

ORTOO



SERVICE &
REVENUE

Salesforce has tools. Your operations need orchestration.

Ortoo Orchestrator handles service cases, revenue leads, and the workflows between them — in one governed layer, natively in Salesforce

You already have plenty of automation tools in Salesforce: flows, routing rules, queues, AI tools. But do you have control over how work executes across them?

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

- Cases sit in queues
- They go to the wrong team
- They come back when something breaks
- Your team fixes routing and reassigns work

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



CASES BOUNCE BETWEEN TEAMS



MANUAL REASSIGNMENT BECOMES THE FALLBACK



WORK SITS IN QUEUES



ROUTING BREAKS



EXCEPTIONS BECOME MANUAL WORK



NO CLEAR VIEW OF WHAT'S HAPPENING

Define how your workflows run — and let agents execute it

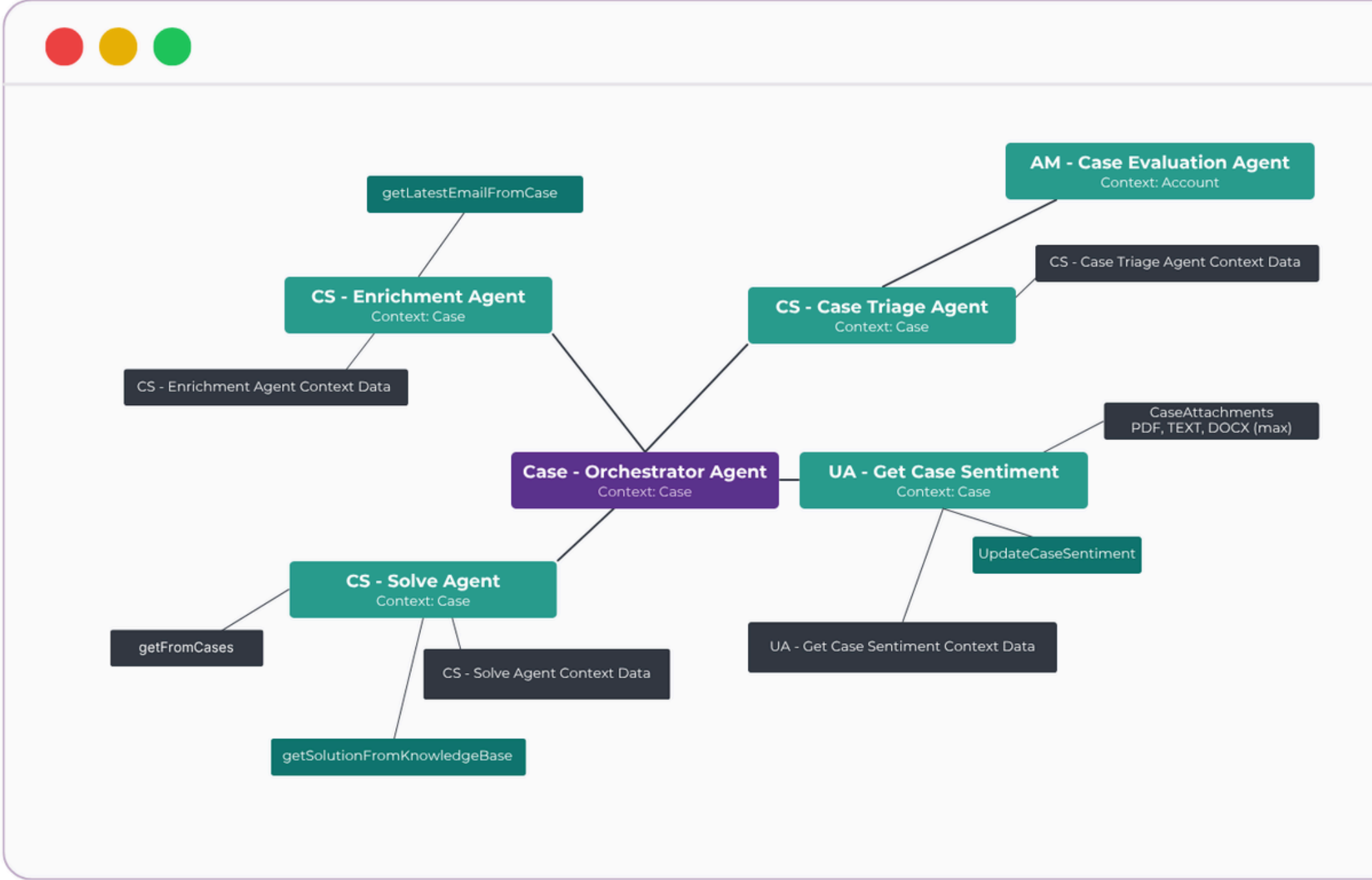
Ortoo Orchestrator lets you define how your operational work should run, then ensures it executes correctly without manual intervention.

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

Work is executed automatically, based on how you've defined it — not through manual triage, reassignment, or constant adjustment.

