

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 th 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 th January 2017

Screenshots of app

The image displays two screenshots of the atd solution® application interface.

Left Screenshot: Add Courses

This screen shows the 'Add Courses' form. It has two main sections: 'COURSE 1' and 'COURSE 2'. Each section contains a 'Course' dropdown (set to 'Infrastructure Architecture' and 'IT Architecture Bootcamp' respectively), a 'Quantity' input field (set to '1' for both), and a 'Discount Type' dropdown (set to 'Test Dis' and 'Exclude' respectively). Below these sections is a 'Total Fee' section. At the bottom are 'Save' and 'Cancel' buttons.

Right Screenshot: Enrolment Detail

This screen shows the details for an enrolment with ID E-00414. The 'Enrolment Detail' section includes fields for Enrolment ID (E-00414), Opportunity (Test_22Mar2017), Course (Mastering Enterprise Architecture Skill Sets for Successful EA Adoption), Account Name (Test TMC Consultant), Quantity (1), and Total Enrolled Contact (1). The 'Enrolment Stage' is Tentative, and the 'Owner' is TMC Consultant [Change]. The 'Fee/Discounts' section shows a single entry for 'Mastering Enterprise Architecture Skill Sets for Successful EA Adoption' with a quantity of 1 and a total price of \$1,000.00. The 'Enroled Contact' section shows one contact named Srinivasan Test with the email address srinivasan.ganesan@gmail.com. The 'Enrolment' screen also includes links for 'Show Feed', 'Back to List: Users', 'Fee/Discounts [2]', and 'Enroled Contact [1]'.

Screenshots of app

Process Builder - Set Name in Task (Process)

View All Processes | Clone | View Properties | **Deactivate** | Read Only

Launch a Flow

Action Name* Set Name in Task Step

Flow* Set Name in Task Step

Marketing Prospects Reports Admin

Prospects Created

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

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

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graph TD; START([START]) --> Task[Task]; Task --> NA{NA}; NA -- TRUE --> SetName[Set Name in Task Step]; SetName --> STOP1([STOP]); NA -- FALSE --> Criteria{+ Add Criteria}; Criteria -- TRUE --> SetName; SetName --> STOP1; Criteria -- FALSE --> STOP2([STOP]);
```

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