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USER MANUAL

Contents

SET UP YOUR RRD

Welcome, Salesforce Administrators & Users

This guide contains the details you need to setup & maintain Round Robin Distributor (RRD) in your Salesforce Organization. We hope this guide provides you the complete content you need to get RRD up and running with salesforce. If you need any further assistance feel free to contact the support team at Mirketa.

RRD and its features

RRD assigns leads/cases to logged on or all agents based on a configurable business logic that can be defined by you. It easily distributes inbound leads & cases from chat, web and phone. The ease of configuring & using makes RRD a very user-friendly app. Also, the Intelligent Alerts and Dashboards makes it very easy for tracking and reporting purposes.

Automating your lead and case assignment has never been so simple and effective. RRD can eliminate your lead and case distribution problem by automating the assignments. Just configure the assignment criteria and let RRD take care of your lead and assignment problems. It's like Plug and Play.

The RRD feature list includes:

- Lead, case routing
- Round robin
- Load balancing
- Capping team/user wise
- Weighed assignment
- State, zip code, skill routing
- Assignment to online/offline users
- Reassign from Queue
- Reassign from Detail
- Assignment applicable to any lead source.
- Assignment applicable to any case origin
- Integrates with your existing Salesforce queues/assignment rules
- Integrate with different marketing automation software
- Custom/Standard Reports for higher visibility and productivity.
- Configurable Alerts and smart Dashboards
- Notification option via task, email or both
- Easy to Install, Customize & Intuitive UI

For Salesforce Administrators

1. Installing RRD

Admins can **install** RRD package from the AppExchange in their salesforce organization.

1) While installing, the first screen asks you to choose from:
    a. Install for admins only
    b. Install for all users
    c. Install for specific profiles
2) **Choose** the option as per your need of the Application.
3) Click **install**
4) Wait for the application to get installed and then click **done.**

2. Uninstalling RRD

To access the package detail page: from Setup, enter Installed Packages in the Quick Find box, select Installed Packages, and then click the name of the package that you want to view. Click Uninstall to remove the package and all its components from your Salesforce organization.

3. Configuring your RRD

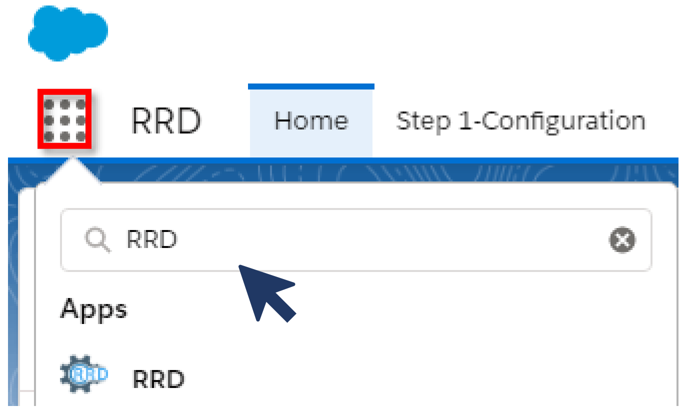
Configuring the Round Robin Lead/Case distribution in your Salesforce system using RRD takes only a few minutes.

The following modules will help you understand Configuring RRD and how it works:

1) How to access and open the RRD app in your Salesforce Org

1.1) **Using Salesforce Classic?** Click on Force.com Menu from top right and select RRD.

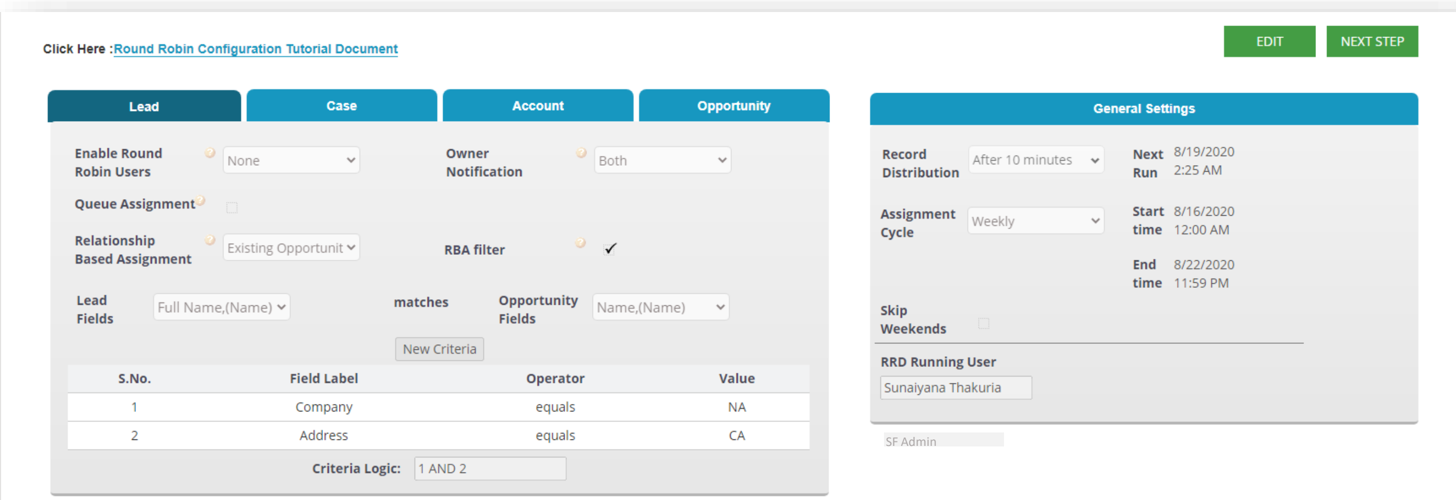
1.2) **Using Salesforce Lightning?** Click on AppLauncher on the left side of the Navigation bar, search for RRD and click on the app



2) Step 1 – Configuration Tab

Configuration Tab is a one-time settings page through which you can configure how RRD will work.

1) Click on Step 1-Configuration tab
2) First time you will see Landing page, you can check ‘Do not show this message again’ if you don’t want to see landing page again. Click on Configure button, you will see the screen as shown below
3) Click on edit button to update any setting to see the edit page as shown in pic mention in “Lead Assignment configuration section”.



On Edit page, you can set these settings:

a. Lead Assignment Configuration (Shown Above pic): In this setting, you can define the method of assignment for new lead.

i. Check **Enable Round Robin for online users** Or **Enable Round robin for all users.** Note: You can check only one method.

- Enable Round Robin Users when set to "**All**" works for logged in and logged out users in your Salesforce org
- Enable Round Robin Users when set to "**Online**" would work for only the logged in users (note*: modify session security settings for an efficient usage)

ii. Relationship based Assignment: If any of the relationship is selected from the dropdown list, RRD will override its main algorithm. The options available include Lead fields, Existing Accounts and Existing Opportunities.
It will then directly assign records based on the relationship field value of the incoming record to the CRM user who was last assigned such a record having similar field value.

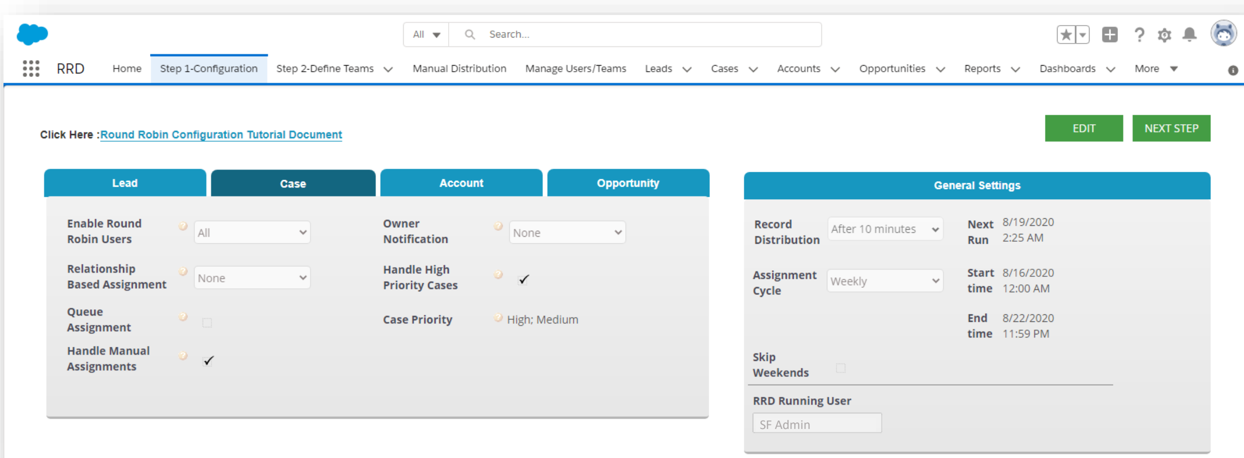
- Lead Fields- Maps lead owner of existing lead with a matching criterion to the new lead entered
- Existing Accounts- Maps Account owner of an existing account from a similar company the agent was working on when a lead is entered
- Existing Opportunity- Maps Opportunity owner of an existing opportunity based on the relationship field values entered to the new lead entered

iii. RBA Filters (Relationship based Assignment Filters): Exclusion setting from RBA of a lead record to eliminate it from getting assigned through relationship based assignment and work based on Round Robin or None as specified.

iv. Enable Queue Assignment all the Leads assign to Round Robin QUEUE.

v. Owner Notification: Check **Notify Lead owner via Email** to send notification via email, **Check Notify Lead owner via task** to Create task for Lead owner or you can check both to send notification via an email as well as via task.

