Project Kick-Off

Salesforce Editions: Contact, Group, Professional, Enterprise, Performance, Developer

MK Partners Service: Every project needs a kick-off call, led by an MK Partners Project Coordinator. The main goals of the meeting are to establish timeframes for completion, login access to Salesforce, and project roles such as the project manager, developer, etc.

Hello John,

My name is Valerie Prendiz and I am your Project Coordinator here at MK Partners. I CC’d Carla because she will be your Project Manager. I wanted to provide you with some dates and times, to schedule the kick off call. Please select the time frame that works best for you and I will set up the calendar invitation and confirmation. Also, the kick off call will be about 20 to 30 minutes long, it will allow us to go over the outline of the project, and introduce ourselves.

Here are the available time frames Pacific Time.

Monday, June 2nd at 10:00am
Tuesday, June 3rd at 11:00am

Please let me know which time frame works best for you and I will send out the calendar invite. Also if you have any questions or concerns, please contact me and I will provide you with solutions.

Thank you,

Valerie
Project Plan

Salesforce Editions: Contact, Group, Professional, Enterprise, Performance, Developer

MK Partners Service: Customers who want to track project progress can opt for a project plan to be created. Typically these plans include specific tasks and owners assigned to complete those tasks. Typically this service will include a once-weekly revision of the project plan to be shared via email to a group of stakeholders. The project plan is created using Microsoft Project.
**Business Process Walkthrough**

**Salesforce Editions:** Contact, Group, Professional, Enterprise, Performance, Developer

**MK Partners Service:** A project manager will conduct a Business Process Walkthrough which begins with an evaluation of the current practices, which is done through a thorough analysis of the people, process, and existing technology involved. The walkthrough helps identify the critical success factors, such as the areas an organization must perform well in order to be successful. The project manager will also discuss the existing problems to be solved during the Salesforce implementation. The idea behind a business process walkthrough is to provide a more efficient use of resources by using Salesforce and the available tools for automation.
**Leads Setup**

**Salesforce Editions:** Contact, Group, Professional, Enterprise, Performance, Developer

**Feature Description:** Leads are people you've encountered, or lists you've purchased that remain to be qualified to do business with your organization. For example, purchasing a list of homeowners in order to sell them mortgage refinancing would first be imported as Leads into Salesforce. Once a sales person determines that a Lead is qualified to do business with the company, it is converted to be a Contact & Account record. Leads are for unqualified prospects, whereas Contacts are qualified.

**MK Partners Service:** A project manager will modify the lead layout and fields to ensure all the relevant sales and pre-qualifying data is stored on the prospect's lead record in Salesforce.

---

**Christie Winters**

---

**Lead Detail**

- **Lead Information**
  - Lead Owner: Justin Davis (Channel)
  - Name: Christie Winters
  - Title: Sales
  - Company: Visitation Relief Center
  - Lead Source: Package Installation
  - Referred By: [Email]
  - Next Step: [Email Out]
  - Lead Status: Open

- **Notes**
  - Description:
  - Notes:

- **Company Information**
Mass Email Configuration

Salesforce Editions: Professional, Enterprise, Performance, Developer

Feature Description: You can send mass email to a maximum of 1,000 external email addresses per day per organization based on Greenwich Mean Time (GMT). The maximum number of external addresses you can include in each mass email depends on your edition. The single and mass email limits don't take unique addresses into account. For example, if you have johndoe@example.com in your email 10 times, that counts as 10 against the limit.

MK Partners Service: A project manager will create list views and provide a walkthrough of how to send mass emails directly from Salesforce.
HTML Email Template

Salesforce Editions: Group, Professional, Enterprise, Performance, Developer

Feature Description: HTML email template is an email that is formatted like a web page, using colors, graphics, table columns and links. Imagine any newsletter received by email. That’s most likely what HTML email looks like. Plain text email is an email that only includes text. Salesforce has the ability to generate these HTML email templates so recipients receive a professional-looking email.

