



Round Robin Rules Manual



877 · 738 · 2869 x 700 sales@topshelfcrm.com
WWW.TOPSHELFCRM.COM   



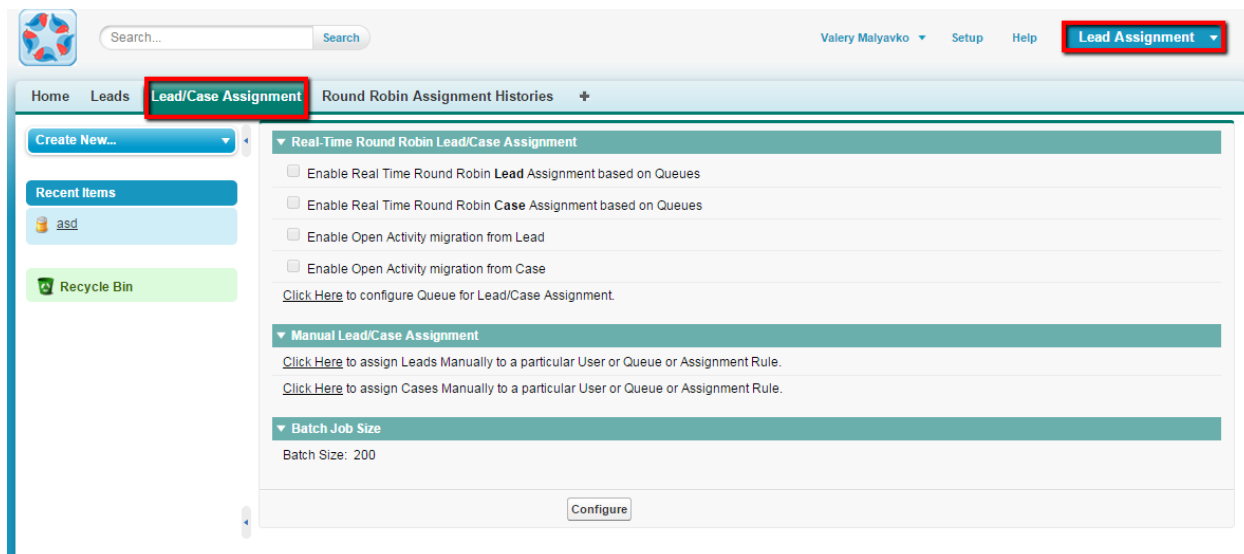
Overview

Round Robin Rules allows the ability to easily, evenly, accurately and automatically assign Leads and Cases. We take the pain out of record assignment and make selling easy again!

- **Round Robin Rules** allows administrators to easily assign Leads and Cases from terminated/inactive users via the assignment rules or to assign records to specific individual users. Without the app, each time an employee is terminated, administrators are left to spend long hours running reports to extract records assigned to terminated users, manually calculate the amount of records that should be distributed to active reps, and then manually assign these records. Now, all of this work can be done with the simple click of a button in our app.
- **Round Robin Rules** allows administrators to easily assign records from active users to specific individual users. The quantity of records assigned can be specified in any integer or multiples of 25, ranging from 25 to 100. This saves administrators' countless hours spent on manually assigning records to individual users.
- **Round Robin Rules** allows a truly even distribution of records that is not otherwise possible. Without the app, there is a no definitive way to confirm that records are being assigned in a true round robin fashion. Our app contains new custom fields, a custom objects field and APEX code that makes the round robin record assignment possible. The app can easily be modified to specify which Lead/Case sources should be referenced by Round Robin Rules.

