



# Lead.Assign.Distribute



White Paper

## Lead Assignment And Distribution Automation - White Paper

### Aim:

Lead Assignment And Distribution Automation is a productivity app that assures systematic allotment/assignment of leads to respective Dynamics 365 CRM users based on user ability and workload.

### Features:

- Supports OOB as well as Custom Entities
- Fair distribution of Leads with Round Robin algorithm
- Assign leads depending on individual user capacity
- Queue and assign Leads based on Round Robin algorithm
- Allot pending assignments and awaiting Leads on-demand or through waiting workflow
- Set Priority or Criteria while assigning Leads
- Monitor and Analyze distribution of Leads with Dashboards

### Supported Versions

**Versions:** Microsoft Dynamics 365 v9.x and above, Power Apps & CDS.

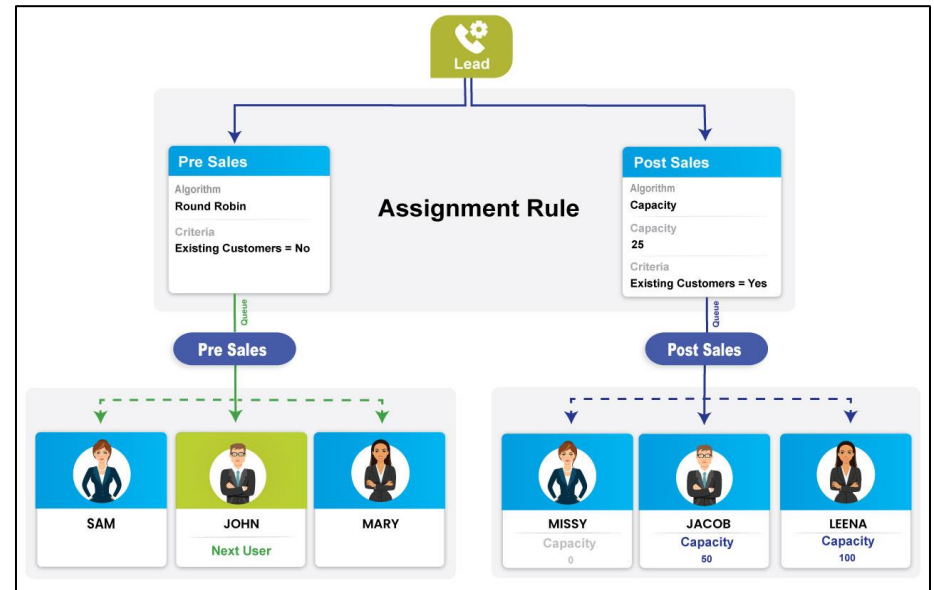
**Deployment Models:** On-Premises and Online.

### Who needs it?

Lead Assignment And Distribution Automation helps managers to allocate and distribute incoming leads and customer queries in an organized way to the respective team members. In this way, manager can ensure each and every Lead is pursued with diligence by the team members. There will be no more loss of Leads due to negligence and mismanagement. Such efficient lead management will further improve sales and increase ROI.

### LEAD ASSIGNMENT USE CASE DIAGRAM

The following diagram illustrates the two Assignment Rules of Lead assignment - Round Robin and Capacity Assignment Algorithm.



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## QUEUE & USERS

Setup Queues & Users to assign leads among the Dynamics 365 CRM users.

The screenshot shows the 'Assignment Details' page for user James Grey. The left sidebar contains navigation links: Home, Recent, Pinned, Administration, Dashboards, Users, Queues, Teams, License Registration, Assignment Configur..., and Assignment Error Logs. The main content area is titled 'James Grey User' and includes tabs for Summary, Assignment Details (selected), Details, Administration, Scheduling, Omnichannel, and Related. Under 'Assignment Details', there is a 'Capacity & Queue' section showing 'Base Capacity' as 20 and 'Available Capacity' as ---. Below this is a 'Queues' table with columns for Name, Incoming Email, No. of Members, and Queue Items.

