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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.

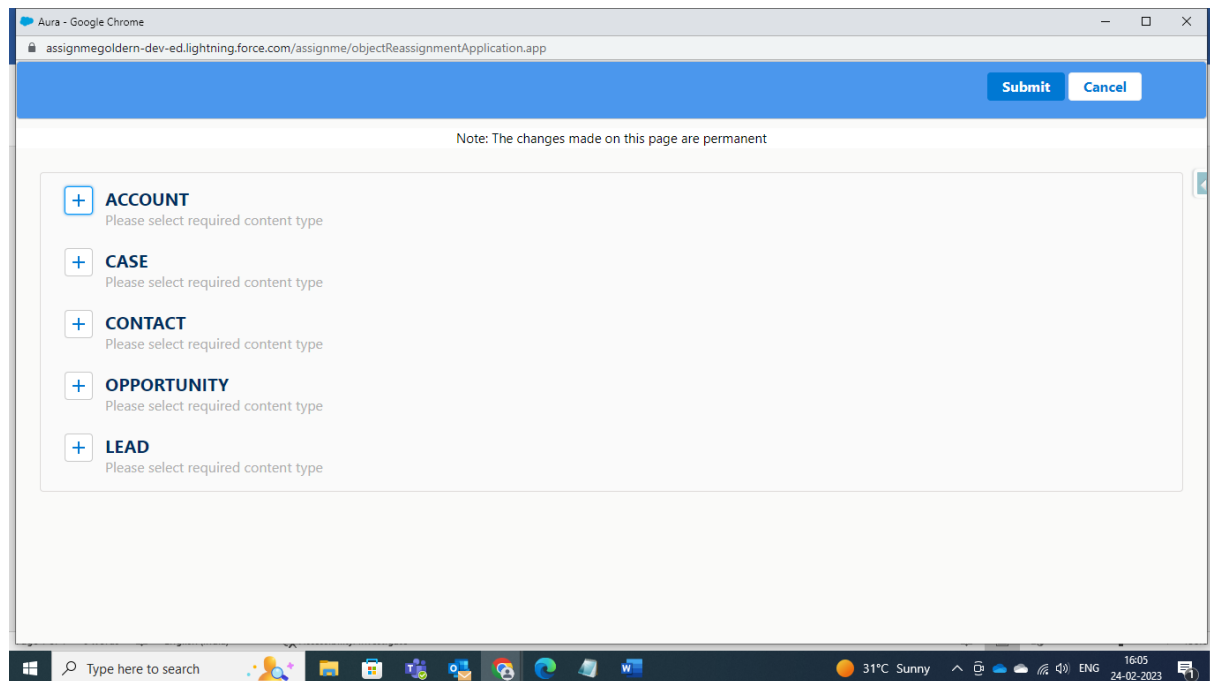
In Salesforce Lightning, navigate to Setup -> Type Installed Packages in Quick find Box -> Click on "Installed Packages->Click on "Configure"

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall Configure	AssignMeGoldenOrg	Coreflex solutions	1.0		4/4/2019 5:45 PM	✓	1	0	0	Not Applicable
Uninstall	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	8/25/2020 12:05 PM	✓	0	0	0	Not Passed

Description
This package contains Connected Applications for all the officially supported Salesforce client applications such as Touch, Salesforce for Outlook, Sa...

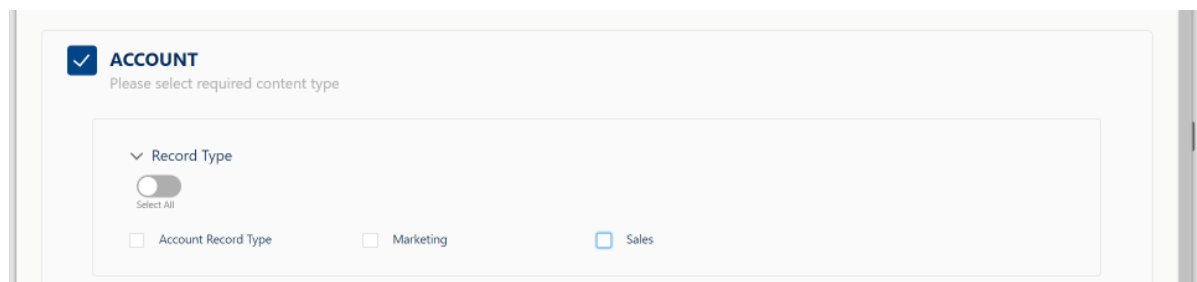
- 1) On clicking on "Configure" you will be redirected to next page where you need to select "Record Type" and "Status".
- 2) When the user leaves the Organization, Admin just needs to deactivate the user in the organization.
- 3) Deactivated user records are available in the Object Reassignment and 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.

