



DOCUMENT GENERATION AND ESIGNATURE

# Quick Start

One document, generated from Salesforce data and signed without leaving the record.

CORE

**Core**

**\$6,500**

3 weeks

CORE + 2

Most popular

**Core plus 2**

**\$8,000**

3 to 4 weeks

CORE + 5

**Core plus 5**

**\$11,000**

4 to 5 weeks

**One base package, priced by the thing that drives the work**

This package is modular rather than tiered. Core delivers one standard template, one generation action and one signing flow. Every further template is an add-on at a published price, because the template is what consumes delivery time. The two illustrative bundles above are simply Core with two or five additional templates already included.

**Brysa Limited**

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# What you will have at launch

A Brysa Document Generation and eSignature Quick Start turns one of your existing documents into a repeatable, data-driven output that your team generates and sends for signature directly from a Salesforce record.

## Generate from data

Populate a document from Salesforce fields with one click.

## Keep branding right

Your approved layout and wording, every time.

## Send for signature

Route to signers without leaving the record.

## Track progress

See sent, viewed and signed status against the record.

## Store automatically

Signed documents filed back to the right record.

## Launch with confidence

Test, train, deploy and support the first weeks of use.

## Included in every scope

- Kick-off, discovery and confirmation of the selected scope
- Installation and configuration of the agreed document generation and eSignature solution
- Field mapping from Salesforce data into the document template
- Brysa testing, coordinated client UAT and production deployment
- Administrator and user enablement appropriate to the selected scope
- Remote post-launch hypercare for the stated period and hour allowance
- A defined route into ongoing support through a Brysa Care Plan

## STEP 0 · OPTIONAL

### Org Health Check

For organisations with an existing Salesforce org. One week to review current configuration, data quality, technical debt and licence position, ending in a short findings note and a firm fixed price for the build. The full fee is credited against any Quick Start package started within 60 days.

**\$2,000**

1 week

Credited on proceed

# Core and bundles

Core is the package. The bundles below are Core with additional templates included at the published add-on price, shown so you can see the total in one place. Any combination can be agreed in the Statement of Work.

| CAPABILITY                      | CORE · CORE                                | CORE + 2 · CORE PLUS 2           | CORE + 5 · CORE PLUS 5                         |
|---------------------------------|--------------------------------------------|----------------------------------|------------------------------------------------|
| <b>Fixed price</b>              | \$6,500                                    | \$8,000                          | \$11,000                                       |
| <b>Best fit</b>                 | One high-volume document, one signing flow | A small set of related documents | A document family across more than one process |
| <b>Standard templates</b>       | 1                                          | 3                                | 6                                              |
| <b>Document families</b>        | 1                                          | 1                                | Up to 2                                        |
| <b>Generation actions</b>       | 1                                          | Up to 2                          | Up to 3                                        |
| <b>Signing flows</b>            | 1                                          | 1                                | Up to 2                                        |
| <b>Signer roles per flow</b>    | Up to 3                                    | Up to 3                          | Up to 5                                        |
| <b>Conditional sections</b>     | Not included                               | Up to 5 per template             | Up to 10 per template                          |
| <b>Storage and filing rules</b> | Standard filing to the source record       | As Core                          | Filing rules for up to 2 destinations          |
| <b>Reporting</b>                | 2 reports                                  | 3 reports                        | 5 reports and 1 dashboard                      |
| <b>Training</b>                 | Admin and user sessions                    | Admin and user sessions          | Expanded admin and user enablement             |
| <b>UAT</b>                      | 1 cycle                                    | 1 cycle plus retest              | 2 cycles plus regression retest                |
| <b>Hypercare</b>                | 10 days, up to 3 hours                     | 21 days, up to 6 hours           | 30 days, up to 8 hours                         |
| <b>Typical delivery</b>         | 3 weeks                                    | 3 to 4 weeks                     | 4 to 5 weeks                                   |

*All limits are maximums within the fixed-price package and are confirmed in the configuration workbook after discovery.*

## What makes a template standard

A standard template uses final approved client-supplied Word content, fixed branding, limited conditional logic, no clause library, no document redesign and no complex nested tables or dynamic pagination. Anything outside that definition is quoted separately, because those are the features that turn a two-day build into a two-week one.

## C O R E

## Core

\$6,500

One standard template, one generation action and one signing flow, delivered end to end and ready for daily use.

