Lead.Assign.Distribute

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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

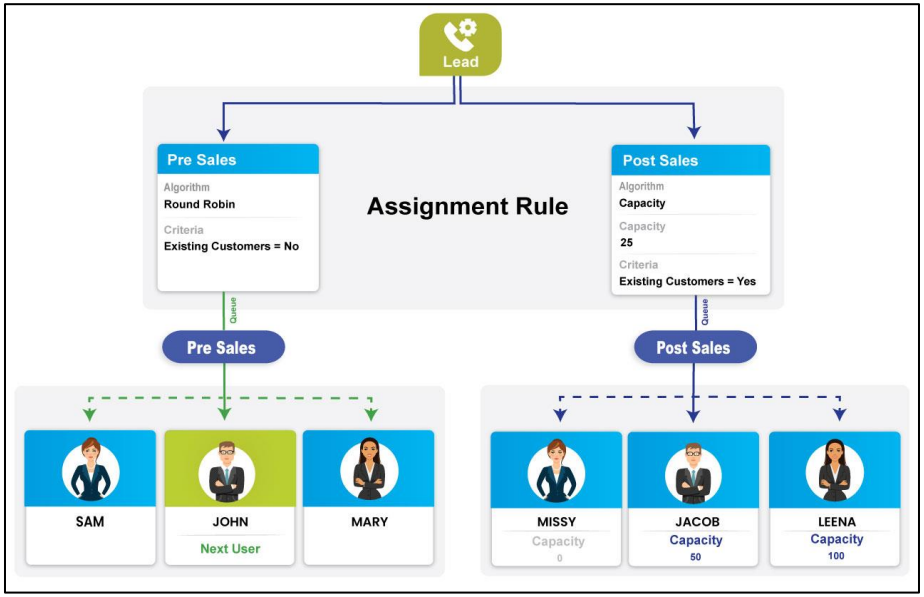
Versions: Microsoft Dynamics 365 v9.x and above, Power Apps & CDS.
Deployment Models: On-Premises and Online.

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.

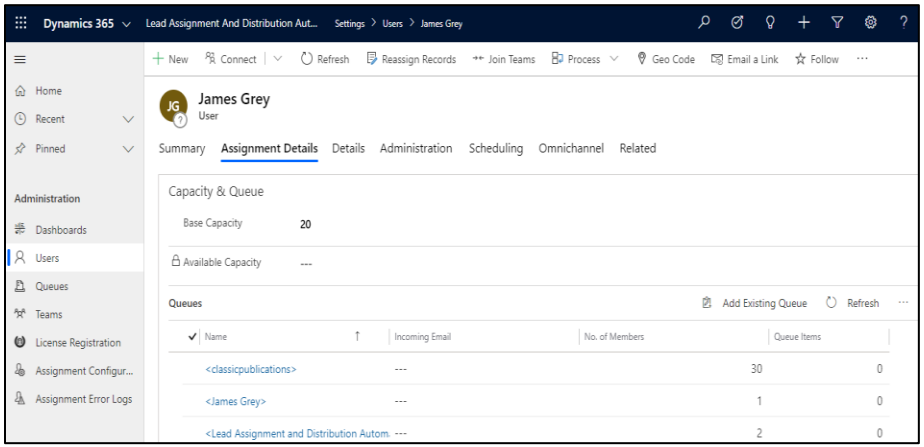
LEAD ASSIGNMENT USE CASE DIAGRAM

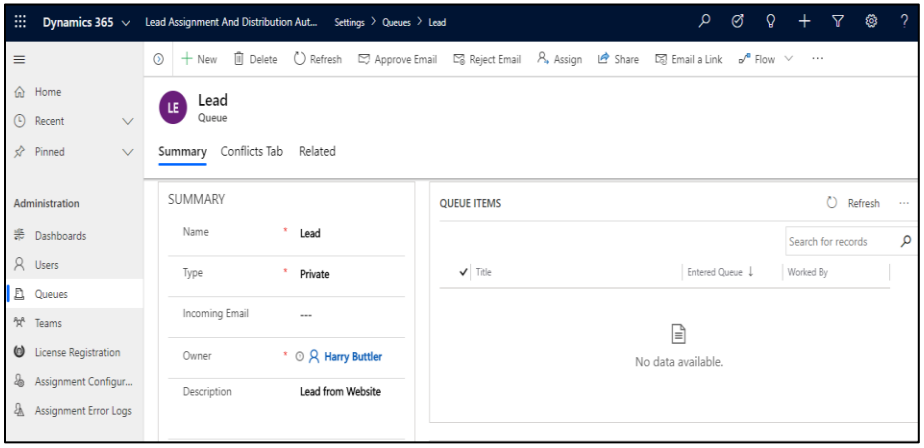
The following diagram illustrates the two Assignment Rules of Lead assignment - Round Robin and Capacity Assignment Algorithm.



