

Salesforce1 Mobile for Nonprofits





Introductions



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What is Salesforce1?



“It means a lot of things to a lot of people... we're starting to see evidence of Salesforce1 being talked about as an API layer, as a user interface, and as a mobile app...marketing positioning will focus the message on Salesforce1, as much driven from case studies as collective confusion and outcry.”

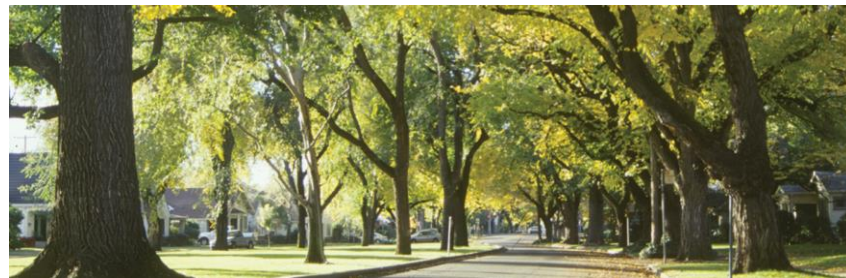
-Dave Manelski, Salesforce (Hub)

How can it be used for the
nonprofit sector?

Sacramento Tree Foundation

Mission

Building healthy, livable communities
in the Sacramento region by growing
the best urban forest in the nation.



Case Study: Description



"We needed to leverage a mobile solution to capture GPS points and other tree related data in real time to facilitate the work of our field staff. With help from Idealist Consulting and Salesforce1 we are building a mobile application that meets our needs and is seamlessly integrated with our Salesforce.com database."



Project Scope

- Technology
- Team / Skillsets
- Project Management Methodology
- Timeline / Total Hours

Application Walk-through

salesforce 14

Sandbox: idealist

Home Leads Accounts Contacts Tree Locations Tree Species Trees Neighbor Shadings Payments Google Navigation Monitorings +

Create New...

Custom Links
Power of Us Hub & Community

Shortcut
Calendar
Unresolved Items

Recent Items
2617 Ellenbrook Drive
John Doe
167 North 2nd Street
Test Test
June Hudspeth
Colleen Cadwallader
Idealist Consulting

Recycle Bin

Tree Location
2617 Ellenbrook Drive

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Back to List: Contacts

Notes & Attachments [6-] | Open Activities [1] | Trees [1] | Activity History [3] | Approval History [0]

Tree Location Detail

Edit Clone Review Map Tree Location Map

Information

Location	2617 Ellenbrook Drive	Location Status	Owned
Location Type	House	Account	Individual
Site Name		Primary Contact	John Doe
Location Street	2617 Ellenbrook Drive	Tenant	
Location City	Rancho Cordova	Cross Street	
Location State	CA	Thomas Guide Grid Number	
Location Zip		Gate Code	
Special Instructions			

Mailing Info

Mailing Address Same as Location

Mailing Street

Mailing City

Mailing State

Mailing Zip

Trees Summary

Most Recent Tree Siting	2/27/2014	Total PVBs for this location	\$0
Most Recent Tree Delivery		Trees at Location	1

System Information

Legacy Record ID

Created By [Colleen Cadwallader](#) 1/13/2014 7:23 AM

Last Modified By [Idealist Consulting](#) 3/19/2014 12:21 PM

Edit Clone Review Map Tree Location Map

Notes & Attachments

Chat


forward thinking, advanced solutions




☰

My Tasks ▾

New Task

<input type="checkbox"/>	 Site Visit 329 Bald Mountain Road	Today
<input type="checkbox"/>	Site Visit 2617 Ellenbrook Drive	Today
<input type="checkbox"/>	Initial Site Visit John Doe 167 North 2nd Street	Today



