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
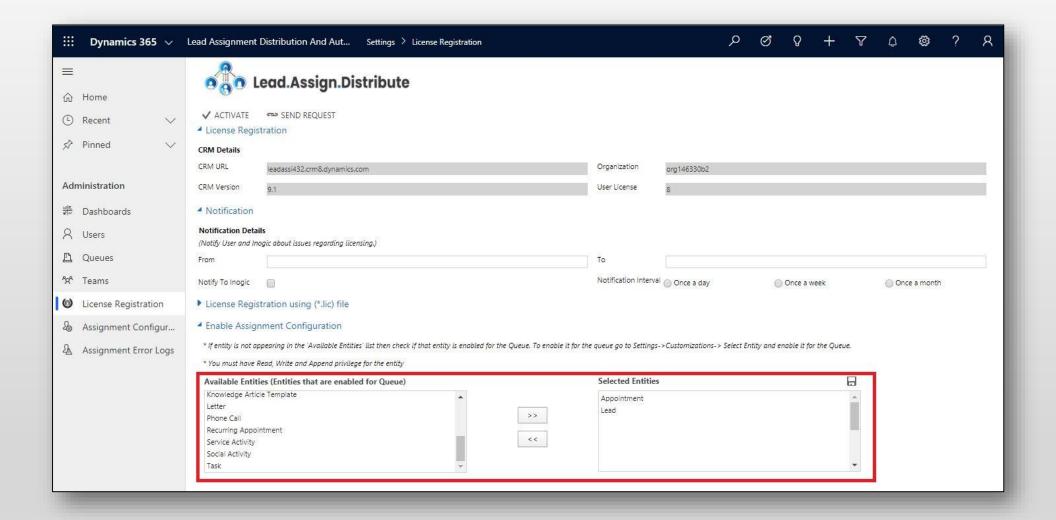
Available For

SUPPORTED VERSIONS

- MICROSOFT DYNAMICS 365 v9.x and above

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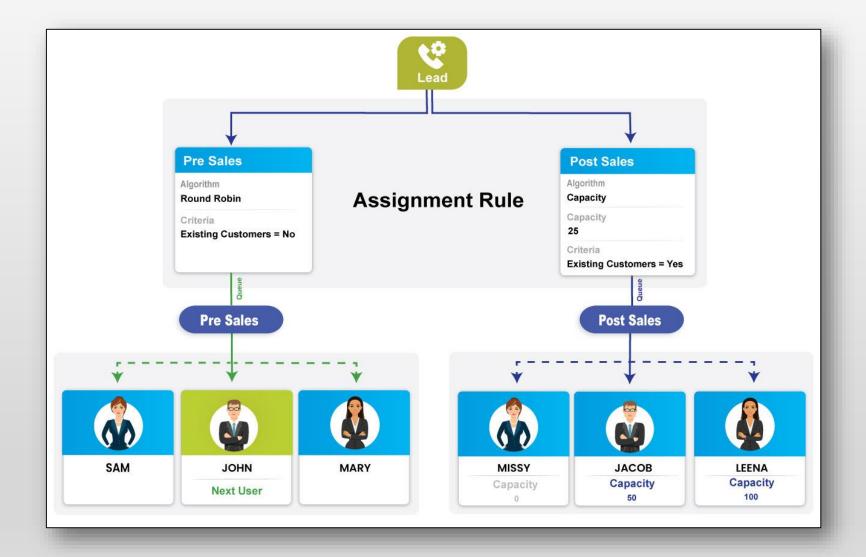
- ON-PREMISES
- DYNAMICS 365 ONLINE
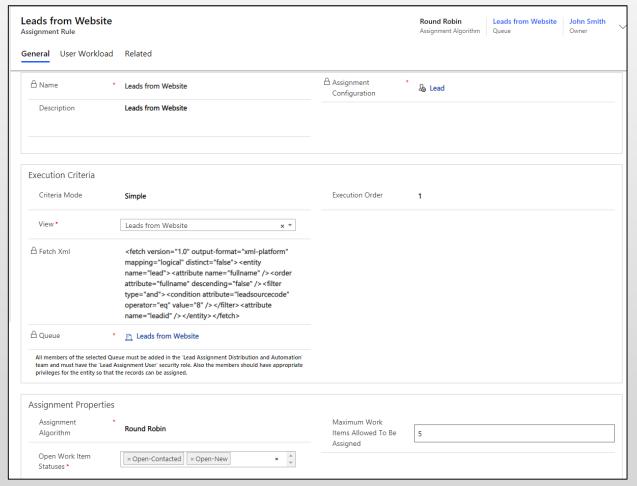
Configure Entities for Auto-Assignment

