CHATRULES USER MANUAL

Overview

Chatrules, enhances the Chatter experience for you and your organisation. This product can help Organisations to follow records and Unfollow the records on the basis of the created rules. By defining simple rules Salesforce administrator can ensure that users will follow or Unfollow the records that they want. Now, tracking of records is easy.

Chatrules supports six standard objects: Account, Contact, Opportunity, Lead, Case and User. With the help of the defined rules user can follow/Unfollow any record in these six objects. In addition, with the help of dashboards users can view interesting statistics on how Chatter is being used in the Organization.

HOW TO WORK WITH CHATRULES

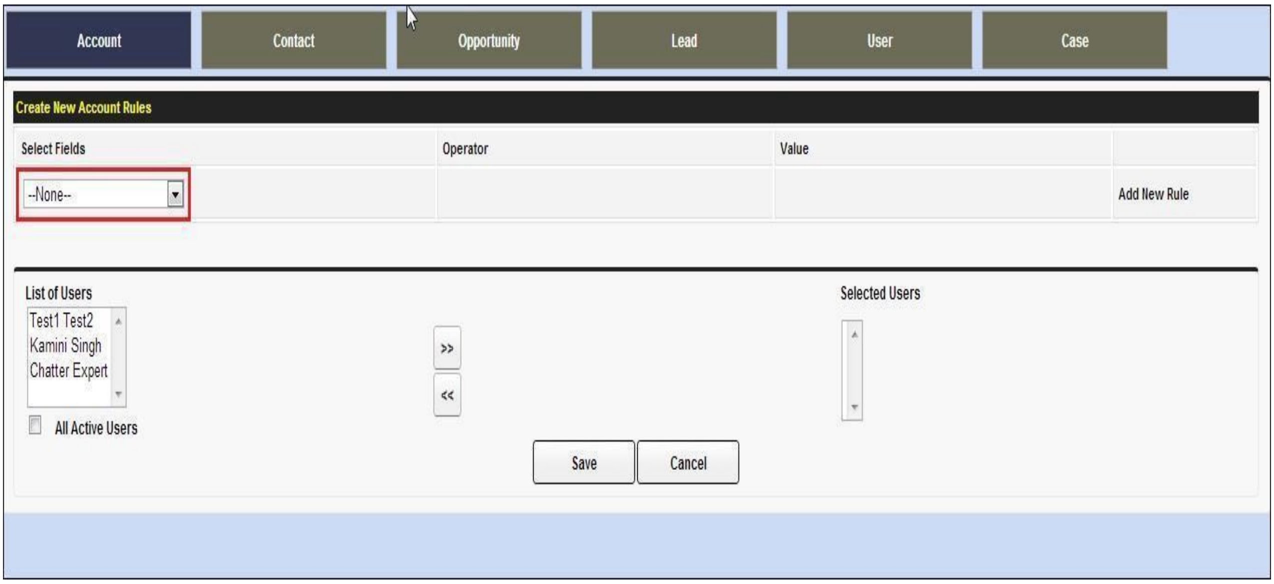
1. How to create New Rule for Chatter Follow/Unfollow: a.

Select the tab for which you want to create the rule.

b. Select the object for which you want to create the rule.

c. Click on the New Rule button for creating a rule for the selected object.

