



# Step's Roboagile Methodologies Accelerates Salesforce Cases Cancellation For A Leading Energy Domain

## ABOUT CLIENT:

Driving the transformation of the energy sector around the world, allowing our customers to use technology to transform energy into new opportunities for growth and progress.

## REVENUE:

\$1,130 mil

## EMPLOYEES:

2,768

## INDUSTRY:

Utilities and Energy

## REGION:

Europe

## BUSINESS NEED:

To develop automated solution, which can cancel 2000-2500 cases/day in Salesforce application which are regarding different services like as gas, electrical.

# BUSINESS BENEFITS

## 01

### Clearing backlog of 16,000 cases cancellation in Salesforce ASAP

Company needs to clear the backlog of 16,000 cases to cancel in Salesforce application ASAP.

## 02

### After clearing backlog needs to manage 2000-2500 cases/day to manage the SLA

15-20 FTE daily doing case cancellation from Monday-Friday which is not sufficient to manage 2000 cases/day so needs robot which can run 24\*7 and day to day basis process case cancellations so SLA can get achieved.

## 03

### Mundane Work & Human dependency:

15-20 Resources processing case cancellations request on a daily basis so their dependency will get released through 8 Robots.

## 04

### Accuracy & Relevance:

To eliminate manual intervention, which gave rise to issues related to accuracy and relevance as well as required multiple verification rounds for confirming authenticity and accuracy.

# STEP Robotics' SOLUTION

STEP deployed its Robotic Process Automation (RPA) solution, using UiPath Tool, for managing 2000-2500 cases/day.

## Some of the key highlights of the implementation are:

- 8 Robots are running 24\*7 and bots get triggered by the orchestrator. We set the orchestrator scheduler at 1hr for all bots. At each 1 hour, bots get triggered to process the cases if they have.
- Reading the Cases data from email, removing duplicate cases, and processing in Queue.
- The bot will pick Transaction ID from Queue and process-related case id in Cancellation Process Workflow. If the Transaction is a success then the Transaction Status is updated as Successful else Transaction Status is updated as failed along with the exception details.
- At each 1 hr bot get new mail for the first 3 hrs. After that bot will receive mails at a difference of 2hrs till 11:00 pm (Spanish time).
- The client wants at 5:00 am (Spanish time) all bots to stop automatically and send output reports to Business users.

# TECHNOLOGIES

- RTA Tool/Platform: UiPath
- RTA execution infrastructure setup
- Web software setup/integration
- RPA processor configuration
- RTA Execution Orchestration configuration
- Software Bots configuration
- RPA Logs/Analytics
- Version Control integration

