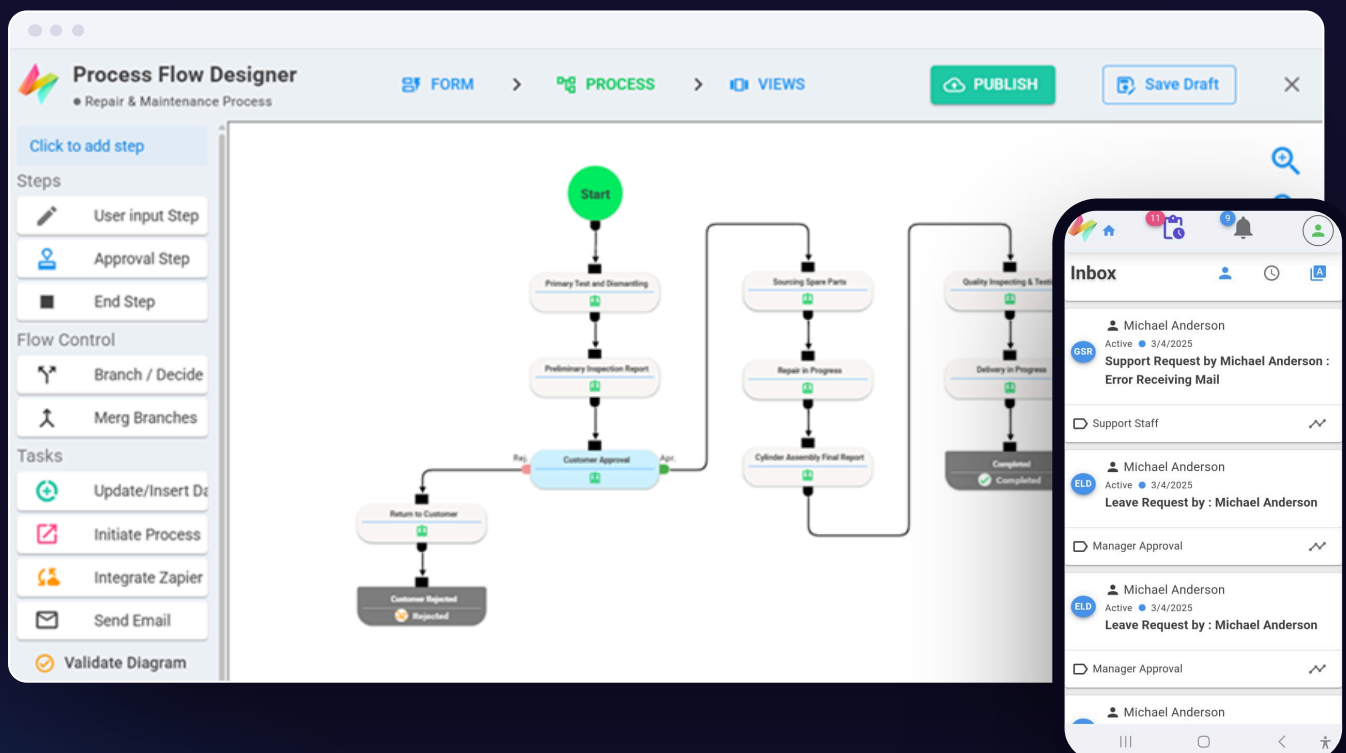


PRODUCT PROFILE

Get work out of inboxes and spreadsheets — and into workflows that run themselves.

NileDesk is a no-code workflow automation platform with AI built in. Teams design their own forms, approval flows, boards and documents, and managers see every item, step and deadline in one place.



EXECUTIVE SUMMARY

One place for the processes your teams run every day

Most organisations already have processes — leave requests, purchase approvals, IT tickets, inspections, client onboarding. The problem is where they live: in email threads, chat messages and spreadsheets that only one person updates. NileDesk gives each process a proper home, with an owner for every step and a record of every decision.

The challenge for managers

- ⊗ Approvals wait in someone's inbox and nobody knows since when
- ⊗ "What's the status?" is answered by chasing people
- ⊗ Forms, trackers and documents are spread across tools
- ⊗ Small process changes queue behind larger IT projects
- ⊗ Invoices, letters and reports are rebuilt by hand
- ⊗ No reliable record of who decided what, and when

What changes with NileDesk

- ✓ Every request follows the same defined steps and owners
- ✓ Each person works from one inbox — on web or mobile
- ✓ Dashboards show status, overdue items and missed deadlines
- ✓ Business teams build and adjust processes without code
- ✓ Documents are generated from the data as PDFs
- ✓ Every input and decision is kept in the item's history

Who it is for



Operations managers

Bring structure and visibility to cross-team processes.



