



Consulting Offerings Review

Service Description

We offer five types of consulting. If you require assistance in choosing what type of consulting you need we will spend 30 minutes talking at a high level about your needs.

Remote Preparation

Your organization's prep work includes:

- Sign up to request consulting: <https://app.etapestry.com/hosted/ConsultingRequestForm/index.php>
- Finish training listed in Pre-Consulting Worksheet:
<https://app.etapestry.com/hosted/ConsultingRequestForm/Pre-Consulting Worksheet Not Sure.doc>
- Return completed Pre-Consulting Worksheet back to consulting@etapestry.com
- You will receive a scheduling link to sign up for time with a consultant

Delivery Process

You will work with a consultant through the following steps. Once these steps are complete we will consider the service delivered and close your project. If you determine you need additional assistance in this or any other area, you can request additional consulting services using the request form below:

<https://app.etapestry.com/hosted/ConsultingRequestForm/index.php>

We will spend 30 minutes on one phone call to help you determine what type of help you need. For specific details on the process, see the steps outlined below:

1. Introductory Call (Est. 30 minutes)
 - a. Discuss Accounting Integration
 - b. Discuss Queries/Reports
 - c. Discuss Mission Specific User Defined Fields
 - d. Discuss Standard Field Sets
 - e. Discuss Advanced Security