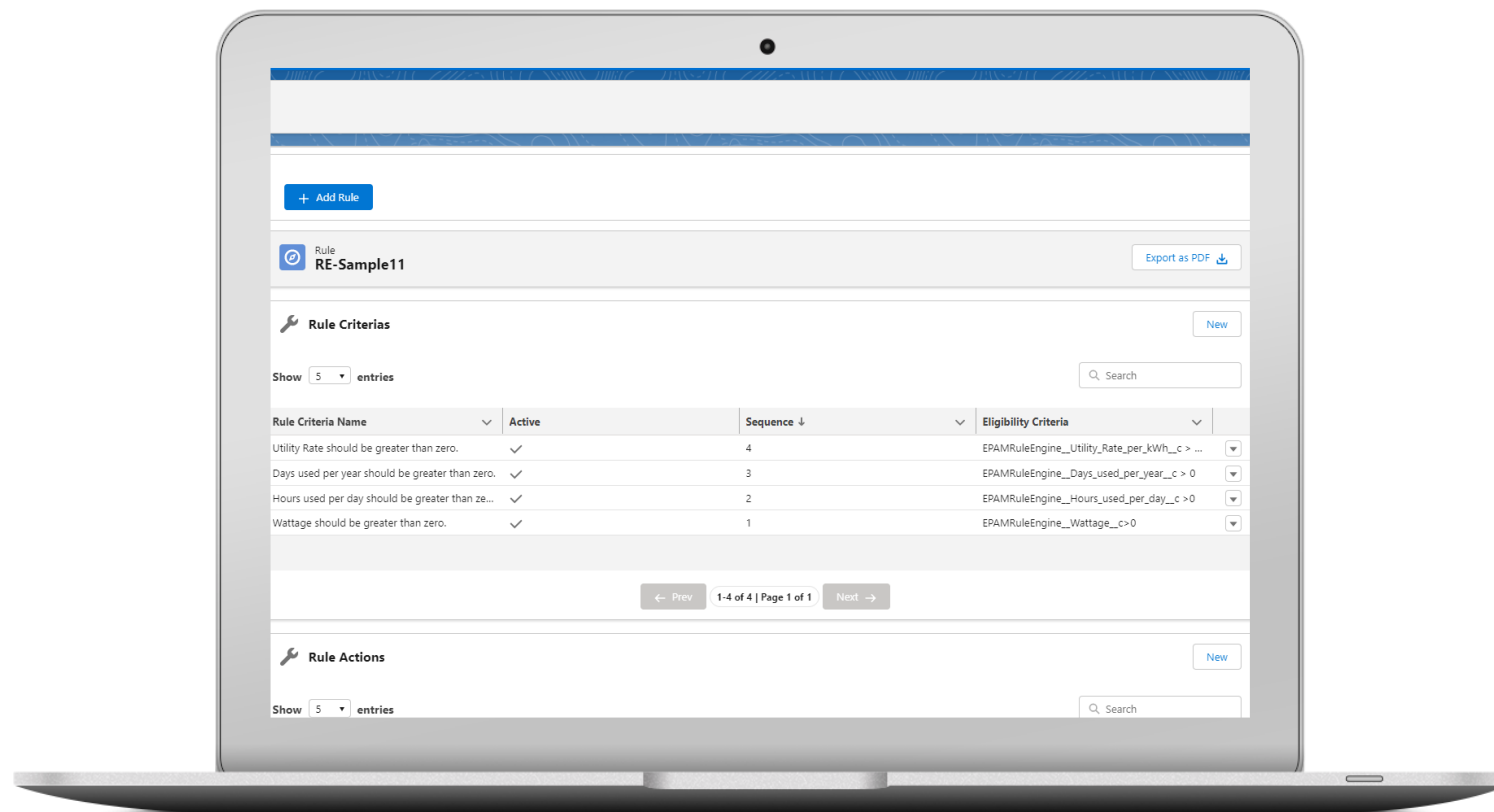


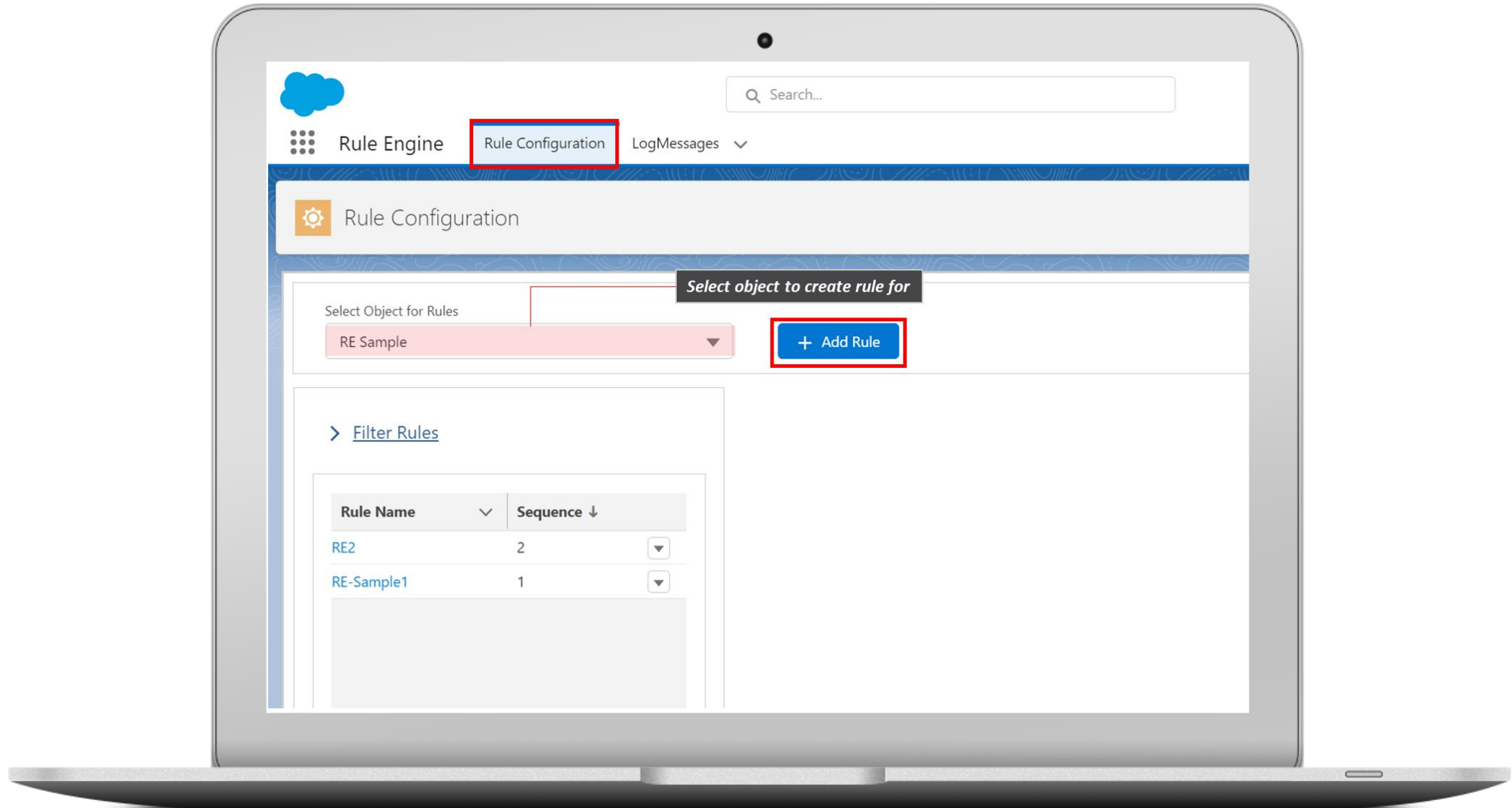


Rule Engine

User Guide



Rule Configuration



New Rule (2/2)

Search...

