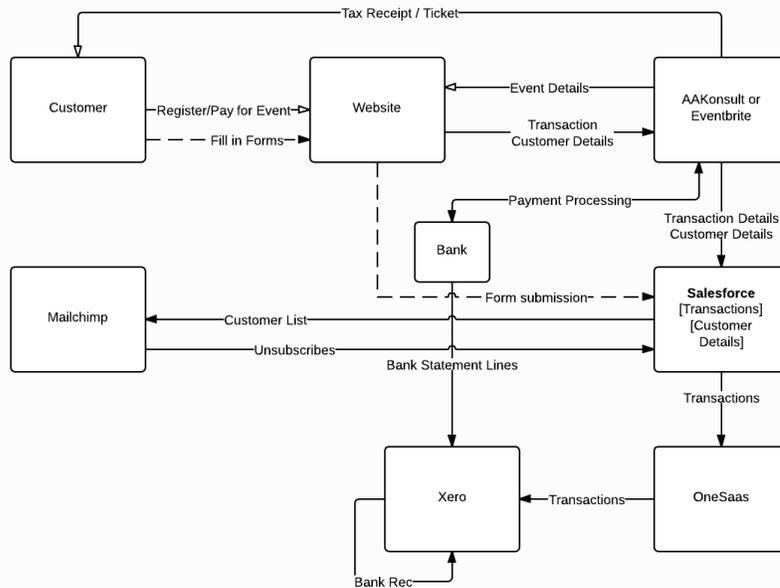
People sign up for events that you are promoting, you want to record their details in Salesforce, track that they have signed up and paid for the event, and then ensure the transaction appears in your accounting system so it reconciles with you bank statement.

### Events Example

Ease of Setup: Moderate

Additional apps pricing: see [Payments2Us](#), One Saas see [Salesforce to Xero](#).

Ongoing app pricing: Yearly fee plus monthly fee plus transactions for merchant account. See [Payments2Us](#). Monthly fee for One Saas see [Salesforce to Xero](#).



Your website is where the listings for all your events are displayed to your potential attendees. These are created in Salesforce Campaigns and displayed on your website, either using the standard [Payments2Us](#) app features or synced to your website from Salesforce.

Using the [Payments2Us](#) app Event features, you add registration and payment functionality to your events.

The attendee registers for the event, and pays by credit card to ensure their place. They are immediately issued a ticket and receipt, and their details, the transaction for the payment and the registration for the event are transferred to Salesforce.

Salesforce now becomes your single source of the truth for all registrations and payments made - a full record of events are kept in Salesforce, linked to the contact record of your donor. When the person attends the event, you can mark off their attendance in Salesforce to keep a record that they actually attended. (You can even do this with a great [barcoding app](#), and scan attendees' tickets as they come through the door).

And of course, using the [Mailchimp](#) Salesforce plugin, we subscribe all attendees to your mailing lists.

The money trail is handled in Salesforce and your accounting system in the exact way that donations are handled.

Some other options: You may already have events working well in Eventbrite. Luckily Eventbrite integrates nicely with Salesforce so we can set up similar functionality using your existing Eventbrite setup.

## Shop / E-Commerce

People buy products from your website shop. You want to record their details in Salesforce, track which products they have purchased, and then ensure the transaction appears in your accounting system so it reconciles with you bank statement.

There are a few options here:

- Build your own shop on your website, handle payments from your custom payments solution (see Donations above).
- Build your own shop and handle payments via [Payments2Us](#).
- Use an existing shop software like [Big Commerce](#), [Magento](#) etc and use OneSaas to create the products in Salesforce. (Be careful with fees for this, you may need a separate payment gateway if you are taking donations or other payments via Salesforce directly).
- Use the Shopify plugin to the [Payments2Us](#) app.

## Shopify

Shopify is a bit like Salesforce inasmuch as it is a basic platform that does one job and does it well, then you add any number of apps to make do it exactly what you need. Some examples:

- **Customer Specific Pricing** - different pricing based on membership level or any other criteria.
- **Search as you type**
- **Recommendations** - Like Amazon recommendations - "you may also like"
- **Drill Down** - drill down by product features
- **Advanced categorisation** - categories in shopify are called Collections.
- **Digital Downloads** - with expiring links
- **Interactive Guide** - guide your clients to find the right products (note the demo is terrible but it looks promising as to what it can do - if you can write some IF this THEN that statements that will help your customers find your products you can write a guide.
- **Metafields** - Fields, fields and more fields!
- **Tiered Pricing** - buy 3 for the price of 2.
- **Widgets** - show products on your main website.
- **Social Media Sharing**
- **Multiple Images**

Here is a [great looking australian shopify site](#) that has many of these features. Beware that just like Salesforce, Shopify can get expensive with all of the options added in. Here is an [interesting article](#) about that.