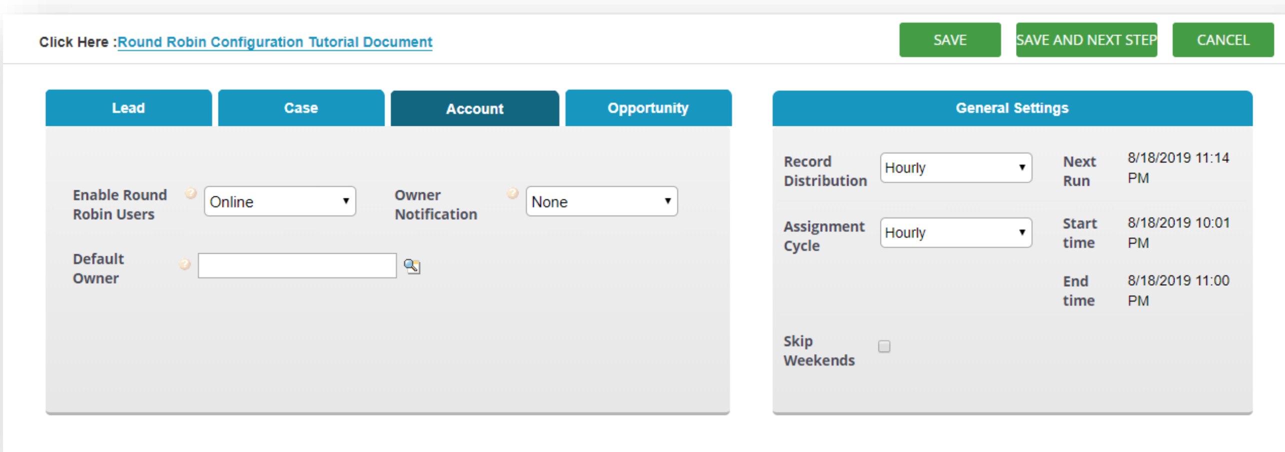
b. Case Assignment Configuration: In this setting, you can define the method of assignment for new Case.



i. Check **Enable Round Robin for online users** Or **Enable Round robin for all users. Note: You can check only one method**

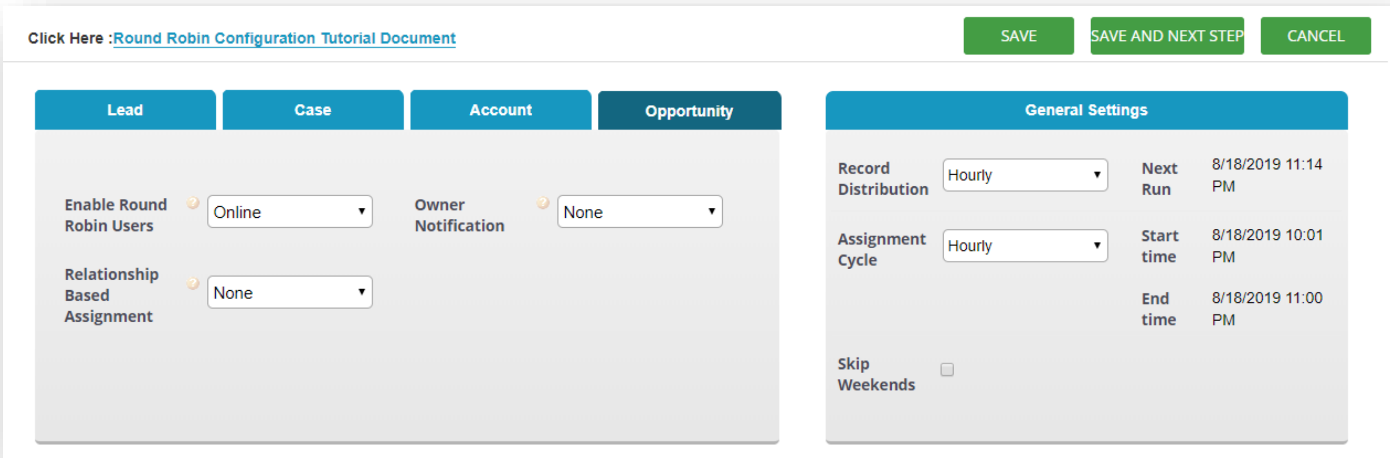
ii. Relationship based Assignment: If any of the relationship is selected from the dropdown list, RRD will override its main algorithm. It will then directly assign records based on the relationship field value of the incoming record to the CRM user who was last assigned such a record having similar field value.
iii. Enable "Queue Assignment" all the Case assign to Round Robin QUEUE**.**
iv. Enable "Handle High Priority Cases" so that all the high priority cases assign through RRD to their respective teams irrespective of its remaining limit of accept case in current cycle.
v. Case Priority: Set RRD to handle your cases based on the case priority. Enable this checkbox and the cases to be assigned based on team criteria, irrespective of the RRD Team/User maximum intake limit in a current assignment cycle.
vi. Handle Manual Assignments: Enable this checkbox, RRD will take into account the count of cases that were re-assigned manually from one RRD user to another. RRD will decrease the assigned cases count from previous RRD User and increase the count of the current RRD User.
vii. Owner Notification: Check **Notify Lead owner via Email** to send notification via email, **Check Notify Lead owner via task** to Create task for Lead owner or you can check both to send notification via an email as well as via task.

c. Accounts Assignment Configuration (Pic Mention Below): In this setting, you can define the method of assignment for new Account.
i. Check **Enable Round Robin for online users** Or **Enable Round robin for all users**
ii. Owner Notification: Check **Notify Lead owner via Email** to send notification via email, **Check Notify Lead owner via task** to Create task for Lead owner or you can check both to send notification via an email as well as via task.
iii. Default Owner: When Account Matches the team criteria and team and its users remaining limit is Zero then Account assign to the Default Owner



iv. Relationship Based Assignment: If any of the relationship is selected from the dropdown list, RRD will override its main algorithm. It will then directly assign records based on the relationship field value of the incoming record to the CRM user who was last assigned such a record having similar field value.

d. Opportunity Assignment Configuration: In this setting, this document defines the configuration of Opportunity Assignment.

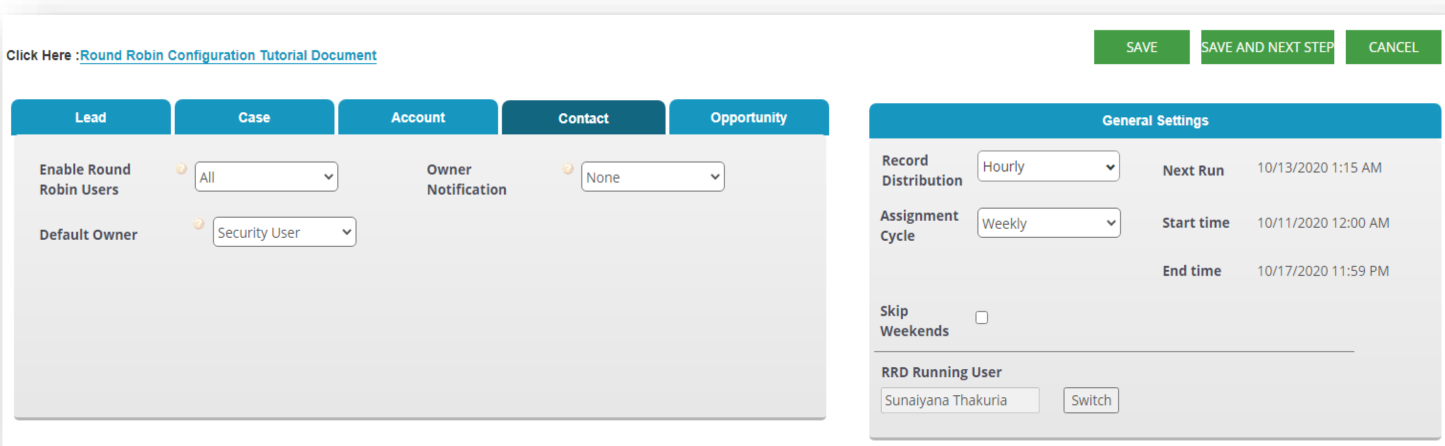


i. Check **Enable Round Robin for online users** Or **Enable Round robin for all users**

ii. Owner Notification: Check **Notify Lead owner via Email** to send notification via email, **Check Notify Lead owner via task** to Create task for Opportunity owner or you can check both to send notification via an email as well as via task.

