

Little Green Light & Wufoo: HTML Forms integration

Our integration with Wufoo's HTML forms allows you to collect almost any kind of information from your constituents and have it synced automatically with LGL.

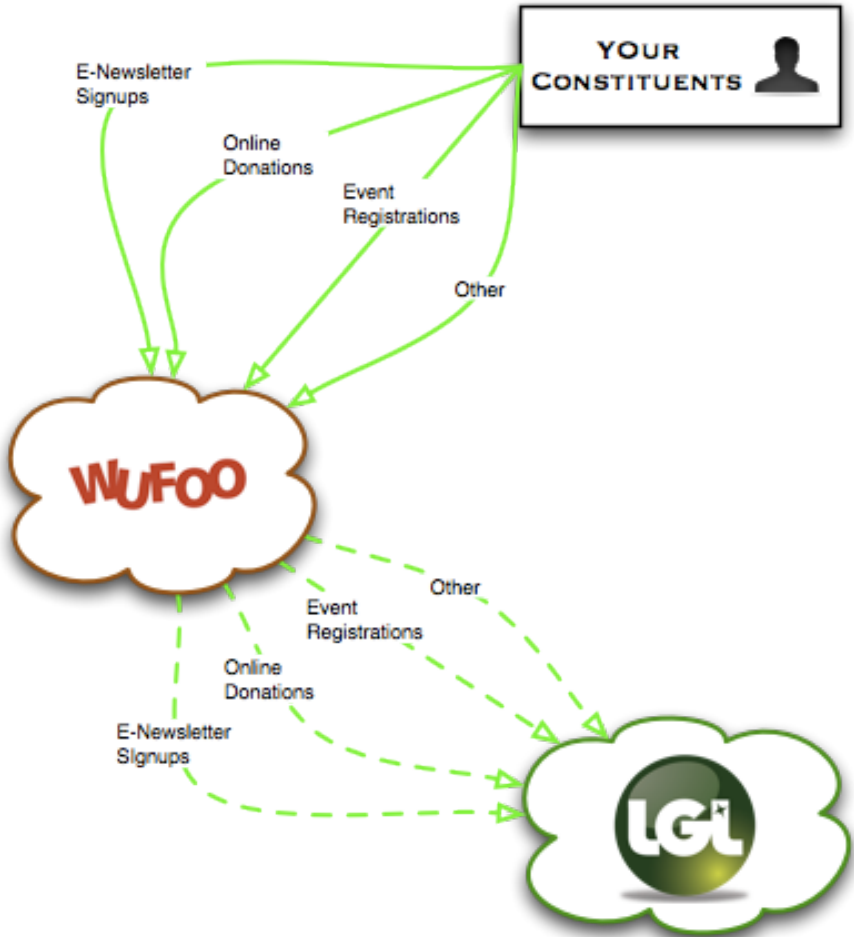


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I. Overview

Little Green Light's integration with Wufoo's HTML Forms, means that you can now collect information from your constituents online and have it automatically entered into your LGL database. Common examples include:

- ◆ **Donation forms:** collect donation details and payments from your constituents online. These donations can be set up to automatically create gifts entries in LGL.
- ◆ **Event forms:** collect RSVP, additional guest, and payment information for any event.
- ◆ **Volunteering forms:** Collect information about volunteer interests and/or participation.
- ◆ **e-Newsletter signup forms:** Particularly useful when working with our MailChimp integration (<http://assets.littlegreenlight.com/docs/LGLMailChimp.pdf>).

Wufoo strives to be the “easiest way to collect information over the internet” and their forms can be hosted by them or deployed somewhere else (for instance, on your website).

In this document we will walk you through the process of connecting LGL to your Wufoo account, and then show you how to configure the forms so that information will flow automatically into LGL.

Note: Wufoo is not affiliated with LGL in any way. The Wufoo service is completely separate and carries its own pricing structure, terms of service, and privacy policy.

Please see <http://www.wufoo.com> for details.

