



Homes that live in you



USER MANUAL

SPL Automation Web Portal
Powered by UiPath, SAP & SFDC

Introduction

As part of our ongoing digital transformation journey, we have successfully implemented an automation platform designed to streamline manual and recurring processes. This strategic initiative significantly enhances efficiency, control, accuracy and overall productivity across the organization.

Significantly reduces processing time, enabling quicker task completion. Minimizing manual effort allows employees to focus on higher-value activities. Ensures reliable results with reduced dependency on manual intervention. Uniform workflows lead to consistent and predictable outcomes across departments.

Web Form Application

To access the portal, Please click the link : [SPL UiPath Automation Web Portal Link.](#)

Application serves as a centralized, user-friendly platform for task submission and management. Designed with simplicity and usability in mind, it enables employees to interact with automated processes efficiently and transparently.

Key Features:

- SSO Integration: Employees can seamlessly log in using their company credentials, ensuring secure and convenient access.
- Department-Specific Navigation: Interactive tiles guide users to department-relevant automation workflows for optimal use.
- Resource Hub: The home page features demo automation videos to help users easily understand and make the most of the platform's capabilities..
- Feedback and Suggestions: Employees can submit requests for new automations, fostering continuous improvement and innovation.



Home Departments Contact

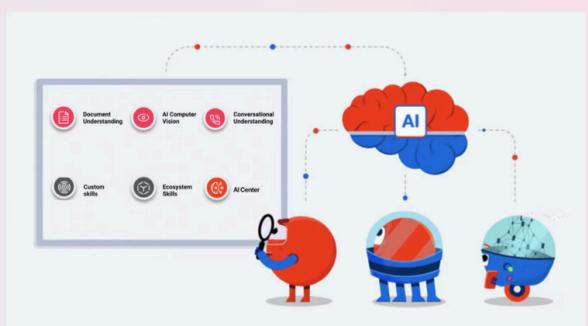
Welcome to SPL BOT!

Automating Possibilities, Anywhere, Anytime!

We specialize in automating processes across departments, saving time and boosting efficiency. Whether it's streamlining tasks, integrating systems, or enhancing workflows — we're here to help.

Unlock the future of automation with SPL BOT today!

Sample Automation Videos



Making Use of Existing Automation

Automation developed for SPL is grouped under Departments as Tiles. Users can access respective tiles by selecting department option in the main menu.

Currently automations are developed four departments: IT, Finance, Technical and Sales & Marketing . Other Departments will be added when new automations are developed for them

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Department-Wise Automation Solutions

Select a department to explore how automation can improve productivity.



IT

Improve ticket management and operations tailored for IT processes.



Finance

Click to launch the Finance automation app hosted on UiPath Cloud.



Technical

Advanced automation for document processing and backend work.



Sales & Marketing

Automate lead management and campaigns smartly Sales & Marketing.

Contact: ithelpdesk@shriramproperties.com | Location: Bangalore, India

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Finance Automation

Select a department to explore how automation can improve productivity.



MIR7

Automated and trained invoice extraction with a simple front-end for better accuracy.



Day Book Report

Automated the Day Book Report for efficient daily transaction tracking and reporting.



Trial Balance Extraction

Automated Trial Balance extraction for quick and accurate financial summaries.



SG&A Budget Swapping

SG&A budget Shifts funds between expense categories.



SG&A Budget Swapping(MIS)

SG&A budget Shifts funds between expense categories.



SG&A Budget Reduction

SG&A budget Shifts funds between expense categories.



SG&A Budget Increases Request

SG&A budget addition to overall funds allocated to expenses.



SG&A Budget Availability Report

SG&A Check Budget Availability by WBS - Department.



E-Invoice and E-Way Bill

Auto-generates and downloads E-Invoice and E-Way Bill.



F-02 Demands Entry with Tax Code

F-02 demand data Auto-post Entries in SAP including tax codes.



AM Data Entry Process

AM data entry captures asset information in SAP for accounting and management.



EPP Data Entry Process

EPP data entry records employee purchase plan details, automatically reporting them to SAP.

[User Manual](#)

Some of Automations:

Automation to view SG&A Budget in SAP

SG&A Budget Availability

Check Budget Availability by WBS (Department)

WBS Element

Region:	<input type="text" value="Select Region"/>	Company Code:	<input type="text" value="Select Company Code"/>
Plant Code:	<input type="text" value="Select Plant Code"/>	Department:	<input type="text" value="Select Company Code"/>
WBS Code:	<input type="text" value="WBS Code"/>		

Submit

Instruction

- The Department Budget Increase Request form is designed to help departments clearly outline and justify their need for additional funding.
- Departments provide essential details, including the current budget, requested increase, and specific reasons for the need, such as project expansion, staffing, or equipment upgrades.
- The form includes a breakdown of expected expenses in categories like staffing and technology, ensuring transparency in funding allocation.
- Departments describe anticipated outcomes, emphasizing the value and impact of the request.

