



Introduction to Zoho RPA

What is RPA?

Robotic Process Automation (RPA) is a software technology that automates business processes by deploying software robots to mimic human-like interactions on applications. RPA bots can interact with any application or system based on its user interface (UI) elements and can perform any action a human would typically do, all around the clock, faster and error-free.

RPA bots can work seamlessly with a wide range of applications, both modern and legacy systems. This enables them to bridge gaps in workflows, connect disparate systems, and perform end-to-end processes. RPA primarily targets processes that are manual, repetitive, rule-based, and have a low exception rate. For example, it can open and close applications, fill forms, create invoices, copy and move files, perform calculations, extract data, and much more. Automating these mundane tasks allows employees to focus on more creative and strategic work.

Why do businesses need RPA?

Imagine a medium sized ecommerce retailer specializing in electronics. With the rapid growth of their online store and increasing customer demand, their back-office operations have become a logistical nightmare. The company receives thousands of online orders daily, and each order requires manual entry into their systems. Not only is this labor-intensive, but it's also error-prone, leading to shipping mistakes, delayed deliveries, and frustrated customers. Keeping track of their vast inventory is also becoming increasingly complex. Fluctuations in demand, seasonal trends, and supply chain disruptions make it hard to maintain optimal stock levels. Often, goods are overstocked in some locations while running out in others. Their customer service team is overwhelmed with repetitive inquiries like order status checks and return requests. Agents spend more time answering routine questions than addressing complex issues, impacting the quality of service. The company's financial and reporting processes involve extensive manual data entry. This leads to inaccuracies, discrepancies, and wasted time in reconciling financial records.

Implementing RPA can address this company's challenges:

1. Automated Order Processing:

RPA bots can be deployed to process incoming orders automatically. They extract order details from emails and web forms, verify the information, and update the company's systems. This reduces errors, speeds up order fulfillment, and enhances customer satisfaction.

2. Real-time Inventory Management:

RPA can continuously monitor stock levels, update records, and even trigger automatic reorder requests when inventory reaches predefined thresholds. This ensures that products are consistently available and prevents overstock or stockouts.

3. Enhanced Customer Service:

With RPA-powered chatbots and virtual assistants, the company can automate responses to common customer inquiries, such as order status checks or return requests. Human agents can then focus on resolving more complex issues, improving overall customer service quality.

4. Error-Free Data Entry:

RPA eliminates the need for manual data entry in financial processes. Bots can extract data from invoices, receipts, and other documents, ensuring accuracy and reducing the risk of discrepancies.

RPA is not just for the retail industry. It can be used to automate a wide range of business processes in a variety of industries, including healthcare, finance, and manufacturing. RPA is a powerful tool that can help businesses of all sizes to improve efficiency, reduce costs, and improve customer satisfaction.

Examples of Popular Use Cases

Target Process Type	Use Case Example
Manual	<p>Data Entry and Extraction: Manual data entry and data processing, such as extracting invoice data from emails and legacy systems</p> <p>Lead Generation: Lead enrichment requires manually extracting information from various sources. RPA bots can extract data from various sources, such as websites, social media, and other online platforms, and enter them into the CRM system.</p> <p>Customer Support Queries: Support processes require manual responses to queries and data retrieval. RPA can automate responses to email queries, including password and login information renewal, and modifying order details like delivery address or credit card information.</p>
Repetitive	<p>Employee Onboarding: Onboarding involves repetitive processes like filling out paperwork, creating user accounts, and setting up assets. Bots can automate the process by adding users to people management systems, raise requests to create user mail accounts and also raise asset requests for employees.</p> <p>Backups: Backups are important for any organization. Taking manual data backups is a tedious, time-consuming, repetitive task that involves copying data from one system to another. Bots can automate scheduling backups,</p>

