



INNOVATING YOUR BUSINESS PROCESSES

RapidValue FOR SALES



A vertical traffic light on a blue pole, with the green light illuminated. The background is a blurred city street at night with colorful bokeh lights.

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FACTS

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BUSINESS SCOPE

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PROJECT SCOPE

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HIGHLIGHTS

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HOW TO START / GET IN TOUCH

FACTS- ORBIS RapidValue FOR SALES



Fast

Fixed Timeframe

- ◆ Implementation in 6-10 weeks
- ◆ Immediately available in the Microsoft Cloud



Fixed Price

- ◆ An attractive fixed price for the solution



Fixed Scope

- ◆ A clearly defined Statement of Work
- ◆ A well-defined project organization from the start



High Quality

- ◆ Best Practice Processes
- ◆ Industry Solutions

*A combination of software services.
Preconfigured solutions and consulting services.
Ready to use right away and flexibly configurable*

Various plans for different service and software packages

Tailored to your organization and open to additional requirements and growth

Get started right away with proven, tested, and established best-practice processes and industry solutions

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PROJECT SCOPE

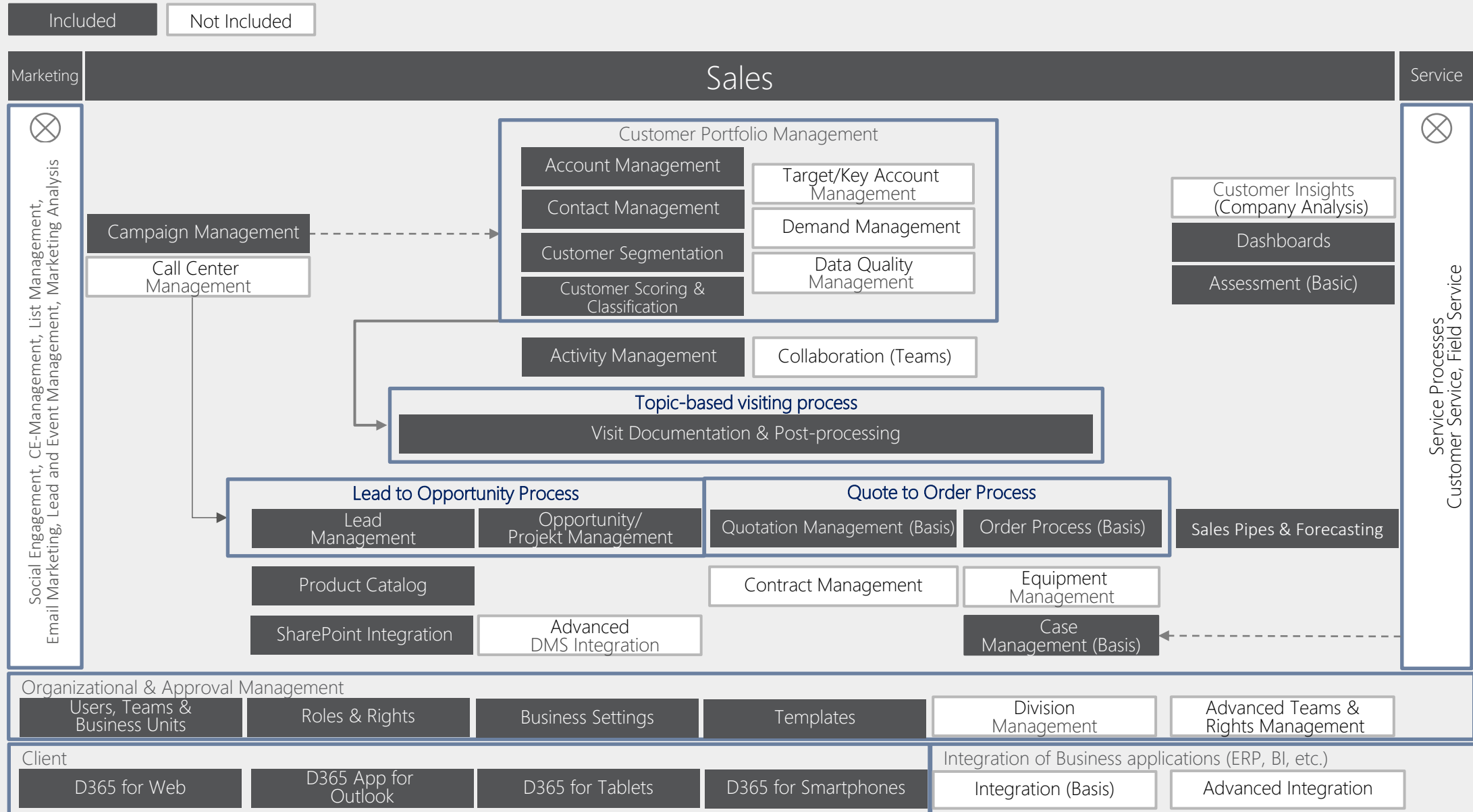
04

HIGHLIGHTS

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HOW TO START / GET IN TOUCH

RapidValue BUSINESS SCOPE



