Getting Started

v2.0

© 2020 Decisions on Demand, Inc. - All Rights Reserved

Table of Contents

Introduction

This document is intended to provide a hands-on introduction to the Decisions on Demand AppExchange app.

What is Decisions on Demand?

Decisions on Demand is a Salesforce AppExchange application that makes it easy to automate business decisions – ranging from common CRM functions like Lead and Case Assignment, Account Rating, and Territory Assignment to industry-specific business decisions such as order and quote validation, eligibility determination, underwriting and claims processing.

Use cases

Decisions on Demand lets you implement sophisticated business logic within Salesforce without coding or complex configuration.

Typical use cases include:

1. **Lead Assignment**

© 2020 Decisions on Demand, Inc. - All Rights Reserved

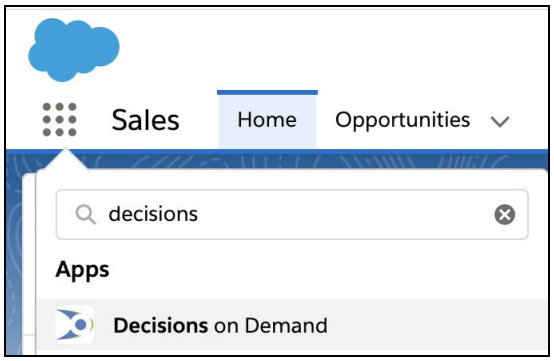
    - **Inbound Leads** -- determine the SDR or AE who should be assigned to work a lead when it is created in Salesforce
    - **Lead to Account matching** -- route a lead to the owner of a matching existing account, based on criteria such as company name, email domain and country.
    - **Reassignment** -- assign a lead to a new owner if the previously assigned rep does not follow up in time
2. **Account Assignment** - distribute prospects and existing customer accounts among the sales team based on territory definitions, segment or other criteria
    - **Team Assignment** -- assign a Sales Engineer, Alliance Manager or CSM in addition to the account owner
3. **Opportunity Split assignment** -- determine opportunity splits (including overlays) based on account team, geo and products
4. **Lead and Account Scoring** -- correlate engagement scores coming from your marketing automation tool with sales team activity captured in Salesforce

Pre-Requisites

In order to use the Decisions on Demand application in your Salesforce organization, a Salesforce Administrator first must install the app from our AppExchange listing.

Your Salesforce System Administrator should make sure that your user has the “Decisions on Demand Administor” Permission Set applied so you can complete the tasks in this Tutorial.

The application will be available from the App Launcher at the top left of Salesforce when using Lightning. Find and select the “Decisions on Demand” application:



In Classic the app can be found in the Application List on the top right. This tutorial will assume you are using Lightning -- but the product works for Classic as well.

If you encounter issues, please contact support@decisionsondemand.com or reach out to your Salesforce administrator for troubleshooting assistance.

© 2020 Decisions on Demand, Inc. - All Rights Reserved

Tutorial

This tutorial provides a hands-on introduction to writing and invoking assignment rules with Decisions on Demand.

The tutorial will cover:

1. Creating a new lead assignment business policy
2. Implementing assignment rules in a simple, non-technical format
3. Testing the rules
4. Deploying the business policy
5. Invoking the business policy using a button
6. Viewing detailed execution records
7. Updating the rules to add new conditions

