Agenda

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Who we are

2 Nintex Drawloop DocGen
Product introduction

3 Use Cases
Descriptions for demo examples

4 Live Demo
Salesforce document generation

5 Wrap-up
Q&A, Next steps

RadixBay

Who We Are

Rural Sourcing Value Proposition

Rural shore combines the cost benefits of offshore services with the security and simplicity of onshore support to deliver cost effective, high-quality solutions.

Our Services

Managed Services

24x7 support for all major DB and OS platforms

Salesforce Support

Implementation, customization and ongoing support

Application Support

Development and testing
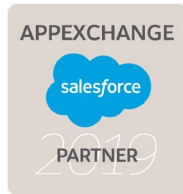
Advisory Services

Strategic and operational advice

Partnerships

Microsoft Partner
Silver Certified

salesforce registered consulting partner

ORACLE
SILVER PARTNER

Nintex for Salesforce

nintex Drawloop **+** salesforce

4.9 Average Rating | 300+ Reviews

APPEXCHANGE salesforce PARTNER 2019

G2

Leader: *Best Salesforce CRM Document Generation Software*
Leader: *Best Business Process Management Software*

FORRESTER®

Leader: *Digital Process Automation for Wide Deployments*

8,000+
enterprise
customers

90+
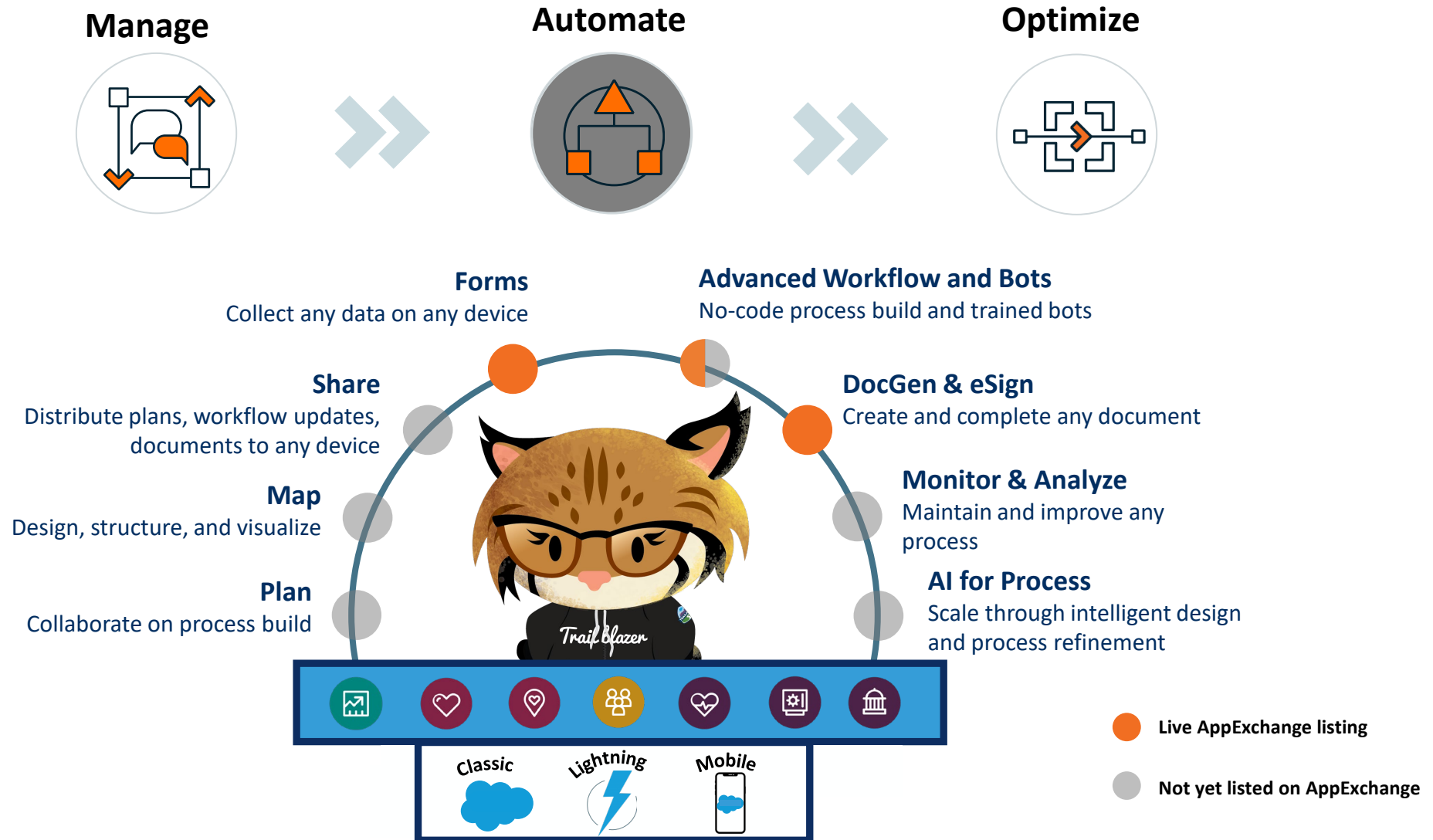Countries with partners
and customers across
industries

