

x

» »



# Robotic Process Automation: 101 RPA Bots

Explore ideas, customize processes, and automate work

x





## How to read 101 RPA Bots Book

101 RPA Bots by ElectroNeek is a collection of real companies' automation ideas, RPA cases, and pre-built automation examples for companies of all sizes.

There is no better way to increase your understanding of Robotic Process Automation than to study how other companies, departments, and teams have automated their workflow using bots.

Unlike any other collection of RPA use cases, this one has a powerful feature: your company can get all these bots up and running quickly by customizing reusable components and launching them with the ElectroNeek Bot runner, a free software program that requires no licensing.

We hope you enjoy exploring this book and the ElectroNeek Bot Library, where our team and partners publish new bots every week.

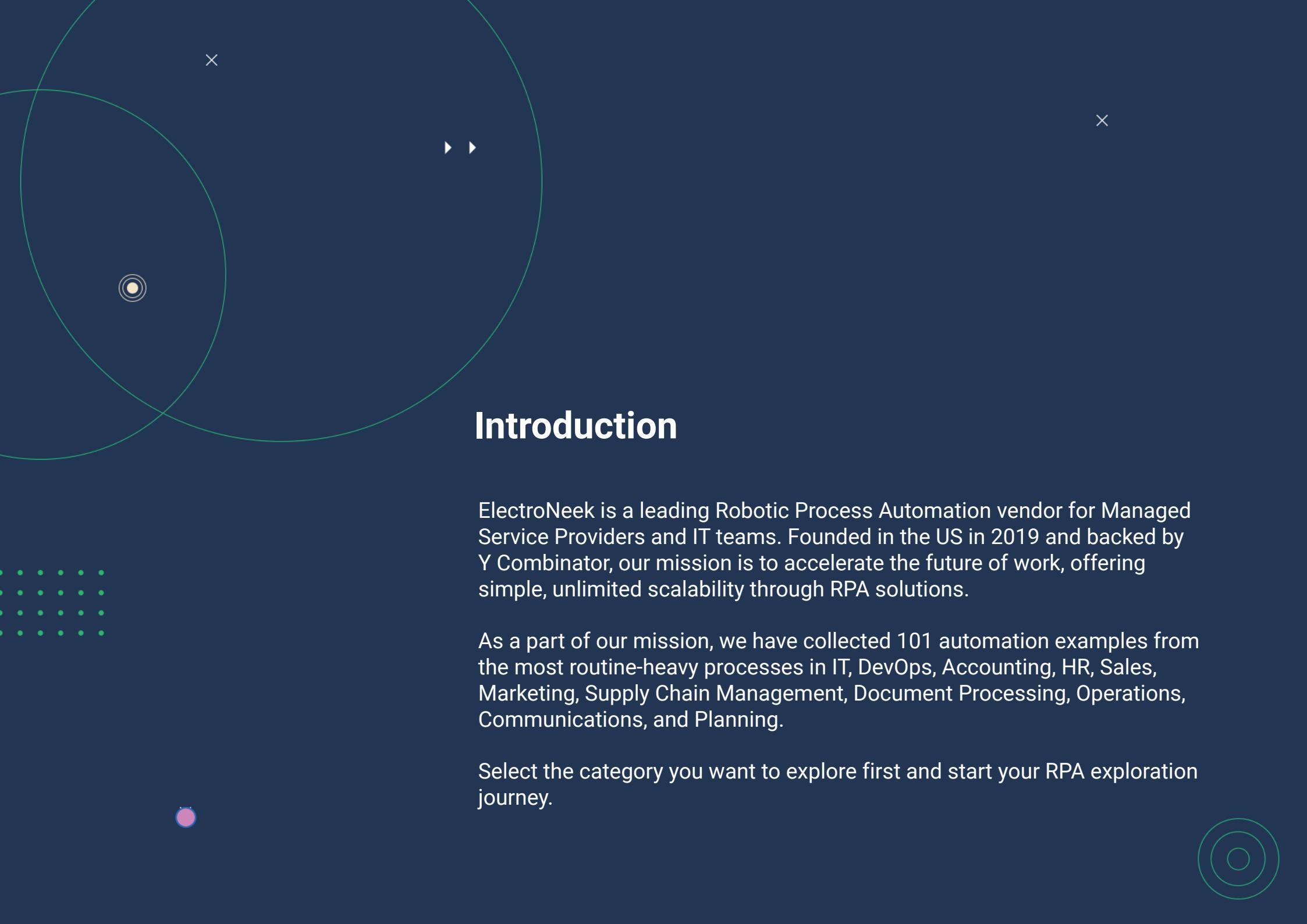
Happy automation,  
The ElectroNeek Team



# Table of Contents

- 03 Introduction
- 05 Sales bots
- 19 Software Automation bots
- 31 Marketing bots
- 39 Supply Chain Management bots
- 42 IT
- 49 DevOps
- 53 Hire to Retire
- 63 Communications bots
- 74 Finance and Accounting bots
- 86 Operations
- 97 Document Processing
- 108 Strategy & Planning





# Introduction

ElectroNeek is a leading Robotic Process Automation vendor for Managed Service Providers and IT teams. Founded in the US in 2019 and backed by Y Combinator, our mission is to accelerate the future of work, offering simple, unlimited scalability through RPA solutions.

As a part of our mission, we have collected 101 automation examples from the most routine-heavy processes in IT, DevOps, Accounting, HR, Sales, Marketing, Supply Chain Management, Document Processing, Operations, Communications, and Planning.

Select the category you want to explore first and start your RPA exploration journey.

# 01.

## Customer onboarding



### BOT CATEGORY

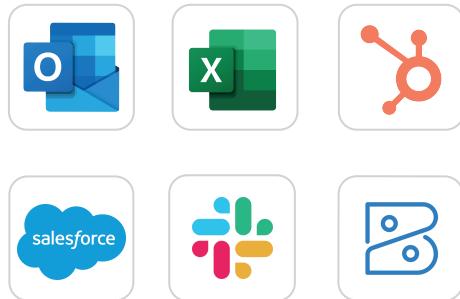
Sales

### Case for Automation

The customer onboarding process involves multiple parties that are critical to the customer journey, including sales, administrative, accounting, administrative, and IT teams.

A slow and inefficient onboarding process may lead to customer dissatisfaction and poor client retention.

### AUTOMATED SOFTWARE



### Bot Activities

- Collects customer-related documents
- Creates new client entry in tax software
- Extracts customer details from forms and documents
- Inputs client details into management/service management software
- Schedules next communication steps
- Emails stakeholders a report upon onboarding completion
- Sends stakeholders messenger notifications upon onboarding completion

## 02.

# Time zones conversion



### BOT CATEGORY

Sales

### Case for Automation

When you need to work across different time zones, thinking in terms of working hours, cultures are challenging to get used to. Instead of searching locations and setting the time manually, a time zone conversion bot helps convert to the date and time of the required time zone in 12/24 hours format making it easy to schedule calls or meetings.

### AUTOMATED SOFTWARE



### Bot Activities

- Analyzes the local date and time.
- Converts and displays the time and date in the required format for a specific time zone.
- Adjusts the time for Daylight saving if required.
- Allows the user to preview how the time and date appear in various settings.



## 03.

# Eligibility checking

### BOT CATEGORY

Sales

### Case for Automation

Departments such as sales, procurement, accounting, and HR may be required to perform eligibility checking. This task involves carrying out repetitive actions on various websites such as performing queries, copying relevant information, and pasting it into the relevant systems.

### AUTOMATED SOFTWARE



### Bot Activities

- Creates list of relevant websites
- Performs queries on selected websites
- Checks eligibility status
- Copies relevant information
- Inputs information collected into Excel spreadsheet
- Uploads relevant documents for selected sources based on status
- Creates report on query status
- Sends report to stakeholders

# 04.

## Sales to service handoff



### BOT CATEGORY

Sales

### AUTOMATED SOFTWARE



### Case for Automation

The timely transition of a client from sales teams to customer service is a vital business process that directly impacts overall customer experience and retention. In order to achieve operational excellence executives perform multiple manual tasks during a workday to ensure the appropriate procedures are followed. Automation of such tasks could save a significant amount of time impacting accurate decision-making.

### Bot Activities

- Logs into Sales system using managers' credentials
- Opens the Deals section
- Checks the prospects statuses, tags and notes
- Tags the prospects with the delayed onboarding
- Creates reports based on the tagged data
- Sends reports to executives with the data collected

# 05.

## Contact list validation



### BOT CATEGORY

Sales

### Case for Automation

Contact list validation is an important process for sales and marketing. Even with various tools that help automate contact list validation, the repetitive tasks associated with this process may be time consuming.

### AUTOMATED SOFTWARE



### Bot Activities

- Logs into corporate systems where data for validation is stored
- Opens Excel files where data for validation is stored
- Runs e-mail validation service and checks data for spam and broken addresses
- Creates Excel report with validated data statuses
- Emails Excel file to stakeholders • Notifies stakeholders of amount of data processed

# 06.

## Contact list enrichment



### BOT CATEGORY

Sales

### Case for Automation

Contact list enrichment is an integral part of sales operations. Sales teams may use various channels to find prospects' contact information, and this manual data collection may take up to 8 hours a day, impacting sales teams' productivity and ability to engage in other tasks.

### AUTOMATED SOFTWARE



### Bot Activities

- Logs into LinkedIn account using an employee's credentials
- Enters Sales Navigator
- Sets filters according to predefined criteria
- Collects data from profiles found
- Creates an Excel spreadsheet with this data
- Emails stakeholders an Excel file with data collected

# 07.

## Returns processing



### BOT CATEGORY

Sales

### AUTOMATED SOFTWARE



### Case for Automation

Returns processing is a complex and costly operation for any e-commerce organization. Apart from impacting your client relations, it can affect your entire supply chain as well as your accounting. Returns processing requires a number of manual tasks, which can result in lost productivity, errors in data entry, and unanticipated expenses.

### Bot Activities

- Logs into ERP and ecommerce systems from relevant accounts
- Extracts data on returns from e-commerce and ERP systems
- Executes processing of partial returns for an order
- Automates return approvals
- Adds returns information in Excel in a structured format
- Adds tags to returns based on product category or reason for return
- Triggers tasks for each return case based on predefined criteria
- Performs automated validation between systems
- Creates monthly reports on return statistics
- Emails stakeholders consolidated reports

# 08. Sales ROI calculator



## BOT CATEGORY

Sales

## Case for Automation

CRM systems contain key information on sales teams activities, such as leads and closed deals. Nonetheless, they do not reflect all of the direct and indirect expenses associated with sales teams. In order to calculate marketing ROI, the Head of Sales must consult multiple systems and consolidate data into a single spreadsheet.

## AUTOMATED SOFTWARE



## Bot Activities

- Collects data on sales expenditures from accounting, sales, and management systems
- Collects data on the value of deals closed by sales teams
- Consolidates profits and expenses into a separate spreadsheet
- Calculates ROI based on consolidated data
- Emails final report to stakeholders
- Emails stakeholders consolidated reports

# 09.

## RFP monitoring and bidding



### BOT CATEGORY

Sales

### Case for Automation

RFP monitoring and bidding is a labor-intensive procurement process that requires in-depth searching of hundreds of websites to find relevant open bids. After the bids are located, sales representatives must reconcile the bid requirements and business qualifications. Only after the requirements are met may bid preparation commence. This process costs sales managers around 100 hours of productive time per year.

### AUTOMATED SOFTWARE



### Bot Activities

- Searches relevant websites for industry-specific bids and RFPs
- Selects relevant bids and RFPs according to preset criteria
- Reconciles bid requirements with company qualifications and procurement document data
- Sorts list of bids and tags relevance
- Emails stakeholders the most relevant RFPs and bids, as well as notifications of procurement process status

# 10. Sales bonus calculator



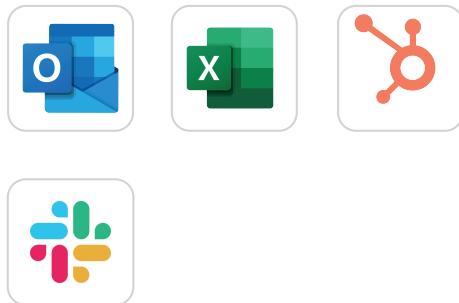
## BOT CATEGORY

Sales

## Case for Automation

CRM systems contain key information on deals and sales teams' activities. However, CRM systems do not contain sufficient data to calculate sales bonuses. Calculating bonuses requires the consolidation of data scattered across multiple sources, including accounting, management, and administrative systems as well as internal sales team spreadsheets.

## AUTOMATED SOFTWARE



## Bot Activities

- Opens folders containing relevant spreadsheets and files
- Extracts data from relevant fields in sales files and systems
- Consolidates extracted data into sales bonus calculation system/file
- Calculates bonus according to preset formulas and data in relevant fields
- Emails team members notifications of their appointed bonuses



# 11.

## Performance management

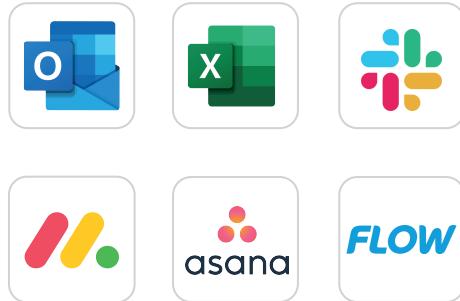
### BOT CATEGORY

Sales

### Case for Automation

Performance management involves data analysis from various sources and task management systems. Collecting this information costs management hours of productive time and requires a meticulous approach.

