

Round Robin Lead Assignment Setup and User Guide

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Introduction

Round Robin Lead Assignment (RRLA) is the most customizable Round Robin Lead Assignment solution available on the Salesforce Appexchange. Multiple Round Robin assignment groups are supported with filtering by Country, US States/Canadian Provinces, and ANY lead picklist fields - standard or custom. RRLA works with all lead channels including web to lead, Marketing integration leads, the Salesforce User Interface (UI) or mass imported leads. Setup and group membership is flexible and easy to maintain.

Flexible: Supports multi Round Robin Assignment groups with the ability to use custom fields for matching.

Robust: Flag which leads should be assigned by RRLA from any lead channels including Web-to-Lead, Marketing integration leads, the Salesforce UI or mass imported leads.

Easy To Use: Simple to set up, use, and monitor.

Getting Starting with RRLA

How Does RRLA Work

Using the Round Robin (RR) Assignment Object, set up one or more RR Assignments. A Round Robin Assignment defines matching criteria for Leads and Group Members. Leads that match an assignment are distributed to the related Group Members using an equal round robin distribution. Both Text and State/Country Picklist settings are supported. The RR Assignment object is already configured with Countries and US States/Canadian Provinces for matching by default. In addition, if State and Country picklists are not enabled, synonyms are supported to handle the different variations for US Country (ex: United States and USA). Any other standard or custom single select picklist Lead field can be used for matching. Matching fields are easily configured using the Round Robin Setup Tab.

Each Round Robin Assignment has Round Robin Group Members who will receive leads when a match is made to that Assignment. A Round Robin Group Member can be temporarily deactivated. The Member Order is used to determine the order in which the Group Members will receive leads. Assignees can receive a notification when a lead is assigned to them. An optional setting can be used to always call the Standard Lead Assignment rule after RRLA. If no Round Robin assignment match is found, then the Standard Lead Assignment will assign the lead.

RRLA works with leads from any channel - web to lead, Salesforce UI, batch loads including leads from the API and marketing integrations. RRLA can be easily configured to work with all leads or a subset of leads by record type. There is also a button to invoke RRLA manually on a single lead for reassignment.

What Do You Need to Know

Setting up RRLA assumes basic knowledge of Salesforce custom objects, field configuration, and custom settings.

With the FREE version of RRLA, 2 Active Round Robin Assignments, 2 custom matches (standard or custom lead fields), and up to 10 Round Robin group members are allowed. [Contact Janati](#) or email sales@janaticonsulting.com to upgrade to the paid version with higher limits.

If your organization has questions on best practices for Lead Processes or the need for a custom solution for leads or account management, [Janati Consulting](#) may be able to help you.

Janati recommends using State and Country picklists for best results for lead assignment and reporting in general. If your organization is still using text fields, consider making a change as it allows for cleaner lead data for reporting and assignment.

Planning

To get started, gather details about your Round Robin lead processes to correctly configure and setup the RRLA. Review these planning questions in advance.

Which Leads Should Use Round Robin

Determine if all leads should use Round Robin. Any leads which don't match a RR Assignment entry, will not be assigned an owner by Round Robin. However, there is an optional setting to always call the Lead Assignment rule after Round Robin. Therefore, one option is to use RRLA on all leads, and leads with no match will be assigned by the Lead Assignment Rule. RRLA is called when a new lead is created and the lead field Round Robin is set to 'Yes'. Round Robin is a picklist field so it can be defaulted system wide or by record type. There is also a button that can be used individually on a lead in the Salesforce UI. This button is helpful for any reassignments as well as for testing.

Determine Assignments and Group Members

Work with your Sales and Marketing teams to determine the Assignments and Groups required. An Assignment is a segmentation filtered by Country, State, and/or any standard/custom lead picklist field. Assignments have related Group Members - Salesforce users who will be assigned the leads by the RRLA. A user can be a Group Member in multiple Assignments as each operates independently. Matching using Country, US States, and Canadian Provinces are

supported out of the box. Determine what other Lead single select picklist fields should be used for grouping and distributing leads.

Installation

Round Robin Lead Assignment can be installed from the Salesforce Appexchange. Navigate to <https://appexchange.salesforce.com/> and search by name or provider, Janati LLC.

When prompted for which users to grant access to, we recommended to select System Administration only. Users do not need access permissions to use RRLA with a few exceptions noted below in the configuration. If Sales Operations Users will manage RR Assignments, there are steps in the section [RR Object Visibility](#) on how to grant them appropriate access.

