



Lead.Assign.Distribute

inogic

White Paper

Lead Assignment and Distribution Automation - White Paper

Aim:

Lead Assignment and Distribution Automation is a productivity app that assures systematic allotment/assignment of leads to respective Dynamics 365 CRM users based on user ability and workload.

Features:

- Supports OOB as well as Custom Entities
- Fair distribution of Leads with Round Robin algorithm
- Assign leads depending on individual user capacity
- 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

Supported Versions

Versions: Microsoft Dynamics 365 v9.x and above, Dataverse (Power Apps).

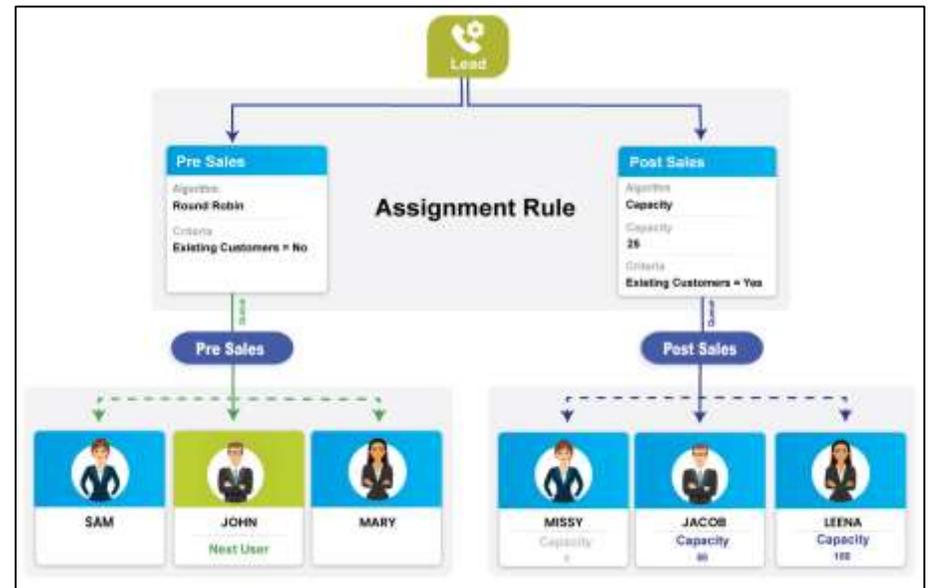
Deployment Models: On-Premises and Online.

Who needs it?

Lead Assignment and Distribution Automation helps managers to allocate and distribute incoming leads and customer queries in an organized way to the respective team members. In this way, manager can ensure each and every Lead is pursued with diligence by the team members. There will be no more loss of Leads due to negligence and mismanagement. Such efficient lead management will further improve sales and increase ROI.

LEAD ASSIGNMENT AND DISTRIBUTION AUTOMATION USE CASE DIAGRAM

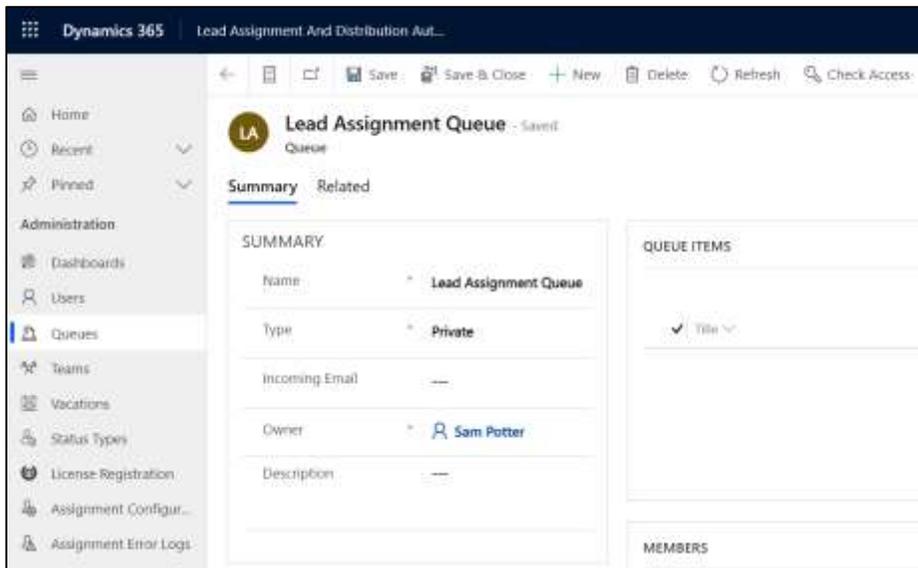
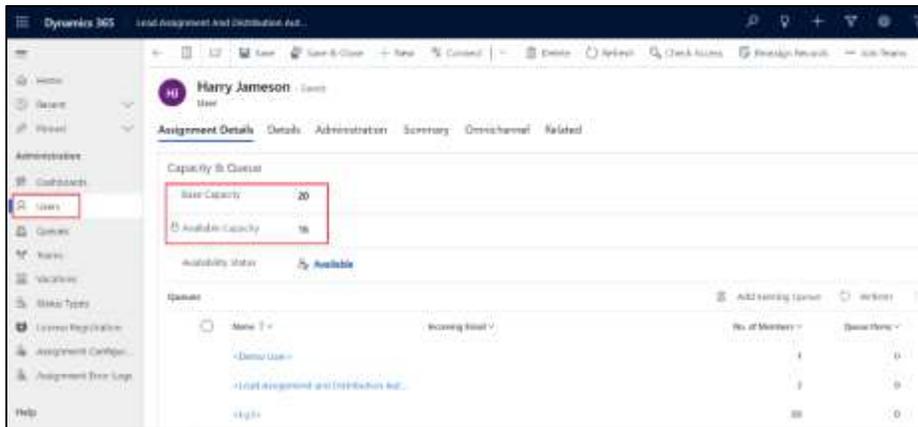
The following diagram illustrates the two Assignment Rules of Lead assignment - Round Robin and Capacity Assignment Algorithm.



