



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

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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.

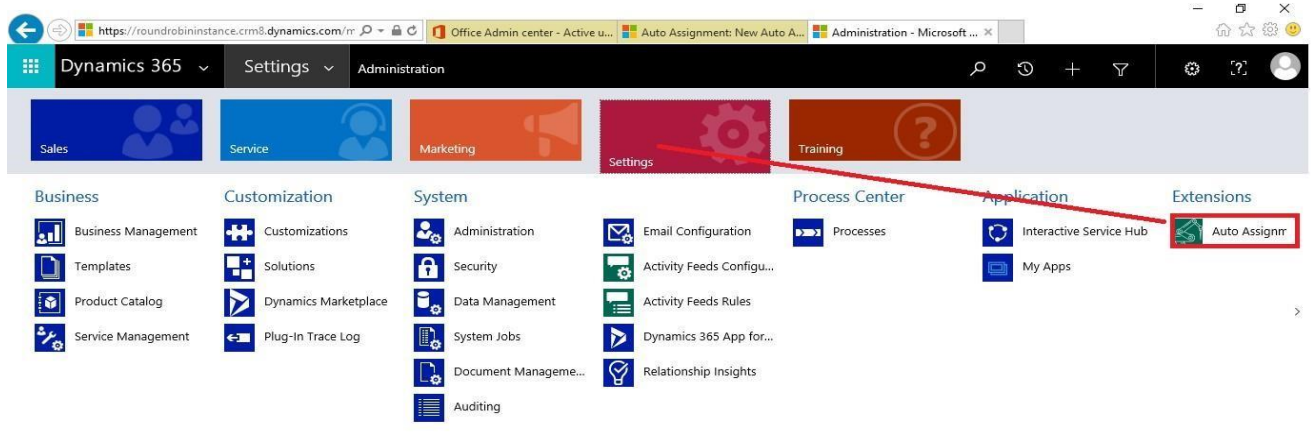
It illustrates the assignment logic as below:

- 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

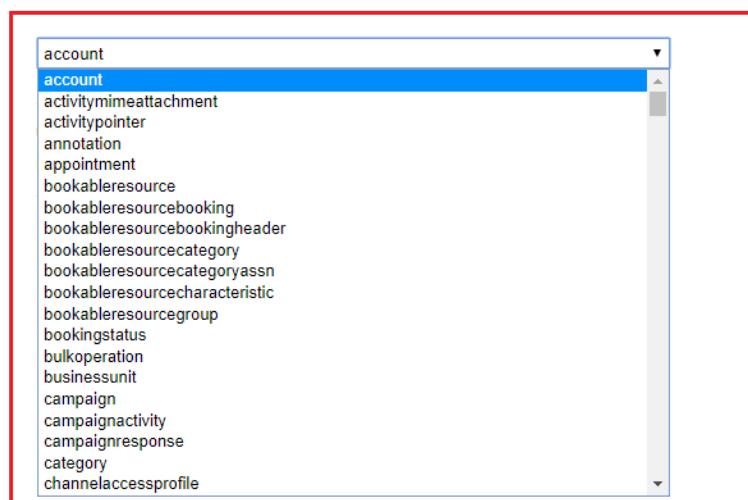
Entity

Display Name 

Assignment Type

Based on Category

User *



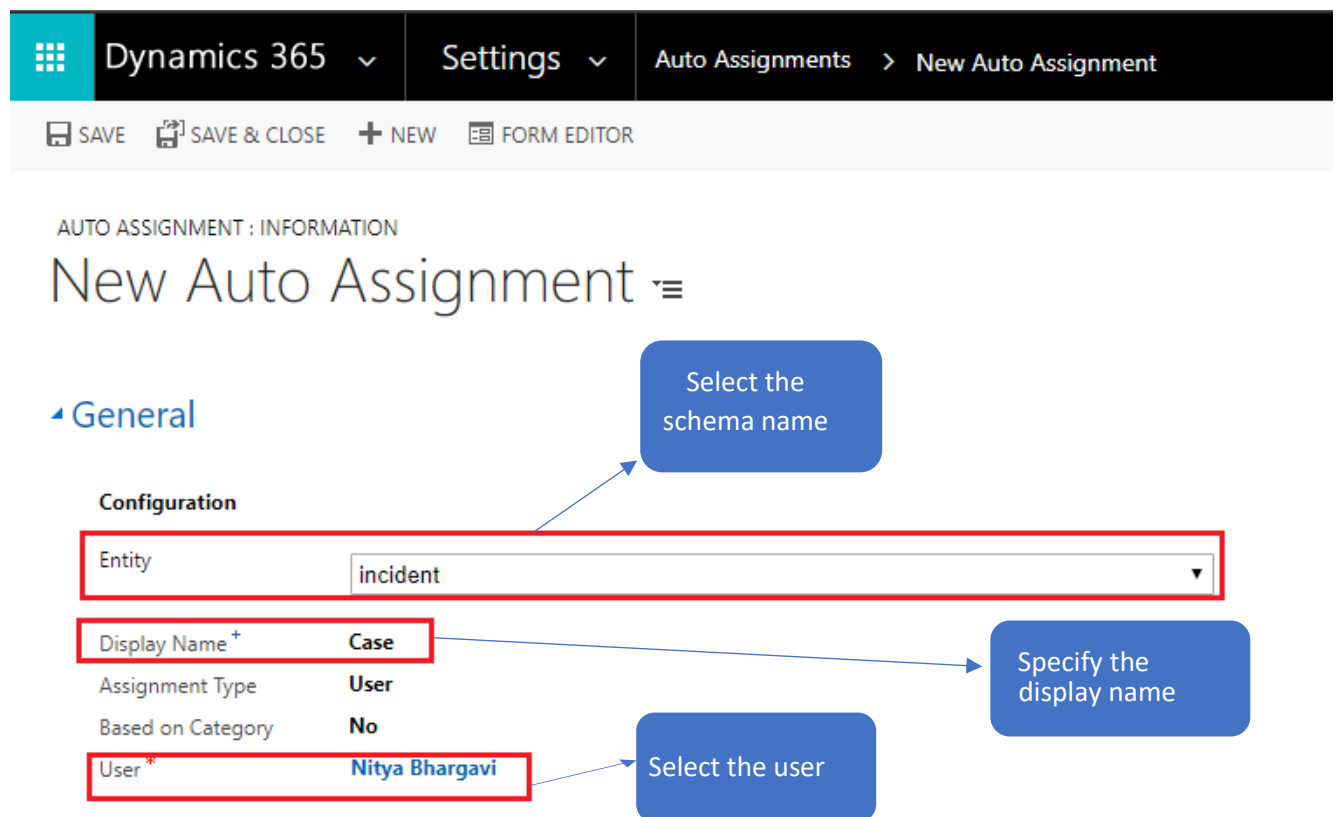
A dropdown menu showing a list of entities. The 'account' entity is selected and highlighted in blue. The list includes: account, activitimimeattachment, activitypointer, annotation, appointment, bookableresource, bookableresourcebooking, bookableresourcebookingheader, bookableresourcecategory, bookableresourcecategoryassn, bookableresourcecharacteristic, bookableresourcegroup, bookingstatus, bulkoperation, businessunit, campaign, campaignactivity, campaignresponse, category, and channelaccessprofile.

