RepBlaze Product Guide

Blueflame

Blue Flame Labs Pvt. Ltd.

Email: fireitup@theblueflamelabs.com

Table of Contents

Contents

Overview

What is in the Guide?

This Guide includes how to use RepBlaze and how the application works. It has all the information on tabs, pages, widget details, and configuration.

We will also deploy, customize and support all your requirements:
However, we understand that each business is unique, and will require customizations according to their internal processes. Our team will set-up the entire application according to your requirements and provide 24X7 support free of cost.

Assign Permission Sets

RepBlaze package includes the following 3 Permission Sets:
RepBlaze Admin- This allows complete access to the app i.e. all tabs and all permissions to custom objects and Visualforce pages.

RepBlaze Manager- This allows complete access to the app except for the *Settings* tab. This permission set restricts the function to start/stop the application and is available in the *RepBlaze Admin* permission set only.

RepBlaze User- This allows a basic level of access designed for reps/agents who receive leads/cases. This permission set provides access to the *My Leaves* tab *RepBlaze Assistant* and *Widget* only.

How to Assign Permission Sets:

Go to > *Setup*, then in the left side of the page look for: *Administer* > *Manage* Users > *Permission Sets*.

Select the Permission set from above mentioned sets and click on *Manage Assignment* > *Add/Remove User.*

How to Add RepBlaze Widget & RepBlaze Assistant in Utility

Lightning UI:

Go to > Settings Icon (Top-Right) > Setup > under Platform Tools > Apps > App Manager

Click on Sales Lightning or Service Lightning > Edit

In App Settings > Select Utility Bar > Add Button

Scroll to Component from Custom Managed then select *RepBlaze Widget* and *RepBlaze Assistant.*

Click on > Save

Classic UI:

Click on Setup > Build > Customize > Home > Home Page Layouts

Edit Layout where you want to add RepBlaze Components. (Default is DE Default)

Check the Boxes for RepBlaze Assistant in 'Select Wide Components to Show' section and RepBlaze Widget under 'Select Narrow Components to Show' section.

Click on Next > Rearrange the components as required and then click on Save.

Note: To Show the components on Homepage in classic UI. Make sure that following feature should be unchecked.

Setup > Administer > Security Controls > Session Settings > Enable "Clickjack Protection" for customer Visualforce pages with standard headers

Navigate to RepBlaze:

Lightning: Go to App Launcher and select RepBlaze App.

Classic: Select RepBlaze from Top-Right menu.

RepBlaze Tabs

1. Account Match Settings

One of the differentiating features RepBlaze has against all other the lead routing applications is the lead-to-account matching and auto-conversion. In many businesses, key accounts already exist and if you have incoming new leads from these accounts, the *Account Match Setting*s ensures that account executives mapped for these existing accounts handle the new leads and keeps the ownership of the ongoing customer relationship. This entire feature runs on the lead qualification & account matching criteria.

Queue: The incoming leads should be mapped to a queue. There is an option to select multiple queues as well.

Filter By: Define the data filter logic according to your business needs. You can also add filter logic (AND/OR).

Note: If you don't add any logic then it works with AND logic only

Account Matching Criteria: Select *Match Lead Email* with *Account Website* (in case of domain matching), if you want to select this as one of the criteria. You can also further add multiple level to *Account Matching Criteria.*

Note: Run Lead Query before you save the settings. Once you save the settings only then can you Run the Batch.

Note: You cannot edit the setting if the batch is running. Also, once the batch is running it will not switch off, until manually done so or if the RepBlaze Scheduler is stopped.

How Lead Auto- Conversion and Lead Distribution Works Together?

Consider the *Teams*, *Routing Engines* and *Account Match Settings* is configured.

In the *Account Match Settings*, if you select a queue e.g. USA- California Queue and the same queue is selected while configuring the *Routing Engines*, here is how the both the functionality will be executed:

First the *Account Match Settings* will be executed, RepBlaze will check for the leads that qualify and match the conversion criteria. These leads will be converted to contacts and matched with the relevant account and the respective account executive. The leads that do not fit the criteria will be distributed to the team according to the configured routing settings & criteria.

