



SALESFORCE QUICK START PACKAGES

Implementation, Customization &
Deployment

Introduction

Our quick start packages are designed to configure your Salesforce instance in a cost effective, professional manner. From simple setups to complex configurations, we have a package to fit your needs. The steps below outline the process:



- ✓ Business workflow discovery session
- ✓ Basic configuration of your Salesforce instance
- ✓ Required object configuration
- ✓ Automation rules to increase the efficiency of your users
- ✓ Profile setup and role hierarchy to enforce security requirements
- ✓ Email integration
- ✓ Report and dashboard configuration to get an overview of performance
- ✓ Data migration from your old system or spreadsheets
- ✓ Training for your users
- ✓ Support to ensure successful adoption and ongoing usage

Which Package?

We know every business is unique, which is why we've designed three different packages for you to choose from depending on your needs:

SMALL

\$2,500

All the basics required for a small sales team with a prescriptive sales process

- From prospecting to client management, including web-to-lead
- Sales process, opportunities, pipeline management
- Reports and dashboards
- 5 hours of training

MEDIUM

\$5,000

Your sales team is a bit more advanced, you need customer support process configured

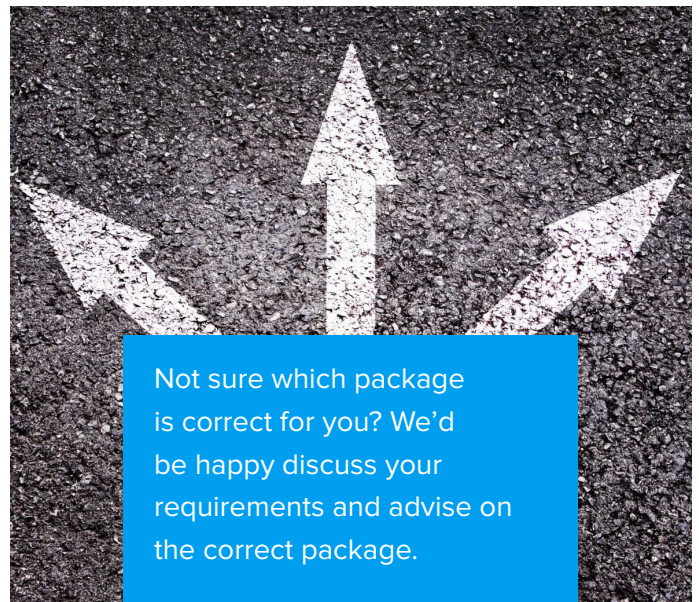
- Everything in the **Small package PLUS**
- Products up to 10k SKU's
- Support for case management
- Quoting
- 5 workflow automations
- 1 app integration ie: MailChimp, Insight, RingCentral
- 5 hours of training

LARGE

\$10,000

Sales environment is designed for heavy traffic

- Everything in the **Medium package Plus**
- 10 workflow automations
- 3 app integrations ie: MailChimp, Insight, RingCentral
- Up to 100k product SKU's
- 5 hours of training



Not sure which package is correct for you? We'd be happy to discuss your requirements and advise on the correct package.

Get in touch today!
(415) 636 - 7811 or
sales@konnectryx.com

What's Included

We know every business is unique, which is why we've designed three different packages for you to choose from depending on your needs:

OBJECT CONFIGURATION	SMALL	MEDIUM	LARGE
Leads	✓	✓	✓
Accounts	✓	✓	✓
Contacts	✓	✓	✓
Opportunities	✓	✓	✓
Activities	✓	✓	✓
Sales Processes	1	1	1
Cases	X	✓	✓
Campaigns	X	✓	✓
Quote Templates	X	2	5
Custom Object Configuration	X	3	5
Products	✓	✓	✓
Price Books	1	1	1

AUTOMATION	SMALL	MEDIUM	LARGE
Automation	3	5	10
Rules/Process Builder	X	1	3
Approved 3rd party App Integrations	✓	✓	✓
Web-to-lead	X	✓	✓
Web-to-case	X	✓	✓
Email-to-case	✓	✓	✓
Lead Assignment Rules Case	X	✓	✓
Assignment Rules Approval Processes	X	2	5

GENERAL CONFIGURATION	SMALL	MEDIUM	LARGE
General Setup	✓	✓	✓
Security	✓	✓	✓
Security: Role Hierachy	✓	✓	✓
Security: Custom Profiles	X	3	10
Security: Territory Management	X	X	✓
Multi-Currency	✓	✓	✓
Email Integration	✓	✓	✓
AppExchange Application Installs	X	1	3
Email Integration (Office 365/Gmail)	✓	✓	✓
Chatter Setup	✓	✓	✓

REPORTING	SMALL	MEDIUM	LARGE
Reports	5	10	15
Dashboards	2	3	5

DATA MIGRATION	SMALL	MEDIUM	LARGE
Leads	✓	✓	✓
Accounts	✓	✓	✓
Contacts	✓	✓	✓
Opportunities	✓	✓	✓
Products	✓	✓	✓
Opportunity Line Items	X	✓	✓
Custom Objects	X	✓	✓

TRAINING/ENABLEMENT	SMALL	MEDIUM	LARGE
Design Document	X	X	✓
Customised User Guide	X	X	✓
Follow Up Visit	X	✓	✓
User Training	5 hours	5 hours	5 hours

Ready To Get Started?

Our quickstart packages are the fastest way to get your team up and running with Salesforce. If

you would like to contact us you can email sales@konnectryx.com

Or if you prefer give us a call, we'd enjoy hearing from you [\(415\) 636 - 7811](tel:(415) 636 - 7811)

ABOUT US

Konnectyx is a longtime Salesforce consulting partner covering all aspects of the world's #1 CRM platform.

With hundreds of implementations, we have vast experience delivering success across all major industries. Our team provides a fast-track to success with your Salesforce platform.

CONTACT US

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