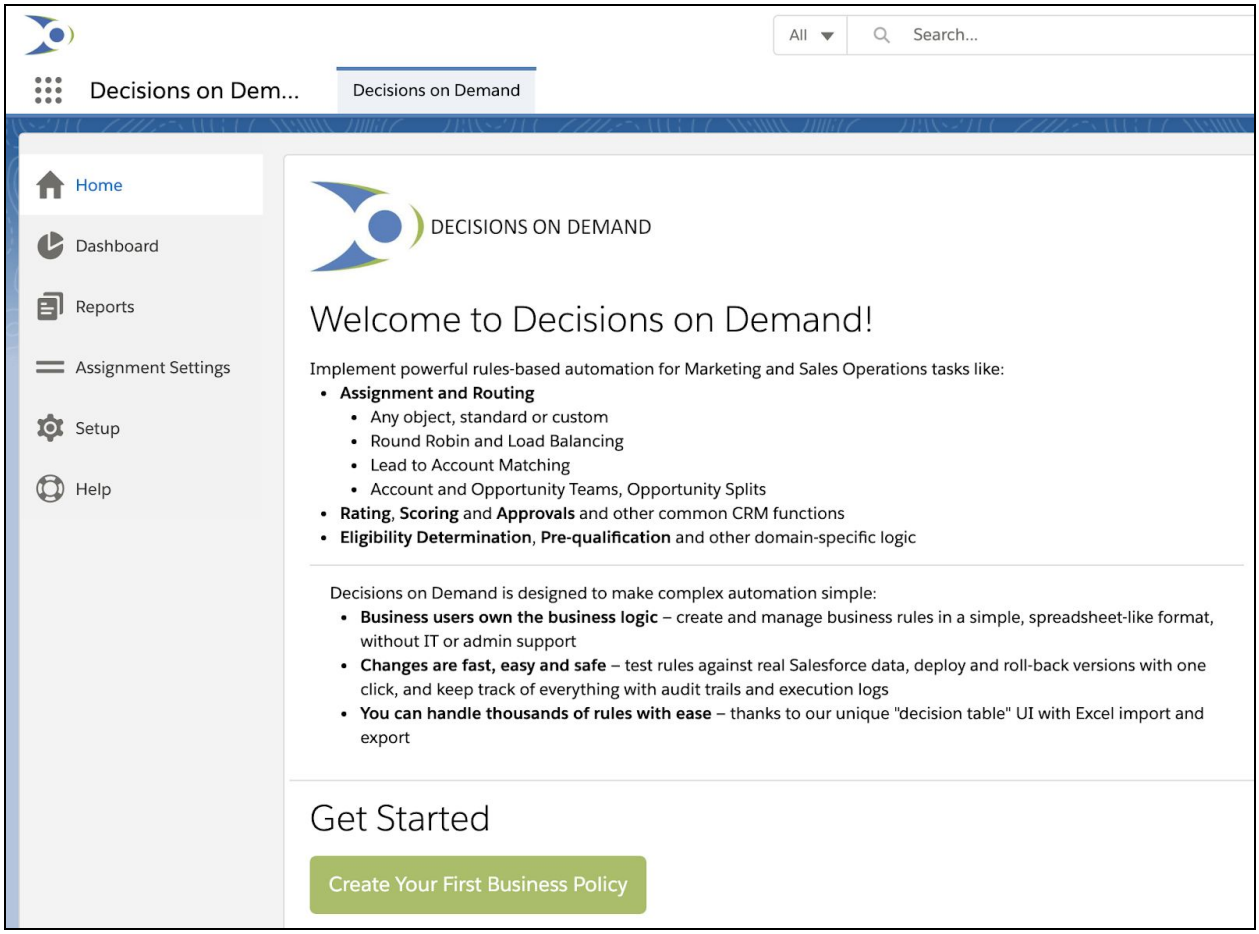
> A **business policy** is a set of business rules that together implement a repeatable business decision -- such as the assignment of an owner for inbound leads

Creating a New Lead Assignment Business Policy

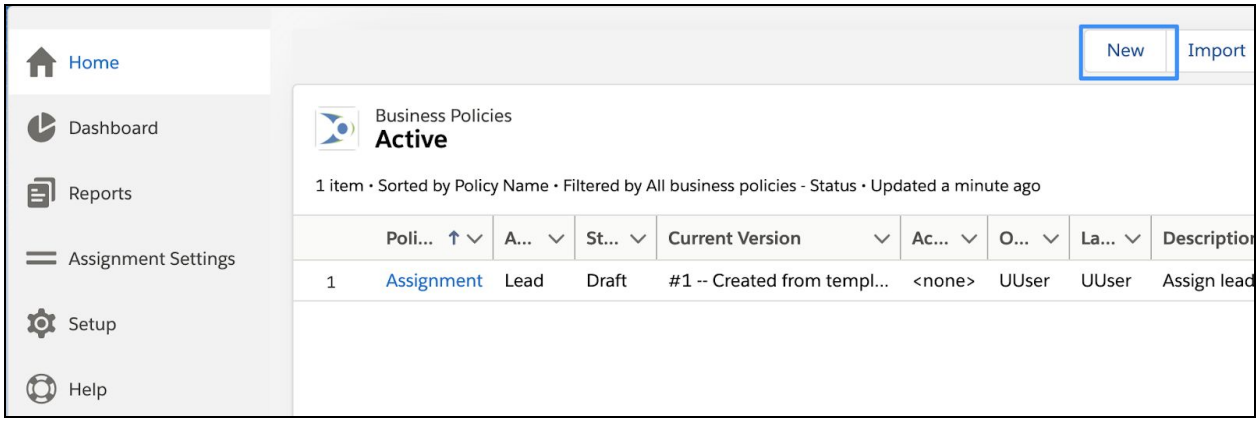
To create a new Lead Assignment policy:

