



Lead.Assign.Distribute



White Paper

Lead Assignment Distribution & Automation - 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.

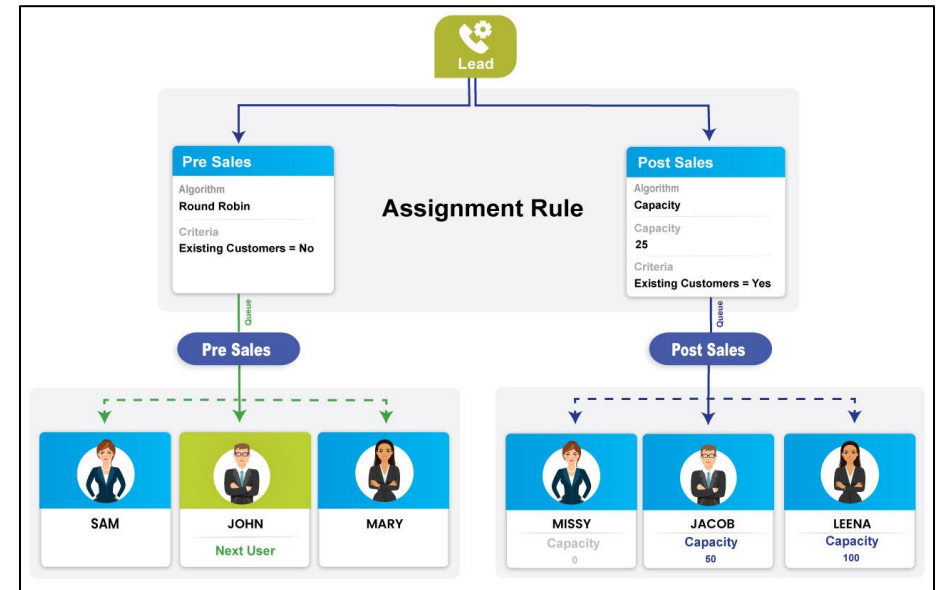
Deployment Models: On-Premises, Dynamics 365 Online and Partner-Hosted.

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:



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QUEUE & USERS

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

The screenshot shows the user profile for Jean Williams in Dynamics 365. The 'Users' section is active, displaying a table of queues. The table has columns for Name, Incoming Email, No. of Members, and Queue Items.

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

The screenshot shows the configuration for a queue named 'Lead'. The 'SUMMARY' section shows the queue name as 'Lead', type as 'Private', and owner as 'John Smith'. The 'EMAIL SETTINGS' section shows 'Convert Incoming Email To Activities' set to 'All email messages' and 'Mailbox' set to 'Lead'. The 'MEMBERS' section shows 'John Smith' assigned to the queue.

Assignment Configuration

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

The screenshot shows the 'Enable Assignment Configuration' dialog. It has two panes: 'Available Entities' and 'Selected Entities'. 'Lead' is selected in the 'Available Entities' list and has been moved to the 'Selected Entities' list. The '>>' button is highlighted with a red box.

Assignment Rules

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

Round Robin Algorithm:

The screenshot shows the configuration for an assignment rule named 'Leads from Website'. The 'General' tab is active, showing the rule name, description, and queue. The 'Execution Criteria' section shows 'Criteria Mode' set to 'Simple' and 'Execution Order' set to '1'. The 'Fetch Xml' section contains the following XML code:

```
<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>
```

The screenshot shows the 'Assignment Properties' for the 'Round Robin' algorithm. The 'Assignment Algorithm' is set to 'Round Robin'. The 'Open Work Item Statuses' are set to 'Open-Contacted' and 'Open-New'. The 'Maximum Work Items Allowed To Be Assigned' is set to '5'.

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Capacity Algorithm:

As you have selected Capacity algorithm, you need to mention capacity, on user entity, for each member of Queue selected in this Assignment Rule. For user with no capacity, auto assignment will not work.

Leads from Partner
Assignment Rule

Capacity Assignment Algorithm | Leads from Partner Queue | John Smith Owner

General | User Workload | Related

Name: Leads from Partner | Assignment Configuration: Lead

Description: Leads from Partner

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" operator="eq"
value="1" />
</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

Run Assignment

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

Dynamics 365 CRM Hub CORE > Leads

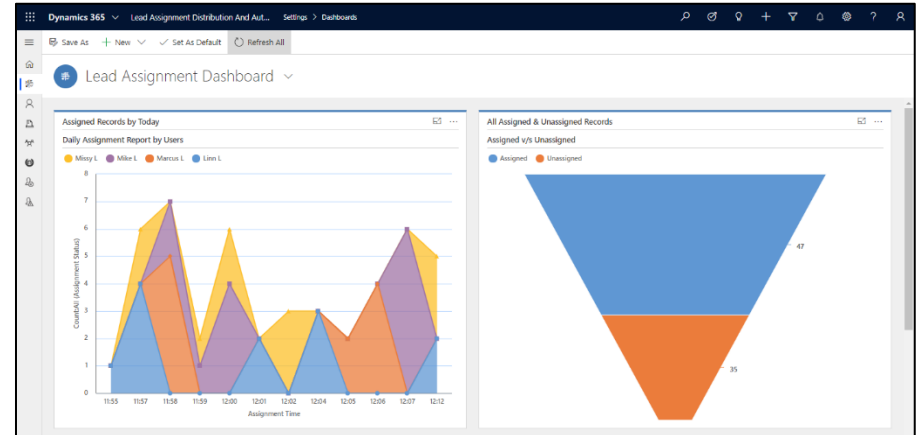
Run Assignment | Quality | Disqualify | Delete | Add to Marketing List | Assign | Share

My Open Leads

Name	Topic	Status Reason	Created On
Czapinski	Interested in online only store	New	29-11-2019 12:43
Gullereault	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

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.

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