



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.

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