



Lead.Assign.Distribute

**Lead Assignment in Dynamics
365 CRM**



Lead.Assign.Distribute

crm@inogic.com

Key Features

Round Robin Algorithm

Leads are distributed fairly with the use of Round Robin method.

User Capacity

Leads are assigned depending upon the capacity of individual users.

Selection Criteria

Distribute Leads on the basis of priority or criteria.

Entity Support

Supports any OOB as well as Custom Entities.

Dashboards

View and Analyze distribution of Leads through charts and graphs.



Available For

SUPPORTED VERSIONS

- MICROSOFT DYNAMICS 365 v9.x and above

DEPLOYMENTS

- ON-PREMISES
- DYNAMICS 365 ONLINE



Configure Entities for Auto-Assignment

Dynamics 365 ▾ Lead Assignment Distribution And Aut... Settings > License Registration

Lead.Assign.Distribute

✓ ACTIVATE ↻ SEND REQUEST

▸ License Registration

CRM Details

CRM URL	leadassi432.crm8.dynamics.com	Organization	org146330b2
CRM Version	9.1	User License	8

▸ Notification

Notification Details
(Notify User and Inogic about issues regarding licensing.)

From: To:

Notify To Inogic ☐

Notification Interval ☒ Once a day ☐ Once a week ☐ Once 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)

- Knowledge Article Template
- Letter
- Phone Call
- Recurring Appointment
- Service Activity
- Social Activity
- Task

>> <<

Selected Entities

- Appointment
- Lead



Assign Leads based on Rules using Round Robin or Capacity Algorithm

Leads from Website

Assignment Rule

Round Robin

Leads from Website

John Smith

Assignment Algorithm

Queue

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

Leads from Partner

John Smith

Assignment Algorithm

Queue

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

Open Work Item Statuses

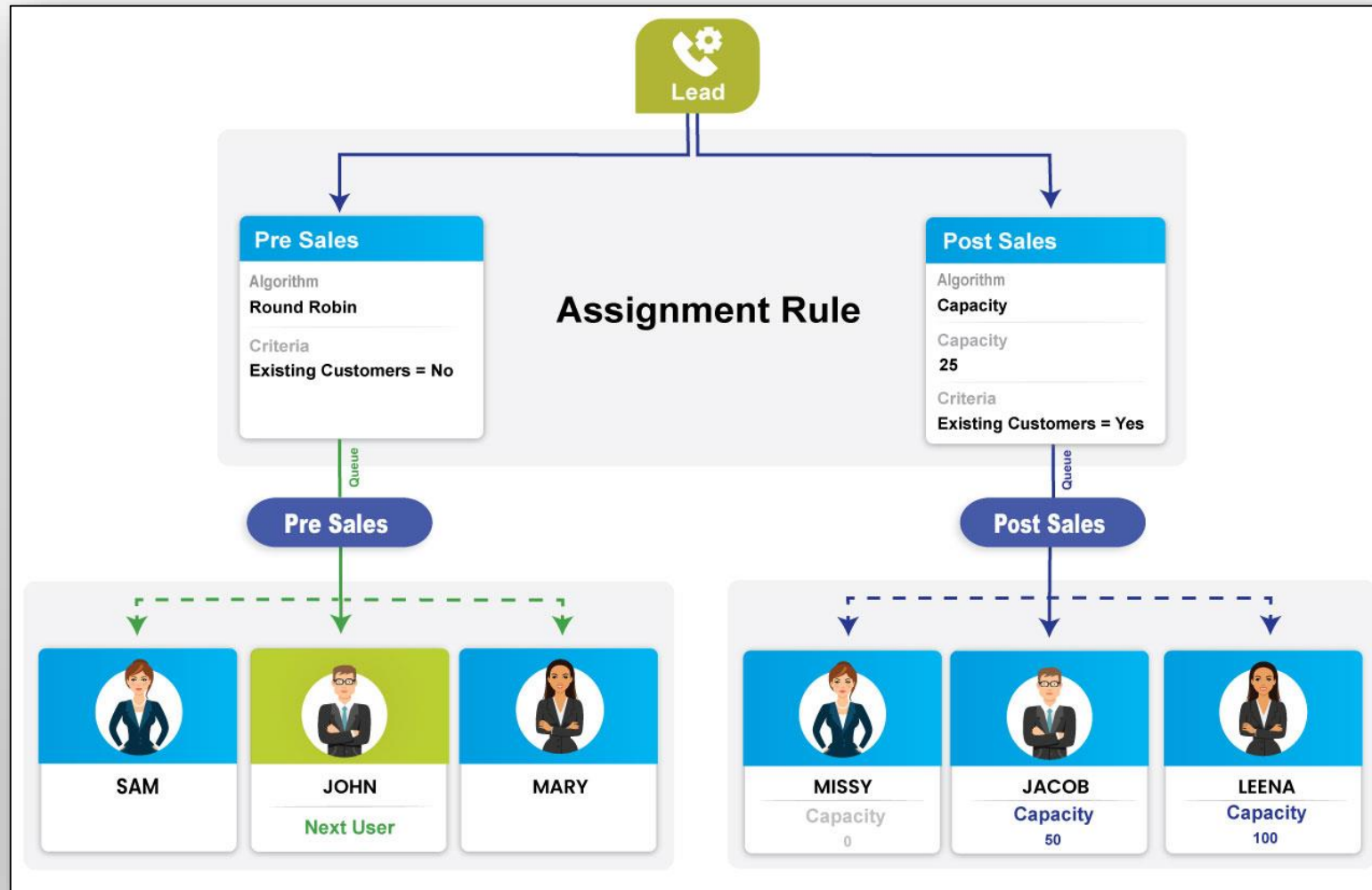
Open-Contacted

Open-New

Maximum Work Items Allowed To Be Assigned

2

Lead Assignment Use Case Diagram



Create Private Queues & Mention Per User Capacity

Dynamics 365 | Lead Assignment Distribution And Aut... | Settings > Queues > Lead

