

**DALTON CRM**

## SERVICE CLOUD

Quick Starts help speed the implementation and adoption of Salesforce Cloud Technology. In many cases they provide a first introduction to a new way of servicing your customers, whilst delivering improved efficiency and productivity for Sales and Service.

**Quick Start**



**PARTNER**



## Service Cloud Quick Start

Quick Starts help speed the implementation and adoption of Salesforce Cloud Technology. In many cases they provide a first introduction to a new way of servicing your customers, whilst delivering improved efficiency and productivity for Sales and Service.

The Quick Start focusses primarily on leveraging Salesforces Declarative (Low-Code) functionality to achieve improved performance. This powerful functionality can satisfy most business needs. Whilst some task areas are outside the scope of a Quick Start the process can identify which task areas may need a full coding approach (see below) and price these accordingly within the same reasonable pricing model used for Quick Starts.

Tasks - Functional Areas	Quick Start	Enhanced Start
<b>Discovery/Business Process Review</b>		
15-20 Hours to Map all Processes	✓	✓
Preparation of Requirements Document	✓	✓
Sign-off on Requirements Document	✓	✓
<b>Kick Off Session - Roles and Responsibilities</b>		
2-3 Hours to define responsibility and timeline	✓	✓
Configure Users / Adjust Profiles	✓	✓
<b>Accounts Customers</b>		
Service Console	✓	✓
Review Sales Cloud Set-up for any needed adjustments		
Additional fields to support case management	✓	✓
<b>Contacts</b>		
Review Sales Cloud Set-up for any needed adjustments	✓	✓
Additional fields to support case management	✓	✓
<b>Customer Contacts Case Handling</b>		
Email to Case Set-up	✓	✓
Web to Case Set-up	✓	✓

Set-up Case Queues	2	4
Case Assignment Rules	2	4
Record Types	2	4
Page Layout	2	4
Email Templates	4	8

#### Customer Service Commitments

Service Contracts	√	√
SLA Entitlements	1	2

#### Security and Access

Configure all Users	Up to 20	30
Create Security Profiles to define access to objects	Up to 5	8
Set Access Levels	√	√
Define Log-in Rules	√	√
Passwords and Access Times	√	√

#### Administrator and Monitoring

Activities (Tasks and Events )	√	√
Live Chat	√	√
Web to Case	√	√
Email Alerts	5	8
Escalation Rules	3	5

#### Automations

Custom Workflow Rule	5	4
Custom Approvals	2	4
Process Builder	3	5

#### Analytics -Reports and Dashboards

Custom Reports	10	15
Dashboards	2	4

#### Go Live / User Training – Max 10 people

User Acceptance Training( UAT) ( Hours)	7	12
System Administration Training (Hours)	4	7
Follow Up Support ( Days) - Email Support	10	15
On Site Training	Travel costs	Travel costs

Areas that are generally outside the scope of a Quick Start:-

- Integration with external system
- Specialist areas with the cloud functionality that require more time to implement.  
Example may include:-
  - Salesforce Knowledge
  - Forecasting

- Territories
- Multicurrency
- Social Sign-On,
- Developing HTML or CSS etc
- Design of templates beyond standard functionality
- Apex coding , Visualforce pages, Lightning Web components
- Data Migration: Data population, preparation and cleansing. However guidance and uploading is provided. Large data migration may incur additional costs.

Any of the above requirements can be discussed prior to project assignment and priced reasonably.

Dalton CRM

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