Auto Assignment

Date: 28th September 2017

Document Version History

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

Table of Contents

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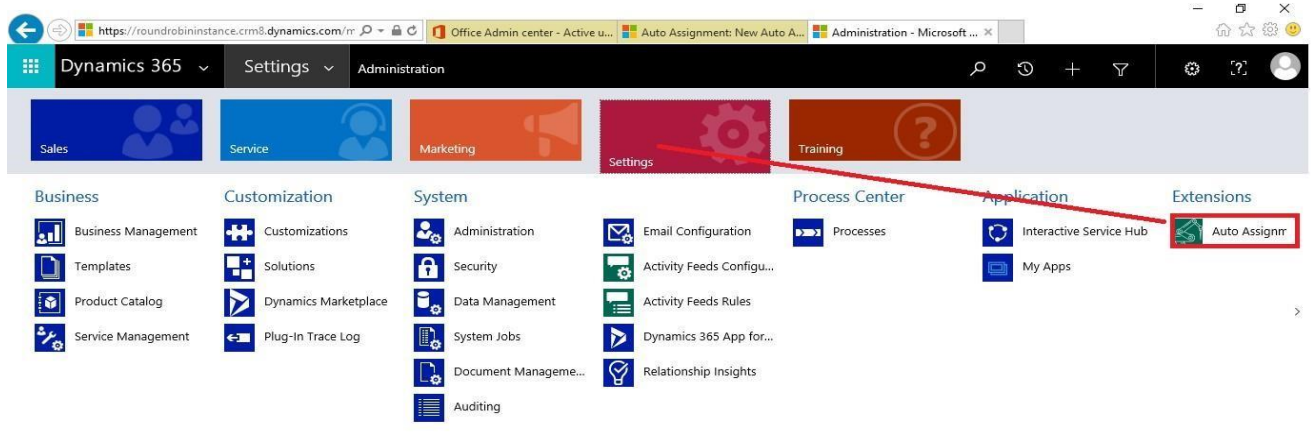
Step 2 - The below snapshot depicts the configuration part for auto assignment. Here the assignment type is categorized into User and Group.

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.

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

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

Click on the +NEW CASE button
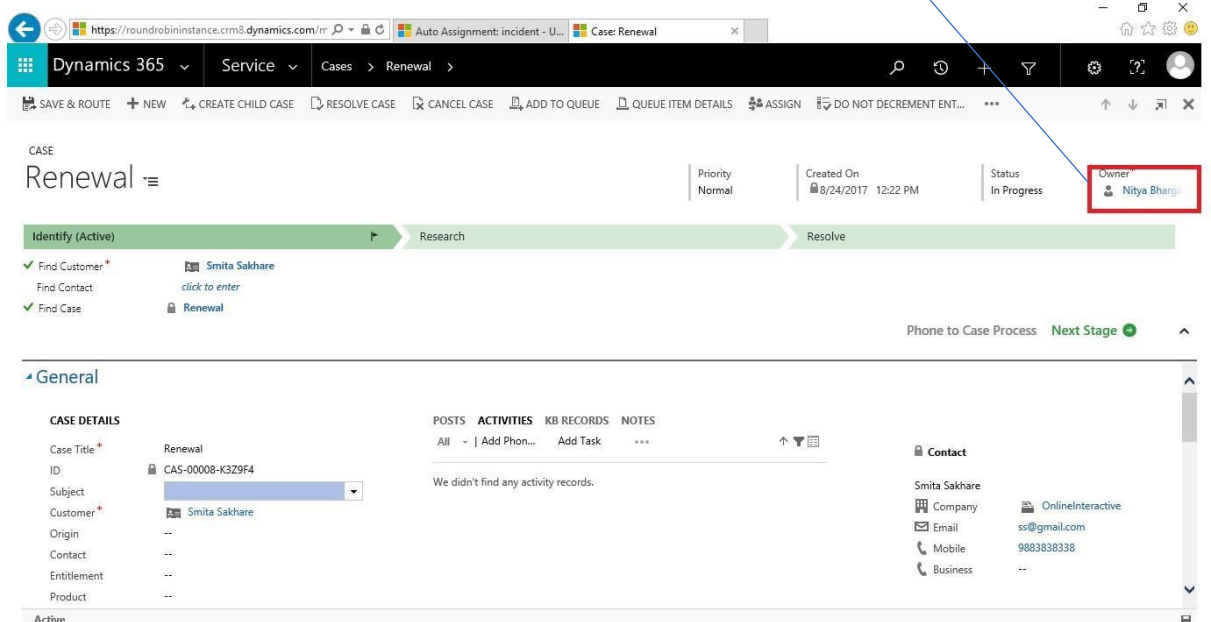
Create a case and save it