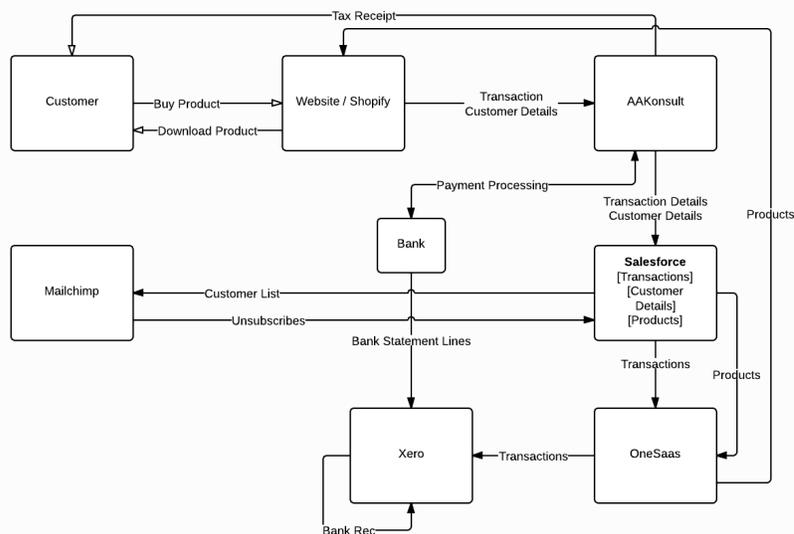
Shopify can on its own domain or be a subdomain on your site - eg <http://shop.example.com>. It can be styled to match your site, so that it is almost seamless to your end user.

### Example - Shopify Integration

Ease of Setup: Advanced

Additional apps pricing: see [Payments2Us](#), One Saas see [Salesforce to Xero](#). Plus [Shopify pricing](#) and [Apps](#).

Ongoing app pricing: Yearly fee plus monthly fee plus transactions for merchant account. See [Payments2Us](#). Monthly fee for One Saas see [Salesforce to Xero](#).



Now we are getting more serious. As well as accepting donations and selling events, you also sell products. It could be as simple as a few lines of branded merchandise or e-books, which are available for immediate download or a full range of products and / or services, some requiring shipping.

For this, you need a full e-commerce solution consisting of a product catalogue, a shopping cart, and of course your merchant facilities. And of course, as with donations and events, you want to have a full record of all purchases made in Salesforce so you

can do full reporting on which products are selling to which customers, and see which products individual customers have purchased.

The AAKonsult payments app has built in integration with Shopify (<http://www.shopify.com/>).

Again, because of the integration between the payments app and Salesforce, the money trail flows smoothly into Salesforce, then from Salesforce to your accounting system via OneSaas or Dime, ready for the transaction to be reconciled from you bank feeds.

With all these options, the possibilities of a Shopify shop are almost endless and need detailed planning before we implement a solution for you.

See this website <http://shop.schoolforlife.org.au/collections/christmas-appeal> for a very simple shop and this video <https://www.youtube.com/watch?v=fMMQegv9Xqk> for how it was set up.

## Publications and Resources

Like products in your shop, but given out for free, and usually digital products.

You need to track:

- Which customer downloaded which resource - and create an entry on their customer profile.
- How many of each resource were downloaded

You can do this via your Shopify Site, and ask them to check out with a \$0.00 amount - they will not be taken to a payment form. The "sale" will still be created in Salesforce and matched against the client name.

NOTE: Still manage the creation of the digital resources in Salesforce as per Articles / Publications / Downloads above, but when they are ready to go on the website, use a custom trigger to add the product to Shopify via [their API](#).

## FAQ / Q&A

Any part of your Salesforce that is not sensitive customer data can be exposed to your website. You can create your own custom object for FAQ's and answers, or use Solutions and expose them on a Sites Page, or sync them to your website CMS.