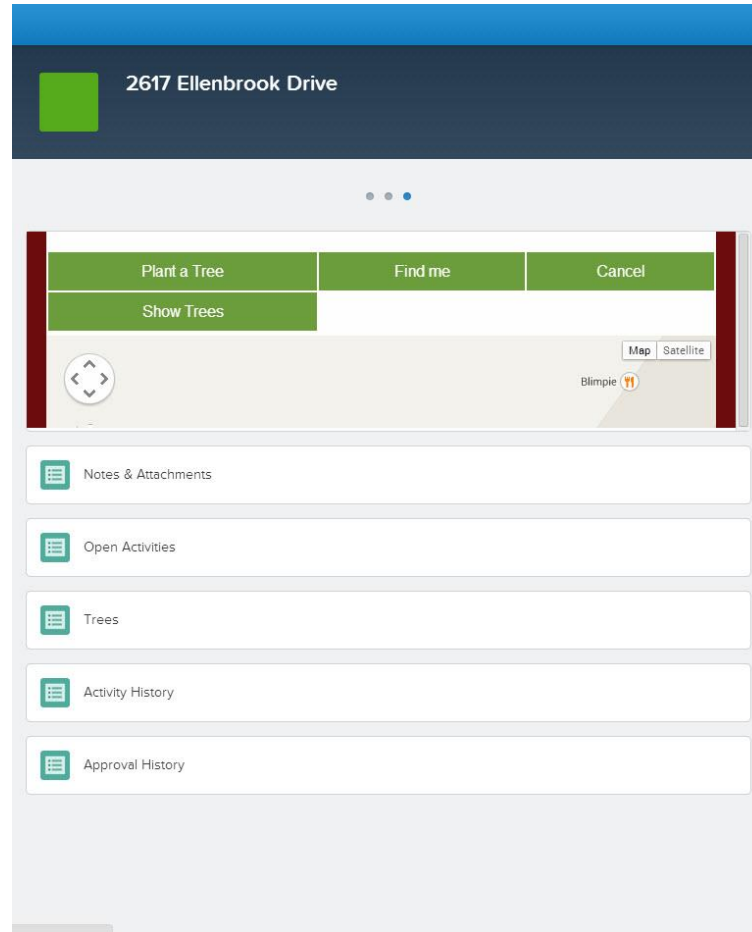
 2617 Ellenbrook Drive

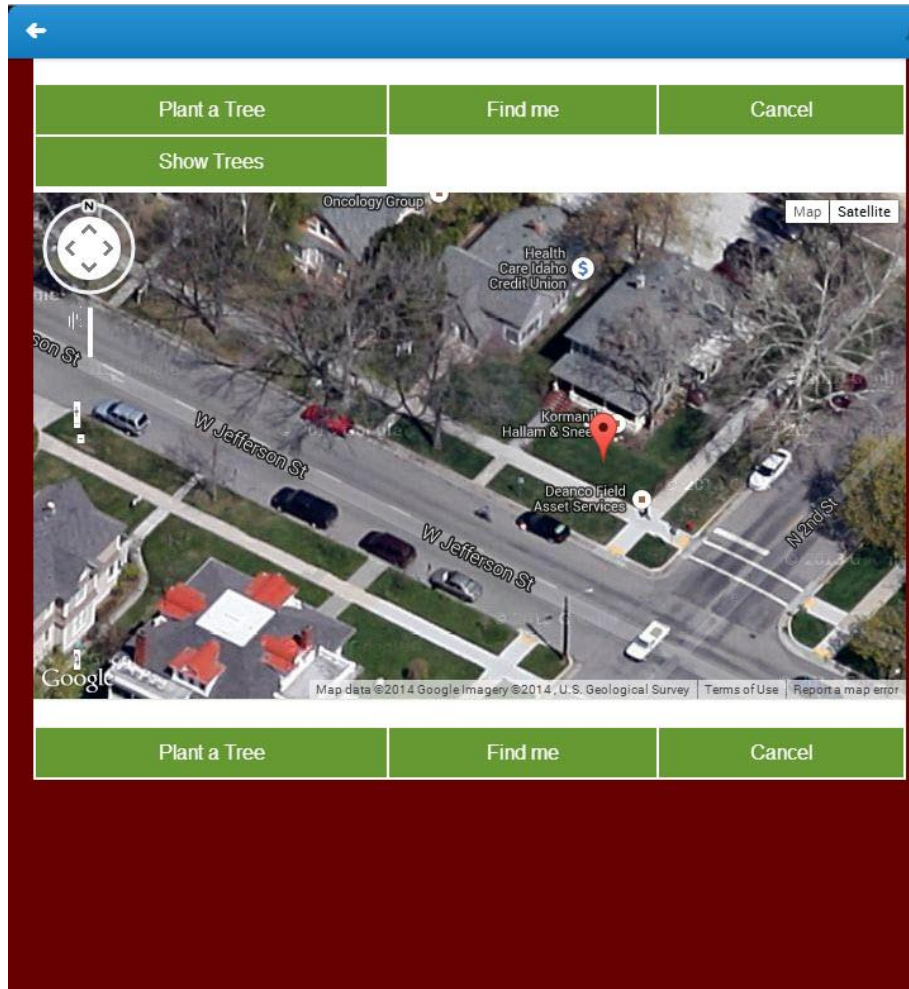
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[Edit](#) [Clone](#) [Review Map](#) [▼](#)

