SALESFORCE SALES CLOUD
QUICK-START PACKAGES

Synthesis

Standard

Planning & Kick-Off:
- Up to 2 remote business process review sessions where we review the business process and requirements needed to create a functional and technical blueprint for your business

Analysis & Design:
- Delivering a design document outlining the process in Salesforce and the configurations identified for approval
- Follow-up meeting to review the design document and make any final adjustments before development

Configuration:
Configuring Salesforce to meet your business requirements covers the following tasks:
- Customize included standard objects and fields of Sales Cloud including leads, accounts, contacts, opportunities, campaigns, quotes
- 1 price book and up to 30 products
- up to 2 custom objects
- up to 20 custom fields for each configured object
- page layouts for standard layouts and up to 2 custom objects
- up to 5 custom list views
- lead assignment rules with a max of 5 criteria
- forecasts
- up to 5 workflow or approval processes
- up to 10 validation rules
- 2 dashboards with a max of 10 metrics/graphs each
- up to 10 reports, which may or may not be included in the dashboards
- up to 2 user profiles

Training & Knowledge Transfer:
- 2 one-hour, remote "train the trainer" sessions for system knowledge transfer and end-user training

Advanced

Planning & Kick-Off:
- Up to 2 remote business process review sessions where we review the business process and requirements needed to create a functional and technical blueprint for your business

Analysis & Design:
- Delivering a design document outlining the process in Salesforce and the configurations identified for approval
- Follow-up meeting to review the design document and make any final adjustments before development

Configuration:
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- up to 10 reports, which may or may not be included in the dashboards
- up to 2 user profiles

Additional SF Configurations Include:
- Web 2 Lead form configuration with a max of 15 fields. We will provide the code but the client must install it on their website.
- Email 2 Lead configuration for 1 email
- Outlook sync or Lightning for Gmail connector configuration

Training & Knowledge Transfer:
- 2 one-hour, remote "train the trainer" sessions for system knowledge transfer and end-user training

Data Migration:
- Data import of work orders for a max of 500K records. Records must be provided in csv. No data de-duping or clean-up activities included

TALK TO OUR EXPERTS TODAY FOR MORE INFORMATION ON PRICING & DELIVERY MODELS.

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