In case of duplicate *Lead-to-Account* matches (more than 1 account), a list view is created with a checkbox reflecting multiple match criteria and the leads are not distributed through the routing configuration. The manager will have access to these leads, and he has the discretion to route these leads accordingly. We understand that every business is unique and hence this process can be automated according to your requirement through workflows.

If the *Lead Auto Conversion Process* finds duplicate account matching (more than 1 account) it checks the *Duplicate Account Matching* field on lead details.

In this case if the user resolves the duplicate account match, these leads will be re-processed for Lead Auto Conversion. Then, if it meets the conversion criteria it would be converted to contacts and *Duplicate Account Matching* will be set to False for the converted Lead.

2. Region and Holidays

Note: To create a team you must first create a region.

To create a Region, click on > New Region. Set the Name of Region and Time Zone and click on > Save.

For each region record, these are the 3 following are link options:

Holiday: Enter holiday Name and Date then Save. To add holidays from Salesforce, click on > Copy from Salesforce

Note: Copy from Salesforce can copy only non-recurring and all-day holiday.

Edit: Click on this link to edit the region information.

Delete: Click on this link to delete region and its holidays.

3. Teams

This tab is the focal point for all the configuration of Teams, Team Members, Working Hours and the Routing Engines to distribute records.

To create a new team, click on > New Team which will redirect you to a new page to enter team information. You can view all the teams created here.

Team Information: Enter the Team Name

Active: Enable this to distribute records to the selected team.

Object Setting: Select the Object for which you want to distribute the records.

Cap Setting: Cap Limit is the number of maximum records that can be assigned to the user based on a cap type.

Hourly: Records are assigned to team members on hourly basis. e.g. with a cap limit of 2, the user will be assigned only 2 records in that hour.

Daily: Records are assigned to team members on daily basis. e.g. with a cap limit of 2, the user will be assigned only 2 records in that day. Daily capping will reset in 24 hours.

Active Records: Records are assigned to team members based on some pre-defined status with a certain cap limit.

Active Record Criteria: Pre- define the criteria to consider active records

e.g. For the lead object, selected status 'Field and Operator' is 'Equals' and value is 'Working – Contacted' with a cap limit of 2 then, no records will be assigned if the user has 2 records with the criteria as defined above.

Note: If cap type is not selected then no capping will be applied.

Alert Settings:

Generate the alerts and reassignment based on the criteria after records are assigned. To add and define alerts press > '+'

Time Unit: Specify the time here.

M/H/D: When to send alerts in Minutes/Hours/Days

Field Name: Field to match criteria to send the alert

Operator: Select operator to match the condition

Field Values: Specify the field value for the condition

Reassignment On: Enable this to reassign records to define criteria when alerts are generated. At a time only one alert criterion can have Reassignment enabled. After selecting Reassignment Enabled to open a new Panel for Reassignment Setting. (See below for Reassignment Setting)

Notification Template: Select a pre-defined notification template (created in the tab RepBlaze Notification Templates) to send a notification whenever alerts are generated.

Note: If Notification Template is specified then a notification will be sent to RepBlaze Assistant.

Note: You cannot update Alert Criteria if alerts are in process. Deleting the alert criteria will also delete alerts in process.

Reassignment Setting:

If any alert criteria are defined for Reassignment, then this panel will be shown.

Reassign to: Define a destination for records to reassign when the alerts match criteria hold:

Queue: Record will be assigned to the defined queue.

User: Record will be assigned to defined to the user.

From Source: Record will get assigned back to the source, from where the record originated.

Field to update: (optional): This option is used to update the fields when the record gets reassigned.

Click on > '+' to add a field to update the row with Field Name and define field Value.

Working Hours and Time zone:

Define the working hours and region of the team to accordingly assign records to team members.

Click on > Save to create team and save settings. After clicking on the save button you will be redirected to team's overview page.

3.1. Team Overview

On this page, we have 3 tabs:

3.1.1. Team Details*:* List of every detail related to the team like basic information, settings and time zone.

3.1.2. Team Members*:* List of team members and settings to manage details like their working hours, weightage, tags, etc.