INFORMATION

Location 2617 Ellenbrook Drive	Location Status Owned
Location Type House	Account Individual
	Primary Contact John Doe
Site Name	Tenant
Location Street 2617 Ellenbrook Drive	
Location City Rancho Cordova	Cross Street
Location State CA	Thomas Guide Grid Number
Location Zip	Gate Code







Tree Edit
New Tree

Tree Edit

Information | = Required Information

Direct Shade Distance	<input type="text"/>	Direct Shade Orientation	--None--
Tree Species	Red Maple	Location	2617 Ellenbrook Drive
Color	Red	Tree Program Classification	--None--
Community Shade Tree	<input checked="" type="checkbox"/>	Lot Side	--None--
Project Name	--None--	Tree Status	To be Validated
Neighbor Shading Notes	<input type="text"/>	Reserved Until Date	<input type="text" value="3/21/2014"/>
Resite	<input type="checkbox"/>	Forester	Idealist Consulting

GPS Points

X Coordinate	43.614024	Y Coordinate	-116.20365
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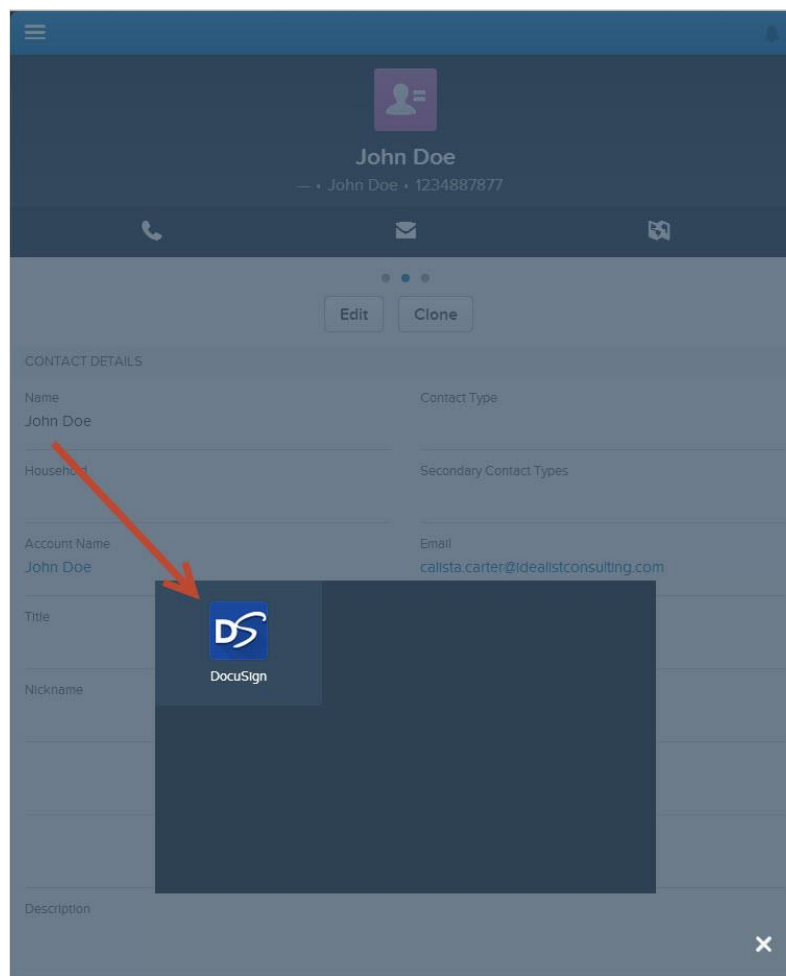
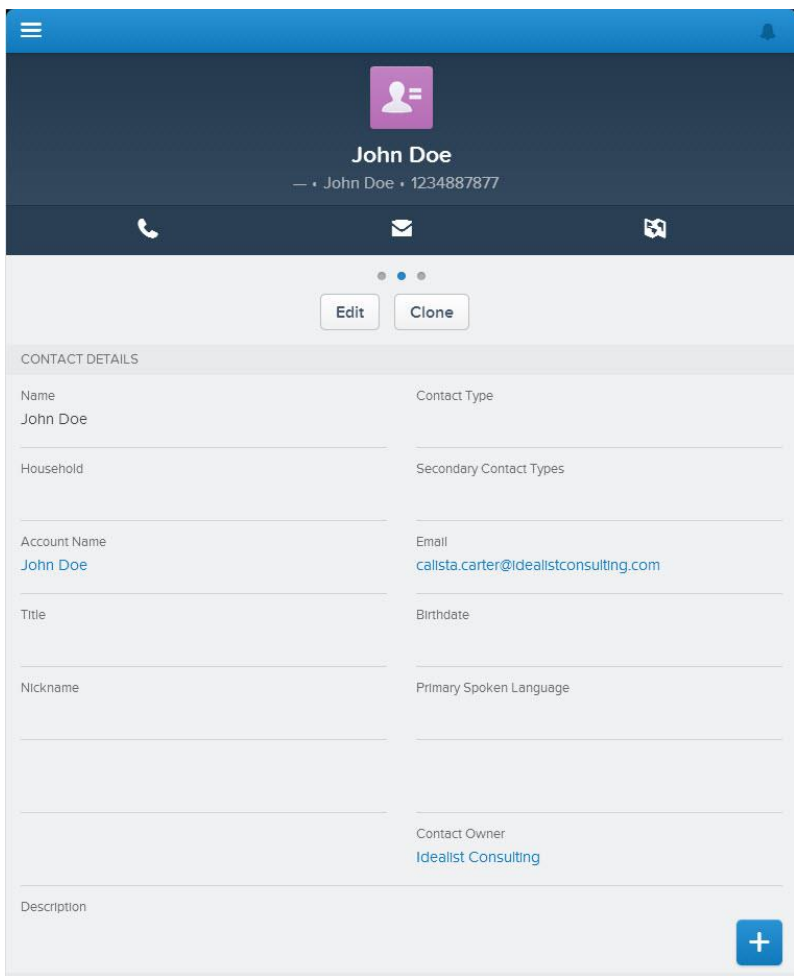


