



# 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. Introduction .....	4
2. Purpose .....	4
3. Logic Used .....	5
4. Set up of Auto Assignment.....	7
5. Conclusion .....	11

## **1. INTRODUCTION**

In Industries, there are certain departments i.e. Sales and Service where their respective teams are aligned to work upon. In day to day scenarios, it is manually not feasible to distribute the work to a single peer, which might end up overloading the work. To have an ethic work balance, CRM enables a configurable solution basis record assignment. This is a guide to provide on how CRM Auto Assignment plugin configuration functions.

## **2. PURPOSE**

The purpose is to serve the below:

- a) Configurable solution for any entity
- b) Assignment of the records

### **3. LOGIC USED**

There is a custom field named 'counter' which tracks the leads/cases counts of the users that are been assigned available in a branch.

#### **1. DIRECT ASSIGNMENT:**

In direct assignment, the records are assigned to the mentioned user directly based on the schema name specified.

#### **2. ROUND ROBIN:**

This functionality works as per random assignment i.e. initially the counter will be set to zero, after the trigger point is invoked, there will be random lead/case assignment among the users. Once the record count is same for all the users then again, the counter is set to zero and the assignment will work based on the schema name been specified. Hence, every time there will be same amount of a work catered among the users.

#### **3. LOAD BALANCING:**

In Load balancing, only initially the counter will be set to zero after the trigger point is invoked for the first time, there will be random assignment based on the schema name been specified. Second time (when all the users lead/case count is equal) when the trigger point is invoked then the counter is not set to zero, assignment will work basis lowest lead/case count.

**4. ASSIGNMENT OF THE RECORDS USING ROUND ROBIN/LOAD BALANCING WITH CATEGORY:**

Assignment of the records will happen based on certain category using round robin or load balancing.

