



General Introduction Demonstration

Who we are

Decisions delivers a no-code, rules-driven approach to business process automation.

- Founded 2010
- World Headquarters in Chesapeake, VA, Global Operations Center in Hyderabad, India, UK, Australia, and Singapore
- 210+ Employees
- Profitable since 2015
- Aldrich Capital Partners investment in 2019
- 44 Partners
- 235+ Customers in 22 countries



Our Customers

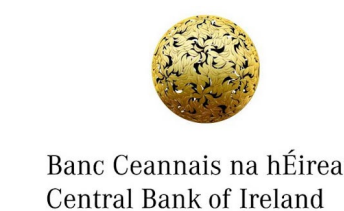
HEALTHCARE



FINANCIAL SERVICES & INSURANCE



GOV



OTHER

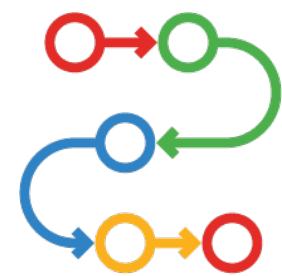




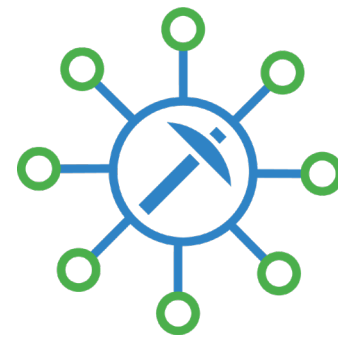
Decisions Features



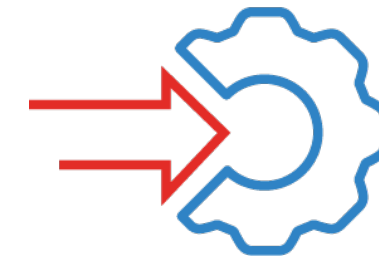
RULES ENGINE



WORKFLOW
MANAGER



MINING
AGENTS

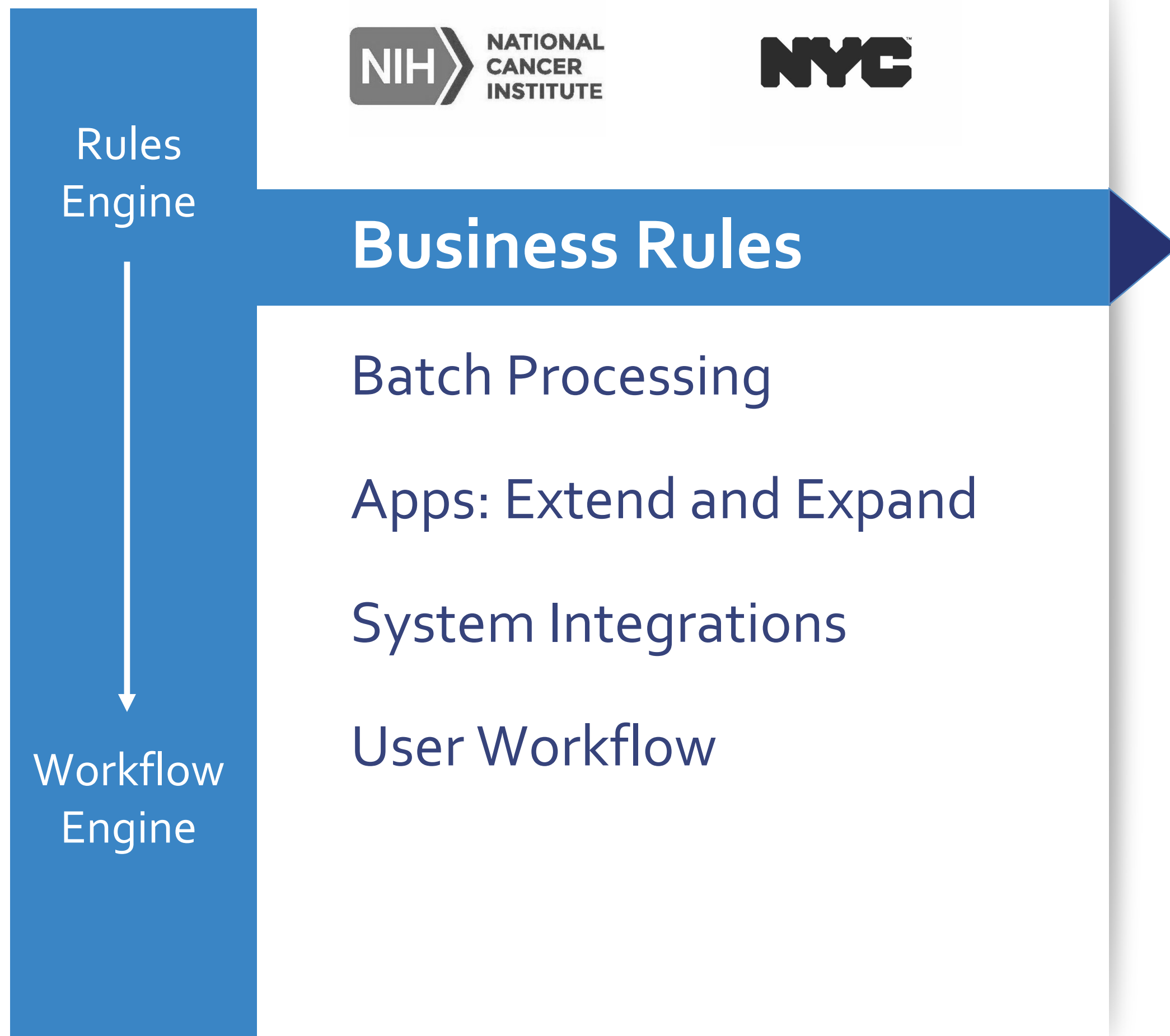


INTEGRATIONS



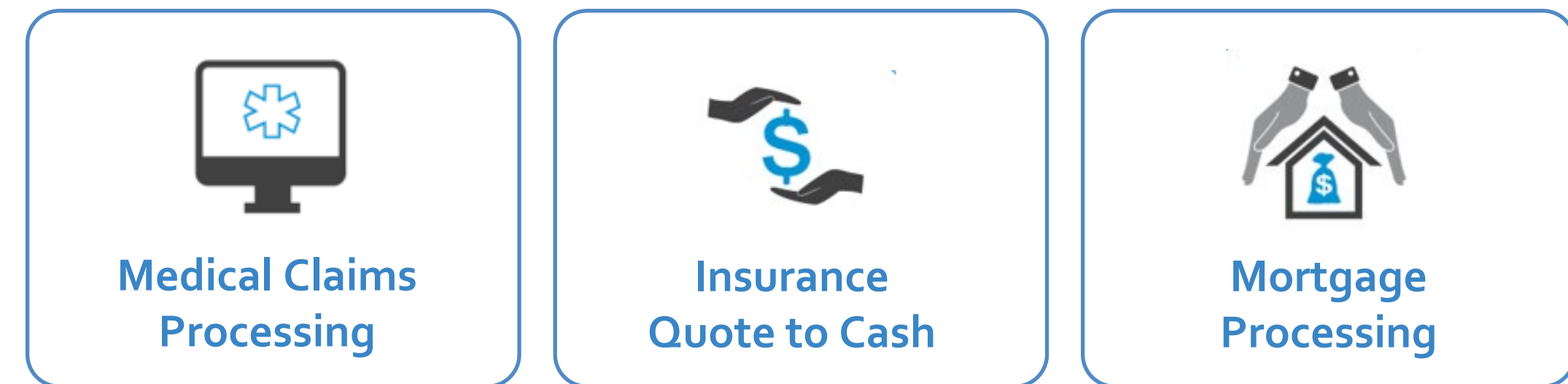
INTERFACE
DESIGNER

Automate with Decisions

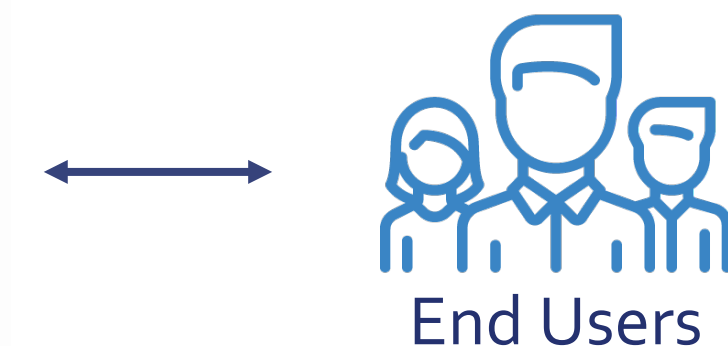


Centralize Logic & Rules

Expose logic and simplify rule authoring, while managing permissions.

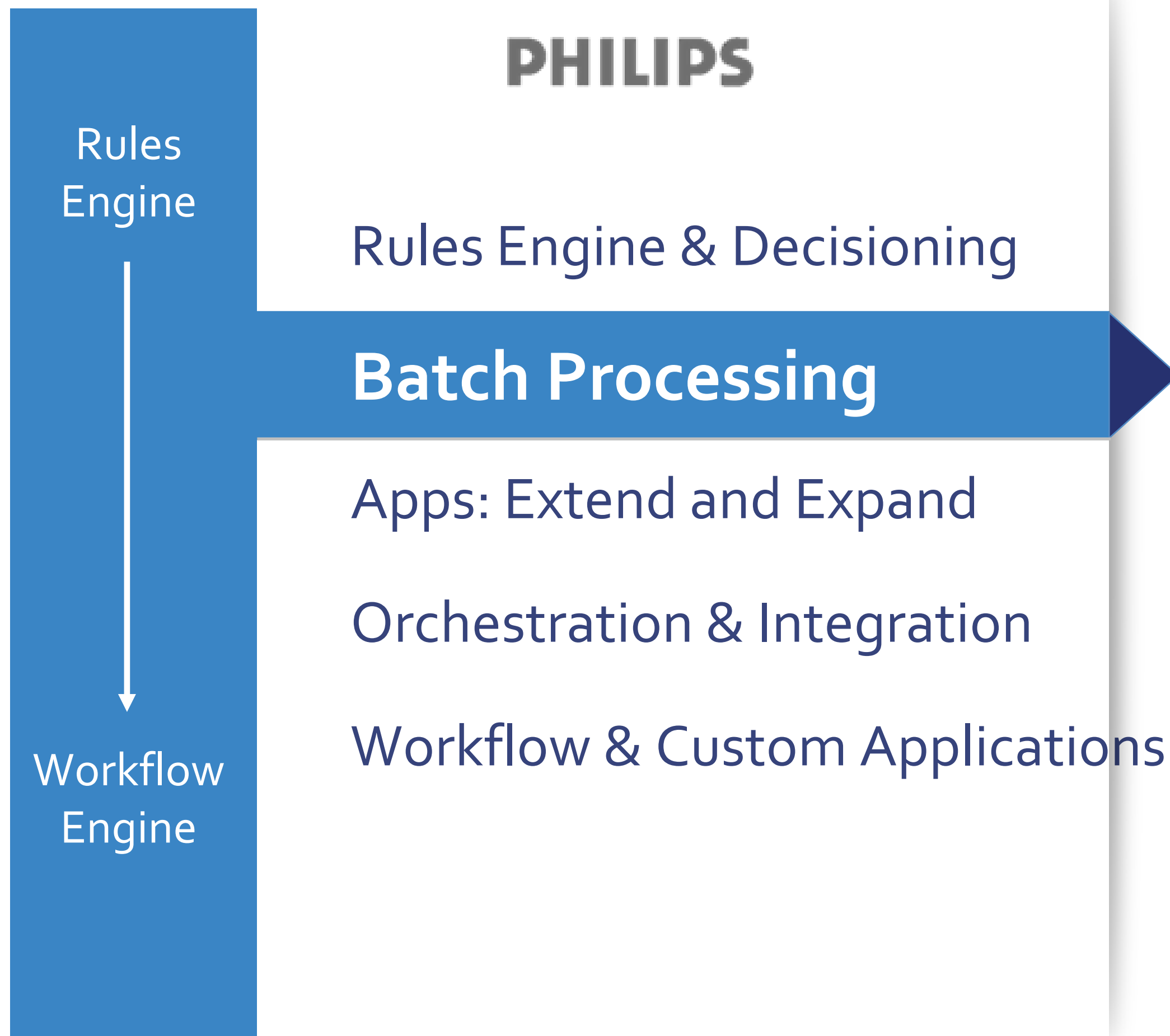


Policy Application.AddressState In List	NOT Policy Application.InstrumentType Contains	Histo
VA, FL, IL, PA, CA, NC, SC, DC	Guitar
DE, AK, NE, TX, AL	Drums
HI, AK	Other	5000
OH, TN, NY, GA	Piano
GA, NC, CA	Violin	0 and
Click To Add Row		



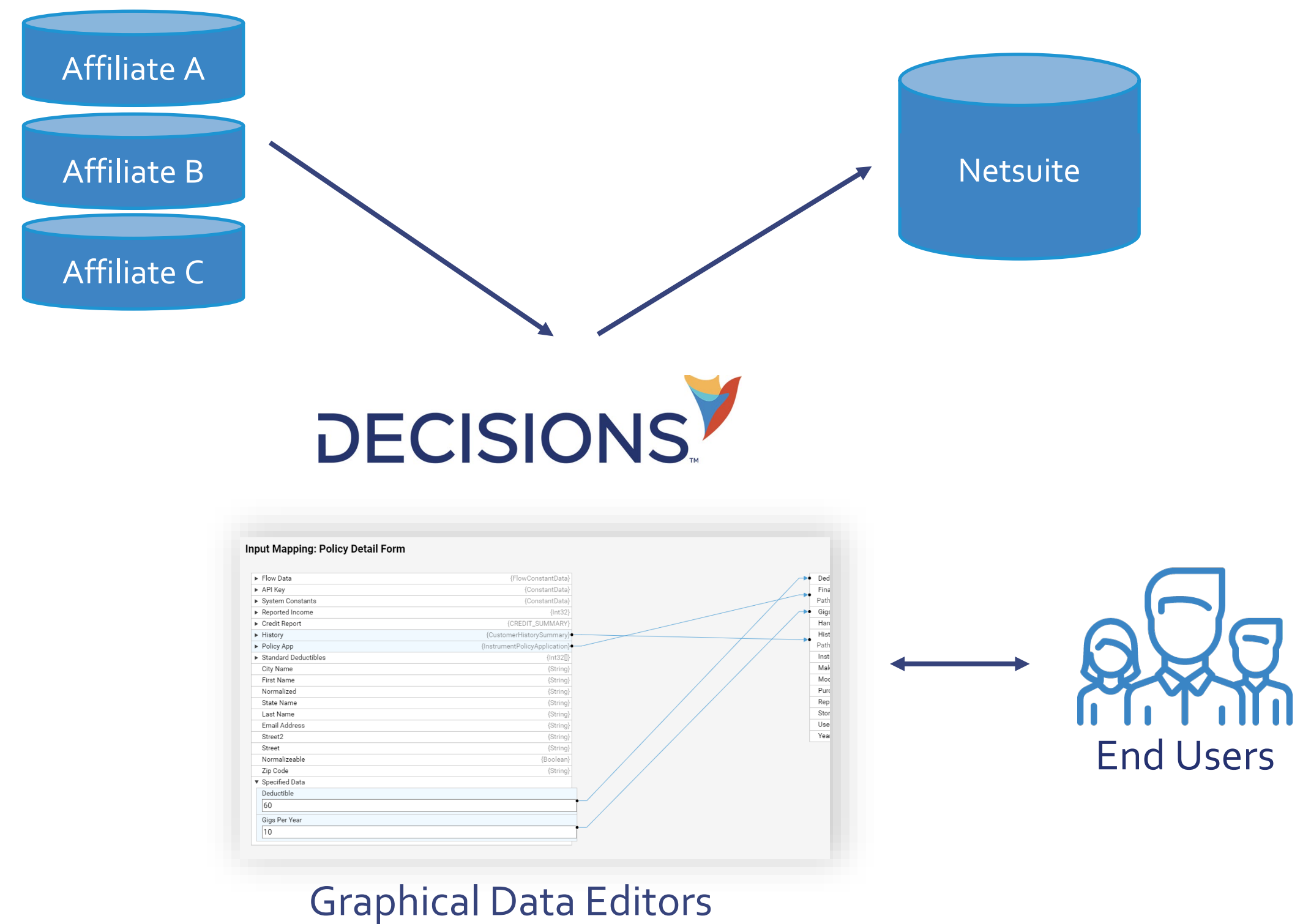
Graphical Rules Editors

Automate with Decisions

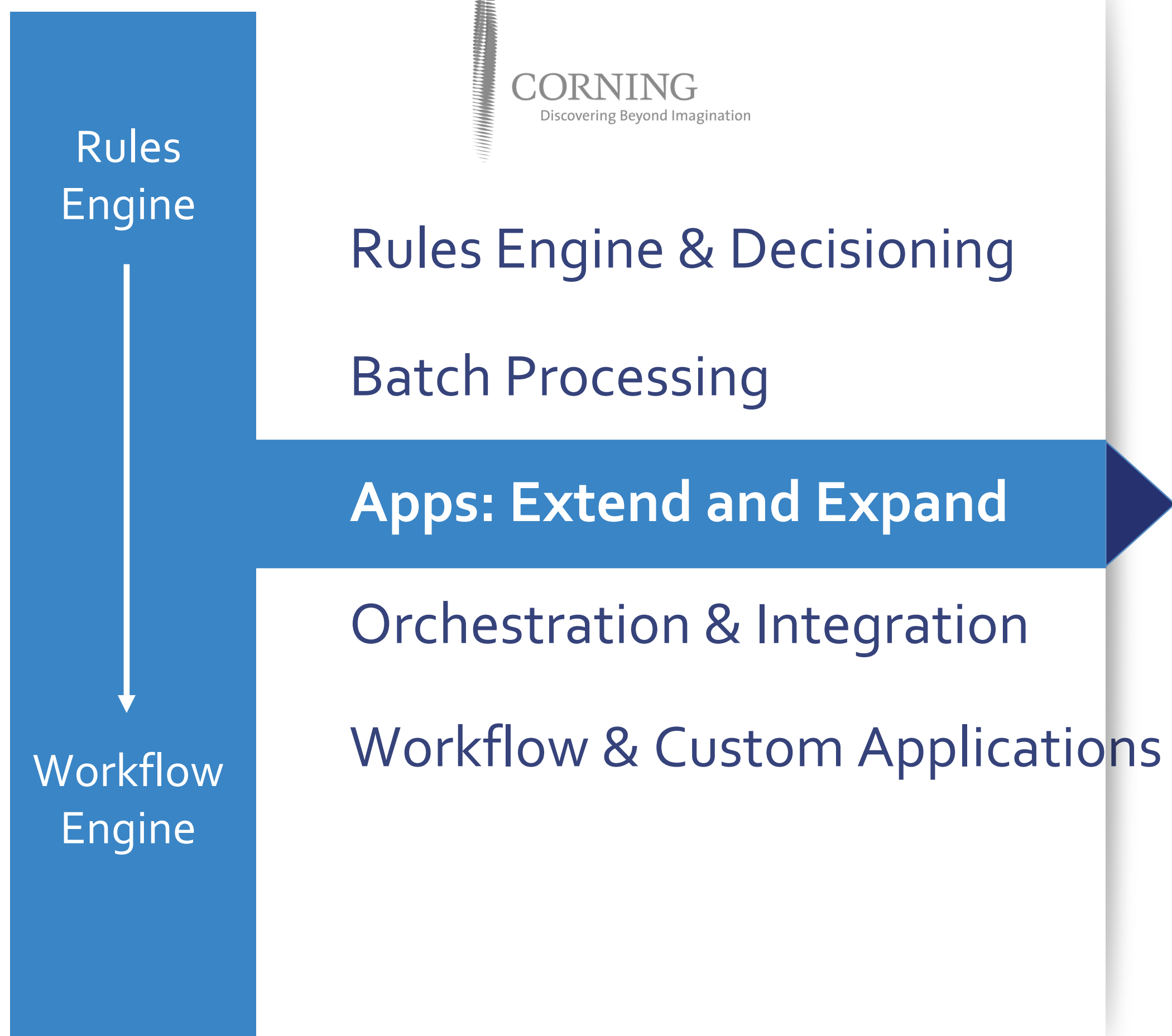


Data Mapping & Transformation

Convert and migrate data into XML, EDI, HL7 with enterprise level performance.

