

# COE Intake- BRE Documentation

## Objective

Document BRE design and logic for making platform recommendations.

## Decision Matrix -

COE Intake Decision Matrix is uploaded under docs in the Github Repo.

*The input/output of the decision matrix can be modified based on your specific requirements and needs.*

**Description:** The COE Intake Matrix outlines all the different permutations of the input parameters with the respective output. The following fields from Intake records are the input parameters:

- Is business process automations needed
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe\_Review\_Score\_Automations\_\_c)
  - A roll-up summary field calculates a total value (API Name: coe\_Total\_Automations\_\_c)
  - \*An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe\_Avg\_Automations\_\_c)
- Recommendation
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe\_Review\_Score\_Recommendation\_\_c)
  - A roll-up summary field calculates a total value (API Name: coe\_Total\_Recommendation\_Value\_\_c)
  - \*An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe\_Avg\_Recommendation\_Value\_\_c)
- Does an App for this Use Case exist
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe\_Review\_Score\_App\_Exists\_\_c)
  - A roll-up summary field calculates a total value (API Name: coe\_Total\_App\_Exists\_Value\_\_c)
  - An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe\_Avg\_App\_Exists\_Value\_\_c)
- Does Platform support Integration needs
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe\_Review\_Score\_Integration\_\_c)
  - A roll-up summary field calculates a total value (API Name: coe\_Total\_Integration\_Needs\_\_c)
  - An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe\_Avg\_Integration\_Needs\_\_c)
- Does the use case need collaboration
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe\_Review\_Score\_Collaboration\_\_c)
  - A roll-up summary field calculates a total value (API Name: coe\_Total\_Collaboration\_Need\_\_c)
  - An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe\_Avg\_Collaboration\_Need\_\_c)
- Is Mobile Access needed
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe\_Review\_Score\_Mobile\_Access\_\_c)
  - A roll-up summary field calculates a total value (API Name: coe\_Total\_Mobile\_Access\_\_c)
  - An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe\_Avg\_Total\_Mobile\_Access\_\_c)

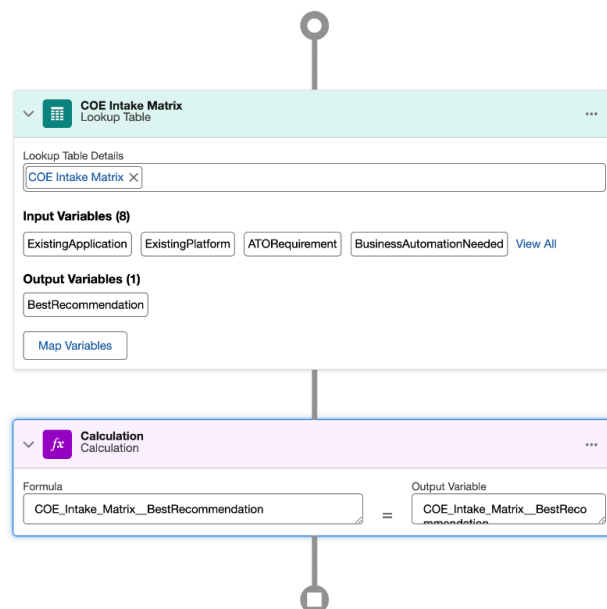
- Can this App use an existing platform
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe\_Review\_Score\_Existing\_Platform\_\_c)
  - A roll-up summary field calculates a total value (API Name: coe\_Total\_Existing\_Platform\_\_c)
  - An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe\_Avg\_Total\_Existing\_Platform\_\_c)
- Will an ATO be required
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe\_Review\_Score\_ATO\_\_c)
  - A roll-up summary field calculates a total value (API Name: coe\_Total\_ATO\_\_c)
  - An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe\_Avg\_ATO\_\_c)

\*Input parameters for BRE.

## **Expression Set (API Name: COE\_Intake\_Decision\_Matrix)**

\*Please note that you do not need an expression set for this specific scenario. You can directly call the decision matrix into your omniscript. However, the goal of this accelerator is to show how an omniscript can leverage an expression set.

This expression set is very simple as it does not perform any calculations, but rather has a Lookup table with a calculation with the output parameter of the Lookup table.



## **Omniscript- COE/BRERecommendation**

This Omniscript is composed of the following components:

- Data Raptors
  - COEIntakeExtractDR: This data raptor is extracting the Intake record and input parameters for the expression set
  - COEBREInputTransformDR: This data raptor is transforming output parameters from the expression set (JSON) into a legible format
- Expression Set (API Name: COE\_Intake\_Decision\_Matrix)
- Step (COE\_BREOutput)
  - The Step is displaying the output from the expression set along with the Preferred Platform from the Intake record.
- The Navigation Action at the end allows you to restart the Omniscript for recalculations if there are any changes to the input parameters

The screenshot displays the Salesforce Omniscript Builder interface. At the top, a table lists the components:

Type	SubType	Language	Version	Active	Description
COE	BRERecommendationv1	English	1	true	

The main workspace shows a sequence of actions in a flow:

- COEIntakeExtractDR** (DataRaptor Extract Action)
- COEExpressionSetAction** (Expression Set Action) - This action is currently selected and highlighted with a blue border.
- COEBREInputTransformDR** (DataRaptor Transform Action)
- COE\_BREOutput** (Step) - This step displays the output of the expression set. It shows the text "Business Rules Engine Recommendation" followed by two lines of output: "Best Recommendation: %BREBestRecommendation%" and "Best Match: %PreferredPlatform%". A "Refresh" button is located at the bottom right of this step.
- RestartOmniscrypt** (Navigate Action)

On the right side, the "Properties" panel is open for the selected "COEExpressionSetAction". It shows the following settings:

- NAME**: COEExpressionSetAction
- Field Label**: COEExpressionSet
- REMOTE PROPERTIES**: (Collapsed)
- USER MESSAGE**: (Collapsed)
- SEND/RESPONSE TRANSFORMATIONS**: (Collapsed)
- ERROR MESSAGES**: (Collapsed)
- MESSAGING FRAMEWORK**: (Collapsed)
- CONDITIONAL VIEW**: (Collapsed)
- LWC Component Override**: (Empty field)
- Internal Notes**: (Empty field)

The "Build" tab is active, and the "Lightning" theme is selected. The "Hide Conditional Elements" checkbox is unchecked.