Lead.Assign.Distribute

inogic

User Manual

Content

Introduction

Lead Assignment and Distribution Automation is a productivity app that enables systematic allotment/assignment of leads to respective Dynamics 365 CRM users. It helps managers to allocate and distribute incoming leads and customer queries in an organized way. This ensures fair distribution of workload within each team. Automated distribution and assignment improves efficiency which results in higher level of customer satisfaction and in turn higher ROI.

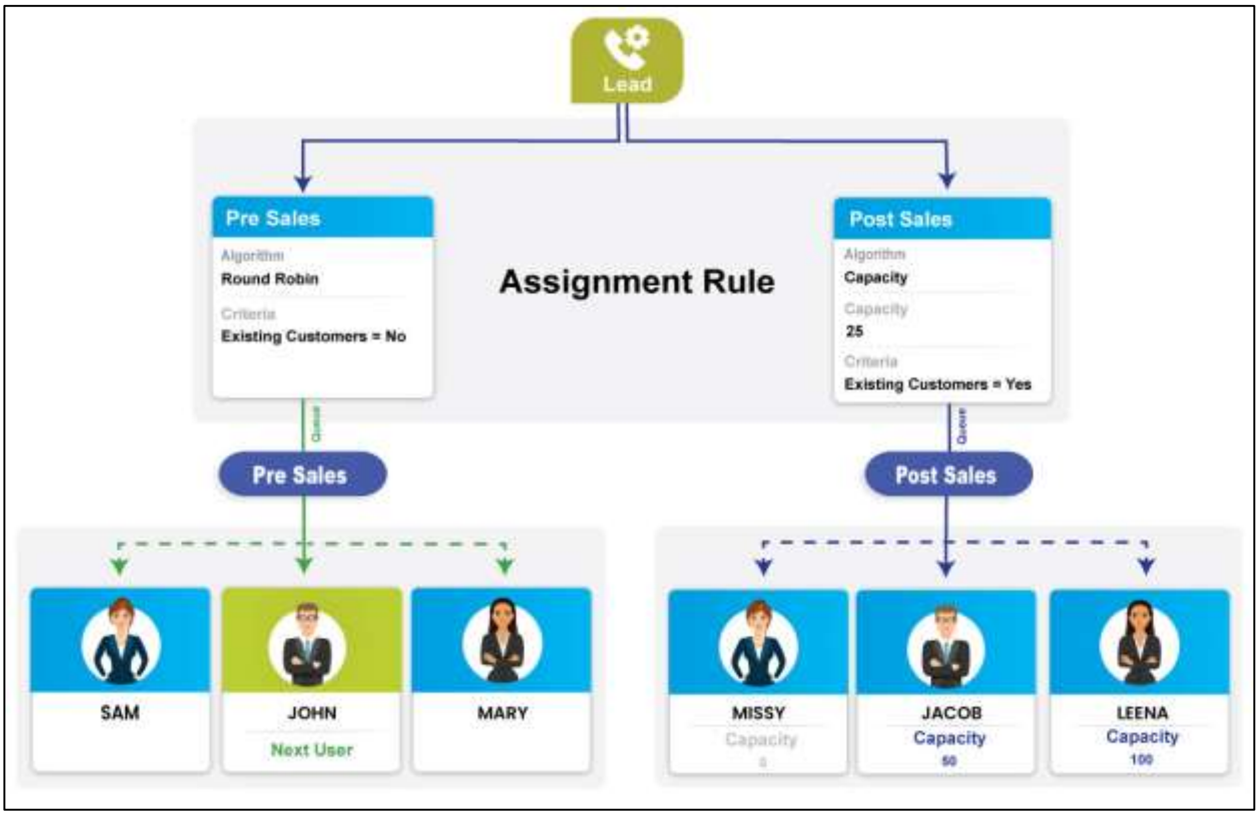
Salient Features:

- Supports OOB as well as Custom Entities
- Fair distribution of Leads with Round Robin algorithm
- Assign leads depending on individual user capacity
- Set the sequence of the users that the records are assigned in
- Queue and assign Leads based on Round Robin algorithm
- Allot pending assignments and awaiting Leads on-demand or through waiting workflow
- Set Priority or Criteria while assigning Leads
- Support to set user availability for assigning Leads (or other entities)
- Support to assign work items based on period (Daily, Weekly, Monthly)
- Monitor and Analyze distribution of Leads with Dashboards

Available for: Microsoft Dynamics 365 CRM 9.x and above, Dataverse (Power Apps).
Deployment: On-Premises and Online

Understanding working of Lead Assignment and Distribution Automation

The following diagram illustrates the scenario to understand how Lead Assignment and Distribution Automation works.



In this example, there are two types of leads coming into the CRM system. The leads from new customers and the leads from the existing customers. Two teams have been created in the organization to work on these leads. The 'Pre Sales' team to work on the leads that has been coming from the new customers and another team 'Post Sales' to work on the leads that has been coming from the existing customers.

For both the team two different queues have been created and appropriate number of members added into it. In the above example, two Assignment Rules have been created – One, to distribute Pre Sales leads among the members of the 'Pre Sales' queue in Round Robin fashion and another Assignment Rule to distribute the Post sales leads among the members of the 'Post Sales' queue based on the individual capacity. In each of these two Assignment Rules appropriate criteria and algorithm have been defined. In Post Sales assignment rule, Capacity unit has been defined to 25.

When a new lead with no existing customer enters into CRM or is created in CRM, the assignment process identifies the Queue as 'Pre Sales' queue and then identifies the user to which the new lead is to be assigned. In Round Robin, the process checks who the next user to be assigned is and then continues the assignment in the loop.

When a new lead with existing customer enters into CRM or is created in CRM the assignment process identifies the Queue as 'Post Sales' queue and then identifies the user with sufficient capacity to handle the lead. As the capacity unit has been set to 25, the capacity of new incoming lead is equivalent to 25. In order to assign this lead to the user, the user must have the available capacity as 25 or above. In this example, Jacob's capacity is 50, so the lead gets assigned to him. Once the lead is assigned to him, the available Capacity of Jacob is reduced by 25. Now, his capacity will be just 25.

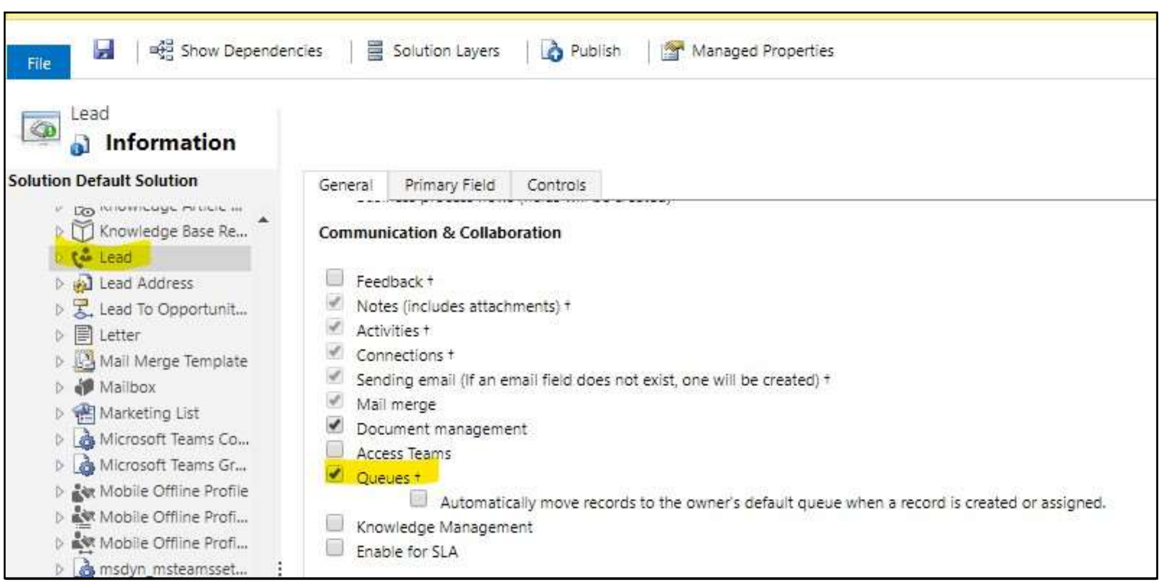
Assignment Configuration

As mentioned in the features list this application supports automated assignment for Lead and other entities too.

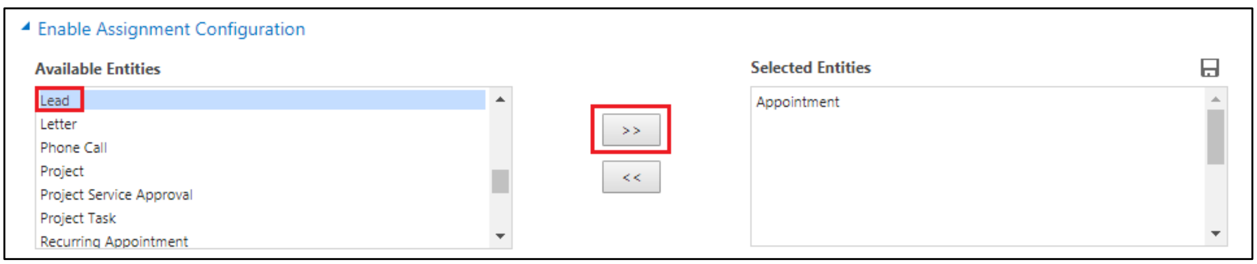
In order to assign records for OOB and custom entities, Assignment Configuration for that entity needs to be enabled.

1. To enable Assignment Configuration navigate to **Lead Assignment and Distribution Automation App → License Registration → Enable Assignment Configuration.**

Note: To enable assignment configuration it is necessary to enable Queue for OOB entities.



2. Users can select the entities from the list of **Available Entities** and move them to the list **Selected Entities.**

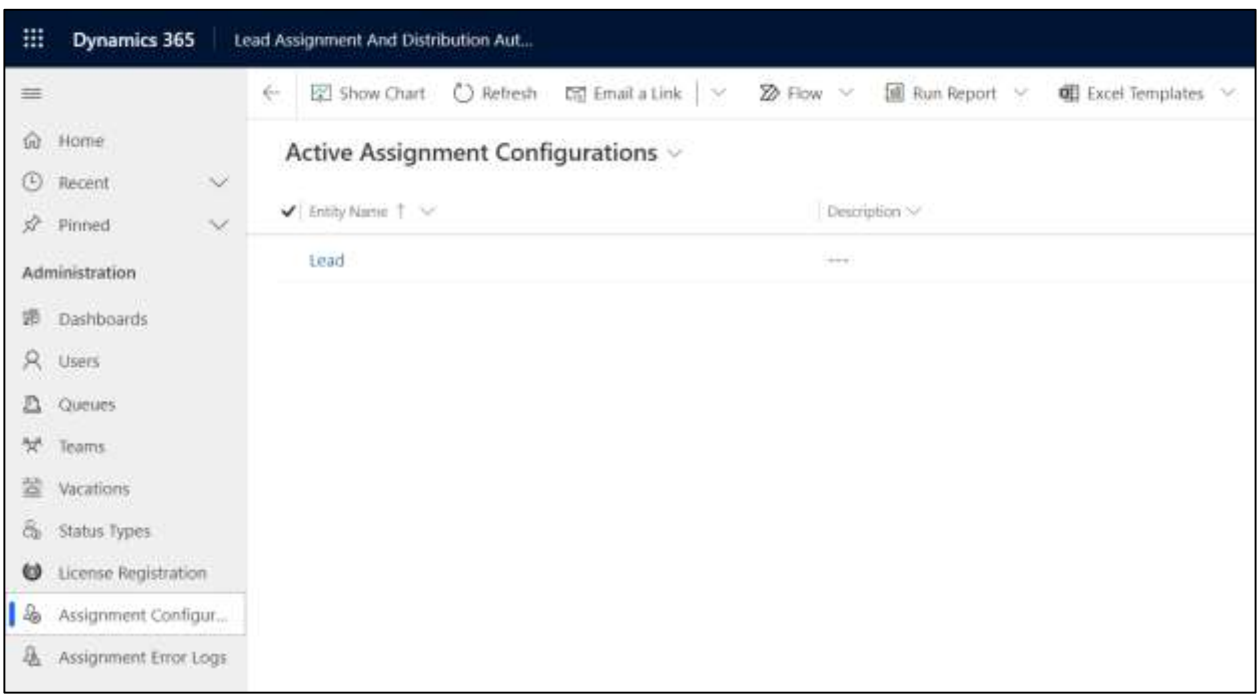


3. Click on **Save** button to enable Assignment Configurations for these selected entities.

4. At any time users can disable the Assignment Configuration for a particular Entity by removing the entity from **Selected Entities** list.

5. You can see Appointment has been removed from **Selected Entities** grid and is now again available in **Available Entities** grid. Click on **Save** in order to retain these settings.

6. To view the Assignment Configurations go to **Lead Assignment and Distribution Automation App → Assignment Configurations** where all the enabled Assignment Configurations can be viewed.

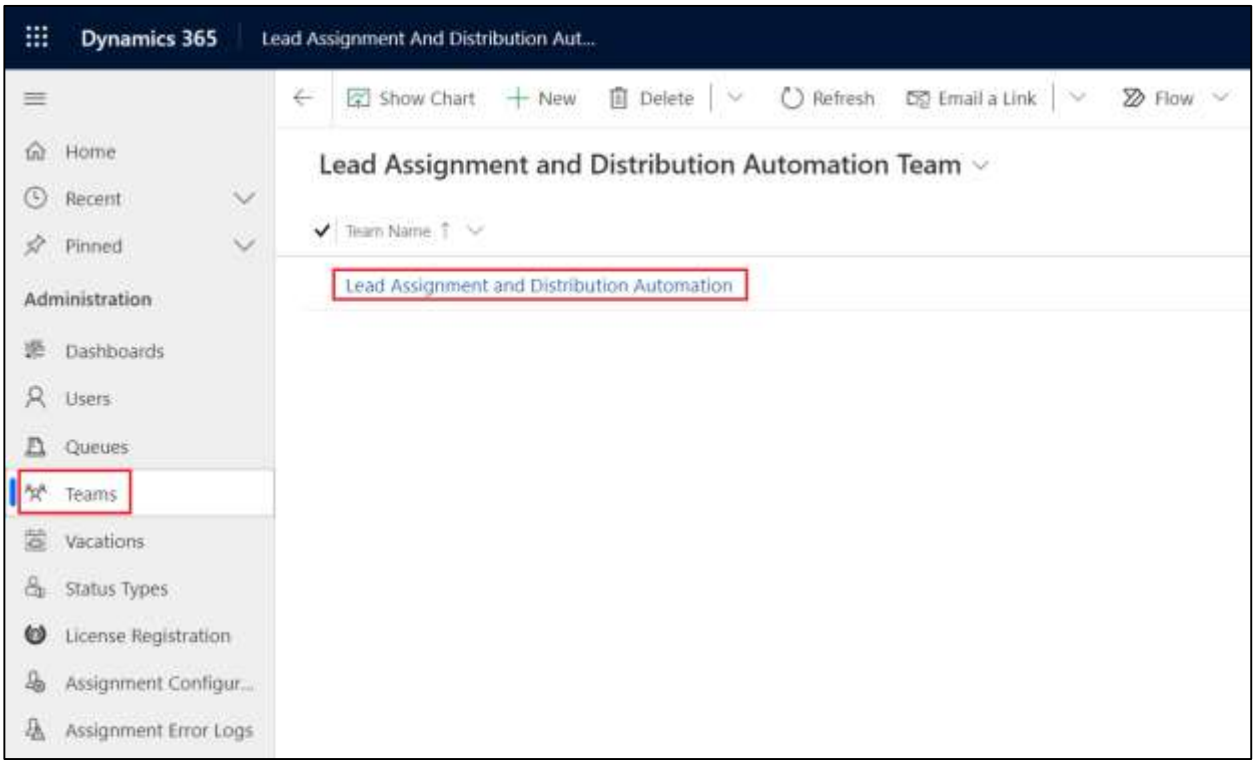


Set up Users

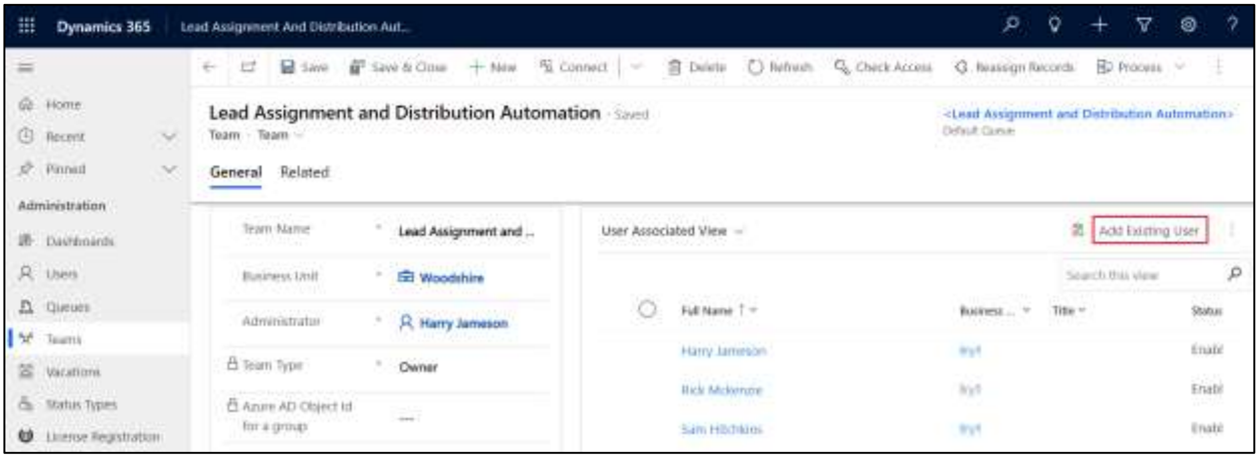
To assign Leads generated from various sources to the users, first it is necessary to set up the users who will be automatically assigned leads or other entity records. After you install the solution and activate the license, a team named as 'Lead Assignment and Distribution Automation' gets created in CRM.

