Apps Associates Salesforce Sales Cloud QuickStart Offerings

apps associates®

salesforce PARTNER

A highly adaptable platform that can handle:

- Lead/Account/Contact Management and Opportunity/Product Configuration
- Channels & Digital Engagement and Automatic Workflows as well as Instant Metrics

Salesforce Sales Cloud QuickStart Package 1

- ✓ 8-hour Discovery session/kickoff
- ✓ 4 weeks in length
- ✓ Setup of Accounts, Contacts, Opportunity, and Leads
    - » Includes basic Opportunity management (no product set up)
    - » Quoting will not be available in this package
- ✓ Basic user, sharing and security setup (up to 3 profiles)
- ✓ Single Lead Process
- ✓ A single Web to Lead set up from your website
- ✓ Up to 3 Validation Rules
- ✓ Standard Reports and Dashboard for Sales Cloud (up to 10 reports and 1 dashboard)
- ✓ Load up to 6 months or 500 records, per objective via a formatted excel spreadsheet
- ✓ Single Hands-On End-User Training Session

Salesforce Sales Cloud QuickStart Package 2

- ✓ 3-days discovery session/kickoff
- ✓ Project timeline 6 weeks in length
- ✓ Setup of Accounts, Contacts, Opportunities, and Leads
- ✓ Product Set up with 2 pricelists to support opportunity quoting
- ✓ Up to 3 Record Types with related Custom List views and page layouts
- ✓ Basic user, sharing and security setup (up to 3 profiles)
- ✓ Up to 3 Custom workflows, field updates or validation rules
- ✓ 1 Standard approval process
- ✓ 1 Email Communication Template
- ✓ Standard Reports and Dashboard for Service Cloud (Approx. 10 reports and 1 dashboard)
- ✓ Load up to 1 year or 1000 records, per objective, via a formatted excel spreadsheet
- ✓ Single Hands-On End-User Training Session

Salesforce Sales Cloud Custom Solution

- ✓ Depending on the complexity of process re-engineering, one to multiple weeks of discovery and design sessions to be held on site or remotely based on travel budget
- ✓ Custom Configuration of Standard Sales objects: Accounts, Contacts, Opportunities, and leads
- ✓ Product and Price list set up
- ✓ Develop and deploy custom objects to support enhanced business process enablement
- ✓ Based on requirements, creation of multiple Custom Fields per object
- ✓ Creation and deployment of multiple workflows (based on process needs) which may include:

    - » Field change
    - » Notifications
    - » Approval processes
- ✓ Email Communication Template
- ✓ Analytics (Custom Reports and Dashboards)
- ✓ Complex data loading from legacy systems
- ✓ Single Hands-On End-User Training Session and/or Train the trainer depending on size and complexity
- ✓ Price is dependent on the requirements identified and the level of effort. An Statement of work would be developed before any work is started