



# salesforce™ crm quickstarts for government



Fast, professional and affordable Salesforce CRM implementations for state and local government

## What's Included

- 2 Hour Discovery Session
  - Configure up to 30 users
- Assign basic profile, set up access security
- Lightning Home Tab, Custom App
  - Upload logo, create custom Salesforce App
  - Clean up and customize Home tab with Lightning components based on client needs
- Leads, Accounts and Contacts
- Edit Industries, Types and Sources picklists
  - For Lead Conversion, Map Fields
  - Page Layout cleanup: remove unused fields and related lists
  - Create Custom List Views
- Opportunities
  - Configure Source and other standard picklists
  - Page Layout cleanup: remove unused fields and related lists
  - Create Custom List Views
  - Add custom fields as needed
- Two Hours Custom User Training
  - Includes Search, Chatter, Activities, Leads, Accounts, Contacts, Opportunities, List Views and launching reports
- 30 Days Post Implementation Helpdesk Support
  - Limited to questions and adjustments related to configuration and customization done for Quickstart implementation
  - New functionality not included
- Two Hours Custom Admin Training
  - Topics include User setup, Page Layout editing, Picklist editing, basic report editing, Data Import Wizard, Email Templates
- Create HTML Email Template & set up HTML Email Header
- Configure duplicate record management rules
- Import Data into 4 Objects, up to 10,000 rows. Data cleanup services may be provided for an extra cost
- 6 Custom Reports and 6 Dashboard charts, graphs or gauges
- Create 1 additional custom record type and corresponding

- Page Layout. Configure security and other relevant settings
- Create custom user profile, configure App, Tab, Field and Record Type access
- Create up to 6 Data Validation rules
- Create up to 2 custom Workflows or Approvals
  - Options include automated email notifications, record and fields updates and more
- Configure up to 4 Marketing Campaigns
  - Import up to 2000 leads or contacts
  - Includes training on creating and using Campaigns
- Create one custom Object and relationship
  - Configure security & page layout
  - Import up to 1000 rows of data
- Add up to 24 custom fields to custom or standard objects
- Configure Salesforce for Gmail or Outlook Integration
  - Assist in installation, provide training resources for using app

### Platinum

- Configure up to 40 users
- Import Data into 5 Objects, up to 20,000 rows. Data cleanup services may be provided for an extra cost
- 12 Custom Reports and 12 Dashboard charts, graphs or gauges
- Create 2 additional custom record types and corresponding Page Layout. Configure security and other relevant settings
- Create up to 3 custom objects
- Add up to 48 custom fields to custom or standard objects
- 4 Hours total user training in 1 or 2 groups
- Create up to 10 Data Validation rules
- Create up to 4 custom Workflows or Approvals
- Configure web-to-lead and web to case
  - Configure automated responses and assignment rules
  - Does not include adding HTML to client website
- Install one App Exchange app. Limited to MailChimp, SurveyForce, any Salesforce Labs app. Other apps on a case-by-case basis
- Set up Content Library

	Gold	Platinum
Discovery/Business Process Review	✓	✓
Configure Users	30	40+
Leads , Accounts & Contacts	✓	✓
Opportunities	✓	✓
Activities (Tasks, Events and Email)	✓	✓
Record Types & Page Layouts/Object	2	2
# of Custom Fields	24	48
# of Custom Reports	6	12
Data Import (Objects; Rows)	4; 10,000	5; 20,000
User Training (Hours)	2	4
Follow-up Support (Days)	30	30
Custom Dashboard Charts or Graphs	6	12
Data Validation Rules	6	10
Admin Training (Hours)	2	2
HTML Email Templates	1	2
# of Custom Profiles	1	3
Custom Workflows or Approvals	2	4
Configure Marketing Campaigns	4	4
# of Custom Objects	1	3
Gmail or Outlook Integration	✓	✓
Web-to-Lead & Assignment Rules		✓
Web-to-Case & Assignment Rules		✓
Case escalation rules		✓
Economic Development Package		✓
App Exchange Products Installed		1
Setup Content Library		✓
Create Service Console		✓

v.GOV1217 Prices subject to change See website for current pricing