1. Go to the “Decisions on Demand” application from the App Launcher, and select Home from the side tabs.
2. If you are opening the app for the first time you will see a Welcome screen. Click the “Create Your First Business Policy” button to open the New Policy wizard

© 2020 Decisions on Demand, Inc. - All Rights Reserved

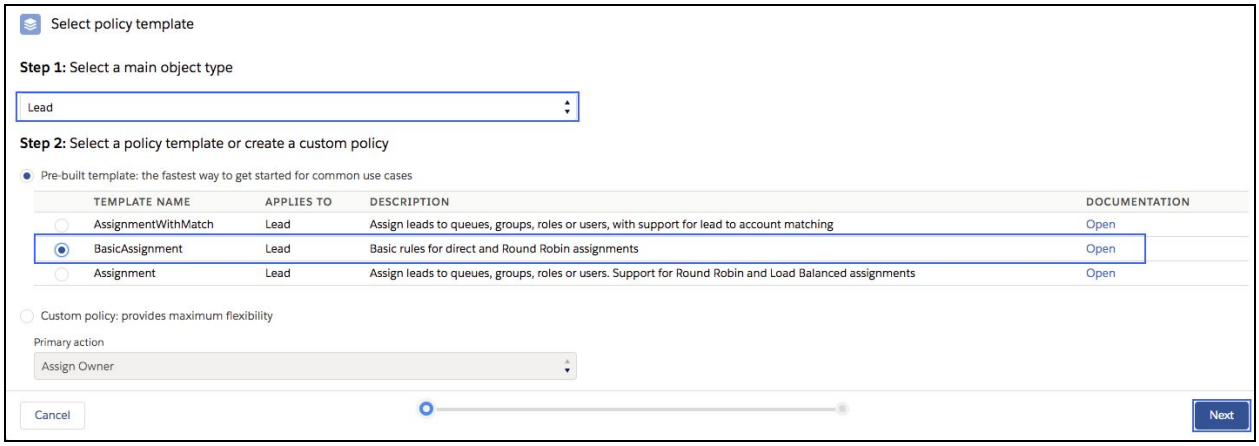


If you have used the app before you will see a screen like the one below. In this case, click the New button at the top right to open the New Policy wizard.



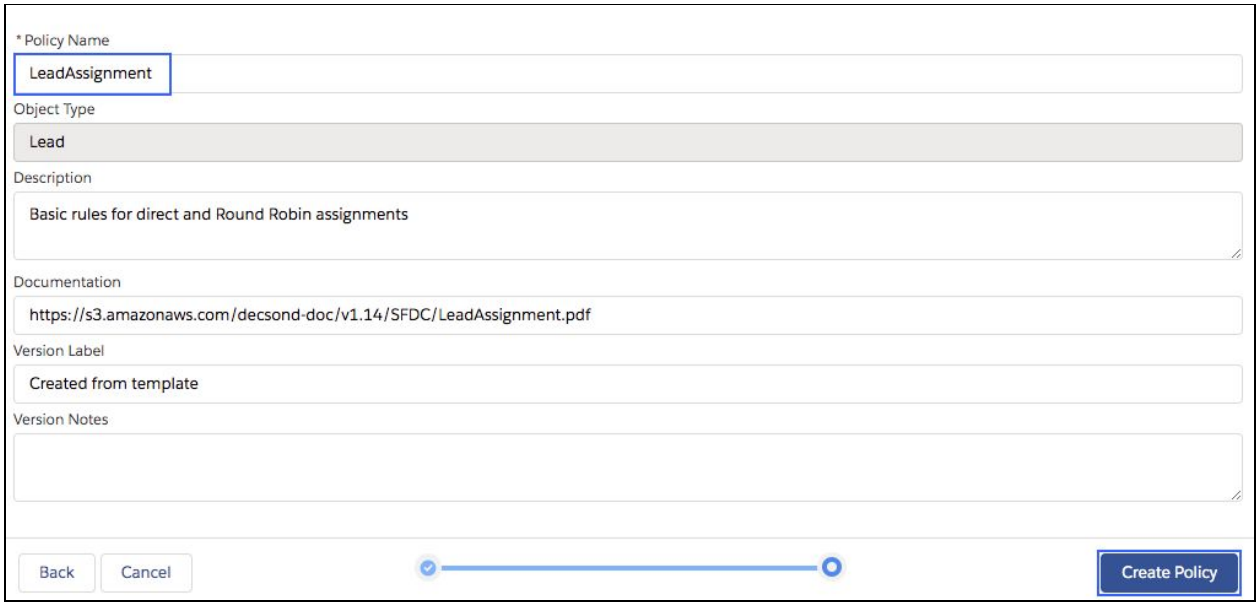
3. In the first step, select the Lead object from the dropdown. Then select the BasicAssignment option under “Template Name” from the second step. Click the Next button.

