

Pre-filling the Donate form on the Telefundraising Page

To perform various types of calling, Telefundraisers will receive a CSV of leads (existing contacts we think may convert) exported by Salesforce. Each lead will be associated with a unique URL that will lead them straight to a GPAP-built donation webpage, which can be used to sign donors up directly.

Alternatively, fundraisers can supply their own leads (which may not be in Salesforce) and generate the links themselves.

The telefundraising donate form will parse the URL query parameters, and extract contact information from them. This information is used to pre-fill the form, greatly reducing friction for the telefundraisers.

The schema below describes the data expected in the URL. Although it is shown as an object here, it would be encoded as a **base64 JSON string**. This encoded contact data must be stored as the value of the query parameter **contact**.

For clarity, the schema is depicted as a [Flow Type Alias](#).

```
type AustralianState = 'NSW'|'NT'|'QLD'|'SA'|'TAS'|'VIC'|'WA';
type Contact = {
  firstName: string;
  lastName: string;
  email: string;
  phone: string;
  salesforceContactID?: string; *(Mandatory for internal leads; not
present for external leads)
  addressLine1: string;
  addressCity: string;
  addressPostcode: string;
  addressState: AustralianState;
  addressCountry: string;
}
```

Additionally, these fields should be included in the URL as standard query parameters. These are:

```
type amount?: string;
```

```
type interval: 'weekly' | 'monthly'  
type intervalCount: 4 | 1  
type campaignID: string;  
type commitmentID: string;
```

An example of this schema in JSON form is:

```
{
  "firstName": "Joe",
  "lastName": "Greenpeace",
  "email": "joe@greenpeace.org",
  "phone": "0412123123",
  "salesforceContactID": "contact_kfjadsfjhdslnkhjf1213",
  "addressLine1": "7 Mountain Street",
  "addressCity": "Sydney",
  "addressPostcode": "2000",
  "addressState": "NSW",
  "addressCountry": "Australia",
}

amount = 15.54
interval = weekly
intervalCount = 4
campaignID = campaign_lfjkdhasfahjs
```

A URL based on the example above:

<https://donate.greenpeace.org.au/telemarketing?interval=weekly&intervalCount=4&campaignID=abc11002&contact=eyJmaXJzdE5hbWUiOiJKb2UiLCJsYXN0TmFtZSI6IkdyZWVucGVhY2UiLCJlbWFpbCI6ImpvZUBncmVlbnBlyWNlLm9yZyIsInBoIjoiMDOxMjEyMzEyMyIsImFtb3VudCI6IjE1LjU0IiwiaW50ZXJ2YWwiOiJ3ZWVrbHkiLCJpbmRlc2ZhbmENvdW50IjoibG9ja3R5bWwifQ==>

Basic algorithm in Javascript to generate the URL above:

```
var interval = "weekly"
var intervalCount = "4"
var campaignID = "abc11002"
var URL = "https://donate.greenpeace.org.au/telemarketing-leads?" +
    "interval=" + interval +
    "&intervalCount=" + intervalCount +
    "&campaignID=" + campaignID +
    "&contact=" + btoa(JSON.stringify(contact))
```

Example Spreadsheet

A spreadsheet-based example showing the URLs being generated can be found [here](#). (Users outside Greenpeace - without edit access - may need to make a copy to have access to the custom app-script functionality which generates the URL.)

Changelog

1 May 2019:

- "amount" is not a required URL parameter. If not present, the telemarketing form will show a blank value for the amount input. If present in the URL, the form will be prefilled with the specified amount. Null values are not accepted: "amount=null" should never show up in the URL.
- Clarified that interval and intervalCount should be specific strings (e.g. "weekly" and "4"), not any string generally.

11 Oct 2019:

- contact > salesforceContactID will not be required for incoming leads from the Telemarketing agencies, when specified by [a config parameter](#) for the power variant of the donate widget.
- commitmentID can be provided in the URL, to allow associating a charge with a commitment (for arrears payments). [[Frontend PR](#)]

16 Jan 2020:

- ~~changed interval from 'weekly' | 'monthly' to 'weekly' | 'monthly' | 'annually' after Roisin reported that the donate form doesn't work to reactivate yearly folks.~~ We do not yet support setting up annual gifts in either the donate frontend or payments backend. [Related discussion](#).

Suggestion:

Make interval & intervalCount optional, and provide 'frequency'. If none of these are provided, we will default to a one-off gift. If frequency='once', 'interval' & 'intervalCount' must not be provided. If 'interval' is provided, 'frequency' should be provided.

```
type interval?: string
type intervalCount?: string
type frequency?: 'once' | 'recurring'
```

Update: we'll set interval=once for one-off. Will decide if/what to default to later.