



Lead.Assign.Distribute

**Automatic Assignment and
Distribution of Entities using
Round Robin & Capacity
Algorithm**



Lead.Assign.Distribute

crm@inogic.com

inogic

Key Features

Even Distribution

Distribute workloads evenly among the team in a sequential pattern using Round Robin algorithm

Fair Distribution

Assign records depending upon the capacity defined for each individual user to avoid over allocation

Selection Criterion

Ability to define selection criterion and assignment rules for processing records

Set up User availability

Support to set user availability for assigning Leads (or other entities)

Queues

Based off native queues in Dynamics 365 CRM

Dashboards

Monitor and Analyze distribution of Leads to each user with the helps of Dashboards

- Support to assign work items based on period (Daily, Weekly, Monthly)



Available For

SUPPORTED VERSIONS

- MICROSOFT DYNAMICS 365 v9.x and above
- Dataverse (Power Apps)

DEPLOYMENTS

- ON-PREMISES
- DYNAMICS 365 ONLINE

Configure Entities for Auto-Assignment

Dynamics 365

Lead Assignment And Distribution Aut...

Home

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Administration

Dashboards

Users

Queues

Teams

Vacations

Status Types

License Registrati...

Assignment Confi...

Assignment Error ...

Lead.Assign.Distribute

✓ ACTIVATE

SEND REQUEST

Notification Details

(Notify User and Inogic about issues regarding licensing.)

From

To

Notify To Inogic

Notification Int...

Once a day

Once a week

Once a month

▶ License Registration using (*.lic) file

◀ Enable Assignment Configuration

* If entity is not appearing in the 'Available Entities' list then check if that entity is enabled for the Queue. To enable it for the queue go to Settings->Customizations-> Select Entity and enable it for the Queue.

* You must have Read, Write and Append privilege for the entity

Available Entities (Entities that are enabled for Queue)