3M+
workflow
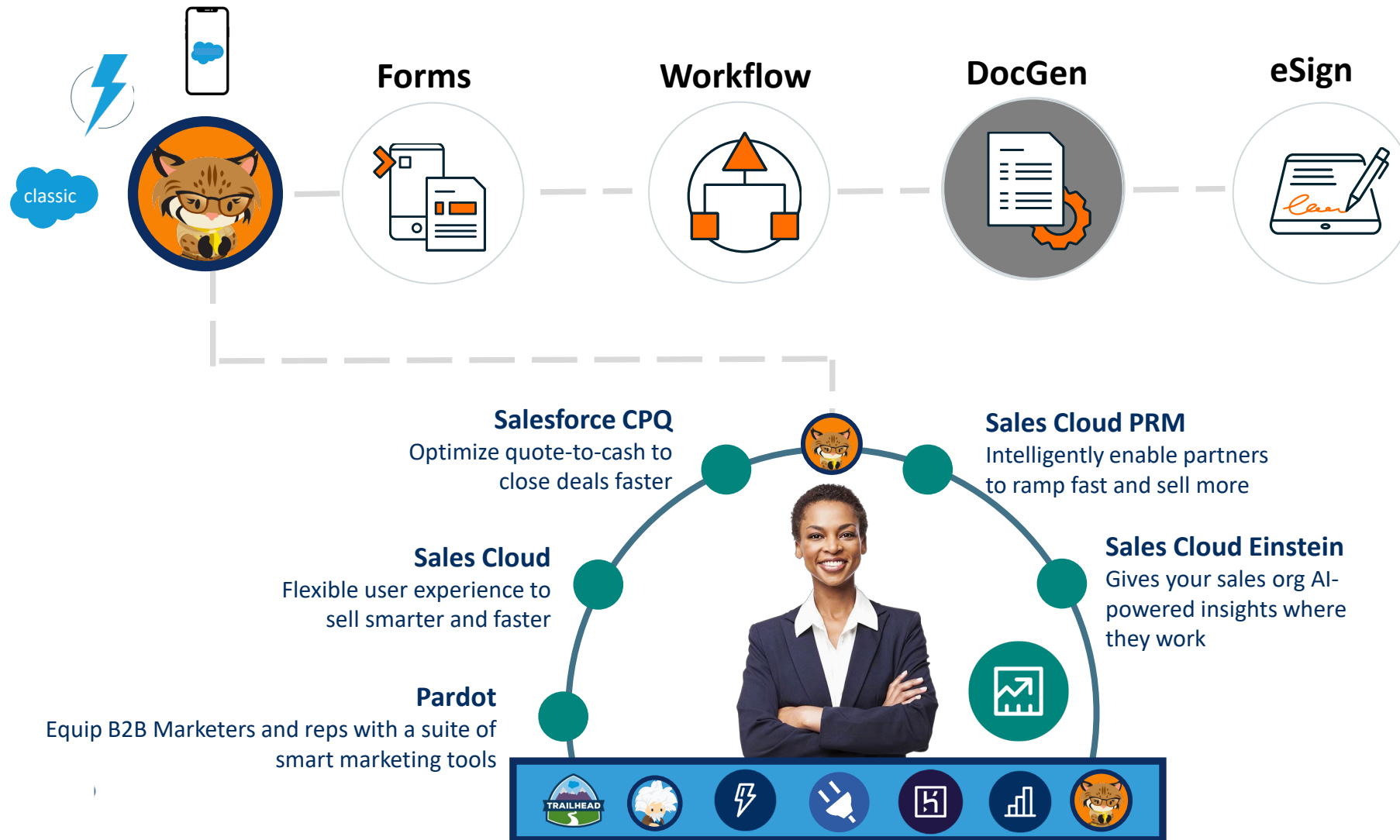applications
in production

Billions
of executions annually

Nintex Process Platform

Manage → **Automate** → **Optimize**

Forms
Collect any data on any device

Advanced Workflow and Bots
No-code process build and trained bots

Share
Distribute plans, workflow updates, documents to any device

DocGen & eSign
Create and complete any document

Map
Design, structure, and visualize

Monitor & Analyze
Maintain and improve any process

Plan
Collaborate on process build

AI for Process
Scale through intelligent design and process refinement

Classic · Lightning · Mobile

🟠 **Live AppExchange listing**

⚪ **Not yet listed on AppExchange**

Nintex Process Platform

Forms → **Workflow** → **DocGen** → **eSign**

classic

nintex Drawloop DocGen

DocGen AppExchange listing:

4.9 Average Rating
300+ Reviews

Salesforce CPQ
Optimize quote-to-cash to close deals faster

Sales Cloud PRM
Intelligently enable partners to ramp fast and sell more

Sales Cloud
Flexible user experience to sell smarter and faster

Sales Cloud Einstein
Gives your sales org AI-powered insights where they work

Pardot
Equip B2B Marketers and reps with a suite of smart marketing tools

Why Drawloop DocGen?

Extended Document Generation Landscape

- eSign
- CLM
- HTML Tagger

Drawloop DocGen

- No code/ Built on Force.com
- Conditional business logic
- One template, many versions
- Multiple language support
- Customer success

