AssignMe

Document Version: 1.0

Date: Mar'2023

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1 Introduction

AssignMe App will let the Manager in the Organization re-assign all the corresponding records assigned to the user who is about to leave the organization.

2 Benefits of AssignMe

AssignMe Application has capability to reassign records from 5 major standard objects (Account, Contacts, Case, Lead and Opportunity) when a user is deactivated. Also, after the application is installed, there is an option to select/configure the Objects, record types and status, of which we want to reassign the records to deactivated user's manager. Once the records are reassigned to the manager, an email notification will be sent to the manager informing her/him about the assignment of records. Then the manager has an option to reassign the records to other users in the organization or keep them in his name.

3 Prerequisites

Go to AppExchange AssignMe App

Click on the "Get it Now" button to install it.

4 Installation

- You can install AssignMe App in the Salesforce through the Salesforce Lightning mode.
- To install the app using the Salesforce Lightning mode, switch to Salesforce Lightning mode.
- To switch the mode, navigate to Admin -> Switch on Salesforce Lightning Experience.

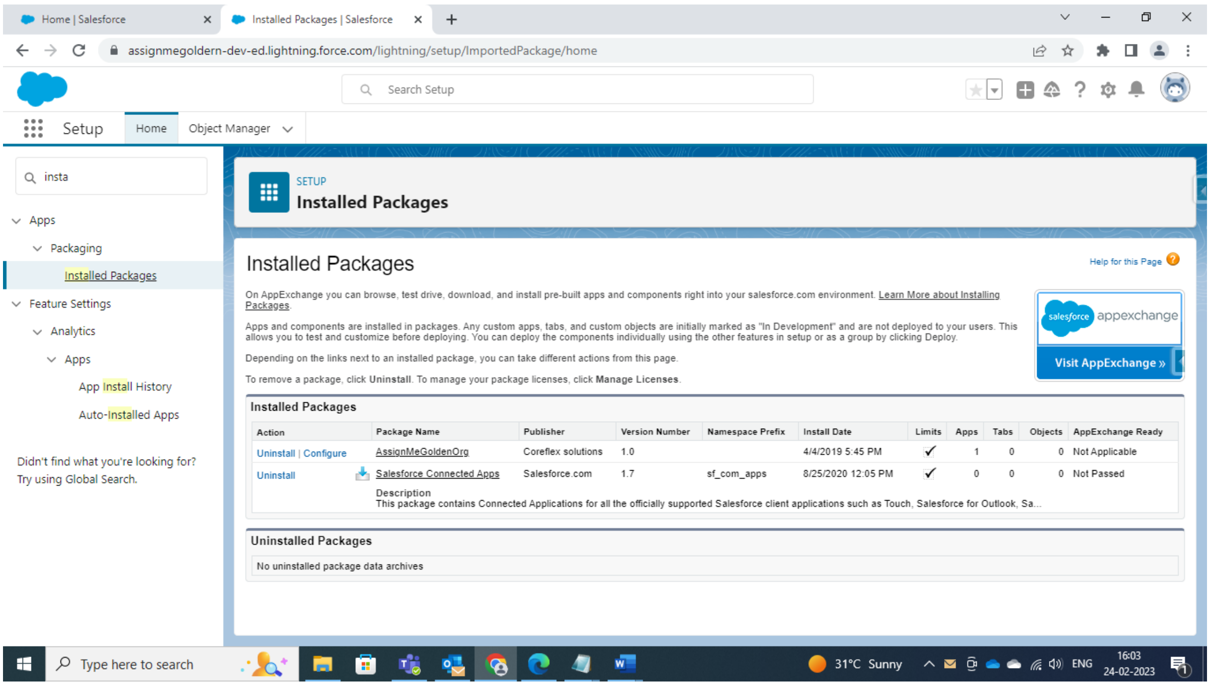
5 Configuration of Package

AssignMe App Configuration:

After “ASSIGNME” Application is installed, there is an option to configure, where we can select the Objects, Record Types, and status for which you want the records to be reassigned.

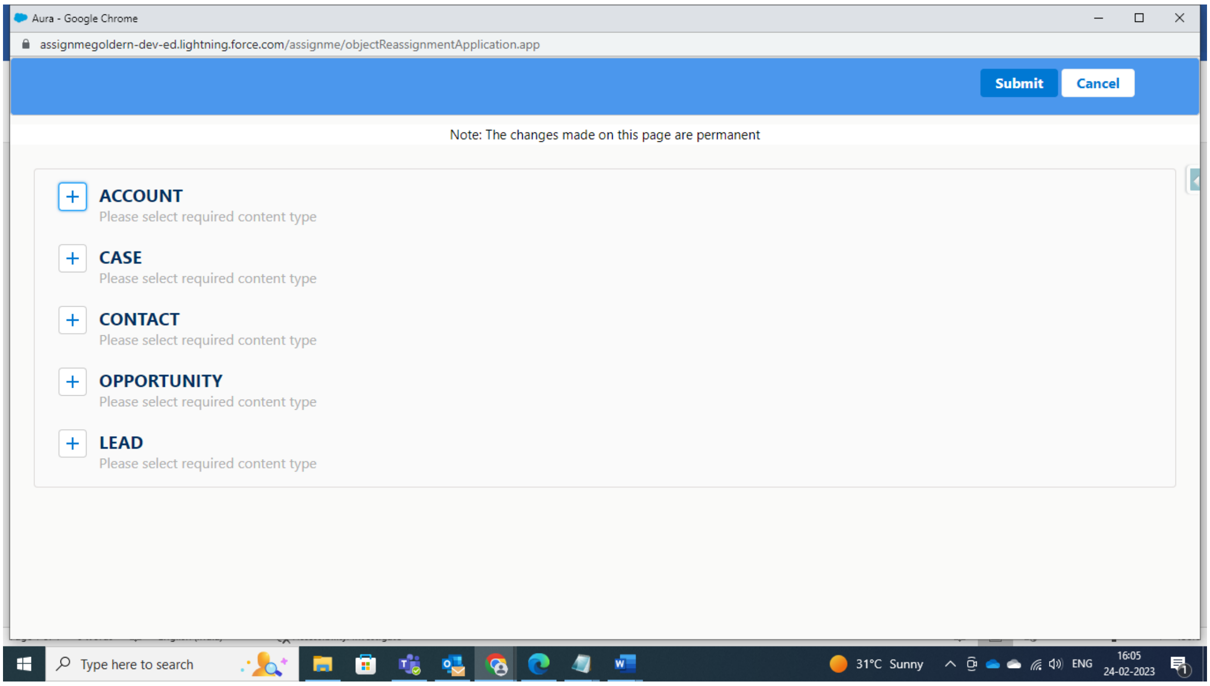
To configure the app using the Salesforce Lightning mode, switch to Salesforce Lightning mode.