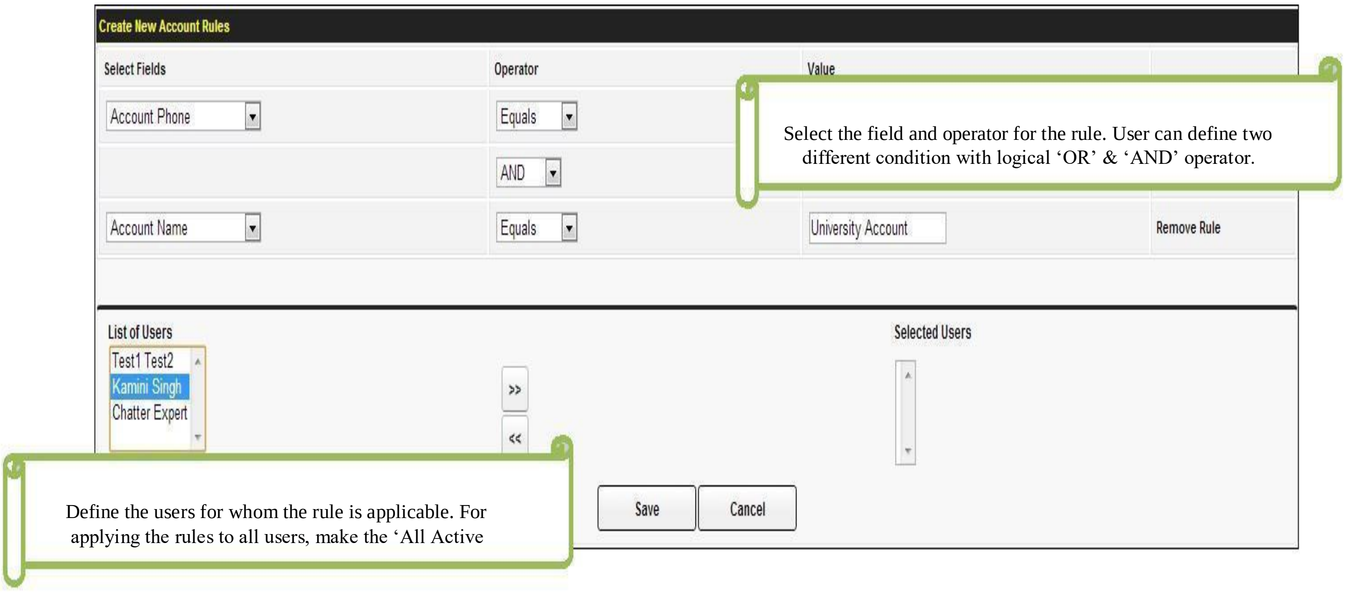
d. Select the field for which you want to create the rule.



Operators which this product supports are:

- 'Equal' and 'Not Equal' valid for fields of all data types.
- 'Contains' and 'Not Contains' valid for fields having data type text.
- 'Greater than' and 'Less Than' valid for fields having data type number.

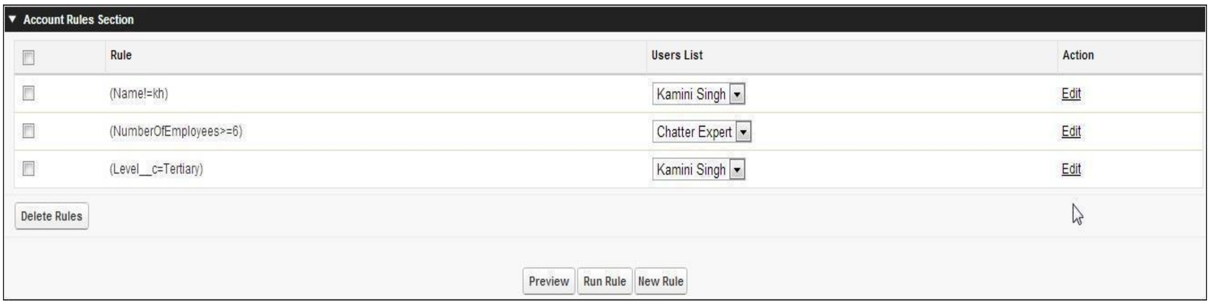
e. Define all required values for defining the rule. Users are allowed to create two conditions in one rule having logical operator between the defined conditions. Click on 'Add New Rule' link for creating another condition in the rule. Similarly, click on Remove Rule link for removing the second condition from the rule.



Click on the “Save” button to save this rule. After saving the rule, you will be redirected to the main page where you can see all created rules for the selected object