Automation to create communication user in SAP

File Uploader

Drop file to upload here

Upload

Instruction

- Please click the 'Upload' button on the right to upload the Communication User Creation Template (Excel file). Refer to the sample template provided for guidance — ensure that the column names in your file exactly match those in the sample.

Sl no.	Emp id	Name	DEPT	DOJ (DD/MM/YY)	Email id	Mobile no.
1	102108	Ravi Ranjan	SALES	01.04.2024	raviranjan@shriramproperties.com	9731916625
2	102109	M R Gopinath	CRM	01.04.2024	gopinath.mr@shriramproperties.com	8072106587

- The Bot validates the uploaded file, checking that all required fields are filled correctly.
- If validation passes, the Bot creates communication users in SAP.
- The Bot provides a status report, indicating the success or failure of each user creation attempt.

Lead Assignment Automation in SFDC

Leads - Data assignment for Presales

Leads - Data assignment for Presales.

Assignment Type:	<input type="text" value="Select Assignment Type"/>	Region:	<input type="text" value="Select The Region"/>
Owners Email ID:	<input type="text" value="Select Owners Email ID"/>	Project Names:	<input type="text" value="Select Project Name"/>

Submit

Instruction

- **Assignment Type Selection:** Choose either CPPS or VDNB assignment type based on your project requirements.
- **Region Configuration:** Select the appropriate region from the available options.
- **Project Selection:** Based on the selected region, only the projects belonging to that region will be automatically populated in the dropdown list. You can then select one or more project names, or use the search functionality to quickly locate specific projects.
- **Email Notification Setup:** Select one or more email addresses of the individuals to whom the data needs to be assigned. The corresponding Owner ID will be displayed in the Owner ID field for verification.
- **Owner ID Management:** The Owner ID field is automatically populated by the system and remains non-editable to ensure data integrity.
- **Report Generation:** Click Submit to process the assignment and generate a comprehensive report. A confirmation email with processing details and completion status will be sent to the user who filled out the form.

Access and Permissions

Most of the automations are accessible for all the users, were as some have restricted access. If any user need access for the specific tiles which is restricted, kindly contact IT team.

Automation to Open/Close Income Tax Declaration Period in success factor

Open/Close Income Tax Declaration Period

Open/Close Income Tax Declaration Period refers to enabling or disabling the timeframe during which employees can submit their income tax declarations.

IT declaration (Actual/Proposed) *

From Date *

To Date *

Instruction

Welcome to the Income Tax Duration Change Automation Page! Use the UIPATH BOT to easily update the Actual/Proposal duration by following the simple steps below.

Enter Information: On the left side of the page, you will find fields where you need to enter the required details. Please provide the relevant information change.

Ids are filled in, click on the Submit automation BOT to begin processing

Take the necessary updates in information provided.

Confirmation: Once the changes are successfully implemented, the BOT will send a confirmation email to the requester (i.e., HR).

Information
Dear Manikandan V, this form is only accessible to authorized users. Please reach out if you need assistance!

Interested to Know More How Automation Works ?

Click on “Sample Automation Videos” button in the home page to know how the automation bot functions, offering a clear and practical overview of the automation process.



[Home](#)
[Departments](#)
[Contact](#)

Sample Automation Process Video

To explore how automation works.



E-INVOICE



MIR7

Interested in Automating your Day to Day Tasks?

Please click on “**Unlock the future of automation using SPLBOT Today**” button in the home page and fill out the request form. Our team will review it, discuss your requirements in detail, and take it forward accordingly.

You can automate tasks across platforms like SAP, SFDC, Success Factor, web applications, Excel and many more.

Processes that involve repetitive steps, require significant manual effort or follow predictable loops are ideal candidates for automation.

Process Automation Request

Transform your process with SPL BOT—fill in the form to begin your automation journey.

Hi Hariharan Subramanian,

Thank you for choosing to embrace automation!

- With the power of our automation bot, you can streamline and simplify long-term, repetitive, and time-consuming processes—whether they occur daily, monthly, or as part of your routine workflows.
- You can automate tasks across platforms like SAP, web applications, Excel, Salesforce (SFDC), and many more.
- Processes that involve repetitive steps, require significant manual effort, or follow predictable loops are ideal candidates for automation.

Let's make your work smarter, faster, and more efficient!

Department Name *

Process Name *

Process Description *

Purpose and Benefits of Automation *

Submit

Conclusion

Thank you for using the Web Form Application reference manual, please feel to reach for any queries, support and new automation requests.