

## ◀ What services are included?

# S.M.A.R.T. Managed Services

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## In-Scope Items

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*"In-scope" items shall be defined as any general use configuration or training requests that are native to your CRM. Such items would be completed directly within your CRM (natively) and would not require any software development efforts, advanced technical analysis, data manipulation, technical documentation, or 3rd party plugins/integrations.*

### **Common in-scope items include, but are not limited to:**

- Managing users/roles/profiles/permissions
- Managing objects/fields
- Creating custom reports/dashboards
- Creating custom objects/relationships
- Creating custom workflows/process automations
- Providing CRM training
- Providing CRM best practices

## Out-of-Scope Items

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*"Out-of-scope" items shall be defined as anything that is not native to your CRM or not considered general use, which would include things like software development efforts, advanced technical analysis, data manipulation, technical documentation, or 3rd party plugins/integrations. Such items may be requested by using your 10 development hours each month. Each item's level of effort would need to be estimated and approved by you in a separate SOW (statement of work) before any work begins.*

### **Common out-of-scope items include, but are not limited to:**

- Custom coding of any kind.  
*Examples include, but are not limited to Elasticsearch, APEX, Visualforce, JavaScript, or HTML (including HTML for email templates).*
- Data management or manipulation.  
*Examples include, but are not limited to data uploads, data deduplication, data merging, data cleansing, transferring data from one organization/object to another, or manipulating spreadsheets.*

## Common out-of-scope items (continued):

- Installing, uninstalling or configuring non-native applications.  
*Examples include, but are not limited to any 3rd party apps from AppExchange or Sugar Market.*
- Installing, uninstalling or configuring non-CRM products  
*Examples include, but are not limited to any other services or technologies outside of your CRM, such as external databases, computer networks, or communications systems.*
- Metadata analysis  
*Examples include, but are not limited to current state analysis of your organization (e.g. field usage analysis, user accessibility to fields/page layouts/permissions, determining which fields are used in report criteria), importing or updating documents and attachments, creating or modifying custom CRM buttons or links.*
- Technical documentation  
*Examples include, but are not limited to creating administrative or technical guides, documenting use cases or user stories, creating flowcharts or system diagrams.*
- Managing or configuring CRM upgrades/downgrades or security patches.

*The definitions and examples shared above (regarding in-scope and out-of-scope items) are subject to change and are at the sole discretion of MasterSolve.*

*Any additional hours needed for out-of-scope items beyond the initial 10 development hours each month would be billable at your standard rate. For example, if you requested new software features to be developed and that project required 20 hours to complete, you would pay for the additional 10 hours since the first 10 hours were already included.*