MK Partners Service: A project manager will create one or more HTML email templates with a variety of customer-requested logos, graphics, and designs. The email template can then be used to send a mass email, can be used with any workflow automation or auto-response rules, or can be used to send one single email at a time from Salesforce.

mkPartners

{ILead.FirstName},

Thanks for stopping by our booth at Dreamforce '10.

I'm sure you saw a lot of amazing demos and powerful new features at the conference.

As you may recall, MK Partners is the fastest growing provider of Salesforce consulting services and we specialize in customizing Salesforce to make organizations like yours more efficient.

If you have time this week, I'd love to schedule a brief call to discuss any customizations that you would like made to your Salesforce.

Merrick Lackner
Account Executive
MK Partners
mlackner@mkpartners.com
Direct: 818.851.7862
Fax: 310.424.2982
GSA: 70 GS-35F-0050X
Merrick Lackner

Click here to update your email preferences:
http://www.mkpartners.com/contact/subscriptions
Web to Lead

Salesforce Editions: Group, Professional, Enterprise, Performance, Developer

Feature Description: Web to Lead allows Salesforce customers to replace their "Contact Us" form with a special salesforce form that will create Leads directly into Salesforce.

MK Partners Service: A project manager or developer will create an HTML form and provide to a web designer, or will assist the company in actually posting to their website.

Create a Web-to-Lead Form

Select the fields to include on your Web-to-lead form:

Available Fields
- Salutation
- Title
- Website
- Phone
- Mobile
- Fax
- Address
- Zip
- Country

Selected Fields
- First Name
- Last Name
- Email
- Company
- City
- State/Province
- Up
- Down

NOTE: Would you like to add custom fields to collect additional information?

After users submit the Web-to-Lead form, they will be taken to the specified return URL on your website, such as a “thank you” page.

Return URL
http://www.mkpartners.com

Language
Default

Generate  Cancel

Let's keep in touch

First Name (required)

Last Name (required)

Company (required)

Email (required)

Phone (required)

Message (required)

Submit

Return to Top
**Lead Assignment Rules**

**Salesforce Editions:** Professional, Enterprise, Performance, Developer

**Feature Description:** Lead assignment rules will change the owner of a newly created or reassigned lead based on a set of rules defined by the system administrator. Lead assignment rules are executed sequentially. The first rule where the record matches the rule criteria will determine the record owner.

**MK Partners Service:** A project manager will work with a sales or marketing manager to determine how leads should be assigned to individual sales reps. For example if a sales rep works in the California territory, all new California leads can be sent to that sales rep. Or if a company has sales reps assigned by products, then specific product interest leads will be routed to those appropriate sales reps alternatively.
Contacts & Accounts Setup

Salesforce Editions: Contact, Group, Professional, Enterprise, Performance, Developer

Feature Description: Contacts are used to track the individuals you're doing business with, and Accounts are used to track the business entities. For example, if you're working with Sam over at ABC Distributing, Sam would be considered a Contact record, and ABC Distributing is considered to be the Account.

MK Partners Service: A project manager will configure the existing fields and create new ones as appropriate to store the relevant information desired on these records.
Salesforce for Outlook App

Salesforce Editions: Contact, Group, Professional, Enterprise, Performance, Developer

Feature Description: Salesforce for Outlook, a Microsoft® Outlook® integration application that is installed, syncs contacts, events, and tasks between Outlook and Salesforce. In addition to syncing these items, a user can add Outlook emails and events to multiple Salesforce contacts, and view Salesforce records related to the contacts and leads on emails and events—all directly in Outlook.

MK Partners Service: A project manager will configure the synchronization options, which include one-way or two-way, conflict resolution, and the selection of which records will participate in the sync process. The project manager will also assist in the installation of the app on the local machine(s) desired to run the outlook sync.
Cases Setup

**Salesforce Editions:** Group, Professional, Enterprise, Performance, Developer

**Feature Description:** Cases are used to track customer service requests. For example if a customer calls in and needs to update their credit card number, a new case would be created. The fields on the cases are custom tailored to businesses processes.