### AUTOMATED SOFTWARE



### Bot Activities

- Collects and consolidates data on a team's performance from various spreadsheets, dashboards, and messengers into one performance master file
- Reconciles team member metrics and data with a master file containing preset parameters and target metrics
- Applies relevant tags for HR managers
- Sends alerts with information on best- and worst-performing team members
- Triggers alerts to reliable managers



12.

## Automatic CRM task tracker

### BOT CATEGORY

Sales

### Case for Automation

Sales managers must assign customer service representatives a variety of tasks throughout the process of securing new accounts. The speed of communicating the tasks to the sales team is crucial when it comes to closing a deal quickly and providing enhanced customer service.

### AUTOMATED SOFTWARE



### Bot Activities

- Assigns team members specific tasks via email or messaging according to predefined workflow
- Notifies sales managers to provide CRM task status via email or messaging
- Tags and filters tasks in CRM system

# 13.

## Custom deal monitoring



### BOT CATEGORY

Sales

### Case for Automation

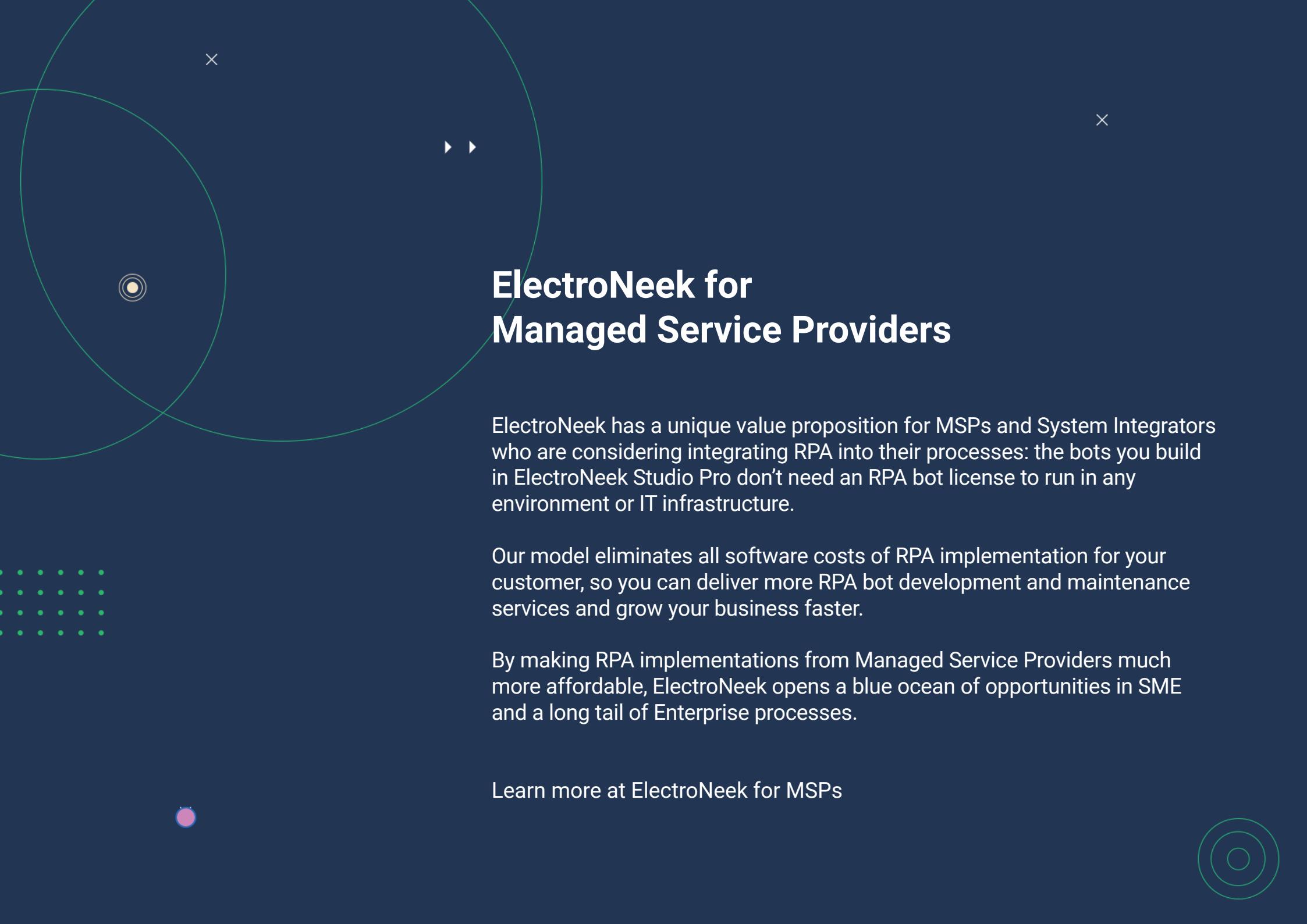
Sales managers often face challenging situations that require custom CRM monitoring. This may include analyzing the speed at which sales reps work with prospects or tracking whether they have performed certain steps in CRM systems, such as sending notifications upon completing a task.

### AUTOMATED SOFTWARE



### Bot Activities

- Monitors sales CRM to detect areas for improvement
- Triggers email or Slack messages based on predefined criteria
- Sends managers alerts for any activities that deviate from predefined criteria
- Creates a list of activities in a CRM system based on predefined criteria



## ElectroNeek for Managed Service Providers

ElectroNeek has a unique value proposition for MSPs and System Integrators who are considering integrating RPA into their processes: the bots you build in ElectroNeek Studio Pro don't need an RPA bot license to run in any environment or IT infrastructure.

Our model eliminates all software costs of RPA implementation for your customer, so you can deliver more RPA bot development and maintenance services and grow your business faster.

By making RPA implementations from Managed Service Providers much more affordable, ElectroNeek opens a blue ocean of opportunities in SME and a long tail of Enterprise processes.

Learn more at [ElectroNeek for MSPs](#)

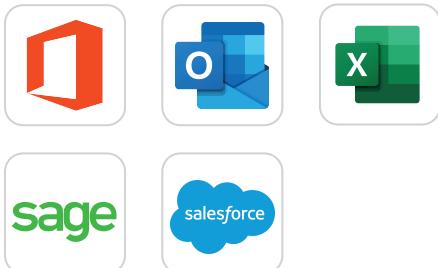


## BOT CATEGORY

Software Automation

---

## AUTOMATED SOFTWARE



## Case for Automation

Magento is a platform that allows users to build and manage e-commerce websites. Apart from its basic e-commerce features, the tool offers capabilities for uploading content tailored to customer segments and launching targeted promotions supported by SEO advice and marketing recommendations. Although the tool has great functionality, it cannot be leveraged to the fullest without automation—performing frequent manual tasks in Magento would consume the lion's share of your time.

## Bot Activities

- Imports Magento orders into MS Excel spreadsheet
- Notifies stakeholders of new Magento orders by email/messenger
- Adds Magento customers to corporate CRMs as new contacts
- Imports data on new products from MS Excel spreadsheets into Magento
- Creates sales receipts and invoices for new Magento orders in accounting software
- Generates a list of Magento orders and emails it to stakeholders
- Updates product data

# 15. QuickBooks



## BOT CATEGORY

Software Automation

## AUTOMATED SOFTWARE



## Case for Automation

One of the most tedious parts of accounting operations is data processing. Manually generating sales receipts and invoices, sending emails, and creating reports in QuickBooks can limit teams' productivity and overall efficiency. Here, automation may come in handy.

## Bot Activities

- Logs into QuickBooks accounts using relevant user credentials
- Imports QuickBooks invoices into new Excel spreadsheet rows
- Generates sales receipts in QuickBooks for updated MS Excel spreadsheets
- Generates MS Excel rows for new QuickBooks payments
- Creates rows in Excel for QuickBooks expenses
- Updates mailing service subscriber lists to include new QuickBooks customers
- Sends email notifications for new QuickBooks invoices and payments

# 16. Sage



## BOT CATEGORY

Software Automation

## AUTOMATED SOFTWARE



## Case for Automation

Sage is accounting software that supports business owners in accounting process automation. Sage's platform allows organizations to track all of their financial operations, helping them forecast cash flow, invoice, and payment management; reduce manual data entry; and build clear reports from the cloud and mobile devices. Further automating operations within Sage modules frees up accountants' time for analytical tasks and reduces inefficiencies in their daily routine.

## Bot Activities

- Automates accounts receivable and payable processing among multiple sources
- Automates customer onboarding within Chart of Accounts in SBCA from a custom Excel spreadsheet
- Executes data entry and exports data within Sage invoicing processes
- Collects and consolidates transactions for further reconciliation
- Automates pre-payment validation and reconciliation
- Sends email/messenger notifications of pre-payment exceptions to relevant managers

# 17. Google Analytics



## BOT CATEGORY

Software Automation

## AUTOMATED SOFTWARE



## Case for Automation

Google Analytics is a powerful tool that allows teams to analyze user acquisition channels, time spent on various pages, user behavior, and goal completion. Automating some of the tasks performed in Google Analytics could make the data collected even more impactful.

## Bot Activities

- Creates new rows in Excel when a new goal is created in Google Analytics
- Schedules report sending from Google Analytics to relevant email addresses
- Sets custom alerts when there are changes in metrics, e.g., a significant increase/decrease in conversion rate
- Extracts data from multiple Google Analytics reports and consolidates it into one Excel report
- Sets tags for custom events such as scrolling through content, watching a video, or downloading website materials
- Sends transaction data from payment systems to Google Analytics
- Emails reminders of significant reports in Google Analytics



## Internet Explorer

### BOT CATEGORY

Software Automation

### AUTOMATED SOFTWARE



### Case for Automation

Many corporate systems are Internet Explorer-based. Businesses use Internet Explorer for services such as corporate portals, HR systems, and corporate IT help desks. Tasks such as performing data imports and exports, completing web forms, and uploading files into corporate systems on Internet Explorer can take a huge amount of time when done manually.

### Bot Activities

- Opens IE browser and tabs
- Enters data from Excel spreadsheets into corporate websites open in IE
- Logs into websites open in IE
- Uploads documents and files into corporate systems open in IE
- Enters relevant URLs or keywords in IE and conducts a search
- Transfers data from web pages open in IE to any desktop systems

# 19.

## Chrome



### BOT CATEGORY

Software Automation

### Case for Automation

Chrome-based web systems are the core of any business. Employees spend a great deal of time opening websites and tabs, screen scraping, performing data imports and exports, and completing web forms in Chrome. These common tasks, when performed manually, can consume a huge amount of time.

### AUTOMATED SOFTWARE



### Bot Activities

- Opens Chrome browser and Chrome tabs
- Downloads and activates Chrome extensions
- Enters data from Excel spreadsheets into websites open in Chrome
- Logs into websites open in Chrome
- Closes irrelevant tabs in Chrome
- Enters relevant URLs or keywords in Chrome and conducts a search
- Transfers data from web pages open in Chrome to any desktop systems

# 20.

## Docusign



### BOT CATEGORY

Software Automation

### AUTOMATED SOFTWARE



### Case for Automation

DocuSign is a document processing tool that allows users to sign digital documents and forms electronically. Although DocuSign accelerates business transactions, employees must still execute multiple manual labor-intensive tasks related to these transactions, such as closing deals in CRM, sending reminders, and creating reports.

### Bot Activities

- Emails stakeholders upon completion of DocuSign envelopes
- Sends Slack messages upon signing of DocuSign envelopes
- Uploads signed DocuSign documents to relevant desktop folders
- Creates or updates accounts in CRM upon signing of DocuSign documents
- Creates tasks in CRM upon signing of DocuSign documents
- Adds rows and columns in Excel upon signing or completion of DocuSign documents
- Adds contacts from DocuSign documents to mail service subscribers list
- Creates or updates HubSpot contacts for newly sent or completed DocuSign documents

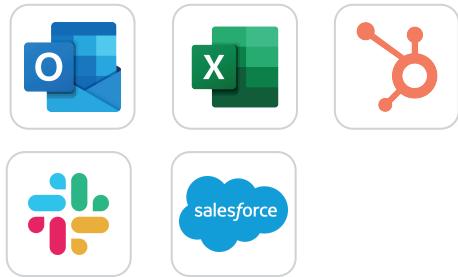


# 21. Slack

## BOT CATEGORY

Software Automation

## AUTOMATED SOFTWARE



## Case for Automation

Slack is one of the most popular business messaging apps in use today. With Slack, you can communicate with team members, manage projects, share files and links, and receive notifications related to project updates. Although Slack is a convenient tool with many useful features, it still involves a significant amount of manual tasks that could be made more efficient through automation.

