Lead.Assign.Distribute

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User Manual

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Introduction

Lead Assignment And Distribution Automation is a productivity app that enables systematic allotment/assignment of leads to respective Dynamics 365 CRM users. It helps managers to allocate and distribute incoming leads and customer queries in an organized way. This ensures fair distribution of workload within each team. Automated distribution and assignment improves efficiency which results in higher level of customer satisfaction and in turn higher ROI.

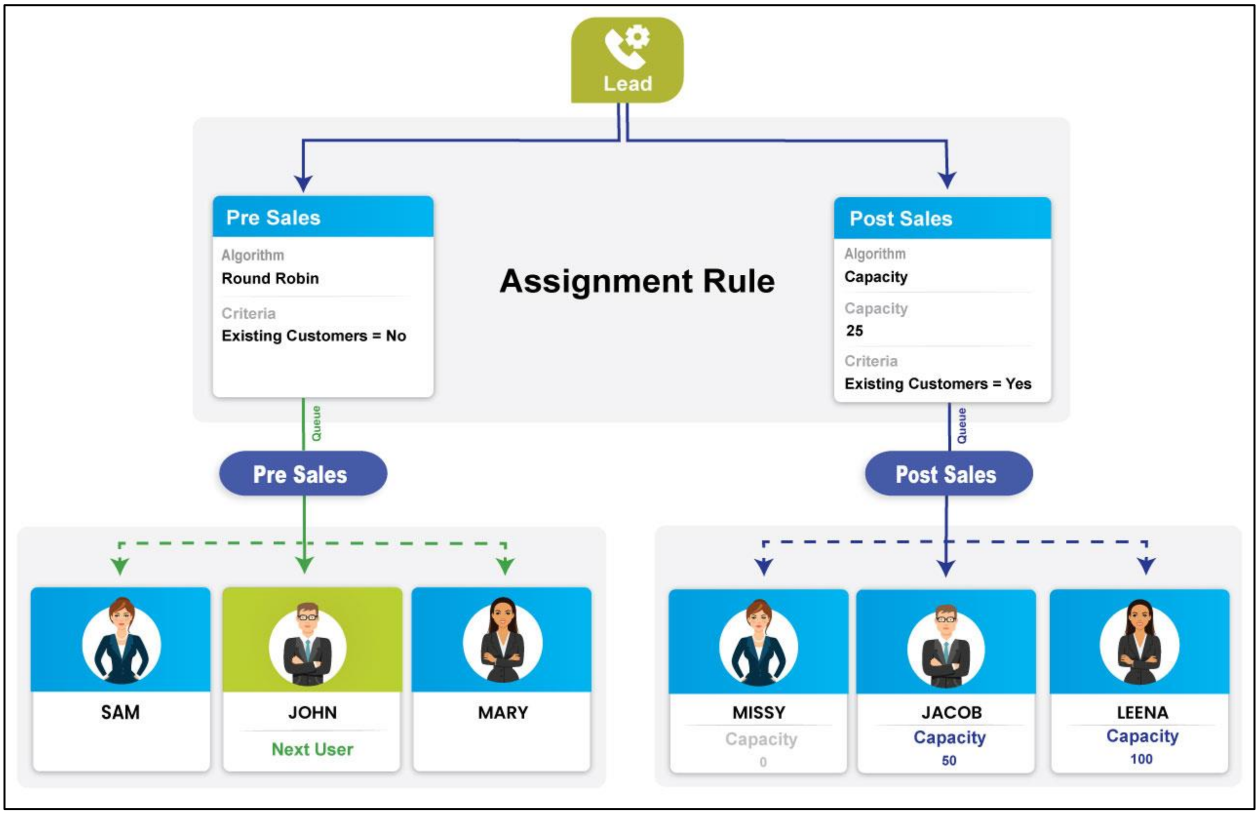
Salient Features:

- 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

Available for: Microsoft Dynamics 365 CRM 9.x
Deployment: On-Premises, Online and Partner-Hosted

Understanding working of Lead Assignment

The following diagram illustrates the scenario to understand how Lead Assignment And Distribution Automation works.



In this example, there are two types of leads coming into the CRM system. The leads from new customers and the leads from the existing customers. Two teams have been created in the organization to work on these leads. The 'Pre Sales' team to work on the leads that has been coming from the new customers and another team 'Post Sales' to work on the leads that has been coming from the existing customers.

For both the team two different queues have been created and appropriate number of members added into it. In the above example, two Assignment Rules have been created – One, to distribute Pre Sales leads among the members of the 'Pre Sales' queue in Round Robin fashion and another Assignment Rule to distribute the Post sales leads among the members of the 'Post Sales' queue based on the individual capacity. In each of these two Assignment Rules appropriate criteria and algorithm have been defined. In Post Sales assignment rule, Capacity unit has been defined to 25.

When a new lead with no existing customer enters into CRM or is created in CRM, the assignment process identifies the Queue as 'Pre Sales' queue and then identifies the user to which the new lead is to be assigned. In Round Robin, the process checks who is the next user to be assigned and then continues the assignment in the loop.

When a new lead with existing customer enters into CRM or is created in CRM the assignment process identifies the Queue as 'Post Sales' queue and then identifies the user with sufficient capacity to handle the lead. As the capacity unit has been set to 25, the capacity of new incoming lead is equivalent to 25. In order to assign this lead to the user, the user must have the available capacity as 25 or above. In this example, Jacob's capacity is 50, so the lead gets assigned to him. Once the lead is assigned to him, the available Capacity of Jacob is reduced by 25. Now, his capacity will be just 25.