**MK Partners Service:** A project manager will create new fields and modify existing fields to facilitate a customer service department's needs.

---

### Case 00001024

**Case Detail**

<table>
<thead>
<tr>
<th>Case Owner</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Justin Davis</td>
<td>New</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Alternate Case Owner</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Low</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Case Number</th>
<th>Case Origin</th>
</tr>
</thead>
<tbody>
<tr>
<td>00001024</td>
<td>Web</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Case Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lauren Boyle</td>
<td>Equipment Design</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Account Name</th>
<th>Warranty Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Oil &amp; Gas Corp</td>
<td></td>
</tr>
</tbody>
</table>

### Payment Information for Non-Warranty Purchases

<table>
<thead>
<tr>
<th>Credit Card Number</th>
<th>CV2 Security Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Case Details

<table>
<thead>
<tr>
<th>Subject</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design issue with mechanical rotor</td>
<td></td>
</tr>
</tbody>
</table>

### System Information

<table>
<thead>
<tr>
<th>Created By</th>
<th>Last Modified By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Justin Davis, 8/17/2012 8:58 AM</td>
<td>Justin Davis, 8/17/2012 8:58 AM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date/Time Opened</th>
<th>Date/Time Closed</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/17/2012 8:58 AM</td>
<td></td>
</tr>
</tbody>
</table>

### Case Comments

<table>
<thead>
<tr>
<th>New</th>
</tr>
</thead>
</table>

---
Communities Portal

**Salesforce Editions:** Enterprise, Performance, Developer

**Feature Description:** Connect directly with resellers, distributors, and partners to increase sales volume. Enable partners to find experts, collaborate on deals, manage funds, and access critical information from any location. Communities allows customers, employees, and partners to collaborate on business objects like accounts, opportunities and campaigns. Community members can share files, qualify leads, or team up on support cases - all from within the community. Communities can be easily customized to reflect the brand and online customer experience desired. Create a stunning environment that makes Salesforce Communities a seamless extension of the corporate identity.

**MK Partners Service:** A project manager will enable and configure the Communities Portal to allow distributors, partners, contractors, and customers to have access to a limited and restricted area of the Salesforce application. Common uses include the ability to create cases and leads by customers and partners for faster collaboration with other internal salesforce users.
Case Assignment Rules

Salesforce Editions: Group, Professional, Enterprise, Performance, Developer

**Feature Description:** Typically an organization will have one rule to route as the customer service department deems necessary. This feature allows a customer service manager to designate certain individuals to receive certain cases based on the case type, or for example route the case of a VIP customer to the service manager directly. Each rule consists of multiple rule entries that specify exactly how the leads or cases are assigned. For example, your standard case assignment rule may have two entries: cases with “Type equals Gold” are assigned to “Gold Service” queue, and cases with “Type equals Silver” are assigned to “Silver Service” queue.

**MK Partners Service:** A project manager will create one case assignment rule with multiple criteria to determine if a specific user or queue should own the case. The project manager will work with the service team to map out the ideal case routing scenario, and then implement this scenario using assignment rules in Salesforce.
Case Escalation Rules

Salesforce Editions: Professional, Enterprise, Performance, Developer

Feature Description: Typically, your organization will have one escalation rule that consists of multiple entries which specify exactly how the cases are escalated. For example, your standard case escalation rule could have two entries: cases with Type set to Gold are escalated within two hours, and cases with Type set to Silver are escalated within eight hours. The purpose of this is to ensure that high-priority cases aren't neglected.

