Lead.Assign.Distribute

Automatic Assignment and Distribution of Leads using Round Robin & Capacity Algorithm

Key Features

Even Distribution
Distribute workloads evenly among the team in a sequential pattern using Round Robin algorithm

Fair Distribution
Assign records depending upon the capacity defined for each individual user to avoid over allocation

Selection Criterion
Ability to define selection criterion and assignment rules for processing records

Entity Support
Supports any OOB as well as Custom Entities.

Queues
Based off native queues in Dynamics 365 CRM

Dashboards
Monitor and Analyze distribution of Leads to each user with the helps of Dashboards

Lead.Assign.Distribute

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innovative logic
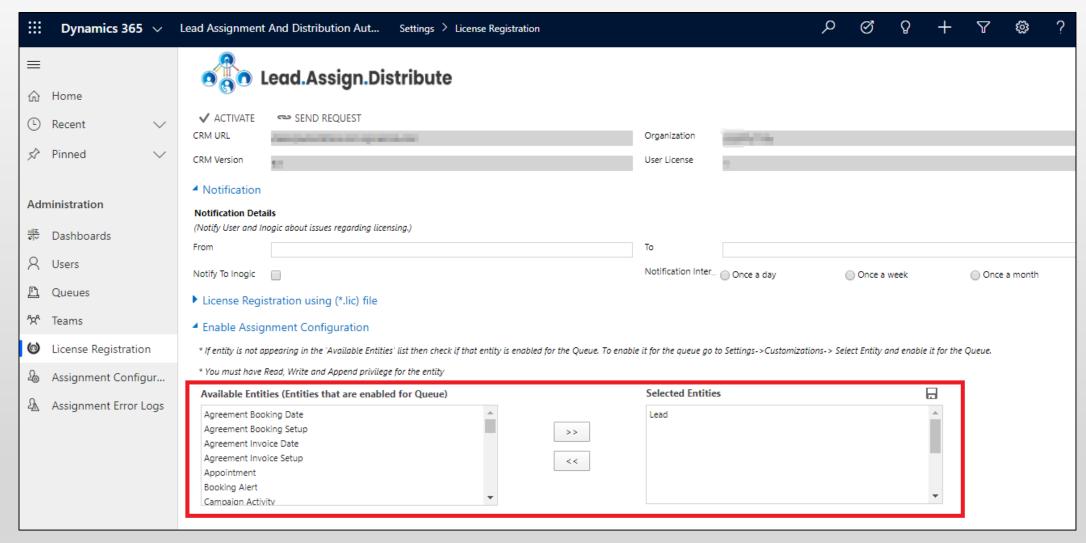inogic

Available For

SUPPORTED VERSIONS

- MICROSOFT DYNAMICS 365 v9.x and above
- Power Apps
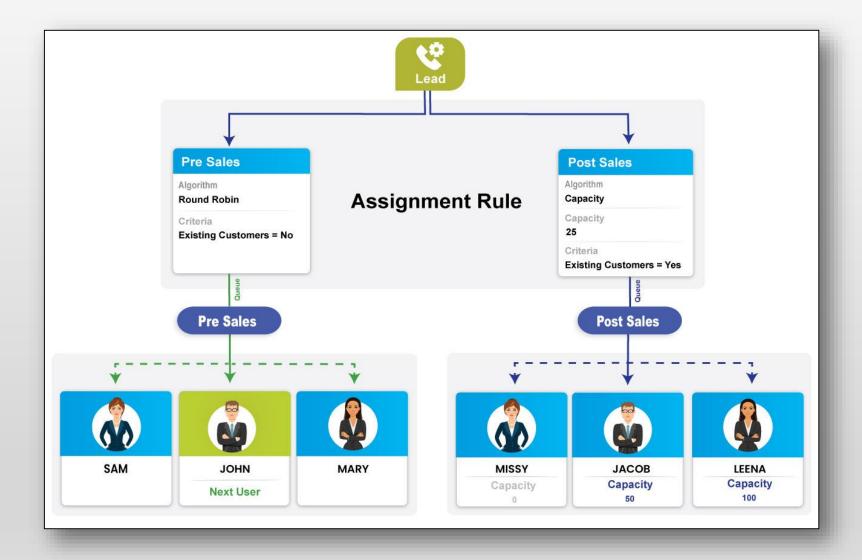- CDS