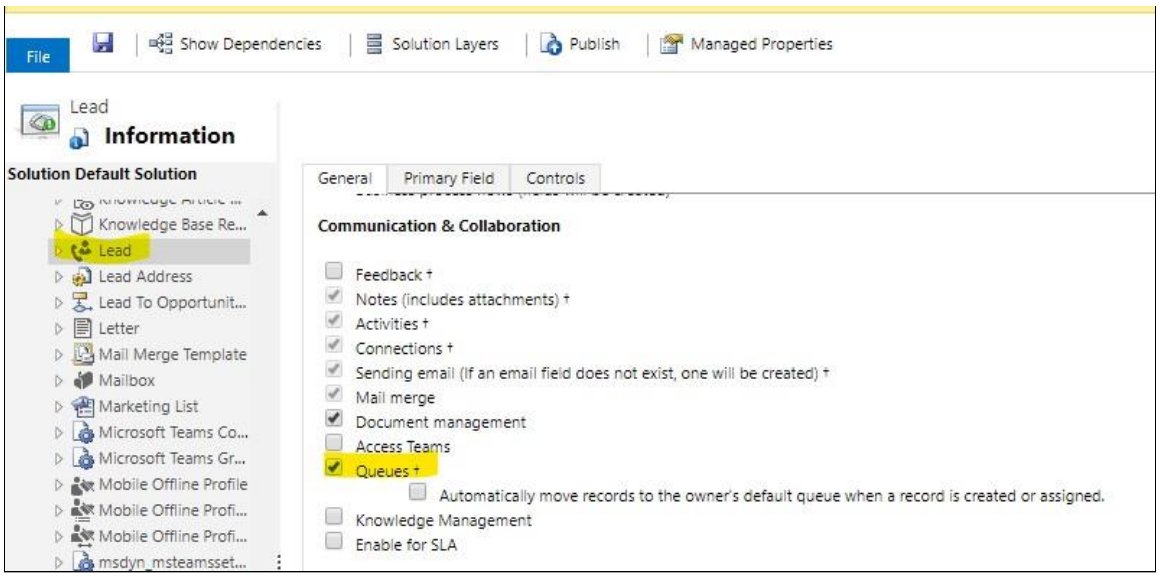
Assignment Configuration

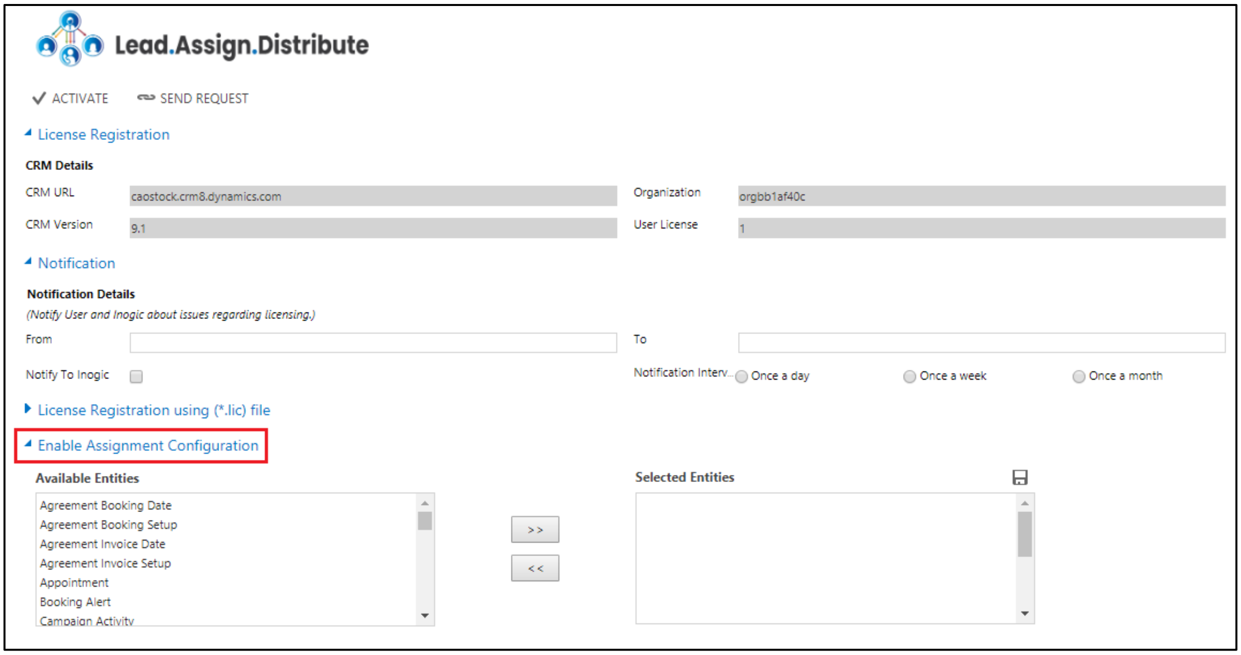
As mentioned in the features list this application support automated assignment for lead and other entities too.

In order to assign leads for OOB and custom entities, Assignment Configuration for that entity needs to be enabled.

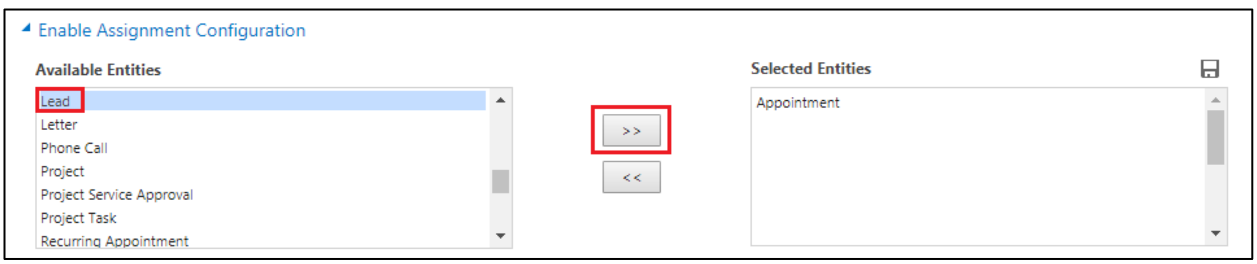
1. To enable Assignment Configuration navigate to **Lead Assignment And Distribution Automation App → License Registration → Enable Assignment Configuration.**

Note: To enable assignment configuration it is necessary to enable Queue for OOB entities.

