

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

KICKOFF

BUILD

LAUNCH

Gain access to Chili Piper and complete your self-guided initial onboarding.

Meet your onboarding team and dive into Chili Piper.

Together with your onboarding team review Queue Rules, Templates, Test Concierge, Go Live Prep

Launch Chili Piper and let the good times roll

1. [Create your Chili Piper instance.](#)
2. [Walk through self-guided onboarding in Chili Piper to understand the basics.](#)
3. Copy your webform for testing.

1. [Create Queues based on your desired routing logic.](#)
2. [Customize your Meeting Template and Reminders.](#)
3. [Assign User Licenses.](#)

1. [Brand your Concierge pop-up with Custom-CSS.](#)
2. [Add Salesforce Fields for tracking and reporting \(if applicable\)](#)

1. [Chili Piper Concierge User Guide.](#)

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