## Volunteer Registration

Create a custom form on your website and use [Web To Lead](#) or use a [Form Assembly](#) form to create a Lead directly. Volunteers should be created as "Leads" and go through a qualification process before they are added as Volunteers in Contacts.

## Forum

Let's face it, unless you use Chatter in Communities, there is no way of doing Forums with Salesforce. And if the business has asked for a forum, and you proposed chatter, you would have to do a lot of convincing to help your client understand that Chatter can be a Forum. Chatter is really cool, but is just not what most people would call a Forum.

You can get Forums that work with your CMS or stand alone Forums. [Discourse](#) is a new style of Forum software that looks interesting, and it's open source. Currently you have to host it yourself but it will be cloud hosted soon. They have a nice [option for NFP's](#) including setup and hosting.

Do you have only a Forum? Do you need all people in your Forum to be in Salesforce? Or do you have a Forum plus Member Content or other Login areas on your website?

So, similar to member only content, have the member details synced from Salesforce to the CMS or Forum software and handle the profile updates / password changes with some custom code.

Even if you use communities for everything else that requires a login and just member only content on your CMS and Forum, you are still going to have to build an identity management system to handle authentication across multiple systems. There are some very cool new features with Salesforce Identity now that should make this easier for your developers, but it is still a custom developed solution.

## Campaigns / Causes / Microsites / Multi Sites

You want a special looking site for a particular event or cause, or you have a sub brand that needs a website with a different look and feel. Most good CMS's these days provide a multi-site option (WordPress, Drupal and Expression Engine do).

For a simple Campaign or Cause page you may just be able to use a page on your main website with different images on the page - not a different theme. There are plugins for WordPress that can help with different looks for different pages (see <http://wordpress.org/plugins/jonradio-multiple-themes/> for an example).

Remember that for any Cause or Campaign you can set up a completely different donation form with [Payments2Us](#). This will help you track where the donations came from.

## Survey

There are survey apps that can be added to Salesforce. It depends on the complexity of the survey. For the most complex of surveys you could use [Qualtrics](#), which integrates with Salesforce. For medium level complexity use [Survey Gizmo](#) or [Clicktools](#). There are apps that run inside Salesforce like [Timba Surveys](#), and then the form tools like [Form Assembly](#) can do a good job of surveys also.

## Website Tracking / Marketing Automation

This takes simple Email marketing further. Set up drip marketing campaigns and / or tracking cookies on your website to know exactly how your potential customers are using your website, and send them targeted communications based on previous history with them, and how they are using your website. (This level of marketing automation is fantastic, but it is pricey. Apps like [Exact Target](#), [Marketo](#), [Pardot](#), and our very own, aussie built native app [Dashcord](#) do this).

## "Google Juice"

Analytics, Adwords and SEO. I won't discuss these here because they are handled as part of your Website. If you want anything integrated with Salesforce, you will want a proper Marketing Automation system - see above.

## Search

Most default search in websites is bad and only does full text search and does no weighting of searches. Of course there are custom search plugins. Inside Communities, Search is just like Salesforce search - and the users can only see exactly what you allow them to see, but the search is broken down to the individual objects just like in Salesforce.

## Privacy Policy / Terms and Conditions

Important. Review it if you have not done so in the last 6 months. See <http://www.oaic.gov.au/privacy/privacy-act/australian-privacy-principles>. Don't take this stuff lightly. It is super important.

## Communities

Throughout this page I have been mentioning communities. My rule for using communities is if you have more than a few features that you want your clients to log in for. Communities is the true self service portal. Yes communities is expensive, but so is custom development and the ongoing management of syncing data between systems. Licensing of communities comes in two flavours - Named Users and Active Logins per Month. You would use Named Logins for a small Community of Practice type group, and Active Logins for customer sites. If you have variable amount of logins over the year (eg your push for donations prior to tax time means that many people sign up or modify their profile), then logins can be averaged over the year.

You may have a staged approach. Customers can donate, register for an event and subscribe to your newsletter without being a community user, but then upgrade to a community user when they sign up to Volunteer or sign up for Membership.

## Design

Note: there is not one mention of your website design on this page. That is almost limitless. Just ensure that the look and feel and branding are consistent (enough) across all sites. This will be much easier if you keep your main site design simple. Maybe go to town with fancy stuff on more static microsites.