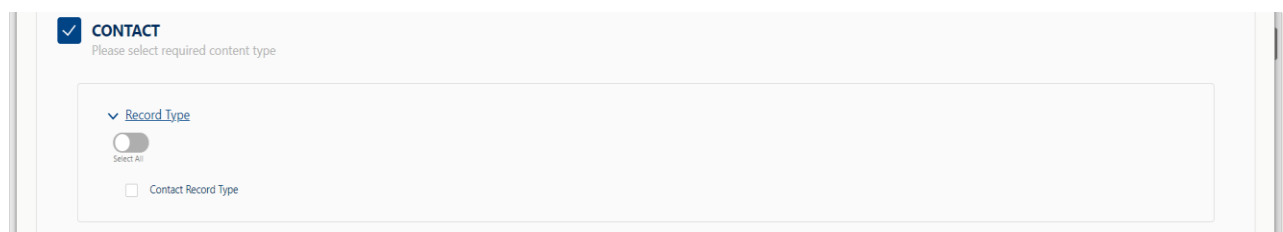


Based on the selected objects in the above step, there should be options displayed to select Record Types and status as shown below.

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

The screenshot shows the configuration interface for the 'CASE' object. At the top, there is a blue checkmark icon and the word 'CASE' in bold. Below it, the text 'Please select required content type' is displayed. A section titled 'Status' with a dropdown arrow is shown, containing a 'Select All' toggle switch. Below this, four checkboxes are listed: 'New', 'Working', 'Escalated', and 'Closed'. At the bottom of the section, there is a 'Record Type' label with a right-pointing arrow.

An Overview of Opportunity Object with its corresponding Opportunity Stages.

The screenshot shows the configuration interface for the 'OPPORTUNITY' object. At the top, there is a blue checkmark icon and the word 'OPPORTUNITY' in bold. Below it, the text 'Please select required content type' is displayed. A section titled 'Stage' with a dropdown arrow is shown, containing a 'Select All' toggle switch. Below this, eight checkboxes are listed in two columns: 'Prospecting', 'Qualification', 'Needs Analysis', 'Value Proposition', 'Id. Decision Makers', 'Perception Analysis', 'Proposal/Price Quote', and 'Negotiation/Review'. At the bottom of the section, there is a 'Record Type' label with a right-pointing arrow.

An Overview of Lead Object with its Corresponding Lead Status.

The screenshot shows the configuration interface for the 'LEAD' object. At the top, there is a blue checkmark icon and the word 'LEAD' in bold. Below it, the text 'Please select required content type' is displayed. A section titled 'Status' with a dropdown arrow is shown, containing a 'Select All' toggle switch. Below this, four checkboxes are listed: 'Open - Not Contacted', 'Working - Contacted', 'Closed - Converted', and 'Closed - Not Converted'. At the bottom of the section, there is a 'Record Types' label with a right-pointing arrow.

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

The screenshot shows the Salesforce Custom Settings page. The 'Account' object is highlighted in the table. The table has columns: Action, Label, Visibility, Settings Type, Namespace Prefix, Description, Record Size, Number of Records, and Total Size.

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Edt Manage	Account	Public	List	assignme	Account Object	250	3	750
Edt Manage	Case	Public	List	assignme	Case Object	400	0	0
Edt Manage	Contact	Public	List	assignme	Contact Object	250	0	0
Edt Manage	Call	Public	Hierarchy	assignme	Stores the case object url	355	1	355
Edt Manage	Lead	Public	List	assignme	Lead Object	400	0	0
Edt Manage	ObjReassignment	Public	Hierarchy	assignme	Custom ObjReassignment	355	1	355
Edt Manage	Opportunity	Public	List	assignme	Opportunity Object	400	0	0
Edt Manage	Standardobjects	Public	List	assignme	Standard Object selected from the configuration page	250	0	0

Click on Account Object

The screenshot shows the Salesforce Custom Settings page with the 'Account' object highlighted. The table has columns: Action, Label, Visibility, Settings Type, Namespace Prefix, Description, Record Size, Number of Records, and Total Size.

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Edt Manage	Account	Public	List	assignme	Account Object	250	3	750
Edt Manage	Case	Public	List	assignme	Case Object	400	0	0
Edt Manage	Contact	Public	List	assignme	Contact Object	250	0	0
Edt Manage	Call	Public	Hierarchy	assignme	Stores the case object url	355	1	355
Edt Manage	Lead	Public	List	assignme	Lead Object	400	0	0
Edt Manage	ObjReassignment	Public	Hierarchy	assignme	Custom ObjReassignment	355	1	355
Edt Manage	Opportunity	Public	List	assignme	Opportunity Object	400	0	0
Edt Manage	Standardobjects	Public	List	assignme	Standard Object selected from the configuration page	250	0	0

Click on Manage

The screenshot shows the Salesforce Setup interface for Custom Settings. The left sidebar has a search bar and a navigation menu with 'Custom Settings' selected. The main content area is titled 'Custom Settings' and 'Account'. It displays the 'Custom Setting Definition Detail' for the 'Account' object. The 'Manage' button is highlighted with a red box. Below this, the 'Custom Fields' section shows a table with columns: Action, Field Label, API Name, Data Type, Indexed, and Modified By. The table contains one row for the field 'assignme__Assignme_Record_type__c' with a data type of 'Text(150)' and a modified date of '6/6/2019 2:28 PM'.