MK Partners Service: A project manager will create escalation rules that will automatically re-assign the case to a queue or other user in Salesforce. This is typically facilitated through working with the service manager to determine after how many hours a case should be assigned if it's not being actively worked for resolution.
Web to Case

Salesforce Editions: Group, Professional, Enterprise, Performance, Developer

Feature Description: Gather customer support requests directly from the company’s website and automatically generate up to 5,000 new cases a day with Web-to-Case. This can help an organization respond to customers faster, improving support team productivity. The actual web to case form is simple HTML which is placed on the website used to gather customer feedback or issues.

MK Partners Service: A project manager will create one or more web to case forms and assist in posting those forms on the website of choice. If a web designer so desires, the project manager can email the web to case form code directly to that person to post the form on the site.

Steps to Capturing Cases from Your Website

1. Web-to-Case has been enabled for your organization. Modify your setup to:
   - Disable Web-to-Case
   - Select the automatic email response template
   - Select a Case Origin for all online cases

2. Set up custom case fields
   Setup custom case fields for the information you want to gather from your website.
   Tell me more > Setup custom case fields

3. Generate the HTML
   Generate the HTML needed to capture case data and give it to your webmaster to include on your website.
   Tell me more > Generate the HTML

Steps to Capturing Case Information from Your Website

Using pre-existing pages on your company's website, you can capture contact and case information from users and automatically open to respond in real-time to customer requests.

Capture Cases

Select the fields to include:

- Company
- Type
- Status
- Case Reason
- Priority
- Case Currency
- Case Related Type
- Case Category
- Details

NOTE: Would you like to add custom fields that you need? You can set up custom fields to gather case information.

Enter the URL that the user will be returned to:

[URL]

Language: Default

[Generate][Cancel]
Auto Response Rules

Salesforce Editions: Professional, Enterprise, Performance, Developer

Feature Description: An auto-response rule is a set of conditions for sending automatic email responses to lead or case submissions based on the attributes of the submitted record. Applicable leads include those captured through a Web-to-Lead form. Newly submitted cases can also have a response rule sent back to the submitter.

MK Partners Service: A project manager will create an auto-response rule that will send a designated email via template from Salesforce.
Email to Case

**Salesforce Editions:** Group, Professional, Enterprise, Performance, Developer

**Feature Description:** Email to Case allows Customers to receive inbound emails directly into their Salesforce org, and convert them directly to cases. For example, support@mkpartners.com will create a Case record (similar to the idea of a customer ticket) in Salesforce. This makes it easy for customers to simply email issues they're having, rather than filling out a form or calling a toll-free number instead.

**MK Partners Service:** A project manager will work with the company email system administrator to create one separate email account that will be forwarded to Salesforce and have cases created.

### Email to Case Settings

1. To create cases from Outlook, select the options Enable Email-to-Case, as well as Enable On-Demand Service.
2. After you enable Email-to-Case, you can't disable it. You can, however, disable the On-Demand Service.

- Enable Email-to-Case: ✔
- Notify Case Owners on New Emails: ✔
- Enable HTML Emails: ✔

When sending email from a case, insert Thread ID in the following sections:
- Email Subject: ✔
- Email Body: ✔

### On-Demand Service

On-Demand Email to Case enables your organization to automatically create cases from email without having you download and install the Email-to-Case agent behind your network's firewall. Simply configure your email system to forward case submission emails to the Email Services Address provided to you by salesforce.com.

- Enable On-Demand Service: ✔

### Failure Response Settings

- Over Email Rate Limit Action: Require message
- Unauthorized Sender Action: Bounce message

### Routing Addresses

<table>
<thead>
<tr>
<th>Source</th>
<th>Routing Name</th>
<th>Case Owner</th>
<th>Email Address</th>
<th>Verification</th>
<th>Email Services Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email2Case</td>
<td><a href="mailto:support@mkpartners.com">support@mkpartners.com</a></td>
<td><a href="mailto:support@mkpartners.com">support@mkpartners.com</a></td>
<td><a href="mailto:support@mkpartners.com">support@mkpartners.com</a></td>
<td>Verified</td>
<td><a href="mailto:support@mkpartners.com">support@mkpartners.com</a></td>
</tr>
</tbody>
</table>

**Return to Top**
Opportunities Setup

Salesforce Editions: Group, Professional, Enterprise, Performance, Developer

Feature Description: Opportunities are the sales and pending deals that you want to track. By adding opportunities, you’re building your “pipeline,” which contributes to your sales forecast.

