

QUICKSTART

SALESFORCE ONBOARDING

You've acquired Salesforce and now you're ready to get your team up and running quickly. Our team is here to help. With our team you get an experienced partner with enterprise level experience and knowledge to help you and your team quickly maximize the value of your investment. Our Quick Start package is a pre-defined project for up to 10 users that focused on implementing your solution in 30 to 60 days.

PLANNING AND ANALYSIS

You will receive a dedicated project manager and analyst who will kick-off your project with a workshop to understand your requirements and sales process. With our Quick Start you will receive:

A dedicated Project Manager and Analyst

A kick-off and requirements call for up to 2 hours

An implementation plan for your project

TECHNICAL SETUP

Once we have your requirements our team will get to work.

With our Salesforce Quick Start you will receive the following configurations:

Standard Object Configurations for Leads, Accounts, Contacts, Opportunities and Campaigns:

- Up to 15 custom fields per Object
- Up to 2 Record Types and 2 Page Layouts per Object
- Up to 3 validation rules per object

Security Configurations:

- Role Hierarchy Setup
- 2 Custom Profiles¹

Up to 2 custom objects

Outlook Configurations²

Up to 5 Workflows and 3 Email Templates

Data Migration for Leads, Accounts and Contacts⁴

Up to 16 Reports and 2 Dashboards

TRAINING

Following the technical setup of Salesforce our team will provide 2, 2-hour end-user training sessions for your team and 4 hours of administrator training or configuration support for up to 2 weeks.

PRICE: \$4,900

¹ Enterprise Edition only

² Outlook Configurations includes configuring the Salesforce for Outlook connector within Salesforce.com. The configuration does not include the install or setup of the connector on users' computers.

³ The following objects are not included in the Quickstart packages: Products, Price Books, Quotes and Cases

⁴ Data Migration is the import of a single Excel file for each type of data (Leads, Accounts and Contacts) and does not include any exporting of data, cleaning of data or data translations

LEARN MORE AT SMBHD.COM OR CALL (773) 888-7900, EMAIL SALES@SMBHD.COM.