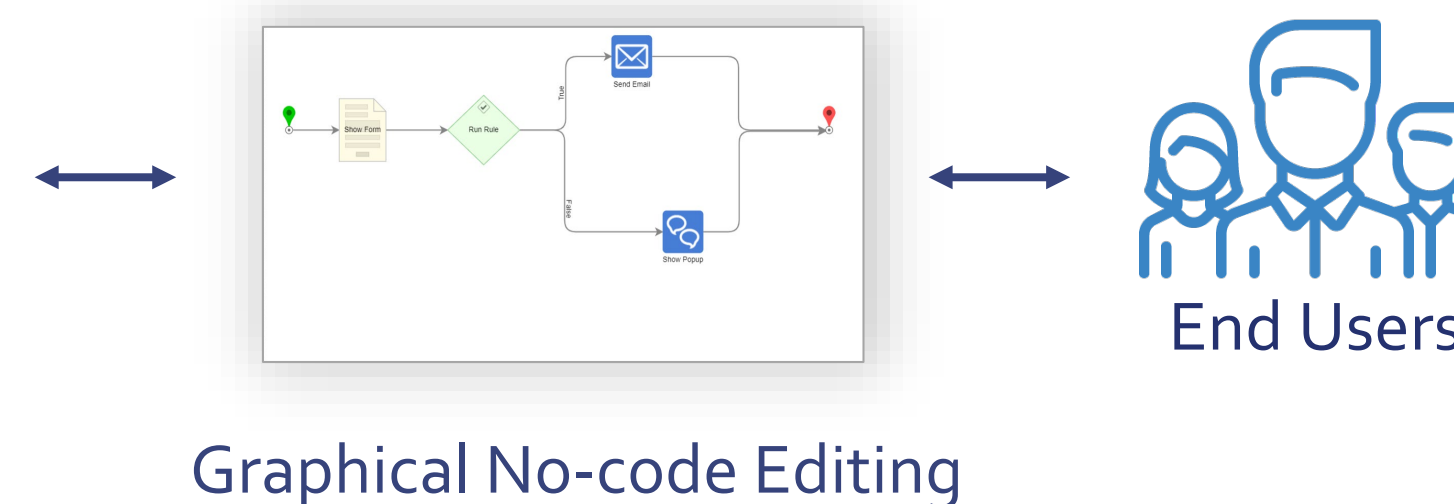


Automate with Decisions

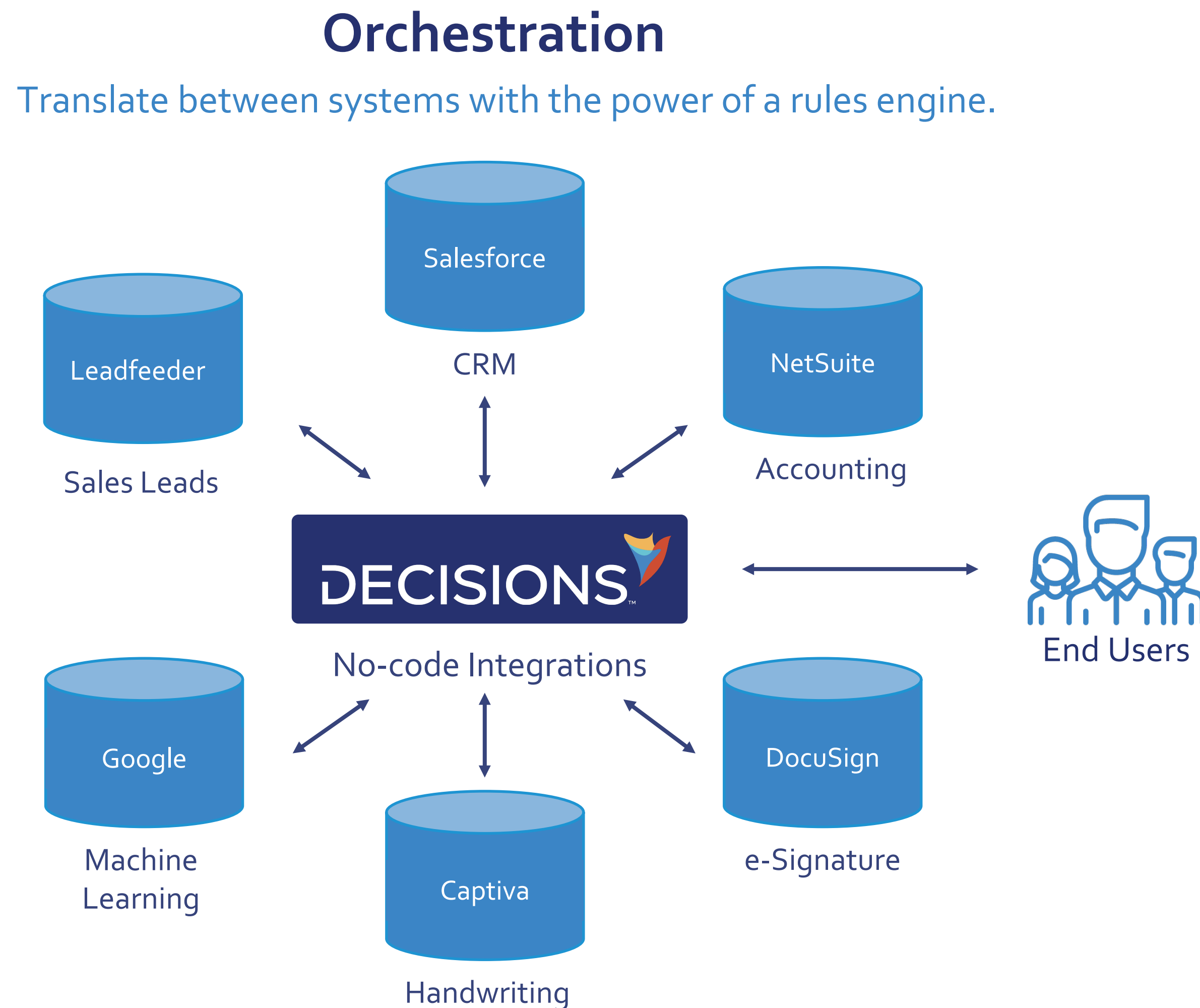
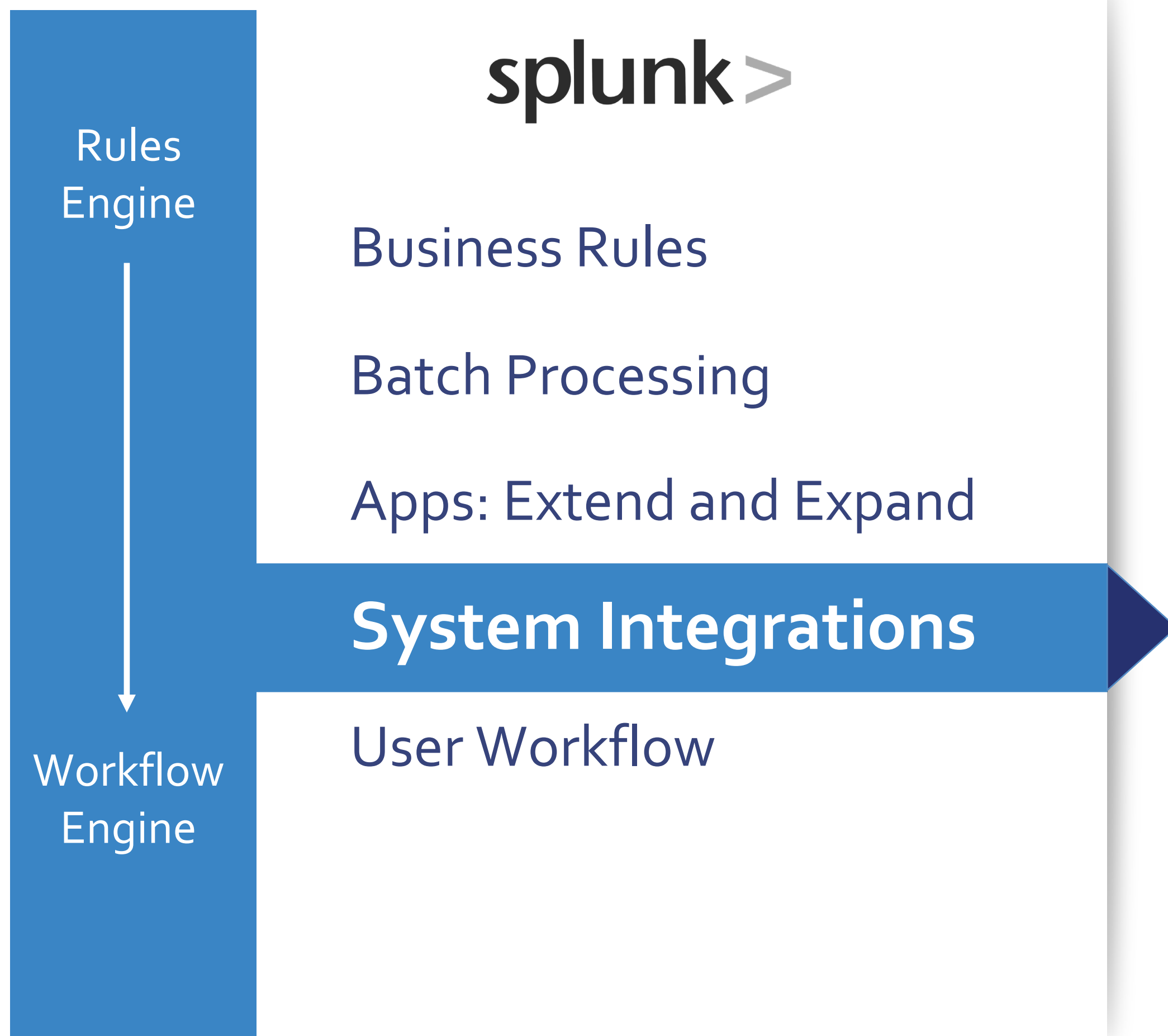


Special Processes

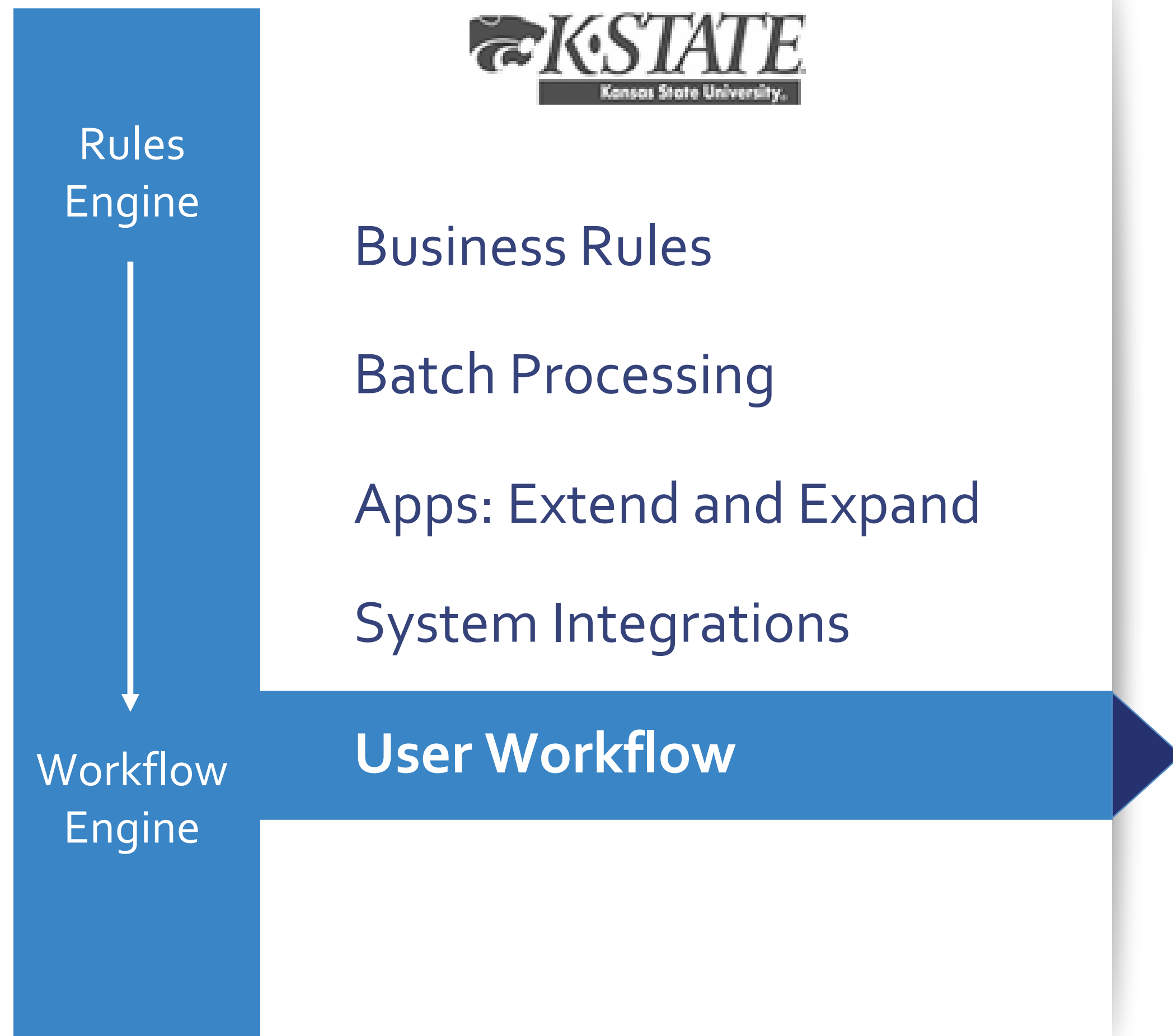
Leverage the speed of no-code to expand existing solutions with customized processes for pricing, packaging, marketing, master data management, shipping, segments, and tax.



