LRPS-2021-9167929 CORE System Localization Services in Indonesia, Malaysia and Philippines
Clarifications to Questions from Bidders
Part 2 - 9-Jul-2021

No	Reference	Question from Bidders	Clarification from UNICEF
1	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	- Could UNICEF please share list of Salesforce license and edition for current UNICEF's core system and rollout country? (List of license and edition can be easy for bidder to estimate functional base on license and limitation. If possible provide an estimation of Salesforce internal user and external partner.)	UNICEF will use both Saleforce Sales Cloud and Service Cloud licences for Fundraising and Supporter care functions. Partner community licences will be used for the usage of Community(Experience) cloud. UNICEF is using Salesforce Unlimited Edition. For Indonesia, Malaysia and Philippines, UNICEF can estimate 25 users each: 7 internal and 18 for Partner Community users.
2	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	- Does bidder need to propose Salesforce licensing?	No. This schema has already been established.
3	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	- Do all country users use a shared single platform/data or separated independently for each country? (In SFDC, it has environment calls "organization". Bidder would like to know whether all country can access system in one UNICEF organization or manage separated organization per country.)	For the Sales Cloud platform, UNICEF will have multiple regional Salesforce organization (Ex:- LACRO. EAPRO, etc) which will have the CORE managed package installed on them. Core package will provide common set of functionalities and multiple countries will share the single regional Salesforce instance. There is a single Marketing Cloud instance with separate Business Unit for each country connected to their appropriate Sales Cloud Regional Org instance.
4	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	From question 3, if separated platform for each country, - How UNICEF provide a core or managed package to vendor ? - Any guidance or knowledge transfer from package owner ? (From question 3, if each country has own SFDC organization, bidder assumes a roll-out must have a prebuilt core system from old vender and deploy as a baseline for new vendor to continue.)	As mentioned above, the approach is the Regional Org instances with multiple countries sharing the same org. CORE installation is done by UNICEF team with the expectation that localization will be performed by the local partner inline with UNICEF technical development and deployment guidelines.
5	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	From question 3, if shared single platform, - Any on-going customization made by previous vender overlap with project roll-out period ? - If yes, How UNICEF provide a control of version?	Refer to above answer. CI/CD procedures and tools are in place and guidelines will be shared and reviewed with the local partner after onboarding is completed.
6	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	As per Annex B: TOR - session 1, - Does legacy system DPO/DPV were replaced by new CRM? - Or still operation after launched of CRM?	That is correct. The new CRM will replace DPO which will be decommissioned.
7	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	As per Annex B: TOR - session 1, - Could UNICEF provide list of existing module in UNICEF core system or in SFDC managed package? (If possible, please share a related document or user manual.)	This will be provided to the selected/awarded partner.
8	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	As per Annex B: TOR - session 1, - How UNICEF's enterprise architect control the distribution of new release core upgrade?	Refer to above answer. CI/CD procedures and tools are in place and guidelines will be shared and reviewed with the local partner after onboarding is completed.
9	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	As per Annex B: TOR - session 2.d, - What system are a source of data for reporting and analytic? - Salesforce only or any others data source or warehouse? - If not only Saleforce then what is an expectation from vendor? - Why Power BI needs for analytic because SFDC already has report & analytic tool? - Any others source out of SFDC?	Not all historic data will be migrated to regional Salesforce instances. In addition to Salesforce, UNICEF will have Enterprise Dataware house in place where UNICEF will migrate all the data including the historic one. Any new data added to Salesforce will be synced back to Data warehouse via ETL jobs executing daily. So for reporting, UNICEF will use both Salesforce Reports and additional reports built on PowerBI with data warehouse as source of data. Keep in mind that SC Reporting only allows 2 level of joints in the reports and we have complex reports that require more advanced reporting solution and that is PowerBI.

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10	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	As per Annex B: TOR - session 2.e, - Does a scope cover any customization for main core functionality? - If yes, how to sent back to centralized managed package?	Any recommended functionality that is applicable to the main Core system will be managed by the UNICEF Core team, once the implementing partner provides the user story and it's properly approved for integration with Core system
11	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	As per Annex B: TOR - session 3.2, - Can bidder proposed project methodology for non-Agile? (Bidder will propose for waterfall (requirement & gap analysis / solution design / customization / testing / training and transition).)	Yes, bidder can propose methodology, which is part of the selection criteria in Annex D: Financial Response form.
