Round Robin Rules Manual

CALL OR EMAIL FOR DETAILS
877 · 738 · 2869 x 700 sales@topshelfcrm.com
WWW.TOPSHELFCRM.COM

TOP SHELF CRM

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!

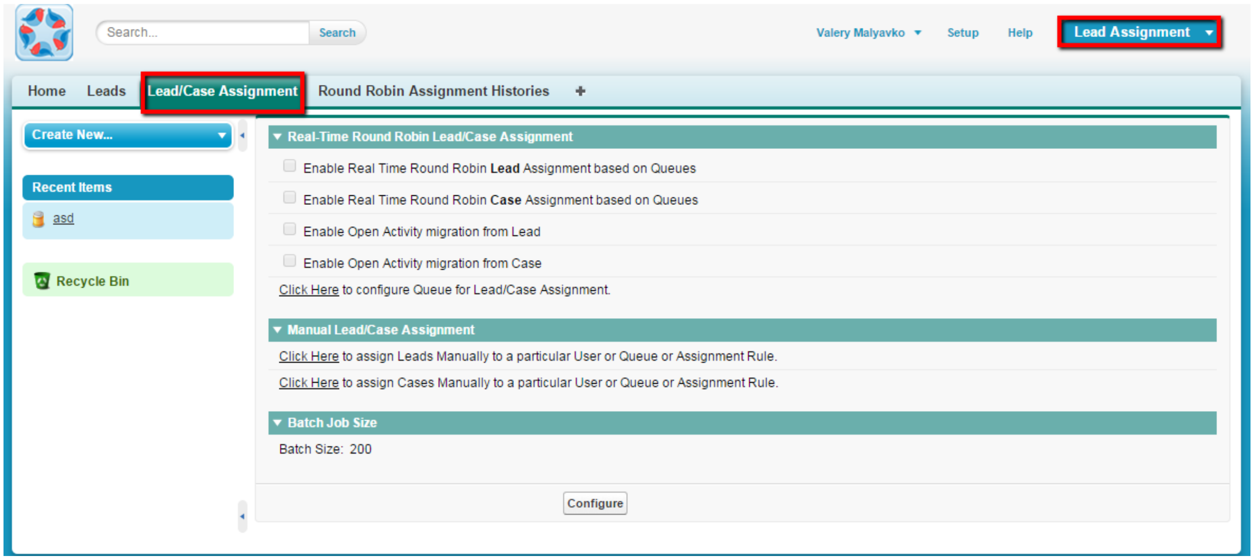
- **Round Robin Rules** allows administrators to easily assign Leads and Cases from terminated/inactive users via the assignment rules or to assign records to specific individual users. Without the app, each time an employee is terminated, administrators are left to spend long hours running reports to 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.

