



# Auto Assignment

**Date:** 28<sup>th</sup> September 2017

**Document Version History**

<b>#</b>	<b>Date</b>	<b>Author</b>	<b>Reason</b>	<b>Version</b>
1	23/08/17	Pragmasys	Initial Version	0.1
2	28/09/2017	Pragmasys	Updated Functionality	0.2

## Table of Contents

1. <a href="#"><u>Introduction .....</u></a>	<a href="#"><u>4</u></a>
2. <a href="#"><u>Direct Assignment .....</u></a>	<a href="#"><u>5</u></a>
3. <a href="#"><u>Round Robin .....</u></a>	<a href="#"><u>10</u></a>
4. <a href="#"><u>Load Balancing.....</u></a>	<a href="#"><u>14</u></a>
5. <a href="#"><u>Assignment of a record using round robin/load balancing with category.....</u></a>	<a href="#"><u>20</u></a>
6. <a href="#"><u>Assignment based on category.....</u></a>	<a href="#"><u>25</u></a>

## 1. INTRODUCTION

### Purpose of this Guide

This user manual is designed to demonstrate how an auto assignment plugin is configured for the assignment type user or group.

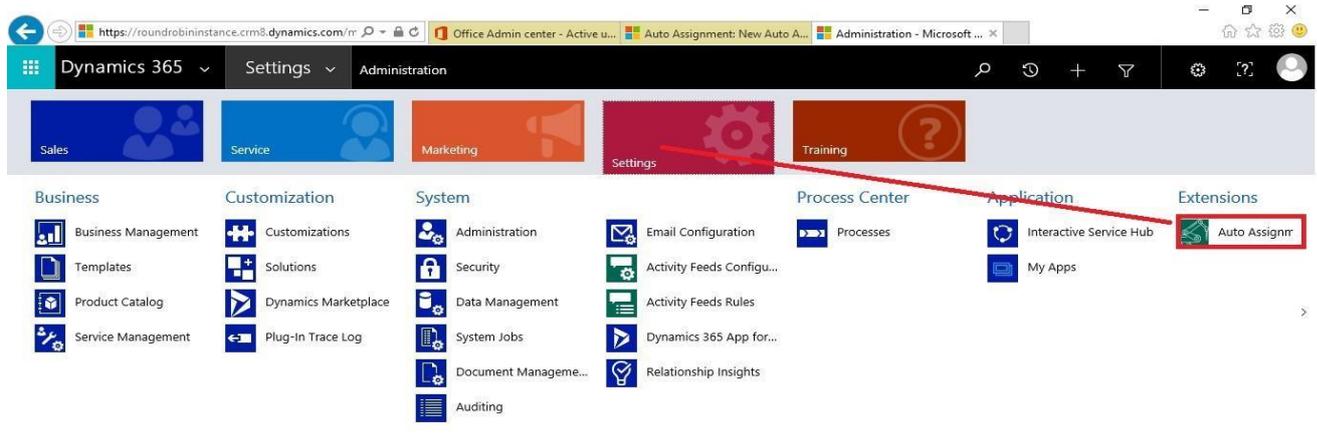
It illustrates the assignment logic as below:

- a. Direct Assignment, assignment type is user
- b. Round Robin Assignment
- c. Load Balancing
- d. Assignment of the records using round robin/load balancing based on category
- e. Assignment of the records based on category

## 2. DIRECT ASSIGNMENT

### Scenario 1

**Step 1** - Click on the menu bar followed by Settings sitemap. Now click on the Auto Assignment present below the Extensions option.



**Step 2** - The below snapshot depicts the configuration part for auto assignment. Here the assignment type is categorized into User and Group.

Assignment Type

- a.) User
- b.) Group

Entity field will display the drop-down list for the available entities in MS CRM.

The entity specified in the Entity implies that the assignment will trigger on creation of that respective entity.

AUTO ASSIGNMENT : INFORMATION

# New Auto Assignment

## General

### Configuration

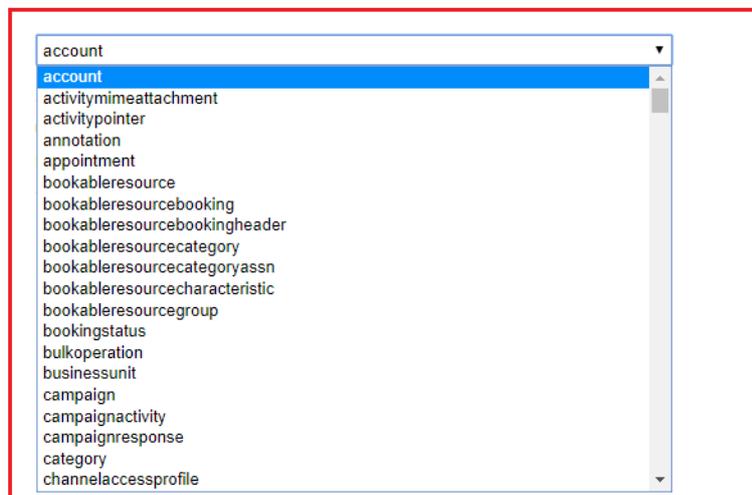
Entity

Display Name +

Assignment Type

Based on Category

User \*



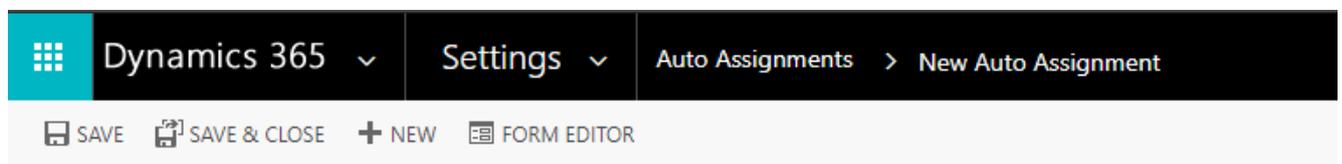
A dropdown menu for selecting an entity. The list includes: account, account, activitymimeattachment, activitypointer, annotation, appointment, bookableresource, bookableresourcebooking, bookableresourcebookingheader, bookableresourcecategory, bookableresourcecategoryasn, bookableresourcecharacteristic, bookableresourcegroup, bookingstatus, bulkoperation, businessunit, campaign, campaignactivity, campaignresponse, category, and channelaccessprofile. The first 'account' entry is highlighted in blue.

List of entities

**Step 3** – Select the schema name and specify the user name to whom the case should get assigned to.

Here a user is selected as highlighted below and save the record.

- Assignment type = User
- Entity = incident
- Display Name = Case



AUTO ASSIGNMENT : INFORMATION

## New Auto Assignment

### General

#### Configuration

Entity	incident
Display Name <sup>+</sup>	Case
Assignment Type	User
Based on Category	No
User*	Nitya Bhargavi

Select the schema name

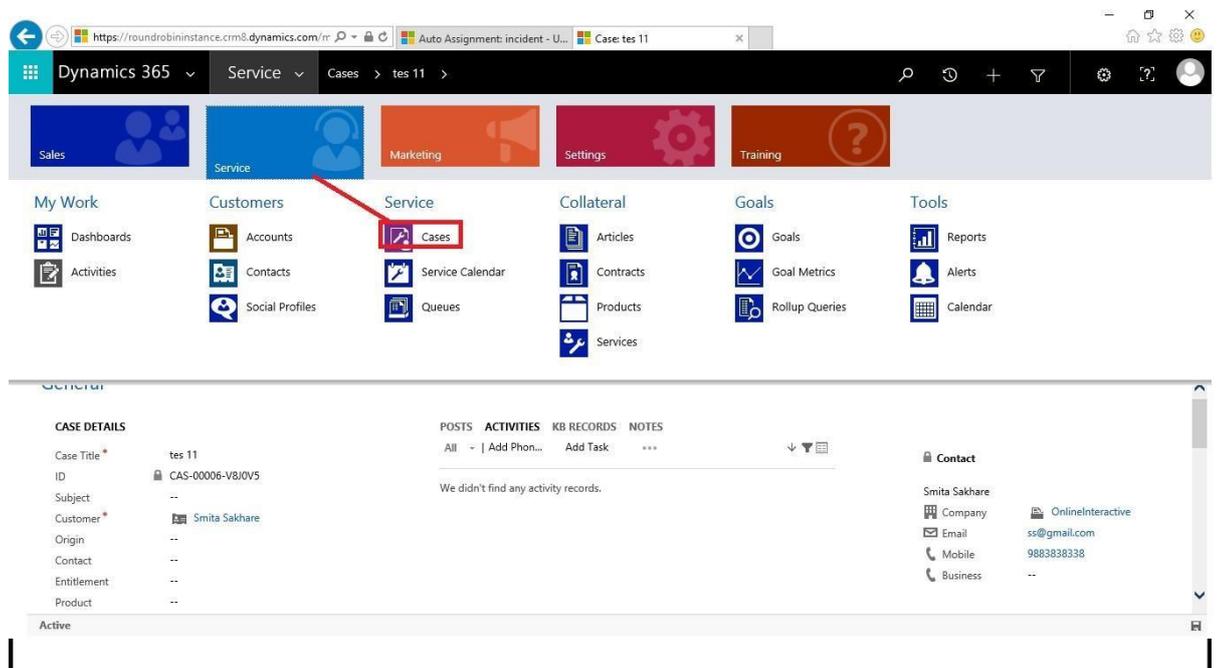
Specify the display name

Select the user

## TEST RESULT OF DIRECT ASSIGNMENT:

Creation of a case:

