



CloudWharf Team

Management:

- Jupp **Stoepetie**
- Konstantin **Teplinskiy**

SF Developers & Consultants:

- Employees: **9**

SF Certifications (more in planning)



Official **SF Consulting** Partner

- Rollout and optimization of Salesforce processes (Marketing, HR and Sales)
- Data quality protection. Mass data updates. Data migration.
- Analysis and maintenance of existing Salesforce cloud solutions.
- Deep and secure integrations between different business systems.
- Salesforce Trainings

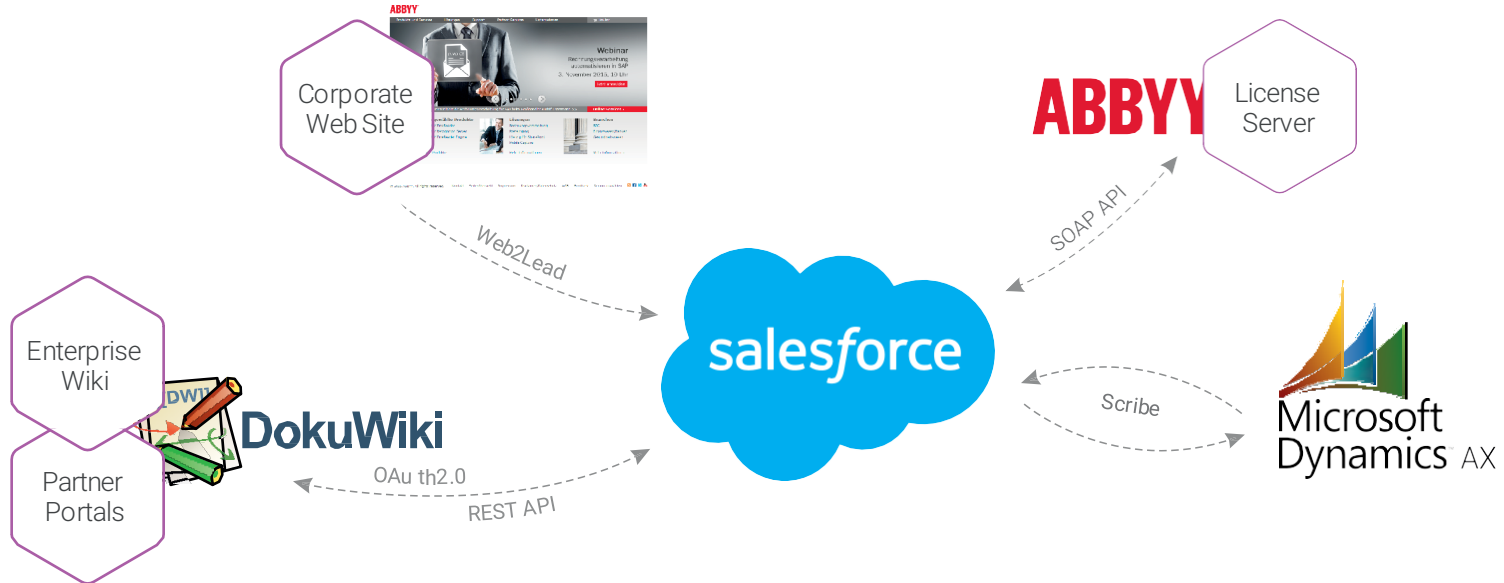


Data Quality

- Precise database structure
- Data validation
- Data analysis for reports and dashboards
- Monitoring Services (automatic control functions)
 - ✓ Weekly notifications to users concerning pending tasks
 - ✓ Account, Lead and Contact deduplication



Business Systems at ABBYY EU



- Wave (Analytics Cloud)
- Sales Cloud
- HR Applications
- Community Cloud
- Pardot (Marketing autom).
- Customer Portal
- Integrations
- Service Cloud
- Workflows & Approvals



ISV Partner

Sales and Marketing



Lead
Deduplication



Trial License
Delivery



Opportunity
Management



Price
Calculator &
Quotes



Licences &
Invoices
Generation

HR Processes



Management
by Objectives



Out of Office



OnBoarding

Services



Professional
Services



Time Tracking



Training
Management



Sales & Marketing: Data Deduplication

- Several Leads with the same email are not allowed, thus all new Leads with this email update the existing Lead
- Add information in the description field about the deduplicated Leads in the current Lead
- Owner receives an email about the updated Lead
- Existing field values can be updated depending on the new field values
- Change the Lead owner, if the current owner is an inactive user



Sales: Trial Process



Your ABBYY Trial License

Dear Mr. Aylov,

Attached your requested Trial License for FineReader Engine 11 .
You can download the latest version here:

Product	Serial Number	Download Link	Download Info
FineReader Engine 11	PCDC-1234-5678-9101-2345-6789	Link	500 pages, 30 days

If you have any questions on the product, licensing or pricing, just let me know. Me or a colleague of mine might contact you in the next few days anyway.




