

TopLine Results Corporation is the premier Dynamics 365 hosting and consulting company in North America. Our staff of experienced and certified professionals across multiple states ensures your company the best and most reliable Dynamics 365 experience available anywhere. With affordable service packages — including our comprehensive Ultimate Service Plan — we can meet every company's budget and wish list!

Jump Start Dynamics 365

Premium Startup*: \$7,500

- Needs analysis and project review: up to 4-hours
- Security profiles: up to 5 profiles
- Workflow automation: up to 10 basic workflows
- Templates: up to 5 Word or email templates
- Set up Leads, Contacts, Accounts & Opportunities: up to 12 custom fields per form
- Scripting: up to 2 hours of basic scripting
- Product list configuration: up to 10 products
- Dashboards: up to 3 dashboards
- One CSV file import for contacts/accounts
- Custom training: new user CRM introductory training

Service Plans are the Key to Success

Essential Service Plan \$25/user per month

5-user minimum

- Phone, email and online support
- Support log report
- New user configuration
- Security role assignment
- Outlook integration setup
- Deduplication views (monthly)
- Dynamics Mobile App configuration and support
- System view creation
- Site map configuration
- TopLine CRM video series training
- TopLine Getting Started guide
- Monthly instructor-led training

Performance Service Plan \$60/user per month

10-user minimum

- Field changes
- Form customizations
- Process bar development
- Workflow automation
- Business rules configuration
- Custom dashboards
- Advanced queries
- Word template coaching
- Outlook email template coaching
- Mail merge coaching

Essential Plan included

Performance+ Service Plan \$85/user per month

10-user minimum

- Database design meetings
- Periodic database reviews
- System upgrade analysis
- Project management
- Administrator training
- Web-to-lead setup
- Development documentation
- Quarterly marketing strategy sessions
- Quarterly marketing campaign coaching sessions
- Email integration setup
- Email template coaching and setup

Startup Plan included

Essential Plan included

Performance Plan included

Note: Please request a formal proposal for complete details and features.

* The following services are not included in the startup plan and may require 3rd party solutions and/or upgrades to the CRM edition: data migration, conversions and imports, marketing campaign setup, lead management setup, website integrations, ERP integrations, custom entity development, customer service development, custom reports, documentation/custom videos, portals, custom apps, third party add-on integration, quote integration and services included in TopLine Essential Service Plan. Startup plan deliverables must be provided within the first 90 days.

Services	Essential Plan \$25/user per month	Performance Plan \$60/user per month	Performance+ Plan \$85/user per month
Phone, email & online support	✓	✓	✓
Outlook integration setup	✓	✓	✓
New user configuration	✓	✓	✓
Profile and permissions setup	✓	✓	✓
Mobile App configuration and support	✓	✓	✓
Deduplication views	✓	✓	✓
System view creation	✓	✓	✓
Site map configuration	✓	✓	✓
Support log and report	✓	✓	✓
New user training (monthly)	✓	✓	✓
Training video library	✓	✓	✓
Field and form customizations		✓	✓
Process bar development		✓	✓
Workflow automation		✓	✓
Business rules configuration		✓	✓
Custom dashboards		✓	✓
Advanced queries		✓	✓
Word template coaching		✓	✓
Outlook email template coaching		✓	✓
One CSV import for contacts/accounts		✓	✓
Database design meetings			✓
Periodic database reviews			✓
System upgrade analysis			✓
Project management			✓
Administrator training (2 sessions/year)			✓
Development documentation			✓
Quarterly marketing strategy sessions			✓
Marketing integration setup			✓
Quarterly marketing campaign coaching			✓
Email template coaching			✓
Web-to-lead setup			✓
Premium Startup (\$7,500 value)			✓

*Please request a formal proposal for complete details. Pricing is per-user, per-month, quarterly payments required. Development services based on main entities: account, contact, opportunities leads and cases. Dynamics 365 Team users service plan starting at \$25 per user per month.

Notes: (1) Consulting services not included in your package will be quoted separately. (2) TopLine Results provides the necessary knowledge to build a campaign, however, it is the customer's responsibility to build their own lists and templates and execute their campaign. (3) Third party tools are not included and will require an additional purchase. (4) Team users are required to purchase the essential membership plan. (5) Service plans apply to the Dynamics 365 Sales and Customer Service Apps only.