Custom working hours for a specific user:

To set custom working hours for specific user/s, click on > ‘Change in Working Hours’ column to team member list.

Manage Members:

You can add or/and remove team members. Here you can view License users in *Available User* tab and all the selected team members in Team Members tab.

Manage Tag:

You can assign multiple tags to team members like language fluency, country, etc. This way the objects are allocated matched to the member’s skills set.

Note: To create and update new tags, Go to > RepBlaze Tag Management tab.

Manage Weighting:

Manage the weightage of the objects assigned according to their members work efficiency, complexity of leads/cases/etc.

Manage Capping:

This button will be shown if cap setting is enabled for the team. Update the cap limit for specific users.

3.1.3. Routing Engine: This tab shows all the created Routing Engines for team. Create a new routing engine by clicking on New Engine button.

3.2. Routing Engine

Routing Engine is responsible for record distribution. Record distribution will be done using configuration in the engines.

Engine Information:

- Engine Name
- Active: Enable/Disable to start-stop record assignment from this configuration.

Engine Setting:

Assignment Engine: Define engine type here.

A. Queue to Team Members: Data source- Queue selected and records are distributed to team members.

B. User to Team Members: Data source- User selected and records are distributed to team members.

C. To Queues: This doesn't have any data source option. All records from queues and team members will be picked up for this and get distributed to defined Queue.

Note: This is the special engine and can be used as archive the junk or old records. This engine doesn't respect the working hours because records are getting assigned to queue not to team members.

D. Pull Engine (Queue to Team Member): Semi-Manual engine, when enabled allows members to pull records form the Queue manually. Members can do this with the help of a > *Pull button* in the *Widget*

E. Pull Engine (User to Team Member): This is same as above Pull engine but in this case, the data source will be a User.

F. Push Engine: This is a manual setting enabled by the Manager using the 'RepBlaze Push Pipeline' tab. Select the desired Push Engine to pull records from a user to another user/s. In this case the manager can define the maximum limit for pulling these records. (max 500)

3.3. Load Balancing Algorithm:

This will be selectable for the Queue to Team Member and User to Team Member engine type.

- **Round Robin Assignment:** All records get assigned the Round Robin way i.e. starts with an assignment to member and continues successively to others in turn
- **Round Robin - Sticky Assignment:** It is partial round robin. An object criterion sticks e.g. if a member is assigned an IBM lead then he will continue to get IBM successively
- **Smart Match Assignment:** This algorithm matches data from Salesforce defined object and assigns the records to users
- **Equal Assignment:** This algorithm distributes records equally within the random way, even if someone is not available/ logged off/ away from the desk for a couple of hours. The objective of this algorithm is to ensure equal opportunity and healthy competition in the team.

Note: There is a difference between Round Robin and Equal Assignment: Round Robin distributes equally if all users are available. Let's say if a few reps are not available for one hour. These reps will not receive the records when they are away, and assignment will resume once they are online. But the time when they are away creates a lag in the number of leads assigned as compared to their peers. Equal Assignment will make sure this does not happen and every team member gets the same number of leads.

Enable Weighting: Checking this checkbox will consider defined weight of team members.

Pull Limit: This is only available for *Pull Engine (Queue to Team Members)* and *Pull Engine (User to Team Members)*. This defines the limit for the number of records assigned in a single pull. The pull button is in *RepBlaze Widget*.

Ignore Team Cap: Checking this box will not respect the capping limits to assign the records.

Note: This is available only for Pull Engine (Queue to Team Members), Pull Engine (User to Team Members) and Push Engine (All Record to Team Members).

Execution Priority: It defines execution priority of the routing engines in batch. This is available for all auto routing engines. *(Queue to Team Members, User to Team Members, To Queues)*

Let's say we have 3 routing engine configurations in the app, and we set the execution priority as below.

Engines	Execution Priority	Execution Sequence
Engine 1	10	1
Engine 2	110	2
Engine 3	Blank	3

Note:

- *Input should be between 0 to 9999.*
- *If it is blank, then it will be processed at the end.*
- *If 2 routing engines have same priority, then it will be a random pick.*
- *Priorities will work across the teams.*

3.3.1. Round Robin Assignment:

This assignment does not require any additional configuration. Here, as records are created, they are assigned to users in sequence.