Click on the menu bar followed by Services sitemap. Now click on the Cases present below the Service option



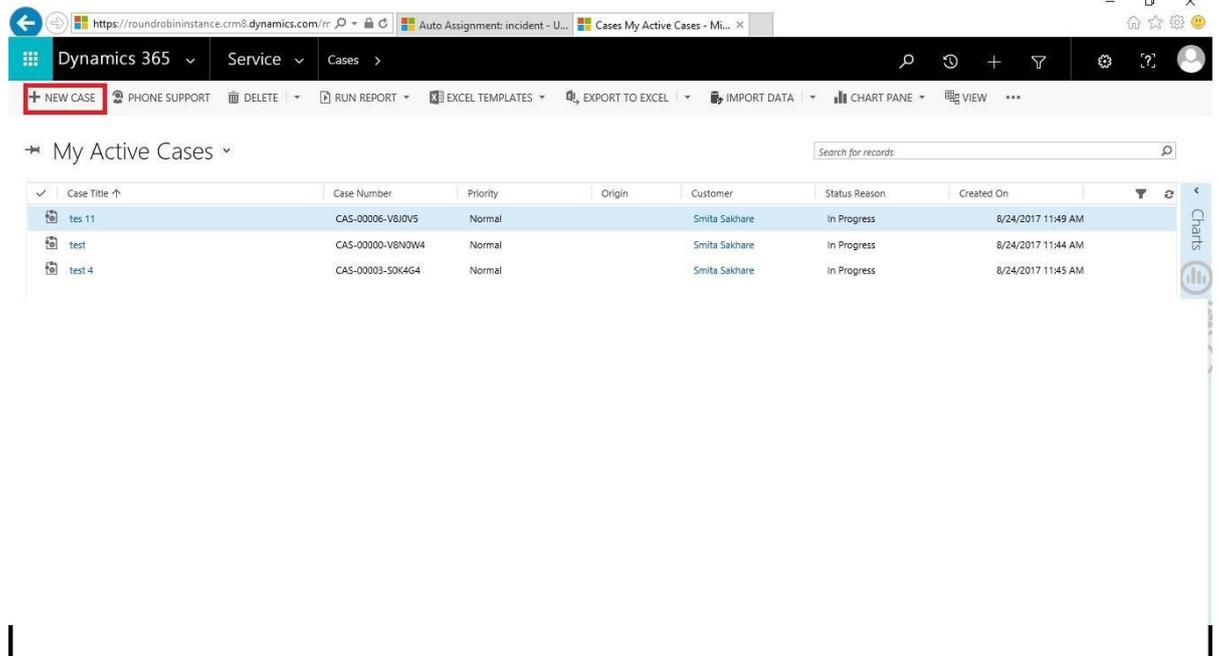
The screenshot shows the Dynamics 365 interface for the 'Service' department. The breadcrumb navigation is 'Dynamics 365 > Service > Cases > tes 11'. The main navigation bar includes Sales, Service, Marketing, Settings, and Training. The 'Service' menu is expanded, showing options like Accounts, Contacts, Social Profiles, Cases, Service Calendar, and Queues. The 'Cases' option is highlighted with a red box and a red arrow. Below the navigation, the 'CASE DETAILS' section shows the case title 'tes 11', ID 'CAS-00006-V8J0V5', and customer 'Smita Sakhare'. The 'ACTIVITIES' section is empty, displaying the message 'We didn't find any activity records.' The 'CONTACT' section shows the contact details for Smita Sakhare, including company, email, and mobile number.

CASE DETAILS	
Case Title *	tes 11
ID	CAS-00006-V8J0V5
Subject	--
Customer *	Smita Sakhare
Origin	--
Contact	--
Entitlement	--
Product	--

ACTIVITIES	
We didn't find any activity records.	

CONTACT	
Smita Sakhare	
Company	OnlineInteractive
Email	ss@gmail.com
Mobile	9883838338
Business	--

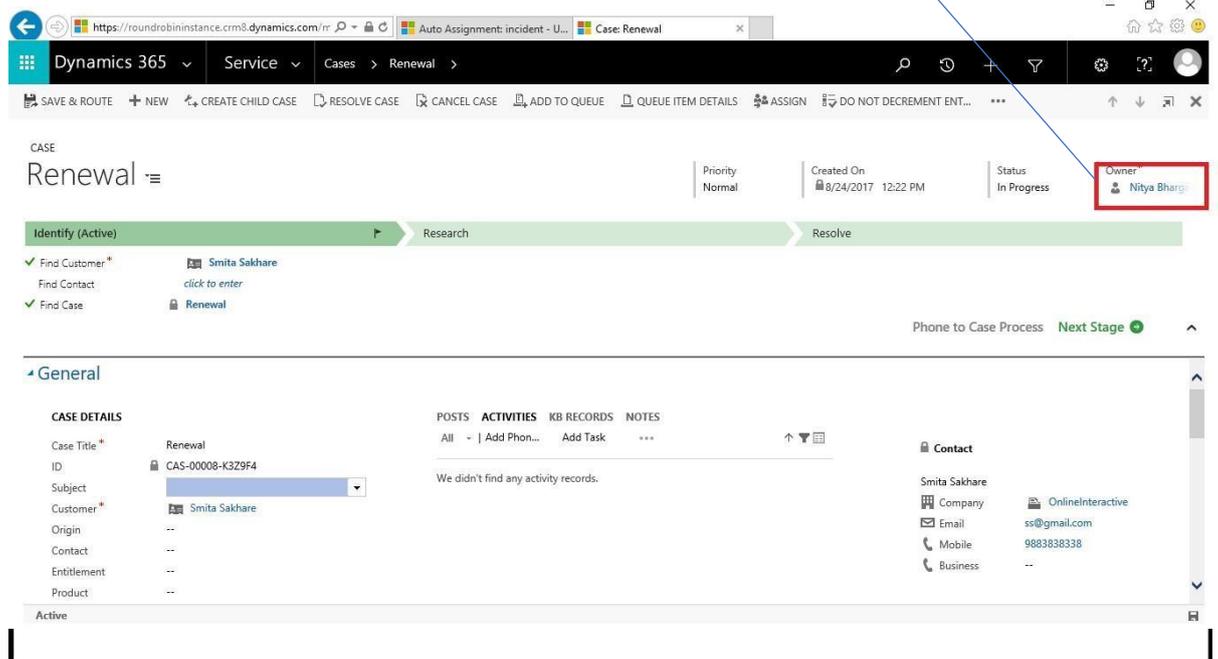
Click on the +NEW CASE button



Case Title	Case Number	Priority	Origin	Customer	Status Reason	Created On
tes 11	CAS-00006-V8J0V5	Normal		Smita Sakhare	In Progress	8/24/2017 11:49 AM
test	CAS-00000-V8N0W4	Normal		Smita Sakhare	In Progress	8/24/2017 11:44 AM
test 4	CAS-00003-S0K4G4	Normal		Smita Sakhare	In Progress	8/24/2017 11:45 AM

Create a case and save it

As per the configuration the case gets assigned to the user



**Case Details:**

- Case Title: Renewal
- ID: CAS-00008-K3Z9F4
- Subject: [Dropdown]
- Customer: Smita Sakhare
- Origin: ...
- Contact: ...
- Entitlement: ...
- Product: ...

**Case Information:**

- Priority: Normal
- Created On: 8/24/2017 12:22 PM
- Status: In Progress
- Owner: Nitya Bhargava

**Process Flow:** Identify (Active) → Research → Resolve

**Activities:** Find Customer, Find Contact, Find Case

**Contact Information:** Smita Sakhare, Company: OnlineInteractive, Email: ss@gmail.com, Mobile: 9883838338

### 3. ROUND ROBIN ASSIGNMENT

#### Scenario 1 -Configuration for round robin

Dynamics 365 Settings Auto Assignments > Case - Round Robin >

+ NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG WORD TEMPLATES RUN REPORT FORM EDITOR

AUTO ASSIGNMENT : INFORMATION

## Case - Round Robin

### General

#### Configuration

Entity

Select Schema  
Name of Entity

Display Name <sup>+</sup> Case

Assignment Type **Group**

Assignment  
Type Group

Logic Type <sup>\*</sup> Round Robin

Based on Category No

Team <sup>\*</sup> **Team B**

#### Team Members

Full Name ↑	Primary Email	Counter
Pranav Kumar		0
Pulkit Srivastava		0
Sudhanshu Gupta		0

## TEST RESULT OF ROUND ROBIN ASSIGNMENT:

Creation of a case

Assignment will happen based on round robin configuration

The screenshot shows a Dynamics 365 case record for 'Renewal'. The 'Owner' field is highlighted with a red box and contains 'Pulkit Srivastava'. The case is in the 'Identify (Active)' stage. The 'General' section shows case details: Case Title 'Renewal', ID 'CAS-00010-Z7L8M0', and Customer 'Smita Sakhare'. The 'Contact' section lists 'Smita Sakhare' with company 'OnlineInteractive', email 'ss@gmail.com', and mobile '9883838338'.