QUEUE & USERS

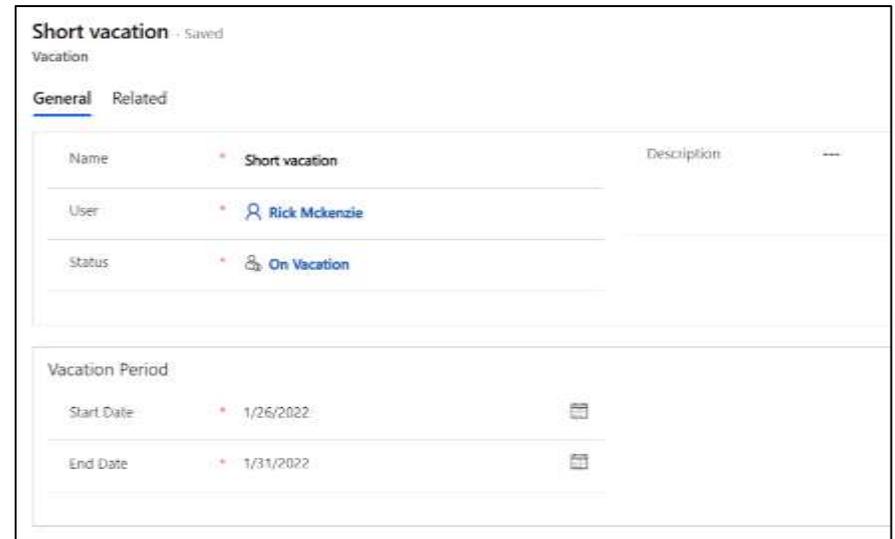
Setup Queues & Users to assign leads among the Dynamics 365 CRM users.

Lead Assignment and Distribution Automation - White Paper



Set User Availability

Set user availability status as 'available' or 'unavailable' based on which records will be assigned to users in CRM.



Assignment Configuration

Enable OOB or Custom entities for automatic assignment.



Assignment Rules

Create assignment rules to distribute Leads based on Round Robin Algorithm and Capacity Algorithm.

Lead Assignment and Distribution Automation - White Paper

Round Robin Algorithm:

Leads from Website - Detail
Assignment Rule

General | User Workload | Related

Name: Leads from Website
Description: Assign Leads from website

Execution Criteria

Criteria Mode: **Advanced**

Criteria Rule: `<block version="1.0" output-format="xml-platform" mapping="logical" dataset="lead">
 <entry name="lead">
 <attribute name="firstname"/>
 <attribute name="lastname"/>
 <attribute name="statuscode"/>
 <attribute name="subject"/>
 <attribute name="leadid"/>
 <attribute name="created"/>
 <order attribute="created" descending="true"/>
 </entry>
</block>`

Execution Order: 1
Consider Availability: **Yes**

Save | 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

Capacity Algorithm:

Lead Capacity Rule - Detail
Assignment Rule

General | User Workload | Related

Name: Lead Capacity Rule
Description: Assign Leads based on user capacity

Execution Criteria

Criteria Mode: **Simple**

Criteria Rule: `<block version="1.0" output-format="xml-platform" mapping="logical" dataset="lead">
 <entry name="lead">
 <attribute name="lastname"/>
 <attribute name="created"/>
 <attribute name="statuscode"/>
 <attribute name="subject"/>
 <order attribute="created" descending="true"/>
 </entry>
</block>`

Execution Order: 1
Consider Availability: **Yes**

Save | Capacity

Assignment Properties

Assignment Algorithm: **Capacity**

Maximum Work Items Allowed To Be Assigned: **10**

Period: **Overall**

Unit Effort Required For Work Item: **2**

Open Work Item Statuses: Open-New

Auto-Assign Existing Leads

Auto-assign already existing Leads (before the installation of solution) in your CRM to respective users as per the newly configured Assignment Rules with on-demand 'Run Assignment' button.

