



# Premier Success Program

All editions of **AgentDealer®** come with our Premiere Success Program. Our success program includes more than just support for answering questions and fixing issues. We are dedicated to your success and helping you to reach your goals faster. In addition to taking on the role of your CRM administrator, we are focused on guiding our users to “High User Adoption, the single most critical factor in obtaining the amazing benefits of what CRM has to offer.

## Success Support:

Here are just some of the things your Premier Success Program includes.

Dedicated Success Manager	Every customer is assigned a dedicated Success Manager. Their job is to help you get the most from your investment. Helping your users to leverage the power of your new CRM and introducing you to new features and capabilities.
Annual System Review	Each year our Success Managers conduct an complete system review to see how your company is using AgentDealer. A comprehensive report is created that outlines the good things and points out areas for improvement.
Support Community	Visit the Support Community where your team can access up to date information on how to get the most from their system. Sign up for webinars, watch best practice videos and search our evergrowing library of articles designed to make everyone a power user. Enage with a live support agent via Live Chat or submit a case if you have a question or are experiencing an with any part of your system.
24-Hour Response	We know you are busy and need support quickly. You will hear from a Live Person within 24-hours of your request for support.
Anything in 30-minutes	To make support easy we have adopted the “Anything in 30-minute” rule for all support request. Put simply, if we can do it in 30-minutes, it is part of the support plan. If what you are requesting will take more time we will quickly send you a quote for professionals services. This does not include issues that are related to problems that have been classified as “broke fix.” These will be escalated for a more comprehensive review and resolution.
Ongoing Consulting	Today's advancements in CRM are moving fast, just like your industry. To stay up to date on the latest capabilities we are here to provide ongoing consulting and sharing of best practices. Just give us a call.

## Set Up & Customization

We can help make sure AgentDealer continues to address the unique challenges of your client base with custom fields, record types, and validation rules.

Users	Create, update and deactivate users
Roles	Create and update roles
Profiles	Create and update profiles - what user can see and do
Custom Fields	Want to capture some data, create a custom field
Page Layouts	Create and update page layouts <sup>(2)</sup>
Record Types	Create and update record types
List Views	Create and update list views - see the data in a different way
Reports	Assist in creation and modification of reports
Dashboards	Assist in creation and modification of dashboards
Validation Rules	Create and modification of data validation rules as needed
Workflow Task/Alerts/Field Updates	Simple workflows for task, alerts and field updates. (Under 30-minutes)
Formulas	Create and modification of formula fields as needed.

## Territory Management

We'll help you to make sure AgentDealer's Territory Manager is set up and running optimally.

Territory Set Up	Territory Set Up based on the way your work. Zip Code, County, Named Accounts
Territory Rules	Assist in building rules that monitor new records added and assign automatically
User Assignments	Add new territory, adjust or reassign as needed

## Data <sup>(1)</sup>

If you are migrating with existing data, we will help facilitate a seamless transfer so you can get back to selling without missing a beat.

Mass Transfer Records	Assist with moving stuff around
Mass Delete Records	Time to do a little clean-up?
Mass Create Records	Just got your hands on a new Prospect List?
Mass Update Records	Need to mass update existing records?

# Security

We take security very seriously and want to ensure that your team is set up with a structure that respects proprietary information while empowering employees to do more than ever.

Sharing Rules	Share records with overlays
Field Accessibility	Give visibility to the right people
Password/MFA Policies	Manage Password Policies and MFA (multi-factor authentication)
Session Settings	Secure your data with session settings
IP Ranges	Keep your data from getting out of your environment

Support Administrative Services excludes the initial implementation of your system, data migrations, implementations, data management or manipulation (de-duping, merging, cleansing), 3rd party app installs, uninstalls, extensive customization beyond the 30-minute rule, and custom code.

- (1) The customer must provide data in an upload-ready condition as specified by AgentDealer. Contact support for additional information.
- (2) Excludes custom code



## AgentDealer®

YOUR DIGITAL TRANSFORMATION HUB

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Contact us today to see for yourself how **AgentDealer®**, a modern CRM, can change your business.