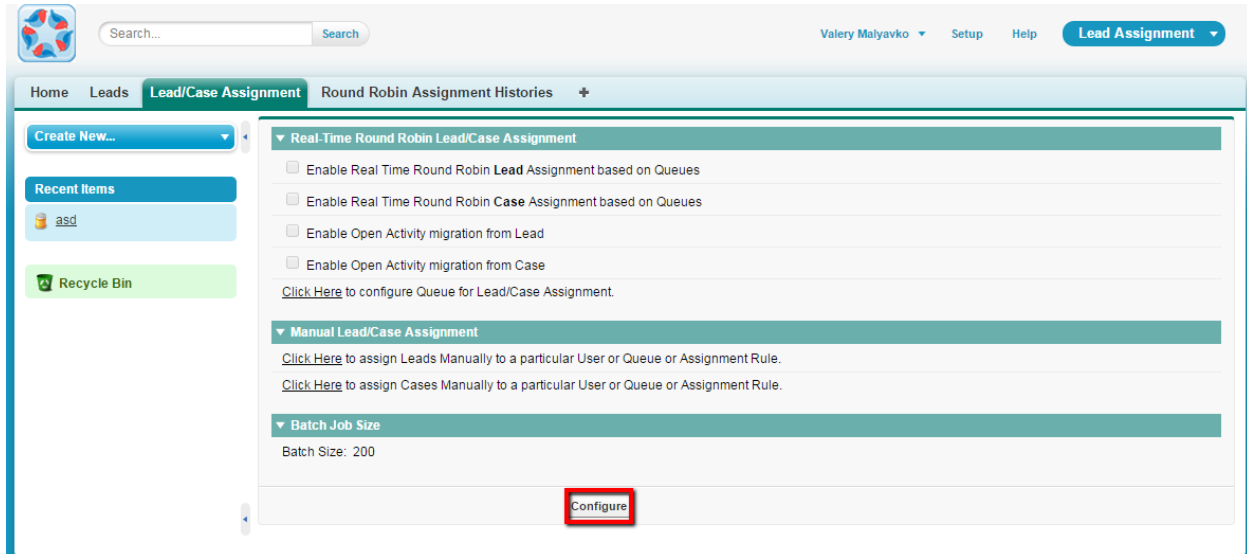
Instructions

Step 1: Select the **Lead/Case Assignment** app tab in the top right corner of the homepage.

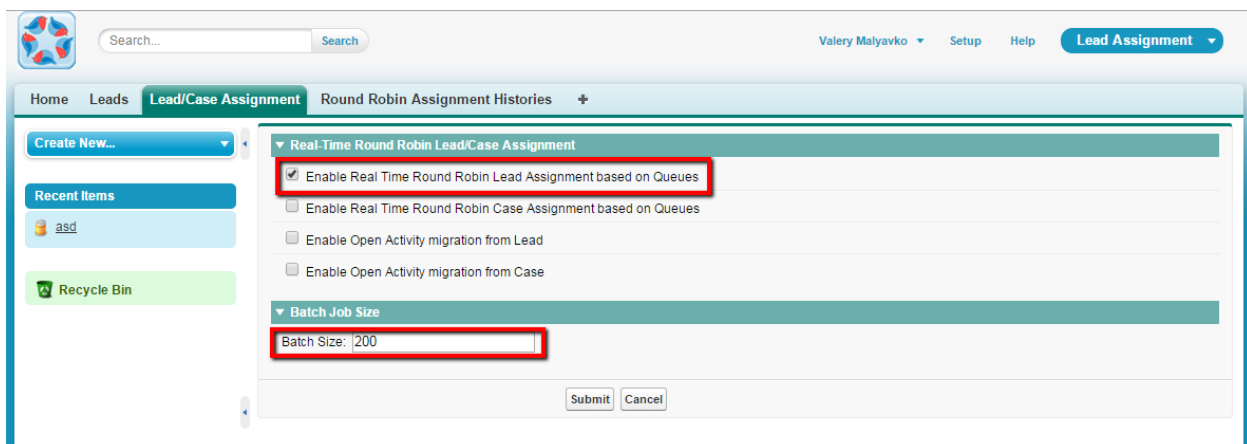


ROUND ROBIN RULES MANUAL

Step 2: Click on the button, “Configure”, to enable the real-time round robin assignment based on Queue and to specify the default batch size for manual lead assignment process.