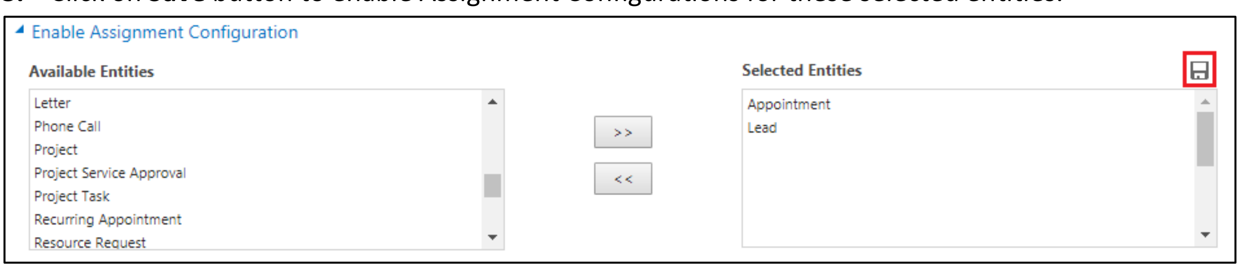




2. Users can select the entities from the list of **Available Entities** and move them to the list **Selected Entities.**

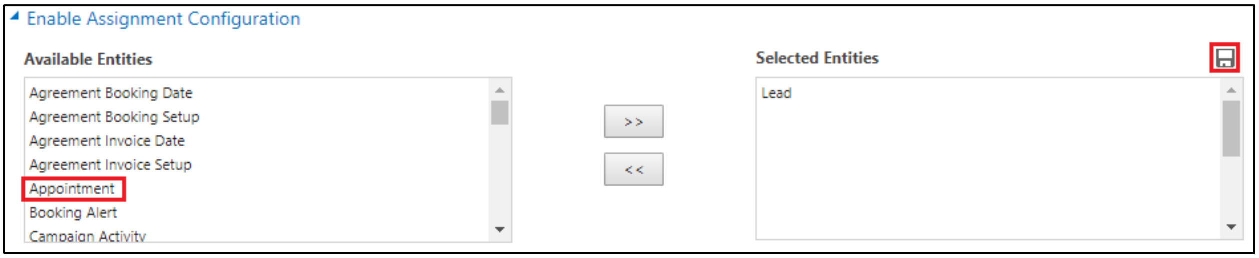


3. Click on **Save** button to enable Assignment Configurations for these selected entities.

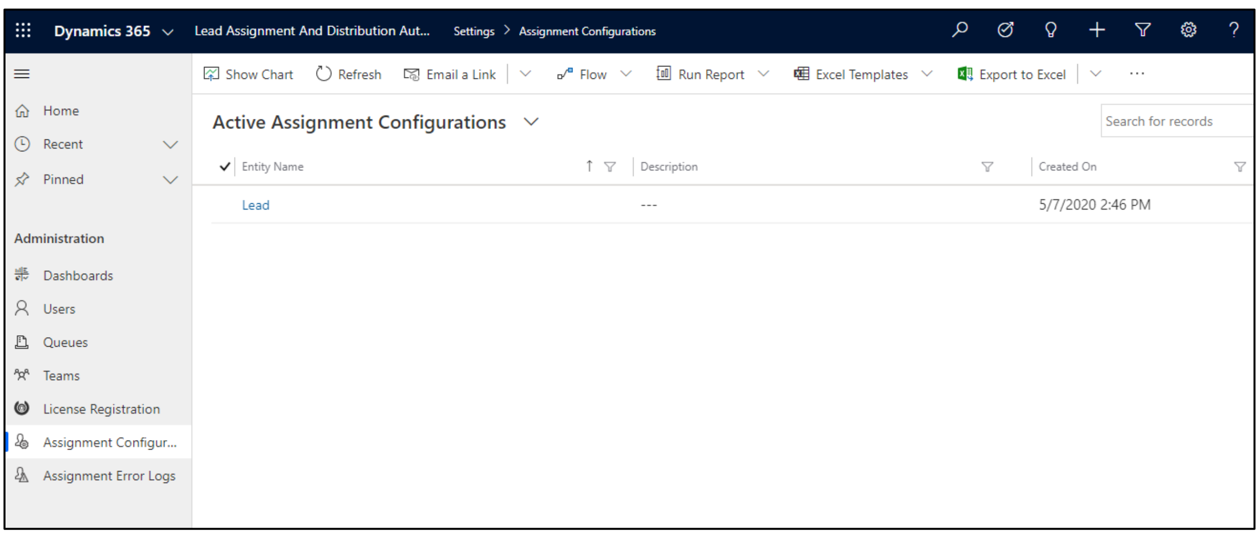


4. At any time users can disable the Assignment Configuration for a particular Entity by removing the entity from **Selected Entities** list.

5. You can see Appointment has been removed from **Selected Entities** grid and is now again available in **Available Entities** grid. Click on **Save** in order to retain these settings.



6. To view the Assignment Configurations go to **Lead Assignment And Distribution Automation App → Assignment Configurations** where all the enabled Assignment Configurations can be viewed.



