

Installation and Customization Guide

Records Distributor for Salesforce

Quick start Version: 1.1

Last updated: 11 Nov. 2012

INTRODUCTION

Records Distributor gives Salesforce administrators more control and efficiency over standard Lead and Case records' assignment. With this app, you can easily setup and maintain Round Robin, weighted assignment rules for your Sales and Support users.

Records are distributed either when they are inserted or updated, according to rules that you design. This simple app can work in conjunction with your standard assignment rules or replace them completely, according to your organization's needs.

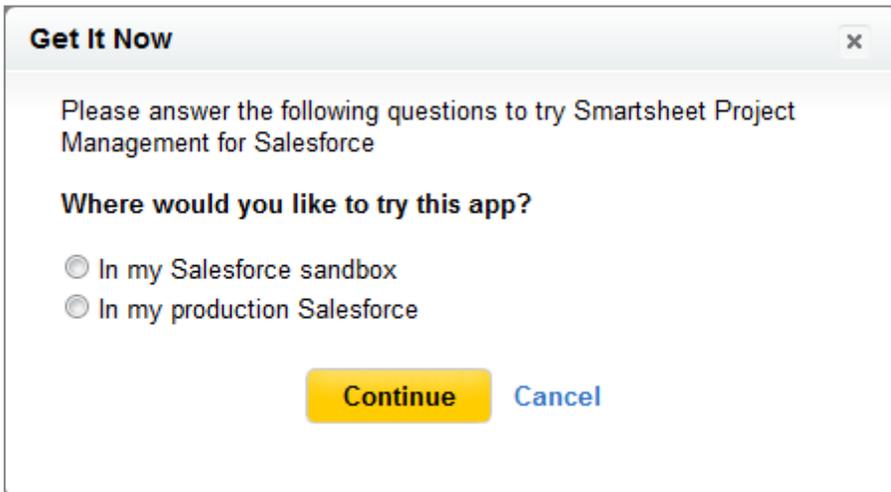
This document provides step-by-step instructions for the installation and customization of Records Distributor, to make it up and running within a few minutes.

GETTING RECORDS DISTRIBUTOR FROM APPEXCHANGE

First, you need to get the Records Distributor application from Salesforce.com's AppExchange. Go to the Records Distributor public listing: <https://appexchange.salesforce.com/listingDetail?listingId=a0N30000000ptZOEAY>

Ensure you are logged in with your Salesforce administrator account, using the **Login or Register** button in the page header, and click **Get It Now**.

Select if you would like to install the Records Distributor application in your Production or Sandbox Salesforce environment, then press **Continue**. The **Confirm Installation** page appears.



The screenshot shows a dialog box titled "Get It Now" with a close button (X) in the top right corner. The main text reads: "Please answer the following questions to try Smartsheet Project Management for Salesforce". Below this, the question "Where would you like to try this app?" is displayed. There are two radio button options: "In my Salesforce sandbox" and "In my production Salesforce". At the bottom of the dialog, there are two buttons: a yellow "Continue" button and a blue "Cancel" button.

Read and accept the terms and conditions, and then click **Install**. The **Package Installation Details** page shows up.

INSTALLATION

PACKAGE INSTALLATION DETAILS

When installing the **Records Distributor** in your Salesforce organization, review the apps' components and click "Continue" to begin the installation process.

| | |
|-----------------------|---------------------|
| Package Name | Records Distributor |
| Version Name | Official |
| Version Number | 1.0 |
| Publisher | Triple-i |
| Description | |

Continue Cancel

Review Package API access at Step 1 and click "Next".

Step 1. Approve Package API AccessStep 1 of 3

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

| | Read | Create | Edit | Delete | | Read | Create | Edit | Delete |
|-----------|------|--------|------|--------|---------------|------|--------|------|--------|
| Accounts | ✓ | ✓ | ✓ | ✓ | Ideas | ✓ | ✓ | ✓ | ✓ |
| Assets | ✓ | ✓ | ✓ | ✓ | Leads | ✓ | ✓ | ✓ | ✓ |
| Campaigns | ✓ | ✓ | ✓ | ✓ | Opportunities | ✓ | ✓ | ✓ | ✓ |
| Cases | ✓ | ✓ | ✓ | ✓ | Price Books | ✓ | ✓ | ✓ | ✓ |
| Contacts | ✓ | ✓ | ✓ | ✓ | Products | ✓ | ✓ | ✓ | ✓ |
| Contracts | ✓ | ✓ | ✓ | ✓ | Push Topics | ✓ | ✓ | ✓ | ✓ |
| Documents | ✓ | ✓ | ✓ | ✓ | Solutions | ✓ | ✓ | ✓ | ✓ |

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next Cancel

At step 2, let the selection to “Grant access to admins only”, or choose “Select security settings”, to include the user profile which manages assignments in your organization. Click “Next” when you are OK.