MK Partners Service: A project manager will create fields on and customize Opportunities to facilitate the sales process. For example companies with long sales cycle might have several opportunity stages, such as Prospecting, Nurturing, ID Decision Makers, Quoted, Follow-Up, Commit, and Closed/Won. Companies with shorter sales cycles might only need Prospecting, Quoted, and Closed/Won for their process. MK Partners works with sales managers to determine the correct process in Salesforce.

Opportunity EDIS SOW0001

Opportunity Detail

Opportunity Name: EDIS SOW0001
Primary Contact: Matthew Sargeant
Alternate Contact: Matthew Sargeant
Referred By: Matthew Sargeant
Type: Corporate
Close Date: 7/8/2014
Stage: Prospecting
Payment Terms: Upfront
Occurrence: New Business

Account Name: EDIS
Opportunity Owner: Jacklyne Paz (Chance)
Project Coordinator: Jacklyne Paz
Forecast Category: Pipeline
Amount: $5,400.00
Total Hours: 38.00
Project Leadership Desired: Project Coordinator Notes

Timeline

Last Attempt: 7/2/2014
Last Contact: 7/8/2014
Follow Up

System Information

Lead Source: Jacklyne Paz
Primary Campaign Source: Jacklyne Paz
Created By: Jacklyne Paz, 7/8/2014 11:22 AM
Last Modified By: Justin Davis, 7/8/2014 8:40 AM

Return to Top
Approval Process

Salesforce Editions: Enterprise, Performance, Developer

Feature Description: Approval Processes in Salesforce allow managers to require sales reps (or others) to request permission to advance on a record. For example, a common approval process is when sales reps request discounts over 10%.

MK Partners Service: A project manager will discuss the existing business approval process, and create the initial and final actions to go live. The approval process, once setup, will email an approval request to a designated approver, where that person can accept or reject the request.
**Products and Pricebooks**

**Salesforce Editions:** Professional, Enterprise, Performance, Developer

**Feature Description:** Salesforce Products and Pricebooks allows an organization to track and report on the products that have been sold on opportunities and quotes. The benefit is the ability to see which products (or services) are selling the most, or the ones selling the slowest or that require more aggressive discounting to get sold.

**MK Partners Service:** A project manager or developer will create individual pricebooks (wholesale vs. retail for example) and then create the individual products with pricing to be added on opportunities by sales reps.

### Product Detail

**Weld Head Model 71**

<table>
<thead>
<tr>
<th>Product Name</th>
<th>Weld Head Model 71</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Code</td>
<td>71</td>
</tr>
<tr>
<td>Created By</td>
<td>Justin Davis, 2/13/2013 3:10:05 AM</td>
</tr>
<tr>
<td>Product Description</td>
<td>Designed to fill defective areas in small-diameter nuclear plant piping.</td>
</tr>
</tbody>
</table>

### Standard Price

<table>
<thead>
<tr>
<th>Action</th>
<th>Standard Price</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>$3,000.00</td>
<td>✔</td>
</tr>
</tbody>
</table>

### Price Books

<table>
<thead>
<tr>
<th>Action</th>
<th>Price Book Name</th>
<th>List Price</th>
<th>Use Standard Price</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Arc Machines 2013</td>
<td>$3,000.00</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>

Always show me 🔄 more records per related list
Quoting

Salesforce Editions: Professional, Enterprise, Performance, Developer

Feature Description: A quote is a record showing proposed prices for products and services which is created from an opportunity and its products. Each opportunity can have multiple associated quotes, and any one of them can be synced with the opportunity. When a quote and an opportunity are synced, any change to line items in the quote will sync with products on the opportunity, and vice versa. When the quote is ready to send, a PDF can be generated and emailed to any Contact in Salesforce. Quote PDFs are based on fully customizable templates.

