



Lead.Assign.Distribute



White Paper

Lead Assignment And Distribution Automation - White Paper

Aim:

Lead Assignment And 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
- Assign leads depending on individual user capacity
- Queue and assign Leads based on Round Robin algorithm
- Allot pending assignments and awaiting Leads on-demand or through waiting workflow
- 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.

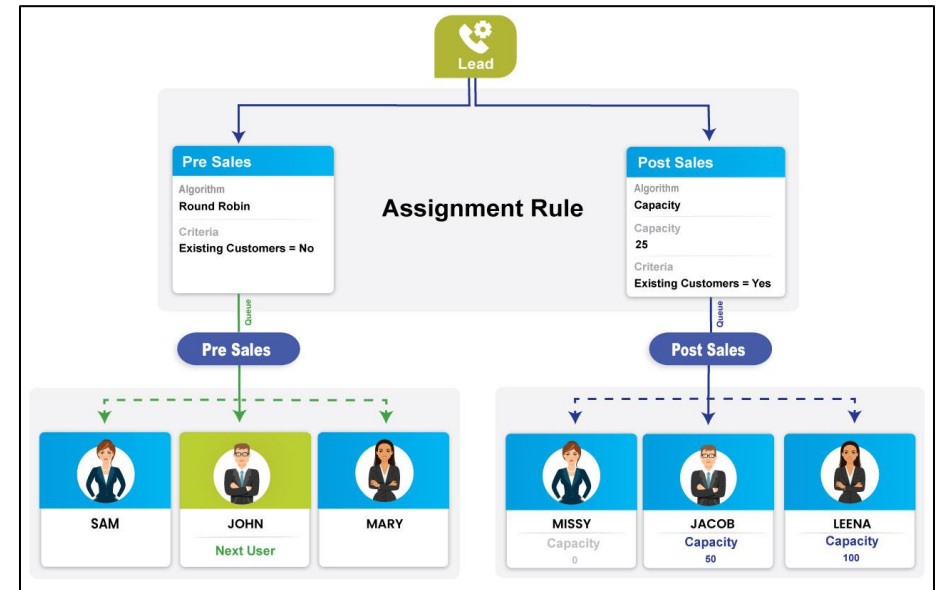
Deployment Models: On-Premises, Dynamics 365 Online and Partner-Hosted.

Who needs it?

Lead Assignment And 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

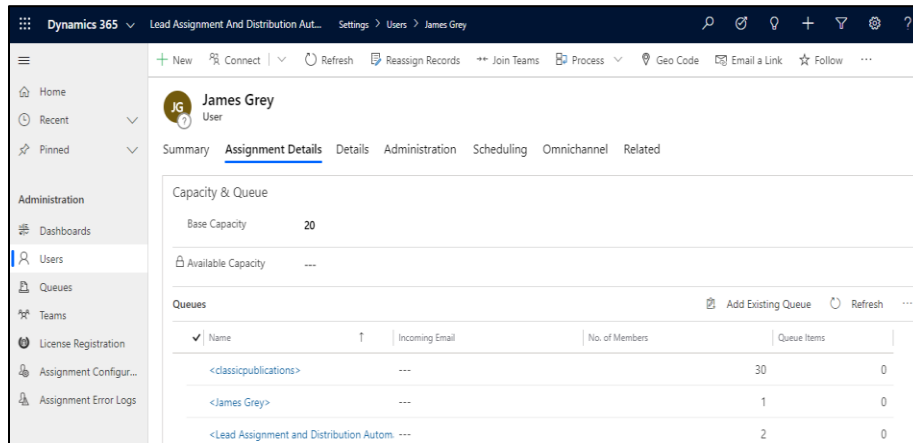
The following diagram illustrates the two Assignment Rules of Lead assignment - Round Robin and Capacity Assignment Algorithm.