Typical delivery: 3 weeks

| WORKSTREAM                    | WHAT BRYSA WILL DELIVER                                                                                                                                                                                                                                                                                                         | INCLUDED LIMIT                                    |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|
| <b>Discovery and design</b>   | <ul style="list-style-type: none"> <li>— Kick-off and one requirements workshop of up to 2 hours</li> <li>— Confirm the document, the source object, the signer roles and acceptance criteria</li> <li>— Configuration workbook and agreed delivery plan</li> </ul>                                                             | <b>1 document</b><br><b>1 process</b>             |
| <b>Solution set-up</b>        | <ul style="list-style-type: none"> <li>— Installation and configuration of the agreed document generation and eSignature solution</li> <li>— Connection to the Salesforce org and permission configuration for nominated users</li> <li>— Sender identity and branding configuration for outbound signature requests</li> </ul> | <b>1 solution</b><br><b>1 org</b>                 |
| <b>Template build</b>         | <ul style="list-style-type: none"> <li>— One standard template built from final approved client-supplied Word content</li> <li>— Field mapping from the source object and up to 2 related objects</li> <li>— One repeating table or line-item section where required</li> </ul>                                                 | <b>1 template</b><br><b>3 objects mapped</b>      |
| <b>Generation and signing</b> | <ul style="list-style-type: none"> <li>— One generation action available from the agreed record page</li> <li>— One signing flow with up to 3 signer roles and agreed signing order</li> <li>— Standard reminder and expiry settings</li> </ul>                                                                                 | <b>1 action</b><br><b>1 signing flow</b>          |
| <b>Storage and tracking</b>   | <ul style="list-style-type: none"> <li>— Signed and unsigned documents filed automatically against the source record</li> <li>— Status tracking fields so users can see sent, viewed and signed progress</li> <li>— Up to 3 validation rules or data-quality controls to protect generation</li> </ul>                          | <b>1 destination</b><br><b>3 validation rules</b> |
| <b>Reporting</b>              | <ul style="list-style-type: none"> <li>— Configure 2 agreed reports covering generation and signature completion</li> <li>— One review of the reporting outputs with the nominated owner</li> </ul>                                                                                                                             | <b>2 reports</b>                                  |
| <b>Test, train and launch</b> | <ul style="list-style-type: none"> <li>— Brysa testing across the agreed data scenarios and one client UAT cycle</li> <li>— Production deployment and launch checklist</li> <li>— One 90-minute administrator session and one 60-minute user session</li> </ul>                                                                 | <b>1 UAT cycle</b><br><b>2 sessions</b>           |
| <b>Post-launch support</b>    | <ul style="list-style-type: none"> <li>— Remote support for questions, defects and minor corrections within the agreed scope</li> <li>— Unused hours expire at the end of the support period</li> <li>— Continues seamlessly into a Care Plan where selected</li> </ul>                                                         | <b>10 days</b><br><b>3 hours</b>                  |

CORE + 2

## Core plus 2

**\$8,000**

Core plus two additional standard templates and conditional content, for a small set of related documents.

Typical delivery: 3 to 4 weeks

| WORKSTREAM             | WHAT BRYSA WILL DELIVER                                                                                                                                                                                                                                         | INCLUDED LIMIT                                 |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|
| Everything in Core     | <ul style="list-style-type: none"><li>— The full Core scope as set out on the previous page</li><li>— Extended discovery of up to 3 hours to cover the additional documents</li></ul>                                                                           | <b>1 process</b><br><b>3 workshop hours</b>    |
| Additional templates   | <ul style="list-style-type: none"><li>— Two additional standard templates from final approved client-supplied content</li><li>— Field mapping reviewed across all three templates for consistency</li><li>— Up to 5 conditional sections per template</li></ul> | <b>3 templates</b><br><b>5 conditions each</b> |
| Generation and signing | <ul style="list-style-type: none"><li>— Up to 2 generation actions across the agreed record pages</li><li>— One signing flow with up to 3 signer roles</li><li>— Template selection logic where more than one template applies to a record</li></ul>            | <b>2 actions</b><br><b>1 signing flow</b>      |
| Reporting              | <ul style="list-style-type: none"><li>— Configure 3 agreed reports covering generation and signature completion by template</li></ul>                                                                                                                           | <b>3 reports</b>                               |
| Test, train and launch | <ul style="list-style-type: none"><li>— Brysa testing, one client UAT cycle and one correction and retest period</li><li>— Production deployment and launch checklist</li><li>— Administrator and user enablement totalling up to 4 hours</li></ul>             | <b>1 UAT cycle</b><br><b>4 training hours</b>  |
| Post-launch support    | <ul style="list-style-type: none"><li>— Remote support for questions, defects and minor corrections within the agreed scope</li><li>— Continues seamlessly into a Care Plan where selected</li></ul>                                                            | <b>21 days</b><br><b>6 hours</b>               |

