

# Streamline Salesforce (SFDC) Processes with Salesforce iBoT from Perpetuuti's **Plug-and-Play iBoT Store**

Seamless Integration.  
Cost Reduction.  
Improved Efficiency.



## What does the Salesforce (SFDC) iBoT do?

Today CRM systems like Salesforce are becoming a mandatory part of organizations to run their business successfully. However, for managing any CRM software, companies have to allocate a large amount of resources to perform various repetitive tasks. This increase in the overall expenditure due to resource allocation stops many small businesses from taking advantage of CRMs. One of the most compelling ways to improve the overall effectiveness of Salesforce is by using intelligent automation. It is an ideal option enabling businesses to automate simple, repetitive, rule-based and high-volume tasks within the SFDC.



Salesforce (SFDC) iBoT from Perpetuuiti can streamline a plethora of processes, including creating new job, changing the job, creating a new case, closing the case, downloading the case list with provided inputs and so on. The iBoT basically logs in to the SFDC application and connects with Excel sheet to perform these tasks and many more.

## How is Perpetuuiti's Salesforce iBoT Unique in the Market?

Our commitment to intelligent automation, easy integrations and non-intrusive deployments makes our Plug-and-Play intelligent BoTs unique in the market.



AI-powered  
Automation  
Solution



Scalable & Efficient  
Automation  
Solution



Easy Integration with  
Existing Systems to  
Get Going in Days



Ease of Use &  
Configuration Without  
Technical Support



## Tasks Performed by the Salesforce iBoT iBoT

 Creating Job Information

 Changing Job Information

 Getting Job Information

 Closing Cases from Excel

 Creating Cases from Excel

 Generating Connection Tokens

 Downloading the Cases' List with Provided Inputs

 Saving the Status in the Output Excel Sheet

## Streamline Key Tasks on Salesforce and Enjoy Benefits with Perpetuuti's Salesforce iBoT



### Cost Reduction

By automating a considerable number of routine and non-revenue generating manual tasks related to Salesforce application.



### Improved Efficiency

Human resources work for a particular time duration, but this iBoT can work 24\*7 if needed. Moreover, it can also perform multiple & complex tasks at a single go.



### Error Reduction

Data entry errors in Salesforce can happen because of human mistakes like lack of concentration or others. iBoT can perform these tasks at 100% accuracy.



### Ease of Use

Easy to use and integrate into new or existing tasks without any technical supervision.



### Seamless Integration

Quick and seamless integration with sales system..



### Non-intrusive

Does not change the underlying logic or business rule – ensures data goes through the same rules for consistency with the applications' business rules and logic.

## Setup Process



### Prerequisites/ Inputs

- ⇒ Testing data to build the model such as Microsoft Excel, details of the job and all the business rules.
- ⇒ Other mandatory fields.
- ⇒ Hardware and Software requirements – Salesforce iBoT, Server and Av3ar Control Room as per the Av3ar prerequisite document.

### Implementation

- ⇒ Download and Install the Salesforce iBoT, Server, and Av3ar Control Room in your environment (Read the Av3ar Installation guide).
- ⇒ Configure the Server and Bot Details
- ⇒ Map the workflow to the Job
- ⇒ Trigger the Job.
- ⇒ That's it - Now the bot is ready to get going.



Deploy the Salesforce iBoT in 10 Days with our Implementation Support

## We Have a Ready-To-Go (OOTB) Smart iBoT for Every Business Process



HRMS iBoT



OCR iBoT



ID Management iBoT



Accounts Payable iBoT



Accounting iBoT



Supply Chain iBoT



Healthcare iBoT



Data Entry iBoT



Data Clearance iBoT



Windows iBoT



Office 365 iBoT



Sales iBoT



SFDC CRM iBoT



Sugar CRM iBoT



SAP iBoT

## About iBoT Store from Perpetuuiti

Perpetuuiti's iBoT Store accelerates your robotic process automation initiatives by offering pre-built automations and plug-and-play integrations. iBoT Store makes it easy for you to select, buy and reuse prebuilt smart automation from experts in the RPA, IPA and API development. Complex business processes can be automated in days. Select iBoTs for the processes you want to automate, configure them for your environment, and integrate them into your business process.