2. Connect Wufoo to LGL

a. Create your Wufoo account

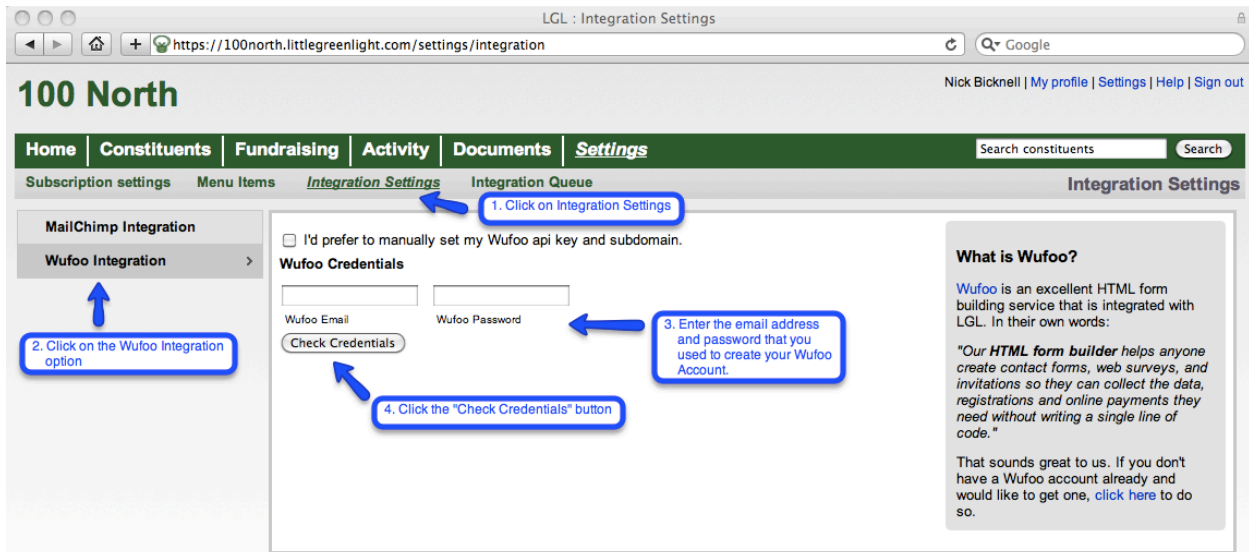
The first step is to get a Wufoo account if you don't already have one, which you can do here: <https://secure.wufoo.com/signup/>

b. Connect your Wufoo account to LGL

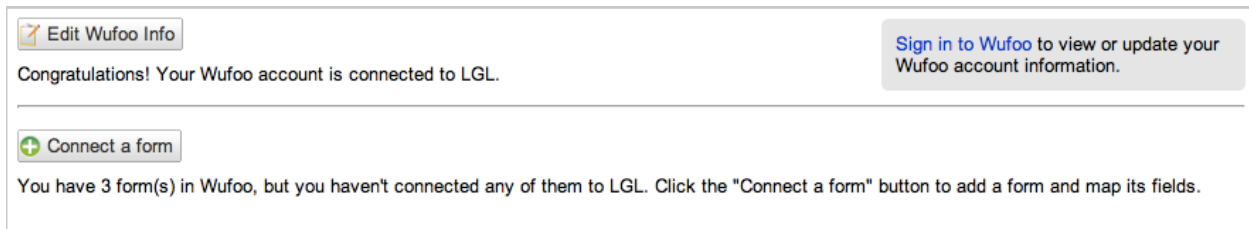
Note: You must be an administrator to use this feature in LGL. If you are not an admin, you will not see any of these features.

After logging in to your LGL account, follow these steps to connect your Wufoo and LGL accounts:

1. Go to *Settings* and click on the *Integration Settings* link
2. Click on the *Wufoo Integration* menu
3. Fill in the email address and password for your Wufoo account
4. Click the *Check Credentials* button to complete the connection.



If there is a problem with your username or password you will be notified with an error message, but if all goes well you will see something like this (assuming you have a form or three set up in Wufoo already).



If you don't have any forms in Wufoo already, you probably will want to create at least one. This is also extremely easy to do within Wufoo, and you can follow their instructions. The interface is pretty straightforward, but we also recommend looking at their [extensive help documentation](#) if you have any questions about how to do that.