© 2020 Decisions on Demand, Inc. - All Rights Reserved



Note: Decisions on Demand provides a library of business policy templates for various standard objects that let you quickly implement assignment and other rules for your organization.

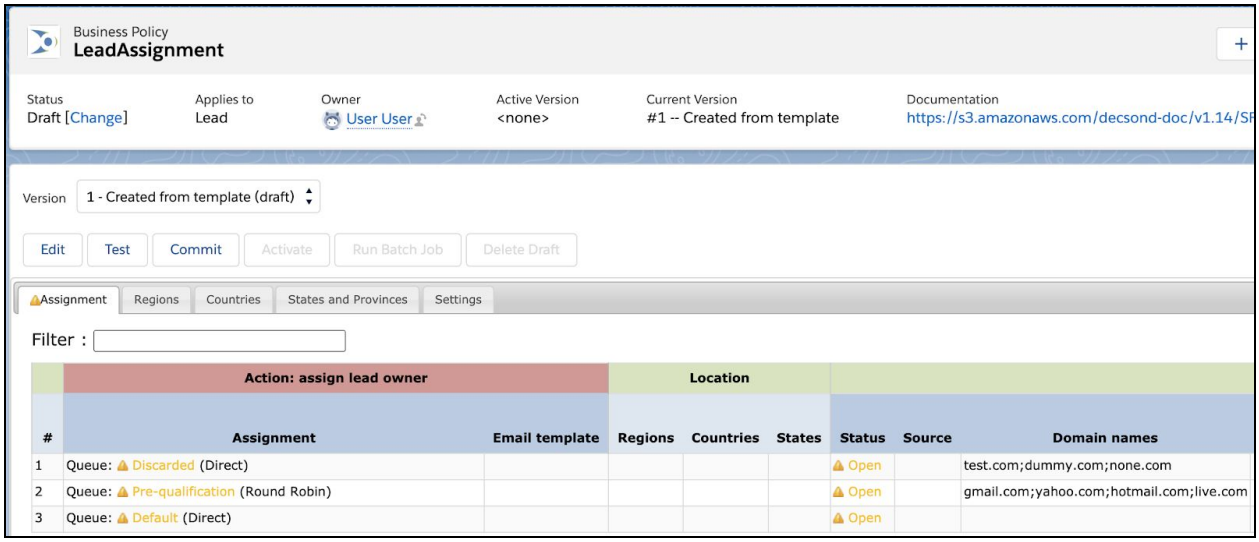
4. Provide a name for your Policy and leave the other default information as is.



5. When complete, click the **Create Policy** button.

You will be returned to the detail page for the newly created policy:

© 2020 Decisions on Demand, Inc. - All Rights Reserved



Implementing Lead Assignment Rules

In this section we will see how to create rules, starting with an example that assigns leads from smaller companies on the West Coast of the United States to a queue named ‘US Bay Area SMB’.

> This tutorial refers to 4 sample Queues named ‘Default’, ‘Discarded’, ‘US Bay Area SMB’, and ‘US Bay Area Mid Size’. To follow the tutorial you can do one of the following:
> - Create these four Queues and assign users to them in your Salesforce Organization
> - Substitute existing Queues for these four Queues in the steps below
> - Assign Leads to named users instead of Queues

Understanding the policy template

A **Business Policy** contains one or more tabs, referred to as **Decision Tables**. Each table may contain one or more rows, each of which corresponds to a **Business Rule**. Each tab is evaluated in sequence based on activation priority in descending order. The Business Rules are evaluated from the top of the table downward. If the processing type is ‘single match’ then evaluation of the Business Rules stops when a match is found. If the processing type is ‘multi match’ then the whole Decision Table is evaluated.

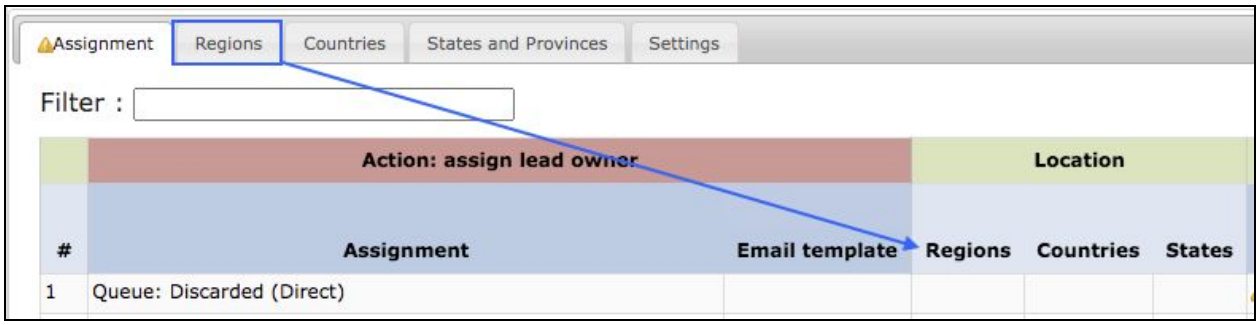
In this tutorial we will focus on the `Assignment` table, which contains the main assignment rules.