Add all the users whom you want to assign leads automatically through this application in the 'Lead Assignment and Distribution Automation' team. To add team members follow the steps given below:

1. Navigate to **Lead Assignment and Distribution Automation App→Administration→Teams.**



2. Select the team 'Lead Assignment and Distribution Automation', add team members and click on 'Save'.



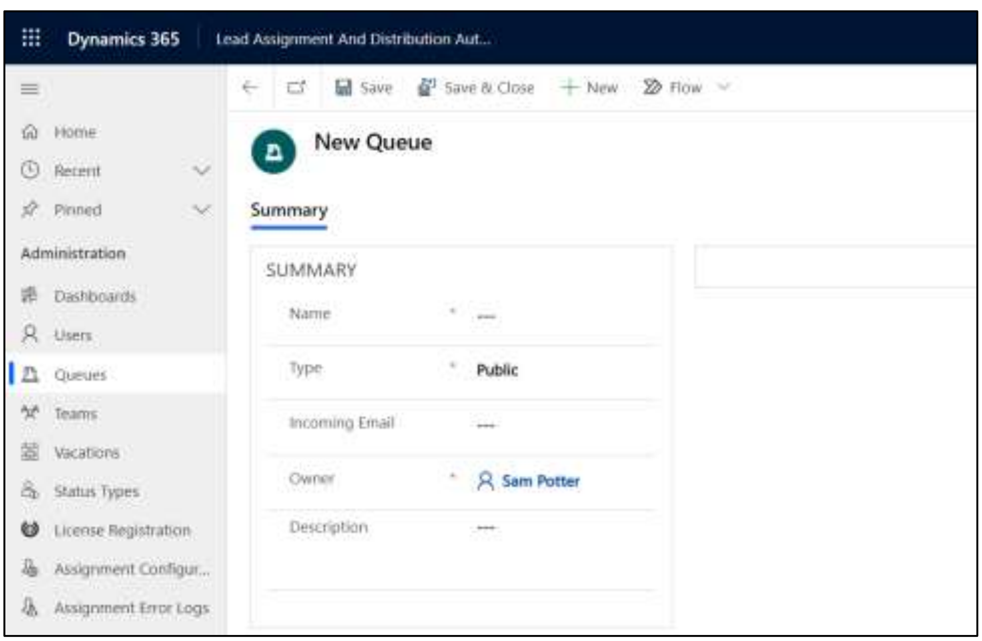
Also the users that have been added in the team must have **'Lead Assignment and Distribution Automation User'** security role.

Set up Queues

Once the members are added to the teams, next step is to set up Queues. It is necessary to add members to Queue in order to assign Leads to the respective users. If you have existing private queues then use that or create new queues. Follow the steps given below to create a new queue:

For Online

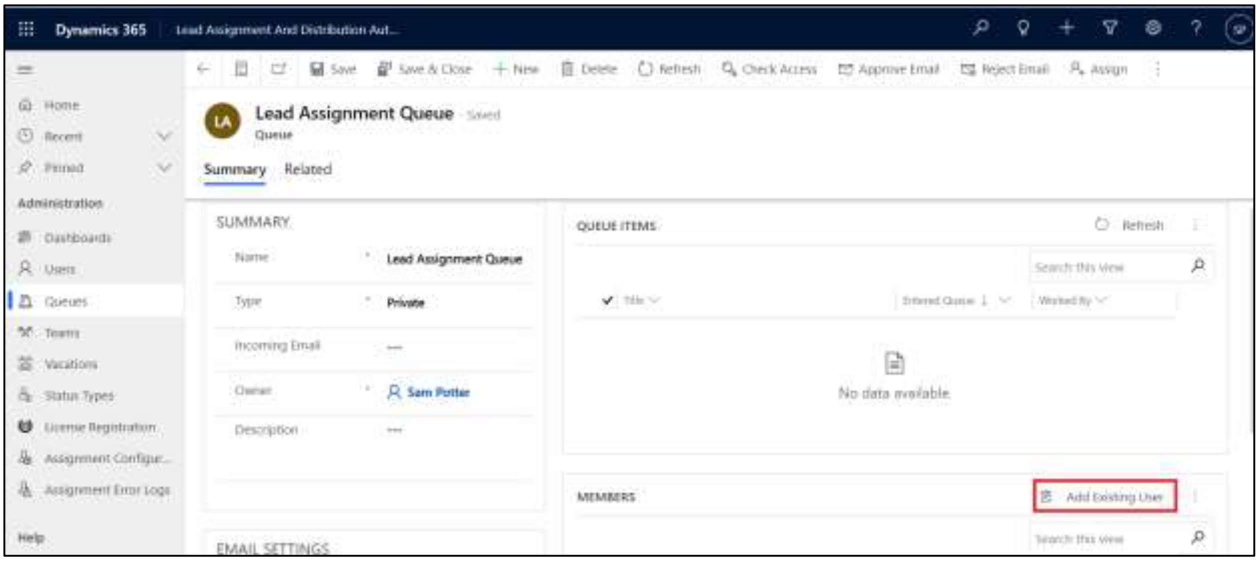
1. Navigate to **Lead Assignment and Distribution Automation App→Administration→Queues**. Click on **'New'**.



2. Enter details into respective fields and click on 'Save'.

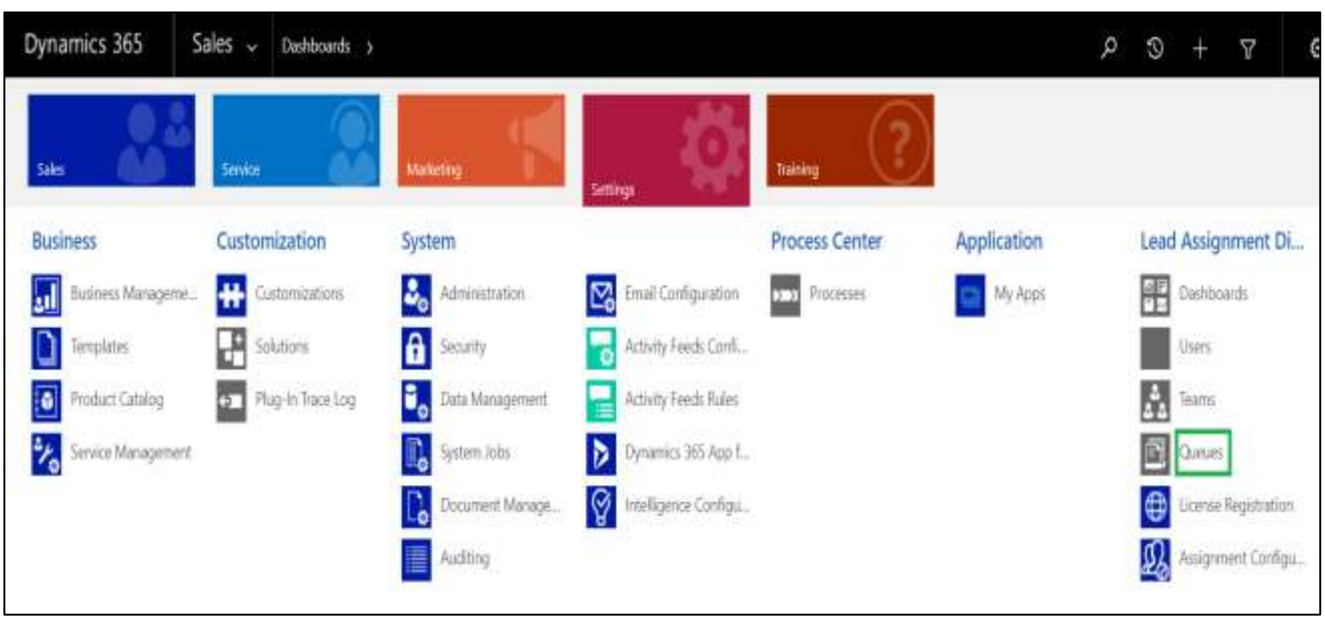
- **Name:** Give name to the Queue. For e.g. Lead
- **Type:** Select **'Private'**, as by default it is set as 'Public'.
- **Description:** Provide description, for e.g. Lead from website.

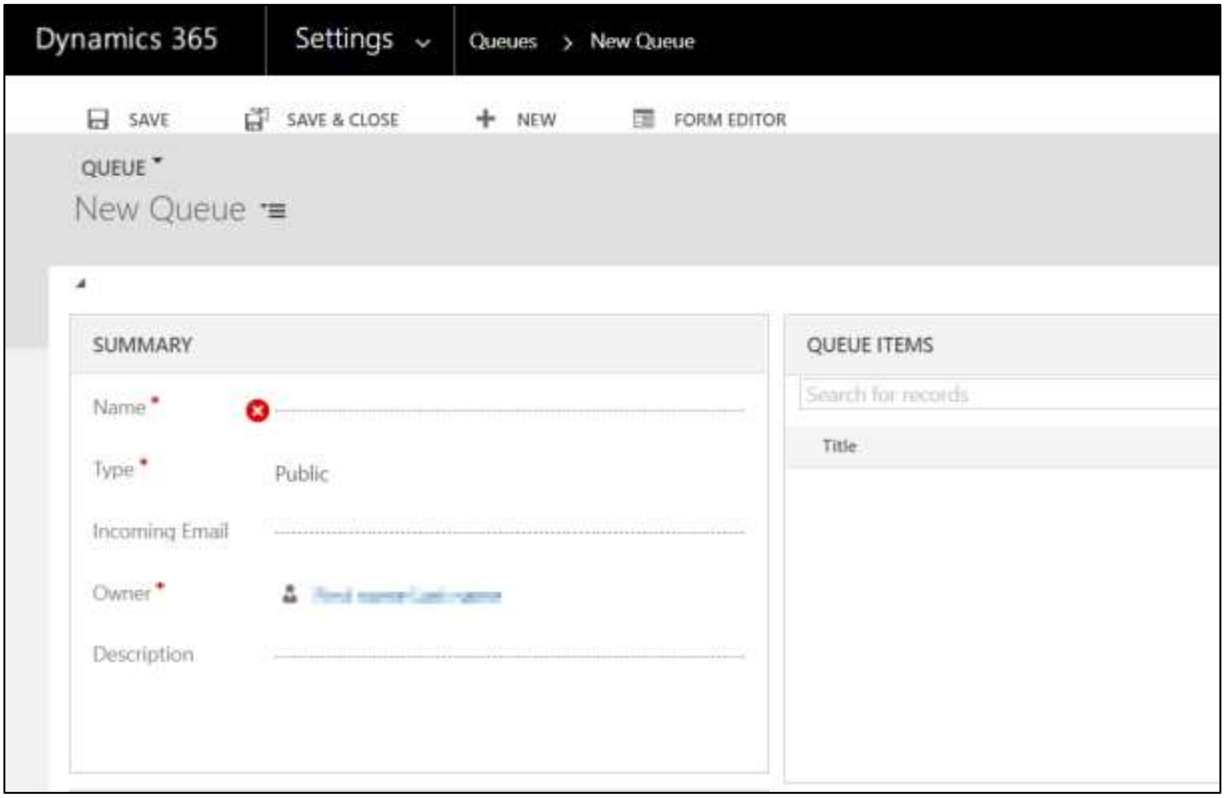
Once it is saved, you can add members to the Queue.



For On-Premises

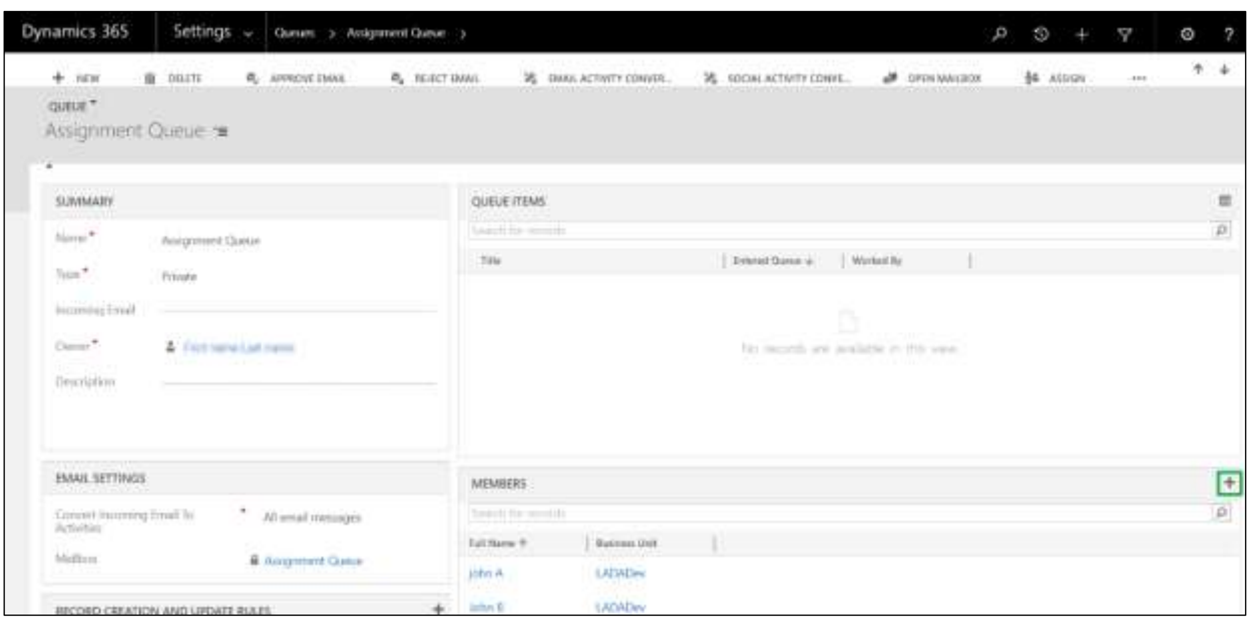
- Navigate to Settings --> Lead Assignment Distribution --> Queues --> Click on 'New'.





- Enter details into respective fields and click on ‘**Save’**.
    - **Name**: Give name to the Queue.
    - **Type**: Select ‘**Private’**, as by default it is set as ‘Public’.
    - **Description**: Provide description.