Step 2. Choose security level
Step 2 of 3

Select security settings:

- Grant access to admins only Users with your profile get full access (best for limited deployments)
- Grant access to all users All internal custom profiles get full access
- Select security settings User access set by profile (recommended for most packages)

Previous Next Cancel

At step 3, click “Install” to finalize the installation.

Step 3. Install Package
Step 3 of 3

The package is ready to be installed. Click Install to continue.

Previous Install Cancel

The installation is complete once you land on the following confirmation page:

Package Details
Help for this Pa

Records Distributor (Managed)

[« Back to List: Installed Package](#)

Install Complete

Follow any remaining steps in the app install guide to complete deployment.

Installed Package Detail Uninstall View Components View Dependencies

| | | | |
|-------------------------|---|---------------------------------------|--|
| Package Name | Records Distributor | Version Number | 1.0 |
| Language | English | First Installed Version Number | 1.0 |
| Version Name | Official | Package Type | Managed |
| Namespace Prefix | triple_i | API Access | Unrestricted (Enable Restrictions) |
| Publisher | Triple-i | Modified By | Adrien Bayles , 11/2/2012 1:39 PM |
| Description | | | |
| Installed By | Adrien Bayles , 11/2/2012 1:39 PM | | |

You are ready to go through the setup and configuration process.

SETUP AND CONFIGURATION

ADD THE DISTRIBUTORS TAB TO YOUR APP

Go to *Setup* -> *App Setup* -> *Create* -> *Apps* and select the app you want to add the tab to. Then select the *Distributors* tab and add it to your app.

The screenshot shows the 'App Marketing' configuration interface. On the left is a navigation sidebar with sections like 'Force.com Home', 'System Overview', 'Personal Setup', 'App Setup', and 'Develop'. The main area is titled 'App Marketing' and 'Custom App Edit'. It features a 'Choose the Image' section with a Salesforce logo and a 'Choose the Tabs' section with two lists: 'Available Tabs' and 'Selected Tabs'. The 'Distributors' tab is highlighted in the 'Selected Tabs' list. Below the lists are options for 'Overwrite users' personal custom app customizations' (checked), 'Default Landing Tab' (set to Home), and 'Assign to Profiles' (with checkboxes for Profile, Visible, and Default).

Now the **Distributors** tab must appear next to your app's other tabs.

The screenshot shows the top navigation bar of the Salesforce app. It includes the Salesforce logo, a search bar, and a row of navigation tabs: Home, Chatter, Campaigns, Leads, Accounts, Contacts, Reports, Dashboards, and Distributors. The 'Distributors' tab is highlighted with a red box.

ADD CHECKBOX TO USER PAGE LAYOUTS

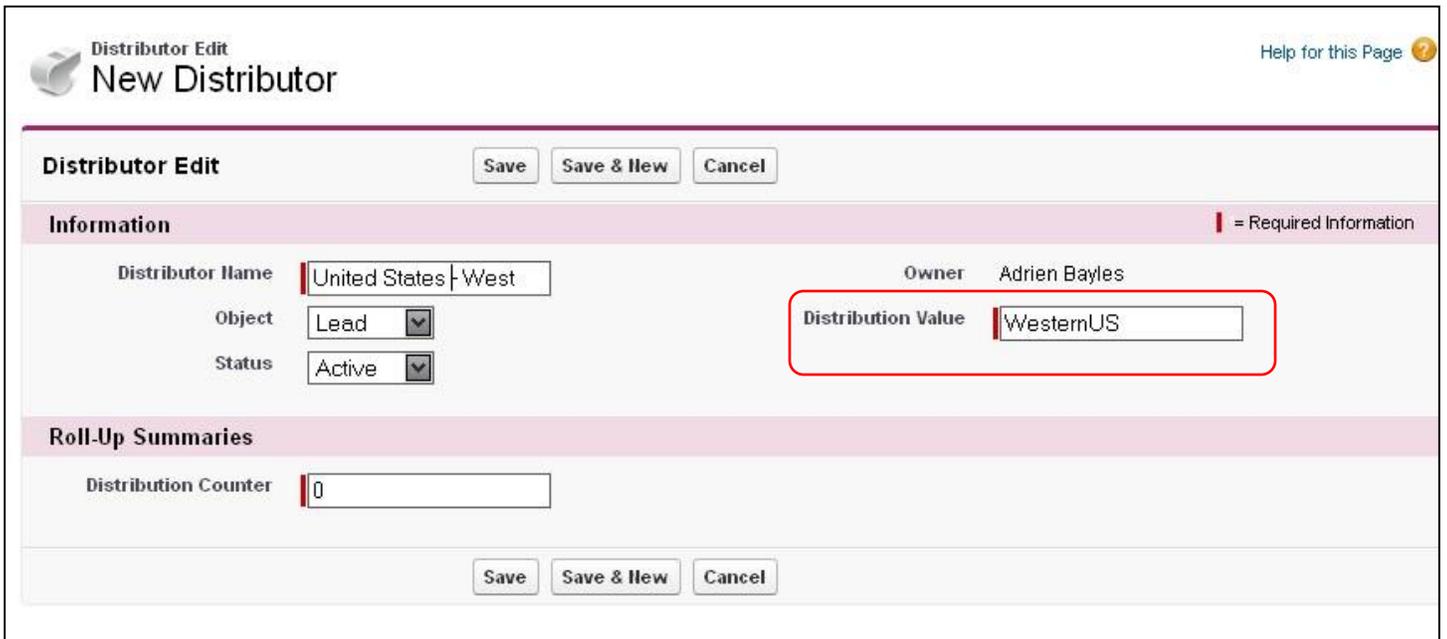
Go to Setup -> App Setup -> Customize -> Users -> Page Layouts and add the "Receive Records" checkbox field to the User page layout you use, as shown below:

The screenshot displays the Salesforce User Layout editor interface. At the top, there is a navigation bar with 'User Layout' and several links: 'Custom Console Components', 'Mini Page Layout', 'Mini Console View', 'Video Tutorial', and 'Help for this Page'. Below this is a toolbar with buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. The main workspace is divided into a 'Fields' list on the left and a 'Quick Find' search area on the right. The 'Fields' list contains 'Section', 'Blank Space', and 'Receive Records', with the latter highlighted by a red box. The 'Quick Find' search area has a search box labeled 'Field Name' and a search icon. Below the main workspace, there is a 'User Sample' section with a blue header. Underneath, there is a 'Highlights Panel' with a text input field containing 'Customize the highlights panel for this page layout...'. Below that is a 'User Detail' section with a grey background and the text 'Standard Fields (Cannot be modified on user page layouts)'. At the bottom, there is an 'Additional Information (Header visible on edit only)' section with a 'Receive Records' checkbox, which is checked and highlighted by a red box.

Then go to Setup -> Administration Setup-> Manage Users -> Users, and tick this box for each user that will be eligible for lead or case distribution.

CREATE DISTRIBUTORS

To create a distributor, simply go to the *Distributors* tab and click “New”



The screenshot shows the 'Distributor Edit' form with the following fields and values:

- Distributor Name:** United States West
- Object:** Lead
- Status:** Active
- Owner:** Adrien Bayles
- Distribution Value:** WesternUS
- Distribution Counter:** 0

Buttons at the top: Save, Save & New, Cancel. Buttons at the bottom: Save, Save & New, Cancel. A legend indicates that a red vertical bar next to a field name signifies required information.

Insert any name, select either “Lead” or “Case” object, and insert a *Distribution Value*. Leave other fields on their default value.

Once done, add Receivers on the Distributor record you have just created, by clicking “New Receiver” on the Receivers related list, at the bottom of the page.



The screenshot shows the 'Receivers' related list with the following elements:

- Buttons:** New Receiver, Activate, Deactivate
- Message:** No records to display
- Footer:** ^ Back To Top, Always show me fewer ▲ / ▼ more records per related list

The 'New Receiver' button is highlighted with a red box.

CREATE RECEIVERS

When inserting a new Receiver, link it to the appropriate Distributor, select the User who will receive assignments for this receiver and define a Quota. Leave other fields on their default value.

Receiver Edit
Help for this Page

New Receiver

Receiver Edit

Information = Required Information

| | |
|--|---|
| Status <input type="text" value="Active"/> | Distributor <input type="text" value="United States - West"/> |
| | Related User <input type="text" value="Sales User"/> |

Statistics

| | |
|---|--|
| Records Received <input type="text" value="0"/> | Last Distribution Time <input type="text" value=""/> |
| | [11/2/2012 1:52 PM] |

Parameters

| |
|--------------------------------------|
| Quota <input type="text" value="2"/> |
|--------------------------------------|

Repeat the Distributor creation and Receiver creation steps as many times as you need, to complete your customization.

