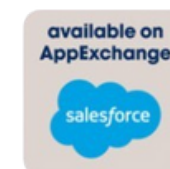


# CONCLO TECHNOLOGIES

REGISTERED CREST SALESFORCE PARTNER



**CONCLO  
TECHNOLOGIES**

## CONCLO Tech Chennai

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# Salesforce Implementation



At CONCLO Technologies, we take pride in our extensive experience in Salesforce implementation, ensuring seamless digital transformation for our clients. As a CREST Gold Partner of Salesforce, we have successfully executed multiple projects across various industries, enabling businesses to enhance their operational efficiency, customer engagement, and scalability. We don't just deliver; we align Salesforce to your exact business needs with scalable, smart configurations.

Your Salesforce journey starts with a solid foundation. Let's build it right.

With CONCLO, it's not just implementation—it's transformation.



# Starter Suite Basic Setup

## Setup Phase

- Create Roles, Profiles, and Users, and assign appropriate Permission Sets

## Configuration Phase

- Configure Company Information and Admin User Details
- Configure the Home page and card layouts
- Configure standard lead duplication
- Configure Picklist Values for Lead and Opportunity objects

## Customization

- Customize Object Layouts (remove unnecessary fields and adjust layouts as needed)

## Data Load

- Data Load: Import up to 50,000 records for one module (Accounts, Contacts, Leads, or Opportunities) using the template

# Starter Suite Basic Setup

## Testing

- Basic Implementation Testing

## Documentation

- User management documentation
- Data management documentation

## Training

- We will provide a basic 2-hour training session of implemented Salesforce environment.
- The training will be conducted for the SPOC (Single Point of Contact) assigned by the client.
- Key topics will include:
  1. Overview of the modules and workflows
  2. End-user operations and navigation
  3. Best practices for daily use
- A recorded version of the training session will be shared post-session for reference and future use.





# THANK YOU!



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