In Salesforce Lightning, navigate to Setup ->Type Installed Packages in Quick find Box -> Click on “Installed Packages->Click on “Configure”



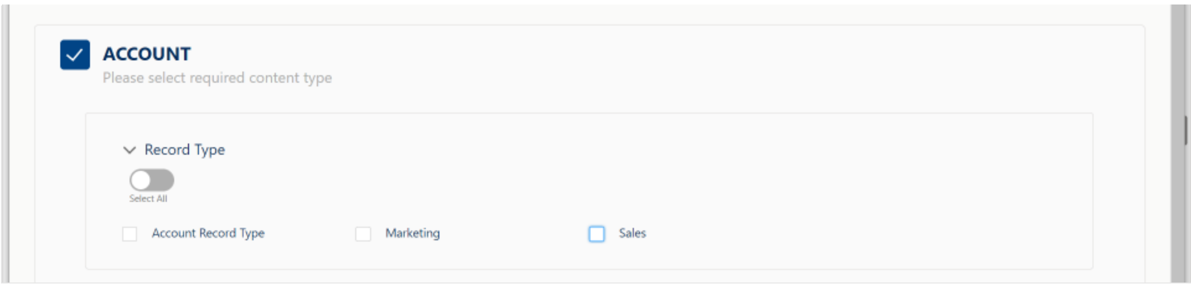
1) On clicking on "Configure" you will be redirected to next page where you need to select "Record Type" and "Status".
2) When the user leaves the Organization, Admin just needs to deactivate the user in the organization.
3) Deactivated user records are available in the Object Reassignment and assigned to the respective Manager.
4) When Manager assigns the record to other user, those records are removed from the ‘Object Reassignment’. If not, records will be with Manager itself.

Below is the configuration page to select the Objects.

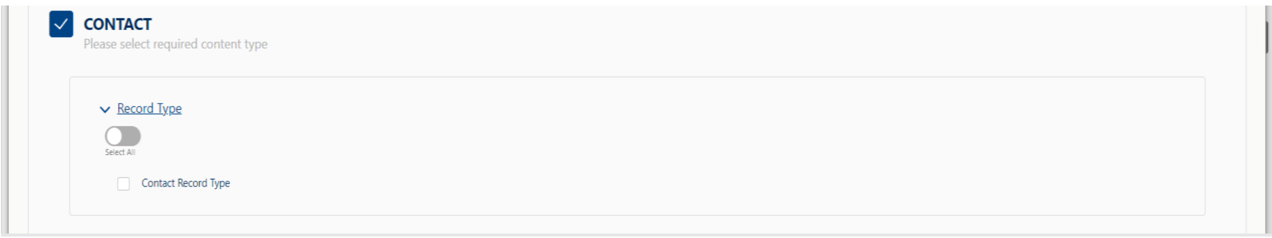


Based on the selected objects in the above step, there should be options displayed to select Record Types and status as shown below.

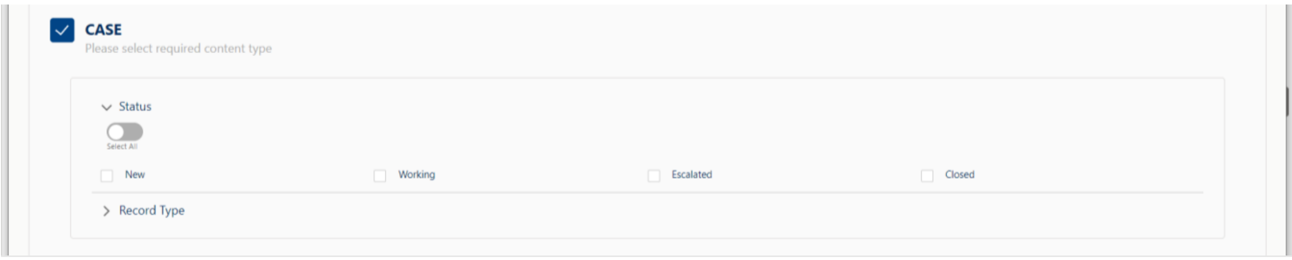
An Overview of Account Object and its Record Types



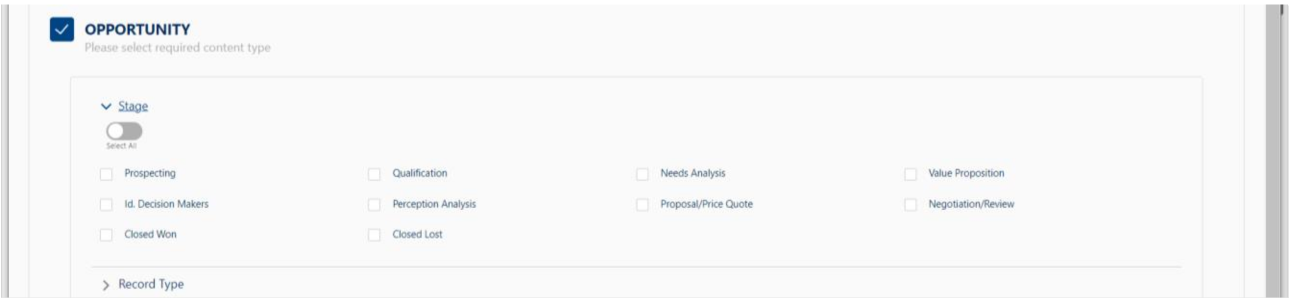
An Overview of Contact Object and its corresponding Record Types



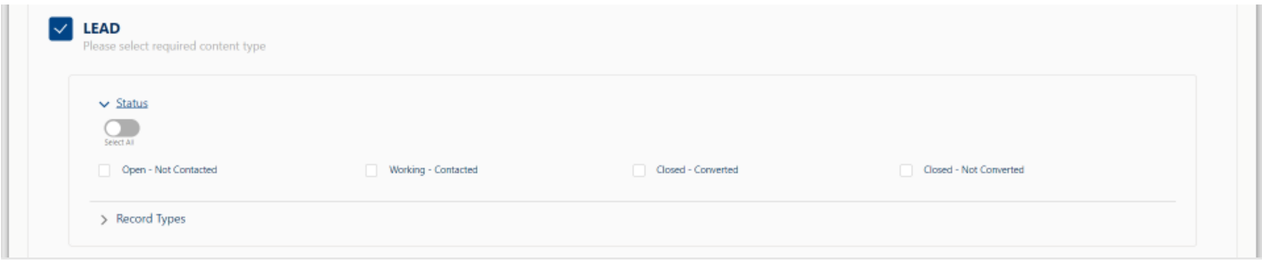
An Overview of Case Object with its corresponding Case Status



An Overview of Opportunity Object with its corresponding Opportunity Stages.



An Overview of Lead Object with its Corresponding Lead Status.