MK Partners Service: A project manager will review a sample quote provided, and then recreate this using the standard Quote template in Salesforce. Quotes typically include a large portion of static information such as terms of the purchase, with a dynamic section where actual line items are added to give a total price for the quote itself.
Campaigns Setup

Salesforce Editions: Professional, Enterprise, Performance, Developer

**Feature Description:** Campaigns are used to track outbound and inbound marketing activities. For example a newsletter sent to a list of contacts would be considered a campaign. An event sponsorship with booth attendees would be another example. Reporting on marketing effectiveness is an important principal and advantage to using Salesforce.

**MK Partners Service:** A projet manager will create and customize the fields on Campaigns for better tracking of marketing efforts. This typically includes setting up some of the existing and future campaigns as records.

---

<table>
<thead>
<tr>
<th>Campaign Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign Owner</td>
<td><a href="#">Justin Davis</a></td>
</tr>
<tr>
<td>Campaign Name</td>
<td>Dreamtoros 2010 [View Hierarchy]</td>
</tr>
<tr>
<td>Type</td>
<td>Seminar/Conference</td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Planning</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>12/1/2010</td>
</tr>
<tr>
<td>End Date</td>
<td>12/31/2010</td>
</tr>
<tr>
<td>Num Sent</td>
<td>0</td>
</tr>
<tr>
<td>Expected Responses (N)</td>
<td>0.00%</td>
</tr>
<tr>
<td>Expected Revenue</td>
<td>$100,000</td>
</tr>
<tr>
<td>Budgeted Cost</td>
<td>$50,000</td>
</tr>
<tr>
<td>Actual Cost</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Campaign Statistics</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Responses</td>
<td>1,292</td>
</tr>
<tr>
<td>Total Leads</td>
<td>1,358</td>
</tr>
<tr>
<td>Converted Leads</td>
<td>29</td>
</tr>
<tr>
<td>Total Contacts</td>
<td>20</td>
</tr>
<tr>
<td>Num Total Opportunities</td>
<td>8</td>
</tr>
<tr>
<td>Num Won Opportunities</td>
<td>1</td>
</tr>
<tr>
<td>Total Value Opportunities</td>
<td>$26,260</td>
</tr>
<tr>
<td>Total Value Won Opportunities</td>
<td>$10,000</td>
</tr>
</tbody>
</table>

| Created By          | [Justin Davis](#), 12/1/2010 8:06 PM |
| Last Modified By    | [Justin Davis](#), 12/1/2011 7:11 AM |

---

**Website Information**

**Custom Links**

- View All Campaign Members

---

**Campaign Hierarchy**

- Dreamtoros 2010

---

**Campaign Members**

<table>
<thead>
<tr>
<th>Action</th>
<th>Type</th>
<th>Status</th>
<th>First Name</th>
<th>Last Name</th>
<th>Company</th>
<th>Email</th>
<th>% of Demos</th>
<th>% of Installs</th>
<th>% of Test Drivers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Contact</td>
<td>Responded</td>
<td>Andy</td>
<td>Xavier</td>
<td>Espiretech</td>
<td><a href="mailto:andy@espiretech.org">andy@espiretech.org</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>Lead</td>
<td>Responded</td>
<td>Marie</td>
<td>afKoenker</td>
<td>Techno Systems AB</td>
<td><a href="mailto:marie@feriken.com">marie@feriken.com</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit</td>
<td>Lead</td>
<td>Responded</td>
<td>Javier</td>
<td>Atudes</td>
<td>Kimberly-Clark Corp</td>
<td>javier@<a href="mailto:abrilite@kcc.com">abrilite@kcc.com</a></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Workflow Automation

Salesforce Editions: Enterprise, Performance, Developer

Feature Description: Many of the tasks you normally assign, the emails you regularly send, and other record updates are part of your organization's standard processes. Instead of doing this work manually, you can configure workflow rules to do it automatically.

