

**Omatic Cloud**

Integration Processing Decisions

***Please review and answer these questions to the best of your ability. If you are unsure of an answer, your consultant will work with you during onboarding to answer your questions.***

1. Are you using NPSP? Yes ☐ No ☐
2. How long has your organization been using Salesforce?

☐ Less than year ☐1-3 years ☐3+ years

1. Do you have any managed packages that you like to import directly into? Yes [ ]  No [ ]
2. Is there anything unique about your database that we should know about before your onboarding begins? Yes ☐ No ☐

If so, what should we know? Examples include anything outside of Salesforce standard practices (individual accounts, accounts and contacts, etc.)

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1. Are there any required contact or account fields in your database other than email and last name? Yes [ ]  No [ ]
If so, what are they and what are the values?

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1. Concerning Addresses, which option sounds like your preferred way to import?

[ ] Overwrite the destination (SoR) address with the source (incoming) data; or

[ ] Compare the address that is incoming from the source against the data is in the SoR/destination

1. Are you importing transactions/opportunities? Yes [ ]  No [ ]
If so, what kind of transactions? Examples include Gifts, Registration fees, etc.

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1. Do you use different opportunity record types? Yes [ ]  No [ ]

If so, please provide the record type ID and record type name.

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