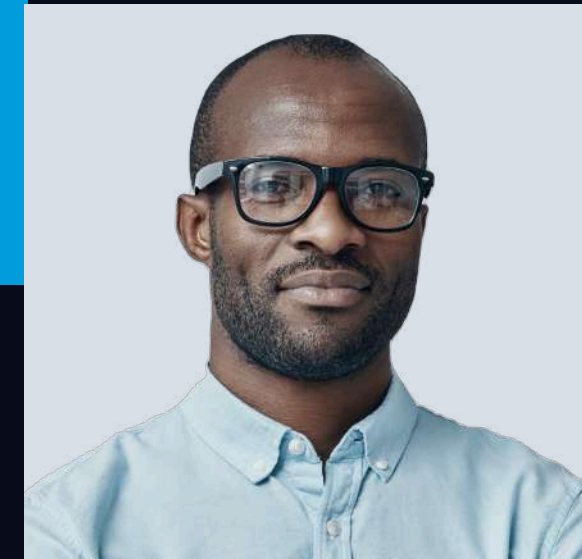




Speed up Salesforce document workflows by 40% with no-code automation

40% of workers spend at least a quarter of their workweek completing routine tasks. Emails, data collection, and data entry end up occupying most of their time. True, manual processes take up a lot of time and energy, preventing employees from focusing on customer service improvements.

Working in CRM systems, like Salesforce, generally simplifies the life and work of employees. However, it may also involve manual workflows that intimidate internal users. Creating complex contracts or forms and routing documents tends to be a time-consuming hassle leading to human errors.

This is where automation enters as a game-changer. 60% of workers estimate they could save six or more hours a week if the routine aspects of their jobs were automated.

Document workflow automation increases accountability and transparency by reducing the number of repetitive tasks that require manual actions. Better still, automation helps significantly reduce overall costs if you consider the 1-10-100 data entry rule.

- verification of data accuracy costs **\$1**
- cleaning up errors costs **\$10**
- uncorrected errors cost companies an additional **\$100**

1\$

**verification of
data accuracy**

10\$

**cleaning up
errors**

100\$

**uncorrected
errors**

Automate every one of your Salesforce document workflows with a single platform to avoid costly errors, diminished productivity, and time wasted on repetitive tasks.