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



The screenshot shows the Dynamics 365 interface for creating a new auto-assignment. The breadcrumb trail is: Dynamics 365 > Settings > Auto Assignments > New Auto Assignment. The top bar includes buttons for SAVE, SAVE & CLOSE, NEW, and FORM EDITOR. The main heading is 'New Auto Assignment'. Under the 'General' tab, the 'Configuration' section contains the following fields:

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

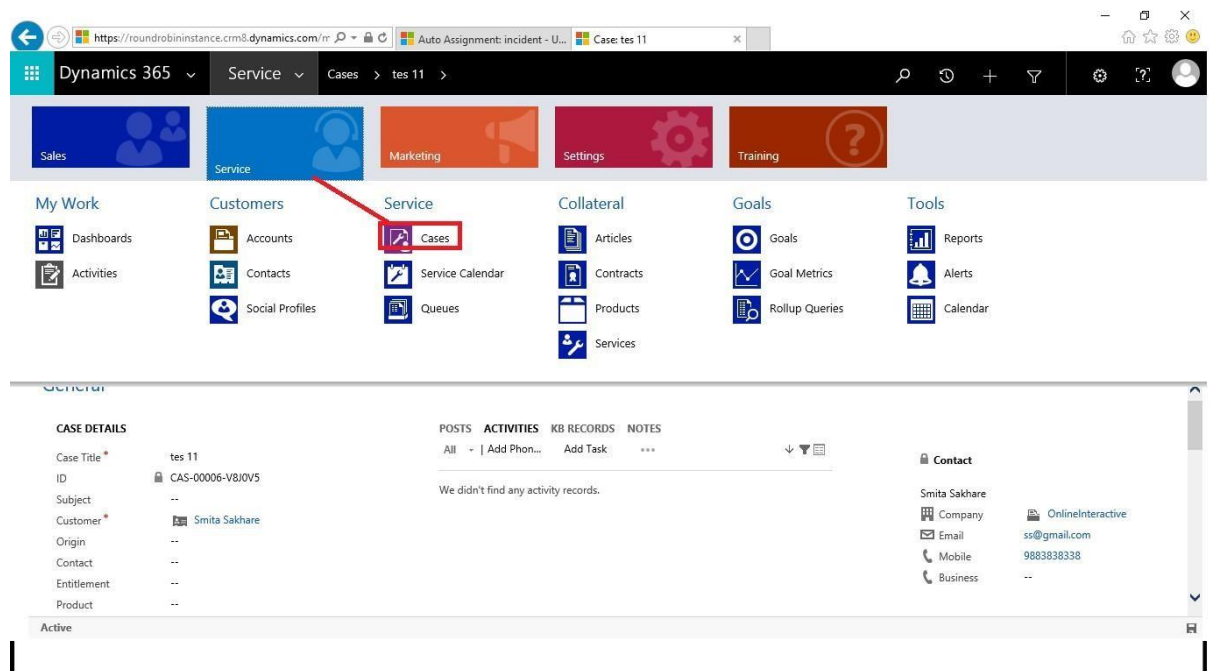
Annotations with arrows point to specific fields:

- An arrow points from the 'Entity' field to a blue box labeled 'Select the schema name'.
- An arrow points from the 'Display Name' field to a blue box labeled 'Specify the display name'.
- An arrow points from the 'User' field to a blue box labeled '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



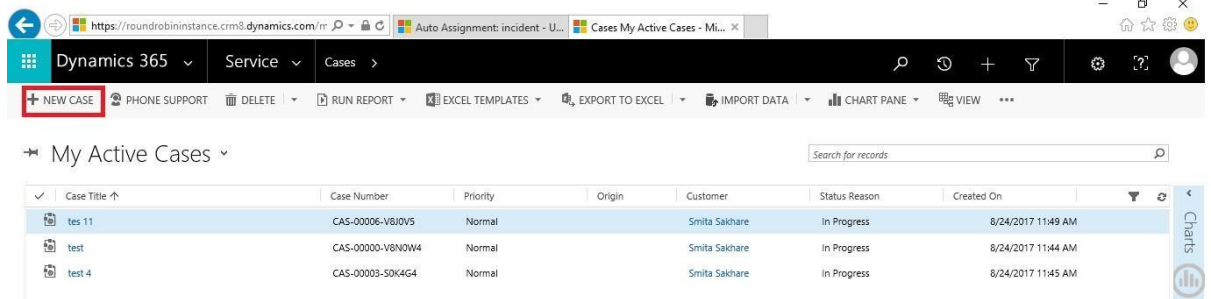
The screenshot shows the Dynamics 365 Service Cases page. The breadcrumb navigation is "Dynamics 365 > Service > Cases > tes 11". The left sidebar shows the "Service" menu item highlighted, with a red box around the "Cases" sub-item. The main content area displays the "CASE DETAILS" for "tes 11" (ID: CAS-00006-V8J0V5) assigned to "Smita Sakhare". The "ACTIVITIES" tab is selected, showing no activity records. The contact information for Smita Sakhare is displayed on the right.

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

Click on the +NEW CASE button

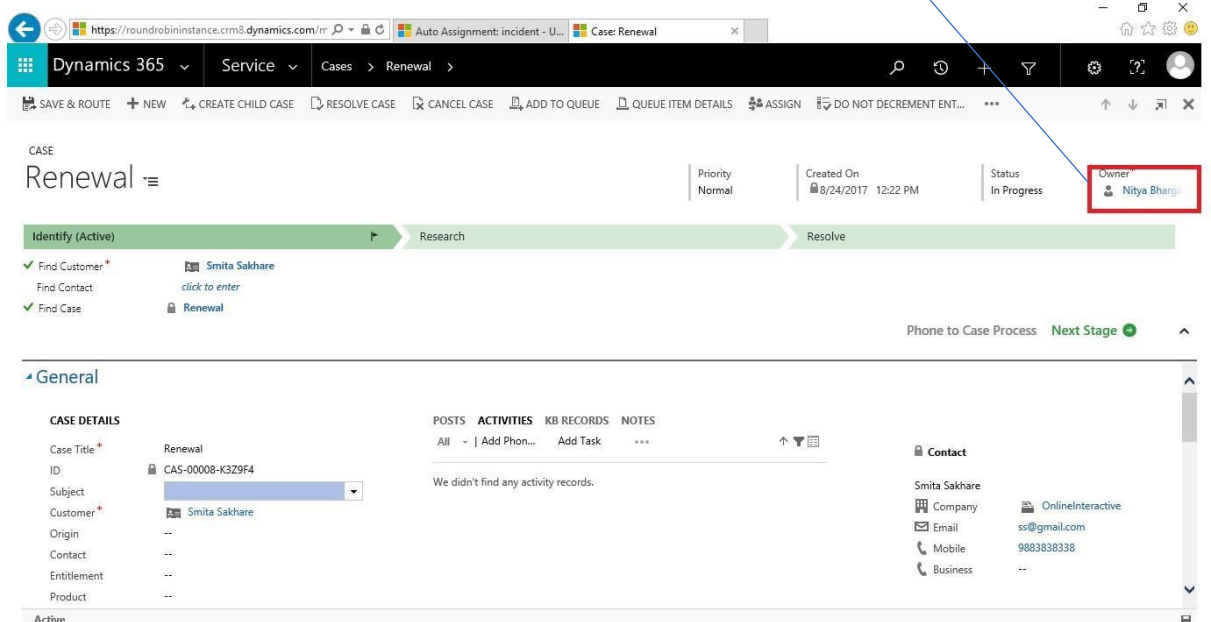


The screenshot shows the Dynamics 365 Service Cases page. The '+ NEW CASE' button is highlighted with a red box. The page displays a table of active cases:

Case Title	Case Number	Priority	Origin	Customer	Status Reason	Created On
tes 11	CAS-00006-V8IOV5	Normal		Smita Sakhare	In Progress	8/24/2017 11:49 AM
test	CAS-00000-V8NOW4	Normal		Smita Sakhare	In Progress	8/24/2017 11:44 AM
test 4	CAS-00003-SOK4G4	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



The screenshot shows the Dynamics 365 Case: Renewal page. The 'Owner' field is highlighted with a red box and labeled 'Nitya Bhargava'. The page displays the case details and the 'Identify (Active)' stage.

Case Details:

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

Case Status:

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

Identify (Active) Stage:

- Find Customer: Smita Sakhare
- Find Contact: click to enter
- Find Case: Renewal

General Section:

- Case Details: Renewal
- ID: CAS-00008-K3Z9F4
- Subject: Smita Sakhare
- Customer: Smita Sakhare
- Origin: ...
- Contact: ...
- Entitlement: ...
- Product: ...

Posts, Activities, KB Records, Notes:

- Posts: All | Add Phon... | Add Task | ...
- Activities: We didn't find any activity records.
- KB Records: ...
- Notes: ...