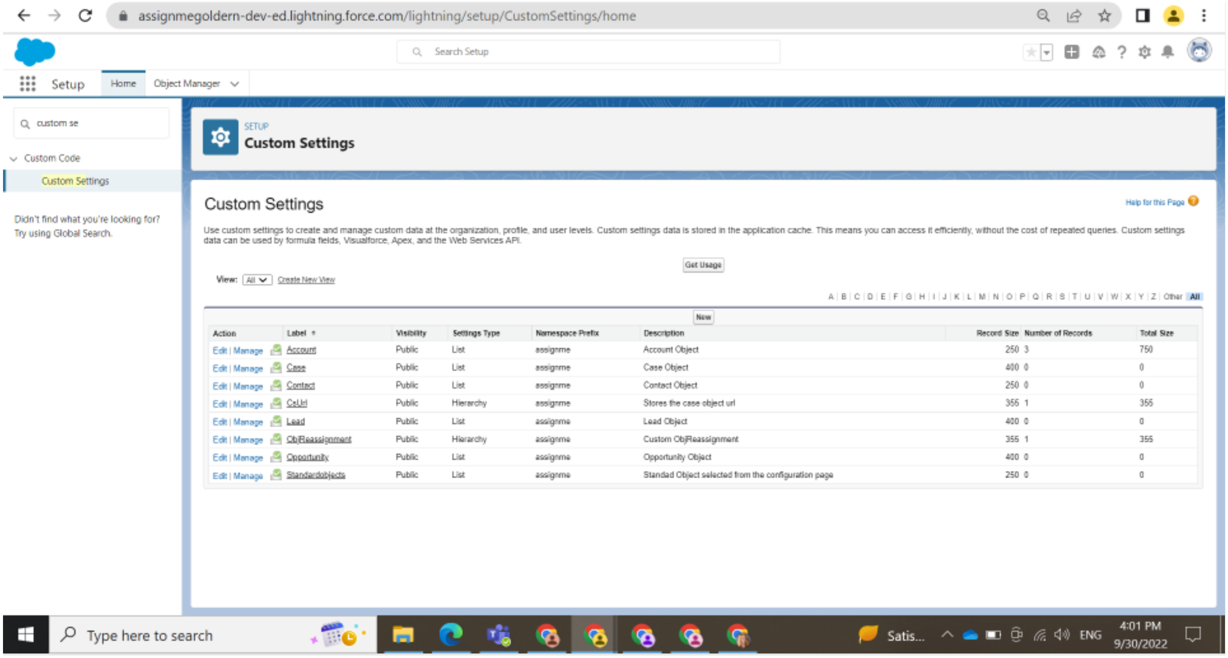
Example: An "Account" Object with Sales Record Type and "Case" Object status with "New" and "Working" is selected and click on Submit.

1. System Admin can select all the record types and statuses from the above page and click on submit.
2. Once the submit button is clicked then the selected data will be stored into custom settings which will be later used for reassignment of deactivated user records.

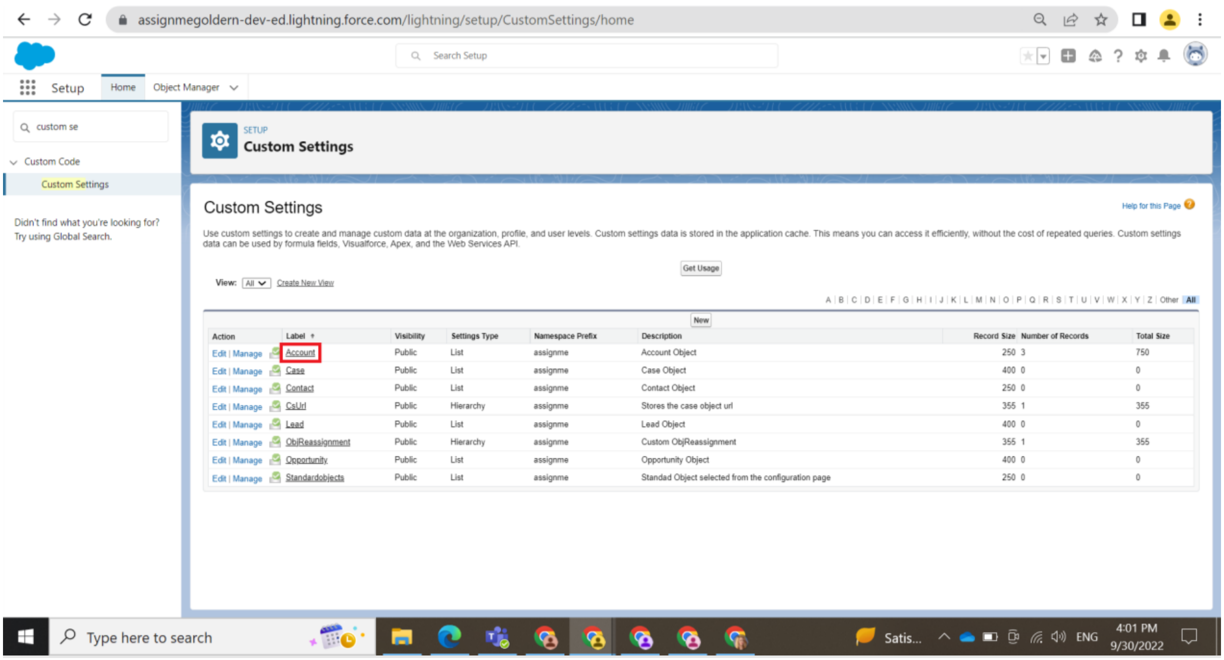
The selected Account Object Record Type and the Case Object Statuses values will be stored in the Custom Settings.

Custom Settings Navigation:

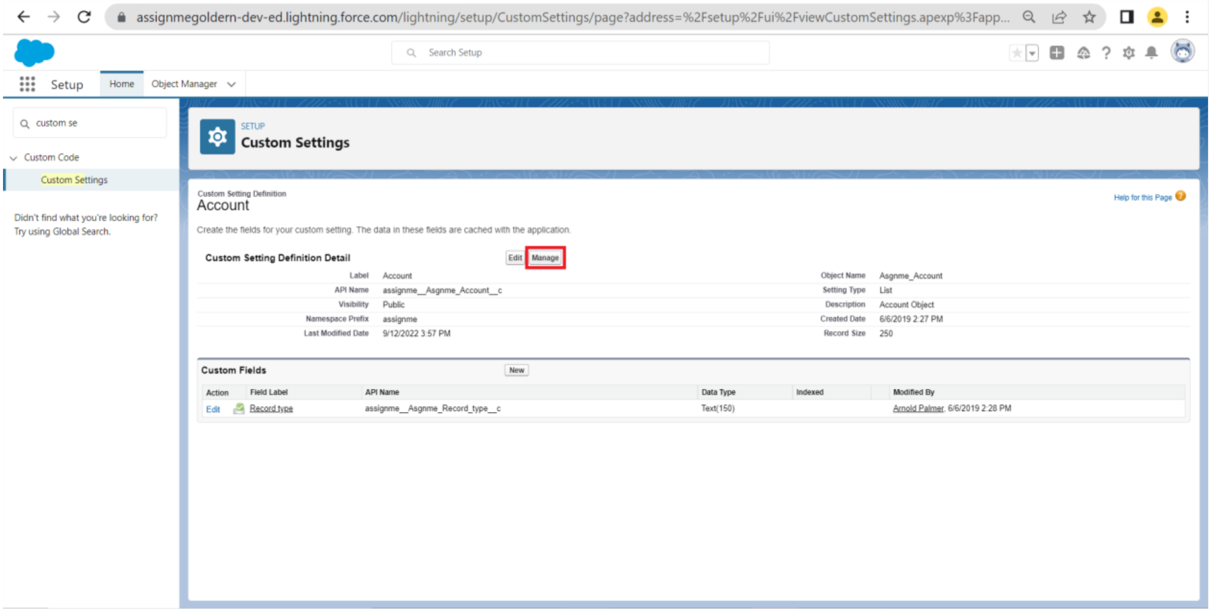
Setup ->Type Custom Settings in Quick find Box -> Click on Custom Settings