RapidValue USE CASES



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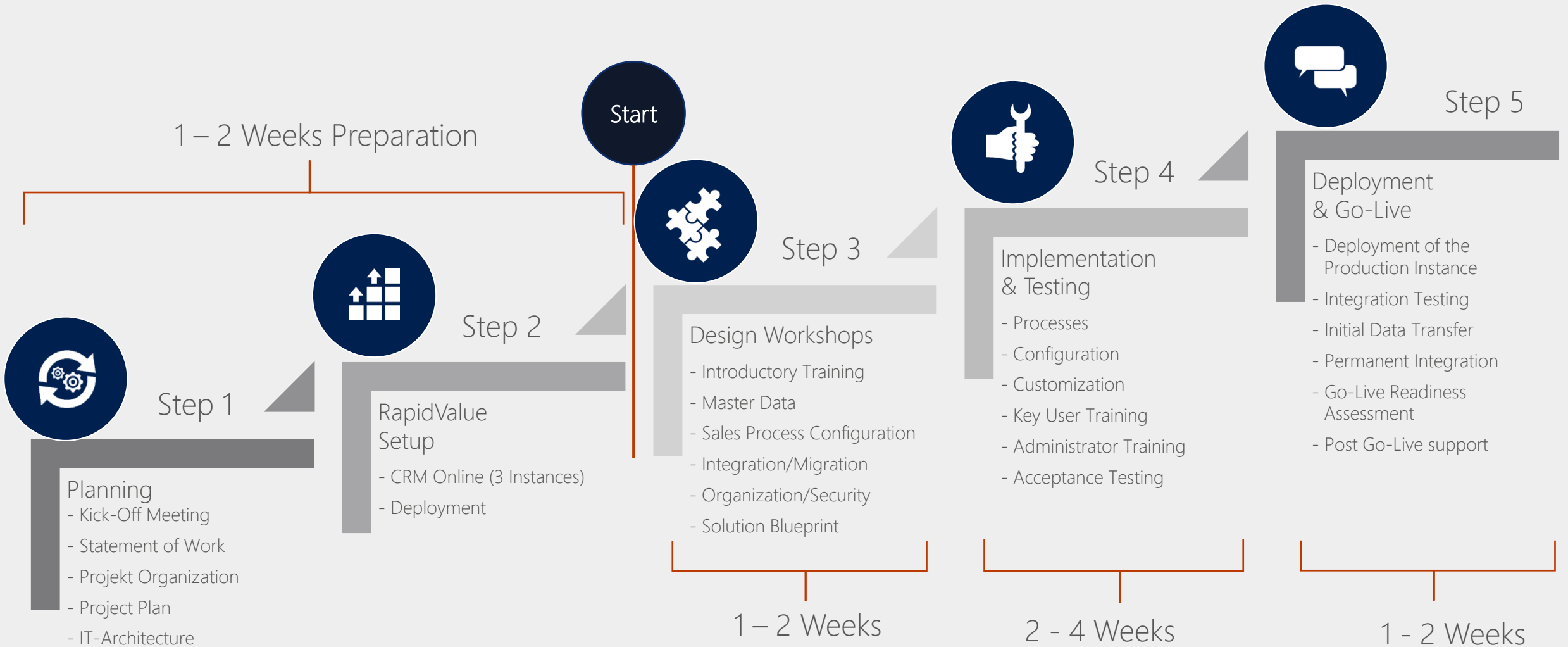
HIGHLIGHTS

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HOW TO START / GET IN TOUCH

RapidValue PROJECT SCOPE

- 5 STEPS TO SUCCESS



PROJECT SCOPE: CUSTOMER INVOLVEMENT



Customer involvement from the start...

- ◆ for faster know-how transfer
- ◆ for better understanding and higher quality
- ◆ to ensure that end users receive competent support
- ◆ to be more independent
- ◆ to save budget
- ◆ for complete transparency
- ◆ for no hidden costs



PROJECT SCOPE: HIGH LEVEL PLAN

Phase	Tätigkeit/Leistung	Days (Total)	Workshop Days
1 Planning	Planning Workshop	2	1
	Kickoff	2	1
2 Setup	RapidValueONE Setup	2	
	Administrators (Setup) Coaching	2	
3 Design	D365 Onboarding	2	1
	Design Workshops	19	
4 Implementation, Training & Tests	Solution Blueprint	1,5	1
	Customization and configuration; testing and quality assurance	13	
	Integration und Migration (Excel)	2	
	Administrator Training	2	1
	Key User Training	4	2
5 Go-Live	Coaching before and during acceptance tests	4	
	Go-Live Readiness Assessment	1,5	1
	Deployment and Initial Data Transfer	3	
General	Support after Go-Live	2	
	Project Management & Coordination	10	
SUM OF DAYS		72	



A vertical traffic light on a blue pole. The top light is green and illuminated. The middle and bottom lights are also green but not illuminated. To the right of the main light is a smaller light with an amber light illuminated. The background is a blurred city street at night with colorful bokeh lights.