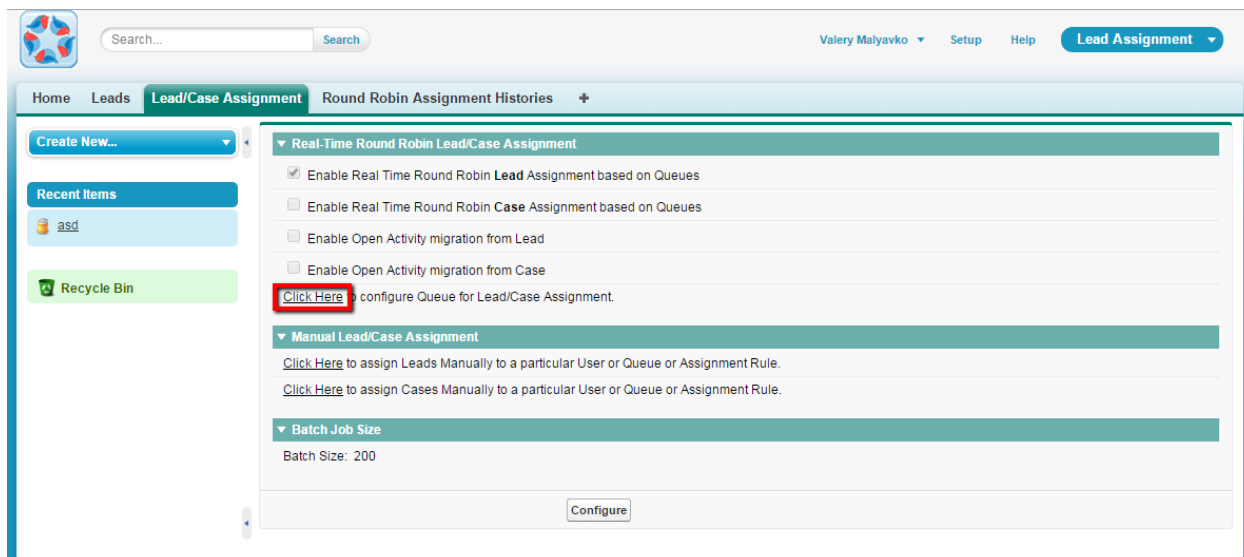
The screenshot shows the 'Lead Assignment' configuration page. The left sidebar contains a search bar, a 'Create New...' button, and a 'Recent Items' list. The main content area has tabs for 'Home', 'Leads', 'Lead/Case Assignment', and 'Round Robin Assignment Histories'. Under the 'Lead/Case Assignment' tab, there are three sections: 'Real-Time Round Robin Lead/Case Assignment', 'Manual Lead/Case Assignment', and 'Batch Job Size'. The 'Real-Time Round Robin Lead/Case Assignment' section contains four checkboxes: 'Enable Real Time Round Robin Lead Assignment based on Queues', 'Enable Real Time Round Robin Case Assignment based on Queues', 'Enable Open Activity migration from Lead', and 'Enable Open Activity migration from Case'. The 'Batch Job Size' section shows 'Batch Size: 200'. A red box highlights the 'Configure' button at the bottom right of the configuration area.



The screenshot shows the 'Lead Assignment' configuration page after the 'Configure' button was clicked. The 'Enable Real Time Round Robin Lead Assignment based on Queues' checkbox is now checked. The 'Batch Size' input field is also highlighted with a red box. The 'Submit' and 'Cancel' buttons are visible at the bottom right of the configuration area.

