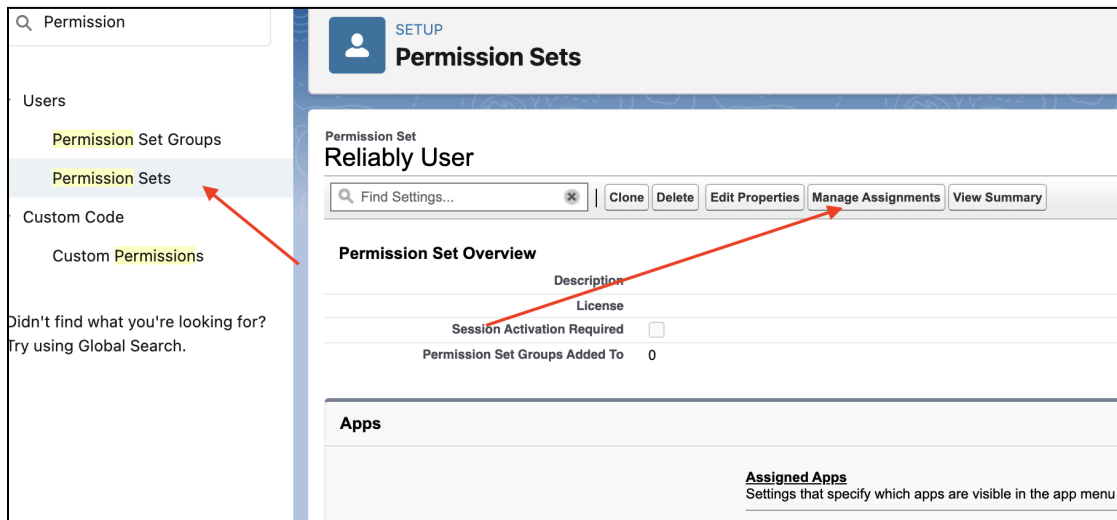


Reliably Package User Tutorial

Package Set Up

1. Assign the Permission set “Reliably User” to the user to get access to package components, custom objects, and the “Reliably” App.



2. Schedule an Observation Job
 - a. Go to Setup - Scheduled Jobs -> Schedule Apex
 - b. Name: **Observation Job**
 - c. Apex Class: **ObservationScheduledBatch**
 - d. Schedule Using: **Cron Expression**
 - e. Use this Cron Expression: `0 0 * * * ?`

First run of the job will be at the start of the next hour. After that, it will run every 15 minutes to cover all possible Observation Job start times.

Schedule Apex

[Help for this Page](#) ?

Schedule an Apex class that implements the Schedulable interface to be automatically executed on a specified interval.

Save Cancel

Job Name

Apex Class 

Schedule Using ☐ Schedule Builder ☒ Cron Expression

Cron Expression

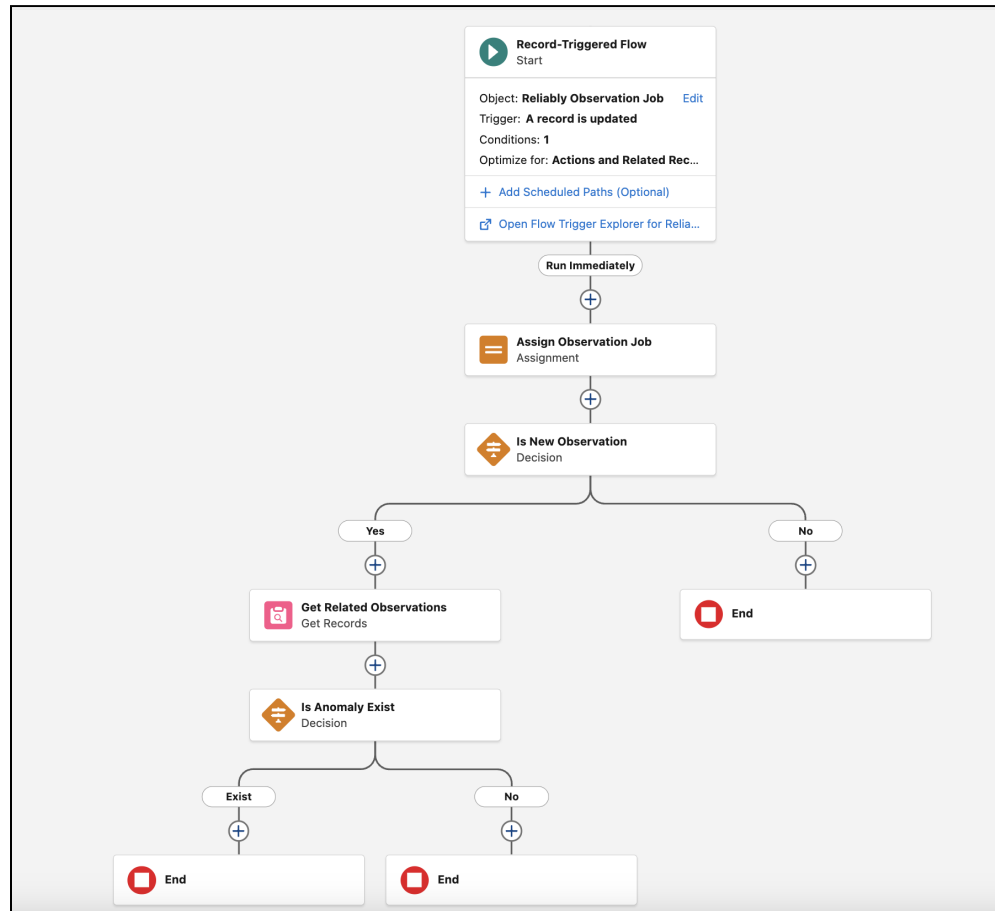
Exact start time will depend on job queue activity.