Best Regards,

System Admin

ABBYY Europe GmbH

©ABBYY Europe GmbH. You have received this email because you completed the ABBYY Europe trial license request process. This mail was sent to you via Salesforce by:
ABBYY Europe GmbH, Eisenhelmstr. 49, D-80607 Munich, Phone +49 89 5111 59-0
Managing Director: Jupp Stoepette - Registered Amtsgericht Munich HRB 131467

FineReader SDKs

	Product Name	Description
<input checked="" type="radio"/>	 FineReader Engine 11 Windows Trial	FineReader E
<input type="radio"/>	 FineReader Engine 11 Windows with Receipt Recognition Trial	60 days, 10K
<input type="radio"/>	 FineReader Engine 11 Linux Trial	FineReader Engine Linux 11

Thank you Mr. Georgi Aylov for requesting a free evaluation licence for FineReader Engine 11 Windows.

Please answer each question, so that the ABBYY Team can get a better idea what you plan to develop with our SDKs.

Once the form is filled in properly, the terms and conditions are accepted and submitted, you will receive your **personal trial licence and the download information** for a **fully functional SDK**. The trial licences are limited by time and volume. Within the trial period ABBYY Europe provides **free technical support** to allow you to test FineReader Engine 11 Windows in real working conditions.

1. What type of project do you need the OCR SDK for?

- Onetime solution/project
 Integration in a product/solution

If other, please specify:

2. Where do you plan to sell your product/solution?

- Austria, Benelux, Germany, France, Iberia, Italy, Ireland, Nordic, Switzerland, UK
 Sales within the European Union

If other, please specify regions/continents:

3. How do you plan to sell your product/solution?

- Direct Sales
 Channel Sales
 Direct & Channel Sales
 Rollout Online/SaaS

4. What are the main tasks/scenarios with OCR within your product/solution?

- Full text OCR = Obtain the entire text information of a scanned document/page
 Data Extraction = Extract only selected text elements of parts of the page
 Document Conversion = Convert a scanned document/page into an editable/searchable format
 Document Classification = Use the text information to classify a document to a predefined class
 ICR / Forms Processing = Extract hand printed text from scanned forms
 Business Card Reading
 Barcode Recognition

If other, please specify:

https://wiki.abbyy.eu.com/product/fre_linux_11/s...

Sales: Opportunity Management

- Prospect
- Qualify
- Develop
- Solution
- Confirmation
- Quotation
- Negotiation
- Proof
- Secure
- Closed Won
- Closed Lost

Probability (%) Explanation for stage Quotation

Partner opportunity

Questions from stage **Qualify**

Dialog with decision maker

Customer has defined budget

Timeline known

Customer has a project

Questions from stage **Solution**

Solution concept developed and delivered

Questions from stage **Develop**

Demo took place

Onsite meeting took place

Questions from stage **Confirmation**

Customer has requested an offer or specific pricing information

Please upload quotation:

Notes

Sales: Price Calculator & Quotes

Generate quotes via point & click in seconds

Quote
Test Opportunity's Quote 2016-06-14 07:10:55

Quote Detail

Quote Number	0000037	Expiration Date	30.06.2016
Quote Name	Test Opportunity's Quote 2016-06-14 07:10:55	Syncing	
Opportunity Name	Test Opportunity	Status	PDF Generated
Account Name	IB8T	Description	
Calculator Product	FileReader_Engine_11 (Win)	Contract	CTR-812668
Quote version	14,00		
Previous Quote			

▼ Totals

Subtotal	EUR 8,640.00	Tax	
Discount	0,00%	Shipping and Handling	
Total Price	EUR 8,640.00	Grand Total	EUR 8,640.00

