

# Distribution Engine

by nc.squared



salesforce

**PARTNER**  
SINCE 2011

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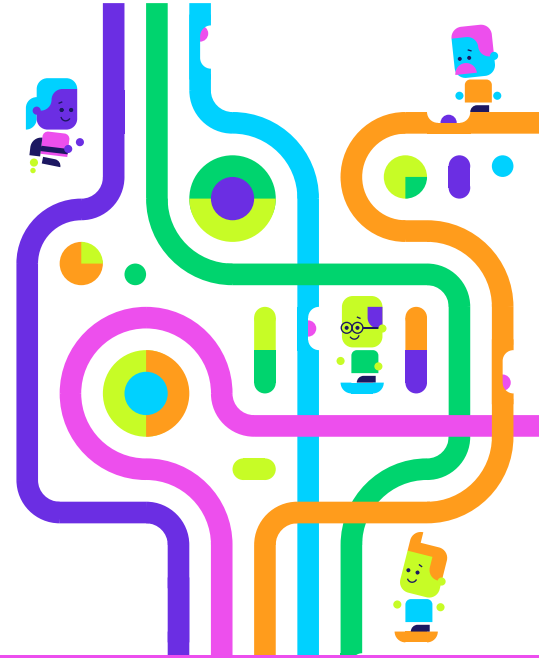
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# Assignment made easy

Distribution Engine is a market leading application for routing and assigning work in Salesforce®.

We make assigning any object easy, help automate and monitor your assignment workflow and streamline your team performance.



## Classify & Convert

- Create territories from zip codes, states or countries & automatically stamp records as they arrive based on that geography. Use tags to ensure the work is assigned to the right team member covering a territory.
- Check whether incoming Leads match to existing Leads, Contacts or Accounts using matching rules that can include exact or fuzzy comparison.
- Based on your business processes, automatically de-duplicate or convert Leads to new Accounts, Contacts or Opportunities, or merge with existing records.



## Distribute

- Configure automatic assignment based on what you consider to be fair or best for your business, using methods such as round robin, load balancing, sticky assignment or related owner. Assign objects individually or as a package of work including parent & child objects.
- Ensure records reach the right people by utilizing tags to dynamically match territories, skills, languages or any other attribute. Make use of working hours and out of office to guarantee records are only assigned to available team members and configure notifications to alert them on assignment.
- Make sure your team members are not overworked or underutilized by using weighting and caps to distribute fairly or with intentional bias for higher performers, experience, complexity or workload.
- Allow team members to request top-up work while still following distribution rules, monitoring performance and tracking outcomes.

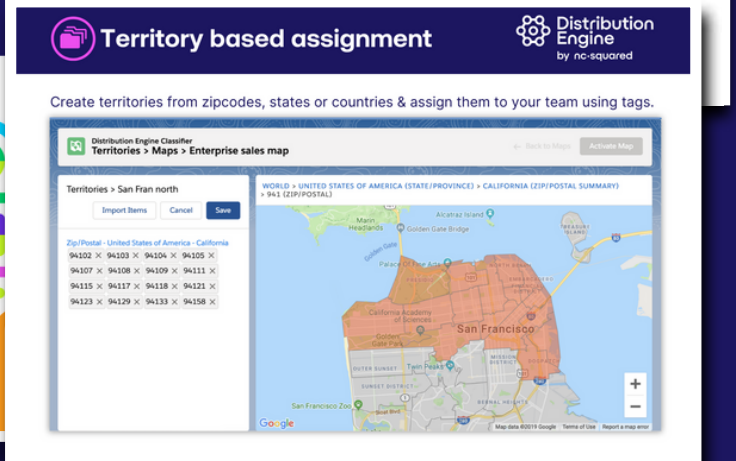
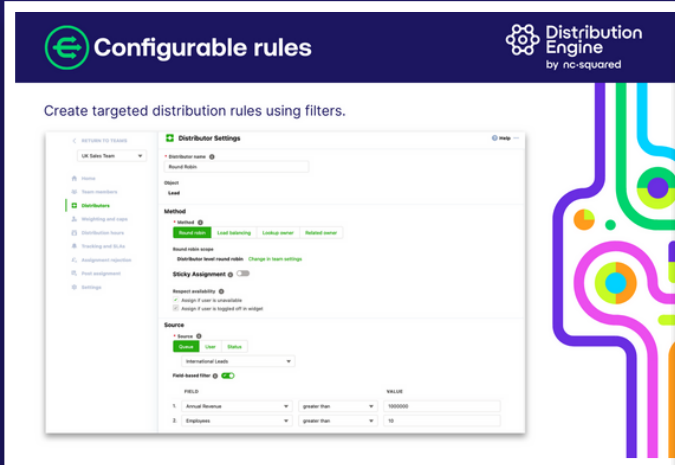
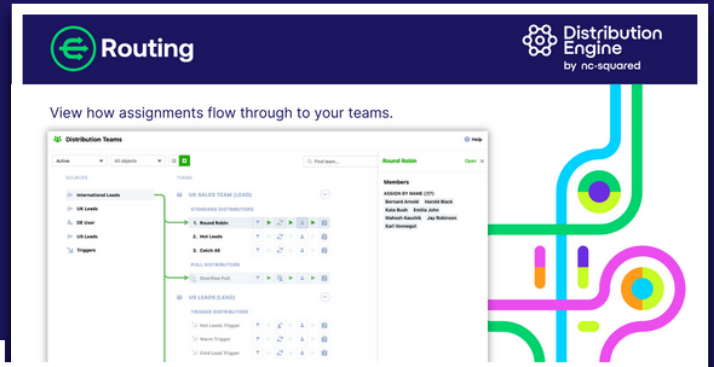