Once it is saved, you can add members to the Queue.



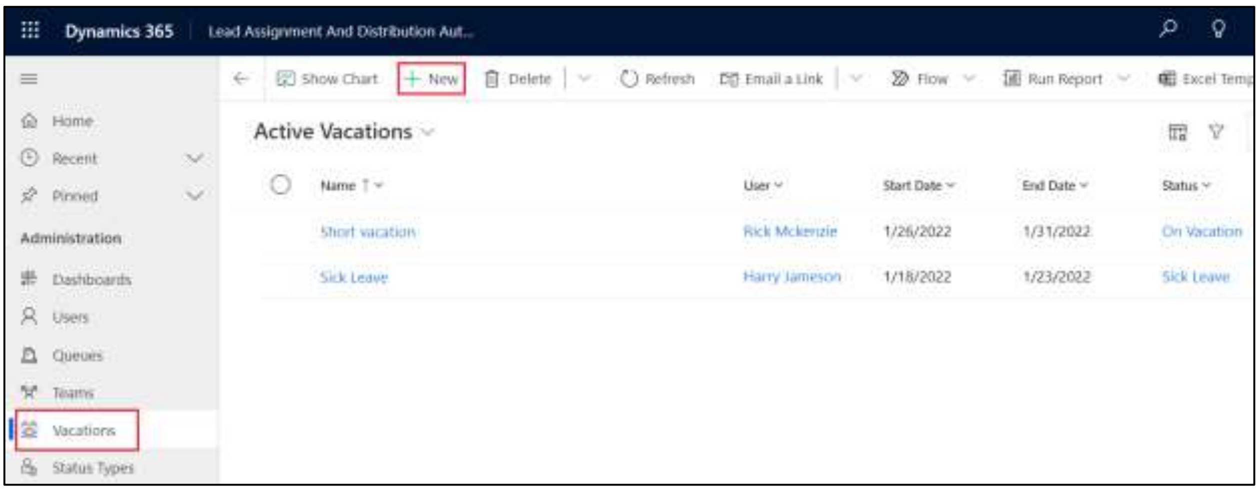
Set up User Availability

Vacations, holidays or sick leaves are part and parcel of the user work life. When such situations arise, where users are not available to work on Leads (other entities), managers has to manually assign the workload of that user to others. With 'Vacation' entity in Lead Assignment and Distribution Automation, managers can set the availability for each user and depending on this Leads (other entities) will be assigned.

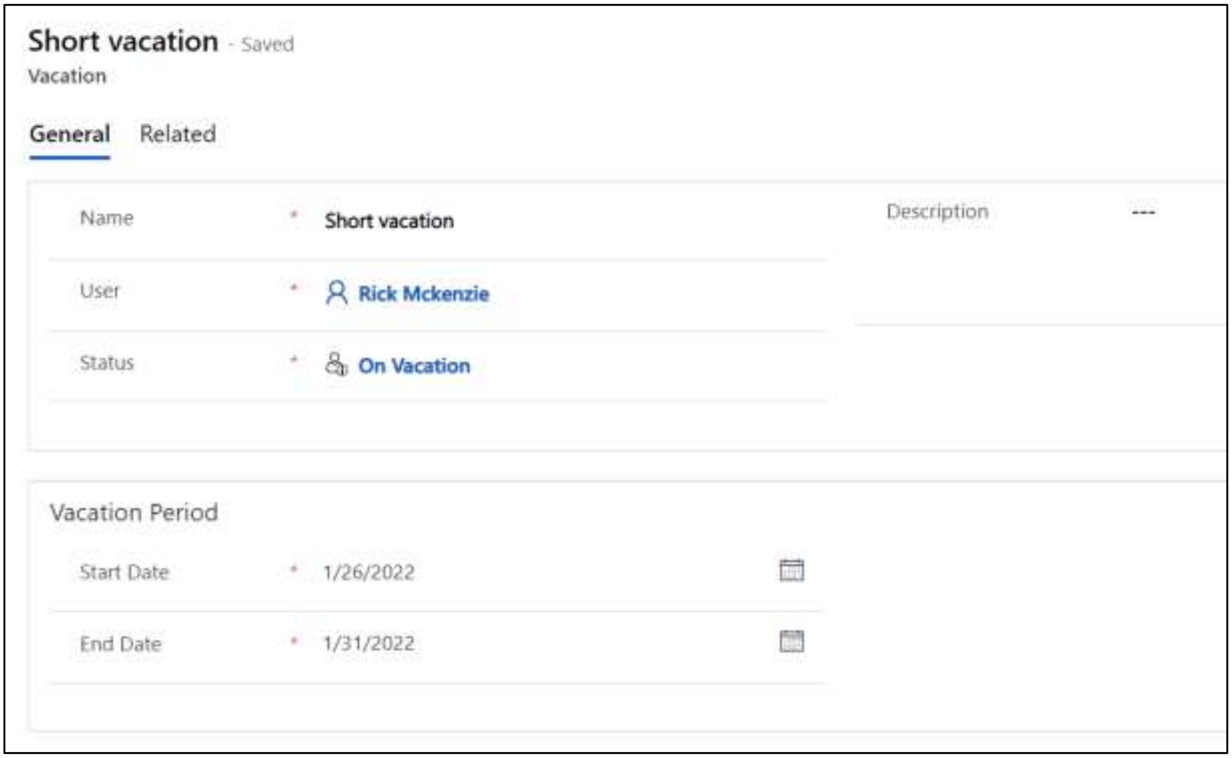
For example, suppose there are three users – Harry, Rick and Sam. If Rick goes on a short vacation after new year, then manager can set the availability of Rick for that particular time period as 'unavailable'. Now the incoming Leads for that period of time will be automatically assigned to Harry and Sam.

To set user availability automatically, follow the steps given below:

1) Navigate to **Lead Assignment and Distribution Automation → Administration → Vacations → Click on 'New'.**



2) Enter the following details and click on **'Save'**.
   a. **Name:** Enter appropriate leave detail. For e.g. Christmas vacation, sick leave, etc.
   b. **User:** Select the user.
   c. **Status:** Select the nature of absence.
   d. **Description:** Provide a short description for the unavailability of the user.
   e. **Vacation Period:** Enter the **'Start date'** and **'End Date'** of the vacation.



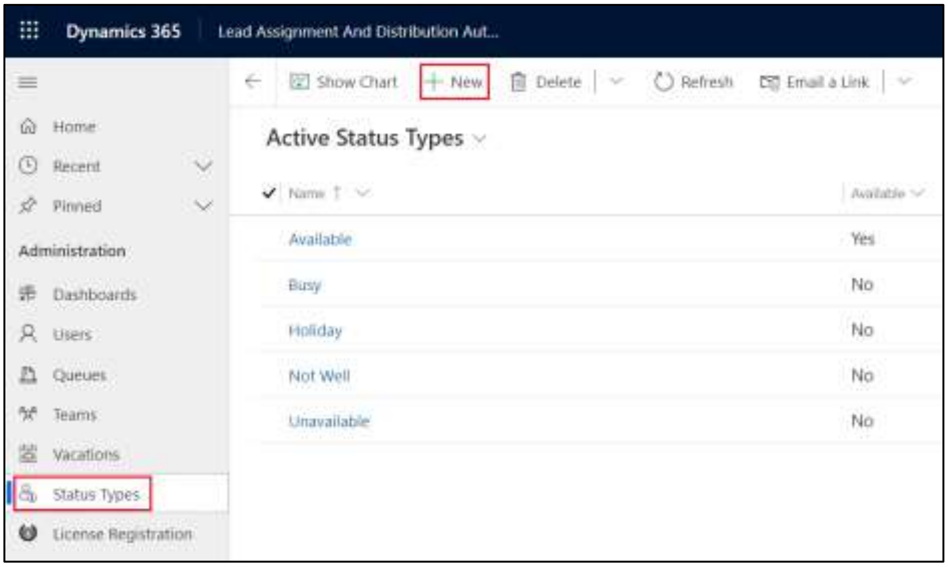
Note:

- ***Vacation records will not be created if the same date is conflicting with another existing record of that particular user. Since there is an already existing record with the same date another records will not be created.***
- ***If any vacation record pertaining to current date (today's date) is activated, deactivated or deleted then the status of the respective user will be duly updated w.r.t that vacation record.***

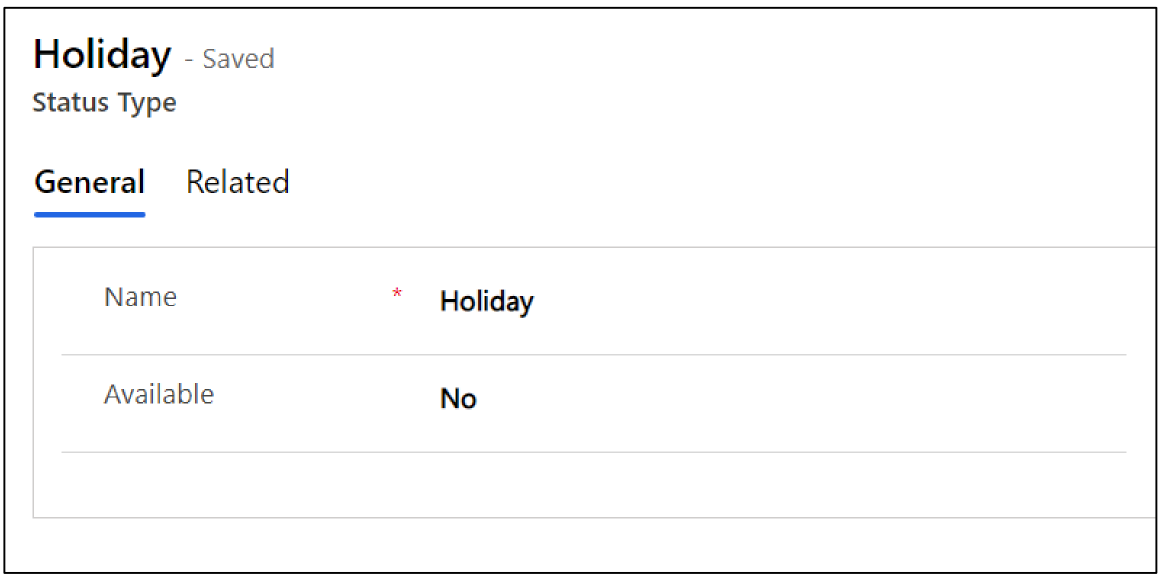
Status Types

By default, this solution offers two status types - **'Available'** and **'Unavailable'** – when the solution is first installed in the CRM. These status types defines the nature of availability of users. To create new 'Status Types' records follow the steps given below:

1) Navigate to **Lead Assignment and Distribution Automation → Administration → Status Types → Click on 'New'.**



2) Give appropriate **name**, select the **availability status** and click on **'Save'**.

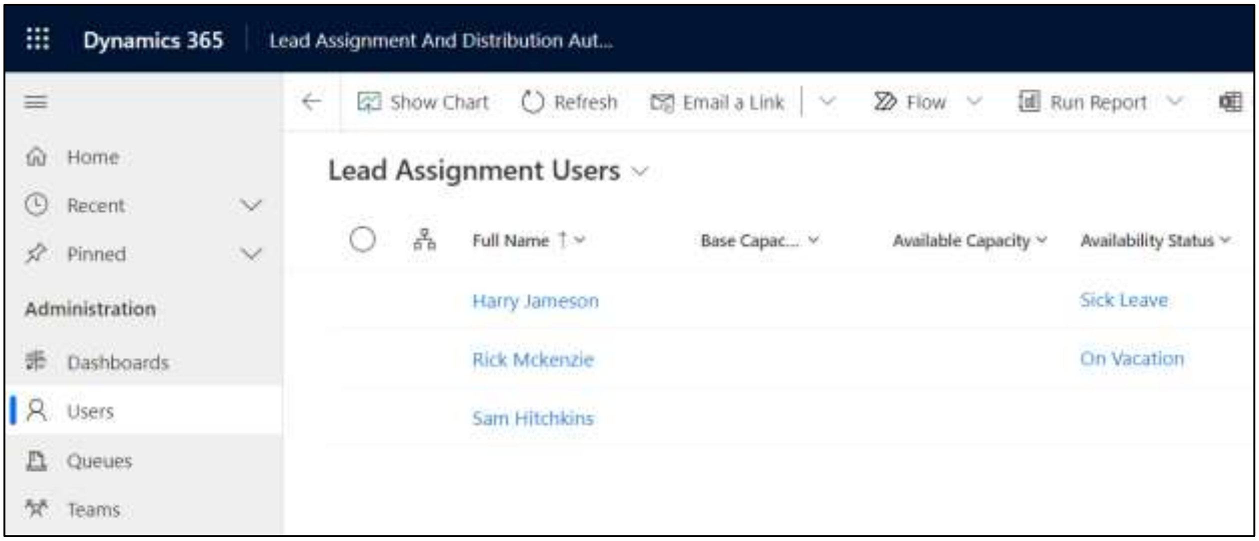


Update User Availability

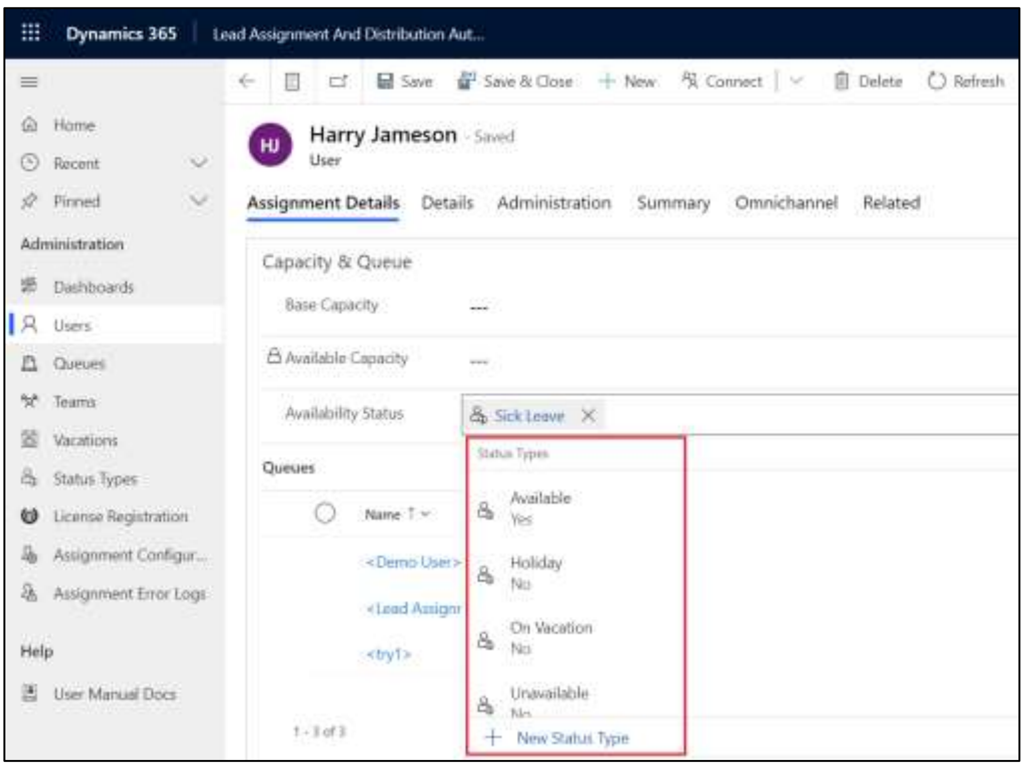
There can be situations where user may take leave and then cancel it. And since the vacation record is already created, it would show the availability status as 'Unavailable' for that particular user. In such situations, the admin or that particular user can manually update the status of availability.

