

NON FOR PROFIT

Standard Onboarding
Package



Constituent
Management



Monthly Reports
and Analytics



Membership
Management

NFP CRM



Sponsor
Management

Powered by.
ZOHIO



Event
Planning



Donation
Management



Volunteer
Management

Powered by.
OscilloSOFT
with Vision & solutions

Agenda

- ❑ Account & Technical Setup
- ❑ Business Analysis for NFP
- ❑ Web Forms
- ❑ Data Migration
- ❑ Mail Merge Documents & Contract Sign
- ❑ Donations Management and Training & Handover
- ❑ Custom Support Plans

* NFP Custom App powered by Zoho Apps

Prior to Kick off

Account & Technical Setup

- Invite your teams
- Applications overview of your package
- Manage User Licences
- Set up your domain
- Identify Champion users of your team
- Project Onboarding in Projects
- Initiate online meetings periodically

WEEK

1

Business Analysis for NFP CRM

- Configure Constituent Management tool modules
- Set up IMAP for your emails
- Connect your Web to Lead form
- Configure Security roles and profiles
- Choose Dashboard & Reports templates
- Choose Email Templates
- Set up workflows and assignment rules
- Set up Views and Filters

WEEK 2

Web Forms

- Build your own Forms
- Choose templates and design forms
- Integrate your Form into the CRM
- Share the form to collect leads
- Set notifications internally
- Set up the view to analyse reports
- Import your Volunteers, Contacts, Donors, Members and Sponsors into CRM

WEEK 2

Data Migration

- Standard data migration (a CSV file format) from the current system into the CRM

WEEK 3

Mail Merge Documents and Contract Sign

- Train to work with tool to mail merge documents templates
- Integrate your mail merge document tool into CRM
- Share the form and collect leads
- Set notifications internally
- Integrate your Contract Sign into CRM and Mail Merge tool

WEEK 4

Subscriptions Management

- Configure automatic invoices and recurring payments
- Set up payment options using PayPal, stripe, DD
- Configure the analyze and visualize real time reports on subscriptions
- Integrate Donations Management into CRM

Training & Handover

- Up to 3 hours Standard training for Champion users

Oscillosoft Support Plans

- 5-10 users will get 1 HOUR FREE support per month via ticket
- 11-39 users will get 2 HOURS FREE support per month via ticket
- Over 40 users will get 3 HOURS FREE support per month via ticket

* There will be an excess rate if it is more than 1 hour as we will bill at the standard rate (with 20% discount i.e \$120 per/hour, minimum 1 hour)