Contact Information:

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

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

incident

Select Schema
Name of Entity

Display Name⁺

Case

Assignment Type

Group

Assignment
Type Group

Logic Type^{*}

Round Robin

Based on Category

No

Team^{*}

Team B

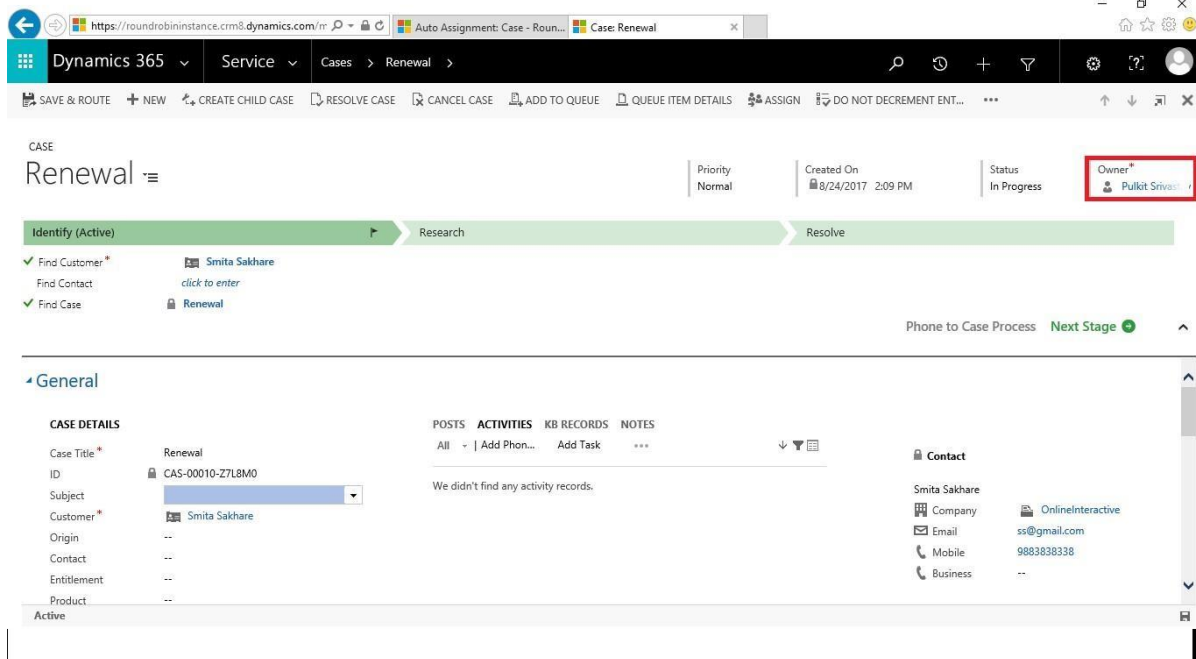
Team Members

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

TEST RESULT OF ROUND ROBIN ASSIGNMENT:

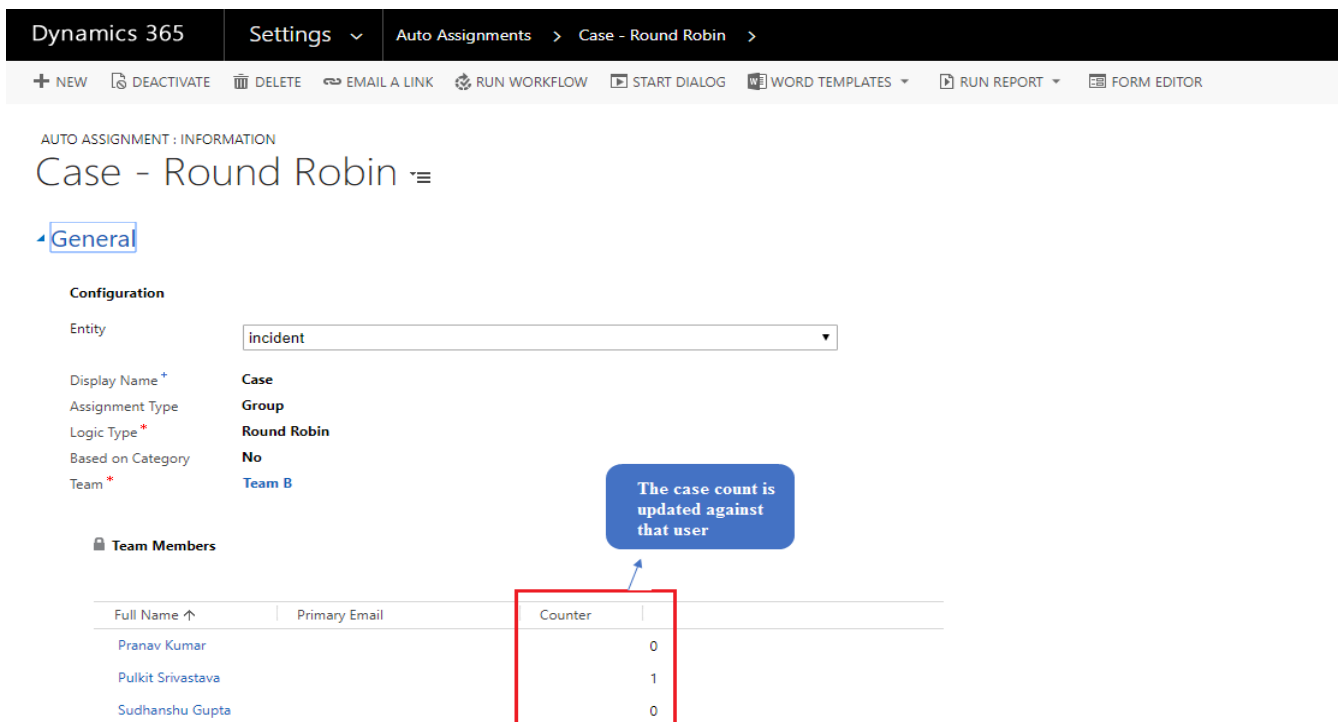
Creation of a case

Assignment will happen based on round robin configuration



The screenshot shows the Dynamics 365 interface for a case titled "Renewal". The case is assigned to "Pulkit Srivastava" as the owner. The process flow includes "Identify (Active)", "Research", and "Resolve". The "General" tab is selected, showing case details and contact information for Smita Sakhare.

Assignment Logic



The screenshot shows the "Auto Assignments: Case - Round Robin" configuration page. The configuration is set for "Incident" entity, "Case" display name, "Group" assignment type, "Round Robin" logic type, and "Team B". The "Team Members" table shows the case count for each user.

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

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.

