QUICKSTART—SALESFORCE SALES CLOUD

Deluxe Package—$38,000
Timeline—8 weeks

Commerce CX
QUICKSTART

QuickStart packages allow you to begin using Salesforce soon and hit the ground running. From our experience with hundreds of Salesforce implementations, we've discovered the best practices to give you a fast return on your Salesforce investment and lay the groundwork for long-term success. These recommended configurations allow you to begin using Salesforce immediately upon project completion and provide a solid foundation for your future Salesforce goals.

Advantages of a QuickStart Package
- Begin using Salesforce in a matter of weeks
- Receive expert guidance for your Salesforce plans
- Includes clearly defined deliverables
- Flexible time and materials approach

Scope

Planning and Kickoff
- 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 and 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.

Data Migration
- Data Import of Work Orders for a max of 500k records. Records must be provided in CSV.

Training and Knowledge Transfer
- Two 1 hour remote "train the trainer" sessions to complete system KT and end-user training

Configuration
- Includes standard out of the box configuration of Sales Cloud objects and fields including Leads, Accounts, Contacts, Opportunities, Campaigns, Quotes.
- 1 Pricebook and up to 30 Products
- Up to 2 custom objects
- Up to 20 custom fields for each configured object
- Customize page layouts using standard layouts and up to 2 custom objects
- Up to 5 custom list views
- Lead Assignment Rules with up to 5 criteria
- Forecasts
- Up to 5 workflow or approval processes
- Up to 10 validation rules
- 2 Dashboards each with a max of 10 metrics/graphs

- Up to 10 Reports (May or may not be included in the Dashboards)
- Up to 2 User Profiles
- Web 2 Lead Form with up to 15 fields. (We will provide the code and the client must install on their website)
- Email 2 Lead for 1 email
- Outlook Sync or Lightning for Gmail connector

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