## Track & Report

- Automatically track follow-up actions on records that have been assigned. Report on these or use along with other metrics such as close or conversion rate, to assign tags to enable performance based distribution.
- Configure SLAs to raise alerts or automatically reassign records when specified actions are not completed within set timeframes.
- All distribution actions are logged and can be viewed in-app along with out-of-the-box analytics on volumes or performance. Use the data to set up or extend your own custom Salesforce reports and dashboards.





# Stay in control with Distribution Engine

An increasing volume of work to assign can cause an unnecessary burden on operational teams whose time could be better utilized. Manually assigning records is obviously time consuming and even simple rules for distribution are difficult to automate and maintain. As businesses evolve, grow and look to improve, the rules inevitably change and become increasingly more complex. Distribution Engine is powerful and easy to set up and maintain. This enables automation of complex distribution scenarios giving control to the business users who need it.



Enrich your records and get them to the right people at the right time; monitor and refine the process and report on key metrics. Assign based on geography, skill, spoken language or any other criteria you wish. Use round robin or load balanced limits with weighting and capping to ensure that work is spread among your teams in line with your requirements. Automatically track and alert on assignments, actions and SLAs. Use reporting and analytics to see trends so you can respond accordingly.

## Other Benefits

-  **Salesforce Native** - meaning data stays within your Salesforce org and no reliance on third-party services.
-  **APIs & Integration** - use our APIs to trigger DE from your other business processes or integrate us with apps like Marketo.
-  **Easy Configuration** - designed for business users to be able to configure what they need to achieve their goals.
-  **Customer Success Included** - from onboarding to your ongoing configuration needs. If you need any help with setting things up, or have additional requirements, let us know!

## Real world success

"The app, when used to its full potential, is likely to give an edge to any sales organization that is serious about servicing prospective clients in a timely manner."

**Veronique, Sales Ops, Kareo**

"More than this app being an awesome one, I must mention about the even more awesome customer service."

**Gowrishankar, App Architect at Infosys Limited**

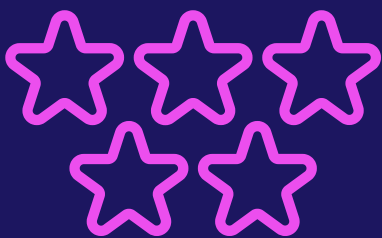
"We've been using Distribution Engine for 4 years and couldn't live without it. The DE tool's Load Balancing feature has been a game changer for our Sales Ops! We also use it to round robin Accounts, which drives all our BDR's personal dashboards."

**Jamie, Solutions Architect at Venminder**

## GET STARTED WITH A FREE TRIAL

For a demo or more information, drop us an email at [hello@nc-squared.com](mailto:hello@nc-squared.com) and we'll be happy to help.

For a free 30 day trial go to [distribution-engine.com](https://distribution-engine.com) and click 'Get It Now' to install.



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