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Salesforce Integration Questions & Answers

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Questions and Answers

1. *Is IETF's Meeting Registration System (MRS) a custom built application or is it through a 3rd Party?*
 - a. *If a 3rd Party, can IETF provide the name of the system? Does this system have a standard Salesforce integration?*

ANSWER: It is a custom-built system managed by the IETF Secretariat, [Association Management Solutions](#) (AMS). It does not have a standard Salesforce integration. Please see deliverable 3 in the RFP for more information.

2. *Are the developers of the IETF MRS staff members or 3rd Party?*
 - a. *If a 3rd party, can IETF provide the name of the vendor/developers we will be working with?*

ANSWER: Please see the answer to question 1 above.

3. *Can examples of the 20 reports needed by IETF staff be provided?*

ANSWER: While the lead administrator for the Salesforce database has previous Salesforce user experience, she does not have in-depth familiarity with building reports and would like some commonly used reports created during the course of this process. Examples might include:

- A Campaign Gift Report
- A Donor-Specific Giving History Report
- Gift Tracking for an Individual Giving Appeal
- A Report of Grant Due Dates / Donor Check-In Dates
- An Annual Donation List for End-of-Year Reconciliation
- A Prospect List by City/Region/Country
- Outstanding Invoices & Acknowledgement Letters

4. *Does IETF envision utilizing any of the Sales Cloud functionality other than entering in Gift Entries (i.g. Leads, Campaigns)?*

ANSWER: We intend to use multiple built-in features of Sales Cloud including structured Campaigns, Dashboards and Pipeline Tracking. We will explore Billing Automation through Salesforce (aka Invoicing and acknowledgements) as part of a later phase. We do not expect to implement more AI-related functionality like the Einstein scoring or Asset Management.

5. *Does IETF plan on utilizing any of the Service Cloud functionality (Cases, Contracts, etc)?*

ANSWER: We do not intend to use Service Cloud.

6. *Can you provide IETF's Data Schema?*

ANSWER: As all of the required integration is either through data export or by calling Salesforce APIs, our data schema is not relevant.

7. *Can you provide IETF's Technical Architecture Diagram of the current infrastructure?*

ANSWER: This is significantly more information than is required to respond to this RFP. The chosen Integration Partner will be provided information as needed on a project basis.

8. *Is AMS ARO being fully replaced by Salesforce or is IETF going to continue to use AMS ARO?*

- a. *If not, is the data export a one-time task or ongoing need?*
- b. *If AMS ARO is to be used as well, will Salesforce be the single source of truth?*

ANSWER: The use of AMS ARO for fundraising purposes is planned to cease and Salesforce will become the single source of truth for our donor relationships. However, we may need to repeat the data export/import process more than once if this transition takes longer than expected.

9. *Can you confirm that the only planned initial use case for the CRM is to manage donations? And that integration with the MRS will be limited to importing donations from the MRS into Salesforce. Integration with the website donation form will be limited to importing donations from the website into Salesforce.*

ANSWER: In its initial launch, Salesforce will be utilized only for donation and relationship management. Integrations between the MRS and PayPal are limited to donation-related information.

10. *Are you open to alternatives to integration with the website donation form that may include better and/or more automated integration with Salesforce?*

ANSWER: Yes, we are open to alternatives, provided the functionality is comparable if not better, and the price-point is within range.

11. *Does IETF solicit recurring donations, pledges, in-kind, or other forms of donations other than directly via the website and MRS?*

ANSWER: Yes our intent is to solicit recurring donation, pledges, in-kind, and other forms of donations primarily from face-to-face requests, grant requests, and fundraising appeals in the future.

12. *We see at least two types of donations (Endowment and Supporters Fund). Is the process the same for these and they are just categorized differently or is there more complexity involved? Are there other types of donations?*

ANSWER: Yes the process is the same for these and they are just categorized differently. We also have a handful of in-kind donations (primarily technology-related). As our fundraising program evolves, we anticipate receiving grants and programmatic funding.

13. *For the email integration requirements, can you share a complete list of current or future email clients that must be accounted for (i.e. Outlook, Apple Mail, Thunderbird, etc.)? If you have details about any users that leverage web-based versus desktop clients that would be helpful.*

a. *Do you want every email to be automatically logged or do you want a prompt to log emails?*

ANSWER: The IETF email is IMAP based and, while no specific client is mandated for staff and contractors, all expected users of email integration use the Apple email client on both laptops and mobiles. We are exploring a third party web interface but that decision has not been made. Our preference is to have the ability to select what emails are logged, but we will consider alternative mechanisms.

14. *Can you provide a list of third-party systems/software that are required to be integrated with your Salesforce org? Also please provide clarity on how many of those integrations need to happen in real-time or batch-wise.*

ANSWER: Please see the Deliverables section of the RFP. For the API based integrations, a decision on real-time vs batching will be made in discussion with the developers.

15. *Is there a requirement of 2-way integration with any software?*

ANSWER: Please see the Deliverables section of the RFP.

16. *Do you have any preference for an Authentication Mechanism?*

ANSWER: No.

17. *Is there any middleware involved in the transaction?*

ANSWER: This question has insufficient context for us to answer.

18. *Do we need to capture failure of online transactions?*

ANSWER: No.

19. *For data Import from AMS ARO do we need to upload the data manually or do we need to build integration?*

ANSWER: We do not have a preference. Please see the answer to question 8 for more information

20. *Will we get cleansed data from AMS ARO to import into the system?*

ANSWER: Yes.

21. *Is there any preference on APIs (REST API or SOAP API)?*

ANSWER: REST or GraphQL is preferred. We do not want SOAP.

22. *For maintaining Donation and Donor details do we get "NON PROFIT" Salesforce License or do we need to custom build it?*

ANSWER: IETF has a Salesforce representative secured who will set up our nonprofit Salesforce account, complete with licensing.

23. *Is there any CTI integration involved ? If Yes, is there any middleware involved to manage? Do we need to manage call drop functionality?*

ANSWER: There is no CTI integration involved.

ENDS