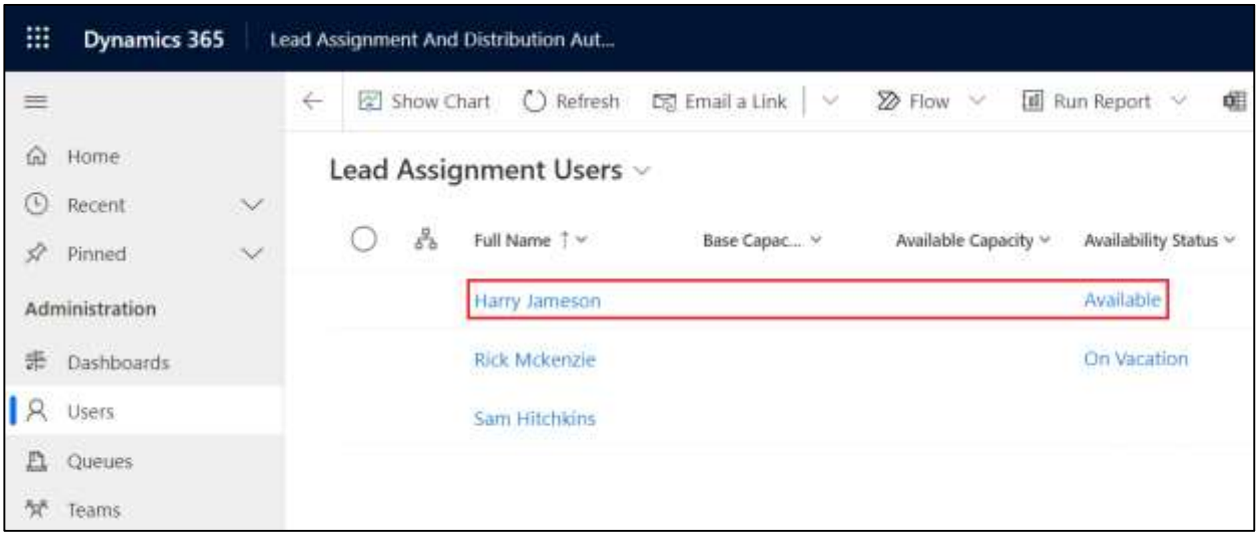
To update availability, follow the steps given below:

1) Navigate to **Lead Assignment and Distribution Automation → Administration → Users.**



2) Select the user → In **'Assignment Details'** update the **Availability** status → Click on **'Save'.**





Assignment Rules

Leads are assigned or distributed based on two methods:

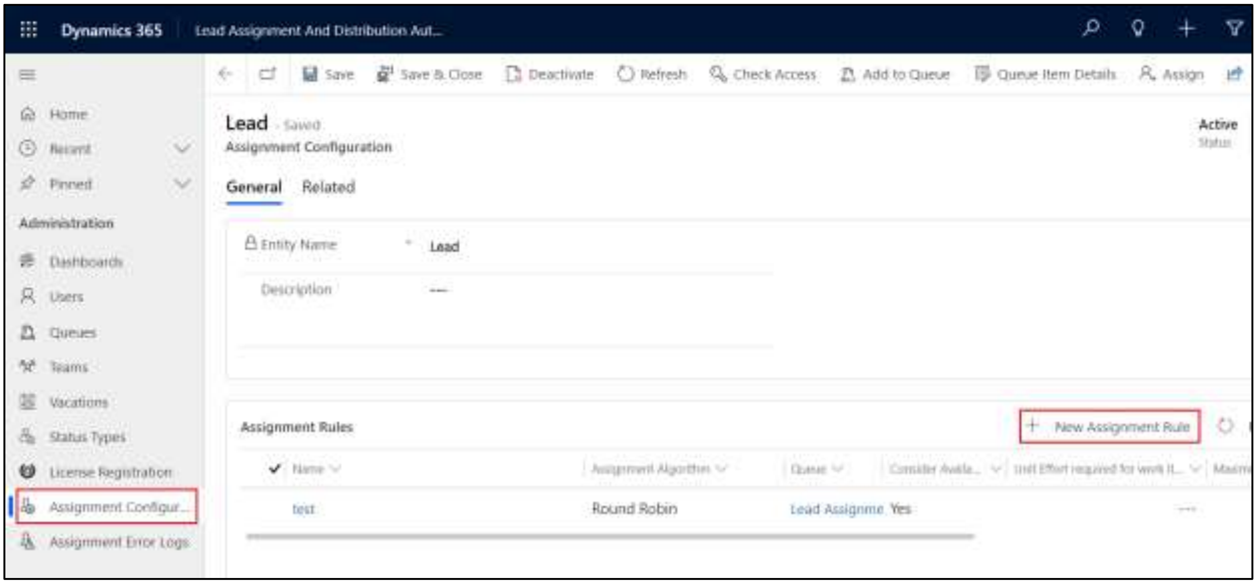
1. **Round Robin**
2. **Capacity**

Round Robin

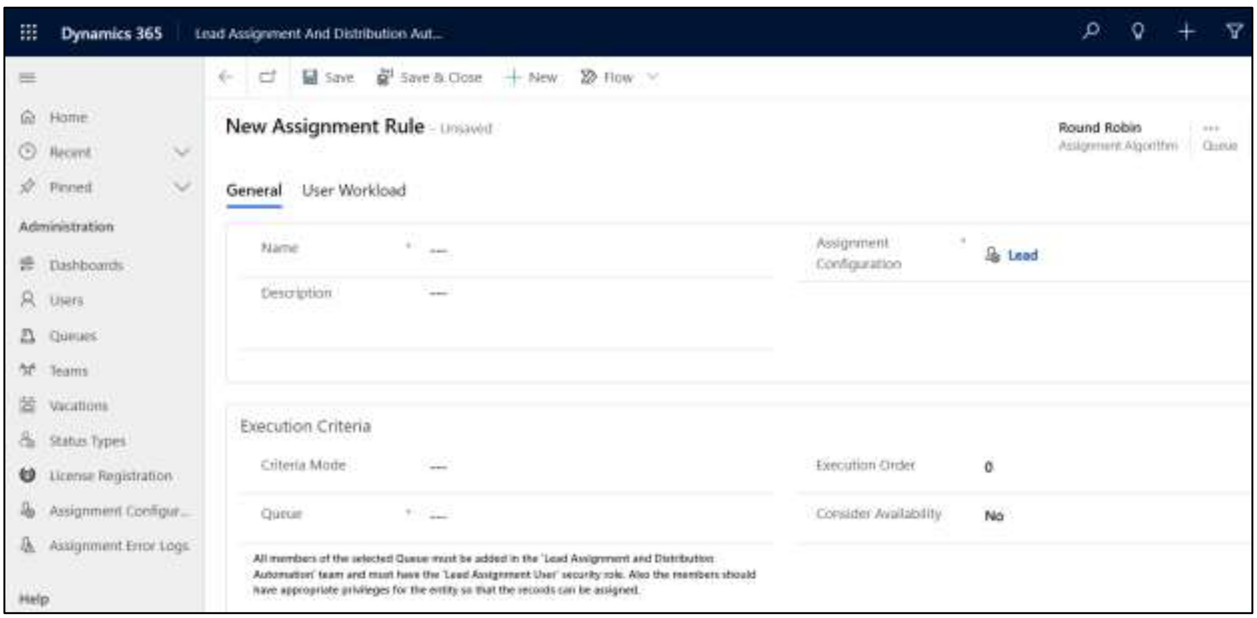
In this method, users are assigned Leads in sequence. For e.g. Consider there are 3 members in a team namely – A, B & C. With Round Robin method, the first Lead will be assigned to A, the second Lead to B, third Lead to C and the fourth Lead will be again assigned to A. In this sequence Leads will be assigned to the users.

To assign Leads as per Round Robin method, follow the steps given below:

a) Navigate to **Lead Assignment and Distribution Automation App→Administration→Assignment Configuration→Select the respective Assignment Configuration→ Click on New Assignment Rule**.

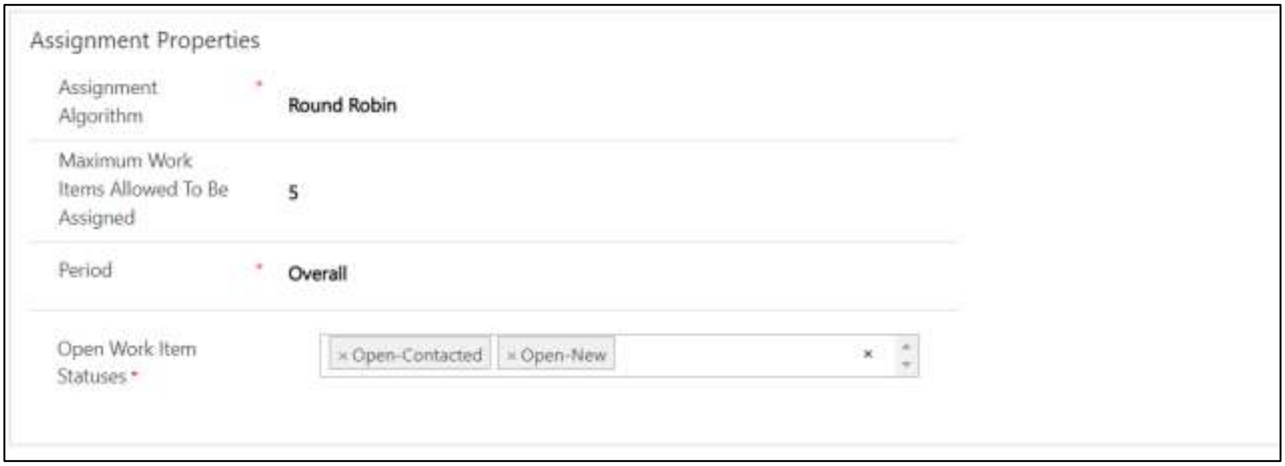


b) Enter mandatory field details as illustrated below and click on **'Save'**.



- **Name:** Give name, for e.g. Leads from Website
- **Assignment Configuration:** Select respective configured Entity, for e.g. Lead.
- **Description:** Provide description, for e.g. Leads from Website.
- **Criteria Mode:** Select between 'Simple' or 'Advanced' criteria mode. 'Simple' mode is based on 'Views' and 'Advanced' is based on Fetch Xml. Here, Advanced mode is selected.
- **Execution Order**: Give numeric value, for e.g. 0. If there are two or more Round Robin based Assignment Rules then this field states the order in which Rules are to be executed while assigning Leads.

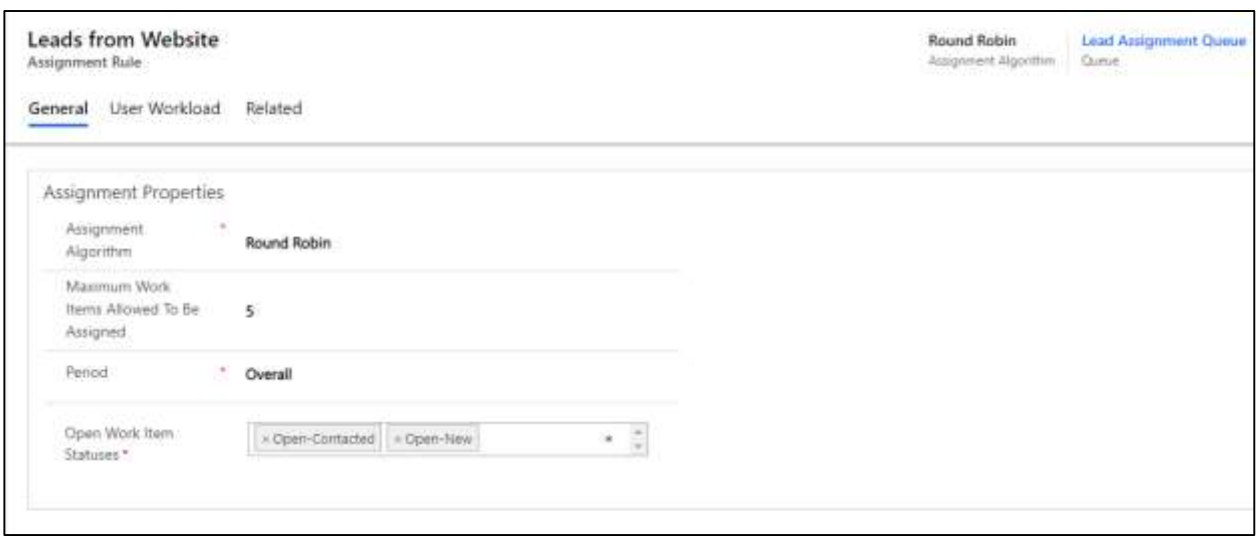
- **Queue:** Select the respective Queue.
- **Consider Availability:** This field checks the availability status of users before assigning work items. Select ‘Yes’ or ‘No’.
- **Assignment Algorithm:** Select between Round Robin and Capacity. Here we selected Round Robin.
- **Max Work Items Allowed to be Assigned:** This field denotes the maximum number of work items that is allowed to be assigned to users. For example – 5. Here, each user will be assigned maximum 5 Leads.
- **Period:** This is an option-set field with the following options - Daily, Weekly, Monthly and Overall. It defines the period for which the work items (Entity records) will be assigned to the users.
- **Open Work Item Statuses:** Select the status from the dropdown, for e.g. Open-New. Here, based on the status ‘Open-New’ Leads will be assigned to users. Once the Lead ‘s status changes from Open-New to another status then then that Lead will be considered as completed and automatically another Lead with status as ‘Open-New’ is assigned to the same user. This process will go on till all the Leads are assigned.



Set period for assigning work items

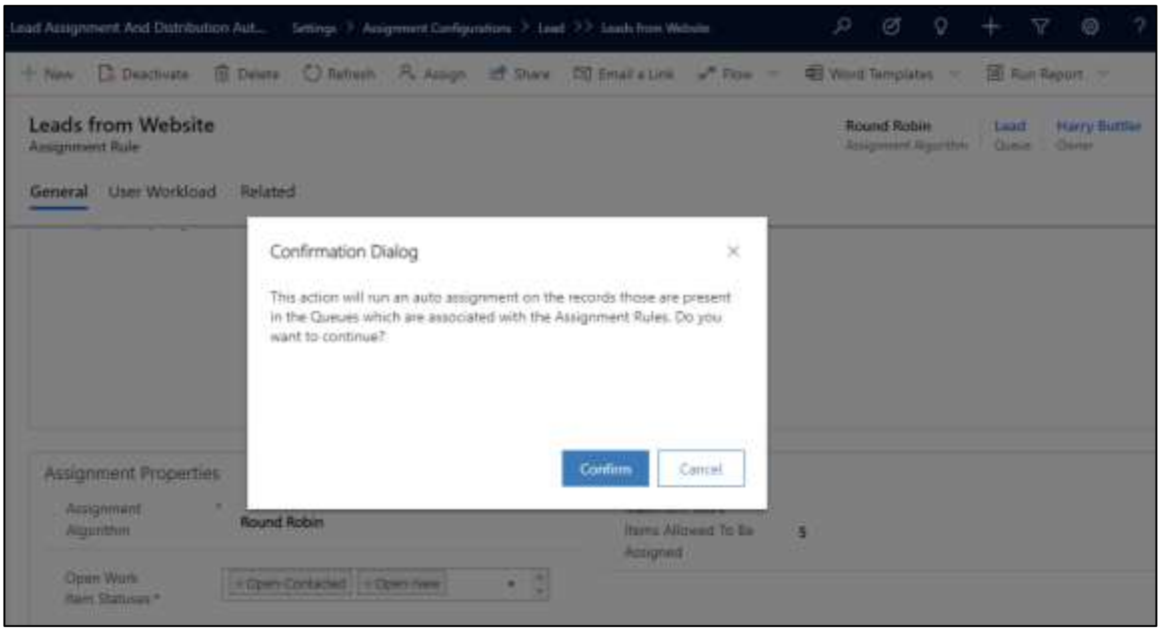
The 'Period' field in the assignment rule defines the period for which entity records (work items) will be assigned to users. It has the following options -

- **Daily:** The work items will be assigned on a daily basis.
- **Weekly:** The work items will be assigned on weekly basis.
- **Monthly:** The work items will be assigned on monthly basis.
- **Overall:** Since there is no definite period as such, work items will be assigned as per the standard assingment rule. When this option is selected, 'Open Work Item Statuses' field will be made available to be populated.



