

DALTON CRM

EXPERIENCE 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





Experience Cloud Quick Start

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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.

This is a basic Quick Start to get a Community up and running, but does not include more than basic customization of the standard UI, and does not include the use of Community Templates or Visualforce. Dalton CRM has the capability of performing custom Communities implementations, but due to the unique nature of each one, we would need to discuss your needs before submitting a proposal.

Tasks - Functional Areas	Quick Start	Quick Start Plus
Discovery/Business Process Review		
Map all Processes Requirements	√	√
Identify the right template for a given use case	√	√
Preparation of Requirements Document	√	√
Sign-off on Requirements Document	√	√
Kick Off Session - Roles and Responsibilities		
2-3 Hours to define responsibility and timeline	√	√
Configure Users	Up to 15	25
Branding your application and login page	√	√
Registration of Salesforce custom domain name	√	√
Security and Access		
Select the correct external user license	√	√
Create and provision external users	√	√
Configure self-registration	√	√
Personalize the experience for different audiences.	√	√

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

Automations of Business Processes

Configure Workspaces	√	√
Custom Workflows (no external integration)	3	5
Set-up reputation levels and gamification	√	√
Web-to case	√	√
Web-to case Assignment Rules	√	√
Live Chat Agent	√	√

Analytics -Reports and Dashboards

Custom Reports	5	8
Dashboards	2	4
Measure adoption and engagement dashboard	√	√

Go Live / User Training - Max 10 persons

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:-

- Specific code and low code external interactions
- Integration with external system
- Specialist areas with the cloud functionality that require more time to implement. Examples 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.

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