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
incident

Display Name
Case

Assignment Type
Group

Logic Type
Round Robin

Based on Category
No

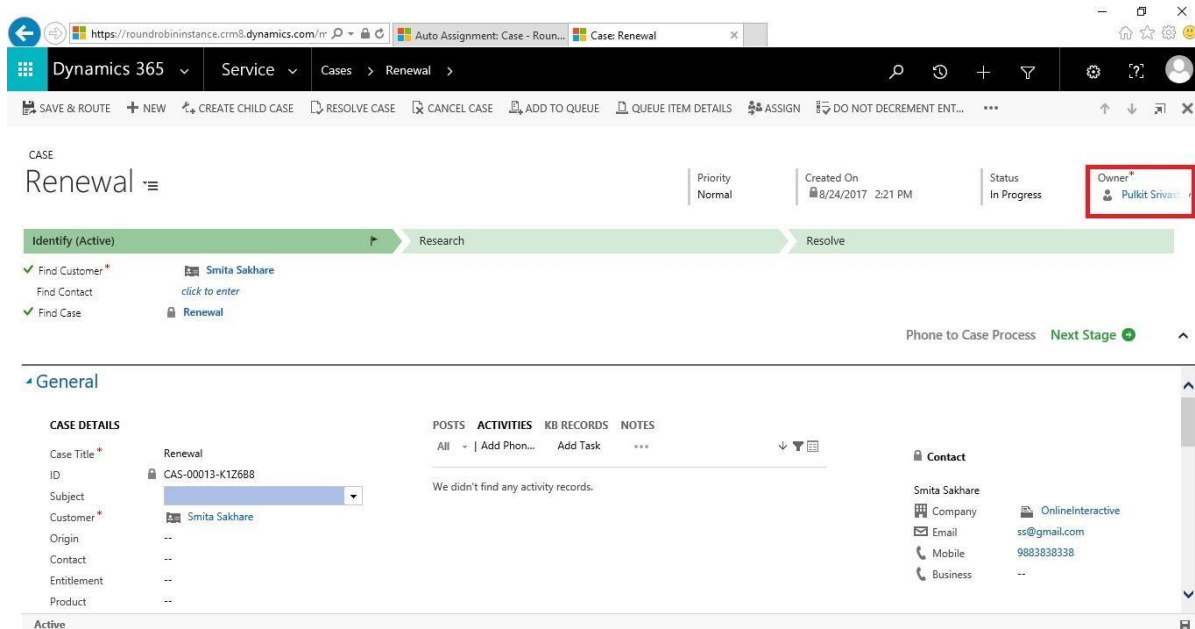
Team
Team B

Team Members

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

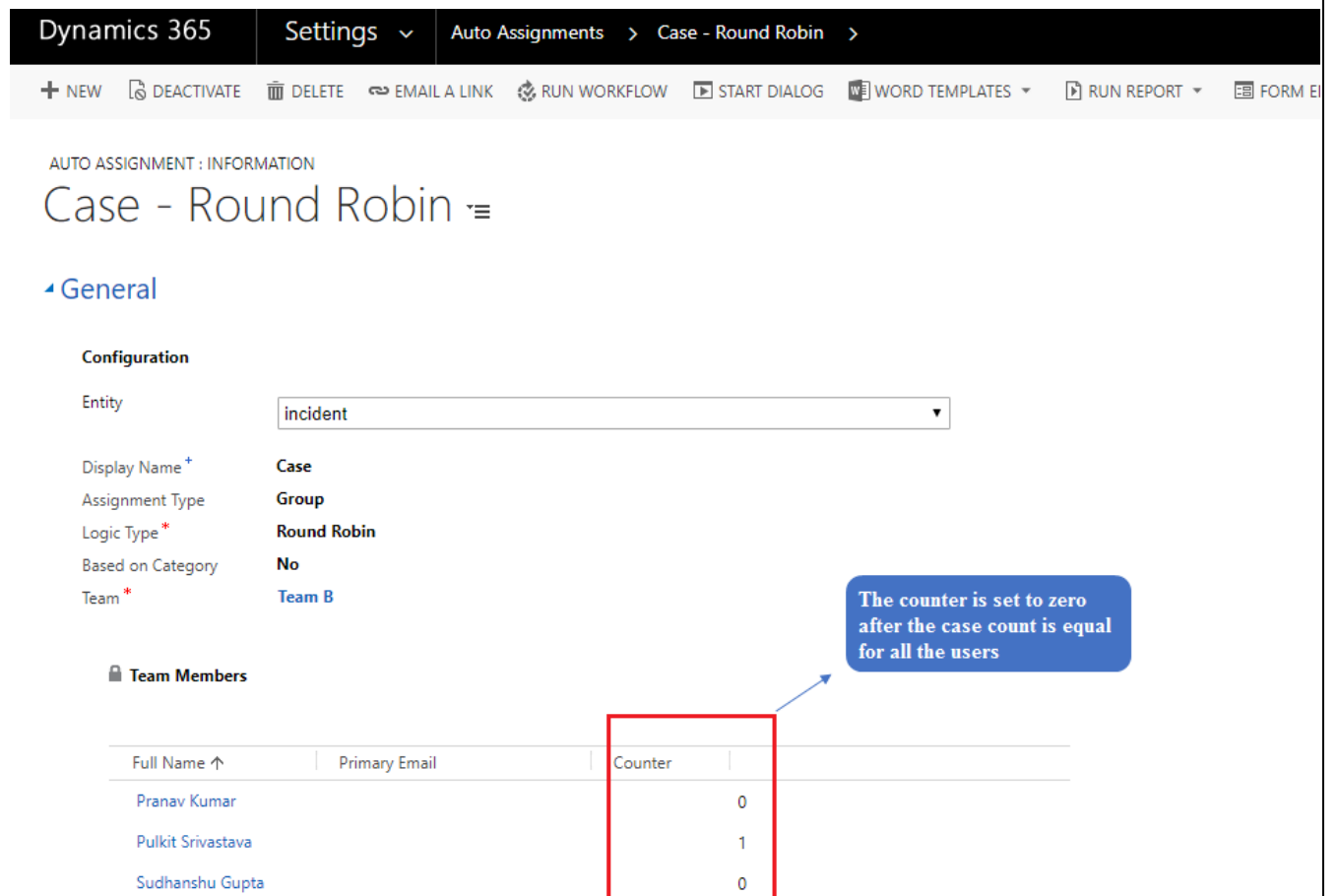
TEST RESULT OF ROUND ROBIN ASSIGNMENT:

Creation of a case



The screenshot shows the Dynamics 365 interface for a 'Case: Renewal'. The top navigation bar includes 'Dynamics 365', 'Service', 'Cases', and 'Renewal'. The main header displays 'CASE Renewal' with fields for 'Priority: Normal', 'Created On: 8/24/2017 2:21 PM', 'Status: In Progress', and 'Owner: Pulkit Srivastava' (highlighted with a red box). Below the header is a process flow: 'Identify (Active)' → 'Research' → 'Resolve'. The 'Identify (Active)' step shows 'Find Customer' (Smita Sakhare), 'Find Contact' (click to enter), and 'Find Case' (Renewal). The 'General' tab is active, showing 'CASE DETAILS' with fields for Case Title, ID (CAS-00013-K1Z688), Subject, Customer (Smita Sakhare), Origin, Contact, Entitlement, and Product. The 'CONTACT' section lists Smita Sakhare with details for Company, Email (ss@gmail.com), Mobile (9883838338), and Business. The 'Active' status is shown at the bottom.

Counter resets



The screenshot shows the Dynamics 365 'Case - Round Robin' configuration page. The top navigation bar includes 'Dynamics 365', 'Settings', 'Auto Assignments', and 'Case - Round Robin'. The main header displays 'AUTO ASSIGNMENT : INFORMATION Case - Round Robin'. The 'General' tab is active, showing 'Configuration' with fields for 'Entity' (incident), 'Display Name' (Case), 'Assignment Type' (Group), 'Logic Type' (Round Robin), 'Based on Category' (No), and 'Team' (Team B). The 'Team Members' section shows a table with columns 'Full Name', 'Primary Email', and 'Counter'. The table lists three team members: Pranav Kumar (Counter: 0), Pulkit Srivastava (Counter: 1), and Sudhanshu Gupta (Counter: 0). A red box highlights the 'Counter' column, and a blue callout box points to it with the text: '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** >

