

# Round Robin Lead Assignment Quick Start

Document Version 1.2

1. Install the Round Robin Lead Assignment Application. When prompted to select the profiles that should have access to the Round Robin engine and objects, it is recommended to install the package for System Administrators only.
2. The Round Robin Lead Assignment will be listed in Installed Packages.
3. 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.
4. Determine which Lead picklist fields will be used for customizing Round Robin Assignment. If the fields do not exist, create the appropriate picklist fields on the lead. Only SINGLE-SELECT PICKLIST fields are supported. Country, US States, and Canadian Provinces are supported out of the box.
5. Create custom Round Robin Assignment MULTI-SELECT PICKLIST fields to match with lead picklists fields. In this example, we will use Region (custom Lead field) and Lead Source (standard 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.

Custom Fields & Relationships				
Action	Field Label	API Name	Installed Package	Data Type
Edit	 Active	Janati_RR_Active__c	RoundRobin	Checkbox
Edit   Replace	 Canadian Provinces	Janati_RR_Canadian_Provinces__c	RoundRobin	Picklist (Multi-Select)
Edit   Replace	 Country	Janati_RR_Country__c	RoundRobin	Picklist (Multi-Select)
Edit	 Last Member Order Number	Janati_RR_Last_Member_Order_Number__c	RoundRobin	Number(18, 0)
Edit	 Notes	Janati_RR_Notes__c	RoundRobin	Long Text Area(32768)
Edit   Replace	 Object	Janati_RR_Object__c	RoundRobin	Picklist
Edit	 Order	Janati_RR_Order__c	RoundRobin	Number(18, 0)
Edit   Replace	 US States	Janati_RR_US_States__c	RoundRobin	Picklist (Multi-Select)

- d. Select picklist (multi-select) as the data type and click Next.
- e. Enter the name of the field and multi-select picklist values (to be used for matching, picklist values must be an exact text match with Lead field picklist values), then click Next.

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

- f. Assign corresponding profile permissions to the field, and click Next.
  - g. Add the field to the Round Robin Assignment page layout, and click Save.
  - h. Repeat steps c-g to create another matching field.
6. Configure the Round Robin Lead Assignment Rule Setting and the 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**

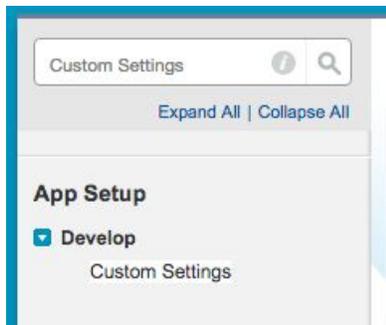
Select the Lead Field and the Round Robin field to match from the dropdown list. Only single select picklist fields from the Lead and multi-select picklist fields from the Round Robin Assignment are supported.

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 increase the limits navigate to the About Robin Robin Tab and click on the Contact Janati hyperlink.

- c. When Round Robin is set to 'Yes' on the lead or when the lead is assigned manually by using the Round Robin Assignment button, determine if you want to always fire standard lead assignment rules along with the Round Robin assignment. If so, check the 'Always Call Active Assignment Rule' checkbox on the Setup page.
  - d. Select the Lead Picklist field to use for Round Robin Assignment by clicking on the Lead Field drop down.
  - e. Then select the Round Robin Field from the drop down that should match with the Lead picklist field.
  - f. Repeat these steps in the Lead matching section for any additional fields that you want to use for matching.
7. [OPTIONAL] If State and Country picklists are not enabled, configure the US Synonyms Custom Setting to define synonym matching for US. (To determine if state and country picklists are enabled, navigate to Setup | Administration Setup: Data Management | State and Country/Territory Picklists)
- a. Navigate to Setup | Type Custom Settings in the Quick Find search box | scroll down and click on Custom Settings.



- b. Click on the Manage hyperlink next to the Round Robin US Synonyms.
- c. Click the New button to create a US country synonym. In the example below we use USA.

## Round Robin US Synonyms Edit

Provide values for the fields you created. This data is cached with the application.

Edit Round Robin US Synonyms		Save	Save & New	Cancel
<b>Round Robin US Synonyms Information</b>				
Name	USA			

- d. Click Save & New, to add additional synonyms.

8. **IMPORTANT:** Make sure the standard lead assignment rule is configured if you are using Web to Lead (Web to Lead **always** calls Assignment Rules) or if the 'Always Call Active Assignment Rule' checkbox is selected from step 6.
  - 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.

**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

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

Run this rule if the following  criteria are met:

Field	Operator	Value	
Lead: Round Robin Assignee	not equal to		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

[Add Filter Logic...](#)

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

User  Email Template

Do Not Reassign Owner

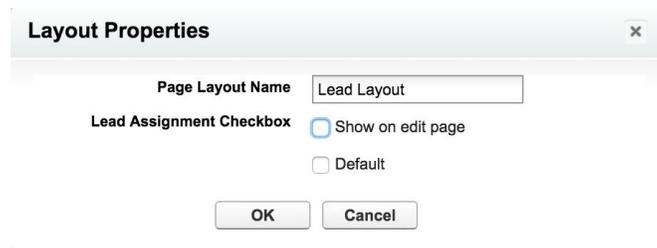
Save Save & New Cancel

9. 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. 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

10. 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 - Allow users to edit this field when creating a lead if the users should have the ability to determine if a lead should be assigned by RRLA.
  - ii. Round Robin Assignee - This user lookup field will be updated with the user that is assigned via the Round Robin Lead Assignment engine. This field should be READ ONLY for all users.
  - iii. Round Robin Result - This text area field will be updated with the Assignment Name of the matching Round Robin Assignment. This field should be READ ONLY for all users.
  - iv. 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.
  - v. If the 'Always Call Active Assignment Rule' checkbox is selected from step 6, click on the Layout Properties button and make sure the Lead Assignment Checkbox, 'Show on edit page', is unchecked so the Standard Call Lead Assignment field does not appear on the Lead page layout. Leads with Round Robin = 'Yes' and 'Always Call Active Assignment Rule' selected, would always call the Active Assignment Rule regardless of the standard setting.

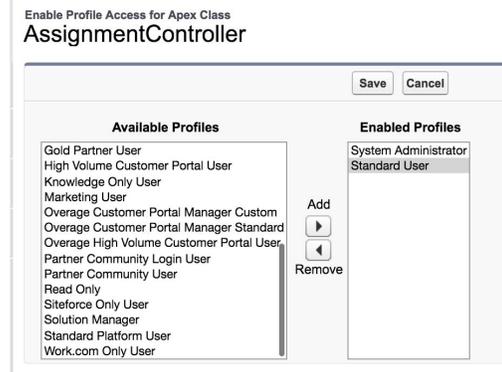


- d. Click Save after all of the changes have been made to the page layout.

11. [OPTIONAL]: Configure the Round Robin Assignment Button for manual Lead Assignment.

- 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.

12. 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. 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 the lead for troubleshooting and reporting.
  - ii. Order - The order that the assignments will be processed.
  - iii. Active - Make sure the assignment is set to active prior to Round Robin Lead Assignment. Only active assignments count toward the installation 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.

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

▶  ▶  
 ◀  ◀  
 ◀

Country **Available** Chosen

▶  ▶  
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US States Available

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Tip: To match on all Leads use Lead Status and select all Lead Status values.

#### 14. 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

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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	<input checked="" type="checkbox"/>		
Member Order	1		

Save   Save & New   Cancel

## 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).