EC

Evolving-Consulting

Reach your business & technology goals without any budgetary distress.

Sales Cloud Package

Quick and easy implementation, you will receive a tailored setup based on industry best practices, guidance from our experts, training session and support during Go-Live.

Scope Breakdown	Hrs	Cost in CAD
Project Management	4	$560.00
Lead Management Process	8	$1,120.00
Account & Contacts Management	3	$420.00
Opportunity Management Process	11	$1,540.00
Email/Calendar Sync	1	$140.00
Data Import	4	$560.00
Reports & Dashboards	4	$560.00
Training	2	$280.00
Go Live & Post Live Support	5	$700.00

Total Hours: 42
Total $5,880.00

What is included?

- ❑ **Project Management & updates**
- ❑ **1on1 Requirement Gathering sessions & walk-thru**
- ❑ **Lead Management Setup:**
  - ▪ Web-to-Lead form
  - ▪ Assignment Rules (Round robin or Criteria Based)
  - ▪ Object setup, Custom fields, record types, layouts and validation rules.
  - ▪ Up to 2 Lead Qualification process (Lead Status)
  - ▪ Lead field mapping (Lead conversion)
  - ▪ List views
- ❑ **Account & Contact Management Setup:**
  - ▪ Object setup, Custom fields, record types, layouts and validation rules.
  - ▪ List views
- ❑ **Opportunity Management Setup:**
  - ▪ Up to 2 Sales Processes (Opportunity Stages); includes the setup of Salesforce guidance for success for the Sales path.
  - ▪ Object setup, Custom fields, record types, layouts and validation rules.
  - ▪ List views
- ❑ **Opportunity Product Setup:**
  - ▪ Object setup, Custom fields, record types, layouts and validation rules.
- ❑ **Product Management Setup:**
  - ▪ Object setup, custom fields and layouts.
  - ▪ Up to 2 Price books.
- ❑ **Task Management Setup:**
  - ▪ Object setup, Custom fields, record types, layouts and validation rules.
  - ▪ List views
- ❑ **Reports and Dashboards:**
  - ▪ Evolving-Consulting out of the box reports
  - ▪ Evolving-Consulting out of the box Sales Dashboard
- ❑ **App Setup:**
  - ▪ Custom Sales app
  - ▪ Custom Home Page
- ❑ **Email Sync**
- ❑ **Standard Duplicate and Matching rules**
- ❑ **Security Setup (Profiles)**
- ❑ **Data Upload**
- ❑ **2hrs of custom training**
- ❑ **5hrs of post - Go Live support**

What's Next?

When you are ready to work with us, let us or your Salesforce Account Manager know. We will then send you the following documents:

- ❑ ***Service Agreement***
- ❑ ***An invoice for 50% of the estimate.***

Once we receive a signed service agreement and proof of payment we will schedule a Kick-off call to start our project.

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