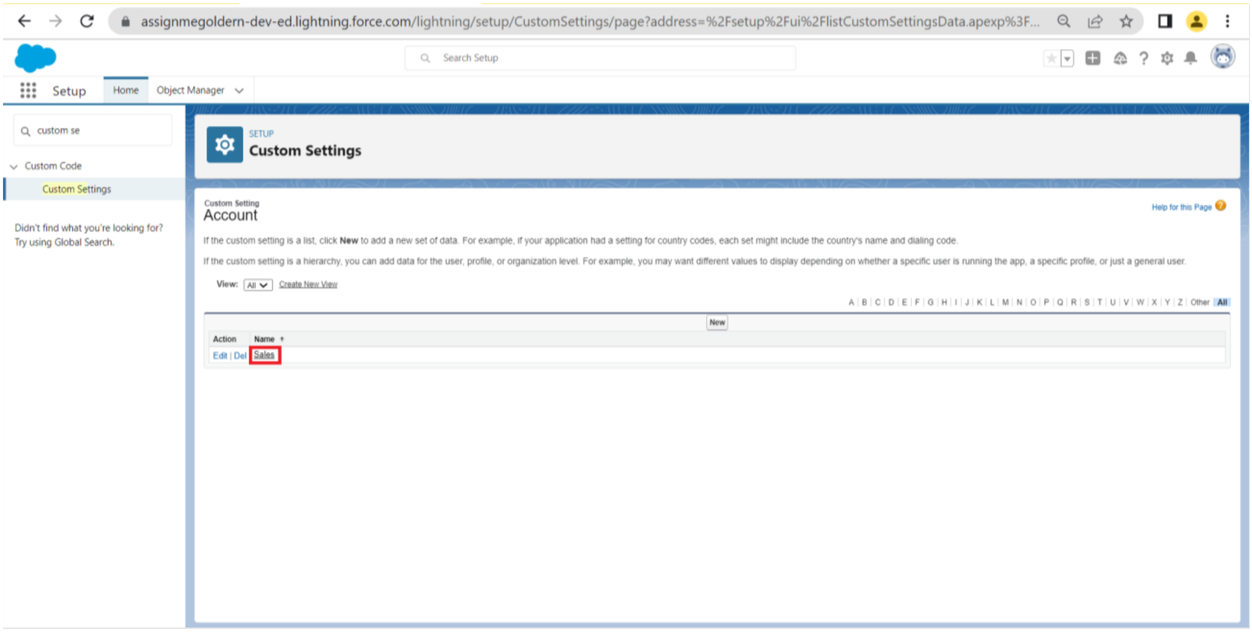
Click on Account Object



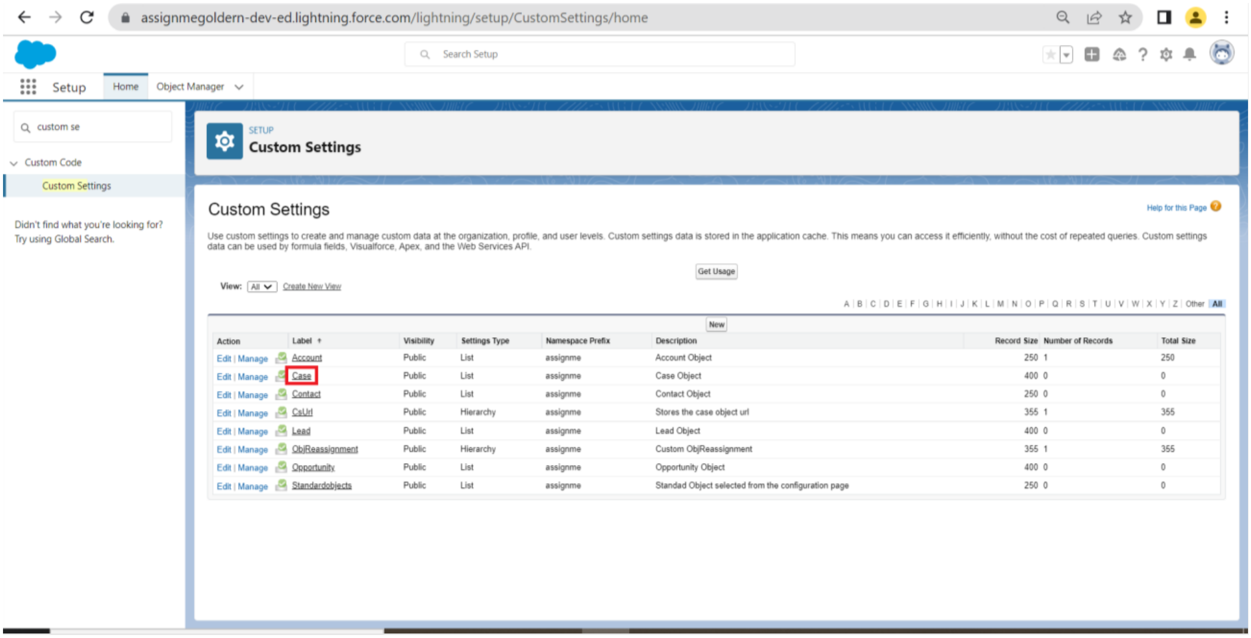
Click on Manage



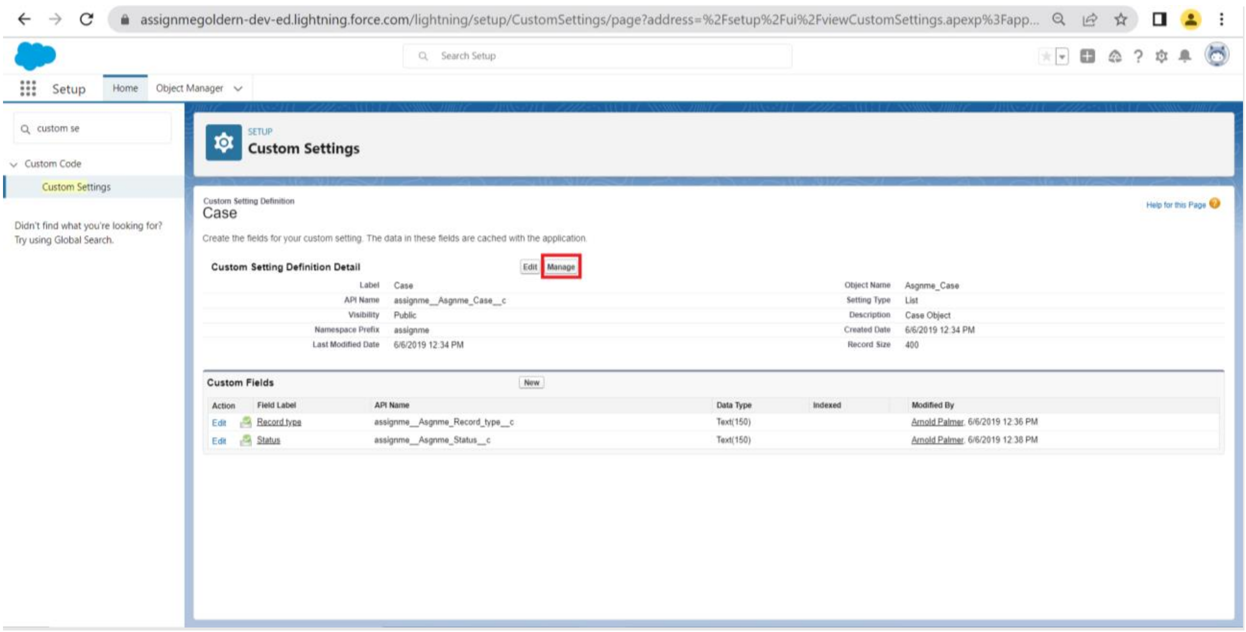
The Record Type for Account Object which is selected during configuration is stored here.



