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## **What services do you offer directly from Prodigm?**

- Consulting and business advice regarding how to use the software to solve your specific business challenges
- Assistance with initial configuration of the software to meet your need, to get you up-and-running quickly
- Project management and coordination

## **What will it cost?**

Prices for hosting and services are available here: [Prices](#)

Using open source software is a bit like winning a great car in a lottery. The vehicle is free but you need to pay for gas, maintenance, insurance, modifications and if you do not know how to drive, you have to hire a driver! However the big advantages come from using a hosted environment where for a few dollars a day you end up with access to a great system with very good functionality, security, ease-of-use and expandability. A small organization can get up-and-running for a few thousand dollars and then extend the functionality as budgets allow. For our CRM products, after the initial expense you will finally have your names and addresses, groups, documents and communications all in one place, accessible by your staff through the internet and very secure. You will be linked to simple forms on your web-site for new member self-registration or client/lead identification.

Unless you have in-house expertise or very technical volunteers, it makes sense to pay for initial configuration and data conversion, including the addition of data that is custom to your needs and previous data gathering. We offer training and there are also often training sessions organized and promoted by the user group for your product. On-line forums and help materials also help to increase the expertise in your organization at no or low cost. It generally makes sense to get up-and-running and explore the inherent capabilities of the standard product before asking for major extensions; there may be a simple work-around using standard capabilities.

Phase 1 would normally include:

- Setting up the CiviCRM system in its own web-site - can be your url or separate and linked by a "Members login" link
- Updating the DNS registration
- Basic configuration of the configuration checklist
- A few days of consulting/advice/hand holding
- First year's hosting cost for 3 admin users (if you hosted with us)
- Loading your data from the excel spreadsheets where it now resides including creating new custom data fields and groups
- Setting up your granular access control in Drupal to ensure the right people get access to the right data
- Access to all CiviCRM modules
- Basic introductory training and familiarization

- An outbound email address for bulk emailing

At the end of phase1 you will be able to access and maintain all of your membership and donors plus integrate on-line community members, add people to groups and create templates for emails. After phase 1 you will be able to explore the free resources offered by the user community, and the user-group and training sessions that are offered both in California and New York currently. Depending on the size of your organization and the complexity of your data, a budget of \$5-10 thousand is often enough.

### **Do I need business analysis?**

Business analysis will provide you an insight into how your business can best use the facilities that are offered in our hosted open-source software. We can define your critical business processes and describe how those will be supported. If custom data is required, it is defined. If there are custom logic requirements such as "When this happens (**change in data content** for example) do this (defined response such as **send a specific email** for example, or **recalculate field values**)".

Business analysis involves a highly experienced business analysts spending time evaluating your business needs. Depending on the complexity of the project this can take days, weeks or months. Costs can be as low as a few thousand dollars for a simple implementation, but could run to the tens of thousands of dollars for medium sized projects. Once business analysis is complete, including presentation to you and your team to ensure the finished project is correctly defined and addresses the key requirements, the programming and testing phase can be estimated. For larger projects we follow classic project management guidelines as defined by PMBOK.

### **Can the CiviCRM or Vtiger site also be our main website?**

It can be, or you can continue to run with your current web-site and link to Vtiger or CiviCRM for just the key functionality - Register a new user or member, sign up for an event, pay a membership fee etc. For the basic hosting we supply the open source standard version of Drupal CMS (Content management System) or Joomla CMS. This is adequate for running CiviCRM or Vtiger but you will probably need extended functionality to make the web-site maintenance and CMS easier to use and more fully functioned. Supported CMS systems can be installed for you for a small one time charge - see the hosting and set up [price list](#)

## Can I try it out?

Most of our software is available for a try out to get a "hands on" experience of the software. Note that this experience is just the basics, but you will be able to add and amend data and get an idea of the power and flexibility offered. Simply select the product and go to the product page for a link to the demo version.