# BUSINESS IMPACT



## SCALABILITY

Can handle dynamic workload with increase or decrease in Bot



## EFFICIENCY

3x Efficient than Humans



## ACCURACY

98% Accurate Process



## RELIABILITY

100% Reliable Process



## SAVING

€ 287,664 Annual Savings

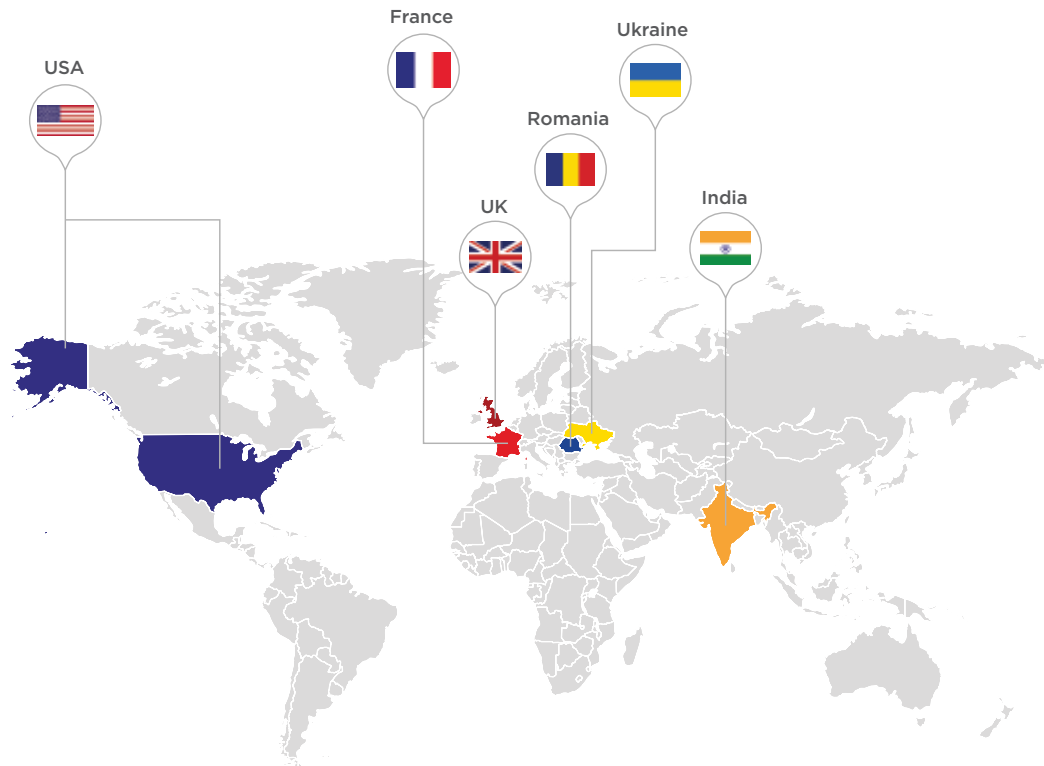
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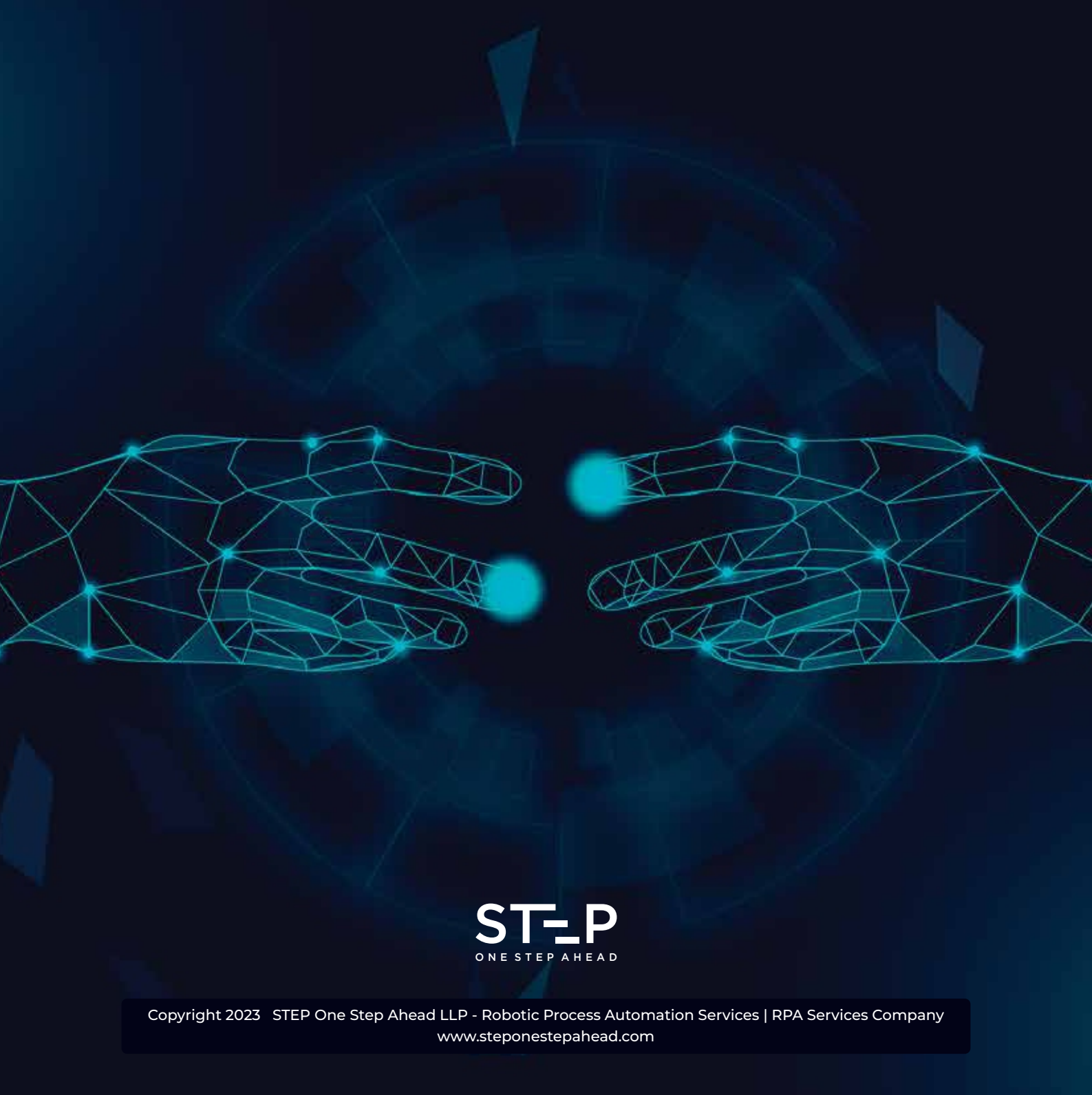
## STEP one step ahead

STEP one step ahead provides intelligent solutions for data-driven businesses to increase productivity and enhance the customer experience. With a complete digital approach, STEP one step ahead's portfolio spans Information Technology Services, Business Process Management, Engineering Services and Analytics, all powered by Artificial Intelligence. It has established products in Robotic Process Automation, Intelligent Document Processing,

and Business Intelligence. STEP one step ahead is providing services to global customers across Banking, Financial Services, Insurance, Healthcare, Manufacturing, and International Organizations. The Company has a presence across 3 continents with major delivery centres in the USA, India, and UK.

To know more about STEP, visit [www.steponestepahead.com](http://www.steponestepahead.com)





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