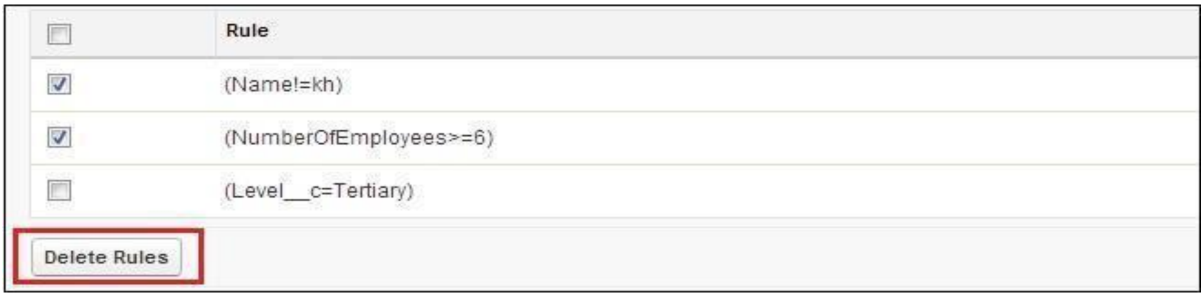
2. EDIT THE RULE

Click on the ‘Edit’ link for making any changes in the created rule. While editing the fields you can update the field value and also allowed to add new condition in the rule if only one condition is present in the rule. Similarly, you can remove second condition from the rule.



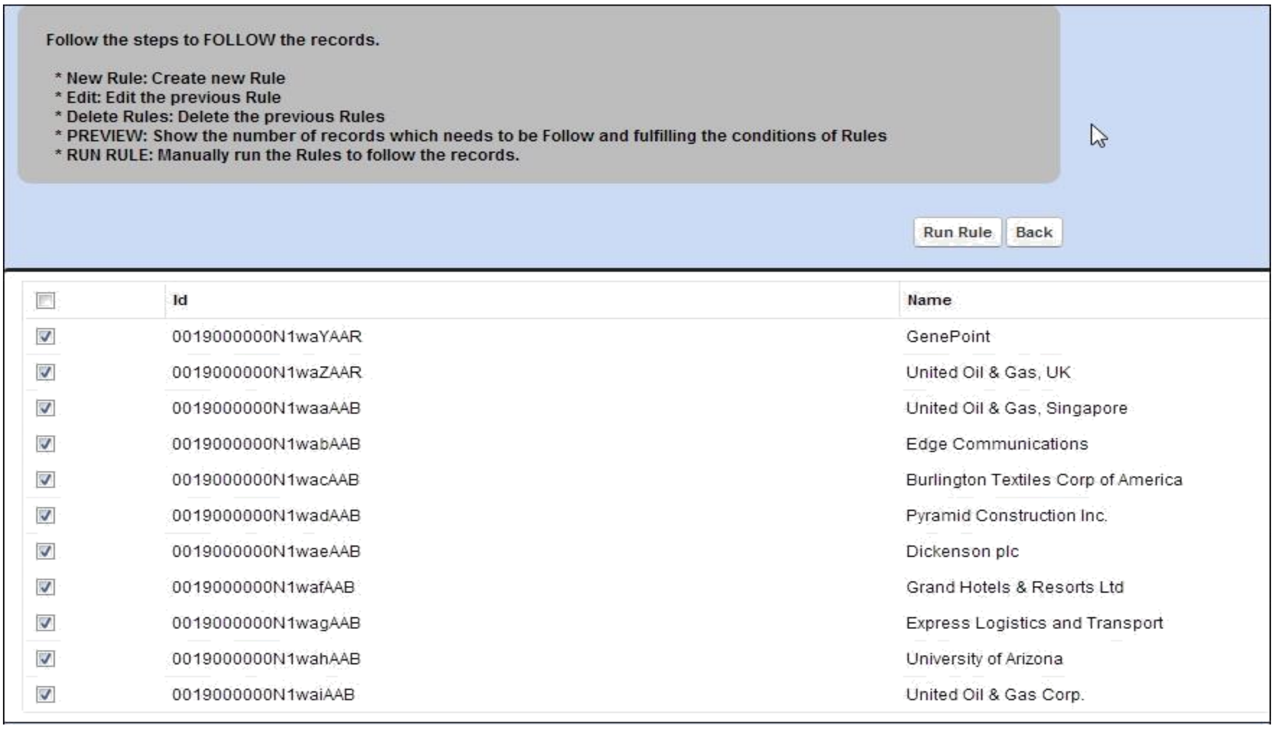
3. DELETE RULES

Make the checkbox true for the rules which you want to delete and then click on the ‘Delete Rules’ button for deleting the rule. Users are allowed to delete multiple rules in one click.