Appointment

Assignment Configuration

Campaign Activity

Campaign Response

Case


Customer Voice alert

>>


<<

Selected Entities

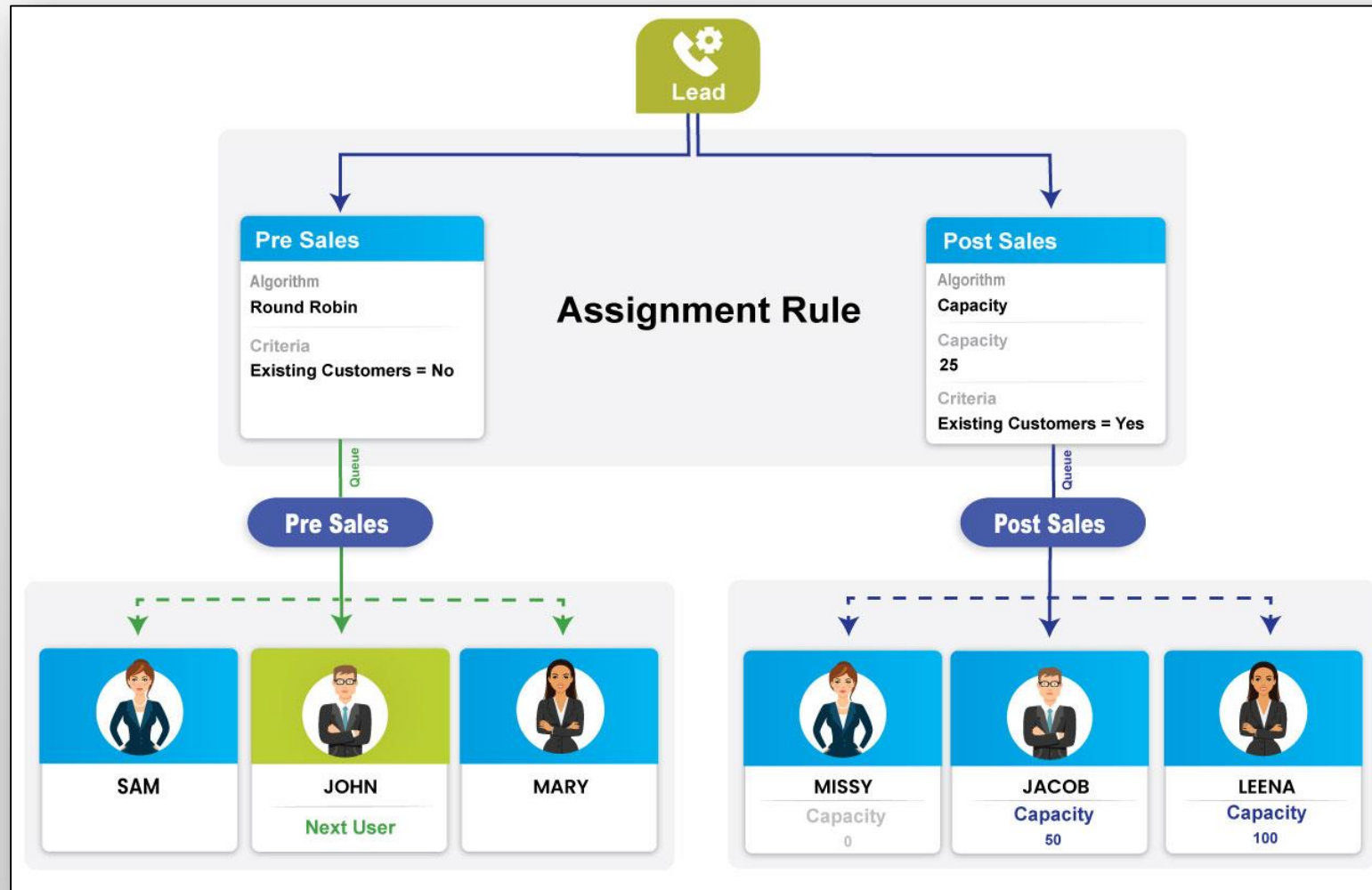
Lead

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Lead Assignment Use Case



Assign Leads based on Rules using Round Robin or Capacity Algorithm

Leads from Website - Saved

Assignment Rule

Round Robin

Lead Assignment Queue

General

User Workload

Related

Name

Leads from Website

Description

Assign Leads from website

Assignment Configuration

Lead

Execution Criteria

Criteria Mode

Advanced

Fetch Xml

<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
<entity name="lead">
<attribute name="fullname" />
<attribute name="createdon" />
<attribute name="statuscode" />
<attribute name="subject" />
<attribute name="leadid" />
<attribute name="ownerid" />
<order attribute="createdon" descending="true" />
</entity></fetch>

Execution Order

0

Consider Availability

Yes

Queue

Lead Assignment Queue

Assignment Properties

Assignment Algorithm

Round Robin

Maximum Work Items Allowed To Be Assigned

5

Period

Overall

Open Work Item Statuses

Open-Contacted

Open-New

As you have selected Capacity algorithm, you need to mention capacity, on user entity, for each member of Queue selected in this Assignment Rule. For user with no capacity, auto assignment will not work.

Lead Capacity Rule - Saved

Assignment Rule

Capacity

Capacity Queue

General

User Workload

Related

Name

Lead Capacity Rule

Description

Assign Leads based on user capacity

Assignment Configuration

Lead

Execution Criteria

Criteria Mode

Simple

View

All Leads

Fetch Xml

<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
<entity name="lead">
<attribute name="fullname" />
<attribute name="createdon" />
<attribute name="statuscode" />
<attribute name="subject" />
<order attribute="createdon" descending="true" />
<attribute name="ownerid" />
<attribute name="leadid" />
</entity></fetch>

Execution Order

1

Consider Availability

Yes

Queue

Capacity

All members of the selected Queue must be added in the 'Lead Assignment and Distribution Automation' team and must have the 'Lead Assignment User' security role. Also the members should have appropriate privileges for the entity so that the records can be assigned.

Assignment Properties

Assignment Algorithm

Capacity

Maximum Work Items Allowed To Be Assigned

10

Period

Overall

Open Work Item Statuses

Open-New

Unit Effort Required For Work Item

2

Set up User Capacity for Work Distribution

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Home Recent Pinned Administration Dashboards **Users** Queues Teams Vacations Status Types License Registration Assignment Configur... Assignment Error Logs Help

Save Save & Close New Connect Delete Refresh Check Access Reassign Records Join Teams

Harry Jameson - Saved
User

Assignment Details Details Administration Summary Omnichannel Related

Capacity & Queue

Base Capacity	20
Available Capacity	16

Availability Status **Available**

Queues Add Existing Queue Refresh

Name ↑	Incoming Email ↓	No. of Members ↓	Queue Items ↓
<Demo User>		1	0
<Lead Assignment and Distribution Aut...		3	0
<try1>		89	0



Set up User Availability

Short vacation - Saved
Vacation

General Related

Name	*	Short vacation	Description	---
User	*	Rick McKenzie		
Status	*	On Vacation		

Vacation Period

Start Date	*	1/26/2022
End Date	*	1/31/2022

Dynamics 365 | Lead Assignment And Distribution Aut...