Department heads

Build the workflows your team needs, without waiting on IT.



IT leaders

Enable teams with roles, permissions and a choice of deployment.



Service teams

Track every request from first message to resolution.

Key facts

APPROACH

No-code designers, AI-assisted

DEPLOYMENT

Cloud on Microsoft Azure, or self-hosted

ACCESS

Web, Android app, installable web app

CONNECTS TO

Slack, Jira, WhatsApp, Zapier, REST, API, MCP

TRY IT

30 days, 10 users, all features, no card

WHAT MAKES NILEDESK DIFFERENT

Complete solutions

Forms, flows, boards, data, documents and reports in one platform — not just a form builder.

No-code with AI

Build visually or from a description; use AI only where you want it, with reviewable decisions.

Your deployment

Managed cloud on Azure, or self-hosted with a one-time licence and your own AI model.

Reaches people

Web, Android, WhatsApp and website agents — plus MCP for AI assistants.

HOW IT WORKS

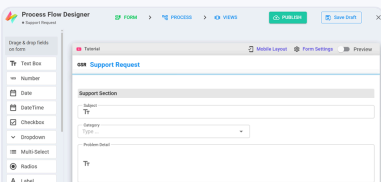
From idea to a running process in three steps

Processes are built visually by the people who know them best. When something changes, you edit and publish — the team is on the new version straight away.

1

Design the form

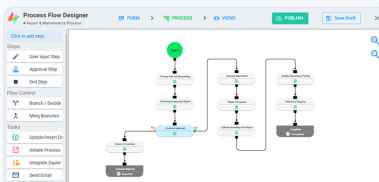
Drag in text, numbers, dates, dropdowns, tables, attachments, signatures, locations and lookups into your own data. Add validations and calculations.



2

Draw the flow

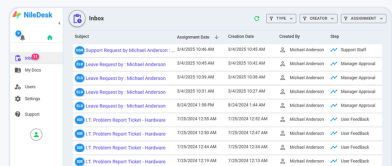
Add input and approval steps, branches and automated tasks — update data, start another process, send an email, call an integration.



3

Publish and track

Work lands in each person's inbox. Notifications go out on web, push and email, and you see status, deadlines and history for every item.



Three ways to start



From a QuickStart solution

Install a ready-made, connected setup — e.g. leave requests, onboarding, IT support, change management — and adapt it.



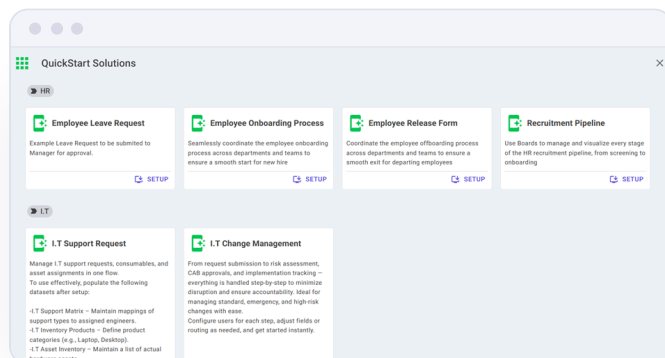
From a description

Describe the process in plain language and AI drafts the form and workflow as a starting point you refine.



From a blank canvas

Build exactly what you need with the visual form, process, board and dataset designers.



QuickStart solutions

Complete, pre-built setups — process flows, boards, datasets and forms already connected — grouped by department, including HR, IT and ISO. Fully editable once installed.

Employee Leave Request

Employee Onboarding

Employee Release

Recruitment Pipeline

IT Support Request

IT Change Management

Customer Support Tickets

Sales Pipeline

Purchase Orders

THE PLATFORM

The building blocks of any business process

The same components power a two-step leave request and a multi-department repair process — so one platform can grow with your organisation's needs.



Process flows

Input and approval steps, branches on conditions, expressions or AI rules, deadlines and automated tasks.



Boards

Kanban-style boards for tickets, cases, pipelines and work that moves freely between stages.



Datasets & data forms

Your own reference data — products, vendors, assets — that forms read and processes update. Import from Excel/CSV.



PDF documents

Design invoices, certificates and reports once; generate them from any record and attach them to emails.