CORE + 5

## Core plus 5

\$11,000

Core plus five additional templates across up to two document families, with a second signing flow.

Typical delivery: 4 to 5 weeks

| WORKSTREAM                       | WHAT BRYSA WILL DELIVER                                                                                                                                                                                                                                                            | INCLUDED LIMIT                                  |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|
| <b>Everything in Core plus 2</b> | <ul style="list-style-type: none"> <li>— The full Core and Core plus 2 scope as set out on the previous pages</li> <li>— Extended discovery of up to 5 hours across both document families</li> </ul>                                                                              | <b>2 families</b><br><b>5 workshop hours</b>    |
| <b>Additional templates</b>      | <ul style="list-style-type: none"> <li>— Five additional standard templates from final approved client-supplied content</li> <li>— Up to 10 conditional sections per template</li> <li>— Shared component review so common sections behave consistently</li> </ul>                 | <b>6 templates</b><br><b>10 conditions each</b> |
| <b>Generation and signing</b>    | <ul style="list-style-type: none"> <li>— Up to 3 generation actions across the agreed record pages</li> <li>— Up to 2 signing flows with up to 5 signer roles each</li> <li>— Agreed signing order, reminders and expiry per flow</li> </ul>                                       | <b>3 actions</b><br><b>2 signing flows</b>      |
| <b>Storage and tracking</b>      | <ul style="list-style-type: none"> <li>— Filing rules for up to 2 destinations, such as the source record and a related account</li> <li>— Extended status tracking across both document families</li> </ul>                                                                       | <b>2 destinations</b>                           |
| <b>Reporting</b>                 | <ul style="list-style-type: none"> <li>— Configure 5 agreed reports and 1 dashboard covering volume, completion and turnaround</li> <li>— One reporting review with senior stakeholders</li> </ul>                                                                                 | <b>5 reports</b><br><b>1 dashboard</b>          |
| <b>Test, train and handover</b>  | <ul style="list-style-type: none"> <li>— Brysa testing and two client UAT cycles with correction and regression retest</li> <li>— Production deployment, launch checklist and administration handover guide</li> <li>— Up to 6 hours of administrator and user training</li> </ul> | <b>2 UAT cycles</b><br><b>6 training hours</b>  |
| <b>Post-launch support</b>       | <ul style="list-style-type: none"> <li>— Remote support for questions, defects and minor corrections within the agreed scope</li> <li>— Continues seamlessly into a Care Plan where selected</li> </ul>                                                                            | <b>30 days</b><br><b>8 hours</b>                |

## Add-ons and ongoing care

This package is modular by design. The add-on menu is the mechanism, not the exception — most engagements combine Core with two or three items from the list below.

### Fixed-price add-ons

| ADD-ON                                                     | FIXED PRICE       | TYPICAL EFFECT ON TIMELINE |
|------------------------------------------------------------|-------------------|----------------------------|
| Additional document family                                 | \$1,900           | +2 to 3 days               |
| Additional signing flow                                    | \$1,300           | +1 to 2 days               |
| Additional standard template                               | \$1,000           | +1 day                     |
| Additional generation action                               | \$1,000           | +1 day                     |
| Report pack (5 reports, 1 dashboard)                       | \$1,000           | +1 to 2 days               |
| Additional filing destination                              | \$700             | +0.5 day                   |
| Additional training session (90 minutes)                   | \$700             | No change                  |
| Non-standard template (clause library, complex pagination) | Quoted separately | Assessed first             |

*Add-on prices are the same whether agreed at Statement of Work stage or raised during delivery, and are invoiced with the second instalment.*

## Brysa Care Plans

Documents change — new wording, new fields, a new signer role. A Care Plan begins the day hypercare ends, so template changes have somewhere to go instead of becoming a new project. For most document deployments we recommend Essentials.