## Assignment Logic

The screenshot shows the 'Auto Assignments' configuration for 'Case - Round Robin'. The 'Configuration' section shows: Entity 'incident', Display Name 'Case', Assignment Type 'Group', Logic Type 'Round Robin', Based on Category 'No', and Team 'Team B'. The 'Team Members' table is shown below:

Full Name ↑	Primary Email	Counter
Pranav Kumar		0
Pulkit Srivastava		1
Sudhanshu Gupta		0

A blue callout box points to the 'Counter' column with the text: 'The case count is updated against that user'. The 'Counter' column is also highlighted with a red box.

**Scenario 2** - When the case counter is same for all the users. Here the counter is one for all below users.

Dynamics 365 Settings Auto Assignments > Case - Round Robin >

+ NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG WORD TEMPLATES RUN REPORT FORM ED

AUTO ASSIGNMENT : INFORMATION

## Case - Round Robin

### General

#### Configuration

Entity

Display Name <sup>+</sup> **Case**

Assignment Type **Group**

Logic Type <sup>\*</sup> **Round Robin**

Based on Category **No**

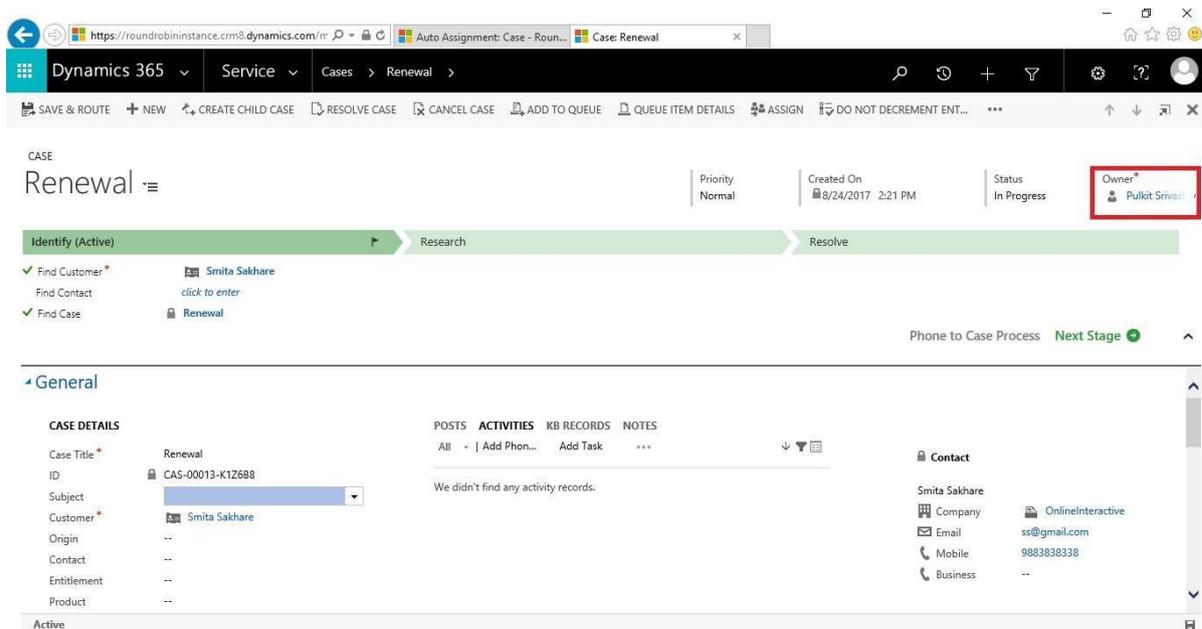
Team <sup>\*</sup>

#### Team Members

Full Name ↑	Primary Email	Counter
Pranav Kumar		1
Pulkit Srivastava		1
Sudhanshu Gupta		1

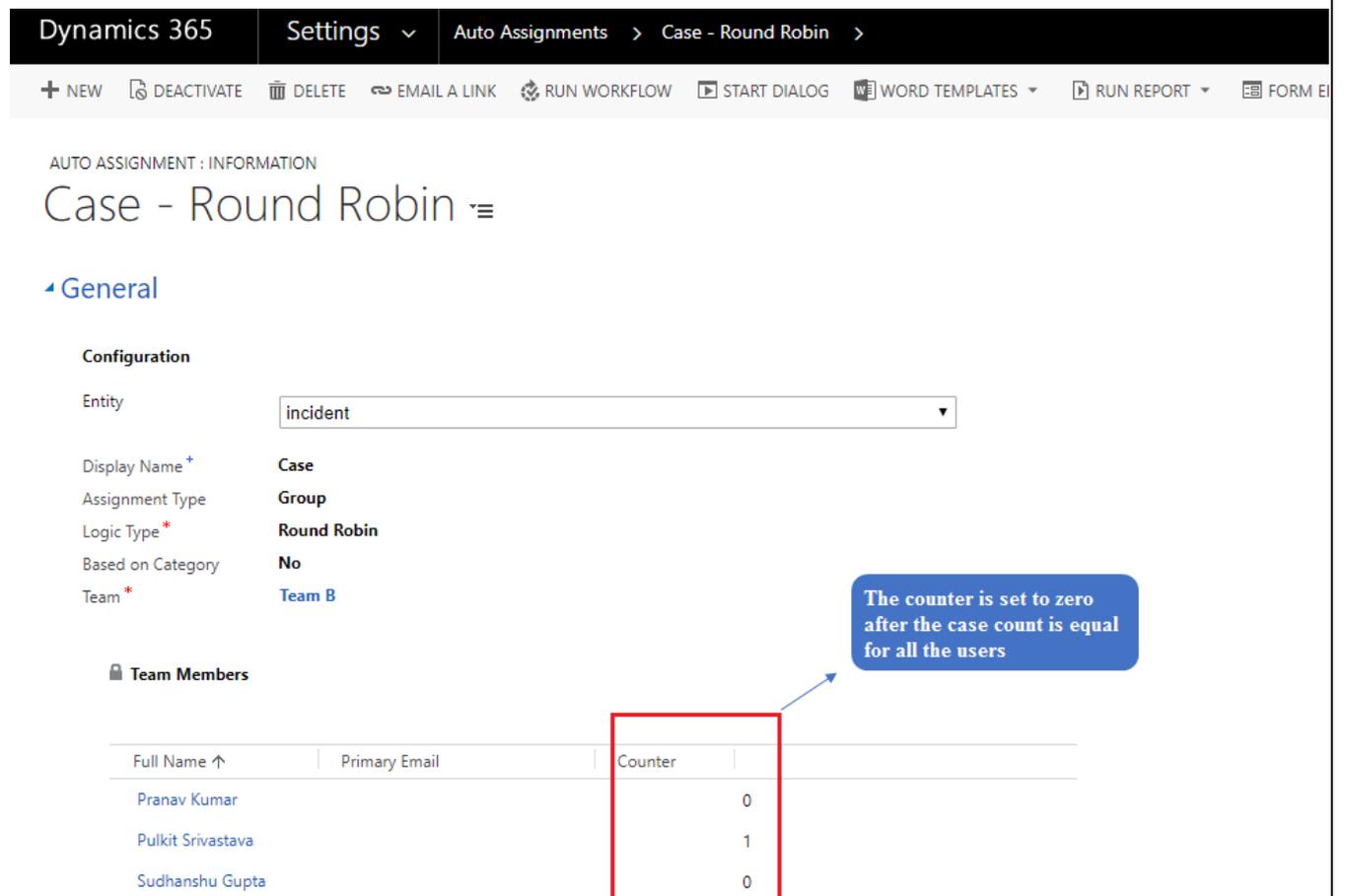
## TEST RESULT OF ROUND ROBIN ASSIGNMENT:

### Creation of a case



The screenshot shows the Dynamics 365 interface for a case titled "Renewal". The case is currently in the "Identify (Active)" stage, with a progress bar showing "Identify (Active)" followed by "Research" and "Resolve". The "Owner" field is highlighted with a red box and shows "Pulkit Srivastava". The "General" section contains case details such as Case Title, ID (CAS-00013-K12688), Subject, Customer (Smita Sakhare), and Contact information.