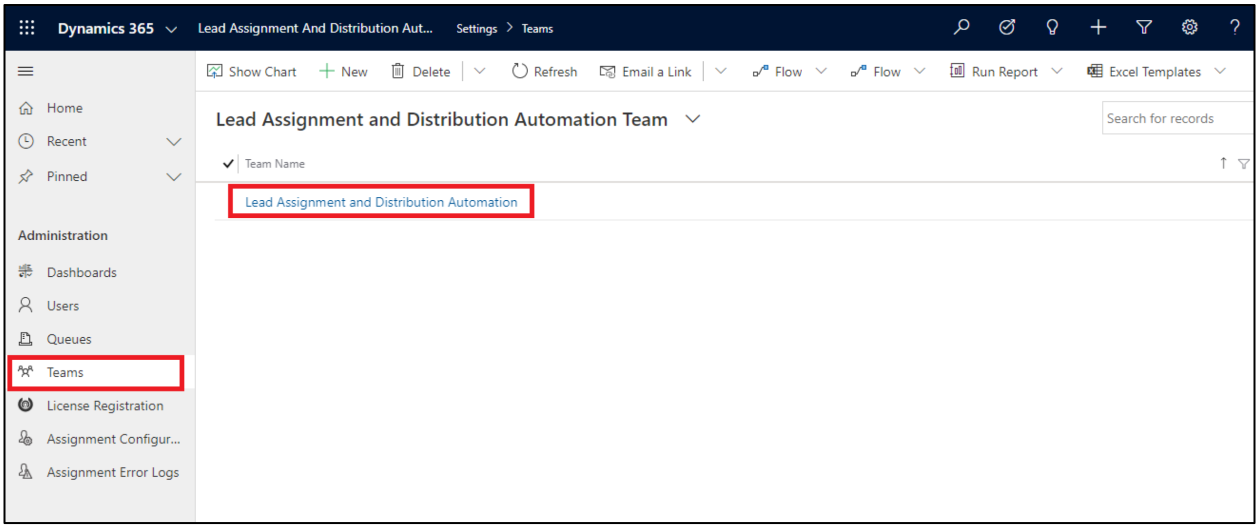
Set up Users

To assign Leads generated from various sources to the users, first it is necessary to set up the users who will be automatically assigned leads or other entity records. After you install the solution and activate the license, a team named as ‘Lead Assignment And Distribution Automation’ gets created in CRM.

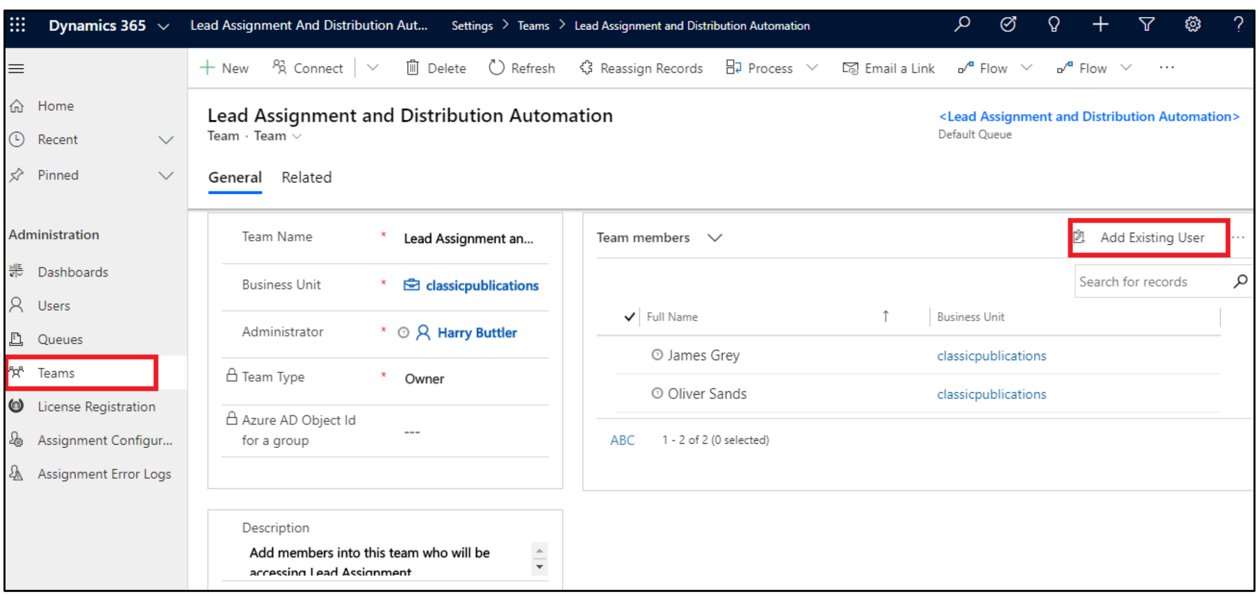
Add all the users whom you want to assign leads automatically through this application in the ‘Lead

Assignment And Distribution Automation’ team. To add team members follow the steps given below:

1. Navigate to **Lead Assignment And Distribution Automation App→Administration→Teams.**



2. Select the team ‘Lead Assignment And Distribution Automation’, add team members and click on ‘Save’.

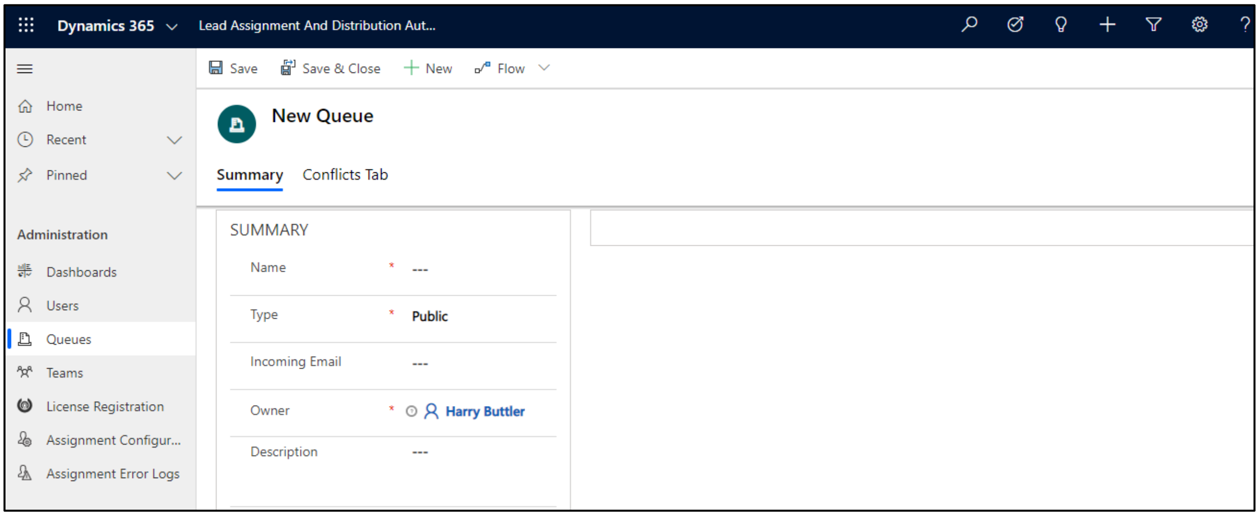


Also the users that have been added in the team must have **‘Lead Assignment And Distribution Automation User’** security role.