Automate with Decisions

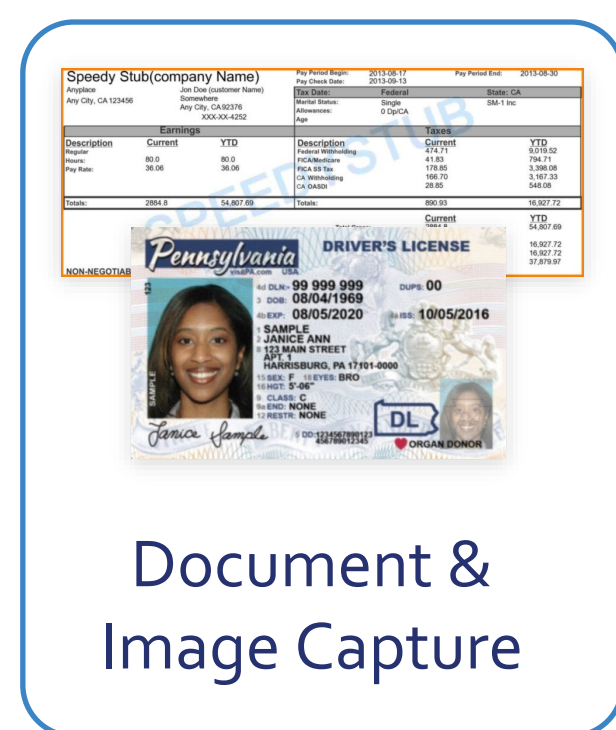
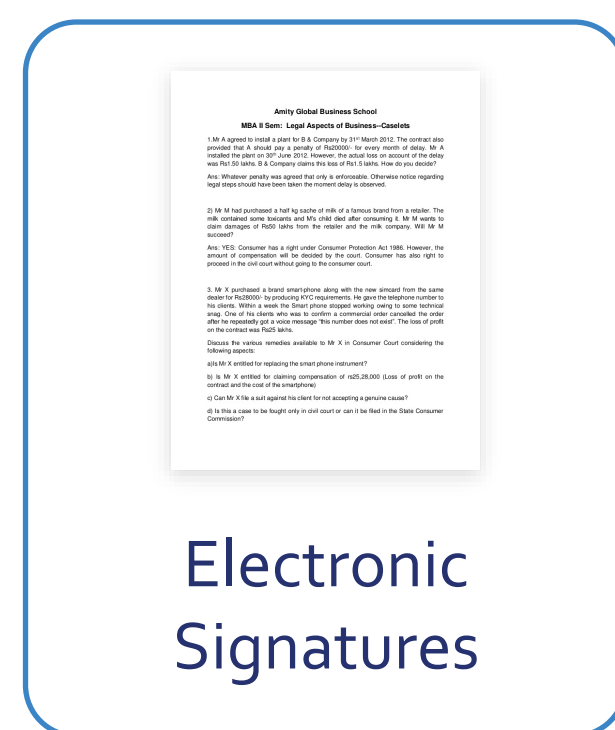
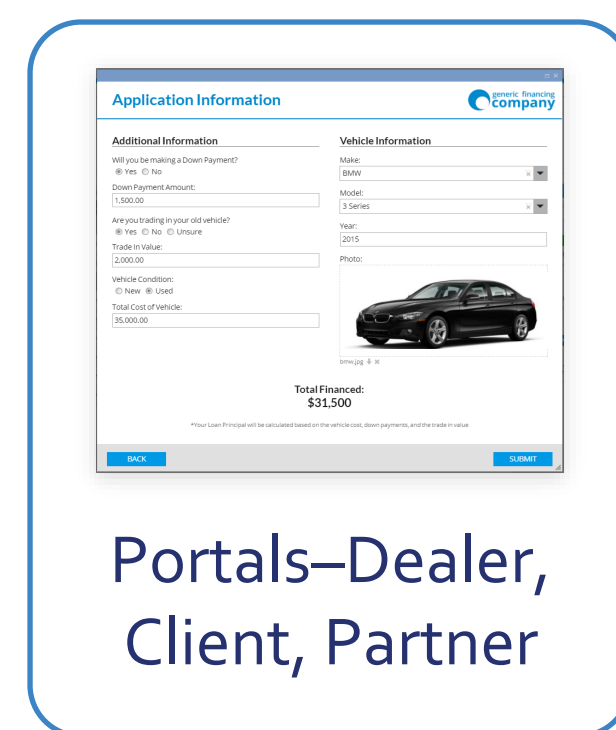
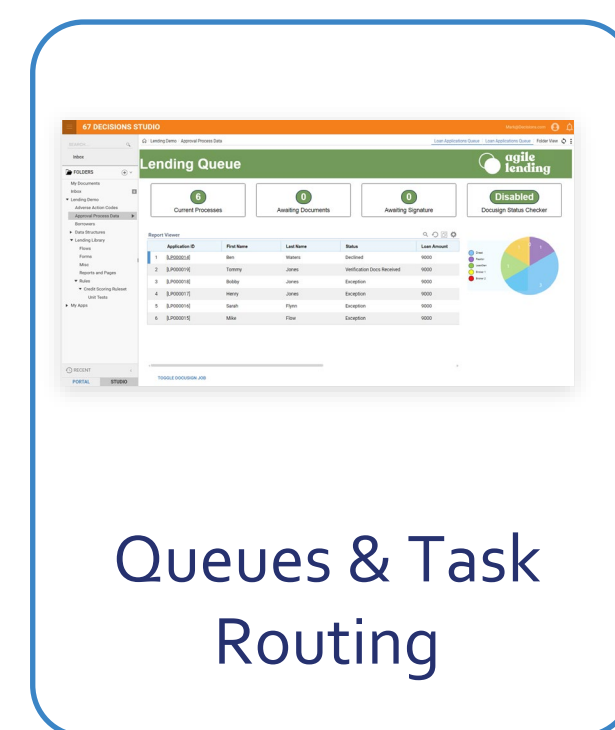
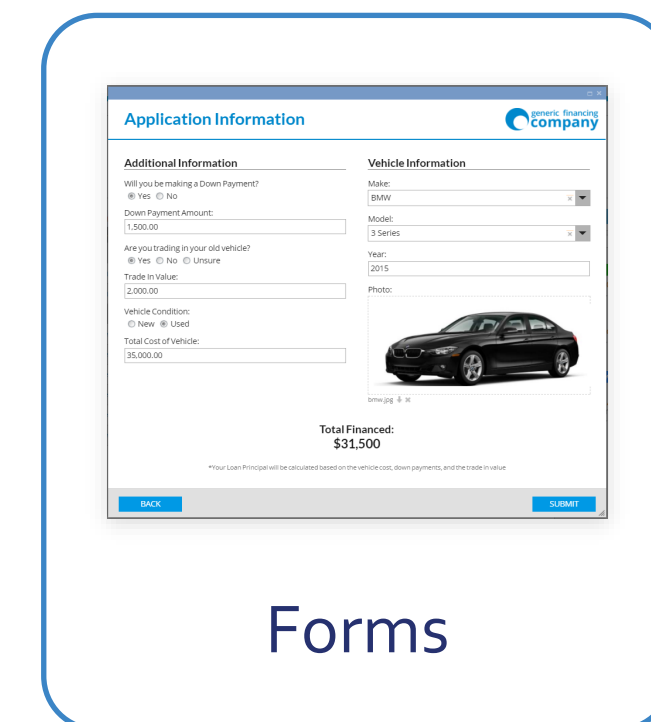


Automate with Decisions

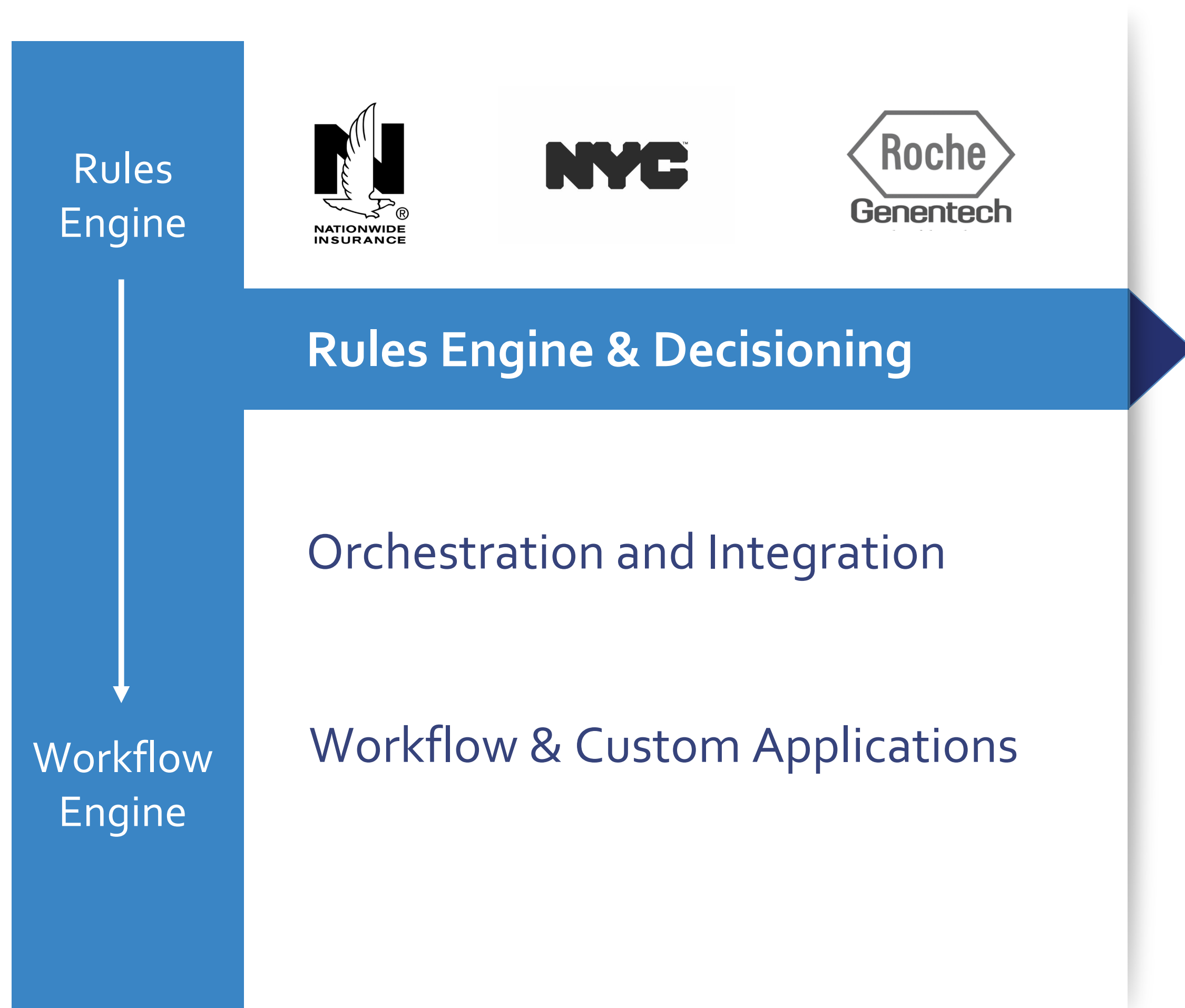


Automation & App Building

Build automated workflows and stand-alone applications with actionable dashboards.

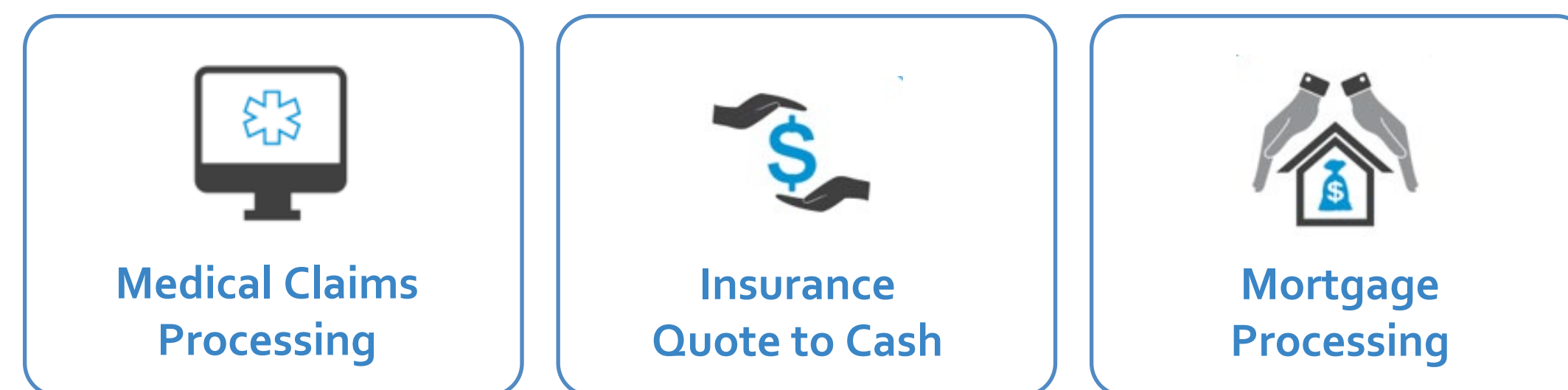


Automate with Decisions



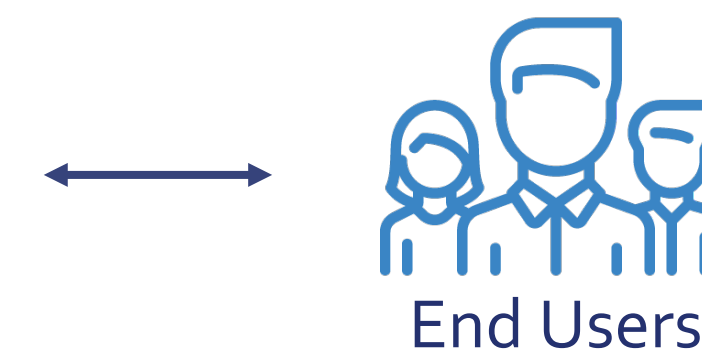
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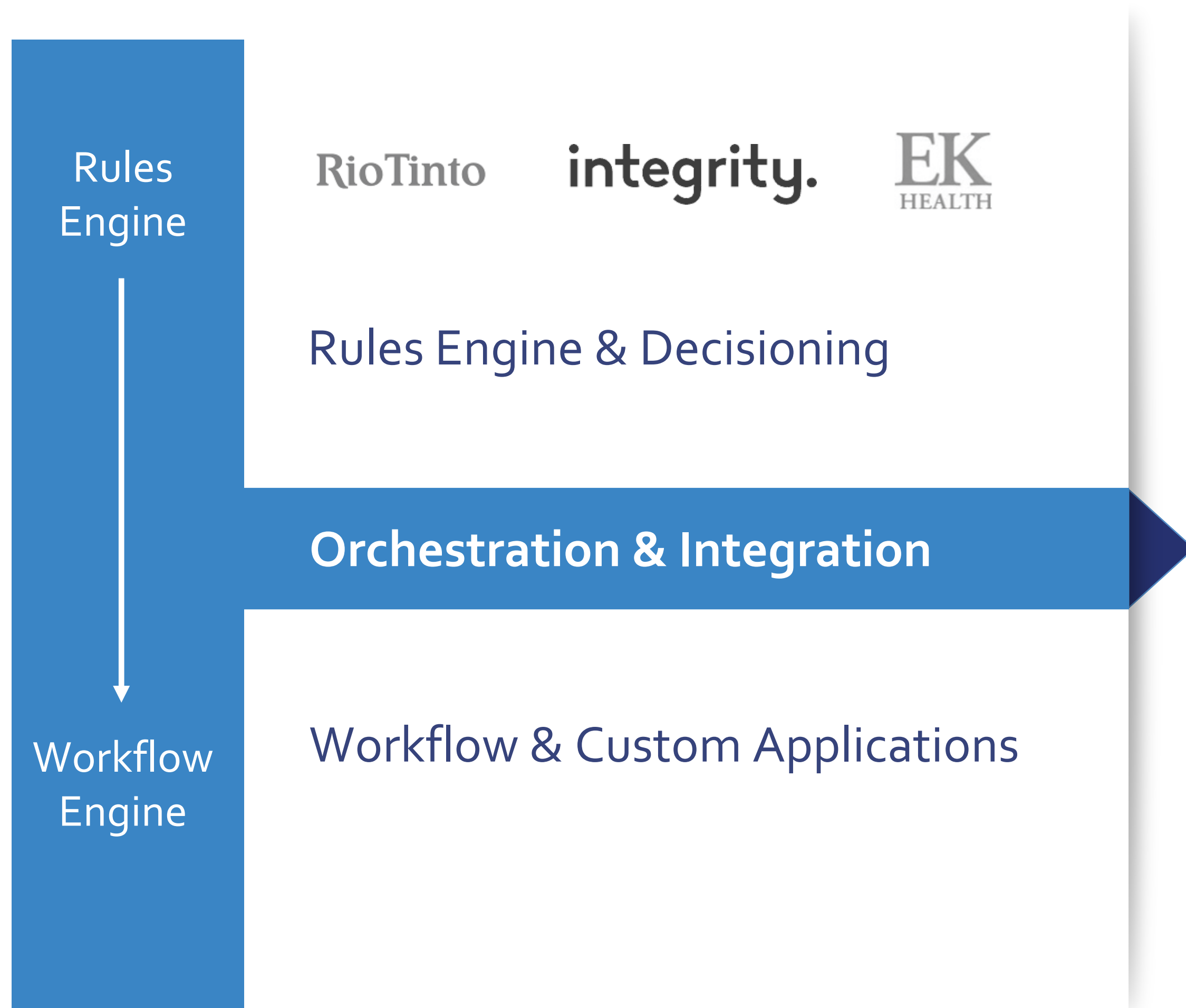
DECISIONS™

Policy Application.AddressState In List	NOT Policy Application.InstrumentType Contains	Histo
VA, FL, IL, PA, CA, NC, SC, DC	Guitar	-----
DE, AK, NE, TX, AL	Drums	-----
HI, AK	Other	5000
OH, TN, NY, GA	Piano	-----
GA, NC, CA	Violin	0 and
Click To Add Row		