New Rule

*Rule Name
Re Sample 4

Rule Type
Field Evaluation Configuration

Rule Condition ⓘ
All Conditions Are Met

Is Execution After ⓘ
☐

Is Execution Before ⓘ
☐

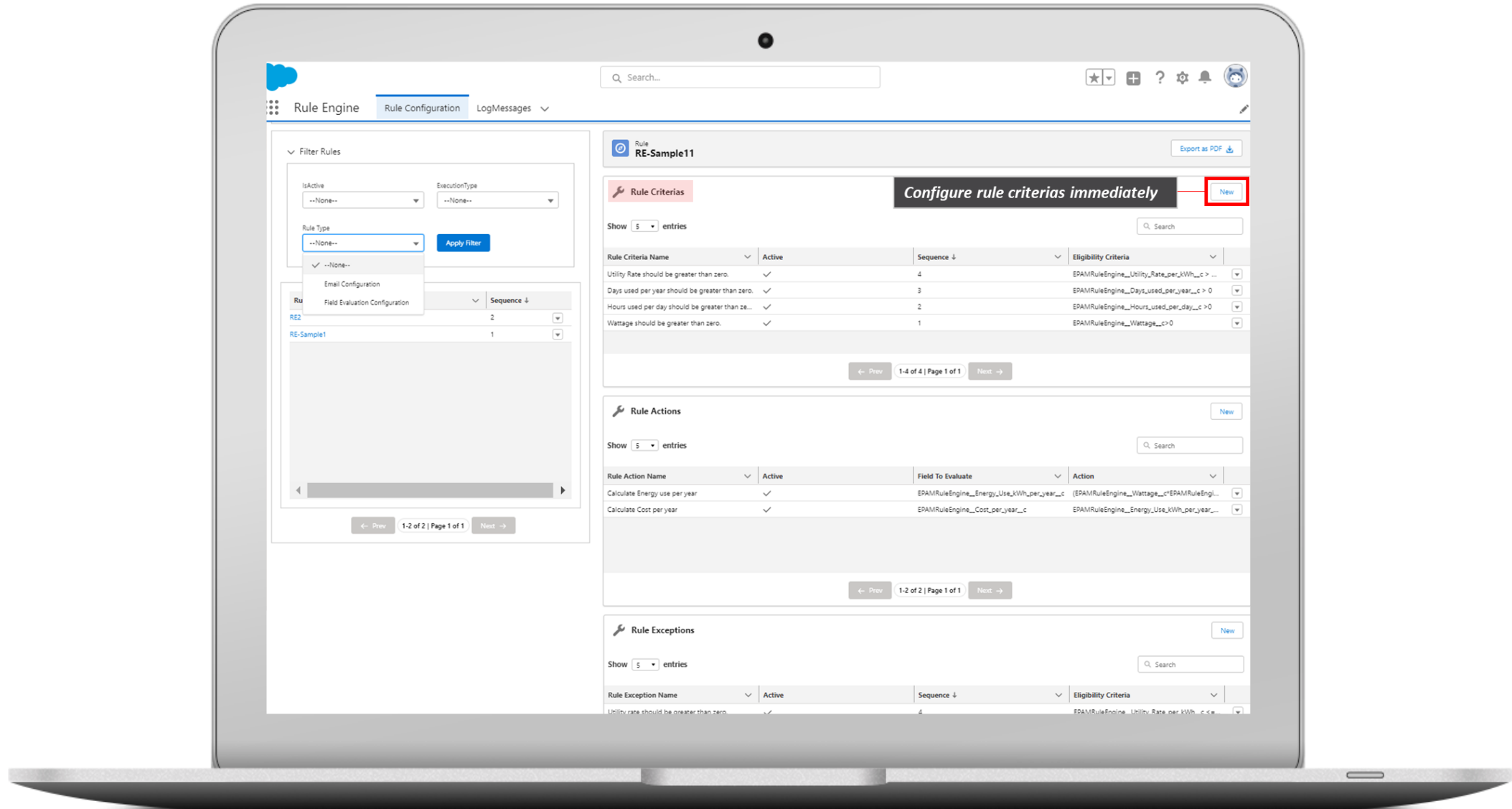
Active
☒

Sequence
1