As per the configuration the case gets assigned to the user

3. ROUND ROBIN ASSIGNMENT

Scenario 1 -Configuration for round robin

TEST RESULT OF ROUND ROBIN ASSIGNMENT:

Creation of a case

Assignment will happen based on round robin configuration

Assignment Logic

The case count is updated against that user

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

TEST RESULT OF ROUND ROBIN ASSIGNMENT:

Creation of a case

Counter resets

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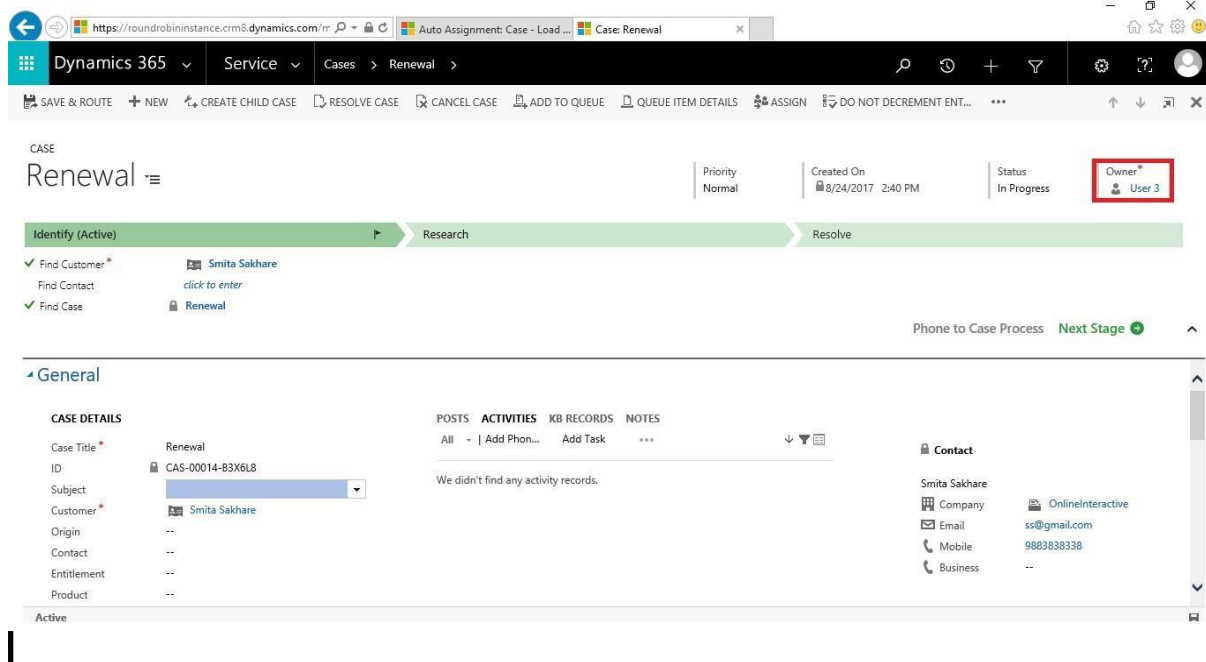
NOTE: Here the round robin configuration can also work for one or more teams.

