

SAPPER.

Integrate Salesforce
using Intelligent
Automation -



Salesforce Automation eBook

CRM or Customer relationship management tool has become an important part of any enterprise. All the strategies, tools and techniques related to customer acquisition are instilled in the CRM tool. In the digital world, CRM's have become an inevitable part of the organization.

It ensures that every step of interaction between you and the customers is run smooth. The application gathers all the customer information like name, email address, purchase history, the purchase amount, from multiple channels.

Among all the CRM's, Salesforce is widely used across the world. Currently, it is the most reliable CRM application out there.

Salesforce alone has its own limitations when a human operates it.

But when it's integrated using intelligent automation, the limitations are eliminated.

Let's understand how intelligent automation can help you do that

What is Salesforce?

Salesforce is world's number one CRM platform.

It helps your marketing, sales, commerce, business and IT teams to work anywhere with one single platform.

Salesforce CRM helps businesses connect with customers, prospects and give a good user experience. Companies use Salesforce to connect, nurture and grow their customer base.

In short, Salesforce is one-stop solution to all your CRM needs.



Benefits of using Salesforce



Store customer information



Team Collaboration



Accesibility



Account planning



Effective time management

How Intelligent Automation can Help?

Salesforce can be used efficiently if integrated with different applications. Meaning that your CRM softwares could be integrated with HR systems, communication systems etc.

With intelligent automation, you can upload files, sync data, collaborate data within Salesforce and other apps.

Sapper's Pre-built Automations for Salesforce

Salesforce and Marketo

- A new lead is created in Marketo
- Sapper bot will search for the same information in Marketo by email address
- If no matching leads are found, Sapper creates a lead in Marketo

Salesforce and Netsuite

- A new account is created or updated in Salesforce
- Sapper searches for customer information by name
- If the information is unavailable, Sapper bots create a new customer
- If the information is available, Sapper bots update the new information

Salesforce and ServiceNow

- A new case is created in Salesforce
- Sapper searches for the new case in ServiceNow by Salesforce description
- Sapper searches for the new user in ServiceNow by email id
- If no matching incident is found in ServiceNow, Sapper creates the new incident
- If no matching user is found, Sapper creates a new user ID.

Salesforce Integration FAQ's

1) Why Integrate Salesforce to other Systems?

- Eliminate manual process and prevent data silos
- Integration technology also provides realtime information to the users
- Inaccurate data can lead to business losses

2) Some Popular Salesforce Use Cases

- Salesforce and ERP (Netsuite, Oracle, SAP)
- Salesforce and MArketing Automation (Hubspot, Marketo, Mailchimp)
- Salesforce – Support and Logistics integration (Jira, FedEx)
- Salesforce and HCM (Workday, Taleo)
- Salesforce and eCommerce (Shopify, magento, Amazon)
- Salesforce and Communication (Slack, SMS)



Why Choose Sapper?

- ✓ • Ready to Use Automations
- ✓ • Fast Pace with Intelligent Automation
- ✓ • Eliminate Technical Glitches
- ✓ • Build Bots to Work for You

Want to Know More About Sapper Automation?

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