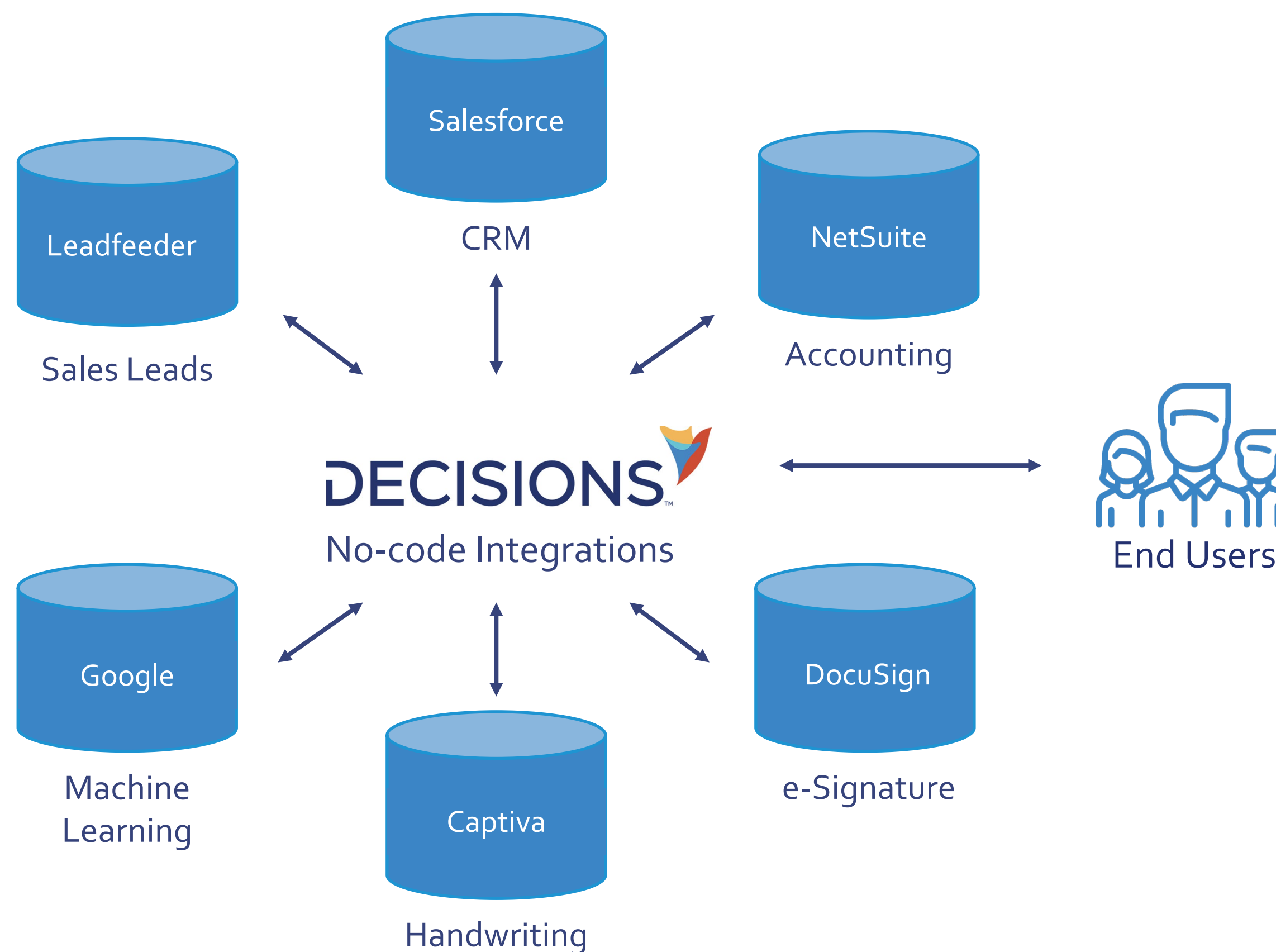
Graphical Rules Editors

Automate with Decisions

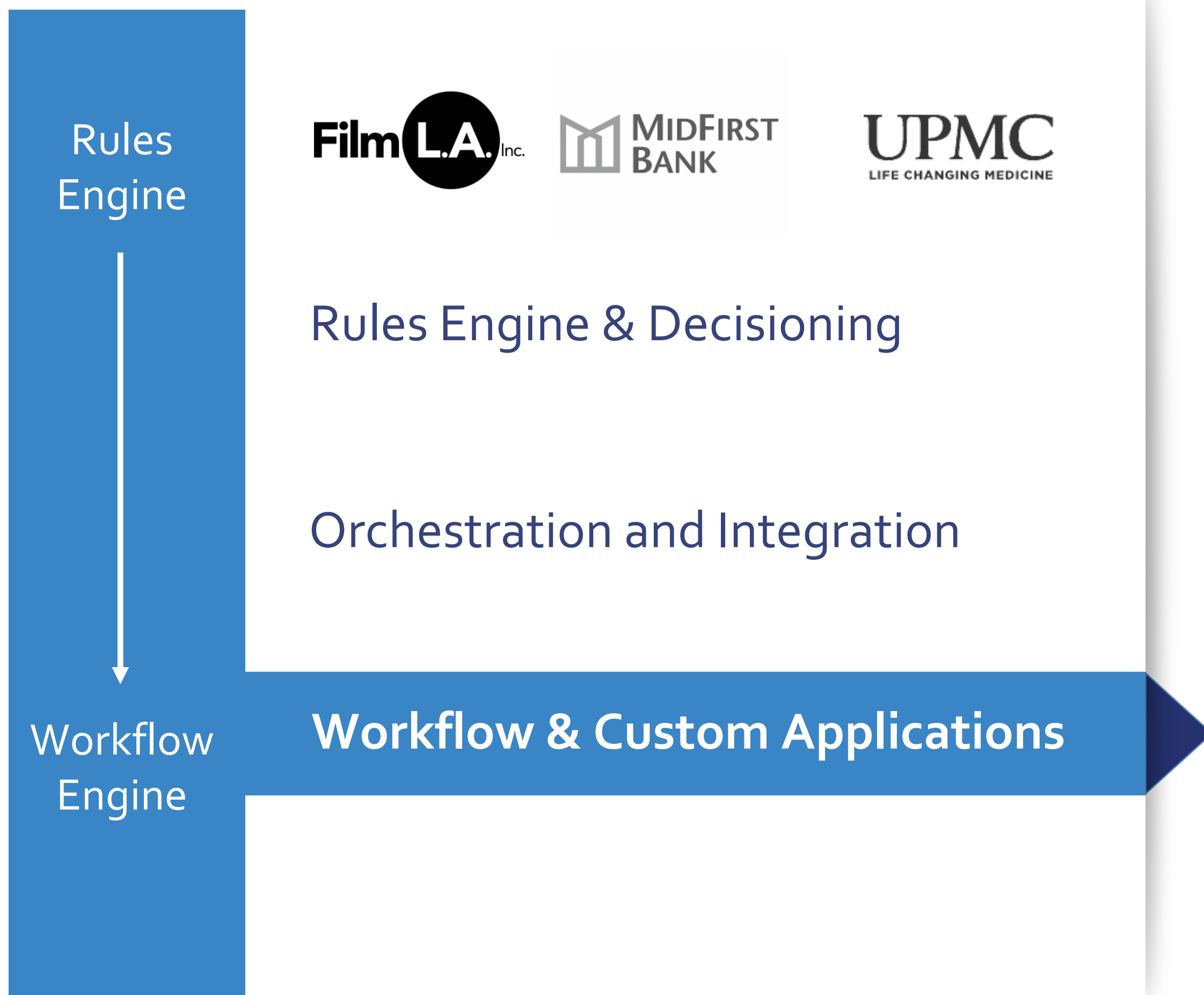


Orchestration

Translate between systems with the power of a rules engine.

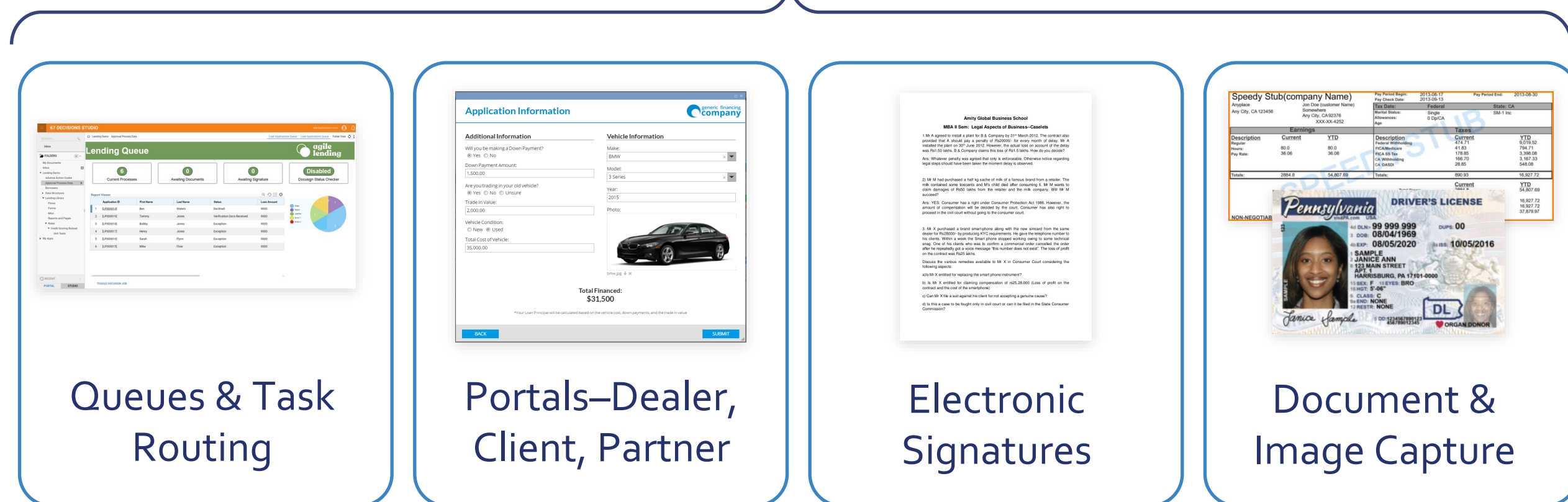
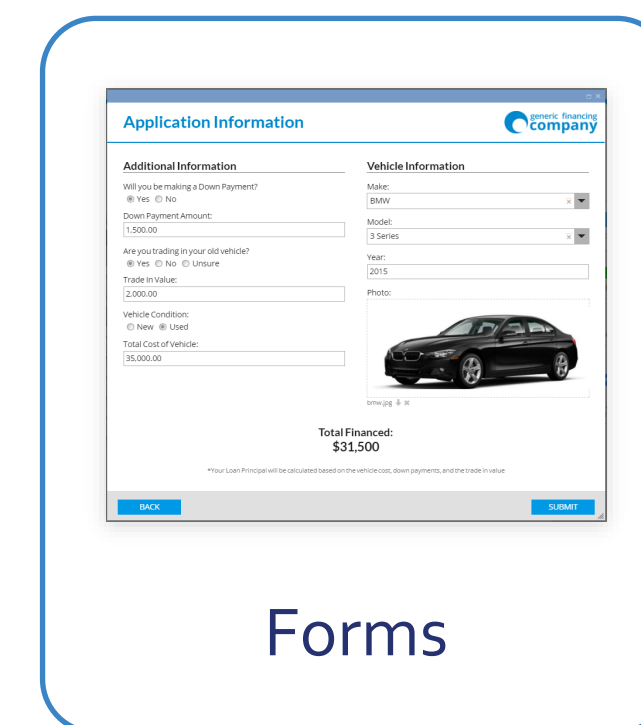


Automate with Decisions



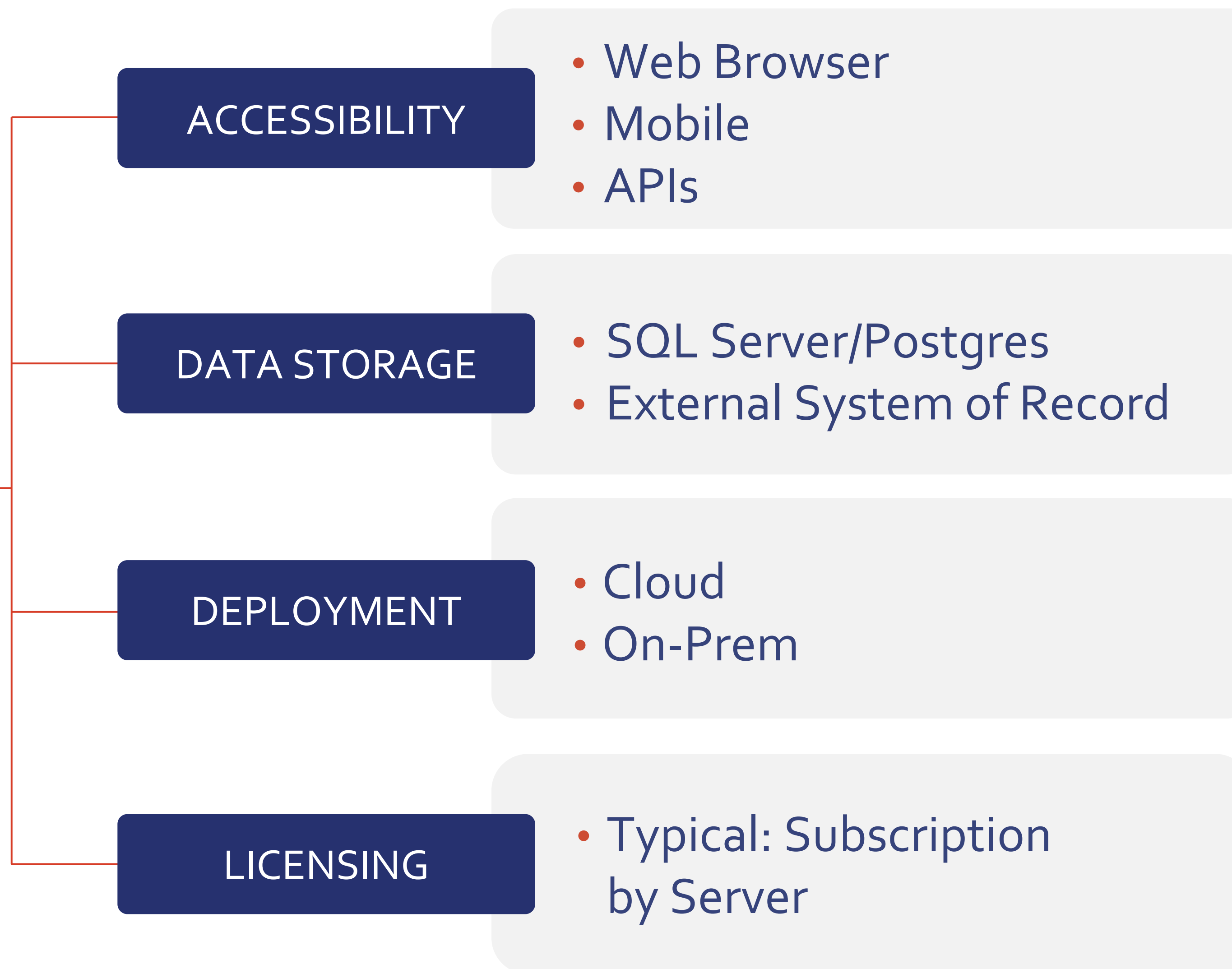
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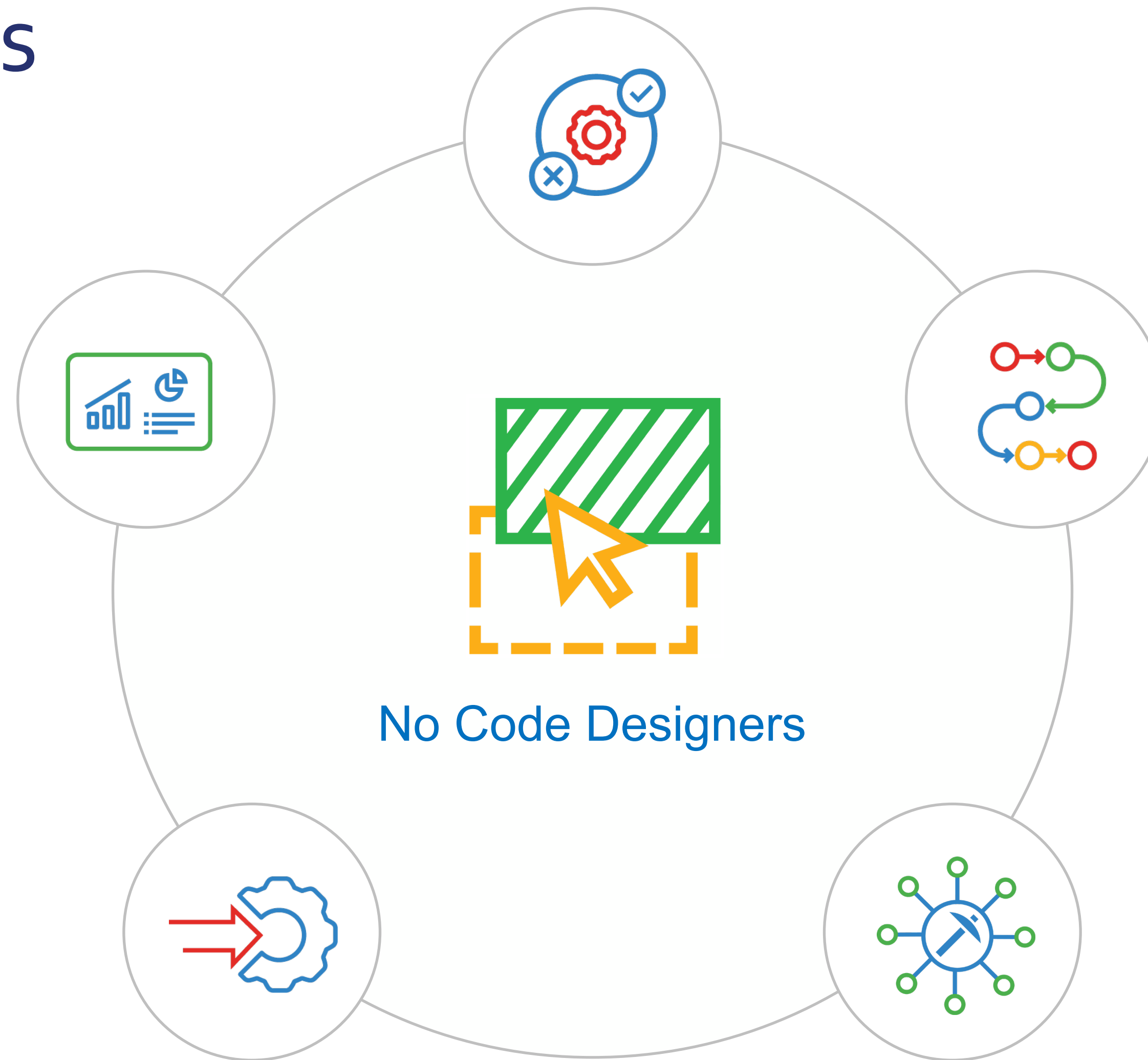
Flexible Architecture

Flexible





Visual Designers



Decisions Platform

DECISIONS PLATFORM

End User Portal

Lending Queue

17 Current Processes | 0 Awaiting Documents | 4 Awaiting Signature | Enabled Document Status Checker

Application ID	First Name	Last Name	Status	Loan Amount
1	Elise	Backpack	Verification Docs Received	5000
2	Elise	Jack	Verification Docs Received	6000
3	Paul	Smith	Contract Signed	6000
4	Ulysses	Frost	Declined	6000
5	Brook	Stone	Declined	5000
6	Greg	Jones	Declined	7000
7	Harry	Joseph	Declined	6000
8	Tom	Johnson	Contract Sent	7000
9	Frank	Oborny	Declined	7000
10	Jessica	Putter	Lead Rejected	8000

Dashboards

Application Information

Additional Information: Make, Model, Year, Vehicle Condition, Total Cost of Vehicle.

Vehicle Information: Make, Model, Year, Photos.