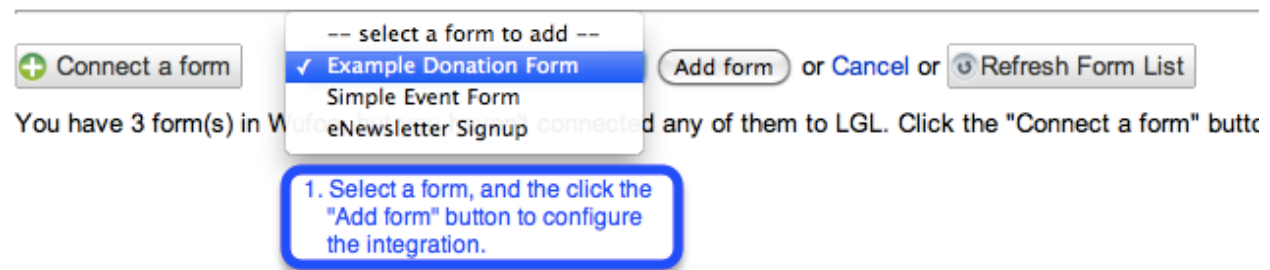
3. Map Wufoo Forms into LGL

To make the integration for any form complete, we need to tell LGL how to map the data from Wufoo's form into the appropriate places in LGL. For example, a simple donation form from Wufoo would probably contain information about the following three types of data in LGL, at a minimum.

- ◆ Constituent name information
- ◆ Constituent contact information (phone, email, address)
- ◆ Gift information (amount, received date, notes, etc.)

a. Connect a new form

To connect a new form, click on the *Connect a form* button, select the form you want to connect to LGL, and then press the *Add form* button:



b. Map the form fields

After choosing a form to integrate, you can select our record matching preferences for the form (how will constituent information from new submissions be matched to existing records in LGL?), and also define the field mapping rules so that the information for each submission will end up in the right place.

Record matching preferences

You can decide if LGL should try to match new records to constituents by email and name, or just name, or both. If neither option is selected, then LGL will create new constituents for each submission.

Map fields from source

All of the form fields from the selected Wufoo form will be listed in this section, and you can map them to the appropriate record type and field within LGL. Many of these mappings will happen automatically if you use the standard Wufoo field names, but if a field is not mapped (if the – *Do not import* – option is selected) then it will be left off.

2. Map fields from source

Include gift fields
 Map all entries to a specific event Refresh source fields

Wufoo Field Name	LGL Field
Name - Title	Field Prefix <input type="text"/> <input type="button" value="Add a rule"/>
Name - First	Field First name <input type="text"/> <input type="button" value="Add a rule"/>
Name - Last	Field Last name <input type="text"/> <input type="button" value="Add a rule"/>
Name - Suffix	Field Suffix <input type="text"/> <input type="button" value="Add a rule"/>
Email	Field Email address <input type="text"/> <input type="button" value="Add a rule"/>
....	
Campaign Name	Field Campaign Name <input type="text"/> <input type="button" value="Add a rule"/>
Fund Name	Field Fund Name <input type="text"/> <input type="button" value="Add a rule"/>
I am interested in hearing about: View choices	Field -- Do not import -- <input type="text"/>
Payment Total	Field Gift amount <input type="text"/> <input type="button" value="Add a rule"/>
Date Created	Field Gift date <input type="text"/> <input type="button" value="Add a rule"/>

or

Since this form is a “Donation” form, you would want to check the *Include gift fields* option, so that you can map the *Payment total* from Wufoo into the *Gift amount* field in LGL. We will cover more advanced topics around field mapping below, but now that you have the basics in place here, you can save the form and complete the integration process.

c. Set form preferences and activate the connection from Wufoo

Now that the field mapping for this form is saved, you’ll be returned to our Wufoo Integration page, where you should see the new form on your list of active forms:

Form Information	Entries (in Wufoo)	Submissions (to LGL)	Actions
Example Donation Form View form <hr/> Connection: <input type="checkbox"/> Enabled Require review? <input checked="" type="checkbox"/> Yes Queue: <input type="text" value="Constituent"/>	1 entry	1 record	<input type="button" value="Update field map"/> <input type="button" value="Refresh Count"/> <input type="button" value="Import all"/> <small>Last Sync Completed: 2011-08-02 at 01:28 AM</small>

From this listing you can toggle a few preferences:

- ◆ **Connection:** Checking this box will enable the automatic submission of new form entries from Wufoo into LGL. We recommend that you check this box for forms that should have automatic integration (in other words, most forms).
- ◆ **Review preferences:** Do you want to automatically save new records or add them to a queue for review? We recommend that you do set this to “Yes” initially to make sure that

submissions are happening appropriately. Later on you can update the settings to process the records automatically.

- ◆ **Review Queue:** There are four possible queues: Constituent, Gift, Event, and Volunteering. This allows you to review and approve all submissions of a given type more easily.

4. Reviewing and saving Wufoo form submissions

Now that you have a Wufoo form (or two) mapped to our LGL account, the fun part begins. If you had existing forms in Wufoo, it is quite likely that you have some entries logged there, which are not yet in LGL. If so, the first step is to import them all.

a. Import all existing entries

You can pull all submissions from a given form into LGL all at once by clicking on the *Import all* button in the *Actions* column. This will go out and grab all of the entries in the specified Wufoo form, and pull them into LGL, into the LGL for review.



b. The integration queue

The import process will kick off within a minute or two and then start adding all the entries into your *Integration queue*. If you have the *Require review?* checkbox checked, they will not be saved into your main LGL database. You can access your integration queue by clicking on the *Integration queue* link in the *Settings* sub-navigation:



You can also go straight to the queue for a particular form by clicking on the *X records* link in the *Submissions (to LGL)* column:

Form Information	Entries (in Wufoo)	Submissions (to LGL)	Actions
Example Donation Form View form Connection: <input type="checkbox"/> Enabled Require review? <input checked="" type="checkbox"/> Yes Queue: <input type="text" value="Constituent"/>	1 entry	1 record	Update field map Refresh Count Import all <small>Last Sync Completed: 2011-08-02 at 01:28 AM</small>

This will bring you into the integration queue with the entries for that form listed:

From here you can perform a number of different actions:

- ◆ Filter results by status, source, and queue
- ◆ Review individual records and save or reject them as appropriate. The information for each record is displayed so you can see what information will be added
- ◆ Save, reject, or reprocess whole sets of records (as defined by the filters selected)
- ◆ Assign constituents to records that did not find a match but should have
- ◆ Change the constituent if the assignment is not accurate

c. Saving records

As mentioned above, you can save records individually, or in a batch. In both cases, the records will be set to a pending state and then imported into your main LGL database. In many cases a form will describe multiple types of information, so a single record from Wufoo might create a constituent, related contact information, and one or more gifts. It is also quite typical for categories to be added.

In the case where a record is updating an existing constituent, none of the primary constituent information (names, etc.) will be updated. However, all additional kinds of data will be appended (contact information, categories, gifts, etc.)

To save an individual record, click the *Save* button in the *Record Status* column. To save a batch of records, select the appropriate option from the – *bulk updates* – menu:

In this case the bulk save would only affect 1 record, but if you have 50 records queued for review and want to save them all, then this is a big time-saver.

d. Rejecting records



Sometimes you will get submissions from your forms that you don't want to save. For example, if the submission is not valid or if it contains bogus information (like when you are testing), you

probably don't want to save it all the way into LGL. So, in those cases you can *Reject* the records. This can also be done individually or in bulk.

e. Editing the constituent assignment for records

All form submissions must be connected to a constituent in one way or another. If a match is not found, then a new constituent record will be created. In the event that LGL does not match the constituent, but it already exists (and you know this) you can override the constituent assignment.

