ADITA
TECHNOLOGIES

ENTERPRISE QUICK START

Get yourself up and running in no more than 8 weeks time

BEGIN WITH US

salesforce sales cloud

salesforce registered consulting partner

OUR METHODOLOGY & APPROACH

Our definitive approach and agile methodology makes the project execution error free. We define requirements meticulously even the granular ones, that are easier to understand by your non-technical team members.

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REQUIREMENT UNDERSTANDING

Meticulous

STATEMENT OF WORK
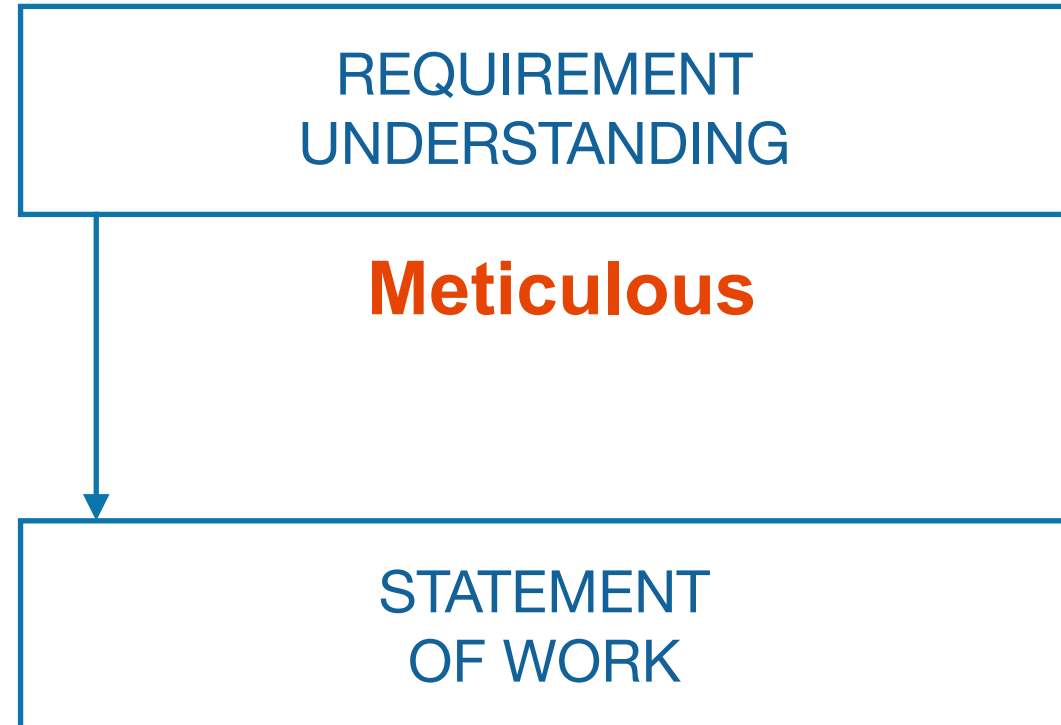
Definitive

NEXT STEPS

STEP 1

Discovery

Kick off call to go through Implementation checklist.

STEP 2

Build

Account configuration, content library, automations, data import…

STEP 3

Deploy

Thorough check by our intense testing process

STEP 4

Complete

Get your application solution blueprint

Sales Cloud Account Configuration

USER SETUP

- 20 users maximum
- 3 custom user profile
- Role hierarchy up to 5 level
- Configuring user personal settings
- Setting up out of the box user specific UI experience

COMPANY PROFILE SETUP

- Configuring fiscal year
- Company profile information
- Locale & Language preferences
- Setting up business hours
- Updating holiday list
- Customising lightning home page with out of the box useful components

LEADS , ACCOUNTS, CONTACTS & OPPORTUNITIES

- 20 custom fields per object
- 2 List Views per object
- Page layout configuration per object
- Customise sales process based picklist fields for each object respectively Source, Type, Industry, Status & Stage

- Map fields for custom lead conversion process
- Configure opportunity stages according to business process
- Upload 10,000 rows of data per object respectively
- Lead assignment rule 2 maximum to automatically assigning leads to sales reps
- Enable duplicate management rules for Leads and Contact

Sales Advancement

Team Selling

- Enable Sales Teams
- Create up-to 2 Opportunity Teams
- Create up-to 2 Accounts Teams
- Configure Opportunity Splits for Revenue sharing amongst team members

Collaborative Forecasting

- Enable forecasting
- Setup quotas
- Upload quota data for users
- Configure either Revenue or Quantity Based Forecast (Any 1)
- Setup forecast hierarchy
- Opportunity field mappings in quota view

