

# Using Q-assign Custom Objects for Member Lookup

## Description

Q-assign provides two custom objects to configure in **Assignment Group Rules**.

These custom objects are shipped with Q-assign and are accessible from Assignment Group settings to be configured in Member Lookup or Member Points Scoring Rules or Action Rules. Custom fields can be added on these objects (as per your requirements). They can also be used to enter combinations of attributes against each user or queue, similarly to Lead Assignment Rules or Case Assignment Rules.

1. **Q-assign User Attributes** object serves as a 1-1 mapping with User object. Attributes (fields) can be added to this object and later used by Q-assign configuration to run various types of matching rules while distributing records (such as Leads, Cases).
2. **Q-assign Member Lookup Rules:** This object serves as a 1-Many mapping with User object. Attributes (fields) can be added to this object and later used by Q-assign configuration to run various types of matching rules while distributing records (such as Leads, Cases).

## 1. Q-assign User Attributes

Set up and configure **Q-assign User Attributes** in Member Lookup as follow:

1. Go to **Setup| Create| Tab**
2. Under **Custom Object Tab**, Press New
3. Select **Q-assign User Attributes** as **Object**
4. Press **Save** (you can create as many records as needed in this object: **Setup| Object| Q-assign User Attributes| Fields**)
5. Go to **QA Assignment Groups**, select **Assignment Group**
6. Go to **Member Matching Rules | New**
7. Select **Rule Type** as **Member Lookup**

Parameters related to Q-assign User Attributes Object are discussed below:

- **Processing Order** - it defines the order in which Member Lookup will be processed as compared to other rules if they are configured. This is a number field and can be set as 0, 1, 2 etc. The lower the processing order, the earlier it gets processed.
- **Match Type** - it shows the option of which object contains the field to match member

1. **Match to Lookup Object:** It lists the lookup fields on the object of AG whose field will be matched with that of the user/Q-assign Objects
  2. **Match to Object:** It lists the fields of AG object whose field will be matched to that of the user/Q-assign Objects
  3. **Match to Fixed Value:** Match to fixed value on the object of AG whose field will be matched with that of the user/Q-assign Objects
- **<Object> Match Field** - this denotes the field of the object whose lookup is on AG's object. (Object) is different for AG's object and will be replaced by Lead or Case or the object the lookup points to.
  - **Operator:** Select the appropriate operator as equals, not equals, contains, doesn't contains
  - **Lookup Object:** Select Q-assign User Attributes in this field to lookup on their fields.
  - **Link to User via:** To whom you want to assign the records, it can be 'Owner ID' or 'User (Lookup)'
  - **Q-assign User Attributes Match Field** - the field of Q-assign User Attributes which is matched with field of object whose lookup is on AG's object
  - **Ignore Quota** - if checked, the object will be assigned to matching user anyway even if their assignment quota has exceeded and vice versa
  - **Ignore Cap** - if checked, the object will be assigned to matching user anyway even if their assignment cap has exceeded and vice versa

As per below screenshot, if **Lead** is object of Assignment Group then **Lookup Object** will show as **Q-assign User Attributes Lookup Field** and Link to User via is **Owner ID**

Member Matching Rule		Edit	Delete
Id	1		
Rule Type	Member Lookup		
Match Type	Match to Lead		
Lead Match Field	Lead Type		
Operator	equals		
Lookup Object	Q-assign User Attributes	Link to User Via:	Owner ID
Q-assign User Attributes Match Field	POC Lead Type		
Ignore Quota	<input checked="" type="checkbox"/>		
Ignore Cap	<input checked="" type="checkbox"/>		
		Edit	Delete

## 2. Q-assign Member Lookup Rules

Set up and configure **Q-assign Member Lookup Rules** in Member Lookup as follow:

1. Go to **Setup| Create| Tab**
2. Under **Custom Object Tab**, Press New
3. Select **Q-assign Member Lookup Rules** as **Object**
4. Press **Save** (you can create as many records as needed in this object: **Setup| Object| Q-assign Member Lookup Rules | Fields**)
5. Go to **QA Assignment Groups**, select **Assignment Group**
6. Go to **Member Matching Rules | New**
7. Select **Rule Type** as **Member Lookup**

Parameters related to Q-assign Member Lookup Rules Object are discussed below:

- **Processing Order** - it defines the order in which Member Lookup will be processed as compared to other rules if they are configured. This is a number field and can be set as 0, 1, 2 etc. The lower the processing order, the earlier it gets processed.
- **Match Type** - it shows the option of which object contains the field to match member
  1. **Match to Lookup Object:** It lists the lookup fields on the object of AG whose field will be matched with that of the user/Q-assign Objects
  2. **Match to Object:** It lists the fields of AG object whose field will be matched to that of the user/Q-assign Objects
  3. **Match to Fixed Value:** Match to fixed value on the object of AG whose field will be matched with that of the user/Q-assign Objects
- **<Object> Match Field** - this denotes the field of the object whose lookup is on AG's object. <Object> is different for AG's object and will be replaced by Lead or Case or to the object the lookup points to.
- **Operator:** Select the appropriate operator as equals, not equals, contains, doesn't contains
- **Lookup Object:** Select Q-assign Member Lookup Rules in this field to lookup on their fields.
- **Link to User via:** To whom you want to assign the records, it can be 'Owner ID' or 'User (Lookup)'
- **Q-assign Member Lookup Rules Match Field** - the field of Q-assign Member Lookup Rules which is matched with field of object whose lookup is on AG's object
- **Ignore Quota** - if checked, the object will be assigned to matching user anyway even if their assignment quota has exceeded and vice versa
- **Ignore Cap** - if checked, the object will be assigned to matching user anyway even if their assignment cap has exceeded and vice versa

As per below screenshot, if **Lead** is object of Assignment Group then **Lookup Object** will show as **Q-assign Member Lookup Rules** and Link to User via is **Owner ID**

<b>Member Matching Rule</b>		<a href="#">Edit</a>	<a href="#">Delete</a>
<b>Id</b> ?	2		
<b>Rule Type</b> ?	Member Lookup		
<b>Match Type</b> ?	Match to Lead		
<b>Lead Match Field</b> ?	Country		
<b>Operator</b> ?	equals		
<b>Lookup Object</b> ?	Q-assign Member Lookup Rules	<b>Link to User Via:</b>	Owner ID
<b>Q-assign Member Lookup Rules Match Field</b> ?	Country		
<b>Ignore Quota</b> ?	<input checked="" type="checkbox"/>		
<b>Ignore Cap</b> ?	<input checked="" type="checkbox"/>		
		<a href="#">Edit</a>	<a href="#">Delete</a>

Please contact us at [support@ortooapps.com](mailto:support@ortooapps.com) for any questions.