Updation of 'Max Work Items Allowed to be Assigned' field

It is quite easy to update the maximum number of work items allowed to be assigned to the users. Just go to the existing 'Assignment Rule' and enter new value in the **'Max Work Items Allowed to be Assigned'** field. Once the new value is entered, a dialog box will appear asking for confirmation. Click on **'Confirm'** tab to update the new value. Now, records that are present in the Queues which are associated with the Assignment Rule will be auto assigned to the users as per the updated value.

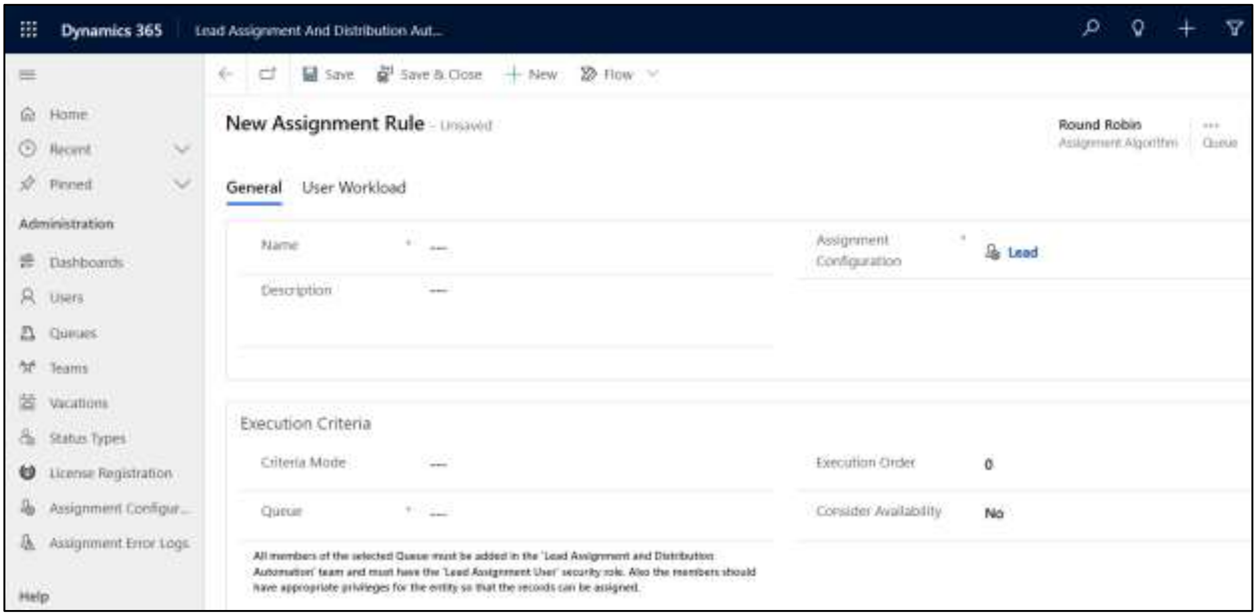


Capacity

Leads are assigned on the basis of user capacity. Each user is assigned a base capacity by the manager. For e.g. Let's consider that 1 Lead is equivalent to 5 units. Based on this A is given capacity of 5 units, B is given capacity of 10 units and C is given capacity of 12 units. As Lead comes it is systematically assigned to A, B and C. Now depending on capacity A has zero units left whereas B has 5 units and C has 7 units left. This is automatically highlighted in the 'Available Capacity' field of each user. So, the next Lead will be assigned to B and then C. The 'Available Capacity' field is auto-populated as per available capacity of user. Here, if A closes the Lead then the 'Available Capacity' field will auto-populate and display 5 units against A. Now, A is eligible to be assigned incoming Leads. In this way, on the basis of available user capacity Leads will be assigned to each user.

Now to assign Leads on the basis of User Capacity follow the steps given below:

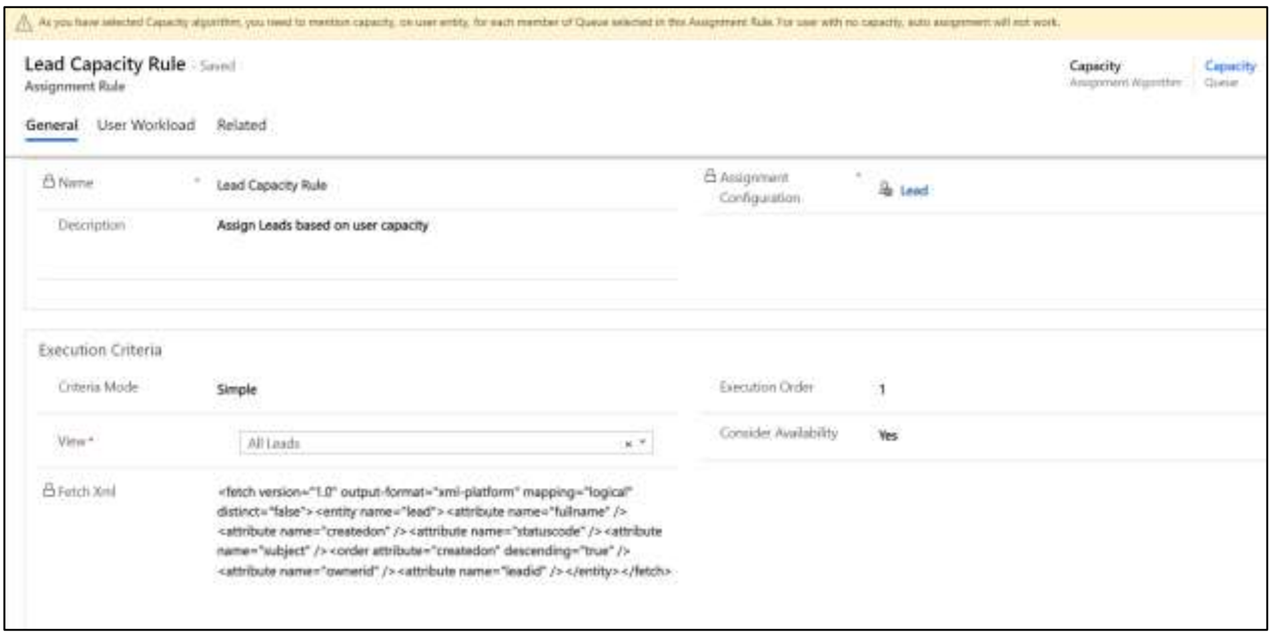
a) Navigate to **Lead Assignment and Distribution Automation App→Administration→Assignment Configuration→ Select the respective Assignment Configuration → Click on New Assignment Rule.**

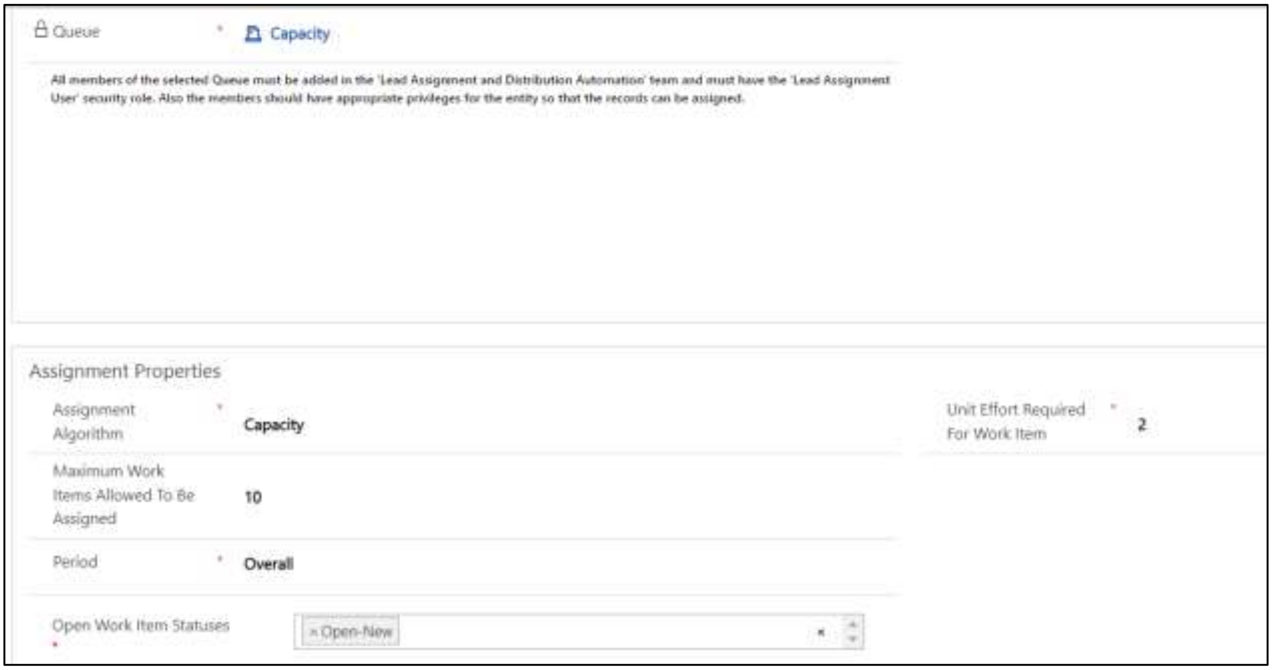


b) Enter the mandatory details and click on 'Save'.

- **Name:** Give name to the Assignment Rule.
- **Assignment Configuration:** This field is auto-populated.
- **Description:** Provide description.
- **Criteria Mode:** Select between 'Simple' or 'Advanced' criteria mode. 'Simple' mode is based on 'Views' and 'Advanced' is based on Fetch Xml. Here, Simple mode is selected.
- **Execution Order:** Give numeric value, for example - 1. If there are two or more Round Robin based Assignment Rules then this field states the order in which Rules are to be executed while assigning Leads.
- **Queue:** Select the respective Queue.
- **Consider Availabiltiy:** This field checks the availabilty status of users before assigning work items. Select 'Yes' or 'No'.
- **Assignment Algorithm:** Select between Round Robin and User Capacity. Here we selected Capacity. Once the field is populated another field – Unit Effort Required For Work Item – becomes visible.
- **Unit Effort Required For Work Item:** Define the units required for per work item. For example: 1 Lead = 2 units.
- **Max Work Items Allowed to be Assigned:** This field denotes the maximum number of work items that is allowed to be assigned to users. For example – 10. Here, each user will be assigned maximum 5 Leads.
- **Period:** This is an option-set field with the following options - Daily, Weekly, Monthly and Overall. It defines the period for which assignment rule will be run checking for incoming work items (Entity records) and assigning it to the users defined in the assignment rule.
    - Daily: The assignment rule will be triggered daily assigning work items to users as per their capacity.

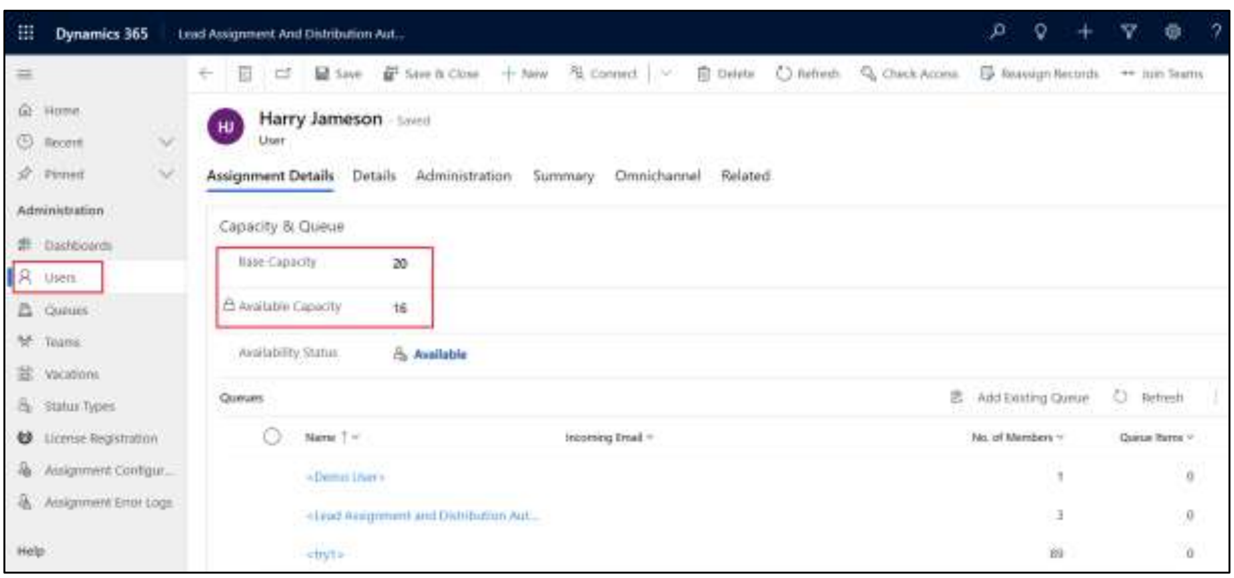
    - Weekly: The assignment rule will be triggered weekly assigning work items to users as per their capacity.
    - Monthly: The assignment rule will be triggered monthly assigning work items to users as per their capacity.
    - Overall: The assignment rule will be triggered as and when user closes the Lead or completes the task and updates the status of the work item.
- **Open Work Item Statuses:** Select the status from the dropdown, for e.g. Open-New. Here, based on the status ‘Open-New’ Leads will be assigned to users. Once the Lead’s status changes from Open-New to another status then that Lead will be considered as completed and automatically another Lead with status as ‘Open-New’ is assigned to the same user. This process will go on till all the Leads are assigned.

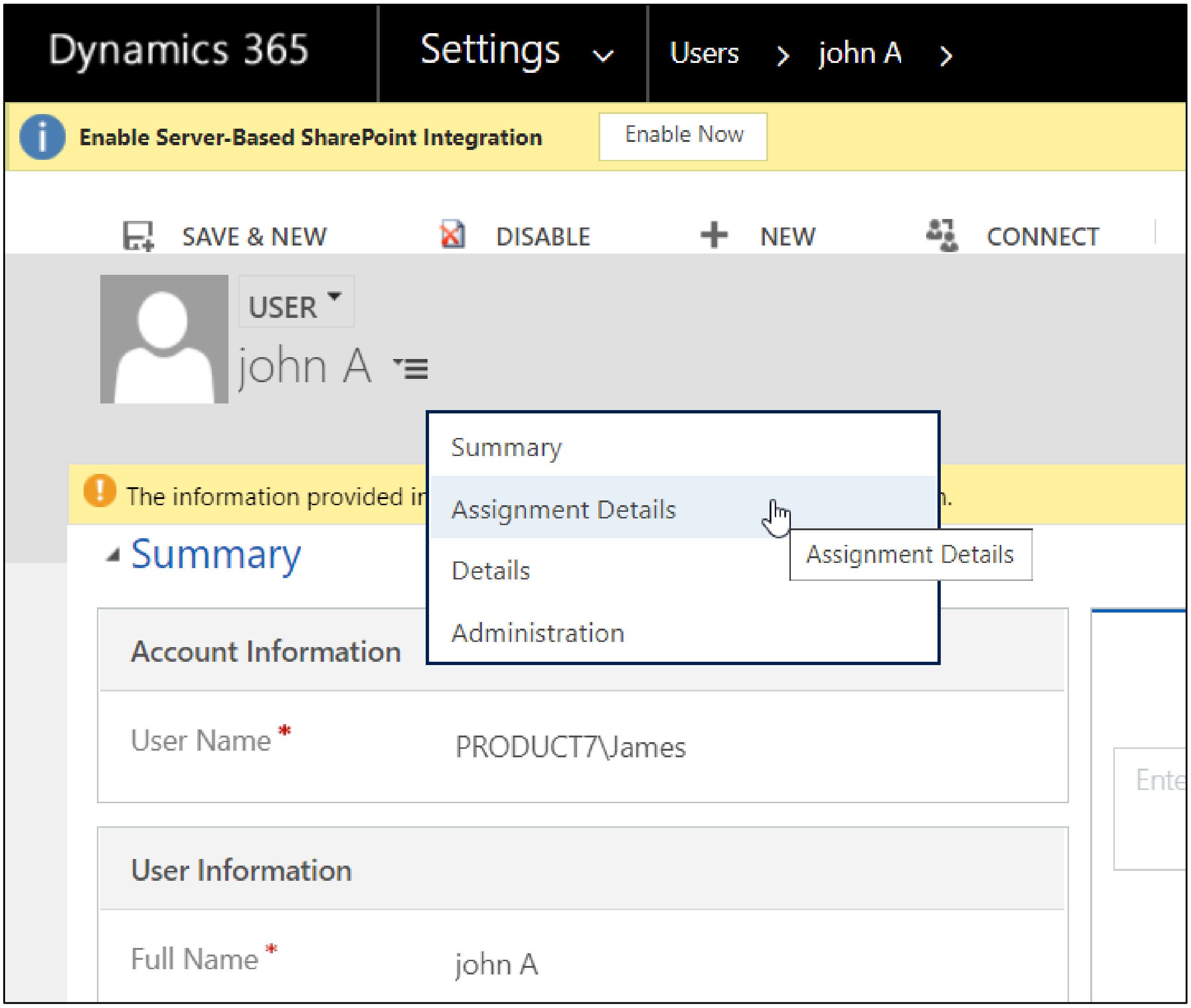




c) To specify user capacity, **go to Lead Assignment and Distribution Automation App→ Administration→Users→Lead Assignment Users→Select User→Assignment Details→Populate Base Capacity field→Click on 'Save'**.