3.3.2. Round Robin - Sticky Assignment Settings:

It has selection available for Round Robin -Sticky Assignment Algorithm

Sticky Field: Defines which field will be applicable to sticky algorithm.

Sticky Area:

Routing Engine: Applies only to current Routing Engine.

Team: Applies only to current team.

Global: Applies to all the teams.

Sticky Time: Time duration for which the records remain stuck to the team members.

Assign to other if Member Cap limit is full: When enabled, if a member cap is full then record get assigned to next available user.

Assign to other if Member is on leave: When enabled, if a member is on leave then record get assigned to next available user.

Assign to other if Member is not logged in: When enabled, if a member is not logged in from RepBlaze Widget then record get assigned to next available user.

3.3.3. Smart Match Assignment Setting:

Object to Match: Select object to match assignment rule.

Assign to: Whom to assign the records if any match found from Object to Match.

Matching Rules: For defined object of the team the configured field value should match with the field of 'Object to Match'

Assign to Route Member if Member is on leave (High Priority): When enabled, the records will be assigned to the suggested route to member defined

Assign to other if Member is on leave: When enabled, then record is assigned to next available user

Assign to other if Member is not logged in: When enabled, if the member is not active on RepBlaze Widget then record get assigned to next available user.

Account Data Filter: We can define a condition for Object to Match. In this case data will be filtered according to the condition.

Data Filter: In this section, we can further define filter criteria on the data received from the source. You can also customize the order by logic for these records.

Fields to Update: Define the field name and field values to get updated when records are distributed from the engine.

Run Query (Button): If we have applied some filter logics or order by then we recommend to > Run Query. If any error in the logic, it will be shown here.

Notification Template: Select notification template here.

3.3.4. Equal Assignment Setting:

We have to the setup Equal Assignment Algorithm Settings in Teams tab.

Equal Assignment Duration:

Daily: If this option is selected then Equality will be maintained on the daily basis.

Weekly: If this option is selected then Equality will be maintained on the weekly basis.

Select *Queue to Team Members or User to Team Members* in the Engine Type. Select *Equal Assignment* in Load Balancing Algorithm.

4. Notification Templates

Create and Define Notification templates for various notifications in the app.

Click on > New Notification Template to create new notification template.

Name: Name of the Template.

Subject: Subject for notifications.

Information Type: Information, Warning and Error

Message: Body of the Notification.

Utility Icon: Select an icon from Salesforce website and copy the name of the utility icon and paste in box.

<u>Note: Updating the existing notification template will update the previous notification alerts.</u>

5. Assignments

Find all the logs and related information of assignment and reassignment made via RepBlaze app. It also shows failure reason.

<u>Note: This page can show 10000 latest assignment logs. Apply filter for any specific record assignment.</u>

6. Routing Jobs

Routing jobs are created whenever assignment is processed. It shows jobs from all type of engines.

7. Tags Manager

Create, manage and assign Tags to team members. e.g. Tag for category can be Language & Country, tags can be English, Spanish, German & India, Canada, Singapore respectively.

8. My Leaves

Reps can leverage this tab to apply for leaves:

Suggested Route to: Suggest a route for your records to your team member. While approving the manager can approve or suggest an alternative member.

Start Date: Start date of leave

End Date: End date of leave

Reason: Define reason of leave for your manager to view

Once approved by the manager, RepBlaze will not assign any records to the member on leave.

Note: User can edit any leave if it is in pending state.

9. Leave Management

Complete leave management platform for the manager to view all leaves applied. Manager can approve/ disapprove leave for team members. Click on > 'Open' to view a leave application record.

Route to: If a team member has suggested a route to user then the manager can approve or change the Route to user.

Note: This works only for Smart Match Algorithm.

Message: Manager can send a message when approving and disapproving the leave.

Here Managers can also apply for leave for any other rep for cases like medical emergencies, etc.

10. Push Pipeline

This tab shows a list of all Push Engines. Here managers can assign records manually in bulk.