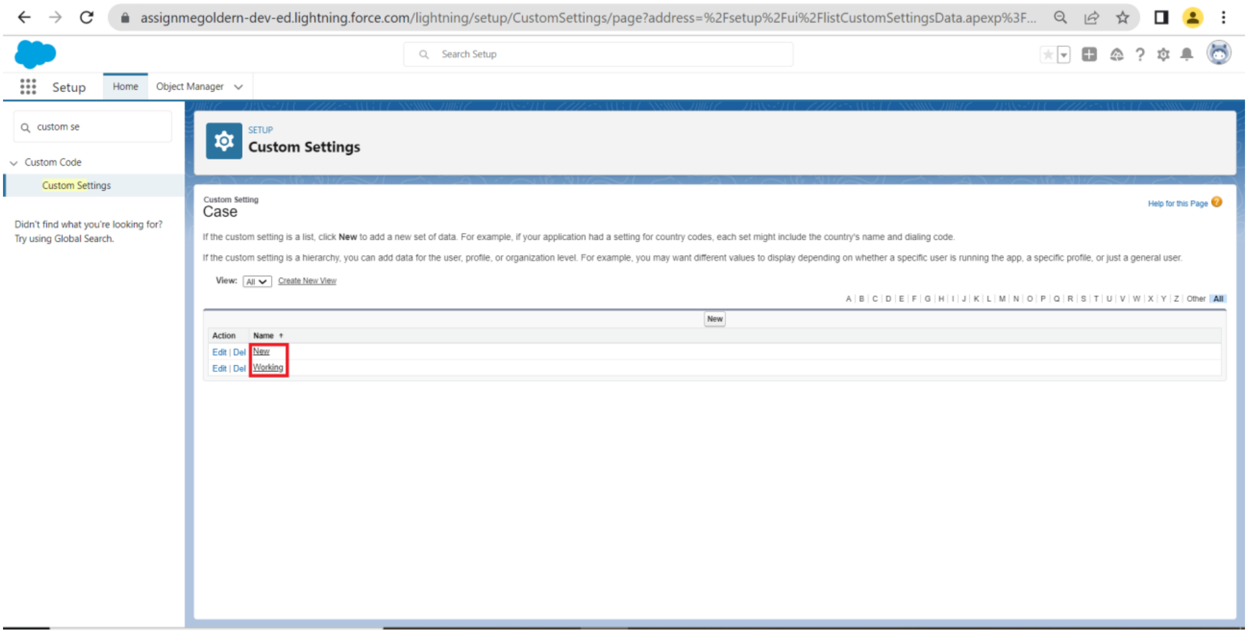
Select and click on Case



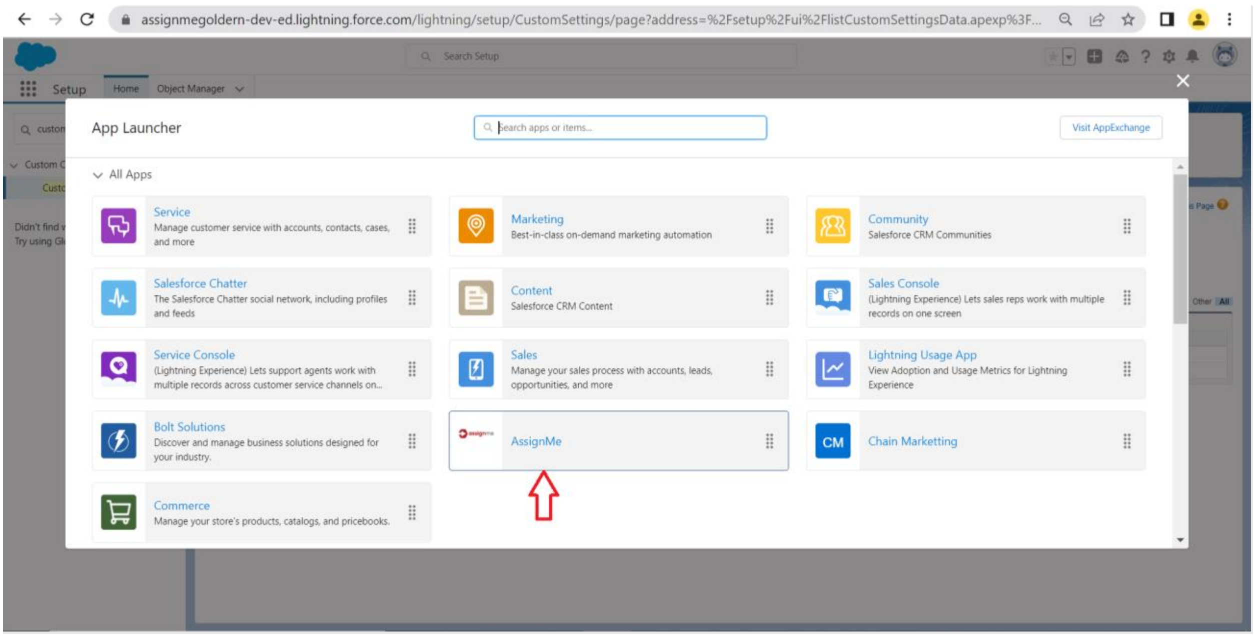
Click on Manage



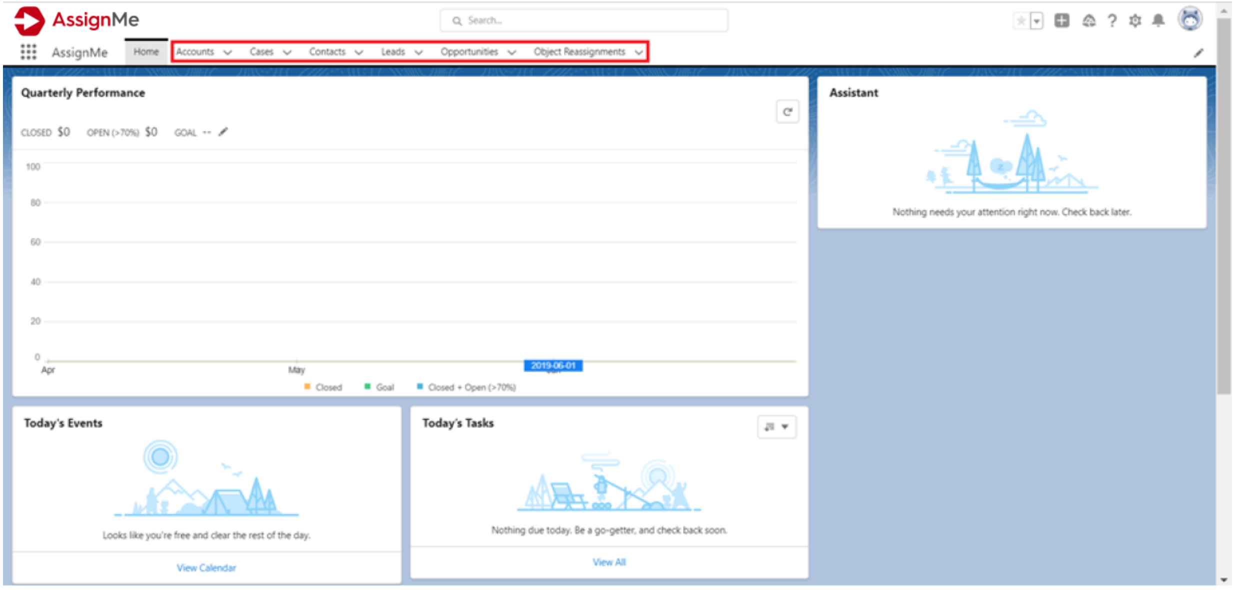
The "New" and "Working" Case Status which is selected during the configuration is stored here.