Note: *For On-Premises, you will have to use Classic way to specify user capacity as UCI will be read only. For classic way, follow the steps given below.*




Dynamics 365
Settings
Users
john A
Enable Server-Based SharePoint Integration
Enable Now
SAVE & NEW
DISABLE
NEW
CONNECT
USER
john A
Summary
Assignment Details
Details
Administration
Assignment Details
The information provided i
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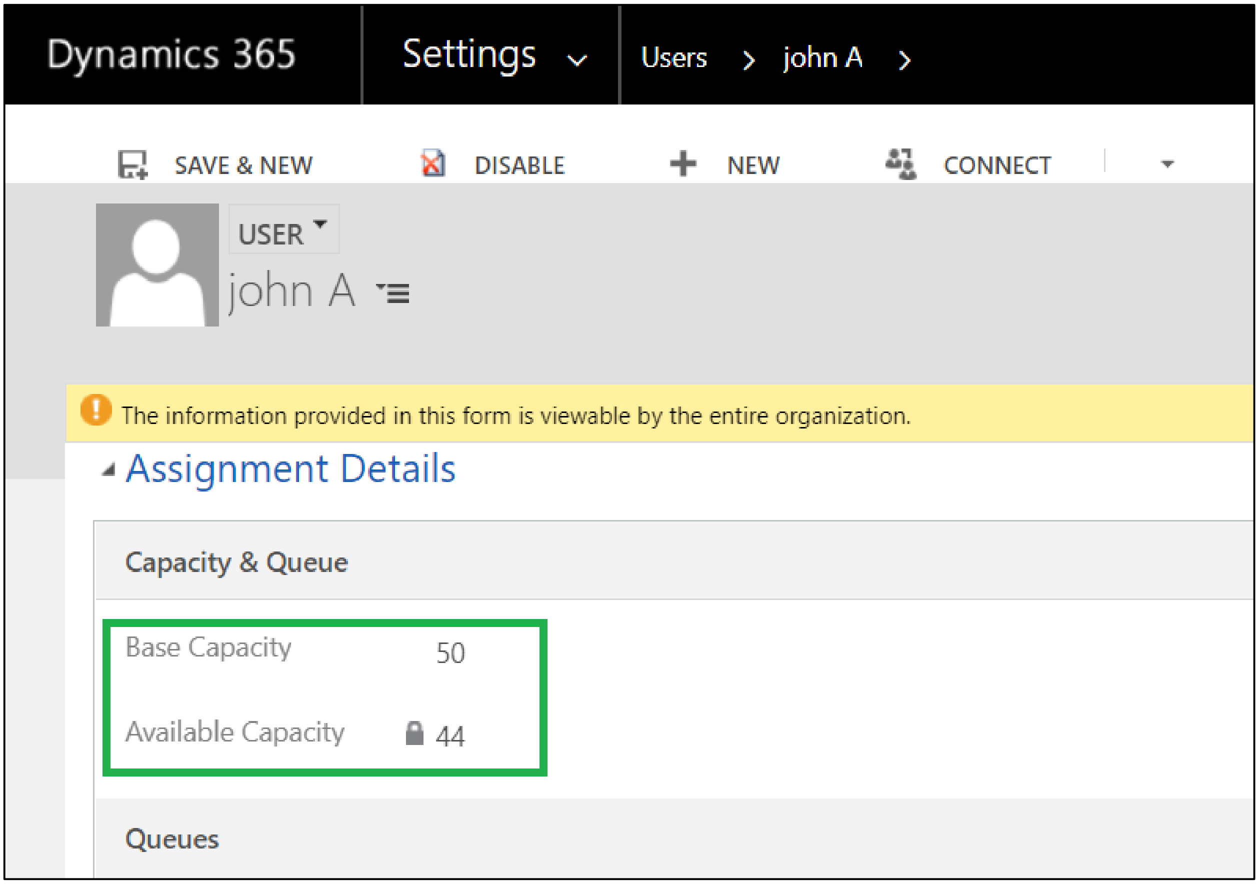
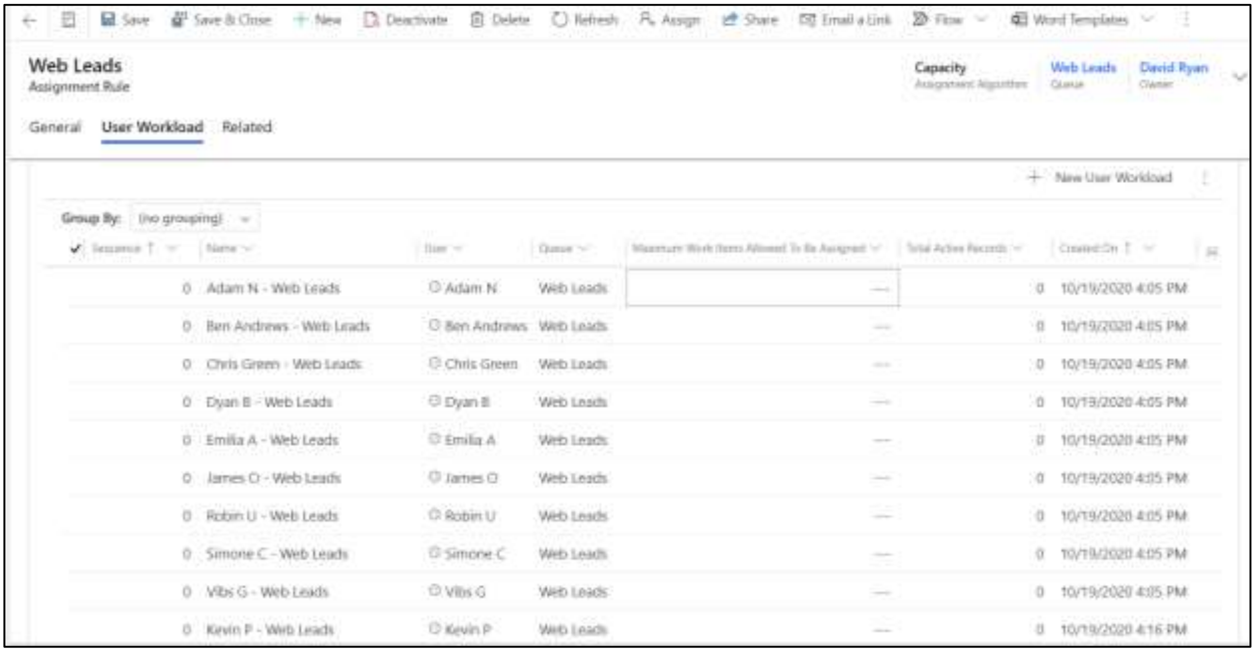
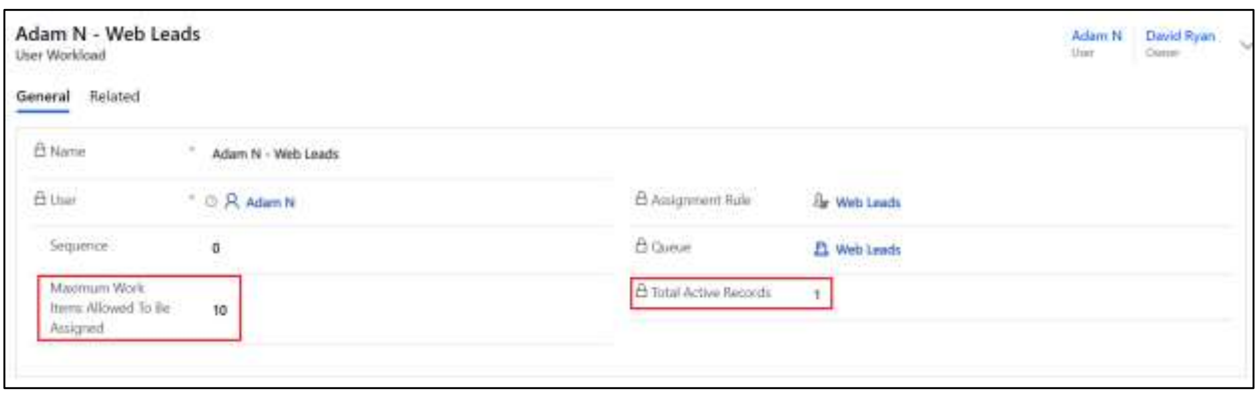
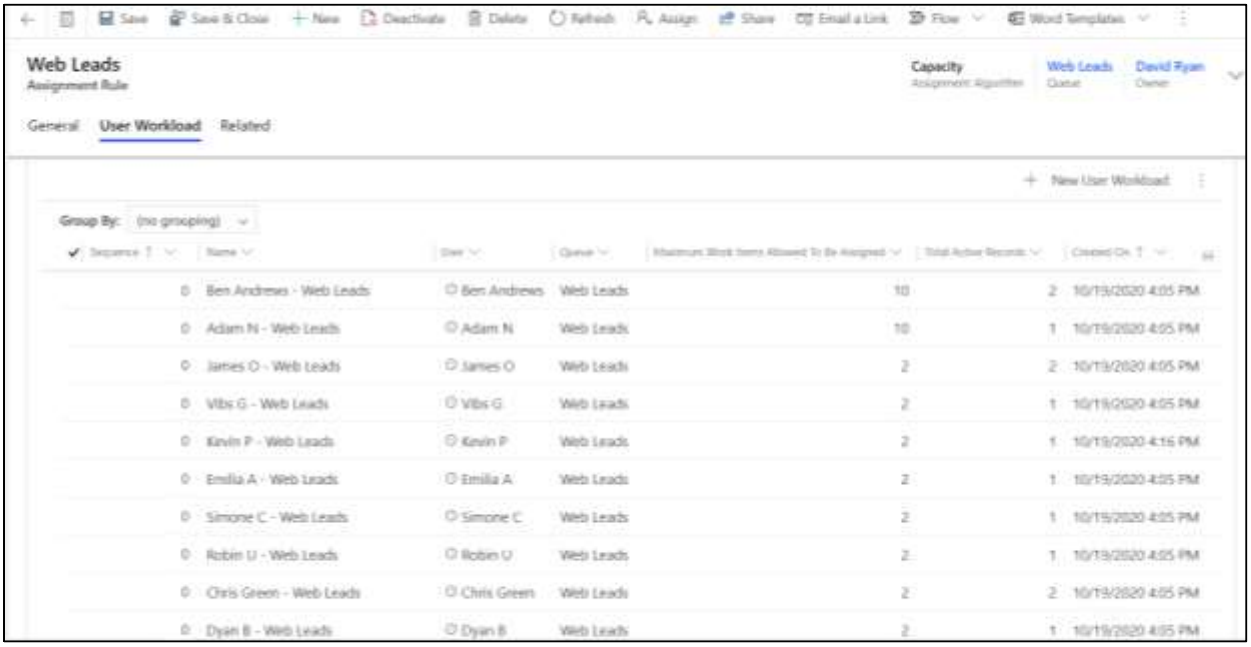


d) Next go to second tab – **User Workload**. Every individual user has their own capacity and has their priority to work on new items. A senior member can work on more items than a junior member. User Workload is used to handle such cases. The User workload records get created when "Assignment Rule" records get created and when new member is added in the queue (which is set on the Assignment Rule).



e) Click on any one user and get detailed workload information about that particular user. It gives you information about the total number of active records owned by the user in CRM. Further, you can also update the maximum records assigned to user.



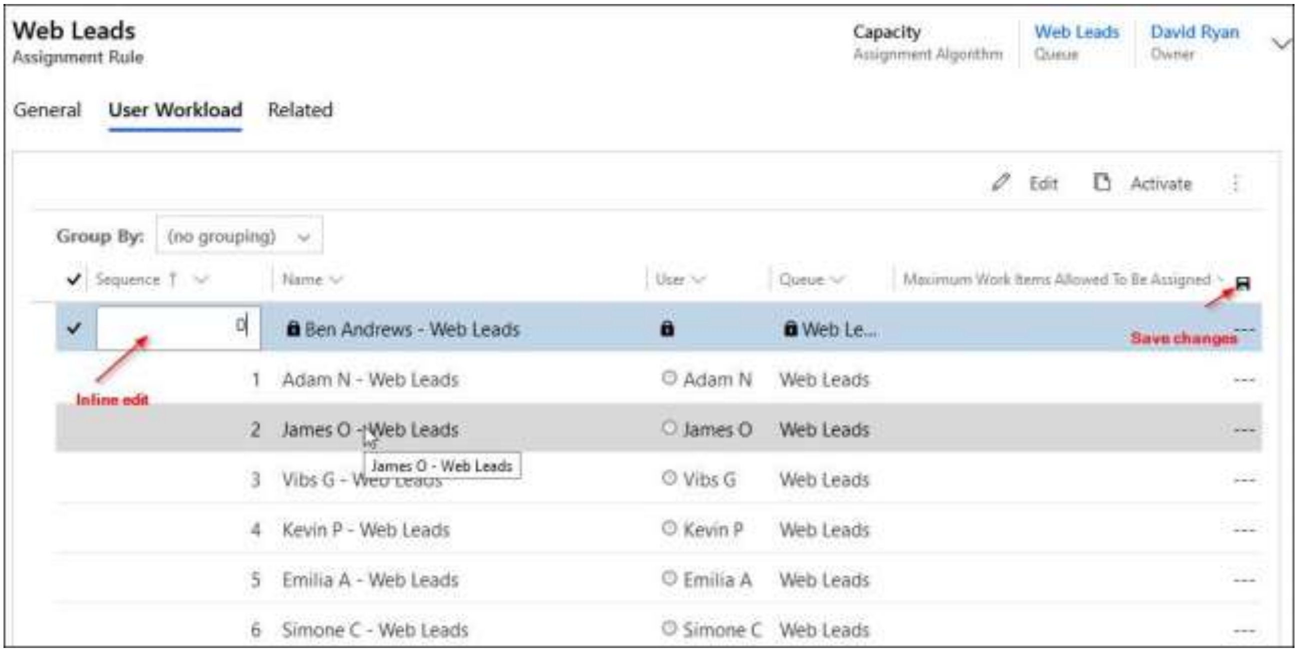


Set the sequence of the users that the records are assigned

The “Sequence” field in the “User Workload” entity field is used for deciding the sequence of the users. This Sequence field is a numeric field and starts with 0.

Only **Lead Assignment Administrator** or **System Administrator** can change the sequence of the user.

An administrator can directly change the sequence from the sub-grid and would not need to open each record to change the sequence.



The records will get assign from lowest to highest sequence and will work with both Round Robin and Capacity algorithm.

By default all users will have 0 sequence. If no sequence is provided then the records will get assigned by date when the user workload is created (i.e. date when a user added in the queue).

You cannot add duplicate sequence number for two or more users. It will restrict the user from adding same sequence number for the users.