### Counter resets



The screenshot shows the "Auto Assignment: Information" page for a "Case - Round Robin" configuration. The configuration is set for the "incident" entity, with a display name of "Case", assignment type of "Group", logic type of "Round Robin", and team of "Team B". The "Team Members" section contains a table with columns for Full Name, Primary Email, and Counter. The counter values are 0 for Pranav Kumar, 1 for Pulkit Srivastava, and 0 for Sudhanshu Gupta. A blue callout box points to the counter column, stating: "The counter is set to zero after the case count is equal for all the users".

Full Name ↑	Primary Email	Counter
Pranav Kumar		0
Pulkit Srivastava		1
Sudhanshu Gupta		0

## 4. LOAD BALANCING ASSIGNMENT

Dynamics 365 Settings Auto Assignments Case - Load Balancing

AUTO ASSIGNMENT : INFORMATION

### Case - Load Balancing

General

**Configuration**

Entity: incident

Display Name: Case

Assignment Type: Group

Logic Type: Load Balancing

Based on Category: No

Team: Team 2

LogicType is Load Balancing

The counter will be set to zero only once

**Team Members**

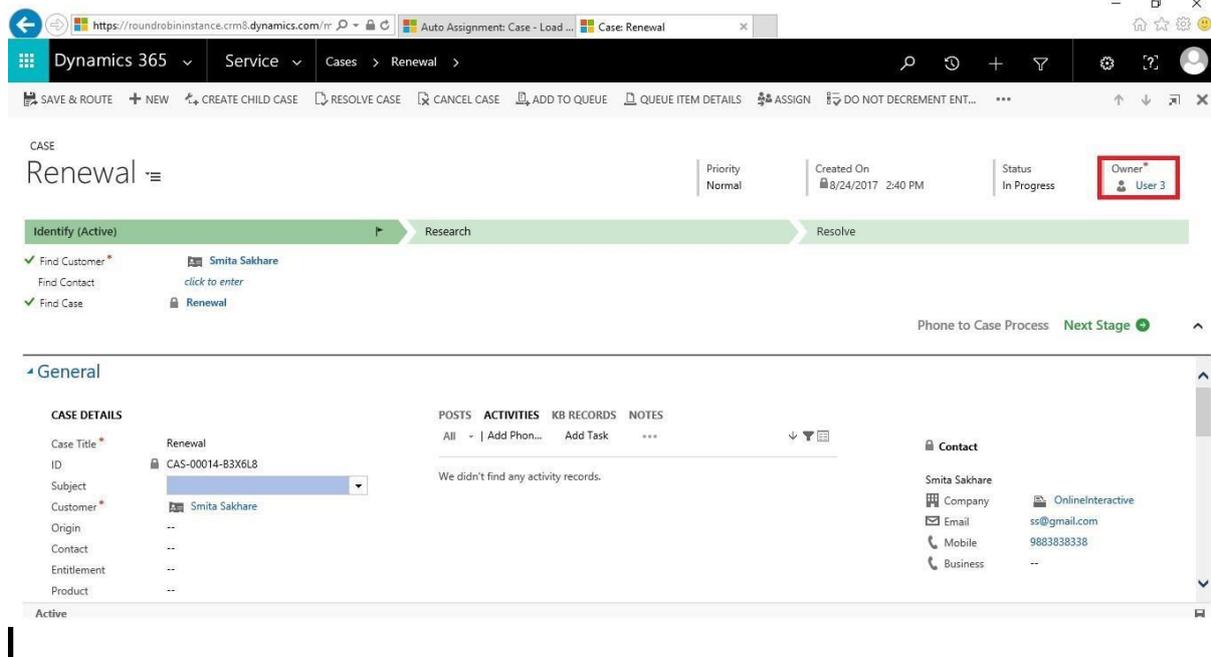
Full Name ↑	Primary Email	Counter
user 2	user2@testorg004.onmicrosoft.com	0
User 3	User3@testorg004.onmicrosoft.com	0
Vishakha Mhaske	vishakhamhaske@testorg004.onmi...	0

**NOTE:** Here the round robin configuration can also work for one or more teams.

In such cases, there needs to be made same/different configurations as per the team for the same assignment logic.

## TEST RESULT OF LOAD BALANCING ASSIGNMENT:

### Creation of a case



The screenshot shows the Dynamics 365 interface for a case titled "Renewal". The breadcrumb navigation is "Cases > Renewal". The case details include:

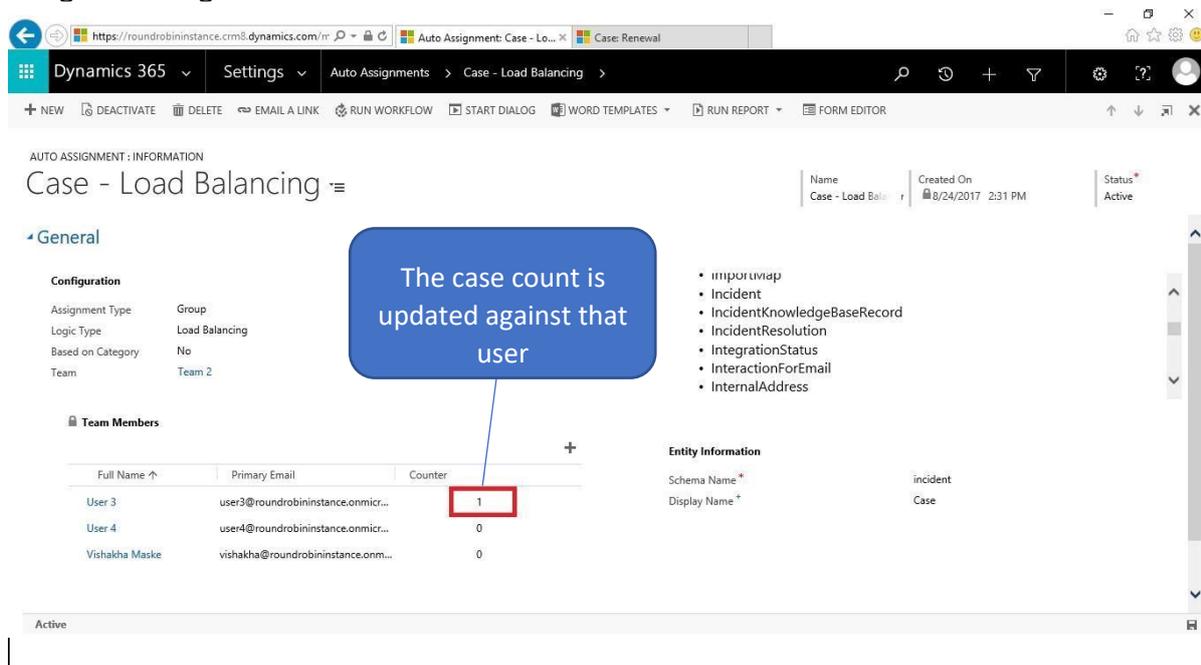
- Priority: Normal
- Created On: 8/24/2017 2:40 PM
- Status: In Progress
- Owner: User 3 (highlighted with a red box)

The process flow is: Identify (Active) → Research → Resolve. Under "Identify (Active)", the following steps are listed:

- Find Customer\* (Smita Sakhare)
- Find Contact (click to enter)
- Find Case (Renewal)

The "General" section shows "CASE DETAILS" for "Renewal" with ID "CAS-00014-B3X6L8". The "Contact" information for Smita Sakhare is also visible.

### Assignment Logic



The screenshot shows the "Auto Assignment: Case - Load Balancing" configuration page. The breadcrumb navigation is "Settings > Auto Assignments > Case - Load Balancing". The configuration details include:

- Name: Case - Load Balancing
- Created On: 8/24/2017 2:31 PM
- Status: Active

The "General" section shows "Configuration" details:

- Assignment Type: Group
- Logic Type: Load Balancing
- Based on Category: No
- Team: Team 2

The "Team Members" table is shown below:

Full Name	Primary Email	Counter
User 3	user3@roundrobininstance.onmic...	1 (highlighted with a red box)
User 4	user4@roundrobininstance.onmic...	0
Vishakha Maske	vishakha@roundrobininstance.onmic...	0

A blue callout box with a white border points to the "Counter" value of 1 for User 3, containing the text: "The case count is updated against that user".

The "Entity Information" section shows:

- Schema Name: incident
- Display Name: Case

Scenario 2 – When the case counter is same for all the users.

