What is included?

1on1 Requirement Gathering session
Lead Management Setup:
- Object setup,
- 10 Custom fields
- 1 Page layout
- Lead field mapping (Lead conversion)
- List views

Account & Contact Management Setup:
- Object setup,
- 10 Custom fields
- 1 Page layout
- List views

Opportunity Management Setup:
- Sales Processes (Opportunity Stages); includes the setup of Salesforce guidance for success for the Sales path.
- Object setup,
- 10 Custom fields
- 1 Page layout
- List views

Task Management Setup:
Reports and Dashboards:
- Evolving-Consulting out of the box reports
- Evolving-Consulting out of the box Sales Dashboard

App Setup:
- Custom Sales app
- Custom Home Page

Email Sync
Standard Duplicate and Matching rules
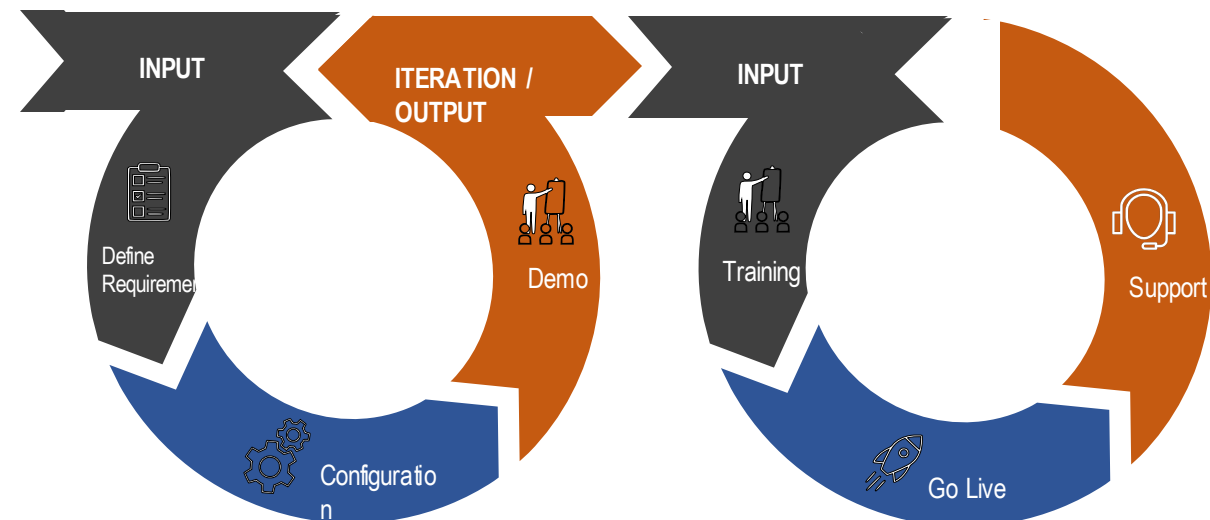**Security Setup (Profiles)**
Up to 3hrs of Data Upload
2hrs of custom training

SALES CLOUD JUMPSTART : Essentials

Quick and easy implementation, you will receive a tailored setup based on industry best practices, guidance from our experts, training session and support during Go-Live.

📅 3 Weeks
PRICE: $2,500

INPUT — ITERATION / OUTPUT — INPUT

Define Requirement — Configuration — Demo — Training — Go Live — Support

Not In Scope: *Process Automation - Approvals, Workflows, Process Builders, Flows; 3rd Party Integrations; Advanced Features such as Products, Price books, Quotes configurations; Work or Training in Sandbox Environment; Custom Code - Apex Triggers, Apex Code*