## Bot Activities

- Sends Slack messages upon updates to business files, Excel spreadsheets, and corporate databases
- Sends Slack notifications upon the completion of web forms
- Shares social media posts
- Sends notifications by email to notify user of a new Slack message
- Duplicates web form responses in Slack channels
- Consolidates Slack messages into a single Excel spreadsheet
- Pulls lead data from CRM into Slack
- Creates custom reports based on Slack activities

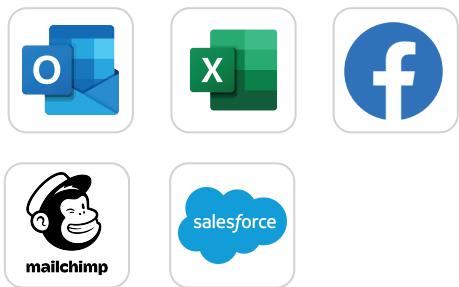
# 22. Salesforce



## BOT CATEGORY

Software Automation

## AUTOMATED SOFTWARE



## Case for Automation

Salesforce is a leading sales management tool; however, it is still a complex CRM in which multiple tasks must be executed manually by sales reps. Automating tasks in Salesforce is time consuming and requires expert technical skills. With ElectroNeek, most of these tasks can be automated without advanced technical skills.

## Bot Activities

- Creates custom Salesforce database tables based on Excel spreadsheet data
- Imports leads from Excel into Salesforce
- Generates Excel spreadsheets based on Salesforce cases
- Adds Salesforce contacts to email subscriber lists
- Imports leads from email into Salesforce
- Emails stakeholders reminders on custom events or activities from Salesforce
- Creates Slack notifications on new Salesforce leads
- Imports new leads from Facebook into Salesforce
- Creates consolidated reports from Salesforce data
- Emails stakeholders custom reports from Salesforce

# 23. SAP



## BOT CATEGORY

Software Automation

## AUTOMATED SOFTWARE



## Case for Automation

SAP is a complex software system for mid-size and enterprise companies. It is used to perform a variety of managerial and administrative tasks such as accounting transactions, human resources documentation, and interdepartmental communication. The manual control and execution of tasks within such a complicated system requires a high level of organization and costs team members hours of productive time.

## Bot Activities

- Logs into SAP using relevant user credentials
- Uses accounting and financial modules in SAP, including payroll, transactions, and report management
- Manages candidate applications within SAP HR modules
- Executes tasks within warehouse, transportation, and inventory management modules in SAP
- Inputs data into SAP system for transaction processing
- Creates reports on projects executed in SAP
- Sends emails or messenger alerts upon completion of tasks in SAP
- Uploads and exports documents from SAP

# 24.

## Shopify



### BOT CATEGORY

Software Automation

### AUTOMATED SOFTWARE



### Case for Automation

Shopify is a versatile e-commerce platform, with features including abandoned cart recovery notification, leading payment solutions, digital storefronts, and even content creation. Although it is an excellent tool, manual operations management in Shopify can cost your team more than 40 hours per week of productive time that could be used for other activities vital to your e-commerce business.

### Bot Activities

- Logs into Shopify using relevant user credentials
- Automates order shipping by importing Shopify orders, selecting the best delivery option based on multiple criteria, and sending package tracking data to the purchaser
- Automates order processing and stock allocation
- Generates financial documents such as invoices, delivery notes, credit notes, and cash receipts
- Automates marketing activities such as email marketing segmentation, email chains, a/b testing, social media posting, and distribution of Shopify store blog content



“The future of RPA is SMB and mid-market. As the fastest growing RPA vendor, we believe that laying foundations for the new generation of Managed Service Providers that deliver RPA is the best way to bring diverse talent to this business and enable RPA-powered digital transformation worldwide”

Sergey Yudovsky, CEO, ElectroNeek

# 25. Google image search



## BOT CATEGORY

Marketing

## AUTOMATED SOFTWARE



## Case for Automation

Finding images on Google can be time consuming, and the results may not match your search query terms. A bot can perform sophisticated image searches and rapidly evaluate visual content on Google. It can quickly search through banners/buttons, color and black-and-white images, and graphics as well as tags, returning images matching the required criteria. This capability is of immense value to businesses, as it can help them gauge how strongly they are represented in Google image search.

## Bot Activities

- Recognizes search command (image/text/URL) and file extensions defined by a user
- Searches Google images
- Analyzes visual content of online images
- Downloads relevant pictures to designated folder

# 26.

## Speech to text conversion



### BOT CATEGORY

Marketing

### Case for Automation

Various content creation activities involve the conversion of speech to text. Transcribing interviews and podcasts, for example, allows companies to share the text on their company website. But when performed manually, voice transcription can be extremely time consuming.

### AUTOMATED SOFTWARE



### Bot Activities

- Recognizes relevant text from Word document
- Recognizes relevant text from web pages
- Encodes relevant text data into 2D QR code
- Saves QR code as image



## BOT CATEGORY

Marketing

## Case for Automation

Ad campaigns require a meticulous approach to data analytics and reporting. Marketing professionals spend hours weekly collecting data from various ad accounts to analyze the success of marketing campaigns and update strategies accordingly. This data includes details on budgets, actual expenditures, leads, conversion rate, etc.

## AUTOMATED SOFTWARE



## Bot Activities

- Opens browser, logs into ad management systems
- Collects data on campaign results from relevant ad management system fields
- Consolidates data in separate spreadsheet
- Sorts campaign data by preset categories and parameters
- Creates structured campaign report with details on budgets spent, leads attracted, value of leads, and any other required information

# 28.

## Spam and promo email removal



### BOT CATEGORY

Marketing

### AUTOMATED SOFTWARE



### Case for Automation

There is no foolproof way to stop fake email sign-ups, pseudo invites, promotional links, and phishing emails from invading your mailbox. Although email services usually have a filter that flags suspicious messages, some emails are still able to trick the filter and land in your inbox. At the same time, some legitimate business correspondence always ends up in the junk folder. A bot can quickly delete true spam emails, as they use machine language to recognize them. They can also highlight legitimate email that has landed in the junk folder by mistake.

### Bot Activities

- Organizes related emails into different bundles, such as emails from social networks, and allows user to delete a bundle with a single click after reviewing
- Unsubscribes from emails on the recipient's behalf and blocks senders' email addresses
- Archives old emails automatically
- Creates daily summary

# 29.

## Custom multi-channel analytics



### BOT CATEGORY

Marketing

### AUTOMATED SOFTWARE



### Case for Automation

It can take a marketing team member 3 to 4 hours for to collect data on customer acquisition channels, report which channels perform best, and provide the most accurate CAC economics. After the data is collected, employees often build a manual internal report in which data is aggregated and rule-based analysis is applied. This data collection takes more time than actual marketing analysis, which adversely impacts the overall quality of marketing campaigns.

### Bot Activities

- Collects data from marketing CRM, Analytics systems on customer acquisition channels
- Inserts collected data into relevant fields in marketing report
- Defines best-performing channels and tags them
- Emails marketing report to stakeholders
- Notifies responsible team member of report completion status

# 30. QR-code generation



## BOT CATEGORY

Marketing

## Case for Automation

When creating web pages, marketing teams use various tools to generate QR codes from text. This task can be quite time consuming when there are multiple pages requiring numerous codes.

## AUTOMATED SOFTWARE



## Bot Activities

- Recognizes relevant text from Word document
- Recognizes relevant text from web pages
- Encodes relevant text data into 2D QR code
- Saves QR code as image

# 31.

## Website visitor monitoring



### BOT CATEGORY

Marketing

### Case for Automation

Website visitor behavior is a key factor to consider when developing your marketing and sales strategy. However, tracking this behavior on a regular basis can take an enormous amount of time, as it involves constant toggling between various dashboards and reports in website analytics systems.

### AUTOMATED SOFTWARE



### Bot Activities

- Triggers tasks in CRM or email based on predefined website events
- Triggers tasks in CRM or email based on real-time website statistics
- Notifies stakeholders of certain website events
- Creates reports on website activities and events
- Sends website visitor reports to executives



32.

## Text-to-Speech Converter

### BOT CATEGORY

Marketing

### AUTOMATED SOFTWARE



### Case for Automation

Text content is useful, but it may not be the best option for engaging users on your website. Regardless of how valuable your content is, its audio representation will make it more appealing. Catering to a shorter attention span, audio content offers convenience to the “digital generation,” enabling them to multitask as they listen. But converting text to speech manually is extremely time consuming, and it is challenging to maintain consistent voice quality, accuracy, and fluency. Fortunately, a bot can quickly convert text to human speech in multiple languages without any errors.

### Bot Activities

- Recognizes relevant text from websites and Word documents
- Converts text into human speech
- Reads text from images
- Produces speech/audio with correct intonation and cadence

# 33.

## Order placement and scheduling



### BOT CATEGORY

Supply Chain Management

### Case for Automation

In many business units, procurement is a standard, yet labor-intensive process that involves navigating many websites, filtering information, checking product availability, and placing orders in multiple accounts. Scheduling supply delivery is a time-consuming task that involves clicking through many screens in legacy websites, a procedure for which bots are well suited.

### AUTOMATED SOFTWARE



### Bot Activities

- Navigates browser to apply filters and check availability of required products
- Logs into multiple accounts and places orders
- Places orders on relevant sources selected by preset criteria
- Creates list of orders placed
- Checks shipping slots and schedules order delivery
- Emails order-processing status updates to stakeholders

# 34.

## Best price monitoring



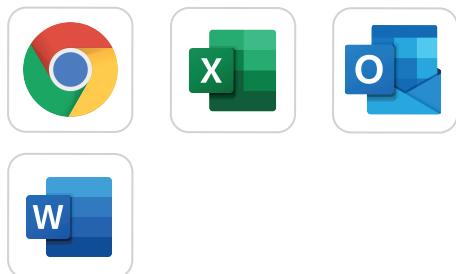
### BOT CATEGORY

Supply Chain Management

### Case for Automation

Procurement managers typically spend 2 to 3 hours per week searching multiple websites for the best products at the best prices. This key procurement task is extremely repetitive, and extracting relevant data and entering it into a spreadsheet requires significant manual effort. What's more, such spreadsheets must be updated frequently.

### AUTOMATED SOFTWARE



### Bot Activities

- Navigates predefined list of websites to find relevant products
- Analyzes prices for the same products on various websites
- Detects best prices for list of predefined items
- Extracts price values from relevant websites
- Inputs product data into relevant Excel spreadsheet or corporate system
- Updates pricing information on a regular basis
- Creates reports on best prices revealed
- Emails updated pricing reports to stakeholders



# ElectroNeek for IT Teams

**Adopt and scale RPA without breaking the bank**

Build Robotic Process Automation bots quickly with an IDE that balances no-code/low-code functionality for junior developers with professional RPA features for experienced developers. Run bots on any computer without an RPA bot license.

*"The interface is efficient and intuitive. The support has been exceptional while getting started with the product."*

Keith Cote, VP of IT, UFP Technologies

# 35.

## Password generation



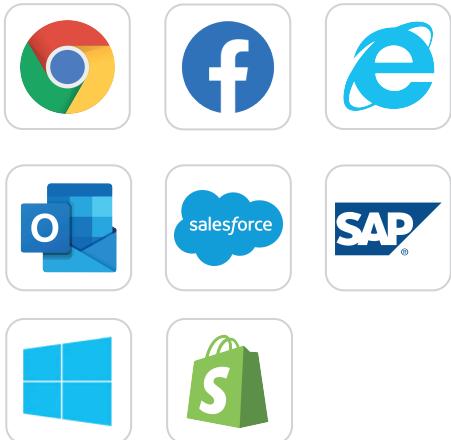
### BOT CATEGORY

IT

### Case for Automation

Having readable and unique password generation may not be enough to protect your organization from a dictionary attack. Adding extra features such as different levels of password complexity (weak, normal, strong, insane, etc.) along with customized settings and basic multi-language support will help stop hackers and prevent failures when passwords expire. Automation can support these features.

### AUTOMATED SOFTWARE



### Bot Activities

- Reads provided inputs
- Generates passwords following desired requirements
- Stores output file (.text, etc.) in designated folder

# 36.

## Legacy system automation



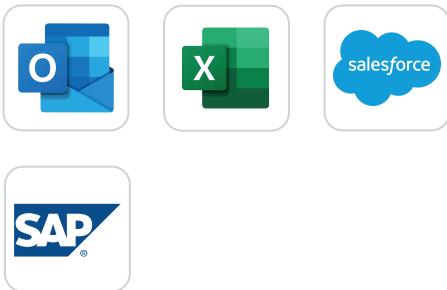
### BOT CATEGORY

IT

### Case for Automation

Legacy systems are computer systems that organizations continue to use even after they go out of date because they contain key business data. With time, such systems are challenging to maintain due to unsupported components and difficulty in enhancing and adding features. Therefore, they eventually become low-performing in meeting employees and customers' needs. However, even legacy systems can integrate automation to reduce time-consuming manual activities. RPA bots that work on the surface of applications can automate legacy system tasks.