QUEUE & USERS

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





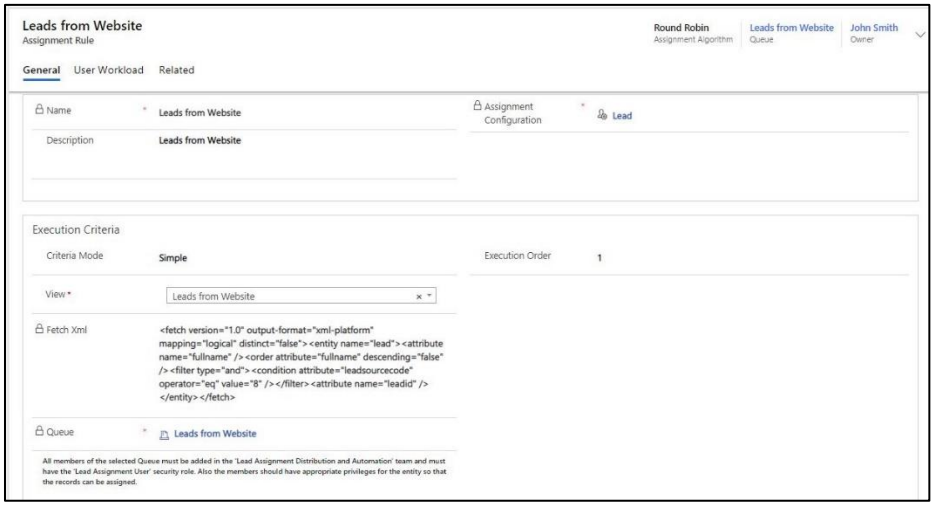
Assignment Configuration

Enable OOB or Custom entities for automatic assignment.

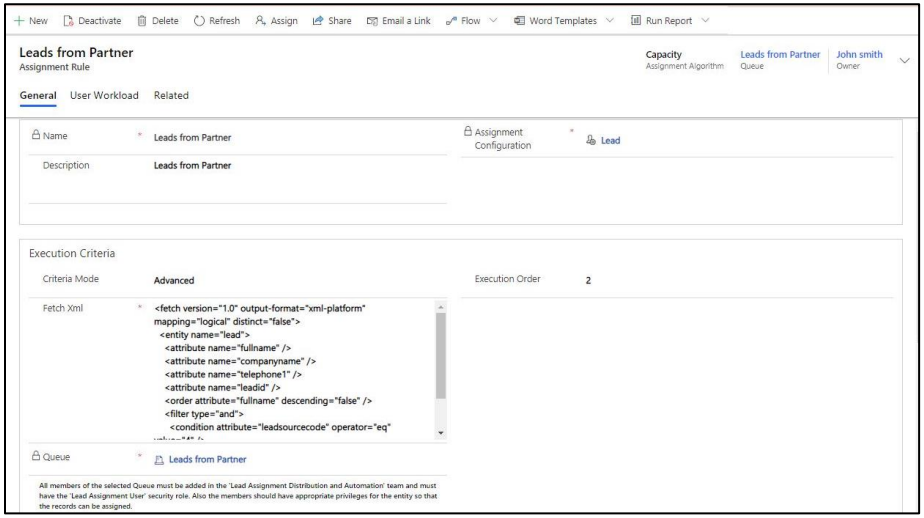
Assignment Rules

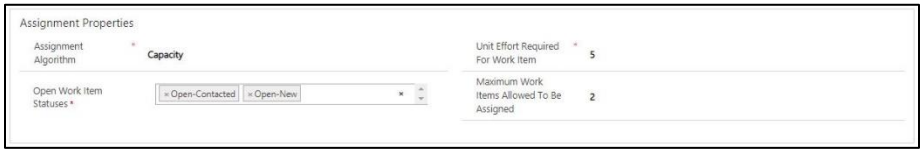
Create assignment rules to distribute Leads based on Round Robin Algorithm and Capacity Algorithm.

Round Robin Algorithm:



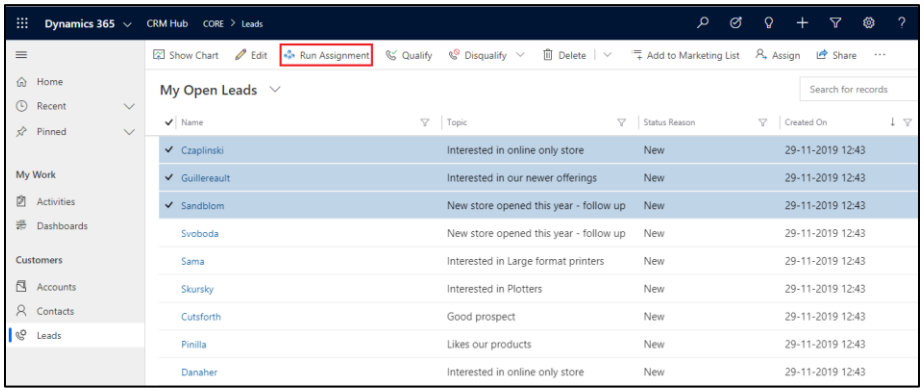
Capacity Algorithm:





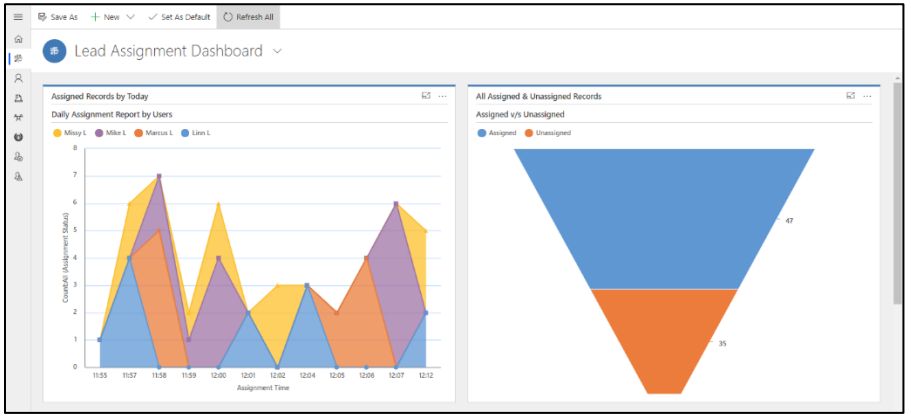
Auto-Assign Existing Leads

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



Dashboards

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



Assignment Error Logs

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

Contact Us:

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