



1. How is Cases entity used currently? The cases entity is used to track the progress of a client through the escalation process, post-counseling. The Case entity contains information about the client (Lead), as well as detailed private information about the client's mortgage and credit, as well as progress made towards a modification or other resolution.

2. How many users are using the system and for what purpose (their functions) The Center has around 30 active Users at this point in time. These users range from center staff to network partners or other partner organizations collaborating with the Center on specific projects. There are 39 specific User Profiles in the system. Center staff utilizes the system to track and assist clients, refer them to partner organizations, and monitor client progress throughout a variety of programs.

The Center expects the selected Consultant to primarily work with the Call Center, Escalations, and with communications.

3. Are there any integrations built with website or other external systems? There are integrations with multiple websites, depending on the project. The Call Center recently deployed the 8x8 Business VOIP Service, which integrates with the Lead entity, providing caller information directly to Salesforce and identifies existing clients.

This particular scope of work is not expected to directly overlap with any projects utilizing an external website – only the 8x8 system. The Center expects the selected consultant to provide ongoing technical assistance on a retainer basis, which may include consultant on a project that utilizes a website connection.

4. Are there any custom objects created for the Center, please list? Yes, quite a few. The Center expects the selected consultant to review the instance of Salesforce and become familiar with the Center's system before work begins.

5. Does the Center use Nonprofit Starter Pack? No.

6. How many duplicates exist approximately between leads and contacts? What do you attribute the duplicates to, user error or an external system? The selected consultant is expected to identify all duplicate contact, with assistance from Center staff if so required. Duplicates are attributed to user error.

7. Has any automation been built to assign Leads to Organizations (zip code or otherwise?) Yes, the main Organization filter for Lead assignment is zip code. We are wanting to change this a bit- make more parameters in the Org that affect the selection when assigning a Lead- for example primary language, services offered, etc.

8. How do leads come in – automatically through the website? Previously, leads come in through the call center and have been instantiated by Center personnel. However, the 8x8 system may no instantiate a new lead, in conjunction with a Center staff member. In addition, new Leads are now being created by a website operated by the Center, FloopHelpNY.org.

9. How many reports and dashboards need to be created/updated, please provide a list? As stated in the scope, “The consultant is expected to revise the customized reports based on current Center needs, and to create customized dashboards for Homeowner Services staff members.

10. We anticipate the scope changing based on the discovery, are you currently only looking for an estimate to conduct assessment and thereafter developing a scope? The Center expects responding firms to develop an estimate based on the Scope and the answers provided here. The selected firm will then have an opportunity to revise their scope based on a meeting with the Center’s Salesforce Working Group. The cost should include full completion of Tasks 1-4, and pricing for Tasks 5 and 6.

11. Please share you budget for the assessment or implementation for us to offer appropriate recommendations? See question 10. The Center expects responses to include a technical description of the work to be performed and estimates of hours and cost. The Center will then select a firm. The selected firm will work with the Center’s Salesforce Working Group to revise the response into a final Scope of Work and Cost Proposal.