



# SALES CLOUD QUICK START



The Sales Cloud Quick Start is perfect for businesses looking to get Salesforce off to a flying start.

TASK	DESCRIPTION	TIME (DAYS)
✓ Requirements Gathering/ Solution Design	<ul style="list-style-type: none"> <li>Time dedicated for an on site 6 hour requirement gathering session at project onset with your delivery team, write up and design of the solution for your org.</li> </ul>	2.5
✓ Set-up	<ul style="list-style-type: none"> <li>Creation of up to 20 users and attributing them to Salesforce license types.</li> <li>Branding your custom salesforce application and login page with your company logo.</li> <li>Registration of your own custom Salesforce domain name.</li> <li>Creation of up to 3 security profiles to define access to objects.</li> <li>Setting up of a 3 level hierarchy with up to 10 roles that define access to Salesforce records.</li> </ul>	0.75
✓ Configuration	<ul style="list-style-type: none"> <li>Addition of 1 custom object with relationships</li> <li>Creation of up to 40 new fields</li> <li>Addition of up to 3 record types</li> <li>Designing page layouts for 4 standard Salesforce objects and 1 custom object</li> <li>Produce 3 one-page communication templates with appropriate merge fields</li> <li>Automate business processes through up to 10 workflow rules and 10 associated actions</li> </ul>	2.75
✓ Products, Pricebooks & Quotes	<ul style="list-style-type: none"> <li>Configuration of products, pricelists &amp; quotes for up to 1000 products. Branded quote template.</li> </ul>	1.00
✓ Analytics - Reports & Dashboards	<ul style="list-style-type: none"> <li>Creation of up to 10 custom reports feeding into up to 2 dashboards for specific users.</li> <li>Desired report metrics and KPI's to be identified by client at project outset and then incorporated into reporting.</li> </ul>	1.00
✓ Project Management	<ul style="list-style-type: none"> <li>Total time dedicated to all project documentation, calls, emails, meetings and ongoing communication throughout entirety of project.</li> </ul>	3.00
✓ Standard Data Import	<ul style="list-style-type: none"> <li>One time import of data for up to 4 objects as provided in pre-formatted XLS/CSV. Data not provided in required format will incur additional project time and cost.</li> </ul>	0.75
✓ UAT Driven Revisions	<ul style="list-style-type: none"> <li>Provision of documentation for testing and revisions based on user feedback.</li> <li>Time allocated based on client requirements.</li> </ul>	1.5
✓ Go Live Support/UAT Session Onsite	<ul style="list-style-type: none"> <li>Time dedicated to onsite support, to ensure a streamlined implementation.</li> </ul>	1.00
✓ On-site Training	<ul style="list-style-type: none"> <li>Training on best practice usage of Salesforce functionality</li> <li>Reporting how-to</li> <li>Logging and tracking activities</li> <li>Salesforce for outlook</li> <li>Designing list views</li> <li>Travel costs not included</li> </ul>	0.5
<b>TOTAL DAYS</b>		<b>14.75</b>