iii. Relationship based Assignment: If any of the relationship is selected from the dropdown list, RRD will override its main algorithm. It will then directly assign records based on the relationship field value of the incoming record to the CRM user who was last assigned such a record having similar field value.

e. Contact Assignment Configuration: This setting helps you define the method for configuration for Contact Assignment



i. Check **Enable Round Robin for online users** Or **Enable Round robin for all users**

ii. Owner Notification: Check **Notify Contact owner via Email** to send notification via email, **Check Notify Contact owner via task** to Create task for Contact owner or you can check both to send notification via an email as well as via task.

iii. Default Owner: When Contact Matches the team criteria and team and its users remaining limit is Zero then Contact assign to the Default Owner

f. Assignment Cycle: In this setting you can define the Assignment cycle like Daily basis, weekly basis or Monthly basis, for example- You want to set the target of a team or User for weekly basis, round robin will automatically reset the number of intakes (Maximum intake limit in current cycle) for next week/day/month and keep the track of previous week/day/month assignment for that team or user. For your ease, it shows the Start time and end time based on your dropdown selection

g. Distribution Cycle: In this setting, you can define RRD Queue Distribution Cycle on Hourly or Daily Basis by RRD Algorithm. For your Ease, it shows Start Time.

h. Switch Running User: In this setting, Admin can switch the running user to oneself in cases where the previous user has become inactive. Note that, To run the scheduled jobs for distribution, they have to submitted in the name of an active CRM user.

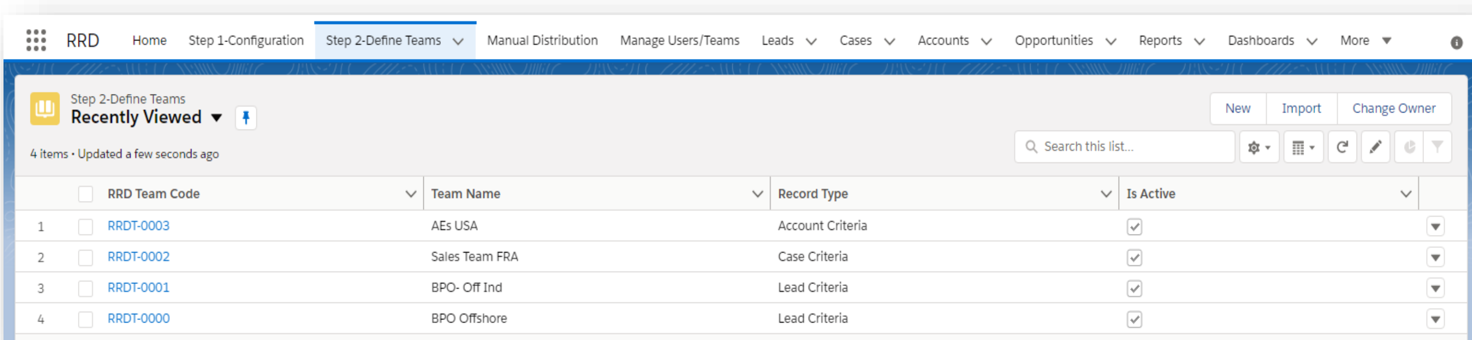
i. Save Button: To apply your settings, click on save.

j. Save and Next button: To apply settings and move to next step, click on Save and Next button. It takes you to Define Teams on click

k. Cancel Button: To revert the changes click on Cancel button.

3) Step 2 – Define Teams

After STEP-1 configuration, you need to define teams for case or lead distributions. You can click **next** from configuration page or click **on Step2-Define Team** tab as shown in image below.

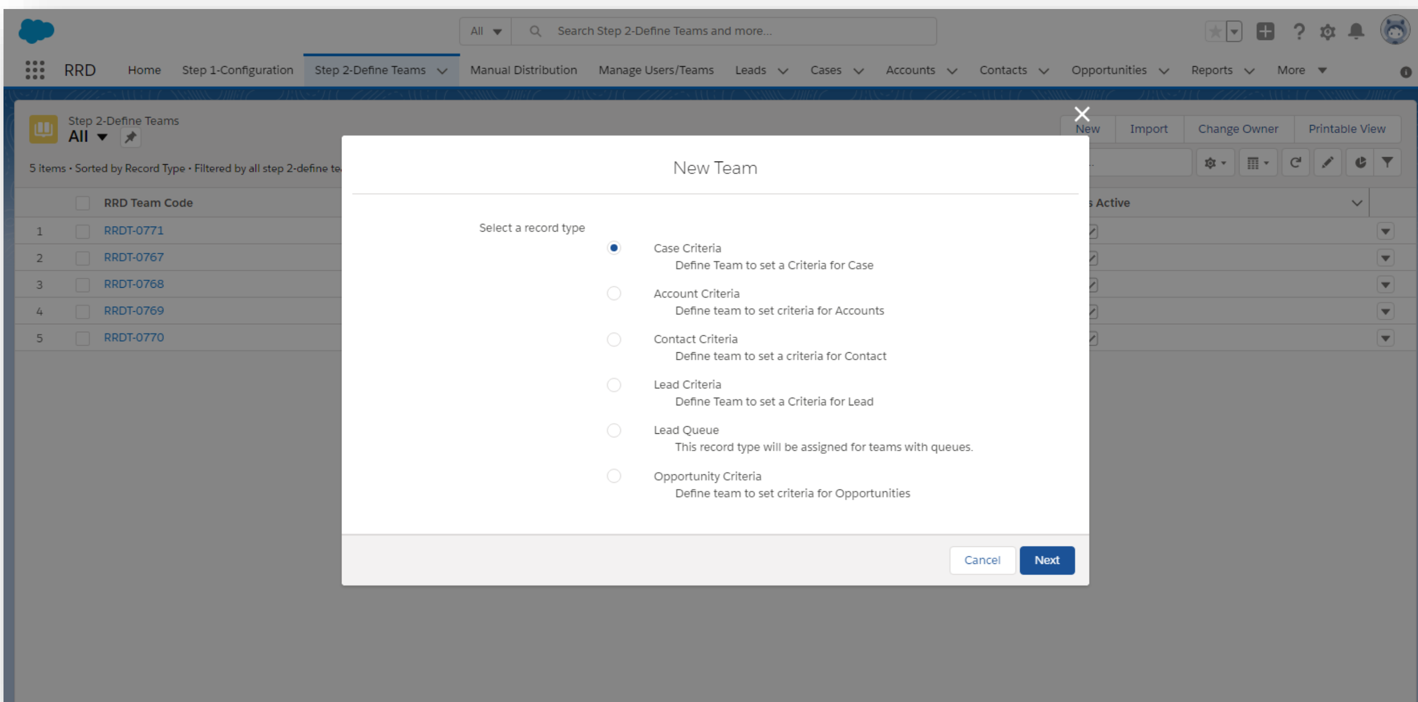


You can edit/Delete existing team, Criteria or remove/add Round Robin Users in that Team.

For **defining a new team**, you need to follow these steps:

1) Determine Object on which you want to define team
   a. Lead Criteria
   b. Case Criteria
   c. Opportunity Criteria
   d. Account Criteria
   e. Contact Criteria
   f. Lead Queue
2) Defining Criteria to create team
   a. Assigning CRM Users to the team
   b. For Lead Queue Object, you need to assign Salesforce Queues.
   c. Add Criteria Fields to filter Records for team.
   d. Add Formula field in Field criteria to filter Lead/Case

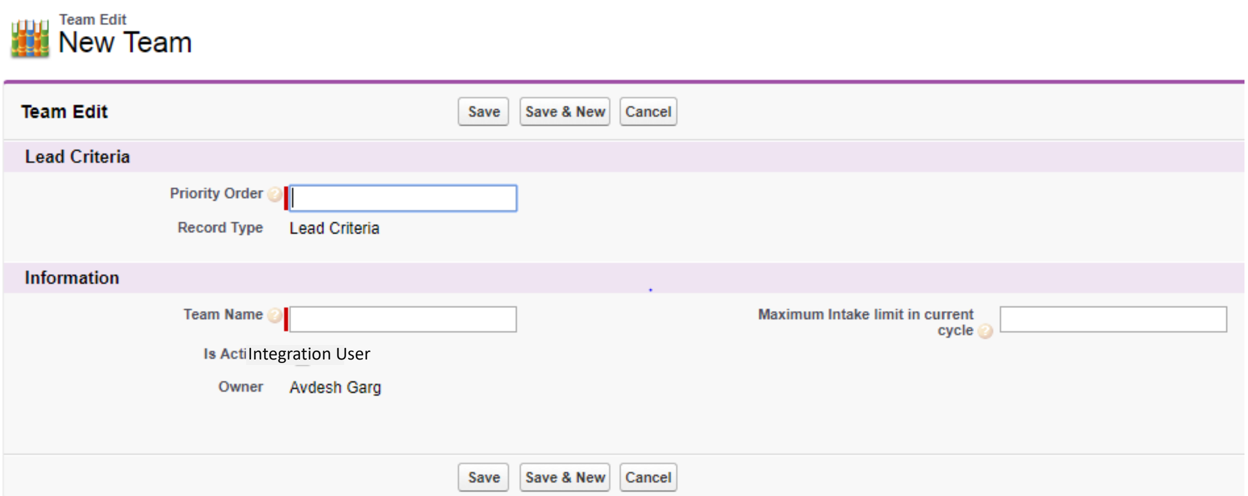
Determine Object on which you want to define team(Common for all types of Team): - Click on 'New Team' button you will be redirected to the page in which you will determine the object criteria, you can set Lead Criteria or Case criteria as shown in image below.



