

SALES CLOUD QUICK START *For* SMALL BUSINESSES



www.silversoftworks.com

Overview

- Two day Salesforce implementation to get you up and running as quickly as possible
- Everything you need for your business to be successful with Salesforce
- Ideal for businesses who are new to Salesforce
- 14 day free trial of our Salesforce support package

Cost: £1600 + VAT



Schedule

Day 1 (on site)

Customisation of the following objects to align with your business:

- Leads
- Account
- Opportunities
- Contacts
- Activities
- Products
- Up to 3 custom objects

For each of these objects, we will:

- Add new fields or amend existing fields to help you capture the data you need
- Ensure data integrity by adding validation logic
- Create up to 20 custom fields per object
- Customise picklist values
- Adjust page layouts
- Remove all unnecessary fields and distractions

Sales Pipeline

- Configure the lead sales process
- Set up lead conversion
- Create a web-to-lead HTML form so that you can capture leads from your website (customer responsible for adding the form to the website)
- Customise opportunity sales process

Reporting

- Create up to five reports and a related dashboard for the sales managers



Additional Services:

- Set up Salesforce for Outlook
- Set up Salesforce1 mobile access
- Chatter configuration
- Up to five automated processes (workflows, approval processes, process builder processes)

Data loading

- Provide you with data loading templates so that you can prepare your data for loading into Salesforce



Schedule

Day 2 (remote)

- Import data using data loading templates
- Data sign off by customer
- Remote show and tell/basic walkthrough



Support

We know that sometimes a requirement can get missed during a quick engagement, which is why we include a free trial of one of our Salesforce support packages as part of our Sales Cloud quickstart.

This entitles you to a total of four hours of additional consultancy to be used during the trial period for any tweaks, changes, or issues that you require help with.



Add On Services

Half Day Training Session

If you would like one of our consultants to train you and your team on the basic use of the system then we offer a half day training session on site.

Cost: £400



Contact

Contact Details

Phone Number: 01376 318800

Email Address: info@silversoftworks.com

Website: www.silversoftworks.com

Social Media

Twitter: [@SilverSoftworks](https://twitter.com/SilverSoftworks)

LinkedIn: www.linkedin.com/company/silver-softworks

Location

Silver Softworks
Cullen Mill
49 Braintree Road
Witham
Essex
CM8 2DD
United Kingdom