Automatic assignments on update

By default this solution assigns rercord to the users as soon as the record gets created in the system. Automatic assignment works only on create of the record.

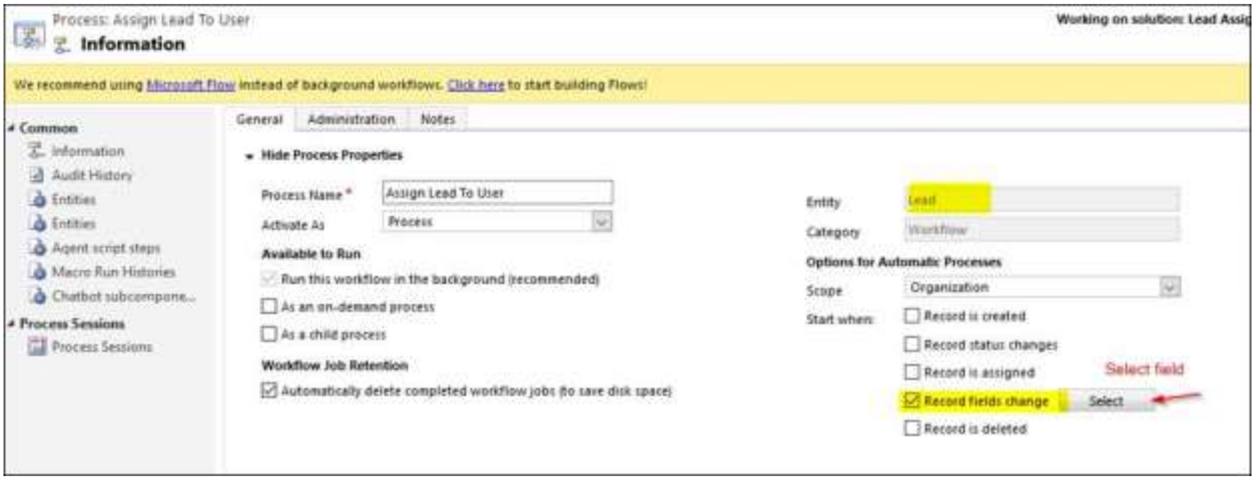
Now there could arise a situation where we may want to assign the record if some specific changes occur in the record. For example, you want to assign Lead record with status reason as **'Not Ready'** to one set of users and when status reason changes to **'Ready'** you want to assign the same record to some other set of users.

To enable automatic assignment on update of the record, you would need to make use of Inogic's action called '**Inogic.AddItemsToQueue**' action. This action first adds the work items to appropriate queue and then assigns the record to the user.

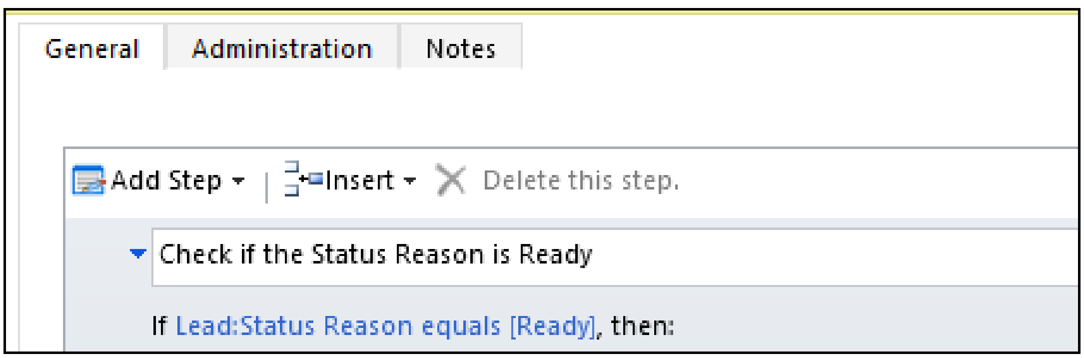
To enable automatic assignments on the update, follow the steps given below:

Using classic workflow:

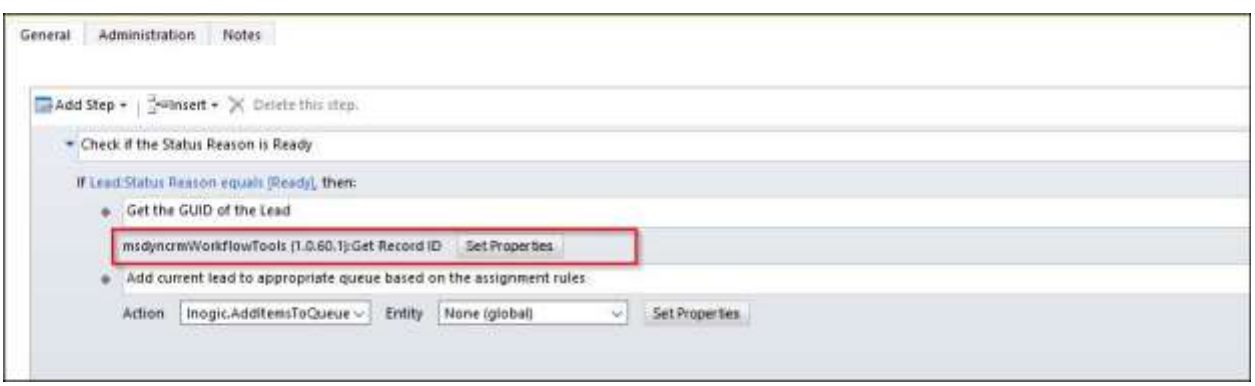
- Create a workflow that will trigger on change of the field (e.g. Status Reason).



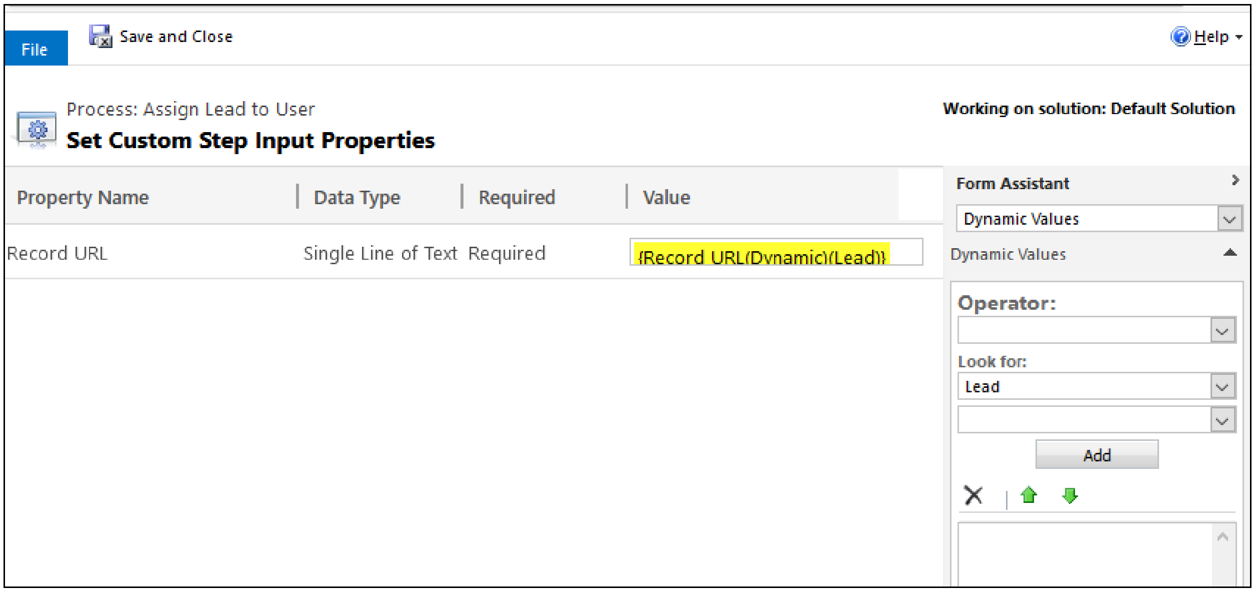
- If required add condition to check and run assignment only if your criteria meets. For the demo purposed, we had used condition to check if Status Reason is Ready.



- **Get the GUID of the record:** Add workflow assembly to get the GUID of the current record. Download and install [Dynamics 365 Workflow Tools Solution 1.0.60.1]() managed solution in your environment.
  This managed solution provides assembly called **'msdyncrmWorkflowTools: Get Record ID'** to get the GUID of the record.

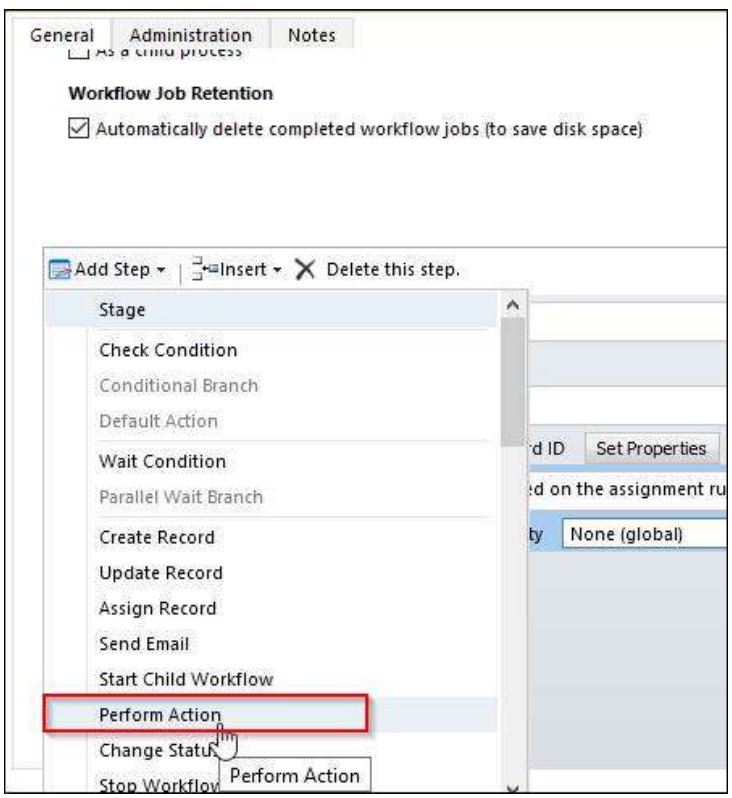


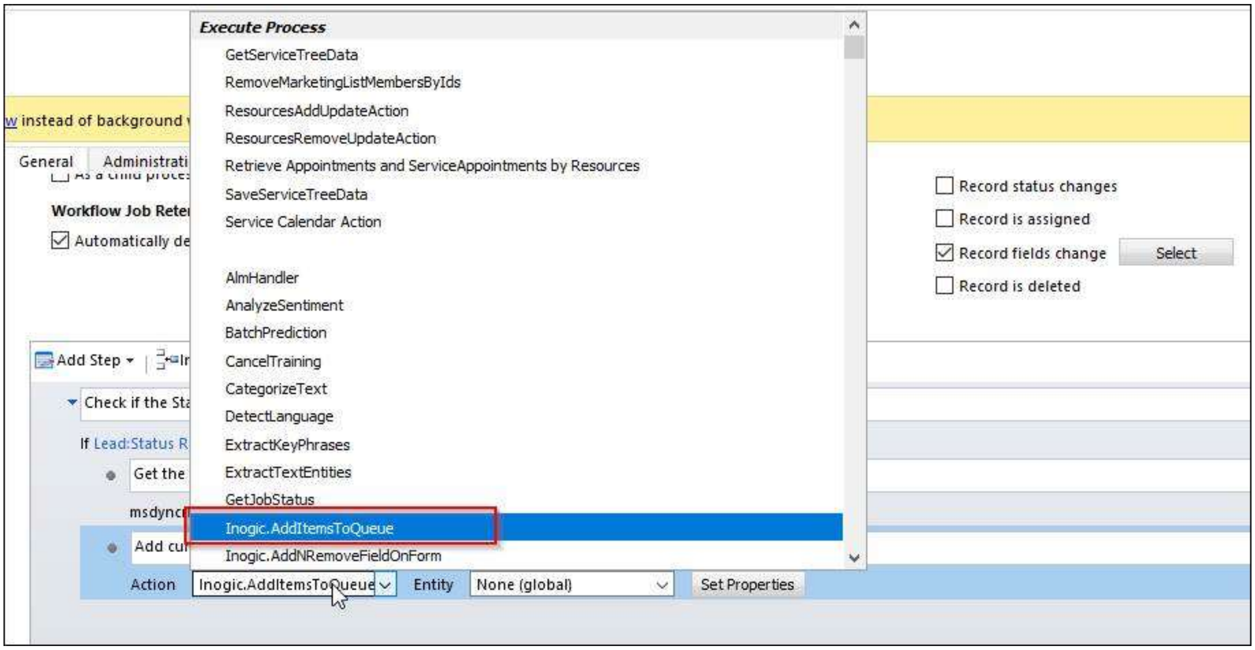
You would need to pass the Record URL from current lead to Record URL parameter.



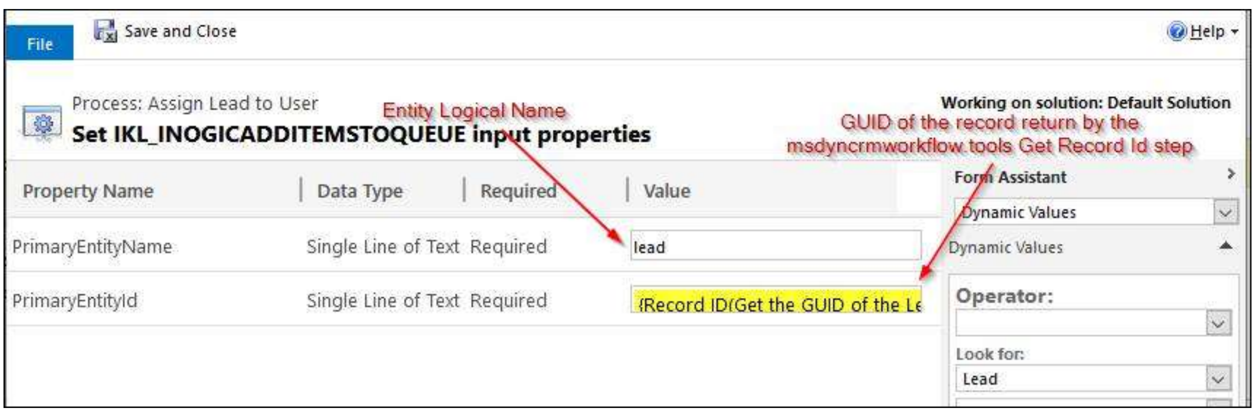
This step will return the GUID of the current lead record.

- Call '**Inogic.AddItemsToQueue**' action of Inogic. Add **'Perform Action'** step and select '**Inogic.AddItemsToQueue**' action. This action is already available in the Round Robin Routing and Assign solution.



