Sevant Group

NonProfit Integration Quick Start

Congratulations on choosing the world's premier CRM, trusted by Fortune 500 companies for its usability, security, automation, and insights. The next step is getting your systems talking to each other.

Sevant's NonProfit Integration Quick Start program is designed to do exactly that. Our certified specialist will empower you to leverage your investment in Salesforce in just three weeks or less with this pre-packaged offering that includes training and a solid foundation for your organization.

Once you are set up, Sevant's team can help you execute your longer-term roadmap to better engage with your donors and clients.

How Non-Profit Integration Quick Start Works



Project Kick-Off | Object Configuration | Integration & Flow | Reports and Dashboards | Training & Go Live

The Details

Price

$5,000 One-Time fee (up to 24 hours delivered by your expert)

People

- **Sevant:** Certified Salesforce Specialist(s)
- **Customer:** Key Stakeholder/ Decision Makers. Subject Matter Experts (the person that knows your business the best), Salesforce Admin (the main person who will manage and maintain your Salesforce environment), Project Manager

Prerequisites

- Customer to provide courtesy/temporary login access and authentication support
- Customer will provide business overview and configuration requirement overview
- Customer will allocate 8-10 hours of meeting time with Sevant resources
- Up-to-date third party systems and API documentation
- Customer to provide an internal project manager with access to Sevant Project Portal

The Deliverables

In Scope

- Configured NPSP Cloud Environment
  - Up to 2 Custom Objects with up to 20 fields
- Authentication to third party app
  - Includes custom setting for managing one sandbox and one production connection
- Up to three (3) synchronization calls for Donors, Donations, Grants, Cases, etc.
  - Single direction sync
- Error Logging object to track issues with sync
- Custom Setting
- Create standard 3-5 Reports & 1-2 Dashboards
- 1 two-hour Train-the-Trainer session

Optional Add-Ons

- Deep Dive Business Process Review
- Additional synchronization calls
- Data Migration & Data Deduplication
- Advanced Process Automation - Approvals, Integrations, Flows
- Advanced Features i.e. Volunteer, Donor, Grant, Program, and Case Management
- Custom Code (e.g. Apex Triggers, Apex Code, ScreenFlow, Lightning Web Design)
- End-User NPSP and Inbox Training
- Lightning Sync, Einstein Activity Capture, Prediction Builder