

This Tutorial will showcase how to a. **create a PFG form, add and map a Get Paid Adapter and add and map Salesforce adapter.**

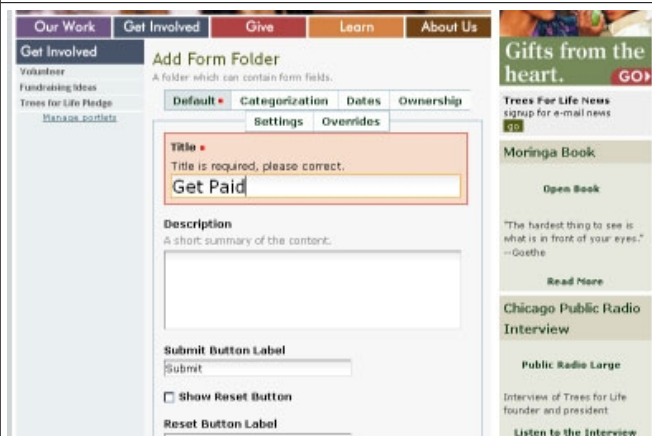
* Please make sure you have the products and adapters properly installed and in working order.



1..Navigate to the place where you want this form.



2. Click on "Add New" then scroll down to "FormFolder".



3. Give a title to the form folder. (I called it "GetPaid" this will appear as a link in the side-navigation).

4. Everything else is optional. GO ahead and scroll down and click "save".



5. Go back to "Contents" [located under the solid green bar]



6. Go ahead and check everything and hit "delete"

* this will delete the Default PFG form.



7. Go back to "Contents" then select "add new" from the top bar, scroll down to "GetPaid Adapter"

Get Involved
Volunteer
Fundraising Ideas
Trees for Life Hedge
Get Paid
Banana Pudding

Add Getpaid Adapter

Getpaid formgen goodies

Default • Overrides Payables mapping

Title •
Donate

Get Paid Form Template
 Multi Item cart add
 One Page Checkout

Get Paid Payment Button Label
Make Payment

Form fields to Payables mapping •
Associate the paths of form fields with payables.

Form Fields	Payables

[Add new row](#)

Save Cancel

heart. GO

Trees For Life News
signup for e-mail news
GO

Moringa Book



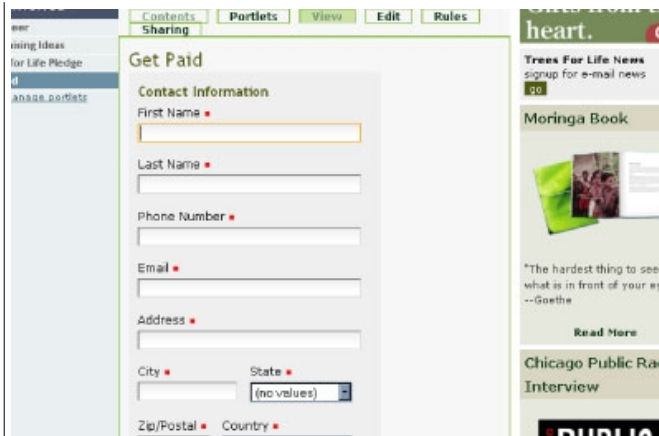
"The hardest thing to see is
what is in front of your eyes."
--Gautier

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8. Give a title (I called it donate). Select "one page checkout" -- give your payment button a label or leave it default. Click "Save"