Reports & dashboards

Overview dashboards, charts, tabular and pivot reports, filtered views and data tags. Export to Excel/CSV.



Scheduling

Create recurring items automatically — daily, weekly, monthly or yearly — for checks and maintenance.



Integrations & API

Slack, Jira and WhatsApp steps, Zapier for thousands of apps, custom REST calls and a public API.



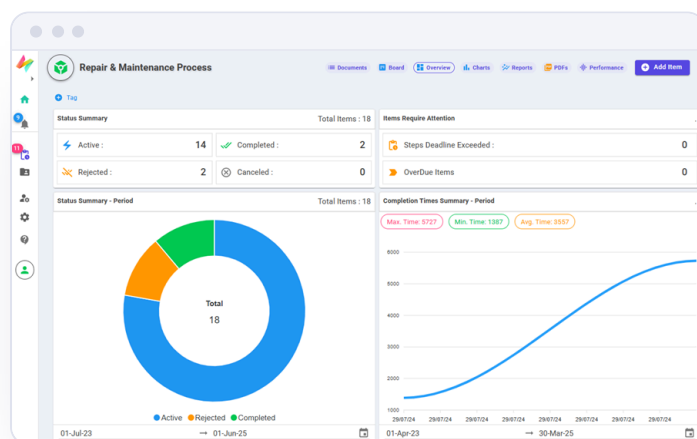
Roles & permissions

Default and custom roles per template; user groups, managers and delegation when someone is away.



Mobile

Android app, installable web app with push notifications, or any mobile browser.



Process overview: status summary, items needing attention and completion times.

VISIBILITY FOR MANAGERS

Know where everything stands — without asking

- ✓ Status of every item by process and period
- ✓ Overdue items and exceeded step deadlines surfaced automatically
- ✓ Completion-time trends and a performance view per process
- ✓ Board, list, chart and report views of the same data
- ✓ Full history of inputs and decisions on each item

AI & AGENTS

AI where it helps. Rules where you need them.

Use AI to build faster and to handle judgement calls at runtime — or keep fully deterministic rules. You decide what AI can see, and you can review why it made each decision.

While you build

- ✓ Generate forms, processes and datasets from a description
- ✓ Design or improve PDF, email and notification templates
- ✓ Explain a calculation and let AI write the expression

While work runs

- ✓ Route items using business rules written in plain language
- ✓ Choose assignees, priorities and deadlines from the content
- ✓ Turn free text into structured fields, values or summaries



You stay in control. Every AI-driven decision can be reviewed — what it decided and why. You limit the context AI can access, mix AI and deterministic steps, or don't use AI at all.

AGENTS & MCP

Let people — and AI assistants — work with your processes



WhatsApp agents

Customers, tenants or staff create requests and check their status by chatting. Unknown senders can be filtered out before AI is involved.



Website agents

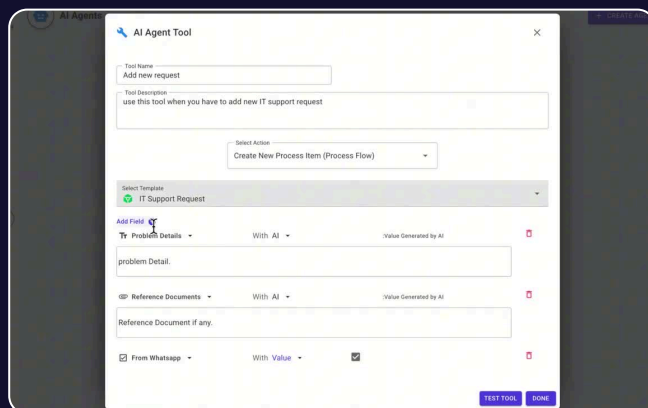
Embed an agent on your site with an iframe; it loads only on the domains you allow.



MCP servers

Expose selected actions — start items, approve, find or update records — to MCP-capable AI assistants such as Claude.

- ✓ No-code agent builder inside NileDesk
- ✓ Instructions, validation rules, tools and memory per agent
- ✓ Agents act as a defined user, so permissions still apply
- ✓ Requests created by agents follow your normal process



WHERE TEAMS USE NILEDESK

Built for the processes every organisation runs

Start with the one process that causes the most follow-up messages today, then add the next.