Michael Moore
Insurance Advisor,
Transition Insurance Agency

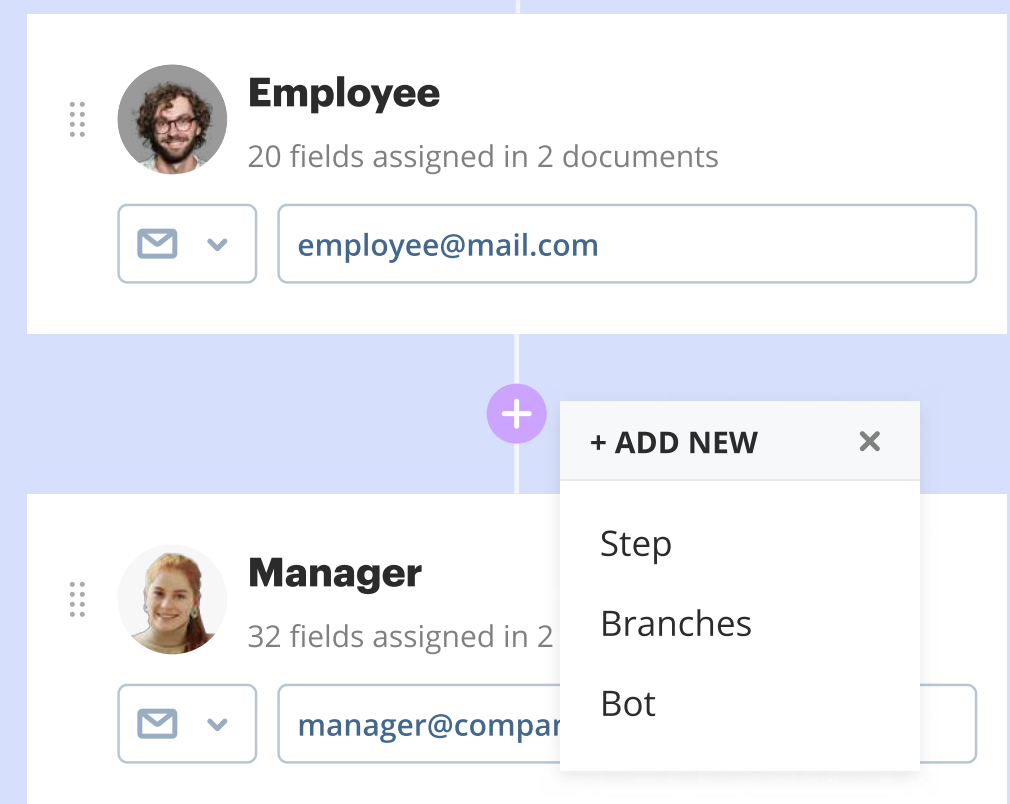


altaFlow has been a great addition to our business! It integrates well with Salesforce allowing our team to seamlessly get custom documents ready for signatures within our Salesforce record! The automation that follows is top-notch, making it so that our team is not wasting time and resources uploading and saving documents after they are completed.

Why is automation the key?

Automation has become a crucial driver for new levels of efficiency and profitability, with organizations across every industry integrating it into their everyday business processes.

Businesses note that significant shifts in their processes are achieved with the help of no-code bots that automate a wide range of tasks, from document routing to integration with third-party services.



Benefits of altaFlow's pricing model



Reducing operating costs

With automation, businesses not only save on the costs associated with human interaction and hiring additional staff, but also reduce interest expenses on delayed payments.



Return on human capital

Employees focus on more complex and high-value tasks. For example, instead of manually approving purchases, Sales teams can work on negotiating better vendor pricing.



Higher speed and velocity

With automation, businesses not only save on the costs associated with human interaction and hiring additional staff, but also reduce interest expenses on delayed payments.



Improved quality

Automated workflows demonstrate higher transaction accuracy, greater controls, and improved efficiency, while detailed analytics highlights opportunities for improvements.



Menachem Tauber

Technology Development Manager,
Lubavitch Educational Center

Can't stop thinking of ways where I can use altaFlow to automate. I love the fact that you can connect integrations so seamlessly with the bots. Automations that took me over 100 hours using Google sheets and scripts, can now be set up in altaFlow in just 20-30 hours.



altaFlow document automation for Salesforce

altaFlow empowers teams of all sizes to automate their daily Salesforce document processes in a consistent, repeatable way.

Challenges

- Creating complex contracts, order forms, and other documents takes time
- Routing documents is a time-consuming hassle
- Manually updating customer data is a process that is prone to error
- Handling documents with missing information is frustrating

What altaFlow offers

- Automatically generate documents using any data you have in Salesforce
- Process documents in your workflow based on the conditions you set
- Update existing or create new records for each new piece of data received
- Add fillable fields and assign roles for each recipient

Outcome

- Streamlined creation of customized documents and document packages
- Faster document processing
- Improved data quality and accuracy
- Increased customer and employee satisfaction

Improve productivity by leveraging cutting-edge, no-code automation

40%

Reclaim up to 40% of the hours spent on completing tasks manually

3h

Unlock up to 3 hours of a workday and put it towards driving business growth

10x

Implement fully-automated NetSuite document workflows up to 10X faster

Generate documents, automate their routing, and collect approvals — all without leaving Salesforce



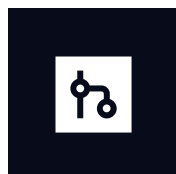
Automate document generation without coding

Save your reps' time on data entry and eliminate human error by automatically generating proposals, order forms, contracts, invoices, and more with Salesforce data.