A typical decision table contains one or more actions, and one or more conditions. Action sections are shown with a red header.

© 2020 Decisions on Demand, Inc. - All Rights Reserved

Note: Cells highlighted in orange denote invalid values -- typically references to records (such as Queues or Users) or picklist values that do not exist. Invalid cells will not keep the policy from functioning, but will likely cause incorrect behavior at the individual row level. Hovering over the orange triangle will show a list of invalid values and the rows they are on.

The condition sections are shown with a green header. Conditions can refer to any fields on the lead object -- the template contains a typical sample of columns but columns can be added or removed, as described later in this guide. Conditions may also refer to values computed in another table. For instance, the `Regions` column in the `Assignment` table checks the Regions as computed in the `Regions` decision table.



A rule applies when all of the conditions on the row are met. For instance, the following row from the Regions table will set the region to `US Silicon Valley` if the Country of the lead is `United States` and the area code of the phone number is one of `650`, `408`, `415` or `669`.

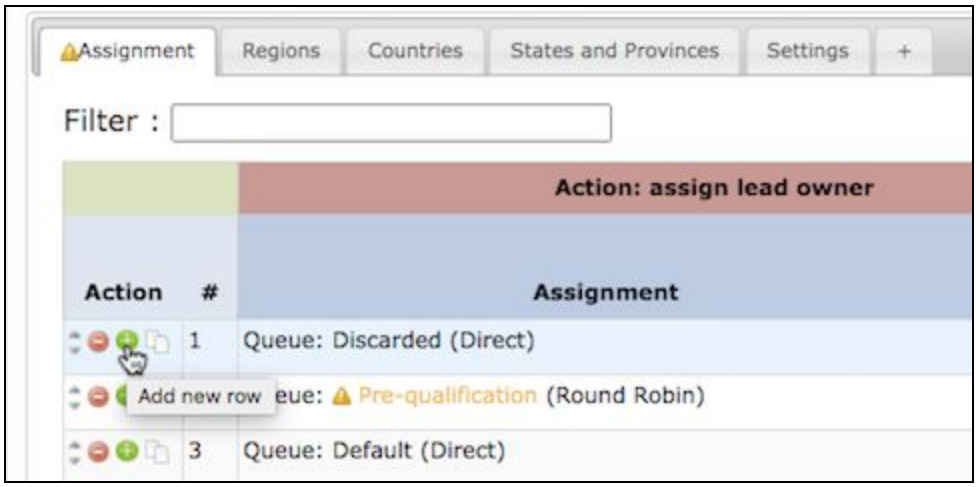
© 2020 Decisions on Demand, Inc. - All Rights Reserved

Create a New Assignment Rule

For this tutorial, we'll create a rule that assigns all Leads from small and midsize companies in the Silicon Valley region to a dedicated queue.

To create a new rule:

1. On the Business Policy detail page, click the Edit button located above the table
2. Click the green **+** (`Add new row`) button in the `Action` column at row 1. This creates a new row below into which you can enter the appropriate actions and conditions.



3. Click in the `Assignment` column.
4. Set `Assignment Type` to 'Queue' and 'US Bay Area SMB'
5. Set `Assignment Mode` to 'Round Robin'.
6. Click outside the pop-up to close it.
7. In the column `Regions`, choose the 'US Silicon Valley' option from the dropdown.
8. In the `Annual Revenue ($)` columns, enter '0' for the Lower value and '25000000' ($25,000,000) for the Upper value.
9. Remove the 'Open' value from the `Status` column
10. Now create another rule by clicking the green **+** button on the row you just created.
11. Set `Assignment Type` to 'Queue' and 'US Bay Area Mid Size'

© 2020 Decisions on Demand, Inc. - All Rights Reserved

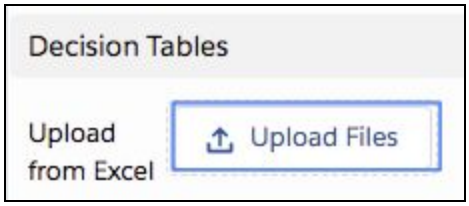
12. Set `Assignment Mode` to ‘Round Robin’.
13. Click outside the pop-up to close it.
14. In the column `Regions`, choose the ‘US Silicon Valley’ option from the dropdown.
15. In the `Annual Revenue ($)` columns, enter ‘25000001’ ($25,000,001) for the Lower value and ‘50000000’ ($50,000,000) for the Upper value.
16. Click the **Save Draft** button in the bottom right corner.