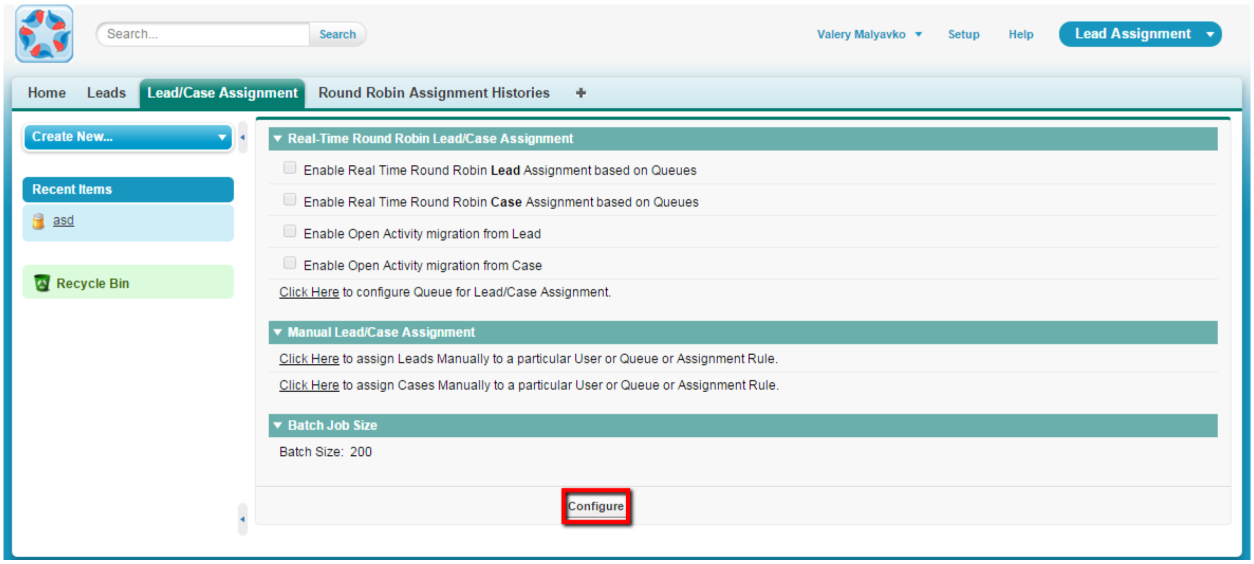
- **Round Robin Rules** allows a truly even distribution of records that is not otherwise possible. Without the app, there is a no definitive way to confirm that records are being assigned in a true round robin fashion. Our app contains new custom fields, a custom objects field and APEX code that makes 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.

