

MITRATECH

TAP into Salesforce with Workflow Automation

TAP WorkflowAutomation



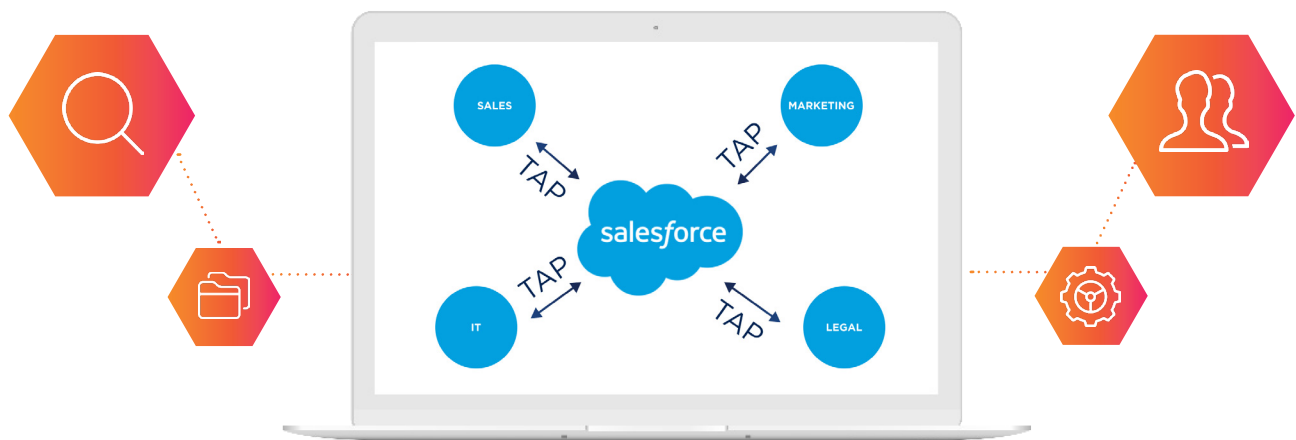
TAP into Salesforce

salesforce

TAP WorkflowAutomation

Leverage the full power of Salesforce for your organization, customers, vendors, and partners with TAP, Mitrastech's workflow automation solution. In 15 minutes or less, connect your Salesforce account so your team can recall, collect, update and create records without ever opening Salesforce. Conversely, your sales team can request assets from marketing, legal, procurement, and the rest of the organization without leaving an opportunity or account page in Salesforce. Embedded, empower users to:

- ◆ Search for Salesforce records (accounts, opportunities, contacts, etc.)
- ◆ Populate other Salesforce assets from the lookup field
- ◆ Create new Salesforce records
- ◆ Update existing Salesforce records



“ TAP is the linking thread between Salesforce and the sales team, and the sales team to the rest of the org. Our reps spend most of their days in Salesforce, so TAP’s integration makes it a one-stop-shop for them— a place for self-service.”

KRISTINA RODRIGUEZ | Director of Revenue Operations

Transforming Business Processes

Platform Benefits

Access From Anywhere: Allow sales, customers, and vendors to submit forms that are updated automatically in Salesforce without login or SFDC licensing.

Reduce Expenses: Reduce the total costs of licensing, BizApps and IT hours, infrastructure requirements, and the upkeep of homegrown solutions or complex configurations.

Fast, simple form completion: Auto-populated fields for contract or document generation make it easy to share business-critical information to account managers, sales reps, or legal.

Better Compliance: Track and monitor every transaction— across every workflow— with audit trails that live forever to drive compliance.

Easy to create TAP's drag-and-drop designer enables teams to automate the processes that matter most to them for faster time-to-value and increased ROI.

Easy to use: While web forms are accessible across devices, built-in record tracking, notifications, required fields, and escalations keep all parties informed of the subsequent actions.

Flexibility and scalability: Respond quickly to changing needs with an agile designer, enabling iterative design and implementation.

Data-driven decision making: Create custom reports, provide visibility and transparency across your organization, see workloads, and reassign or escalate cases based on your company's unique needs.

Secure data sharing: Mitratesch's cloud-based platform ensures secure encryption and scalability— from any mobile or desktop device— with:

- Industry-leading certifications
- HIPAA
- SOC2
- PCI
- PII
- ISO27001

How to Connect:

TAP has an out-of-the-box Salesforce connector accessible to administrators. Setup is done through “connected apps” in sfdc and takes about 15 minutes.



TAP Use Cases

Sales Legal Portal

Empower your sales team with the tools they need to close deals faster. With TAP, users can submit contracts directly from a Salesforce opportunity or account and process them through to legal, IT, and managers with far greater speed while minimizing errors, delays, and costs..

Marketing Request Portal

Align your sales and marketing with a collateral request portal built directly into Salesforce. Request and obtain advertising and communications materials such as ads, case studies, sales collateral, and more..

RFP Intake

Deeply integrate your Salesforce and RFP process to complete intakes quickly and accurately. Pull required fields directly into TAP for document creation and completion while eliminating back-and-forth conversations and human error.

CSAT/Support Survey

Kick off customer and support satisfaction surveys with TAP during and after service engagements with built-in escalations for unhappy customers and actionable feedback.

New Vendor Onboarding

Track, triage, and automate vendor onboarding to reduce costs and minimize errors that can lead to improperly onboarded vendors. Standardize the process across your organization and manage risk through auditability and security..

Contracts Portal

Manage contracts through Salesforce and across your entire organization. TAP accelerates the routing, reviewing, and approval of contracts for both internal and external parties while eliminating costly mistakes and bottlenecks. The result? Exceptional consistency, compliance, speed, and ROI.