crm@inogic.com

Lead Assignment Use Case

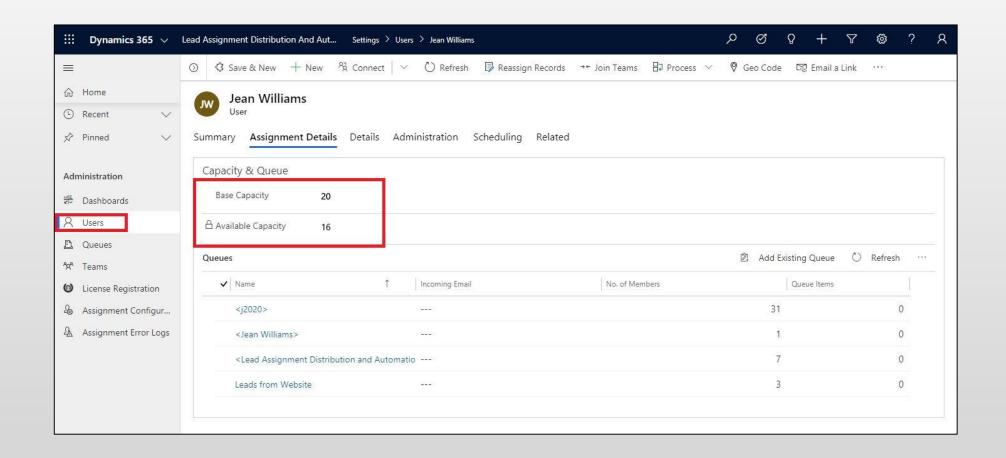# Assign Leads based on Rules using Round Robin or Capacity Algorithm

Leads from Website
Assignment Rule

Round Robin	Leads from Website	John Smith
Assignment Algorithm	Queue	Owner

General   User Workload   Related

🔒 Name	*	Leads from Website	🔒 Assignment Configuration	*	👤 Lead
Description		Leads from Website			

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 × ▾		

⚠ 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	Leads from Partner	John Smith
Assignment Algorithm	Queue	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"
```

🔒 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

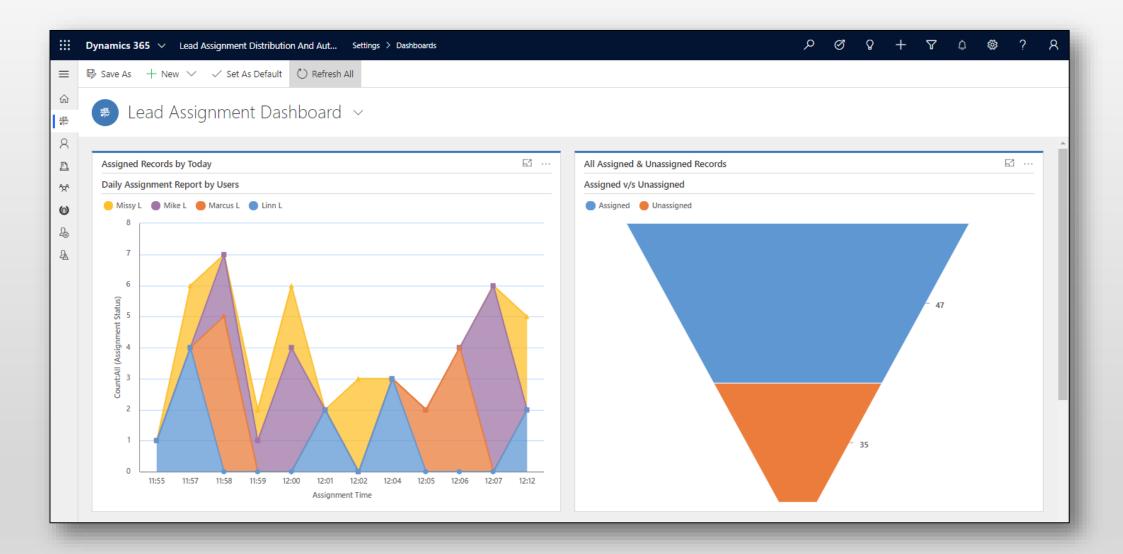| Assignment Algorithm	*	Capacity	Unit Effort Required For Work Item	*	5
Open Work Item Statuses *		× Open-Contacted × Open-New ×	Maximum Work Items Allowed To Be Assigned		2

Set up User Capacity for Work Distribution

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On-Demand Assignment Button

crm@inogic.com

Lead.Assign.Distribute

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Dashboard Visualization

crm@inogic.com

Next Steps

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