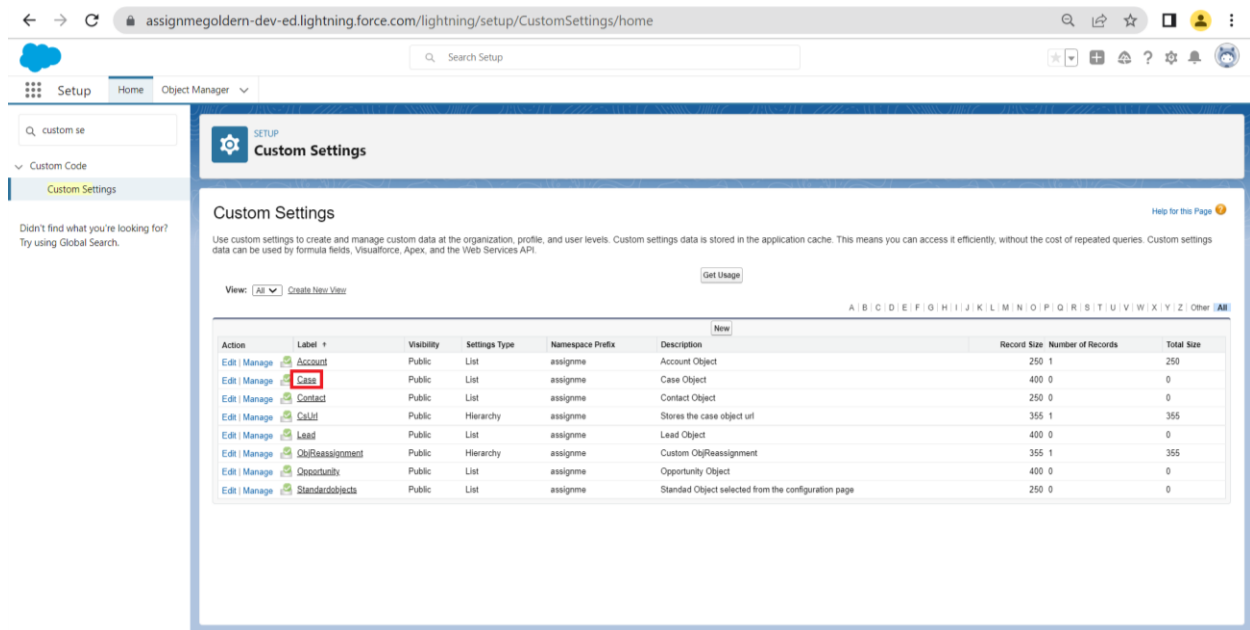
Action	Field Label	API Name	Data Type	Indexed	Modified By
Edit	Record Type	assignme__Assignme_Record_type__c	Text(150)		Arnold Palmer: 6/6/2019 2:28 PM

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

The screenshot shows the Salesforce Setup interface for Custom Settings. The left sidebar has a search bar and a navigation menu with 'Custom Settings' selected. The main content area is titled 'Custom Settings' and 'Account'. It displays the 'Custom Setting Definition Detail' for the 'Account' object. The 'Manage' button is highlighted with a red box. Below this, the 'Custom Fields' section shows a table with columns: Action, Name, and a 'New' button. The table contains one row for the field 'Sales' with a data type of 'Text(150)' and a modified date of '6/6/2019 2:28 PM'.

Action	Name
Edit	Sales

Select and click on Case



The screenshot shows the Salesforce Custom Settings page. The left sidebar contains a search bar and a list of custom settings. The main content area displays a table of custom settings. The 'Case' setting is highlighted with a red box.

