

## Professional Edition Upgrade Quick Start

Did you know that the Salesforce.com Summer '16 Release gave all existing Professional Edition (PE) customers an incredible upgrade, for no cost? Professional Edition now includes features that were previously only available with Enterprise Edition. These include:

**Process Builder** - This automates business processes. There are so many ways to use this. Two examples:

- When an Opportunity is won, an email is sent to Accounts Receivable to create an invoice
- A task is created for the Account Owner when a customer contract is within thirty days of expiration

**Record Types** - You can now have different users see TOTALLY different views when looking at the same record. Want your sales team to see different fields than your support team? Want to have a totally different sales process for sales to businesses than for consumers? No problem.

**Profiles** – Defines a user's permission to perform different functions within Salesforce. For instance, you can have users that have only the capability to read, but not create, records. Want some selected users, or just one user, to not be able to see Opportunities? No problem.

**Field Level Security** – Want to hide certain fields, such as credit card numbers, from certain users? Want to make any fields read-only for certain users? Now you can!!

**Sandboxes**- For the first time PE customers get 'Sandboxes', which are copies of your production license to 'play around' with new changes prior to making them available to users. Want to download a new app from the AppExchange and test it before having all users access it? Now you can!

Smallbizsalesforce.com has worked with many PE users. **We are finding that most of them are not only not using these new features, they don't even know they now have them!!**

**We have created a fixed cost way for PE Salesforce.com customers to capitalize on all these new features.**

The key elements of our PE Upgrade Quick Start project:

1. Business discussion - We talk about your business and help you develop a strategy to use these new features. We talk about your users, security needs, how you currently use Salesforce, and how to map all these new features to your business. We are expert at associating business needs with Salesforce.com. We operate by the maxim "Salesforce can do anything. But should it?"
2. Process Builder – We will automate up to two business processes for you. These can automatically send an email, create a task, create a Chatter post, update a record, or create a record.

3. Record Types – We create record types for any object you choose. Additionally, we will use business processes to give you multiple sales or support processes. We will create up to three business processes and three Record Types as part of the base project.
4. Profiles – We will configure Profiles, using the information from our requirements discussion. PE has a limit of two custom Profiles.
5. Field Level Security - We will hide or make any four fields you wish to be invisible, or read-only, for certain Profiles, as part of the base project.
6. Sandboxes – We will create a new sandbox, and show your System Administrator how to access it.
7. Reports and a Dashboard – These new features will drive the need for reporting and a dashboard. We will create up to three reports and one dashboard as part of the base project.

**All these new features are available now in your current Professional Edition. These are the very features that have caused many of our clients to upgrade to Professional Edition, and you now have them. It makes good business sense to use them.**

### Why Use Us

There are many people that can configure Salesforce.com. But they require you to explain your business in the language of Salesforce.com, and you don't know that language. If you knew how to do that, you could probably configure Salesforce.com yourself. We have sales, marketing, operations, and customer support experience. We have done over 200 Salesforce.com configurations for virtually every industry.

### Cost

Our estimates are based on performing the work within the assumptions identified above. If project requirements change, it may result in a change in hours required, and an adjustment in the cost of the project.

Our base Professional Edition Upgrade Quick Start package costs \$1,650. It includes two hours of user and/or System Administrator training. Additional work outside the scope of this base package is billed at \$130/hr.

### If interested, contact:

Jeff Susich  
Office: 513-774-9628  
Mobile: 513-218-7180  
Email: [jsusich@smallbizsalesforce.com](mailto:jsusich@smallbizsalesforce.com)  
[www.smallbizsalesforce.com](http://www.smallbizsalesforce.com)