



Lead Assigner – User Guide

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Overview

Salesforce provides an out-of-the box Lead assignment rules using which one can assign Leads to user or Queue based on pre-defined criteria. But with such an Assignment rule in place there is always a possibility of single sales representative getting assigned to all Leads. Also, if Leads are routed to Queue, the sales representative needs to proactively pick the Lead from Queue and start working on it. With both these shortcomings in lead assignment we see reduced productivity and decreased turnaround time (due to manual assignment from Queue).

In today's world even a slight delay in response can cause loss of deals as a result there is a need of hour to address the above-mentioned concerns.

To address these issues, Lead Assigner comes to rescue with its easy to configure Shifts to perform Lead assignment in Round Robin fashion. It also provides capability to assign leads to only logged in users to improve the overall turnaround time.

Lead Assigner provides Salesforce administrator easy to use interface to configure Shifts. Configured Shifts use Round Robin mechanism to assign Leads to selected users so that no one sales representative is overloaded with all Leads. In addition to Round Robin assignment, this application provides mechanism for admin to perform lead assignment only for the currently logged in sales representatives. With such a feature in place, if currently 3 out of 5 sales representatives are logged into their account then Lead assignment will take place for only these 3 logged in users.

Lead Assigner application also allows admins to mark a sales representative inactive for assignment to cater to out-of-office scenarios.

Available Features

1. Create Shifts

1.1 Create Queue and add Sales representatives as queue members

SETUP
Queues

Queue
India Leads [Help for this Page ?](#)

[Edit](#) [Delete](#)

Label	India Leads	Queue Name	IndiaLeads
Queue Email		Send Email to Members	☐
Supported Objects	Lead		
Created By	Manasi Londhe, 4/5/2020, 2:04 PM	Modified By	Manasi Londhe, 4/27/2020, 2:32 PM

[View All Users](#)

Name	Type
Test user one	User
Test user two	User
Test user three	User

1.2 Create Business Hours

Create Business Hours with sales representative team Shift timings for each weekday.

You can also include holidays for each sales team.

Leads will not get assigned to the sales team outside their Shift timings and on any holiday.

SETUP

Business Hours

Holidays [1]

Business Hours Detail

Edit

Business Hours Name

Test Business Hours

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Business Hours

Sunday

11:00 AM to 2:00 PM

Monday

24 Hours

Tuesday

24 Hours

Wednesday

6:00 AM to 3:00 PM

Thursday

24 Hours

Friday

24 Hours

Saturday

24 Hours

Default Business Hours

☐

Active

☒

Created By

Manasi Londhe 4/10/2020, 11:33 AM

Last Modified By

Manasi Londhe 4/28/2020, 7:50 AM

Edit

Holidays

Add/Remove

Holiday Name

Description

Date and Time

Diwali

11/10/2020 All Day

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1.3 Create Shift record

Fill in details such as **Lead Type,Business Hours,Consider Logged in users only** etc and click save.

Note:- Make sure you populate Queue's developer name and not Queue's label.

me Shifts

New Shift

Information

* Shift Name

Software Shift

* Queue Name

USLeads

Active

☒

Consider Logged-in Users Only

☒

* Business Hours

Test Business Hours

×

* Lead Type

Software

Cancel

Save & New

Save

Shift

Software Shift

EditDeleteClone

Related

Details

Shift Name	Software Shift	
Queue Name	IndiaLeads	
Active	☒	
Consider Logged-in Users Only	☒	
Business Hours	Test Business Hours	
Lead Type	Software	
Created By	Test User, 4/28/2020, 8:17 AM	Last Modified By Test User, 4/28/2020, 8:17 AM

2. Deactivating a Shift

Uncheck the **'Active'** checkbox on the Shift record.

Shift

Software Shift

Related

Details

Shift Name	Software Shift	
Queue Name	IndiaLeads	
Active	☒	
Consider Logged-in Users Only	☒	
Business Hours	Test Business Hours	
Lead Type	Software	
Created By	Test User, 4/28/2020, 8:17 AM	Last Modified By Test User, 4/28/2020, 8:17 AM

3. Assign Leads to only logged in users

Check the **'Consider Logged-in Users Only'** checkbox on the Shift record.

Shift Software Shift

Related Details

Shift Name	Software Shift	
Queue Name	IndiaLeads	
Active	☒	
Consider Logged-in Users Only	☒	
Business Hours	Test Business Hours	
Lead Type	Software	
Created By	Test User, 4/28/2020, 8:17 AM	Last Modified By Test User, 4/28/2020, 8:17 AM

4. Deactivating/Removing sales representative from a particular shift

Go to Setup -> Queues -> Open shift's corresponding queue -> Click 'Edit' -> Remove the sales representative From the queue members-> click 'Save' .