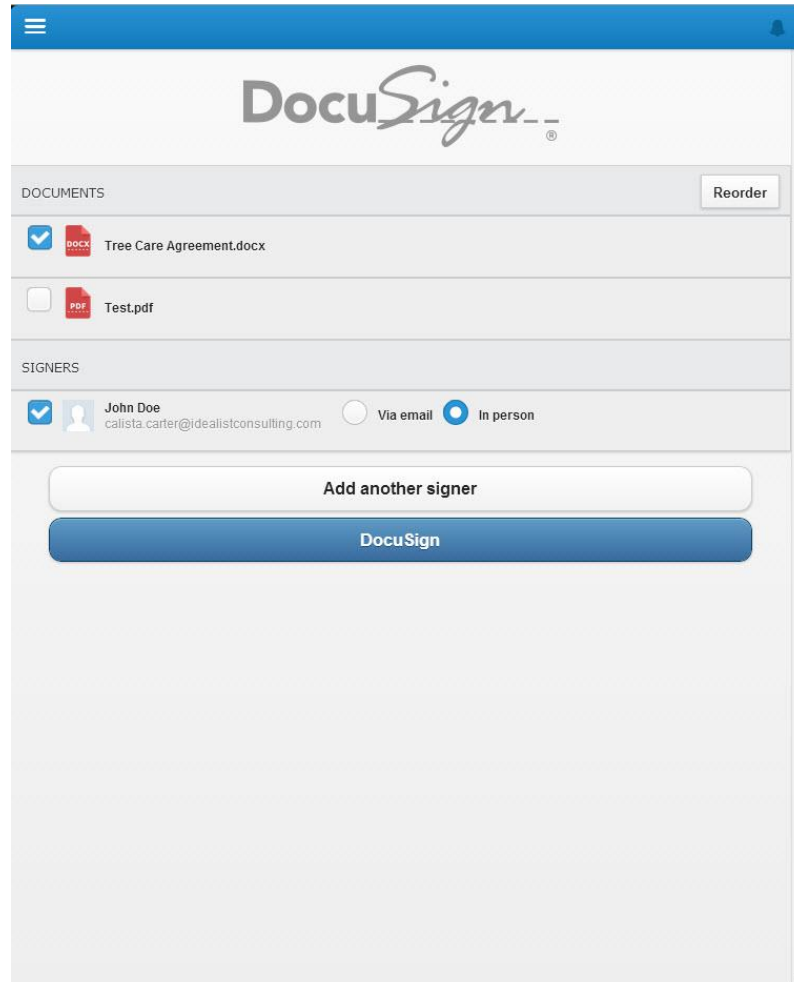
Name John Doe
Address 167 North 2nd Street, San Jose, California, United States,
Phone 1234887877
Email testlrmail@gmail.com

