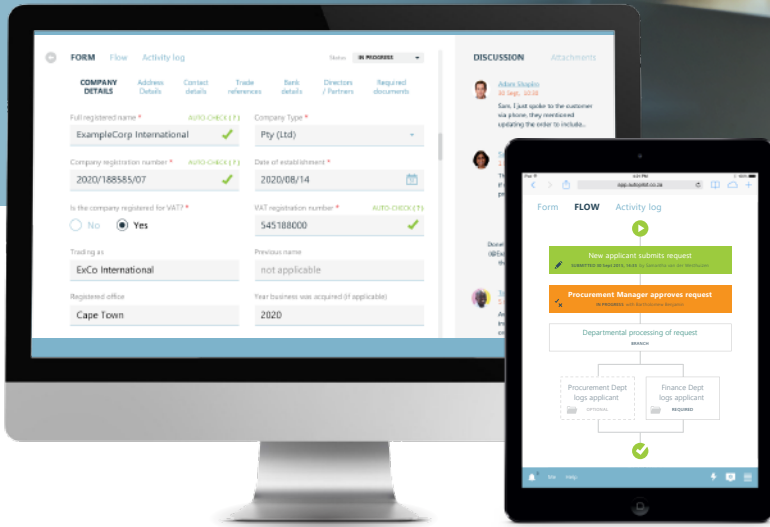


Customer Signup with less fuss and more flow

Autopilot



The most cost effective solution in the market for **Customer Onboarding automation.**



Radically reduce past procurement pains



UPDATING SPREADSHEETS



MANAGING STEPS VIA EMAIL



FINDING THE RIGHT PDF'S



PILES OF PAPERWORK



EXPLAINING. REPEATING.



Turn *effort* into *efficient*



AUTO-POPULATED DIGITAL FORMS



COLLABORATIVE WORKFLOWS



E-SIGNATURES - NO PRINTING



CLEAN, VALID DATA - NO PAPERWORK



BUILT-IN GUIDANCE - 80% LESS CORRESPONDENCE

SIGNUP AND APPROVAL PROCESS AUTOMATION

Easier. Faster. Clearer. Consistent.



SETUP *instantly*

Activate preset processes & quickly customise, or create your own.



COLLECT *efficiently*

Smart-forms make data clear and clean, and automated steps makes things move, hands-free.



VERIFY *seamlessly*

Instant auto-check company or ID data against official sources like banks or utility providers.



SIGN *digitally*

with accountability and transparent audit trails. No need for pen and paper.



PROCESS *automagically*

Finished and 'filed' with consistent actions and reliable records.



COMPANY DETAILS	Address Details	Contact details	Trade references	Bank details	Directors / Partners	Rec doc
Full registered name *	AUTO-CHECK (1)	Company Type *				
ExampleCorp International	✓	Pty (Ltd)				
Company registration number *	AUTO-CHECK (1)	Date of establishment *				
2020/188585/07	✓	2020/08/14				
Is the company registered for VAT? *		VAT registration number *	AUTO-CHECK (1)			
<input type="radio"/> No <input checked="" type="radio"/> Yes		545188000				
Trading as		Company name				
ExCo International		Applicable				
Registered office		Business was acquired (if applicable)				
Cape Town						

WHY AUTOPILOT

Built for less hassle and better results

Data verification result: NOT PASSED

- ID number lookup: ✓
- Bank account validation: ✗
- The captured surname (H) does not match the surname linked to the ID number (SHARRIP): ⚠

> Check / correct your data

AUTO-VERIFICATION

Configure processes to seamlessly connect with official identity sources to **AUTO-INSERT OR AUTO-VALIDATE CUSTOMER DATA:**

- Bank account verification
- Company data verification
- Credit checks
- Other customized options

Autopilot <IT-155855-918186520@diverply.autopilot>
 Subject: SageOne Request for Sage One
 Approved on: 13 Jun 2024, 11:23

SIR 0001-20160301: Approval required for Sage One
 Bartholomew Benjamin has indicated that the task needs to be completed by 24 Jun 2024.

Review and complete the task in Autopilot

TASK & EMAIL INTEGRATION

Integrates with your task and email systems to **ENABLE AUTOMATED, HANDS-FREE MESSAGING AND MOMENTUM IN YOUR ONBOARDING PROCESSES.**

Notifications, reminders and confirmations make sure everyone knows what actions are complete or what needs to happen next.

MONITOR Report Initiate

Requests in progress (33) | Open tasks (41)

Document approvals (5) | Adam S (9)

Employee onboarding (2) | Bartholomew B (0)

Leave requests (3) | Hannes B (2)

Purchase requisitions (5) | Lynda H (6)

Quote requests (7) | Samantha vd W (3)

Support requests (2) | Zamani M (0)

Filters: Process type, Status, ON COURSE, AWAITING FEES, Urgent, Overdue

REPORTING DASHBOARDS

Highly configurable and scalable Reporting dashboard, for **INSTANT OVERVIEW OR INSIGHTS INTO EVERYTHING GOING ON.**

Finally a simple, single source for Monitoring and Managing all customer applications and progress in each process.

PUT YOUR PROCUREMENT ON AUTOPILOT

Works wherever and *however* you need it to.



GREAT TO USE

Simple enough to start.
More powerful as you
progress.



MOBILE READY

Works seamlessly
across your devices to
keep business flowing,
wherever you are.



CLOUD-BASED

No custom hardware.
No expensive enterprise
installations. Fully secure,
backed-up storage.
Access anywhere.



SUSTAINABLY PRICED

No more paying for what
you don't use. Monthly
transactional billing allows
you to scale up or scale
down with business needs.



"(using Autopilot) We have had a massive reduction in the time it takes to onboard our customers, dropping from 10 days to less than 2 days. So, from a service delivery standpoint, Autopilot has had a huge impact. In the past with our manual process, our team was terrified of making mistakes. Now, we thrive on the level of service we can provide."

RYAN MARTYN
SYNTECH DISTRIBUTION (PTY) LTD.

View the full story via tinyurl.com/AP-syntech

AUTOMATE BUSINESS TODAY

TransFORM your Customer Onboarding processes
and make ~~work~~ business FLOW