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

AUTO ASSIGNMENT : INFORMATION

Case - Load Balancing ▾

General

Configuration

Entity

Display Name ⁺ **Case**

Assignment Type **Group**

Logic Type ^{*} **Load Balancing** → LogicType is Load Balancing

Based on Category **No**

Team ^{*} **Team 2**

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

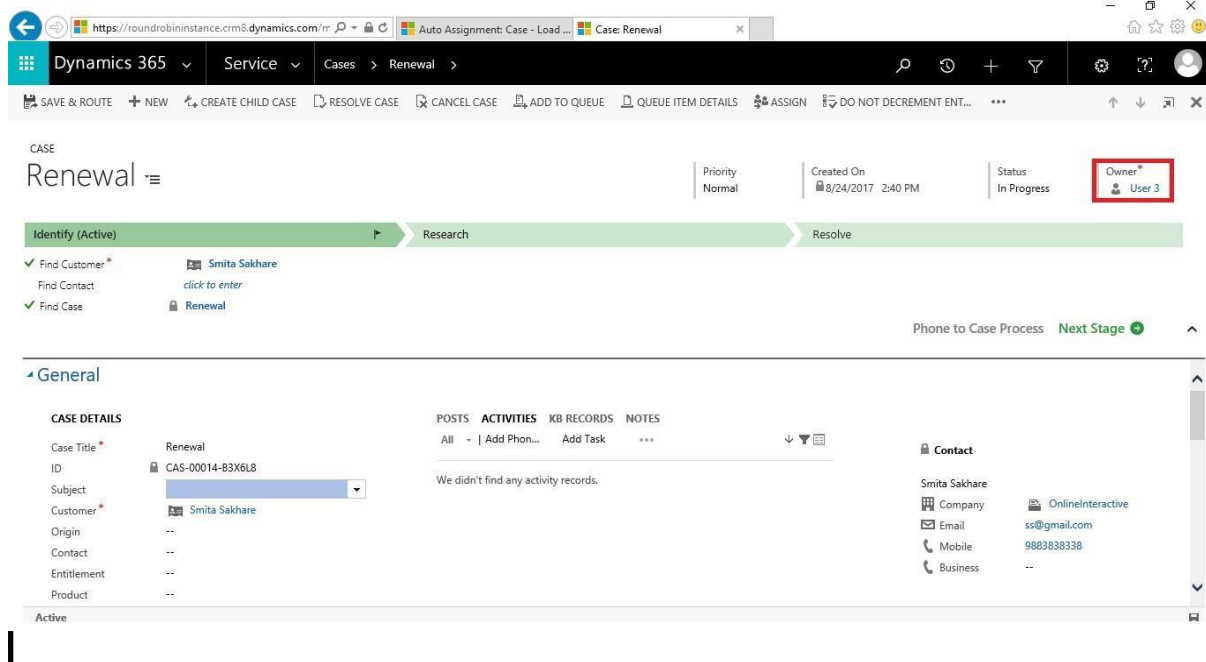
The counter will be set to zero only once

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.

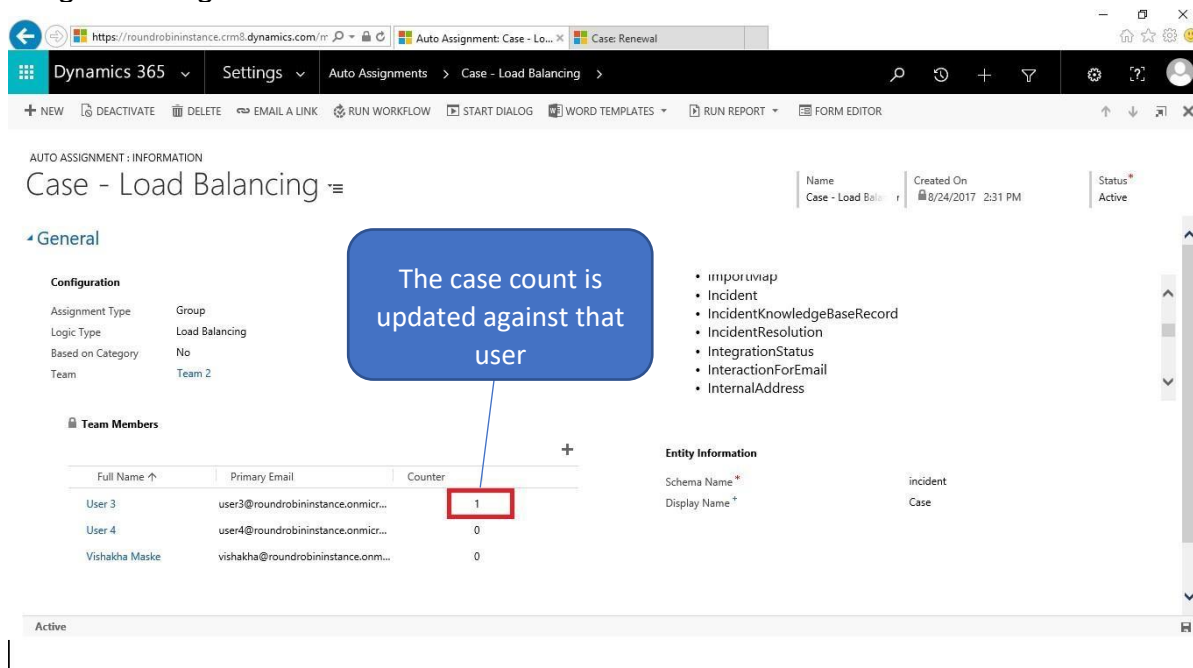
TEST RESULT OF LOAD BALANCING ASSIGNMENT:

Creation of a case



The screenshot shows the Dynamics 365 interface for a 'Case: Renewal'. The top navigation bar includes 'Dynamics 365', 'Service', and 'Cases > Renewal'. The main header displays 'CASE Renewal' with fields for 'Priority: Normal', 'Created On: 8/24/2017 2:40 PM', 'Status: In Progress', and 'Owner: User 3' (highlighted with a red box). Below the header is a process bar with 'Identify (Active)', 'Research', and 'Resolve' stages. The 'Identify (Active)' stage shows a list of actions: 'Find Customer' (Smita Sakhare), 'Find Contact' (click to enter), and 'Find Case' (Renewal). The 'General' section contains 'CASE DETAILS' (Case Title: Renewal, ID: CAS-00014-83X6L8, Subject: Smita Sakhare, Customer: Smita Sakhare, Origin: --, Contact: --, Entitlement: --, Product: --) and 'CONTACT' information (Smita Sakhare, Company: OnlineInteractive, Email: ss@gmail.com, Mobile: 9883838338, Business: --). The 'Active' status is indicated at the bottom.


Assignment Logic



The screenshot shows the Dynamics 365 interface for 'Case - Load Balancing'. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Auto Assignments > Case - Load Balancing'. The main header displays 'AUTO ASSIGNMENT: INFORMATION Case - Load Balancing' with fields for 'Name: Case - Load Balancing', 'Created On: 8/24/2017 2:31 PM', and 'Status: Active'. The 'General' section contains 'Configuration' (Assignment Type: Group, Logic Type: Load Balancing, Based on Category: No, Team: Team 2) and 'Team Members' (User 3, User 4, Vishakha Maske). A blue callout box points to the 'Counter' column in the 'Team Members' table, stating 'The case count is updated against that user'. The 'Entity Information' section shows 'Schema Name: incident' and 'Display Name: Case'. The 'Active' status is indicated at the bottom.

Full Name	Primary Email	Counter
User 3	user3@roundrobininstance.onmicr...	1
User 4	user4@roundrobininstance.onmicr...	0
Vishakha Maske	vishakha@roundrobininstance.onmicr...	0