RadixBay®
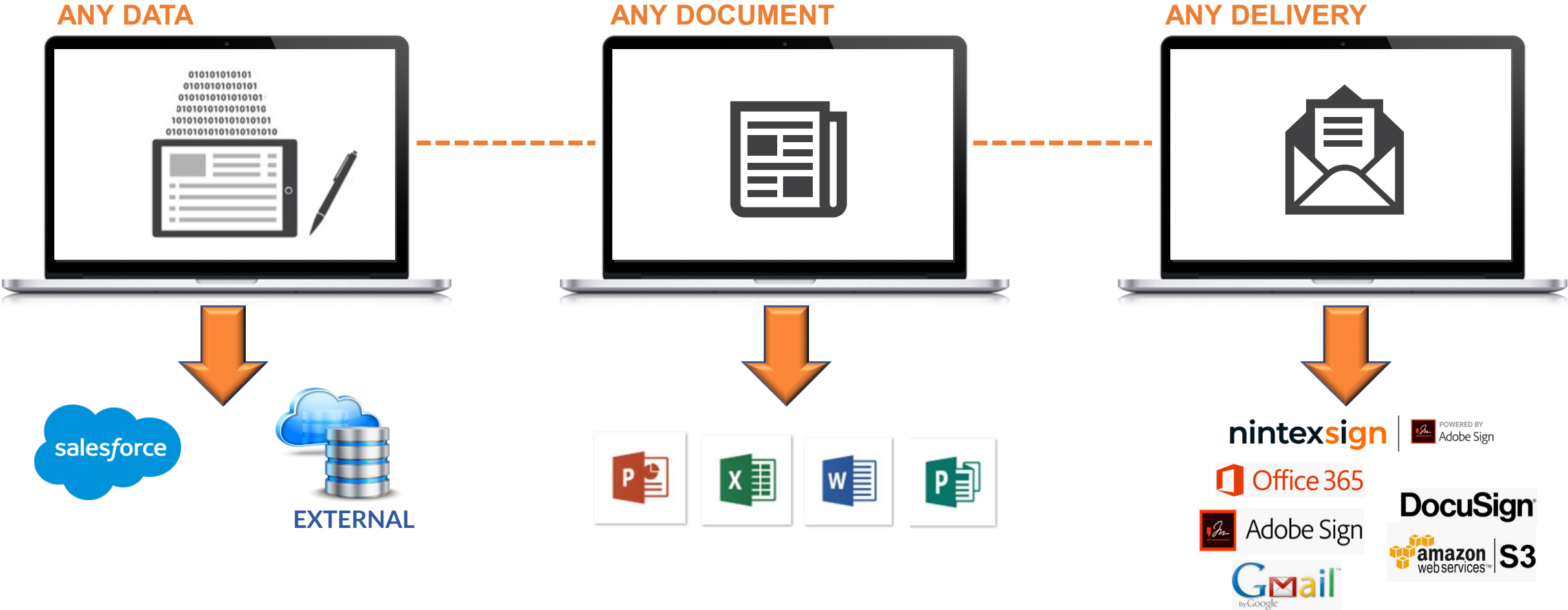
Nintex Demo Use Cases

Use Case #1 - Contracts:

Legal wants to give the ability to allow end users to use approved fallback terms while still maintaining control over quality. They also want an easy way to maintain a repository of updated templates.

Use Case #2- Tear Sheets:

A single paged document used to summarize key information about accounts or contacts.