Typical starting points by department:

Department	Typical processes	Features that matter
IT	Support requests, change management, asset & consumables tracking, access requests	Routing by category, boards, Jira/Slack escalation
Human Resources	Leave requests, onboarding, offboarding & clearance, recruitment pipeline, HR letters	Manager-based approval, signatures, PDF letters
Procurement	Purchase requests, purchase orders, vendor onboarding, goods receipt, quotation comparison	Amount-based routing, PO PDFs, dataset updates
Finance	Expense claims, invoice approval, payment requests, budget requests, month-end checklists	Calculations, audit history, Excel/CSV export
Sales & Marketing	Sales pipeline, discount approvals, quotes & invoices, campaign requests	Boards, datasets, PDF documents, Zapier/REST
Legal & Compliance	Contract review, policy approvals, compliance checklists, incident reporting	Decision history, permissions, self-hosting
Customer Service	Support tickets, field service & repairs, complaints, client onboarding	WhatsApp/web agents, deadlines, mobile forms

Industries

Construction & engineering

Site inspections, material requests, change orders and safety incidents — from the field on mobile.

Education & training

Admissions, staff requests, course approvals and certificates.

Healthcare & life sciences

Equipment maintenance, supply requests, incident reporting and lab reports.

Government & public sector

Applications, permits, citizen requests and internal approvals with traceable steps.

NGOs & non-profits

Field data collection, beneficiary registration, grant and procurement approvals.

Real estate & property

Tenant maintenance requests, inspections, lease approvals and work orders.

DEPLOYMENT, SECURITY & GOVERNANCE

Your cloud, or ours — with control either way

Run NileDesk as a managed service on Microsoft Azure, or install it on your own servers with a one-time licence. Administrators decide who can design, run and see what.

	NileDesk Cloud	Self-hosted
Where it runs	Managed by NileDesk on Microsoft Azure	On your own infrastructure
Licence	Subscription based on users and monthly usage (from 10 users)	One-time licence based on users (from 50 users), optional support & maintenance
Usage limits	Sized to your needs	No limits on templates, items or documents
AI	Optional	Bring your own AI model
Sign-in	NileDesk, Google or Microsoft accounts	NileDesk accounts
Mobile	Android app and installable web app	Installable web app
Email & storage	Included (1 GB data + 1 GB attachments per user)	Your own email server and storage
Integrations	Slack, Jira, WhatsApp, Zapier, REST, API	Slack, Jira, WhatsApp, REST, API (no Zapier)

Built-in controls



Roles & permissions

Default and custom roles per process, board, dataset and form — from viewing items to managing the template.



Activity history

An events log and the full history of user inputs and decisions on every item.



Design rights

Creating or installing templates requires a role granted by an administrator.



Explainable AI

See what each AI-driven decision was and why, and limit the context AI can access.



Scoped agents & MCP

Agents load only on allowed domains; MCP servers expose only the actions you choose.



Data protection

On Cloud: encrypted storage, secure APIs, role-based access and continuous backups. Data exportable to Excel/CSV.

GETTING STARTED

A practical path to your first results

Suggested first 30 days

WEEK 1 · CHOOSE & BUILD

Pick one process that causes frequent follow-ups. Install a matching QuickStart solution or let AI draft it, and adjust fields, steps and approvers.

WEEK 2 · PILOT

Invite the people involved and run real items through it. Collect their feedback on the form and routing.

WEEK 3 · REFINE

Adjust the process, add notifications, a PDF document or a report. Set up dashboards for the manager.

WEEK 4 · DECIDE

Review the overview and history with stakeholders, then choose the next process and the plan that fits.

Questions to answer during your evaluation

- ✓ Can the people who own the process build and change it themselves?
- ✓ Does every step have a clear owner and deadline?
- ✓ Can managers see status and bottlenecks without asking?
- ✓ Does the team use it on the devices they already have?
- ✓ Are the right documents produced automatically?
- ✓ Can we answer "who decided what, and when?" for any item?
- ✓ Does it connect to the systems we rely on?
- ✓ Cloud or self-hosted — which fits our data policies?

Plans



Free trial

30 days · up to 10 users · every feature including AI · 10 active templates · 200 items per month · no credit card.



Cloud

Tailored quote based on users and monthly usage, from 10 users. Includes 2 hours of personalised training and in-app support during business hours.



Self-hosted

One-time licence based on number of users, from 50 users. No recurring licence fee; optional support and maintenance plans.

Need help setting up? The NileDesk team can also implement your processes for you (an implementation fee may apply).

See your own process running

Start a free trial, book a demo built around your process, or request a tailored quote.

[Start free trial](#)
[Book a demo](#)
[Request a quote](#)

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