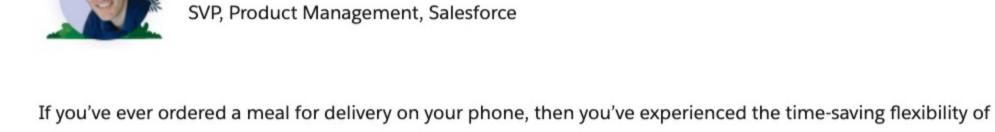
BROWSE BY CATEGORY +

What is Automation? A Glossary of **Automation Definitions** Get to know the essential vocabulary around workflow automation,

process automation, business automation, and hyperautomation. TIME TO READ: 6 MINUTES



RESOURCE CENTER



know how automation can save time and money for your business.

John Kucera

But first, what is automation? **Automation**

better experience for your customers and lower stress for your teams. It involves technology that takes a task

automation. And if you use Salesforce or other customer relationship management (CRM) software, you probably

Automation reduces the work that humans have to do on repetitive or monotonous tasks, which usually means a

people do and relegates it to software or hardware. Automation is a streamlined process that reduces or eliminates

autolaunched)

manual steps. There are two types of automation: unattended (actions without human intervention) and attended (actions executed by humans). Some automated tasks may combine the two. Example: In service, a sudden and large influx of support cases on a single product or event could trigger an automatic notification to IT. The IT response team could diagnose the problem and complete a guided workflow that documents the resolution via a form. That form could then be sent automatically for approval before closing the case.

Even if you don't plan to build automations yourself, you might run into some terms you're not familiar with. We put together this short glossary to help you understand the automation terms you'll run across most often, and how you can use them in every part of your business.

This refers to an action not triggered by human input and executed by a system or bot in the background automatically. The four types of autolaunched triggers include:

Background Process (also called background flow, unattended, or

✓ Invokable action, meaning a process that launches when called by code or other processes ✓ Schedule, which launches at a specified time and/or frequency Change, which launches when a record is created, updated, or deleted

Event, which kicks off when an action takes place

Example: An example of an autolaunched trigger is scheduling a newsletter to send every Monday at 8:00 a.m.

typical organization, this often requires collaboration workflows across sales, finance, and service.

- **Business Process Automation (BPA)**
- This is the overarching umbrella term for using technology to streamline business processes and functions. This

platforms (LCAP), artificial intelligence (AI), and virtual assistants (like chatbots). **Example:** Technology used to streamline a multistep, cross-organization process such as customer onboarding. For a

Business Process Management (BPM)

Read more about business process automation.

resources and coding.

Example: After a hard copy of a change of address is received and scanned, a person must look at the image and determine what action to take next. This then gets added to a BPM system to route it to the next step in the process.

to make a decision for them. AI decisioning uses algorithms learned from historical data or behavior. Rules-based decisioning is based on "if this, then that" instructions.

purchase an additional policy if they own a house. An example of rules-based decisioning is if a customer buys the red belt at your online boutique, the online store would then show the customer the red shoes to match.

Digital Process Automation (DPA)

Decision Assist (also called decisioning)

Automation that focuses on removing routine work involving written documents such as forms, records, or letters within a workflow.

This is a somewhat recent and increasingly popular term in automation, and one that's primarily used by industry analysts rather than businesses or organizations. It refers to the action of scaling business process automation initiatives by identifying, vetting, and automating as many processes as possible as quickly as possible.

Example: Robotic processing automation can be used to process loan applications and quickly trigger the loan

approval process. Read more about hyperautomation.

systems.

action upon completion.

Hyperautomation

Integration These are tools that connect business systems like applications, data, and devices, often through an application programming interface (API). Integration means reading, creating, updating, and/or initiating an action in a system,

such as sending an email or refunding a payment. The means of performing an integrated task can change depending on the type of the integration – batch jobs, syncs, events, APIs, and more.

Example: Connecting your customer portal to your internal system of record or CRM to update information in both

Similar to DPA, intelligent process automation includes AI functionality using technology like optical character

recognition (OCR) and named entity recognition (NER). Example: Using a picture of a driver's license and automatically extracting the data into an electronic form which can

Learn more about connecting apps and data to your CRM with clicks, not code.

Marketing Automation

Read more about marketing automation.

then kick off an automated action.

Intelligent Process Automation

It is typically used for outbound customer marketing activities and takes customers through the buyer journey to build long-term engagement. **Example:** Email marketing automation can automatically trigger an email to follow up on abandoned shopping carts

or to personalize messaging for a customer's birthday, to increase the likelihood of engagement.

provisioning workflow, and training workflow into one streamlined process.

Orchestration The act of coordinating and streamlining a business process with one or more workflows using automation.

Process A business process comprised of one or more workflows or fully automated processes. **Example:** The employee onboarding process.