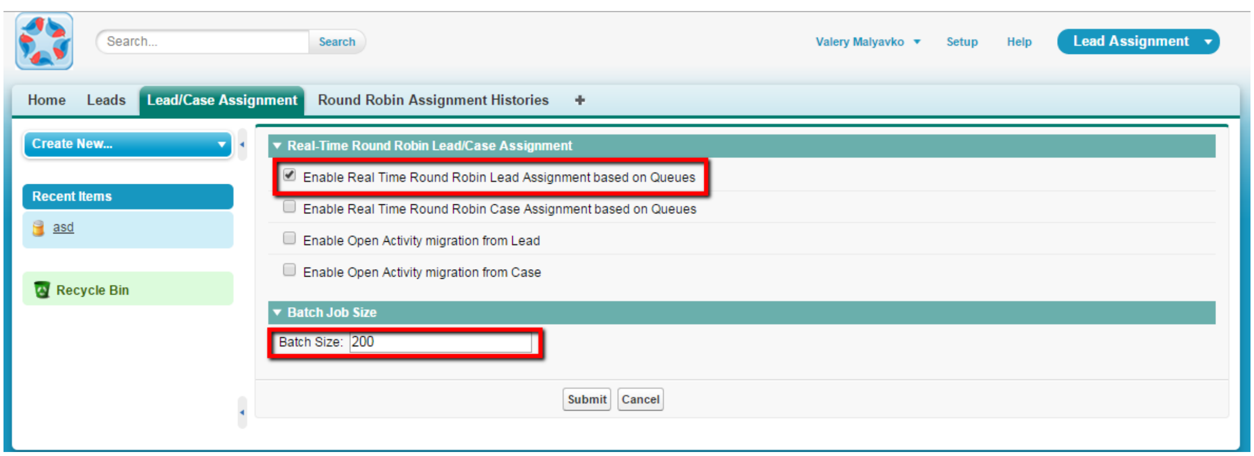
Instructions

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

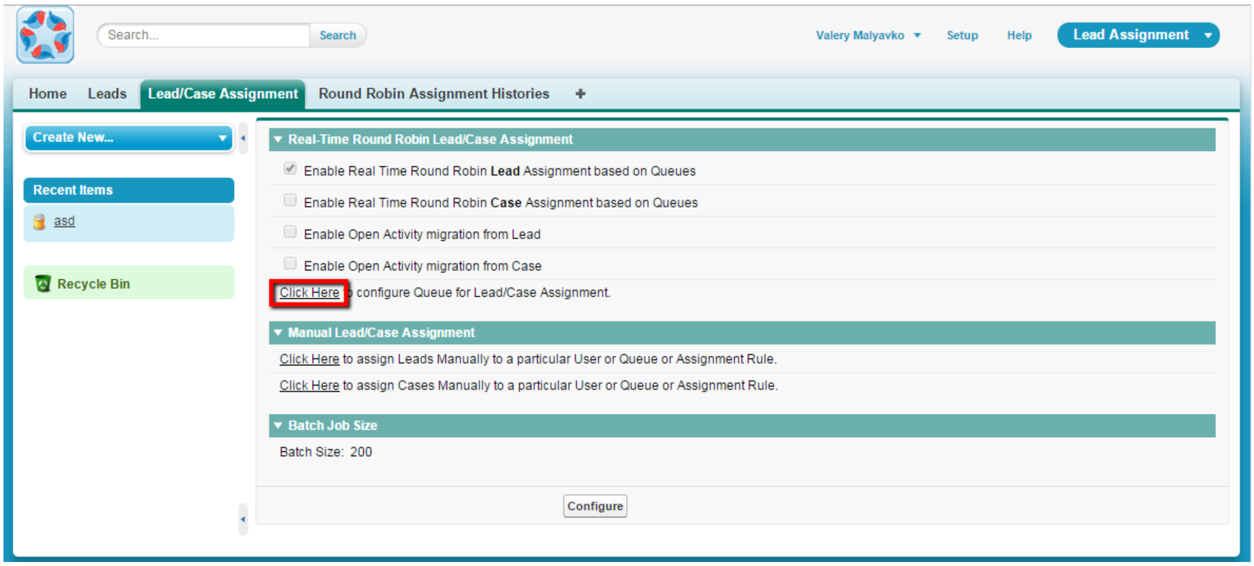


Step 2: Click on the button, “Configure”, to enable the real-time round robin assignment based on Queue and to specify the default batch size for manual lead assignment process.