Save Cancel

3. Now, you should be able to schedule a job to observe your object.

1. Create a flow for anomaly notification:

- a. Create a new flow using the “Reliably - Anomaly Notification Template” flow. This flow filters historical anomalies and filters group anomalies to skip ones related to the same Observation Job and with the same Observation Datetime.
- b. **You do this by opening the existing Anomaly Notification Template and clicking Save As a New Flow.**



- c. Add any notification you need after the “is Anomaly Exist” element with the Exist branch.

4. Go to the “Reliably” App -> “Reliably Home” tab and Schedule an Observation Job.
- a. Fill out the Name and Description for your job

Schedule Observation Job

Description Provide a clear and descriptive name for the Observation Job, along with an optional description. This information helps identify the job's purpose and makes it easier to manage and locate in the future.

Name

Description

Back Next

- b. Select an Object, and set a record's conditions that will be observed. If you want to group by the result, you can select a field. (Note, you can select a parent field for conditions and the “Group By” option)

Schedule Observation Job

Object and Conditions Select the Salesforce Object to monitor and specify the query conditions and logic. These filters determine which records will be included in the Observation Job based on defined criteria.

Object

Group By

Condition Requirements

Field Operator Value

Back Next

Daily Testing Idea with threshold: status contains kev... idea Threshold CreatedDate

- c. Define a frequency for your Observation Job:
- 15 minutes - you can define a start and end time for the job, as well as weekdays, when it will run
 - 30 minutes - you can define a start and end time for the job, as well as weekdays, when it will run
 - Hourly - you can define a start and end time for the job, as well as weekdays, when it will run
 - Daily - you can define a start time for the job, as well as weekdays, when it will run

- v. Weekly - you can define a start time for the job, as well as weekday, when it will run
- vi. Monthly - you can define a start time and a day of the month when the job will run.
- d. If the Observee Timeframe is selected, only records where this field falls within the timeframe specified in the Frequency setting will be considered. If not, the current data snapshot will be observed, without filtering by timeframe
- e. If you want to create observations for already existing records, select a Historical Observations Start Date. (it is able, only if the Observee Timeframe is selected)

Schedule Observation Job

Frequency Define when the job will run to collect observation data. If the Observee Timeframe is selected, only records where this field falls within the timeframe specified in the Frequency setting will be considered. If not, the current data snapshot will be observed, without filtering by timeframe.

Frequency
Weekly

Observee Timeframe Field ⓘ
Q Search Timeframe Field...

Start time
12:00 AM ⓘ

Weekday
Sunday

Historical Observations Start Date ⓘ
[Empty field with calendar icon]

Back Next

- f. Define a Job Type and set an anomaly deviation value:
 - i. Comparison - The job identifies anomalies by comparing the current observation value to the average value from the selected timeframe
 - ii. Threshold - The job flags anomalies when the observation value meets the specified condition.
- g. If Job Type is Comparison, you will need to pick a Comparison Option, which defines to which past observations the new one will be compared.
(Note that observations will start to flag as anomalies only if all necessary observations are present. The Comparison Options and the Timeframe fields define "necessary" observations. So, if the Timeframe is "Last 4 runs" and the Comparison Option is "Compare job run to the same day, weekly", the observations will start to flag as anomalies only if observations for the last 4 weeks on the same weekday exist.)
- h. In the case of a Comparison Job, you will need to define a Timeframe. Timeframe defines the number of last observations that will be counted during anomaly calculation.
- i. You can select the Observee Calculation Field - it is a Number, Currency or Percent field. If field is selected - anomalies will be calculated, based on it and function, selected in the Observee Calculation Function field. If it is empty - job will calculate record count.
- j. For Comparison Job, you are also able to check "Ignore Anomalies" option and then - job will not include anomaly observations in calculations.