Field Name	Field Description
Record Type of New Team	It's a dropdown field where you select the record type for team

Button Name	Button Description
Continue	This button leads to "New Team" page.
Cancel	Terminate the team creation process

a) Defining criteria to create team:
   a. Criteria for Lead: You need to enter this information as show in image below.

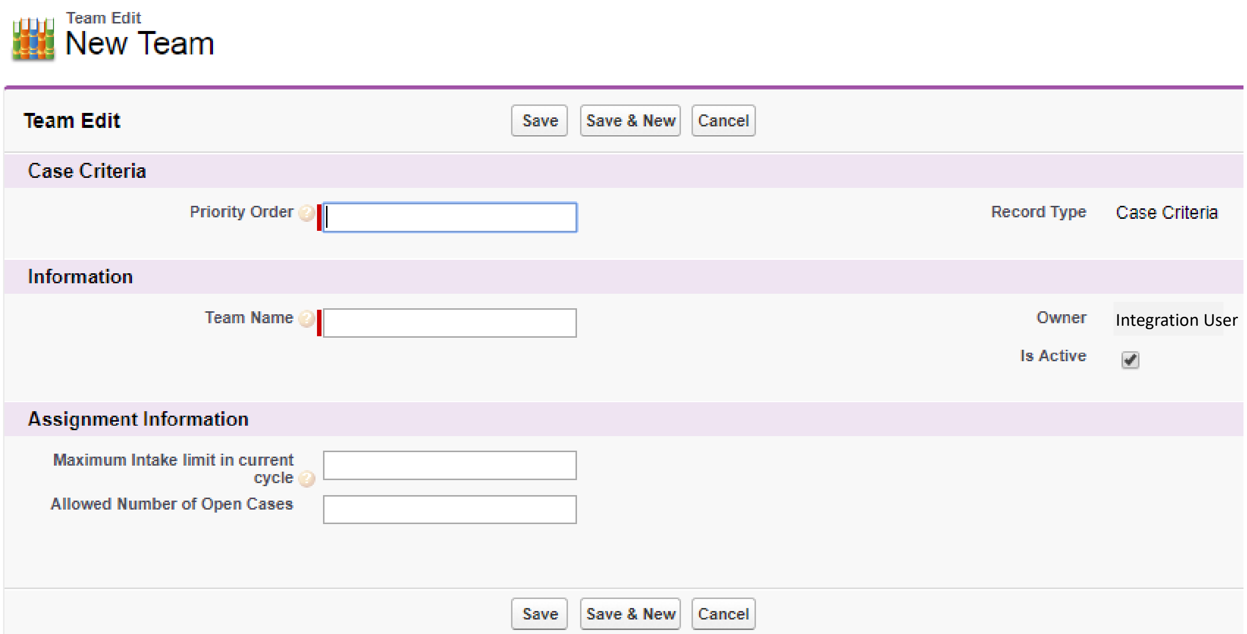


Field Name	Field Description
Priority Order	You need to fill the number in this field. It decides the priority of team at the time of record assigning when a record satisfies the criteria of more than one team. Lowest priority number team get more priority Priority order buckets are unique referring to different objects you want to set up RRD for
Record Type	It is Uneditable Field, which shows the type of team based on Record.
Team Name	You need to fill the unique name for that, this will help you identify the team in future
Owner	It's a Uneditable Field, which the shows who create the team
Is Active	It's an editable check box, If you unselect the check box then team will disable in system. If you want to use the team, make sure that check box is Enable
Maximum Intake Limit in Current Cycle	You need to fill the number in this field. This value defines the maximum number of records a team can be assigned which is set to unlimited when left blank

Button Name	Button Description

Save	Save the details, create the team in system and lead to team details page where you can add criteria and round robin users.
Save and New	Save the details, create the team in system and lead to the "Select Team Record Type" Page
Cancel	Terminate the team creation process

b. Criteria for Case: You need to enter this information as show in image below.

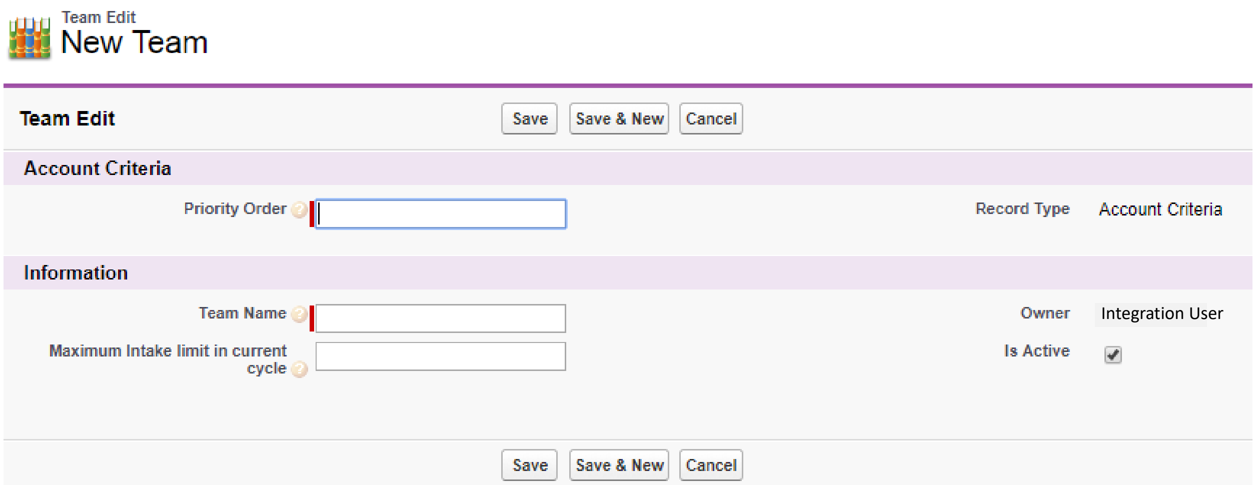


Field Name	**Field Description**
Priority Order	You need to fill the number in this field. It decides the priority of team at the time of record assigning when a record satisfies the criteria of more than one team. Lowest priority number team get more priority
Record Type	It is Uneditable Field, which shows the type of team based on Record.
Team Name	You need to fill the unique name for that, this will help you identify the team in future
Owner	It’s a Uneditable Field, which the shows who create the team
Is Active	It’s an editable check box, If you unselect the check box then team will disable in system. If you want to use the team, make sure that check box is Enable
Maximum Intake Limit in Current Cycle	You need to fill the number in this field. This value defines the maximum number of records a team can be assigned which is set to unlimited when left blank

Allowed Number of Open Cases	You need to fill number in this field. System will not allow number of open cases more than the number you mention in this to this team.

Button Name	**Button Description**
Save	Save the details, create the team in system and lead to team details page where you can add criteria and round robin users.
Save and New	Save the details, create the team in system and lead to the "Select Team Record Type" Page
Cancel	Terminate the team creation process

c. Criteria for Account:

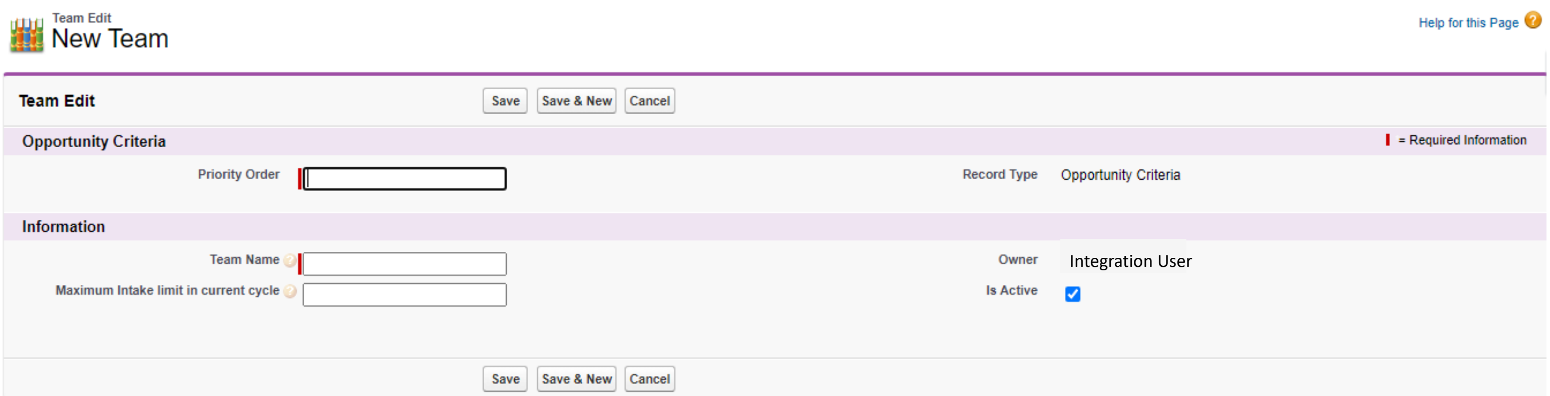


Field Name	**Field Description**
Priority Order	You need to fill the number in this field. It decides the priority of team at the time of record assigning when a record satisfies the criteria of more than one team. Lowest priority number team get more priority
Record Type	It is Uneditable Field, which shows the type of team based on Record.
Team Name	You need to fill the unique name for that, this will help you identify the team in future
Owner	It's a Uneditable Field, which the shows who create the team
Is Active	It's an editable check box, If you unselect the check box then team will disable in system. If you want to use the team, make sure that check box is Enable
Maximum Intake Limit in Current Cycle	You need to fill the number in this field. This value defines the maximum number of records a team can be assigned which is set to unlimited when left blank

Button Name	**Button Description**
Save	Save the details, create the team in system and lead to team details page where you can add criteria and round robin users.

Save and New	Save the details, create the team in system and lead to the "Select Team Record Type" Page
Cancel	Terminate the team creation process

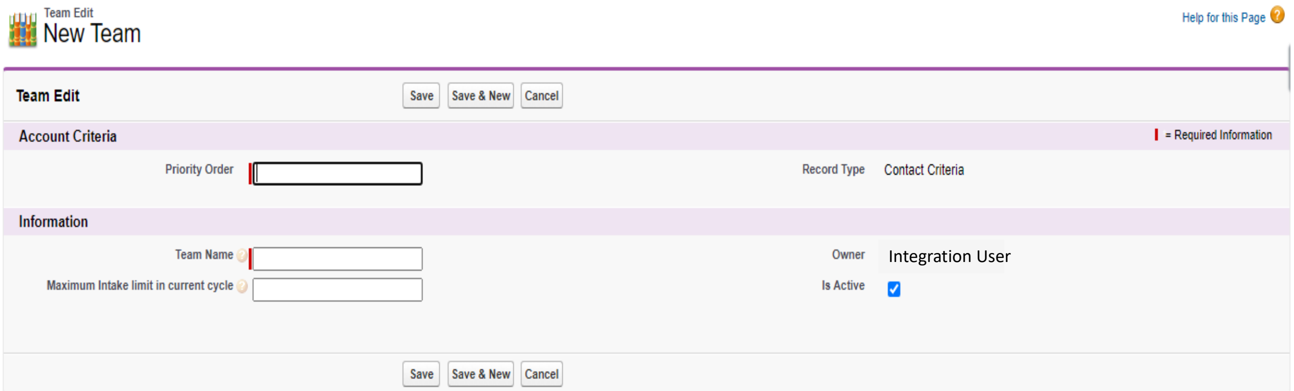
d. Criteria for Opportunity:



Field Name	Field Description
Priority Order	You need to fill the number in this field. It decides the priority of team at the time of record assigning when a record satisfies the criteria of more than one team. Lowest priority number team get more priority
Record Type	It is Uneditable Field, which shows the type of team based on Record.
Team Name	You need to fill the unique name for that, this will help you identify the team in future
Owner	It's a Uneditable Field, which the shows who create the team
Is Active	It's an editable check box, If you unselect the check box then team will disable in system. If you want to use the team, make sure that check box is Enable
Maximum Intake Limit in Current Cycle	You need to fill the number in this field. This value defines the maximum number of records a team can be assigned which is set to unlimited when left blank

Button Name	Button Description
Save	Save the details, create the team in system and lead to team details page where you can add criteria and round robin users.
Save and New	Save the details, create the team in system and lead to the "Select Team Record Type" Page
Cancel	Terminate the team creation process

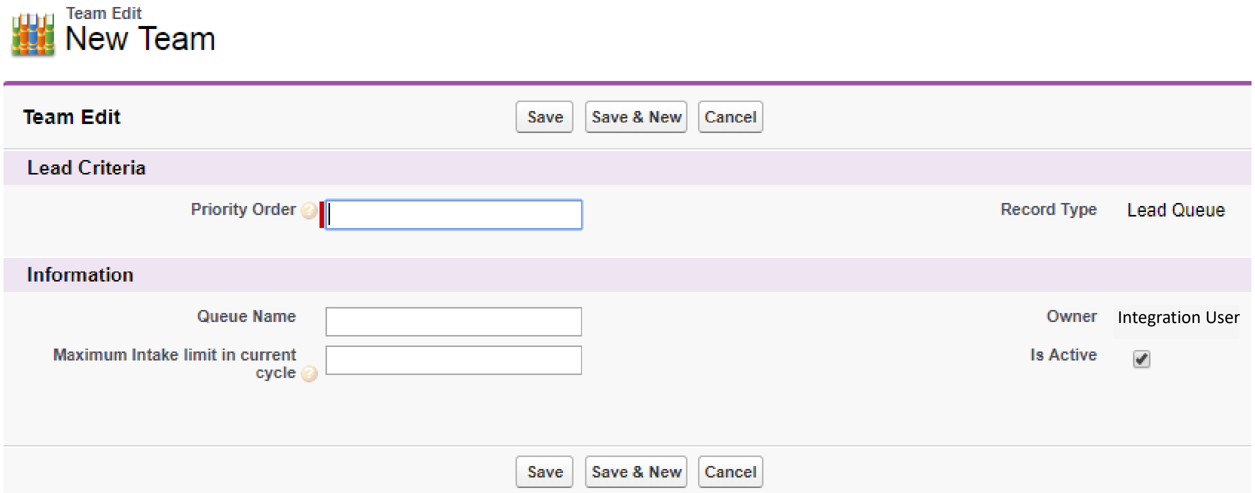
e. Criteria for Contact:



Field Name	Field Description
Priority Order	You need to fill the number in this field. It decides the priority of team at the time of record assigning when a record satisfies the criteria of more than one team. Lowest priority number team get more priority
Record Type	It is Uneditable Field, which shows the type of team based on Record.
Team Name	You need to fill the unique name for that, this will help you identify the team in future
Owner	It is an Uneditable Field, which the shows who create the team
Is Active	It’s an editable check box, if you unselect the check box then team will disable in system. If you want to use the team, make sure that check box is Enable
Maximum Intake Limit in Current Cycle	You need to fill the number in this field. This value defines the maximum number of records a team can be assigned which is set to unlimited when left blank

Button Name	Button Description
Save	Save the details, create the team in system and lead to team details page where you can add criteria and round robin users.
Save and New	Save the details, create the team in system and lead to the "Select Team Record Type" Page
Cancel	Terminate the team creation process

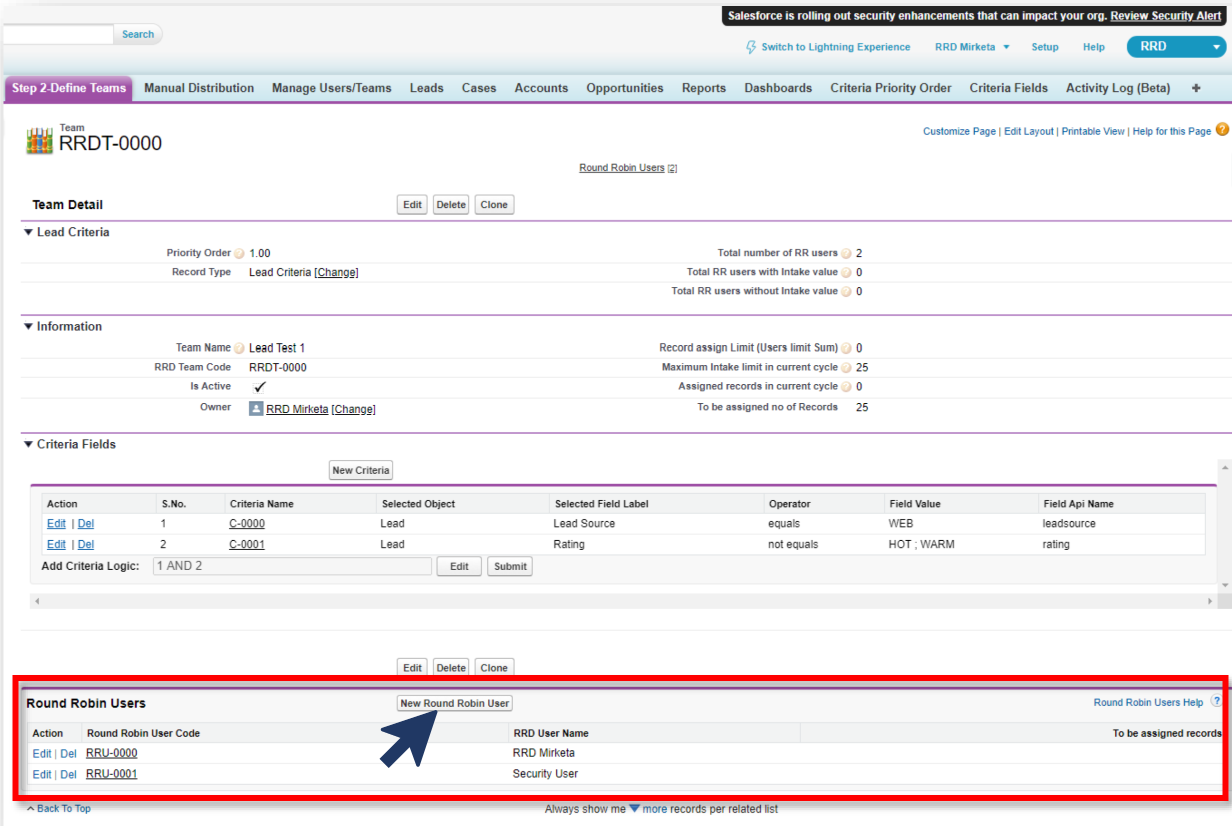
f. Criteria for Lead Queue: This record type will be assigned for teams with queues