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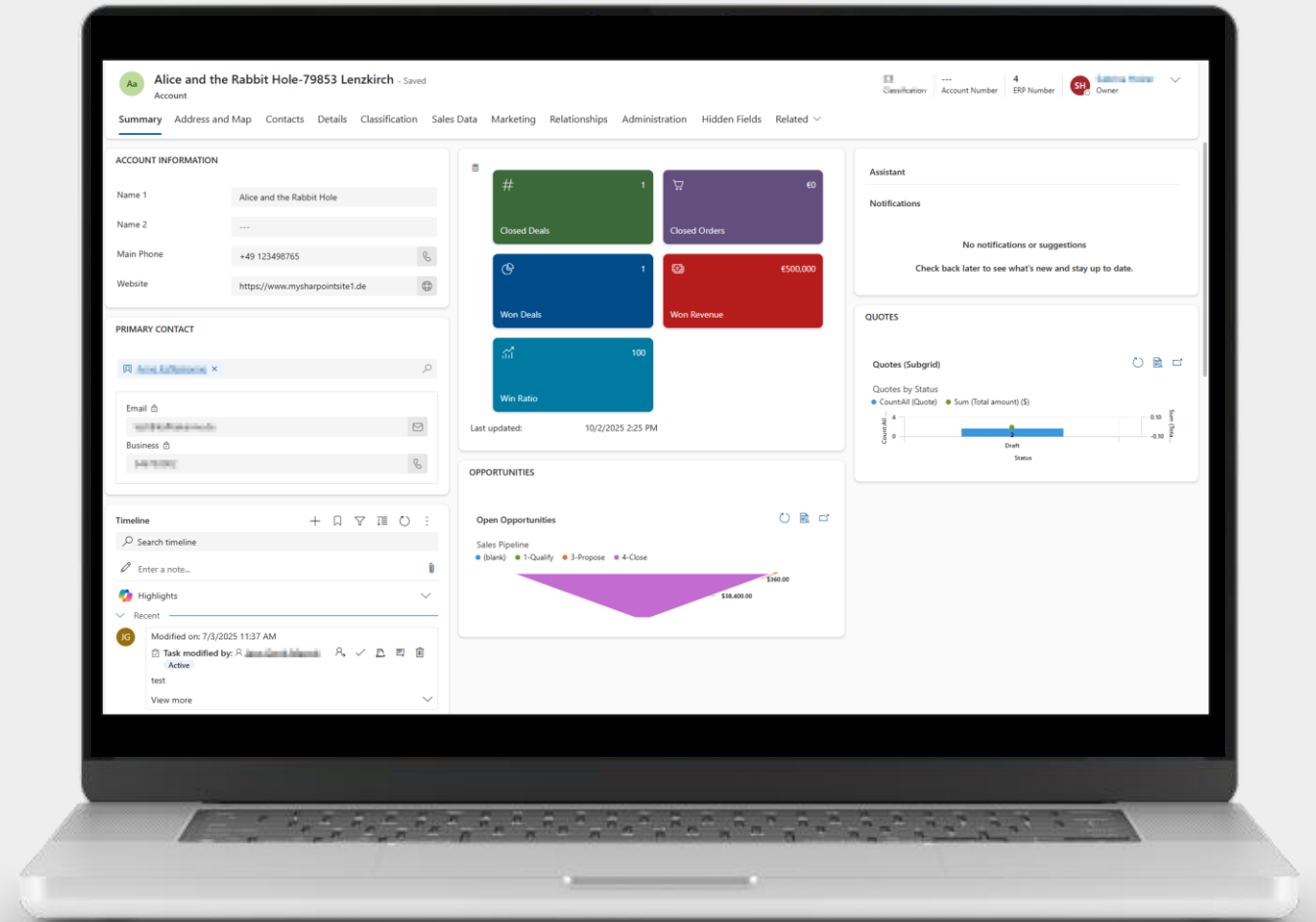
HIGHLIGHTS



Predefined Forms

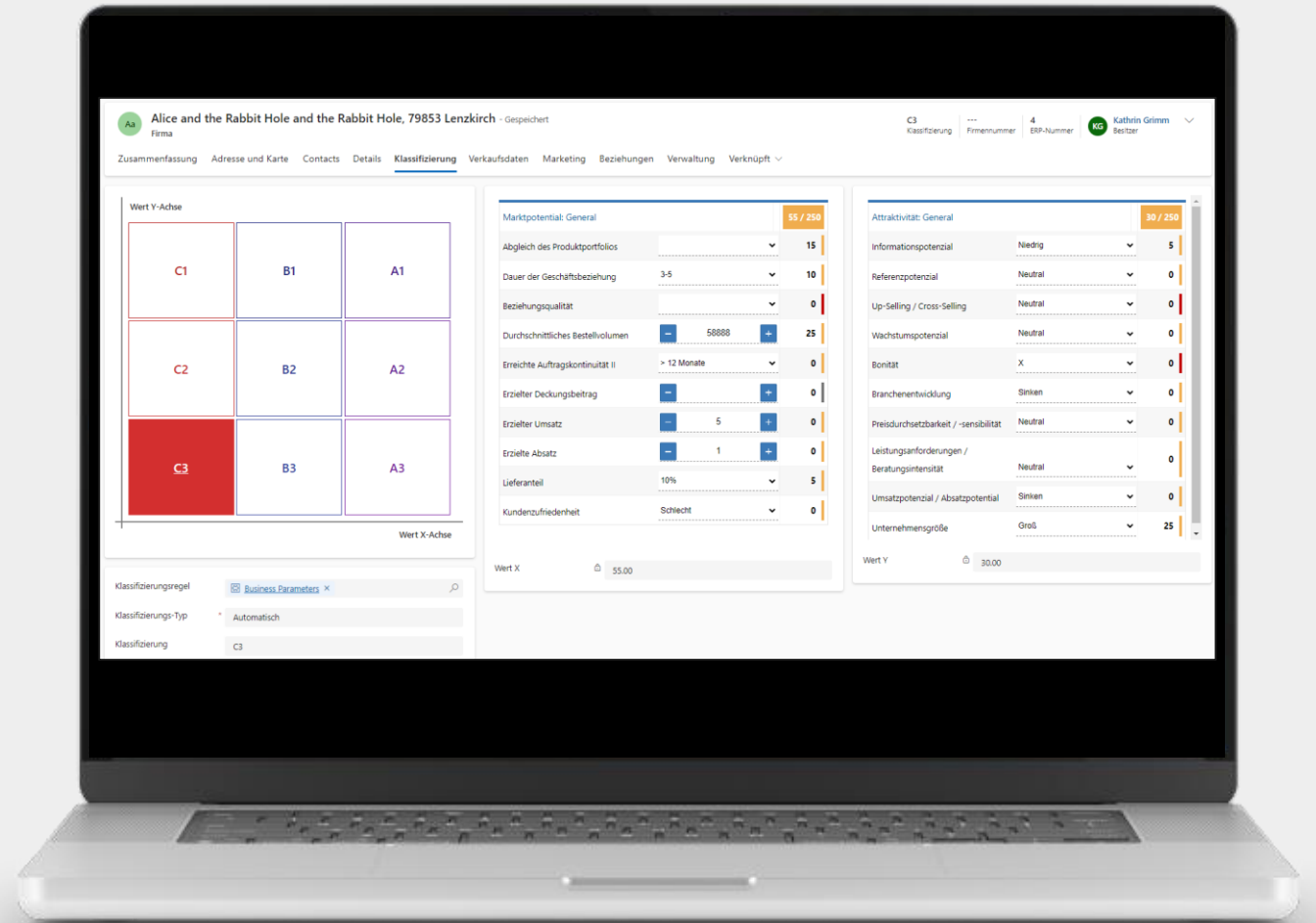
Predefined forms for these entities:

- » Accounts
- » Contacts
- » Leads
- » Opportunities
- » Competitors
- » Offers
- » Orders
- » Cases



Segmentation

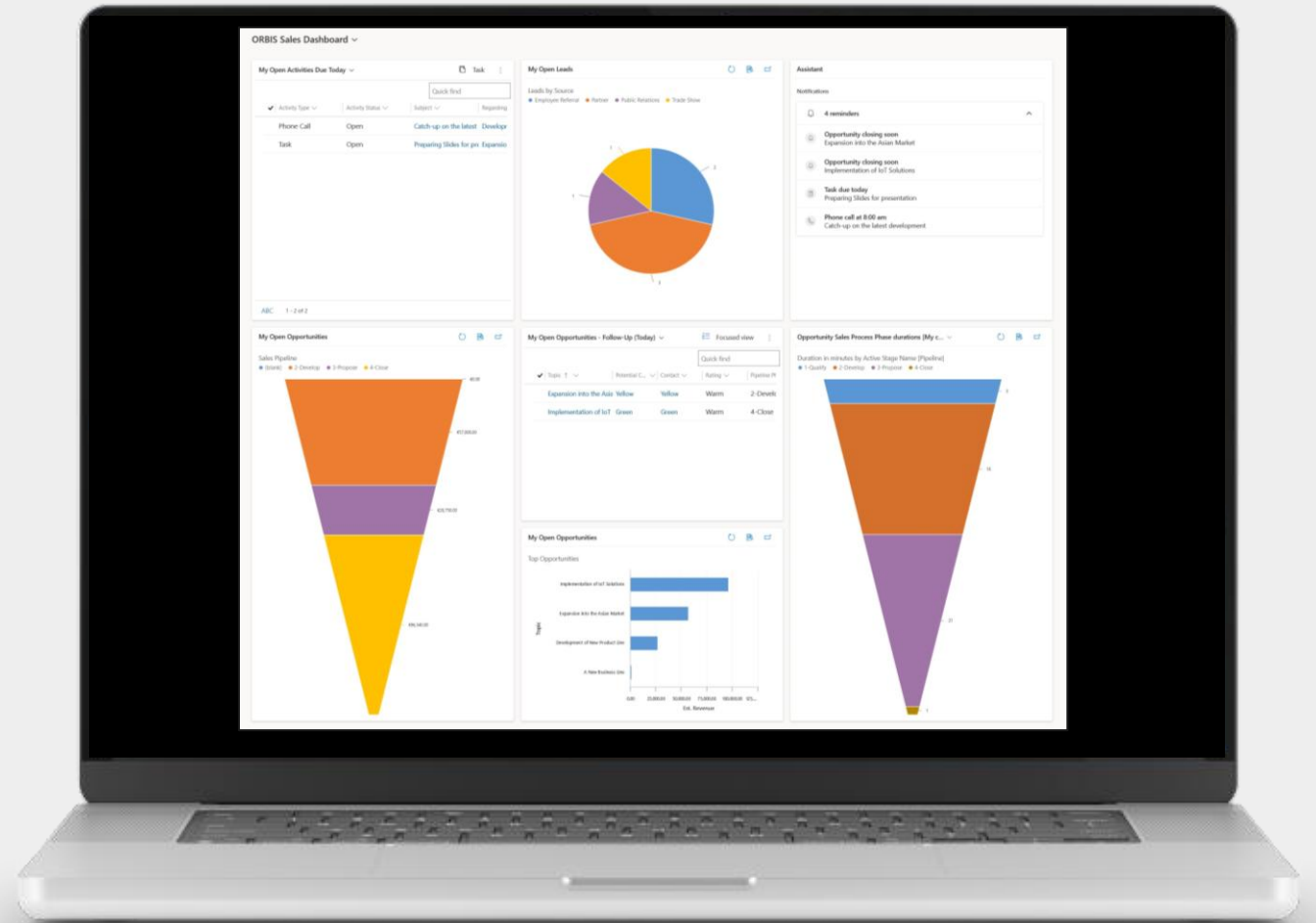
- » Scoring
- » KPIs



HIGHLIGHTS



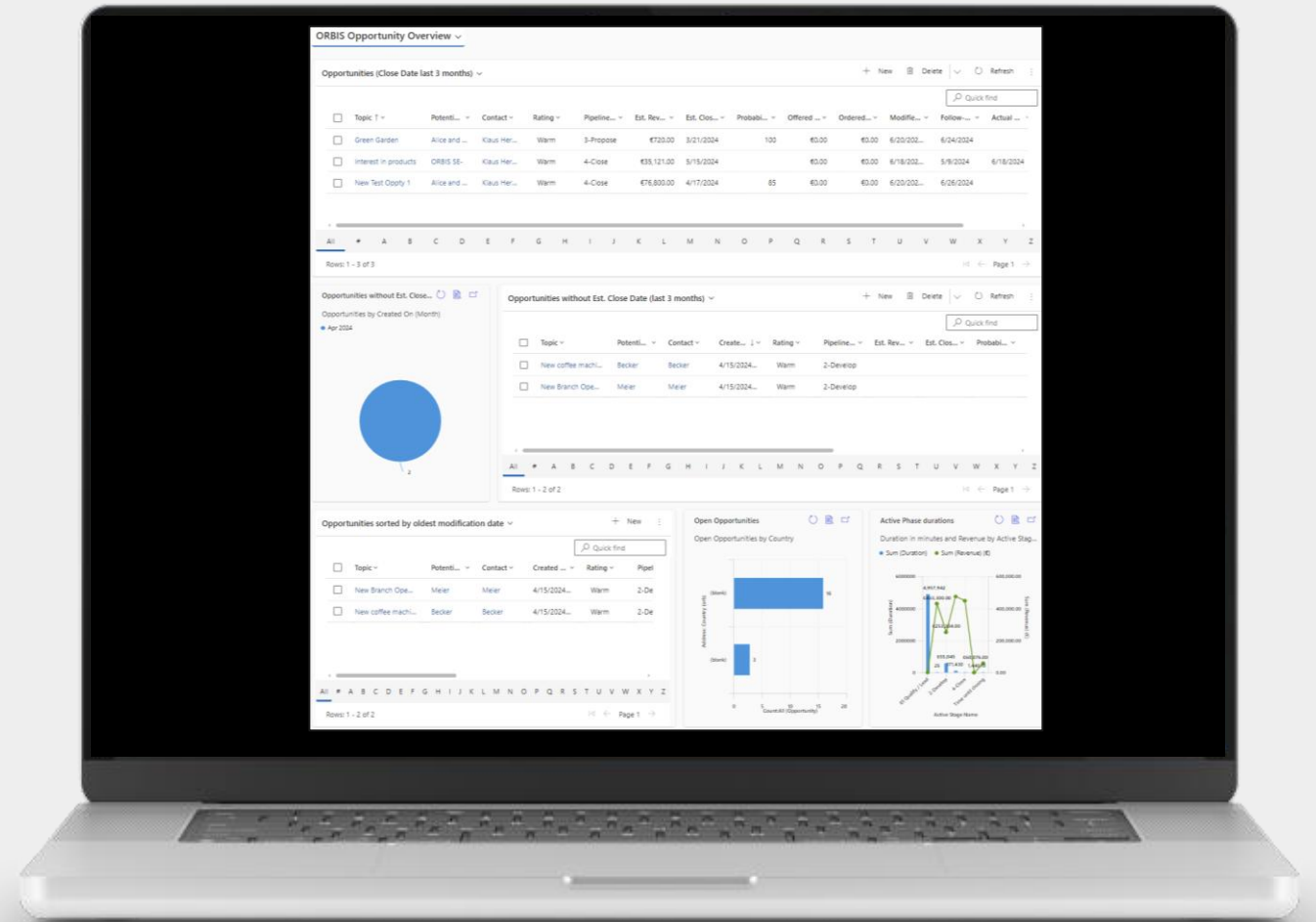
Sales Dashboard



HIGHLIGHTS



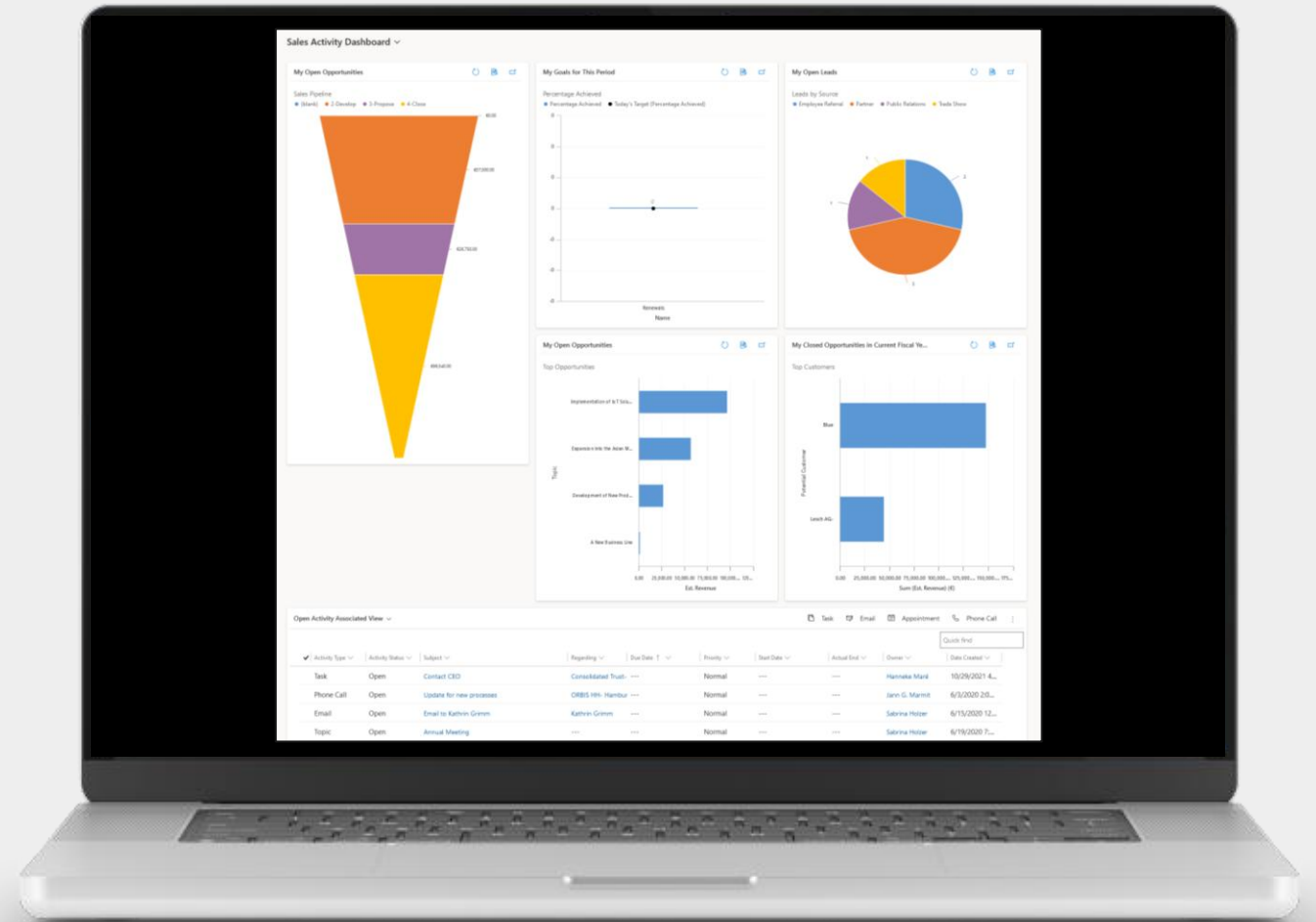
Opportunity Overview



HIGHLIGHTS



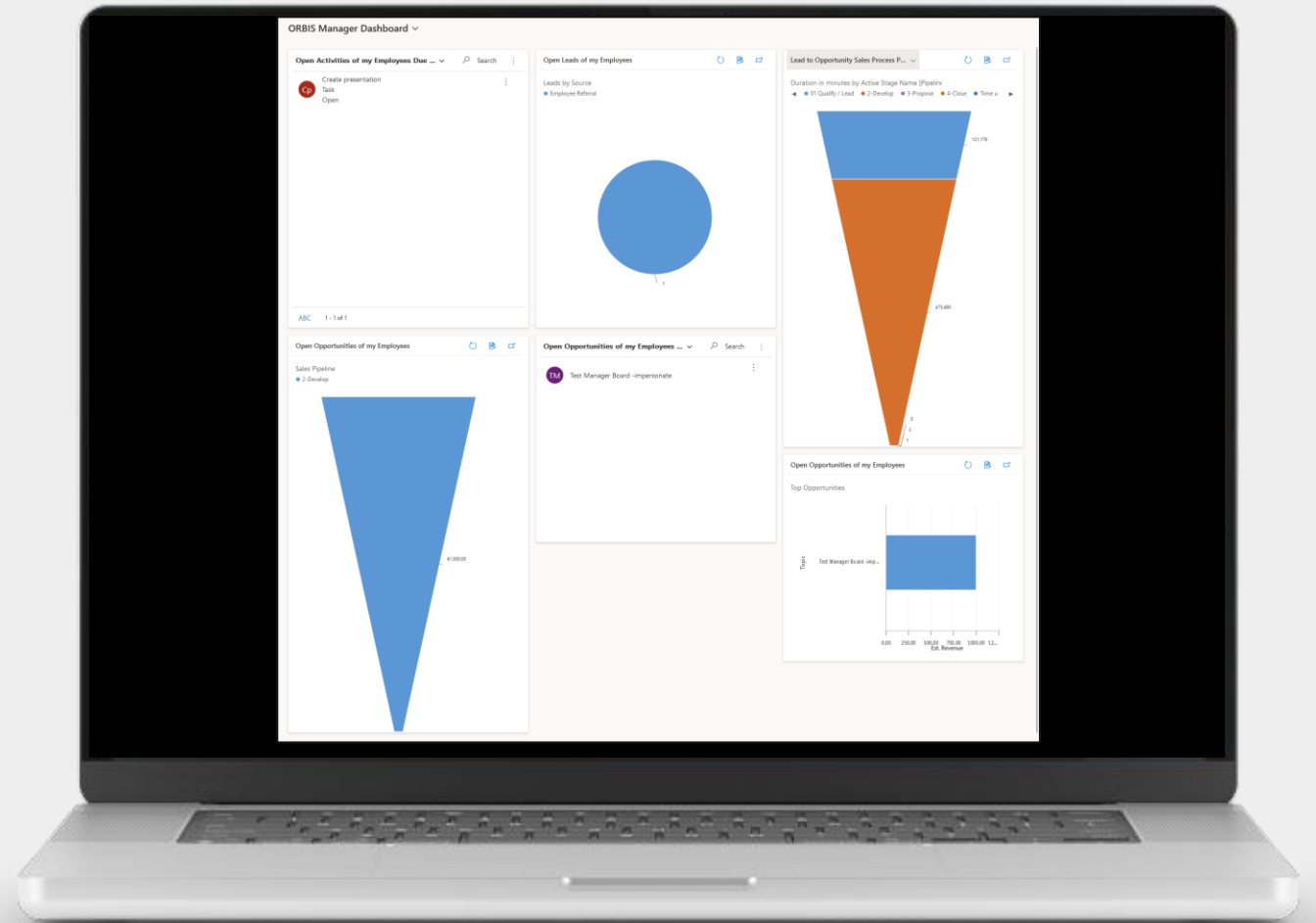