> Note: You can specify at most one one User, Queue, Public Group or Role per row, as leads can only have one owner.
>
> However you can have multiple rows with different conditions assign to the same owner -- which creates an OR condition

For bulk edits it may be more convenient to edit rules in Excel – you can download the decision tables in Excel format using the Download the most recent Excel link on the first page of the editor wizard:

or from the **download** link in the Version History,

and then upload a modified version using the **Upload Files** button or drop files.



© 2020 Decisions on Demand, Inc. - All Rights Reserved

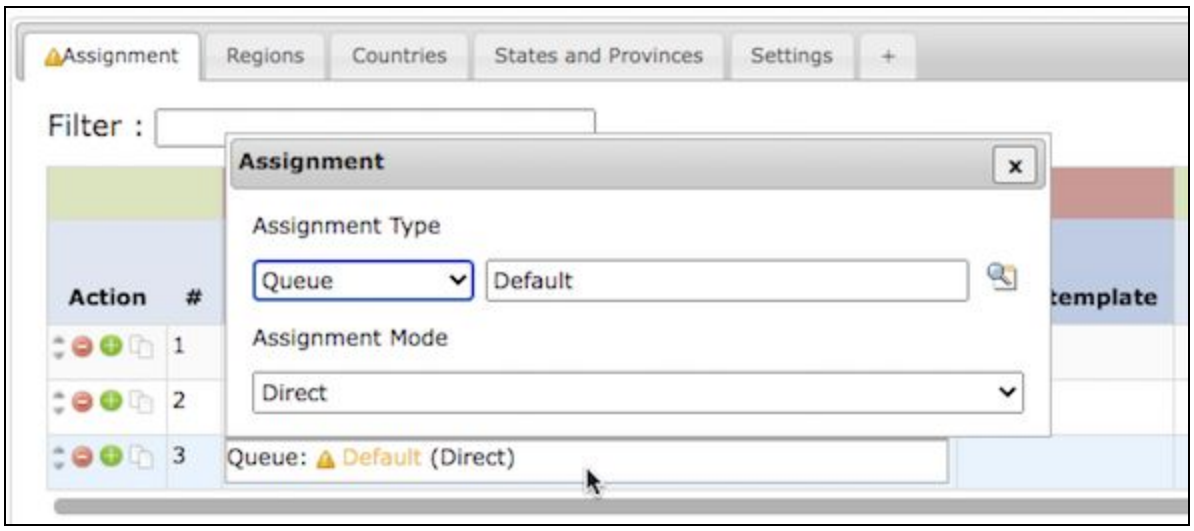
Configure handling for unassigned leads

Your lead assignment policy should normally have a ‘catch-all’ rule without any conditions, to ensure that leads always receive an assignment. This rule should be last in the table, so that it only applies if no other rules are matched.

The template we are working with uses `Default` as the queue for the catch-all rule. If the queue name is highlighted in orange, this indicates that the queue does not exist in your org. You can either create a `Default` queue or edit this rule to use a queue or user that exists in your Salesforce org.

To edit this rule to use an existing queue:

1. Click on the cell in the Assignment column that corresponds to the Default Queue.
2. Select ‘Queue’ and then the **lookup** icon on the left of the pop-up window to open the lookup dialog.
3. Type in the name of the queue you want to use.
4. Click the **Ok** button.
5. Set Assignment Mode to ‘Direct’.
6. Remove any other criteria. For example, `Status`
7. Click the **Save Draft** button in the bottom right corner.



After selecting a valid queue the warning disappears.

Fix any remaining validation warnings

Either create the missing queues and picklist values, or select valid records or values from your Salesforce organization. Before proceeding, the warning icon on the Assignment tab should disappear.

© 2020 Decisions on Demand, Inc. - All Rights Reserved

Click the **Next** button at the top right or bottom right to save a draft copy of the rules and move to the Test Console. During the save the rules will be validated and you will be asked to fix any data format or structural issues before proceeding.

Testing the rules

Before deploying the rules to the production environment it is important to test them. The Test Console allows you to validate your rules, using records from your Salesforce organization, without applying the actions, in this case assigning the Leads, to the records.

