

Database Connector for Salesforce.com

Organizations frequently use different systems to manage their online and offline fundraising activities. Maintaining constituent information in multiple silos makes it difficult for your organization to get a complete view of your constituents and their relationships with your organization — putting your fundraising activities at a serious disadvantage. By synchronizing data between your offline database and your online marketing activities, your organization will be on its way to creating fundraising campaigns that drive results.

Convio's Database Connector for Salesforce.com serves as a real-time bridge between the applications, saving administrative time, ensuring data integrity and strengthening your constituent relationships. With best practices built-in, the Connector helps your organization leverage constituent data stored in Salesforce, driving higher levels of engagement through more targeted and personalized campaigns.



Know Your Donors



Empower Your Fundraisers



Coordinate Your Campaigns

By employing the robust features of the Salesforce API, the Connector communicates securely and efficiently over standard Internet connections — requiring no complicated infrastructure. Leveraging these Web-based services, the Connector also provides advanced functionality beyond a simple communication exchange.

Features and Benefits

In addition to providing connectivity between your two databases, the Connector can be used to implement and enhance business processes between the two systems, including:

Ensure Data Integrity. Automatic duplicate detection searches your Salesforce database when new constituents register online to detect possible matches and reduce duplicate records. Constituents engaging in the online channel are accurately linked to their offline record, ensuring that your organization has access to all activities for use in the fundraising process.

Personalize the Constituent Experience. Drive higher levels of engagement through more targeted and personalized campaigns that leverage constituent information stored in your Salesforce database.

Link Online and Offline Campaigns. Cross-reference tools allow your organization to automatically see new data elements such as campaigns or groups from your Salesforce database and establish the relationship necessary to link your online activity to your offline.

Streamline Data Management. Save administrator time, training, and the need for sophisticated technology knowledge by creating an automated, "hands free" approach to data synchronization and a single process for handling file creation, bi-directional data transfer, duplicate management and error handling.

- Capture all pledge, TeamRaiser® and online gift transactions with the appropriate Salesforce contact record automatically.
- Minimize duplicates and data integrity challenges by incorporating data management best practices within the product functionality.
- Build an online group from an offline segment for targeted online communications through email and web content.
- Map online donation forms to offline campaigns for multi-channel results analysis.
- Group recurring online gifts together in Salesforce for better donor management
- Schedule daily automatic contact record synchronizations
- Review and resolve potential duplicates before they impact your operations.



Austin | Berkeley | Washington, DC
888-528-9501 | 512-652-2600 | info@convio.com | www.convio.com

Convio, the Convio logo, TeamRaiser and Constituent360 are trademarks, registered trademarks or service marks of Convio, Inc. All other names are trademarks, registered trademarks or service marks of their respective owners.