



**Customate.Business**  
implement simply • change easily • automate completely



# Customate Rapid Business Process Automation Platform for Business Users

*For the Business,  
By the Business*

# What are we trying to achieve with Customate Platform?

**We felicitate businesses to perform better and constantly improve by letting each business –**

- Custom-automate the processes of the entire organization seamlessly with very little in time and money
- Easily modify the systems anytime to accommodate business changes and future plans
- Automate every process big or small in every corner of the organization
- Keep focus on processes by having the process/functional folks build and change the systems on their own (without any IT)
- Connect with the Customate systems in the ecosystem with a click of a button

**Only SaaS platform in the world that allows business or process people to create an end-to-end custom software automating businesses process, totally on their own, and, to modify it continuously as processes improve or business changes.**



## Why?

In today's day and age of exponential technological leaps and of large scale disintermediation, one area which has still gone without any major upheaval is in the domain of business process automation and management using software.

Such software is either ready-made with options to configure and/or customize, or, totally custom programmed. In any case, however, the business is totally dependent on in-house or outsourced IT teams and/or product service providers. There is almost nothing that business can accomplish on their own.

Digging deeper, it becomes clear that the need of IT services for every business

process automation exercise only adds to time and cost, not least because of the added management overheads.

This added cost can be reduced to the benefit of either the companies or service providers or both.

Often, in order to keep these costs low, businesses take the unhealthy path of keeping customization to its lowest acceptable level. In effect, for its employees it means change of years of established processes in order to match the standardized software. This leads to failure of many such projects to automate businesses (failure rates in excess of 1 in every 4 projects).

**So, is there  
a better  
solution to  
this problem?**

Customate Platform has been developed under the premise that businesses value custom solutions to automate their unique ways of working (processes) and they will like to do it quickly, easily and, spending as little as possible.

The platform has been totally designed by a business person and hence is meant for a business, functional or process professional to create end to end custom software automating business processes easily and in quick time – at least 10 times cheaper and faster.

Customate postulates that automation should not be an end in itself but a recurring exercise to increase productivity/efficiency and to reduce waste/mistakes by improving and changing working practices continuously.

Note, the focus ought to be on optimized processes and their continuous improvement, and, automation of the same should itself happen almost automatically. That is only possible if there exists a tool that very easily allows automation and changes to the same, without any significant cost attached to it.

# What is Customate Platform?

It's a very simple tool for non-technical process/functional people to create complete end to end software automating business processes. It's simple because it has only one screen where all the work is done – no separate screen for form design or rules engine or workflow design or database design.

If one were to think about it, when business people think and then compile business requirements document for a process with many linked stages, they do so one stage (in a process) at a time where everything related to that stage is recorded. Fields, rules, workflow, DB – all intermingle with each other in one holistic manner.

However, when these requirements are taken up for development by technical folks, they would slice them laterally along artificial and boundaries like DB, WF, Rules, Form etc all along the entire set of the requirements, almost like one would slice a cake from top to bottom (a layer at a time).

This process is not only counter intuitive but makes it imperative to have people with expertise from different areas involved – functional, database, frontend, server

and middleware programming etc. It also adds manufactured overheads of mistakes, breakages, coordination, documentation, management etc.

– all of which ultimately add the time and resources needed – all ultimately translating to higher costs.

In contrast, it's exactly the holistic nature of Customate Platform, with just one screen for everything, that lets the non-technical person to automate her own business requirements in a manner similar to how the requirements were envisaged and transcribed in the first place.

Moreover, business people are often familiar with use of functions and conditional statements (if-then-else) in spreadsheets. We have used the same modus operandi in Customate – so the whole process is highly intuitive and familiar to the business person.

Given the familiarity of the platform and its WYSIWG feature, one can easily figure out where one has to make the changes that need to be made and if something is wrong, where that mistake could be located and fixed.

# What makes it so flexible and how are changes possible even in future when products built on it are in use?

As stated above, the simplicity and the ease of knowing intuitively where to work makes the making changes very easy. But, how is it possible for non-technical people to make drastic changes, even those in database structure and even after the product is in use and already has many records, without breaking anything and without any IT involvement? Its where the unique design of our product and the use of no-sql databases come into play.