Legal/Contracts

Counterparty returns redlined version

Legal must approve/provide new terms or language
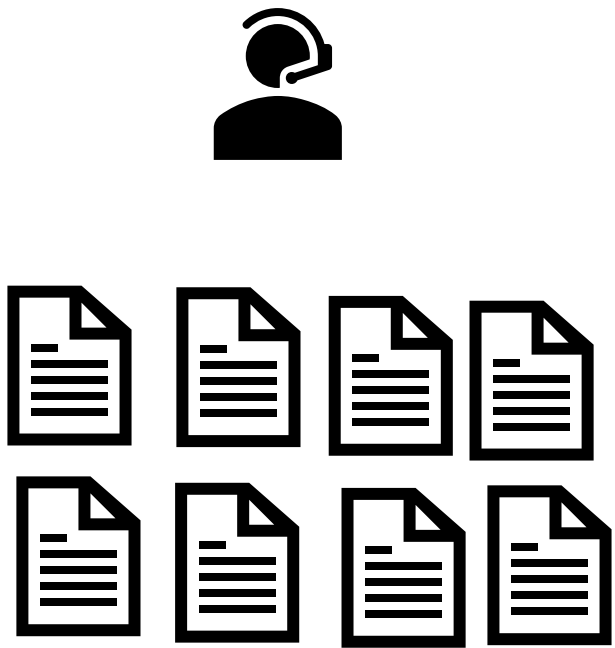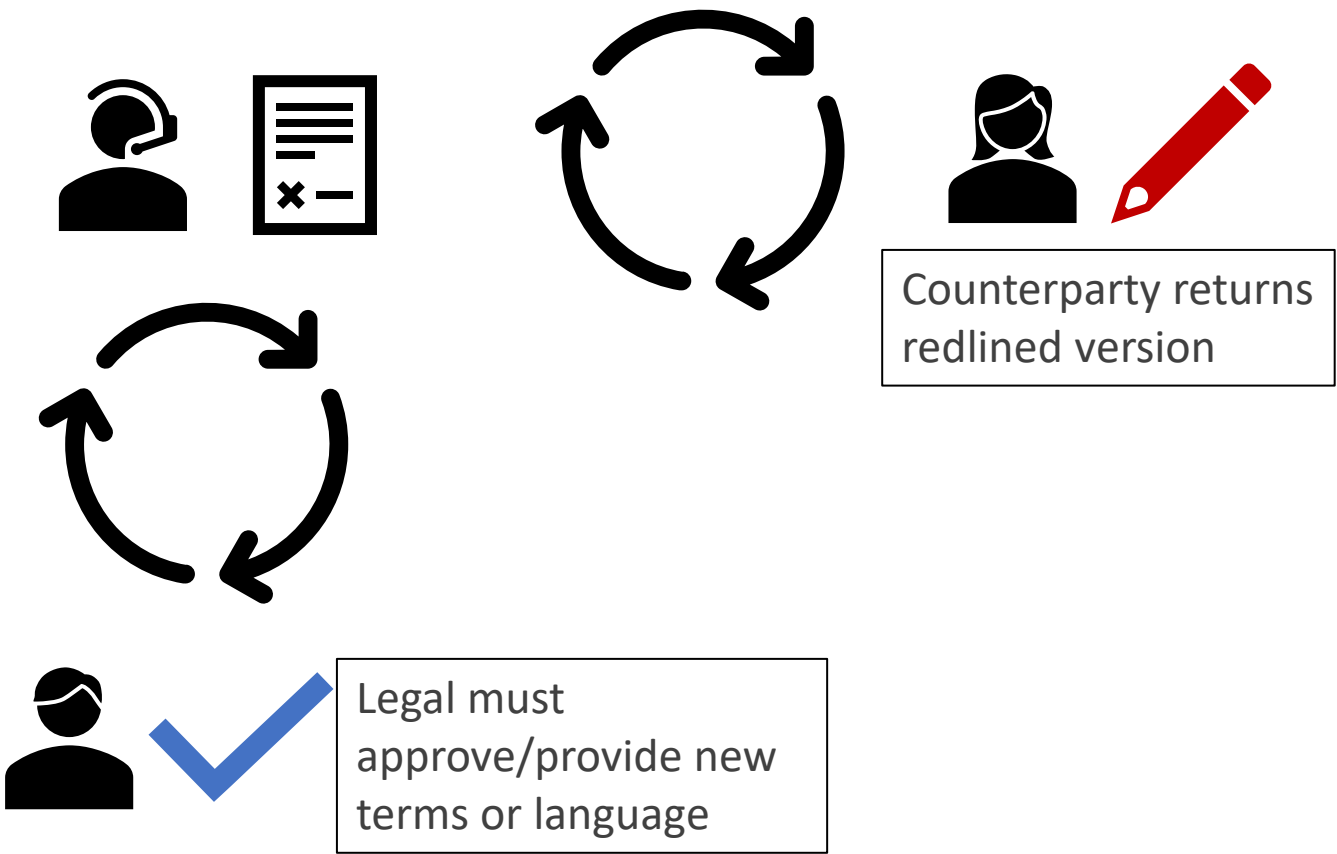
- Manual
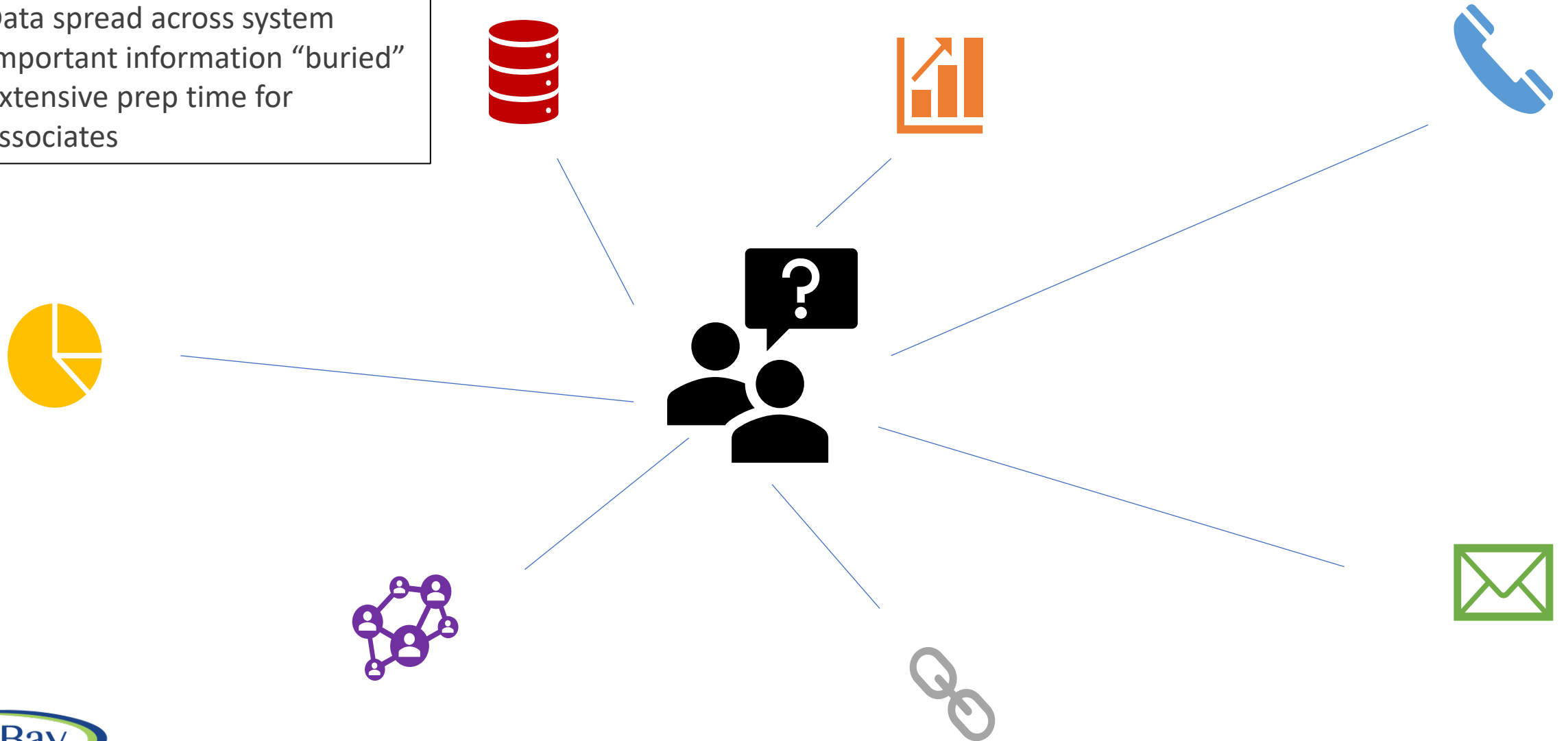- Risk of templates being outdated/out of sync
- Work intensive for legal

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Tear Sheets

- Data spread across system
- Important information "buried"
- Extensive prep time for associates

Architecture – What to Think About?

- Data model

- Goals/ Objectives

- Licensing requirements

- How to call our service
  - Process Builder
  - Lightning Flow
  - Apex
  - Button push

- Trigger vs. user generated

Q&A, Wrap-Up And Next Steps

Thanks from the RadixBay Team!

Interested in a free 1hr Consultation? Please contact RadixBay at info@radixbay.com

Or

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