

1. Is Geneva Call using Dynamics 365 Business Central online (SaaS)? How are donor grant codes and donor funding applications (targets, probability, signed grants) currently stored: as standard dimensions, customers or jobs, or in a custom extension? Would a small Business Central extension (API page) be acceptable if needed for the synchronisation?

We are using Dynamics 365 BC online, the current grants are being stored as jobs. A BC extension could be acceptable as long as it guarantees the maximum security.

2. Microsoft licensing: which Microsoft 365 licences does Geneva Call currently use (e.g. Business Premium, E3, E5)? Does Geneva Call already have Power Platform/Dataverse environments or Power BI Pro licences, and is it registered for Microsoft's nonprofit offers? Should licence costs be included in the financial proposal, or will Geneva Call procure licences directly?

We have Business Premium for everybody. We have a Power Platform and 50 PowerBI Pro licenses. We are registered as nonprofit. Yes license costs should be included in the proposal but specifically separated from the implementation work.

3. Data residency: is hosting in the EU/EFTA region (EU Data Boundary, which includes Switzerland) acceptable, or does Geneva Call require data to be stored in Switzerland only?

We would prefer to have the data stored in Switzerland. Our tenant is currently located in Switzerland.

4. Data volumes: approximately how many contacts and organisations, and how many separate Outlook/Excel sources, are expected to be migrated?

We have roughly 30 Donors and maybe 500 contacts in outlook.

5. Communication tools: which tool(s) does Geneva Call use for newsletters and mass mailings, so that we can describe the export or integration?

MailChimp

6. Languages and training: in which language(s) should the user interface, training and documentation be delivered? Is on-site presence in Geneva expected for workshops or training?

In English, preferably on site, but online if not possible.

7. Support period: for how many years should support and maintenance be priced?
Does Geneva Call have a preferred currency (e.g. CHF) and pricing basis (fixed price or time and materials)?

We prefer to have a book of hour based on an estimated amount, rather than a support contract. The preferred currency is CHF

8. Submission: is submission by e-mail alone sufficient, without a hard copy? Are there file-format or size limits, and does "management CVs" refer to company management, the proposed project team, or both?

Email is sufficient.No specific format nor size limit.

9. The section on access restrictions refers to "the role-based access model defined under Section III M". Could you confirm which section this refers to?

Sorry about that, there is no Section 3 yet.

10. Whether Geneva Call has a preferred CRM platform family (Microsoft-native vs. vendor-neutral), or expects bidders to recommend one

We do not have a preferred platform, but as we are fully Microsoft based, it seems that the Microsoft CRM could be the most appropriate one. But we are open to discover other solutions.

11. whether Business Central exposes the donor/grant data through standard APIs/connectors already used elsewhere in the organisation.

No