Field Name	Field Description
Priority Order	You need to fill the number in this field. It decides the priority of team at the time of record assigning when a record satisfies the criteria of more than one team. Lowest priority number team get more priority
Record Type	It is Uneditable Field, which shows the type of team based on Record.
Team Name	You need to fill the unique name for that, this will help you identify the team in future
Owner	It's a Uneditable Field, which the shows who create the team
Is Active	It's an editable check box, If you unselect the check box then team will disable in system. If you want to use the team, make sure that check box is Enable
Maximum Intake Limit in Current Cycle	You need to fill the number in this field. This value defines the maximum number of records a team can be assigned which is set to unlimited when left blank

Button Name	Button Description
Save	Save the details, create the team in system and lead to team details page where you can add criteria and round robin users.
Save and New	Save the details, create the team in system and lead to the "Select Team Record Type" Page
Cancel	Terminate the team creation process

b) Assigning Round Robin User to the team:



a. Once you click on Save you will be seeing the Detail page of Team as shown in image below.

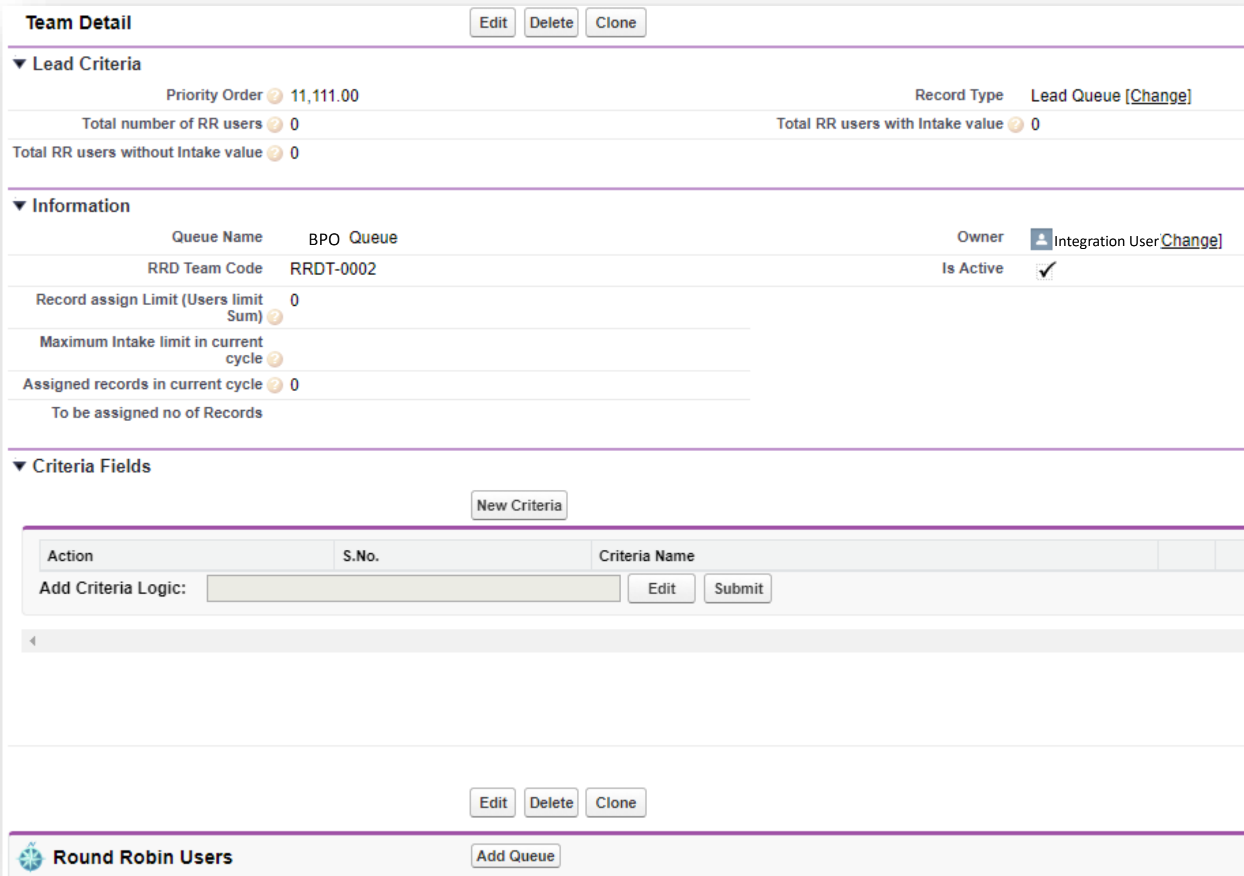
b. Scroll Down and click on **New Round Robin User** and Select the User as shown in image above.

- Leave Last Assigned Date time field Blank
- Make sure you check **Is Active** box if you want to include it in round robin.
- Click **Save**

c) Assign Salesforce Queue to Team of record type, "Lead Queue"

a. Once you click on Save you will be seeing the Detail page of Team as shown in image below.