Set up Queues

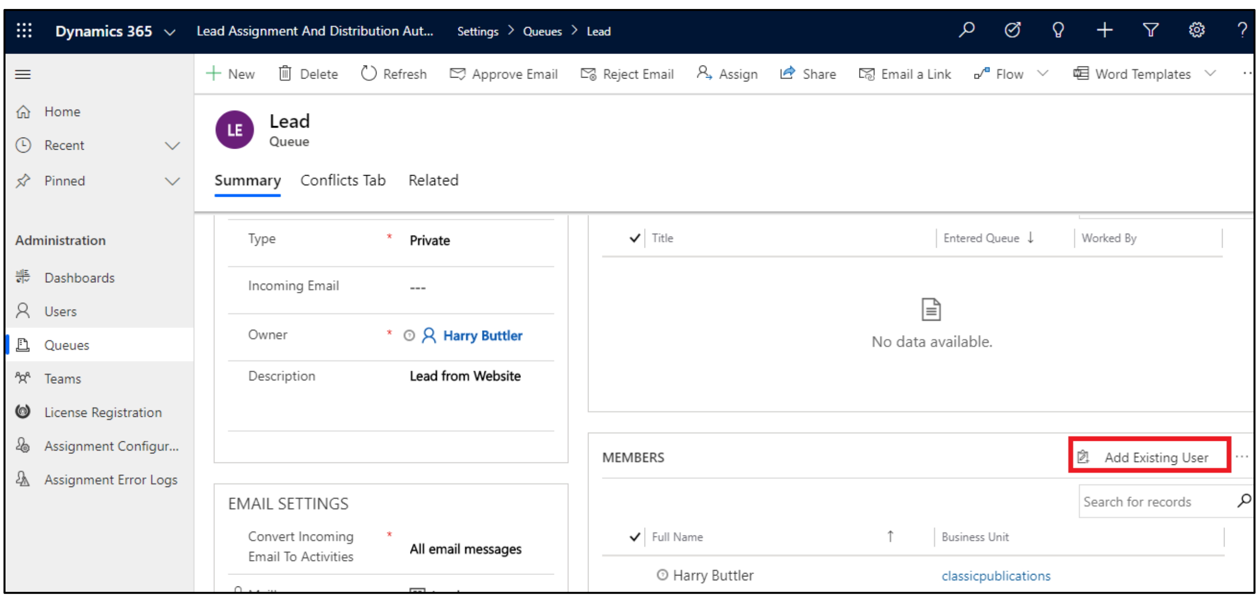
Once the members are added to the teams, next step is to set up Queues. It is necessary to add members to Queue in order to assign Leads to the respective users. If you have existing private queues then use that or create new queues. Follow the steps given below to create a new queue:

1. Navigate to **Lead Assignment And Distribution Automation App→Administration→Queues**. Click on **'New'**.



2. Enter details into respective fields and click on 'Save'.
   - **Name:** Give name to the Queue. For e.g. Lead
   - **Type:** Select **'Private'**, as by default it is set as 'Public'.
   - **Description:** Provide description, for e.g. Lead from website.

   Once it is saved, you can add members to the Queue.



Assignment Rules

Leads are assigned or distributed based on two methods:

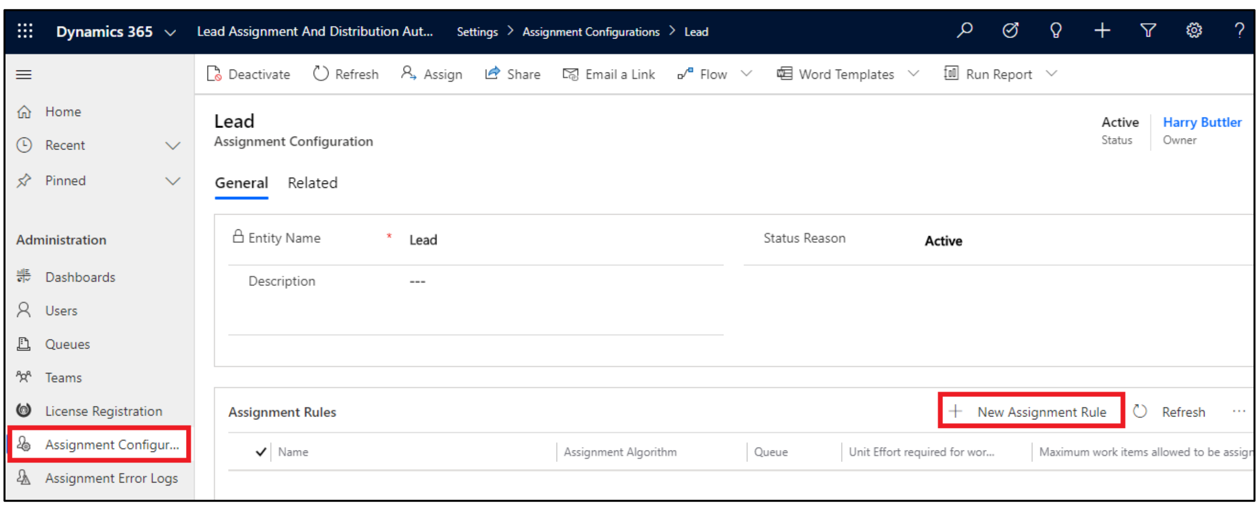
1. **Round Robin**
2. **Capacity**

Round Robin

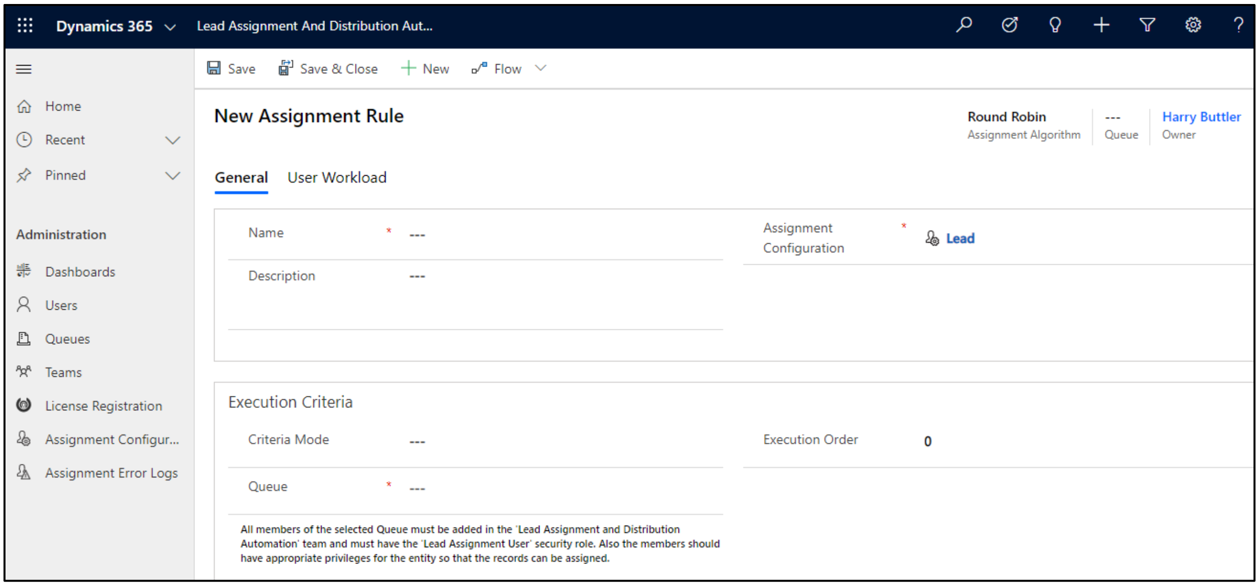
In this method, users are assigned Leads in sequence. For e.g. Consider there are 3 members in a team namely – A, B & C. With Round Robin method, the first Lead will be assigned to A, the second Lead to B, third Lead to C and the fourth Lead will be again assigned to A. In this sequence Leads will be assigned to the users.

To assign Leads as per Round Robin method, follow the steps given below:

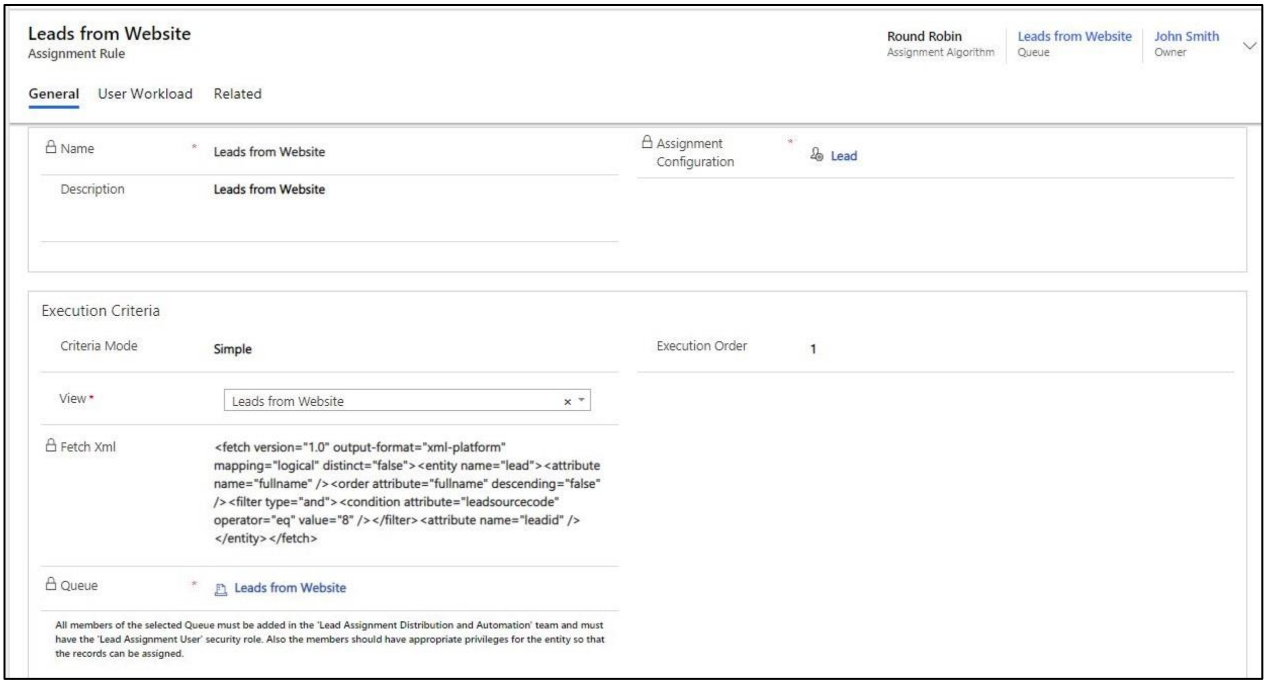
a) Navigate to **Lead Assignment And Distribution Automation App→Administration→Assignment Configuration→Select the respective Assignment Configuration→ Click on New Assignment Rule**.



b) Enter mandatory field details as illustrated below and click on 'Save'.