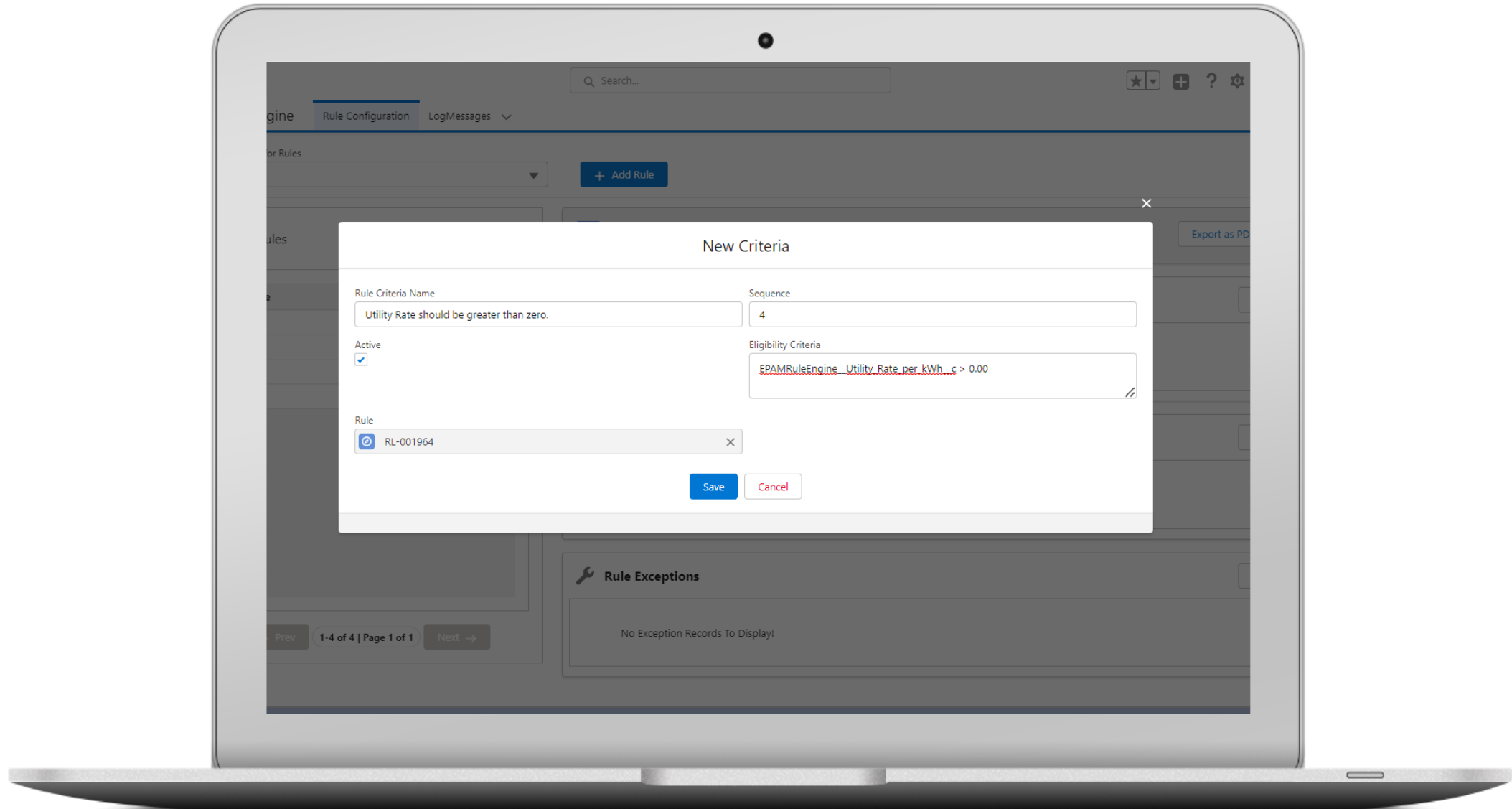
Rule Object
EPAMRuleEngine_RE_Sample_c

Save Cancel

Configuration of Rule Criteria (1/2)



Configuration of Rule Criteria (2/2)



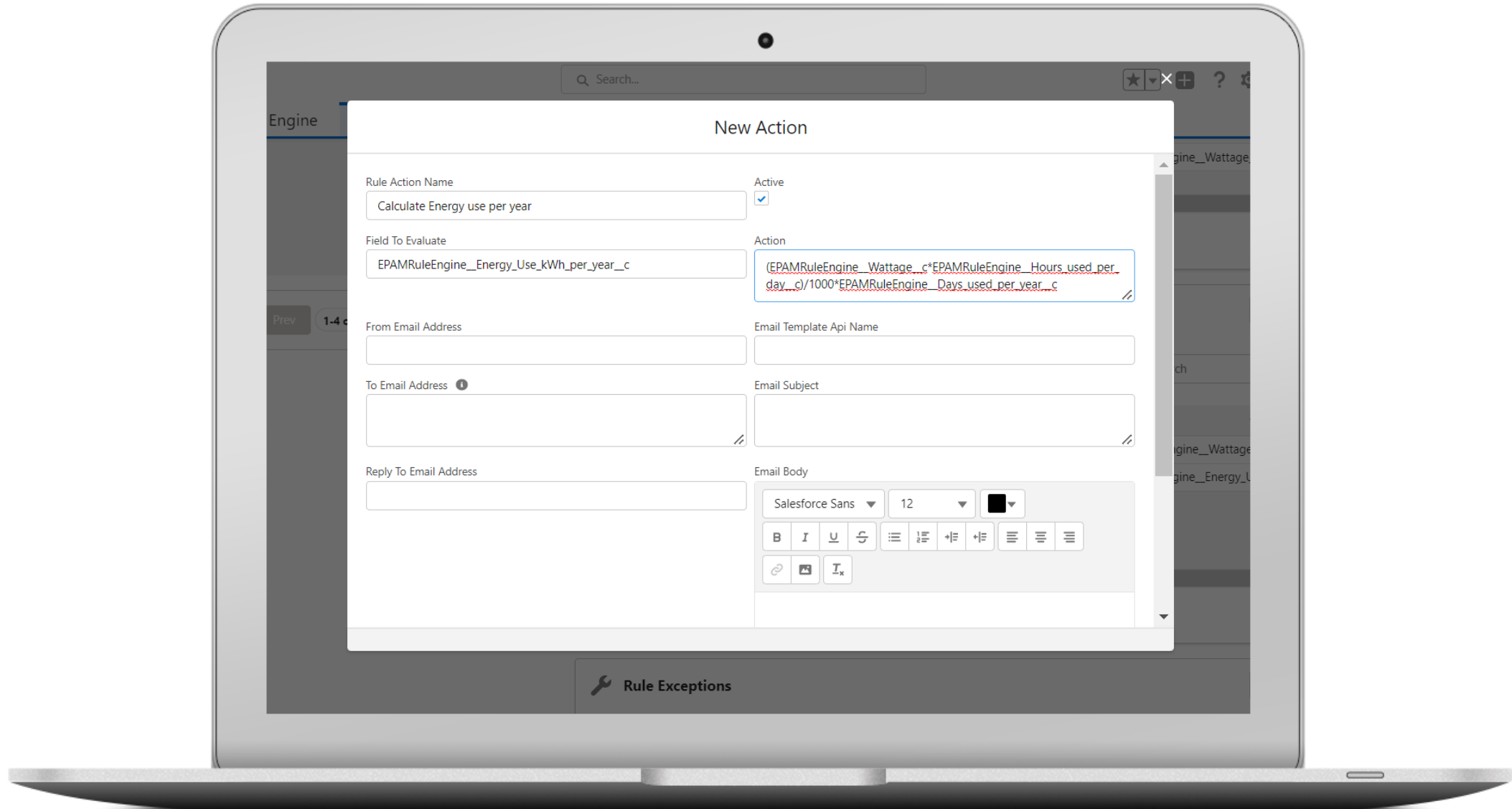
Configuration of Rule Action (1/2)