Dynamics 365 Settings Auto Assignments Case - Load Balancing

+ NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG WORD TEMPLATES RUN

AUTO ASSIGNMENT : INFORMATION

# Case - Load Balancing

## General

### Configuration

Entity: incident

Display Name: Case

Assignment Type: Group

Logic Type: Load Balancing

Based on Category: No

Team: Team 2

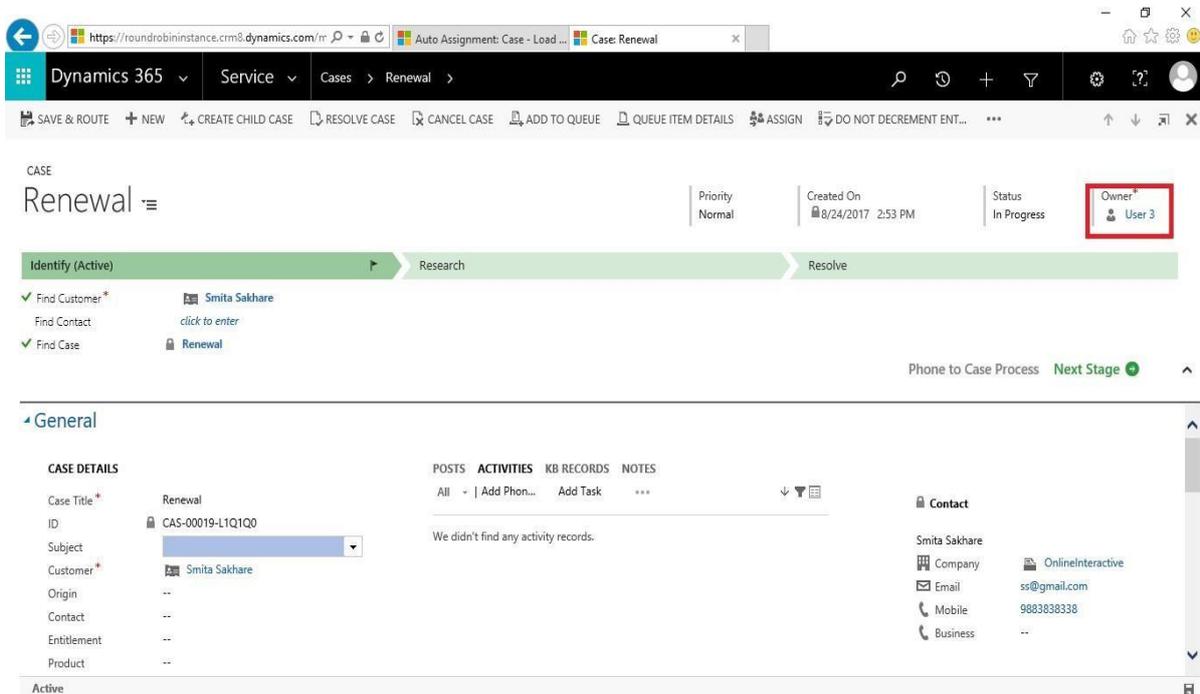
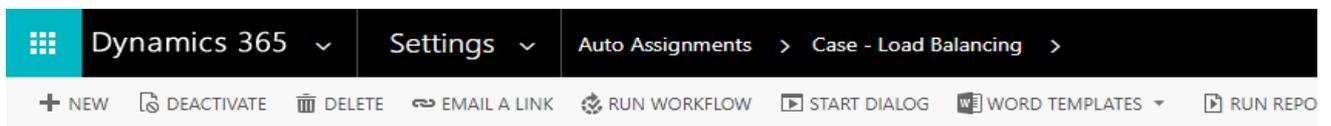
### Team Members

Full Name ↑	Primary Email	Counter
user 2	user2@testorg004.onmicrosoft.com	2
User 3	User3@testorg004.onmicrosoft.com	2
Vishakha Mhaske	vishakhamhaske@testorg004.onmi...	2

The counter is same for all the users

## TEST RESULT OF LOAD BALANCING ASSIGNMENT:

### Creation of a case

#### AUTO ASSIGNMENT : INFORMATION

## Case - Load Balancing

### General

#### Configuration

Entity	incident
Display Name +	Case
Assignment Type	Group
Logic Type *	Load Balancing
Based on Category	No
Team *	Team 2

#### Team Members

Full Name	Primary Email	Counter
User 3	User3@testorg004.onmicrosoft.com	3
user 2	user2@testorg004.onmicrosoft.com	2
Vishakha Mhaske	vishakhamhaske@testorg004.onmi...	2

Updates the case count of the user

### Scenario 3 – Load balancing assignment works as per the lowest record count

Dynamics 365 Settings Auto Assignments Case - Load Balancing

+ NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG WORD TEMPLATES RUN REPO

AUTO ASSIGNMENT : INFORMATION

## Case - Load Balancing

### General

#### Configuration

Entity: incident

Display Name: Case

Assignment Type: Group

Logic Type: Load Balancing

Based on Category: No

Team: Team 2

#### Team Members

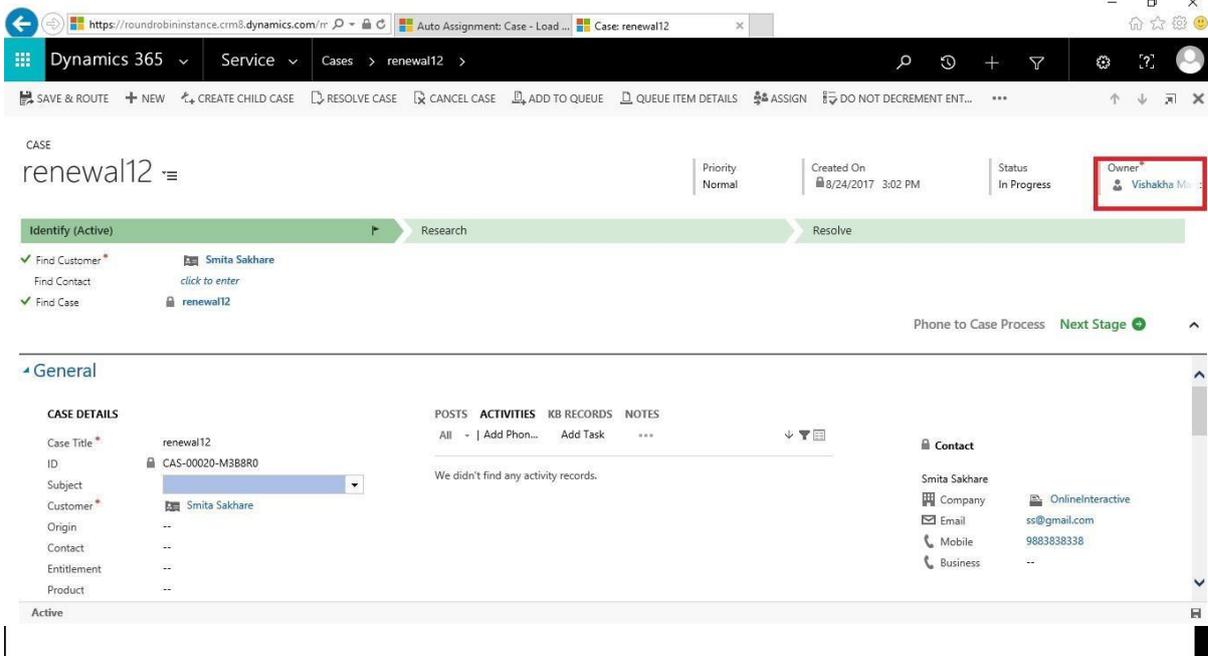
Full Name	Primary Email	Counter ↓
User 3	User3@testorg004.onmicrosoft.com	3
user 2	user2@testorg004.onmicrosoft.com	2
Vishakha Mhaske	vishakhamhaske@testorg004.onmi...	2

**NOTE:** Here the load balancing configuration can also work for one or more teams.

In such cases, there needs to be made same/different configurations as per the team for the same assignment logic.