For accessing lightning app, click on "App Launcher" and select "AssignMe".

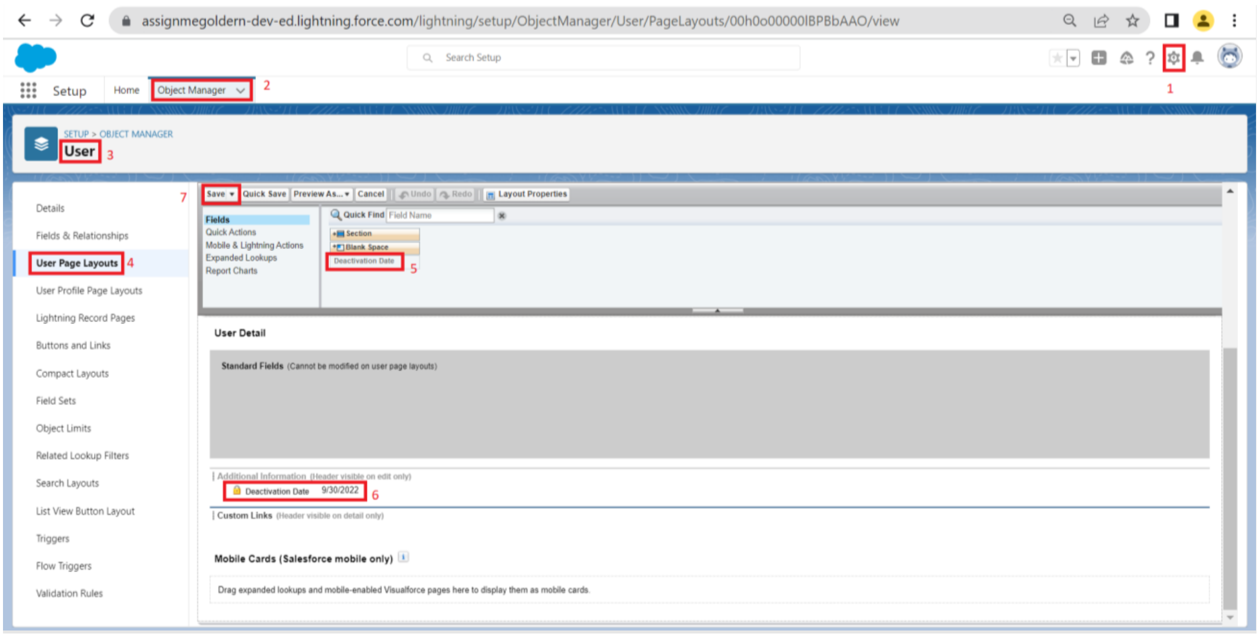


You will get Accounts, Cases, Contacts, Leads, Opportunities and Object Reassignments Tabs.



User Page Layout Set Up:

Steps to Set 'Deactivation Date' field in User object layout: Go to Set up -> Object manager -> User object -> User Page layouts -> Drag and drop Deactivation Date and click on Save button.

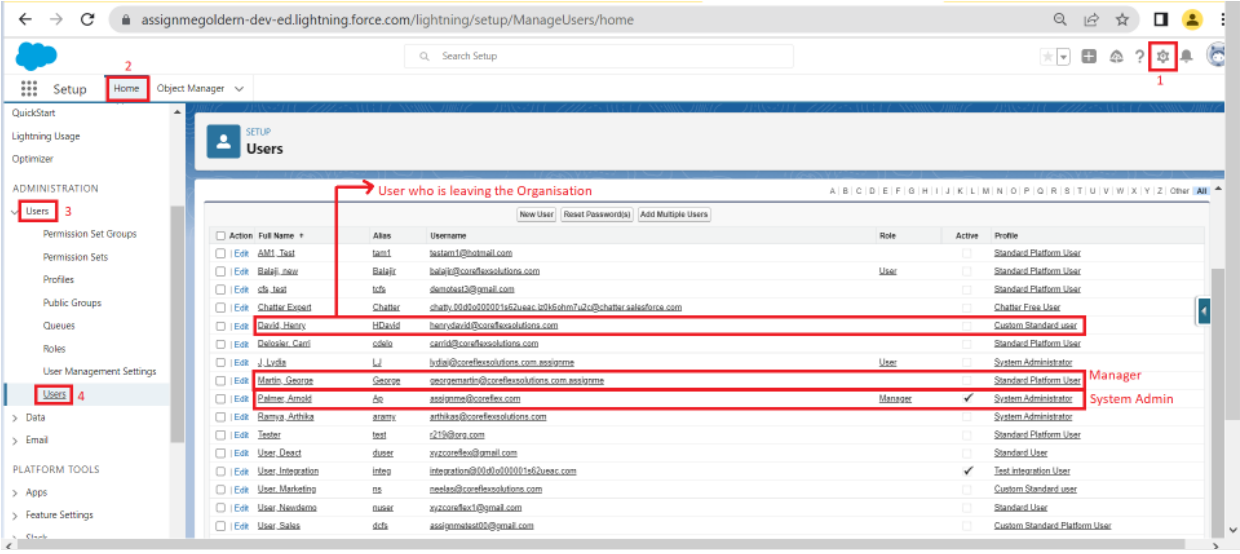


Note: An Overview of List of users

In the below Screenshot the user **Arnold Palmer** is the System Administrator and **George Martin** is the Manager to the User **Henry David** who is going to leave the organization.

