White Paper

Aim:

Lead Assignment 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
- Queue and assign Leads based on Round Robin algorithm
- Assign leads depending on individual user capacity
- Allot pending assignments and awaiting Leads on-demand
- Set Priority or Criteria while assigning Leads
- Monitor and Analyze distribution of Leads with Dashboards

Supported Versions

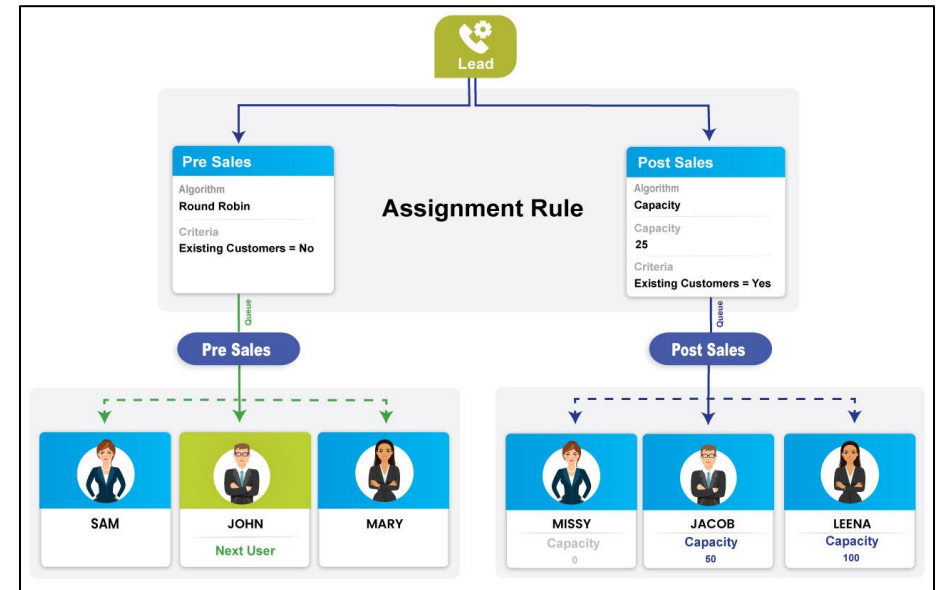**Versions:** Microsoft Dynamics 365 v9.x and above.
Deployment Models: On-Premises, Dynamics 365 Online and Partner-Hosted.

Who needs it?

Lead Assignment 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 scenario to understand how Lead Assignment Distribution & Automation works:

QUEUE & USERS

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

Assignment Configuration

Enable 'Assignment Configuration' for both Custom and OOB Entities to assign new records.

Assignment Rules

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

Round Robin Algorithm:

Capacity Algorithm:

Run Assignment

Assign the unassigned existing Leads in your CRM to respective users as per the newly configured Assignmnet Rules.
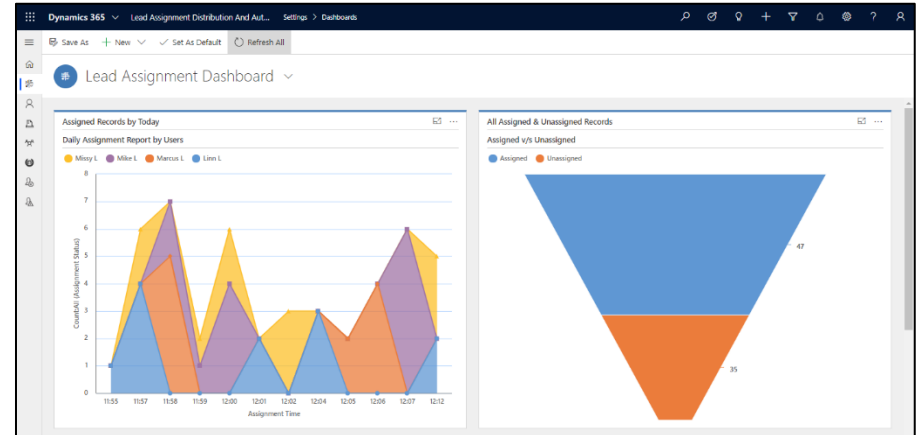

Dashboards

View charts and graphs on dashboards for daily assignment report of Unassigned and Assigned Leads.

Assignment Error Logs

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

Contact Us:

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