



REVENUE

Salesforce has tools. Revenue workflows need orchestration.

Ortoo Orchestrator coordinates leads, agents, routing, and handoffs in one governed workflow, natively in Salesforce

You already have plenty of automation tools in Salesforce: flows, routing rules, assignment logic, AI tools.

Your team is still doing work they shouldn't have to do.

- Leads sit unassigned
- They go to the wrong rep
- They get picked up too late or not at all
- Your team fixes routing and reassigns work

As things get more complex, you add more automation and AI. It doesn't fix it. It makes it harder to control. Routing breaks. Leads get missed. Fixing becomes part of the process. Salesforce has automation and AI. **What's missing is structured orchestration of work.**



LEADS SIT UNASSIGNED



ROUTING BREAKS



MISASSIGNMENTS HAPPEN



MANUAL REASSIGNMENT IS THE FALLBACK



FOLLOW-UP IS DELAYED



NO CLEAR VIEW OF WHAT'S HAPPENING

Define how revenue work runs — and let agents execute it

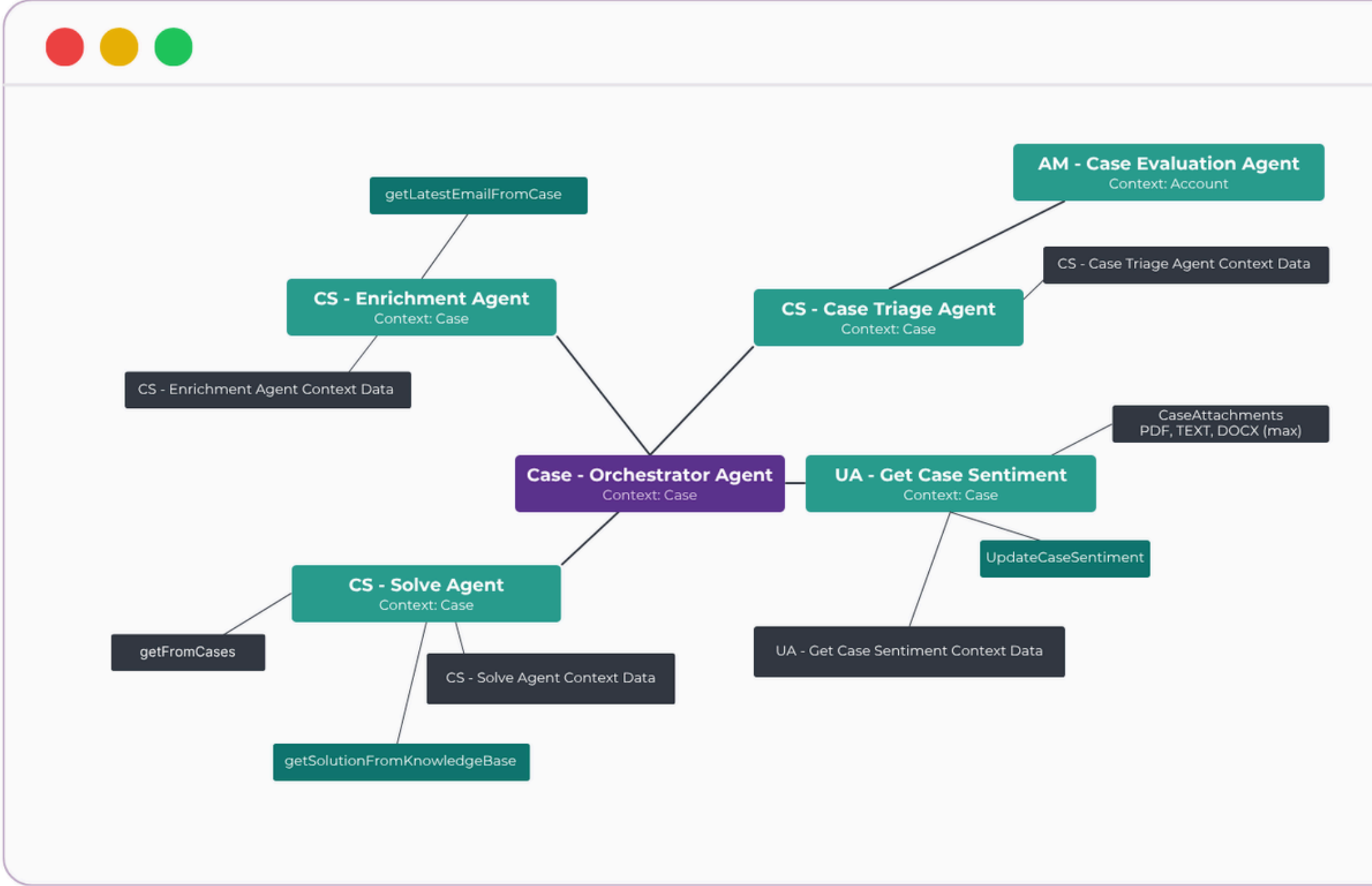
Ortoo Orchestrator helps you define how your revenue workflow should run, then ensures they execute correctly without manual intervention.