b. Scroll Down and click on **New Queue** and Select the Queue as shown in image

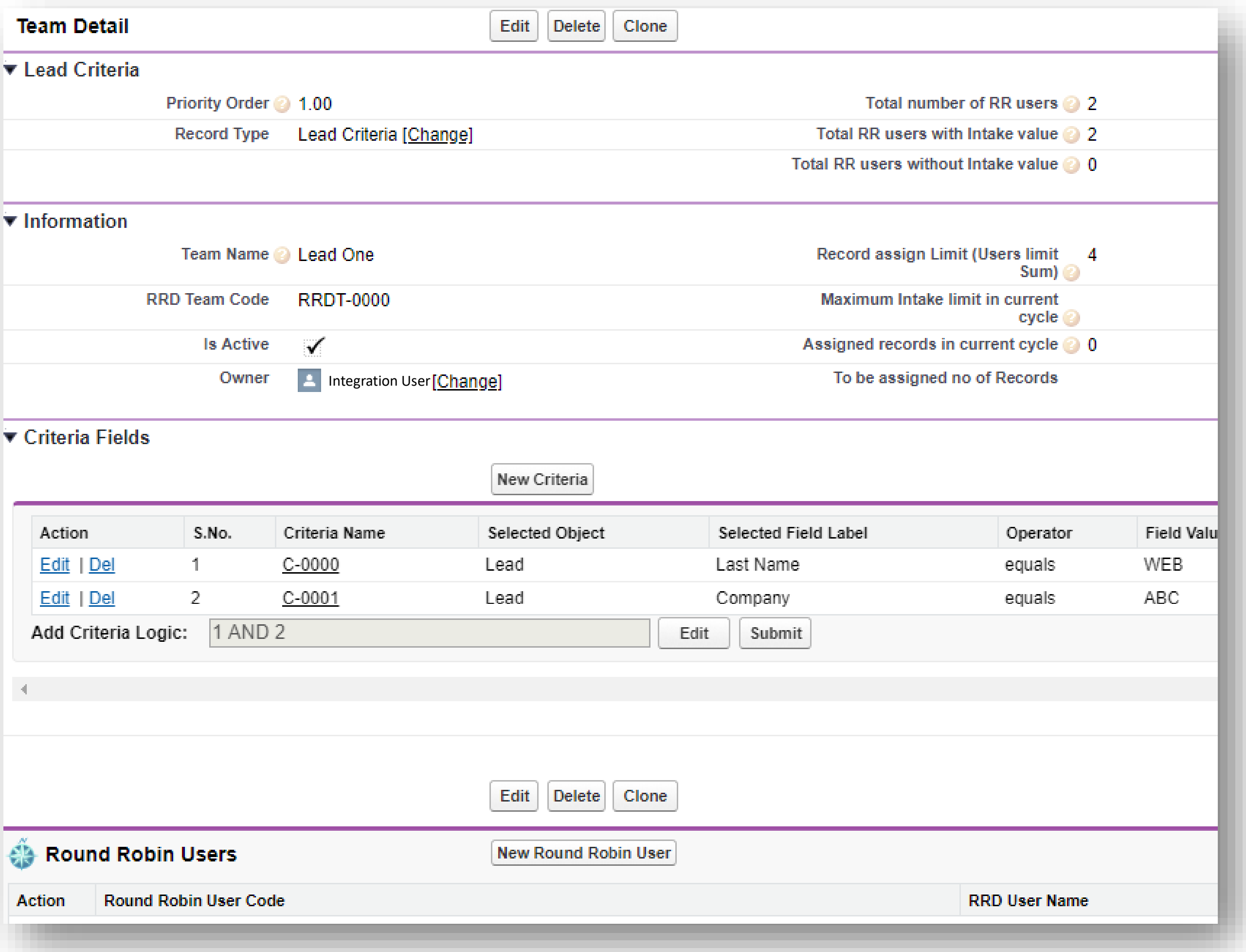


next to below image.

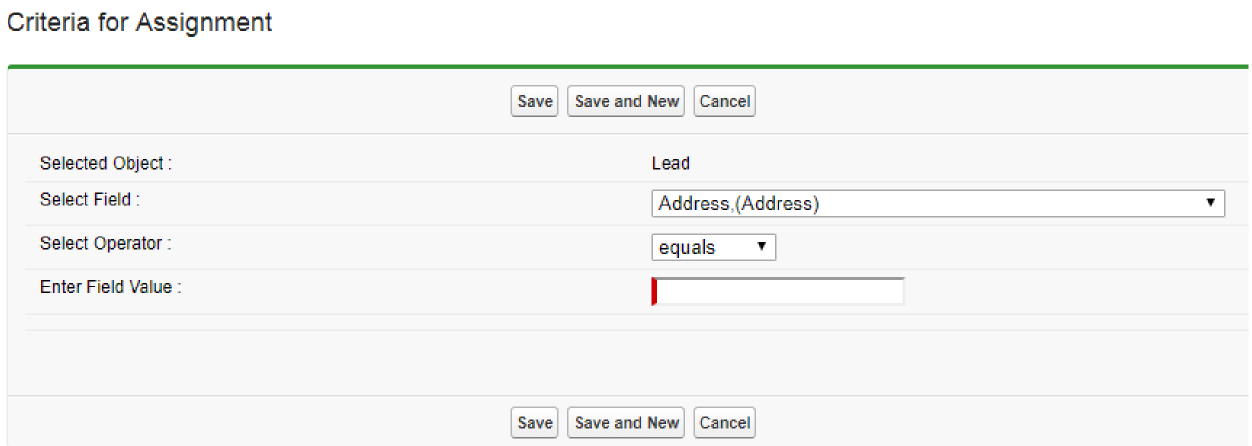
(Next PIC)

d) Add Field criteria to filter Records for Assignment:

   a. Once you click on Save you will be seeing the Detail page of Team as shown in image below.



   b. Scroll Down and click on **Add New Criteria Field** and Select any field from drop-down and Enter the value of the field as shown in image below.

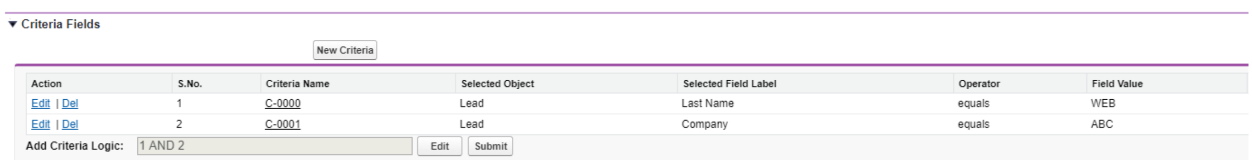


Button Name	Button Description
Save	Save the details, create the team in system and lead to team details page where you can add criteria and round robin users.
Save and New	Save the details, create the team in system and lead to the "Select Team Record Type" Page
Cancel	Terminate the team creation process

e) Add Formula field in Field criteria to filter Lead/Case

RRD allows you to utilize formula fields in field Criteria which you can build on Lead/Case, whenever you need to apply multiple logical conditions (AND/OR/NOT etc.) to filter lead/case you can simply create custom logical formula fields which returns a Boolean value (True or False) on certain business logic.

Example:- Creating a formula field, which return true if Last Name is Web and Company is ABC.



4)Review Criteria priority Order

Round robin Contains the feature to define Criteria priority during Team Creation. A record can match with two or more Team Criteria, Round robin Distributer assigns that record to the criteria whose order is on top (the lowest number).

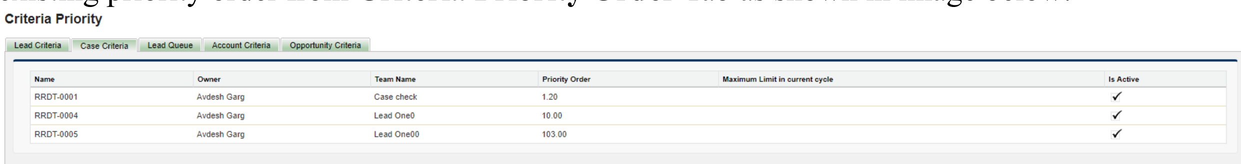
For example: There are two Team define on any object.

RRDT - 0001 has two criteria fields as shown below and its priority order is 1.2
Lead Source: Web
Zip code: 90005

RRDT - 0004 has two criteria fields as shown below and its priority order is 10

City: LA
Country: United States

Let's say a new case comes, which have the following information
Case Source: Web
Zip code: 90005
City: LA
Country: United States
Above case matches with both criteria, but case will be assigned to the **RRDT - 0001** which has lowest priority order i.e. 1.2
You can change the priority order by just open the Team record and you can review the existing priority order from **Criteria Priority Order** Tab as shown in image below: -


Criteria Priority

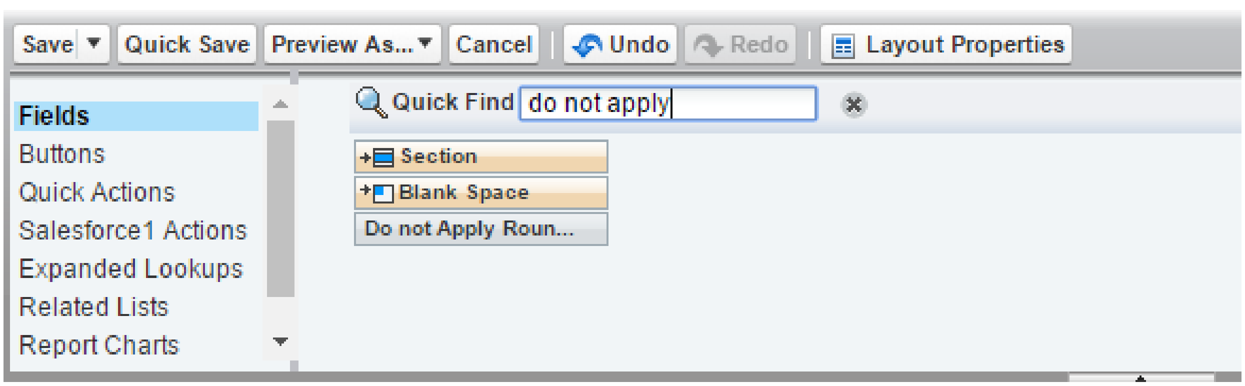
Lead Criteria | Case Criteria | Lead Queue | Account Criteria | Opportunity Criteria

Name	Owner	Team Name	Priority Order	Maximum Limit in current cycle	Is Active
RRDT-0001	Avdesh Garg	Case check	1.20		✓
RRDT-0004	Avdesh Garg	Lead One0	10.00		✓
RRDT-0005	Avdesh Garg	Lead One00	103.00		✓

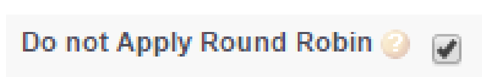
5)Do not apply Round Robin on a particular Lead/Case record

Round Robin Distributer app provides an ability to users to disable Round robin Distribution Algorithm for a particular Lead/Case Record during creation.

Admin Users need to add a field 'Do Not apply Round robin' field on Lead/Case page layout as shown in image below.



Users can check the **Do Not apply Round robin** box to bypass the round robin algorithm on Record creation as shown in image below.