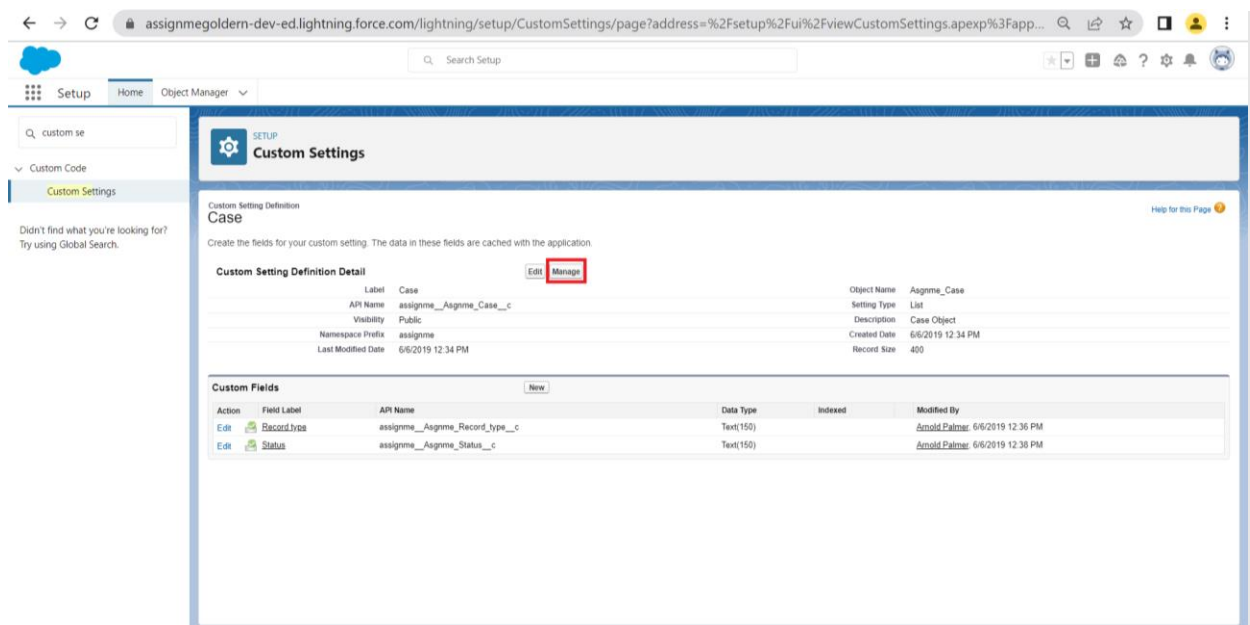
Custom Settings

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Web Services API.

View: [All](#) [Create New View](#) [Get Usage](#)

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Size
Edit Manage	Account	Public	List	assignme	Account Object	250	1	250
Edit Manage	Case	Public	List	assignme	Case Object	400	0	0
Edit Manage	Contact	Public	List	assignme	Contact Object	250	0	0
Edit Manage	CaseList	Public	Hierarchy	assignme	Stores the case object url	355	1	355
Edit Manage	Lead	Public	List	assignme	Lead Object	400	0	0
Edit Manage	ObjReassignment	Public	Hierarchy	assignme	Custom ObjReassignment	355	1	355
Edit Manage	Opportunity	Public	List	assignme	Opportunity Object	400	0	0
Edit Manage	Standardobjects	Public	List	assignme	Standard Object selected from the configuration page	250	0	0

Click on Manage



The screenshot shows the Salesforce Custom Setting Definition page for the 'Case' custom setting. The left sidebar contains a search bar and a list of custom settings. The main content area displays the 'Custom Setting Definition Detail' and 'Custom Fields' sections. The 'Manage' link is highlighted with a red box.

Custom Setting Definition

Case

Create the fields for your custom setting. The data in these fields are cached with the application.

[Edit](#) [Manage](#)

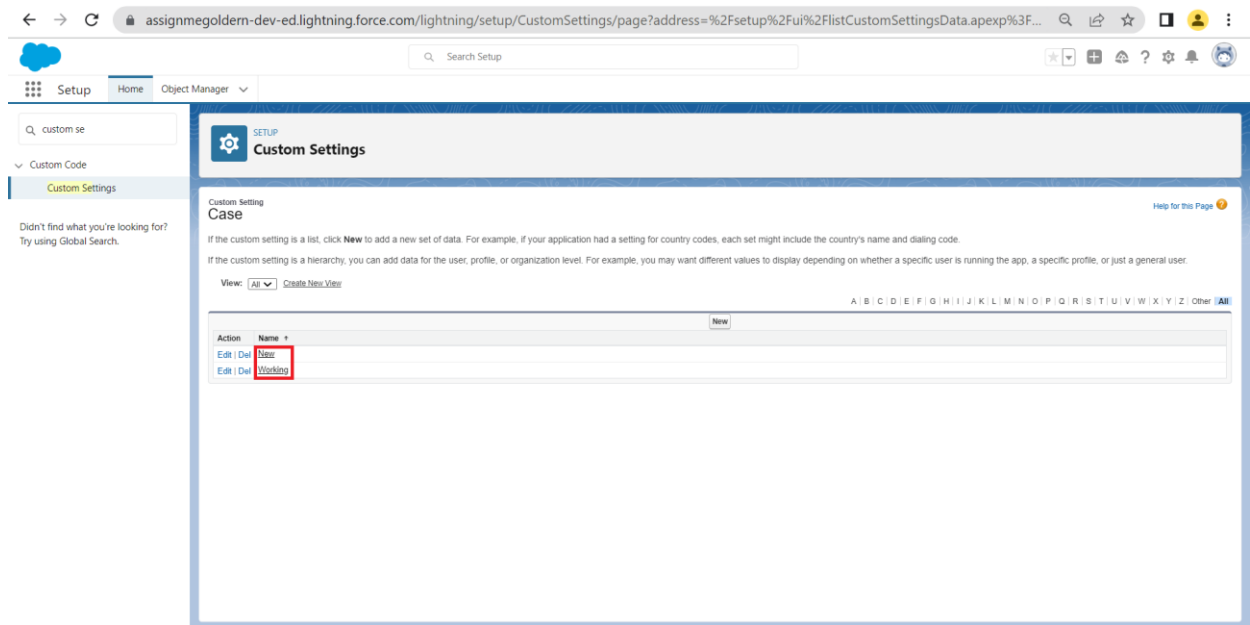
Custom Setting Definition Detail

Label	Case	Object Name	Assignme_Case
API Name	assignme__Assignme_Case__c	Setting Type	List
Visibility	Public	Description	Case Object
Namespace Prefix	assignme	Created Date	6/6/2019 12:34 PM
Last Modified Date	6/6/2019 12:34 PM	Record Size	400

