Lead.Assign.Distribute

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

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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)

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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...

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✔ 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)		Selected Entities
Appointment	>>	Lead
Assignment Configuration	<<	
Campaign Activity		
Campaign Response		
Case		
Customer Voice alert		

Administration

- Dashboards
- Users
- Queues
- Teams
- Vacations
- Status Types
- License Registrati...
- Assignment Confi...
- Assignment Error ...
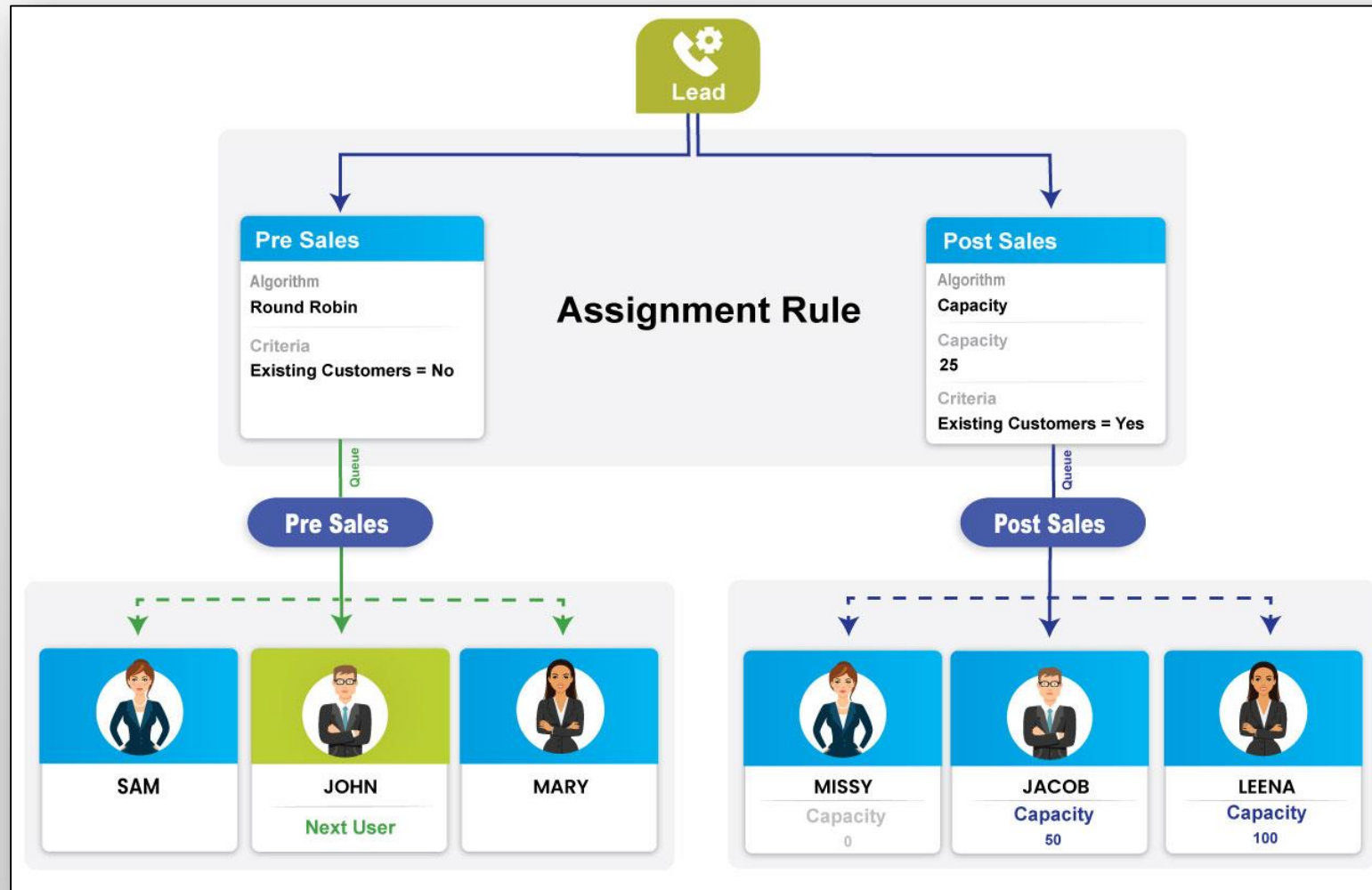
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Lead Assignment Use Case