Campaign Management

- Setup Campaign hierarchy
- Configure page layout
- Enable customised campaign influence
- Implement out-of-box influence model
- Configure opportunity layout and primary source capturing
- Create up-to 2 Campaigns
- Upload 2000 campaign member records

Sales Path and Sales Console

- Implement Sales Path feature to guide sales reps at every step of Sales process
- Create 1 Sales Console to access multiple application feature in one screen
- Maximum of 1 sales path configuration

Advance Configuration

Quotes, Products & Pricebook

- Enable Quotes
- Configure object layouts
- Customise 1 quote template
- Setup 2 Pricebook
- Configure 100 Products

Security and Accessibility

- Implement up-to 2 page layouts for each object (Leads, Contacts, Accounts, Opportunities
- Setup record level security for data privacy within internal team.
- Setup custom domain and login page

Extend Standard Sales Application

- Implement 2 custom objects
- 15 fields each
- Automated workflows and approvals maximum to 2 each
- Install 1 Appexchange app
- 2 communication template 1 HTML and 1 Text based
- Configure Salesforce 1 mobile app

Analytics & Automation Configuration

REPORTS & DASHBOARD

- Total of 15 reports
- 5 custom report type
- Reports can be comprised of Tabular, Summary or Matrix only.
- Total of 5 dashboard
- Maximum of 5 graph components each dashboard

VALIDATIONS & AUTOMATIONS

- Up to 10 basic validations for data integrity
- Total of 10 basic automations workflow rules or processes
- Automations are limited to basic email notifications
- Automatic task creations for basic sales process
- Automatic field updates based upon basic sales operations

DATA IMPORT TERMS

DATA TERMS

We propose a joint data mapping approach as described below:

- Client will provide an initial extract of client's subscriber data which is said to be their marketing list. It should include Subscription status (Active/Unsubscribes)
- Our team will then review client's data and will suggest the best practices to use that data in Sales Cloud.

DATA TRANSFORMATION

- The client team will transform client's data into the correct format as defined in the templates for upload into Sales Cloud objects.
- The client team will also perform de-duplication such that the data is ready for load into data extension.

DATA LOAD

- Once client's data is transformed into the correct format, we will import it into Sales Cloud objects.
- For quality assurance purposes, we will first complete a mock conversion, followed by the final conversion. (Iterations maximum 2)
- Once the data load is complete, we will work with the client team to assure data quality by running key data metrics.

OTHER TERMS

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TRANING

- Onboarding Training - 2-hour training session via web conference.
- If you request, we will record the training sessions and provide you with access.

ADDITIONAL TERMS

- The implementation price does not include the Salesforce license fees.
- The implementation is based on features of Salesforce which are generally available
- 1 week backup support limited to the scope of implementation and no new development or change request
- None of the scoped items in this package is replacable with any other scope that is not mentioned in this document.

EXCLUDED SERVICES

- This service does not include data cleansing, data loading or transformation services.
- Services not specifically identified above are not included in this quick-start service.
- Custom development of triggers, Visualforce pages, Sites and Flows.
- High end automation process and custom object relationships
- Additional support services can be purchased separately for data administration, custom CRM configuration, custom development, additional training.

Sales Cloud

- Additional reports and dashboard based upon companies key metrics
- Dynamic email templates for sales people to send directly from Salesforce
- Gmail or Outlook Integration with Salesforce to give you sync between contacts, emails and calendar
- Google Apps integration
- Robust automations according to your sales process
- Customer security and accessibility model to help protect sensitive data from different level of users.
- Multiple business process in same sales application
- (including Custom Objects)
- Enterprise Territory Management implementation
- Additional support services can be purchased separately for data administration, custom CRM configuration, custom development, additional training.

PREMIER SUPPORT PLAN

- Get additional support services from Adita to get maximum adoption and best ROI after implementation.
  T&C Apply

WHO WE ARE

ADITA TECHNOLOGIES

Adita Technologies is a Specialist Solutions Reseller and Services Company. We specialize in ERP, CRM, Marketing Automation and Internet of Things.

Adita is a Salesforce partner. We also work with several software vendors such as SAP, Microsoft, AWS and Google.

Adita Technologies is part of the Ayan Group. Ayan Group was formed in 2008 by several ERP and CRM consultants who have extensive experience in implementing large scale ERP and CRM implementation projects in several Iconic global organisation. Adita has strong presence in North America and in Asia Pacific region.

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