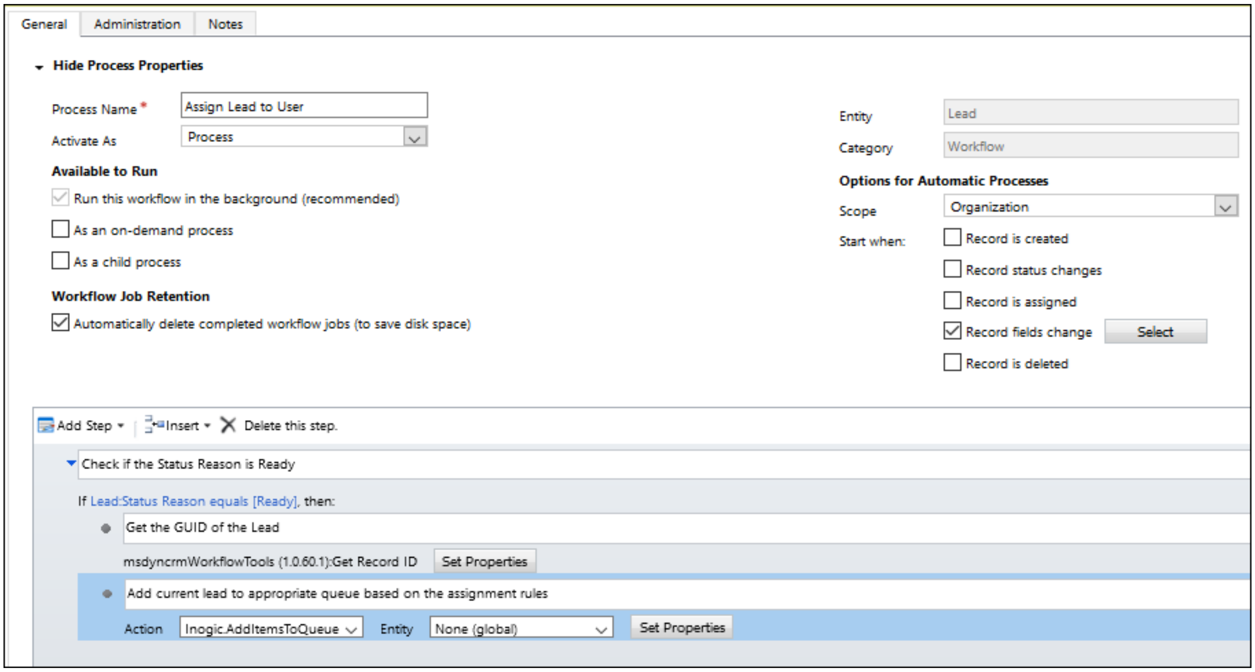


- Pass **PrimaryEntityName** and **PriamryEntityID** as Logical name of the entity e.g. lead, incident etc. and 'GUID of the record return by the msdyncrmworkflow tools step' respectively. This action will perform automatic assignment based on the Assignment Rules.



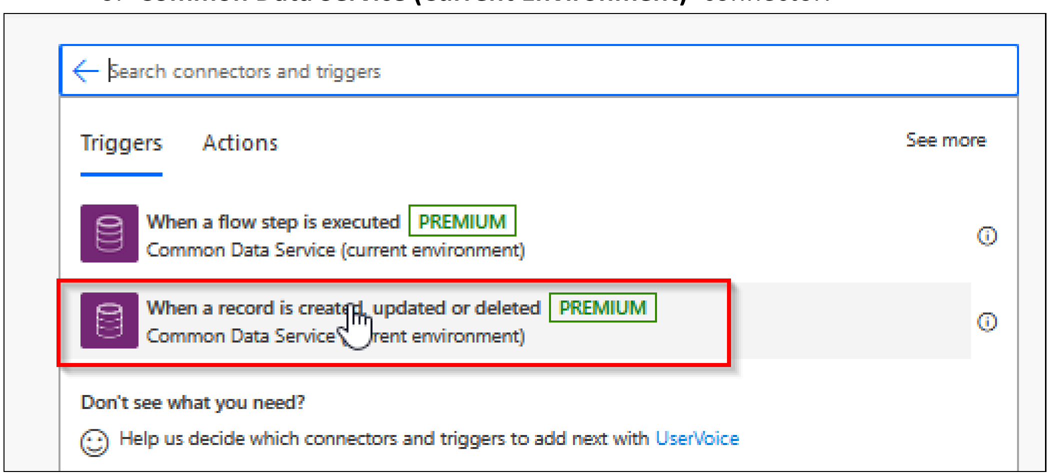
This action will perform automatic assignment based on the Assignment Rules.

- **Save and Activate** the workflow. The final workflow will look as below:

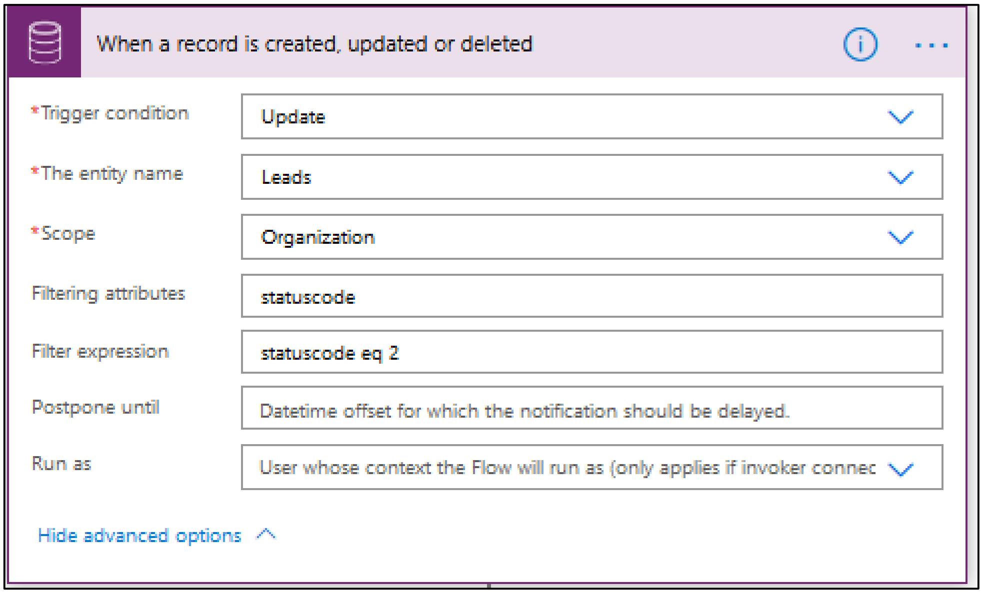


Using Power Automate Flow:

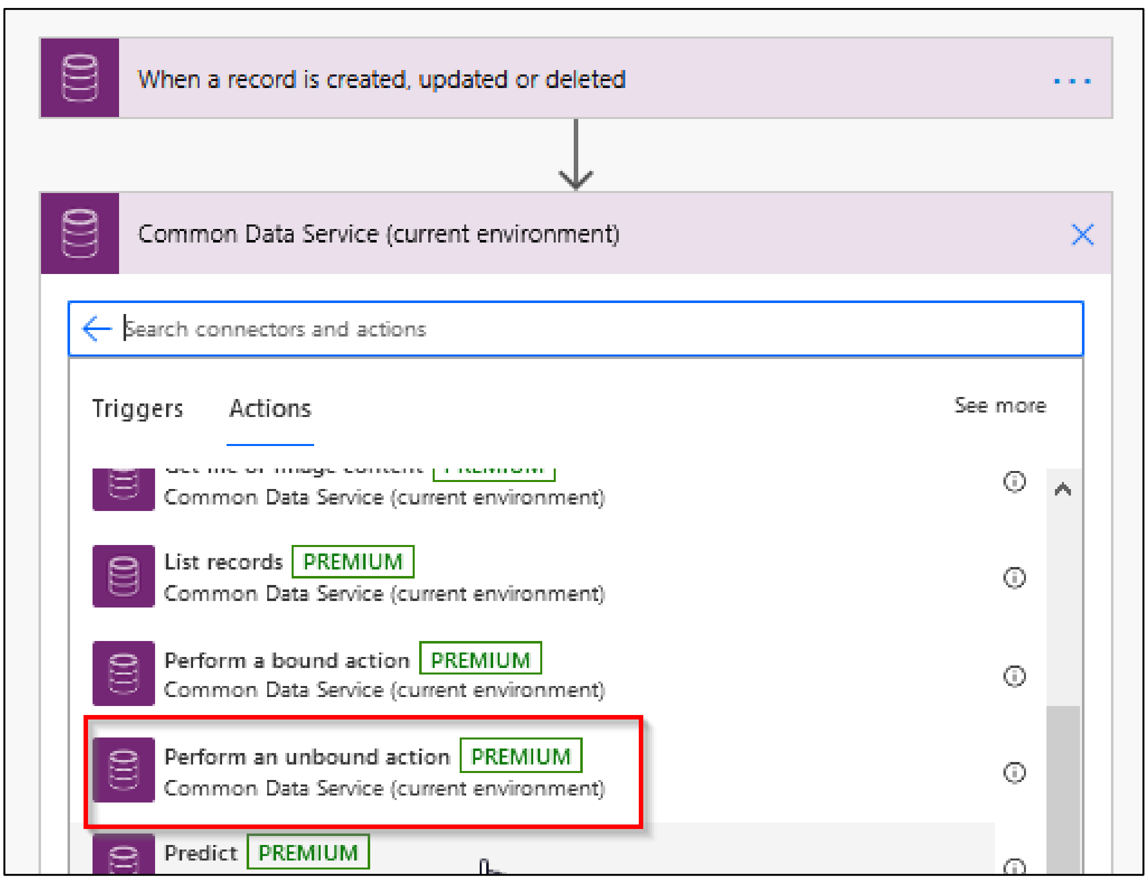
- Create a new Power Automate Flow and add **'When a record is created, updated or deleted'** step of **'Common Data Service (Current Environment)'** connector.



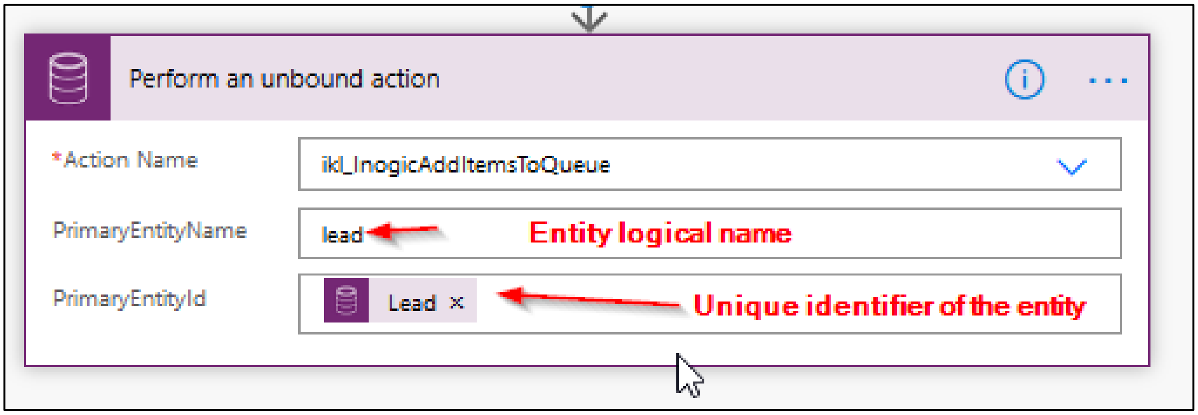
- Select Trigger condition (For example, Update).
- Select entity for which you want to enable automatic assignment. Select Scope as **'Organization'**.
- Based on the requirement add Filtering attributes and Filter expression. For Example, if you want to run the assignment on change of only 'status reason' field then add **'statuscode'** as logical name of the field. The flow will trigger only on change of the **Status Reason** field.



- Add **'Perform an unbound action'** step.



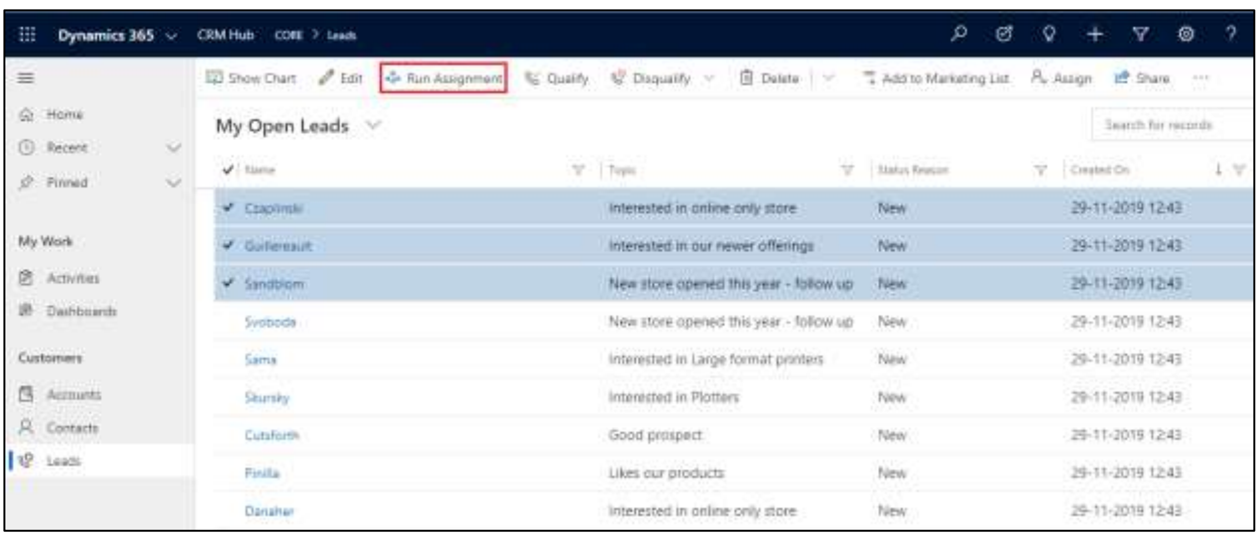
- Select **'ikl_InogicAddItemsToQueue'** in Action Name, enter logical name of your main entity in Primary Entity name and select unique identifier of the current record in PrimaryEntityId.



- Save and test the Power Automate flow.

Auto-Assign Existing Records

Run Assignment is used to auto-assign the already existing Leads (before the installation of solution) in your CRM to respective users as per the newly configured assignment rules. This button is only visible for those entities against which assignment configuration is enabled.

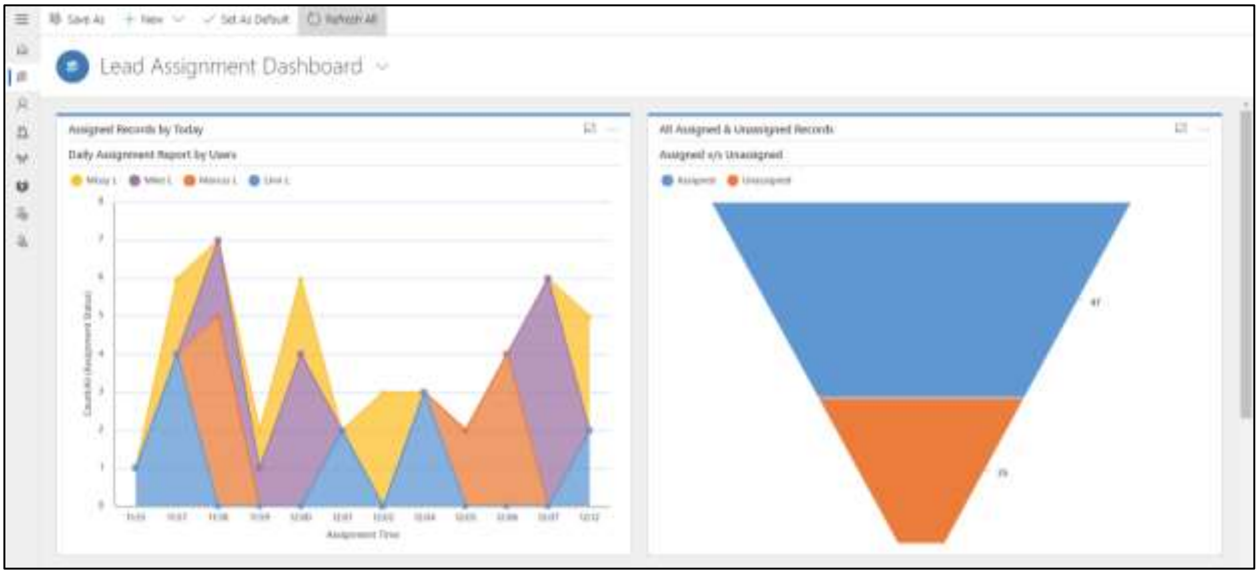


Note:

- ***The maximum records that can be assigned is 20***
- ***This button is only visible to Lead Assignment and Distribution Automation Administrator and System Administrator***

Monitoring & Analytics

Lead Assignment Dashboards provides visual representation of Assigned and Un-assigned Leads through various charts and graphs. Users can create their own dashboards as per customer requirement.



Assignment Error Logs

Errors logs are listed in 'Assignment Error Logs' Entity during any fallout while performing features. If the assignment is not working then look for Assignment Error Logs entity records. We can use this logs to troubleshoot the issue.

Contact Us

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