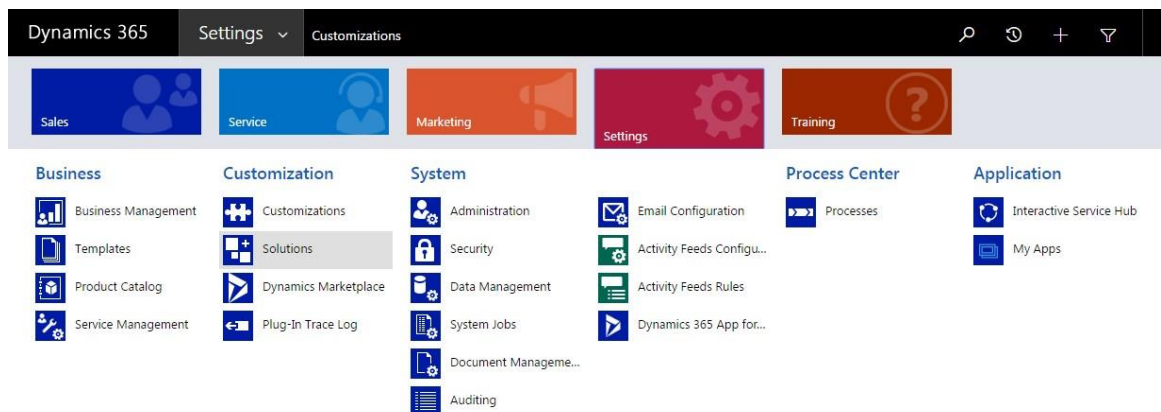
**5. ASSIGNMENT BASED ON CATEGORY:**

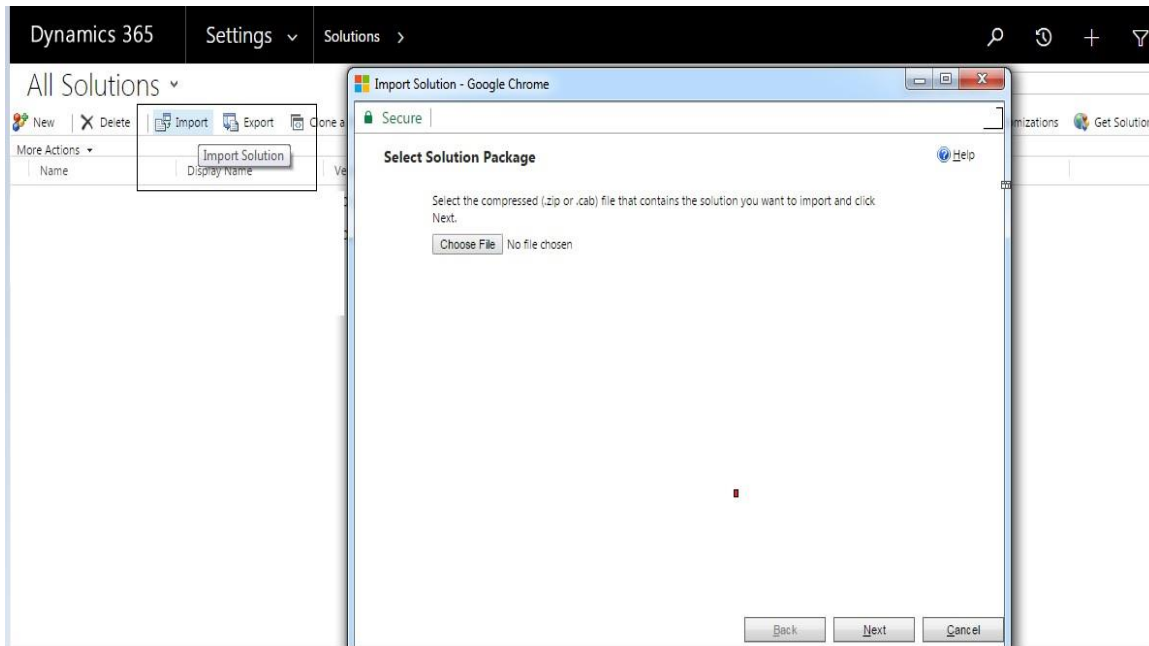
Assignment of the record will happen based on single category or multiple category.

## 4. AUTO ASSIGNMENT SETUP

### 4.1 Steps to Configure Auto Assignment in CRM:


1. Login into MS CRM using the System Administrator/Customizer role.
2. Navigate to Customizations>Solutions>Import the solutions.
3. Import the solution named "AutoAssignment\_1\_0\_0\_2\_managed".
4. Close the window once the solution installed successfully.



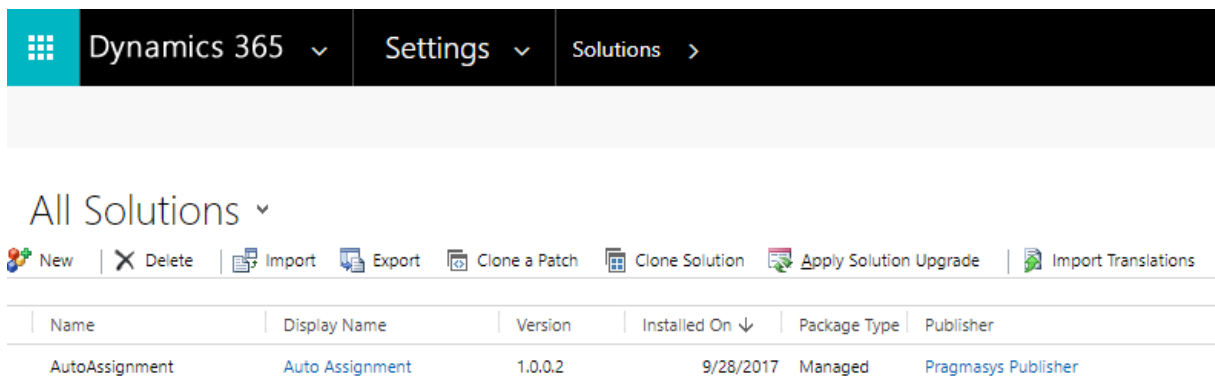


- Browse and import the below solution.

