

# SALESFORCE.COM VIRTUAL ADMINISTRATOR SERVICE

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

Salesforce.com is the world's most popular CRM solution. It's stable, it's reliable, and it's in the cloud.

But SFDC customers still 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 to adding a workflow, some part of your system will need to be updated or reconfigured. And you won't have much advance warning.

Salesforce.com 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 with a yearly commitment - whether you use the service or not**. This can get expensive.

Up to now, your choice has been to sign up for SFDC's Premier Support with Administration, or hire a part-time SFDC administrator. These both mean **ongoing fixed costs**.

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 domain knowledge, expertise, and personal service of a *SalesLogistix Consultant*, instead of a random support person.

## How It Works:

- **Sign up** - Our standard contract involves no prepaid fees or monthly retainer.
- **Set up** - Create a new system administrator user for us in your SFDC system. We'll familiarize ourselves with your system, take notes, and document anything unusual we find. These notes will be stored in your system's *Documents* area. This setup session is typically three chargeable hours.
- **Write Up** - You create an email describing the problem you need solved, or the item you need modified, reconfigured, or turned on. One problem per email. *The more advanced notice you can give us, the more we can do for you*. You'll have an email address for our virtual administrator, and you'll have a phone number in case you need to escalate your problem.
- **Check out** the next page for the items we take care of.
- **Response times** - We are able to offer you this service because of *relaxed* response times: 2 business days, on a 7/12 basis. While these response times are similar to SFDC's *Basic Support*, we offer expertise and system configuration changes that are beyond their *Premium Support*.

## Covered Administrative Tasks

- **User and Login support**
  - Activate or deactivate users
  - Fix locked accounts
- **Roles and Profiles**
  - Manage role hierarchies
  - Manage forecast hierarchies
  - Create & modify profiles
- **Home Page**
  - Update user messages
  - Create useful links and shortcuts
  - Change home page layouts
- **Tabs**
  - Remove / reorder tabs
  - Rename tabs and objects
  - Change 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 and record types
  - Assign page layouts to users
- **Activities and Campaigns**
  - Update standard and custom fields
  - Modify formats and default values
  - Maintain pick lists
  - Modify page layouts and 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 and record types
- **Reports and Dashboards**
  - Create, maintain, and extend
- **Data Management**
  - Preprocess / import Leads or Contacts
  - Cleanse and dedupe data
  - Mass transfer or delete records
  - Run backups
  - Create exports

## Costs

- **For the items included in the list above, virtual system administration is available at \$195 per incident (up to one hour).**
- **For items beyond the list above, for faster turn-around, or for off-hours response, virtual 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 Prentice Hall book on SFDC best practices (available in hard copy and *Kindle* formats).