### AUTOMATED SOFTWARE



### Bot Activities

- Executes automations across common legacy environments (email system, CRM, finance system)
- Transfers data from legacy systems to external and local sources (spreadsheets, cloud, or other systems)
- Imports data from external sources into legacy systems
- Updates data stored in legacy systems
- Logs into legacy systems using user credentials
- Creates reports based on tasks completed in legacy systems
- Sends alerts on predefined activities executed in legacy systems

# 37. Printer maintenance



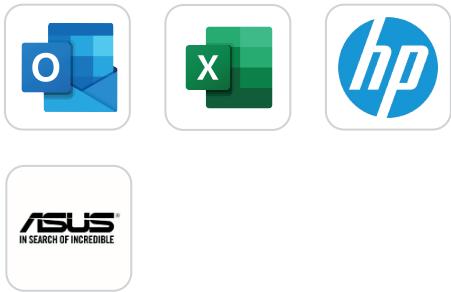
## BOT CATEGORY

IT

## Case for Automation

Maintenance of copiers, printers, or scanners is a basic office operation that may take a significant amount of employees' time. Bots can automate maintenance routines, freeing up teams' productive time and improving both printer maintenance compliance and operational efficiency.

## AUTOMATED SOFTWARE



## Bot Activities

- Sends alerts when printer ink needs refilling
- Updates printer drivers
- Turns printer device on or off as needed
- Sends alerts when printer device starts working slowly
- Sends troubleshooting reports to stakeholders

# 38. IT data migration



## BOT CATEGORY

IT

## Case for Automation

IT data migration involves the transfer of data from one storage or computing system to another.

This function is necessary in a variety of situations, such as when a server is being replaced, storage devices are undergoing changes, or there is a need to consolidate data in one data center.

IT data migration is also integral to the replacement of on-premise solutions with cloud environments, a process that may raise security and resource management concerns.

## AUTOMATED SOFTWARE



## Bot Activities

- Recognizes XML elements and attributes
- Sorts IT data by file and folder
- Creates mapping documents
- Maps migrated data fields to target tables and fields
- Converts files into target formats
- Structures migrated data
- Updates data schemas regularly
- Creates regular reports on parts of IT data migrated
- Notifies IT managers at each step of migration

# 39.

## Testing



### BOT CATEGORY

IT

### Case for Automation

Testing is an integral part of any software development process. If executed manually, it can not only exponentially increase a QA team's workload; it can also result in bugs going undiscovered. Automation can help avoid this outcome, saving your team time and project costs.

### AUTOMATED SOFTWARE



### Bot Activities

- Automates tasks within unit, API, and regression testing
- Automates testing hardware and software configurations
- Executes repetitive tests for various builds
- Automates tests that involve multiple data sets
- Executes testing on frequently used functionality for high-risk and error-condition generation
- Detects bugs
- Checks hundreds of code lines
- Reports on test status, initiation, and completion
- Reports on troubleshooting and issues solved within testing
- Compares expected and actual results upon test completion
- Sends custom notifications to stakeholders via email or messenger

# 40.

## Virtual Machine setup and maintenance



### BOT CATEGORY

IT

### AUTOMATED SOFTWARE



### Case for Automation

IT teams spend a significant amount of time setting up and maintaining virtual machines for employees. The time required for installing and updating software and drivers, as well as setting up operational systems, may vary depending on the IT infrastructure and the complexity of employee tasks. These installations and setup can be automated, allowing IT teams to spend their productive time more efficiently and significantly accelerating processes such as employee onboarding and offboarding.

### Bot Activities

- Builds and installs required software, drivers, and OS
- Sets up email service and corporate accounts
- Executes tasks required to configure workstation parameters
- Creates troubleshooting reports
- Notifies IT managers of security and technical issues
- Notifies IT managers of system bugs or slow-performing software
- Sends alerts when systems require updates

# 41.

## User setup and configuration



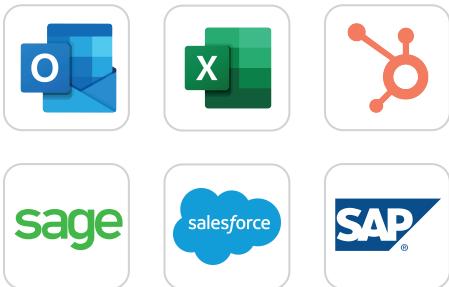
### BOT CATEGORY

IT

### Case for Automation

Apart from HR involvement, the onboarding process involves the IT department with configuring and setting up new users' workstations. This process—which includes installing software and drivers, as well as setting up OS in the IT infrastructure—may take up to 8 work hours when performed manually. This adversely affects the productivity of the IT team as well as the new employee.

### AUTOMATED SOFTWARE



### Bot Activities

- Builds list of relevant drivers, and OS in Excel spreadsheet
- Logs into corporate systems and sets up email service
- Creates accounts for relevant corporate CRM and ERP systems
- Configures user workstation parameters
- Creates report on each stage of setup and configuration
- Resolves inefficiencies and delays within IT onboarding process
- Emails stakeholders upon completion of tasks



## BOT CATEGORY

DevOps

## AUTOMATED SOFTWARE



## Case for Automation

In DevOps, configuration management is the process of setting up and managing the environments that host software. This process involves testing various environments for different purposes, e.g., unit, acceptance, end-user, and load system testing. With each stage of testing, these environments become harder to manage. Here, automated configuration management, which guarantees that these environments are optimal, can be applied.

## Bot Activities

- Sets up environments for configuration
- Sets up and configures user workstations
- Automates initial software configuration
- Automates initial legacy software configuration
- Compares expected and actual results upon completion
- Sends custom email/messenger notifications to administrators
- Sends report to managers upon process completion

43.



## Change approval

### BOT CATEGORY

DevOps

### AUTOMATED SOFTWARE



### Case for Automation

Change management is a key IT department function that includes multiple processes associated with managing the life cycle of internal and external changes to IT services. Compliance managers work with external change approval boards to ensure that all changes are compliant with the requirements. This complex process involves coordination among teams, multiple rounds of testing, and comprehensive monitoring before approval can be granted. It becomes even more complex when performed manually.

### Bot Activities

- Creates change approval applications
- Checks change approval applications for proper fulfillment
- Executes required changes in applications
- Categorizes incoming requests
- Administrates tickets and tasks in Jira and Zendesk
- Notifies DevOps teams on change approval request status



# Deployment (product update rollout)

## BOT CATEGORY

DevOps

## Case for Automation

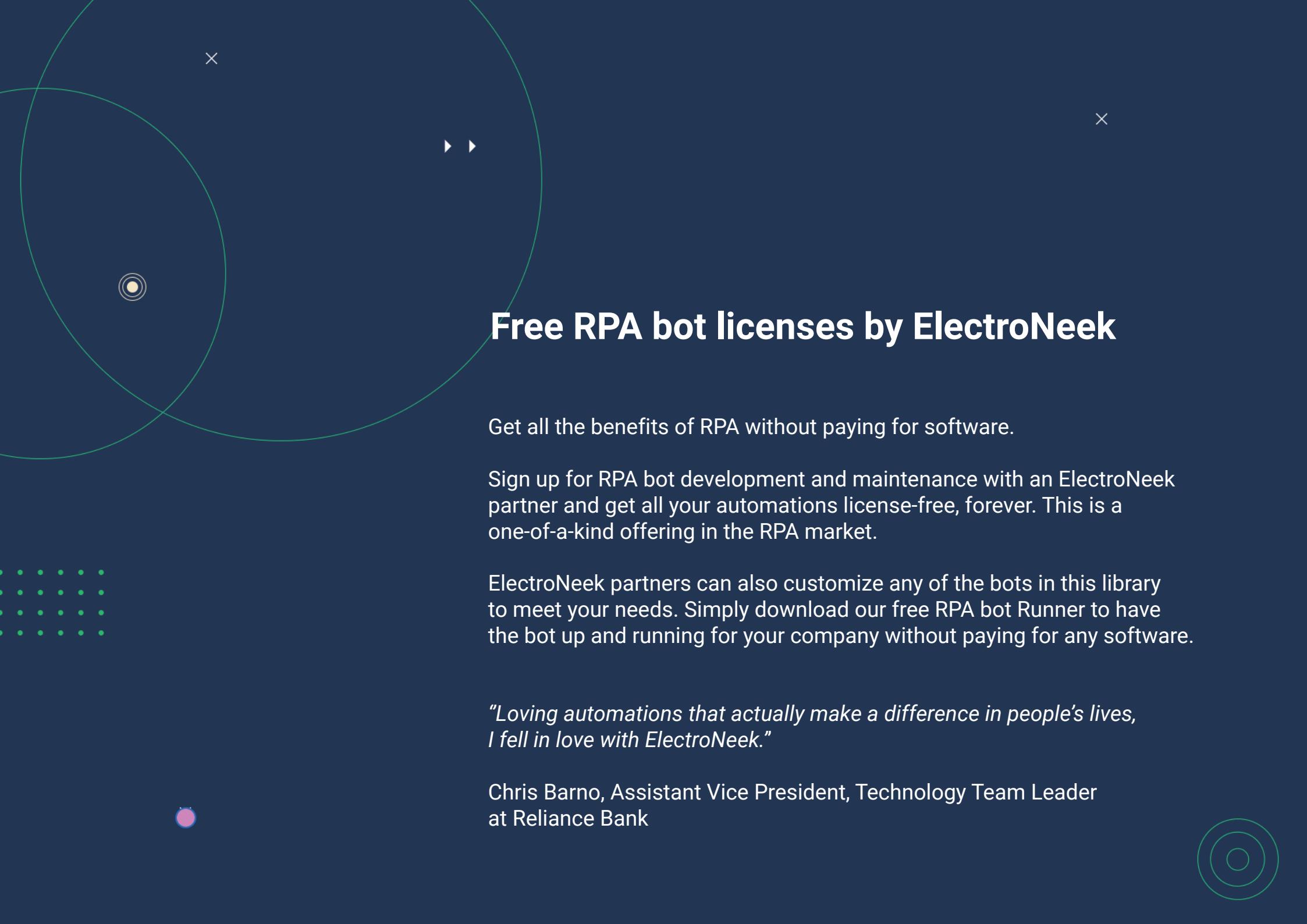
Product update rollout is a comprehensive process that incorporates many challenging tasks such as the management of multiple servers, hardware, and software across various locations; continuous bug detection and vulnerability patching; and facilitating downgrade processes. This monumental task is extremely challenging to execute perfectly without automation tools.

## AUTOMATED SOFTWARE



## Bot Activities

- Automates package delivery with releases and individual files
- Detects issues within deployment pipeline
- Creates backups
- Checks for successful deployment execution status
- Supports rollback scenarios
- Integrates with APIs
- Supports webhooks
- Sends email/messenger notifications upon completion of steps within the deployment pipeline
- Sends a report to managers upon process completion



## Free RPA bot licenses by ElectroNeek

Get all the benefits of RPA without paying for software.

Sign up for RPA bot development and maintenance with an ElectroNeek partner and get all your automations license-free, forever. This is a one-of-a-kind offering in the RPA market.

ElectroNeek partners can also customize any of the bots in this library to meet your needs. Simply download our free RPA bot Runner to have the bot up and running for your company without paying for any software.

*"Loving automations that actually make a difference in people's lives,  
I fell in love with ElectroNeek."*

Chris Barno, Assistant Vice President, Technology Team Leader  
at Reliance Bank



## New-hire contract creation

### BOT CATEGORY

Hire to Retire

### AUTOMATED SOFTWARE



### Case for Automation

The formal job offer, the first step in the employee onboarding process, is a multistep, time-consuming task.

HR must create a contract, email it to the new employee, wait for the signed response, and update their records.

A bot can streamline this process by automatically emailing a contract once a candidate is hired, notifying HR, and updating the employee's records after the contract is signed.

### Bot Activities

- Pulls candidate information from database after hire is confirmed
- Completes relevant information and emails contract
- Moves signed contract to HR database
- Creates/updates new employee record
- Notifies hiring manager via Slack once contract is signed and returned

# 46.

## LinkedIn candidate search



### BOT CATEGORY

Hire to Retire

### Case for Automation

LinkedIn is a trusted candidate search platform. However, the actual process of searching through relevant profiles in LinkedIn can be time consuming, requiring recruiters to perform repetitive filtering activities.

### AUTOMATED SOFTWARE



### Bot Activities

- Logs into a recruiter's profile using their credentials
- Enters predefined search parameters
- Detects profiles that meet parameters
- Exports relevant profiles into Excel file
- Emails Excel file to recruiter

# 47.

## Filtering CVs by keywords



### BOT CATEGORY

Hire to Retire

### Case for Automation

Human Resources teams receive numerous CVs which they must sort and categorize according to the relevance of candidates' skill set to open positions. This task can be laborious, taking up to 3 hours per day.

### AUTOMATED SOFTWARE



### Bot Activities

- Opens emails and downloads CVs in PDF and Word formats
- Opens job search websites and scrapes CVs for preset keywords
- Opens PDFs and Word files and scrapes them for preset keywords

**BOT CATEGORY**

Hire to Retire

---

**Case for Automation**

Operational managers spend anywhere from 30 minutes to several hours each week creating timesheets and compiling timesheet reports. Employees must log into the accounting system; record the dates, hours worked, and document number; save the document into the relevant local folder; and email stakeholders to notify them that the timesheet has been created.

