



GET UP AND RUNNING ON THE SALESFORCE NONPROFIT SUCCESS PACK — JUST 5 STEPS IN 5 WEEKS

Want to take advantage of Salesforce.org's [Power of Us](#) Program, but haven't gotten around to it? We can help. Our five-week, five-step program makes it quick, easy, and affordable to get up and running:



1. Onboarding

We help you acquire 10 donated user licenses for the Nonprofit Success Pack (NPSP) through the Power of Us grant from Salesforce.org. We also ensure your most important fields are set up properly, and we configure a user profile that supports your team's processes.



2. Data Migration

We work with your team to import data into Salesforce objects, including Accounts, Contacts, Relationships, Affiliations, Addresses, Notes, Opportunities, Recurring Donations, Campaigns, Donation Contact Roles (soft credits), General Accounting Units (GAUs), and GAU Allocations.



3. Reports and Dashboards

The NPSP comes with more than 150 reports. In addition to introducing you to these reports, we create up to five custom reports based on your needs plus a dashboard for additional insight.



4. Training

Your team will be set up to succeed with a combination of custom trainings and Salesforce Trailhead online courses. We record custom training sessions and make them available to your team for future reference.



5. Go-Live

In a coordinated effort with your team, we do a final test of your system and confirm a launch date. We work right by your (virtual) side for the big day. Then, you're up and running!

ONE LOW
PRICE:
\$15,000

ADDITIONAL SERVICES AVAILABLE FOR A LOW HOURLY RATE

Integration with Third-Party Tools

Data Maintenance

Custom Development

Ongoing Support

Learn more: cathexispartners.com/salesforce

Contact Us Today

info@cathexispartners.com
www.cathexispartners.com

