

SALESFORCE.COM VIRTUAL ADMINISTRATOR SERVICE

Per-Incident Support to keep your Salesforce.com System Working Well

Salesforce.com is the world's most popular on-demand SFA solution, and it's also very stable and reliable.

But SFDC customers need to have a system administrator to keep the system configured to meet the users' and executives' needs. From deduping leads to creating custom fields to writing new reports, some part of the system needs to be reconfigured or updated. Sometimes on a weekly basis.

Salesforce offers Premier Support with Administration, which provides wide-ranging expertise on a 24x7 basis. In order to provide this round-the-clock support, however, Salesforce has to price this service as a **monthly retainer - whether you use the service or not**. This can get expensive, particularly if your organization is on Professional Edition.

Up to now, your choice has been to sign up for SFDC's Premier Support with Administration, or to hire a person to be a part-time SFDC administrator. These can be expensive.

SalesLogistix now offers a third alternative: per-incident system administrator support that costs you **nothing unless you use it**. And when you do use it, you get the knowledge and expertise of SalesLogistix.

How It Works:

- **Sign up** - Our standard contract is short and involves no signup fees or monthly retainer.
- **Set up** - Create a system administrator user in your SFDC system so we can login. We'll familiarize ourselves with your system, taking notes and documenting anything unusual we find. These notes will be stored in your system's *Documents* area. This setup session is typically one hour's chargeable time.
- **Write Up** - Write up the problem(s) you need to have solved, or the items you need modified, reconfigured, or turned on. *The more advanced notice you can give us, the more we can do for you*. You'll have an email address for the virtual administrator, and you'll have a phone number in case you need to escalate your problem.
- **Response times** - We are able to offer you this service because of *relaxed* response times: 2 business days, on a 5x12 basis. While these response times are similar to SFDC's *Basic* Support, we offer expertise and system configuration changes that are similar to their *Premium* Support (see the next page for the items we take care of).

Covered Administrative Tasks

- **User and Login support**
 - Activate or Deactivate users
 - Fix locked accounts
- **Roles and Profiles**
 - Manage role hierarchies
 - Manage forecast hierarchies
 - Manage profiles
- **Home Page**
 - Update user messages
 - Create useful links and shortcuts
 - Change home page layouts
- **Tabs**
 - Remove / reorder tabs
 - Rename tabs and objects
 - Change tab page layouts
- **Leads, Contacts and Accounts**
 - Update standard and custom fields
 - Modify formats and default values
 - Maintain pick lists
 - Maintain queues
 - Update History Tracking
 - Modify page layouts
 - Assign page layouts to users
- **Activities and Campaigns**
 - Update standard and custom fields
 - Modify formats and default values
 - Maintain pick lists
 - Modify page layouts
 - Maintain record types
 - Generate web integration links
- **Opportunities and Forecasts**
 - Update standard and custom files
 - Modify formats and default values
 - Maintain pick lists
 - Update sales rep quotas
 - Modify page layouts
 - Assign page layouts to users
- **Reports and Dashboards**
 - Create and maintain
- **Data Management**
 - Preprocess / import Leads or Contacts
 - Mass transfer or delete records

Costs

- **For the items included in the list above,** system administration is available at \$175 per incident (up to one hour).
- **For items beyond the list above, for faster turn-around, or for off-hours response,** system administration is available at \$250 per incident (up to one hour).

About SalesLogistix

SalesLogistix is a California consultancy dedicated to implementing Salesforce systems **tailored to the business processes of our clients.** Because we closely align system design to the way firms actually work, our clients experience the rapid user adoption that's critical to system success and credibility.

SalesLogistix' founder, David Taber, is the author of the upcoming Prentice Hall book on SFDC best practices.