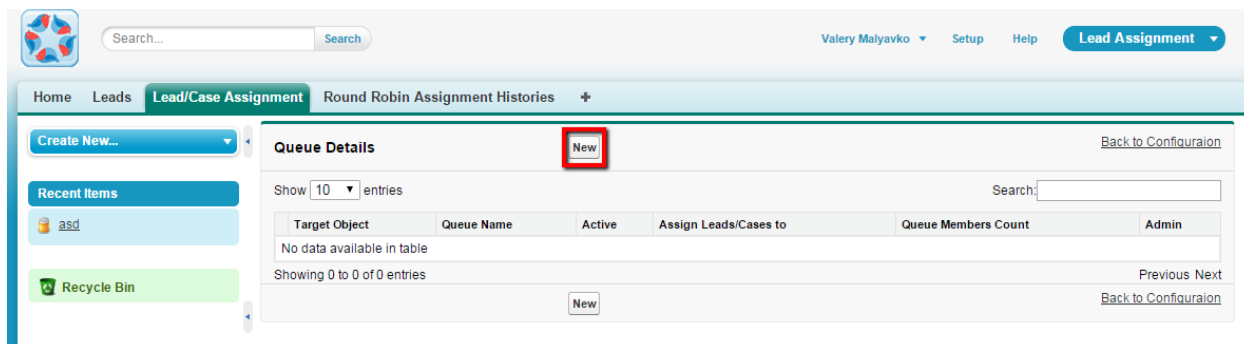
ROUND ROBIN RULES MANUAL

Step 3: Click on the button, “Click Here to configure Queue for Lead/Case Assignment”, to configure round robin lead assignment process based on Queue.



The screenshot shows the 'Lead/Case Assignment' configuration page. The 'Click Here' link to configure the queue is highlighted with a red box.

Step 4: Click on the button, “New”, to configure the new queue. Click on the “Edit” link to manage existing the Queue configuration.

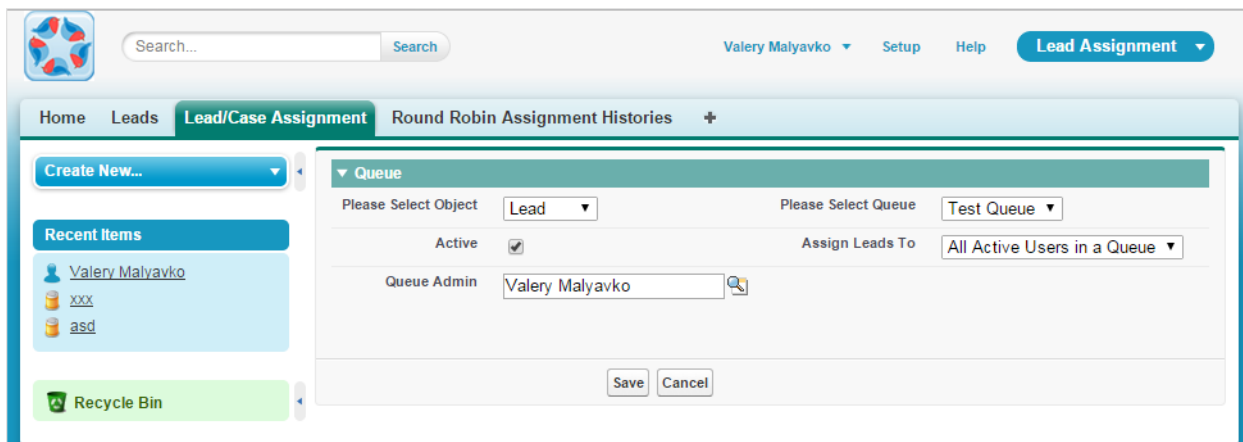


The screenshot shows the 'Queue Details' page. The 'New' button is highlighted with a red box.