Instead of relying on disconnected rules and manual fixes, you workflows run as one coordinated system.

Work is executed automatically based on how you've defined it through manual triage, reassignment, or constant adjustment.

AI is applied where understanding is needed, while decisions follow clear logic. This keeps execution predictable.

Salesforce gives you automation, routing, and AI. Ortoo Orchestrator adds the layer that controls how work executes across them.

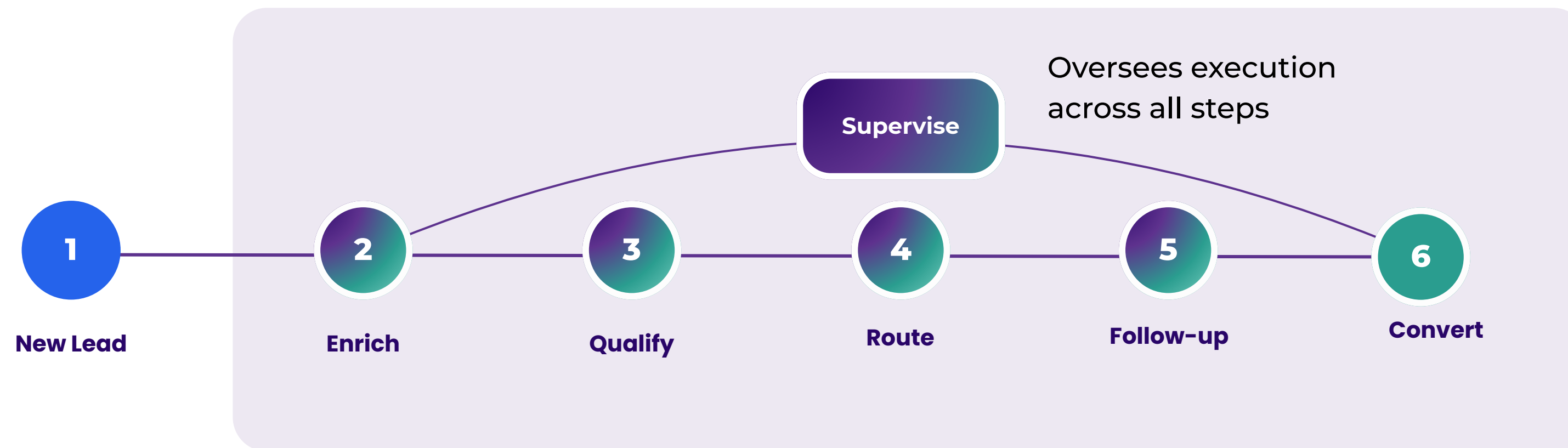


How a lead is handled in Salesforce

Every lead follows a defined path: **Trigger** → **Steps** → **Outcome**

A lead enters Salesforce. Agents determine what needs to happen, execute each step in sequence, and move the lead forward. Each step is handled by a specific agent with a defined role, not one general AI deciding everything.

No chasing. No fixing routing. No manual reassignment.
Agents handle it, coordinated through a defined orchestration layer.



Each step is handled by agents — with or without AI — as you defined it

LEADS

Assignment, prioritization, follow-up

INBOUND SIGNALS

Forms, signups, intent data

REQUESTS

Demo requests, partner flows

ACCOUNTS

Ownership changes, enrichment

DOCUMENTS

Data extraction and processing

EXTERNAL SYSTEMS

Data pulls from APIs, data lakes, enrichment tools

How revenue operations are executed and controlled

You define how work moves and how AI is used at each step. Agents follow your rules, so execution stays consistent and predictable.