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

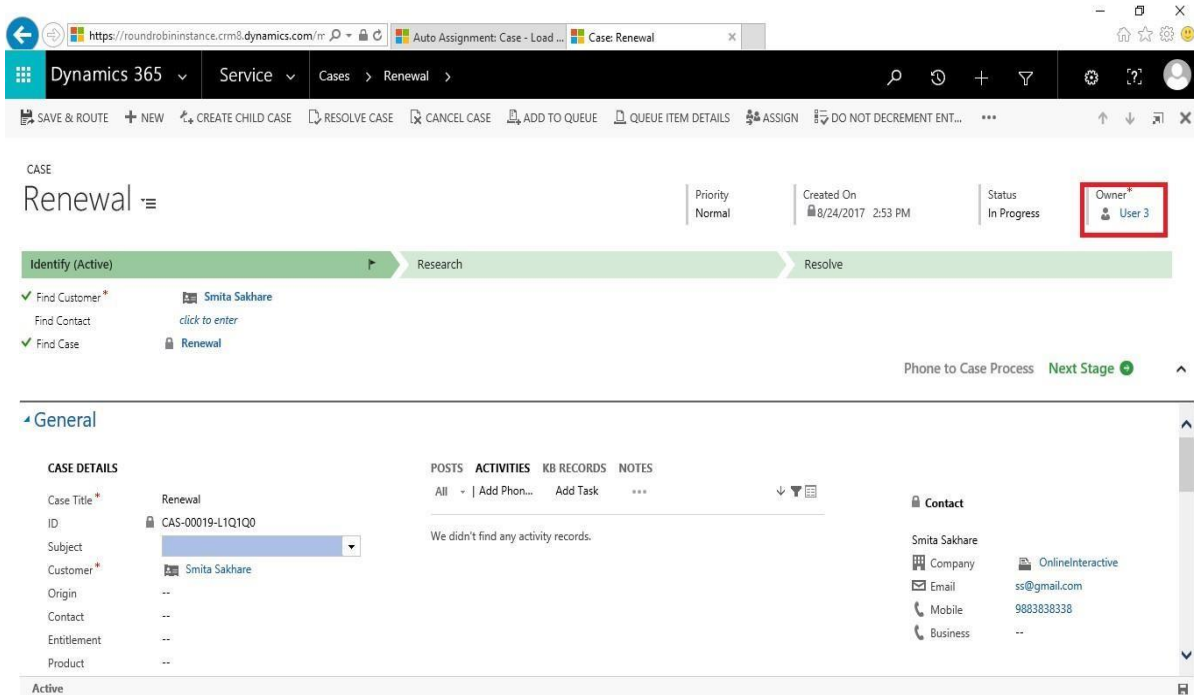
Team Members

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	

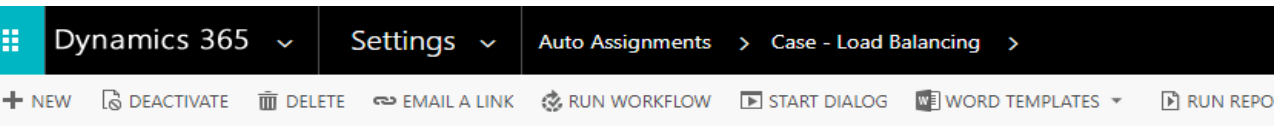
The counter is same for all the users

TEST RESULT OF LOAD BALANCING ASSIGNMENT:

Creation of a case



The screenshot shows the Dynamics 365 interface for a case titled "Renewal". The case is assigned to "User 3" as the owner. The process flow includes "Identify (Active)", "Research", and "Resolve". The "General" tab is selected, showing case details such as ID (CAS-00019-L1Q1Q0), subject, customer (Smita Sakhare), and contact information. The "Contact" section lists Smita Sakhare with email ss@gmail.com and mobile number 9883838338.



The screenshot shows the Dynamics 365 interface for "Auto Assignments: Case - Load Balancing". The "Configuration" section is visible, showing settings for the assignment rule. The "Entity" is set to "incident", and the "Team" is set to "Team 2".

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


Display Name ⁺ **Case**


Assignment Type **Group**

Logic Type ^{*} **Load Balancing**

Based on Category **No**

Team ^{*} **Team 2**

 **Team Members**



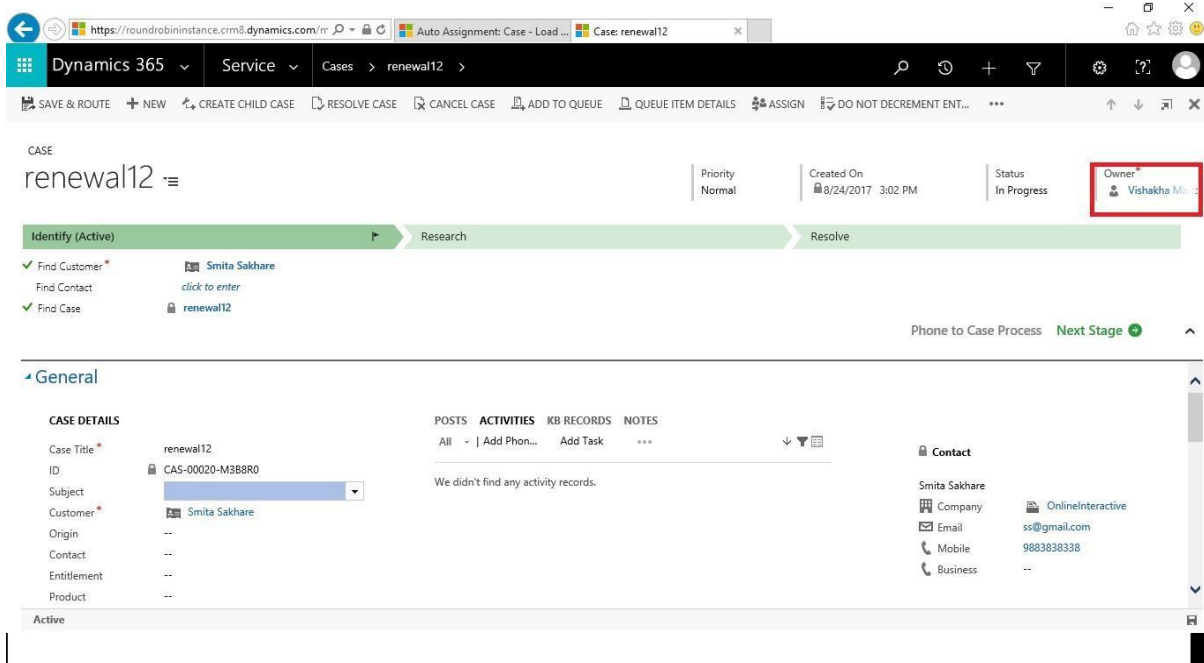
Full Name	Primary Email	Counter ↓
User 3	User3@testorg004.onmicrosoft.com	3
user 2	user2@testorg004.onmicrosoft.com	2
Vishakha Mhaske	vishakhamhaske@testorg004.onmi...	2

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:

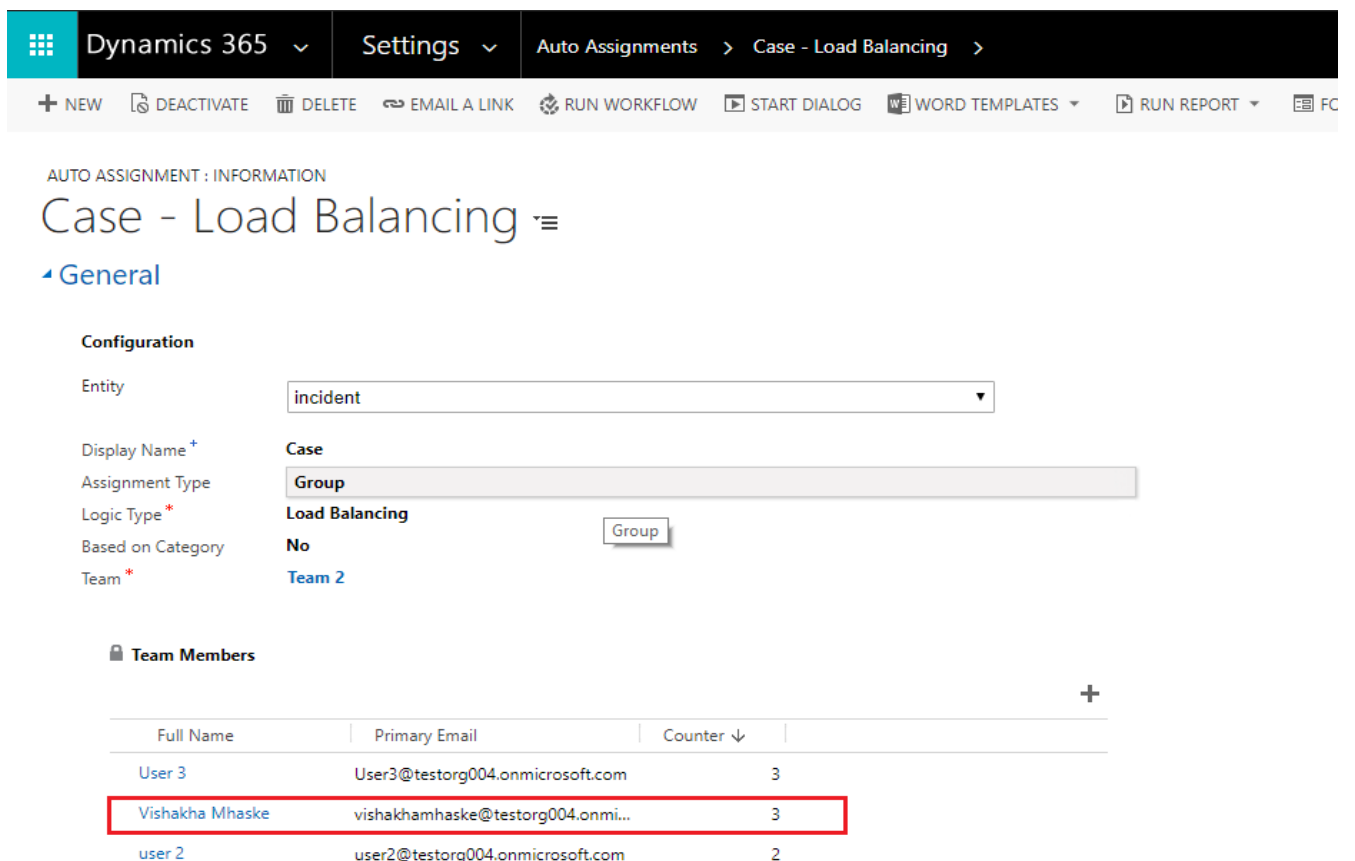
Creation of a case



The screenshot shows the Dynamics 365 interface for a case named 'renewal12'. The case is in the 'Identify (Active)' stage. The 'Owner' field is highlighted with a red box, showing 'Vishakha Mhaske'. The 'General' tab is selected, displaying case details and contact information for Smita Sakhare.