Total Financed: \$31,500

Forms

My Tasks

Entity Name	Date of Death	Claim Start D...	State	Funding Reques...
1 [claim 000024] Parr Funeral Home - Dick Harry	1/31/2019	2/6/2019	Funded / Ready For Submission	\$20,930.00
2 [claim 000023] Jones Funeral Home - Jenny Smith	1/23/2019	2/6/2019	Complete Claim Submitted / Awaiting Payout	\$234,234.00
3 [claim 000022] King Fisher Funeral Home - King Junior	1/18/2001	2/6/2019	In Process	\$87,990.00
4 [claim 000021] King Funeral Home - Lottie Davis	2/1/2019	2/6/2019	In Process	\$2,342.00
5 [claim 000020] Madison Easter Funeral Home - Jane Love	5/23/2000	2/6/2019	In Process	\$4,500.00
6 [claim 000019] Mather Funeral Home & Crematory - Jacob ...	1/22/2019	2/6/2019	In Process	\$234,234.00
7 [claim 000018] King's Funeral Service - Kathy Ulster	12/27/2018	2/6/2019	In Process	\$1,235,123.00
8 [claim 000017] Decisions Funeral Home - John Smithie	2/28/2019	2/6/2019	In Process	\$5,000.00
9 [claim 000016] Decisions Funeral Home - Joe Harris	2/16/2019	2/6/2019	In Process	\$50,000.00
10 [claim 000015] Alpha Funeral - Beta Gamma	2/6/2019	2/5/2019	In Process	\$30,000.00

Tasks

Report Viewer

Cloud Sta...	Cloud Stack Id	Cloud Stack Email	Account Owner	En...	Estim...	State
9 Decisio...	0016A00000B0K...	james@golath...	elise@decisions...	3/1/...	7/13/2...	Pending D...
10 Decisio...	0016A00000053E...	randy@pyrami...	elise@decisions...	3/14...	8/5/2018	Exception
11 Decisio...	0016A00000053E...	randy@pyrami...	elise@decisions...	3/14...	8/5/2018	Pending D...
12 Decisio...	0016A00000053E...	corey@grandho...	elise+1@decisio...	3/15...	8/5/2018	Exception
13 Decisio...	0016A00000053E...	corey@grandho...	elise+1@decisio...	3/15...	8/5/2018	Pending D...
14 Decisio...	0016A00000053E...	mike@ua.edu	elise+1@decisio...	4/25...	7/13/2...	Exception
15 Decisio...	0016A00000053E...	mike@ua.edu	elise+1@decisio...	4/25...	7/13/2...	Pending D...
16 Decisio...	0016A00000053E...	mike@decisions...	elise@decisions...	5/8/...	7/13/2...	Exception
17 Decisio...	0016A00000053E...	mike@decisions...	elise@decisions...	5/8/...	7/13/2...	Pending Ap...
18 Decisio...	0016A00000053E...	corey@grandho...	elise+1@decisio...	7/15...	8/5/2018	Pending D...
19 Decisio...	0016A00000053E...	corey@grandho...	elise+1@decisio...	7/15...	8/5/2018	Pending D...

Reports

Designer Studio

Rules Engine

Rules Engine

Workflow Manager

Workflow Manager

Mining Agents

Mining Agents

Integrations

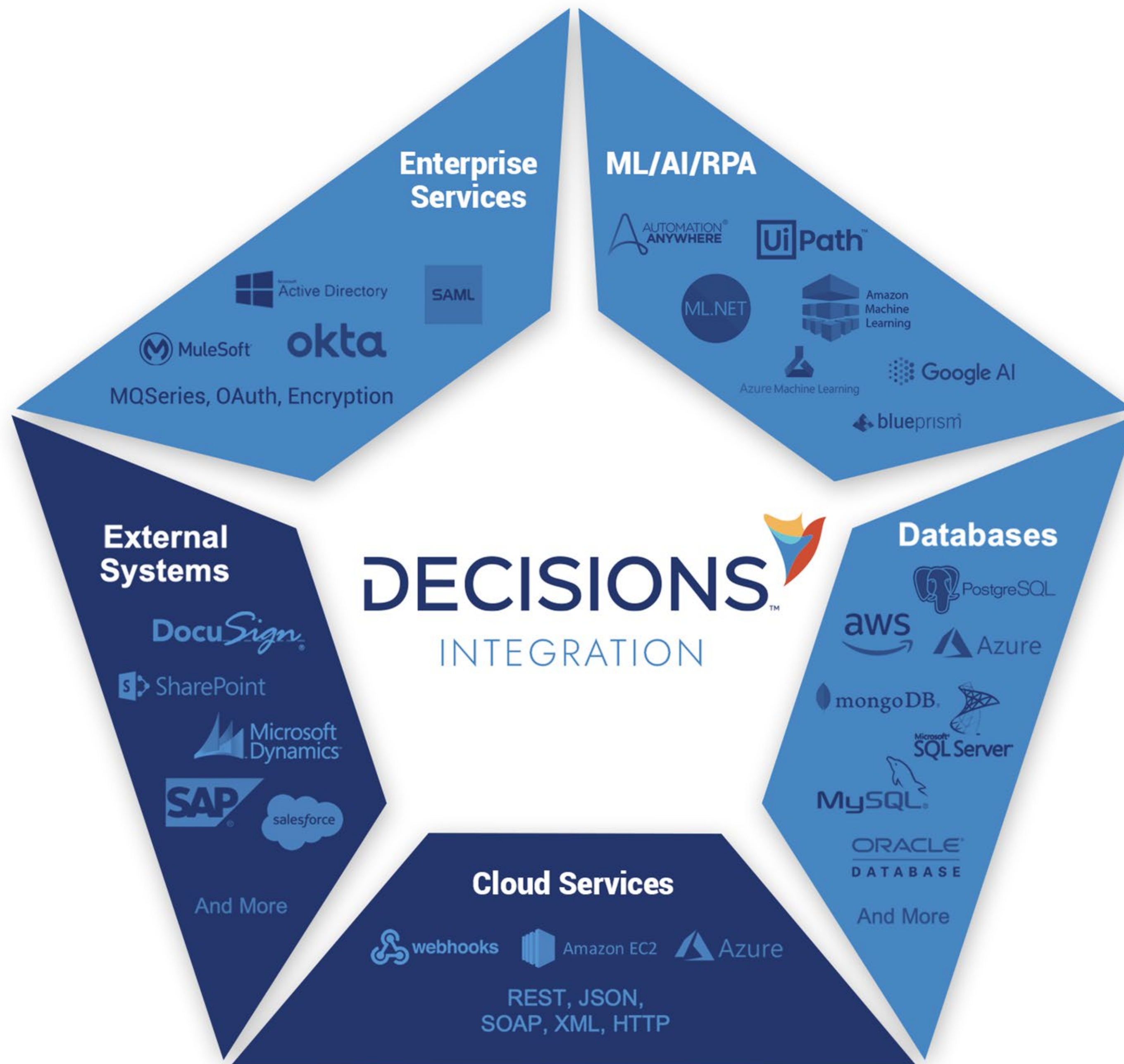
Integrations

Interface Designer

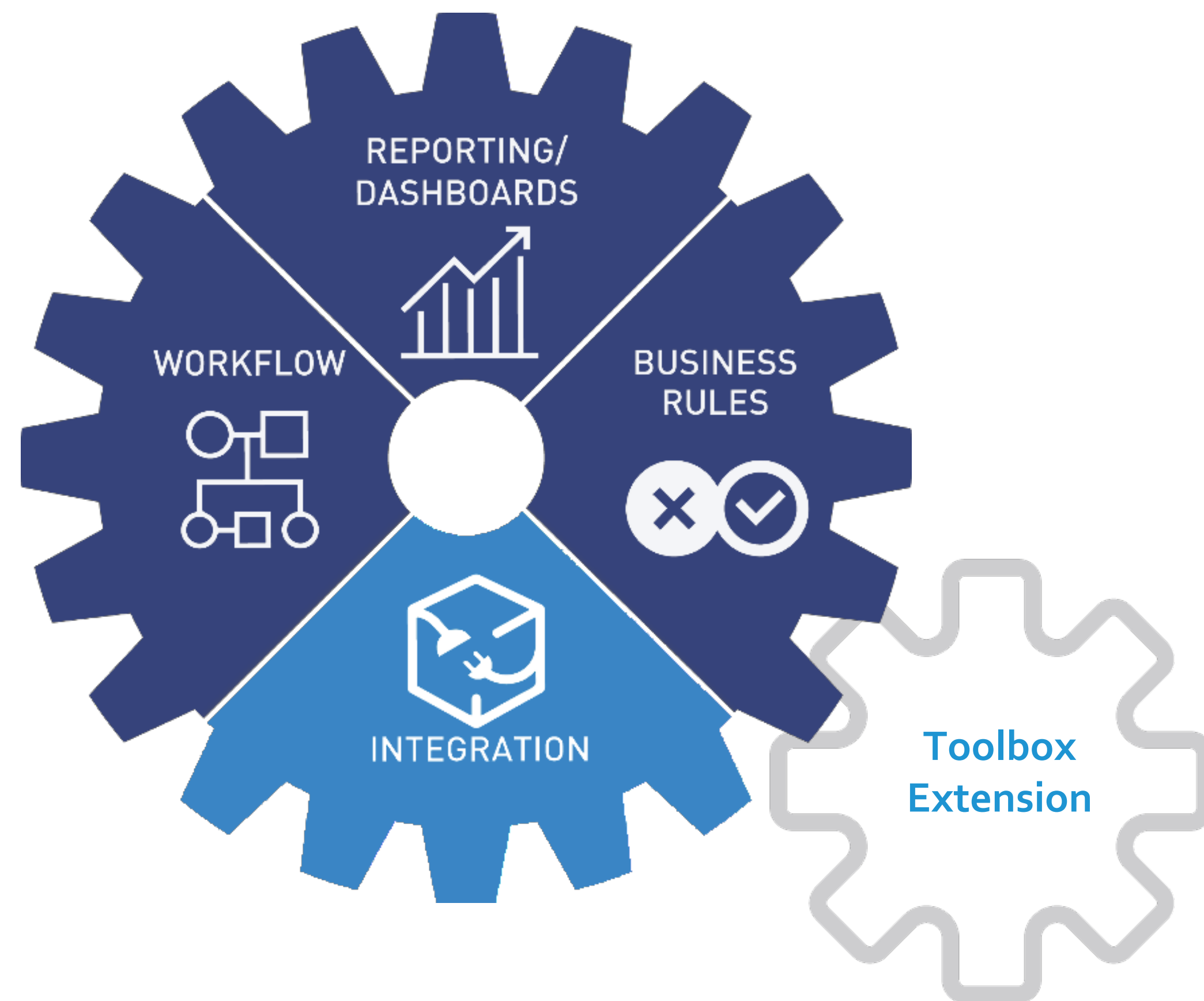
Interface Designer

CUSTOM / API / SDK / MICROSERVICES

Integration



Integration: Software Development Kit



Easy to Use .NET-Based SDK

Create customized:

- Flow Steps
- Data Structures
- Custom Integrations
- Rule Steps
- UI Elements
- Data Sources

Architecture



Authentication & Authorization

SAML

okta



Microsoft **Active Directory**



AND MORE...

Presentation Layer

DECISIONS STUDIO

- Flow Designer
- Rule Designer
- Form Builder
- Report Designer
- Admin Tools

DECISIONS PORTAL

- Forms
- Dashboards
- Tasks
- Notifications
- Reports

NATIVE MOBILE

Application Layer

DECISIONS PLATFORM

- ORM
- Security
- Monitoring
- Reporting Engine
- SDK
- Batch Processing
- Rule Engine
- Workflow Engine
- Process Mining
- Caching
- Shared
- Services

Data Layer



Service Layer

API Management

Database Connectors

REST/SOAP

XML/JSON

External Systems



FTP
IMAP/POP/SMTP
HTTP
HL7
MANY MORE...

External Databases



AND MORE...

Other External Interfaces

Decisions Platform

End User Portal

Dashboards

Forms

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14	Decisions-30	0016A00000053E...	mike@ua.edu	elise+1@decisio...	4/25...	7/13/2...	Exception
15	Decisio...	0016A00000053E...	mike@ua.edu	elise+1@decisio...	4/25...	7/13/2...	Pending D...
16	Decisions-31	0016A00000053E...	mike@decisions...	elise@decisions...	5/8/...	7/13/2...	Exception
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Reports