When installation is completed you should see in Installed Applications
Round Robin Lead Assignment

To get started, select Round Robin from the Application drop down in the top right hand corner.

Configuration

Create RR Custom Fields

In the planning phase, the fields to use for RR Assignment should have been determined. Any standard or custom single select picklist fields on the Lead record are supported.

Go to the RR Assignment Custom Object and add the custom fields that will be used for matching to lead fields. Below are a few important notes to keep in mind:

- The fields on the RR Assignment table MUST be created as multi-select picklists so that assignments can include multiple options for matching.
- The picklist values for the RR Assignment fields should match the values in lead fields.
- Changes to picklists will need to be manually updated to fields and Assignments for synchronization.
- While not required, it is best to name fields the same for ease of setting up matching.

The supplied fields Country, US States, and Canadian Provinces are preset with the default ISO standard values when the state and country picklists are enabled in Salesforce. If the Salesforce values are modified from the default, the RR Assignment picklist values will need to be modified to match accordingly. Adding additional values or deleting values is supported but all entries must follow the format, Name (XX), where Name is the text value and XX is a two letter code for the State/Province [For Example, California (CA)]. Any entries not following this format will be disregarded by RRLA. For Salesforce organizations using Text values for State and Country, both Name or XX are considered a match. For State and Country picklists, Name is compared

to the text field and XX to code field respectively (RRLA supports the use of either text or code field passed in API calls).

Round Robin Setup

From the Round Robin application, navigate to the Round Robin Setup Tab.

Round Robin Limits

- Application limits are displayed for Assignments, Matching Fields, and Group Members. [Contact Janati](#) or email sales@janaticonsulting.com to increase limits.

Lead Assignment Rule Setting

- Check the box next to 'Always Call Active Assignment Rule' to always call the Lead Assignment Rule after RRLA is called, regardless of the lead channel.
- Web-to-Lead always calls the Active Lead Assignment Rule. For Leads created by the API and the UI, the setting to call the Lead Assignment Rule is controlled by the user or set in the API call.
- Using this setting is recommended and can help maintain consistent results across all leads.
- If Round Robin fails to find a match, with "Always Call Active Assignment Rule" selected, the Lead Assignment Rule is called and assigns an owner.
- Note: This setting only applies to leads created with Round Robin = 'Yes' or when the Round Robin Assignment button is used. Leads created with Round Robin = 'No' are not affected by the setting.

Lead Matching

- Setup lead matching fields using the drop down selections.
- Only single select standard or custom picklists for leads are available in the lead field drop down.
- Only multi-select picklists for the RR assignment are available in the Round Robin field drop down.
- A field can only be mapped once. A validation error will be displayed if a field is mapped twice on either side.

(OPTIONAL) US Synonyms - Text State/Country Only

Configure Custom Setting for Round Robin US Synonyms

- This setting only applies to organizations where state/country picklists are NOT enabled.
- To check if state and country picklists are enabled, navigate to Setup | Administration Setup: Data Management | State and Country/Territory Picklists

- For organizations using text State and Country fields, you can define an unlimited number of synonyms to match United States (US).
- Navigate to Setup | App Setup: Develop | Custom Settings, and from the custom setting, Round Robin US Synonyms, click on the Manage hyperlink. Then click on the New button. Enter a new custom setting for each synonym with the synonym value in the Name field. United States and US are both already pre-configured in the Round Robin Assignment Country picklist field.
- It is not recommended to add synonyms (additional entries) to the picklist values as this will make setting up Assignments more difficult to maintain.
- Once in place, Round Robin Assignments with 'United States (US)' selected in the Country picklist, will match with Leads with Country equal United States, US, or any of the defined synonyms.

Lead Record Modifications

The RRLA package has 3 Lead Fields and a custom Lead Button. The fields and button do not need to be on the layout but may be appropriate for some users. The button can be used to call Round Robin manually on existing leads. If the Lead Assignment Rule is ever called after Round Robin, an entry in the Lead Assignment Rule is required for RRLA to function correctly.

Lead Field: *Round Robin*

- Round Robin is a picklist field with values of 'Yes' or 'No' with none exhibiting the same behavior as 'No'.
- Set Round Robin to 'Yes' at the field level for all leads to call the Round Robin when a lead is inserted.
- Only select a default at the field level if all leads should be assigned using RRLA. Set the default values by record type to call Round Robin for only some record types.
- Alternatively to call Round Robin for specific sets of leads, set Round Robin to 'Yes' in a web to lead form, in an API call, or in data loaded records.

