

# Round Robin Lead Assignment 2.0 Quick Start

Document Version 2.0

1. **Installation:** Install the Round Robin Lead Assignment Application. When prompted to select the profiles that should have access, it is recommended to install the package for System Administrators only.
  - a. RRLA 2.0 can be installed over an existing installation of RRLA 1.0 with no required changes for the 1.0 functionality to continue to work.
  - b. Round Robin Lead Assignment will be listed in Installed Packages.
  
2. **Round Robin Application:** Select Round Robin from the application drop down in the right hand corner of the screen and navigate to the About Round Robin Tab. The About Round Robin Tab provides links to additional documentation and ways to receive help.
  
3. **Round Robin Assignment Matching Filters:** Determine which Lead fields will be used for creating Round Robin Assignment Groups. Country, US States, Canadian Provinces, and Zip Code are supported out of the box and do not count towards matching limits. If your Round Robin Assignments will only use these fields ->**SKIP TO STEP 8**
  
4. **Lead Matching Fields:** RRLA can use ANY (standard/custom) PICKLIST field (Single/Multi) for matching. If the fields do not exist, create the picklist fields on the lead. Next, in Step 5, create the fields to match on the Round Robin Assignment Object. [To match using numeric or text fields see the Reference Guide Use Case section, or [Contact Janati](#) to discuss - there is a work around in 2.0]
  
5. **Round Robin Assignment Fields:** Create custom Round Robin Assignment MULTI-SELECT PICKLIST fields to match with lead picklists fields. In this example, we will use Lead Source (standard Lead field) and Region (custom Lead Field).
  - a. Navigate to Setup | Type Objects in the Quick Find search box | scroll down and click on Objects.
  - b. From the list of Objects, click on Round Robin Assignment.
  - c. From the Custom Fields & Relationships list click the New button.
  - d. Select picklist (multi-select) as the data type and click Next.
  - e. Round Robin Assignment matching fields should always be MULTI-SELECT PICKLISTS. Do **NOT** use Global Picklists for any Lead field where you want to match on "is blank".
  - f. Enter the name of the field and picklist values, then click Next.
    - i. Picklist values must be an exact text match with Lead field picklist values
    - ii. Country, US States and Canadian Provinces are pre-populated.

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label  i

Values

Use global picklist definition

Enter values for the picklist, with each value separated by a new line.

Public Relations  
 Seminar - Internal  
 Seminar - Partner  
 Trade Show  
 Web  
 Word of mouth  
 Other

Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.

Use first value as default value

Strictly enforce picklist values i

Multi-select picklists are displayed in a scrolling box on edit pages.

# Visible Lines

Field Name  i

Description

Help Text  i

Previous Next Cancel

- g. Assign corresponding profile permissions to the field, and click Next.
- h. Add the field to the Round Robin Assignment page layout, and click Save.
- i. Repeat steps c-h to create another matching field.

6. **Set Up Matching:** Configure Lead to Round Robin Assignment matching fields.

- a. Navigate to the Round Robin Setup Tab.

Round Robin Setup Leads Round Robin Assignments Round Robin Errors Reports +

Save Cancel

**Round Robin Limits**

Max Count Custom Matching Fields	2	Max Group Members per Assignment	10
Max Round Robin Assignments (Active)	2		

**Lead Assignment Rule Setting**

Check this field for the Round Robin process to always call the active lead assignment rule after Round Robin Assignment process is called

Always Call Active Assignment Rule

**Lead Matching**

Select the Lead Field and the Round Robin field to match from the dropdown list. Only single select picklist fields from the Lead and multi-select picklist fields from the Round Robin Assignment are supported.

Lead Field	<input type="text" value="Lead Source"/>	Round Robin Field	<input type="text" value="Lead Source"/>
Lead Field	<input type="text" value="Region"/>	Round Robin Field	<input type="text" value="Region"/>

Save Cancel

- b. The top section will display the Round Robin Limits based on your installed package. To request an increase to limits [Contact Janati](#).
- c. Select the Lead Picklist field to use for Matching in Round Robin Assignments by clicking on the Lead Field drop down.