▼ Prepared For

Contact Name	Gestel Johnson	Phone	
Email	gjohn@cloudwharf.com	Fax	

▼ Address Information

Bill To Name		Ship To Name	
Bill To		Ship To	

▼ System Information

Created By	European Operations, 14.06.2016 09:10	Last Modified By	European Operations, 14.06.2016 09:13
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Quote Line Items (Tech Price Book - UK)

Action	Product	Line Item Description	Sales Price	Quantity	Subtotal	Discount	
Edit Del	FRE 11 RTL	100,000 Pages, non renewable (TPC)	EUR 150,00	30,00	EUR 4,500,00	0,00%	EUR 4,500,00
Edit Del	FRE 11 RTL_Add000	Arabic OCR	EUR 45,00	30,00	EUR 1,350,00	0,00%	EUR 1,350,00
Edit Del	FRE 11 RTL_Add000	Classification	EUR 45,00	30,00	EUR 1,350,00	0,00%	EUR 1,350,00
Edit Del	FRE 11 RTL_SMJJA	01.07.2016 - 30.06.2017, 12 months	EUR 48,00	30,00	EUR 1,440,00	0,00%	EUR 1,440,00

Quote PDFs

Action	Name	Discount	Grand Total	
Email Del View	Test Opportunity's Quote 2016-06-14 07:10:55_V1.pdf	0,00%	EUR 8,640,00	European Operations, 14.06.2016

CPQ: Test Opportunity

Product: FRE 11 RTL (non-renewable (TPC))

Base Price (100,000 Pages, non renewable (TPC)) Total: 4,500 EUR

Quantity (Pages): 10000 Time Frame: non-renewable (TPC)

Add-Ons (2 selected) Total: 2,700 EUR

NAME	CATEGORY	PRICE MODEL (EUR)	PRICE (EUR)
<input type="checkbox"/> Full Export to PDF (image only, search, PDF, PDF/A (1-3), MRC PDFs)	Export	30 % (150)	45
<input checked="" type="checkbox"/> Arabic OCR	Language	30 % (150)	45
<input type="checkbox"/> GUR OCR	Language	30 % (150)	45
<input type="checkbox"/> Hebrew OCR	Language	30 % (150)	45
<input type="checkbox"/> Thai OCR	Language	30 % (150)	45
<input type="checkbox"/> Vietnamese OCR	Language	30 % (150)	45
<input type="checkbox"/> License Durable - With Content	License	Fixed	75
<input type="checkbox"/> License Durable - Key	License	Fixed	50
<input checked="" type="checkbox"/> Classification	Processing	30 % (150)	45
<input type="checkbox"/> ICR (Intelligent)	Processing	60 % (150)	90

Maintenance (1.67.2016 - 30.06.2017, 12 months) Total: 1,440 EUR

Enable maintenance: @ Start Date: 01.07.2016 Duration: 12

Total Total: 8,640 EUR

PRODUCT CODE	PRODUCT NAME	ITEM PRICE (EUR)	QUANTITY	DISCOUNT	TOTAL PRICE (EUR)
FRE11RTLFLUMW000	FRE 11 RTL 100,000 Pages, non-renewable (TPC)	150	30	0	4,500
FRE11RTLFLUMW040	FRE 11 RTL_Arabic OCR	45	30	0	1,350
FRE11RTLFLUMW040	FRE 11 RTL_Arabic Classification	45	30	0	1,350
FRE11RTLFLUMW040	FRE 11 RTL_SMJJA 01.07.2016 - 30.06.2017, 12 months	48	30	0	1,440

Create Quote Cancel

Generate a pdf and send it to the customer

Sales: Licenses & Invoice Generation

Generate orders and invoices automatically

Invoice INV-00008

Notes & Attachments | Files | Invoice Lines

Invoice Detail

Account	Global Media	Net Amount	E2,250.00
Order	0000109	Invoice Date	09/06/2016
Invoice Name	INV-00008	Sent to Customer	<input type="checkbox"/>
Invoice Printed Number	00008-0906-16	Paid by Customer	<input type="checkbox"/>
Account Billing Country	Canada	Sent to Tax Adviser	<input type="checkbox"/>
Account VAT	23456789	Invoice URL	https://w-fn-demo.my.salesforce.com/sf/sfd
Created By	Andrey Bugaenko, 09/06/2016 13:17	Last Modified By	Andrey Bugaenko, 09/06/2016 13:17