The screenshot displays the 'Rule Configuration' interface for 'Rule RE-Sample11'. The interface is divided into several sections:

- Filter Rules:** Includes filters for 'Is Active' (set to '--None--'), 'Execution Type' (set to '--None--'), and 'Rule Type' (set to '--None--'). An 'Apply Filter' button is present.
- Rule Criteria:** A table listing criteria for 'RE-Sample11'. It includes columns for 'Rule Criteria Name', 'Active' status, 'Sequence', and 'Eligibility Criteria'. The criteria listed are:
 - Utility Rate should be greater than zero. (Sequence 4)
 - Days used per year should be greater than zero. (Sequence 3)
 - Hours used per day should be greater than zero. (Sequence 2)
 - Wattage should be greater than zero. (Sequence 1)
- Rule Actions:** A table listing actions for 'RE-Sample11'. It includes columns for 'Rule Action Name', 'Active' status, 'Field To Evaluate', and 'Action'. The actions listed are:
 - Calculate Energy use per year. (Field: EPAMRuleEngine__Energy_Use_kWh_per_year__c)
 - Calculate Cost per year. (Field: EPAMRuleEngine__Cost_per_year__c)
- Rule Exceptions:** A table listing exceptions for 'RE-Sample11'. It includes columns for 'Rule Exception Name', 'Active' status, 'Sequence', and 'Eligibility Criteria'. The exception listed is:
 - Utility rate should be greater than zero. (Sequence 4)

A red box highlights the 'New' button in the 'Rule Actions' section, with a tooltip that reads 'Configure rule actions immediately'.

Configuration of Rule Action (2/2)