**AUTOMATED SOFTWARE****Bot Activities**

- Logs into Sage 50 Payroll
- Selects relevant database in Sage 50 Payroll
- Selects relevant employees in Sage 50 Payroll based on preset criteria
- Imports prepared timesheets into relevant folder

# 49.

## Employee separation



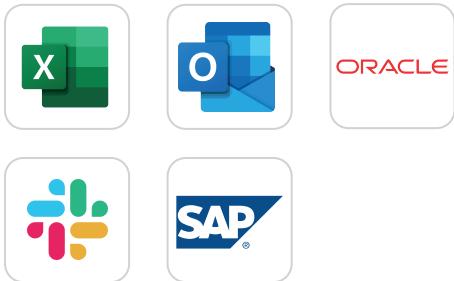
### BOT CATEGORY

Hire to Retire

### Case for Automation

Just like employee onboarding, employee separation requires various tasks to be executed by IT, accounting and security team staff members. Most of these tasks are repetitive and standard so they can easily be handed over to bots.

### AUTOMATED SOFTWARE



### Bot Activities

- Creates notifications via email and messengers to responsible teams (IT, accounting, security) on the separation with a relevant team member
- Notifies an employee on resignation tasks via email and corporate chats to provide software assets, IDs, keys, and any other corporate assets
- Creates hand-over sessions from an offboarding to an onboarding employee
- Verifies approval confirmations from all the related parties before employee official resignation
- Revokes access to corporate applications and systems
- Sends exit interview to an offboarding employee
- Sends reminders on the to-do list tasks before work commencement
- Stores employees details in relevant folders in corporate and HR systems

# 50.

## Job application processing



### BOT CATEGORY

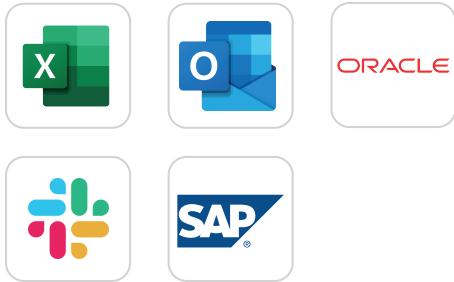
Hire to Retire

### Case for Automation

Hiring managers in many companies spend enormous amounts of time reviewing CVs/resumes and other sources of applicant data to select a subset of candidates that matches certain criteria.

A bot can not only do this job; it can also execute the necessary follow-up steps, such as scheduling interviews or requesting additional information.

### AUTOMATED SOFTWARE



### Bot Activities

- Navigates browser to apply filters and download candidate data from websites
- Extracts standard data and inputs it in Google Sheet
- Scores and ranks candidate based on predefined logic
- Creates and emails report with top candidate data to HR
- Emails candidate introduction and scheduling links

# 51. Payroll processing



## BOT CATEGORY

Hire to Retire

## AUTOMATED SOFTWARE



## Case for Automation

Payroll processing often involves reconciling data from point of sale, enterprise management, and HR software, consuming significant time and creating errors that may negatively impact your business.

Things can become even more complicated when multiple payroll calculation methods are used for different employee cohorts, creating the need for an interim payroll table.

Automation of such manual tasks is hugely beneficial to small business owners, management, accounting professionals and HR teams.

## Bot Activities

- Logs into business accounting, PoS, and HR systems to collect data  
Reconciles actual hours worked and budgeted hours
- Notifies managers of any variations (beyond threshold) by email
- Processes earning and deduction batches
- Executes tax reconciliations at the end of the quarter/year
- Generates reports on benefit deductions



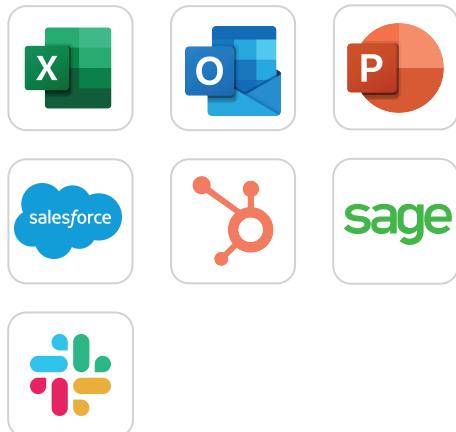
## BOT CATEGORY

Hire to Retire

## Case for Automation

In the digital era, almost everything an employee does can be evaluated for performance improvement. Management decision making improves as more function-specific data is collected from multiple no-API systems to perform an analysis. But these presentations and detailed spreadsheets are enormously time consuming to prepare manually.

## AUTOMATED SOFTWARE



## Bot Activities

- Collects data on an aspect of employee performance from marketing, sales, accounting software, or Excel spreadsheets and consolidates it into a single reporting file
- Creates basic PowerPoint presentations based on data collected
- Sends performance reports to stakeholders
- Sends HR Slack messages when employees complete self or peer evaluations
- Uploads data from performance reports to HR systems or bonus management solutions
- Creates a list of top performing employees and performs cohort analysis



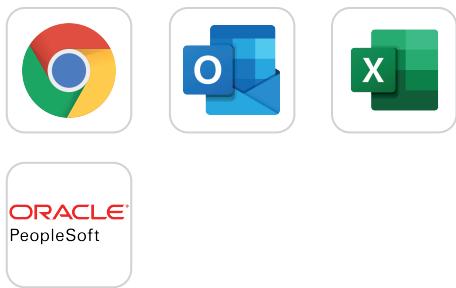
## BOT CATEGORY

Hire to Retire

## Case for Automation

With every new employee, HR and IT professionals spend significant time creating new accounts in corporate systems and services and sharing access rights. Increasing adoption of SaaS makes this process even more challenging, because its APIs are rarely designed for adding and managing new users.

## AUTOMATED SOFTWARE



## Bot Activities

- Receives email from HR with new employee profile
- Extracts data from profile template or internal HR system
- Navigates browser and logs into SaaS/Credential systems
- Creates account and sets permissions
- Emails HR a list of created accounts, permissions, and confirmations

## Market recognition

We help companies grow through RPA adoption with simple, cost-efficient, unlimited scalability.





## BOT CATEGORY

Communications

## Case for Automation

Dispute resolution is a complex process involving multiple parties. Operational routines, such as managing multiple threads, performing manual status updates, and conducting ongoing communication with a customer may incur extensive operational costs and introduce human error.

## AUTOMATED SOFTWARE



## Bot Activities

- Creates communications according to dispute-resolution protocol
- Categorizes communications based on approval/denial/escalation
- Tracks status of process resolution
- Sends email/messenger reminders to parties involved in dispute
- Creates reports on communication status

55.

## Connecting a chatbot to a job



### BOT CATEGORY

Communications

### Case for Automation

Chatbots have largely taken over the burden of initial communication with customers. However, there are still plenty of tasks where human involvement is crucial within chat communication. Human interaction is especially critical when it comes to sending company e-books, quotes or other important materials.

### AUTOMATED SOFTWARE



### Bot Activities

- Integrates with chatbot
- Takes over tasks from chatbot depending on communication scenarios
- Emails relevant e-books, quotes, or other information to customer
- Sends clarification emails to customer upon request



# Email inbox management

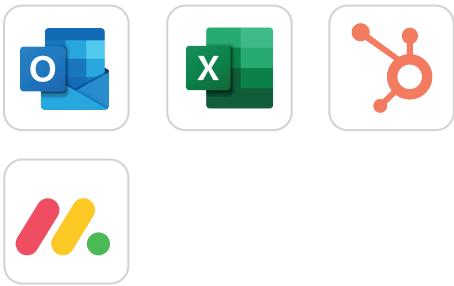
## BOT CATEGORY

Communications

## Case for Automation

Email inbox management may become laborious for team members with complex communication chains. Sales, marketing, and HR departments, for instance, may spend an inordinate amount of time sorting and labeling emails, then delegating tasks based on their content.

## AUTOMATED SOFTWARE



## Bot Activities

- Sorts inbox emails based on predefined criteria
- Routes email to relevant parties based on content
- Sends auto-replies where appropriate
- Delegates tasks from an email to an employee when needed
- Collects data on email queries and creates reports for analysis
- Sends reports to stakeholders based on email content
- Creates tasks in CRM based on email content



## Marketing ROI calculator

### BOT CATEGORY

Communications

### Case for Automation

CRM systems contain key information on marketing team activities, attracted leads, and funnel management. However, CRMs do not reflect all of the direct and indirect marketing expenses that go into calculating marketing ROI. To discern ROI, the head of marketing must gather data from multiple systems and consolidate it into a single spreadsheet.

### AUTOMATED SOFTWARE



### Bot Activities

- Collects data on marketing expenditures from accounting, marketing, and management systems
- Collects data on value of deals closed by marketing teams
- Consolidates profits and expenses into a separate spreadsheet
- Calculates ROI based on consolidated data
- Emails report to stakeholders

# 58.

## Sales call monitoring



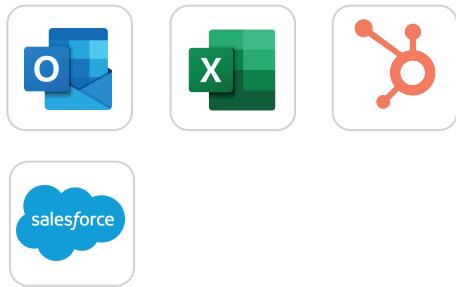
### BOT CATEGORY

Communications

### Case for Automation

Because good customer service is the foundation of a successful business, monitoring sales calls is a vital part of any sales department's operational cycle. Manual processing tasks associated with such monitoring may cost sales managers a huge amount of time that could be better spent on more analytical tasks such as sales strategy enhancement.

### AUTOMATED SOFTWARE



### Bot Activities

- Logs into CRM using relevant manager's credentials
- Finds predefined sections in CRM
- Listens to sales recordings in CRM
- Transcribes recordings into text using Google Voice
- Detects predefined "red flag" words
- Generates report upon completion of recording
- Emails Excel report to stakeholders
- Notifies stakeholders upon completion of task

# 59.

## User forum administration



### BOT CATEGORY

Communications

### Case for Automation

Forums have been around for a long time, and although they have been eclipsed by social media platforms to some extent, they still play a vital role in community building in certain fields, particularly IT. Yet forum administration can become quite onerous, as it requires the administrator to perform multiple manual tasks, such as user and post moderation, tagging, and query management.

### AUTOMATED SOFTWARE



### Bot Activities

- Categorizes user queries using tags and other specifications
- Provides users access to some forum sections according to predefined criteria
- Sends responses to standard queries addressed to admins
- Moderates forum posts by removing irrelevant content or spam
- Moderates user access to a forum
- Sets statuses and categories for users based on their forum history
- Sends emails or messenger notifications on technical issues with the forum
- Creates reports on the most common or popular topics
- Removes or bans user profiles if they do not adhere to forum guidelines

# 60.

## Helpdesk automation



### BOT CATEGORY

Communications

### AUTOMATED SOFTWARE



### Case for Automation

A helpdesk is a corporate software platform used to manage internal or external user or customer requests. Manual helpdesk ticket management can become a laborious task for your team. Automation can help you accelerate your customer service workflows by using email and messenger notifications, adding tags to tickets, incorporating varied fields into forms, and generating structured and accurate reports.

### Bot Activities

- Creates helpdesk tickets from Excel entries
- Adds tickets from helpdesk system to CRM as tasks
- Sends messenger notifications for new tickets
- Adds messages from messenger as helpdesk tasks
- Creates reports on closed helpdesk tickets
- Tags helpdesk ticket statuses in Excel spreadsheet
- Emails stakeholders reports on closed helpdesk tickets

# 61.

## Messenger communications



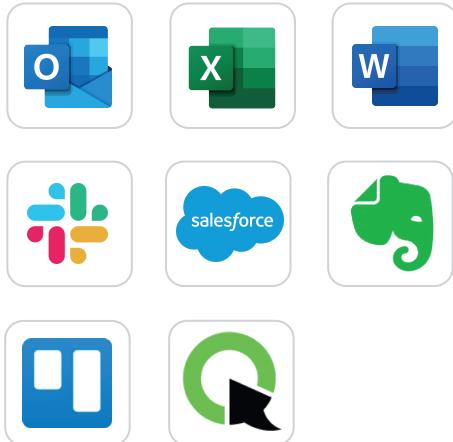
### BOT CATEGORY

Communications

### Case for Automation

Messengers are CRMs where you can manage projects, monitor leads, discuss plans and strategies, and even share work documents or media files. The higher the volume of insightful data businesses keep in messengers, the harder it is to consolidate it, especially when data has been entered manually.

### AUTOMATED SOFTWARE



### Bot Activities

- Posts Facebook messages to a webhook URL
- Sends Slack channel messages from Facebook messages
- Creates Excel rows from Facebook messages
- Sends emails from Facebook messages
- Creates notes in Evernote from Facebook messages
- Creates CRM cards from Facebook messages
- Sends direct Slack messages from incoming Facebook messages
- Sends private channel Slack messages from Facebook messages
- Creates Word documents from Facebook messages
- Sends direct messages about new webinars to your contacts on Facebook Messenger

# 62.

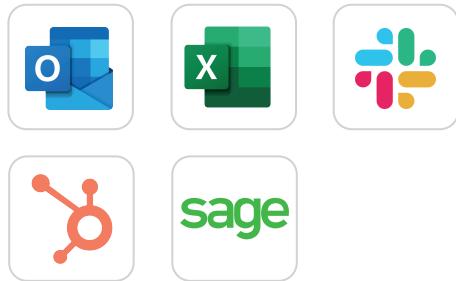
## Email data parsing



### BOT CATEGORY

Communications

### AUTOMATED SOFTWARE



### Case for Automation

Email data parsing is frequently performed in many industries, such as marketing, PR, and analytics. In fact, email data is parsed in any industry where data is exported from email messages (order confirmations, purchase orders, accounting statements, or HR documents) into Excel or a corporate system. Manual email data parsing is a labor-intensive task that requires hours of copying and pasting.

