



Lead.Assign.Distribute

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



Lead.Assign.Distribute

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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



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

Dynamics 365

Lead Assignment And Distribution Aut...

SettingsLicense Registration

HomeRecentPinnedAdministrationDashboardsUsersQueuesTeamsLicense RegistrationAssignment Configur...Assignment Error Logs

Lead.Assign.Distribute

ACTIVATESEND REQUEST

CRM URLOrganization

CRM VersionUser License

Notification

Notification Details

(Notify User and Inogic about issues regarding licensing.)

FromTo

Notify To Inogic☐

Notification Inter...

Once a dayOnce a weekOnce a month

License Registration using (*.lic) file

Enable Assignment Configuration

* If entity is not appearing in the 'Available Entities' list then check if that entity is enabled for the Queue. To enable it for the queue go to Settings->Customizations-> Select Entity and enable it for the Queue.

* You must have Read, Write and Append privilege for the entity

Available Entities (Entities that are enabled for Queue)

Agreement Booking Date

Agreement Booking Setup

Agreement Invoice Date

Agreement Invoice Setup

Appointment

Booking Alert

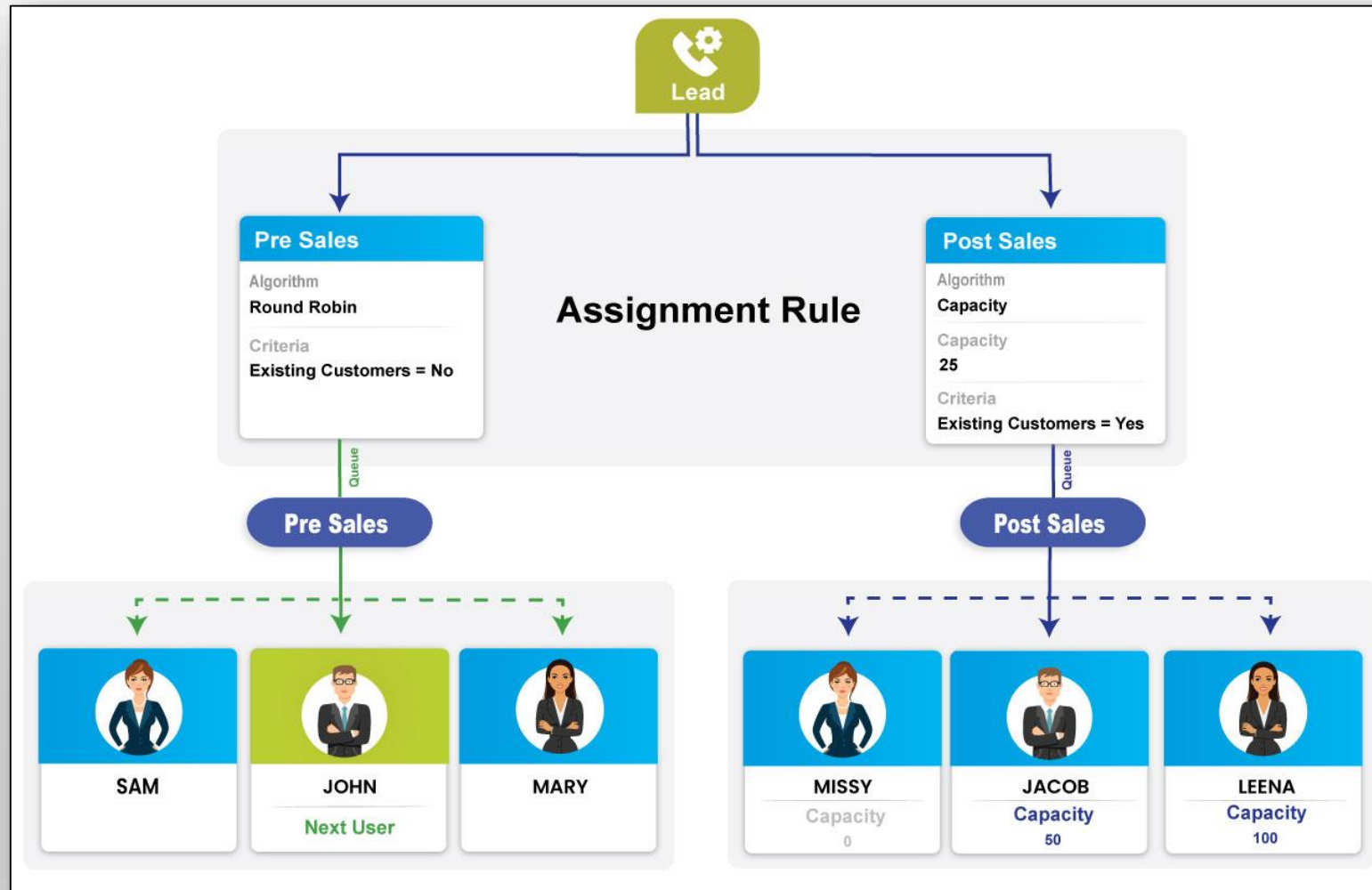
Campaign Activity

>><<

Selected Entities

Lead

Lead Assignment Use Case



Assign Leads based on Rules using Round Robin or Capacity Algorithm

Leads from Website

Assignment Rule

Round Robin

Assignment Algorithm

Leads from Website

Queue

John Smith

Owner

General

User Workload

Related

Name

Leads from Website

Description

Leads from Website

Assignment Configuration

Lead

Execution Criteria

Criteria Mode

Simple

Execution Order

1

View

Leads from Website

Fetch Xml

<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>

Queue

Leads from Website

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

Round Robin

Maximum Work Items Allowed To Be Assigned

5

Open Work Item Statuses

Open-Contacted

Open-New

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" /></filter></entity></fetch>

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

Unit Effort Required For Work Item

5

Maximum Work Items Allowed To Be Assigned

2

Open Work Item Statuses

Open-Contacted

Open-New



Set up User Capacity for Work Distribution

Dynamics 365 ▾ Lead Assignment And Distribution Aut... Settings > Users > James Grey

+ New Connect | ▾ Refresh Reassign Records Join Teams Process ▾ Geo Code Email a Link Follow ...