MK Partners Service: A project manager will create workflow rules to help automate redundant processes in Salesforce. These workflow actions include assigning new tasks to a user, role, or record owner; sending out email alerts to one or more recipients (also non-salesforce users such as customers); and automatically updating fields on records. For example if an opportunity becomes "closed won", a workflow rule can change the account status to "Customer" or "Active", as there is now an active contract/opportunity on that account.

![Workflow Automation Image]
Custom Object Setup

Salesforce Editions: Contact, Group, Professional, Enterprise, Performance, Developer

Feature Description: Custom objects are custom database tables that allow you to store information unique to your organization. For example, your organization may want to create a custom object called Projects to store data for your company’s project records.

MK Partners Service: A developer or project manager will create, modify and deploy custom objects to facilitate specific business processes. For example if a project team wants to be able to manage on-site product installs, we can do this by creating project management functionality in Salesforce. This involves the creating of the custom object, modifying of security, creating field, and modifying the final page layout for the users to view.
**AppExchange App Install**

**Salesforce Editions:** Professional, Enterprise, Performance, Developer

**Feature Description:** The AppExchange is a marketplace for purchasing applications created by 3rd parties to extend the functionality and usefulness of Salesforce. Common applications include those for document-generation, electronic signatures, and ecommerce functionality.

**MK Partners Service:** A developer or project manager will install and configure one application into Salesforce. This service includes the actual install process, configuration to completion, setting up of users, and final administration or user training.

---

**Conga Composer - Generate Documents, Presentations and Reports**

One click to proposals, quotes, account plans, contracts and more

★ ★ ★ ★ ★ (425)

Overview Details Reviews Provider

App by Conga

Easily create & deliver documents, presentations & reports in Word, PowerPoint, Excel, HTML, email & PDF forms from any standardized object. Generate proposals, account plans, invoices, quotes, contracts & more. NEW for 2014: Support for Google Drive!

**RELEASED**

11/10/2009

**PRICE**

Starting at $15 USD per user per month

Discounted for Nonprofits

---

**Conga Composer**

Create. Distribute. Automate.

Any Data from Any Object

Your Document, Your Format

Flexible Delivery Options

On Your Schedule

Return to Top
Data Security Setup

Salesforce Editions: Professional, Enterprise, Performance, Developer

Feature Description: Depending on your sharing settings, roles can control the level of visibility that users have into your organization’s data. Users at any given role level can view, edit, and report on all data owned by or shared with users below them in the hierarchy.

MK Partners Service: A project manager or developer will create and modify the role hierarchy and record default sharing so only certain people can see certain records. For example, if a company wants a sales rep to only see their assigned leads, security rules need to be put into place to accomplish that. Salesforce comes out of the box with an open sharing model by default.
Spreadsheet Export

**Salesforce Editions:** Contract, Group, Professional, Enterprise, Performance, Developer

**MK Partners Service:** A data specialist will export data from customer-provided backup files or databases and convert them to spreadsheets. This greatly reduces the effort on the part of the Salesforce customer to provide spreadsheets to MK Partners.
Spreadsheet Import

Salesforce Editions: Contract, Group, Professional, Enterprise, Performance, Developer

MK Partners Service: A project manager or data specialist will import records directly from spreadsheets, typically saved as .csv files. Records are defined as total database entries, such as leads, contacts, accounts, opportunities, notes, tasks, events, etc. For example, one contact record with two note records equals three total records. Or, three contact records on one company record is four total records.
XML Integration

Salesforce Editions: Enterprise, Performance, Developer

Feature Description: Salesforce customers that wish to have Salesforce data reside in external databases, and vice-versa, can opt to have an XML integration created between the two. This typically involves writing Apex in Salesforce to call out to an open web service, or to create a web service in Salesforce where the external system can call to Salesforce. Information can be sent one-way or two-way, just depending on the project requirements. An example of this would be integrating Salesforce with Shopify, an online shopping cart service, so when products are purchased these order end up in Salesforce.

