InRule® for Salesforce®

Write, Update, and Test Rules for Salesforce—Without Apex™ Code Modifications!

InRule® for Salesforce® is the leading enterprise-grade business rules management system (BRMS) for Salesforce. For organizations using Salesforce as a platform for their business or to overcome limitations around managing complex business logic, InRule for Salesforce provides the ability to create and maintain automated decisions in Salesforce without the need for code modifications.

MAKE SALESFORCE DO MORE FOR YOUR ORGANIZATION

InRule for Salesforce empowers business analysts and other non-technical subject matter experts to create and maintain complex decision logic that otherwise requires hard coding logic in Apex code. Placing ownership of decision logic into the hands of those who best understand the requirements allows organizations to accelerate the speed of decision automation (and compliance with evolving regulations) while reducing the risk of errors due to miscommunicated requirements.

With its intuitive interface, InRule for Salesforce simplifies rule authoring and management, allowing business users to easily import entities, picklists fields, and relationships from custom or standard objects within Salesforce. Additionally, authoring and management are tightly integrated with testing in the Salesforce environment. By allowing rule authors to reference live system data for testing, InRule for Salesforce streamlines rule verification and provides confidence in automated decision logic.

USE CASE: DENTAL INSURANCE PROVIDER

A dental insurance provider in the Midwestern U.S. sought to create a web-based quoting tool that would drive business for its sales team. The initial quoting tool was driven by logic that was originally housed in a 4,000-line PHP file that called 10-15 tables throughout the processing of the code. Any plan factor required at least a two-week turnaround, requiring IT to sift through the overwhelming code file to make the change and push it live. Any changes or new plans required at least a two-week turnaround, requiring IT to sift through the overwhelming code file to make the update and push it into production.

It was imperative that the new web-based quoting tool integrate with the organization's Broker Management Tool, which was running within Salesforce®. The team quickly realized that their rating algorithm was too complex to implement directly into Salesforce with custom components, so
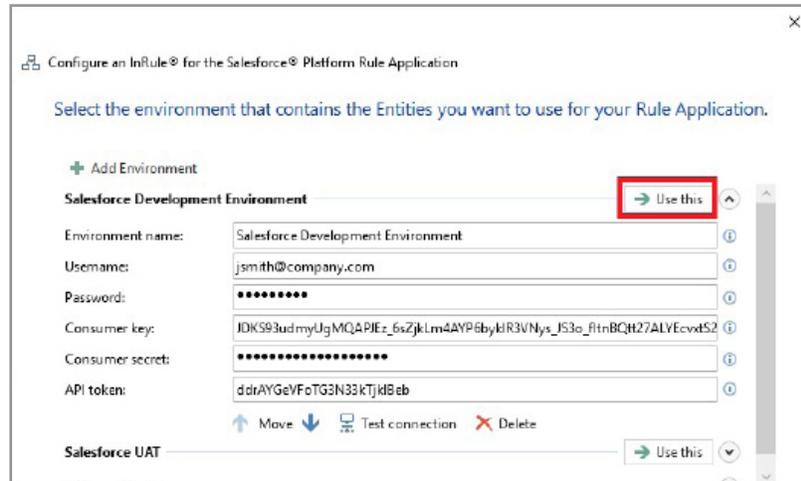
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Benefits: InRule for Salesforce

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» Enable Subject Matter Experts to author and manage rules - they know the business best
» Quickly make changes to application logic - no need to sift through code for every rule change
» Gain confidence in rules - use existing Salesforce data for testing
» Maximize your investment - allow Salesforce to do more

inrule
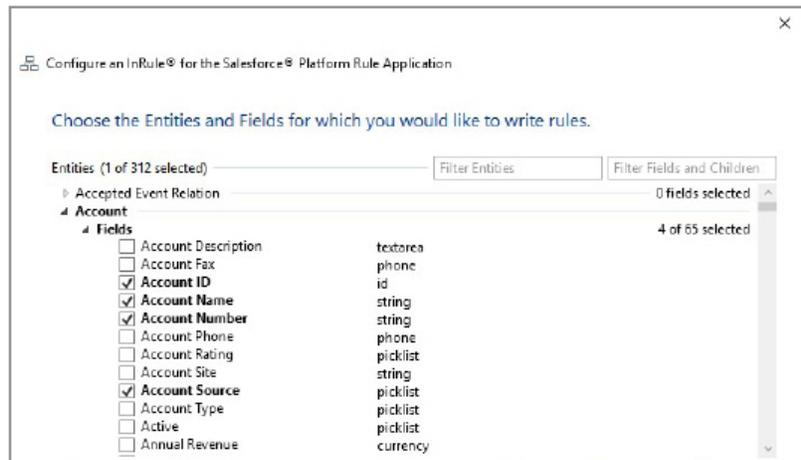
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they searched for a rule engine that could externalize the logic while allowing them to maximize their existing Salesforce investment. Since their selection and deployment of InRule, the time required to create a new rating plan within the system has been reduced by 95 percent and InRule is able to seamlessly run against Salesforce objects.

INRULE FOR SALESFORCE MAKES IT EASY TO AUTHOR RULES AGAINST SALESFORCE OBJECTS AND TEST RULES AGAINST SALESFORCE DATA:
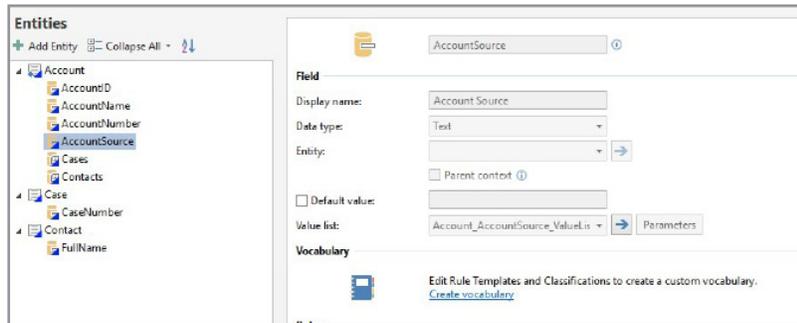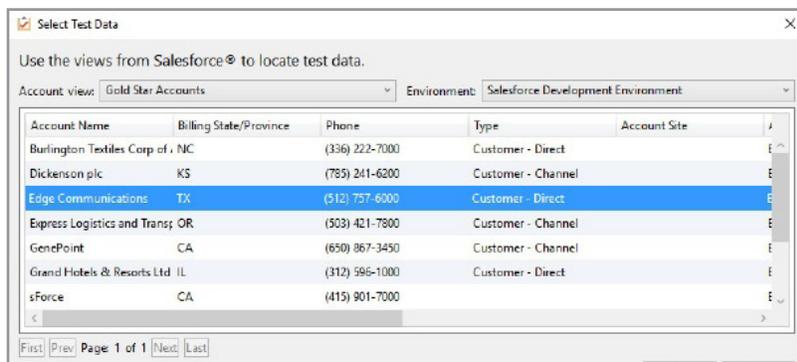
» Configure and connect to a Salesforce environment.

» Once connected, choose the entities and fields that you will be managing in InRule. This includes look-ups or reference fields, one-to-many relation-ships and pick-lists.

» The selected Salesforce objects and fields are then loaded in the Rule Application as InRule entities, fields and value lists. The full feature set of irAuthor can then be used to write rules.

» Once you're ready to test your rules, you can use the extension's Test options to pull test data directly from the configured Salesforce environment(s) and load into irVerify.

Ready to learn more? Visit: www.inrule.com/integrate/salesforce/

Or request a free trial at: www.inrule.com/inrule-saas-trial-request/