

# Managing Data made easier & focus on getting more leads

## Company Profile

Client	ATD Solution
Location	Singapore / Malaysia / Hong Kong
Employees	60+
Industry	Training Institute
Solutions / Edition	Sales Cloud, Partner Community, Pardot / Enterprise
AppExchange	SalesforceIQ Inbox
Go-live date	16 <sup>th</sup> January 2017



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## Company Profile

Founded in 2009 by a group of highly skilled and passionate IT professionals, ATD is a world-class leading provider of business IT architecture solutions. As the leading business IT architecture firm in Asia Pacific, they are dedicated in changing the way companies in the region use and adopt IT through their specialised services, which includes extensive business IT architecture training, consultancy services, as well as hands-on coaching and mentoring.

To date, ATD has served over 1,000+ clients in Australia, Indonesia, Singapore, Malaysia, Taiwan, Hong Kong, Macau, China, Japan and India. Their strength lies in the ability to combine expertise in business IT architecture best practices, software compliance, process methodology, advanced systems and method design together with consulting and training to develop & deliver specialised IT programs for professionals in the industry.

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## ATD's Major Challenge

1. Unable to share accounts & opportunities based on various criterions in their existing CRM system (Sugar). Unable to create multiple quotation in their current CRM.
2. On the Student (Contact) detailed page, unable to see courses that were completed by the student and date of completion.
3. Sales user should be given access for discounts; however whenever the discount % is above the allowed limit, it should channel for approval from the management team. (Note: In opportunity, multiple courses can be added, but approval to be obtained only for courses that exceeds the discount and other courses shouldn't go through this approval).
4. Roll-up amount on Enrolment for each courses created from Multiple enrolment opportunity.
5. Unable to create multiple dashboard and create many reports in their existing Sugar CRM

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## Solution(s) by TechMatrix

- TechMatrix helped in addressing all the issues by creating custom objects, custom labels, triggers, flows, calling the flow in process builder, Record types, Approval Process, Validation rules etc.
- Public Groups and sharing settings were created to share records between different roles.
- Trigger was used to update the contacts whoever enrolled and completed the course enrolled, along with the date of enrollment.
- The process builder was used to meet the criteria for approval process and trigger for approval. A flow was created to do the rollup of individual enrolment fee.
- Different Reports and Dashboard were created based on Role hierarchy

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## End-Result that benefitted ATD Solution

- Sales users were able to create multiple quotation and were relieved from manual work of approval process. This has reduced the workload and made them more efficient in managing their time.
- All Department heads, Management users and Country heads were able to see reports and dashboards based on their hierarchy roles and sharing settings. They were able to take decisions quickly and act on any opportunities that are being lost.
- Due to Roles and Sharing settings, data were secure and management team were able to focus more on lead management and opportunities.

# Solution Detail

Competitors of Salesforce engaged in sales cycle:	NA
Previous technology replaced by Salesforce:	Sugar CRM
Salesforce products deployed:	Sales Cloud, Chatter. Pardot & Partner Community
Customer Business Model (B2B, B2C, or Both)	B2B & B2C
Salesforce Product features:	Salesforce1
If using Service Cloud, list use case (e.g. customer support, call center, field service, telesales, etc.)	NA
Integrations	NA
AppExchange Apps/Partners	SalesforceIQ Inbox
Solution 'Go Live' date:	16 <sup>th</sup> January 2017

# Screenshots of app

**atd solution®**  
architecture • technology • delivery

Search... Search

TMC Consultant Setup Help & Training **ATD CRM**

Home Campaigns Leads Accounts Contacts **Opportunities** Courses Enrolments Enroled Contact Reports Dashboards +

Enquiry  
**Add Courses**

Save Cancel

**COURSE 1**

Course Infrastructure Architecture

Quantity 1

+ Discount Type Test Dis

**COURSE 2**

Course IT Architecture Bootcamp

Quantity 1

+ Discount Type Exclude

Add Course

Save Cancel

Enrolment  
**E-00414**

Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Back to List: Users

Fee/Discounts [2] | Enroled Contact [1]

**Enrolment Detail** Edit

Enrolment ID	E-00414	Enrolment Stage	Tentative
Opportunity	Test_22Mar2017	Owner	TMC Consultant [Change]
Course	Mastering Enterprise Architecture Skill Sets for Successful EA Adoption	Enrolment Date	
Account Name	Test TMC Consultant	Class Start Date	
Quantity	1	Status	
Total Enroled Contact	1	Total Amount	\$0.00

▼ System Information

Created By TMC Consultant 30/03/2017 16:28 Last Modified By TMC Consultant 30/03/2017 16:32

Edit

**Fee/Discounts** Fee/Discounts Help

Action	Course	Quantity	Sales Price	Total Price
Edit   Del	Mastering Enterprise Architecture Skill Sets for Successful EA Adoption	1.00	\$1,000.00	\$1,000.00
Edit   Del	Test Discount	1.00	(\$1,000.00)	(\$1,000.00)

**Enroled Contact** New Enroled Contact Enroled Contact Help

Action	Enroled Contact ID	Contact	Enroled Contact Email	Enroled Contact Account
Edit   Del	EC-0447	Srinivasan Test	srinivasan.ganesan@gmail.com	TMC

# Screenshots of app

Process Builder - Set Name in Task (Process)

Expand AllCollapse All

View All ProcessesCloneView PropertiesDeactivateRead Only ⓘ

START

Task

NA

TRUE

IMMEDIATE ACTIONS

Set Name in Task St...

STOP

FALSE

+ Add Criteria

TRUE

IMMEDIATE ACTIONS

+ Add Action

STOP

FALSE

Launch a Flow

Action Name ⓘ  
Set Name in Task Step

Flow ⓘ  
Set Name in Task Step

Set Flow Variable  
TaskId  
Type  
Id

Save

Marketing

Prospects

Reports

Admin

salesforce pardot

Search

?

⚙

👤

Prospects Created

Date Range (Based on 12am EDT):  
This Month ▾

20

15

10

5

0

Mar 3

Mar 6

Mar 9

Mar 12

Mar 15

Mar 18

Mar 21

Mar 24

Mar 27

Mar 30

Prospects Created

166

Conversions

24

Opportunities Created

12

All Prospects

6,557

Active Prospects for Review

NAME	COMPANY
Hanin Hanin 🌱	Telekom Malaysia Berhad
Mohd Mazmee Wahab 🌱	PETRONAS ICT Sdn Bhd
Dr. Jasber Kaur Sidhu 🌱	Universiti Teknologi Mar...

Identified Companies

COMPANY	LOCATION
TM Net	🌐 Kuala Lumpur, Kuala Lumpur, Malaysia
TM Net	🌐 Kuala Lumpur, Kuala Lumpur, Malaysia
EMC Corporation	🌐 Singapore, Singapore



# Sharing Guidelines

***These questions are required in order for your story submission to be accepted. Please answer these questions to the best of your ability.***

***We will not contact the customer without reaching out to you first.***

## SHARING USE CASE/SCENARIO:

Can salesforce.com AEs share this story and overview slide in sales settings?	Yes
Can salesforce.com AEs mention the customer name in sales settings?	Yes
Is this customer willing to act as a reference customer for prospects?	Yes
Would the customer be willing to speak at Dreamforce or other events?	No

## PARTNER INFORMATION

Name of reference approver:	Dharamvir
Title of reference approver:	Managing Director
Email of reference approver:	Dharamvir@techmatrixconsulting.com