Generic Lead Distribution Via Round - Robin

Background :

Its an application to distribute records among users automatically.

Problem Solution :

We are trying to solve the automatic record distribution drawback in Salesforce.com .

In Salesforce , the records are assigned manually to users/owners or they are just pilled up in the system.

Salesforce does not have a pre-defined automatic distribution engine that can assign records directly to users.
Salesforce do provide assignment rules for Lead/Case but it has lot of limitations and one of the biggest one is that it can only work for standard objects .

Example : Suppose an organization is using lead management system in salesforce.com. If records are created by Web to Lead form .The generated records are not assigned automatically to all active users .This limitation need to be solved .

Approach:

We can solve this assignment problem by Round-Robin process which will create a process where records are inserted to specific users in quantum time .
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Ex-

        Threshold/Weightage - 100
        Counter (Instantaneous change) - 0

Users-   Vikas {1,4.........}
             Chanderpal{2,5......}

Logic:

- Lead captured from any specified source.
- Check whether lead already exist or not in the system via owner id .
- If lead already exist then the lead would be inserted in the queue via trigger.
- If lead is new then it will be added with new owner id and added to the queue.
- Counts the total number of active users and assignment of lead via round-robin starts.
- After each assignment the value of count will be increased by one.
- When one lead is assigned to user, the next lead which is to be assigned, will stay in the queue.
- The lead assignment will be working till threshold /weightage == Count and the process will be terminated.

Objects Created:

- Team
- Team member
- Lead

Team -

- We made four repective Teams on Team object -

    NORTH ,SOUTH ,EAST , WEST .

Each team has a specific region or State assign to it

North - Haryana, Punjab , UP
South - Kerala, Karnataka, Tamil Nadu
West - Gujarat, Maharashtra , Rajasthan
East - West Bengal, Assam, Jharkhand

Team member —

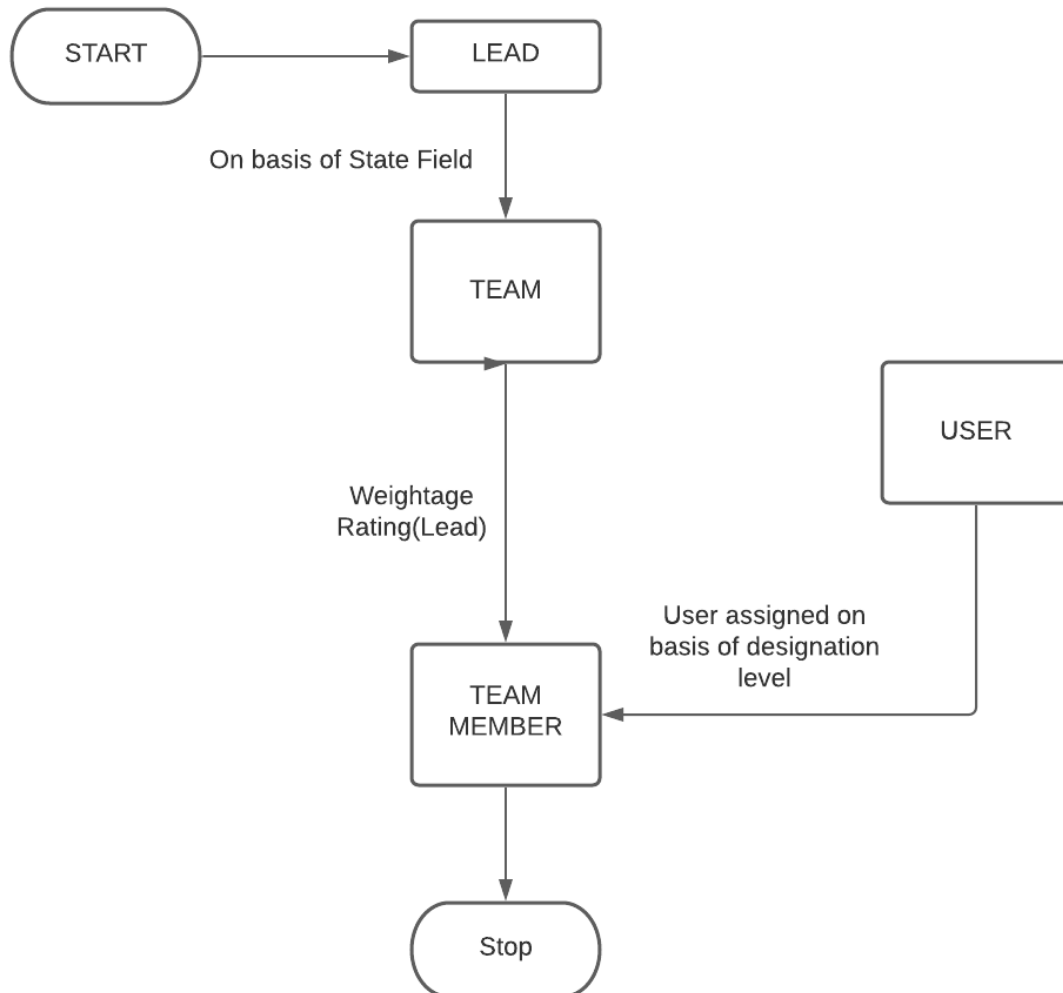Weightage, Counter,Lead (look-up),User

Lead —

State (Picklist) , Assigned Team (Region) (Formula field)

Relationship between different objects -

We have created relationships between Team and Lead , Team and Team member, Team member and Lead. Here Team Object is Parent object and Team Members is child object (junction obj b/w team and user) .
We have also created look-up b/w team member and user with User as the
 parent object

Flow :

Process Flow —
Lead --→ Team --→ Team member --→ Assignment on Region/State→Counter increased --->Weightage==Counter --->Counter reset--

STEPS -

Step 1- Lead creation, state select, team assigned
Step 2 -Trigger on lead object starts.

Step 3 -After insert event used because the changes will happen in different object.

Step 4 -We have created a List of team.

Step 5 -We have created a list of team member.

Step 6 -We have created a list of IDs of Lead object.

 Step 7 - Selected state leads to assigned team and a team member is selected.

Step 8 -The team member is randomly choosen .

Step 9 -Useris allocated to team member and counter value increased by 1.

Step 10 -Same process follows and when COUNTER == WEIGHTAGE counter is reset.