



salesforce partner



4.9 | 14 reviews



4.9 | 8 reviews



Automate Routine, Focus on Smart

Certifications

60+

Projects

56+

Customers

30+



We Deliver **Trust, Security**
& **Transparency** to our
customers **across the globe**

Industries



Retail & Consumer Goods



Manufacturing



Energy & Utilities



High-tech



Media

art of
Cloud

coacto

DR SMILE

ignyto

instamotion

juston

**mind
square**

PolSource

Roger.
Customer Experience Studio

TONDRO
CONSULTING

Trigerz

valuent

ZIZOO

FINN-KORKKI

**My
Speaker**

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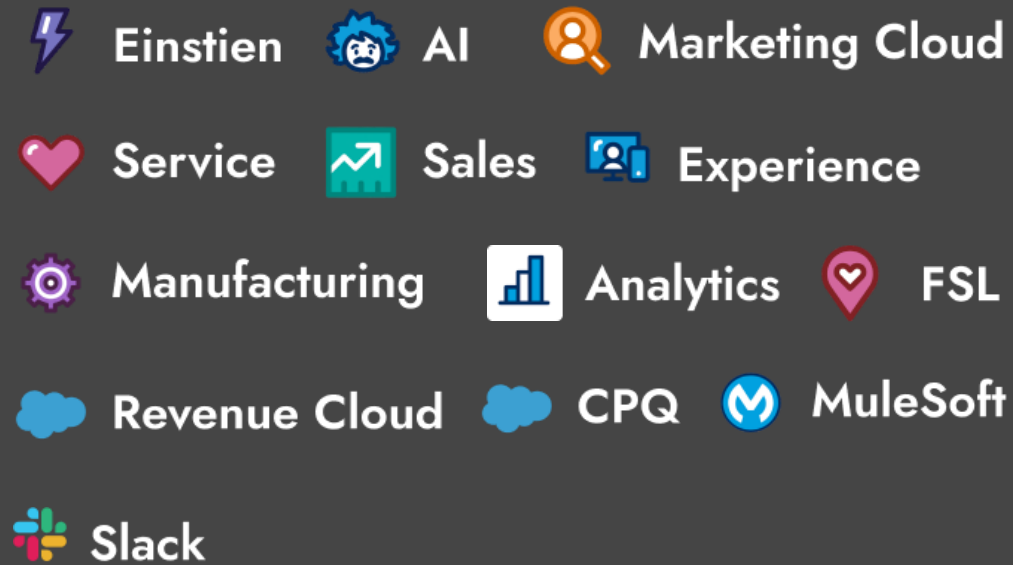
e-on
Drive

PEM PennEngineering®

NEOVA

PROFIL
a PennEngineering Company

Our most experienced field of expertise



Our Technology Stack to build trust



How we DO IT

Discovery

Onboarding = Assessment

Implementation

Throttle or Kickoff



Professionals from various fields come together at Routine Automation

Our expertise covers planning, design, development, testing, integration, modernization, and ongoing maintenance and support to address any skill gaps.

Salesforce Architect

Salesforce Engineer (Dev/Admin)

