

SALES CLOUD DOCUMENT MANAGEMENT FOR SALES OPERATIONS

BEST PRACTICES PLAYBOOK



DOCUMENT MANAGEMENT IN THE 4TH INDUSTRIAL REVOLUTION

Why Use Sales Cloud?



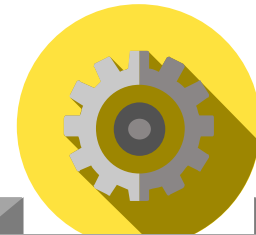
Business Support

- Enable sales support inquiries for opportunities
- Use automation features to create and assign sales support tasks



Engagement & Productivity

- Manage resources and their times directly from salesforce
- Simplify sales support through automating support inquiries and proposal generation



Process Management

- Establish support statuses for your support processes
- Set up approval processes to enforce your support processes
- Automatically escalate based on the criteria you define
- Monitor your overall sales support activities through reports and dashboards

What Does Sales Cloud Bring?



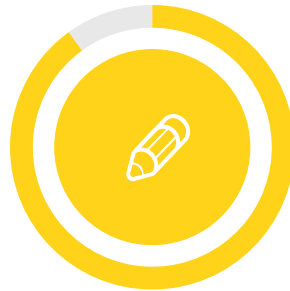
A set of tools to drive sales operations excellence in enterprises

Document Management Challenges on Sales Cloud



Lack of Document Structure

If documents are stored in Salesforce, they cannot be stored in an organized manner.



Difficulty on Accessing Documents

If not stored in Salesforce, documents are hard to access



Limits on Sending Large Files

There are salesforce governing limits on sending emails with attachments (25MB is the limit)



Inability to Retire Old Case Files

There is no mechanism on salesforce to safely, securely and cost effectively retire old files

How Can S-Drive Help?



Visibility

With easy reach to all files related to opportunities on Salesforce, enterprises will have better understanding of their customer needs



Accessibility

Sales support teams can upload and access files critical to run business from anywhere and at anytime.



Sharing

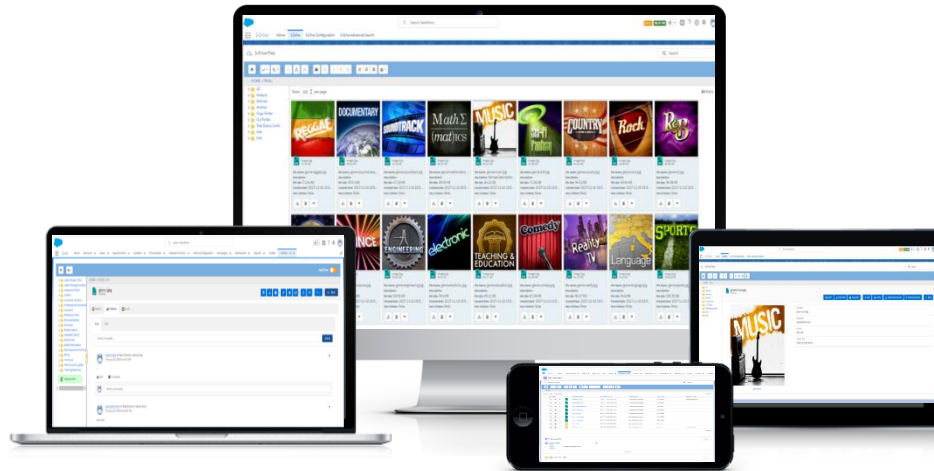
Users having access to files can easily share without having to worry about email size limitations of salesforce



Archiving

Enterprises can archive files based on their retention policy in a cost-effective manner

Where to Test Drive S-Drive?



Highest Rated

With its 4.9 Score, S-Drive is the most beloved Document Management app on AppExchange



Customizable

The most flexible platform to meet your needs on document management.



Simple to Setup

The easiest to setup among document management apps



Support

One of the most recognized customer support

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