

# SALES CLOUD DOCUMENT MANAGEMENT FOR SALES TEAMS

BEST PRACTICES PLAYBOOK



**DOCUMENT MANAGEMENT IN THE 4<sup>TH</sup> INDUSTRIAL REVOLUTION**

# Why Use Sales Cloud?



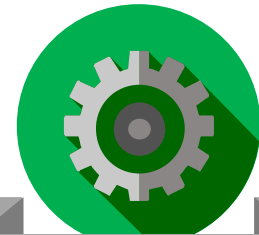
## Opportunity Forecasting

- Enable funnel management and forecasting on orders
- Be able to track the progress from lead to opportunity and then all the way to collecting cash



## Engagement & Productivity

- Sales teams can collaborate about opportunities, accounts, competitors and leads in one place
- Sales people only needs to fill in information once and this information will be visible across different teams



## Process Management

- The entire sales organization will be able to use same sales terminologies when tracking business
- Monitor overall sales activities through reports and dashboards

# What Does Sales Cloud Bring?



A set of tools to drive sales excellence in enterprises

# Document Management Challenges on Sales Cloud



## Storing Customer-facing Documents

Sales teams do not have a place to store their customer facing documents inside Salesforce.com



## Creating similar documents

Sales teams are required to create similar documents to initiate different internal processes



## 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 customers, sales teams will be able to use Salesforce as the central repository for files



## Accessibility

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



## Sharing

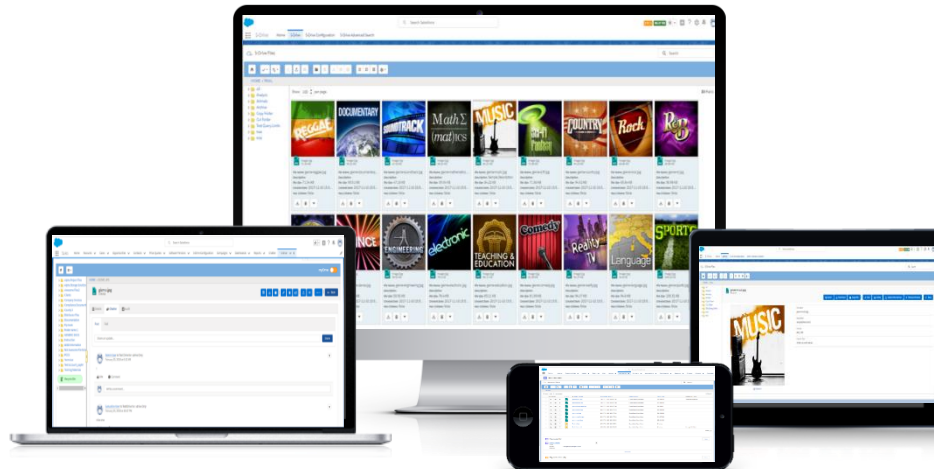
Users having access to files can easily share without having to worry about email size limitations of salesforce



## Archiving

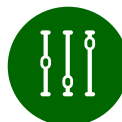
Enterprises can archive files based on their retention policy in a cost-effective manner

# 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

[www.sdriveapp.com](http://www.sdriveapp.com)

© 2018 CyanGate  
All Rights Reserved.





To learn more,  
please visit

<https://get.sdriveapp.com>