### Bot Activities

- Logs into email accounts
- Selects relevant data by keyword or predefined parameters
- Extracts relevant data and imports it into Excel spreadsheets or corporate systems
- Structures extracted data and sorts it by category
- Notifies stakeholders on email data parsing task completion
- Creates reports based on email data

# 63.

## Email address parsing



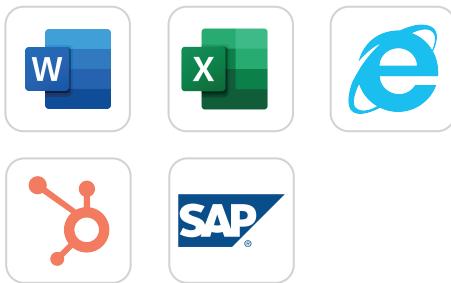
### BOT CATEGORY

Communications

### Case for Automation

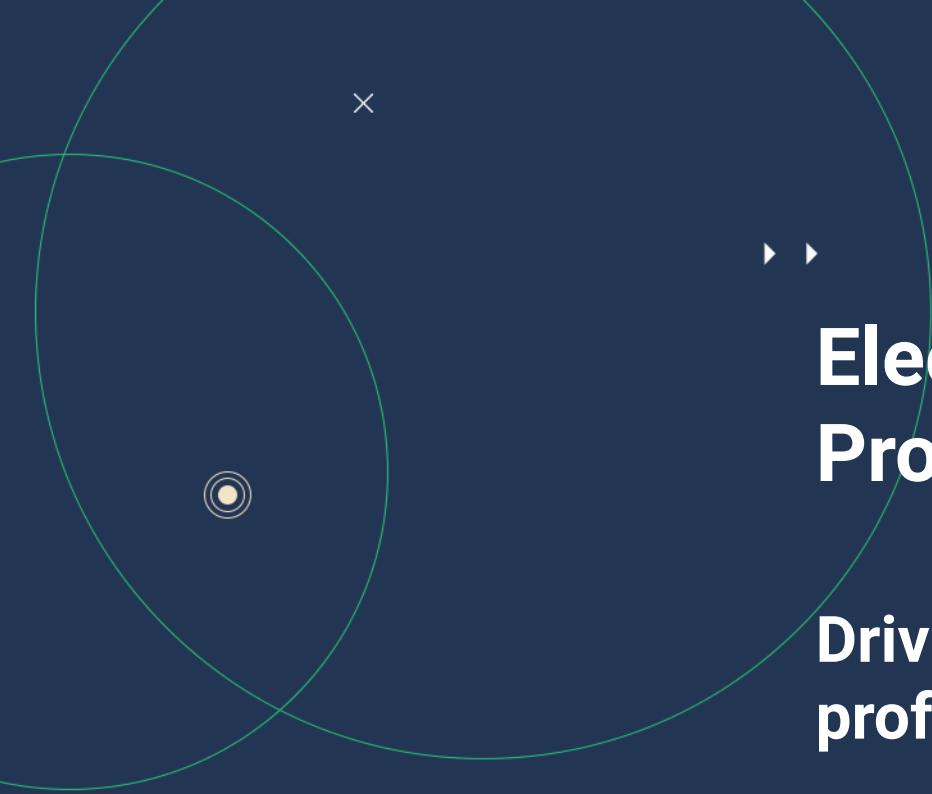
Email address parsing is commonly performed by departments such as marketing, sales, PR, and HR. Depending on the ultimate business objective—e.g., an analytical survey or a marketing campaign—teams may spend hours manually collecting email addresses or other contact details from various web sources.

### AUTOMATED SOFTWARE



### Bot Activities

- Navigates websites for relevant email addresses according to preset parameters and filters
- Extracts contact details from Google Maps, websites, and forums
- Extracts email addresses from social media platforms
- Extracts email addresses containing certain keywords
- Extracts email addresses by domain name
- Clicks website links and extracts email addresses from destination sources
- Consolidates collected email addresses into a single spreadsheet or file
- Uploads extracted email addresses into relevant internal and external sources (CRM, ERP)
- Sends extracted email addresses by email or messenger in CSV, XLS, or text formats



# ElectroNeek for Accounting Professionals

## Driving innovation for the accounting professionals

ElectroNeek is a preferred RPA vendor for the Sage Accountants Network. We also work with professional associations like AICPA and communities of interest to scale automation in accounting departments and CPA firms.

*"This partnership allows us to serve accountants and their clients in providing the best in the breed for Robotic Process Automation (RPA), allowing better data integrity and freeing up valuable time for accountants to serve their clients on advisory services, which is what they need most right now."*

Rafael Casas, Sr. Manager - Accountant Solutions, Sage



# 64.

## Printing tax returns and staging for delivery



### BOT CATEGORY

Finance and Accounting

### Case for Automation

Printing tax returns can be an extremely time-consuming office task. And despite digitization, many business units still file paper documents.

### AUTOMATED SOFTWARE



### Bot Activities

- Logs into appropriate tax software
- Finds relevant period returns
- Prints returns
- Uploads returns and vouchers to client portal
- Stages return delivery email
- Creates Excel file with list of returns printed

65.

## Tax returns filing status updates



### BOT CATEGORY

Finance and Accounting

### Case for Automation

Sending tax return filing status updates requires ongoing monitoring of returns' acceptance status, uploading acceptance confirmation into the client portal and CRM, and compiling reports on task completion. These actions involve manual, rule-based activities and may cost employees a significant amount of productive time.

### AUTOMATED SOFTWARE



### Bot Activities

- Submits form
- Creates new client in tax software
- Extracts client's details from tax form
- Enters all client's details in system
- Creates Excel file with statuses
- Compiles task completion report
- Emails report to stakeholders



66.

## Uploading data to tax software

### BOT CATEGORY

Finance and Accounting

### Case for Automation

To fill in tax forms, employees have to manually map financial data to relevant fields, which involves switching among various sources and multiple loggings into tax management software.

### AUTOMATED SOFTWARE



### Bot Activities

- Switch among systems to collect data
- Logs into the tax software
- Inputs data into the related management system
- Map financial data to the relevant fields in a tax form
- Creates reports on task completion
- Sends reminders to stakeholders by email or a messenger



## Tax data collection

### BOT CATEGORY

Finance and Accounting

### Case for Automation

It can be very challenging for employees to obtain tax data from a variety of sources such as invoices, balance sheets, and profit and loss sheets. Often such information appears in multiple formats, all of which take time to be recognized and processed.

### AUTOMATED SOFTWARE



### Bot Activities

- Extracts data from various sources (PDFs, spreadsheets) using OCR
- Sorts data accordingly
- Logs into tax software
- Switches among systems to reconcile and transfer data



## General ledger management

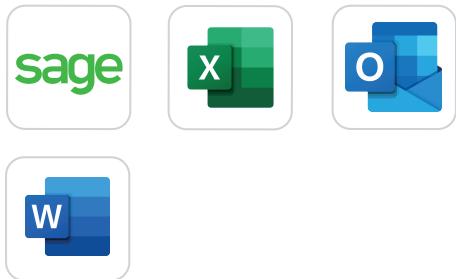
### BOT CATEGORY

Finance and Accounting

### Case for Automation

Creating entries in a general ledger may require accountants to manually enter data that is siloed in spreadsheets, scans, and multiple accounting software programs. The task is time consuming and often causes operational inefficiencies, increasing the cost of onboarding.

### AUTOMATED SOFTWARE



### Bot Activities

- Enters account data
- Reconciles data
- Updates general ledger accounts
- Creates reports on task status
- Sends reminders to stakeholders
- Notifies stakeholders of updates via messenger and email

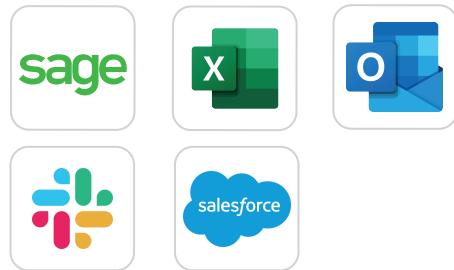


# Payment reminders

## BOT CATEGORY

Finance and Accounting

## AUTOMATED SOFTWARE



## Case for Automation

In a fast-moving business environment, every minute lost can cost you money. Hence, a basic operation such as issuing payment reminders can have a huge impact on your profit and loss, particularly for large companies with a high volume of transactions and accounts. Having your team members send payment reminders manually can cost up to 2 hours of their productive time weekly.

## Bot Activities

- Exports relevant customer details from accounting and sales systems
- Places customers' email details in separate email bodies [ED25]
- Sends customized reminders to each customer
- Sends notifications by email or messenger to the responsible manager when a reply is received
- Sends notifications by email or messenger when an email is read
- Creates consolidated reports on the reminders sent with relevant tags on status and payment

# 70.

## Annual questionnaire processing



### BOT CATEGORY

Finance and Accounting

### Case for Automation

Annual tax questionnaires contain essential information on clients' financial accounts and guarantee that tax requirements are met. Processing these questionnaires manually is time consuming and risks introducing human error. Task automation would eliminate errors and free up over 2 hours of productive time for other priority activities.

### AUTOMATED SOFTWARE



### Bot Activities

- Is triggered by client form submission
- Extracts client form details
- Enters client form details into tax software
- Saves copy of completed questionnaire to file folder
- Creates Excel file with list of questionnaires processed and their statuses
- Sends messenger or email notification once questionnaire is processed

# 74.

## Invoice generation



### BOT CATEGORY

Finance and Accounting

### Case for Automation

Invoices usually come in multiple formats (Word, PDF, a fax or a paper copy). Employees have to transfer this data manually into the corporate systems with no errors and discrepancies. For some companies invoice generation may take several days which leads to unpaid invoices or late payments and overall inefficiency.

### AUTOMATED SOFTWARE



### Bot Activities

- Recognizes data using OCR
- Logs into the accounting systems
- Inputs data into the relevant system's fields
- Registers invoices in the system
- Emails stakeholders on invoice posting



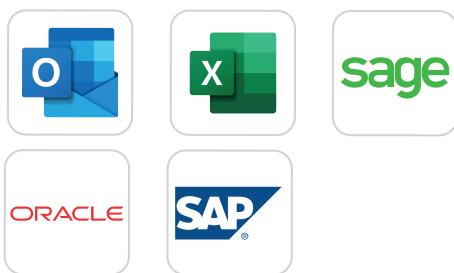
## BOT CATEGORY

Finance and Accounting

## Case for Automation

Repetitive tasks such as manual transaction matching can cost accounting team members hours of valuable work time. This is especially the case when they are using slow-performing legacy systems or encounter duplicate data.

## AUTOMATED SOFTWARE



## Bot Activities

- Detects discrepancies between a company's bank statements stored in relevant folders and bank statements supplied by the bank
- Reconciles data that appears on a company's balance sheet in a general ledger accounts system with details that form these balances in accounting systems
- Reconciles external supplier accounts
- Reconciles internal balance details
- Identifies accounts that do not match
- Creates reconciliation reports
- Emails stakeholders notifications when reconciliation tasks are complete



"What is really impressive about working with ElectroNeek is their tech team, which is constantly growing and getting better. And the products - Studio, Orchestrator - they really lead. We have worked with many RPA vendors, and with ElectroNeek we are building things that we couldn't do with any other vendor, even the biggest ones. Another huge plus is the price. You wouldn't be able to find such an affordable price anywhere nowadays."

Wilton A. Rogers III, CEO, STA Group



## Invoice reconciliation

### BOT CATEGORY

Finance and Accounting

### AUTOMATED SOFTWARE



### Case for Automation

Invoice reconciliation is a vital task in various industries, especially in accounting and finance. Yet depending on your accounting department or the size of the business it may take up to 40+ hours weekly to reconcile a bunch of invoices. It implies the extraction of all the transaction related documents, comparing the fields and numbers manually and verifying that everything is correct. Such a time-consuming process definitely needs automation which ElectroNeek would love to bring in.

### Bot Activities

- Reconciles data in suppliers statements with the data stored in the internal systems
- Reconciles data in bank statements with internat General Ledger system
- Exports the matched items to corporate accounting systems
- Creates notifications by email or in Slack upon reconciliation task is completed
- Reconciles the accuracy of the data stored in Excel spreadsheets with the primary documents' data
- Creates reports on invoice data reconciliation

73.



## Custom reporting from financial systems

### BOT CATEGORY

Finance and Accounting

### Case for Automation

Manual financial reporting is a time-consuming process which implies gathering data from multiple sources including earlier reports and unstructured data siloed in various formats. Very often it is accompanied by poor legacy systems and compartmentalization among teams.