Robotic Process Automation (RPA)

An application or bot usually running on a virtual or on-premises machine that can perform repetitive tasks like entering text and updating fields with prerecorded actions. It often gets used alongside OCR technology.

Example: Extracting vendor contact information from a large volume of invoices quickly.

The technology that removes or minimizes many of the manual, tedious tasks associated with the sales process. **Example:** This could include creating automatic email alerts for deals over a certain size, auto-assigning tasks as a deal moves through its stages and automating approvals.

Learn more about sales automation.

Read more about service automation.

the customer's issue.

Task

Trigger

hours of inactivity.

Learn more about RPA.

Sales Automation

Service Automation The technology that helps streamline customer service and support to improve efficiency and the customer experience.

A single step or group of steps within a process that needs to be accomplished. **Example:** Any singular action taken, such as filling out a form.

A people-centric process involving multiple tasks completed over a period. As a result, workflows often involve

Example: A new hire workflow may involve filling out new hire paperwork such as government documents, direct

Workflow

deposit forms, and benefit forms.

dependencies, delays, and the potential for human error.

make decisions and build customer relationships.

Workflow Automation The process of optimizing or automating tedious, manual tasks within a larger workflow. Workflow automation helps

every system of record related to it reducing the need for duplicate data entry.

Any action or event based on user or machine input that starts an automation task.

Learn more about workflow automation and how it works with CRM. Why invest in automation?

Our research also found that 95% of IT leaders are prioritizing process automation. Automation for IT workflows

report strong ROI. Nearly 75% see time savings equivalent to at least four hours per a 40-hour week.

often includes automated incidence responses, purchase order tracking, or asset management.

John Kucera leads the Automation Services product team, directly responsible for Einstein Chatbots, Flow, and Einstein Next Best Action. He is also responsible for driving the Einstein Automate vision across the Platform, Mulesoft, and Salesforce Industries, enabling end-to-end automation, integrated across any system.

SVP, Product Management, Salesforce

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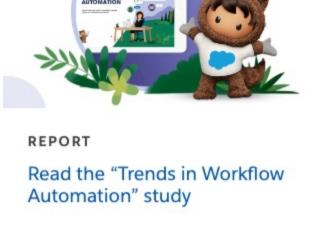
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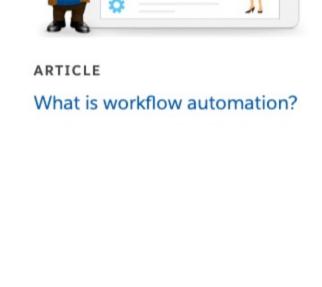
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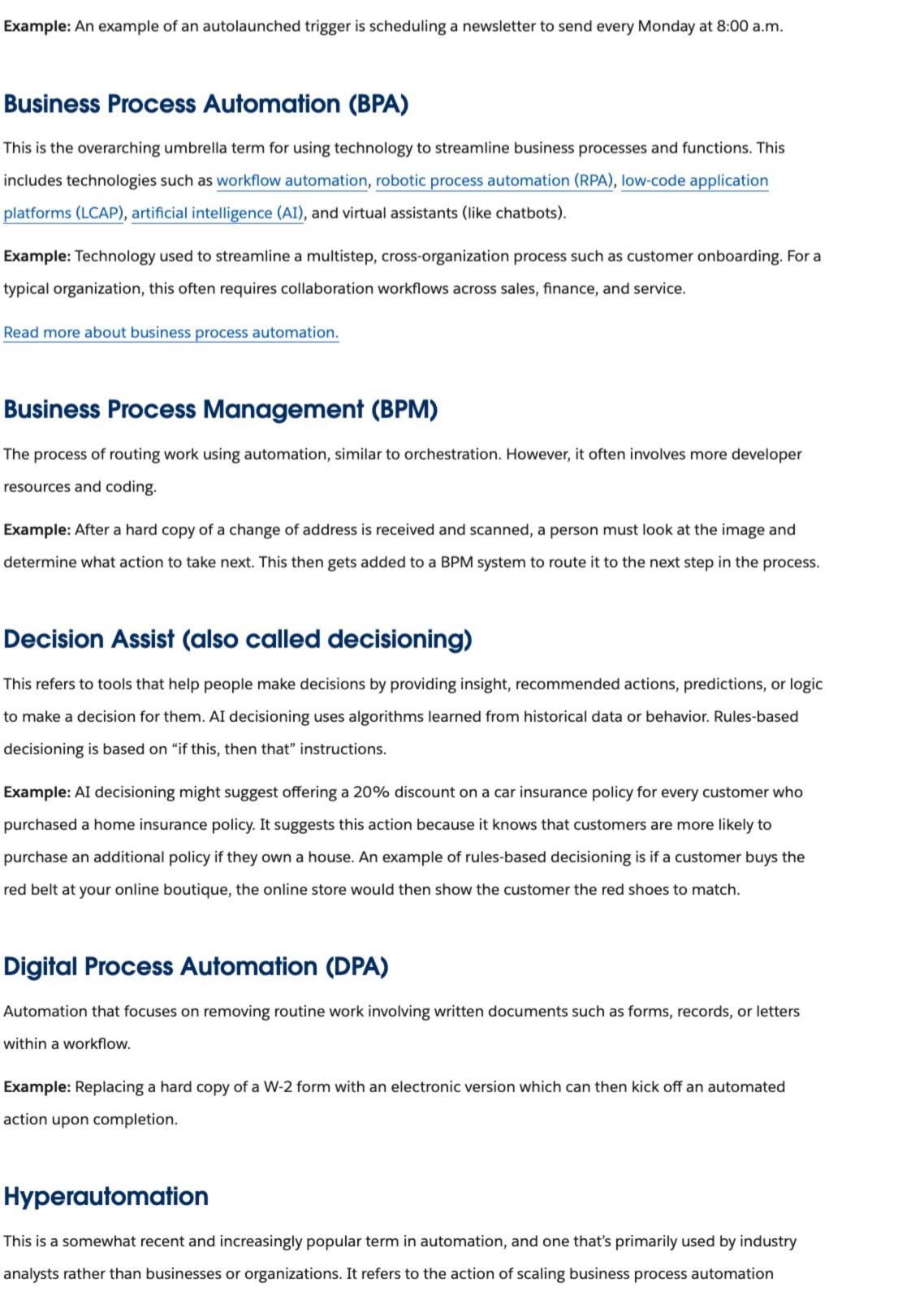
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This refers to the technology that manages marketing processes and multistep campaigns across multiple channels.

