

FinDock Implementation Success Package (ISP)

Introduction

During the implementation, FinDock bundles its powers with FinDock's Strategic System Integrators to secure the entire project's success by including Expert Services in our offering for strategic customers.

Scope of responsibilities

Implementation delivery is the responsibility of the System Integrator. This Service will allow the Customer and the System Integrator to have a FinDock Expert available to their project team, to deliver the following support:

- Tailored 'in project' FinDock training for the Project Team Members and End Users
- Set up FinDock in Sandbox environments (we'll configure up to 5 Sandboxes and learn how to quickly configure additional Sandboxes)
- Assistance in scoping exercises
- Assistance in Payment related Sprints / User Journeys
- Advise on Guided Matching rules
- Providing Payment-related historical data loading best practices
- Support Performance tests
- Troubleshooting FinDock capabilities
- Liaising with the Support team
- Liaising with the Customer Success Management team
- Liaising with the FinDock Product Management team
- FinDock Project Management

Out-of-scope activities

The following activities are out-of-scope of the FinDock Implementation Success Package:

- Customising Salesforce standard and custom objects and fields
- Set up of Flows (including Workflow, Process Builder etc.)
- Creating customisations (Lightning Components, Apex, Visualforce etc.)
- Set up of reports and dashboards

- Set up of email templates
- Set up of Marketing Cloud integration
- Data Migration execution
- Set up Guided Matching Rules (we will advise on how to implement this feature and help set up your first rules)
- Set up Giving Pages (we will advise on how to implement this feature if required)
- All other Salesforce configurations, unless agreed otherwise in a FinDock Statement of Work and agreed with the System Integrator

Terms and conditions

- The FinDock Expert Services resource will act as the Single Point of Contact for the Customer and the System Integrator. He or she will liaise with other FinDock resources to be involved in sharing best practices.
- Every month, the Customer and System Integrator are entitled to consume consulting hours (Expert Services bundle) equal to the monthly contract value, determined by dividing the monthly contract value by the rate specified below.
- The monthly agreed Expert Services bundle expires at the end of every month, remaining days/hours can't be carried over to the next month
- Should the predetermined number of hours included in the monthly bundle be exceeded, the provision of additional Consulting Services may be accommodated, subject to the Consultant's availability. These additional services shall be billed at the Consultant's standard daily rate, which is detailed below in this document.
- Resources need to be requested at least 2 weeks upfront.
- The validity of the Implementation Success Package is defined in the order form and will automatically end at the time of Go Live. FinDock Go Live is the date of the first payment collected or reconciled via FinDock.

Rate card

Consultancy

GBP/EUR 1,800.- per day