## TEST RESULT OF LOAD BALANCING ASSIGNMENT:

### Creation of a case



Case: renewal12

Priority: Normal | Created On: 8/24/2017 3:02 PM | Status: In Progress | Owner: Vishakha Mhaske

Identify (Active) → Research → Resolve

Find Customer: Smita Sakhare  
Find Contact: click to enter  
Find Case: renewal12

Phone to Case Process Next Stage

**General**

**CASE DETAILS**

Case Title: renewal12  
ID: CAS-00020-M3B8R0  
Subject: [Dropdown]  
Customer: Smita Sakhare  
Origin: --  
Contact: --  
Entitlement: --  
Product: --

**POSTS ACTIVITIES KB RECORDS NOTES**

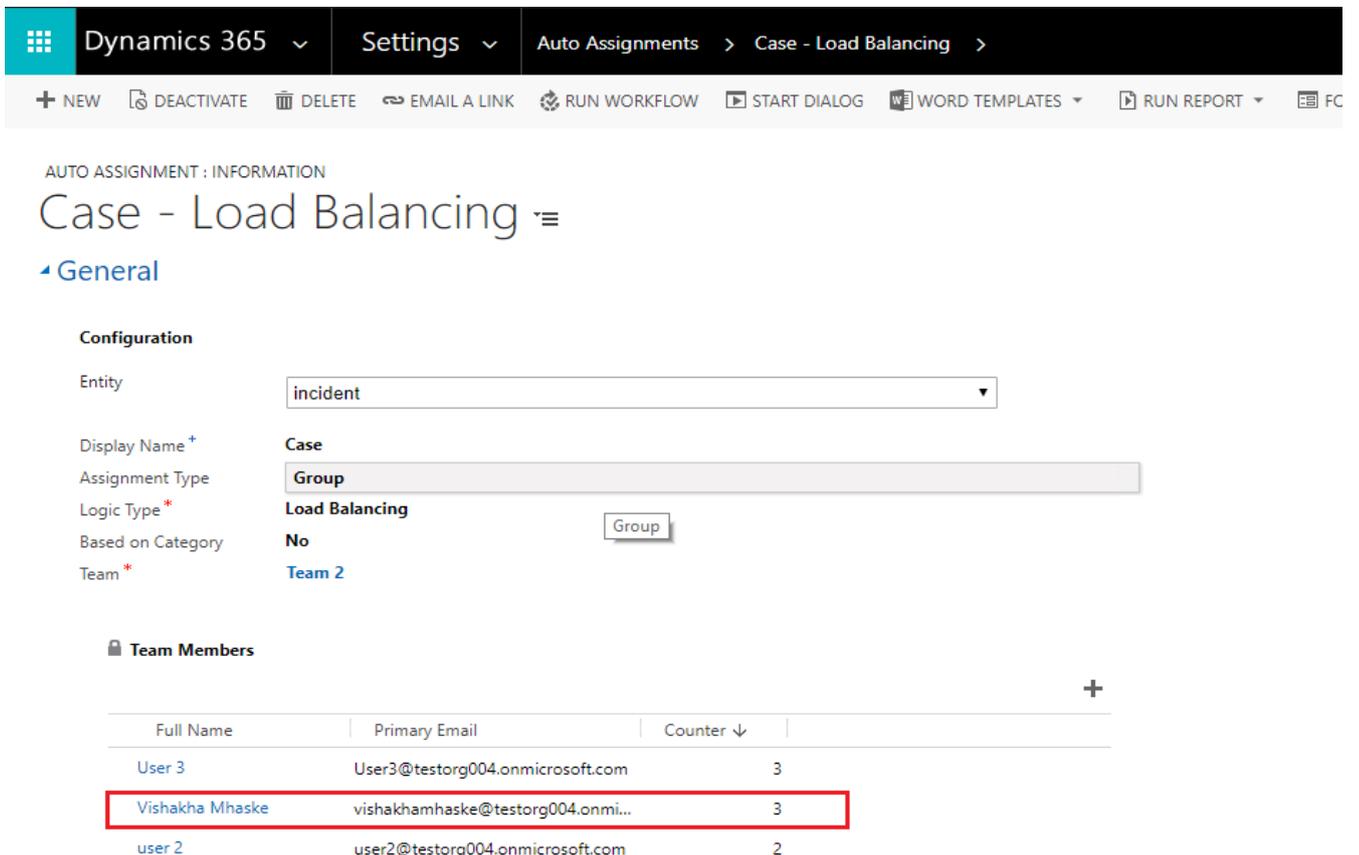
All | Add Phon... | Add Task | ...

We didn't find any activity records.

**Contact**

Smita Sakhare  
Company: OnlineInteractive  
Email: ss@gmail.com  
Mobile: 9883838338  
Business: --

Assignment works as per the lowest record count available between the users



Dynamics 365 | Settings | Auto Assignments > Case - Load Balancing

AUTO ASSIGNMENT : INFORMATION

### Case - Load Balancing

**General**

**Configuration**

Entity: incident

Display Name: Case

Assignment Type: Group

Logic Type: Load Balancing

Based on Category: No

Team: Team 2

**Team Members**

Full Name	Primary Email	Counter ↓
User 3	User3@testorg004.onmicrosoft.com	3
Vishakha Mhaske	vishakhamhaske@testorg004.onmi...	3
user 2	user2@testorg004.onmicrosoft.com	2

## 5. ASSIGNMENT USING ROUND ROBIN/LOAD BALANCING BASED ON CATEGORY

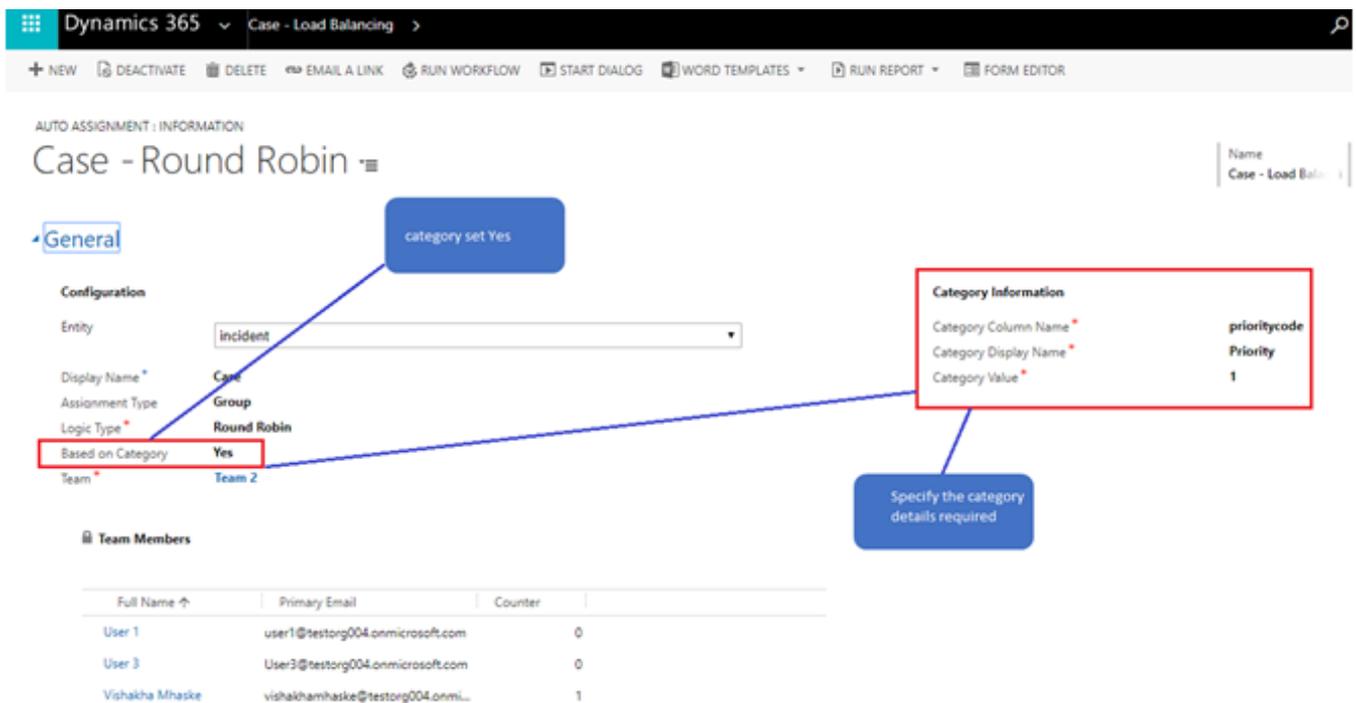
### a.) Assignment of the records using Round Robin based on category

#### Step 1 – Assignment based on category

Logic Type = Round Robin, Category = YES

Mention all the below details:

- Category Column Name
- Category Display Name
- Category Value



**Configuration**

Entity: incident

Display Name: Case

Assignment Type: Group

Logic Type: Round Robin

Based on Category:  Yes

Team: Team 2

**Category Information**

Category Column Name	prioritycode
Category Display Name	Priority
Category Value	1

