



# DYNAMICS 365 CASE AUTO ASSIGNMENT

This Solution provides simple, efficient and user-friendly shifts management of users by auto assigning cases to users based on the availability.

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## Overview

This Solution provides simple, efficient and user-friendly shifts management of users. This is a one stop solution to auto assign cases to users based on the availability. This solution helps in managing assignment of cases to users in shifts. This assigns cases to the users based upon their availability and number of cases assigned to them. Amongst the users working in a shift, cases will be automatically assigned to user with least number of cases.

## Solution adding/importing

Import the solution as shown in below screenshot.

All Solutions ▾

Name	Display Name	Version	Installed On	Package T...	Publisher	Description
CaseAutoAssignment	Case Auto Assignment	1.0.0.0	4/10/2019	Managed	Microsoft Dynamics	This Solution provides simple, efficient and user...

## Teams

Create a new Team. A queue associated to the team will be created. We can assign the cases to the Team. For auto assignment to work, we need to make some changes in the default queue for the Team.

TEAM ▾

Primary Queue ☰

Default Queue  
<Primary Queue>

General

Team Name \* Primary Queue

Business Unit \* hcl2k19

Administrator \* Test User

Team Type \* Owner

Description

Team members ▾ +

Search for records

Full Name ↑ | Business Unit |

No Users found for this Team. Select Add (+).

## Queues

Open the default queue created for the Team. Update the queue with required "Time zone" and set "Auto Assignment" field to "yes" as shown below.

Shift Management works for the Queue, only when the Auto assignment field is set as "Yes". Now we need to define the shifts for this queue.

QUEUE

<Primary Queue> ☰

Name \* <Primary Queue>

Type \* Private

Incoming Email

Is it a team queue? No

Timezone \* (GMT-08:00) Pacific Time (US & Canada)

Auto assignment Yes

Is Outside Counsel No

Owner \* Primary Queue

Description Primary Queue

MEMBERS

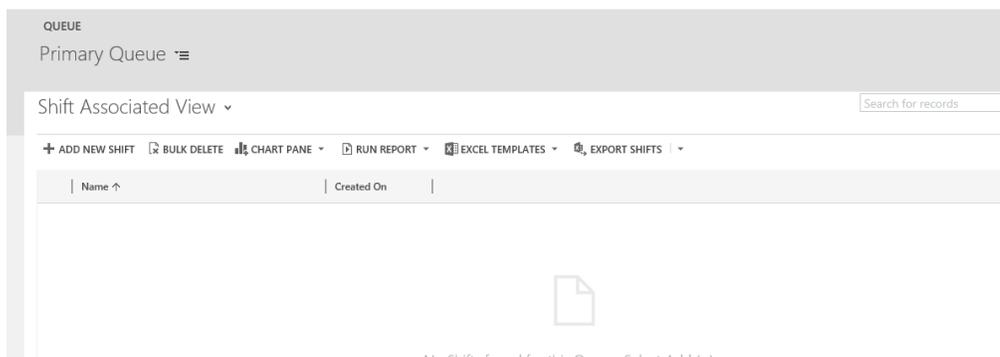
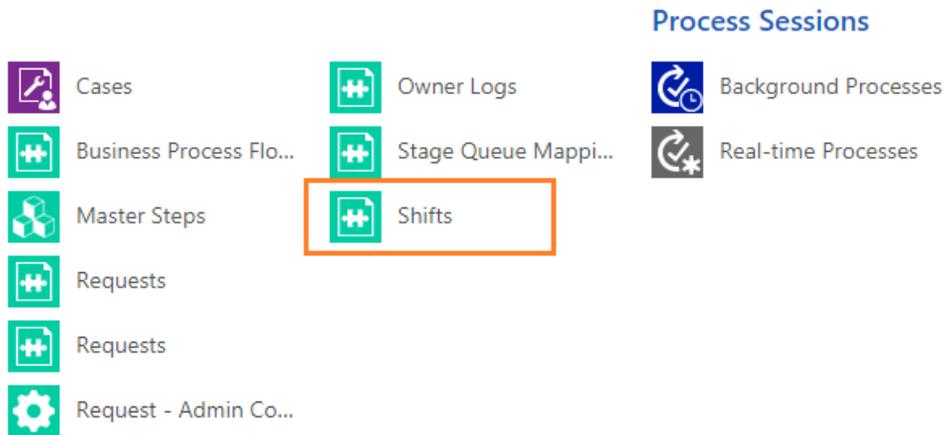
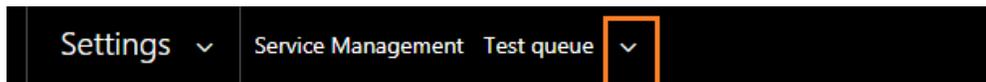
Search for records