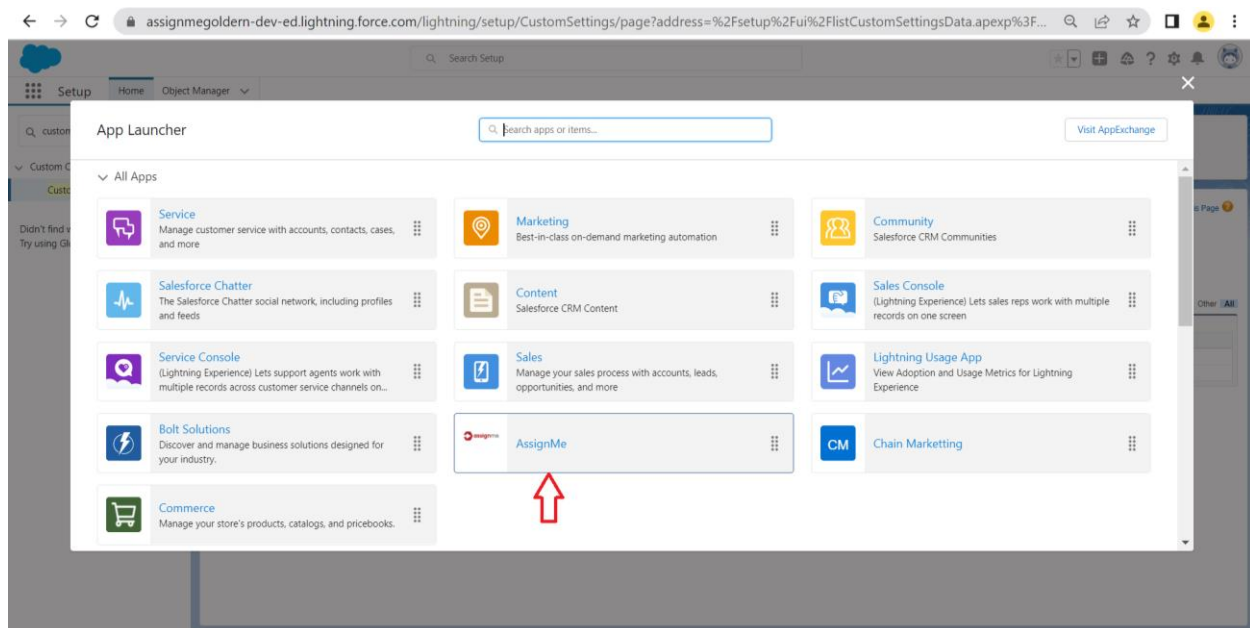
Custom Fields

Action	Field Label	API Name	Data Type	Indexed	Modified By
Edit	Record type	assignme__Assignme_Record_type__c	Text(150)		Arnold Palmer 6/6/2019 12:36 PM
Edit	Status	assignme__Assignme_Status__c	Text(150)		Arnold Palmer 6/6/2019 12:36 PM

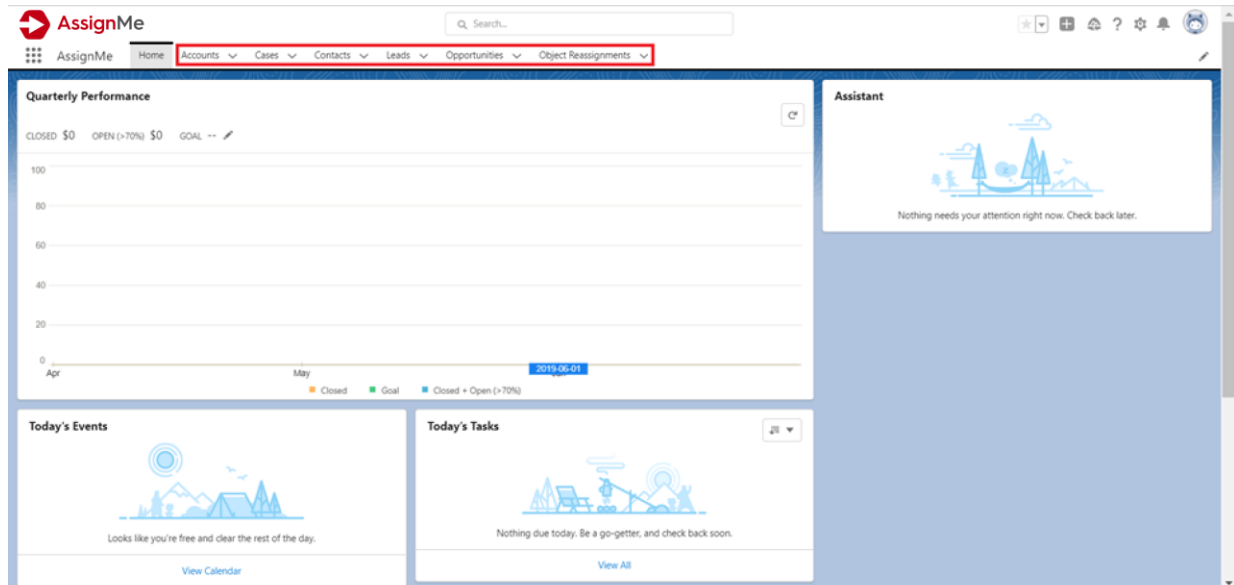
The “New” and “Working” Case Status which is selected during the configuration is stored here.



