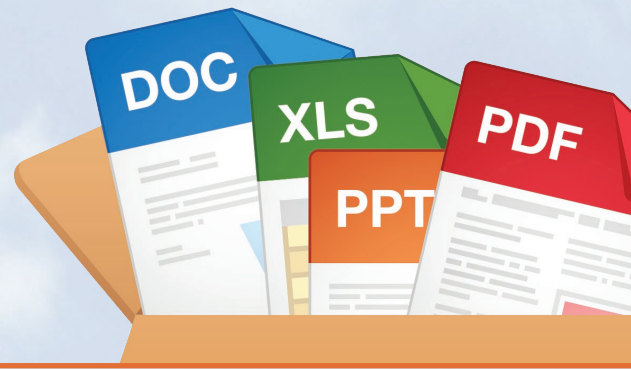




Three Types of Documents Every Organization Should Automate



How Document Generation Eliminates Administrative Tasks so You Can Focus on Revenue-Generating Opportunities

Generating documents should be a repeatable process not a repeatable task. There's nothing more frustrating than having to manually recreate the same set of documents with data that already sits in Salesforce. Sure you can leverage a document template on your desktop or even the last one created (fingers crossed it's up-to-date!), but you still have to pull, export, or worse yet, search for the data to manually update the documents.

Drawloop transforms the manual task of generating documents into an automated business process. With Drawloop, you will never download or edit an individual document.

Document generation as a service drives Salesforce adoption and quality data. Pre-packaged document templates are accessed in Salesforce and dynamically customized based on your CRM data. The result is a Dynamic Document Package (DDP).

While the list of documents your organization can automate is endless, the three categories below outline the power of Salesforce and Drawloop's document generation solution providing a significant return to your organization.

Customer-facing Documents

Common Use Cases: Quotes, Contracts, Proposals, RFP, NDA, MSA, Order, EULA, RFQ

Drawloop streamlines all customer-facing document packages for any organization. No longer do you have to manually cut and paste your Salesforce data into your documents. Drawloop dynamically merges this data into pre-loaded document templates in Salesforce and generates a single, highly customized document package based on information like territory, customer information, products purchased and legal requirements.



- **Capture products and pricing data from Salesforce** and format product line items by groupings, bundles, or a specified order regardless of the data object model.
- **Verify and validate Salesforce data** and require data appending via an automated form when required data is missing.
- **Create a secure workflow process** that includes business rules around meeting data criteria in order to generate documents on-demand.
- **Dynamically include or exclude customized agreement clauses** based on data stored in Salesforce.
- **Dynamically include product datasheets** in the document package based on product line items assigned to an opportunity, contract, or order.
- **Route the final document package to third-party services** for eSignature, document management, or storage from Salesforce.

Internal Business Reviews

Common Use Cases: Quarterly Business Reviews, Commission Reports, Opportunity Pipeline Reports, Revenue Reports, Financial Forecasting, Inventory Reports, Activity Logs, Project Summaries, Risk Reports

Drawloop also automates one of the largest administrative tasks for any organization – generating critical reports for internal review. Whether it's a quarterly state of the union or commission report, Drawloop captures data from Salesforce and/or external web services for the purpose of internal review. With literally a click of a button in Salesforce, the data is visualized and 'massaged' into a branded and professional output file that can be easily interpreted by business leadership.

- **Consolidate multiple Salesforce Reports** into a single document output.
- **Dynamically create charts that represent numeric values stored in Salesforce** to visualize quarterly sales progress, revenue sources, employee activities, sales forecasts, commission breakdowns, and inventory status.
- **Capture data from any external web service** or data platform that hosts inventory or commission data, example: external SAP or ERP.
- **Leverage Microsoft Excel as middleware to run calculations** on data captured from Salesforce and/or an external platform for forecasting sales or future revenue.
- **Schedule the distribution of reports** to a recipient list on a daily, weekly, monthly, quarterly or annual basis.

Customer Consumption

Common Use Cases: Account Plan Summaries, Consumption Reports, Candidate Profiles, Applications, Activity Reports, Channel Distribution Reviews

Outside of customer-facing and internal documents, Drawloop also generates documents that report on customer consumption. Consumption files provide a customer with a snapshot of the amount of services they utilize so they can determine the value they receive from their purchases.

- **Allow customers to generate documents on-demand** through a web service or portal.
- **Dynamically produce charts** that visualize metrics stored inside of Salesforce and/or an external platform.
- **Dynamically consolidate and tailor documents** packages by leverage data from Salesforce and/or an external web service .
- **Initiate document generation from a Salesforce workflow rule or Apex code.**
- **Utilize Apex code to specify criteria needed for a Salesforce contact or user to be included on a distribution list.**
- **Leverage Microsoft Excel as middleware to run calculations** on data captured from Salesforce and/or an external platform for updating consumption metrics.

The Drawloop Difference

Consistency

- Create a replicable process across your entire organization
- Present a consistent brand – look and message – to prospects and customers
- Standardize content, versions, and document formats while including completely customized account, sales, pricing and product data

Productivity

- Automate creating documents in one environment
- Turn around documents faster than ever
- Reduce time devoted to administrative tasks
- Service customers more efficiently
- Increase mobility and ability to create and send documents anywhere
- Integrate with other cloud services like electronic signatures

Accuracy

- Increase Salesforce data compliance and adoption
- Remove subjectivity from sales forecasts
- Improve customer and deal visibility
- Ensure sales reps close deals within sales parameters
- Simplify training

About Drawloop

Drawloop fundamentally changes the way documents are created during the sales and service process by allowing you to dynamically merge any Salesforce data into any combination of document templates (Word, Excel, PPT, PDF, etc), via a Dynamic Document Package (DDP). By creating and managing all of your sales and service documents in Salesforce, you eliminate manual processes, increase accuracy and compliance, while still leveraging existing business logic and workflow rules.

Available on



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