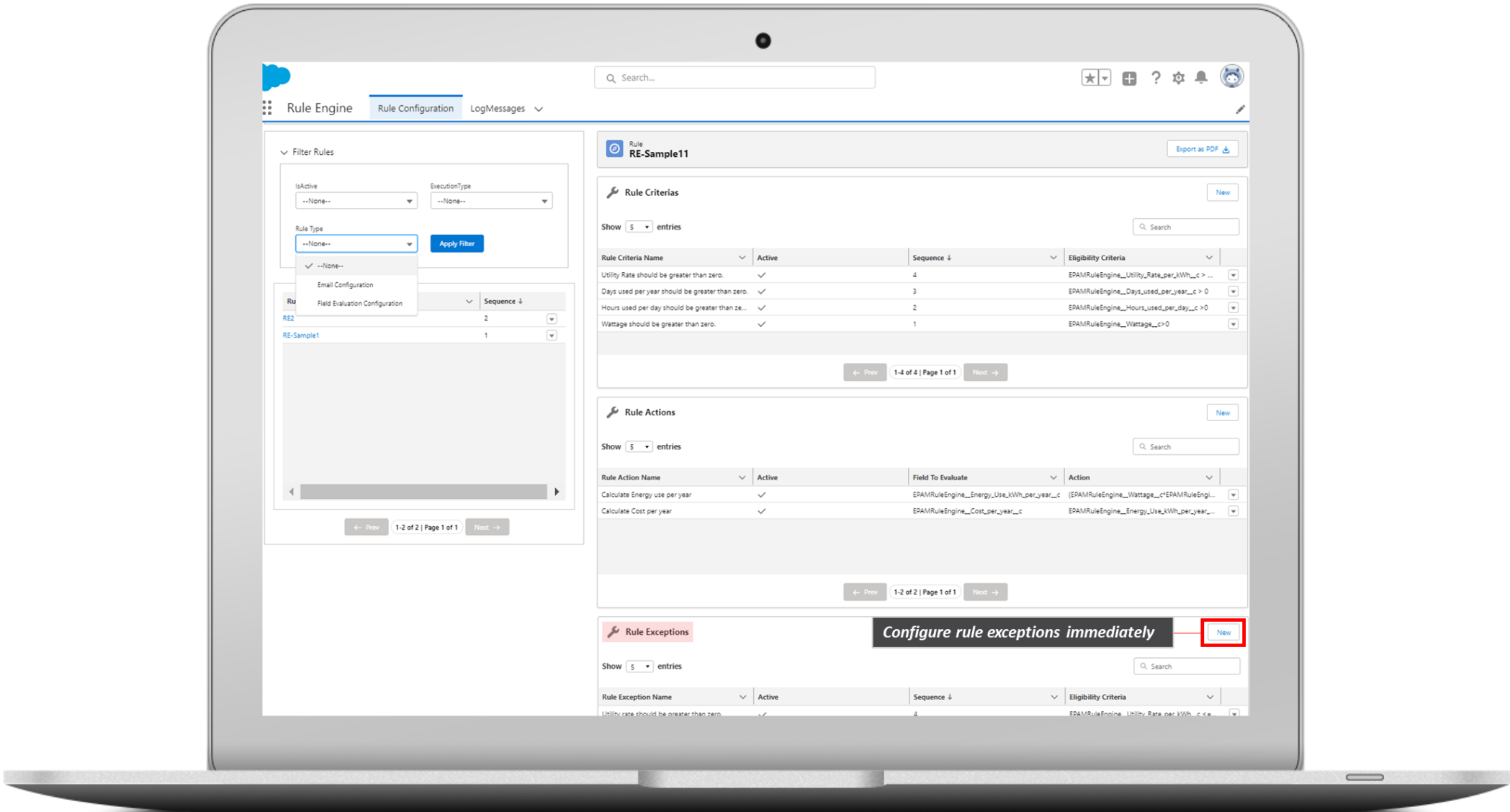


The screenshot shows a laptop screen with a web application interface. A modal window titled "New Action" is open, displaying the configuration for a new rule action. The background interface includes a search bar at the top and a sidebar on the left with the word "Engine" visible. The modal window contains the following fields and options:

- Rule Action Name:** A text input field containing "Calculate Energy use per year".
- Active:** A checkbox that is checked.
- Field To Evaluate:** A text input field containing "EPAMRuleEngine_Energy_Use_kWh_per_year_c".
- Action:** A text area containing the formula:
$$\frac{EPAMRuleEngine_Wattage_c * EPAMRuleEngine_Hours_used_per_day_c}{1000 * EPAMRuleEngine_Days_used_per_year_c}$$
- From Email Address:** An empty text input field.
- Email Template Api Name:** An empty text input field.
- To Email Address:** An empty text input field with an information icon.
- Email Subject:** An empty text input field.
- Reply To Email Address:** An empty text input field.
- Email Body:** A rich text editor with a toolbar showing "Salesforce Sans", font size "12", and various formatting icons (bold, italic, underline, link, unlink, bulleted list, numbered list, indent, outdent, align left, align center, align right, justify, decrease indent, increase indent, link, unlink, insert image, insert video, insert link, insert unlink).

At the bottom of the modal window, there is a "Rule Exceptions" section with a wrench icon.

Configuration of Rule Exceptions (1/2)



Configuration of Rule Exceptions (2/2)

The screenshot displays a web application interface for configuring rule exceptions. A modal dialog titled "New Exception" is open, allowing the user to define a new exception. The dialog includes the following fields:

- Rule Exception Name:** A text input field containing "Utility rate should be greater than zero."
- Sequence:** A text input field containing the number "4".
- Active:** A checkbox that is currently checked.
- Eligibility Criteria:** A text area containing the expression `EPAMRuleEngine__Utility_Rate_per_kWh_c <= 0.00`.
- Exception Message:** A text input field containing "Utility rate should be greater than zero."
- Rule:** A dropdown menu showing the selected rule "RL-001047".