**Team Members**

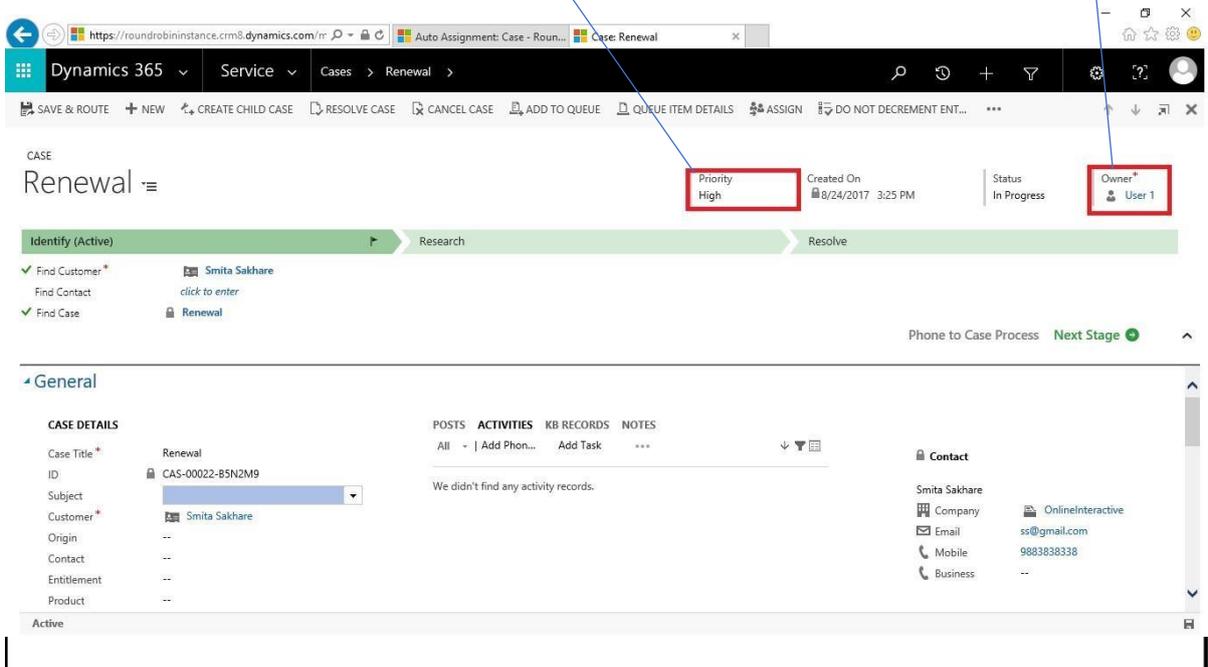
Full Name	Primary Email	Counter
User 1	user1@testorg004.onmicrosoft.com	0
User 3	User3@testorg004.onmicrosoft.com	0
Vishakha Mhaske	vishakhamhaske@testorg004.onmi...	1

## TEST RESULT OF ROUND ROBIN ASSIGNMENT BASED ON CATEGORY :

Creation of a case

The category value 'one' has priority high

Assignment works as per the configuration



**Case Details:**

- Case Title: Renewal
- ID: CAS-00022-85N2M9
- Subject: [Dropdown]
- Customer: Smita Sakhare
- Origin: ---
- Contact: ---
- Entitlement: ---
- Product: ---

**Activity:** Active

**Process Flow:** Identify (Active) → Research → Resolve

**Metadata:** Priority: High, Created On: 8/24/2017 3:25 PM, Status: In Progress, Owner: User 1



**Configuration:**

- Entity: incident
- Display Name: Case
- Assignment Type: Group
- Logic Type: Round Robin
- Based on Category: Yes
- Team: Team 2

### AUTO ASSIGNMENT : INFORMATION

#### Case - Round Robin

#### General

##### Configuration

Entity:

Display Name: **Case**

Assignment Type: **Group**

Logic Type: **Round Robin**

Based on Category: **Yes**

Team: **Team 2**

##### Category Information

Category Column Name: **prioritycode**

Category Display Name: **Priority**

Category Value: **1**

##### Team Members

Full Name ↑	Primary Email	Counter
User 1	user1@testorg004.onmicrosoft.com	1
User 3	User3@testorg004.onmicrosoft.com	0
Vishakha Mhaske	vishakhamhaske@testorg004.onmi...	1

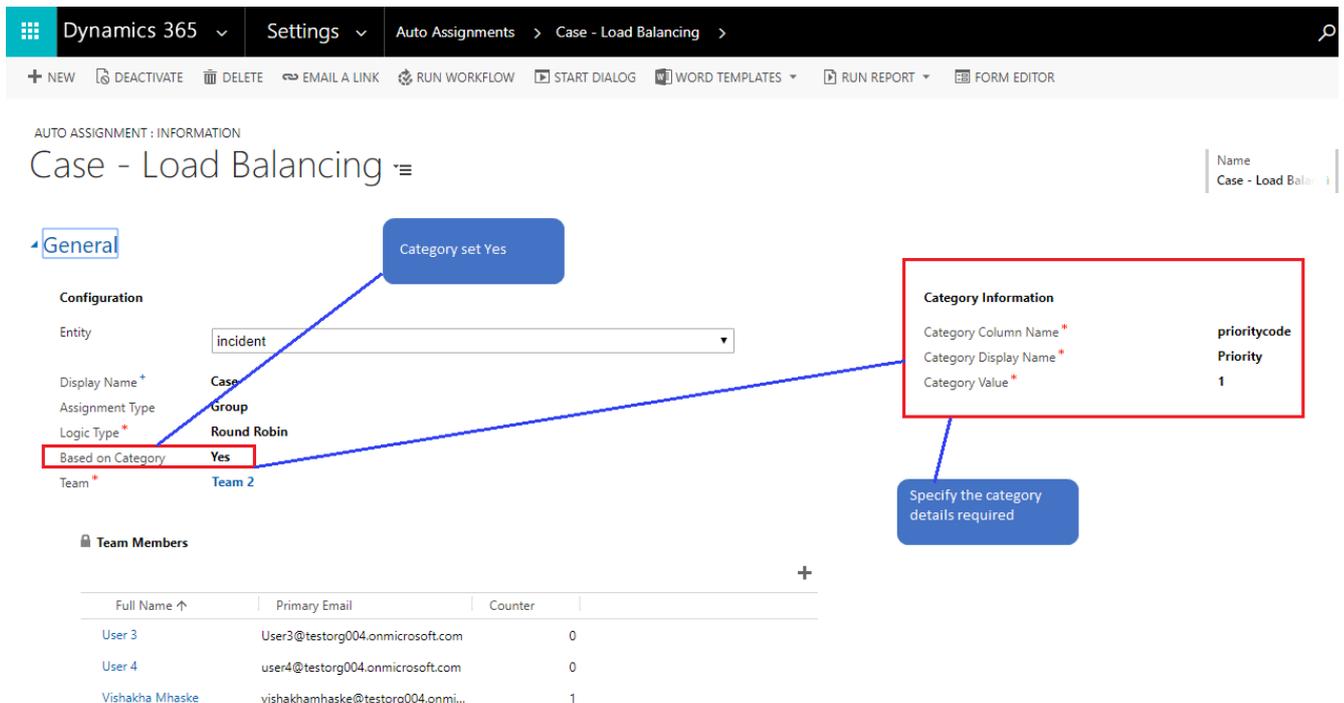
## b.) Assignment of the records using Load Balancing based on category

### Step 1 – Assignment based on category

Logic Type = Load Balancing, Category = YES

Mention all the below details:

- Category Column Name
- Category Display Name
- Category Value



The screenshot shows the Dynamics 365 interface for configuring an auto-assignment rule. The breadcrumb trail is: Dynamics 365 > Settings > Auto Assignments > Case - Load Balancing. The main title is 'Case - Load Balancing'. The 'General' tab is active, showing the following configuration:

- Entity: incident
- Display Name: Case
- Assignment Type: Group
- Logic Type: Round Robin
- Based on Category: Yes (highlighted with a red box)
- Team: Team 2

Annotations on the screenshot include:

- A blue callout box labeled 'Category set Yes' pointing to the 'Based on Category' field.
- A red-bordered box labeled 'Category Information' containing:
 

