

2021

Introduction

FORCE RULES
ADVANCE ASSIGNMENT RULES
WINTER'21



Force Rules

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1 OVERVIEW

Force Rules is an Advance Owner Assignment application which overcomes Salesforce Out of the Box Rule's limitations. While Standard Salesforce rules work only on Lead & Case, Force Rules supports all Standard & Custom objects.

Force Rules a native Salesforce Platform based application that can work across all Salesforce based cloud modules (e.g., Sales, Service, Community etc.).

Force Rules helps Businesses to automate assigning records to Individuals & Queue (Group of Members).

2 WHY FORCE RULES?

We believe Force Rules is an essential tool and should be part of on-boarding than other usual business apps.

Force Rules help Organizations to route data to the best suited person or team. Whether it's categorization of Deals to appropriate Sales Reps based on Customer size or assigning the Workshop to matching Skill-set Instructor.

Force Rules reduces the burden of managing resources and finding the right fit for records.

3 COMPANY PROFILE

Horicent Systems is a Cloud CRM based Consulting Firm established in India. We have been servicing customers across the globe and have been helping them setting up CRM per their Business Process.

Horicent has Certified Developers & Data Specialist to help clients customize Salesforce instances & migrate data from existing Database to Salesforce.

4 FEATURES

4.1 ROUND ROBIN

Along with Assigning records to Individuals and Queues, Force Rules also allow the records to be assigned to Queue & Crew (Custom Group) members in Round Robin fashion. For Queue, it assigns the records based on sequence active members are ordered in Queue. Whereas for Crew, there is an option to custom their sequences using Order Number.

4.2 UNSUPPORTED QUEUE OBJECTS

Salesforce has few Standard Objects which doesn't support Queue, i.e., for such objects record Queue cannot be assigned as Owner. Though these objects don't support Queue to be assigned as Owner, we have extended our Round Robin functionality using Crew.

Crew is a custom defined group, which can have Crew Members associated with it, and on records meeting rule's criteria Crew Members can be assigned as Owner in Round Robin fashion.

4.3 SUPPORTS CUSTOM OBJECTS

Customization is the key to success of the Salesforce Platform. Every business has their own set of entities and data models. Force Rules extend the business flow by supporting Custom Objects. Where admin can define rules to assign Custom Objects to Individuals, Queue or Crew Members.

4.4 ADVANCE DATE CRITERIA

Date fields play an important role in managing the data from Past. Force Rules provides user friendly filter criteria for admin while creating the rules.

4.5 CONTROL USER'S UNAVAILABILITY

The Force Rules engine is built smart enough to avoid Users which are unavailable. This can be achieved 2 ways:

- Admin can De-activate the User profile
- Mark the respective Crew records

4.6 SUPPORTS BULK DATA

Every Organization needs data restructuring and cleansing once in a while. Data Migration is part of such processes. Whether it's a Data Migration to existing entities or setting up new data modal. Force Rules engine is well-versed in handling bulk records and assigns the records to configured owners precisely.

4.7 LOW CODE POLICY

Salesforce Platform always encourages users to rely less on code and do the customization using Point & Click tools.

Force Rules engine is developed to support the Process Builder & Lightning Flows, so that Customers don't have to rely on Support or hire a Developer to configure the application.



4.8 COMMUNITY CLOUD / EXTERNAL USERS

Force Rules is compatible with Community Cloud and supports Record assignment to External Users along with Internal Agents.

4.9 MULTI-LAYER CRITERIA

Force Rules engine has been designed in such a way that it can support multi-layer objects-based criteria. However, to keep the application lightweight we have kept this feature configurable through the backend. For more details contact Force Rules support team.

5 STANDARD ASSIGNMENT RULES & FORCE RULES COMPARISON

Feature	Standard Assignment Rules	Force Rules
Standard Object	Limited (Lead & Case)	Yes
Custom Object	No	Yes
Round Robin	No	Yes
Advance Date Criteria	Yes	Yes
Multi-Layer Support	No	Yes (Contact Support)