12	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	As per Annex B - session 3.4, - Which system will be replaced by new core? - Which system still be alive after new core? Please list functional of alive system which has a connectivity with new core. (To estimate a middleware task.)	DPO will be fully replaced by the new system, with no other CRM remaining, with the exception of existing payment systems and certain donor care systems currently serviced by external partners - the latter will integrate via established API calls. Apart from systems highlighted above Middleware system and Data warehouse system will interact with the Salesforce CRM.
13	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	As per Annex B: TOR - session 3.5, - Does a core system / managed package freeze during the roll-out project implementation?	During Roll-out of local development, UNICEF will hold any upgrade to Core managed package. These (technical) details shall be clarified and further discussed with the selected contractor.
14	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	[Annex B - session 4.i] Any expected functionality of Service Cloud ? Does core - manage package include service ?	Correct. Service Cloud is a component of the package.
15	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	As per Annex B: TOR - session 4.ii, - Any expected functionality of Community Cloud? - Does core package include community?	Correct. External agencies will have a choice to connect to SFDC by using Community (Experience) Cloud or via API.
16	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	As per Annex B: TOR - session 4.iii, - Any expected functionality of any functional of Commerce Cloud? - Does core package include commerce?	Not at this point.
17	Annex B: Term of Reference (TOR) 2. Objectives, Purpose & Expected results 3. Description of assignments 4. Deliverables	As per Annex B: TOR - session 4.iii, - Does SoW cover an existing web front-end donation replacement?	This will be decided after completion of the discovery phase when localization requirements are fully captured and documented.
18	Annex B - Termm of Reference 3. Description of assignments 3.1 Business Analysis Services Providing functional, technical and SME support to the overall project team	- Is Business Analyst expected to play 3 roles of Functional, technical and SME support?	The BA will have the role (one role) to correlate releavant fucntional and technical concepts and provide direction and clarity to overall project team.
19	Annex B - Termm of Reference 3. Description of assignments 3.1 Business Analysis Services Providing functional, technical and SME support to the overall project team	- Is Functional support equivalent to SF Administrator? - or, SF Cloud Consultant? Or Any other role? Please confirm.	More inline with SF cloud consultant with strong skill set in capturing requrements, documenting discussions and options, and consolidating business and technical analysis and discussions

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20	Annex B - Termm of Reference 3. Description of assignments 3.1 Business Analysis Services Providing functional, technical and SME support to the overall project team	- Is Technical support equivalent to SF Developer? - or Any other role? Please confirm.	The BA does not need to be a developer, but should have technical understanding of Salesforce components, features and prefereably technical concepts.
21	Annex B - Termm of Reference 3. Description of assignments 3.3 Data Migration services	- Does UNICEF have preferred ETL tool? - Can bidder/partner suggest Open source ETL tool?	Azure data factory.
22	Annex B - Termm of Reference 3. Description of assignments 3.3 Data Migration services	- Will UNICEF provide the criteria's or rules for data extraction?	Correct.
23	Annex B - Termm of Reference 3. Description of assignments 3.3 Data Migration services	- Can data from the current systems be exported as CSV file in order to migrate data to Salesforce ? - How many systems are required data extraction?	A central SQL database and SQL tools will be provided to conduct data migration (ETL processes and cleansing) on the secure UNICEF environment. As long as data stays within secure environment suggested formats including CSV are acceptable.
24	Annex B - Termm of Reference 3. Description of assignments 3.4 Integration Service	- Does this scope includes development or configuration changes on Azure Integration services?	Correct.
25	Annex B - Termm of Reference 3. Description of assignments 3.4 Integration Service	- Which CI/CD tools are being used currently for Salesforce?	Cumulus CI with Azure Pipelines are currently being used. Git and Github as VCS. These (technical) details shall be clarified and further discussed with the selected contractor.
26	Annex B - Termm of Reference 3. Description of assignments 3.4 Integration Service	With respect to Integration from Salesforce , below are the systems needs to be integrated, Is bidder understanding correct? Please confirm. 1. Salesforce with Azure Integration services 2. Salesforce with Banking Interfaces and files 3. Salesforce with Payment Gateway 4. Salesforce with Third Party Systems 5. Salesforce with Marketing Cloud via MC connector	All the third party integrations to Salesforce will be via Azure Integration services except Marketing cloud and Data Warehouse Integrations.
