

RRLA 2.0 Setup and User Reference Guide

Document Version 2.0

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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, Zip/Postal Code 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 or mass imported leads. Setup and group membership is flexible and easy to maintain. New in version 2.0, separate flags make it easy to control different assignment groups for new leads vs existing leads.

Flexible: Supports multiple Round Robin Assignment groups with the ability to use custom fields for matching. Assign different types of leads at different stages.

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 pre-configured with Countries and US States/Canadian Provinces. Synonyms for text State/Country are supported to handle the different variations for US Country only (ex: United States and USA). The field Zip/Postal Code is provided and the values needed for matching should be populated during setup. Any other standard or custom single/multi picklist Lead field can be used for matching. Match on Blank value for any picklist is also supported. Matching fields are easily configured and matched 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 with Data Loader, leads from marketing integrations, or any API. RRLA can be easily configured to work with all leads or a subset of leads by record type. New in 2.0, there are separate fields to control calling Round Robin on create vs update. The new Reassignment flag greatly increases options available for set up. For example you can now call Round Robin only when a lead has been qualified, for example after processing in Salesforce and assigning value to a field like Region. There is also a Button and Lightning Action to invoke RRLA manually on a single lead for reassignment. Additionally, a mass Reassignment button can be used on leads selected from any standard View.

What Do You Need to Know

Setting up RRLA assumes basic knowledge of Salesforce custom objects, field configuration, and Lead Assignment. If you have any questions setting up RRLA, contact Janati anytime.

With the FREE version of RRLA, 2 Active Round Robin Assignments, 2 custom matches (standard or custom lead fields), and up to 4 Round Robin group members per an assignment 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

Gather details about your Round Robin lead process requirements to correctly configure and setup RRLA. Review these planning questions in advance for best results.

Which Leads Should Use Round Robin

Determine if all leads should use Round Robin. Any leads which don't match a RR Assignment, 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. There are two options for when to call Round Robin. When the lead field Round Robin is set to 'Yes', RRLA is called on Lead Create. Round Robin is a picklist field so it can be defaulted system wide or by record type. The second method is the Round Robin Reassign checkbox field which calls Round Robin on Update. It can be set by Workflow, Process Builder or even a Trigger. There is a Button and Lightning Action that can be used individually on a lead in the Salesforce UI.

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, US State/CA Provinces, Zip/Postal Code and/or any standard/custom lead single/multi 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. Community Partner Users are also supported as Group Members who will be assigned leads. Matching using Country, US States, Canadian Provinces and Zip/Postal Code are supported out of the box. Match if field is blank is also supported as a filter condition. Determine what other Lead picklist fields should be used for grouping and distributing leads. If you need to filter on a non picklist field, consider using workflow or process builder to set picklist values in a shadow field, and then call Round Robin Reassign.

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 filters would have been determined. Any standard or custom picklist (single or multi) 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 custom fields on the RR Assignment table **MUST** be created as multi-select picklists so that assignments can include multiple options for matching.
- Global picklists are supported but not recommended if matching on blank is desired for that field. See below that for blank matching, a special value must be added to the field.
- 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 recommended to name fields the same for ease of setting up matching.

The supplied fields Country, US States, and Canadian Provinces are pre set with the same default ISO standard values set 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).

The Zip/Postal Code field comes prepopulated with a placeholder and should be populated with the values required for your setup. A maximum of 500 Values can be added and up to 100 can be selected at a time for any multi picklist field used as a filter in Assignment.

Blank matching is supported for all Fields using a special string value, **##blank##**. Add this special string as a value to the picklist in setup. When selected in the assignment filter, matching will occur with records where that field is blank.

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. Check with your Integration provider for the details of their calls.
- Using this setting 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.
- Single and Multi select standard or custom picklists for leads are available in the lead field drop down.
- Only custom 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.
- 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 5 leads fields used for controlling and monitoring Round Robin. The fields do not need to be on the layout but may be appropriate for some users. There is also a Button (for Classic) and a Lightning Action that 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. See the Section Lead Assignment Rule (Standard) for setup details.

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. For assignment on update - see Round Robin Reassign - new in 2.0.
- Only select a default at the field level if all leads should be assigned using RRLA. If you use Lead Record Types, any default MUST be set at the Record Type level. Set the default values by record type to call Round Robin for all or 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.

IMPORTANT: Web To Lead

Default picklist values do NOT work with Web to Lead and Round Robin must be set to Yes in a hidden field in the web form

- Find the 15 character id for the Round Robin field by selecting the field in Setup and copying the id from the URL at the top of the page
- The syntax for setting the hidden field is

<input type=hidden name="xxxxxxxxxxxxxxx" id="xxxxxxxxxxxxxxx" value=Yes>
 where xxxxxxxxxxxxxxxxxx is the Salesforce id for the field

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 have any effect as Standard Lead Assignment is always called.
 - In this case, 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'. If Round Robin does not find a match, then the Standard Lead Assignments will apply
 - Additionally, for leads where Round Robin = 'No', the standard Lead checkbox, 'Assign Using Active Assignment Rule', if selected, does apply and Standard Lead Assignment is used.