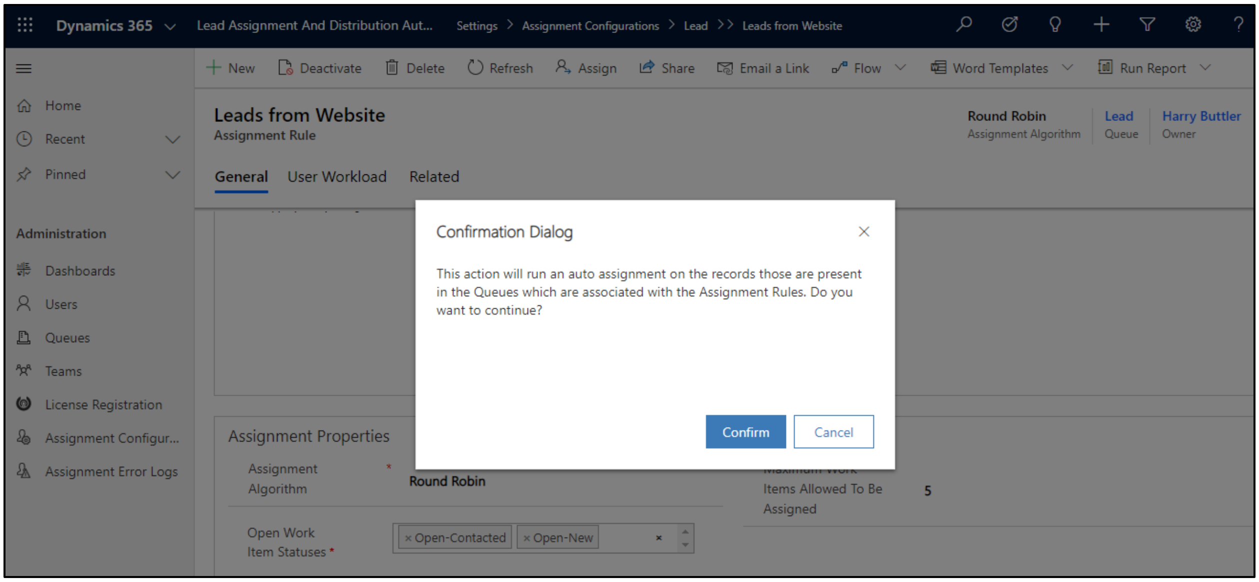


- **Name:** Give name, for e.g. Leads from Website
- **Assignment Configuration:** Select respective configured Entity, for e.g. Lead.
- **Description:** Provide description, for e.g. Lead from Website.
- **Criteria Mode:** Select between ‘Simple’ or ‘Advanced’ criteria mode. ‘Simple’ mode is based on ‘Views’ and ‘Advanced’ is based on Fetch Xml. Here, Simple mode is selected.
- **Execution Order:** Give numeric value, for e.g. 1. If there are two or more Round Robin based Assignment Rules then this field states the order in which Rules are to be executed while assigning Leads.
- **Queue:** Select the respective Queue.
- **Assignment Algorithm:** Select between Round Robin and Capacity. Here we selected Round Robin.
- **Max Work Items Allowed to be Assigned:** This field denotes the maximum number of work items that is allowed to be assigned to users. For example – 5. Here, each user will be assigned maximum 5 Leads.
- **Open Work Item Statuses:** Select the status from the dropdown, for e.g. Open-New. Here, based on the status ‘Open-New’ Leads will be assigned to users. Once the Lead ‘s status changes from Open-New to another status then then that Lead will be considered as completed and automatically another Lead with status as ‘Open-New’ is assigned to the same user. This process will go on till all the Leads are assigned.



Updation of 'Max Work Items Allowed to be Assigned' field

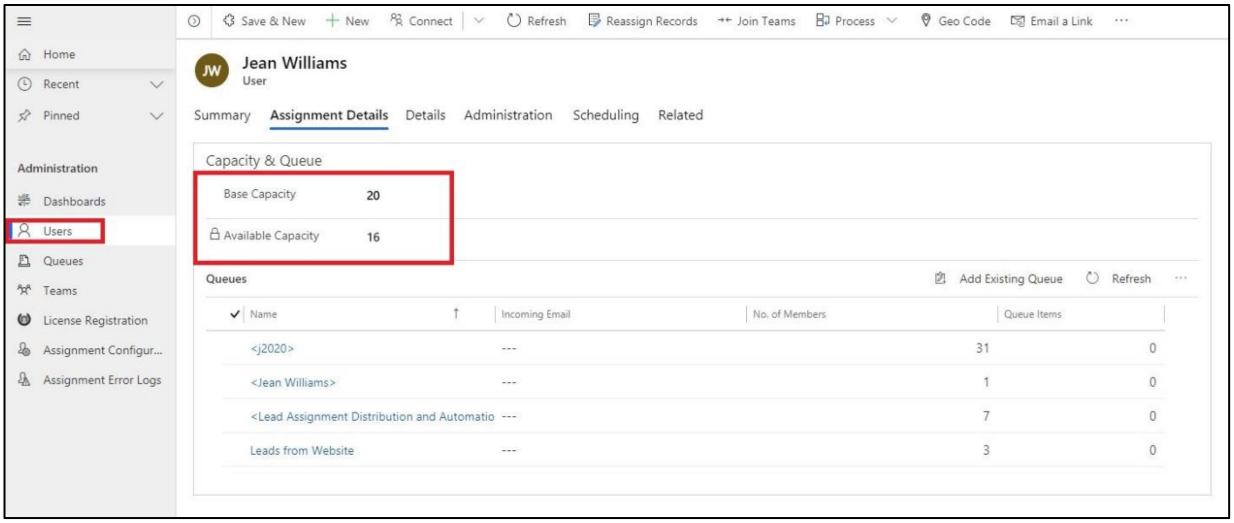
It is quite easy to update the maximum number of work items allowed to be assigned to the users. Just go to the existing 'Assignment Rule' and enter new value in the **'Max Work Items Allowed to be Assigned'** field. Once the new value is entered, a dialog box will appear asking for confirmation. Click on **'Confirm'** tab to update the new value. Now, records that are present in the Queues which are associated with the Assignment Rule will be auto assigned to the users as per the updated value.