27	Annex B - Termm of Reference 3. Description of assignments 3.4 Integration Service	- How many third party systems needs to be integrated with Salesforce?	That determination will be made at country level during discovery phase. All the third party integrations to Salesforce will be via Azure Integration services except Marketing cloud and Data Warehouse Integrations. So whatever system needs to connect will connect to Azure and only Azure will connect with Salesforce.
28	Annex B - Termm of Reference 3. Description of assignments 3.4 Integration Service	- How many integration touchpoints already in core system?	Thank you for your question which is well noted. These (technical) details shall be clarified and further discussed with the selected contractor.
29	Annex B - Termm of Reference 3. Description of assignments 3.4 Integration Service	- How many integration touchpoints are as part of localization to integrate it from salesforce?	Thank you for your question which is well noted. These (technical) details shall be clarified and further discussed with the selected contractor.
30	Annex B - Termm of Reference 3. Description of assignments 4. Deliverables Phase 2 - Implementation : iii. Implementation of online donation system that consists of front end CMS, payment gateway and salesforce	- Is Integration between online donation system (CMS) and salesforce are in scope?	Yes, and the integration shall be done via UNICEF provided APIs.

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31	Annex B - Termm of Reference 3. Description of assignments 4. Deliverables iv. Develop and integrate banking interfaces and files	- Is it UI integration with Banking interfaces or is it process/data integration? - Where are these files are stored currently? Is it in cloud or on premise?	It is anticipated that banking interfaces are process/data integrations. As long as data transfer is handled in a secure manner the approach can be decided at each country level.
32	Annex B - Termm of Reference 3. Description of assignments 4. Deliverables Phase 2 - Implementation : iii. Implementation of online donation system that consists of front end CMS, payment gateway and salesforce	- Which payment gateway is using?	Payment gateways varies by country and are subject to change.
33	Annex B - Termm of Reference 3. Description of assignments 4. Deliverables Phase 2 II. Implementation Partner community	- Does core solution have partner portals? - How many are in scope to implement?	- One Partner portal template will be provided as part of Core and that can be expanded as part of localization. - Only 1 partner portal in scope.
34	Annex B - Termm of Reference 3. Description of assignments 4. Deliverables Phase 2 - i. Implementation of Sales and Service cloud functionalities	- Does core solution has Service Cloud functionalities?	Correct.
35	Annex B - Termm of Reference 4. Deliverables 4.2 SES Platform Implementation	- How many integration touch points(Systems) are there?	Thank you for your question which is well noted. These (technical) details shall be clarified and further discussed with the selected contractor.
36	Annex B - Termm of Reference 4. Deliverables 4.2 SES Platform Implementation	Bidder presumes that salesforce integrate with other systems via Azure Integration services, is this understanding correct? Please confirm.	Yes, External systems will connect with Salesforce via Azure Integration services.
37	Annex B - Termm of Reference 7. Qualification requirements 7.4 Requirements Salesforce Development Services Einstein Analytics	- Is implementation/enhancements on Tableau CRM (Einstein Analytics) in scope? - Does core system have Tableau CRM?	No. This schema has already been established.

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38	Annex B - Termm of Reference 3. Description of assignments Data Migration	1. What are the various sources of data that need to be migrated to the new Salesforce system? How many source systems are there? 2. Architectural details of the data sources? Where are the source systems located (cloud, On-prem etc)? 3. Will the source data be provided in relational data format, or Is it in unstructured flat file format? 4. Are ER Diagrams for the source data available/can be shared at the time of execution? 5. Please provide list of all the entities and the volume of data in the entities that are to be migrated. 6. Is there any unused data sitting in the database? 7. Are there any unused fields sitting in the database? 8. Is there any data which is only used for reporting? 9. Does bidder need to migrate all of the data from the current application, or Will it be a cut down version, e.g., only for the last 3 years and so on? 10. Is there historical data to be migrated that will live on the target platform only for compliance reasons and not accessed regularly? i.e data to be archived? 11. Does bidder need to maintain legacy dates in the new system? (eg. Salesforce Audit Fields) 12. What is the current size of the source databases or files? What is the volume of data to be migrated? 13. What is the current growth rate of the database? Same information required at the entity level as well. 14. What is the acceptable down time of the current/source systems during data migration? 15. Does UNICEF have any data migration tool already available in the organisational technology stack that can be utilised for the exercise? 16. Is UNICEF facing any challenges with the current data quality? If yes, then what are those? 17. Will bidder has access to the source data/systems during the execution? 18. Is the data recorded across different time zones and how is that managed in the current system? 19. Are there any identified data transformations required as part of the migration such as using a combination of fields to derive a new dataset? 20. Will bidder has access to a Data Staging Environment during the Migration development? 21. What length of data history is required to be available in the operational system? At what point can large volume objects such as transactions be archived?	1) Only data from DPO to be migrated to Salesforce system. 2) Wil be answered after completion of discovery phase. 3) Wil be answered after completion of discovery phase. 4) Wil be answered after completion of discovery phase. 5) Wil be answered after completion of discovery phase. 6) Wil be answered after completion of discovery phase. 7) Wil be answered after completion of discovery phase. 8) Wil be answered after completion of discovery phase. 9) It will be cut down version to Salesforce and will be country to country as per their policies. Complete data will be migrated to Data warehouse. 10) Wil be answered after completion of discovery phase. 11) Yes. 12) Wil be answered after completion of discovery phase. 13) Wil be answered after completion of discovery phase. 14) Wil be answered after completion of discovery phase. 15) We have Azure Data Factory available for ETL purpose. 16) Wil be answered after completion of discovery phase. 17) Yes. 18) Data for one country will be in same Time Zone. 19) Wil be answered after completion of discovery phase. 20) Yes, Fullcopy Salesforce Sandbox will be provided for test run. 21) Wil be answered after completion of discovery phase.