Push Routing Engine: Select a Push Routing Engine

Maximum Record Pulling Limit from Data Source User: Manager can set the limit if records assigned with a maximum limit of 500 per transaction.

Data Source User: List of users who are part of selected routing engine.

Data Destination User(s): Here we can select multiple users.

Preview Button: A message will reflect the number records distributed. It will consider the pre-defined cap limit for the destined user with an appropriate warning.

Click on > ‘Distribute’ to distribute the records.

11. Broadcast

Here managers can broadcast messages to their team. The message will broadcast on RepBlaze assistant.

Team: Select the team and team members in the broadcast list.

Notification Template: Select notification template for notifications.

Additional Message: Add more custom information here (Notification Template Message + Additional Message).

12. Settings

Assignment Scheduler Management:

Assignment Scheduler is responsible for record distribution. Only the admin can start or stop it and view the status of the scheduler.

Deactivate the Routing Engine, in case of failure: If enabled, in case of any failures the routing engine will automatically deactivate unless it manually started.

Notify to User, in case of failure (via Email): If enabled, selected user will receive an error alert via email.

RepBlaze App Diagnosis:

The diagnosis scheduler by default is enabled at the time of installation and runs continuously to reflect the status of the scheduler. In case of any unusual break, it will automatically restart.

Note: If in any case, it is turned off then please start it immediately. A link will be shown when this is not running to start.

RepBlaze License Details:

View all the RepBlaze license details and the license status here.

Note: View RepBlaze License Overview is accessible to RepBlaze-Admin only

Allowed Licenses: Total allowed/purchased license for RepBlaze. (For sandboxes or trial orgs, Allowed Licenses will reflect as -1 where unlimited users can be added).

Used Licenses: Count of total users that have RepBlaze app license.

Used Licenses by RepBlaze: Count of total license that are being used by the RepBlaze app.

Status: App license status.

Note: View license details overview at every level here. A company can save the cost if any license is not being used.

Widget Settings:

RepBlaze widget is a feature available to the team members.

Enable Login/Logout: If enabled, the team members have to login/logout for their availability and only then will the records get assigned. If a member is a part of multiple teams then he can choose his availability for record assignment for that team.

Note: The members have to login to RepBlaze separately to enable record assignments. Standard Salesforce Login does not automatically imply RepBlaze login/logout.

Enable Pull Button: If Pull Engine is defined and enabled, members can pull records.

RepBlaze Data Management:

Manage the logs and/or data created by RepBlaze application here.

Erase Assignment Logs Older than 'x' days (x can be any number of days)

Note: While creating the team, if the alert criteria defined is x days and here if you choose to erase assignment logs in <x days the default days will set to x+1 day.

Erase Routing Job Logs Older than x days i.e. the history of every assignment process.

Erase Read Notifications Older than x days i.e. the notifications marked as read in RepBlaze Assistant.

Erase Unread Notifications Older than x days i.e. the notifications unmarked as read in RepBlaze Assistant.

Erase Sticky Assignment Logs Older than x days i.e. the internal logs created by Routing Engine with Sticky Assignment Algorithm to maintain sticky behavior

Note: If the sticky time is defined as x days for routing engine and here if Erase Sticky Assignment logs is < x days the default days will set to x+1 day.

Show Advance Settings/ Hide Advanced Settings: Below are some advance critical settings:

Scheduler Settings:

Record Assignment Batch Frequency (Minutes): RepBlaze runs a scheduler in background to process routing engine configuration. Define the frequency between the jobs here.
Example: If you have 3 Routing Engines and frequency is 5 minutes. Let's say batch started running at 10:00 AM. It will take all the three configurations one by one and process them. Let's say the process ended on 10:07 AM. Now next batch will be scheduled on 10:12 AM (5 minutes after).

Alert Checker Batch Frequency (Minutes): RepBlaze runs a scheduler in background to job to check alerts if any alert criteria are defined. Define the frequency between the jobs here.

Note: We recommended you use minimum 5 minutes in frequency for an efficient Salesforce org performance.