Lead Field: Round Robin Reassign

- The new Round Robin Reassign checkbox field allows you to reassign a lead on update. You can do this via workflow, Process Builder, the api, data loader, or in the UI.
- Reassign means to assign a lead after it has already been created.
- Depending on how you configure salesforce the create and update could occur in the same transaction.
- There are many use case for Round Robin Reassign - here are two examples.

Use Case 1: Send only Qualified Leads by Status to Round Robin.

Add a Round Robin Assignment for Qualified Leads using Lead Status as a matching field.

Create a multi-select picklist on the RR Assignment object called Lead Status and match this field to Lead Status in the Round Robin Setup Tab. Create an Active RR Assignment

with filter Lead Status = Qualified. Create a workflow to set Lead: Round Robin Reassign = True when Lead Status = Qualified.

Use Case 2: Automatically re-assign Leads when there has been no follow up

Set up time based workflow for any time period after lead is created. Workflow is on create and criteria is Status = New or whatever your default Lead status is. Add an update that sets Round Robin Reassign in 30 days. Lead will be re-assigned if the status is still New in 30 days.

Note:

The Fields Lead: Round Robin and Lead: Round Robin Reassign work independently to allow for easier management. If Round Robin = Yes when a lead is created and then an update in the same transaction sets Round Robin Reassign to True - the lead will call Round Robin twice. This only presents a problem if both calls result in a match. Using Lead Status as a match criteria is a good way to separate when leads will match if you will be using matching on Insert AND on Update. Alternatively, be sure that any workflow/trigger/process that will set Reassign do not run on insert.

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 troubleshooting 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 Field: Round Robin Last Date

- Is stamped with the last time Round Robin was called for that lead
- The date is set even if call to RR resulted in no match.

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 applying 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 Lightning Action: Round Robin Assign

- The Round Robin Assignment button for single reassignment of a lead is now available as a Lightning Component.
- Be sure you have implemented My Domain before deploying the Round Robin Assignment Lightning Component to your Lightning Page Layout.

Round Robin Mass Assignment: List View Button

- Reassigns selected Leads (use the checkbox) regardless of any Round Robin field values
- Does not look at Round Robin or Round Robin Reassign field values
- Round Robin Mass Reassign Permissions
 - User must have write access to all the leads selected
 - Checks and gives error message of the first couple leads that have the wrong permissions
 - No leads are reassigned until all selected have the correct permission

Lead Assignment Rule (Standard)


IMPORTANT: Lead Assignment Rule Entry

Only Required if the Standard Lead Assignment Rule is called

- 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	1	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, action or Reassignment field).

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.
- To Reassign a Lead using the Reassign field, Round Robin Assignment button or Action, write access to the Lead is required.
 - Edit Access to the field Round Robin Reassign is only needed if it is checked directly in the UI.

- To Reassign leads using the Mass Reassign button, Users must have write access to all the leads selected.
 - Checks and gives error message of the first couple leads that have the wrong permissions
 - No leads are reassigned until all selected have the correct permission

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 or Lightning Action 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 4 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 in order until it finds a match and then exit.

Active - The Active flag must be checked or the Assignment 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 (Salesforce ISO defaults). Select the picklist values for these fields for RR Assignments segmenting on Country, US States, or Canadian Provinces.

Zip/Postal Code - This field is provided but not configured with any values. Add your own picklist values. Up to 500 values can be added and 100 selected at a time in a assignment field filter.

Blank Matching - Add the special string, **##blank##** to any picklists where you want to use the criteria is Blank. Select this special string along with any other values for matching.

Multi-Select Lead Picklists - Allows matching of multi select lead picklists fields using the Intersection of values.

For example:

Lead Picklist = A,C

Round Robin = A,B,C or Round Robin = A or Round Robin = C.

All 3 are a match because at least one value from the lead matches one Assignment value.

Exact Match or Subset only matching option is not supported

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

Note: Use filters on a field like Status to create different Round Robin Assignment Groups for New vs. Existing Leads.

STEP 2: Add Round Robin Group Members

- The FREE version of RRLA allows for up to 4 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.

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 with that Assignment.

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.
- The Lead Field, 'Round Robin Last Date' is stamped with the last time Round Robin was called for that lead (date is set even if call to RR resulted in no match).
- On a Reassignment call, all 3 fields, Result, Assignee, and Last Date are all blanked out and reset based on results of new call.
- 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.

Appendix

RRLA 2.0 New Features

RRLA 2.0 comes with some exciting new features!

With the FREE version of RRLA, 2 Active Round Robin Assignments, 2 custom matches (standard or custom lead fields), and up to 4 Round Robin group members per an assignment are allowed.

Increased limits are allowed with an org wide yearly subscription fee based on usage limits for # of Custom Matching Fields, # of Round Robin Assignments and # of Round Robin Group Members.