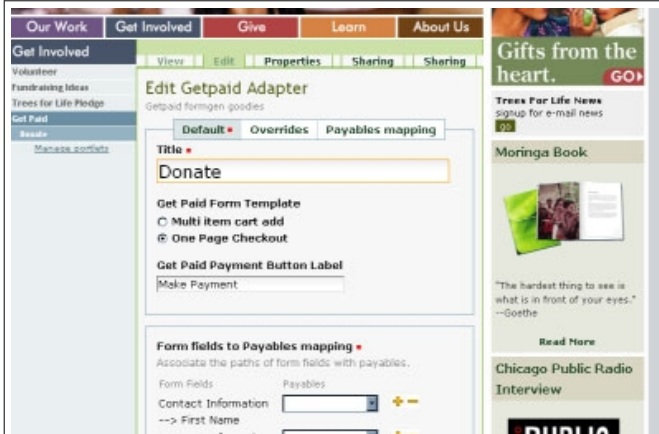


9. Now you can see the Get paid default form.

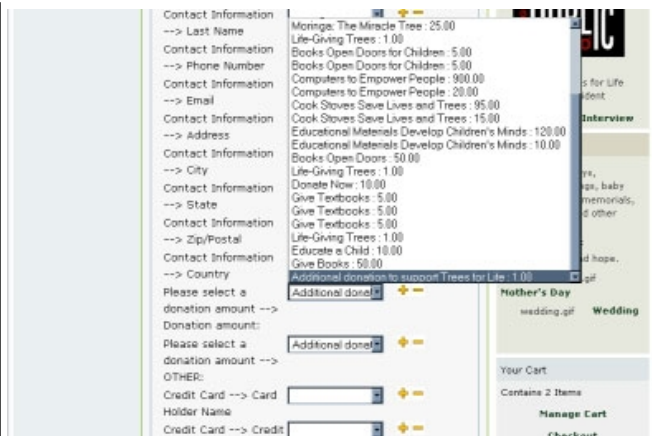


10a. Click on "Contents"

10b. Click "Donate" [in green font, located in the left column in the form on the center of the page]



11. Click "edit" [under the solid green bar]



12. Map both of the “Donation amount fields” with “Additional Donation account 1.00”

Congrats! You have just mapped your product and have a form ready for your users.

*** Now we will begin mapping Salesforce**

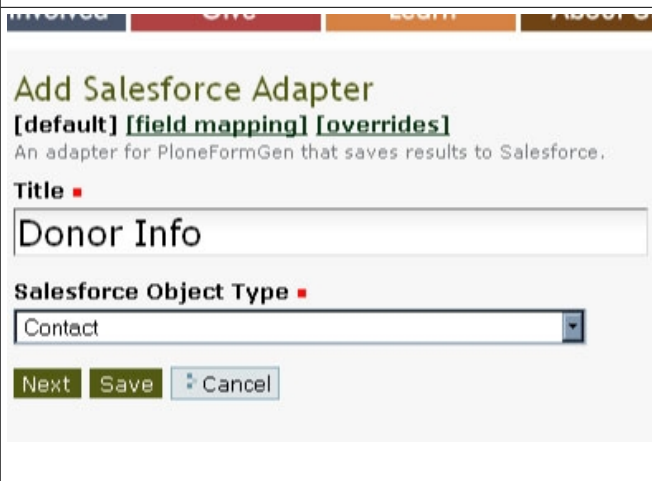


Make sure “form folder” is selected from the left navigation. I called mine “get paid”

13. Now go to “content”

Add new

Goto “Salesforce Adapter”



14. Enter a title – I called mine “Donor Info”

From the **drop down menu** I selected “Contact” -- but you would select the field set you would like to map.

Then hit “Next”

15. Use the individual drop down menus and select the corresponding field.

ex. left column reads
“contact Information →
first name”

Select the “first name” from the right hand side drop down menu.

**Click next to set TALES Expression
Or simply hit “save”**

16. Remove left portlets on the form folder page.

You may, and almost sure will, want to add more salesforce objects, there are a few items to be taken in account.

- After doing your editing of salesforce Adapters you should open the GetPaid adapter (Donate in this case) for edition and then save it, this ensures us that GetPaid adapter will add a condition to all other adapters to be executed after it.
- You have to make sure that all the required values are mapped, also the only hidden value you can create is a string field, so for boolean values you will need to set as a default value 1. For hidden date fields, which you can also create with string fields, you need to set, under the “Overrides” tab the “Default Expression” field with the value “python:DateTime().ISO()” (without the quotes), this will ensure that the default value for that field is today date in an understandable format
- If you are creating an Opportunity for instance you will need a “ContactName” string hidden field mapped to the Name field, that will be automatically filled with “FirstName LastName – Donation – Date” on checkout time.