39	Annex B - Termm of Reference 3. Description of assignments Data Integration	1. What is the number of external systems to be integrated? 2. Will the integration be inbound, outbound or both? Can bidder know the number and type of integrated systems in terms of inbound/outbound/both? 3. Where are the to-be integrated external systems hosted? Azure, On-prem, etc? 4. Will the integration be synch or asynch? 5. Any data cleansing or transformation required during the data flow through the integration interfaces? 6. Will the integration be batch or real-time? 7. Any approx. number of TPS (Transaction per second) to/from SF via the integration interfaces? 8. If the integration is batch, what is an acceptable syncing frequency? 5 min? 24 hrs? 9. Are the external systems able to be updated to allow for constraints on data entry to facilitate the data being integrated without issues? 10. Are any of the integrated systems intended to be combined into the new system in the future?	1) All the third party integrations to Salesforce will be via Azure Integration services except Marketing cloud and Data Warehouse Integrations. So whatever system needs to connect will connect to Azure and only Azure will connect with Salesforce. 2) It will be both. 3) Wil be answered after completion of discovery phase. 4) Depends on use cases. Most of the services are sync. 5) Possibly yes 6) Depends on use cases. Most of the services are sync. But support for bulk and async is also required. 7) Wil be answered after completion of discovery phase. 8) Wil be answered after completion of discovery phase. 9) Wil be answered after completion of discovery phase. 10) Wil be answered after completion of discovery phase.
40	Annex B - Termm of Reference 3. Description of assignments Saleforce	1. There is a mention of Sales, Service & MC. - Has the product capabilities already been mapped to business use cases? 2. Managed Package for Fundraising: Is it an in house-built app or an App exchange product being used? 3. How many users will be using this system per geo? 4. Will it be the same app across the region or specific to the country? 5. Is it the same sales/ support process being used across regions/countries? 6. Is Change Management a part of this program? 7. Who will be training the end users: SI Partners or Business or hybrid model? 8. Are there any existing integrations built into the Managed Package? 9. Will Fundraising be required across multiple currencies? 10. Is there a common financial institution used for processing the regular payments or does this vary by country? 11. Will there be an ongoing need to import prospects from externally sourced mailing lists? 12. Is the fundraising done through one off donations or through regular giving or both? 13. With regular giving will there be both Credit Card and Direct Debit bulk payments required? 14. Are regular payments processed on a set schedule or in daily batches?	1) Yes product capabilities has been mapped. 2) It will be private App exchange listing. 3) For Indonesia, Malaysia and Philippines, UNICEFcan estimate 25 users each: 7 internal and 18 for Partner Community users. 4) Core managed package and functionalities will be same across regions and on top of that localization will be added. 5) Core managed package and functionalities will be same across regions and on top of that localization will be added. 6) Yes. 7) Mostly business but Train the trainer sessions needs to be provided. 8) Not within core managed package. 9) Yes, multi currency support is considered in core package. 10) Vary by country. 11) If needed, will be using automations via API or file based. 12) Both. 13) Yes. 14) Vary from country to country. Functionality being used is built on top of Salesforce NPSP recurring donation payment processing.