Sale Activity Dashboard



HIGHLIGHTS



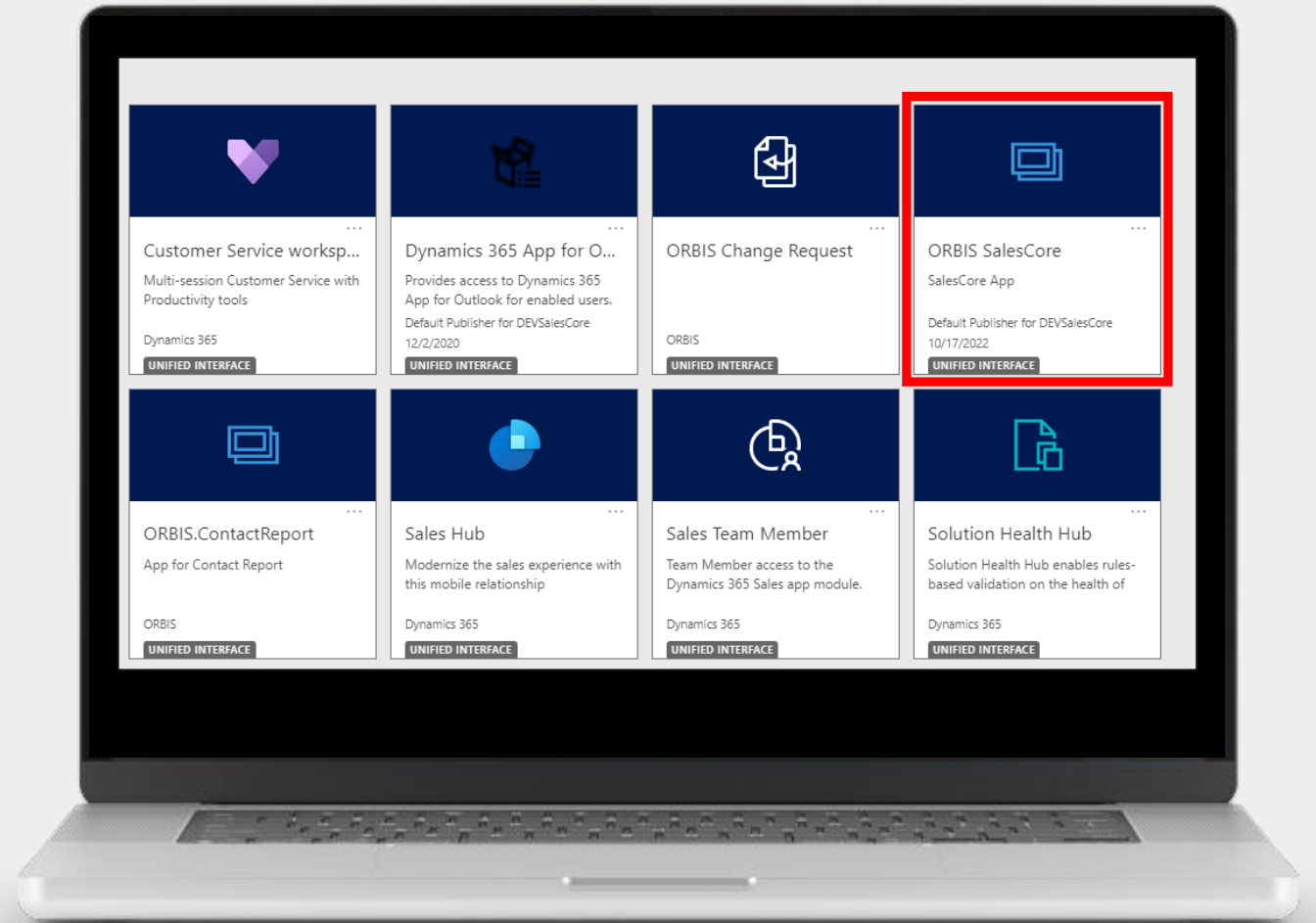
Manager Dashboard



HIGHLIGHTS



Ready to use Application



HIGHLIGHTS

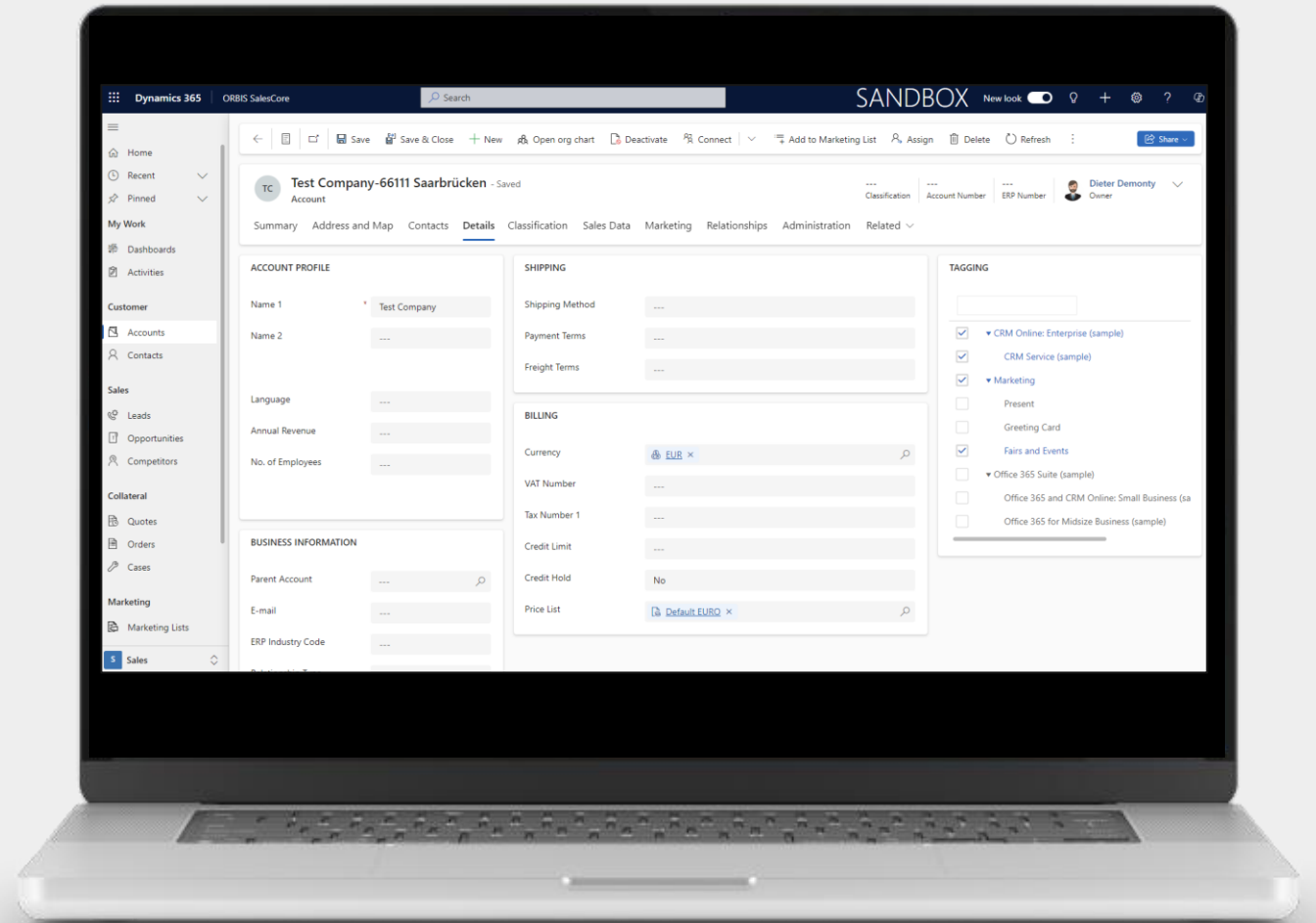


Tagging

Tagging for:

- » Accounts
- » Contacts
- » Leads
- » Opportunities

with an expandable structure view



HIGHLIGHTS



Predefined Security Concept

Security Role: ORBIS SalesCore Salesperson Working on solution: Default Solution

