

Salesforce™ Managed Services

Administration - Helpdesk - Training - Customization



WHAT'S INCLUDED

- Strategic Guidance for your Salesforce
- Personalized User Training
- Administration on demand- manage users, create reports & dashboards and more
- Implement and expand your Sales, Service or Marketing Cloud
- Custom development resources (Platinum only)
- All services provided by on-shore US based Salesforce certified consultants and developers

TERMS OF SERVICE

- Package pricing is for a 12 month subscription, paid in advance. 6 month and month-to-month agreements are also available, ask for pricing.
- Unused hours do not carry over and expire at the end of each month.
- A portion of the first month's hours will be spent reviewing the Client's Salesforce platform and developing the initial strategic roadmap.
- The Managed Services Package, including meetings, are delivered virtually via Summit Technologies-provided web conferencing.
- Summit Technologies will provide a consultant for the Client to use as a single point of contact.
- Summit Technologies will provide a semi-dedicated team to work on the enhancements/issues list
- Managed Services Packages are governed by our Master Services Agreement.

ADDITIONAL SERVICES

- Additional hours of managed services are sold in blocks of 4 hours and must be used during the month purchased.
- Technical resources (Apex development, Visualforce page creation, etc.) are sold in blocks of 5 hours/month and require a 2 week lead time.
- Large enhancements (those that require more than the monthly allotment) become projects that will be required to be scoped and priced separately

CLIENT RESPONSIBILITIES

- Participate in a monthly status meeting. The recurring meeting day and time will be mutually agreed upon between Client and Summit Technologies.
- Provide a list of requested enhancements/issues and will prioritize, with the Summit Technologies consultant, the work to be done.
- Provide a single point of contact to coordinate with Summit Technologies consultant.
- Respond to requests for information on a timely basis. Delays in request for information could prevent Summit Technologies from completing the work in a timely manner and therefore could result in forfeiture of time at the end of the month.

	Silver \$249/mo	Gold \$749/mo	Platinum \$1199/mo
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Hours Per Month	2.5 Admin	8 Admin	10 Admin/Dev
Salesforce Strategic Consultation	Yearly	2X Year	2X Year
Monthly status meetings	✓	✓	✓
Reports & Dashboards	✓	✓	✓
User Admin Security, Roles, Groups	✓	✓	✓
Training	✓	✓	✓
Custom Objects & Fields, Validation Rules	✓	✓	✓
Workflows & Approvals	✓	✓	✓
Custom List Views & Page Layouts	✓	✓	✓
Email & Quote Templates	✓	✓	✓
User Training & Helpdesk	✓	✓	✓
Price Book and Product Setup	✓	✓	✓
Salesforce1 Mobile App Setup	✓	✓	✓
Custom Sales Process	✓	✓	✓
Web-to-Lead & Assignment Rules	✓	✓	✓
Simple App Exchange Install		✓	✓
Gmail or Outlook Integration		✓	✓
Bulk Email Integration (Mail Chimp, Constant Contact, etc)		✓	✓
Sales or Service Console Setup		✓	✓
3rd Party Integration via API			✓
Apex Triggers			✓
Visualforce Custom UI Development			✓
Salesforce Business & Gap Analysis			✓
Custom Development Project Plans			✓
Marketing Cloud Implementation			✓
Community Cloud Implementation			✓
Complex App Exchange Install			✓

Call us today! 614-859-6543
Visit us at summittechnologiesllc.com