Note: If Round Robin = 'Yes' as a default, when users create a lead in the UI, the Round Robin assignment will be called. To allow users who create leads in the UI, to remain the owner, there are two options:

- Include the Round Robin field on the page and instruct users to change the field value to 'No'.
- Include the Round Robin field on the page and create an override New button for leads, that in the UI sets Round Robin to 'No' for New Leads.

Standard Lead Field: Assign using Active Assignment Rule

- When the RR setting 'Always Call Active Assignment Rule' is selected from the Round Robin Setup tab, the standard Lead checkbox, 'Assign Using Active Assignment Rule'

does not apply to leads where Round Robin = 'Yes'. It is recommended to remove the standard checkbox from the page layout for all leads calling Round Robin to avoid confusion.

- When the RR setting 'Always call Active Assignment Rule' is not selected, the standard Lead checkbox, 'Assign Using Active Assignment Rule', if selected, does apply to leads where Round Robin = 'Yes'.
- Additionally, for leads where Round Robin = 'No', the standard Lead checkbox, 'Assign Using Active Assignment Rule', if selected, does apply.

Lead Field: *Round Robin Assignee*

- Round Robin Assignee is a lookup field set to the Salesforce User who was assigned the lead the last time Round Robin was called for this lead.
- This field is appropriate on the layout for System Administrator or management.
- It is useful for testing/reviewing the Round Robin assignment process when the lead may have been transferred manually after Round Robin assignment.

Lead Field: *Round Robin Result*

- Round Robin Result is a text field for trouble shooting and is generally not needed on the page layout for standard users.
- This field will be set to the name of the RR assignment that was matched or will contain the text "No Round Robin Match" when no matching Assignment was found by calling Round Robin.

Lead Detail Button: *Round Robin Assignment*

- [Optional] This button can be added to the page layout to manually call Round Robin Assignment on an update of a single lead.
- When this button is clicked, RR Assignment is called for the lead regardless of the setting of the field Round Robin ('Yes', 'No', or none).
- Users using this button must have the Round Robin Apex Class permissions enabled for their profile ([see RR Apex Class](#)).
- Note: no special permissions for users are required for Round Robin to run on lead insert (Round Robin = 'Yes').

Lead Assignment Rule (Standard)

IMPORTANT: Lead Assignment Rule Entry

- To ensure that calling the standard Lead Assignment Rule does not override Round Robin Assignment, create the following entry in the first position in the Active Lead Assignment Rule.
- If you do not have an Active Lead Assignment Rule, create one and add the entry.

- Reminder: Web-to-Lead always calls the Lead Assignment Rule. Other integrations and lead input methods may not. It can be difficult to know with a packaged integration. Setting the RR Setting 'Always Call Active Assignment Rule', yields expected results for all leads calling Round Robin.
- If Round Robin Assignee is set, the Lead Assignment Rule does not change the owner (see below). If a Round Robin Assignee was not set, then the rest of the Standard Lead Assignments Rules will be evaluated to assign an owner.

Action	Order	Criteria	Assign To	Email
Edit Del		Lead: Round Robin Assignee NOT EQUAL TO null	Same User	

- For leads where Round Robin = 'No', the Standard field 'Assign Using Active Assignment Rule' applies.

Lead Owner Notification

There are two RRLA Workflow Rules that send notifications to users when a lead has been assigned via Round Robin.

Activate both the Round Robin Assignment workflow rules.

- Round Robin Assignment** will send an email to the lead owner, when there is a match to the Round Robin assignment on lead insert.
- Round Robin Assignment Changed** will send an email alert to the new lead owner, when there is a change in the assignment by RRLA (using button).

The template **Lead Assignment Notification** is located in the folder **Round Robin Assignment**. Modify the template directly or set the workflow email alerts to select a different template if desired.

RRLA Permissions

Lead Fields

- Standard users do not require Read or Write access to the Lead Fields, Round Robin Assignee or Round Robin Result.
- Users will need Edit access to the field Round Robin, if in the UI they should be allowed to change the setting to 'No' for the purpose of retaining ownership of leads they create in the UI. Otherwise, no access is needed.