Schedule Observation Job

Job Type Select the Job Type and determine Anomaly Deviation:

- **Threshold** - The job flags anomalies when the observation value meets the specified condition.
- **Comparison** - The job identifies anomalies by comparing the current observation value to the average value from the selected timeframe

Job Type [?]

Comparison

Anomaly Deviation Value Type

Absolute Value

Anomaly Deviation Value [?] [Help me calculate](#)

Enter Anomaly Deviation Value

Comparison Options [?]

Compare job run to the same day, weekly

Timeframe [?]

Last 4 Runs

Observee Calculation Function [?]

SUM

Observee Calculation Field [?]

Q

☐ Ignore Anomalies

Note that observations will start to flag as anomalies only if there is observation data captured for the timeframe to compare to. Example: If the Timeframe is "Last 4 runs" and the Comparison Option is "Compare job run to the same day, weekly", the observations will start to flag as anomalies only if observations for the last 4 weeks on the same weekday exist.

[Back](#) [Submit](#)

Schedule Observation Job

Job Type Select the Job Type and determine Anomaly Deviation:

- **Threshold** - The job flags anomalies when the observation value meets the specified condition.
- **Comparison** - The job identifies anomalies by comparing the current observation value to the average value from the selected timeframe

Job Type [?]

Threshold

Operator

Equals

Value [?] [Help me calculate](#)

Enter threshold

Observee Calculation Field

Q

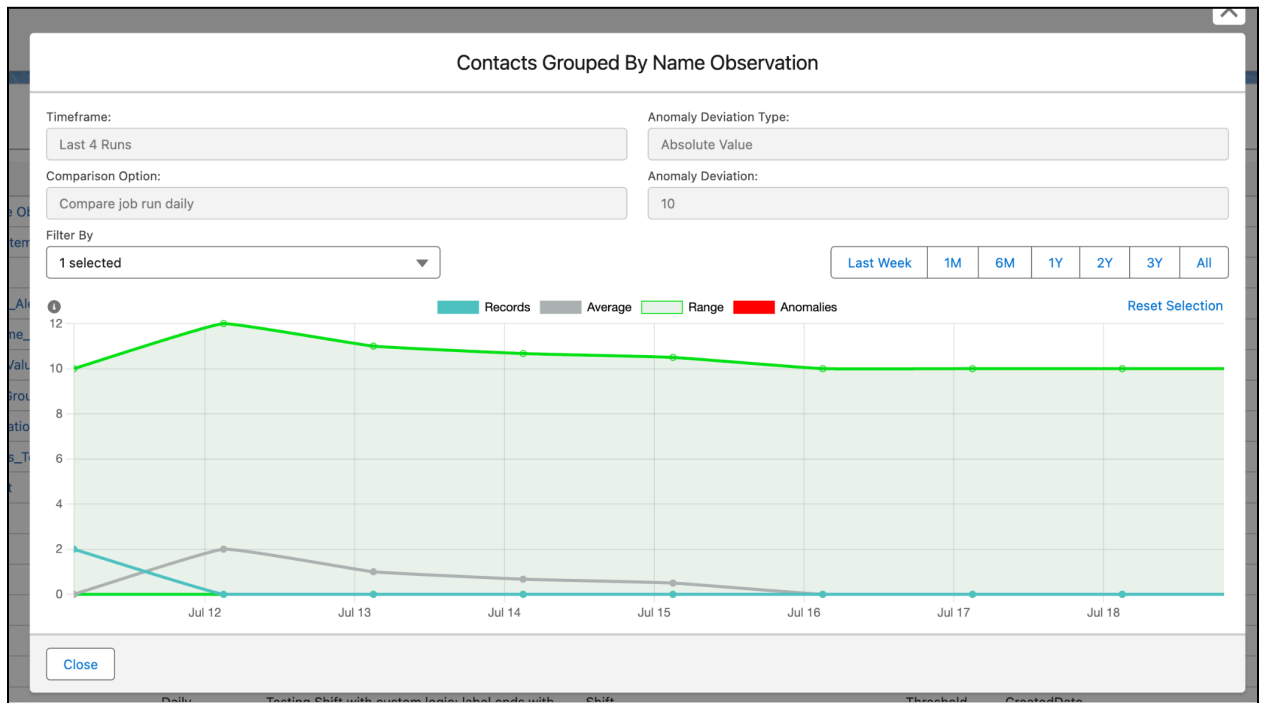
Observee Calculation Function [?]