No-sql databases are databases that do not require any stringent definitions to tables or columns to function. In fact, different records in the same table can have different structures. Hence, they are able to take changes and are still able to handle it.

# What are the features of the platform, what can a trained business person achieve?

The platform is designed for all of it – everything – to be used by a trained business person. The talks of a single screen that works in intuitive ways might convey an impression that the platform is meant for simple automations. However, there can be nothing further from the truth. The platform is indeed for all kinds of complex real-life situations. And the business person can do it on her own.

To cover complexities, our business person should be able to convey complex ideas to the system. This is done using another familiar tool – functions. All those who have used Excel are aware of functions. In the platform, using the familiar functions and if/then statements, any business person can capture any complexity. Of course, she can also create her own functions as well.

Creating products on the platform is so simple that its often easier to work in an agile manner and build software in collaboration with the users – repeatedly using and changing till they are satisfied. It's often better to actually build it like custom programming but at the speed and cost of readymade programming. This way of working can really replace implementation woes and stress with the sweet feeling of success and achievement.

## The key features that a business person can inculcate in her project created on the platform :-

High level of Automation based on Rules	Alerts and Escalations
Tasks and Assignments	Document Storage/Sharing
Comprehensive Searchability	Reports/Intelligence
Visual Reports	Printable Formatted Reports
Internal Communication	Email linking

# Can different products on the platform be integrated with each other or with another software?

The great thing about the platform is that applications made on it can be integrated with each other at a click of a button. In fact, it is permission based and if admin of one gives admin of another permission to connect, it can be done right away in a few seconds.

This obviates the need for companies to automate themselves end to end in one big project. Separate small groups could do it in a way that works for them and then connect with one another as per their need. This could again take a lot of stress out of implementation. No more end to end requirements and no more different groups coming to the same page – every small group could work independently as per their need and then shake hands with others.

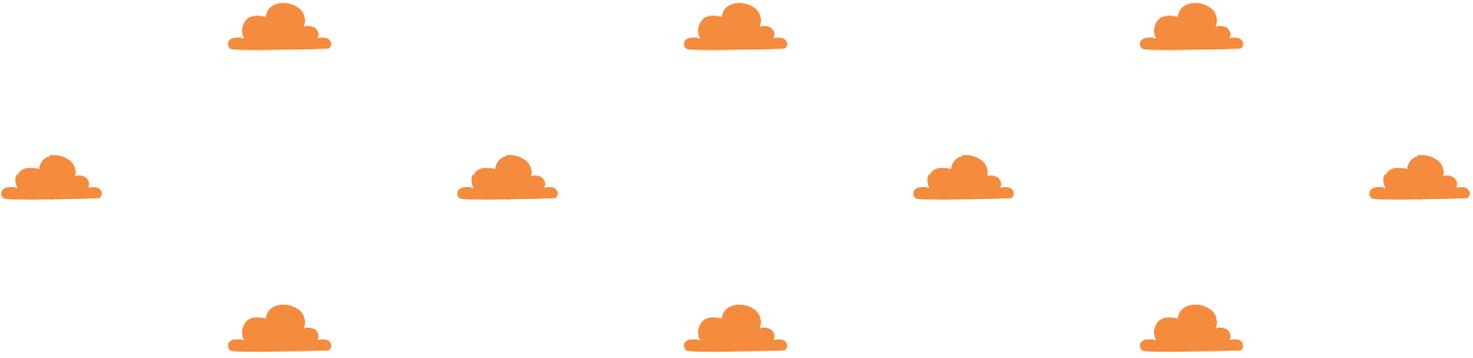
In order to integrate with other products, we have built API's that can be easily used.

**So, what kind of architecture of the platform makes all this possible?**

Customate platform has a highly modular architecture. There is a Designer Studio that allows creation of software in form of metadata. This metadata is stored in a sql database. The metadata is like a blueprint of the designed software and the application engine will just use this metadata independently (of the designer studio).

Customate is, like any SaaS model, a multi-tenant system with a major difference – the data base is separate for each project. Despite being a multi-tenant system, that is one software instance can run many customer projects, it is designed in a way such that multiple instances of the software can run the same project. Thus, when a user in India could be running a project that is running on a code instance on an India server, at the exact same time a user in US could be working on the same project running in another instance on a US server (they will both be working of the common database for that project).