If no constituent was found, you will see a record like this:

Submitted Date	Record Status	Summary
2011-08-02 at 02:13 AM	New <input type="button" value="Reject"/> <input type="button" value="Save"/>	Record #1 LGL Constituent None defined   Prefix Mr First name Jed Last name Bicknell Emails jed@bicknell.info [Home] Addresses 123 Main St. Seattle, WA 98115 [Home] Phones 2222222222 [Home] Gifts Amount: \$0.00 Campaign: Annual Giving Fund: General Fund

To set the constituent, you can click on the *Edit* icon (the clipboard) and then search for a constituent within the LGL database. Once this is done, you can save the record and the selected constituent will be updated.

5. Common examples of Wufoo form integrations

In this section, we'll review how to set up Wufoo forms to handle donations and events.

a. Processing donations

Pre-requisites

Certain Wufoo plans include the ability to integration payment processing into your forms, which means you can then accept donations, and have those automatically flow through as "Gifts" into your LGL account. These plans start at [\\$29.95 per month](#) and they currently support the following payment processors:

- ◆ PayPal
- ◆ Google Checkout
- ◆ Authorize.net
- ◆ USA ePay

To set up donation processing within Wufoo, you will need to have an account with one of those providers.

Step 1: Build your donation form in Wufoo

Once you have the above taken care of you can build a form in Wufoo that accepts donations. A simple version might look something like this:

Example Donation Form

Please enter your donation information

Name *

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title	First	Last	Suffix

Total **\$0.00**

Email

Phone Number

<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>
###		###		####

Address

Street Address

Address Line 2

City

State / Province / Region

Postal / Zip Code

Country

Donation information

Amount

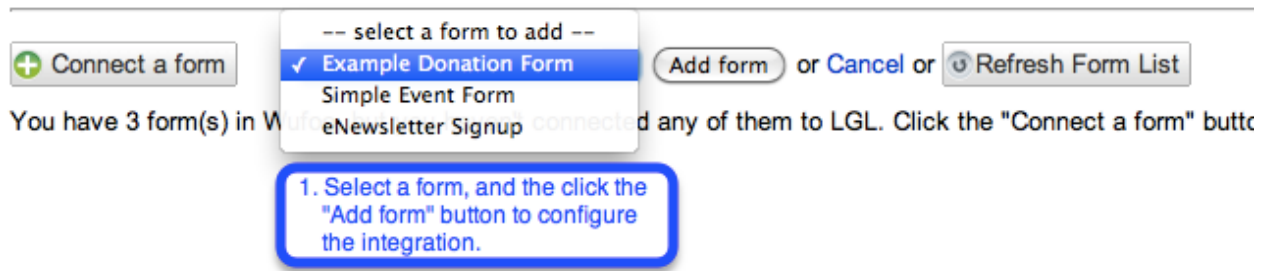
\$	<input type="text"/>	.	<input type="text"/>
	Dollars		Cents

Notes/Special Instructions

It contains basic contact information, as well as a place to add the donation amount and some notes to go along with the gift.

Step 2: Connect the form to your LGL account

With that form set up in Wufoo, the next step is to connect it to your LGL account. Following along with the instructions in section 3 above, you can do this by going to the *Wufoo Integration* section within the *Integration Settings* area of your account settings, and adding the form:



As soon as you add the form you can start mapping the fields (as described above).

Note: You will want to be sure to do one thing before we get too far along, which is to make sure you set the form up to *Include gift fields*. This will ensure that the *Payment total* and *Payment status* fields from Wufoo get carried over with each form submission:



Some of this is covered in section 6 below, but a few things to consider when setting up the integration with donation forms are:

- ◆ Which campaign, appeal, and/or fund should these donations map to? You can set defaults that will handle that mapping. In the case of funds, you might want to let the constituent choose from a menu of options there, and then set up the field mapping to assign the choices to the appropriate fund.
- ◆ What is the default payment type you want to assign? Something like “Online” or “Credit Card” probably makes sense.
- ◆ What category do you want to assign to these gifts, if any? This is another kind of default you might want to set.

Step 3: Watch the donations roll in

Well, we hope so anyway! As form submissions come through they will automatically land in your *Integration queue*, from which point you can save them individually, or set them to be processed automatically. New gift records will be created for each “paid” donation, and LGL will poll Wufoo for changes in status to any “unpaid” records.

