WHITE CUP

TDF Administrative Managed Services

Outsource admin work for easier ROI.

Administrative Subscription is an option for customers who want to outsource all administrative aspects of the software platform. This package helps customers with the technical aspects of managing the software, keeping the platform current in supporting your business needs both today and in the future, and perform routine administrative functions (such as creating dashboards, adding users, changing permissions, training of new functions or users, and more).

An Administrative Subscription will enable you to best optimize your company resources without needing to invest in the management and configuration of the platform.

About White Cup

White Cup offers data-driven selling technology that makes selling smarter, faster, and easier for distributors. White Cup's industry-specific CRM, Business Intelligence (BI), and Pricing products drive revenue, improve profits, and reduce overall costs. With decades of industry experience, White Cup is trusted by more than 1,000 customers globally.

To learn more about how the White Cup team can help managing your White Cup software easier, email **managedservices@whitecupsolutions.com**

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Visit whitecupsolutions.com to learn more.

TDF Administrative Managed Services

The following services are offered for scheduled service:

User Management

Changes to users that will need to be specified in advance of maintenance session

» Addition and setup of new employees

» Removal or deauthorization of former employees

» User permissions, security levels and template administration

» General management of settings found under the administrative section for user management

Business Intelligence (BI) Integration Support

» Modification / Creation of dashboards or Reports

Screen Design

Changes to the UDF so better sculpt the forms for your business needs

» Adding new UDFs as needed.

» Updating Current UDFs.

Grid Management

Changes to the views in Grids to better help users see the data

» Setting up Global views for the Sales Teams

» Create personal Views as needed for individuals

» Setup Company Default Grid view

Miscellaneous Support

Additional time is allotted to ensure that all of the administrative tasks involved with each of these services can be taken care of. The use of this time will be agreed upon during the Quarterly Review preceding the scheduled miscellaneous services timeslot.

Miscellaneous Services are restricted to Administrative Services and are not eligible to include project work that would normally fall under a separate service or that would be completed as a one-time paid project such as equipment pricing preparation or bookmarking.

Territory Management

Changes to territory and account assignment that will need to be specified in advance of maintenance session

» Creation, updating or modifying existing territories according to information provided by your team.

» Bulk account assignments as needed for either adding primary, secondary, or removing reps from accounts through the bulk assignment tool

Advanced Feature Setup & Maintenance

» Create and Maintain Alerts and Notifications

» Create and Maintain reporting

» Template Administration

» Data Clean-Up

» Annual Sales Planning and Reporting (8 hours) within your schedule

Ensure that your administrative needs are covered by your professional services plan with quarterly reviews with your White Cup team.

A 30-minute meeting at the end of each quarter will be used to discuss the current coverage, and if any additional time may be needed to accomplish additional tasks that are needed or changes in the upcoming schedule for maintenance.

This could include:

» Cross training to build administrative knowledge as needed

» Monthly Health Check maintenance

» Best practices for better utilization