DEPLOYMENTS

- ON-PREMISES
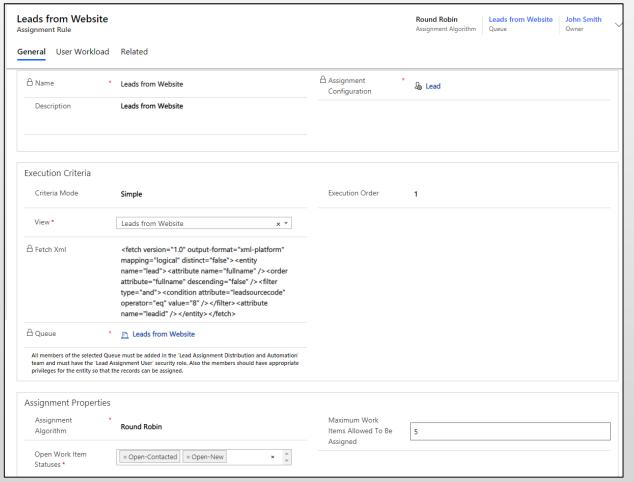- DYNAMICS 365 ONLINE
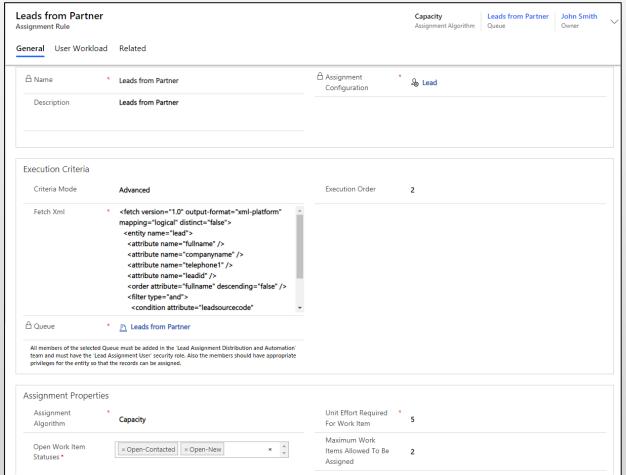
Configure Entities for Auto-Assignment

