



## Propose2Project

### Run your service business end to end on the Salesforce platform

After hundreds of Salesforce implementations with service firms, and using the system ourselves, App Solve has developed an end-to-end implementation package that addresses 80% of what the typical service firm needs. Then we'll customize the rest.

By taking advantage of App Solve's experience with service companies you'll cut costs by implementing a tried and tested automated workflow tailored specifically for your type of business.

You'll gain efficiency and productivity, then supercharge revenues.

While it's possible to remove certain components of this implementation, we recommend the following modules:



#### Campaigns and Leads

Supercharge your marketing, lead generation and lead nurturing using either Salesforce Marketing Cloud or Pardot.



#### CRM

Leverage the world's number 1 CRM - Salesforce.com to manage your Accounts, Contacts and sales pipeline. Integrate your website to your CRM using lead forms to accelerate lead flow and conversion.



#### Automated Proposal Creation

Automate and streamline the back office proposal process for quick and easy proposal creation and delivery manual, or directly through your CRM.



#### E-Signature

Once you've received a verbal from your prospect, send your proposals through automated e-signature so that sales opportunities become 'closed won' upon client signature - even on their phone.



## Downstream Operational Automation

What takes place in your business? If the next step is invoice creation to send to your customer and a project created for you to manage your service delivery, then this system is for you!



## Financials through AccountingSeed

Invoice creation takes place automatically and is derived from information on the now accepted proposal. We typically create the system so that the invoice sits in draft mode until your appropriate employee does a final review, then sends it out for execution.



## Project Management

We've built a customized project management system within Salesforce.com that is a great fit for service firms that allows you to manage your service delivery, right from within your end-to-end system, connected to marketing, sales and financials.

Accounting Seed's timecards are implemented here to ensure all time is logged accurately so you can effectively manage gross project profit.



## Optional - Field Service Lightning

If your operations include servicing your customers onsite, we would recommend Salesforce's Field Service Lightning application. App Solve has implemented Field Service Lightning with the most businesses of any Canadian-based Salesforce partner.



## Payroll through HUMI & Vendor Payments through Salesforce

Work with our payroll and HR partner - Humi; to compensate your employees for their great work. We work with our customers to ensure they're able to also make vendor payments to sub-contractors, or to any type of vendor required.



## Analytics

With your entire business' information in one platform, it's time to glean the insights you need make crucial decisions in order to scale and achieve the benefits from a fully automated business process.



Service Company Consulting, Salesforce.com Implementation, Subscription Support and Training

App Solve - Salesforce Projects Solved

Contact us at 800.539.7501 [hello@appsolvetetech.com](mailto:hello@appsolvetetech.com)