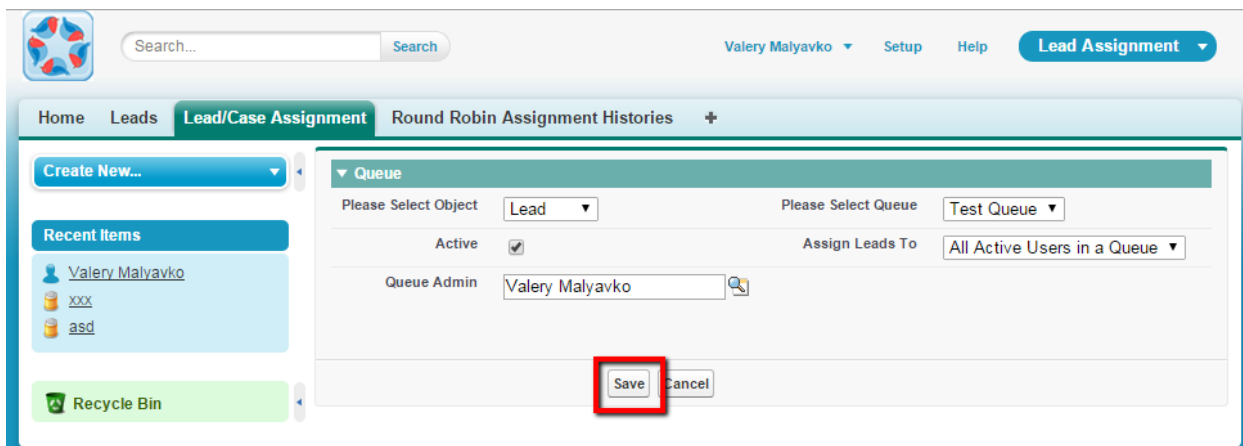
Target Object	Queue Name	Active	Assign Leads/Cases to	Queue Members Count	Admin
No data available in table					

ROUND ROBIN RULES MANUAL

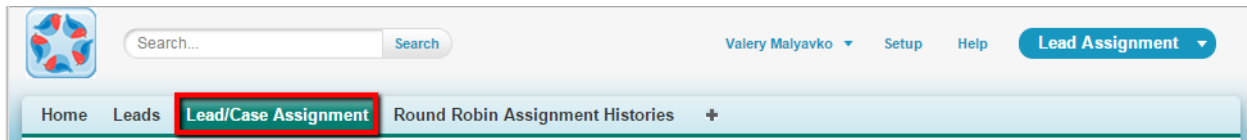
Step 5: Select users in a Queue to participate in the round robin assignment. To enable round robin assignment for this queue, verify that the 'Active' checkbox is checked. Select a Queue Admin user to receive any assignment failure emails related to this queue.



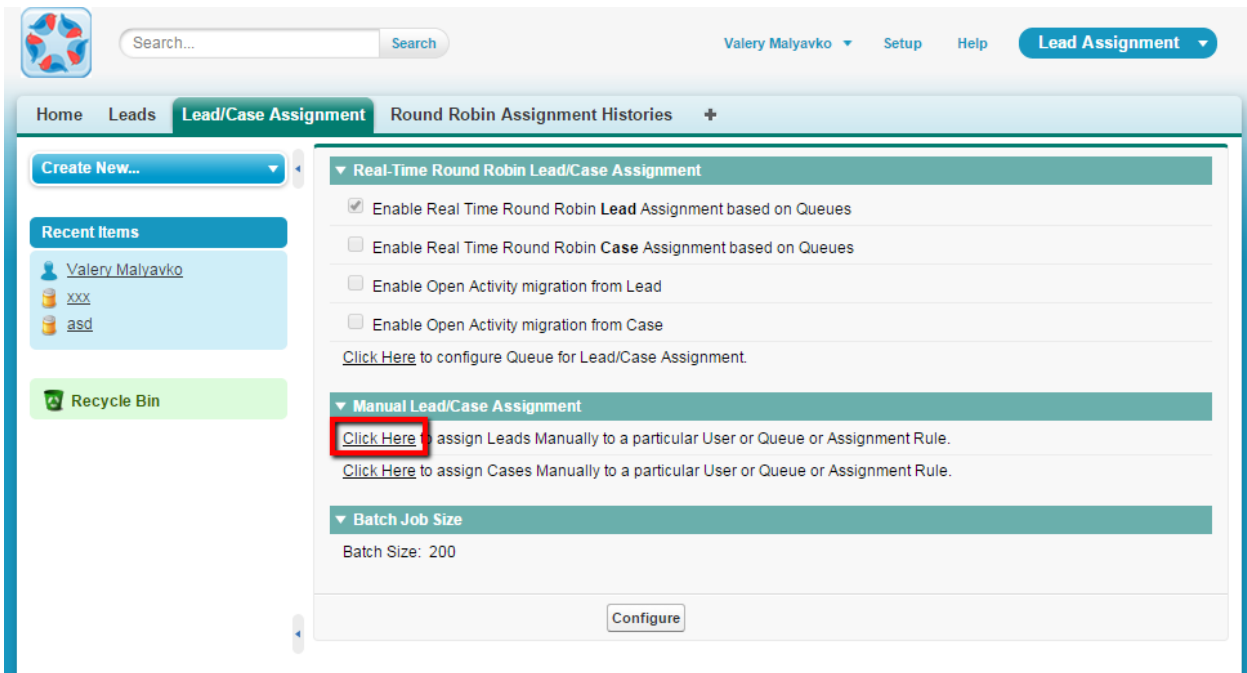
Click the "Save" button.