Lead Assignment Use Case

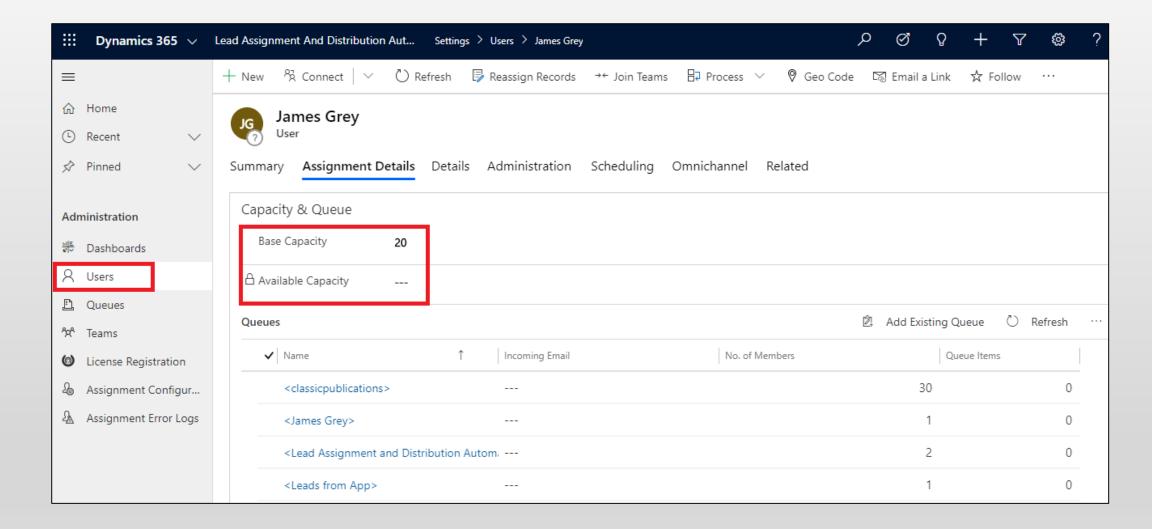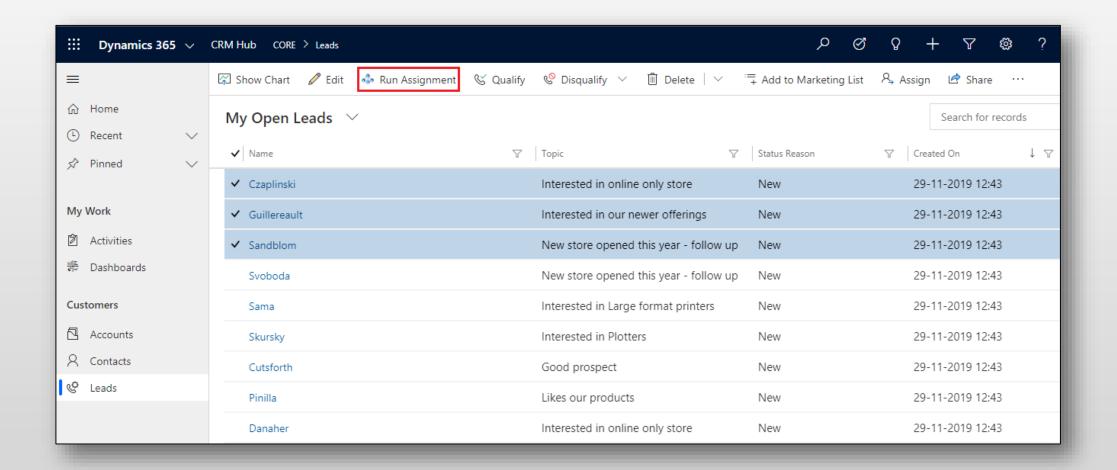# Assign Leads based on Rules using Round Robin or Capacity Algorithm

Set up User Capacity for Work Distribution
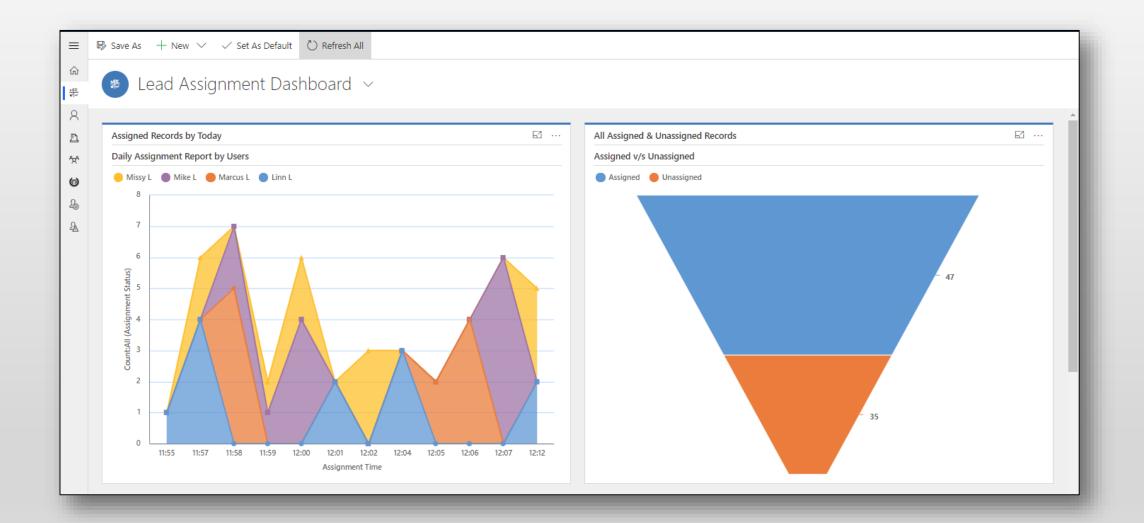

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On-Demand Assignment Button

Dashboard Visualization

Next Steps

Learn more about **Lead Assignment And Distribution Automation** today.

Get your free **Lead Assignment And Distribution Automation** trial from Microsoft AppSource or our website!

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