At the bottom of the dialog are "Save" and "Cancel" buttons. The background application shows a table of existing rule configurations:

Rule Name	Sequence	Rule ID
Calculate Energy use per year	✓	EPAMRuleEngine__Energy_U...
Calculate Cost per year	✓	EPAMRuleEngine__Cost_per...
Hours used per day should b...	✓	2
Wattage should be greater t...	✓	1

Available Rules within the Object

The screenshot displays the EPAM Rule Engine interface for configuring rules. The 'Filter Rules' panel on the left allows filtering by 'Is Active' and 'Execution Type'. The 'Rule Criteria' table lists criteria for 'RE-Sample11' with columns for 'Active', 'Sequence', and 'Criteria'. The 'Rule Actions' table lists actions for the same rule. The 'Rule Exceptions' table lists exceptions. Annotations highlight various features:

- Sort out rules with filters:** Points to the 'Apply Filter' button in the 'Filter Rules' panel.
- Sort out order:** Points to the 'Sequence' column header in the 'Rule Criteria' table.
- See the full list of rules for the object:** Points to the 'RE-Sample11' rule name.
- List pages:** Points to the pagination controls at the bottom of the 'Rule Criteria' table.
- Get full list of rules in .pdf:** Points to the 'Export as PDF' button.
- Configure rules immediately:** Points to the 'New' button.

Rule	Active	Sequence	Criteria
Utility Rate should be greater than zero.	✓	4	EPAMRuleEngine__Utility_Rate_per_KWh_c > 0
Days used per year should be greater than zero.	✓	3	EPAMRuleEngine__Days_used_per_year_c > 0
Hours used per day should be greater than zero.	✓	2	EPAMRuleEngine__Hours_used_per_day_c > 0
Wattage should be greater than zero.	✓	1	EPAMRuleEngine__Wattage_c > 0

Rule Action Name	Active	Field To Evaluate	Action
Calculate Energy use per year	✓	EPAMRuleEngine__Energy_Use_KWh_per_year_c	(EPAMRuleEngine__Wattage_c * EPAMRuleEngine__Hours_used_per_day_c * EPAMRuleEngine__Days_used_per_year_c) / 1000
Calculate Cost per year	✓	EPAMRuleEngine__Cost_per_year_c	EPAMRuleEngine__Energy_Use_KWh_per_year_c * EPAMRuleEngine__Cost_per_KWh_c

Rule Exception Name	Active	Sequence	Eligibility Criteria
Utility rate should be greater than zero.	✓	4	EPAMRuleEngine__Utility_Rate_per_KWh_c < 0

Rule Execution within Sample Record

The screenshot displays the Salesforce Rule Engine interface for a specific rule sample, RESN-0000002. The interface is divided into several sections:

- Header:** Includes the Salesforce logo, a search bar, and navigation tabs for Rule Engine, Rule Configuration, LogMessages, and a dropdown for the current rule sample (RESN-0000002).
- Related Details:** A section on the left containing input fields for rule parameters:
 - RE Sample Number: RESN-0000002
 - Owner: [User Avatar]
 - Wattage: 11
 - Days used per year: [Redacted]
 - Hours used per day: 13Below these are calculated fields:
 - Utility Rate(\$ per kWh): 0.12
 - Energy Use(kWh) per year: 0.000
 - Cost per year(\$): 0.000At the bottom, it shows 'Created By' (6/18/2021, 2:17 AM) and 'Last Modified By' (8/11/2022, 2:53 AM).
- Annotations:** Two black boxes with red arrows pointing to the 'Days used per year' and 'Energy Use(kWh) per year' fields. The first box is labeled 'Entered figures' and the second is labeled 'Calculations based on rule'.
- Rule Exception Messages:** A panel on the right with a title bar and an 'Override' button. It contains a section for 'Exception Message' with a dropdown menu showing 'Days used per year should be greater than zero.'.
- Activity & Error Message:** A section at the bottom right with tabs for 'Activity' and 'Error Message'. The 'Error Message' tab is active, showing filters (All time, All activities, All types) and a message: 'No activities to show. Get started by sending an email, scheduling a task, and more. No past activity. Past meetings and tasks marked as done show up here.'

