



PARTNER
SINCE 2019

Let the experts at Dextara get your business started with Salesforce fast! Our Quick Start option provides our organization with the world's #1 CRM fully customized to meet your unique business needs. Get started in weeks not months. We offer quick start plans for **Service Cloud, Sales Cloud, and Marketing Cloud Account Engagement (Formerly Pardot).**

Service Cloud Quick Start Services Summary



Project Management

- User Management
- Permissions (Profile, Role, Group, Permission Sets)



Case Routing

- Import Cases from Web, Phone, or Email
- Design Case Assignment /Routing Process



Reports & Dashboards

- Configure up to three (3) Reports and one (1) Dashboard



Platform Setup

- User Setup
- Security and Profiles
- Organization Setup



Case Management

- Setup of three (3) Customer Service Processes (Cases)
- Setup Service Console, Milestones and List Views



Data Migration

- Advise on Data Prep
- Import Client provide Data Files



Account & Contact Management

- Configure up to three (3) list views
- Configure Account and Contact Lightning Pages
- Update to Support Case Management



Roll Out & Go-Live

- User Testing
- Training
- Post Go-Live Support

Who We Are

5/5

Salesforce
AppExchange
Rating

3+

Years as a
Salesforce
Partner

180+

Certified
Salesforce
Experts

70+

Projects
Completed

40+

Global
Clients

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