The product has been built in Java and JS/ JQuery. The data is all stored in Mongo DB. As of now, the platform is hosted on Amazon Web Services (AWS) infrastructure as a service.



## Data Safety

Data is all stored in separate projectwise databases in AWS. All AWS security features can be enabled as needed.

As stated earlier, every project has its own database and hence there is no possibility of data leakage between projects (of different companies). In fact, individual customers can have their own databases in AWS and hence can have total control of their data.

All data travels encrypted over internet - our products are accessed via secure https url which is Comodo ISSL certified.

For even more security, if needed, the data can also be stored in an encrypted manner.

## Access Security

In Customate platform access can be given based on roles as well as to individuals. Access can be controlled down to individual fields or even records (filtered based on rules).

Passwords are stored and compared in encrypted form and hence not accessible to anyone in their original form.

# Use Cases

## Bygging Inventory

The company has 2 manufacturing units where they make hydraulic jacks and a turnover of over 50 cr.

They use a lot of different items, especially steel products like rods, pipes and plates. They had been looking at a lot of inventory software solutions with one aim in mind – to be able to track this steel material in various units of measurement. They would receive the raw material in random lengths (each batch could have various lengths) and then they would cut them into pieces of specific lengths as per the jack model. So, they wanted to be able to track the material in terms of pieces, meters and kgs at each point in the shop floor and store.

We also automated their assembly of products in such a way that they only had to specify the number of units of each product assembled and automatically the required raw material will be deducted for the stock – of course, if the required material was less to begin with, the user would be made aware of the disparity.

All this as part of the entire inventory management software.

Took one non-technical person 3 weeks to complete.

## Vinayak Tubes Sales

Another customer of ours had some unique requirements. It's a fairly large stockiest and trader of steel pipes and tubes. Turnover of close to 100 cr.

They have a very small team and wanted a CRM solution for their quotation department where they do not need to fill forms but reply directly by email. They also had companies like Thermax, Alfa Laval etc that would send them enquiries in excel format and demanded quotations back in the same excel sheet.

So, we created a solution for them where directly Enquiry records could be created simply by forwarding enquiry emails to a specified email address created for this purpose. The record would have the text of the email in one of the fields and any attachments would be attached to the email itself.

While forwarding, the forwarder could write at the top of the email the name of the sales person to whom this enquiry ought to become available, along with any price or instructions as needed. This sales person will get a notification/task and the enquiry will be accessible only to her for quoting purposes.



This sales person could then do one of the following as needed –

1. create a reply email directly in the system and send the quote to the party
2. could download the spreadsheet attachment, fill up the prices as per customer instructions and reattach the spreadsheet to the quotation record and forward as email to the party
3. fill up details from the email in the quotation form and create a full pdf form

This was all part of the CRM where they could end with booking an order. Now we are building them an inventory management software to help with servicing these orders and manage the inventory.

Took one non-technical person 2 weeks to complete.

## NGO Automation

A firm consulting NGO's approached us to create a product for the NGO's automating their program-wise functioning as there was nothing like that in the market.

We created a software where –

- Various programs could be created with specific durations and assigned to various program managers
- Budgets for each program with the month or quarter-wise break-up at budget head and sub-head levels for the duration of the program
- Promised and actual contribution and contributors for the program again at the same time-wise break up as the program itself.
- Purchase plan for the actual items/ material to be purchased against each budget breakup across various time slots.
- Purchase reminders/alerts and Auto Requisition
- Comparative statements and Auto Purchase Orders
- Issues
- Keeping track of the inventory

Took one non-technical person 2-3 weeks to complete.



## Intermind

Our web designing company that's an IT company wanted a Order management software to

- Keep track of the orders, delivery and payment milestones
- Create invoices as per the payment milestones
- Monitor payments
- Monitor GST compliance and storing payment challans
- Monitor TDS deductions from their payments and reconcile with customer filings

Took 2 days to build this software.

## Bluefeather

A small follow up system for a company that needs to have its lead generating people to constantly make cold calls and follow up with potential customers.

Took 2 days make.