End Users



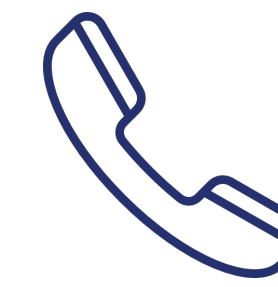
Company Portal
Website Sharepoint



Email



Mobile SMS

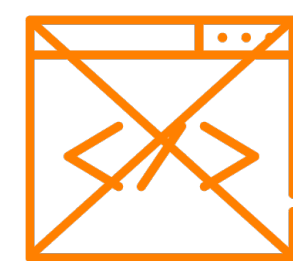


Telephone

Decisions Platform



Business Analysts



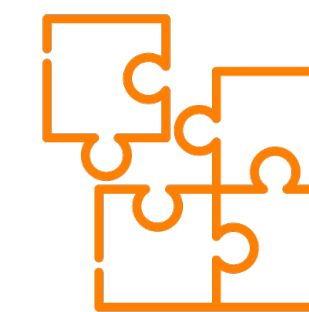
Codeless Creation



Robust Applications
with testing, monitoring

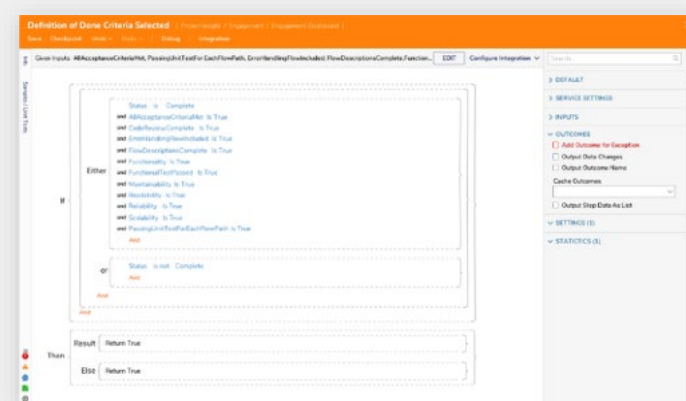


Audit Trail

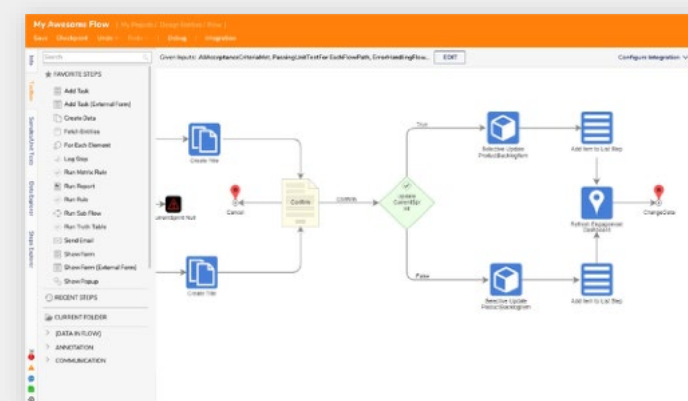


Integrations

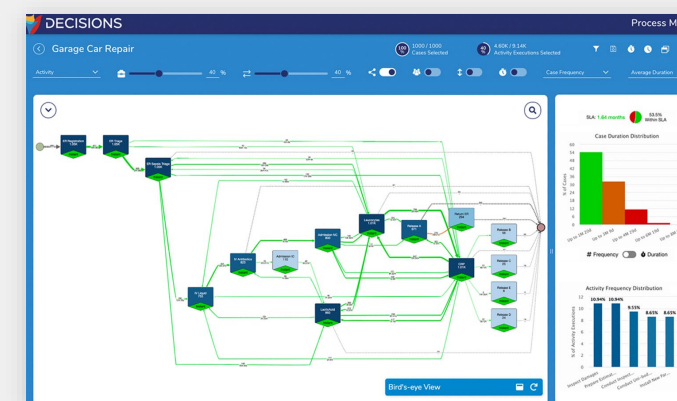
Designer Studio



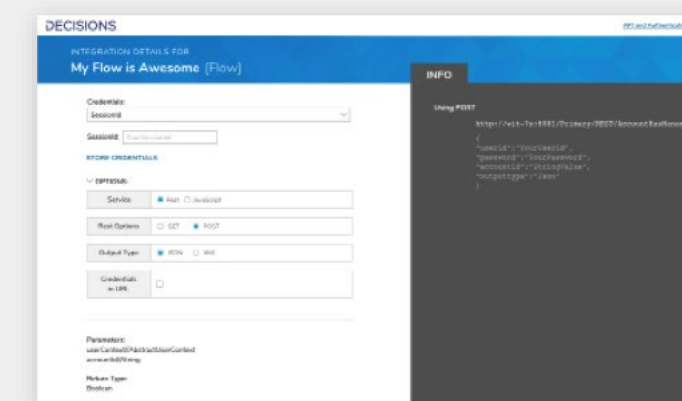
Rules Engine



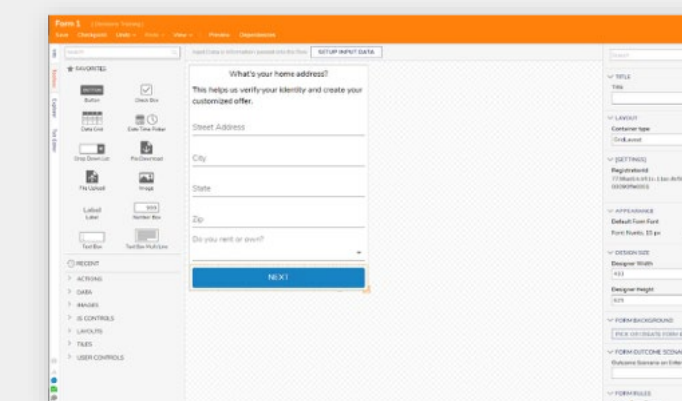
Workflow Manager



Mining Agents



Integrations

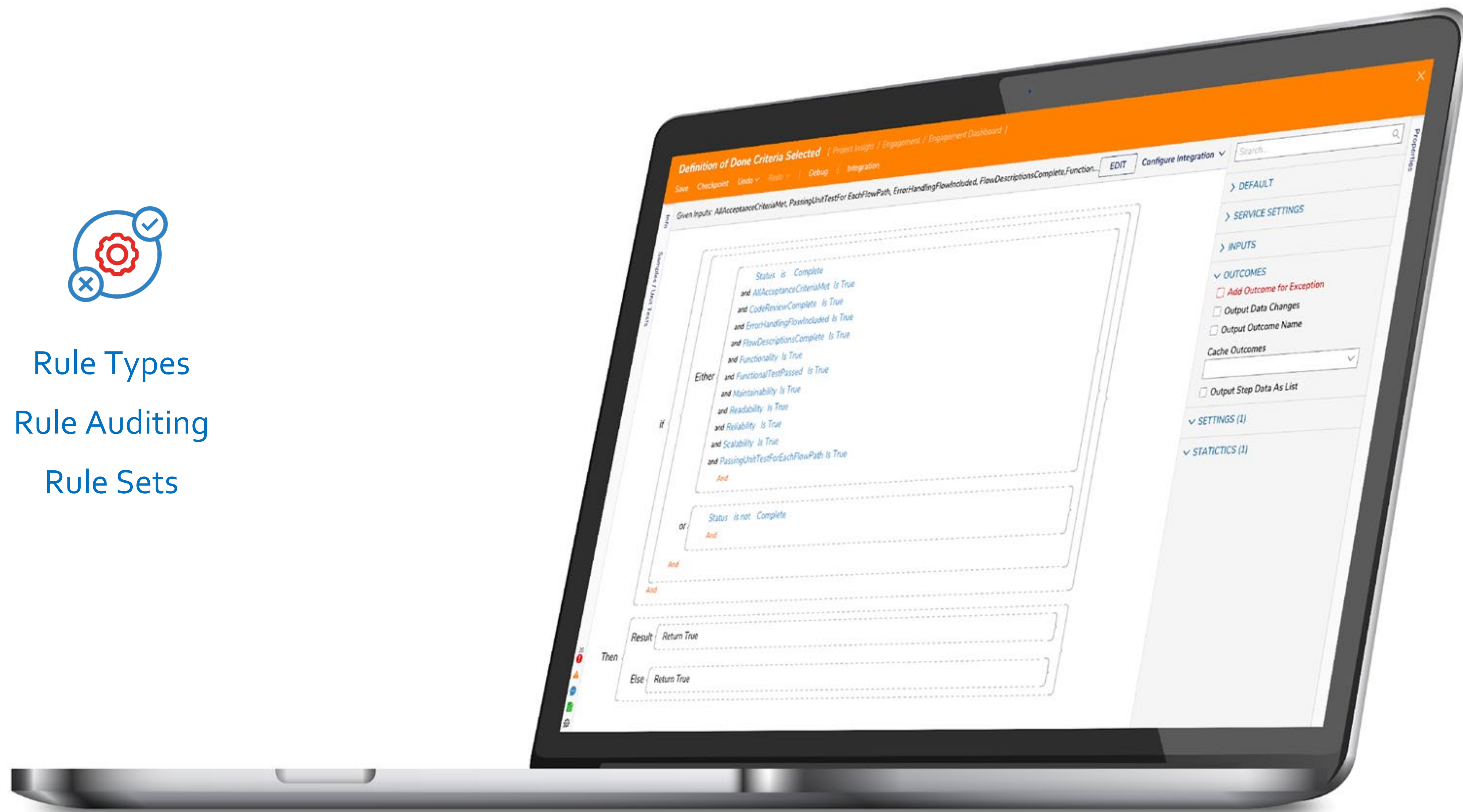


Interface Designer

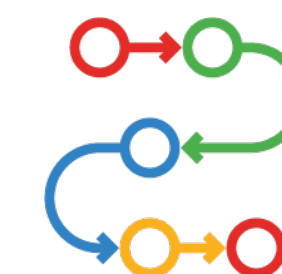
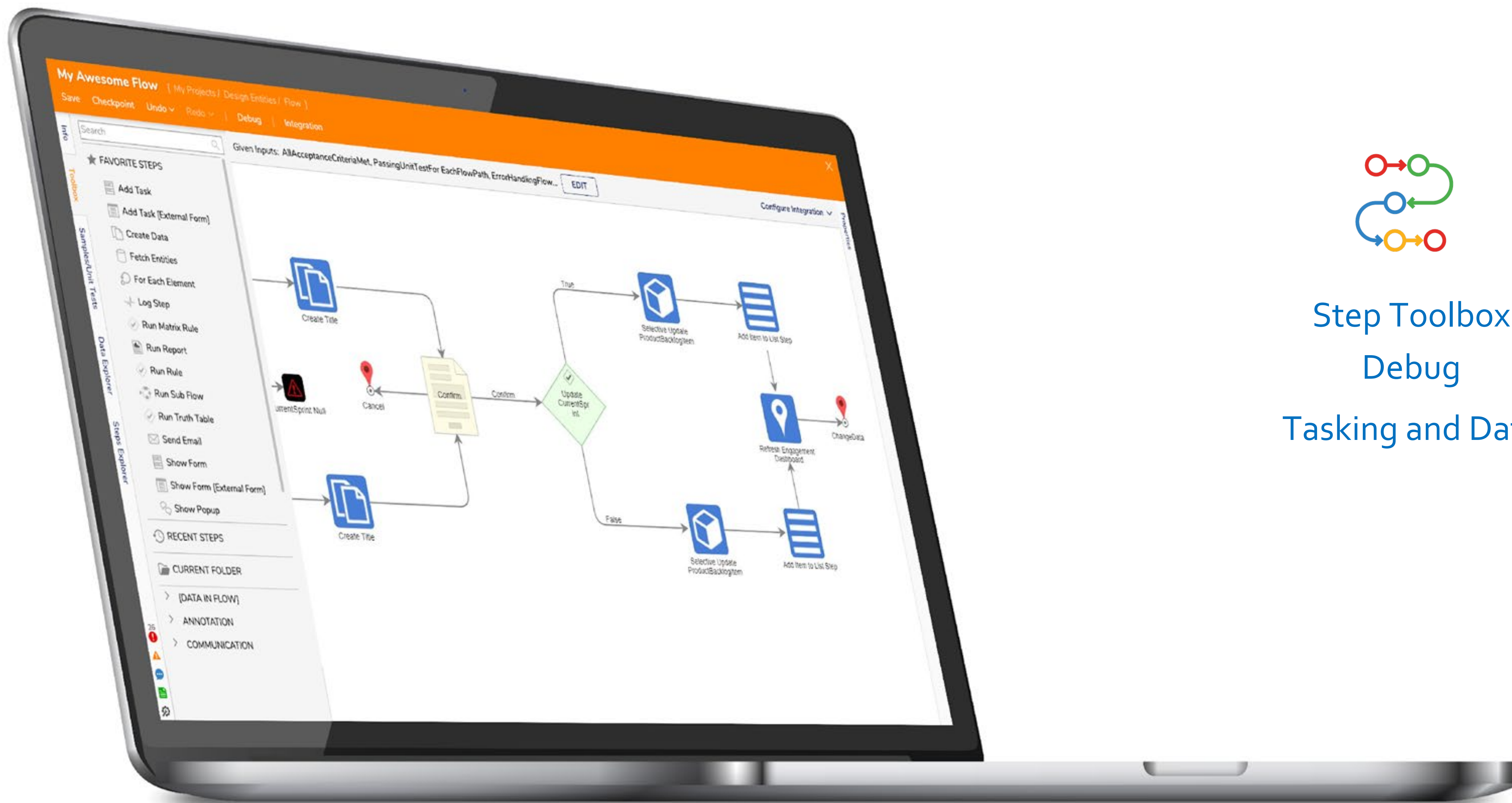
Rules Engine



Rule Types
Rule Auditing
Rule Sets



Workflow Manager

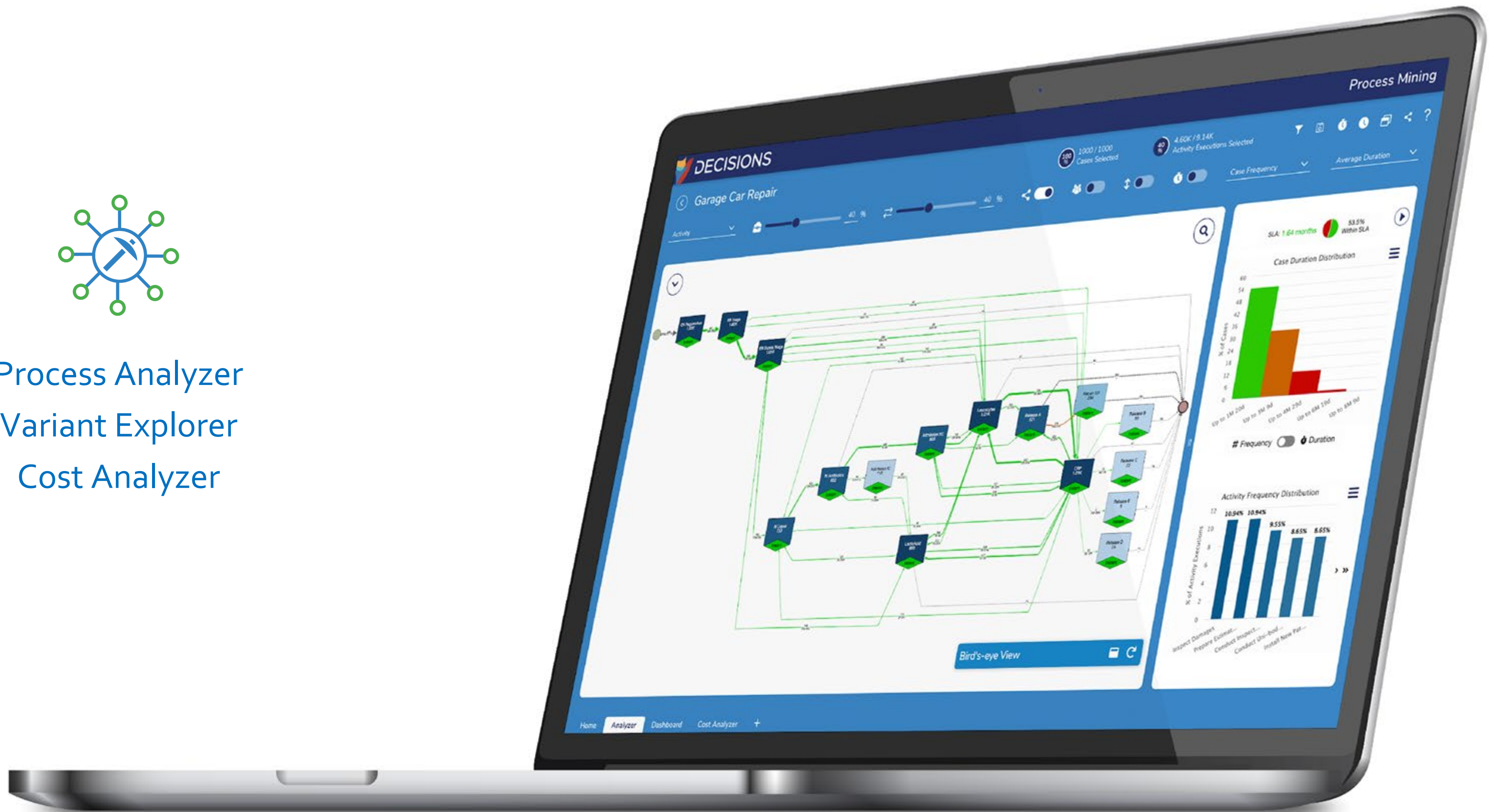


Step Toolbox
 Debug
 Tasking and Data

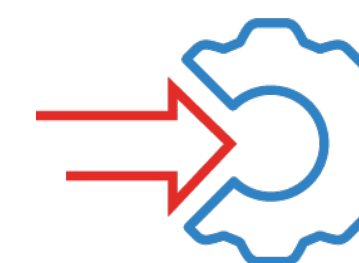
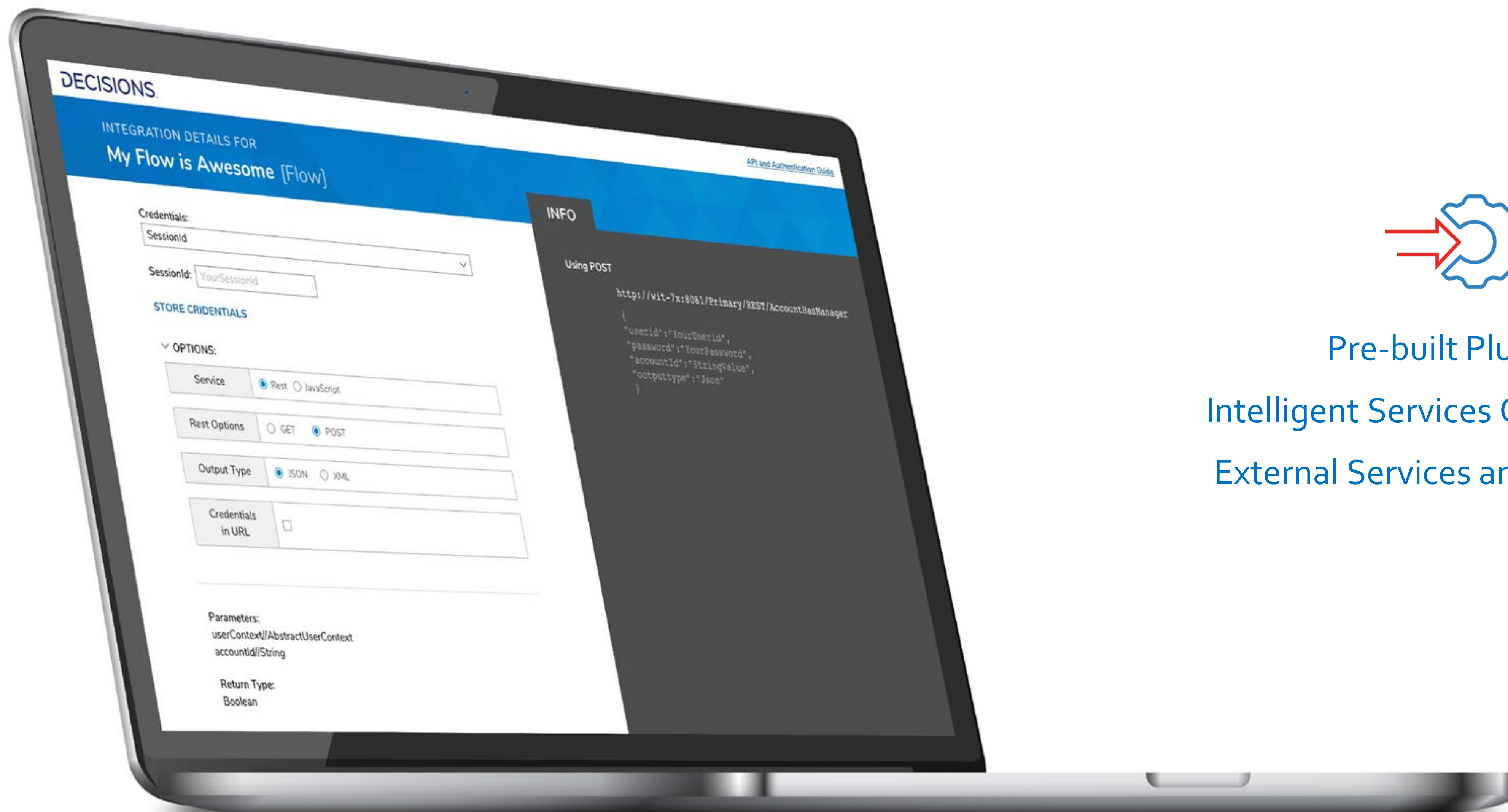
Mining Agents



Process Analyzer
 Variant Explorer
 Cost Analyzer



Integrations



Pre-built Plug-ins

Intelligent Services Orchestration

External Services and Databases

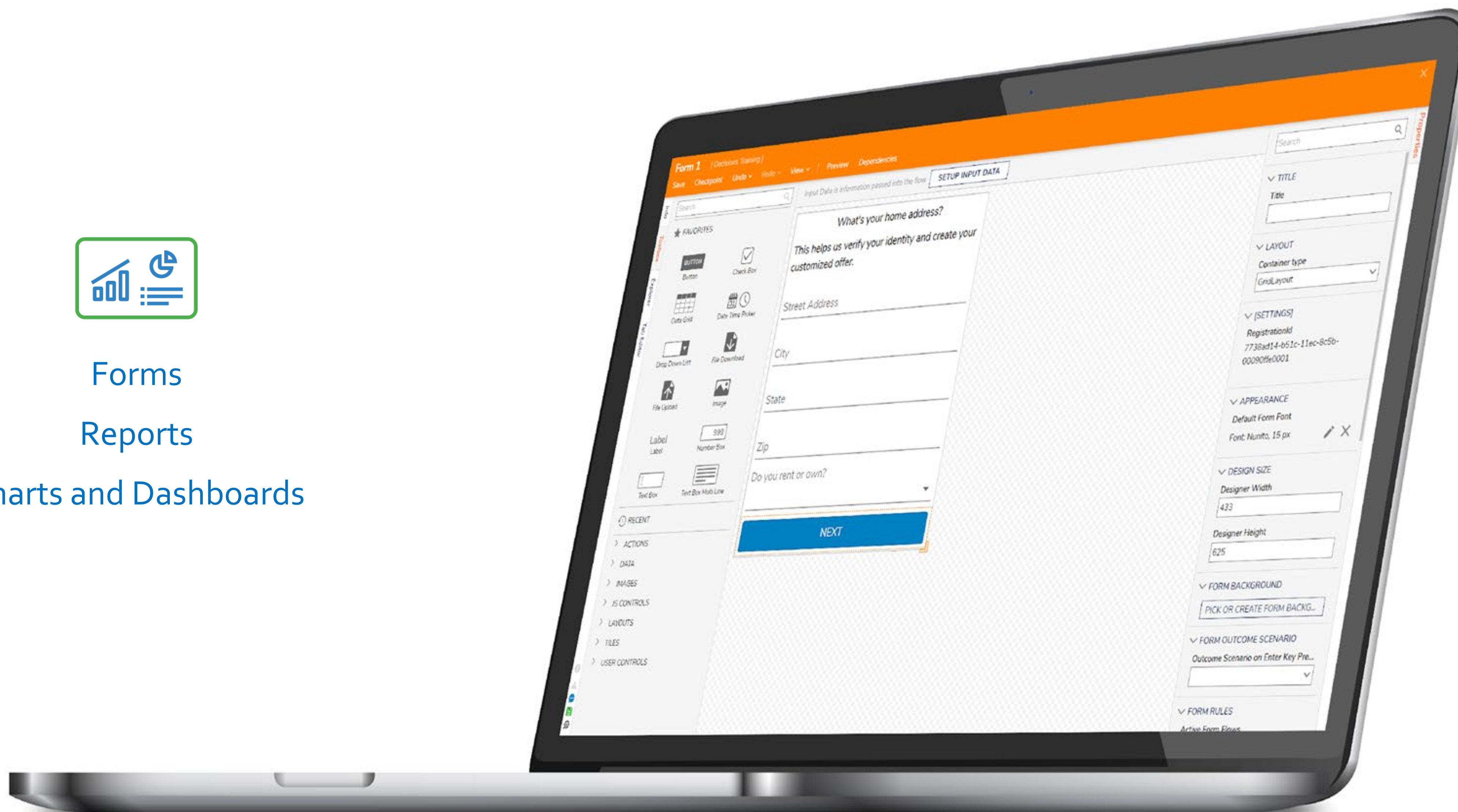
Interface Designer



Forms

Reports

Charts and Dashboards



Form Designer

The screenshot displays the Form Designer application interface. The main workspace shows a form titled "Musical Instrument Insurance" with the Agile Company logo. The form is divided into two sections: "Applicant Contact Details" and "Mailing Address".