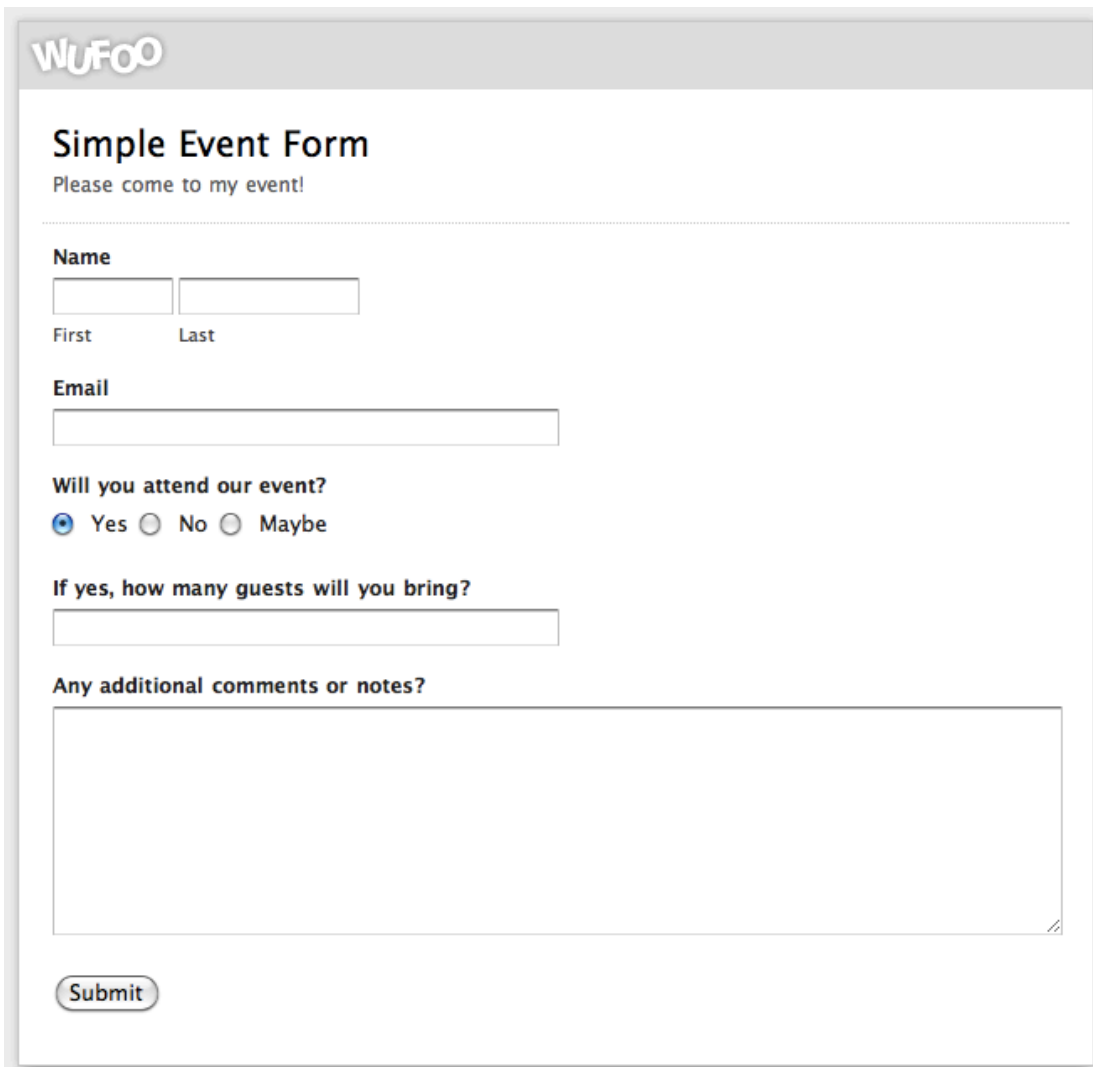
Note: LGL will not save any record with donation information that is not in a *Paid* state.

b. Handling events

With or without payment options included, you can connect all form submissions to a particular event. Doing so allows you to collect RSVP information and to take advantage of any custom fields or categories you have defined for that event in LGL, which in turn will cut down on data entry in a major way. With payment information included you could even handle ticket sales in a fairly basic way.