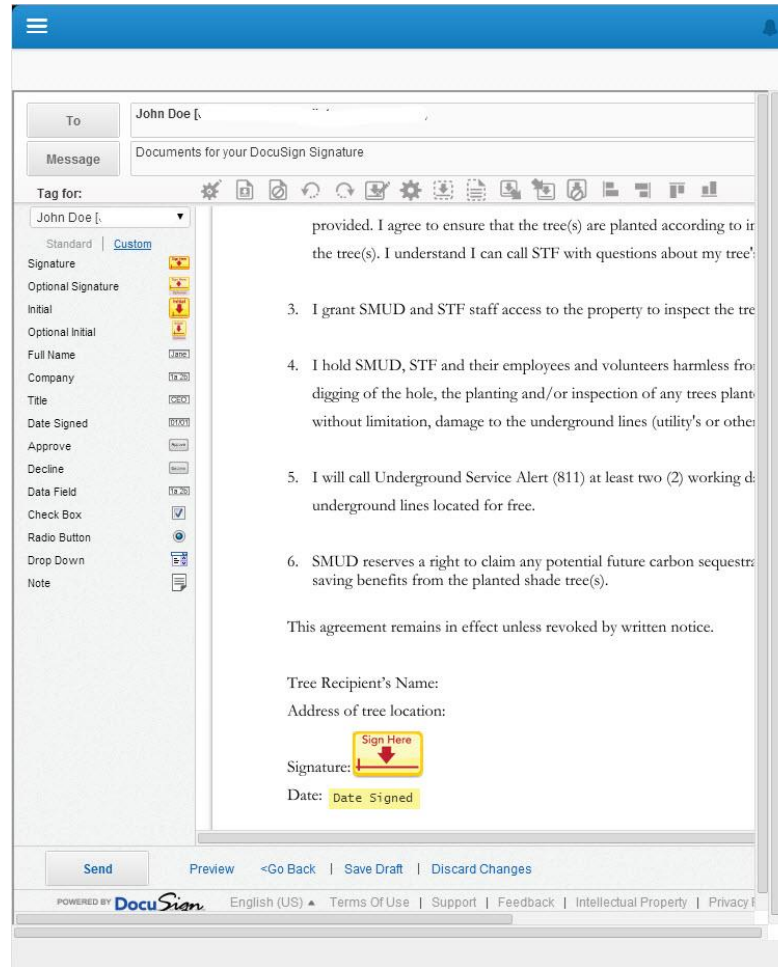


Tree	Name	Species	Direct Shade Distance	Direct Shade Orientation	Siting Date	Delivery Date
A	Tree - 46542	Red Maple	15	SE	2/27/2014	

Send Email Cancel

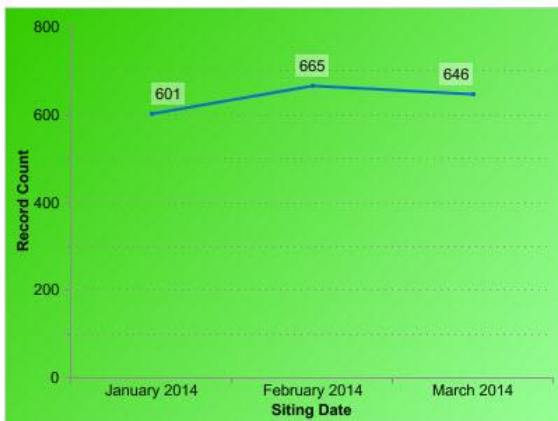




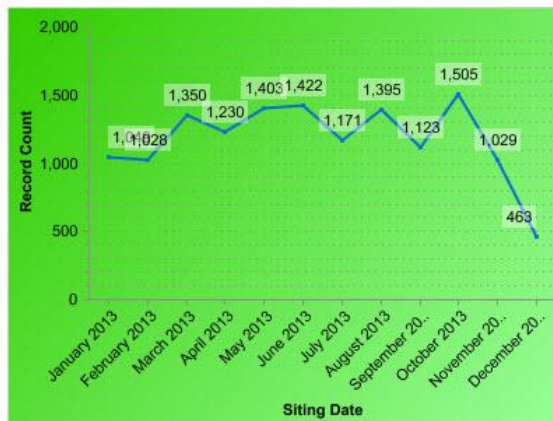




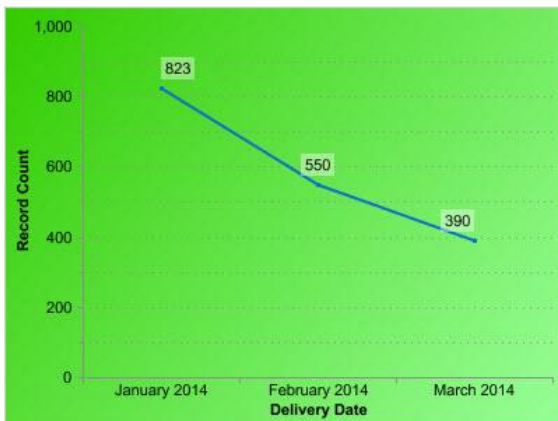
2014 Trees Sited



2013 Trees Sited



2014 Trees Delivered



2013 Trees Delivered



Q & A



Resources

[Idealist Consulting Website](http://www.idealistconsulting.com)

<http://www.idealistconsulting.com>

[Case Study](http://idealistconsulting.com/blog/sneak-preview-salesforce1-implementation-sacramento-tree-foundation)

<http://idealistconsulting.com/blog/sneak-preview-salesforce1-implementation-sacramento-tree-foundation>

[Power of Us Hub: Salesforce1 - Mobile group](http://powerofus.salesforcefoundation.org/publogin)

<http://powerofus.salesforcefoundation.org/publogin>

[Salesforce1 Ready on the AppExchange](https://appexchange.salesforce.com/collection/salesforce1-ready)

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