

SOLUTION BRIEF



## AI-Powered Insights and Automation

- ✓ **One Centralized Platform:** Unframe delivers end-to-end solutions and workflows for ultimate flexibility. The Blueprint Approach enables fully customized solutions ready to use in hours.
- ✓ **Search Everything:** Query Salesforce data in natural language and get answers instantly in your chosen format: text, BI visualizations, reports, dashboards.
- ✓ **Integrate with Anything:** Turnkey integration of diverse data sources, systems and files (structured or unstructured) for complete data coverage beyond your Salesforce instance.
- ✓ **Unified Data Access:** Respect underlying permissions and access controls so each user only has access to the data accessible and most relevant to them.
- ✓ **Automated Summaries & Reports:** Keep sales teams efficient. Ask AI-powered questions about Salesforce data, summarize client meeting notes, and receive AI-generated reports on accounts and opportunities directly in Slack or Microsoft Teams.
- ✓ **Enable Salesforce Extension:** Use the Unframe solution directly within the Salesforce User Interface. Deploy in minutes with zero data sharing outside your environment.

### Flexible Data Integration Options

**Data Storage:** Enables real-time querying with SOSL & SOQL while merging data across sources, with options for periodic sync via local data cloning or a maintained vector index.

**SaaS or On-prem?** Both options are supported. Unframe adapts to your existing Salesforce environment, supporting all standard and custom objects.

### Customer Story

A global cybersecurity leader struggled with bottlenecks in Sales Analyst workflows and a lack of automation for repetitive tasks. By integrating Unframe's AI-native solution, sales teams now use AI to query Salesforce in natural language directly within Slack, instantly accessing Salesforce data and seamlessly merging insights from multiple sources, including Google Calendar, Snowflake, and Seismic LMS. AI-powered meeting summaries, proactive deal coaching, and automated workflows streamlined operations. Unframe's solution ensured full compatibility with their Salesforce setup, including custom objects, without any data leaving their environment.