Notes & Attachments

Action	Type	Title	Last Modified	Created By
Preview Download Del	File	Invoice.00008-0906-16	09/06/2016 13:17	Andrey Bugaenko

Files

Action	Title	Last Modified	Created By
Preview Download Del	Invoice.00008-0906-16	09/06/2016 13:17	Andrey Bugaenko

Invoice Lines

Action	Invoice Line Name	Product	Quantity	Unit P
Edit Del	INV-000010	Support	3.00	€12
Edit Del	INV-000099	Project	15.00	€12

Always show me more records per related list

Order 0000109

Order Detail

Order Number	0000109	Contract Number	02359.00
Account Name	Global Media	Order Type	Time Report
Order Start Date	01/06/2016	Status	Generated
Order End Date	09/06/2016	Shipping Address	
Customer Authorized By		Archived Date	01/05/2016
Company Authorized By		Heat Date	09/03/2016
Authorized By		Doc Date	09/03/2016

Test Finance Project

Time Entry	Date	Employee	Description	Spent Time(hrs.)
TL-000001	09/06/2016	Andrey Bugaenko	create some test classes	12
TL-000000	09/06/2016	Andrey Bugaenko	debugging	3
Total Amount:				1,600
Total Time:				1,678 days

Support

Time Entry	Date	Employee	Description	Spent Time(hrs.)
TL-000002	09/06/2016	Andrey Bugaenko	45%	3
Total Amount:				378
Total Time:				3 hours

Order Products (Standard)

Order Product	Product Code	Quantity	Unit Price	Total Price	Line Description
Est Del Subst	000001	15.00	€120.00	€1,800.00	
Est Del Subst	000002	3.00	€120.00	€375.00	

Order History

Date	User	Action
09/06/2016 13:16	Andrey Bugaenko	Changed Status from Generated to In Approval by Customer.
09/06/2016 13:13	Andrey Bugaenko	Revised Invoice.
09/06/2016 13:13	Andrey Bugaenko	Change Billing Country to Canada.
09/06/2016 13:13	Andrey Bugaenko	Change Billing Zip/Postal Code to L4B 1Y3.
09/06/2016 13:13	Andrey Bugaenko	Change Billing State/Province to Ontario.

Approval History

Action	Date	Status	Assigned To	Actual Approval	Comments	Overall Status
View Approval Request	09/06/2016 13:16	Pending	Andrey Bugaenko	Andrey Bugaenko		Pending
View Approval Request	09/06/2016 13:16	Approved	Andrey Bugaenko	Andrey Bugaenko		Approved
Approval Request Submitted	09/06/2016 13:13	Submitted	Andrey Bugaenko	Andrey Bugaenko	Submitting order for approval	

Customers can approve the expenses via Community Cloud

HR: Management by Objectives

[Human Resources](#)
[Recent](#) [Year Selection](#)

[Help for this Page](#)

Select employee: All employees

Yearly Quarterly Monthly

Yearly

▼ 2014 year: Goals Set - 100.00%. Achievements Filled - 100.00%. Completed - 100.00%

Manager	Employee	Lines	Goal %	Achievement	% achieved	Total Achievements %	Status	Action
Gary Williams	John Stewart	Goal						
		Increase the overall sales revenue by 20%.	50,00%	Exceeded the goal. 26%.	100,00%	90,00%	Completed	
		Hire five sales managers in both North and South America.	50,00%	Four sales managers only in both regions were hired.	80,00%			
Payroll comment: Edit								

▼ 2015 year: Goals Set - 100.00%.

Manager	Employee	Lines	Goal %	Achievement	% achieved	Total Achievements %	Status	Action
Gary Williams	John Stewart	Goal						
		Keep up the overall sales revenue growth of 20%.	60,00%			0,00%	Goals are set	
		Consolidate the sales force in both North and South America by hiring five more sales managers for each region.	40,00%					
Payroll comment: Edit								

[Back to top](#)

