

DALTON CRM

NON PROFIT CLOUD MANAGED SERVICES PACKAGE

Helping Non-Profits to increase their social impact by maximising the functionality of Salesforce.

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(international)





Non Profit Cloud Managed Services

Managed Services from Dalton CRM help speed the implementation and adoption of Salesforce Cloud Technology. In many cases it provides a first introduction to a new way of servicing your Service Users while delivering improved efficiency and productivity for Service Delivery thus increasing your impact.

Using the full functionality that Salesforce provides also facilitates better reporting and management information required by various Stakeholders.

Dalton CRM Managed Services focus primarily on leveraging Salesforces Declarative (Low-Code) functionality to achieve improved performance. This powerful functionality can satisfy most Non Profit needs. Whilst some task areas are outside the scope of Managed Services Basic Plan, the process can identify which task areas may need a full coding approach (see below) and price these accordingly.

Tasks -Functional Areas	Basic
Discovery/Business Process Review	
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	✓
Review or Install NPS pack	
Consider elements of NPS for use	✓
Security and Access Review	
Configuration of Users	Up to 20
Create Security Profiles to define access to objects	Up to 5
Set up 3 Level Role Hierarchy to access records	10
Access Levels	✓
Log-in Rules	✓
Passwords and Access Times	✓

Household Accounts

Set Up Accounts Record Page	✓
Design Page Layout	✓
Add Record Types	✓
Creation of new custom fields	✓

Customer Contacts

Set Up Contact Record Page	✓
Design Page Layout	✓
Add Record Types	✓
Creation of new custom fields	✓
Set Custom Contacts Lists	✓
Engagement Plan Templates	✓

Opportunities - Donations

Set Up Opportunities Record Page	✓
Design Page Layout	✓
Add Record Types	✓
Creation of new custom fields	✓

Leads- Potential Donors(if required)

Set Up Leads Record Page	✓
Design Page Layout	✓
Add Record Types	✓
Creation of new custom fields	✓
Set up a custom Leads Process	✓
Web-to Lead Assignment Rules	✓

Service Users/ Partners Contacts Case Handling

Email to Case Set Up	✓
Web to Case Set Up	✓
Set Up Case Queues	✓
Case Assignment Rules	✓
Record Types	✓
Page Layout	✓
Email Templates (HTML)	✓

Automations of Business Processes

Custom Workflows	✓
Custom Approvals	✓
Process Builder	✓

Marketing (if required)

Configure Marketing Campaigns	✓
Campaign Set up Training (online hours)	✓
Custom Marketing Lists	✓

Analytics -Reports and Dashboards

Custom Reports	✓
Dashboards	✓

Products (for up to 200 products)

Set up Price Books	✓
Set Up Products	✓
Create Quote Templates	✓

Data Import

Import of records	✓
Number of Separate Objects (Accounts etc...)	✓
Provide Template for Data Input	✓
Data Cleaning / Preparation	Customer Action

Go Live / User Training

User Acceptance Training(UAT) (Hours)	✓
System Administration Training (Hours)	✓

Areas that are generally outside the scope of managed services:-

- 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. 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.

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