Assign Leads based on Rules using Round Robin or Capacity Algorithm

Leads from Website - Saved
Assignment Rule

Round Robin — Assignment Algorithm
Lead Assignment Queue — 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" />`

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 — Assignment Algorithm
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

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Set up User Capacity for Work Distribution

Set up User Availability

On-Demand Assignment Button

Dashboard Visualization

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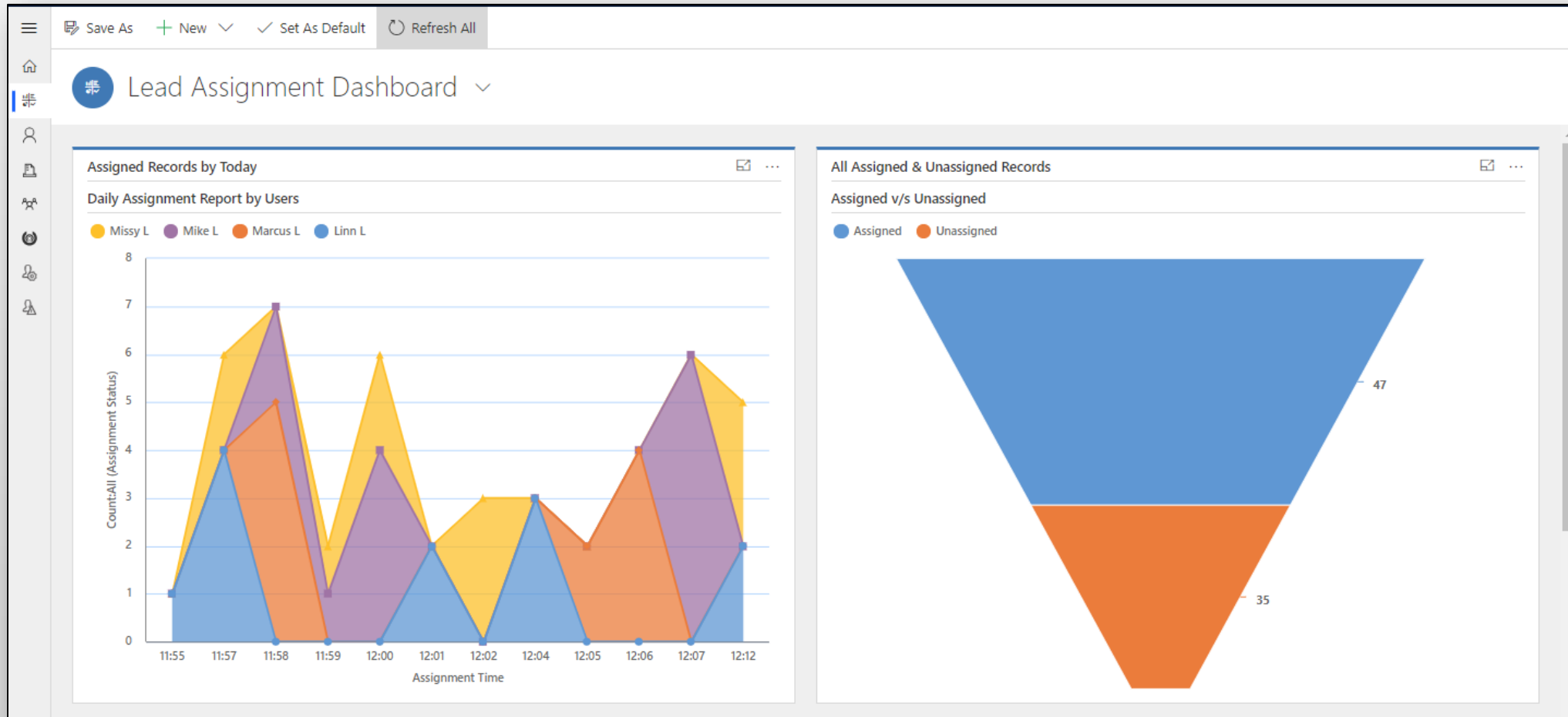
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Next Steps

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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