Round Robin Reassign
Round Robin Mass Assignment - List View Button
Lead Multi-Select Picklist Field Matching
Lead Zip/Postal Code Field Match
Lead Blank Value Matching
Round Robin Assign Lightning Action

Round Robin Reassign

Overview:

The new Round Robin Reassign checkbox field allows you to reassign a lead on update. You can do this via workflow, the api, data loader, or even the UI. Reassign means to assign a lead after it has already been created. Depending on how you configure salesforce the create and update could occur in the same transaction. There are many use case for Round Robin Reassign - here are two examples.

Use Case 1: Send only Qualified Leads by Status to Round Robin.

Add a Round Robin Assignment for Qualified Leads using Lead Status as a matching field. Create a multi-select picklist on the RR Assignment object called Lead Status and match this field to Lead Status in the Round Robin Setup Tab. Create an Active RR Assignment with filter Lead Status = Qualified. Create a workflow to set Lead: Round Robin Reassign = True when Lead Status = Qualified.

Use Case 2: Automatically re-assign Leads when there has been no follow up

Set up time based workflow for any time period after lead is created. Workflow is on create and criteria is Status = New or whatever you default Lead status is. Add an update that Sets Round Robin Reassign in 30 days. Lead will be re-assigned if the status is still New in 30 days.

Note:

The Fields Lead: Round Robin and Lead: Round Robin Reassign work independently to allow for easier management. If Round Robin = Yes when a lead is created and then an update in the same transaction sets Round Robin Reassign - the lead will call Round Robin twice. This only presents a problem if both calls result in a match. Using Lead Status as a match criteria is a good way to separate when leads will match if you will be using matching on Insert AND on Update. Alternatively, be sure that any workflow/trigger/process that will set Reassign do not run on insert.

PLEASE contact Janati for any help with Reassign.

New Lead Fields

Round Robin Last Date - is stamped with the last time Round Robin was called for that lead (date is set even if call to RR resulted in no match).

Round Robin Reassign - this is the new field that works on update only to Reassign. The reassign flag is turned off after Round Robin is called. Setting the Reassign field on insert does NOT run Round Robin on insert, the insert process still uses the **Round Robin** field

Round Robin Engine Field Settings

Before Call:

Engine Sets to blank

- Round Robin Assignee
- Round Robin Result
- Round Robin Last Date

Engine sets

- Round Robin Reassign = False

*previously on using the button, Round Robin Assignee and Round Robin Result were not blanked out before the call so if the button did not find a match, these fields had the previous match; button behavior matches new reassign functionality

After Call:

Lead is assigned/ reassigned

Engine Updates

- Round Robin Assignee
- Round Robin Result
- Round Robin Last Date

Round Robin Mass Assignment - List View Button

Reassigns selected Leads (use the checkbox) regardless of any Round Robin field values

- Does not look at Round Robin or Round Robin Reassign field values

Round Robin Mass Reassign Permissions

- User must have write access to all the leads selected
- Checks and gives error message of the first couple leads that have the wrong permissions
- No leads are reassigned until all selected have the correct permission

Round Robin Assign - Detail Button (Permission Changes)

- Permission were changed on this button that the user must have write access to the lead or an error is displayed and reassignment doesn't occur

Lead Multi-Select Picklist Field Matching

Allow matching of multi select lead picklists fields. Matching uses the Intersection of values.

For example:

Lead Picklist = A,C and

Round Robin = A,B,C or Round Robin = A or Round Robin = C.

All 3 are a match because at least one value from the lead matches one Assignment value.

NOT SUPPORTED - Exact Match or Subset

Not supported in this release but considering for future to allow different matching options for multi-select picklists that can be selected by the user.

Exact Match Only Definition

For Exact Matching, Lead Picklist = A,C and Round Robin = A,C,B would NOT Match.

But Not Supported - These values would Match in this release because both A and C are the intersection of A,C,B

Subset Only Definition

For Subset Matching Lead Picklist = A, C would NOT match with Round Robin = A or Round = C. It would match only with Round Robin = A,C, B or Round Robin = A,C.

But Not Supported in this release, Round Robin A,C would match with Round Robin = A, Round Robin = C, as well as Round Robin = A, C, etc.

Lead Zip/Postal Code Field Match

Matching is supported out of the box from the standard Lead field 'Zip/Postal Code' to the Round Robin Assignment multi select picklist Zip/Postal Code. No Zip/Postal Code values are included. Enter in your own values. Multi- select picklist are limited to 150 values each up to 40 characters, and 100 can be selected at a time on a record.

Lead Blank Value Matching

Use `##blank##` as a special picklist value in Round Robin Assignments for matching on blank value of a Lead picklist field.

Note: To use this option, do NOT create the Round Robin Assignment multi select picklist using a Global value set. You will not be able to add the picklist value `##blank##` without adding it to other picklists that share the Global Value Set

Round Robin Assign Lightning Action

The Round Robin Assignment button for single reassignment of a lead is now available as a Lightning Component. Be sure you have implemented My Domain before deploying the Round Robin Assignment Lightning Component to your Lightning Page Layout.