### AUTOMATED SOFTWARE



### Bot Activities

- Recognizes data by using OCR
- Extracts data from various sources
- Consolidates data from financial systems in the structured form
- Reconciles data and reveals deviations and errors
- Emails on reports finalization

75.

## Currency updates based on exchange rates



### BOT CATEGORY

Operations

### AUTOMATED SOFTWARE



### Case for Automation

Businesses that involve money transfer services, currency exchange, travel, and shopping all need 24/7 access to the latest mid-market rates. A bot can efficiently fetch currency updates from online sources, automatically download them into Excel, and update the rates on screen. Everything is performed quickly and without the risk of human error presented by manual entry. Bots can also handle customer queries via live chat, providing historic currency graphs, live currency rates, and currency conversions.

### Bot Activities

- Extracts updated mid-market rates from predefined web sources and time frame
- Creates new Excel tabs in worksheets or updates existing currency information
- Populates data across multiple screens (or a single screen) and website
- Logs into ERP system to share updated rates across all business units
- Handles customer queries via live chat

# 76.

## Duplicate items detection



### BOT CATEGORY

Operations

### AUTOMATED SOFTWARE



### Case for Automation

Correcting duplicate records manually is an expensive and time-consuming process. Also problematic, potential duplicates may be mistakenly deleted during a manual process due to false positives introduced by spelling errors or the misinterpretation of discrete records for individuals with the same names. Automating the process can help prevent errors and facilitate active order processing.

### Bot Activities

- Analyzes data from Excel, CSV, and text files
- Identifies, highlights, and presents duplicate items according to set parameters
- Flags possible duplicate records
- Presents user preview and takes direct action



# Manufacturing order processing

## BOT CATEGORY

Operations

## AUTOMATED SOFTWARE



## Case for Automation

With the growing demand for custom and digitized solutions, order processing becomes more complex for any e-commerce business, including manufacturers. The situation is further complicated by the proliferation of digital systems, unique data, and documentation. Manual handling of order processing can quickly consume employees' productive time and dramatically impact customer satisfaction.

## Bot Activities

- Logs into corporate systems to collect relevant data
- Checks orders with regards to capacity, tools, materials, and other details
- Checks batch of documents prepared for order
- Gathers production data for corrective actions and analysis
- Monitors variances from production plan
- Closes orders and hands them over to inventory control
- Updates data on order tracking
- Validates and reconciles documents
- Emails stakeholders reports on order processing status

78.



## Multiple files characters replacement

### BOT CATEGORY

Operations

### Case for Automation

Various functions require creating duplicate content in multiple files. Among such functions are finance and accounting, marketing, sales, and other more. Making amendments to data stored in these files can be time consuming and require several hours of mundane manual work.

### AUTOMATED SOFTWARE



### Bot Activities

- Opens relevant folders and systems
- Opens relevant files in Word and Excel
- Launches 'find and replace' function
- Replaces multiple characters in any number of files



# Internal systems access management

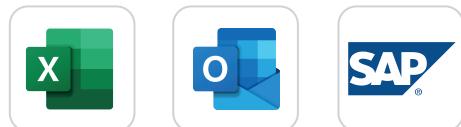
## BOT CATEGORY

Operations

## Case for Automation

Providing employees with access to relevant corporate systems, applications, and devices can become a cumbersome task. This is especially true in the case of sophisticated corporate hierarchies and large enterprises with complex access management policies.

## AUTOMATED SOFTWARE



## Bot Activities

- Receives access request via email or messenger
- Searches for employee details in preapproved list
- Finds required system and checks for access status
- Provides employee with access to required system
- Sends employee notification that access has been granted
- Creates report on each stage of access management
- Emails notifications to stakeholders upon task completion

80.

## Government website automation



### BOT CATEGORY

Operations

### AUTOMATED SOFTWARE



### Case for Automation

Many industries regularly interact with government websites, including legal, finance, tax, HR, and even sales (in the case of public procurement procedures). Interaction with government websites—which are often slow or outdated—typically involves filling out application forms, navigating specific pages, and monitoring updates, a time-consuming process that introduces the risk of human error.

### Bot Activities

- Logs into government websites with user credentials
- Uploads files to specific pages in requested format
- Uploads data from corporate systems and files into predefined government website pages
- Extracts structured and unstructured data from multiple government web pages
- Creates reports based on data extracted from government websites
- Emails stakeholders on data extracted from government websites
- Notifies stakeholders on task completion and reports created



# Website data parsing

## BOT CATEGORY

Operations

## Case for Automation

Data parsing is a significant operation in a wide range of businesses and industries. Statistics, job listings, financial information, competitive pricing and offerings, catalogs – these types of data may be useful in lots of functions from finance to HR. Manual parsing of such data is an extremely time-consuming task of a repetitive and copy-paste nature.

## AUTOMATED SOFTWARE



## Bot Activities

- Logs into the website with user credentials
- Selects necessary data for parsing on web pages
- Downloads structured data in XLSX, XLS, XML, and CSV
- Schedules scraping and collects updated data every day automatically
- Creates website parsing history reports
- Transfers parsed data into relevant systems and folders
- Extracts structured and unstructured data from multiple web pages
- Notifies stakeholders of the completion of web parsing tasks; creates and sends reports



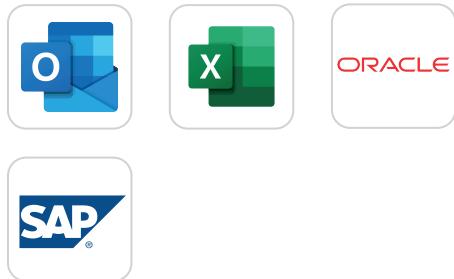
## BOT CATEGORY

Operations

## Case for Automation

Supply chains generate a huge amount of data. One of the biggest challenges of supply-chain data management is coordinating timely updates of information related to goods, destinations, drop-off points, and events across multiple sources and parties. Inaccurate data may lead to an excess or shortage of inventory as well as other problems.

## AUTOMATED SOFTWARE



## Bot Activities

- Logs into supply-management systems, spreadsheets, and files using responsible manager account credentials
- Updates data on inventory items' amount and value
- Matches data on availability of items among several supply management systems
- Executes demand plan updates
- Updates purchase order dates
- Sends notifications on updates made



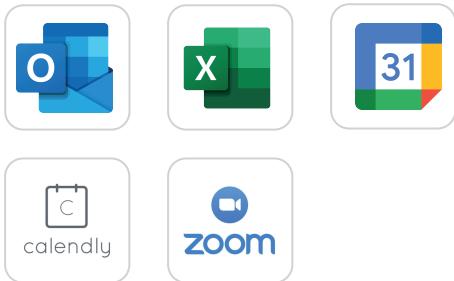
## BOT CATEGORY

Operations

## Case for Automation

Maintaining a business calendar requires excellent organizational skills. It can be especially complicated when dealing with high-level employees who have numerous meetings each day. Here, automation may come in handy by finding the best time for relevant team members to meet, thus freeing up more time for selling or other advanced tasks.

## AUTOMATED SOFTWARE



## Bot Activities

- Logs into planning systems using various account credentials
- Navigates employee and customer calendars to find time slots based on predefined criteria
- Checks availability of various business parties
- Schedules time for multiple parties to perform complex, multistep services
- Emails confirmations and calendar placeholders
- Collects data on available time slots in a single Excel file
- Creates and emails report to stakeholders upon task completion

# 84. Project management



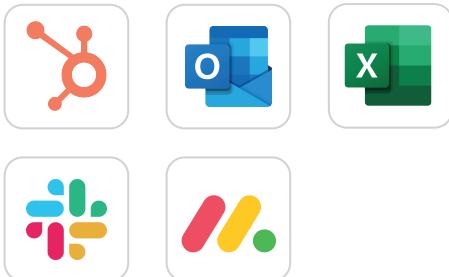
## BOT CATEGORY

Operations

## Case for Automation

Project management requires taking control over various aspects of a project's workflow, including team members' workload, task statuses, CRM updates, reporting, and many other details. Apart from being a lot for a manager to remember, these tasks alone can easily take more than 8 hours of nonstop work each day.

## AUTOMATED SOFTWARE



## Bot Activities

- Sends email or messenger notifications upon task completion
- Assigns team members to tasks in project management CRM or spreadsheet
- Schedules regular meetings with relevant team members based on events or triggers (project-stage completion or status change)
- Reminds team members when a task is not completed
- Generates reports upon entering a new project stage or completing a project
- Notifies team members when projects or tasks are completed, and need review or updates

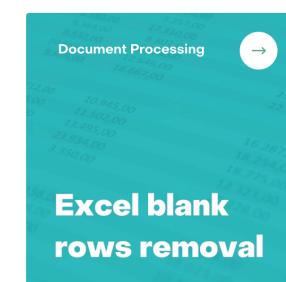
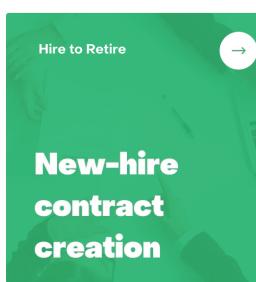
# Explore our growing Bot library online at [Electroneek.com/bots/](http://Electroneek.com/bots/)

## Bot Category

- Finance and Accounting (15)
- Software Automation (11)
- Operations (12)
- DevOps (3)
- Sales (13)
- Document Processing (11)
- Strategy and Planning (6)
- Communications (10)
- Hire to Retire (9)
- IT (7)
- Marketing (8)
- Supply Chain Management (2)

## Software

## Bot tag



85.

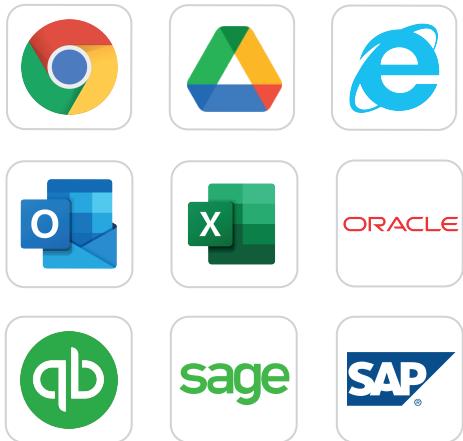
## Extracting Excel worksheets as new Excel files



### BOT CATEGORY

Document Processing

### AUTOMATED SOFTWARE



### Case for Automation

Excel has many built-in features for extracting and manipulating data, but extracting Excel tabs from one file into multiple Excel documents can become cumbersome and risk the introduction of human error. Bots can simplify this process and eliminate the risk of error. Bots can be very helpful in cases where separate Excel workbooks are required for different regions, dates, products, and clients. Bots can efficiently split each tab into its own Excel file and save it in a designated folder. They can also support various Excel file formats.

### Bot Activities

- Detects the relevant file location
- Analyzes file (input) and required output format (e.g., .xls, .xlsx)
- Creates separate workbooks and names each one according to specified criteria
- Saves resulting files to a designated folder



## Blank Excel row removal

### BOT CATEGORY

Document Processing

### AUTOMATED SOFTWARE



### Case for Automation

Blank rows in Excel spreadsheets are visually undesirable, and more importantly, an incorrectly placed blank row may inhibit built-in Excel features, as blanks are used to determine data ranges. Although it's easy enough for teams to remove a few blank rows, the problem becomes more significant when departments are working with large sets of data. A bot can efficiently remove any blank rows to give your worksheets a professional appearance and make sure they perform properly.

### Bot Activities

- Detects user-defined file path(s) and name(s) of Excel file(s)
- Opens designated Excel spreadsheets and removes blank rows
- Saves file(s) in defined folder(s)
- Emails relevant files to users

87.

## Date-and-time format change



### BOT CATEGORY

Document Processing

### Case for Automation

Employees work with many documents that have a standard date and time format. If a new format is needed, manually retyping dates and times in multiple documents is a tedious and time-consuming process. A bot can quickly perform any needed date/time changes without altering your default settings.

### AUTOMATED SOFTWARE



### Bot Activities

- Identifies document date, weekday, and time in document
- Determines difference between current and required format
- Adds/modifies existing date and time format, adding seconds, minutes, and hours as needed
- Performs operation



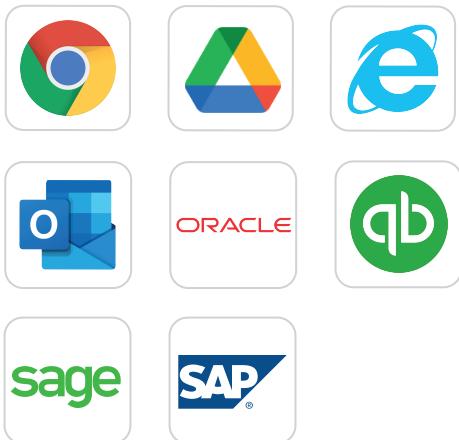
## BOT CATEGORY

Document Processing

## Case for Automation

Departments such as logistics, HR, finance, and marketing, frequently need to split large PDFs into smaller ones. This can be done manually, but it costs time and effort that could be better applied to higher-level tasks. A bot can easily split a PDF document into smaller documents to facilitate electronic distribution.