The look of the software is very much dictated by which "Theme" is selected. You can experience this ability by selecting Products>CiviCRM then [Click here to review CiviCRM](#). You will notice that on the left panel there is a box called "Theme". You can change the theme using the drop down selection then click **switch** to experience some of the other themes installed. Other themes are available free or to purchase - simply Google search on "Drupal themes" or "Joomla themes"

If you want a more in depth demonstration, please email us by clicking [here](#) , we will be pleased to work through the software with you as a guided tour.

## Can I convert my data?

Data loading existing data into a new product can be a tricky technical job. The reason is that your data may not be organized appropriately or in the right format. We may need to create new data fields on existing tables or create new tables to accommodate your special data needs. Your existing data needs to be fitted into the appropriate fields in the new system to create the results you want. Even something as simple as Name and Address files may contain unexpected variations.

If you do not have expertise in this area, we suggest you leave it to us to convert your data. Send us what you have and we will provide you with an analysis of what it will take to load it for you. If your data is time-sensitive, we will have to test the conversion then pick a date to convert your data in its live state. We have for example had to convert a Billion dollar portfolio of mutual fund holdings in two days! Normally data conversion will be a matter of days, depending on the complexity of the requirements.

## What is cloud computing?

Cloud computing is the strongest modern trend in computer application usage and hosting. It means that your data and the applications that update your data, are all stored in a secure location, a dedicated or shared server, on the web. You do not have to worry about hardware

infrastructure investment except for the simple common, ubiquitous devices you use to access the internet everyday. That frees you up to concentrate your energy and capital on the core competencies of your organization. Banks have led the way in using secure cloud computing to store critical data about your accounts.

### **Who do I call for support when I get an error message using the system?**

- The answer depends on the [support option](#) that you chose to purchase when the system was installed.
- Most error messages are self-explanatory and reflect a problem with set up or settings. It is best to investigate these yourself: First check the set up items and secondly see if the problem is replicable.
- Secondly if you are still stuck, the on-line help and user forums provide a helpful and free service to share advice and insight. We provide you with a link to the help and forums from your links section in your software, and you can search for your specific situation and gather insight from all of the other users who are using the systems around the world.
- Thirdly, it is a very good idea to review the documentation that is available for searching specific issues
- If you cannot resolve the issue this way and you do not have an in-house expert resource, or contracted support consultant, hourly support can be accessed by calling (519) 497 3021 `begin_of_the_skype_highlighting` (519) 497 3021 `end_of_the_skype_highlighting`. You will be expected to pay in advance with a credit card for any support accessed this way.

### **What are my support options?**

- Self-support using in-house resources - suitable if you have immediate access to technical staff capable of resolving technical issues and user inquiries
- Third party support. We work with you during installation to establish your support needs and to establish the support resources and levels that works for you. If you want to upgrade your support option please call us to define your new needs. Typically this support is available either 9AM - 5PM, 5 days a week or can be 24/7.
- See [www.salmar.com/support.html](http://www.salmar.com/support.html) for more options for direct support

### **If we send bulk personalized Email, what is the daily limit?**

- You can email up to 5,000 emails per day with an HTML only email, no attachments.
- You can email 100 Emails per day with attachments up to 2MB
- For extended high-volume Email requirements, we suggest using a dedicated emailing service like [Constant Contact](#) We can optionally add the api to connect to Constant Contact to automatically mail the selected email addresses from CiviCRM. You just store the Email information in one place. Unsubscribes and opt outs are automatically added back to the

CiviCRM database.

## Why should I host with Prodigm/Salmar?

- Security - see [Security](#)
- Simple contract
- Great price
- CRM expertise \*
- Help with initial setup \*
- On-going reference and trouble-shooting \*
- Understanding your business \*
- Unlimited choice for you in finding support and developers if you want to extend the functionality of the standard software \*
- Open source software means you can always get an up-to-date copy of the software and we can optionally provide you with a complete data backup on demand, so moving to another server hosting service or an in-house server is always an option for you.
- Only pay for the support you need\*

\* Hourly or daily consulting fees apply to these services that require time from Outside services, Prodigm consulting or technical support staff