Example: Coordinating an employee onboarding process by connecting the new hire paperwork workflow, IT

Example: Automatically routing cases to the right department and suggesting relevant knowledge articles to address

Example: Items left behind in an ecommerce shopping cart can trigger a reminder email after a preset number of

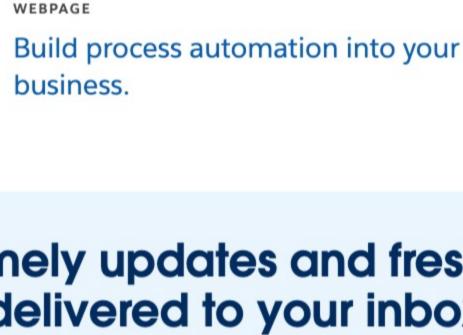
reduce bottlenecks and the potential for human error - leaving people to do what they do best: analyze data to **Example:** After manually updating a new employee's address in one system, the address is automatically updated in According to the "Trends in Workflow Automation" report, technical leaders who have implemented automation



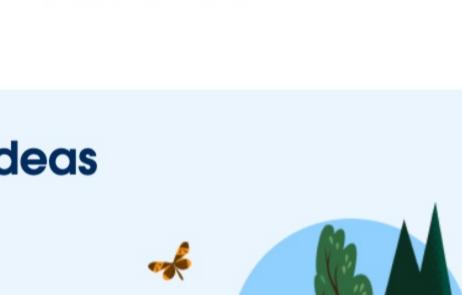
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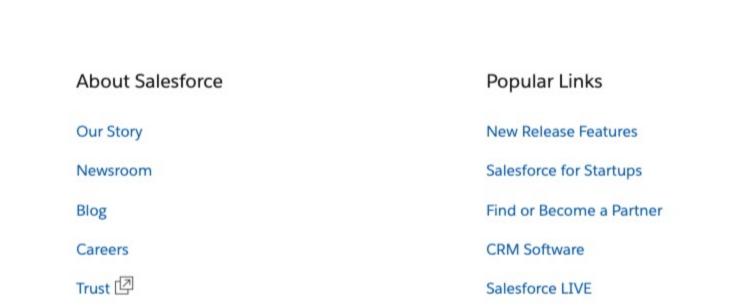


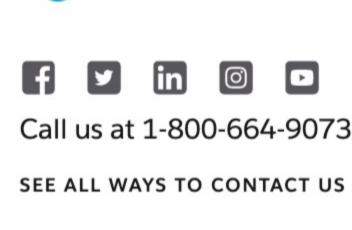
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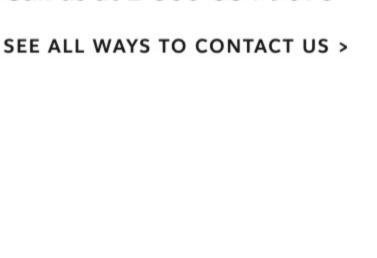
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