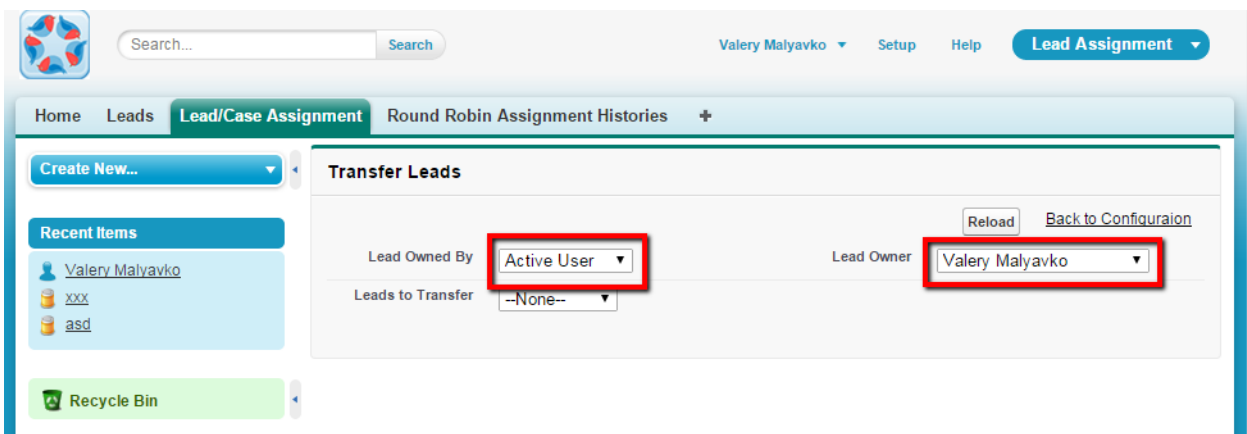
Step 6: Select the **Lead/Case Assignment** app tab in the top right corner of the homepage.



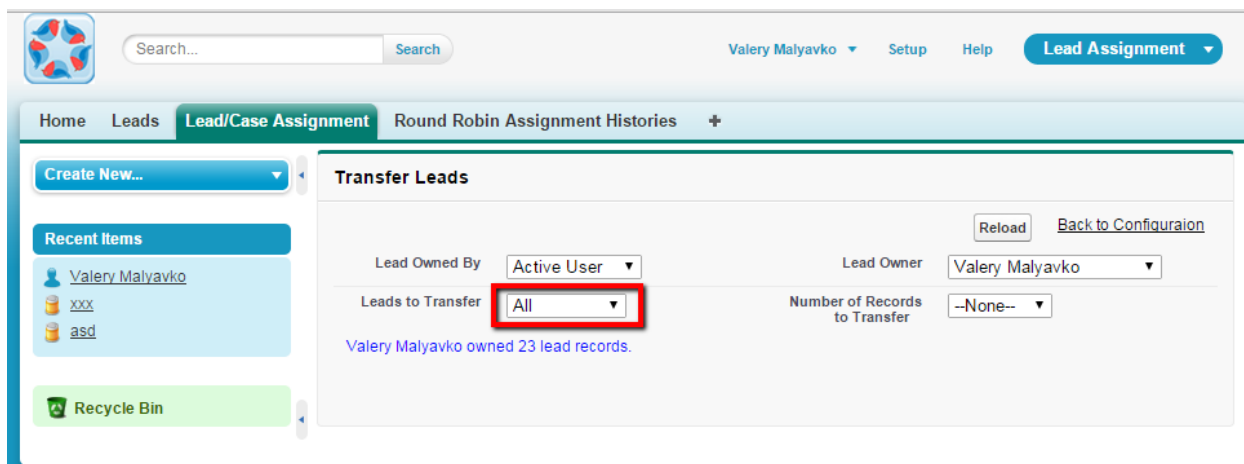
To transfer the Leads or Cases manually, click on the button, “Click Here to configure Queue for Lead/Case Assignment”.