Name	Incoming Email	No. of Members	Queue Items
<classicpublications>	---	30	0
<James Grey>	---	1	0
<Lead Assignment and Distribution Autom...	---	2	0

The screenshot shows the 'Lead Queue' page. The left sidebar is the same as the previous screenshot. The main content area is titled 'Lead Queue' and includes tabs for Summary, Conflicts Tab, and Related. The 'SUMMARY' section shows fields for Name (Lead), Type (Private), Incoming Email (---), Owner (Harry Buttler), and Description (Lead from Website). The 'QUEUE ITEMS' section has a table with columns for Title, Entered Queue, and Worked By, but it displays 'No data available.'

## Assignment Configuration

Enable OOB or Custom entities for automatic assignment.

The screenshot shows the 'Enable Assignment Configuration' dialog. It has two panes: 'Available Entities' and 'Selected Entities'. In the 'Available Entities' pane, 'Lead' is selected and highlighted with a red box. In the 'Selected Entities' pane, 'Appointment' is listed. Between the panes are '>>' and '<<' buttons, with the '>>' button highlighted by a red box.

## Assignment Rules

Create assignment rules to distribute Leads based on Round Robin Algorithm and Capacity Algorithm.

### Round Robin Algorithm:

The screenshot shows the 'Leads from Website' assignment rule configuration page. The top bar includes 'Leads from Website', 'Assignment Rule', 'Round Robin Assignment Algorithm', 'Leads from Website Queue', and 'John Smith Owner'. The 'General' tab is selected, showing fields for Name (Leads from Website), Description (Leads from Website), Assignment Configuration (Lead), and Queue (Leads from Website). The 'Execution Criteria' section shows 'Criteria Mode' as Simple and 'Execution Order' as 1. The 'Fetch Xml' section contains an XML snippet for fetching leads. The 'Queue' section shows 'Leads from Website'.

XML Snippet:

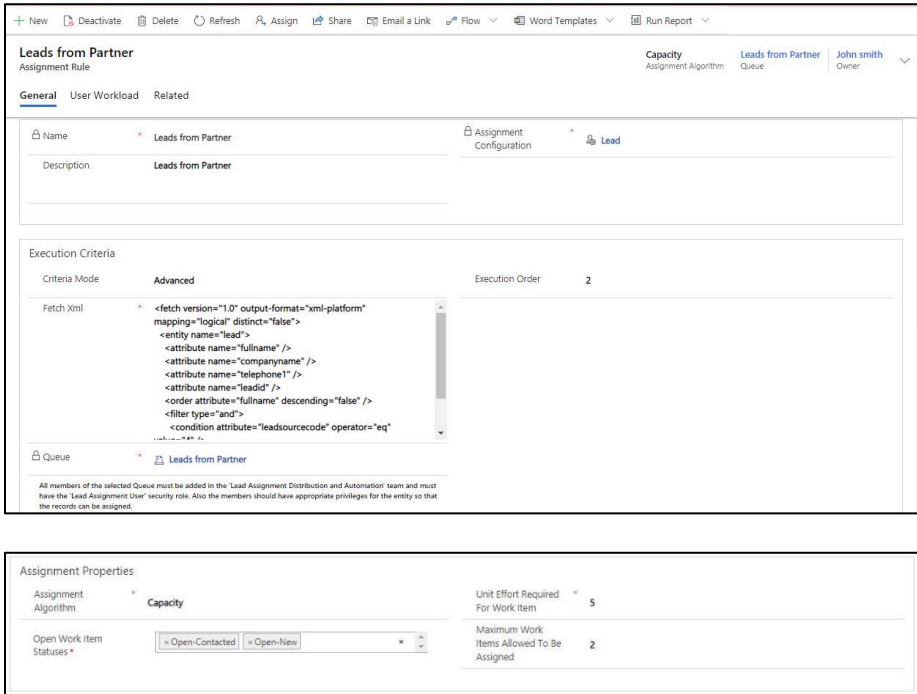
```
<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false">
  <entity name="lead">
    <attribute name="fullname" />
    <order attribute="fullname" descending="false" />
    <filter type="and">
      <condition attribute="leadsourcecode" operator="eq" value="8" />
    </filter>
    <attribute name="leadid" />
  </entity>
</fetch>
```

