

QUICK-START 3 DAY IMPLEMENTATION

AppShark’s Quick-Start 3 day Implementation Package is designed to get you started on your Salesforce Implementation in 3 days. The process involves the following stages:



Tentative Implementation Timelines

Day	Activity					
	Discovery	Configuration	Data Management	Reports	Training	Support
Day 1	✓	✓				
Day 2		✓	✓			
Day 3				✓	✓	✓

QUICK-START 3 DAY IMPLEMENTATION

ACTIVITY	DAY		
Discovery	Day 1	Day 2	Day 3
Discovery & Business Process mapping	✓		
Configuration	Day 1	Day 2	Day 3
Security Model Setup (OWD, Accessibility settings, Login & Access restrictions)	✓	✓	
User Setup(Role Hierarchy, Profile Setup, User creation, Public Groups, Queues) Up to 5 users Note: Custom Profiles are not available in Group & Professional editions	✓	✓	
Custom Fields up to 12, on Standard Objects Note: Custom Objects, up to 2, each with up to 12 fields each, using standard layouts.	✓	✓	
Page Layout Changes to up to 4 Standard Objects, typically Accounts, Contacts, Leads and Opportunities.	✓	✓	
Validation Rules – Up to 2 per object	✓	✓	
List Views – Up to 6	✓	✓	
Data Management	Day 1	Day 2	Day 3
Data import from a predefined CSV file. This covers only Accounts (with Contacts) OR Leads. Note: Customer supplies data in the predefined CSV file format which should be ready to be imported in SFDC.Data Cleansing or any other modifications to the data file (CSV) is not supported)		✓	

Reports	Day 1	Day 2	Day 3
Custom Reports using Report builder – Up to 3 reports			✓
Scheduling Reports Refresh (standard feature)			✓
Dashboards setup – 1 Dashboard			✓
Training, Review, Adjustments	Day 1	Day 2	Day 3
End User training on the functionality of the implementation How to use Salesforce basic functionality How to use all the customizations we did for you How to create your own Reports & Dashboards How to setup List Views, Creating custom fields etc.			✓
Project Management	Day 1	Day 2	Day 3
Customer communication & Project Management	✓	✓	✓
Support	Day 1	Day 2	Day 3
3 Hours of Post Implementation Support; to be used within 1 week after implementation is completed			✓

The following activities are out of scope of the project

- Communication Templates
- Custom development with APEX, Visualforce, Websites (Site.com /Force.com Sites), Pages, Triggers
- Salesforce to Salesforce
- Territory Management
- Visual Workflow
- Translation Workbench
- Marketing and Service Cloud features
- Data Extraction
- Data Import requiring a third party tool
- Reporting Snapshots
- Visualforce page reports
- Configuring a Reporting tool
- Training Material is provided which covers all the items from the solution and how to use the
- Implemented functionality
- Proactive Support



APPLICATIONS FROM VISION TO PRODUCTION

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About AppShark

Established in 2007, AppShark is a Salesforce Registered Consulting Partner with a customer satisfaction rating of 9.7 out of 10 on the AppExchange. In 2013, AppShark was acknowledged as a top Salesforce Consultant by Clutch (formerly SourcingLine).