Step 7: To transfer Leads or Cases from a particular user/queue, select the appropriate values in the “Lead Owned By”, “Case Owned By”, “Lead Owner” and “Case Owner” picklists.

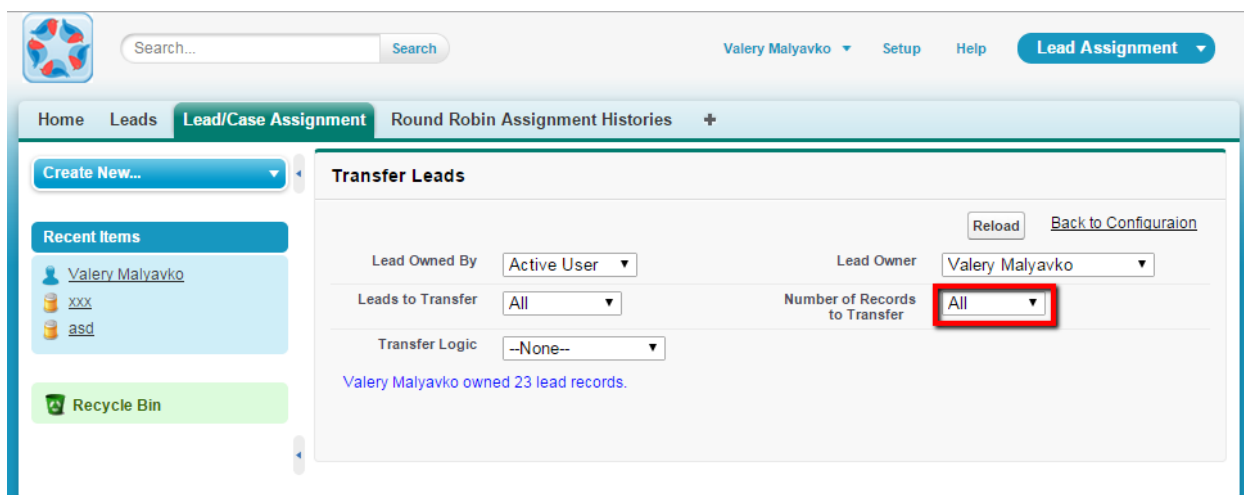


Step 8: To transfer all Leads or Cases that are owned by a selected user/queue, select “All” in the picklist, “Leads to Transfer” or “Cases to Transfer”. To transfer Leads or Cases based on filter condition (e.g. **Lead Email** is not equal to *Blank*), click “Selected Leads” or “Selected Cases” in the “Leads to Transfer” or “Cases to Transfer” picklist and set the appropriate condition in the Search Criteria section.