SETUP Queues

Queue Members

To add members to this queue, select a type of member, then choose the group, role, or user from the "Available Members" and move them to the "Selected Members." If the sharing model for all objects in the Queue is Public Read/Write/Transfer, you do not need to assign users to the queue, as all users already have access to the records for those objects.

Search: for:

Available Members		Selected Members
User: Integration User	Add Remove	User: Test User
User: Security User		User: Test User One
User: User 2 General Q		
User: User 3 General Q		
User: User Genera Q		

5. Deactivating a sales representative temporarily from all the lead assignment as he/she is out of office or is on leave.

Go to Setup -> Users -> Users and click **Edit** on user record which needs to be deactivated.

Uncheck **Exclude From Assignment** checkbox and click **Save**.

SETUP
Users

Zip/Postal Code

Country

Single Sign On Information

Federation ID

Additional Information

Exclude From Assignment ☒

Locale Settings

Time Zone

Locale

Language

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails

Use Cases

1. Create a shift that runs for Leads 24/7

This is a simple scenario where admin does not want to introduce any complexity into Lead assignment so that all the Leads generated during the day should be assigned to pre-defined set of sales representatives in Round Robin fashion.

To achieve this, go to the corresponding Business Hour and **check 24 hours for each day** and click **Save**.

SETUP Business Hours

Step 1. Business Hours Name

Business Hours Name: Use these business hours as the default: ☐

Active: ☒

Step 2. Time Zone

Time Zone:

Step 3. Business Hours

Sunday	12:00 AM	to	12:00 AM	☒ 24 hours
Monday	12:00 AM	to	12:00 AM	☒ 24 hours
Tuesday	12:00 AM	to	12:00 AM	☒ 24 hours
Wednesday	12:00 AM	to	12:00 AM	☒ 24 hours
Thursday	12:00 AM	to	12:00 AM	☒ 24 hours
Friday	12:00 AM	to	12:00 AM	☒ 24 hours
Saturday	12:00 AM	to	12:00 AM	☒ 24 hours

2. Create Shift such that Leads generated between 9 AM - 3 PM are assigned to one set of users and those generated between 3 PM – 9 PM are assigned to another set of users.

To achieve this follow below mentioned steps -

- Create two Business hours. One with 9 am to 3 pm and other with 3 pm to 9 pm



SETUP

Business Hours

Holidays [1]

Business Hours Detail

Edit

Business Hours Name

Business Hours One

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Business Hours

Sunday

No Hours

Monday

9:00 AM to 3:00 PM

Tuesday

9:00 AM to 3:00 PM

Wednesday

9:00 AM to 3:00 PM

Thursday

9:00 AM to 3:00 PM

Friday

9:00 AM to 3:00 PM

Saturday

No Hours

Default Business Hours

☐

Active

☒

Created By

Test User 4/10/2020, 11:33 AM

Last Modified By

Test User 4/28/2020, 10:24 AM

Edit

Holidays

Add/Remove

Holiday Name

Description

Date and Time

Diwali

11/10/2020 All Day

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SETUP

Business Hours

Organization Business Hours

Help for this Page

Back to List: Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays [1]

Business Hours Detail

Edit

Business Hours Name

Business Hours Two

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Business Hours

Sunday

No Hours

Monday

3:00 PM to 9:00 PM

Tuesday

3:00 PM to 9:00 PM

Wednesday

3:00 PM to 9:00 PM

Thursday

3:00 PM to 9:00 PM

Friday

3:00 PM to 9:00 PM

Saturday

No Hours

Default Business Hours

☐

Active

☒

Created By

Test User 4/10/2020, 11:33 AM

Last Modified By

Test User 4/28/2020, 10:25 AM

Edit

- Create two Queues with different set of users

SETUP
Queues

Queue
Software Leads
Help for this Page ?

Edit
Delete

Label	Software Leads	Queue Name	SoftwareLeads
Queue Email		Send Email to Members	☐
Supported Objects	Lead		
Created By	Test User 4/5/2020, 2:04 PM	Modified By	Test User 4/28/2020, 10:30 AM

View All Users

Name	Type
Test user one	User
Test user two	User
Test user three	User

SETUP
Queues

Queue
Software Leads
Help for this Page ?

Edit
Delete

Label	Software Leads	Queue Name	SoftwareLeadsTwo
Queue Email	hi35@hi.com	Send Email to Members	☐
Supported Objects	Lead		
Created By	Admin LeadAssigner 3/27/2020, 9:39 AM	Modified By	Test User 4/28/2020, 10:32 AM

View All Users

Name	Type
Test User	User
test User4	User

- Create two shifts records each with different Business hours and Queues.