Stop All RepBlaze Scheduler Button: RepBlaze runs 3 background schedulers. (Routing Engine, App Diagnosis, Alert Checker). In any case if admin wants to stop all the scheduler then clicking on this button will remove all scheduler jobs.

Manual RepBlaze Records Deletion:

RepBlaze have few custom objects to maintain the app setup. In some cases, if you are thinking to remove any objects data (logs) manually instead of auto deletion. Then user can use this feature to remove data.

RepBlaze Object: Select object to perform deletion then click on Erase Records from Selected Object.

Clicking on this button will trigger a batch to delete records. It may take some time to erase records from Salesforce.

Note:

- *Erasing from here may cause the issue in RepBlaze functionality.*
- *There may be some delay in this process because it processes in batches.*
- *We strongly recommended that app's other functionality should be turned off while performing this. It may cause a problem for other running functionality.*

13. RepBlaze Widget

This is a powerful component of the app which is built on lightning component framework and is a tab accessible to the reps. It has two functionalities which can be enabled in RepBlaze settings by the Manager.

Login/Logout: Team members have to login/logout to show their availability for records assignment.

If user is member of multiple teams then all numerous login/logout icons with team names will be shown on the widget.

Pull: If any Pull Engine is defined this feature > Start Pulling will allow members to pull records manually.

Note: While pulling records it respects the capping, login hours, leaves and holidays

The members have to login to RepBlaze separately to enable record assignments. Standard Salesforce Login does not automatically imply RepBlaze login/logout.

14. RepBlaze Assistant

This is another very powerful feature of App and built on Lightning Component framework accessible to the users.

Using RepBlaze Notification Template, create notifications like Information, Errors and Warnings. All these notifications will appear in RepBlaze Assistant.

No more navigating back and forth or refreshing pages to view the latest assignments or alerts. User can prioritize the task and mark individual notifications when done.

Types of Notifications received in the widget:

Record Assignment

Alerts on Team Level

Record Re-assignment

Broadcast Message

Note: For various types of notification, a notification template should be defined in routing engines and wherever Notification Template is required. Enabling Notification templates for specific alerts/Routing engine is optional.

15. RepBlaze Supervisor

This tab is available to managers and admins. This tab shows all current day assignments and its related information. It has an *Assignment Scheduler* indicator in the right top corner. If the scheduler is not running, then it shows a Red alert and if it is running then it blinks in green.

This Feature have 3 Views:

Main Overview: This will be landing view when the manager goes to the *Supervisor* tab. This tab will show only active teams and team-wise routing engines configured under the team, aggregate count of assignments, reassignment, alerts, errors.

This will also show the list of latest five assignment jobs. The manager can view all the jobs by clicking on the 'View All Jobs' link at the bottom right.

Team Overview: Click on the team to further see team-wise information. This page has 4 tabs:

i. **Team Members:** This tab shows the list of Active team members and member-wise login-status, assignments, reassignments, alerts
ii. **Routing Engines:** This tab shows the list of Active Routing Engines configure under that team
iii. **Assignments:** This tab shows latest 50 assignment of the current. The user can view all the assignment using *View All Assignment* link
iv. **Login Activity:** This tab will be shown only if the Login/Logout feature is enabled. It shows the latest 100 login activities. The manager can see all the details related to login/logout

Note: Logout Channel => This column shows that how the users logged out. There are 5 ways that users can log out or the manager can also control log out on their behalf.

- **Supervisor**: through Supervisor tab and one more instance here if the engine refreshes outside the working hours of the members
- **Team**: though Team tab.
- **Widget**: through RepBlaze Widget.

- **Reassignment Settings**: user can be logged out through Reassignment Setting under the Team tab

Team Member Overview: Clicking on an individual team member, this page shows assignments and login activity of the team member.

<u>Assignments:</u> This tab shows 50 latest assignment of the day. The user can view all the assignment using 'View All Assignment' link.

<u>Login Activity</u>: This tab will be shown if the Login/Logout feature is enabled and shows the latest 100 login activities.

16. Assignment Analytics:

This tab shows the complete assignment analytics i.e. count of assignments across days; team-wise, engine-wise and user-wise.