Applicant Contact Details:

- First Name:
- Last Name:
- Email:

Mailing Address:

- Street:
- City: USPS Validated
- State: Zip Code:
- Use USPS Validated Address? Yes No

At the bottom of the form are "Back" and "CONTINUE" buttons.

Right-hand Sidebar:

- Form Controls:** A list of components including Button, Check Box, Data Grid, Date Time Picker, Drop Down List, File Download, File Upload, Image, Label, Text Box, and Text Box Multi Line. Each item has a star icon for favoriting.
- Recent Components:** A section for recently used components.
- Actions:** A section for available actions.
- Properties Panel:**
 - Title:** A text input field.
 - Layout:** A dropdown menu set to "Grid".
 - [Settings]:**
 - RegistrationId:** 43ebb243-2b94-4fa6-84d5-d07dd10c64e7
 - Appearance:**
 - Default Form Font:** Font: Arial, 16 px
 - Design Size:** A section for design size settings.

Report Designer

Save Close Checkpoint Run Report Integration History Dependencies [Report] All Instrument Applications Report

Data Sources	Filters	Data Fields	Views
Instrument Policy Add	Add	Policy App State Replacement Cost Instrument Type Folder Id Add	Data Matrix Add

Data **Matrix** Auto Preview 50 Limit Rows in Preview [VIEW SQL](#) [REFRESH PREVIEW](#)

Policy App	State	Replacement Cost	Instrument Type	
Denied Total Exposure: \$134,558.00				
1 [IPQ-029332] Kinley Díaz, Alyssa	Denied	\$134,058.00	Brass	
2 [IPQ-029348] Morris, Natalia	Denied	\$500.00	Other	
Exception Total Exposure: \$4,823.00				
3 [IPQ-029330] Angelina Hall, Skylar	Exception	\$4,823.00	Strings	
Payment Total Exposure: \$229,622.00				
4 [IPQ-029338] Alexa Gray, Lila	Payment	\$163,655.00	Brass	
5 [IPQ-029347] Lee, Grace	Payment	\$30,000.00	Guitar	
6 [IPQ-029344] Kelly, Nolan	Payment	\$15,000.00	Guitar	
7 [IPQ-029345] Bell, Edward	Payment	\$15,000.00	Guitar	
8 [IPQ-029349] James, Hadley	Payment	\$1,423.00	Guitar	
9 [IPQ-029350] Butler, Parker	Payment	\$4,544.00	Piano	
Review Total Exposure: \$828,935.00				
Total Exposure: \$1,197,938.00				

Properties

- Settings (10)
- Actions (2)
- Calendar View (2)
- Colors and Icon (1)
- Grid View (3)
- Group Options (3)
- Matrix View (4)
- Report Access (9)
- Required Fields (1)
- Results (5)

Dashboard Designer

DECISIONS STUDIO
bracey@decisions.com

SEARCH...
/ Demos / Lending Demo / Approval Process Data

Lending Queue
agile lending

17
 Current Processes

0
 Awaiting Documents

4
 Awaiting Signature

Disabled
 Docusign Status Checker

Loan Applications
🔍 ↻ 📄 ⚙️

Application ID	First Name	Last Name	Status	Loan Amount
1 [LP000018]	Elise	Backpack	Verification Docs Received	5000
2 [LP000017]	Elise	Jack	Verification Docs Received	5000
3 [LP000015]	Paul	Smith	Contract Signed	6000
4 [LP000016]	Ulysses	Frant	Declined	6000
5 [LP000014]	Brook	Stone	Declined	5000
6 [LP000013]	Greg	Jones	Declined	7000
7 [LP000012]	Harry	Joseph	Declined	6000
8 [LP000011]	Tom	Johnson	Contract Sent	7000
9 [LP000010]	Frank	Oborny	Declined	7000
10 [LP000009]	Jessica	Potter	Lead Rejected	8000

By State

- > Started (0) 1/23/2019 1:59 PM
- > Started (0) 1/23/2019 1:59 PM
- > Awaiting Verification Docs (0) 1/23/2019 2:00 PM
- ▼ Verification Docs Received 1/23/2019 2:01 PM
- 📄 CheckStub
SYS > 1/23/2019 2:01 PM [DOWNLOAD](#) [UPDATE](#) [All >](#)
- 📄 CreditReport.pdf
SYS > 1/23/2019 2:01 PM [DOWNLOAD](#) [UPDATE](#) [All >](#)
- 💬 100% Complete
SYS > 1/23/2019 2:01 PM [All >](#)
- > Contract Sent (0) 1/23/2019 2:01 PM
- > Contract Signed (1) CURRENT 1/23/2019 2:02 PM

Add Comment

PORTAL
STUDIO
TOGGLE DOCUSIGN JOB
CHECK FOR SIGNATURES

Actionable Dashboard

Home / Demos / Lending Demo / Approval Process Data Loan Applications Queue | Folder View

Lending Queue

17
Current Processes

0
Awaiting Documents

4
Awaiting Signature

Enabled

Docusign Status Checker

Loan Applications 🔍 ↻ 📄 ⚙️

Appli	First Name	Last Name	Status	Loan Amount
1 [LPC	lise	Backpack	Verification Docs Received	5000
2 [LP0	lise	Jack	Verification Docs Received	5000
3 [LP000015]	Paul	Smith	Contract Signed	6000
4 [LP000016]	Ulysses	Frant	Declined	6000
5 [LP000014]	Brook	Stone	Declined	5000
6 [LP000013]	Greg	Jones	Declined	7000
7 [LP000012]	Harry	Joseph	Declined	6000
8 [LP000011]	Tom	Johnson	Contract Sent	7000
9 [LP000010]	Frank	Oborny	Declined	7000
10 [LP000009]	Jessica	Potter	Lead Rejected	8000

By State | 🔍 > 📄 ⋮

- > Started (0) 1/23/2019 2:07 PM
- > Started (0) 1/23/2019 2:07 PM
- > Awaiting Verification Docs (0) 1/23/2019 2:07 PM
- > Verification Docs Received CURRENT 1/23/2019 2:07 PM

CheckStub
SYS > 1/23/2019 2:07 PM DOWNLOAD | UPDATE | All >

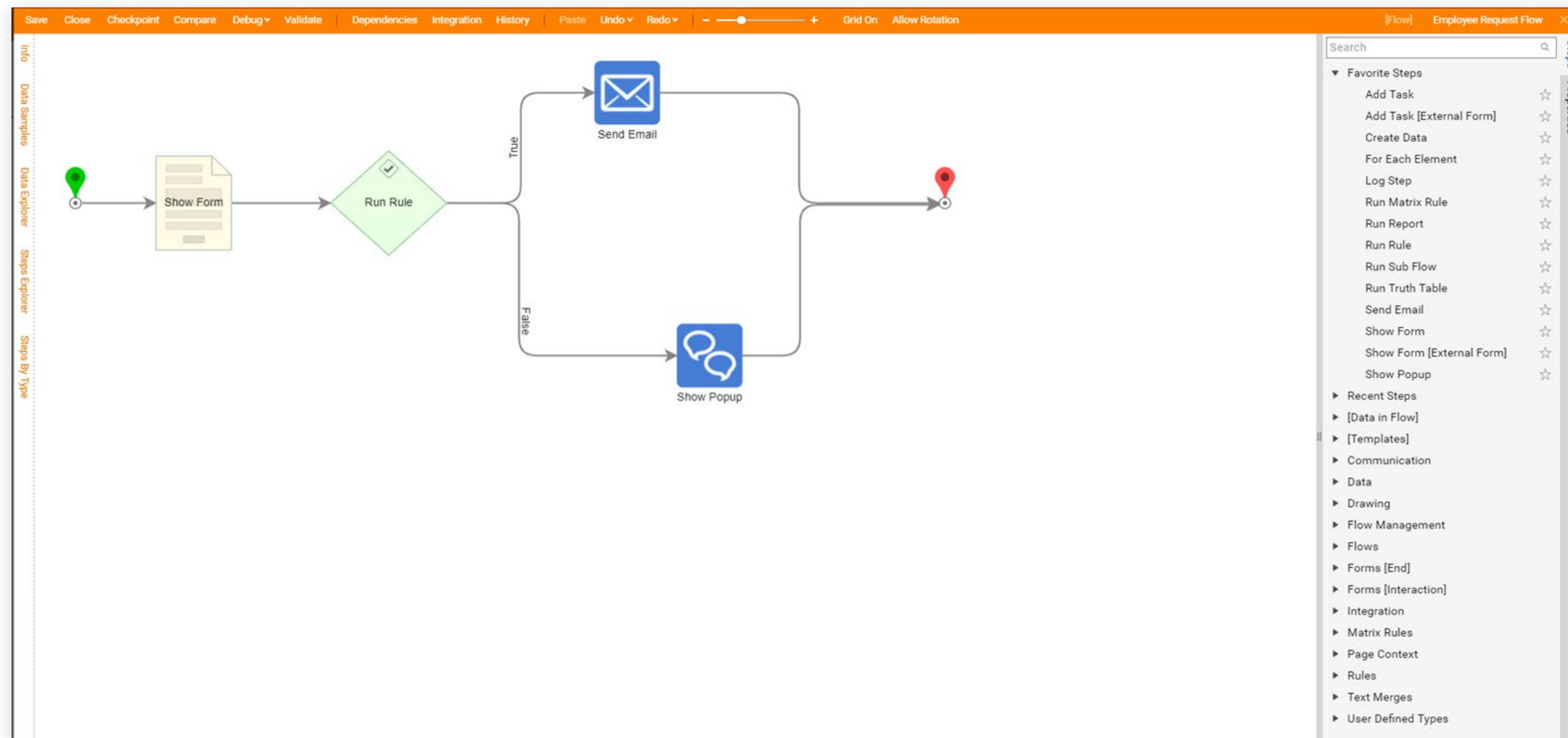
CreditReport.pdf
SYS > 1/23/2019 2:07 PM DOWNLOAD | UPDATE | All >

100% Complete
SYS > 1/23/2019 2:07 PM All >

Process Manually Ended by SYSTEM on 1/23/2019 2:07:25 PM
ADM > 1/23/2019 2:07 PM All >

Add Comment

Workflow Designer



Sequence of Steps

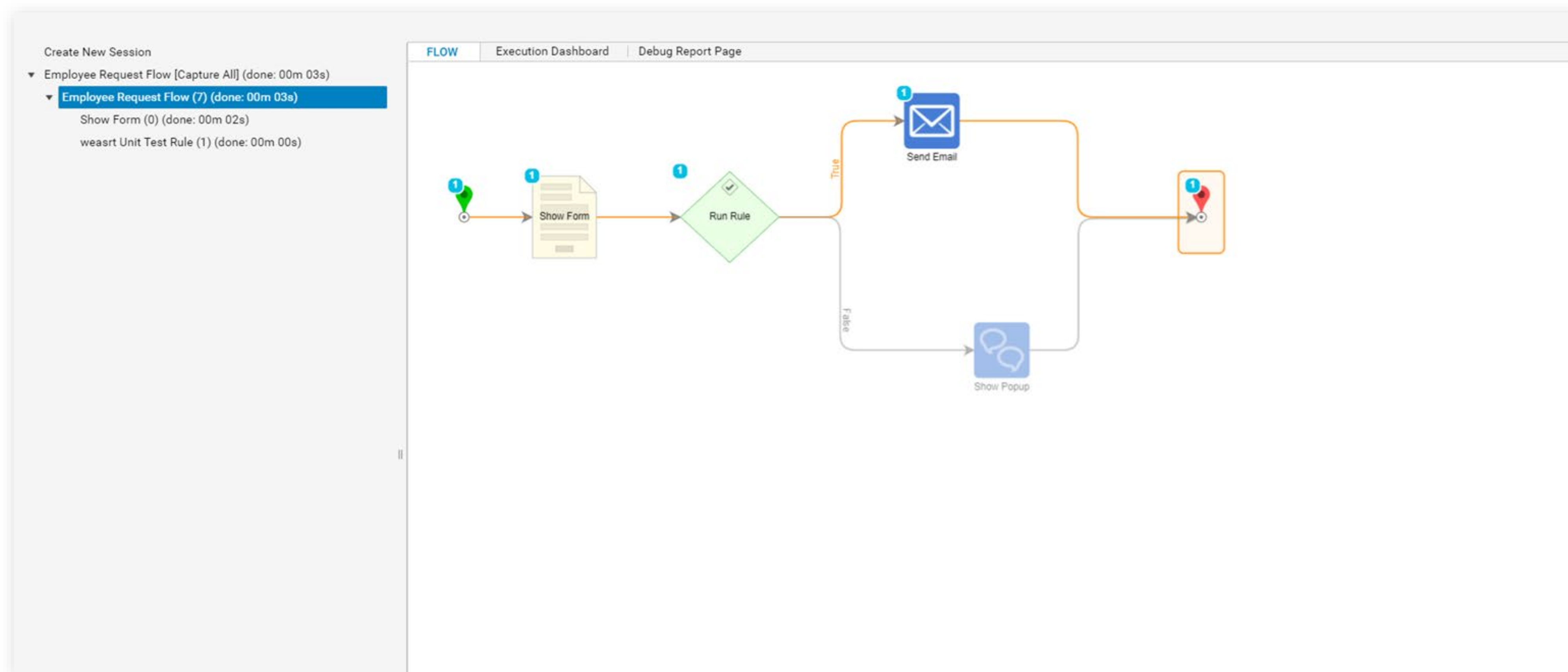
Steps Take Action

- Show form
- Get Data DB
- Send email
- Calculate > 3,000 steps

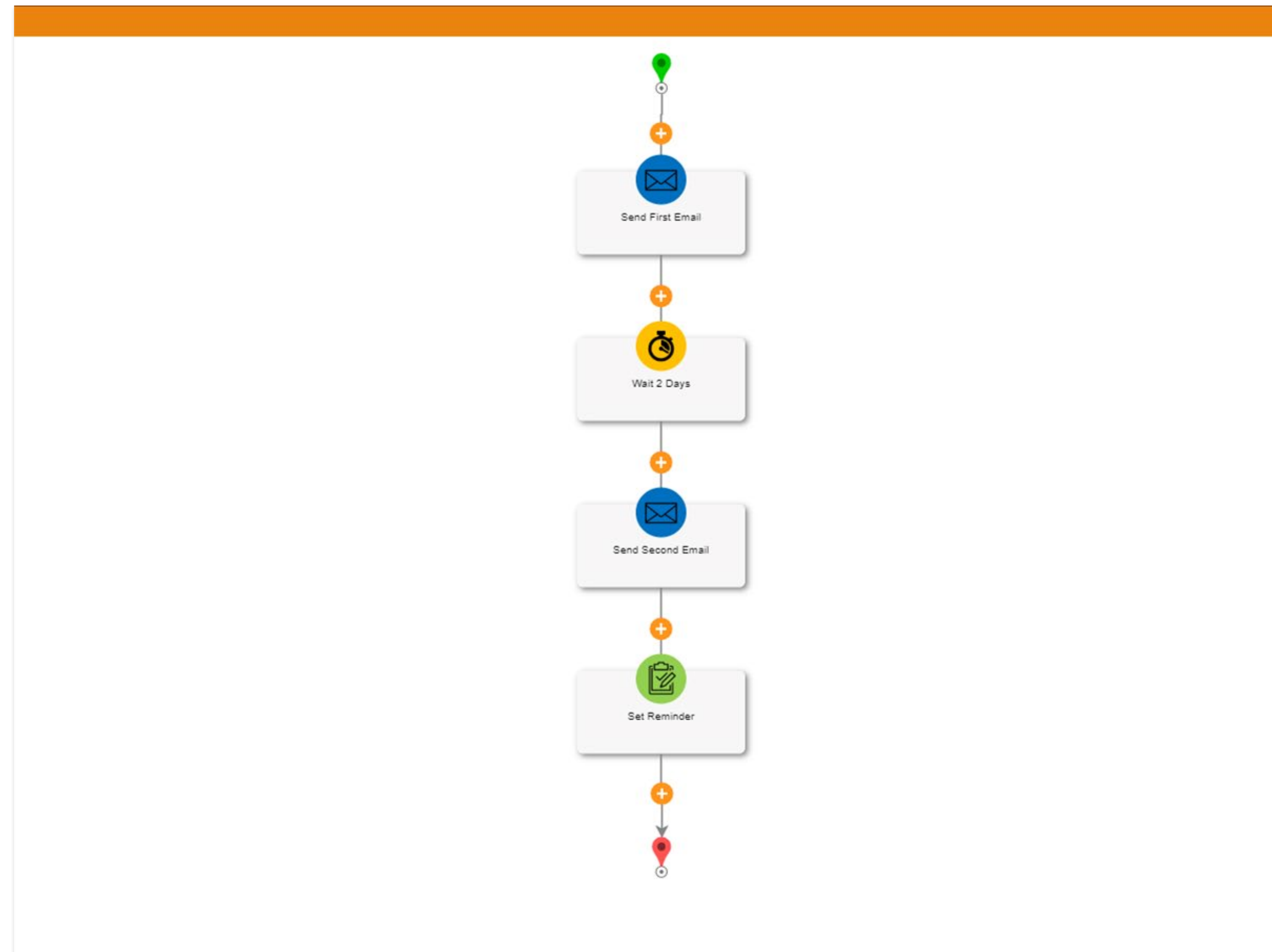
Actions Are Tracked

- SLAs
- Deadlines
- Reports

Workflow Debugger




Workflow Simple Flows












Case Management


DECISIONS STUDIO

SEARCH... 