Step 1: Create your event form in Wufoo

As before, the first step in the process is to create the form for your event in Wufoo. Here's a basic example:



The image shows a screenshot of a Wufoo event form titled "Simple Event Form". The form includes the following fields and options:

- Name:** Two input fields labeled "First" and "Last".
- Email:** A single input field.
- Will you attend our event?:** Three radio button options: "Yes" (selected), "No", and "Maybe".
- If yes, how many guests will you bring?:** A single input field.
- Any additional comments or notes?:** A large text area for comments.
- Submit:** A button at the bottom left.

Step 2: Create the corresponding event in LGL

If you want all submissions to go toward a particular event, you need to make sure that event exists in LGL. We recommend that you do this before you connect the form and start the field mapping process. It's also a good idea to add any custom fields or categories you'll need (usually this depends a bit on the fields in the form). Using the above form as a basis, you would want to create an event called "Simple Event" and then add a custom field to track the number of additional guests for each record.

Here's a quick summary of how you can do that:

1. Navigate to your *Fundraising / Events* page and create a new event:

Events | **Fundraising** | Activity | Documents | Settings | Search constituents

Campaigns | Funds | Appeals | **Events** | Gift Batches | Acknowledgments | Exports

New event

Campaign
-- unassigned --

Name
Simple Event

Date 2011-08-31 **End Date** **Is active?**

Target/Gol \$ **Projection** \$

Save or Cancel

2. After saving the event, click on the *Customize Event* button

Search constituents Search

Event Details ?

Customize Event Edit Delete

3. From there, click on the *Invitation Attributes* menu, and then click the *Add attribute* button to add a custom attribute:

Add attribute x

New Attribute

Name
Additional Attendees

Attribute Type
Number

Show for Individuals **Show for Organizations**

Record Type
Invitation

Read only?

Save or Cancel

Note: you can also add custom categories for an event from this same area, which is a great way to capture menu-driven information from a form. Examples might include sponsorship levels or types that are specific to a given event.

Step 3: Connect the Wufoo form to the LGL event

With your event all set up in LGL, you can now return to the *Integration Settings* page to connect the form.

1. First, you will want to connect the form, as described in Section 3 above:

Connect a form | -- select a form to add -- | Add form or Cancel or Refresh Form List

Form Information | Simple Event Form | eNewsletter Signup | Entries (in Wufoo) | Submissions (to LGL)

2. Next, you want to make sure that this form will be connected to your event within LGL. You can do this by checking the *Map all entries to a specific event* checkbox, and picking the appropriate event (in this case, the *Simple Event*):

2. Map fields from source

Include gift fields

Map all entries to a specific event

-- select an event --

Simple Event

Import all records to a specific event, and utilize event-specific custom fields

3. Now, you can start mapping the fields. You will notice that many fields are mapped automatically, since LGL can recognize the names, but others will need to be mapped manually. Here is what the mapping might look like when you are done:

Wufoo Field Name	LGL Field
Name - First	Field: First name
Name - Last	Field: Last name
Email	Field: Email address
Will you attend our event? View choices	Field: RSVP Status
Rule: Map values	
Wufoo Choices	LGL Choices
Map: Yes	to Yes
Map: No	to No
Map: Maybe	to Maybe
If yes, how many guests will you bring?	Field: Additional Attendees
Any additional comments or notes?	Field: Notes
Date Created	Field: -- Do not import --

The default RSVP status fields can be mapped to the form choices by adding a rule.

The custom field we defined for Additional Attendees is used here

4. With that done, you can save the field mapping and proceed to connecting up the form:

Simple Event Form View form	0 entries	0 records	Update field map
Connection: <input checked="" type="checkbox"/> Enabled			Refresh Count
Require review? <input checked="" type="checkbox"/> Yes			
Queue: Constituent			

With that done, you are all set to begin accepting event registrations for your *Simple Event*...