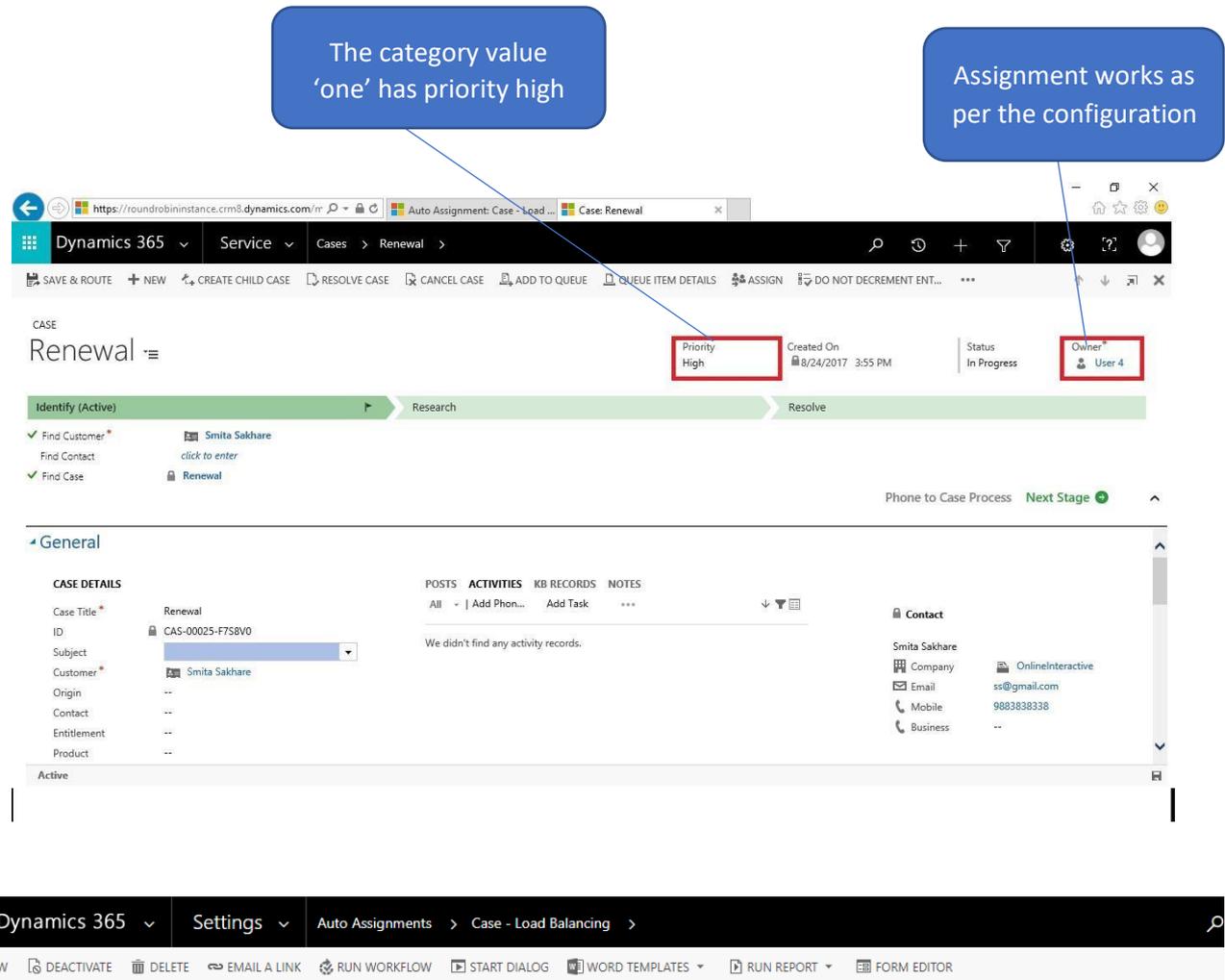
Category Column Name*	prioritycode
Category Display Name*	Priority
Category Value*	1
- A blue callout box labeled 'Specify the category details required' pointing to the 'Category Information' box.

Below the configuration is the 'Team Members' section, which contains a table with the following data:

Full Name ↑	Primary Email	Counter
User 3	User3@testorg004.onmicrosoft.com	0
User 4	user4@testorg004.onmicrosoft.com	0
Vishakha Mhaske	vishakhamhaske@testorg004.onmi...	1

## TEST RESULT OF LOAD BALANCING ASSIGNMENT BASED ON CATEGORY:

Creation of a case



The category value 'one' has priority high

Assignment works as per the configuration

Priority: High

Created On: 8/24/2017 3:55 PM

Status: In Progress

Owner: User 4

Identify (Active) → Research → Resolve

Find Customer: Smita Sakhare

Find Contact: click to enter

Find Case: Renewal

Phone to Case Process Next Stage

General

CASE DETAILS

Case Title: Renewal

ID: CAS-00025-F75BV0

Subject: [Dropdown]

Customer: Smita Sakhare

Origin: ...

Contact: ...

Entitlement: ...

Product: ...

Active

POSTS ACTIVITIES KB RECORDS NOTES

All | Add Phon... Add Task ...

We didn't find any activity records.

Contact

Smita Sakhare

Company: OnlineInteractive

Email: ss@gmail.com

Mobile: 9883838338

Business: ...

Dynamics 365 Settings Auto Assignments Case - Load Balancing

+ NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG WORD TEMPLATES RUN REPORT FORM EDITOR

AUTO ASSIGNMENT : INFORMATION

## Case - Load Balancing

General

### Configuration

Entity: incident

Display Name: Case

Assignment Type: Group

Logic Type: Round Robin

Based on Category: Yes

Team: Team 2

### Category Information

Category Column Name: prioritycode

Category Display Name: Priority

Category Value: 1

### Team Members

Full Name ↑	Primary Email	Counter
User 3	User3@testorg004.onmicrosoft.com	3
User 4	user4@testorg004.onmicrosoft.com	3
Vishakha Mhaske	vishakhamhaske@testorg004.onmi...	3

**NOTE: Here assignment of the records using round robin/load balancing based on category can also work for one or more teams.**

**In such cases, there needs to be made same/different configurations as per the team for the same assignment logic.**

## 6.ASSIGNMENT OF RECORDS USING CATEGORY

### Step 1 - Configuration based on category

Category set YES  
and user is mapped

Dynamics 365 Settings Auto Assignments > incident - User >

+ NEW DEACTIVATE DELETE EMAIL A LINK RUN WORKFLOW START DIALOG WORD TEMPLATES RUN REPORT FORM EDITOR

AUTO ASSIGNMENT : INFORMATION  
incident - User Name incident - User

General

**Configuration**

Entity

Display Name+ **Case**

Assignment Type **User**

Based on Category **Yes**

User\*

**Category Information**

Category Column Name*	prioritycode
Category Display Name*	Priority
Category Value*	1

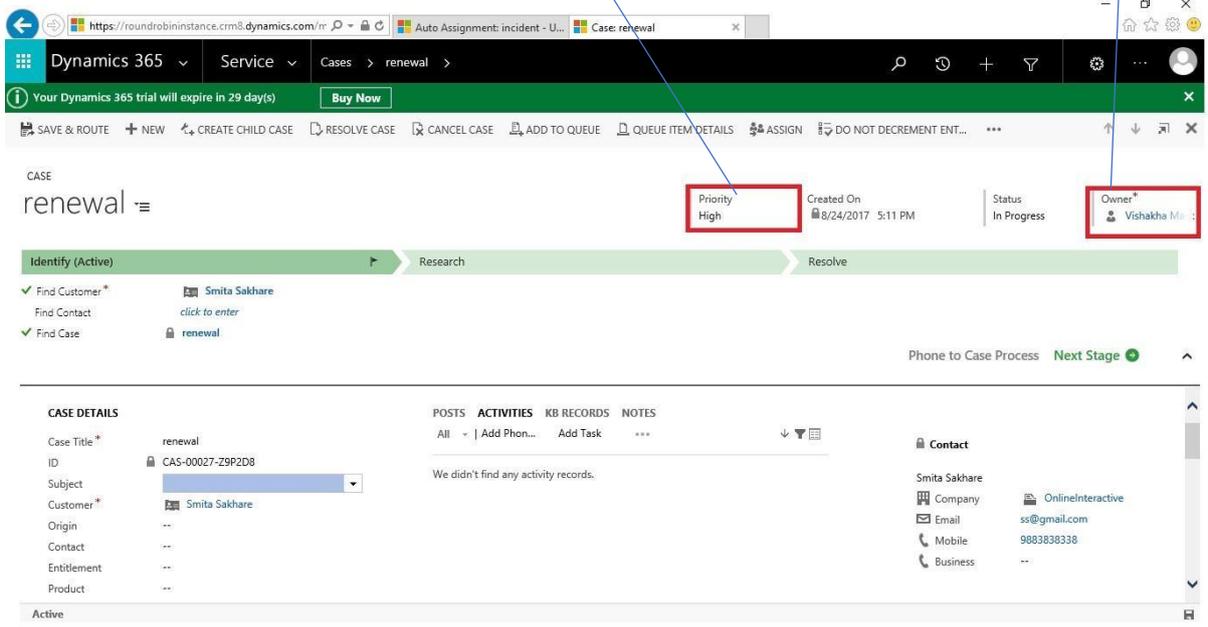
Category Details

**TEST RESULT BASED ON CATEGORY:**

Creation of a case

The category value 'one' has priority high

Assignment works as per the configuration



The screenshot shows the Dynamics 365 Service console interface for a case titled "renewal". The breadcrumb navigation shows "Service > Cases > renewal". The case details include:

- Priority:** High (highlighted with a red box)
- Created On:** 8/24/2017 5:11 PM
- Status:** In Progress
- Owner:** Vishakha M... (highlighted with a red box)

The process flow is shown as: Identify (Active) → Research → Resolve. Under "Identify (Active)", the following steps are listed:

- Find Customer\* (Smita Sakhare) - click to enter
- Find Contact (renewal)
- Find Case (renewal)

The "CASE DETAILS" section shows:

- Case Title: renewal
- ID: CAS-00027-Z9P2D8
- Subject: [Redacted]
- Customer: Smita Sakhare
- Origin: ...
- Contact: ...
- Entitlement: ...
- Product: ...

The "CONTACT" section shows details for Smita Sakhare:

- Company: OnlineInteractive
- Email: ss@gmail.com
- Mobile: 9883838338
- Business: ...