To find your test Leads in the Test Console more easily, we recommend adding a Lead List View with filter criteria to display the Leads. Follow this article for instructions on creating a List View. You can also use the 'Search this list…' search bar on the right side of the List View to narrow down the list.

To test your rules:

1. Create Leads that should meet the criteria for the rules
   See below for details.
2. In the Test Console, first select the Lead List View and then select the lead(s) you created to test your rule.

3. Click the **Run Test** button. The "Test Results" table appears below.

Test Result

NAME	STATUS	ACTIONS
Jennifer Johnson	OK	Assign Lead Jennifer Johnson to Bobby Malone (member of queue US Bay Area SMB)
Thom Thompson	FAIL	Action AssignOwner failed: Could not assign owner for Lead [Thom Thompson]: No eligible user found in group US_Bay_Area_Mid_Size

In this example, one of the Leads failed the test because there aren't any users in the 'US Bay Area Mid Size' Queue. Adding users to the Queue will resolve the issue.

For more details about the actions applied or the failures for each Lead, click the View link. To learn more about testing rules, please refer to this article.

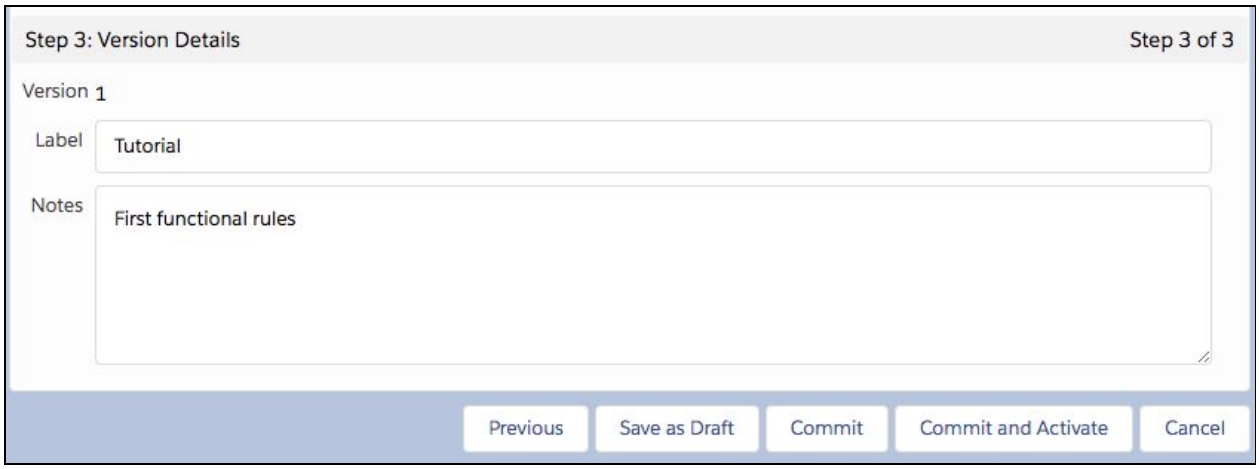
© 2020 Decisions on Demand, Inc. - All Rights Reserved

Deploying and Activating the Business Policy

Once everything is working as expected for the leads you tested, you can commit and deploy the policy to use for invocation.

To do so:

1. Click **Next** from the top right of the Test Console.
2. Update the `Label` and `Notes` fields



3. For the purpose of this Tutorial click **Commit and Activate**.
    - **Commit and Activate**: save the new policy version to the server for immediate use.
    - **Save as Draft**: save the rules but keep the policy version editable. This option is recommended if the rules are not complete and you anticipate further short term changes.
    - **Commit**: save the rules and freeze the content of the policy version. This option is recommended if the rules are complete but should not go into effect until a later date/time.
4. At the top of the Business Policy page, you will see the `Status` says 'Active' rather than 'Draft' and the `Active Version` has changed from '<none>' to '#1 -- Tutorial'.

Invoking the Business Policy

Now that the policy is active, create a button on the Lead that will make it possible to invoke the policy you created on the Lead itself.

> Note: The Salesforce User Permission 'Customize Application' is needed to perform these steps. See your Salesforce Administrator if you do not have that permission

© 2020 Decisions on Demand, Inc. - All Rights Reserved

To create a custom Detail Page Button:

1. In the top right corner of Salesforce, click the Salesforce cogwheel and select **Setup**.
2. Under the 'Platform Tools' section, expand Objects and Fields > Object Manager. Select **Lead**.
3. From the left sidebar, select **Buttons, Links, and Actions**.
4. Click **New Button or Link**.
5. Follow the instructions here to create a Detail Page Button and add it to the Lead Detail Page.
6. Now go to one of the Leads you created earlier in the Tutorial and click the button that you just created.