MK Partners Service: A developer will create apex triggers and classes to connect to an existing web service hosted by a 3rd party of platform. This code will facilitate integration between the two systems in a real-time or nightly basis.
Apex Development

**Salesforce Editions:** Enterprise, Performance, Developer

**Feature Description:** Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Force.com platform server in conjunction with calls to the Force.com API. Using syntax that looks like Java and acts like database stored procedures, Apex enables developers to add business logic to most system events, including button clicks, related record updates, and Visualforce pages. Apex code can be initiated by Web service requests and from triggers on objects.

**MK Partners Service:** A developer will create triggers and classes to facilitate business logic in Salesforce. For example, a common trigger can execute to perform lead scoring. Or Apex can be written to perform housekeeping or maintenance procedures on data. Apex is typically created in conjunction with an integration or Visualforce page, and requires a Salesforce sandbox.
Visualforce Development

**Salesforce Editions:** Enterprise, Performance, Developer

**Feature Description:** Visualforce is the component-based user interface framework for the Force.com platform. The framework includes a tag-based markup language, similar to HTML. Each Visualforce tag corresponds to a coarse or fine-grained user interface component, such as a section of a page, or a field. Visualforce boasts about 100 built-in components, and a mechanism whereby developers can create their own components.

**MK Partners Service:** A developer will create Visualforce pages by composing components, HTML, and optional styling elements on the Force.com platform. Just like HTML, Visualforce can integrate with any standard web technology or JavaScript framework to allow for a more animated and rich user interface. Each page is then accessible by a unique URL. When someone accesses a page, the server renders the page. Visualforce can also display data from within Salesforce.
**Dashboard Reports**

**Salesforce Editions:** Professional, Enterprise, Performance, Developer

**Feature Description:** Salesforce can be setup to display reports in a graphical format. For example horizontal and vertical charts, tables, and gauges. All charts need to first have a reports created, and then the dashboard charts created after.

**MK Partners Service:** A project manager will discuss with the team what reports are desired and then create them for feedback and review. Once approved, the project manager will create a dashboard and display these reports in graphical format.
Chatter Setup

**Salesforce Editions:** Contract, Group, Professional, Enterprise, Performance, Developer, Chatter+ License

**Feature Description:** Salesforce Chatter includes the ability to send private messages, create groups, chat, collaborate directly on records, as well as dashboards and reports. Each user has a profile with a "wall" that allows others to post comments, polls, surveys, links, as well as file attachments.

**MK Partners Service:** A project manager will create security, groups, and provide training on best practices. This will include setting up external users to use the free chatter licenses.
Onsite Training

**Salesforce Editions:** Contact, Group, Professional, Enterprise, Performance, Developer

**MK Partners Service:** A project manager or developer will go onsite to perform training. The topics to be covered can range from the basics such as field and report creation, to more complex such as data importing and code creation and deployment.
Salesforce Training

**Salesforce Editions:** Contact, Group, Professional, Enterprise, Performance, Developer

**MK Partners Service:** A project manager or designated, certified trainer will perform multiple training sessions via gotomeeting or other screen-sharing service. These training sessions can be as short as 30 minutes and as long as four hours, depending on the purpose. Most clients choose to have 1 or 2 hour sessions that are recorded for future usage, as new employees and users are brought on board to use Salesforce.
OnDemand Consulting

Salesforce Editions: Contact, Group, Professional, Enterprise, Performance, Developer

MK Partners Service: Often times Salesforce customers are interested in having a block of hours available for general-purpose setup or training. This is the use-case for OnDemand Consulting, whereby clients purchase a pre-determined block of time and then an MK Partners project manager logs time against it. Once the time has been depleted, a new block of hours is purchased. The typical set of purchased hours is 8, and can be used for up to one year.