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

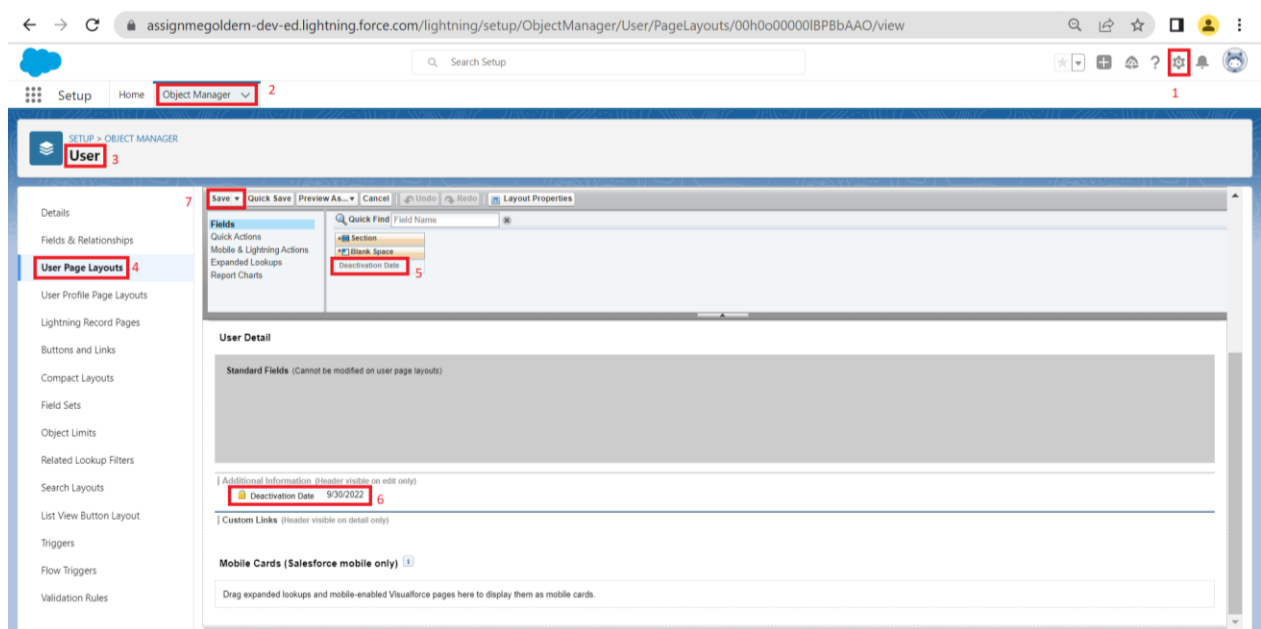


You will get Accounts, Cases, Contacts, Leads, Opportunities and Object Reassignments Tabs.



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.

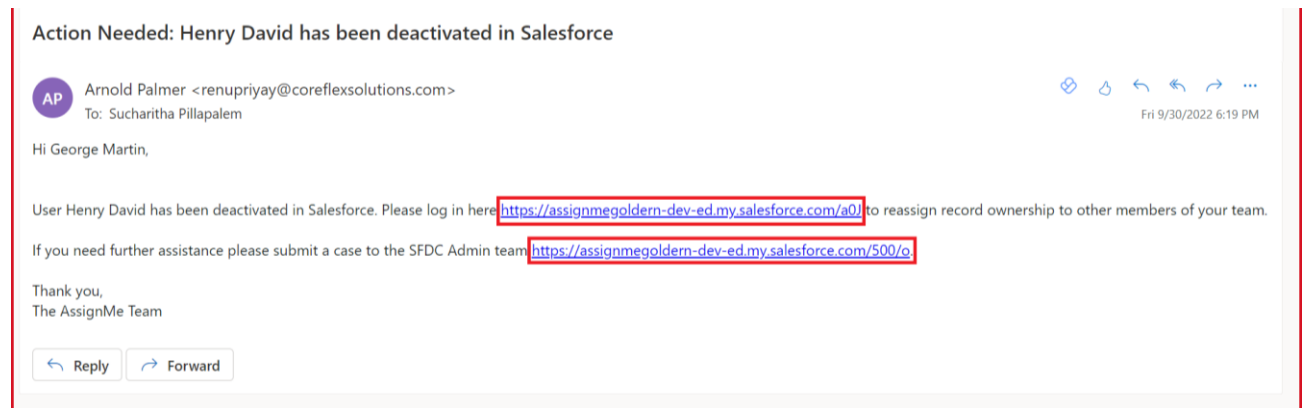
Go to Set up -> Home -> User in Quick find Box -> Users



