

DALTON CRM

NONPROFIT CLOUD



PARTNER



Nonprofit Cloud Quick Start

Quick Starts help speed the implementation and adoption of Salesforce Cloud Technology. In many cases they provide a first introduction to a new way of servicing your customers, whilst delivering improved efficiency and productivity for Sales and Service.

The Quick Start focusses primarily on leveraging Salesforces Declarative (Low-Code) functionality to achieve improved performance. This powerful functionality can satisfy most business needs. Whilst some task areas are outside the scope of a Quick Start the process can identify which task areas may need a full coding approach (see below) and price these accordingly within the same reasonable pricing model used for Quick Starts.

Tasks - Functional Areas	Quick Start	Quick Start Plus
Discovery/Business Process Review		
15-20 Hours to Map all Processes	✓	✓
Preparation of Requirements Document	✓	✓
Sign-off on Requirements Document	✓	✓
Kick Off Session - Roles and Responsibilities		
2-3 Hours to define responsibility and timeline	✓	✓
Branding your application and login page	✓	✓
Registration of Salesforce custom domain name	✓	✓
Security and Access		
Configure all Users	Up to 20	30
Create Security Profiles to define access to objects	Up to 5	8
Set Access Levels	✓	✓
Define Log-in Rules	✓	✓
Passwords and Access Times	✓	✓
Household Accounts		
Set Up Accounts Record Page	✓	✓
Design Page Layout	2	3
Add Record Types	2	3
Creation of new custom fields	Up to 10	15

Customer Contacts

Set Up Contact Record Page	√	√
Design Page Layout	2	3
Add Record Types	2	3
Creation of new custom fields	Up to 10	15
Set Custom Contacts Lists	5	10
Engagement Plan Templates		

Opportunities - Donations

Set Up Opportunities Record Page	√	√
Design Page Layout	2	3
Add Record Types	2	3
Creation of new custom fields	Up to 10	15

Leads- Potential Donors(if required)

Set Up Leads Record Page	√	√
Design Page Layout	2	3
Add Record Types	2	3
Creation of new custom fields	Up to 10	15
Set up a custom Leads Process	√	√
Web-to Lead Assignment Rules	3	5

Automations of Business Processes

Custom Workflows	10	15
Custom Approvals	1	2
Process Builder	3	5

Marketing (if required)

Configure Marketing Campaigns	2	4
Campaign Set up Training (online hours)	1	2
Custom Marketing Lists	√	√

Analytics - Reports and Dashboards

Custom Reports	10	15
Dashboards	2	4

Data Import

Import of records	up to 1000	2000
Number of Separate Objects (Accounts etc.)	4	6
Provide Template for Data Input	√	√
Data Cleaning / Preparation	Customer Action	Customer Action

Go Live / User Training – Max 10 people

User Acceptance Training(UAT) (Hours)	7	12
System Administration Training (Hours)	4	7
Follow Up Support (Days) - Email Support	10	15

Areas that are generally outside the scope of a Quick Start:-

- Integration with external system
- Specialist areas with the cloud functionality that require more time to implement.
Example may include:-
 - Salesforce Knowledge
 - Forecasting
 - Territories
 - Multicurrency
 - Social Sign-On
 - Developing HTML or CSS
- Design of templates beyond standard functionality
- Apex coding , Visualforce pages, Lightning Web components
- Data Migration: Data population, preparation and cleansing. However guidance and uploading is provided. Large data migration may incur additional costs.

Any of the above requirements can be discussed prior to project assignment and priced reasonably.

Dalton CRM

www.daltoncrm.com

Contact: Fran Dalton 083 152 6813 (local) 353 (0) 83 152 6813 (international)