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Salesforce Customizations

Salesforce Architecture, Design, Implementation and Training

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Fall 2014 List

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General Productivity

Application Name	3 rd Party Vendor	Details	Link on AppExchange	Est. Dev. Time
<i>Mass Update and Mass Edit from List View</i>	Salesforce Labs	<ul style="list-style-type: none"> - Mass update one field for multiple records (the save value for all records) - Mass edit multiple standard fields for multiple records (e.g. address, phone) 	https://appexchange.salesforce.com/listingDetail?listingId=a0N300000018mbBEAQ	0.25
<i>Mass Updates Tasks, Activities, and Create Multiple Tasks</i>	Versatile Capitalist	<ul style="list-style-type: none"> - Update multiple tasks and activities at once from a list view - Create the same task for multiple accounts, organizations, and/or leads 	https://appexchange.salesforce.com/listingDetail?listingId=a0N300000031leFEAS	0.25
<i>Google Links</i>	Software Anywhere	<p>Add useful Google links directly to Contact, Lead, and Account records; puts the ease of google searching within Salesforce</p> <ul style="list-style-type: none"> - Google Maps - Google Directions and Reverse Directions - Local Weather and Time 	https://appexchange.salesforce.com/listingDetail?listingId=a0N300000031VB7EAO	0.25
<i>Multi-Select Picklist Frequency Reports</i>	Marzapps	<ul style="list-style-type: none"> - Create reports based on <u>one</u> picklist value in a multi-picklist field 	https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B53brEAB	0.25
<i>Mass Update and Mass Edit from List View</i>	Salesforce Labs	<ul style="list-style-type: none"> - Mass update one field for multiple records (the save value for all records) - Mass edit multiple standard fields for multiple records (e.g. address, phone) 	https://appexchange.salesforce.com/listingDetail?listingId=a0N300000018mbBEAQ	0.25
<i>Side Calendar</i>	CloudClickware	<ul style="list-style-type: none"> - See your calendar on every page. - Days with events are highlighted. - Drill down to see events for the day. - Create a new event with one click. 	https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B50VmEAJ	0.25
<i>Account Hierarchy</i>	AppShark	<ul style="list-style-type: none"> - Customize your account hierarchy page. - Provides global view, including Contacts! 	https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B4xkEEAR	0.25
<i>Data Exporter</i>	Mindfire Solutions	<ul style="list-style-type: none"> - Export records from the list view of any object and parent object fields. 	https://appexchange.salesforce.com/listingDetail?listingId=a0N300000018mbBEAQ	0.25

		- No longer need to recreate the view/list in Reports to export.	0000B566AEAR	
<i>Attachment Notifier</i>	Collabrax	- Lets you see which tasks and events within Salesforce have an attachment. - View notification in related lists (e.g. Activity History) as checkmark	https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B4xkEEAR	0.25

Communications

Application Name	3 rd Party Vendor	Details	Link on AppExchange	Est. Dev. Time
<i>S-Docs Free Document Generator (PDF, Word, Excel)</i>	ME2 Systems	<ul style="list-style-type: none"> - Generate multiple documents at once using a button - Uses templates for auto-document generation - Ability to email the generated documents - Can pull data from parent objects and child records - Free account has two templates only (\$8/mo for unlimited templates) 	https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003HeuPEAS	1.00
<i>MST Mass Email</i>	MST Solutions	<ul style="list-style-type: none"> - Provides Mass Email button that can be added to Contact/Lead list views, and Campaign detail page - Can be customized for custom objects with Contact/Lead relations 	https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B5ESSEA3	0.5
<i>aiEasyLabel Lite</i>	Alpha Index	<ul style="list-style-type: none"> - Produce mailing labels for Leads, Contacts & Accounts from a list view. - Saves label to PDF. One template available for free. 	https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B4bsGEAR	0.25
<i>Free Gmail to Salesforce Integration</i>	Ebsta	<ul style="list-style-type: none"> - Add emails and sync your calendars. - Instantly view contact information and related accounts, opportunities, and activities. - Free for up to 3 users. 	https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B4xVrEAJ	0.50
<i>MailChimp for Salesforce</i>	MailChimp	<ul style="list-style-type: none"> - Sync MailChimp and Salesforce data. - Manage subscribers and create custom queries. - Does not yet sync to Campaign Member Status 	https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B3byfEAB	0.50

Student (and Parent) Management

Application Name	3 rd Party Vendor	Details	Link on AppExchange	Est. Dev. Time
<i>StudentForce</i>	Studentforce.com LLC	<ul style="list-style-type: none"> - Designed by students for students - Manage day-to-day learning activities 	https://appexchange.salesforce.com/listingDetail?listingId=a0N300000016aUcEAI	N/A
<i>SchoolForce</i>	Acumen Solutions	<ul style="list-style-type: none"> - Designed specifically for schools - Comprehensive student performance management - Student demographics, attendance, behavior, etc. 	https://appexchange.salesforce.com/listingDetail?listingId=a0N30000007rBVWEA2	N/A
<i>Attendance Tracker</i>	ES	<ul style="list-style-type: none"> - Track students attendance to programs (e.g. after school, camps) - - \$50 p/user p/year, 10 user minimum 	https://appexchange.salesforce.com/listingDetail?listingId=a0N30000005uqk2EAA	3.00