Review of Error Messages

The screenshot displays the Salesforce Rule Engine interface, specifically the LogMessages section. A red box highlights the 'LogMessages' tab in the top navigation bar. Below the navigation bar, there is a 'Check for error details' button. The main content area shows a list of 50+ items, sorted by Created Date, filtered by All logmessages. The list contains 19 visible entries, each with a checkbox, a Log Message ID (EX-03...), Log type (Applicati...), De... (Error), Last Modified Date, Log Message (Message: TestMethod Exception Typ...), Created Date, Log Source (RuleEngineHandl...), and Log Source Functi... (expressionEvaluation).

	LogM...	Log type	De...	Last Modified Date	Log Message	Created Date	Log Source	Log Source Functi...
1	EX-03...	Applicati...	Error	6/22/2022, 7:19 AM	Message: TestMethod Exception Typ...	6/22/2022, 7:19 AM	RuleEngineHandl...	expressionEvaluation
2	EX-03...	Applicati...	Error	6/22/2022, 7:19 AM	Message: TestMethod Exception Typ...	6/22/2022, 7:19 AM	RuleEngineHandl...	expressionEvaluation
3	EX-03...	Applicati...	Error	6/21/2022, 11:29 PM	Message: TestMethod Exception Typ...	6/21/2022, 11:29 PM	RuleEngineHandl...	expressionEvaluation
4	EX-03...	Applicati...	Error	6/21/2022, 11:29 PM	Message: TestMethod Exception Typ...	6/21/2022, 11:29 PM	RuleEngineHandl...	expressionEvaluation
5	EX-03...	Applicati...	Error	6/21/2022, 11:20 PM	Message: TestMethod Exception Typ...	6/21/2022, 11:20 PM	RuleEngineHandl...	expressionEvaluation
6	EX-03...	Applicati...	Error	6/21/2022, 11:20 PM	Message: TestMethod Exception Typ...	6/21/2022, 11:20 PM	RuleEngineHandl...	expressionEvaluation
7	EX-03...	Applicati...	Error	6/21/2022, 10:31 PM	Message: TestMethod Exception Typ...	6/21/2022, 10:31 PM	RuleEngineHandl...	expressionEvaluation
8	EX-03...	Applicati...	Error	6/21/2022, 10:31 PM	Message: TestMethod Exception Typ...	6/21/2022, 10:31 PM	RuleEngineHandl...	expressionEvaluation
9	EX-03...	Applicati...	Error	6/21/2022, 10:17 PM	Message: TestMethod Exception Typ...	6/21/2022, 10:17 PM	RuleEngineHandl...	expressionEvaluation
10	EX-03...	Applicati...	Error	6/21/2022, 10:17 PM	Message: TestMethod Exception Typ...	6/21/2022, 10:17 PM	RuleEngineHandl...	expressionEvaluation
11	EX-03...	Applicati...	Error	6/17/2022, 5:52 AM	Message: TestMethod Exception Typ...	6/17/2022, 5:52 AM	RuleEngineHandl...	expressionEvaluation
12	EX-03...	Applicati...	Error	6/17/2022, 5:52 AM	Message: TestMethod Exception Typ...	6/17/2022, 5:52 AM	RuleEngineHandl...	expressionEvaluation
13	EX-03...	Applicati...	Error	6/15/2022, 11:59 PM	Message: TestMethod Exception Typ...	6/15/2022, 11:59 PM	RuleEngineHandl...	expressionEvaluation
14	EX-03...	Applicati...	Error	6/15/2022, 11:59 PM	Message: TestMethod Exception Typ...	6/15/2022, 11:59 PM	RuleEngineHandl...	expressionEvaluation
15	EX-03...	Applicati...	Error	6/15/2022, 11:58 PM	Message: TestMethod Exception Typ...	6/15/2022, 11:58 PM	RuleEngineHandl...	expressionEvaluation
16	EX-03...	Applicati...	Error	6/15/2022, 11:58 PM	Message: TestMethod Exception Typ...	6/15/2022, 11:58 PM	RuleEngineHandl...	expressionEvaluation
17	EX-03...	Applicati...	Error	6/15/2022, 11:51 PM	Message: TestMethod Exception Typ...	6/15/2022, 11:51 PM	RuleEngineHandl...	expressionEvaluation
18	EX-03...	Applicati...	Error	6/15/2022, 11:51 PM	Message: TestMethod Exception Typ...	6/15/2022, 11:51 PM	RuleEngineHandl...	expressionEvaluation
19	EX-03...	Applicati...	Error	6/15/2022, 11:40 PM	Message: TestMethod Exception Typ...	6/15/2022, 11:40 PM	RuleEngineHandl...	expressionEvaluation



Thank You!

User Guide