- d. Then select the Round Robin Assignment Field from the drop down that should match with the Lead picklist field.
  - e. Repeat these steps in the Lead matching section for any additional fields that you want to use for matching.
7. **Assign New Leads**: Configure Round Robin to run on Lead Create
- a. Navigate to Setup | Customize | Leads | Fields
  - b. Select the **Round Robin** Field
    - i. This Yes/No picklist field is used on lead CREATE only to determine if the lead should be assigned via the Round Robin Lead Assignment engine. Set the default to 'Yes' if all leads should be assigned by the Round Robin lead assignment engine.
    - ii. IMPORTANT - If using record types, the default must be set for each record type by selecting the record type and then the Round Robin field. Defaults set on the field level do **NOT** apply to the record types.
  - c. **[OPTIONAL] Web to Lead Only**: 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.
    - i. 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.
    - ii. The syntax for setting the hidden field is  
`<input type=hidden name="xxxxxxxxxxxxxxxx" id="xxxxxxxxxxxxxxxx" value=Yes>`  
 Where xxxxxxxxxxxxxxxx is the Salesforce id for the field.
8. **Assign Existing Leads [New in 2.0]**: Configure Round Robin to Run after an Event - Example Lead Status = Qualified.
- a. Navigate to Setup | Create | Workflow & Approvals | Workflow Rules
  - b. Select New, Object = Lead
    - i. Select Created, and any time it's edited to subsequently meet criteria
    - ii. Rule Criteria - Lead Status = Qualified
  - c. Save and Add Workflow Action
    - i. New Field Update
    - ii. Field To Update = Round Robin Reassign = True

**Tip:** Contact Janati to discuss how to best mix and match Assigning New Leads and using reassignment criteria for Existing Leads. Also see the Use Case section in the Reference Guide.

9. **Round Robin Fields**: Add the Round Robin fields to the Lead page layout.
- a. Navigate to Setup | Customize | Leads | Page Layouts.
  - b. Edit the layouts that should have the Round Robin fields.
  - c. Drag and drop the Round Robin fields to the lead page layout. The Round Robin fields are listed below:
    - i. **Round Robin** - Call Round Robin on Lead Create. Picklist field with values yes/no. This fields is generally read only or not on the page

layout. [Contact Janati](#) to create an override button that always sets Round Robin to “NO” for leads created directly in the UI.

- ii. **Round Robin Reassign** - Checkbox field used to call Round Robin on update, after processing by workflow or process builder. Generally not available in the UI as the button or Action can be made available. Round Robin Reassign does not operate when leads are created, only update.
- iii. **Round Robin Assignee** - This user lookup field will be updated with the user that is assigned via the Round Robin Lead Assignment engine or blank if no match. This field should be READ ONLY for all users in the UI for troubleshooting.
- iv. **Round Robin Result** - This text area field will be updated with the Assignment Name of the matching Round Robin Assignment (or NO Round Robin Match) on the last Round Robin call. This field should be READ ONLY for all users for troubleshooting.
- v. **Round Robin Last Date** - Set to the last time Round Robin was run whether there was a match found or not. This field should be READ ONLY for all users for troubleshooting

**Tip:** If the fields do not appear on the layout, check the field level security settings to ensure the appropriate user profiles have access to view/edit the fields.

#### 10. **Round Robin:** Configure Round Robin Assignments

- a. Navigate to the Round Robin Assignments Tab.
- b. Click the New button to create a New Round Robin Assignment.
- c. Populate the Round Robin Assignment fields and click Save.
  - i. Assignment Name - Make sure to name the assignment with a logical name as it will be used to update matching leads for troubleshooting.
  - ii. Order - The order that the assignments will be executed. Order is important because once a match is found, the lead is assigned.
  - iii. Active - Make sure the assignment is set to active prior to Round Robin Lead Assignment. Only active assignments count toward the limits.
  - iv. Last Member Order Number - The field should be left *blank* and READ ONLY as it will be updated by the Round Robin Assignment engine with the Group Member Order Number that was last assigned a lead.
  - v. Select values for Lead matching for Country, US States, Canadian Provinces and custom matching fields.
  - vi. To match by Zip/Postal Code, first populate the field provided
    - 1. Navigate to Setup | Type Objects in the Quick Find search box | scroll down and click on Objects; click on Round Robin Assignment.
    - 2. Select the Zip/Postal Code field and New in the Values section
      - a. Enter the values you want to use for any Zip Code Matching