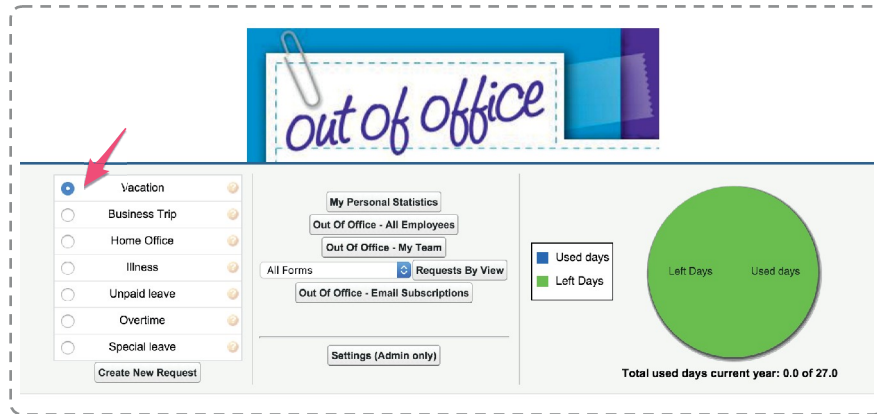
Quarterly

▼ Quarter 3 2015: Goals Set - 100.00%. Achievements Filled - 100.00%. Completed - 100.00%

Manager	Employee	Lines	Goal %	Achievement	% achieved	Total Achievements %	Status	Action
John Stewart	Amanda Brown (Second Manager: Gary Williams)	Goal						
		Increase the revenue by \$100k	50,00%	Goal reached.	100,00%	85,00%	Completed	
		Hire a new regional manager for the UK	30,00%	Two candidates found and invited for an interview.	50,00%			
		Acquire a new retail partner for the UK	20,00%	Acquired.	100,00%			
Payroll comment: Achievements considered in the payroll check for October 2015. Edit								

App soon on Salesforce AppExchange: <https://goo.gl/k4yFrb>

HR: Out of Office



- 1. Choose the reason why you are out of office

- 2. Fill in the details

OOO/Home Office
000-09594

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

Show Feed

< Back to List: OOO/Home Office

Approval History [2]

OOO/Home Office Detail

Unlock Record Edit Delete Submit for Approval Cancel Request

Type	Business Trip	Owner	Vera Schwarz [Change]
Start Date	05.11.2015	Status	Approved
End Date	05.11.2015		
Public Comment			
Comment For The Manager			

▼ Business Trip Details

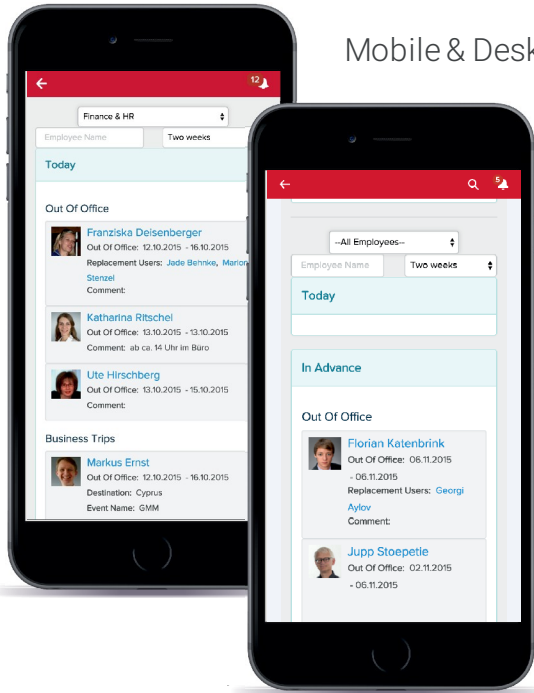
Business Trip Destination	New York	Event Name	Some Fair
Account Name		Lead Name	

▼ System Information

Wishes for OOO	Create event for the user
----------------	---------------------------

HR: Out of Office

Mobile & Desktop



3. Check your colleagues' Out-Of-Office times

Additional Information				
Fabiane is OOO until 12:30 pm.				
Department: Marketing Employee (* = wildcard): Employee Name				
Today				
Out Of Office				
Name	Start Date	End Date	Replacement Users	
Christian Schwarzmann	30.01.2015	30.01.2015		
Elisabeth Heide	27.01.2015	30.01.2015		
Michael Fuchs	30.01.2015	30.01.2015		
Vanja Kuhn	30.01.2015	30.01.2015		
Home Office				
Name	Start Date	End Date		
Katja Ochoel	30.01.2016	30.01.2015		
In Advance				
All Time Out Of Office				
Name	Start Date	End Date	Replacement Users	
Eva Weber	16.02.2015	20.02.2015		
Katja Ochoel	20.02.2016	20.02.2015		
Katja Ochoel	09.04.2015	09.04.2015		
Business Trips				
Name	Start Date	End Date	Destination	Event with Customer
Michael Fuchs	04.02.2015	05.02.2015	Darmstadt	Partnerstag with Intelligent Visions GmbH