The screenshot shows the 'Assignment Properties' section. It includes a dropdown for 'Assignment Algorithm' set to 'Round Robin', a field for 'Maximum Work Items Allowed To Be Assigned' set to 5, and a section for 'Open Work Item Statuses' with buttons for 'Open-Contacted' and 'Open-New'.

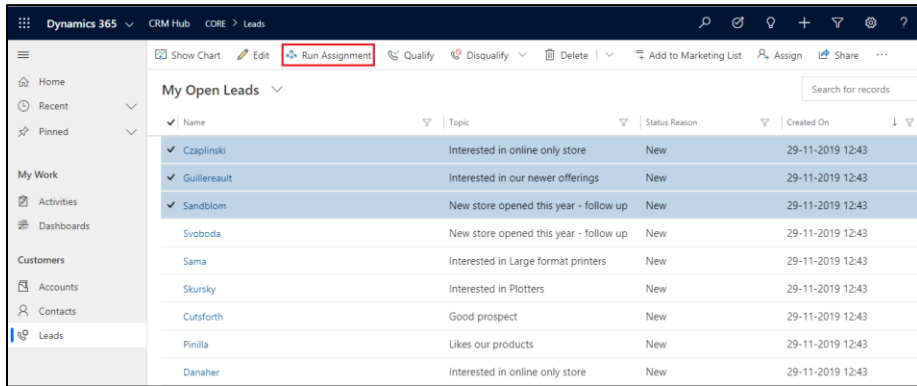
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## Capacity Algorithm:



The screenshot shows the 'Leads from Partner' Capacity Algorithm configuration. It includes fields for Name, Description, and Lead. The Execution Criteria section shows an XML fetch query for leads. The Queue section lists 'Leads from Partner'. The Assignment Properties section shows settings for Unit Effort Required (5) and Maximum Work Items Allowed To Be Assigned (2).

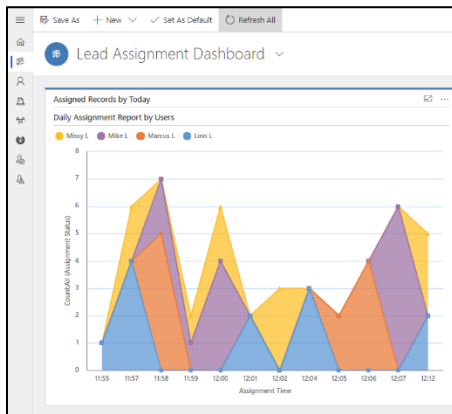
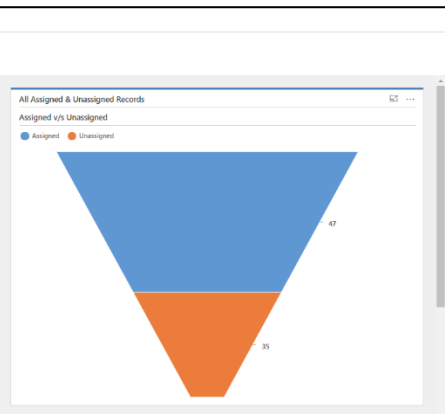


This screenshot displays the 'My Open Leads' view in Dynamics CRM. A table lists leads with columns for Name, Topic, Status Reason, and Created On. The 'Run Assignment' button is highlighted in the top navigation bar.

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## Dashboards

View charts and graphs for Un-assigned and Assigned Leads on dashboards.

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## Assignment Error Logs

Errors logs are listed in 'Assignment Error Logs' Entity during any fallout while performing features.

