

Record Assigner Admin Guide

Installation & Setup	1
Install the Record Assigner package from the AppExchange	1
Create Record Assignment Configuration records	1
Create a Process Builder to act as the trigger for record assignment	3
Usage Considerations	6
Permissions	6
Purchasing the App	7
Non-Profits	7

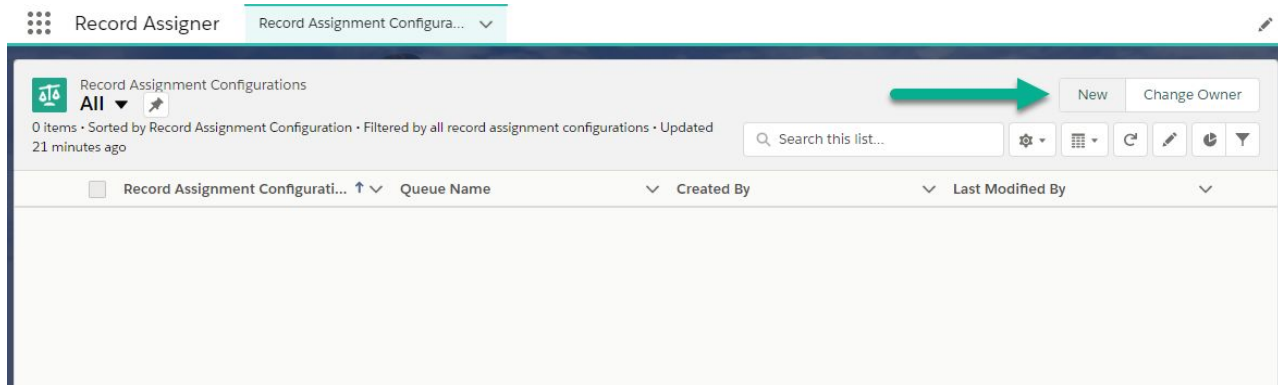
Installation & Setup

1. Install the Record Assigner package from the AppExchange

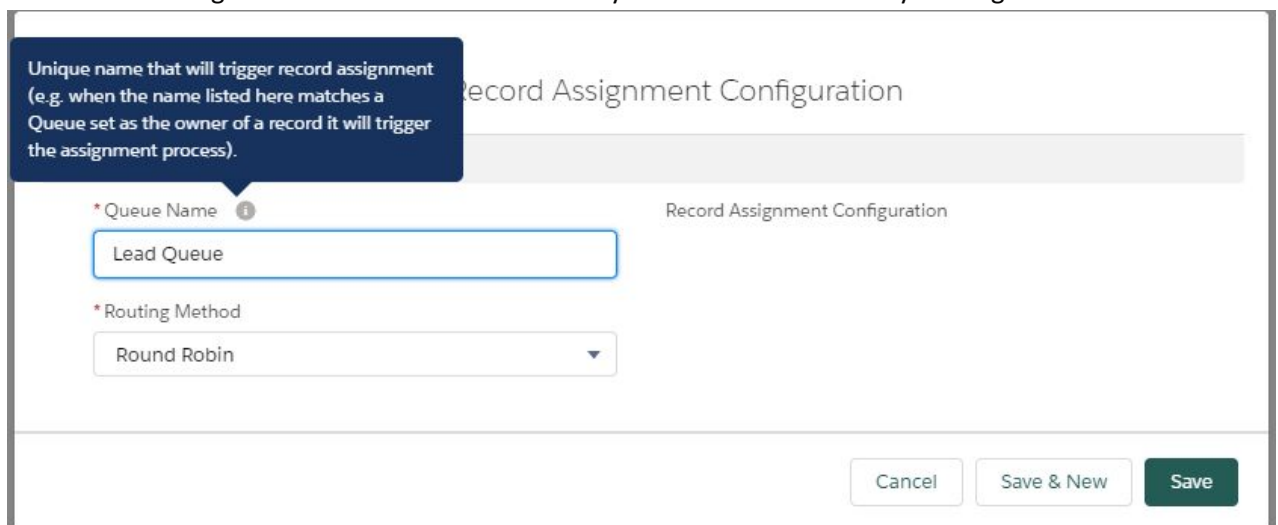
- Navigate to:
<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FnDyVUAV>
- Click Get It Now and Install. Leave default selection to Install for Admin Users.

2. Create Record Assignment Configuration records

- Navigate to the included Record Assigner application in App Launcher. To provide access to non-Admin users, assign the included Record Assigner Permission Set to any individuals that need to manage configuration of Users that are assigned to records through automated routing. This typically includes Sales/Service Managers that need to activate/deactivate team members from routing and control their assignment thresholds.
- Create a Record Assignment Configuration record.



Enter a name for the routing queue. If the object you will be routing records on supports native Queue assignment, like Leads, put the Name (not DeveloperName) of a matching Queue in this field. This is where the Routing Method is also chosen. Currently Round Robin is the only routing method included.



- Add a Record Assignment Member record for each User that will need to be routed records. With each record there can be thresholds set for number of records assigned.

Record Assigner Record Assignment Configura...