In such cases, there needs to be made same/different configurations as per the team for the same assignment logic.
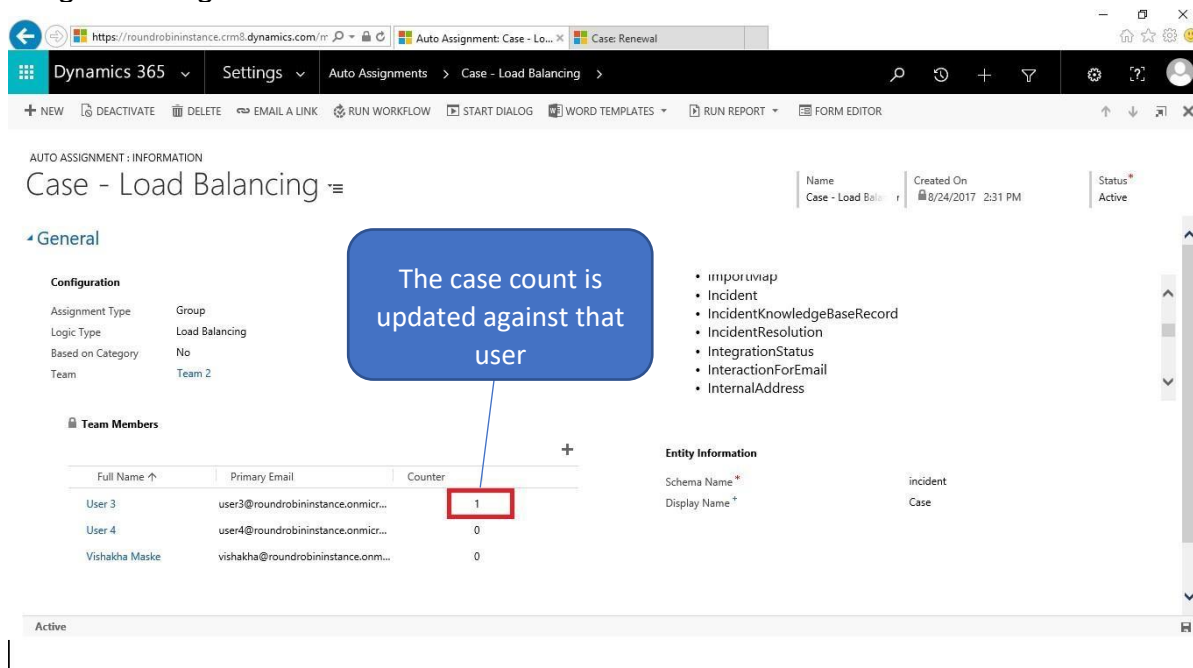
TEST RESULT OF LOAD BALANCING ASSIGNMENT:

Creation of a case

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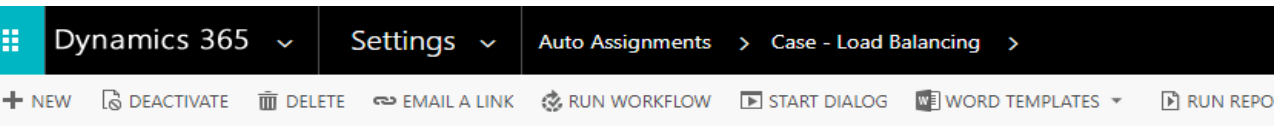
Scenario 2 – When the case counter is same for all the users.

TEST RESULT OF LOAD BALANCING ASSIGNMENT:

Creation of a case

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

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.
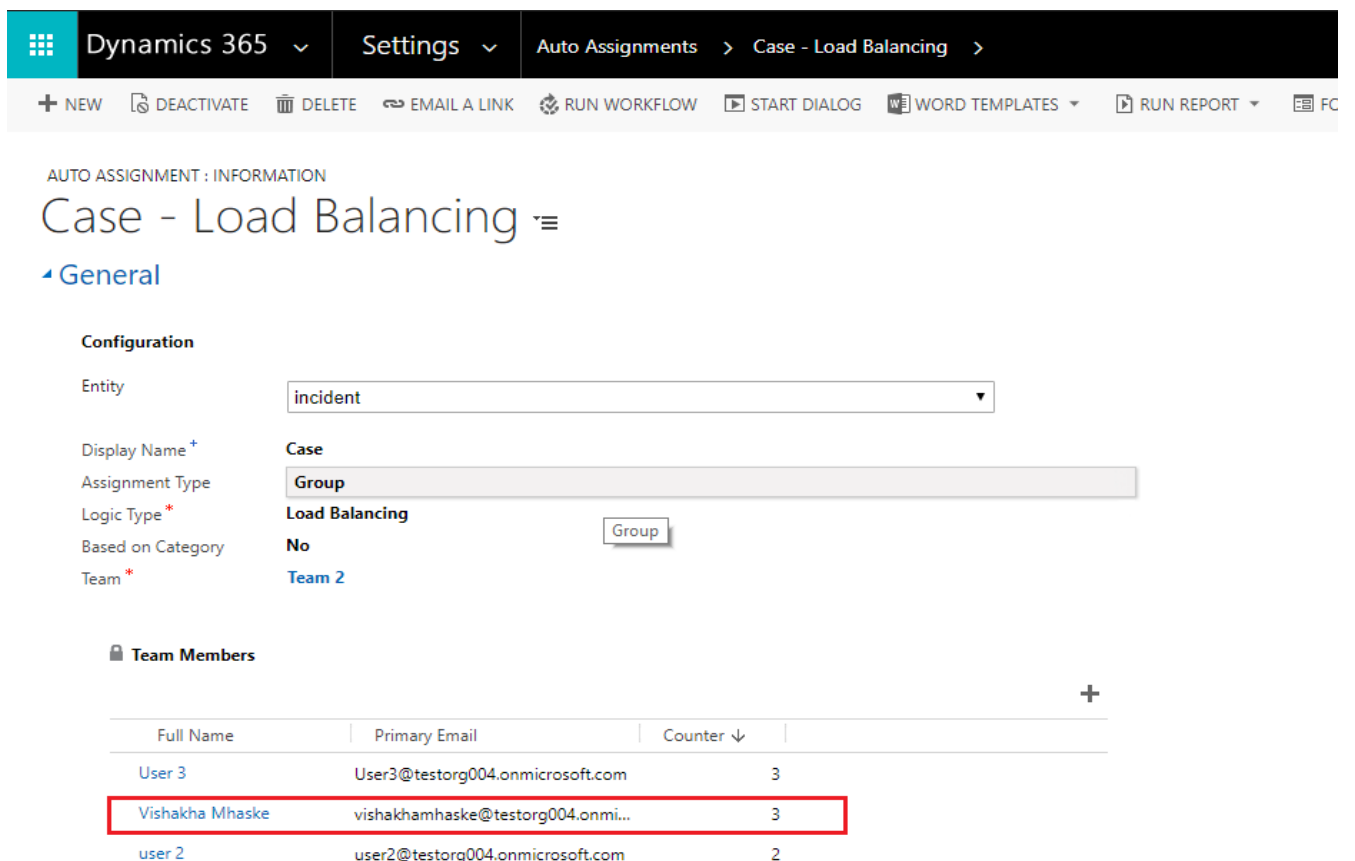
TEST RESULT OF LOAD BALANCING ASSIGNMENT:

Creation of a case

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

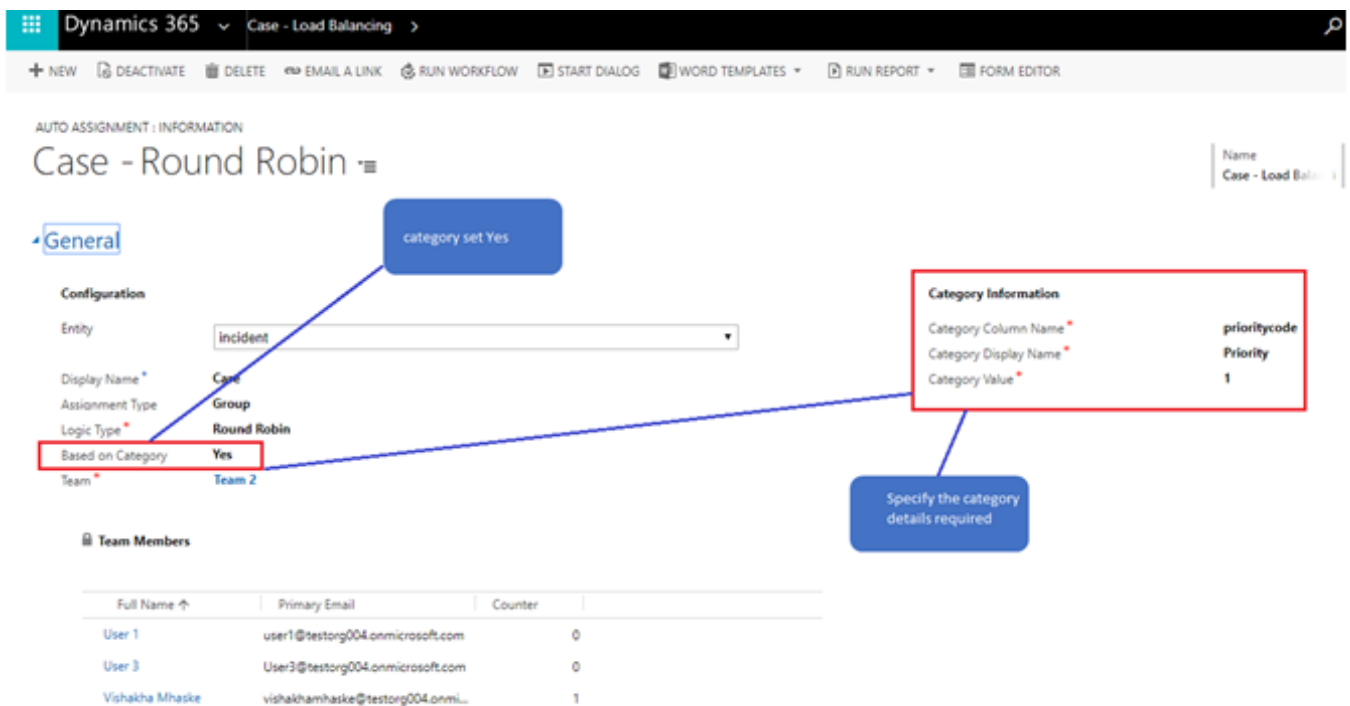## 5. ASSIGNMENT USING ROUND ROBIN/LOAD BALANCING BASED ON CATEGORY

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

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

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

TEST RESULT OF LOAD BALANCING ASSIGNMENT BASED ON CATEGORY:

Creation of a case

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
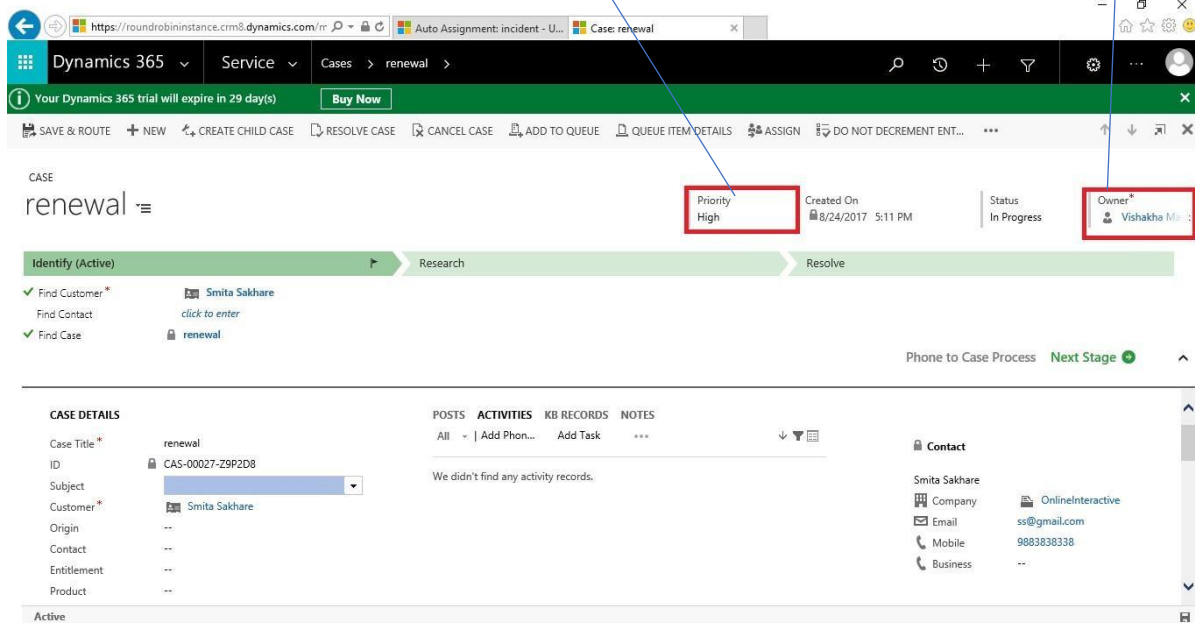
Category set YES and user is mapped

Category Details

TEST RESULT BASED ON CATEGORY:

Creation of a case

The category value 'one' has priority high

Assignment works as per the configuration