SUM

[Back](#) [Submit](#)

- k. Additionally, there is a “Help me calculate” button for Anomaly Deviation Value and Threshold Value. It calculates proposed value based on generated historical observations (21 last runs, or 21 days for hourly, 30 minutes and 15 minutes job). When the Observee Timeframe Field is not specified, the value is based on the current value in the org for specified conditions. When the Observee Timeframe Field is specified, the value is based on historical runs, based on a defined field, and differs based on job type:
- Threshold** – calculates the average, max, and min of the count on historical observations, based on defined conditions. The proposed value is based on the average count.
 - Comparison** – calculates the average, max, and min of the count, average, and difference (Absolute and Percentage) on the historical observations, based on defined conditions. The proposed value is based on the average difference (Absolute or Percentage, based on job setup).
5. Over time, a job creates observations over data in your Salesforce org, and you will be able to view a chart with those observations from the “View” button on the Observation Job record, from the “Reliably Home” tab, or the “Chart” tab on the Observation Job

record page.



6. The “Reliably Home” tab also contains buttons to interact with existing Observation Jobs.
- For an active job, it contains:
 - View - button to open a chart with observations
 - Reschedule - button to schedule a new Observation Job, based on the existing. The existing job will be deactivated.
 - Deactivate - button to deactivate Observation Job
 - For an inactive job, it contains:
 - View - button to open a chart with observations
 - Activate - button to change status to Active
 - Delete - button to delete the observation Job and all observations related to it

Active Inactive								Schedule a Job
Job Name	Frequ...	Description	Object	Job Ty...	Datetime Filter Field	Created D...		
Leads by Source by First Attempt Date	Daily	monitor leads by source and first attempt date	Lead	Comparison	First_Attempt_Date__c	Jul 23, 2025		
TC004_True_Positive_Test	Daily		Lead	Threshold	CreatedDate	Jul 9, 20	View	
TC002_Case_High_Priority_Alert_System	Daily	Critical monitoring for high-priority case volum...	Case	Comparison	CreatedDate	Jul 9, 20	Reschedule	
TC002_Lead_Source_Volume_Tracking	Daily	Monitors lead generation performance by sourc...	Lead	Comparison	CreatedDate	Jul 9, 20	Deactivate	
TC002_Opportunity_High_Value_Pipeline_Daily	Daily	Tracks creation of high-value opportunities (>\$...	Opportunity	Comparison	CreatedDate	Jul 9, 20		

Active Inactive								Sc View
Job Name	Frequ...	Description	Object	Job Ty...	Datetime Filter Field	Created D...	Status	
created contacts historical backfill	Daily		Contact	Comparison	CreatedDate	Jul 27, 2025	Inactive	Activate Delete

Package Limits

1. **Observation Job Limits.** There are no strict limits for active observation jobs in the system. But there are two points the user should take into consideration when scheduling an observation job:
 - a. **Time needed for the system to run active jobs.** The more jobs are active - especially if they run at the same time - the more time is needed for them to run. So, if you have, for example, hundreds of hourly jobs, there is a possibility that they will run so long that some of them will be skipped, because their execution time has passed.
Also, that time could be affected by scheduled jobs (Setup -> Scheduled Jobs) in the system.
 - b. **Count of Observation records, which are being created on job runs.** The more active observation jobs are running, the more observation records are being created (especially if the "Group By" option is used). The package does not delete old observations, so you should be careful with the number of observation jobs scheduled. The more jobs you have, the faster you reach the Organization Data Space limit.
2. **Regular Observations Limits.** The package can handle any number of observed records. If the "Group By" option is not used, the job will create only one observation record per run. But if the "Group By" option is used, you should be careful with a field that is used for group by:
 - a. If this is a picklist, there is no problem; the maximum number of observations you will get per run is a number of picklist entries.
 - b. If this is any other field type, it can be any number of records.
Example: You are observing Contact records, grouped by AccountId.
Observation Job runs daily. In your organization, 100 contacts are being created every day, related to different accounts, and this is a normal behaviour.
That means that on the first day, the job will create up to 100 observations (let's call it x). The next day, it will create x + up to 100 observations and so on.
That way, the Organization Data Space limit will be reached very fast.
Recommendation: to avoid this, please use as a "group by" field only the field where you exactly know the count of possible values, and are ready for the same count of observations created per run.

3. **Historical Observations Limits.** The date you can specify as the initial for Historical Observation creation is limited, based on the job Frequency:

- a. 32 years for a Monthly
- b. 32 weeks for Weekly and Hourly

The limit is set with a view to how much data Salesforce could handle without making the Historical Job execution time too long, and considering how many observation records possibly could be created.

But, even with that limitation, when scheduling a Historical Observation Job with the “Group By” option, you should take into account the behaviour described above.