Field	Value
Case Title	renewal12
ID	CAS-00020-M3B8R0
Subject	
Customer	Smita Sakhare
Origin	
Contact	
Entitlement	
Product	
Activity	Active

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



The screenshot shows the Dynamics 365 'Auto Assignments' configuration for 'Case - Load Balancing'. The 'Configuration' section shows the entity as 'incident', display name as 'Case', assignment type as 'Group', logic type as 'No', and team as 'Team 2'. The 'Team Members' section shows a table of users and their record counts.

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

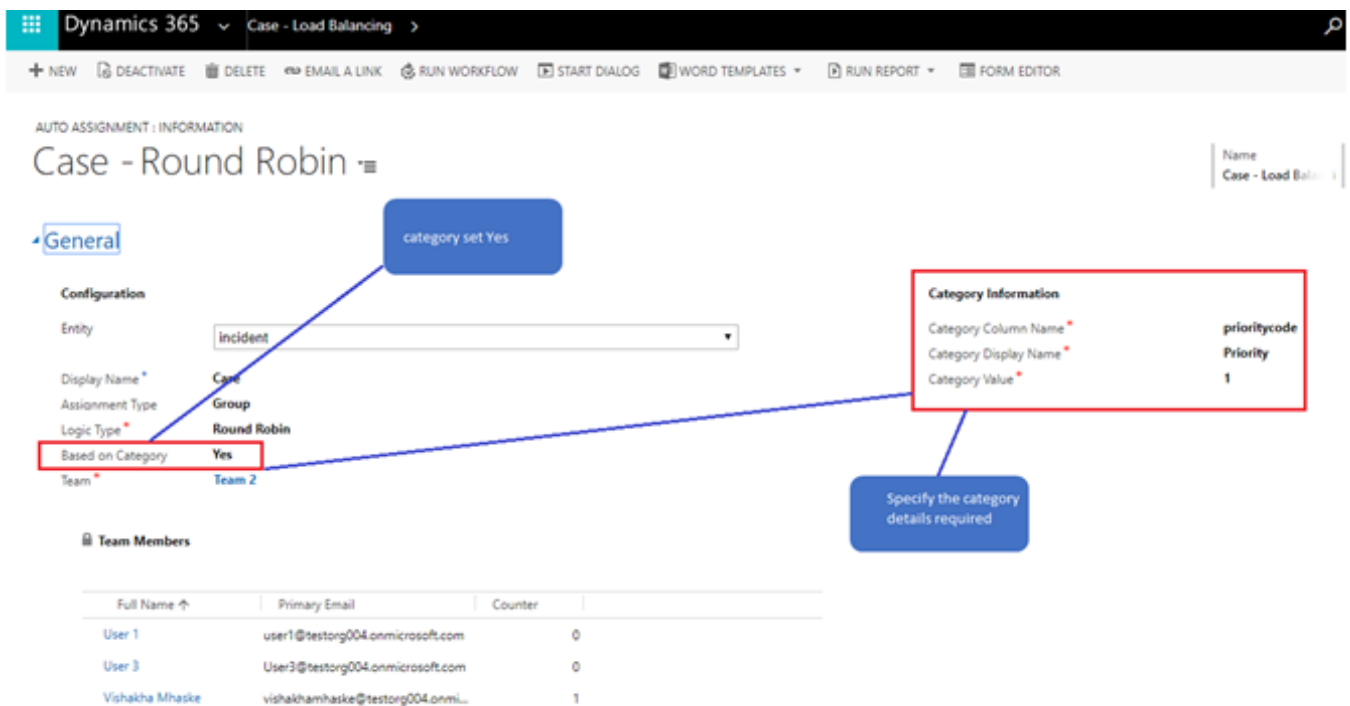
a.) Assignment of the records using Round Robin based on category

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



Category Information

Category Column Name	Category Display Name	Category Value
prioritycode	Priority	1

Team Members

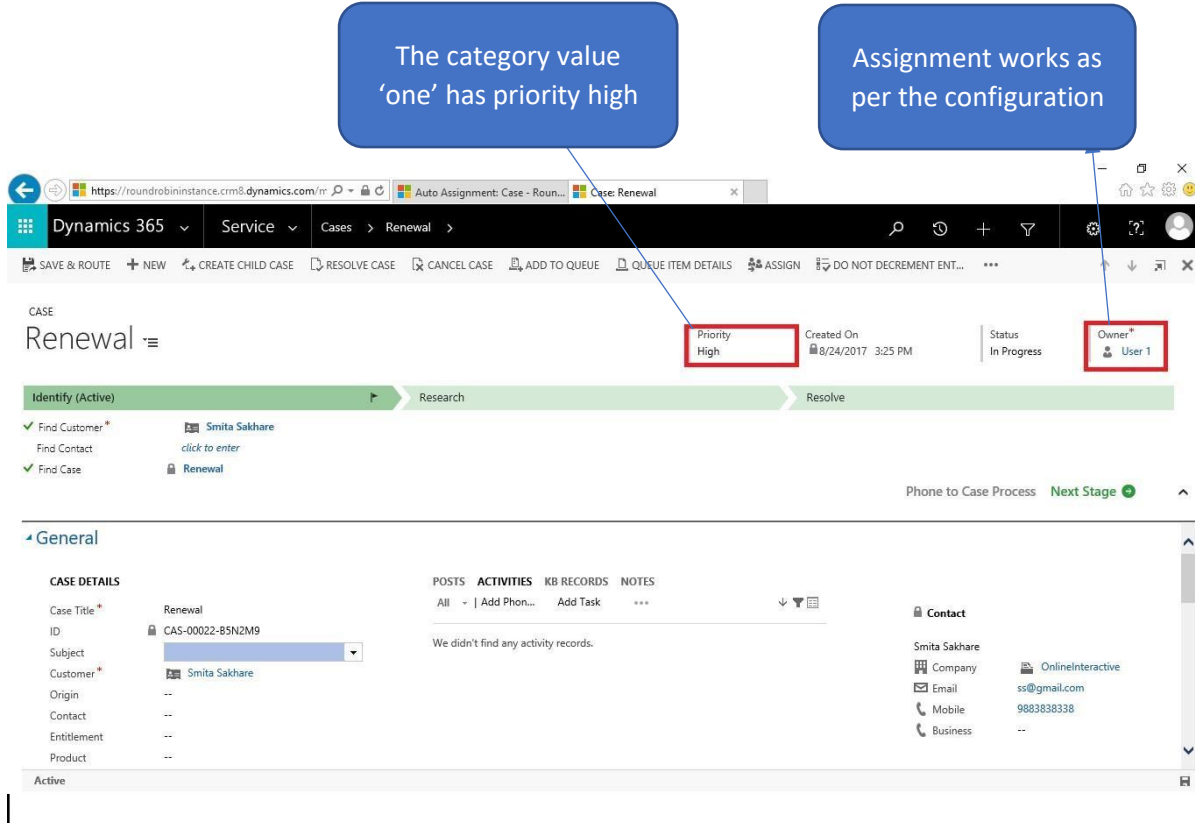
Full Name	Primary Email	Counter
User 1	user1@testorg004.onmicrosoft.com	0
User 3	User3@testorg004.onmicrosoft.com	0
Vishakha Mhaske	vishakhamhaske@testorg004.onmi...	1

