### **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	







#### **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.





### **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





#### 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





#### **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 ale to take decisions quickly and act on any opportunities that are being lost.
- Due tor Roles and Sharing settings, data were secure and management team were able to focus more on lead management and opportunities.





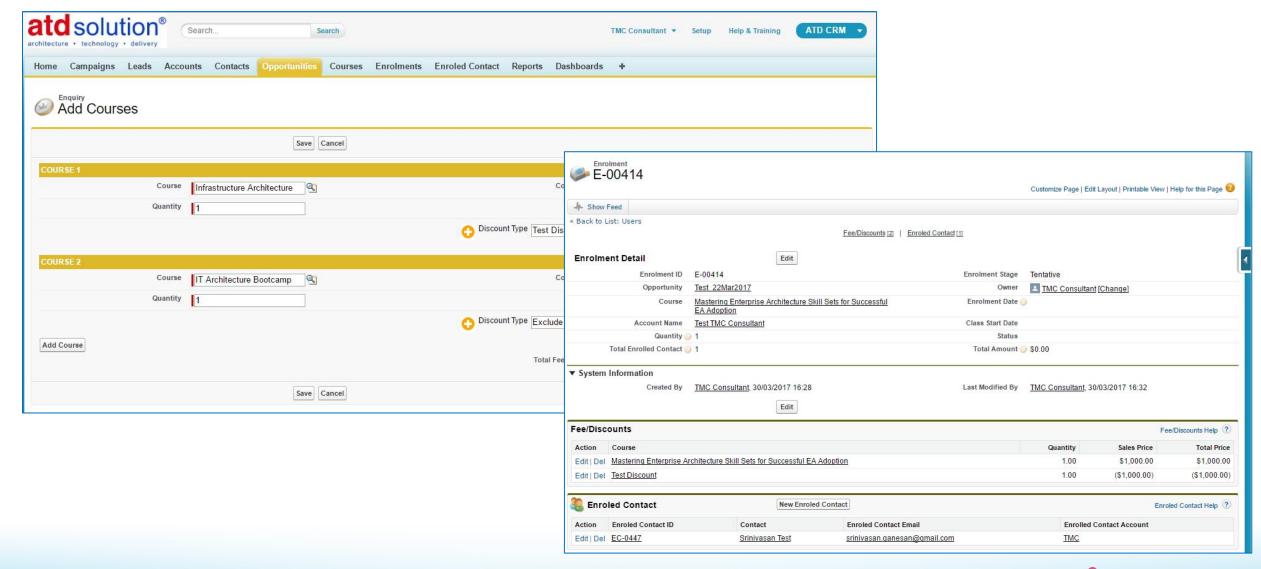
## **Solution Detail**

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	





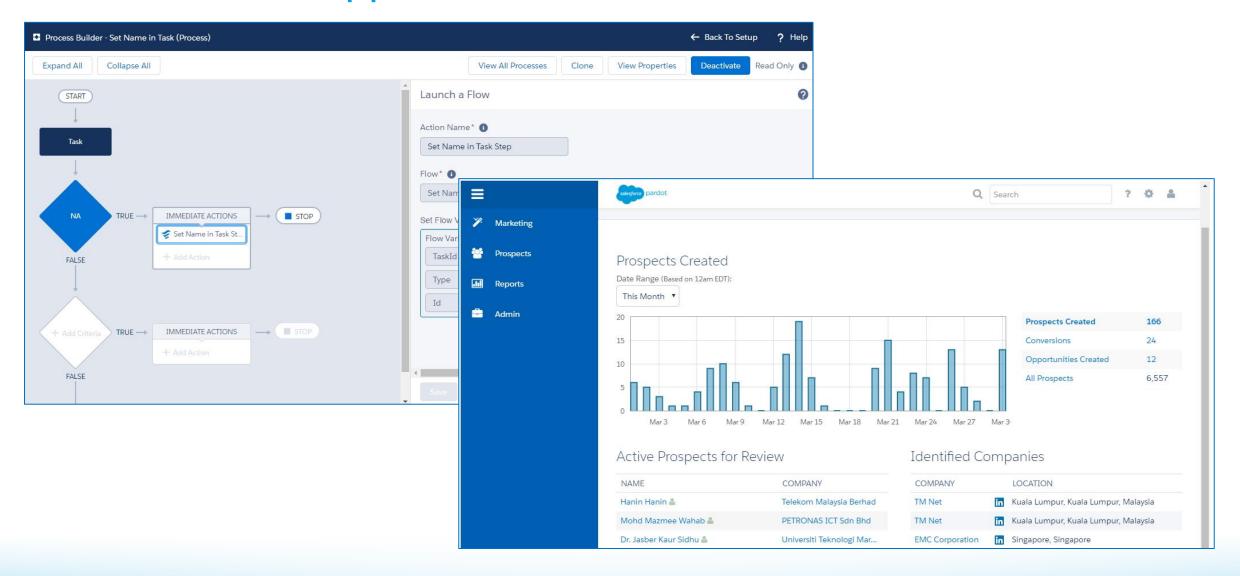
### Screenshots of app







### Screenshots of app







### **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:	pprover: Dharamvir@techmatrixconsulting.com		