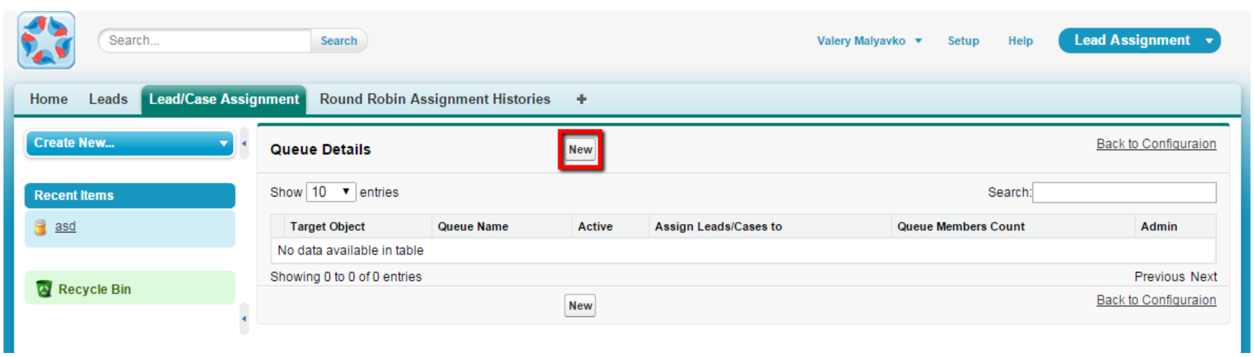




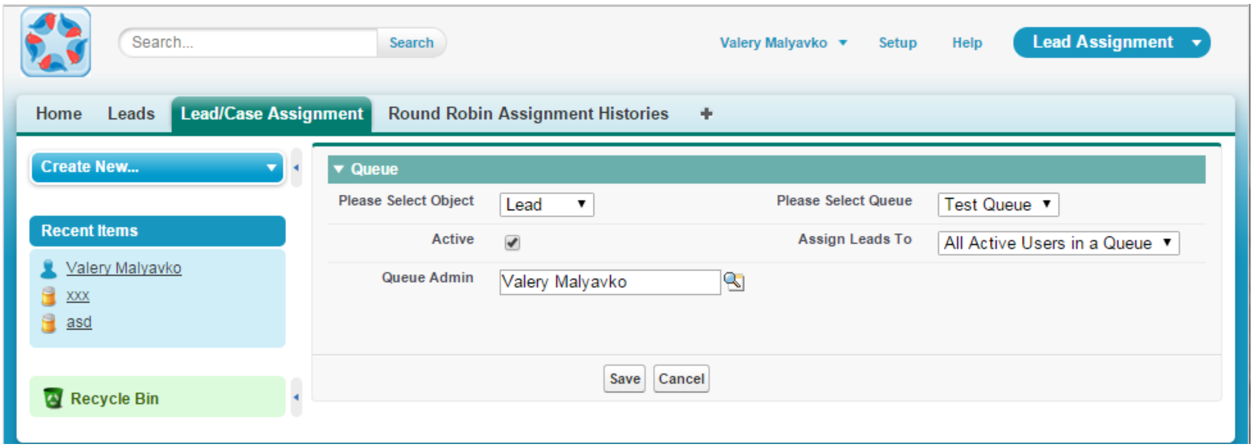
Step 3: Click on the button, “Click Here to configure Queue for Lead/Case Assignment”, to configure round robin lead assignment process based on Queue.



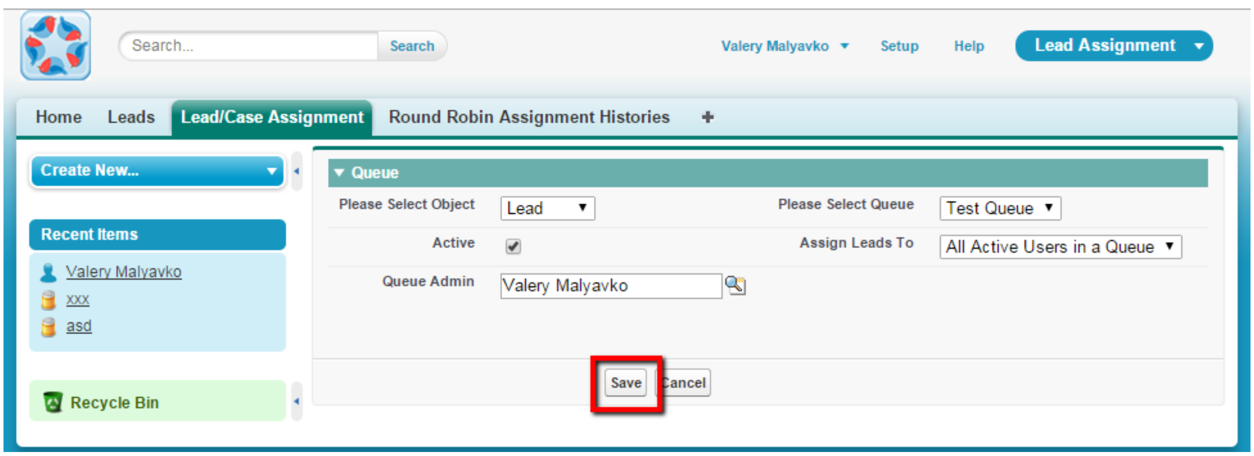
Step 4: Click on the button, “New”, to configure the new queue. Click on the “Edit” link to manage existing the Queue configuration.



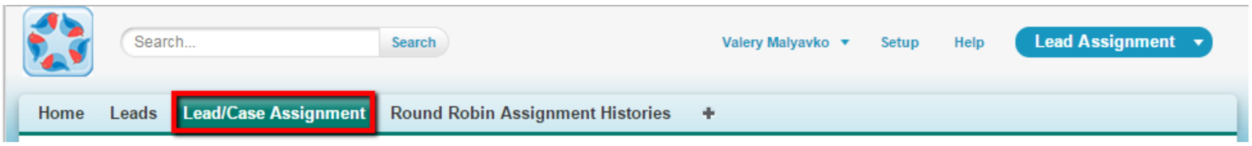
Step 5: Select users in a Queue to participate in the round robin assignment. To enable round robin assignment for this queue, verify that the 'Active' checkbox is checked. Select a Queue Admin user to receive any assignment failure emails related to this queue.



