



## STARTER

\$4,500 USD  
OR  
\$6,500 CAD

FAST CRM Launch

 2-3 WEEKS

Up to 5 Users



## GROWTH

\$9,000 USD  
OR  
\$12,500 CAD

Most Popular

 4-6 WEEKS

Up to 15 Users



## ADVANCED

\$16,500 USD  
OR  
\$22,500 CAD

Scaled Sales Ops

 6-8 WEEKS

Up to 30 Users

- ✓ Lead assignment rules
- ✓ Lead lifecycle setup
- ✓ Accounts, Contacts & Opportunities
- ✓ 1 Web-to-Lead form
  
- ✓ Lead assignment rules
- ✓ Lead lifecycle setup
- ✓ Accounts, Contacts & Opportunities
- ✓ 1 Web-to-Lead form
- ✓ Basic Sales Path
- ✓ Up to 3 small configurations
- ✓ Basic task creation
- ✓ Up to 3 email alerts/templates
- ✓ Up to 3 roles & permission sets
- ✓ Up to 20 custom fields
- ✓ Up to 5 page layouts
- ✓ 1 record type per object
- ✓ Up to 5 reports & 1 dashboard
- ✓ Up to 10,000 records / 4 objects
- ✓ 3 business days UAT
- ✓ 1 user training session
- ✓ 3 business days hypercare

- ✓ Lead assignment with routing conditions
- ✓ Custom lead statuses & qualification
- ✓ Accounts, Contacts & Opportunities
- ✓ Up to 2 Web-to-Lead forms
- ✓ 1 custom Email-to-Lead setup
- ✓ Sales Path for Leads & Opportunities
- ✓ Basic product configuration
- ✓ 1 standard price book
- ✓ 1 standard quote template
- ✓ 1 standard approval process
- ✓ Up to 5 automations + 2 custom automations
- ✓ Up to 5 email alerts/templates
- ✓ Up to 5 roles, permission sets & sharing rules
- ✓ Up to 2 custom objects, if required
- ✓ 25–40 custom fields
- ✓ Up to 10 page layouts & 5 Lightning pages
- ✓ Up to 2 record types per object
- ✓ Up to 10 reports & 3 dashboards
- ✓ Up to 50,000 records / 8 objects
- ✓ 1 week UAT, training & hypercare

- ✓ Advanced lead assignment logic
- ✓ Advanced qualification & source tracking
- ✓ Advanced Account & Contact setup
- ✓ Up to 3 Web-to-Lead forms
- ✓ Up to 2 Email-to-Lead setups
- ✓ Multiple Sales Path configurations
- ✓ Product setup with price books
- ✓ Up to 2 standard quote templates
- ✓ Up to 2 approval processes
- ✓ Up to 8 automations + 4 custom automations
- ✓ Advanced task automation
- ✓ Up to 8 email alerts/templates
- ✓ Up to 8 roles & permission sets
- ✓ Up to 10 sharing rules
- ✓ Up to 4 custom objects, if required
- ✓ 50–75 custom fields
- ✓ Up to 15 page layouts & 10 Lightning pages
- ✓ Up to 3 record types per object
- ✓ Up to 20 reports & 5 dashboards
- ✓ Up to 100,000 records / 10 objects
- ✓ 1 week UAT + 2 weeks hypercare

### Required Licenses

Starter Suite or Pro Suite	Pro Suite or Sales Cloud Enterprise	Sales Cloud Enterprise or Unlimited
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### OUT OF SCOPE

- Complex Apex development
- ERP, SAP, middleware, CTI, social platform, accounting, or third-party integrations
- Experience Cloud / Customer Portal / Partner Portal
- Complex pricing rules, product rules, discount rules, bundles, amendments, renewals, or subscription billing
- Large-scale, unstructured, or API-based data migration
- Forecasting customization beyond standard setup
- Custom mobile app development
- Third-party AppExchange app license cost or vendor configuration unless separately scoped
- End-user adoption program beyond the included training sessions
- Custom LWC development
- MuleSoft, Boomi, Zapier, Workato, or any integration middleware setup
- Revenue Cloud / CPQ advanced configuration
- Complex quote and approval processes
- Advanced territory management
- Sales Engagement, Account Engagement, Marketing Cloud, or Data Cloud implementation
- Custom document generation tools unless separately scoped
- Ongoing managed services after hypercare
- Data cleansing, enrichment, or manual deduplication beyond stated package limits

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