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: Renewal

Priority: High

Created On: 8/24/2017 3:25 PM

Status: In Progress

Owner: User 1

Identify (Active) -> Research -> Resolve

Find Customer*
Find Contact
Find Case

Smita Sakhare
click to enter
Renewal

Phone to Case Process Next Stage

General

CASE DETAILS

Case Title: Renewal

ID: CAS-00022-B5N2M9

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 Case - Load Balancing

AUTO ASSIGNMENT : INFORMATION

Case - Round Robin

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 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

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

Name
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 set Yes

Category Information

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

Specify the category details required

Team Members

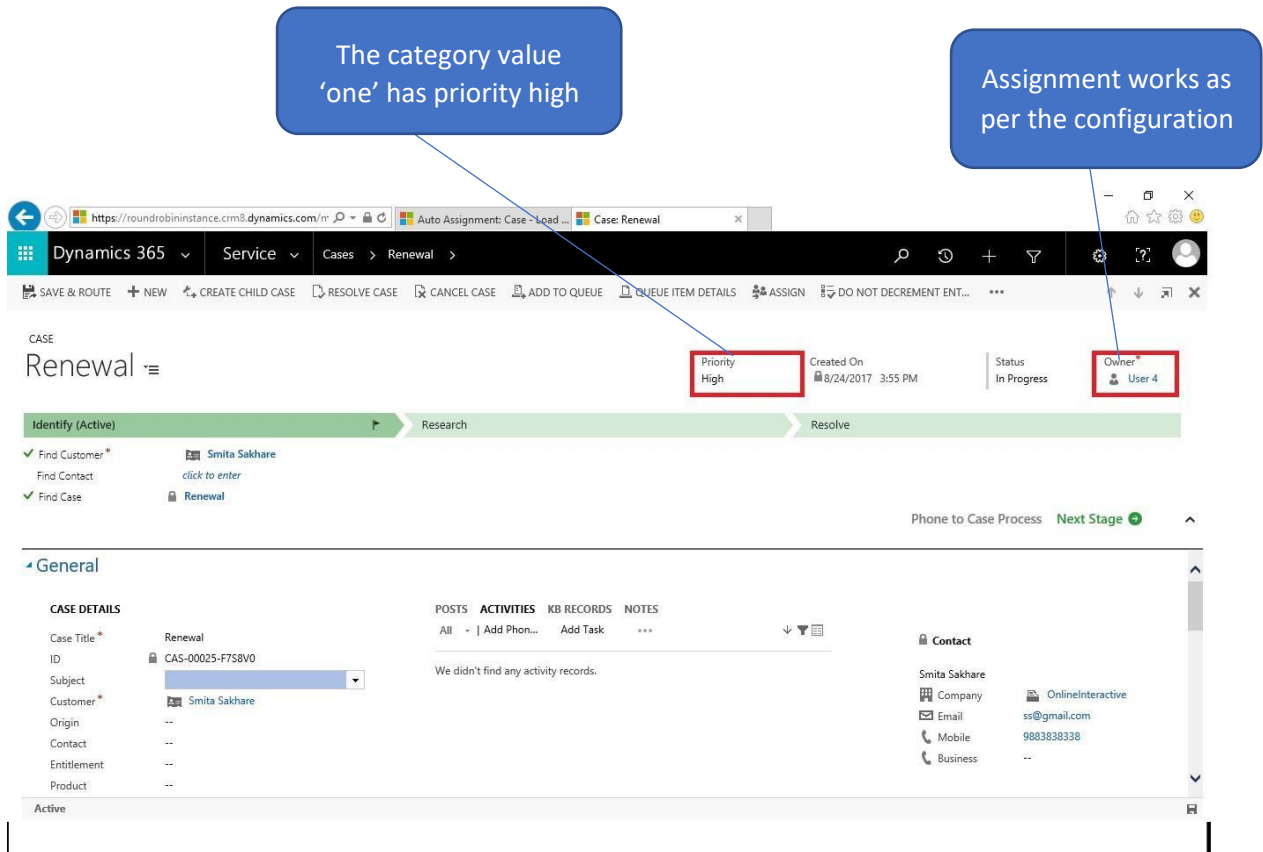
Full Name ↑	Primary Email	Counter
User 3	User3@testorg004.onmicrosoft.com	0
User 4	user4@testorg004.onmicrosoft.com	0
Vishakha Mhaske	vishakhamhaske@testorg004.onmi...	1

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



Case: Renewal

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-F758V0

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

Name: 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

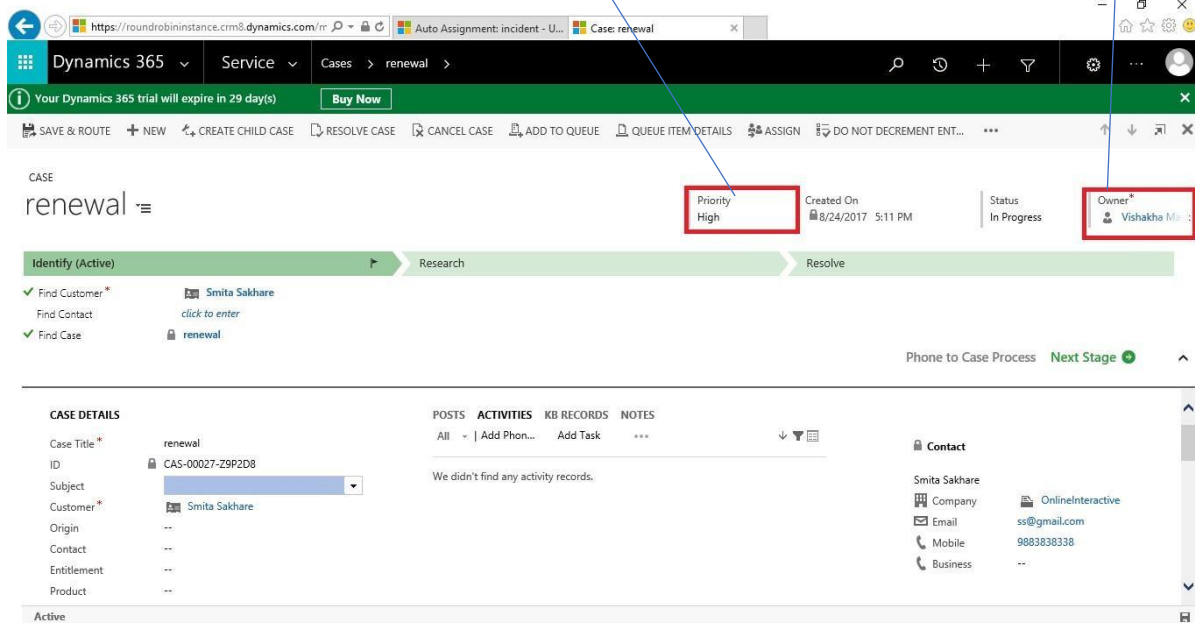
Category Details

TEST RESULT BASED ON CATEGORY:

Creation of a case

The category value 'one' has priority high

Assignment works as per the configuration



The screenshot displays the Dynamics 365 interface for a case titled 'renewal'. The top navigation bar shows 'Dynamics 365' and 'Service' tabs. The case details section includes fields for 'Case Title' (renewal), 'ID' (CAS-00027-Z9P2D8), 'Subject', 'Customer' (Smita Sakhare), 'Origin', 'Contact', 'Entitlement', and 'Product'. The process flow shows 'Identify (Active)' followed by 'Research' and 'Resolve'. The 'Priority' is set to 'High', and the 'Owner' is 'Vishakha M...'. The 'Status' is 'In Progress'. The 'Contact' section lists 'Smita Sakhare' with 'Company' (OnlineInteractive), 'Email' (ss@gmail.com), 'Mobile' (9883838338), and 'Business' contact details.