Details | Core Records | Marketing | Sales | Service | Business Management | Service Management | Customization | Missing Entities | Business Process Flows | Custom Entities

Table	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account	🔒	🟢	🟢	🔴	🟢	🟢	🔒	🔴
ACViewMapper	🔴	🟢	🔴	🔴				
Action Card	🔒	🔒	🔒	🔴	🔒	🟢	🔴	
Action Card User Settings	🔒	🔒	🔒	🔒				🔒
Activity	🔒	🟢	🔒	🔒	🔒	🔒	🔒	🔴
Advanced Similarity Rule	🔴	🔴	🔴	🔴	🔴	🔴		
Announcement	🔴	🟢	🔴	🔴		🔴		
Application File	🔴	🟢	🔴	🔴				
Category	🔴	🟢	🔴	🔴	🟢	🟢	🔴	🔴
Connection	🔒	🟢	🟢	🔒	🟢	🟢	🔒	🟢
Connection Role	🔴	🟢	🔴	🔴	🔴	🔴		
Contact	🔒	🟢	🟢	🔴	🟢	🟢	🔒	🔴
Customer Relationship	🔒	🟢	🔒	🔒	🟢	🟢	🔒	🔴
Data Import	🔴	🔴	🔴	🔴	🔴	🔴	🔴	🔴
Data Map	🔒	🟢	🔒	🔒	🔒	🔒	🔒	🟢
Data Performance Dashboard	🔴	🔴	🔴	🔴	🔴	🔴		
Document Location	🟢	🟢	🟢	🔴	🟢	🟢	🟢	🟢
Document Suggestions	🔴	🟢						
Duplicate Detection Rule	🔴	🟢	🔴	🔴	🔴	🔴	🔴	🔴
Email Signature	🔒	🟢	🔒	🔒	🔴	🔴	🔒	🔴
Email Template	🔒	🟢	🔒	🔒	🔒	🔴	🔒	🔴



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GET IN TOUCH

» You can contact Tobias Krämer directly to discuss your options

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Damien Schirrer, Frank Schmelzer
Chairman of the Supervisory Board: Ulrich Holzer