← Show Chart **+ New** Delete Refresh Email a Link Flow Run Report Excel Temp

Active Vacations ▾

Name ↑ ▾	User ▾	Start Date ▾	End Date ▾	Status ▾
Short vacation	Rick McKenzie	1/26/2022	1/31/2022	On Vacation
Sick Leave	Harry Jameson	1/18/2022	1/23/2022	Sick Leave

Administration

- Home
- Recent ▾
- Pinned ▾
- Dashboards
- Users
- Queues
- Teams
- Vacations**
- Status Types

On-Demand Assignment Button

Dynamics 365 CRM Hub CORE > Leads

Show Chart Edit **Run Assignment** Qualify Disqualify Delete Add to Marketing List Assign Share

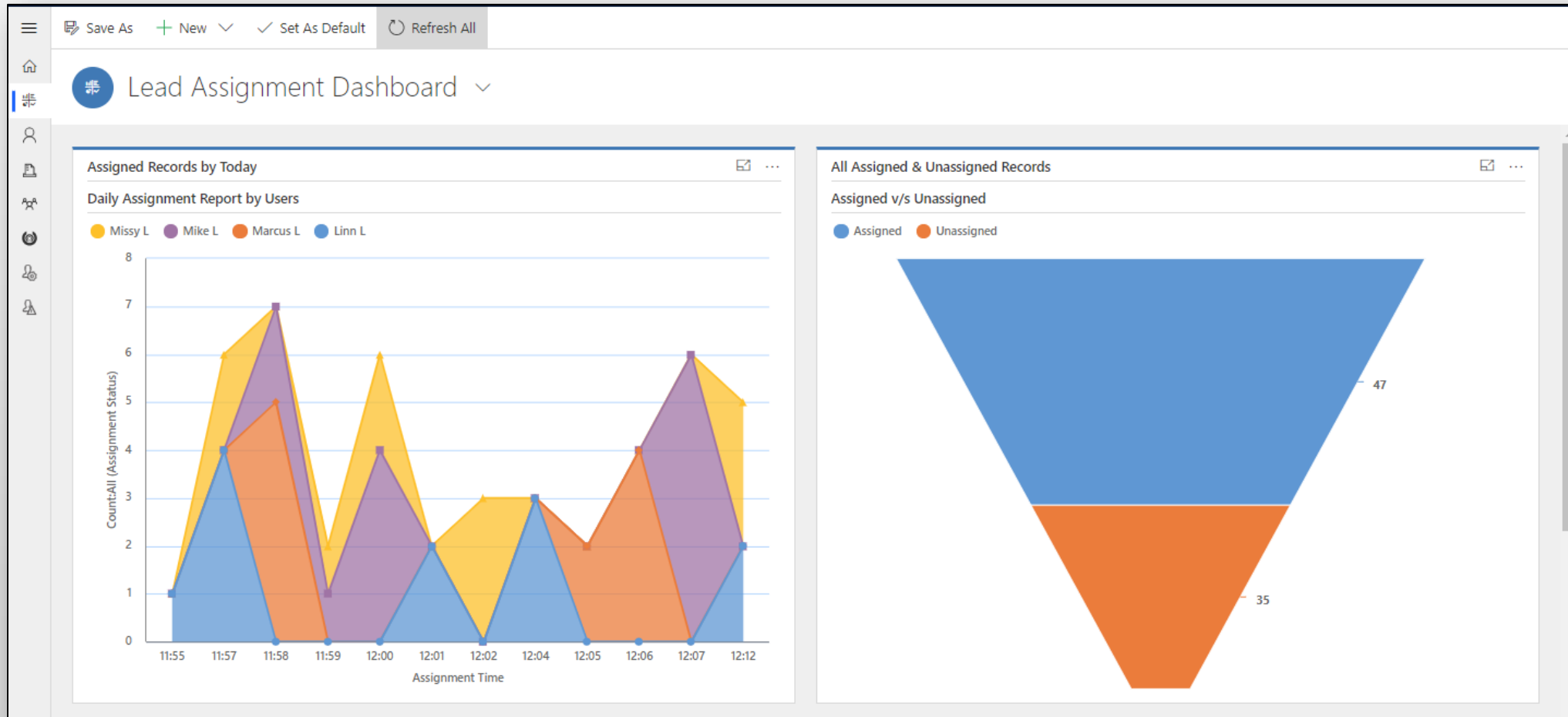
My Open Leads

Search for records

Name	Topic	Status Reason	Created On
✓ Czaplinski	Interested in online only store	New	29-11-2019 12:43
✓ Guillereault	Interested in our newer offerings	New	29-11-2019 12:43
✓ Sandblom	New store opened this year - follow up	New	29-11-2019 12:43
Svoboda	New store opened this year - follow up	New	29-11-2019 12:43
Sama	Interested in Large format printers	New	29-11-2019 12:43
Skursky	Interested in Plotters	New	29-11-2019 12:43
Cutsforth	Good prospect	New	29-11-2019 12:43
Pinilla	Likes our products	New	29-11-2019 12:43
Danaher	Interested in online only store	New	29-11-2019 12:43



Dashboard Visualization



Next Steps

Learn more about [Lead Assignment and Distribution Automation](#) today.

Get your free **Lead Assignment and Distribution Automation** trial from [Microsoft AppSource](#) or [our website!](#)

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