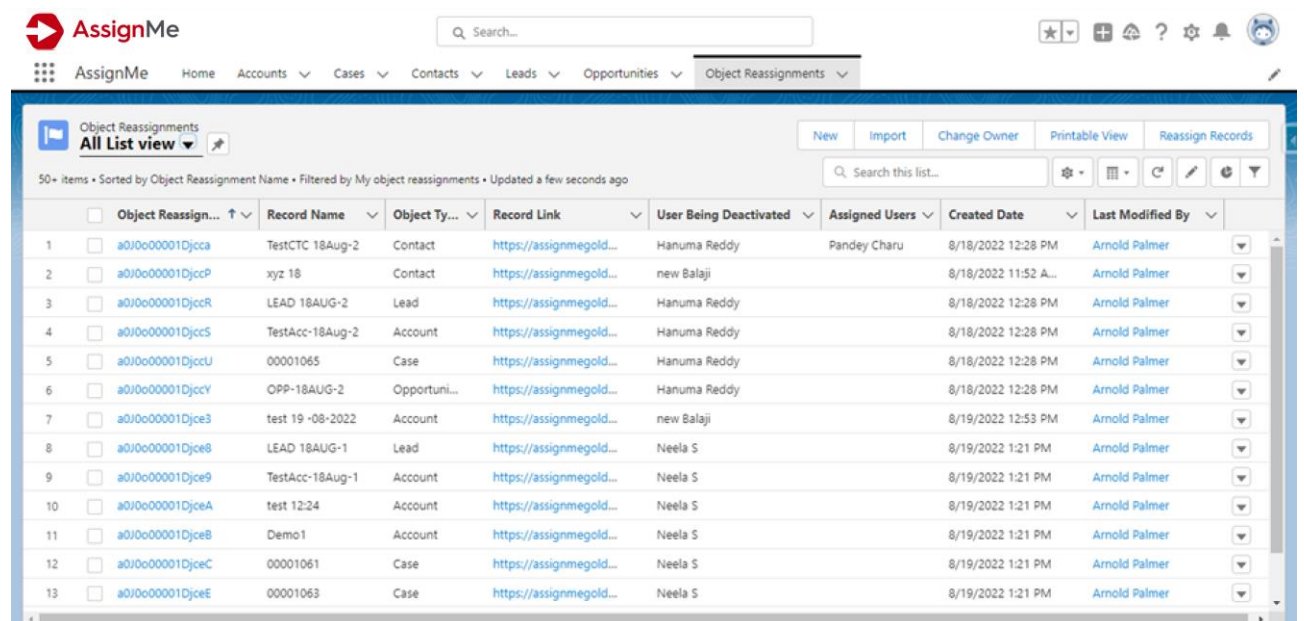
The System Admin should uncheck the “Active” check box and click on “Save” button.



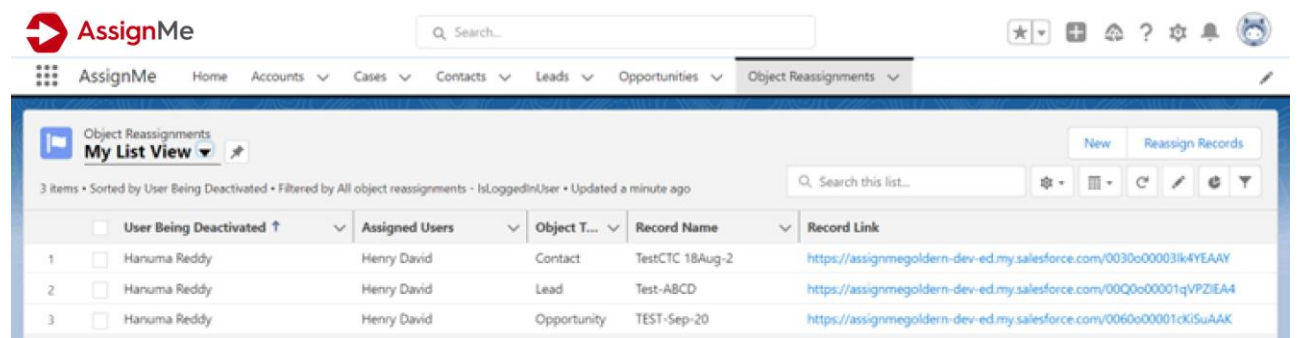
An Email notification is sent to the respective Manager informing her/him about the Re-assignment of records and to submit a Case for further help.



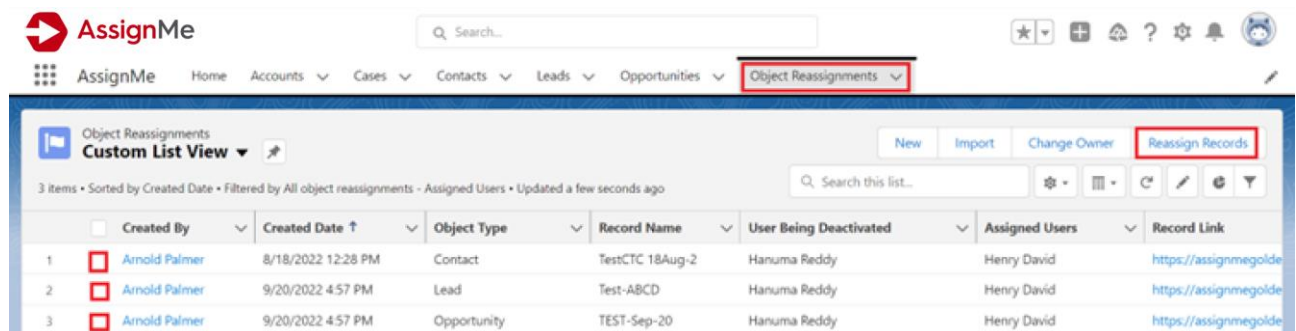
When the Manager logs in with the URL sent to the email, he/she will be automatically redirected to "Object Reassignment" Object.