Routing follows clear logic

Leads are assigned based on defined rules, not manual fixes

Each step has a clear owner

Every step is handled by a specific agent with a defined role

AI is used where it helps

Inbound signals are understood automatically, while decisions remain predictable

You can change it without IT

Operations teams can update workflows as things change

How workflows are handled in practice

Capacity-aware assignment

Agents distribute leads based on availability and workload, keeping follow-up fast and balanced

Priority-driven handling

Leads are ranked and routed based on signals, ensuring high-value opportunities are handled first

Context-aware routing

Each lead is assigned by an agent based on territory, ownership, and business rules

When work runs through agents in defined steps:

- Routing works consistently
- Leads don't get stuck or go missing
- Follow-up happens on time
- Every step is visible and traceable

Execution is tied to work completed, giving you a predictable cost model without relying on variable AI usage.

What improves day to day:

Routing works the first time

Leads reach the right rep without reassignment

Follow-up happens faster

Agents adjust based on defined logic as conditions change

Queues don't build up

Leads move forward instead of waiting



Agent-based execution

Each step is handled by a specialized agent with a defined role

Salesforce-native orchestration

Runs directly inside Salesforce with access to your data and automation

External system interaction

Agents can call APIs and business systems to retrieve and update data

Predictable cost model

Execution is tied to work completed, not token usage

Full audit trail

Every step is logged and traceable end to end

Orchestrate workflows in Salesforce with full control over execution and AI usage

Build

Compose agents from reusable functions and tools

Combine data access, API actions, AI steps, and routing logic into structured, reusable agents

Design agent-to-agent workflows

Chain specialised agents together so each step is owned, defined, and executed in sequence

Bring your own AI models (per step)

Select the LLM provider and model for each function or agent, or run fully deterministic logic with no AI

Control inputs, outputs, and behaviour

Define what data is used, how it is processed, and what each step is allowed to do

Reusable workflow patterns and templates

Standardise common workflows and agent configurations for reuse across teams and processes

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Dynamic context and data retrieval

Inject relevant Salesforce and external data into each step at runtime based on context

Configure without code, within control boundaries

Operations teams build and update workflows safely, within defined constraints and reusable patterns

Execute

Predictable step-by-step execution

Each step runs in sequence as defined, ensuring consistent and repeatable outcomes

Hybrid execution (AI + deterministic)

AI handles interpretation, while decisions and actions remain governed by defined rules

Event-driven and on-demand execution

Trigger workflows from record changes, requests, or user actions

Integrated system actions

Agents retrieve and update data across Salesforce and external systems via APIs

Shared workflow memory

Maintain continuity across steps so agents operate with full context and awareness of prior actions

Supervised execution

Every step runs within defined rules, ensuring workflows do not drift or require manual fixes

Operate & Monitor

Full visibility for monitoring

See how work is handled across every step, agent, and system

Trace every action

Understand what happened and why through complete audit trails

Granular control over AI usage

Enable AI only where needed, choose the model per step, and control what data is sent externally

AI / LLM Model and policy control

Define which models are used for which tasks, enforcing consistency and governance

Predictable cost model

Tie cost to work completed, not variable token usage

Secure, Salesforce-native execution

All actions run within Salesforce permissions, roles, and data access controls

Continuous optimization

Update workflows, test changes, and improve performance without disrupting execution

Built for how your revenue team actually works



Teams dealing with growing lead volume and complex routing use Ortoo Orchestrator to remove manual work and improve conversion speed.

Your workflows involve multiple teams, signals, and constant change. Ortoo Orchestrator ensures each step is handled correctly, so leads don't get stuck or assigned to the wrong rep. It works inside Salesforce with your existing setup and gives you clear visibility into how every lead is handled.

Example: Cars.com

A global team handling high-volume customer and revenue operations used Ortoo Orchestrator to remove manual triage and routing fixes.

- Work is now classified and routed on arrival.
- Requests go to the right team the first time.
- Reassignments dropped significantly.
- First-touch routing is now near 100%.
- Response times improved within weeks.



14,000+ work items per month handled efficiently



Right assignments on first touch

Coordinate fragmented revenue tools with an orchestrator

Ortoo Orchestrator replaces fragmented tools with a Salesforce native orchestration layer that ensures each step is handled correctly by agents.

You don't need to fix routing, chase leads, or reassign work.

You can start with one workflow.

Expand step by step across operations on Salesforce.

See how this would work for your setup

Book a working session and let's map your current Salesforce workflows.

Let's talk?

Trusted by enterprises with complex Salesforce operations

