Get Started with Pro Suite.

Access powerful tools to help you grow smarter and faster.

Use our step-by-step checklist with linked resources to confidently start using Pro Suite. Activate key features across sales, service, marketing, and commerce quickly. Start today and make the most of everything Pro Suite has to offer.

Lay the Groundwork

	Pro Suite		Sales		Service
	Marketing		Commerce		Data Cloud

- [ ] **Connect your email** by linking your Gmail or Outlook account — Pro Suite
- [ ] **Sync your calendar** to manage your schedule effectively — Pro Suite
- [ ] **Invite your team to Pro Suite** via email for seamless collaboration — Pro Suite
- [ ] **Update your company information** in Advanced Setup — Pro Suite
- [ ] **Activate marketing features** to unlock powerful marketing tools — Marketing
- [ ] **Enable Pay Now to send payment links** for closed deals — Commerce
- [ ] **Link your customer service email** so customers can submit support cases — Service
- [ ] **Turn on Salesforce Channels** to collaborate with your team in Pro Suite and Slack — Slack

Tailor the Basics

- [ ] **Organize your apps** by reordering and starring your favorites — Pro Suite
- [ ] **Access the Guidance Center** for built-in help and tips — Pro Suite
- [ ] **Personalize your homepage** to align with your workflow — Pro Suite
- [ ] **Add custom fields** to capture key business data — Pro Suite
- [ ] **Explore analytics** with ready-to-use reports and dashboards — Pro Suite

Make Customizations

- [ ] **Create custom objects** or rename objects to track unique business needs and processes
- [ ] **Connect third-party apps** through the AppExchange
- [ ] **Automate workflows** using Salesforce Flows
- [ ] **Improve email deliverability** by setting up DKIM (DomainKeys Identified Mail)
- [ ] **Launch a landing page** to capture interest
- [ ] **Configure messaging in-app and web** to connect with your customers in real time
- [ ] **Create knowledge articles** and quick text to answer common customer questions
- [ ] **Route cases** to the right subject matter expert with omni-channel routing

Keep the Momentum Going

- [ ] **Launch your first email campaign** to reach your audience
- [ ] **Create your first opportunity** to start managing your pipeline
- [ ] **Send a payment link** for a closed opportunity
- [ ] **Log into messaging in-app and web** to manage customer service interactions

Ask your Account Executive about Premier Success