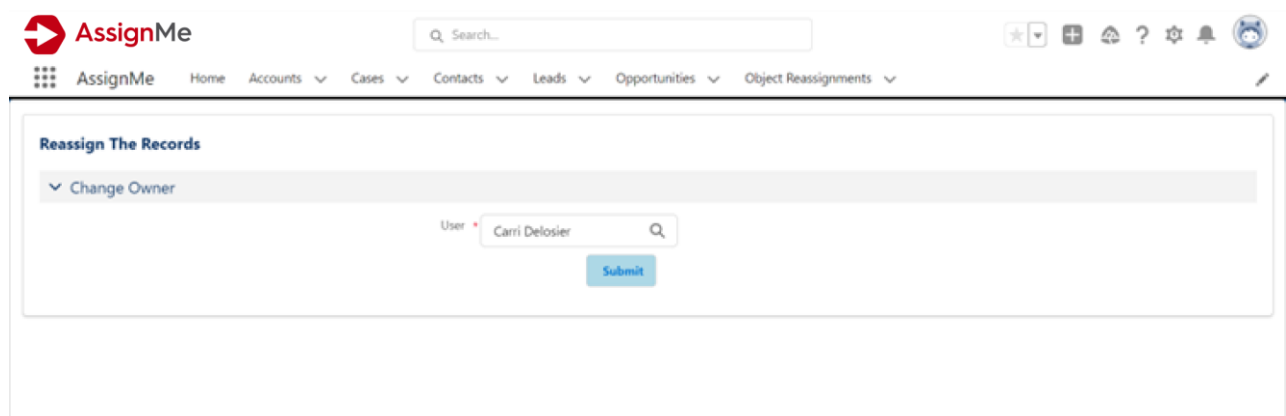
Account Records owned by the User before leaving the organization.



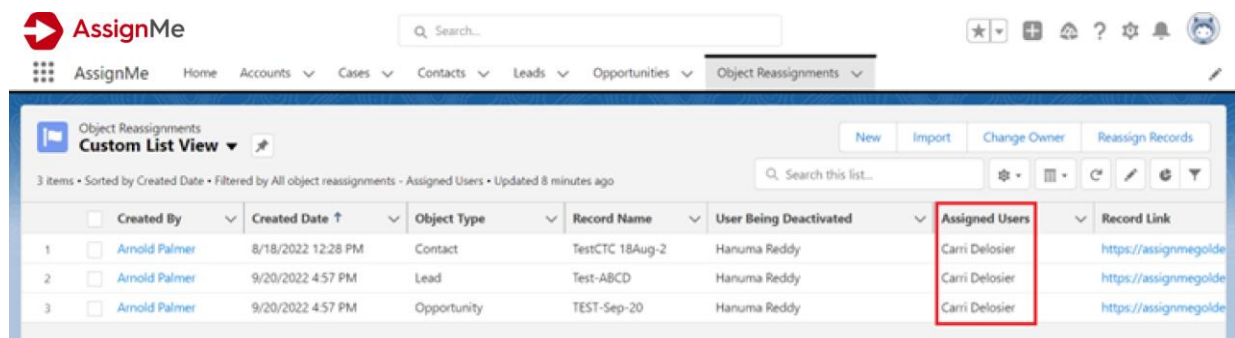
The Manager should select the records that need to be re-assigned and then click on "Reassign records" button.



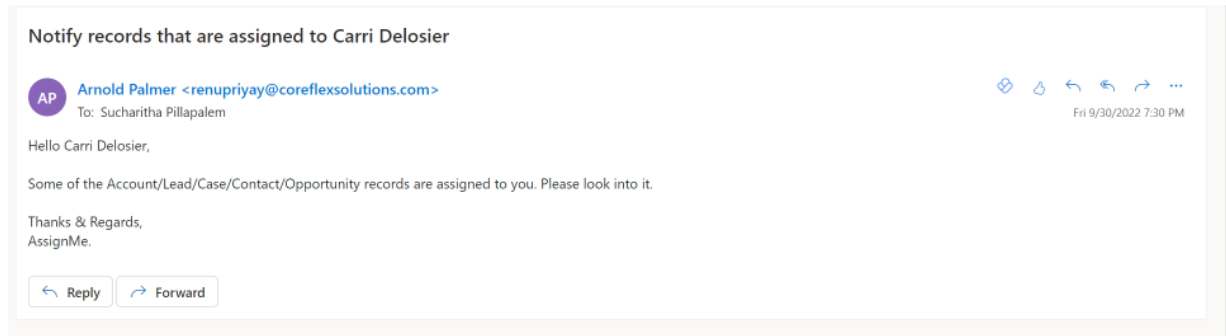
Below screenshot shows the page, that would be opened when manager select the records from 'Object Reassignment' object for reassignment of records to other users of his team.



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.