Lead Queue

Summary | Related

SUMMARY

Name	* Lead
Type	* Private
Incoming Email	---
Owner	* John smith
Description	Lead from Website

EMAIL SETTINGS

Convert Incoming Email To Activities	* All email messages
Mailbox	Lead

QUEUE ITEMS

Search for records

MEMBERS

Full Name: John sm

Dynamics 365 | Lead Assignment Distribution And Aut... | Settings > Users > Jean Williams

Jean Williams
User

Summary | **Assignment Details** | Details | Administration | Scheduling | Related

Capacity & Queue

Base Capacity	20
Available Capacity	16

Queues

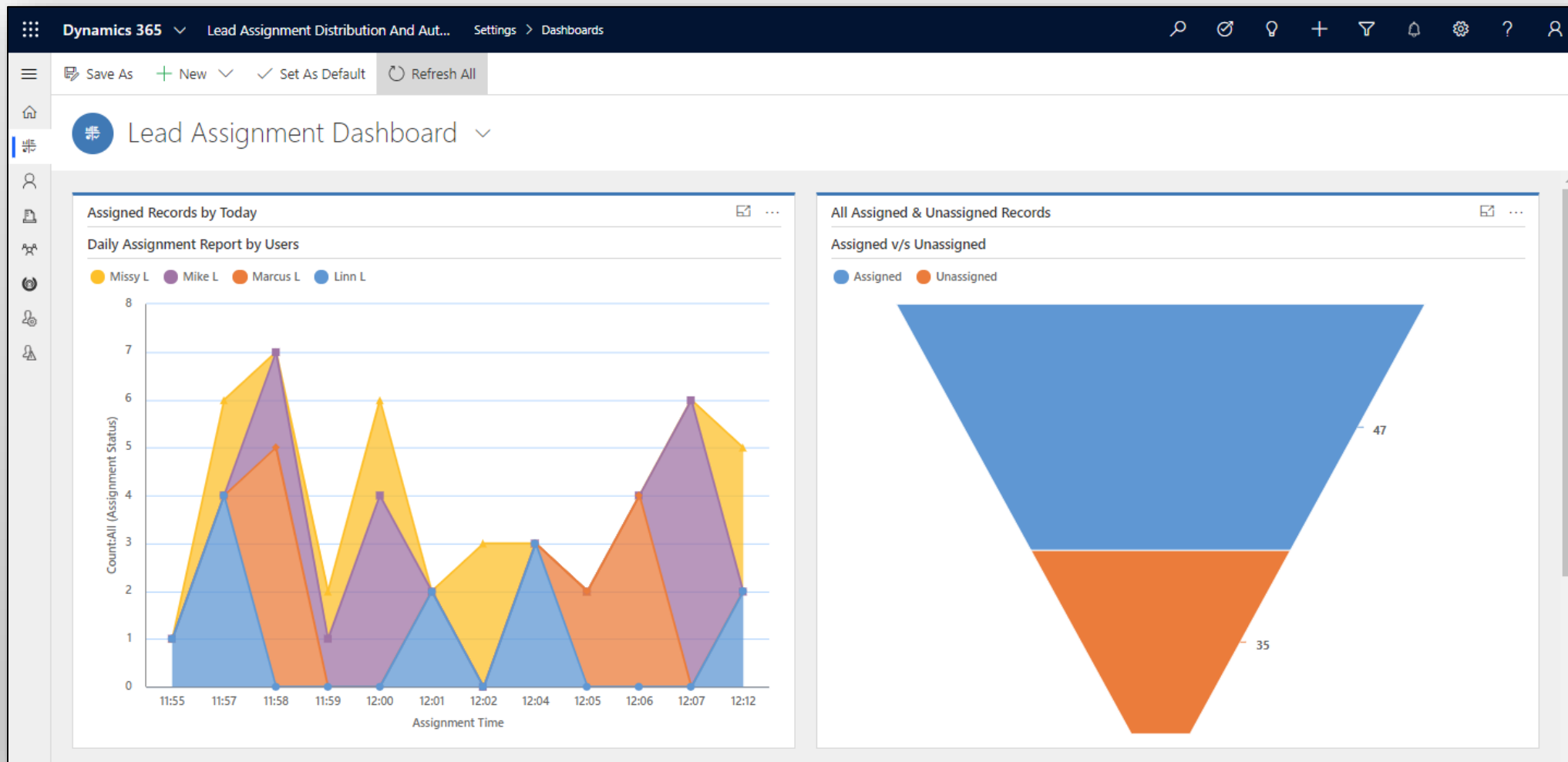
Name	Incoming Email	No. of Members	Queue Items
<j2020>	---	31	0
<Jean Williams>	---	1	0
<Lead Assignment Distribution and Automatio	---	7	0
Leads from Website	---	3	0

Assign Existing Leads with Run 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 in the top action bar.

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 Distribution & Automation](#) today.

Email: crm@inogic.com



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