- b. You can enter up to 150 values
- vii. For multi select lead picklist fields, intersection of the values are used
  - 1. A match is positive if any of the values on the Lead match any of the values for the Round Robin Assignment field,
- viii. To match on a Lead field = blank, you must add a special code to the matching field
  - 1. Navigate to Setup | Type Objects in the Quick Find search box | scroll down and click on Objects, select Round Robin Assignment
  - 2. Select any field where blank matching is desired
    - a. Select New in the Values section
    - b. Add value `##blank##`; this will be used in the filter to match on blank.
  - 3. Repeat for additional fields that will use blank matching

Round Robin Assignment Edit Help for this Page ?

### 1. US Country and CA

**Round Robin Assignment Edit** Save Save & New Cancel

**Information** ! = Required Information

Assignment Name  Active

Order  Last Member Order Number

Industry

Lead Source     Region

Country   Available

US States

**Tip:** To match on all Leads create a Round Robin Assignment with NO filters set.

11. **Set up Members:** Add Round Robin Group Members.
  - a. From the Round Robin Assignment related list, click on the New Round Robin Group Member Button.
  - b. Populate the Round Robin Group Member fields, and click Save.
    - i. Assignment Active - Make sure the checkbox is checked in order to assign the user a lead.
    - ii. Member Order - The order that the group members will be assigned. If the Member Order is blank the group member will be added to the end of the

list and last number assigned. Duplicate entries will be renumbered automatically.

- iii. Last Assignment - This field should be *blank* and set to READ ONLY as it will be updated by the Round Robin Assignment engine when the Group Member is assigned a lead for the Round Robin Assignment.

Round Robin Group Member Edit  
RR-000

Help for this Page

Round Robin Group Member Edit Save Save & New Cancel

Information ⓘ = Required Information

Round Robin Assignment 1. US Country and CA Item RR-000

User Rep Jane Doe Last Assignment [ 7/6/2016 10:21 AM ]

Assignment Active

Member Order 1

Save Save & New Cancel

**Repeat** steps 10-11 to create multiple Round Robin Matching groups based on different filters. Use the same groups for New & Existing leads or set up different assignments based on Status.

12. **Notifications:** Activate both the Round Robin Assignment workflow rules for notifications.
  - a. Navigate to Setup | App Setup | Create | Workflow & Approvals | Workflow Rules
  - b. 'Round Robin Assignment' will send an email to the lead owner when there is a match to the Round Robin Assignment.
  - c. 'Round Robin Assignment Changed' will send an email alert to the new lead owner when there is a change in the assignment.
  
13. **[OPTIONAL]: Calling Standard Lead Assignment:** Configure the Round Robin Lead Assignment Rule Setting.
  - a. Determine if you always want to call Lead Assignment after Round Robin assignment by any of the Round Robin fields or buttons.
    - i. Note: If Using Web to Lead, Standard Assignment is always called.
  - b. Navigate to the Round Robin Setup Tab.
    - i. check the 'Always Call Active Assignment Rule' checkbox on the Setup page.
  - c. If you are unsure of what flags are set by various integrations or are using Web to Lead for some leads and want ALL leads to behave the same - this is a good option.
  - d. Be sure to follow Step 14 below when the Lead Assignment Rule is being called.
  
14. **[OPTIONAL] Standard Lead Assignment Rule Configuration:** IMPORTANT: Make sure the standard Lead Assignment rule is configured if you are using Web to Lead (Web to Lead **always** calls Assignment Rules), an integration is calling Lead Assignment, or you have set the option to Always Call the Assignment Rule set in step 12 above.