HR: OnBoarding

Checklist - Overview: Jennifer Bush

19.23% completed

Status: Checklists in Progress

Employee Information

Name	Ms. Jennifer Bush
Department	IT
First Day of Work	01.12.2015
Company Email	jennifer.bush@chocsalesinc
Vacation Annual	25.00

Checklist - Manager

- Checklist - Manager: Business Systems
 - Salesforce Services
- Checklist - Manager: Finance
 - AFS Time Recording
 - OLAP HQ
 - AXAPTA OLAP
- Checklist - Manager: Human Resources
 - OrgChart Photo
 - Info Mail with Welcome Kit
 - Entry Card
 - Vacancy-Nr
- Checklist - Manager: IT
 - Access Login
 - Computer Laptop New
 - Docking Station
 - Keyboard

Employee Detail

Employee HR_EM-0018

General Information

Salutation	Ms.
First Name	Jennifer
Last Name	Bush
Date of Birth	03.04.1985
Private Email	jen.bush@hotmail.com

Job Details

Contract Signed	<input checked="" type="checkbox"/>
Job Title	IT Manager
Department	IT
Manager	Ethan Taylor

Employee ID: HR_EM-0018
Created By: System Admin, 29.10.2015 20:22

Checklists (Employee)

Action	Checklist ID	MA Completed
Edit Del	HR_CH-0016	<input type="checkbox"/>

Checklist - Overview: Jennifer Bush

57.14% completed

Status: Checklists in Progress

Employee Information

Name	Ms. Jennifer Bush	Job Title	IT Manager
Department	IT	Manager	Ethan Taylor
First Day of Work	01.12.2015	Company Email	jennifer.bush@chocsalesinc

Set the entry date and time:

Checklist - Human Resources

OrgChart Photo	<input checked="" type="checkbox"/>	Mailbox	<input checked="" type="checkbox"/>
Info Mail with Welcome Kit	<input checked="" type="checkbox"/>	Entry Card	<input type="checkbox"/>
Keys	<input checked="" type="checkbox"/>	Vacancy-Nr	<input type="checkbox"/>

Comment(optional)

Services: Professional Services and Time Tracking

2015 - October
12 Mon
13 Tue
14 Wed
15 Thr
16 Fri

PS Tasks		12 Mon	13 Tue	14 Wed	15 Thr	16 Fri	
[Mentana/DRV] De-Ma...	System-Installation	0	4.00	0	0	0	0/4.00
[KGS/Röchling] Rech...	Projektleitung						0 0
[Mentana/DRV] De-Ma...	Projektumsetzung						0 0
[Eucon] POC Rechnu...	API Advanced Sc						0 0
[ABBY/Škija] Classif...	Service v2.0						0 0
[KGS/Röchling] Rech...	Feinkonzepterste						0 0
[d.velop/RTA Alesa] R...	Projektleitung						0 0
[Würth/Psinova] Rech...	Projektumsetzung	0	0	0	0	0	0 0
[KGS/Röchling] Rech...	Abnahmelistenstell...	0	0	0	0	0	0 0
Total:		0	0/4.00	0	0	0	0/4.00

PS Task

Name: System-Installation

Project: [Mentana/DRV] De-Mail Gateway Datenextraktion

Responsible: Ivan Gravanov

Status: Ongoing

View Edit

Cases		12 Mon	13 Tue	14 Wed	15 Thr	16 Fri	
aequibx GmbH	CSE-00019845	0	0	0	0	0	0
eucon GmbH	CSE-00018386	0	0	0	0	0	0
AOK-Bundesverband	CSE-00006779	0	0	0	0	0	0
OXEA GmbH	CSE-00002498	0	0	0	0	0	0
RR Software GmbH	CSE-00014665	0	0	0	0	0	0
DMS Factory GmbH	CSE-00007596	0	0	0	0	0	0
Xtendit Solutions	CSE-00003024	0	0	0	0	0	0
Total:		0	0	0	0	0	0