6)Distribution from queue

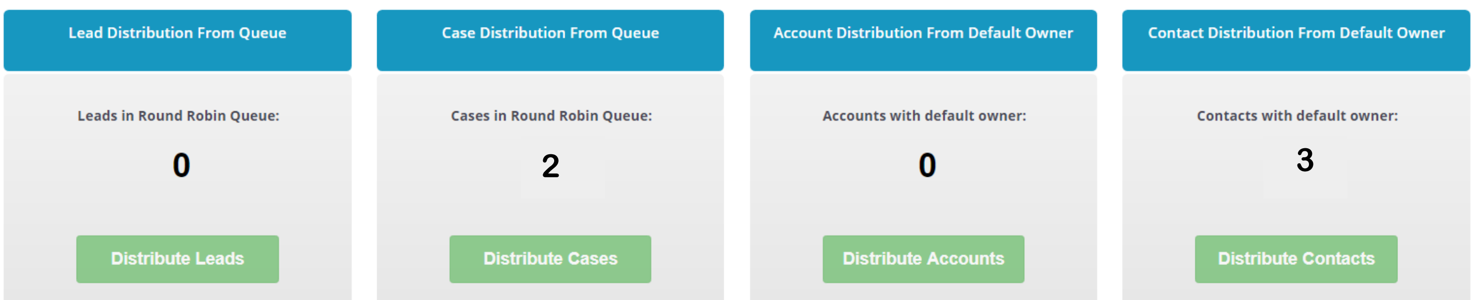
Round Robin Distributor (RRD) App assigns the newly created incoming leads/Cases to the appropriate users according to the criteria which you define in settings. It also provides you the feature of Load balancing and capping in online or offline users. However, there are certain scenarios in which round robin sends lead to the Round Robin Queue based on your configuration:

1. **No online user found Runtime**: If you have enabled Round robin distribution for online users and record has matches the certain team criteria of team, but at runtime there is no online user found of the respective team, in that case round robin sends lead/case to the Round Robin Queue.
2. **Current Cycle Target completed:** If you have defined the target for your teams or users and record has matches the certain team criteria of team. After completion of the target of Respective Team or Respective team users, Round robin sends lead/case to the Round Robin Queue.

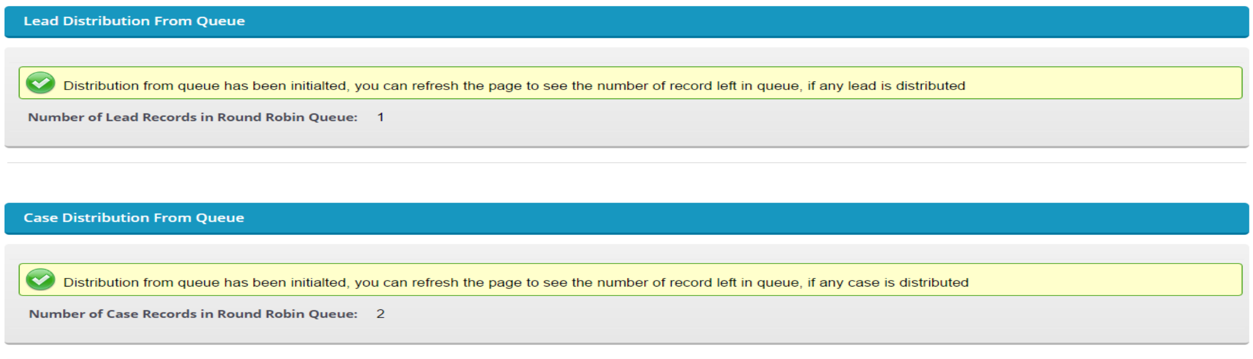
Round Robin provides you the feature of re-assigning leads/cases with the same logic using which you have configured RRD earlier. It will distribute leads to the appropriate users and give you the number of records distributed in message which has been distributed from queue.

How to use Distribution form queue feature:

1. Click on Distribution form queue tab as shown in image below.

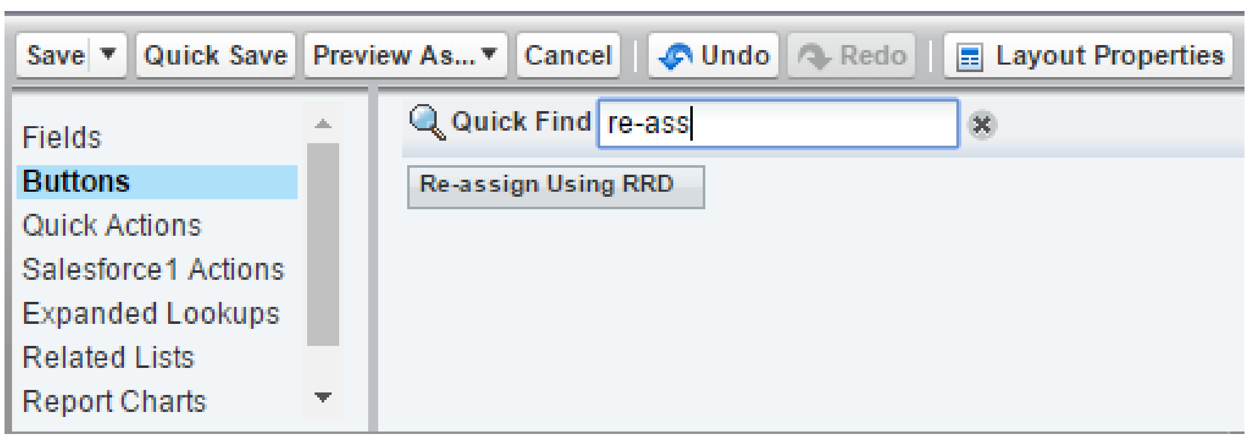


2. If there is any record in queue button will be visible to Distribute as shown image above.
   Once you click on Distribute button, Round robin will initiate the distribution and you will see the message as shown in image below, you can check the remaining records after refreshing the page after some time.



7) Re-assign from Detail

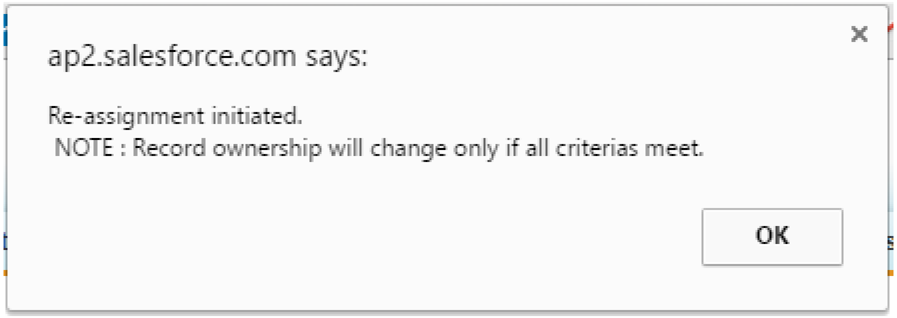
A single Lead/Case Record can be re-assign using "Re-assign using RRD" button from the detail page. You need to add the "Re-assign using RRD" button on detail page layout as shown in image below.



Drag and Drop "Re-assign Using RRD" button on Detail page as shown in the image below.

When Re-assignment of Lead/Case is needed, User can click on that button, the ownership will change if the resources and conditions are met.

Clicking on the button will bring up a popup as shown in image below.



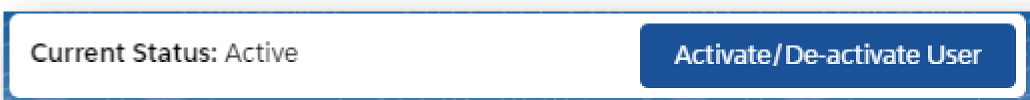
When you click on OK button it will refresh the page with new owner populated.

8) Release and Re-assign from Detail

A single Lead/Case Record can be release and re-assign using “Release and Re-assign using RRD” button from the detail page. You need to add the “Release and Re-assign using RRD” button on detail page layout as shown in image in “Release from Detail” section. This is a same functionality but only difference is that, once record is release through this functionality then record cannot be assign to “RRD Queue” as well as current owner.

9) Activate/ De-activate User Component

The Activate/Deactivate button toggles the availability of a user for assignment of records. You can’t toggle that for other users as users will have to do for themselves. It is designed to give users control on their availability when they are taking a break or a PTO etc.



10) Reports/Dashboards

1. Click on Reports tab
2. Search for Round Robin Reports and Round Robin Dashboard folder as shown in image below.

You will see all reports and Dashboards in this folder.

11) Custom MetaData Types

AuthSession Login Types: Define Login types used by CRM Users: Authsession in Salesforce represents an individual user session in an org as specified by Salesforce. Depending upon the login, the types could vary when logging in through integrations, third party applications, remote access, etc.

RRD provides users an ability to define the login type in the metadata records as shown below:

Step1. Go to the setup and in the 'quick find' box, search for custom metadata types

Step2. Click on manage records of RRD Configuration

Step3. Click on edit and enter the supported login types (Image shown below)