Concierge Setup

What to expect when setting up Chili Piper Concierge with Salesforce

Who to involve from your team:

- **Marketing Ops** - to clone an existing form for testing.
- **Web Dev** - to install the Concierge javascript snippet.
- **CRM Admin** - to create custom CRM fields. (if applicable)

Pre-Kickoff

Gain access to your Chili Hub to complete your Kickoff Checklist (30 min)

1. Tell us about your team and goals
2. Create your Chili Piper instance
3. Review Chili Piper 101
4. Copy your webpage and form for testing

Kickoff

Introduction to Chili Piper, MVP of Concierge (45 min)

1. Create a test Queue without any rules
2. Map your form fields to Chili Piper
3. Setup your Router
4. Test the Concierge javascript snippet
5. Assign Licenses

Build

Review Queue Rules, Templates, Test Concierge, Go Live Prep (50 min)

1. Create Queues based on your desired routing logic
2. Customize your Meeting Template and Reminders
3. Assign User Licenses
4. Brand your Concierge pop-up with Custom CSS
5. Add Salesforce Fields for tracking and reporting (if applicable)

Launch

Get your team up and running using Chili Piper (45 min)

Chili Piper Concierge User Guide

Please note: every implementation is different - the above is a general guide but may be altered based on your team's tech stack and goals.