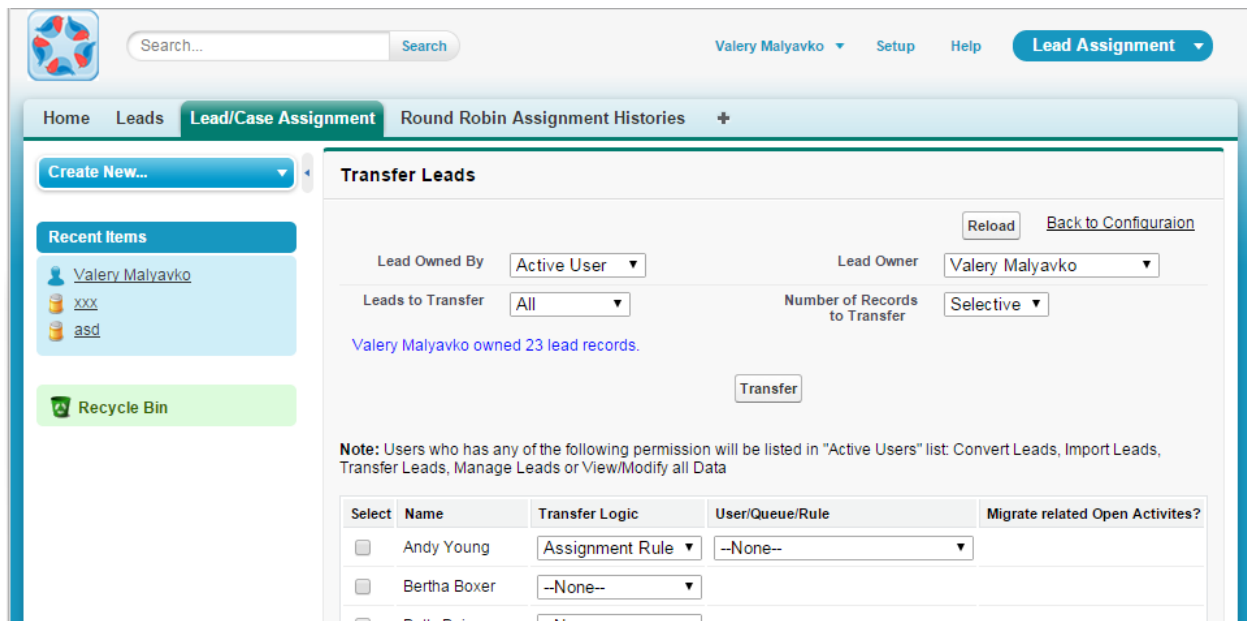
The screenshot shows the 'Lead Assignment' interface. The 'Transfer Leads' section is active. The 'Leads to Transfer' dropdown is set to 'All' and is highlighted with a red box. The 'Lead Owner' is 'Valery Malyavko' and the 'Number of Records to Transfer' is '--None--'. The 'Lead Owned By' is 'Active User'. The 'Transfer Logic' is '--None--'. The 'Recycle Bin' button is visible at the bottom left.

Step 9: Select the number of records that you would like to transfer.



The screenshot shows the 'Lead Assignment' interface. The 'Transfer Leads' section is active. The 'Number of Records to Transfer' dropdown is set to 'All' and is highlighted with a red box. The 'Leads to Transfer' is 'All' and the 'Transfer Logic' is '--None--'. The 'Recycle Bin' button is visible at the bottom left.

Step 10: Leads or Cases can be transferred using an assignment rule or the ability to transfer to an active user or queue. If the 'Number of Records to Transfer' picklist is not specified, the selected number of records will transfer as a bulk process. If the "Number of Records to Transfer" is specified, all of the specified records will be transferred. You also have the ability to specify which leads you would like transferred along with specific assignment rules or active users or queues.



The screenshot shows the 'Transfer Leads' interface. On the left, there's a sidebar with 'Recent Items' (Valery Malyavko, xxx, asd) and a 'Recycle Bin'. The main area has a 'Transfer Leads' section with the following fields:

- Lead Owned By:** Active User (dropdown)
- Lead Owner:** Valery Malyavko (dropdown)
- Leads to Transfer:** All (dropdown)
- Number of Records to Transfer:** Selective (dropdown)

Below these fields, it states: "Valery Malyavko owned 23 lead records." and a "Transfer" button.

Note: Users who has any of the following permission will be listed in "Active Users" list: Convert Leads, Import Leads, Transfer Leads, Manage Leads or View/Modify all Data

Select	Name	Transfer Logic	User/Queue/Rule	Migrate related Open Activities?
☐	Andy Young	Assignment Rule	--None--	
☐	Bertha Boxer	--None--		

Technical Design

Using this app, the user can perform lead and case owner assignment in real time (using Round Robin Rules) or manually (assigning to a particular user or using assignment rules or Round Robin Rules).