

We implement the sales tracking processes included in Professional, Enterprise, Unlimited editions of Salesforce. This includes tracking of your Accounts/Companies, Contacts, Leads, Opportunities, Products, Price Books, Quotes, Forecasts, Lead Assignment Rules, Outlook Sync, Chatter, Campaigns, Page Layouts, Fields, Record Types, and Validation Rules.



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Planning & Kick-Off

- Up to two remote business process review sessions to review business process and requirements to create a functional and technical blueprint for your business.

Analysis & Design

- Delivery of 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

Configure Salesforce to meet your business requirements limited to the below declarative tasks

- Customize included standard objects and fields of Sales Cloud including Leads, Accounts, Contacts, Opportunities, Campaigns, Quotes.
- Configure Price-book and Product mapping
- Create Web to Lead functionality to get lead form web
- Creating custom objects sales.
- Customize page layouts for standard layouts.
- Configure custom list views.
- Configure Lead Assignment Rules with a max of 5 criteria.
- Configure up to 5 workflow or approval processes.
- Configure custom validation rules.
- Configure 2 Dashboards with a max of 10 metrics/graphs each.
- Configure Reports which may or may not be included in the Dashboards.
- Configure custom User Profiles.
- Creating Permission sets.
- Setting up Role Hierarchies for record sharing.
- Owner based and Criteria based sharing for record sharing.
- Automation using flows.

Training & Knowledge Transfer

- Two one hour remote "train the trainer" sessions to complete system Knowledge Transfer and end-user training

Standard Package
US \$ 48,000 – 72,000

No of Resources – 4

Project Duration – 4 to 6 weeks

Advanced Package
US \$ 48,000 – 72,000

No of Resources – 4

Project Duration – 6 to 8 weeks

Advanced Package Includes Everything in the Standard Package Plus:

Additional Salesforce Configurations

- Web 2 Lead Form configured with a max of 15 fields. We will provide the code and the client must install on their website.
- Email 2 Lead configuration for 1 email Data Migration

SIGMASOFT at a glance

Number of employees: **250+**

Number of customers: **100+**

Salesforce platform experience : **16+**

Number of completed projects: **100+**

Certified Digital Transformation consultants: **100+**

Location : **Santa Clara, Halifax, Dallas, Bangalore, Hyderabad**