|                                       | ESSENTIALS    | ACTIVE        | PARTNER        |
|---------------------------------------|---------------|---------------|----------------|
| <b>Monthly fee</b>                    | \$750         | \$1,600       | \$3,000        |
| <b>Included hours</b>                 | Up to 3 hours | Up to 7 hours | Up to 15 hours |
| <b>Reactive support</b>               | Yes           | Yes           | Yes, priority  |
| <b>Small changes and fixes</b>        | Yes           | Yes           | Yes            |
| <b>Scheduled change window</b>        | Not included  | Monthly       | Fortnightly    |
| <b>Business review</b>                | Not included  | Quarterly     | Monthly        |
| <b>Roadmap and optimisation input</b> | Not included  | Not included  | Included       |
| <b>Named Brysa administrator</b>      | Not included  | Not included  | Included       |

### Commit at Statement of Work stage

Where a Care Plan is agreed alongside the Quick Start, Brysa applies a 10% discount to the first six months. Care Plans run on a rolling basis with 30 days' notice, and unused hours do not carry forward.



# How the Quick Start is delivered

Brysa uses a structured delivery sequence so decisions are made early, configuration stays within the agreed scope and your team reaches production quickly.

|                                                                     |                                                           |                                                         |                                                           |                                                               |
|---------------------------------------------------------------------|-----------------------------------------------------------|---------------------------------------------------------|-----------------------------------------------------------|---------------------------------------------------------------|
| <b>1</b>                                                            | <b>2</b>                                                  | <b>3</b>                                                | <b>4</b>                                                  | <b>5</b>                                                      |
| <b>Discover</b>                                                     | <b>Design</b>                                             | <b>Build</b>                                            | <b>Validate</b>                                           | <b>Launch</b>                                                 |
| Confirm the document, source data, signers and acceptance criteria. | Agree the configuration workbook and template definition. | Configure the solution, build templates and map fields. | Test across data scenarios, complete UAT and train users. | Deploy to production and begin the included hypercare period. |

## Typical timetable

| PERIOD        | CORE                        | CORE PLUS 2                 | CORE PLUS 5                           |
|---------------|-----------------------------|-----------------------------|---------------------------------------|
| <b>Week 1</b> | Discover, design and set up | Discover, design and set up | Discovery and template definition     |
| <b>Week 2</b> | Template build and mapping  | Template build and mapping  | Solution set-up and first templates   |
| <b>Week 3</b> | UAT, train and deploy       | Signing, reporting and UAT  | Remaining templates and signing flows |
| <b>Week 4</b> | Hypercare                   | Train, deploy and hypercare | Reporting, testing and first UAT      |
| <b>Week 5</b> | Not applicable              | Not applicable              | Second UAT, training and deployment   |

## When the clock starts

The delivery period begins once the Statement of Work is signed, the required Salesforce and document solution licences and access are available, the nominated decision-maker is confirmed and the final approved document content has been supplied in Word format. Client delays move the delivery dates accordingly.

## Decision and feedback cadence

- Brysa records all agreed decisions in the configuration workbook.
- The client provides one consolidated response at each review point.
- Feedback and approvals are expected within two working days unless otherwise agreed.
- New requirements raised during review are assessed as additional scope and priced from the add-on menu where applicable.

# Definitions and responsibilities

The definition of a standard template is the single most important clause in this document, because it is what keeps the fixed price fixed.

| TERM                       | WHAT IT MEANS IN THIS PACKAGE                                                                                                                                                                                     |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Standard template</b>   | One document built from final approved client-supplied Word content, using fixed branding, limited conditional logic, no clause library, no document redesign and no complex nested tables or dynamic pagination. |
| <b>Document family</b>     | A group of templates sharing one source object, one broad layout and a common field mapping — for example a quote, an order form and a renewal notice on the same object.                                         |
| <b>Generation action</b>   | One button or action available from one record page that produces a document from agreed data.                                                                                                                    |
| <b>Signing flow</b>        | One configured signature journey with an agreed signer order, reminder settings and expiry behaviour.                                                                                                             |
| <b>Conditional section</b> | One block of content that appears or is suppressed based on one agreed data condition.                                                                                                                            |
| <b>Clause library</b>      | A managed set of interchangeable legal clauses with version control and approval. Not included in any standard scope.                                                                                             |
| <b>Hypercare</b>           | Remote questions, defect correction and minor adjustments to the agreed implementation during the stated period and hour allowance.                                                                               |
| <b>Care Plan</b>           | An ongoing monthly service covering support, small changes and, at higher levels, scheduled change windows and review sessions.                                                                                   |