Streamline document routing

Speed up approvals for discounts, expense reports, and more by automatically routing documents to be eSigned and completed by internal or external recipients.



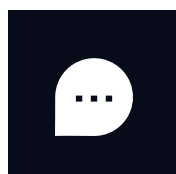
Create and update Salesforce records automatically

Use no-code altaFlow bots to update and create Salesforce records in minutes. Trigger Salesforce actions or events in cloud apps based on actionable data in documents.



Generate and share document packages in clicks

Avoid delays in your business processes by automatically generating batches of documents and sharing them with a single click or on set a schedule.



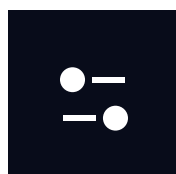
Notify customers and teammates

Keep everyone in the loop by sending out emails once a document has been changed. Track every change made in a Salesforce document workflow using the detailed Audit Trail.



Keep your Salesforce records secure

Prevent data loss by automatically saving finalized agreements directly from Salesforce to your device or cloud storage. Add conditions and tell the Bot when to export the file.



Trigger Salesforce actions based on actionable data in documents

Change the status of Salesforce records, update data in the linked records, or trigger events in external systems based on the data added to your documents.



Synchronize Salesforce data with other systems

Connect your NetSuite, Microsoft Dynamics 365, Google Drive, or other systems to keep information up-to-date with altaFlow Bots.



Sam Ginzberg
Chief Information Officer,
Royal Care



There is no need for dual entry; altaFlow eliminated the risk of errors. All paperwork and signature gathering has become a breeze. There is no longer a need to print, mail, retype, etc.

altaFlow for Salesforce:

Customer Success

altaFlow users have already experienced the benefits of Salesforce integration with automated routine business processes that freed up as much as 50% of their time for higher-value work.



Rocket Lawyer is a rapidly growing tech company that provides qualified and affordable legal services to individuals and SMBs.

Over the past 12 years, the company has helped more than 20 million people resolve legal issues and build stronger businesses.

Rocket Lawyer uses WorkFlow to speed up their internal workflows and HR processes. With the help of WorkFlow’s built-in document generation, the company creates and manages online contracts and gets signatures in minutes. No-code Bots help transfer the collected information to spreadsheets, CRM records, and other data sources.

Now the company can create actionable documents pre-filled with Salesforce data and eliminate repetitive tasks that used to take hours or even days to complete.



T2 Biosystems is an emerging leader in the field of in-vitro diagnostics. T2 Biosystems is currently targeting a range of critically underserved health conditions, initially focusing on those for which a rapid diagnosis could serve two critical functions – saving lives and reducing costs.

Before WorkFlow, T2 had been using MS Word and Adobe Acrobat to process forms and sensitive information and had difficulties in creating a consistent experience for end-users.

By integrating WorkFlow into their Salesforce processes, T2 Biosystems are able to easily share forms with end-users and secure partially completed information for future use. With altaFlow’s flexible no-code automation, T2 was able to adapt WorkFlow to their existing process on day one.

The flexibility of altaFlow allowed us to design a process that works for us. The automation built into WorkFlow helped us remove many manual steps in our old process.

Anthony Matero
Operations at T2 Biosystems



Conclusion

Integrate altaFlow automation inside Salesforce to delight customers, increase employee satisfaction, reduce expenses, and generate revenue.



Better together:

Salesforce + altaFlow

- ✓ Actionable documents pre-filled with NetSuite data
- ✓ Accurate and consistent NetSuite data
- ✓ Seamless document distribution directly from a NetSuite account
- ✓ Increased productivity with automated data-triggered events
- ✓ Automated record updates in NetSuite

Try altaFlow for Salesforce to create and automate document workflows for your company with a single no-code solution.

Get in touch with sales to find out how altaFlow
for Salesforce can help your business.



Update Salesforce Records ×

Connect to Salesforce account



GBN Inc.

Object

New empl... ▼

=

Document

Employee... ▼

Name ▼

T Name ▼