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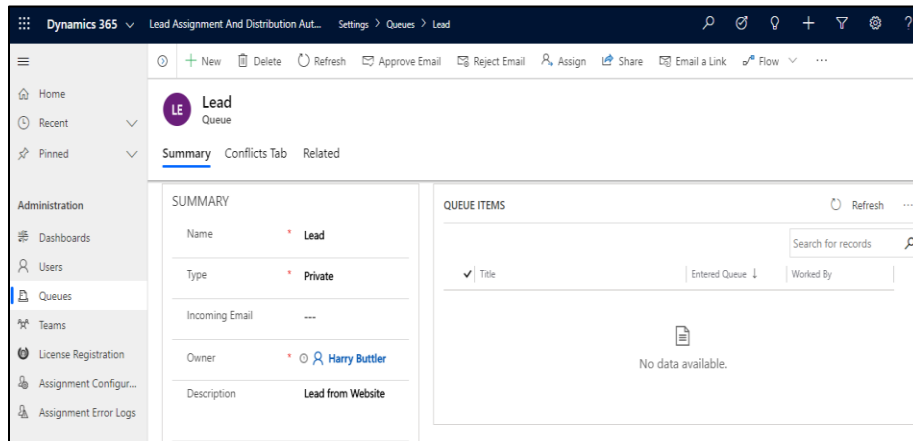
QUEUE & USERS

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



The screenshot shows the 'Assignment Details' for user James Grey. The 'Capacity & Queue' section displays a base capacity of 20 and an available capacity of ---. Below this, a table lists the queues assigned to the user:

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



The screenshot shows the 'Summary' tab for a 'Lead' queue. The 'SUMMARY' section displays the following details:

- Name: Lead
- Type: Private
- Incoming Email: ---
- Owner: Harry Buttler
- Description: Lead from Website

The 'QUEUE ITEMS' section shows a table with columns for Title, Entered Queue, and Worked By. A message indicates 'No data available.'

Assignment Configuration

Enable OOB or Custom entities for automatic assignment.

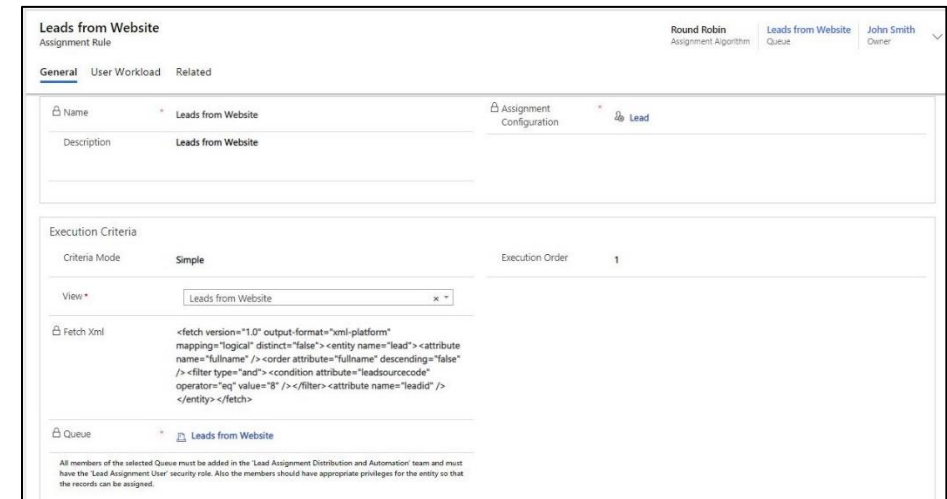


The screenshot shows the 'Enable Assignment Configuration' dialog. It features two lists: 'Available Entities' and 'Selected Entities'. The 'Available Entities' list includes 'Lead', 'Letter', 'Phone Call', 'Project', 'Project Service Approval', 'Project Task', and 'Recurring Appointment'. The 'Selected Entities' list currently contains 'Appointment'. A red box highlights the '>>' button, which is used to move selected entities from the available list to the selected list.

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, displaying the rule's name, description, and execution criteria. The 'Execution Criteria' section shows the 'Criteria Mode' set to 'Simple' and the '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 'Queue' section shows the rule is assigned to the 'Leads from Website' queue. A note at the bottom states: '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.'



The screenshot shows the 'Assignment Properties' section. The 'Assignment Algorithm' is set to 'Round Robin'. The 'Open Work Item Statuses' section shows the rule is configured to open work items with the status 'Open-Contacted' and 'Open-New'. The 'Maximum Work Items Allowed To Be Assigned' is set to 5.

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