

BreezyRouter - Product Overview

Native Salesforce Lightning app for fair round-robin routing of leads, accounts, cases, opportunities, and custom objects.

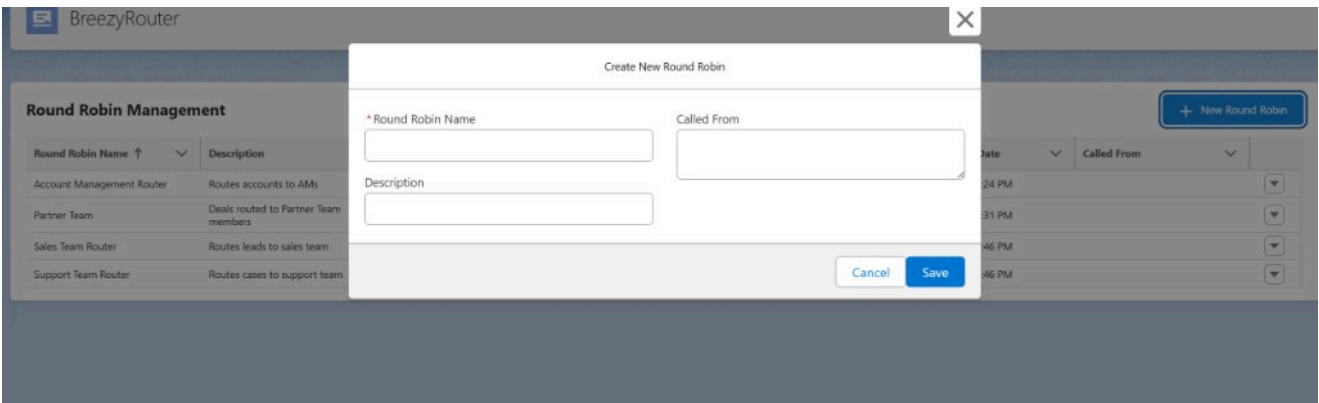
What it does

- Manage round robin queues in one admin table-create, edit, and delete routers
- Search org users and add members to each router
- Control Active / unavailable status globally or per router (PTO, capacity)
- Sortable columns for daily admin workflows
- Automation-ready via Flow, Apex, and Process Builder using the Called From field

Admin workflows

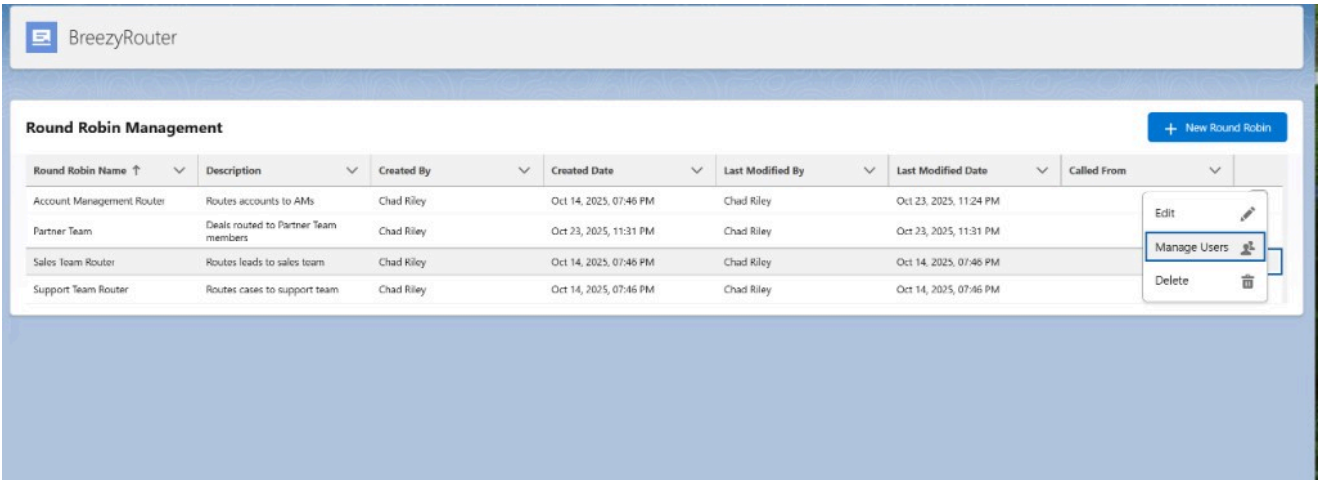
Create a new round robin from the management table:

Create New Round Robin modal



Use row actions to open Manage Users for any queue:

Row actions menu with Edit, Manage Users, and Delete



Search org users and add them to the selected round robin:

Round Robin User Management with search filters and current users table

Round Robin User Management

Round Robin: Sales Team Router

Add New Users

First Name: Alex, Last Name: , Username: , Email: , Title: , Profile Name: , Manager Name: , Role Name: , Country: , Is Active: ☒

☒ Name, ☐ Email, ☐ Username, ☐ Title, ☐ Profile, ☐ Manager, ☐ Role, ☐ Country

☒ Alex Thompson, alex.thompson@acmec... alex.thompson@acmec... Sales

Current Users

First Name	Last Name	Email	Title	Status	Routed Date	Created Date	Last Modified By	Last Modified Date
Jordan	Martinez	jordan.martinez@ac...		Active		Feb 21, 2026, 10:12 PM	Chad Riley	Feb 21, 2026, 10:12 PM

Update member status globally or for one router only:

Edit Status dialog with Apply to all Round Robins checkbox

Round Robin User Management

Round Robin: Sales Team Router

Add New Users

First Name: Alex, Last Name: , Username: , Email: , Title: , Profile Name: , Manager Name: , Role Name: , Country: , Is Active: ☒

Current Users

First Name	Last Name	Email	Title	Status	Routed Date	Created Date	Last Modified By	Last Modified Date
Jordan	Martinez	jordan.martinez@ac...		Active		Feb 21, 2026, 10:12 PM	Chad Riley	Feb 21, 2026, 10:12 PM
Alex	Thompson	alex.thompson@acm...		Active		May 24, 2026, 11:59 AM	Chad Riley	May 24, 2026, 11:59 AM

Edit Status

User: Jordan Martinez

Status: Active

☒ Apply to all Round Robins
Uncheck to apply only to this Round Robin.

Typical use cases

- Sales lead routing to SDRs and AEs
- Account assignment to account managers
- Case routing to support tiers
- Partner deal registration distribution

Permission sets

- BreezyRouter Admin - routing admins who configure routers and membership
- BreezyRouter Manager - supervisors who manage team availability
- BreezyRouter User - team members who receive routed records

Your Salesforce admin assigns the appropriate set to each user.

Install summary

Deploy from the BreezyGTM GitHub repository into your Salesforce org. Assign BreezyRouter Admin to routing admins, then add users to routers from the BreezyRouter Lightning app.

Trial and consulting

Companies can install BreezyRouter for a free 30-day trial. BreezyGTM also offers consulting on setup and customization.

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