- a. Navigate to Setup | App Setup: Customize | Leads | Lead Assignment Rules.
- b. Click on Active Lead Assignment rule. If there is no Lead Assignment rule in place create a new Lead Assignment rule and make it active.
- c. Click New under Rule Entries.
- d. The rule should be the first entry to be evaluated to ensure the lead is not reassigned after Round Robin Lead Assignment is processed.
- e. The criteria is Lead: Round Robin Assignee not equal to *blank*.
- f. Check the **Do Not Reassign Owner** checkbox and click Save.
- g. Without this entry, standard assignment if called, will override Round Robin Assignment

**Active Lead Assignment**

Enter the rule entry Save Save & New Cancel

**Step 1: Set the order in which this rule entry will be processed** ! = Required Information

Sort Order i  !

**Step 2: Select the criteria for this rule entry**

Run this rule if the following  !:

Field	Operator	Value	
Lead: Round Robin Assignee	not equal to	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND

[Add Filter Logic...](#)

**Step 3: Select the user or queue to assign the Lead to**

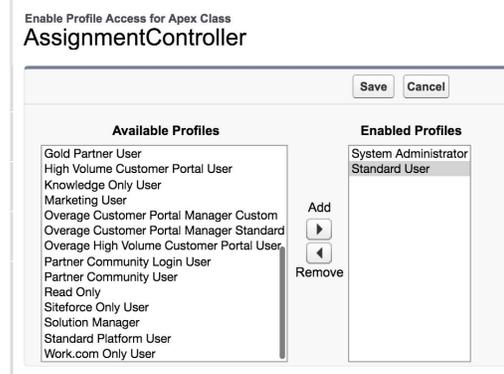
User  ! Email Template

Do Not Reassign Owner

Save Save & New Cancel

15. [OPTIONAL]: **Assignment Button - Classic Salesforce:** Configure the Round Robin Assignment Button for manual Lead Assignment of existing Leads

- a. Navigate to Setup | Customize | Leads | Page Layouts
  - i. Edit the layouts that should have the Round Robin Assignment button.
  - ii. Select the Buttons category at the top and drag the Round Robin Assignment Button to the Custom Buttons area of the page to manually assign or reassign leads using the Round Robin Assignment engine.
  - iii. Click Save to save the changes to the page layout.
- b. User profiles must be granted access to the 'AssignmentController' Apex Class to use the manual Round Robin Assignment Button.
  - i. Navigate to Setup | App Setup: Develop | Apex Classes and click on the Security hyperlink next to the Assignment Controller class. Then move the appropriate profiles from the available profiles to the Enabled Profiles and click Save.



- c. Note: The Round Robin Assignment Button will call Round Robin Assignment each time it is selected and operates regardless of the Round Robin yes/no setting on the Lead record.
- d. See the Round Robin Lead Assignment Setup and User Guide for details on the **Mass Reassign** leads button.

16. **[OPTIONAL]: Lightning Action - Lightning Salesforce:** Configure the Round Robin Assignment Action for manual Lead Assignment of existing Leads.

- a. Navigate to Setup | Customize | Leads | Page Layouts
  - i. Edit the layouts that should have the Round Robin Assignment Action.
  - ii. Select the Mobile & Lightning Actions category at the top and drag the Round Robin Assignment Action to the Salesforce Mobile and Lightning Experience Actions area of the page to manually assign existing leads using the Round Robin Assignment engine.
  - iii. Click Save to save the changes to the page layout.
  - iv. To use Lightning Components, My Domain must be implemented. See Salesforce Help for more details on how to set up My Domain.

## Additional Resources

The RRLA Setup and User Guide will provide more detailed information about Round Robin Lead Assignment. For additional information and access to the [RRLA Setup and User Guide](#) visit the [Janati Consulting website](#).

To Contact Janati email us at [support@janaticonsulting.com](mailto:support@janaticonsulting.com).