## What Brysa needs from you

- Appropriate Salesforce and document solution licences and administrator access
- A nominated decision-maker empowered to approve document content and scope
- Final approved document content supplied in Word format, signed off by legal where relevant
- Confirmed branding assets, fonts and logo files
- Agreed signer roles, signing order and reminder expectations
- Representative sample records covering the data scenarios to be tested
- Named users to carry out UAT and provide one consolidated issue list
- Attendance at the agreed training sessions

# What is not included

The following work sits outside all three standard scopes unless it is expressly added to the Statement of Work. Where an item is needed, Brysa will scope and price it separately.

- Salesforce, document generation or eSignature licences and subscription fees
- Document design, copywriting, legal drafting or content restructuring
- Clause libraries, version control of legal content or approval workflows for clauses
- Complex nested tables, dynamic pagination or pixel-perfect recreation of a legacy layout
- Contract lifecycle management, obligation tracking or renewals automation
- CPQ, Revenue Cloud or complex pricing logic feeding the document
- Third-party integrations, middleware or API development
- Apex, Visualforce, Lightning Web Components or other bespoke code
- Bulk generation, batch processing or high-volume scheduled document runs
- Full change management, ongoing administration or additional UAT cycles

## Support, defects and additional requirements

| AREA                         | HOW IT IS HANDLED                                                                                                                                                 |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Included hypercare</b>    | Remote support during UK business hours for questions, agreed-scope defects and minor corrections, limited to the package allowance and period.                   |
| <b>Defect</b>                | An agreed item does not operate in accordance with the approved configuration workbook or acceptance criteria. Defects are corrected at no additional cost.       |
| <b>Enhancement</b>           | A new asset, process, report, automation or other requirement not approved in the package scope.                                                                  |
| <b>Additional scope</b>      | Brysa will explain the impact and provide a fixed price from the add-on menu or a separate estimate. No chargeable work begins without written approval.          |
| <b>Client delay or pause</b> | Delivery dates move where information, access, content, testing or decisions are delayed. A project paused for more than 20 working days may require re-planning. |

## Commercial terms and next steps

| TERMS                       |                                                                                                                                                                                                                               |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Fixed prices</b>         | Core \$6,500 · Core plus 2 \$8,000 · Core plus 5 \$11,000                                                                                                                                                                     |
| <b>Additional templates</b> | \$1,000 each, at the same price whether agreed at Statement of Work stage or during delivery.                                                                                                                                 |
| <b>Org Health Check</b>     | \$2,000, credited in full against any package commenced within 60 days.                                                                                                                                                       |
| <b>Payment</b>              | 50% on commencement and 50% on UAT sign-off. Add-ons are invoiced with the second instalment.                                                                                                                                 |
| <b>Care Plans</b>           | Billed monthly in advance from the day hypercare ends. Rolling term with 30 days' notice.                                                                                                                                     |
| <b>Acceptance</b>           | The client reviews the agreed acceptance criteria during UAT. The solution is accepted when material in-scope defects are resolved, or five working days after production deployment if no material defect has been reported. |
| <b>Validity</b>             | All prices are in US dollars and are the total professional services fee for the agreed scope. Valid for 60 days from the date of issue.                                                                                      |

### Select the right starting point

#### Core

Choose this when one high-volume document is causing most of the manual effort.

#### Core plus 2

Choose this when a small set of related documents shares the same data and process.

#### Core plus 5

Choose this when documents span more than one process and need a second signing flow.

## Let us confirm the right starting point

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Every Quick Start begins with a short, no-obligation suitability call. It takes about thirty minutes and confirms three things: how many templates you actually need, whether each one meets the standard template definition, and what we would each need to have ready before the clock starts.

### Next step

Brysa will hold a short suitability call to confirm the templates in scope, your Salesforce environment and the prerequisites. We will then issue the Statement of Work and agree the kick-off date.

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### Satish Thiagarajan

Chief Executive Officer, Brysa Limited

*This document describes Brysa's standard Document Generation and eSignature Quick Start packages. The signed Statement of Work governs the engagement.*