Title | Entered Queue ↓ | Worked By |

No records are available in this view.

## Shifts

For a queue we can assign some shifts based on their shift timings. Navigate from the Queue to Shifts to create shifts for a queue as shown below:



Create the shifts with Start Hours and End Hours, which is in 24 hours' format as shown below.

## Shift - A

SHIFT : INFORMATION

Shift A 

### General

Name \* Shift A

Queue \* <Primary Queue>

Owner \*  test user3

Start Hours \* 4 Start Minutes \* 00

End Hours \* 9 End Minutes \* 00

## Shift - B

SHIFT : INFORMATION

Shift B 

### General

Name \* Shift B

Queue \* <Primary Queue>

Owner \*  test user3

Start Hours \* 14 Start Minutes \* 00

End Hours \* 21 End Minutes \* 00

All the Shifts associated to the particular "Primary Queue" is shown below.

QUEUE

<Primary Queue> ☰

Shift Associated View ▾ !

+ ADD NEW SHIFT   BULK DELETE   CHART PANE ▾   RUN REPORT ▾   EXCEL TEMPLATES ▾   EXPORT SHIFTS ▾

<input type="checkbox"/>	Name ↑	Created On
	Shift A	4/29/2019 6:28 ...
	Shift B	4/29/2019 6:30 ...

For a shift we can add some users who will be working in that shift timings. Navigate from the Shift to users to add users for the shifts as shown below.

Dynamics 365 ▾ Shift A ▾ 🔍

Common   Process Sessions

- Users
- Audit History
- Background Processes
- Real-time Processes

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General

Name *	Shift A		
Queue *	<Primary Queue>		
Owner *	test user3		
Start Hours *	4	Start Minutes *	00
End Hours *	9	End Minutes *	00

Click on "Add existing user" button to add users to the shift.

SHIFT : INFORMATION

Shift A

User Associated View

ADD EXISTING USER BULK DELETE CHART PANE RUN REPORT EXCEL TEMPLATES EXPORT USERS

Full Name ↑	Business Unit	Title	Status
Test user1			
test user2			
test user3			

Look Up More Records

3 results

No Users found for this Shift. Select Add (+).

Once the user is added to the shift, navigate to the user record to check if the availability of user is set yes or not. User Availability should be set to "Yes" as shown below as Auto-Assign functionality works for this user only when "Available" field is made "Yes".

USER Test user1

The information provided in this form is viewable by the entire organization.  
This user's information is managed by Office 365. To edit this information visit the User Admin page.