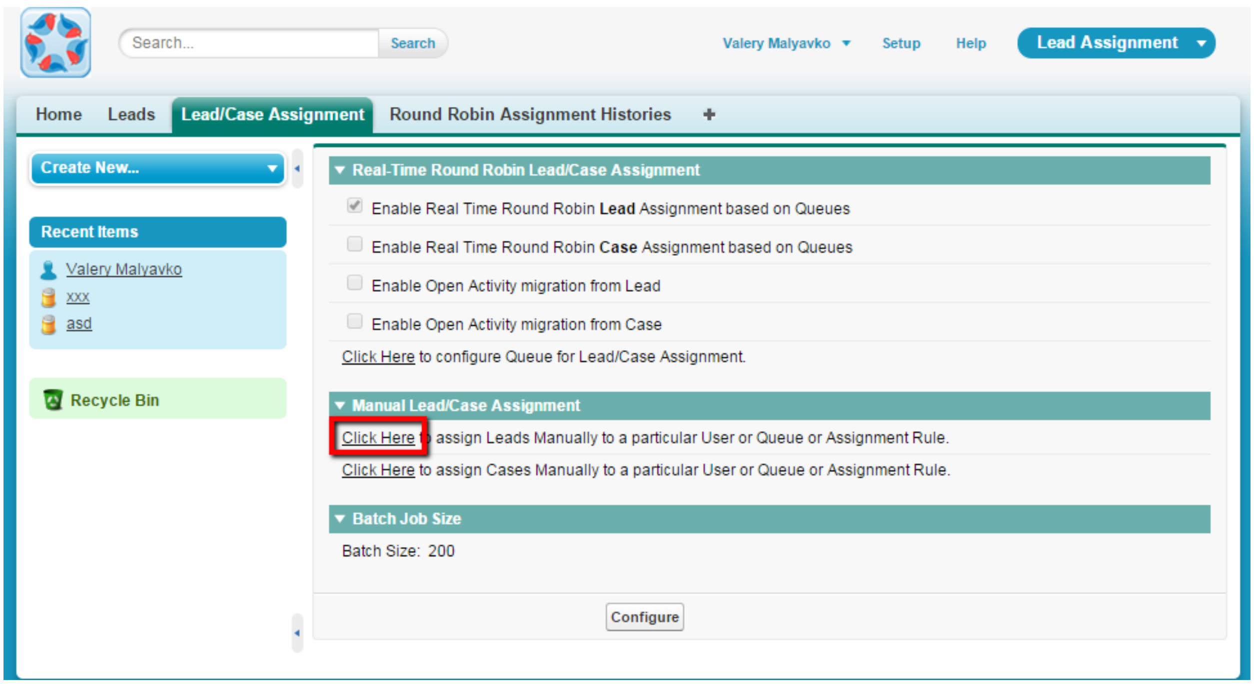
Click the "Save" button.



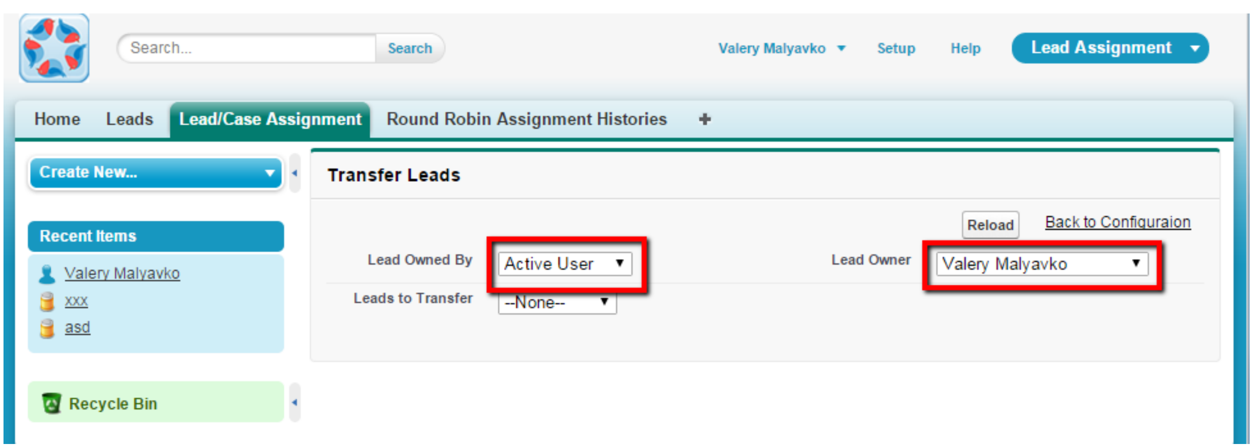
Step 6: Select the **Lead/Case Assignment** app tab in the top right corner of the homepage.