To verify that all is working as desired check the Policy Execution Record that was created. You can do that by going to the Business Policy detail page and checking the Execution Records. You can also add the Policy Execution Log Related List to the Lead record. For more details, see this support article.

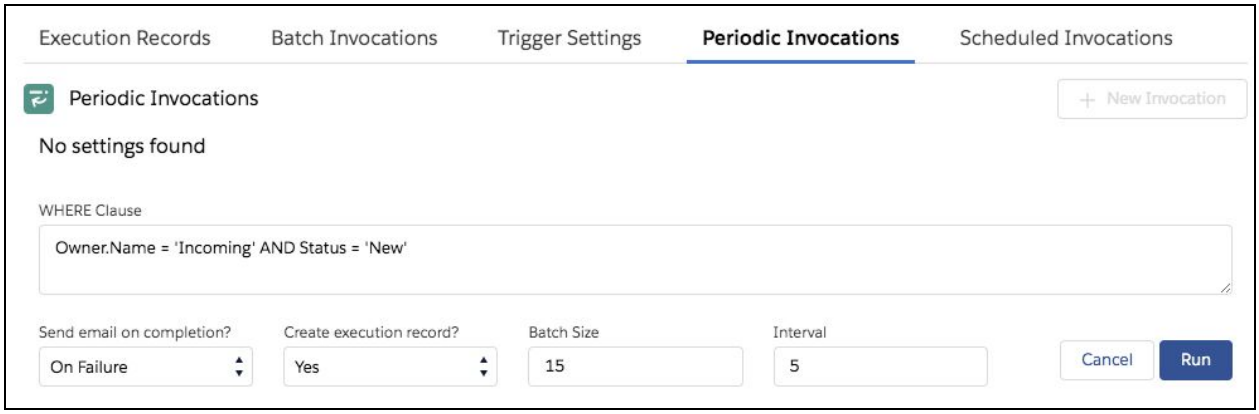
Other Invocation Options

Now that you know how to create a button to invoke a business policy, there are several other ways you can invoke a business policy, including:

- On a regular schedule
- Based on a trigger
- Via a manual batch job

See these support articles for a complete overview.

All of the invocation methods, with the exceptions of the buttons, allow for a WHERE Clause that can limit the records that are evaluated by the Decisions on Demand Business Policy to only the records of interest. Using this Tutorial as an example, if you only want to route new leads every 5 minutes that are in the 'Incoming' Queue then set up a Periodic Invocation to assign your Leads every 5 minutes with a WHERE clause of `Owner.Name = 'Incoming' AND Status = 'New'`.



© 2020 Decisions on Demand, Inc. - All Rights Reserved

Next Steps

After you've successfully created a business policy, there are many more actions available to you. The Decisions on Demand Helpdesk contains many articles to help you solve other problems. You will find online help on all the pages of the app, as well as documentation links on the Welcome tab of the Decisions on Demand app.

Below, we've provided some common next steps after creating a basic business policy:

- Add or change condition fields on the policy.
- Update a field at the same time a record is assigned.
- Assign records to fields other than the Record.OwnerId.
- Take working hours and absences into account during assignment.

More Help
For any additional questions, you can also reach us at the following:

- E-mail: support@decisionsondemand.com
- Twitter: @decsond

Creating Leads for Testing

Once you've created the rules, you can now create leads to specifically test the assignment rules. We'll create two leads that are in the "US Silicon Valley" region that meet the criteria for the two rules that we created.

To create Leads for testing:

1. Go to the Leads Tab.
2. Click the **New** button.
3. For the first lead, enter the following information and then click **Save**:
    - Name: Jennifer Johnson
    - Company: SMB
    - Lead Status: New (or whatever is appropriate for your Salesforce Organization for new Leads.)
    - Phone Number: 650-555-1234
    - Annual Revenue: 10,000,000
    - Country: United States
    - Any other fields that are required for your Salesforce Lead creation process.
4. For the second lead, enter the following information and then click **Save**:
    - Name: Thom Thompson
    - Company: Midsize

© 2020 Decisions on Demand, Inc. - All Rights Reserved

    - Lead Status: New (or whatever is appropriate for your Salesforce Organization for new Leads.)
    - Phone Number: 408-555-1234
    - Annual Revenue: 45,000,000
    - Country: United States
    - Any other fields that are required for your Salesforce Lead creation process.
5. Continue with testing.

© 2020 Decisions on Demand, Inc. - All Rights Reserved