6. Advanced form/field mapping techniques

In this section we will cover several useful but advanced techniques for mapping data from Wufoo forms into LGL.

a. Applying rules to any field mapping

When mapping fields from Wufoo, rules can be applied to any field mapping. There are three types of rules currently, which can be used to:

- ◆ **Set defaults:** Any field can have default values connected to it. In some cases, these values will be directly related to the field in question (setting the Phone Type appropriately for a “Cell phone” number, for instance), but in other cases they will only be tangentially related (for instance if you want all constituents submitting a form to be added to a particular group in LGL).
- ◆ **Prepend text:** Most text fields will allow you to prepend values. A common use for this is if you want to combine multiple fields into one text field in LGL, and then have a way to identify each value with it’s original source.
- ◆ **Map values:** Mapping values is useful for connecting up various menu selections from your forms to particular menus within LGL. For example, you can map RSVP statuses from your form to the appropriate LGL RSVP status. This rule is available for any field in LGL that has multiple controlled values (like Categories, Funds, Campaigns, Gift Categories, Payment Types, etc.)

To set up a rule for a given mapping, you can click the *Add rule* button next to the LGL Field, and then pick the appropriate value:

Email	Field	+ Add a rule	✓ --select rule --
	Field	+ Add a rule	Set defaults

b. Setting default values

As mentioned above, it is often useful to set default values. In the case of an email address, maybe you want it to always get assigned a “Home” type, and then also have it be marked as the “Preferred” email address:

Email

Field
Email address

Rule: Set defaults

Email Type Set to Home Remove rule

Preferred? Set to Yes

You can do this by adding two default values to the email address field, and a similar approach can be used for phone numbers and email addresses.

In other cases, you might want to make sure that every constituent gets a particular Group, Tag, or other category assigned. To do this, pick a field you know will always be present (for example, *First name*, and then add a few defaults):

Wufoo Field Name	LGL Field
Name - First	Field First name
Rule: Set defaults	
Groups	Set to Friend <input type="checkbox"/> Remove rule
Contact type	Set to Primary <input type="checkbox"/>
<input type="button" value="+ Add another default"/>	

c. Connecting multi-valued Wufoo fields to multi-valued LGL fields

It is quite common for Wufoo forms to have multiple values, either as drop down menus or multiple choice selections. These fields can be mapped cleanly to any LGL field that also supports menus (they can be mapped to any field, actually, but we recommend lining them up to known values in LGL if possible). For instance, you might collect information about a volunteer's interests through a form, and you could map each of those values to a corresponding value in a custom LGL category like "Volunteer Interest".

- I. The first step in this process is to make sure we have a Volunteer Interest category. You can set that up on the *Menu Items* page in LGL, and then add the appropriate values.

Add a category

New Category

Name
Volunteer Interest

Type
Multi select

Is a filter?

Save or Cancel

- Then, when mapping the fields from your volunteer signup form, you can connect the form choices to the LGL Volunteer Interest values by adding a *Map values* rule:

Yes, I would like to help out in the following ways: [View choices](#)

Events
Fundraising
Technical

Field: Volunteer Interest

+ Add a rule

- select rule --
- Map values
- Set defaults

- For good measure, you can also set a default so that these constituents will be added to the *Volunteer* group:

Yes, I would like to help out in the following ways: [View choices](#)

Field: Volunteer Interest

+ Add a rule

Rule: Map values

Wufoo Choices	LGL Choices
Map: Events	to Event Helper
Map: Fundraising	to Fundraising
Map: Technical	to Technical

Remove rule

Rule: Set defaults

Groups Set to Volunteer

Remove rule

+ Add another default

Now your form submissions will be nicely categorized in LGL.

7. Wrapping up

We've really just covered the basics when it comes to what you can do with Wufoo forms and LGL, but you should now have enough information to get up and running with some basic forms. If and when you run into questions, please send us an email or give us a call.

support@littlegreenlight.com

877.820.6109

We are here to help!