Name

 AutoAssignment\_1\_0\_0\_2\_managed

- Check under the solution once import done successfully.

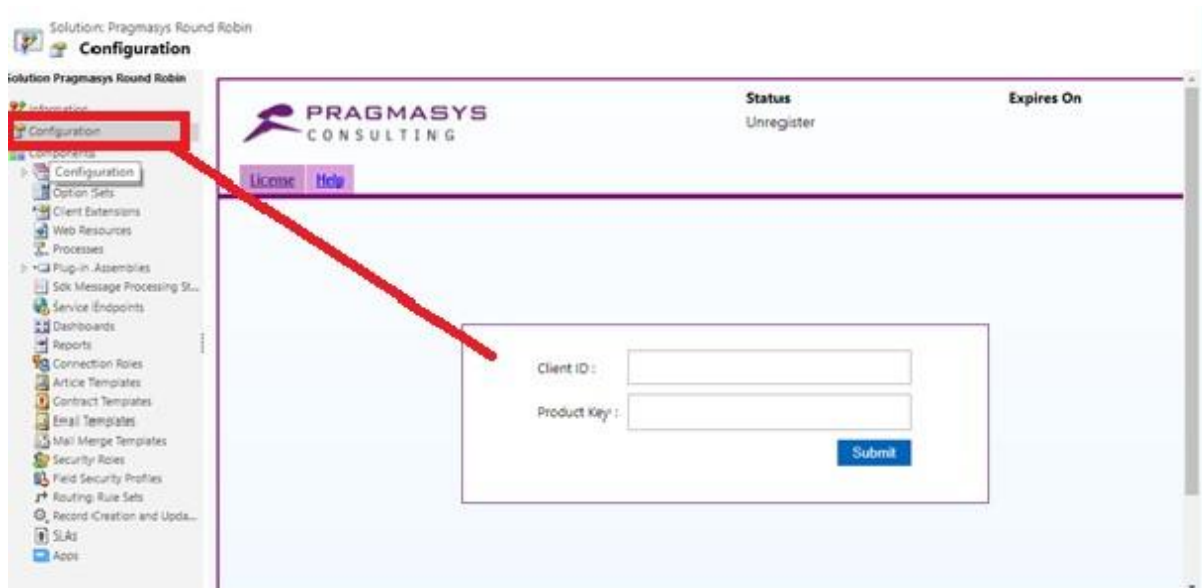




**Note: To uninstall (delete) solution you need to delete all auto assignment configuration records.**

#### 4.2 Steps to Register Auto Assignment in CRM:

1. Open Solution “AutoAssignment\_1\_0\_0\_2\_managed “
2. Click on Configuration
3. Provide the Client ID and Product Key
4. Click on the submit button



**Note: To get client ID kindly visit the link**

[https://product.pragmaxrm.com:8443/Product%20Registration/Registration.aspx?item\\_name=autoassignment](https://product.pragmaxrm.com:8443/Product%20Registration/Registration.aspx?item_name=autoassignment)

PRAGMASYS CONSULTING	Status Unregister	Expires On
<a href="#">License</a> <a href="#">Help</a>		
<p data-bbox="555 629 991 656">Client ID: <input type="text" value="XXXXXXXXXX"/></p> <p data-bbox="555 680 991 707">Product Key: <input type="text" value="XXXXX-XXXXX-XXXXX-XXXXX"/></p> <p data-bbox="906 725 991 752"><input type="button" value="Submit"/></p>		
<small>2017 © Copyright - Pragmasys Consulting   All Rights Reserved - Designed by pragmasys.in</small>		

## 5. CONCLUSION

Therefore, using CRM Auto Assignment plugin records can be assigned to a single user(s) or a team and below can be achieved:

- Work can be divided among the users equivalently
- Enables to utilize the manpower efficiently