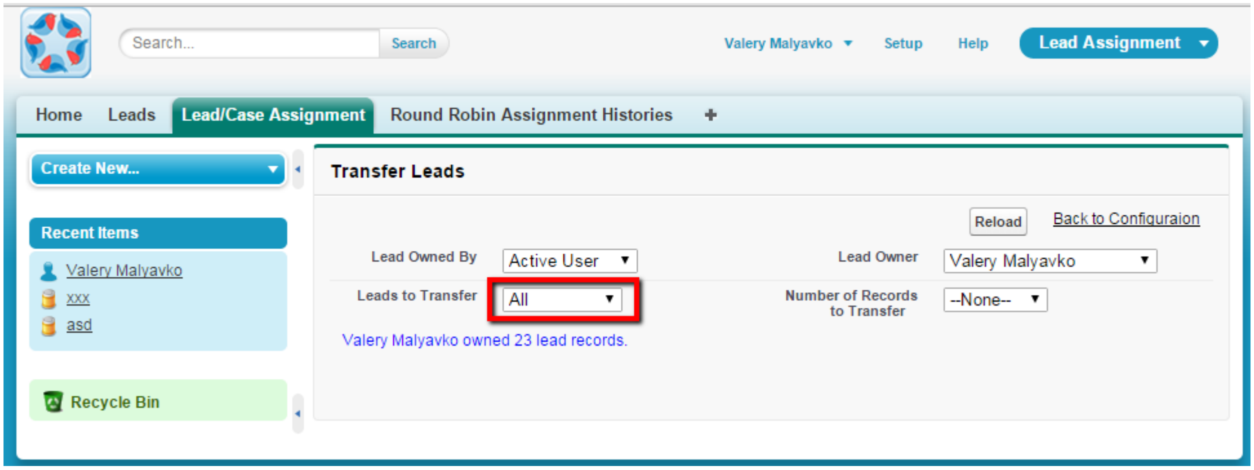
To transfer the Leads or Cases manually, click on the button, "Click Here to configure Queue for Lead/Case Assignment".



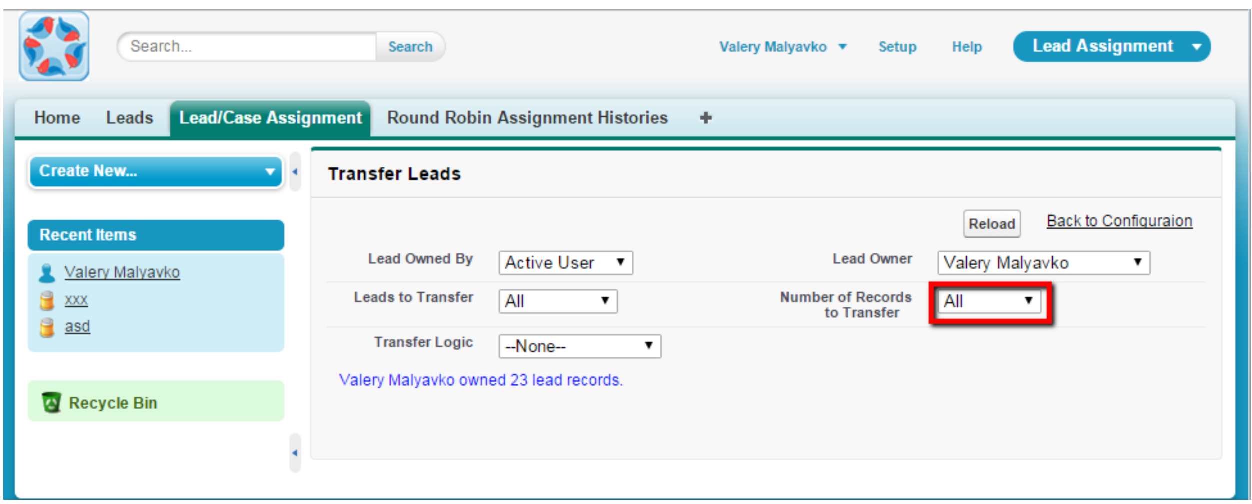
Step 7: To transfer Leads or Cases from a particular user/queue, select the appropriate values in the "Lead Owned By", "Case Owned By", "Lead Owner" and "Case Owner" picklists.