AI is used where understanding is needed, while decisions remain governed by clear logic. This keeps execution predictable and under your control.

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

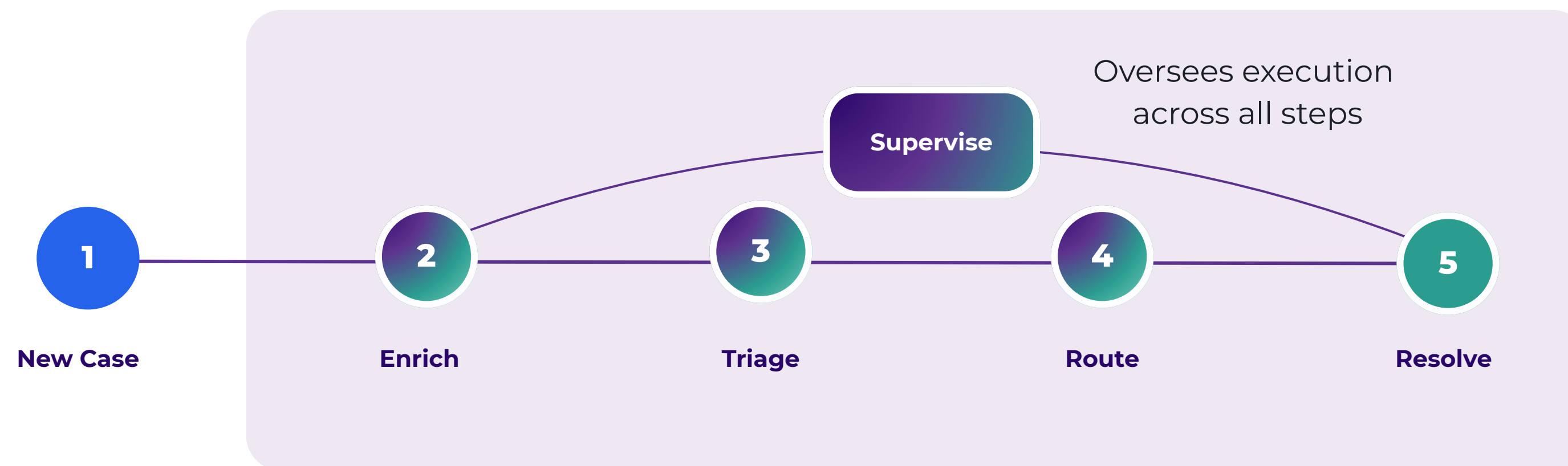


How a case is handled in Salesforce

Every case follows a defined path: Trigger → Steps → Outcome

A case enters Salesforce. Agents determine what needs to happen, execute each step in sequence, and move the case 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

CASES

Triage, routing, resolution

EMAIL

Inbound requests and unstructured inputs

LEADS

Assignment, prioritization, follow-up

REQUESTS

Internal and external workflows

DOCUMENTS

Extraction and processing

EXTERNAL SYSTEMS

Data pulls from APIs, data lakes, financial systems

How 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 rules

Cases are routed and handled based on defined logic, 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

Requests 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

Agent-driven routing

Each case is routed by an agent based on skills, context, and how your teams operate

Capacity-aware assignment

Agents distribute work based on availability and workload, keeping work moving without queues building up

Resolution-first handling

Agents guide requests toward the fastest path to resolution, including self-service or triggering the right actions when intervention is needed

When work is executed by specialized agents in defined steps:

- Routing works consistently
- Exceptions don't create manual work
- Work moves forward without manual intervention

Every step is visible and traceable, so you can see how cases were handled and why.

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

Cases reach the right team without reassignment

Exceptions don't create manual work

Agents adjust based on defined logic as conditions change

Queues stop building up

Cases 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 operations actually work

Teams dealing with growing volume, complexity, and cross-functional workflows use Ortoo Orchestrator to remove manual work and improve execution reliability.

Your workflows involve multiple teams, systems, and constant change. Ortoo Orchestrator ensures each step is handled correctly, so work doesn't get stuck, delayed, or assigned incorrectly. It works inside Salesforce with your existing setup and gives you clear visibility into how every workflow runs.

This applies across:

Service workflows — cases, support, requests

Revenue workflows — leads, assignment, pipeline

Custom workflows — onboarding, approvals, industry-specific processes

Example: Cars.com

A global support operation handling 14,000+ cases per month removed manual triage and routing fixes. Cases are classified and routed on arrival. Work goes to the right team the first time.

Reassignments dropped significantly.

First-touch routing is now near 100%.

Response times improved within weeks. Manual triage was eliminated.



14,000+ cases per month handled efficiently



Right teams assigned on first touch

Replace fragmented tools with a system that runs your Salesforce workflows

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

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

You can start with fixing one workflow. Expand step by step across service, revenue, and custom operations in Salesforce.

See how this would work for your setup

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

[Let's talk?](#)

Trusted by enterprises with complex Salesforce operations