4. PREVIEW RECORDS

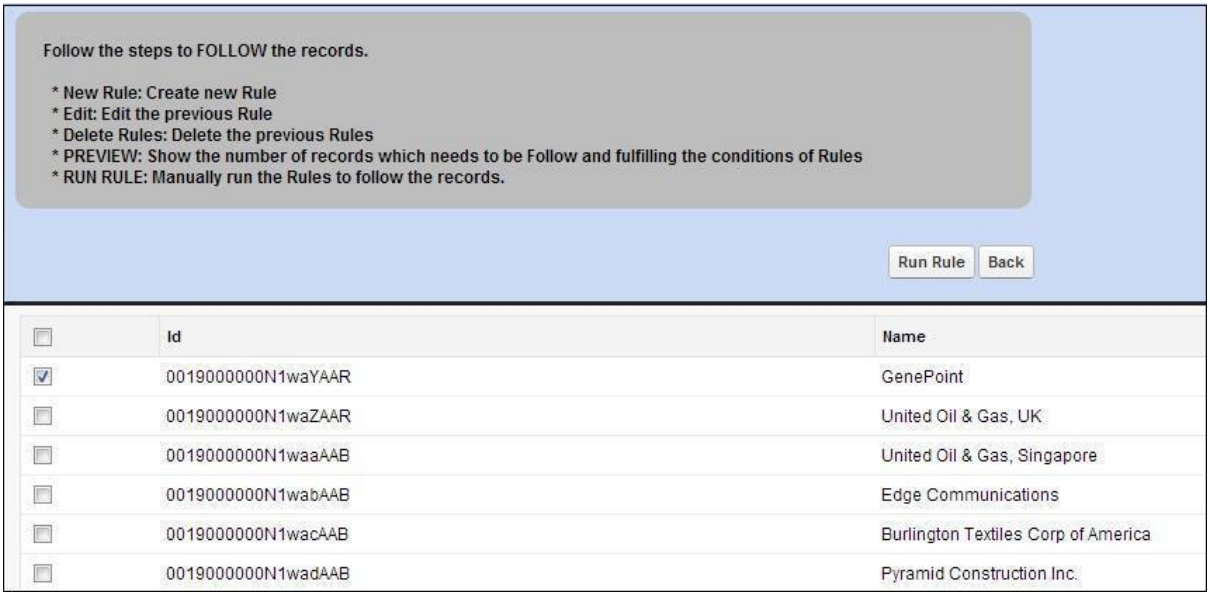
Select the rules by making the checkbox true for the rules and click on the Preview button to check the records of the object which are fulfilling the conditions of the rule.



5. RUN RULES

Run rule button will run the functionality for following or Unfollowing the records. Users need to select the rule for which they want applicable users to follow the records.

Run Rule button is present in main page as well as in the preview page. Users can uncheck the records in preview page for which he/she doesn’t want to follow or unfollow the records.



Note: Steps and functionality is all same for Following and Unfollowing the records.

BACKEND PROCESS FOR FOLLOWING THE RECORDS

Chatrules works for specific profile. User needs to create a custom setting to define the Profile. The Profile field allows user to let the functionality work for a particular profile only.

For creating record for Custom setting:

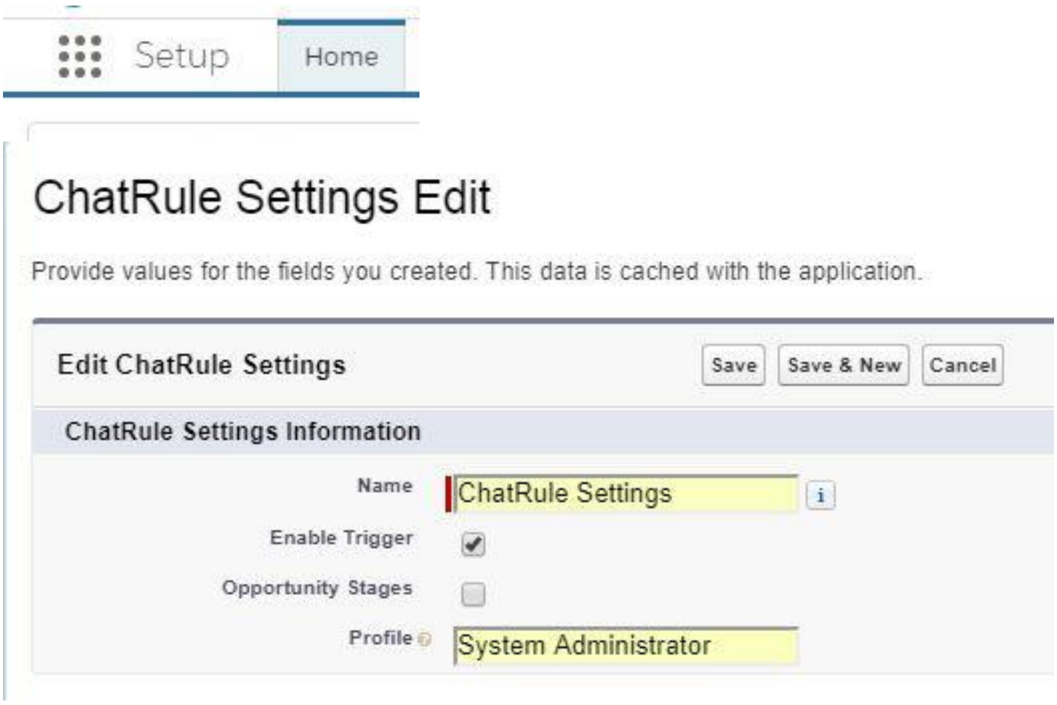
Go to Setup → Custom Code → Custom Setting → Select 'ChatRule Settings' from the available custom settings → Manage → Click on New → Create a record with name 'ChatRule Settings' → Enter 'System Administrator' in the Profile field.

Chatrules also allows users to follow the records automatically. Anytime when records are created or updated in the object records, Chatrules checks whether the created record is fulfilling the conditions of created rules or not. If record fulfils the condition then users starts following the record.

Users are allowed to disable this functionality. They need to uncheck the value for Enable trigger field defined in custom setting.

For disabling the backend process:

Go to Setup → Custom Code → Custom Setting → Select 'ChatRule Settings' from the available custom settings → Manage → Edit the record with name 'ChatRule Settings' → Make the checkbox false.

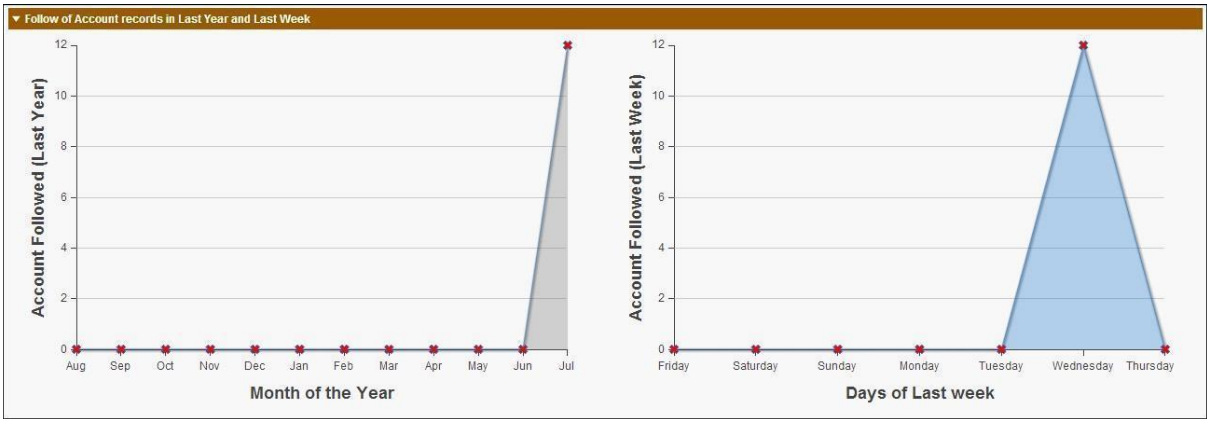


DASHBOARD VIEW

‘Chat Rules’ provides dashboards which helps users to check the records which are followed by most of the users. Dashboard shows top 5 records of objects followed by users.
For checking a Dashboard Go to ‘Chat Rules Dashboard’ tab and check the required dashboard.

List of available dashboard:

User can check number of Account records followed in every month as well as in last week



User can also check Dashboard for top five records from Account, Contact, Lead, Opportunity, Case and User followed by the Users.