Navigation:

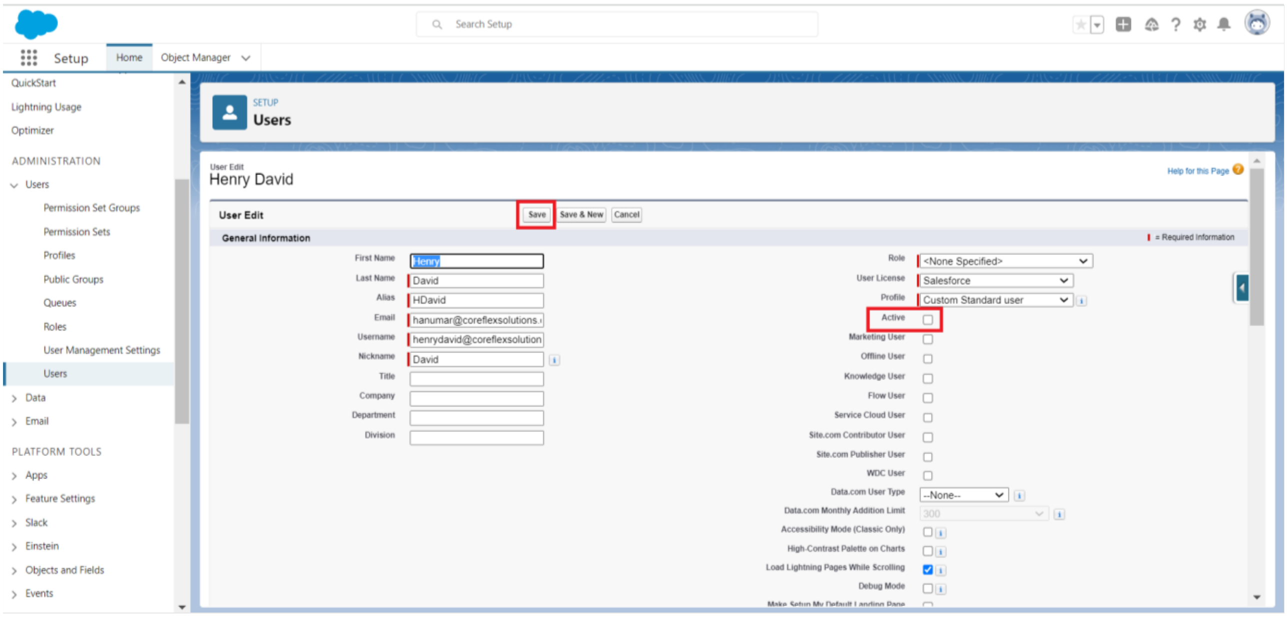
Go to Set up ->Home-> User in Quick find Box->Users



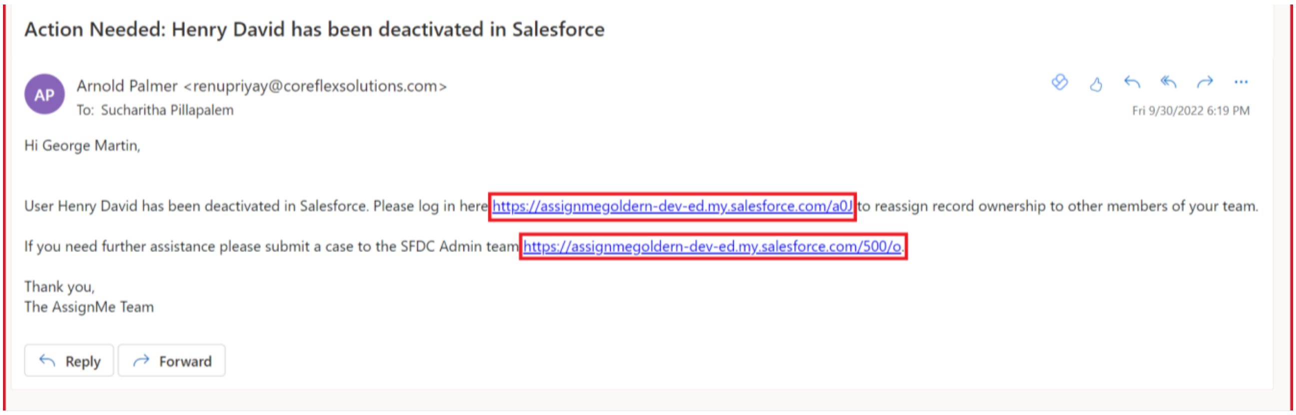
To Deactivate a User:

The System Admin will deactivate the user who is going to leave the organization.

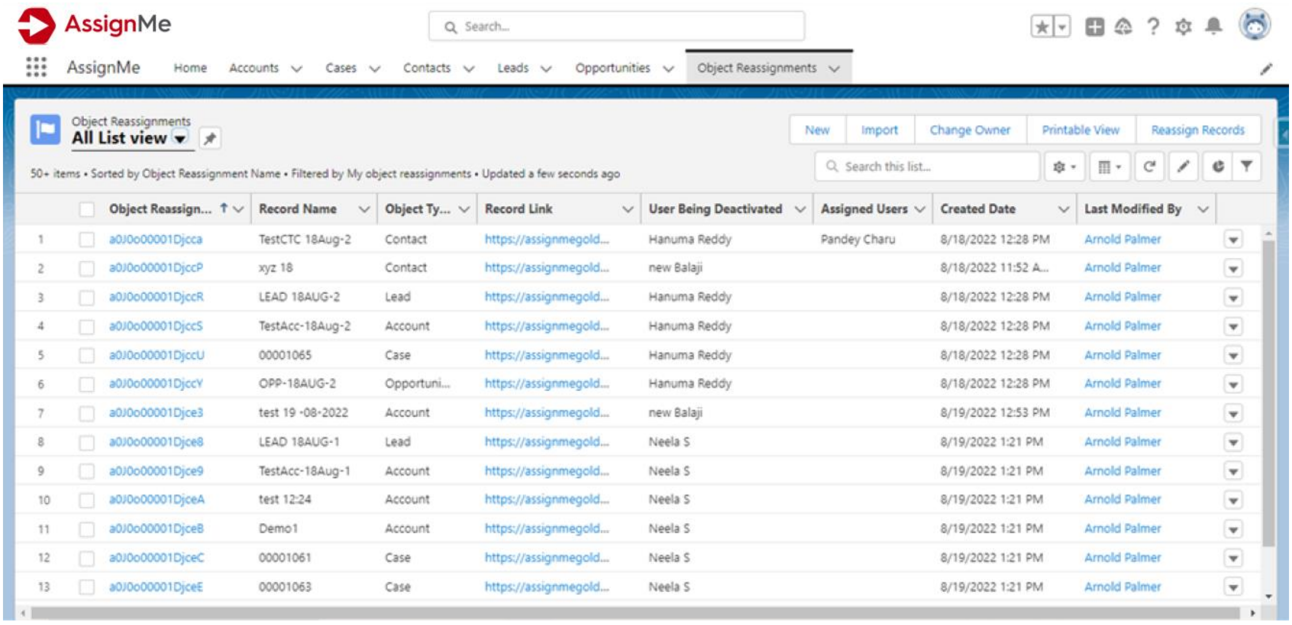
The System Admin should uncheck the “Active” check box and click on “Save” button.



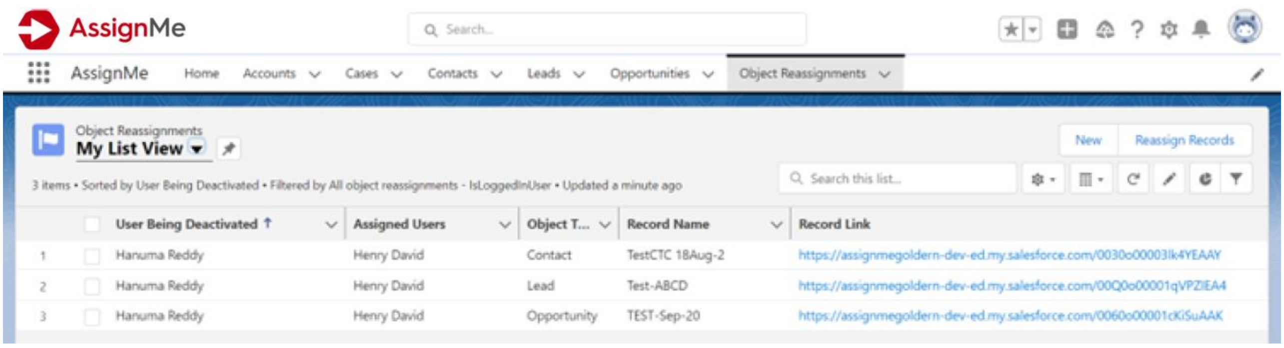
An Email notification is sent to the respective Manager informing her/him about the Re-assignment of records and to submit a Case for further help.