## AUTOMATED SOFTWARE



## Bot Activities

- Analyzes PDF file
- Splits file into multiple PDFs based on predefined specifications
- Names each file according to predefined file naming scheme
- Saves files to designated folder
- If required, overwrites existing files with the same titles
- Emails individual files to designated parties

# 89.

## PDF data extraction

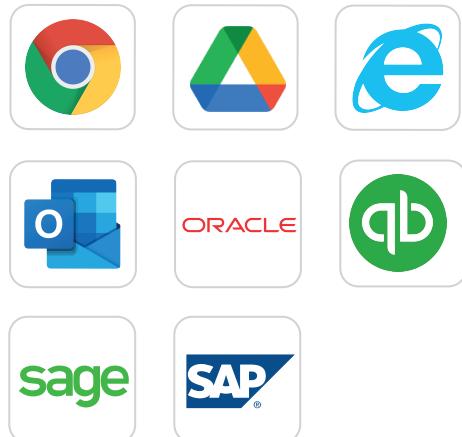


### BOT CATEGORY

Document Processing

---

### AUTOMATED SOFTWARE



### Case for Automation

PDFs can store various types of data, but manually extracting the data from them is a cumbersome process. A bot can easily extract data and export it to other formats, whether it is found in text or in an image. Automating this function can cut costs, save many hours of labor, and enhance employee productivity. Automation can be especially beneficial in cases such as data extraction from feedback forms and invoices.

### Bot Activities

- Analyzes PDF document
- Extracts fields or predefined elements from document
- Exports output, fills Excel sheet with data extracted from PDF
- Saves file to designated folder

# 90.

## XML to CSV conversion



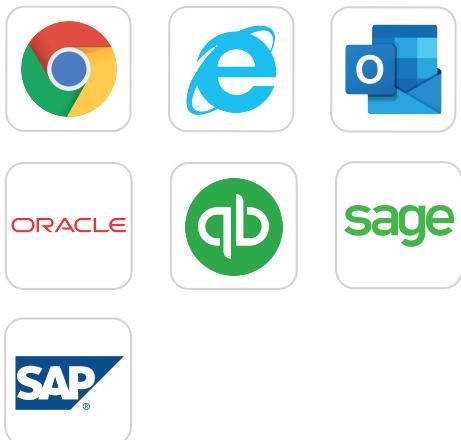
### BOT CATEGORY

Document Processing

### Case for Automation

Many legacy systems still use XML to transfer data between enterprise systems. However, XML format may not be as easily digestible as CSV and other formats that are better designed for transferring data within applications. A bot can seamlessly integrate with an existing application to convert XML to CSV, eliminating the time and effort required to convert XML to CSV by other means.

### AUTOMATED SOFTWARE



### Bot Activities

- Analyzes input folder
- Recognizes XML format and converts it to CSV format
- Saves CSV format in output folder and keeps original file name
- Skips a file if it is not an XML file



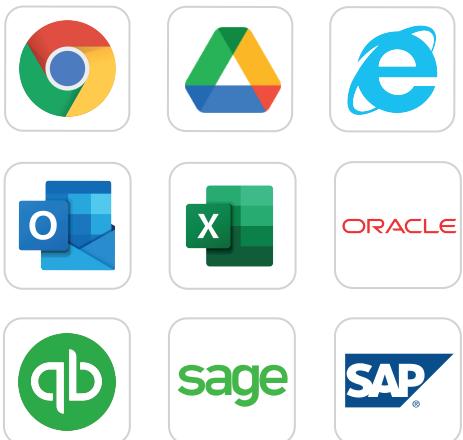
## BOT CATEGORY

Document Processing

## Case for Automation

CSV files are compact, ideal for handling, storing, and parsing data. But for data analysis and reporting, manual conversion of CSV to Excel is a cumbersome task. Creating automated workflows to convert CSV to Excel as structured, usable data can save your team many hours of manual work.

## AUTOMATED SOFTWARE



## Bot Activities

- Loads CSV file
- Recognizes relevant data from Excel spreadsheets
- Recognizes relevant data from email, web, and accounting software
- Converts CSV data into row-and-column format in Excel
- After file conversion, lets you save and open Excel spreadsheet

# 91. Order routing



## BOT CATEGORY

Document Processing

## Case for Automation

Orders often come to the wrong department before reaching the appropriate staff member or department through a forwarded email. This happens because orders come in from various sources (web forms, portals) and are not always addressed correctly. Such situations lead to delays in order execution as well as poor customer service.

## AUTOMATED SOFTWARE



## Bot Activities

- Recognizes order data based on preset criteria/order template
- Forwards orders to the correct recipients
- Notifies relevant parties [ED6] of the completion of a task

92.

## Claims processing



### BOT CATEGORY

Document Processing

### Case for Automation

Claims processing involves administrative, customer service, and managerial functions. Manual claims data entry, validation, and payment procedures may lead to errors and even loss of revenue. The situation gets even worse when it comes to legacy systems, which are typically less efficient than more modern systems.

### AUTOMATED SOFTWARE



### Bot Activities

- Recognizes data from PDFs or scans
- Reconciles and verifies claims data
- Extracts relevant data from preset fields
- Generates audit trails on claims operations
- Automates data entry into claims management system

93.



## Scanned template data extraction

### BOT CATEGORY

Document Processing

### Case for Automation

Various back-office operations require data processing from documents that come in different formats and originate from various sources. Whether they are structured or unstructured in nature, these documents can take hours to process manually.

### AUTOMATED SOFTWARE



### Bot Activities

- Recognizes data by using OCR
- Recognizes data from unstructured documents using Handl and Taiger systems
- Extracts relevant data
- Fulfils relevant systems/spreadsheets with extracted data



## Document template completion

### BOT CATEGORY

Document Processing

### Case for Automation

Completing standard forms for banking, taxes, HR, and accounting can be extremely labor intensive, especially when team members must complete tens to hundreds of such forms daily. Such data entry requires a meticulous approach and may lead to human errors.

### AUTOMATED SOFTWARE



### Bot Activities

- Places data from various sources into the relevant fields in template-based documents
- Recognizes and reconciles data between primary and target documents' fields
- Removes duplicate forms
- Emails completed documents to stakeholders



“Our goal is to reinvent Robotic Process Automation, which has historically been available only to Fortune 500 and Global 2000 companies, and democratize access to it for companies of all sizes, empowering automation entrepreneurs and IT teams across the world.”

Dmitry Karpov, CIO, ElectroNeek



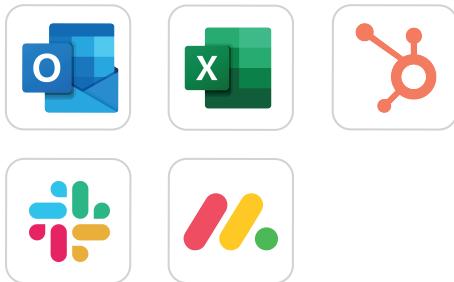
## BOT CATEGORY

Strategy & Planning

## Case for Automation

KPI monitoring is a significant part of any project management team's workflow. Manual team KPI monitoring can be a time-consuming task, consuming up to 10 hours of a management team's productive time and impacting the quality of the actual project analysis.

## AUTOMATED SOFTWARE



## Bot Activities

- Sends email/messenger notifications to responsible manager to alert them of KPI completion or incompleteness
- Collects data on team members' KPI status from corporate systems, Excel spreadsheets, and project management boards
- Creates consolidated report on KPI achievement from multiple team and project management systems
- Sends reminders to management team on KPI-monitoring dates



# Operational scheduling

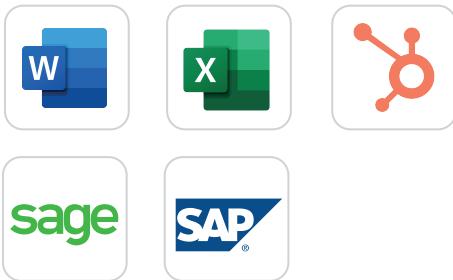
## BOT CATEGORY

Strategy & Planning

## Case for Automation

Many functions require a mix of repetitive operations and analytical tasks. The repetitive operations may be time-consuming, and scheduling them may prove helpful when a business wants to devote more time to high-level, analytical tasks.

## AUTOMATED SOFTWARE



## Bot Activities

- Logs into relevant systems with users' account credentials
- Schedules document creation and processing
- Schedules data exports and imports
- Schedules Outlook notifications for release upon completion of predefined tasks or operations
- Schedules data removal at predefined intervals

97.



## Competitor price monitoring

### BOT CATEGORY

Strategy & Planning

### Case for Automation

Researching competitors' offerings and pricing is a must for any business. But although employees may spend countless hours monitoring data, it is extremely difficult to keep up with frequently changing prices. The inevitability of human error in data entry is another area of concern.

### AUTOMATED SOFTWARE



### Bot Activities

- Scans the web for relevant product pricing
- Collects competitors' pricing and inputs data into required spreadsheet/system field
- Logs into sales systems and changes prices and statuses accordingly  
Emails stakeholders on competitors' price changes
- Adjusts your product's prices in accordance with your competitors' change in pricing



# Plan vs. Actuals updates

## BOT CATEGORY

Strategy & Planning

## Case for Automation

Organizational planning is an indispensable component of business management strategy requiring a detailed and balanced analysis of the current business situation as well as risk management. However, actual business outcomes do not always correlate with plans. Thus, teams must manually execute a labor-intensive reconciliation.

## AUTOMATED SOFTWARE



## Bot Activities

- Reconciles relevant planned metrics in a project management CRM with actual project figures in Excel or another system
- Consolidates data on planned numbers or products vs. actual ones
- Sends notifications via email or messenger on any changes in planned metrics, figures, or products
- Updates relevant management systems based on actual updates

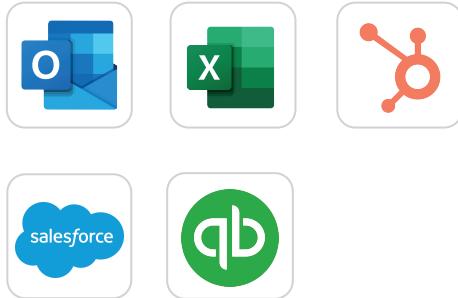
# 100. Collection of planning data



## BOT CATEGORY

Strategy & Planning

## AUTOMATED SOFTWARE



## Case for Automation

Organizational planning requires data collection from multiple teams and business units and involves almost all functions across the company – from administrative roles to executive management. The collected data must be compiled in a structured format and distributed to key stakeholders in a timely manner. In many companies, employees spend an entire day performing these rule-based tasks.

## Bot Activities

- Opens relevant folders and systems and sorts files according to requested data
- Extracts data from relevant financial, management, and administrative systems and spreadsheets
- Sorts extracted data into relevant fields and categories in the planning spreadsheet
- Marks areas where requested data has not been found and sends email follow-ups
- Emails stakeholders upon the completion of data collection



# Planning data management

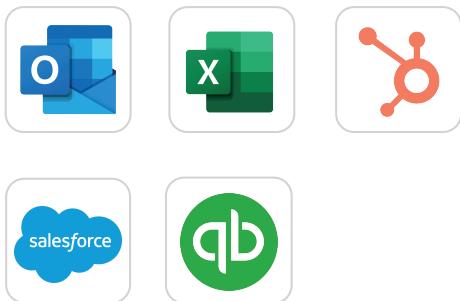
## BOT CATEGORY

Strategy & Planning

## Case for Automation

Planning data management requires a foolproof strategy for accessing, integrating, governing, storing, cleansing, and analyzing data. Manual management of such data—which comes from various corporate systems (operational, transactional, management) and in multiple formats (scans, PDFs, images, Word, and Excel files)—can adversely impact the integrity of the data.

## AUTOMATED SOFTWARE



## Bot Activities

- Opens files from corporate folders and systems
- Extracts relevant information from Excel and Word files, PDFs, and scans
- Logs into planning systems
- Creates folders and fields in planning systems and places the extracted data in relevant categories and fields
- Removes duplicate data in planning systems and spreadsheets
- Governs access to data and traces activity logs
- Emails reports to stakeholders on data imports/exports and storage status



# How to get ElectroNeek bots?



## Managed Service Providers

Customization and maintenance of RPA bots like those featured in this book have become a significant revenue stream for many MSPs that became ElectroNeek Partners. We help our partners establish and grow their RPA implementation business, offering simple RPA solutions with unlimited scalability.

[Learn more>>](#)



## IT teams

ElectroNeek's RPA Platform has been recognized by Capterra and G2 as the easiest to use, so building bots like these and achieving internal competency in RPA is possible for IT teams in companies of all sizes. On top of its intuitive no-code/low-code interface, ElectroNeek offers the most affordable RPA solutions, so your team will get the highest possible ROI from the technology.

[Learn more>>](#)



## Business users

Boost your business performance and reap all the benefits of RPA without paying for a commercial license. Contact us today to get matched with one of our partners to get started with bots without paying for any software.

[Learn more>>](#)

**Get in touch with us today!**





# Thank you!

[sales@electroneek.com](mailto:sales@electroneek.com)

+1 (650) 600-9550

[www.electroneek.com](http://www.electroneek.com)