Volunteer Management

Application Name	3rd Party Vendor	Details	Link on AppExchange	Est. Dev. Time
<i>Volunteer Management</i>	Salesforce Labs	<ul style="list-style-type: none">- Track details of volunteer events- Associate users and/or volunteers to those events- Track accumulated volunteer hours for contacts	https://appexchange.salesforce.com/listingDetail?listingId=a0N300000016bhiEAA	0.50
<i>Volunteers for Salesforce</i>	DJH Consulting	<ul style="list-style-type: none">- Manage volunteer events and people- Manage positions, shifts, and hours- Volunteer Shift calendar- Mass edit and assign volunteer hours	https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003JBggEAG	1.00

Donor/Fundraising Management

Application Name	3 rd Party Vendor	Details	Link on AppExchange	Est. Dev. Time
<i>Donation Split</i>	The Cloud for Good	<ul style="list-style-type: none"> - Record how donations can be “spent” between programs - Split donations into different designations (custom) 	https://appexchange.salesforce.com/listingDetail?listingId=a0N300000059P3fEAE	0.50
<i>Budgets</i>	Salesforce Labs	<ul style="list-style-type: none"> - Manage your budgets in one place - Report on your budgets and see real-time view of allocated funds 	https://appexchange.salesforce.com/listingDetail?listingId=a0N300000016aZwEAI	0.50
<i>BudgetingForce</i>	Salesforce Labs	<ul style="list-style-type: none"> - Manage budgets and purchase requests - Four levels of accountability – budgets, program budgets, budget lines, purchase requests - Link budget lines to specific vendors/contractors - Charts visualize committed vs. uncommitted and program distribution 	https://appexchange.salesforce.com/listingDetail?listingId=a0N30000004g2xOEAO	1.00
<i>Add Multiple Opportunity Tasks</i>	Salesforce Labs	<ul style="list-style-type: none"> - Add multiple tasks in one page to an opportunity - Add up to 5 tasks at one time, or can customize for more tasks 	https://appexchange.salesforce.com/listingDetail?listingId=a0N300000016chEAA	0.50

Event Management

Application Name	3 rd Party Vendor	Details	Link on AppExchange	Est. Dev. Time
<i>Eventbrite Sync</i>	Eventbrite	<ul style="list-style-type: none"> - Sync the registrants of your Eventbrite event directly to Salesforce - Automatically creates or updates existing contacts and leads in Salesforce - Adds the contacts and leads to the campaign using the sync tool 	https://appexchange.salesforce.com/listingDetail?listingId=a0N30000005uwzXEAQ	0.25
<i>Events</i>	Salesforce Labs	<ul style="list-style-type: none"> - Manage public or private events - Can be used for event, conference, and briefing center management - Connect and track events, speakers, venues, rooms, tracks, sessions, registered attendees, budgets, and expenses 	https://appexchange.salesforce.com/listingDetail?listingId=a0N30000005vK3CEAU	1.00
<i>Campaign Combiner</i>	Groundwire Consulting	<ul style="list-style-type: none"> - Add campaign members from one or multiple existing campaigns into a target campaign - Use the same tool to <i>exclude</i> campaign members who belong to other campaigns - Saves time in adding campaign members 	https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003IIDHEAO	0.25

Miscellaneous

Application Name	3rd Party Vendor	Details	Link on AppExchange	Est. Dev. Time
<i>Mass Lead Converter</i>	Salesforce Labs	- Convert multiple leads if they belong to the same organization	https://appexchange.salesforce.com/listingDetail?listingId=a0N30000004g33vEAA	0.25
<i>Assign Case to Self</i>	Salesforce Labs	- Adds button to case layout so that a user can reassign case to him/herself	https://appexchange.salesforce.com/listingDetail?listingId=a0N300000016caOEAO	0.25
<i>Case History with Email</i>	Salesforce Labs	- View a history of actions on a single case in a chronological timeline - Able to send an email containing all public information to the associated Case contact	https://appexchange.salesforce.com/listingDetail?listingId=a0N300000016aSzEAI	0.25
<i>Zapier</i>	Zapier	- Automates and integrates multiple CRMs - \$15 p/mo (free if logo is placed on site; 15% discount for nonprofits) - Can integrate Salesforce with Gmail, Mailchimp, Quickbooks Online, Office 365, Basecamp, Wordpress, LinkedIn, Eventbrite, Box, Dropbox, GotoWebinar, Facebook, Smartsheet, Instagram, ConstantContact, Weebly, etc.	https://appexchange.salesforce.com/listingDetail?listingId=a0N30000007pJYIEA2	2.00
<i>Formyoula</i>	Solution Rock	- Create forms within Salesforce that map to any Salesforce object. - Intuitive forms that work on desktop and mobile	https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B4ijNEAR	0.50-1.00