Receiver
Edit Layout | Printable View | Help for this Page

Receiver 0000

< Back to List: Users

Receiver Detail

Information

| | |
|-----------------------------|---|
| Status Active | Receiver Number Receiver 0000 |
| User Status OK | Distributor United States - West |
| Health | Related User Sales User |

Statistics

| | |
|---------------------------------|------------------------|
| Records Received 0 | Last Distribution Time |
|---------------------------------|------------------------|

Parameters

| | |
|----------------------|----------------------|
| Quota 2 | Order 1 |
| First 0 | Last 1 |

Statistics

| | |
|--|-----------------------------------|
| Part on Distributed Records 0.00% | Part on Quota 40.00% |
|--|-----------------------------------|

System Information

| | |
|--|--|
| Created By Adrien Bayles, 11/2/2012 1:53 PM | Last Modified By Adrien Bayles, 11/2/2012 1:53 PM |
|--|--|

TEST YOUR CONFIGURATION WORKS AS EXPECTED

Optionally, add the *Distribution Value* and *Distributed* fields to the Lead or Case page layouts, so as to monitor records distribution.

In this example, we update a lead's *Distribution Value* on "WesternUS" and then, "Save".

| Lead Detail | | |
|---------------------|--|---|
| Lead Owner | Adrien Bayles [Change] | Phone |
| Name | test lead | Mobile |
| Company | test company | Fax |
| Title | | Email |
| Lead Source | | Website |
| Industry | | Lead Status |
| Annual Revenue | | Open - Not Contacted |
| Distribution Value | WesternUS | Rating |
| Distributed | <input checked="" type="checkbox"/> | No. of Employees |
| Address | | |
| Product Interest | | Current Generator(s) |
| SIC Code | | Primary |
| Number of Locations | | |
| Created By | Adrien Bayles , 10/28/2012 6:39 PM | Last Modified By |
| Description | | Adrien Bayles , 11/2/2012 1:58 PM |

We can see that the *Distributed* checkbox is checked. It means that the distribution has worked. The lead has been assigned to "Sales User", as defined in the Distributor previously created.

| Lead Detail | | |
|---------------------|--|---|
| Lead Owner | Sales User [Change] | Phone |
| Name | test lead | Mobile |
| Company | test company | Fax |
| Title | | Email |
| Lead Source | | Website |
| Industry | | Lead Status |
| Annual Revenue | | Open - Not Contacted |
| Distribution Value | WesternUS | Rating |
| Distributed | <input checked="" type="checkbox"/> | No. of Employees |
| Address | | |
| Product Interest | | Current Generator(s) |
| SIC Code | | Primary |
| Number of Locations | | |
| Created By | Adrien Bayles , 10/28/2012 6:39 PM | Last Modified By |
| Description | | Adrien Bayles , 11/2/2012 1:59 PM |

When going back to the corresponding distributor's detail page, the value of the *Distribution Counter* has been incremented by 1, as well as the number of records received by the *Receiver 0000*.

Distributor

United States - West

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) ?

[« Back to List: Custom Object Definitions](#)

[Receivers](#) 3

Distributor Detail [Edit](#) [Delete](#) [Clone](#)

▼ Information

| | | | |
|-------------------------|----------------------|---------------------------|--|
| Distributor Name | United States - West | Owner | Adrien Bayles [Change] |
| Object | Lead | Distribution Value | WesternUS |
| Status | Active | | |

▼ Roll-Up Summaries

| | | | |
|-----------------------------------|-------------------|----------------------------|---|
| Distribution Counter | 1 | Sum of Quotas | 5 |
| SUM of Records Distributed | 1 | Count of Receivers | 2 |
| Last Distribution Time | 11/2/2012 1:59 PM | MOD Count by Quotas | 1 |

▼ System Information

| | |
|---|---|
| Created By Adrien Bayles , 11/2/2012 1:52 PM | Last Modified By Adrien Bayles , 11/2/2012 1:59 PM |
|---|---|

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

Receivers [Receivers Help](#) ?

[New Receiver](#) [Activate](#) [Deactivate](#)

| □ | Action | Receiver Number | Related User | Status | Health | Order | Quota | Records Received | Part on Distributed Records | Last Distribution Time |
|---|--|-------------------------------|-------------------------------|----------|--------|-------|-------|------------------|-----------------------------|------------------------|
| □ | Edit Del | Receiver 0002 | Sales User | Inactive | ✘ | 0 | 1 | 0 | 0.00 | |
| □ | Edit Del | Receiver 0000 | Sales User | Active | ✔ | 1 | 2 | 1 | 100.00 | 11/2/2012 1:59 PM |
| □ | Edit Del | Receiver 0001 | Adrien Bayles | Active | ✔ | 2 | 3 | 0 | 0.00 | |

Now you are ready to set-up your own workflow field updates, manual updates, apex classes or triggers to make the distribution fire. This is the last part of the job and is only limited by your creativity.

To get technical insights on how the **Records Distributor** app works, please download the **User Manual** on the Records Distributor AppExchange listing.