Home / My Apps / CaseDemo / HRViolation Configuration

1	2	3	4
Started	Interview	Compile Data	
<i>Add State</i>	<i>Add State</i>	<i>Add State</i>	
Actions	Actions	Actions	Actions
 Close As Junk	 Schedule	 Change State	 C
 Add Legal	 Change State	 Add Document	
 Change State	<i>Add Action</i>	 Translate	
<i>Add Action</i>		<i>Add Action</i>	

Left Sidebar:

- SEARCH...
- Inbox
- FOLDERS 
 - My Documents
 - Inbox
 - My Apps
 - CaseDemo
 - HRViolation Configuration
 - CaseFlows
 - Cases
 - System
 - Task Queues

Business Rules: Statement

The screenshot displays the DECISIONS Business Rules editor interface. At the top, a menu bar includes options like Save, Close, Checkpoint, Debug, Dependencies, Integration, History, Undo, and Redo. The main workspace is titled 'Given Inputs [Applicant Age, Cosigner Age]' with an 'EDIT INPUT DATA' button. The rule statement is structured as follows:

```

If {
  Applicant Age Greater Than Or Equal To 18
  and Cosigner Age Greater Than Or Equal To 21
}
Then {
  Result {
    Return True
  }
  Else {
    Return False
  }
}
    
```

On the right side, the 'Properties' panel is visible, showing configuration options for the rule:

- Default**
 - Name:** Loan Applicant Age Rule
 - Behavior Type:** Default Rule Behavior
- Output**
 - Allow Actions
 - Show Else Result
 - Show Missing Result
- Settings (6)**
- Statistics (1)**
- Default Inputs (1)**
- UnitTests (1)**

Business Rules: Behavior Types

Save Close Checkpoint Debug Dependencies Integration History Undo Redo [Rule] Historically Lower Claim Customer

Info Data Samples

If

- Either If**
 - History.ClaimsCount180Days Less Than Or Equal To 2
- or If**
 - History.ClaimValue180Days Less Than 500

and History.NumberOfActivePolicies Greater Than Or Equal To 1

Then

- Result**
 - Outcome Data -10
- Else**
 - Outcome Data 5

Properties

▼ Default

Name
Historically Lower Claim Customer

▼ Output

- Show Else Result
- Show Missing Result

▼ Settings

Default Sample Set
[Dropdown] Pick Create

▼ Enabled

- Enabled
- Use Enabled Rules

Begin Date
[Date Picker]

End Date
[Date Picker]

▼ Rule Set

Order
[List Box]

▼ Service Settings

- Allow REST API Calls
- Create Service

▼ Statistics

- CaptureStatistics

▶ Default Inputs (1)

▶ UnitTests (1)

Business Rules: Truth Table

Save Close Checkpoint Debug Dependencies History Undo v Redo v					
Info					
Data Samples	Policy Application.AddressState In List	NOT Policy Application.InstrumentType Contains	History.LifetimeValue is in between	+	Result
	VA, FL, IL, PA, CA, NC, SC, DC	Guitar	-----		10
	DE, AK, NE, TX, AL	Drums	-----		15
	HI, AK	Other	50000 and 100000		25
	OH, TN, NY, GA	Piano	-----		10
	GA, NC, CA	Violin	0 and 0		0
Click To Add Row					
	<input checked="" type="checkbox"/> Has No Match Outcome				0

Business Rules: Matrix Rule

Save Close Debug Undo Redo Integration Dependencies [MatrixRule] Lead Assignment

Given Inputs [Direction, Channel, LeadSize] [EDIT INPUT DATA](#)

	Direction					
	Inbound			Outbound		No Matches
	Channel			Channel		
	AdWords	Email	No Matches	Dial	No Matches	
Number Ranges						
>\$1m	jones@agile.com	parr@agile.com	ibrahim@agile.com	omobou@agile.com	zatacan@agile.com	soloski@agile.com
500k - 999k	juarez@agile.com	richard@agile.com	kinesha@agile.com	tyler@agile.com	peshar@agile.com	bello@agile.com
<500k	fanadashian@agile.com	anne@agile.com	salazar@agile.com	huang@agile.com	patel@agile.com	bosco@agile.com
Not in Range	kim@agile.com	larry@agile.com	terrell@agile.com	nyleigha@agile.com	vanven@agile.com	sales@agile.com

[Settings]

BehaviorType
Default Matrix Rule Behavik

Settings

Rule Type
Matrix [Two Axis]

Enabled
 Enabled
 Use Enabled Rules

Begin Date

End Date

Service Settings
 Allow REST API Calls
 Create Service

Input Data

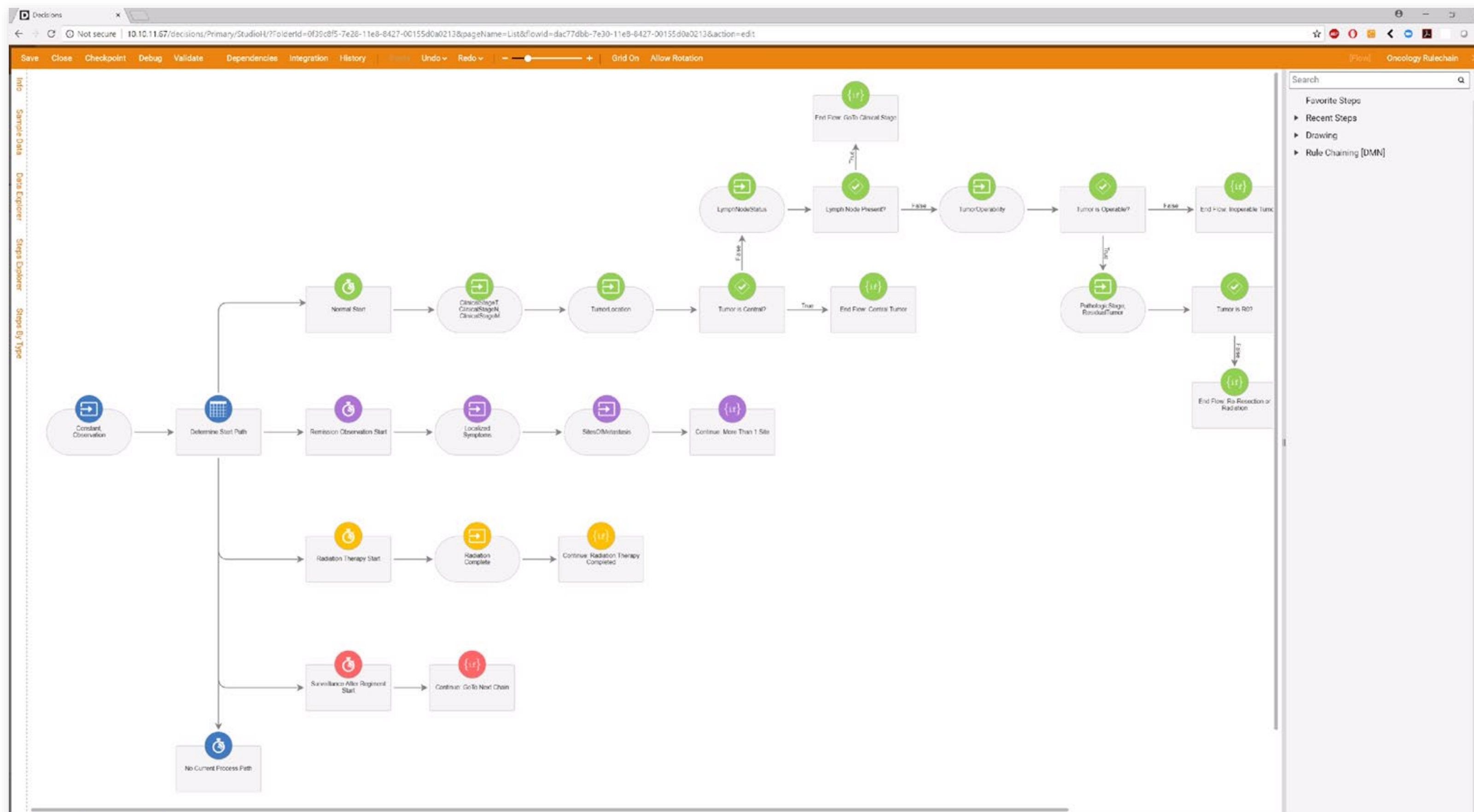
Inputs
 Direction (String) ×
 Channel (String) ×
 LeadSize (Decimal) ×

[Show Editor](#)

Output Data
 Allow Actions

Output Type
 String [Text] ×
 Is Array

Business Rules: Rule Chain



Data Structures

Edit Defined Data Structure □ ×

Structure Type Name

Name	Type	Is List
<input type="text" value="CardHolder"/>	<input type="text" value="String [Text]"/>	<input type="checkbox"/> ×
<input type="text" value="Security"/>	<input type="text" value="Int32 [Number]"/>	<input type="checkbox"/> ×
<input type="text" value="Exp"/>	<input type="text" value="Date Time"/>	<input type="checkbox"/> ×
<input type="text" value="Number"/>	<input type="text" value="String [Text]"/>	<input type="checkbox"/> ×
<input type="text" value="Type"/>	<input type="text" value="String [Text]"/>	<input type="checkbox"/> ×
<input type="text" value=""/>	<input type="text" value="String [Text]"/>	<input type="checkbox"/>

▼ Data Member Information

Is List

Allow Null (No Value)

▼ Display Information

Categories

Data

Display Label

Display Order

▼ Advanced

Override Database Field Name

Encrypt Data

SelectEditor

Configure Custom Attributes

Include Field In Description

Is Lookup List Key Field

▼ Caching

Flow Cache Key

▼ Visibility

Use Visibility Rule

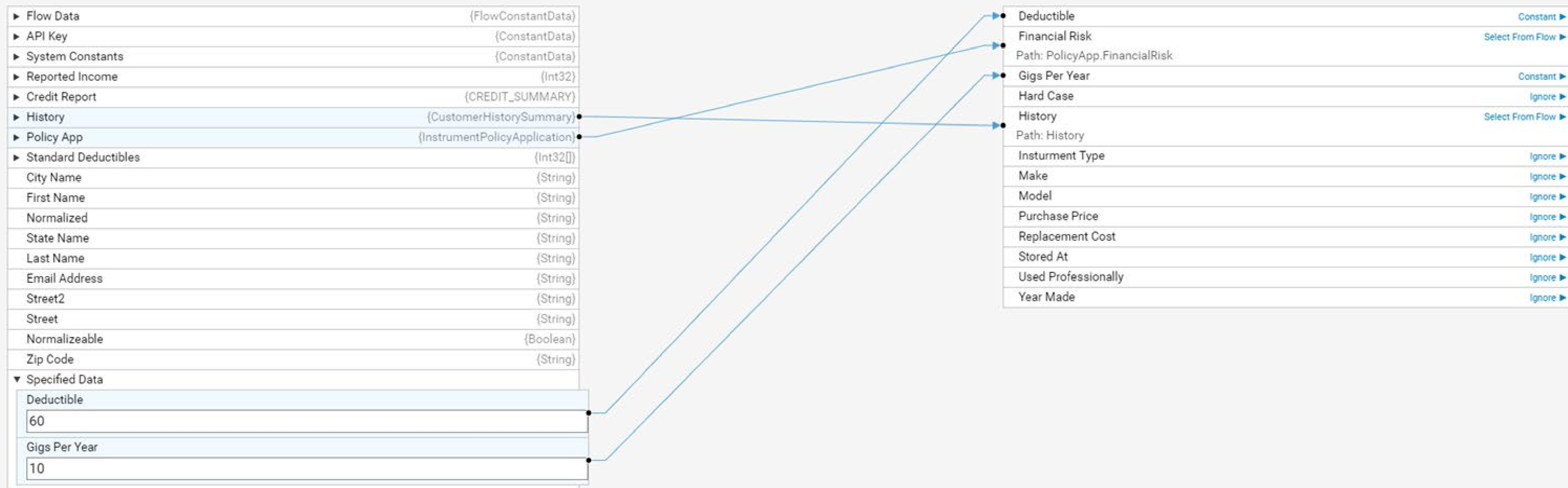
▼ Rules

[Quick Add](#) [Sort Properties](#)

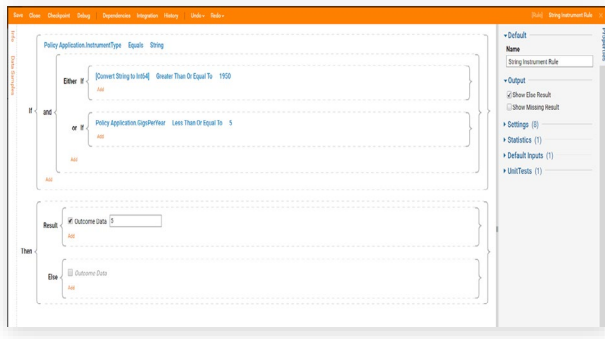
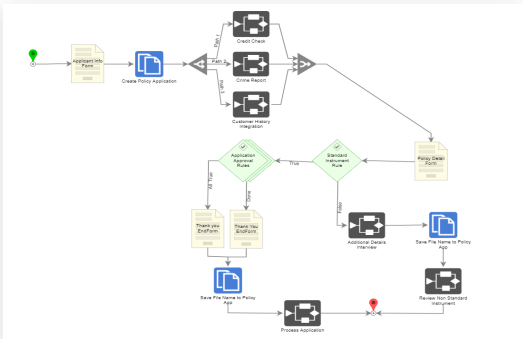
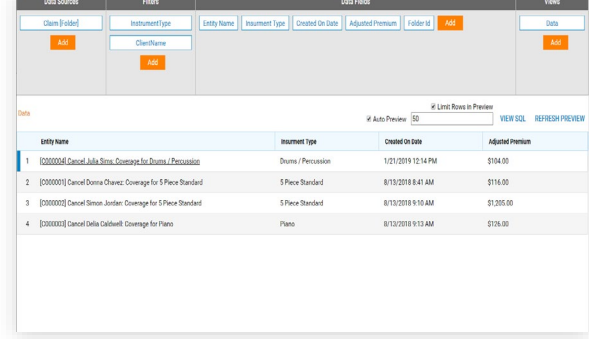
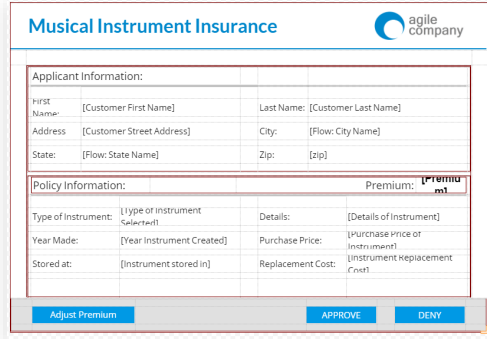
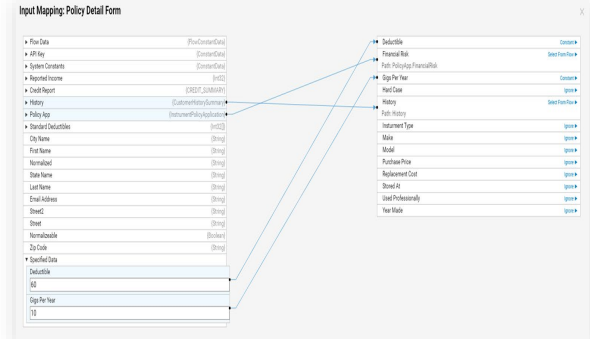
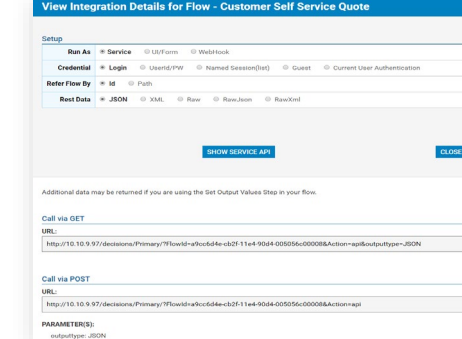
SAVE

Data Mapping

Input Mapping: Policy Detail Form


















Graphical No-Code Designers

	Rules	Workflow	Reports	Forms	Data Mapping	Integrations
						
Business User	Use Edit Create	Use Edit Create	Use Edit Create	Use		
Business Analyst	Edit Create	Edit Create	Edit Create	Edit Create	Use Edit Create	Use Edit Create
IT	Create	Create			Create	Create



Lead the Automation Revolution

Accounting	Insurance	Finance	Healthcare Services	Information Technology
Accounts Payable Workflow 	IBM ODM Migration 	Custom Billing 	Patient Forms 	Integration Validation 
Client Onboarding 	Case Management 	Invoice Approvals 	Sample Data Processing 	Real Time Data Management 
Property Tax Workflow 	Premium Calculation 	Collections Workflow 	Vaccination Scheduler 	IT Hardware Inventory 



Lead the Automation Revolution

Sales	Marketing	Lending	Human Resources	Information Technology
<p>Opportunity Management</p> 	<p>Prospecting New Business</p> 	<p>Loan Approvals</p> 	<p>Process Coaching</p> 	<p>Purchase Approvals</p> 
<p>Discount Approval Process</p> 	<p>Digital Form & Workflow Applications</p> 	<p>Loan To Value</p> 	<p>Critical Hiring Process</p> 	<p>Data Management</p> 
<p>Customer Portal</p> 	<p>Marketing Workflow</p> 	<p>Customer Experience</p> 	<p>Employee Equipment Onboarding</p> 	<p>Compliance Management</p> 

Decisions empowers business users to automate and optimize critical business processes.





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