Salesforce Starter/Pro Suite Onboarding Implementation

The Salesforce Starter Suite and Pro Suite are the easiest way to get started with the world's #1 CRM, combining marketing, sales, service, and commerce in one place.

At CETDIGIT, we guide you through a fast and smooth onboarding process, ensuring quick implementation and your success!

Services	Starter Suite	Pro Suite
Sales Setup		
Kickoff/Alignment Call	✅	✅
Best practices Guidance	✅	✅
Setup and customize Account, Contact, Lead, and Opportunity objects.	✅	✅
Setup users and permissions to ensure proper access and security	✅	✅
Email Integration (Gmail or Outlook)	✅	✅
Setup Task Management and Activity Feed	✅	✅
Customize Reports and Dashboards.	5 reports	10 reports
Setup Salesforce Meetings	✅	✅
Configure calendar to manage appointments and tasks	✅	✅
Setup Direct Payment Links and Payment Portal*	✅	✅
Setup Products, Price Books, and import up to 250 products	✅	✅
Setup Quote Creation and Management	-	✅
Setup Forecast Management	-	✅
Service Setup		
Setup Integrated Email Support and Case Management	✅	✅
Setup Case Management	✅	✅
Setup Knowledge Management	✅	✅
Creating Custom Email Templates	2 emails	5 emails
Setup Macros	-	✅
Setup Omni-Channel Routing	-	✅
Setup In-App and Web Messaging	-	✅
Marketing Setup		
Setup Email Campaigns	✅	✅
Configuration of Smart Segmentation	✅	✅
Creating Email Templates	2 emails	5 emails
Setup Campaign Analytics	✅	✅

Services	Starter Suite	Pro Suite
Enhanced Capabilities		
Setup Social Sign-on	✅	✅
Guided onboarding & training	✅	✅
Creating custom fields	15	25
Creating custom objects	-	3 objects
Creating custom App	-	1 app
Creating Process Automation with Flows	-	2 flows
Total Service Hours and Additional Details		
Total Number of Hours	**15 hours**	**40 hours**
Onboarding, Implementation Duration	**2-4 weeks**	**3-6 weeks**
CETDIGIT Rate	**$1,500**	**$4,000**
Your Saving	**25%**	**35%**

Optional Commerce Setup

Services	Starter Suite	Pro Suite
Commerce Setup		
Storefront Website Design	✅	✅
Setup Products and Category Workspace	✅	✅
Setup Person Accounts and Buyer Groups	✅	✅
Setup Promotions	✅	✅
Setup Managed Checkout and Order Summaries	✅	✅
Insight Dashboards	✅	✅
Commerce Markets	1 region	3 regions
Search Management	✅	✅
Pay Now*	✅	✅

Notes:

1. The services outlined above serve as a guideline, with onboarding tailored to meet your unique business needs.
2. Commerce setup is optional; please reach out for a personalized quote.
3. Should the project require more hours than initially included, additional time will be billed at $110/hour.
4. For post-onboarding support, consider CETDIGIT's SMB Salesforce Growth & Support Plans.
5. *Regional availability may apply for Direct Payment Links, Payment Portal, and Pay Now.