

Drawloop Automates Contract Generation and Complex Routing Process for Online Media Company

Challenge

Apartments.com offers online advertising listings to thousands of professionally-managed apartment communities and properties nationwide that want to reach renters. While they used Salesforce to manage their customer database, an increasing number of sales representatives were manually creating contracts. As a result, the internal process of routing contracts from sales representatives to operations to order entry and fulfillment became less inefficient and cumbersome.

Solution

Knowing they needed to find a solution that automated both the contract creation process and workflow, the Director of Operations at Apartments.com decided to work with Drawloop after extensive research and evaluation of all the options available on the Salesforce AppExchange. In a short amount of time, Drawloop stood out from the competition for its intuitive set-up wizard and data merge tools, as well as its seamless and native integration with Salesforce.

Results

Deploying Drawloop's LOOP Document Services and integrating it with Salesforce had an immediate impact for Apartments.com, automating the once manual routing process from start to finish. As a result, the Apartments.com sales team can do their jobs more efficiently and effectively with access to pre-populate forms with customer data and the ability to customize each contract to a specific property and pricing structure. Data validity and compliance has also significantly increased, which ultimately benefits the entire organization.



Drawloop Out Performs Competition for Ease of Use and Integration with Salesforce

Apartments.com is an online one-stop resource for apartment hunters, wherever they are in the renting lifecycle. With property reviews and articles with tips for moving in and making the most of the apartment living experience, and millions of detailed apartment listings, Apartments.com provides the best-of-breed tools for consumers. The company sells online listings to apartment communities and management companies



Industry:

Online Advertising / Media Sales

DDP Use Case:

Contracts

Company Overview:

Apartments.com is a leading national apartment Internet listing subscription service with more than 50,000 unique addresses representing millions of rental units from managed properties, newspaper classifieds and for-rent-by-owner properties. By incorporating the most relevant products to reach renters including personalized searches and highly visual ads featuring live chat, real-time rent, online video walk-through demonstrations, consumer reviews, professional photography, a responsive website and apps for iPhone, Android and tablets, Apartments.com creates easy access to its listings.

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Ben Roewe,

Director of Operations
for Apartments.com

across the country that are targeting ready-to-rent shoppers. With more than 18,000 apartment listings representing millions of apartments, the process for creating contracts was labor intensive for everyone involved.

The paper-based contract and manual-routing process was inefficient and resource-intensive.

In 2012, Ben Roewe, Director of Operations for Apartments.com, decided to work with Drawloop after extensive research and evaluation of all the options available on the Salesforce AppExchange. Drawloop quickly stood out from the competition for its intuitive set-up wizard and data merge tools, as well as its seamless and native integration with Salesforce.

One feature in particular impressed Ben – Drawloop’s field tagger functionality. In order to merge data between the document automation app and Salesforce, a template needs to be created. The Drawloop field tagger identifies the Salesforce object and its field format, and dynamically generates a field tag that can easily be copied and pasted into the merge template. With the competitive app, you have to export an excel file of all Salesforce fields. The fields are dropped into excel horizontally instead of vertically which meant searching through up to 500 columns for the right field tag.

In the end, choosing LOOP Document Services was an easy decision for Ben.

“It was obvious that the Drawloop team is document automation and Salesforce subject matter experts,” said Ben. “LOOP feels completely native to Salesforce and even when I do need assistance, their customer service is outstanding.”

Apartments.com Saves Time, Resources and Improves Data Quality with Drawloop

During the Drawloop deployment, Apartments.com took the opportunity to simplify their contracts in addition to automating their document process. Prior to Drawloop, Apartments.com used a three-page contract.

In order to leverage dynamically merging data between LOOP Document Services and Salesforce, the Apartments.com

operations team discarded the fulfillment form and converted it into a table that expanded based on the number of properties being added. The first page of the contract is now a summary and the third page dynamically contains the fulfillment table that includes a separate line for each individual property and the associated products and pricing.

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Apartments.com has sales employees generating contracts via Drawloop LOOP Plus across the country. When a sales representative closes a deal, they can now effortlessly complete a Salesforce opportunity record and captures the high-level information. Working for this information, the sales representative can build cases for each fulfillment, which are pre-populated based on the account information. Then, LOOP dynamically pulls and merges the information from the opportunity, to generate the contract. The finalized contract is attached to the Salesforce opportunity, completing the cycle.

“We now have qualitative and quantitative



data that shows a significant savings of time and resources by automating our document process with Drawloop,” said Ben Roewe of Apartments.com.

In addition to efficiencies, Apartments.com has seen a significant increase in both data quality and compliance since it is all captured and pulled directly from Salesforce. The sales team has embraced the new process with enthusiasm, appreciating how much time is saved with this new automated contract-generating process.

Apartments.com continues to evolve their use of LOOP Document Services and values its flexibility and simplicity, allowing them to modify, add or remove fields as business needs change.



What is a DDP™?

A Dynamic Document Package (DDP) is the tangible output of LOOP Document Services and the end deliverable sent to anyone at anytime. A DDP is a single packaged asset comprised of one or more different document types - Word, Excel, PowerPoint or PDF - that are dynamically merged with Salesforce data. The set of documents are the same native ones currently used during the sales or service process, except now they reside in Salesforce.

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.



For more information

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