

Behind the scenes: See how **Distro** works!

We'll show you how Distro works and is intended to work. This document explains the fundamentals of the product as well as key use cases. Let's start!



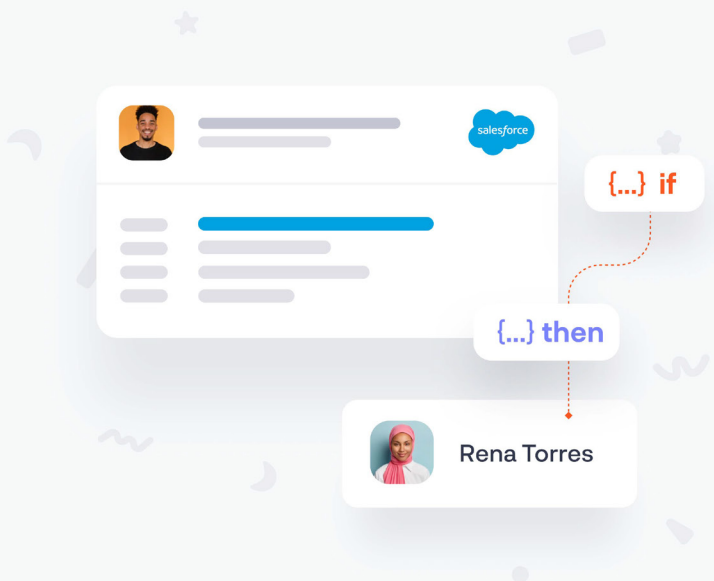
Streaming Service

At the most basic level, Distro **subscribes** to messages from Salesforce to trigger routes.

We leverage an application called CRM streaming. This allows us to receive events from Salesforce in the form of PUSH topics.

The PUSH topic entity is a subscription which you can define by specifying a query:

Hey Salesforce, tell me when a lead status changes.



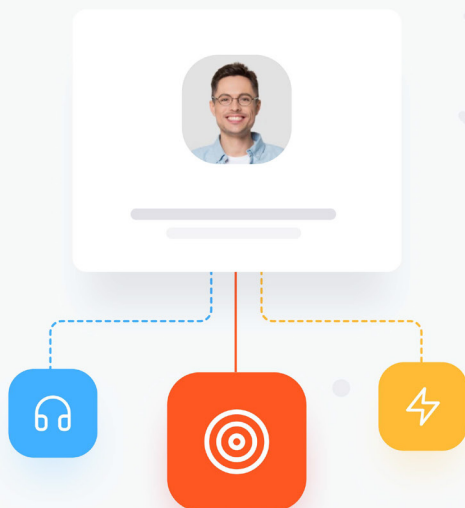
Push Topics

Push Topics (PT) are an SFDC mechanism that allows streaming the data that we need. When crm-streaming receives the configuration parameters from the main application, we create (or update) PushTopic[s] on behalf of the current user.

Objects Distro currently works with:

- Account
- Case
- Opportunity
- Contact
- Lead

We do not support custom objects at this time.



{...} if company size...

{...} and country equals...

Trigger

What Chili Piper is “listening” to to initiate running through the CRM Router.

{...} Then assign lead to...



Nicolas Jason
Account Executive

A trigger can happen off of:

1. **New Record:** A new record is entered into your Salesforce instance (e.g. lead).
2. **Field Update:** When a field is updated to either a specific value or to any value depending on the router configuration set. event=updated + change in the value (not only having the field=value).

Within a trigger you can have two additional settings:

1. **Record Evaluation:** Essentially serves as a filter to run through the routes (in purple in screenshot below).
2. **Delay:** Stalls the routing of records, typically to allow data enrichment to process (in purple in screenshot below).

The order of operations is:

Trigger successful → Record Evaluation successful → Delay configured times out

CRM Router / X-Sell CS Assignment - Case

Active

Changes saved

Publish changes

TRIGGER

New Record

Case

ROUTES

Assignment Ruleset - Cross-Sell CSM - Case

1

CS Owner

CS - All CSMs

Update Ownership Field

2

CS - SMB - NA

CS - SMB - NA - X-sell

Update Ownership Field

3

CS - SMB - EMEA

CS - SMB - EMEA - X-sell

Update Ownership Field

4

CS - MM - NA

CS - MM - NA - X-sell

Update Ownership Field

5

CS - MM - EMEA/APAC

CS - MM - EMEA - X-sell

SERVICE LEVEL AGREEMENTS

+ Add Service Level Agreement

Trigger

Trigger Event

Set when Chili Piper should check your CRM records for new data.

Field Update

When a specific field is updated.

New Record

When a record of a certain type is created.

Object

Case

Record Evaluation

Set which conditions must be true on the record to trigger the Router.

Enabled

X-Sell Case Assignment

Case.Type is any of Cross-Sell Onboarding, Distro Trial AND Case.OwnerId is equal 0056T000007dkmVQAQ

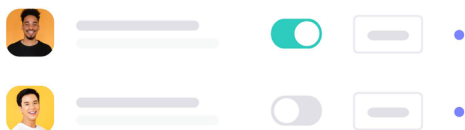
Change

Delay

Optionally set the amount of time to wait before routing and assignment.

Enabled

1 minutes



Note:

If you do not add an action, you will be blocked from publishing the router.

Route

Rule and Team are combined with an ownership field action to tell us what to update on the record. In order to create a route, you must add an assignment ruleset to the router and then select an action. When you are setting up the ownership fields, you are able to do cross object updates. This means an opportunity was the trigger but you update an Account field or the Account was the trigger and you update the case.

What else is happening in the background?

1. Lead to Account Matching

Distro has lead to account matching which allows you to route EXISTING leads to an account in the salesforce system. Matching is the same as in the rest of our app in that we match to the account with the most number of contacts who have matching email domains. If no contacts exist, then we go off of the account's website.

You can route off of lead AND account rules at the same time.

For example:

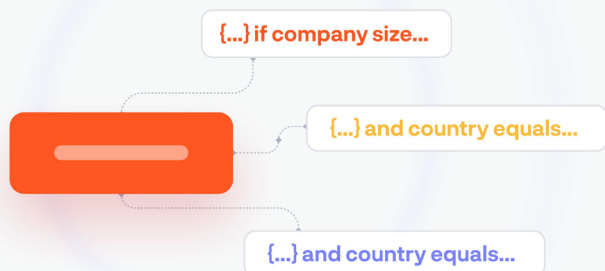
Lead = contacted **AND** Account Owner = Assignee Email Address

2. Vacation Calibration

Given our ability to read the calendar, we have vacation calibration for Distro routing. If a rep is OOO (all day events), we will not route records to them as part of the team. If ALL reps in a team are OOO, we will continue routing to avoid delays.

Publish button

Once you have configured your router there is a Publish button which must get clicked. This will also sync the CRM if needed.



Common use cases



Lead

Custom Field (MQL) updated to true



Lead

Status updated to Contacted



Contact

Pardot Score greater than or equal to 100



Lead

Assign account managers (AMs) and customer success managers (CSMs) to new accounts



Lead

OwnerID is updated to insert owner id of salesforce queue



Opportunity

Stage is updated to Won, Record Eval, Type = New Biz
Updating the owner of a related object

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