Page 4 of 5

New

Deactivate

Delete

Refresh

Assign

Share

Email a Link

Flow

Word Templates

Run Report

Leads from Partner

Assignment Rule

Capacity

Assignment Algorithm

Leads from Partner

Queue

John Smith

Owner

General

User Workload

Related

Name

Leads from Partner

Description

Leads from Partner

Assignment Configuration

Lead

Execution Criteria

Criteria Mode

Advanced

Execution Order

2

Fetch Xml

```

<fetch version="1.0" output-format="xml-platform"
mapping="logical" distinct="false">
  <entity name="lead">
    <attribute name="fullname" />
    <attribute name="companyname" />
    <attribute name="telephone1" />
    <attribute name="leadid" />
    <order attribute="fullname" descending="false" />
    <filter type="and">
      <condition attribute="leadsourcecode" operator="eq"

```

Queue

Leads from Partner

All members of the selected Queue must be added in the 'Lead Assignment Distribution and Automation' team and must have the 'Lead Assignment User' security role. Also the members should have appropriate privileges for the entity so that the records can be assigned.

Assignment Properties

Assignment Algorithm

Capacity

Open Work Item Statuses

Open-Contacted

Open-New

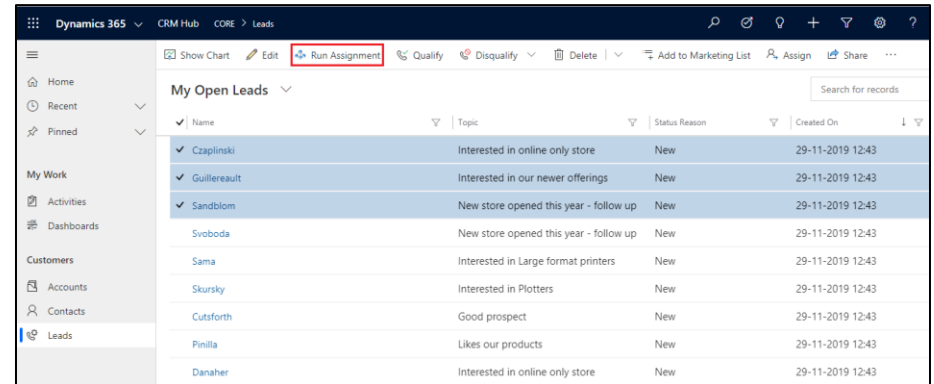
Unit Effort Required For Work Item

5

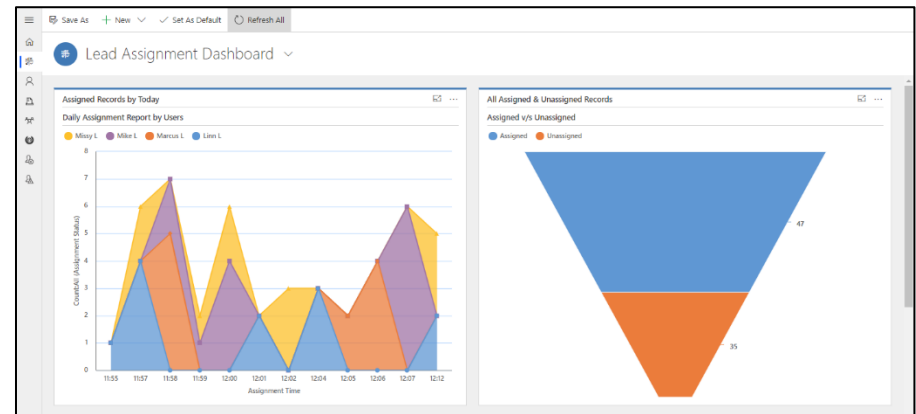
Maximum Work Items Allowed To Be Assigned

2

Auto-assign already existing Leads (before the installation of solution) in your CRM to respective users as per the newly configured Assignment Rules with on-demand 'Run Assignment' button.



View charts and graphs for Un-assigned and Assigned Leads on dashboards.



Errors logs are listed in 'Assignment Error Logs' Entity during any fallout while performing features.

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**Contact Us:**

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