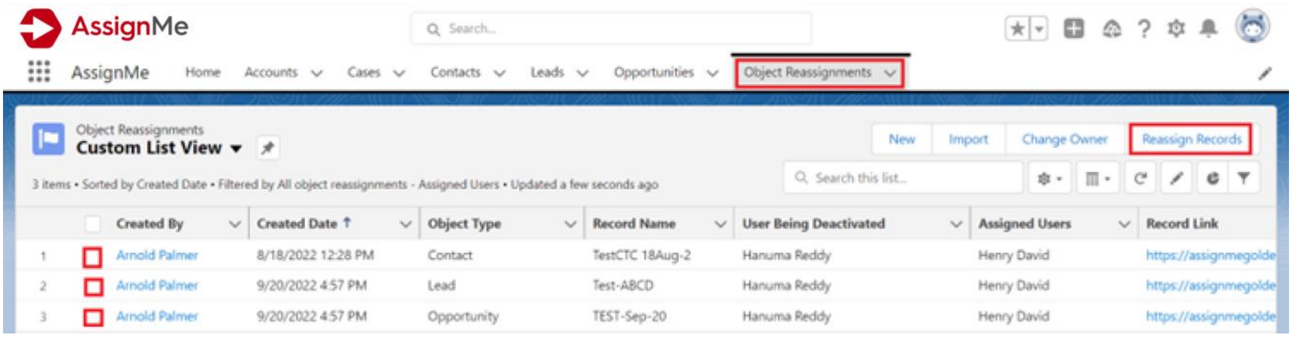
When the Manager logs in with the URL sent to the email, he/she will be automatically redirected to "Object Reassignment" Object.



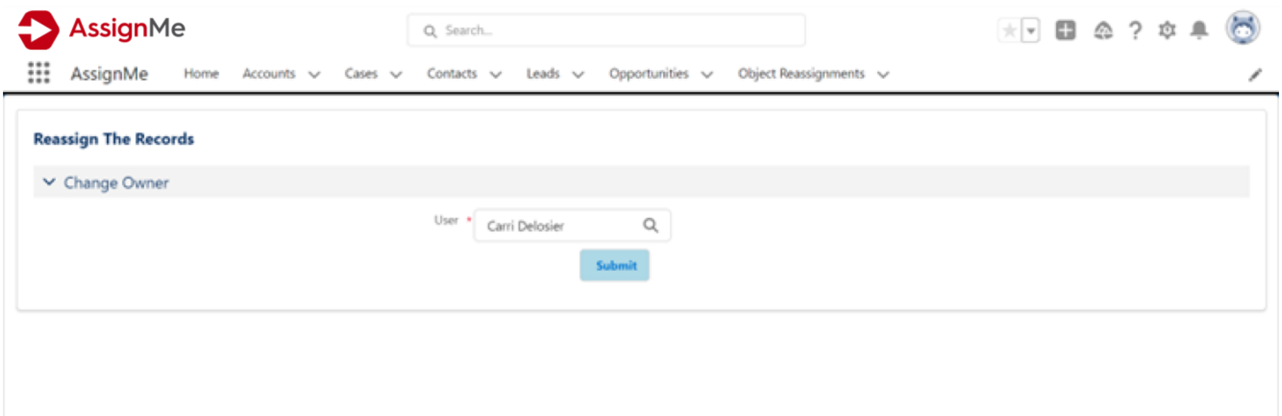
Account Records owned by the User before leaving the organization.



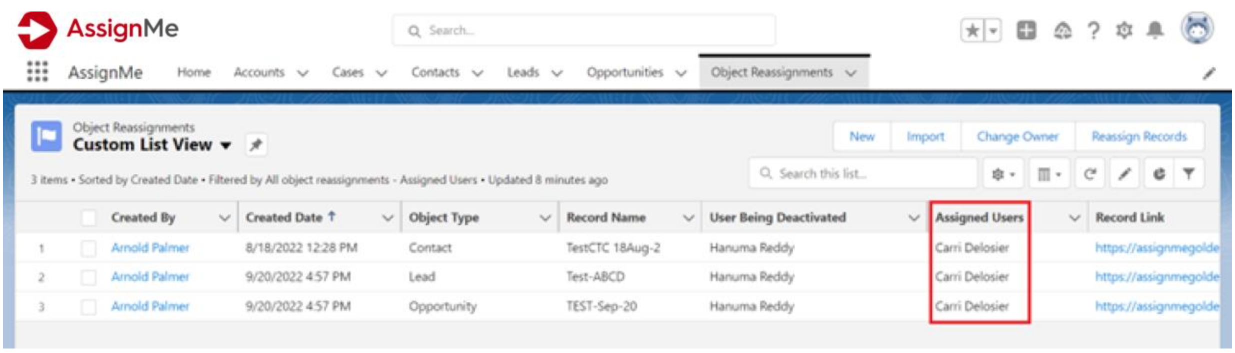
The Manager should select the records that need to be re-assigned and then click on "Reassign records" button.



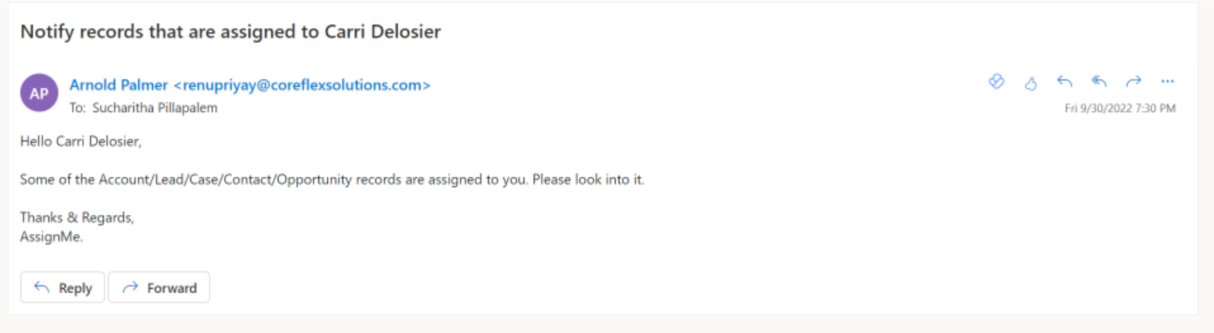
Below screenshot shows the page, that would be opened when manager select the records from 'Object Reassignment' object for reassignment of records to other users of his team.



Once the Submit button is clicked, the corresponding records will be re-assigned to **Carri Delosier.**



The User **Carri Delosier** will receive an email informing about the assignment of records.



The User needs to login to his account and work on the records that are being assigned by the Manager.