<< Previous Week
39: 21.09.2015 - 27.09.2015
Next Week >>

Monday		21.09.2015		TotalTime: 2.00	
Task	[Mentana/DRV] De-Mail Gateway Datenextraktion	Projektumsetzung	Mertana-Claimsoft GmbH	Umsetzung Übergabeschnittstelle	billable 2.00

Tuesday		22.09.2015		TotalTime: 6.50	
Opportunity	Eucon_PoC_FC41	eucon GmbH	Besprechung FC in Cloud	non billable 0.50	
Task	[Mentana/DRV] De-Mail Gateway Datenextraktion	Projektumsetzung	Mertana-Claimsoft GmbH	Umsetzung Übergabeschnittstelle	billable 6.00

Wednesday		23.09.2015		TotalTime: 6.00	
Task	[Mentana/DRV] De-Mail Gateway Datenextraktion	Projektumsetzung	Mertana-Claimsoft GmbH	Umsetzung Konvertierung	billable 6.00

Thursday		24.09.2015		TotalTime: 8.00	
Opportunity	SER_FC41 Evaluierung Partnerschaft	SER Holding Europe GmbH	Vor-Ort-Workshop FC41 Vorstellung	non billable 8.00	

Friday		25.09.2015		TotalTime: 4.00	
Task	[Mentana/DRV] De-Mail Gateway Datenextraktion	Projektumsetzung	Mertana-Claimsoft GmbH	Umsetzung Konvertierung	billable 4.00

Total Week Time: 26.50

Total Billable Time: 18.00

Services: Training Management

- Registration of new participants
- Schedule on-site and online trainings
- Fill training offers by sales team
- Managing of training participants
- Managing certifications and partners
- Training Invoicing
- Fulfillment Statistic

Training Detail [Edit](#) [Delete](#) [Clone](#)

Training Name	DE FC10 Full Certification Training_EN_10/2014	Start date	13.10.2014
Training code	TR-0249	End date	17.10.2014
Product	FlexiCapture 10.0	Total Revenue	2.400,00
Training type	Full Technical Certification	Cancelled	<input type="checkbox"/>
Responsible Office	Munich/DE	Dinner date	14.10.2014
Country	DE	Owner	Josipa Pusic [Change]

Additional Information

Description: No PO from d velop received for invoicing so far. SA.24.10.2014
PO# FC11 Full C. Training / bestätigt durch d velop und Kerstin B.

Statistic

Number of applied participants	6	Participants completed	83%
Number of ordered participants	4	Sales completed	67%
IsCompleted	1	SalesAdmin completed	100%

System Information [Edit](#) [Delete](#) [Clone](#)

Training Participants [New Training Participant](#) [Training Participants Help](#)

Action	First Name	Last Name	Account	Trial license	Vegetarian	Certification type	Certification number	Certification date	GPA
Edit Del	Michael	Strobel	XXXXXXXXXXXXXXXXXXXX	no		Certified Consultant	XXXXXXXXXX	17.10.2014	93
Edit Del	Sebastian	Schubert	XXXXXXXXXXXXXXXXXXXX	no		Certified Consultant	XXXXXXXXXX	17.10.2014	98
Edit Del	Stefan	Strobel	XXXXXXXXXXXXXXXXXXXX	no		Certified Practitioner	XXXXXXXXXX	17.10.2014	95
Edit Del	Michael	Strobel	XXXXXXXXXXXXXXXXXXXX	no		Certified Consultant	XXXXXXXXXX	17.10.2014	98
Edit Del	Michael	Strobel	XXXXXXXXXXXXXXXXXXXX	no		Certified Consultant	XXXXXXXXXX	17.10.2014	100
Edit Del	Sebastian	Schubert	XXXXXXXXXXXXXXXXXXXX	no		Certified Consultant	XXXXXXXXXX	17.10.2014	80

Training Offers [New Training Offer](#) [Training Offers Help](#)

Action	Account	Participants number	Total Revenue	Cost per person	Cost per day	Invoice date	Invoice Number
Edit Del	XXXXXXXXXXXXXXXXXXXX	2	4.000,00	2.000,00	400,00	24.10.2014	XXXXXXXXXX
Edit Del	XXXXXXXXXXXXXXXXXXXX	2	2.400,00	1.200,00	240,00	29.10.2014	XXXXXXXXXX



Questions? Remarks?

Let's act together!