



Lead Assigner – Configuration Guide

Configuration

- Provide following permissions to profiles according to your needs.
- Assign '**Lead Assigner**' **permission set** to the users who are required to insert/edit Leads.
- Assign '**Create Shifts**' **permission set** to the users who are required to create Shift records.
- Provide **Edit** Permission to User object's **Exclude From Assignment** field .
- Following permissions to manage **Queues**

USER PERMISSIONS NEEDED	
To create or change queues:	Customize Application AND Manage Public List Views
To change queues created by other users:	Customize Application AND Manage Public List Views and Manage Users

- Following permissions to manage **Business Hours** and **Holidays**

USER PERMISSIONS NEEDED	
To set business hours:	Manage Business Hours Holidays

- Create a '**Lead Assigner Settings**' Custom settings record with the following details.
- **Name** - 'Execution Settings' (make sure you fill correct name).
- **Active** - This field states whether lead assigner app is executed or not
True if you want to use the Lead Assigner app for assigning Leads in your system.

False if you do not want to use Lead Assigner app for assigning Leads in your system.

- **Execute Immediately** -This states whether you want to execute assignment process in the same transaction context (Synchronously) or in other transaction(Asynchronously).

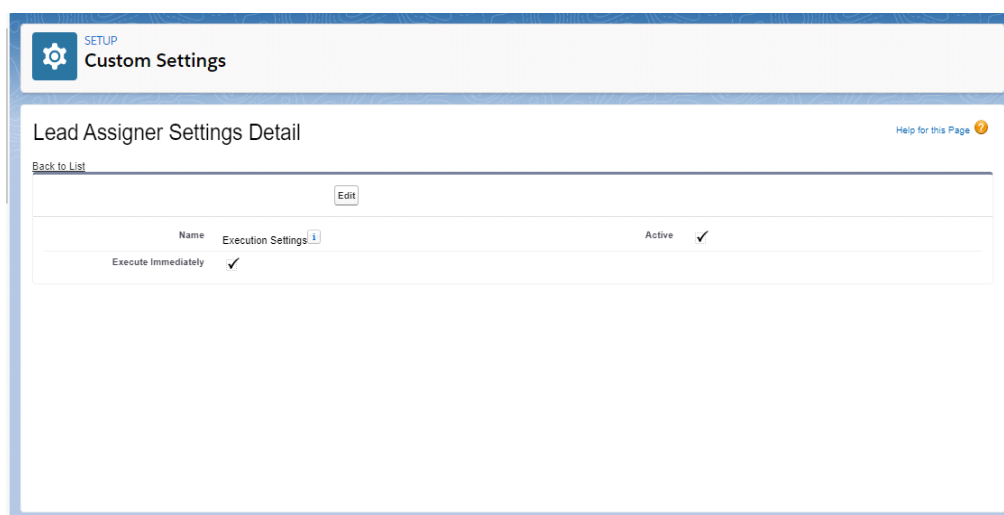
True if you want to execute process in same transaction context.

False if you want to execute process in different transaction context.

Following are the benefits If you configure the process to run in different transaction:

1. Increased limits.
2. The assignment process will take place after all the Triggers, Assignment rules, Process builders, Workflows etc have been executed.

Note:- Admin should make sure that standard Lead Assignment rules are not configured in the system if **Execute immediately is set to **True**.**



- **Add Exclude From Assignment custom field to the user page layout.**

SETUP

Users

Exclude From Assignment

☐

Allow Forecasting

☐

Call Center

Phone

Extension

Fax

Mobile

Email Encoding

General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Employee Number

Start of day

6:00 AM

End of day

11:00 PM

Used Data Space

24 KB

[View](#)

Used File Space

0 B

[View](#)

Last Login

4/29/2020, 12:50 PM

Last Password Change or Reset

3/27/2020, 10:25 AM

Failed Login Attempts

0

[i](#)

Individual

- Add **Type** custom field to required Lead page layout.

Title		Email	
Lead Source	--None--	Website	
Industry	--None--	* Lead Status	Open - Not Contacted
Annual Revenue		Rating	--None--
Type	Software	No. of Employees	400

Address Information

Address

Street