James Grey
User

Summary **Assignment Details** Details Administration Scheduling Omnichannel Related

Capacity & Queue

Base Capacity	20
Available Capacity	---

Queues Add Existing Queue Refresh ...

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



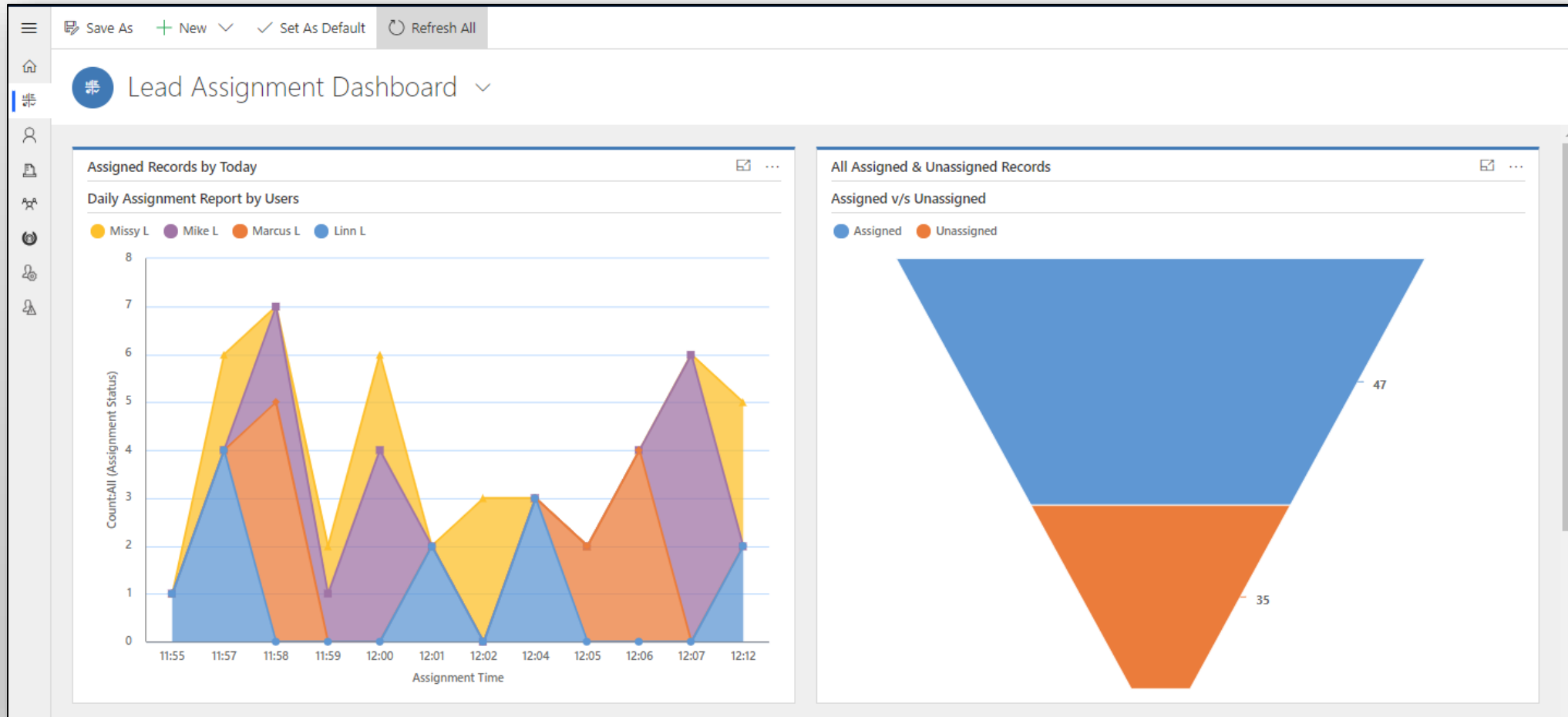
On-Demand Assignment Button

The screenshot shows the Microsoft Dynamics 365 CRM Hub interface. The top navigation bar includes 'Dynamics 365', 'CRM Hub', 'CORE', and 'Leads'. The left sidebar shows navigation options: Home, Recent, Pinned, My Work (Activities, Dashboards), Customers (Accounts, Contacts, Leads), and Leads (selected). The main area displays 'My Open Leads' with a search bar and a table of leads. The 'Run Assignment' button is highlighted with a red box.

Name	Topic	Status Reason	Created On
✓ Czaplinski	Interested in online only store	New	29-11-2019 12:43
✓ Guillereault	Interested in our newer offerings	New	29-11-2019 12:43
✓ Sandblom	New store opened this year - follow up	New	29-11-2019 12:43
Svoboda	New store opened this year - follow up	New	29-11-2019 12:43
Sama	Interested in Large format printers	New	29-11-2019 12:43
Skursky	Interested in Plotters	New	29-11-2019 12:43
Cutsforth	Good prospect	New	29-11-2019 12:43
Pinilla	Likes our products	New	29-11-2019 12:43
Danaher	Interested in online only store	New	29-11-2019 12:43



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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