Summary

Account Information

User Name testuser1@hclmay2k19.onmicrosoft.com

User Information

Available Yes

Full Name Test user1

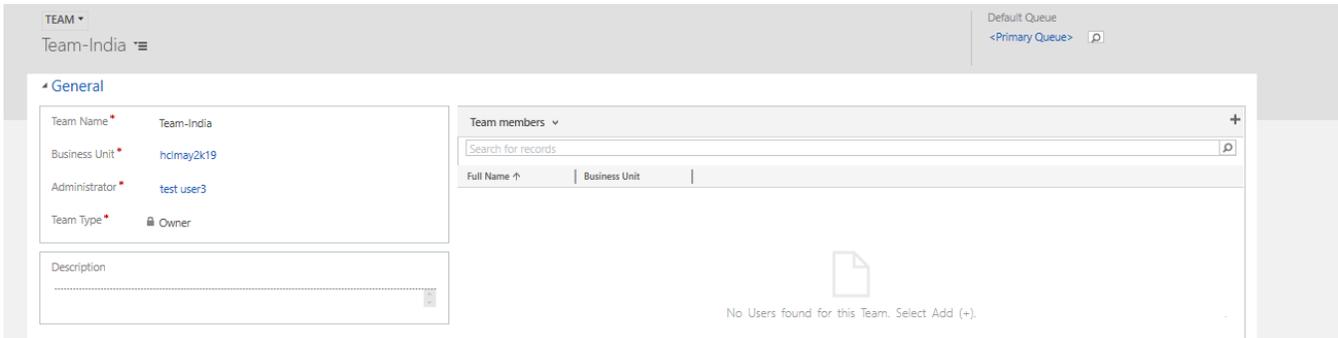
Title

Primary Email testuser1@hclmay2k19.onmicrosoft.com

Mobile Phone

Main Phone

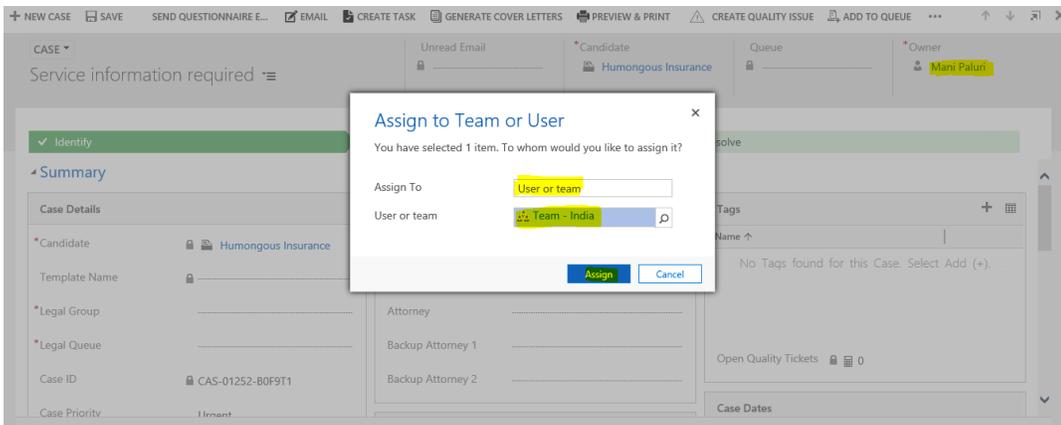
Once the queue and the shifts associated to the queue are created, add the Queue as default queue to a Team as Shown Below. If the queue is already associated with a team, then you can directly assign cases to this team and cases will be assigned to the users in the shifts associated with the queue.



## Auto Assignment

Now Auto Assignment works for the **“Create of Case”** and **“Assign of Case”** as shown below:

Assign Case to a Team as Shown below. Then the case will be automatically assigned to the user who is present in the shifts of the default queue of the team. If multiple users are present in the same shift then, the case will be assigned to the user with a smaller number of cases.



Case is automatically Assigned to the User available in the shift as shown below.

CASE test1

Priority: Normal | Created On: 4/29/2019 6:44 PM | Status: In Progress | Owner: Test user1

Identify (Active) → Research → Resolve

- Find Customer: A. Datum (click to enter)
- Find Contact: test1
- Find Case: test1

Phone to Case Process **Next Stage**

**Summary**

CASE DETAILS	POSTS	ASSISTANT	ACTIVITIES	KB RECORDS	NOTES	CUSTOMER DETAILS
Case Title: test1	Enter post here					A. Datum
ID: CAS-01003-T4XG0						Email: vlauriant@adatum.com

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