

# Process Automation Solution for Salesforce



## Introduction

Businesses & organizations are increasingly looking to reduce costs by employing a smaller and productive workforce. They are constantly in search of automation solutions to help improve efficiencies & up their productivity stakes. Most of these organizations see automation as a more efficient and effective way to digital transformation.



### Customer background

- ▶ The customer provides emerging enterprise technology services and solutions to government agencies, and commercial businesses in the US. Customer business has been named as one of the fastest growing private companies in USA.
- ▶ End clients are both from public and private sectors to whom they provide services related to AI & DL, Big Data, Cloud, Networking, and Enterprise Security.



### Requirement

- ▶ The customer needed to improve productivity by implementing a cost-effective & reliable automation solution.
- ▶ Prime requirement was a process automation solution to web-scrap RFP/RFQ data from GSA website which is used by US government agencies for strategic sourcing of commercial products and services.
- ▶ This scraped data was needed to be uploaded into related objects in Salesforce CRM.



### Scope

- ▶ Automate web scraping and downloading of all RFP/RFQs from GSA website.
- ▶ Address multifactored authentication & login requirements of GSA site.
- ▶ To download all structured and unstructured data related to the RFQs & RFPs.
- ▶ Upload relevant & incremental information into Salesforce objects.



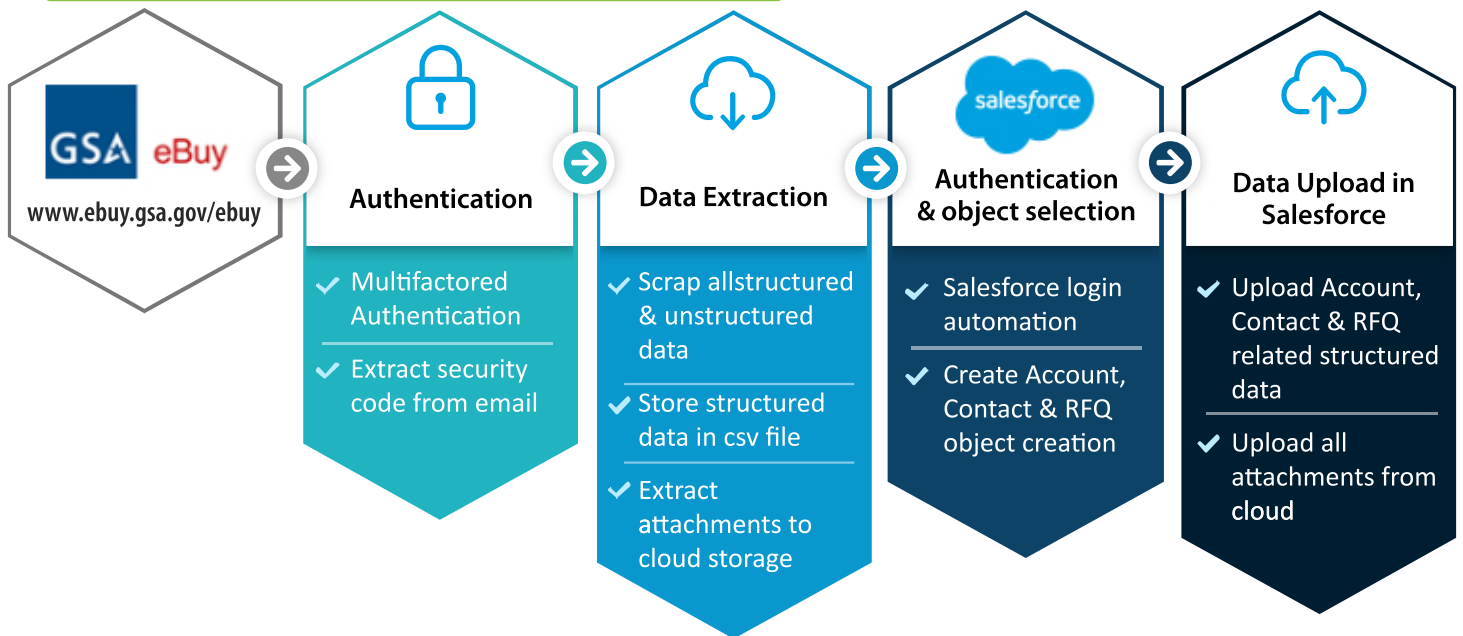
## Solution

Aress software built an automation solution that could perform the following:

- ▶ Web scrap GSA website for latest RFQs & RFPs.
- ▶ Download all structured and unstructured data related to these RFQs/ RFPs.
- ▶ Mapping of the Salesforce account names and account names from GSA.
- ▶ Create account, contact records and upload data into these Salesforce objects.
- ▶ Create RFQ records using account ID & contact ID, upload corresponding data.
- ▶ Upload all attachments (doc, ppt, pdf, xls files) onto Salesforce.
- ▶ Extensive testing to ensure 100% data accuracy.
- ▶ Deployment of the solution on Sales Cloud.



## Process Automation Overview



## Business Benefits

- ▶ **Productivity Improvements:** Automation solution drastically reduced the time needed to complete the process. What used to take hours is now getting completed in minutes and the solution has also improved data quality owing to elimination of errors.
- ▶ **Reliable and Scalable Solution:** The solution has been tested for 100% data accuracy and plan is to scale it up to include advanced analytics and artificial intelligence for obtaining better data insights.
- ▶ **Cost Effective Solution:** The solution was a cost-effective mechanism to kick start automation in the organization as compared to a costly product focused implementation.
- ▶ **Automation First Approach:** This is the first automation project for the customer and it is helping them kick start 'Automation First' approach/ thinking and its implementation within the organization.

## Contact Us

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