Record Assignment Configuration RAC-0000

New Contact Edit New Opportunity

Record Assignment Members

0 items • Sorted by Last Assignment • Updated a few seconds ago

New

Queue Name Lead Queue

Routing Method Round Robin

Created By 10/18/2019 9:21 AM

Last Modified By 10/18/2019 9:21 AM

Record Assignment Configuration RAC-0000

New Record Assignment Member

Information

User Integration User

Record Assignment Member

Active ☒

Control when users are active for assignment

Routing Limits

Limit

Limit Frequency

Metrics

Records Assigned

Last Assignment

Cancel Save & New Save

--None--

Daily

Weekly

Monthly

Quarterly

Annual

Optionally set limit of records assigned per given period

Record Assignment Configuration RAC-0000

Record Assignment Members

3 items • Sorted by Last Assignment • Updated a few seconds ago

Deactivate members as needed

	Record Assi...	User	Active	Limit	Limit Frequ...
1	RAM-0000	Integration User	☒	0	10
2	RAM-0001		☒	0	Daily
3	RAM-0002		☒	0	50
					Weekly

View All

- d. Repeat these steps to create routing queues for any business groups or object types. These records can be adjusted at any time to configure the routing.

3. Create a Process Builder to act as the trigger for record assignment

- a. Create a Process Builder. This is a one time process in the setup for routing to occur. The common use case is to create process when record changes on a desired object type. In advanced cases you might choose to trigger off a platform event or another process.

New Process

Process Name *

Lead Process

API Name * i

Lead_Process

Description

Process to fire on Lead records

The process starts when *

A record changes ▼

Cancel

Save

Choose Object and Specify When to Start the Process

Object * i

Lead

Start the process *

☐ only when a record is created
 ☒ when a record is created or edited

▼ Advanced

Recursion - Allow process to evaluate a record multiple times in a single save operation? i
☐ Yes

- b. Next, create a condition or formula to determine when automated record assignment should take place. If the selected object supports Queues, it is recommended to use the following generic formula:

OR(AND(ISNEW(), BEGINS([Lead].OwnerId, "00G")), AND(ISCHANGED([Lead].OwnerId), BEGINS([Lead].OwnerId, "00G"))))

This formula will allow the Record Assigner application to automatically route records assigned to a queue that matches a Record Assignment Configuration with active Record Assignment Members. The purpose for using this generic formula is to support standard assignment rules that can be used to route to the appropriate queue type and implement desired business rules into routing criteria.

Define Criteria for this Action Group

Criteria Name * 

Owner Assigned Queue

Criteria for Executing Actions *

☐ Conditions are met

☒ Formula evaluates to true

☐ No criteria—just execute the actions!

Build Formula

OR(AND(ISNEW(), BEGINS([Lead].OwnerId, "00G")), AND(ISCHANGED([Lead].OwnerId), BEGINS([Lead].OwnerId, "00G")))

✓ Advanced

Do you want to execute the actions only when specified changes are made to the record? 

☒ Yes

Below is another example for objects that do not support Queue owners or standard assignment rules. Simply create a condition or formula using any fields for criteria that should trigger Owner routing assignment.

Define Criteria for this Action Group

Criteria Name * ⓘ

Banking Queue Assign

Criteria for Executing Actions *

☐ Conditions are met
☒ Formula evaluates to true
☐ No criteria—just execute the actions!

Build Formula

```
AND(ISCHANGED([Account].Industry), ISPICKVAL([Account].Industry, "Banking"))
```

> Advanced

- c. Invoke the included Record Assigner Apex action to handle record routing and assignment based on matching Record Assignment Configuration with active Record Assignment Members. This action requires the record ID and optional Queue Name for objects that do not support queues.

Call Apex



Action Name * ⓘ

Lead Assign

Apex Class * ⓘ

Assign Records Round Robin

Set Apex Variables

Field *	Type *	Value *
Record Id	Field Reference ▼	[Lead].Id 🔍

For objects that do not support queues, pass a value for Queue Name that directly matches the Queue Name field on an existing Record Assignment Configuration record.

Call Apex ?

Action Name * i

Banking Queue Assign

Apex Class * i

Assign Records Round Robin

Set Apex Variables

Field *	Type *	Value *
Record Id	Field Reference ▼	[Account].Id Q
Queue Name	String ▼	Account Banking Queue

- d. Activate the process and setup is complete!

Usage Considerations

Permissions

All Users that trigger routing assignment must have access to the **RecordAssign.RoundRobinAssignInvocable** Apex class via their Profile or assigned Permission Set. If a user causes record assignment to be invoked and does not have access to this Apex class, routing will fail and the Administrator who setup the calling Process or Flow will get an error email.

Record Assigner will automatically route and change ownership of records based on its configuration and trigger criteria set. Ownership assignment will occur regardless of running user permissions that created the record or updated it to meet criteria for ownership routing and change.

The Record Assigner App available via App Launcher and its associated configuration objects (Record Assignment Configuration and Record Assignment Member) are accessible to non-admin users via the included Record Assigner Permission Set. The Permission Set will give full CRUD access to the Record Assigner setup objects.

Purchasing the App

To purchase the app you will need to login to the AppExchange and install the package in your production org. Once installed in production, you can re-visit the AppExchange listing and you will be presented with a Buy Now option to initiate the AppExchange Checkout process.

Permissions Required: Checkout Enabled (User checkbox) and Manage Billing (System permission).

Non-Profits

You may need to open a ticket with Salesforce support to enable AppExchange Checkout permissions. You must be able to see the Manage Billing system permission on the Profile for your user and see the Checkout Enabled checkbox on your User record.