Salesforce Consultant

Project Manager

Salesforce Functional Consultant

Frontend Developer

Software Developer

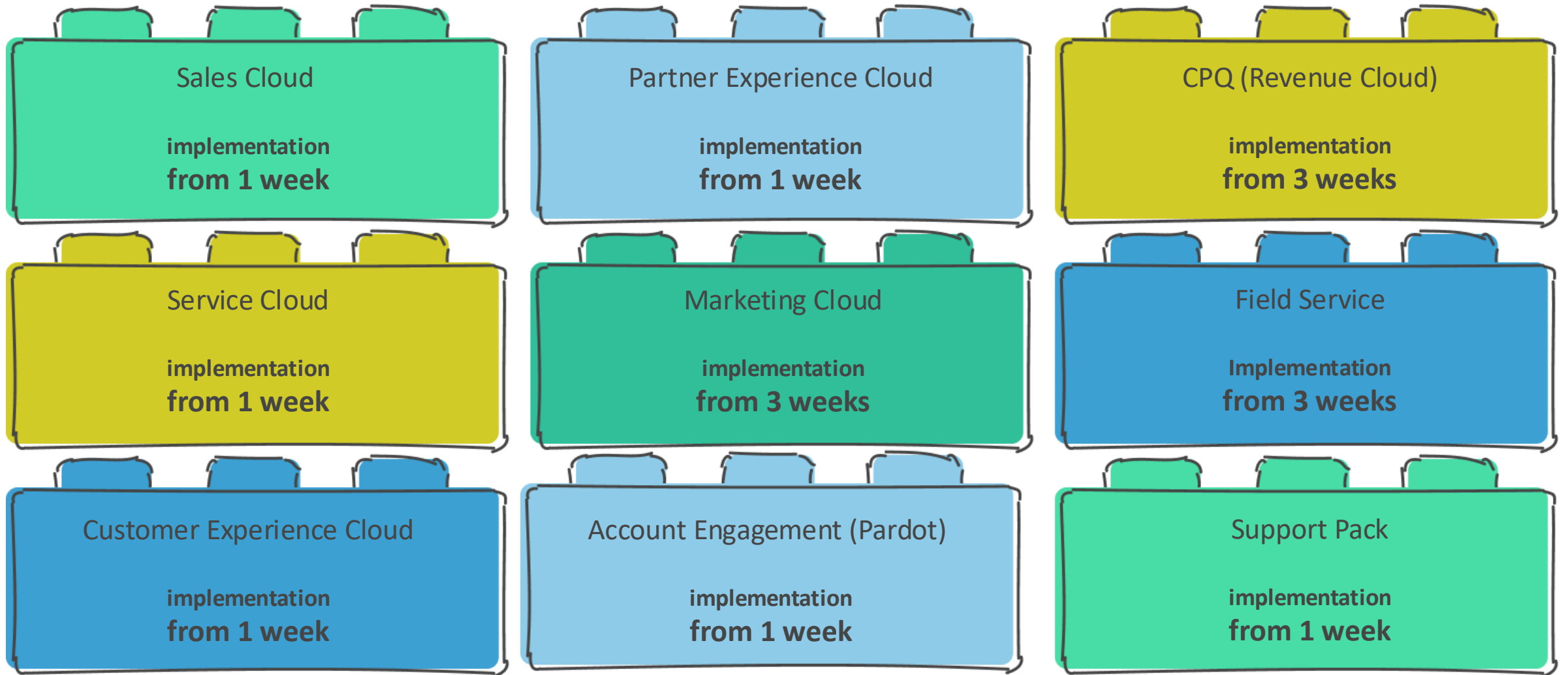
Technical Architect

We train our customer's staff on how to get max out of Salesforce



Starter Packs - Frame Set

Salesforce project development made easy with Starter Packs



Proven expertise over time



Routine Automation's work exceeded the client's expectations, and the solutions they delivered were truly useful for the client. The team's great skills and expertise were remarkable, and they managed the engagement effectively. Moreover, they were responsive and completed every task on time.

"Their development solutions were fantastic."



Routine Automation has adequately delivered the project to the client's expectations. The vendor ensures effective communication, daily calling and updating the client. The service provider's helpful attitude, responsiveness, and enthusiasm are hallmarks of their work.

"They were super helpful and responsive to requests and always keen to help and assist."



Thanks to Routine Automation's work, the client's ROI is great — they've saved the team more than \$112,000 this year. Their excellent communication and adaptability to the client's processes have been key to the project's success. The client also praises their knowledgeable and skilled salesforce engineers.

They should keep doing what they're doing."



Routine Automation has been working with us about a year now. Projects they have been doing are development of three Experience Cloud sites for our customers and small development on Sales and Service cloud.

Fast and flexible with good quality"



Service Management Implementation

Client

A pioneer in mechanically attached fastener technology for the automotive industry

What's done

- > Implemented customized FSL solution for the European division
- > Enabled drag-and-drop technician reassignment on Service Appointment Gantt
- > Integrated with SAP for product transfers, notifications, and data exchange
- > Isolated implementation to avoid impacting global operations

Challenge

- > Needed to automate service reporting and data entry processes for the European division
- > Required efficient timesheet generation without geolocation tracking while enabling activity synchronization
- > Wanted to optimize technician workload management with drag-and-drop reassignment and seamless SAP integration

Results

- > Enhanced operational efficiency with independent divisional implementation
- > Facilitated technician management with scheduling and SAP integration
- > Improved Salesforce-SAP data synchronization and workflow
- > Increased client satisfaction with automated processes



Salesforce Implementation for Green Company

Client from 2022

An international company focused on renewable energy and environmental solutions, including clean food, air, and water.

What's done

- > Implemented Salesforce Lightning for centralized data management
- > Built customized portal with self-registration and order management
- > Enabled mobile ordering for customers
- > Integrated portal orders with back-end ERP via Azure
- > Automated product data updates and multi-portal user access

Challenge

- > They had lacked mobility and self-service options for customers
- > Existing systems limited ability to track sales and manage customer data efficiently
- > They needed to consolidate multiple portals for different communities into a unified platform

Results

- > Customer conversion rate increased
- > Improved customer satisfaction by flexibility
- > Reduced product data processing time
- > Mobile orders increased, streamlined processing



Optimizing Operations with Salesforce

Client from 2022

One of Europe's largest energy networks and infrastructure operators.

What's done

- > Implemented Sales Flow leveraging standard Salesforce data models.
- > Introduced Recurring Orders flow for automatic creation based on subscription product terms.
- > Implemented Approvals and Document eSign Automation for quote approval via email.

Challenge

To meet surging demand for monitoring energy grid operations, our team swiftly implemented a Salesforce project - integrating advanced invoicing to streamline quoting to invoicing.

Results

- > Streamlined quote-to-invoice
- > Enhanced sales flow with automation
- > Improved efficiency with recurring orders
- > Seamless approvals and eSign processes