 Shift
Software Shift

Related

Details

Shift Name	Software Shift	
Queue Name	SoftwareLeadsTwo	
Active	☒	
Consider Logged-in Users Only	☒	
Business Hours	Business Hours Two	
Lead Type	Software	
Created By	 Test User , 4/28/2020, 8:17 AM	
Last Modified By	 Test User , 4/28/2020, 12:15 PM	

 Shift
Software Shift

Related

Details

Shift Name	Software Shift	
Queue Name	SoftwareLeads	
Active	☒	
Consider Logged-in Users Only	☒	
Business Hours	Business Hours One	
Lead Type	Software	
Created By	 Test User , 4/28/2020, 8:17 AM	
Last Modified By	 Test User , 4/28/2020, 10:37 AM	

3. Create shift such that one type of Lead is assigned to one set of users and those of other type is assigned to other set of users.

To achieve this follow below mentioned steps -

- Create a Business Hours.



SETUP

Business Hours

Holidays [1]

Business Hours Detail

Edit

Business Hours Name

Business Hours One

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Business Hours

Sunday

No Hours

Monday

9:00 AM to 3:00 PM

Tuesday

9:00 AM to 3:00 PM

Wednesday

9:00 AM to 3:00 PM

Thursday

9:00 AM to 3:00 PM

Friday

9:00 AM to 3:00 PM

Saturday

No Hours

Default Business Hours

☐

Active

☒

Created By

Test User 4/10/2020, 11:33 AM

Last Modified By

Test User 4/28/2020, 10:24 AM

Edit

Holidays

Add/Remove

Holiday Name

Description

Date and Time

Diwali

11/10/2020 All Day

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- Create two Queues with different set of users.



SETUP

Queues

Queue

Hardware Leads

Help for this Page

Edit

Delete

Label

Hardware Leads

Queue Name

HardwareLeads

Queue Email

hi35@hi.com

Send Email to Members

☐

Supported Objects

Lead

Created By

Admin LeadAssigner 3/27/2020, 9:39 AM

Modified By

Test User 4/28/2020, 10:47 AM

View All Users

Name

Type

Test User

User

test User4

User



SETUP

Queues

Queue

Software Leads

Help for this Page

EditDelete

Label	Software Leads	Queue Name	SoftwareLeads
Queue Email		Send Email to Members	☐
Supported Objects	Lead		
Created By	Test User, 4/5/2020, 2:04 PM	Modified By	Test User, 4/28/2020, 10:30 AM

View All Users

Name	Type
Test user one	User
Test user two	User
Test user three	User

- Create two Shift records with same Business Hours and different Queues so that Leads of type Hardware and Software are assigned to different set of users.



Shift

Hardware Shift

Related

Details

Shift Name	Hardware Shift	
Queue Name	HardwareLeads	
Active	☒	
Consider Logged-in Users Only	☒	
Business Hours	Business Hours One	
Lead Type	Hardware	

Created By

 Test User, 4/28/2020, 10:37 AM

Last Modified By

 Test User, 4/28/2020, 10:52 AM



Shift
Software Shift

Related

Details

Shift Name	Software Shift	
Queue Name	SoftwareLeads	
Active	☒	
Consider Logged-in Users Only	☒	
Business Hours	Business Hours One	
Lead Type	Software	

Created By

 [Test User](#), 4/28/2020, 8:17 AM

Last Modified By

 [Test User](#), 4/28/2020, 10:37 AM

4. Configure shift to execute assignment only for a specific day of Week .

For eg , If you want to configure Shift to execute assignment only on Monday then configure the corresponding Business Hours such that Shift timings are filled only on Monday.



SETUP
Business Hours

Holidays (0)

Business Hours Detail

Business Hours Name

Business Hours One

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Business Hours	Sunday	No Hours	Default Business Hours	☐
	Monday	9:00 AM to 3:00 PM		
	Tuesday	No Hours		
	Wednesday	No Hours		
	Thursday	No Hours		
	Friday	No Hours		
	Saturday	No Hours		

Active

☒

Created By

[Test User](#) 4/28/2020, 10:35 AM

Last Modified By

[Test User](#) 4/28/2020, 11:00 AM

Holidays

Add/Remove

No records to display

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Benefits

- Assign leads in Round Robin fashion.
- Improved turnaround time by assigning Leads to logged-in users only.
- Flexibility to add/remove users permanently or temporarily from assignment.
- Can be configured to execute rules on specific day of the week to handle part time users working on leads.
- Improved workload balance among sales representatives.
- Improved productivity as user does not need to manually assign or pick up Lead.