RR Object Visibility

- For the two RRLA objects, Round Robin Assignment and Round Robin Group Member, Standard Users do not require any access. Read access could be allowed if it is desired for users to view Assignments. Edit access is not advised for Standard Users since modifications could affect assignments.
- Users tasked with setting up Round Robin Assignments require Create and Edit/Modify Access on both these objects and as well as visibility to the Round Robin Assignment Tab.
- Note: The RR Assignment and RR Group Member Objects have field history enabled. If a user calls Round Robin by inserting or updating a lead, and the user does not have Write access to the RR objects, the changes to 'Last Member Order Number' and 'Last Assignment' are not tracked in field history. The results of Round Robin assignment; however, remain the same and the fields are properly updated. Only history is effected; this is standard Salesforce behavior for history tracking.

RR Apex Class

- For users calling the RR Assignment Button manually on Leads, the System Administrator must enable the profiles for the Apex class, AssignmentController.
- Navigate to Setup | App Setup: Develop | Apex Classes. Select the Class AssignmentController, Select Security, and add all profiles using the RR Assignment button to Enabled Profiles.

Manage Round Robin Assignments

With the configuration complete, the next step is to set up the Round Robin Assignments. Any required custom Lead fields should have been created and mapped in the configuration stage.

- Be sure the custom fields on the RR Assignment object have been added to the RR Assignment page layout and to the Views.
- With the FREE version of RRLA, 2 Active Round Robin Assignments are allowed, each with up to 10 Group Members.

STEP 1: Create Round Robin Assignments

- To create a RR Assignment, select the application Round Robin, navigate to the Round Robin Assignment tab, and click New.

Round Robin Assignment Fields:

Assignment Name - Any text string that helps identify the Assignment.

Order - Order is important and indicates the processing order. A lead will pass through all Active rules until it finds a match and then exit.

Active - The Active flag must be checked or the entry will be ignored. Uncheck Active when setting up new entries or to temporarily disable an entry. Only Active Assignments count towards the limit.

Last Member Order Number - This system field is used by the application for the distribution algorithm. Set the field level security for this field to Read Only, if you want to leave it on the page layout for testing/review.

Country/US States/Canadian Provinces - These 3 matching fields are provided with pre-configured values. Select the picklist values for these fields for RR Assignments segmenting on Country, US States, or Canadian Provinces.

Other Matching Fields - Select picklist values for matches on any custom fields.

STEP 2: Add Round Robin Group Members

- The FREE version of RRLA allows for up to 10 group members on each RR Assignment.
- Use the 'New Round Robin Group Member' button on the Round Robin Group Members related list on the RR Assignment to add Members.

RR Group Member Fields:

Round Robin Assignment - Related RR Assignment set by button.

User Rep - Lookup field to the Salesforce User that should be part of this assignment group.

Assignment Active - Checkbox field set to True to include this Member. Set to False to temporarily stop assigning Leads to this user but retain them in the ordered list.

Member Order - Defines the order of the Group Members for lead assignment.

- If left blank, the new entry will be added to the end of the list.
- To insert a Group Member in the middle of the order, enter in a duplicate number. When saved the list will be re-ordered and the entry placed above the existing duplicate.

Last Assignment - This system field is updated by the Round Robin engine with the last date/time a RR Assignment was made.

The RRLA Engine

Matching

How does a Lead match to a Round Robin Assignment?

- For all Round Robin Assignment fields having no values selected, any values for the Lead record are considered a match.
- For each Round Robin Assignment field where there are 1 or more values selected, the value for the lead record matching field must equal one of the selected values for a match to occur.

Once a Lead matches with a Round Robin Assignment entry, the matching process exits and RRLA assigns the lead.

Assigning Round Robin Lead Owner

- When a RR Assignment match is found, RRLA looks at the RR Group Member related list. RRLA assigns the Lead Owner to the assignee which is the next Group Member using the Member Order field.
 - Group Members with Active = 'False' are skipped.
 - If a Group Member is an Inactive Salesforce User, no assignment is made and next user is selected based on Member Order.
- The Lead field, 'Round Robin Result' is set to the 'Name' field of the RR Assignment match made.
- The Lead field, 'Round Robin Assignee' is also set to the assignee for testing/debugging purposes.
- If the workflow mentioned in the configuration section is turned on, the RR Assignee will receive an Email notification.

Monitoring

- Set up lead reports to file on Leads where Round Robin Result is nonblank, and review values for Round Robin Assignee along with Round Robin Result. Include all fields involved in matching to check if matching is working as desired.
- The tab Round Robin Errors shows entries in the Round Robin Error table for any unexpected errors. Setup a workflow alert to the System Administrator when an entry is created in the table.

How to Reach us

If you are experiencing problems with RRLA, have a question, or a suggestion for additional functionality, Janati Consulting would like to hear from you. Please [log a case](#) or visit us at www.janaticonsulting.com.