	<p>downloading backups, sending backup status notifications, and alerting administrators if errors occur.</p> <p>Travel booking: Travel booking is a repetitive task that involves booking flights, hotels, and rental cars for business travel. RPA can automate travel booking tasks by searching for the best deals on flights, hotels, and rental cars, and book them automatically.</p>
Rule - based	<p>Loan processing: This process is labor-intensive, requiring loan officers to review and verify loan documents, conduct credit checks, and handle loan disbursement. RPA bots can automate loan processing by extracting data from loan applications that are on the system, checking credit scores, and approving loans based on predefined rules and policies.</p> <p>Claim processing: An adjuster reviews and verifies insurance claims, investigates them, determines coverage, and authorizes payments. Bots can automate the process by extracting data from claim forms that are submitted to a system, verify it against predefined rules and policies, and adjudicate claims.</p> <p>Contract management: Contract management involves a contract manager manually reviewing, drafting, and negotiating contracts, tracking milestones and deadlines, and managing contract renewals. RPA bots can extract data from contracts that are on the system, track key milestones and deadlines, and trigger alerts for contract renewals or termination.</p>
Low Exception Rate	<p>Payroll processing: This involves processing employee payroll information, including calculating hours worked, verifying deductions, and processing payments. Bots can automate this process by extracting data from HR systems, calculate payroll amounts, verify deductions, and generate pay-checks. As most employees have a fixed salary or hourly wage, the calculations are straightforward and the process has a low exception rate.</p> <p>Credit card Application: Processing Credit card applications require review by an underwriter who assesses the applicant's creditworthiness to approve or deny the application. RPA bots can automate the process by collecting and verifying customer information, checking credit scores and approve or deny applications.</p> <p>Travel expense management: Travel expense management has a low exception rate because most travel expenses follow a standard format, and the reimbursement process is usually straightforward. RPA can automate these tasks by extracting data from expense reports, tracking expenses, and processing reimbursements.</p>

Key benefits of RPA implementation

Businesses of all sizes can benefit from RPA. Key benefits include:

- **Increased efficiency and productivity:** RPA bots can automate manual, repetitive tasks, freeing up employees to focus on more creative and strategic work.
- **Reduced costs:** RPA can help businesses to reduce costs by automating tasks that are currently performed by humans. This can lead to significant savings on labor costs, as well as other costs associated with manual processes, such as errors and rework.
- **Improved accuracy:** RPA bots can perform tasks with a high degree of accuracy, reducing the risk of errors. This can lead to improved customer satisfaction and reduced costs associated with errors.
- **Faster turnaround times:** RPA bots can automate tasks much faster than humans can, leading to faster turnaround times for processes. This can improve customer satisfaction and give businesses a competitive advantage.
- **Improved security:** RPA can help businesses to improve security by automating tasks that involve sensitive data. This can reduce the risk of data breaches and other security incidents.

What is Zoho RPA?

Zoho RPA is a **Robotic Process Automation** platform that supercharges your workflow automation and advances your automation journey. It seamlessly links cloud apps with legacy systems, even those lacking APIs, automating manual and repetitive tasks to free up your employees for strategic initiatives.

Flows are an essential part of the platform. They are like processes or workflows that you can use to automate tasks. A flow is made up of a trigger and one or more actions. The trigger initiates the flow, and the actions are the tasks that are executed by the flow. For example, you could create a flow that runs everyday to collect data from your inventory application, create an Excel spreadsheet, and email the spreadsheet to you.

With this no-code platform, you can automate tasks without writing any code. Simply drag and drop actions to create your flows.

What can Zoho RPA do?

Windows App Automation

Zoho RPA offers Windows automation, which means you can automate your Windows applications. For example, the bot can make clicks, type in text, or extract text from Windows, executing tasks with unparalleled precision and speed. [Learn more](#)

Web Automation

Zoho RPA offers web automation which means you would be able to automate tasks on the web browsers. By capturing your interactions – clicks, text inputs, and more – RPA converts them into a sequence of actions in your workflows. [Learn more](#)

Microsoft Excel Automation

Zoho RPA offers a wide set of actions for Excel. You can seamlessly read data from worksheets, input data, or even create new sheets. The most compelling aspect is its ability to transfer this data to cloud applications effortlessly, minimizing the need for manual data input. [Learn more](#)

Files and Folders Automation

The Files and Folders category in Zoho RPA allows you to organise and effortlessly manage your data. You can automate tasks like creating folders, copying/moving files or folders, getting files from a folder, and more. [Learn more](#)

Powerful RPA Recorder

Zoho RPA comes with a powerful recorder for Windows and web. It records your interactions with the systems, such as click, set text, and so on, and converts them to actions, to create flows for you, without you having to drag and drop the tasks, allowing you to create flows more quickly. You can also easily edit the actions or remove them and re-record the steps, if required. [Learn more](#)

Integrate with Cloud Apps

The platform offers support for integration with more than 800 Cloud applications. [Learn more](#)

RPA Flow Triggers

The flows can be triggered based off a webhook call from a third-party service, scheduled to run at a particular time or period, or it can be based off a desktop event. There are number of desktop trigger options available, including hot key and Windows process trigger, which let you trigger a flow with a hot key or wait for a Windows process to begin or end. We also have file and folder triggers, which let you start a flow when something happens to a file or folder, such as when it is created. [Learn more](#)

Custom Functions with Deluge

You can write your own business logic using custom functions in our proprietary language, Deluge. [Learn more](#)