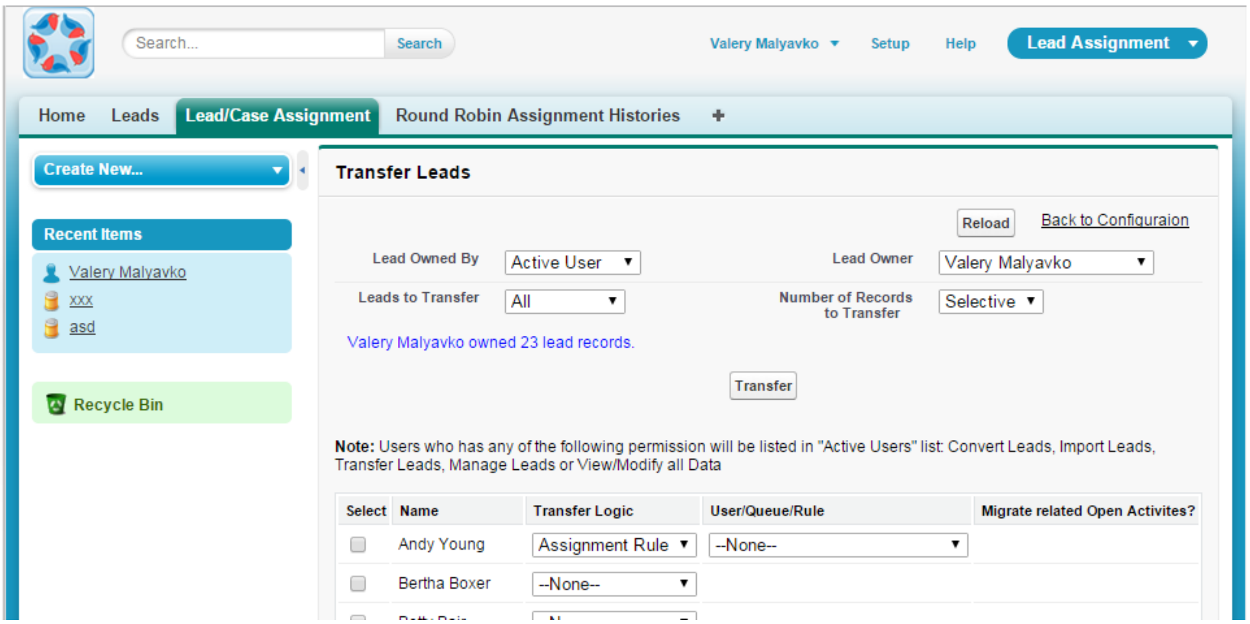
Step 8: To transfer all Leads or Cases that are owned by a selected user/queue, select “All” in the picklist, “Leads to Transfer” or “Cases to Transfer”. To transfer Leads or Cases based on filter condition (e.g. **Lead Email** <u>is not equal</u> to *Blank*), click “Selected Leads” or “Selected Cases”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



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



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.



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).