ORTOO

salesforce native

Ortoo Orchestrator for Service and Revenue Operations in Salesforce

Agentic workflow orchestration, built natively into Salesforce

Control complex, high-volume workflows end-to-end

Ortoo Orchestrator automates the operational work teams shouldn't have to do in Salesforce — such as case triage, lead routing, and request handling.

Instead of relying on disconnected flows, routing rules, and manual fixes, you define how work should be handled step by step. Each step is then carried out by a specialized agent with a clear role, so execution stays consistent and doesn't depend on people to keep it moving. Agents use AI — or don't — as you define.

Common use cases include:

Case lifecycle management (triage, routing, resolution)
Lead routing and assignment (enrich, qualify, route, follow-up)
Request and intake workflows (classification, processing, action)

It works directly inside Salesforce and uses your existing data, automation, and systems.

Key benefits

Control how work is handled

Define how work should run and ensure it follows that path

Specialist agents per task

Each step of the workflow has a clear owner, not one general tool

Salesforce-native setup

Uses your existing flows, routing, and data without adding complexity

Predictable cost model

Execution is tied to work completed, not token usage

No-code configuration

Operations teams can build agents and update workflows without IT

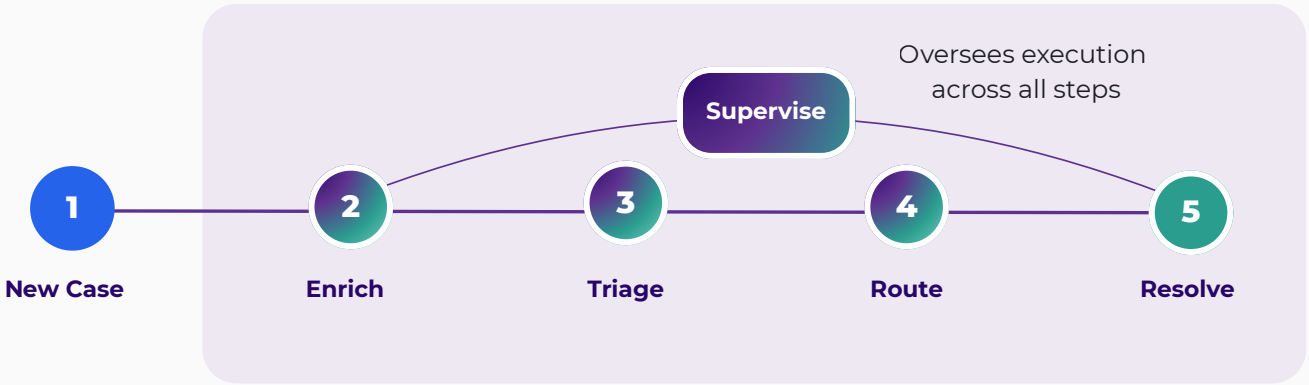
Flexible AI usage

Use AI where it actually helps, and choose the provider and model per step

Eliminate manual fixes

Workflows execute efficiently – teams do what they should

From intake to outcome without manual fixes



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

Trusted by enterprises with complex Salesforce operations

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Orchestrate workflows with full control over execution, AI usage and data

Built for how complex operations run on Salesforce

Salesforce-native

Runs directly inside Salesforce, using your data, flows, and automation — no external systems added

Works across systems

Agents connect to APIs, data platforms, and business systems to retrieve and update data

Controlled execution

Work is handled step by step by task specific agents, with full visibility into each step

Build

Compose agents from reusable functions and tools
Combine data access, API actions, AI steps, and routing logic into structured agents

Design agent-to-agent workflows
Chain specialised agents together to handle each step of the process

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, behaviour
Define what data is used, how it is used, and what each step is allowed

Configure without code, within control boundaries
Operations teams build and update workflows safely without IT

Execute

Predictable step-by-step execution
Each step is carried out in sequence as defined

Agent-to-agent coordination
Agents pass work, context, and outcomes between each other as part of a controlled process

Event-driven and on-demand
Trigger workflows from record changes, inbound requests, or user actions

Integrated system actions
Agents retrieve and update data across Salesforce and external systems via APIs

Supervised execution
Every step runs within defined rules, ensuring consistent outcomes regardless of volume or complexity

Operate & Monitor

Full visibility for monitoring
See how work is handled at every step

Trace every action
Understand what happened and why through audit trails

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

Predictable cost model
Tie cost to work completed, not variability

Secure, Salesforce-native execution
All actions run within Salesforce permissions, roles, and data access controls

See how this would work for your Salesforce workflows

Let's map one of your workflows, see how it runs today, and where it can be improved?

Book a session