<u>Capacity</u>

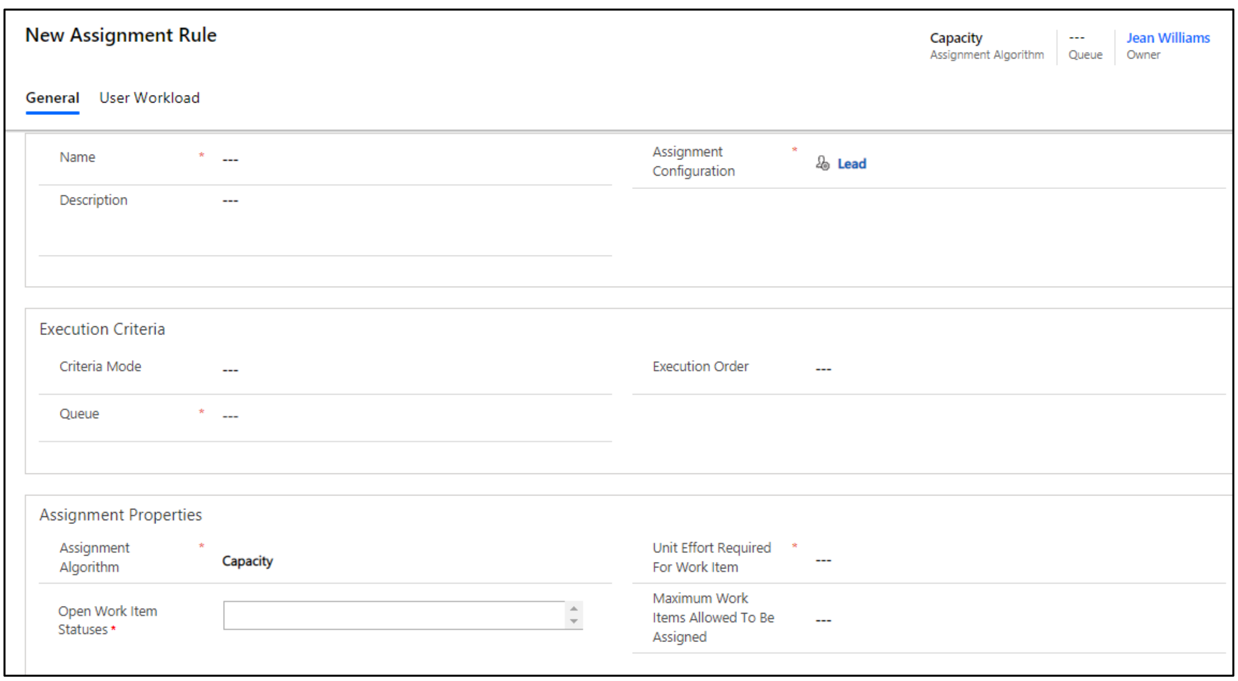
Leads are assigned on the basis of user capacity. Each user is assigned a base capacity by the manager. For e.g. Let's consider that 1 Lead is equivalent to 5 units. Based on this A is given capacity of 5 units, B is given capacity of 10 units and C is given capacity of 12 units. As Lead comes it is systematically assigned to A, B and C. Now depending on capacity A has zero units left whereas B has 5 units and C has 7 units left. This is automatically highlighted in the 'Available Capacity' field of each user. So, the next Lead will be assigned to B and then C. The 'Available Capacity' field is auto-populated as per available capacity of user. Here, if A closes the Lead then the 'Available Capacity' field will auto-populate and display 5 units against A. Now, A is eligible to be assigned incoming Leads. In this way, on the basis of available user capacity Leads will be assigned to each user.

Before creating Assignment Rule based on Capacity Assignment Algorithm, it is necessary to specify capacity of each user. To specify user capacity, **go to Lead Assignment And Distribution Automation App→ Administration→Users→Lead Assignment Users→Select User→Assignment Details→Populate Base Capacity field→Click on 'Save'**.



Now to assign Leads on the basis of User Capacity follow the steps given below:

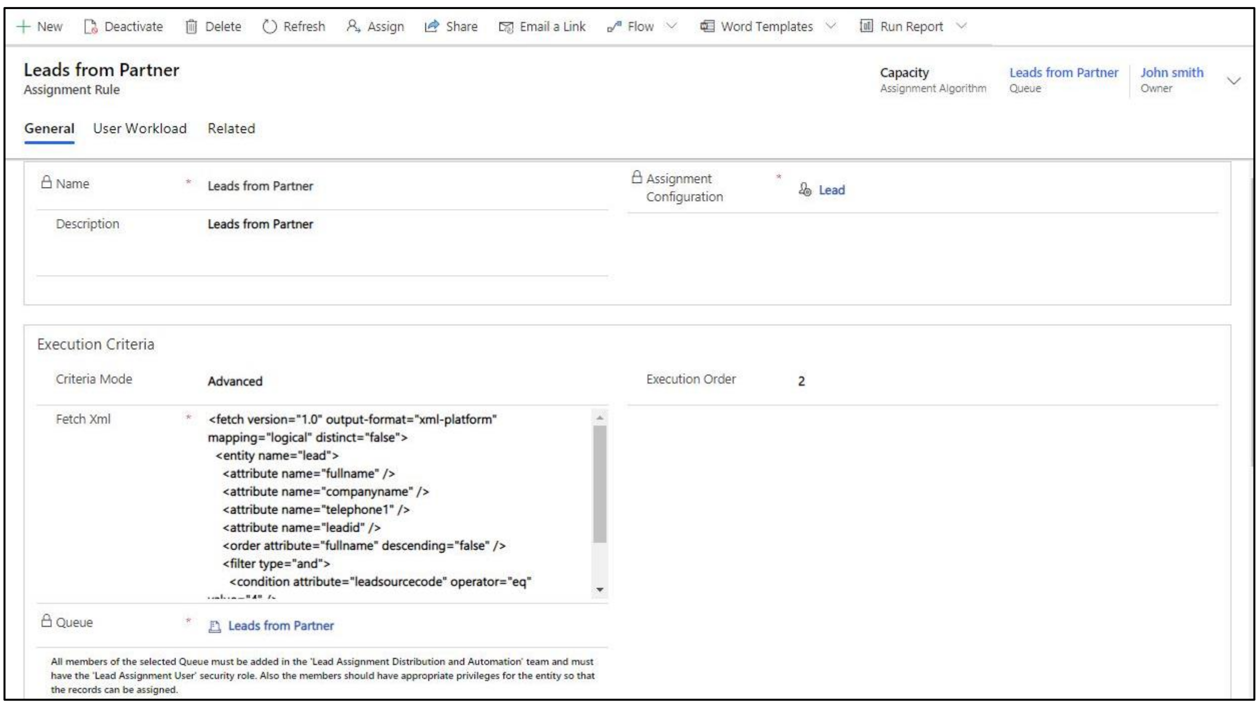
a) Navigate to **Lead Assignment And Distribution Automation App→Administration→Assignment Configuration→ Select the respective Assignment Configuration → Click on New Assignment Rule.**

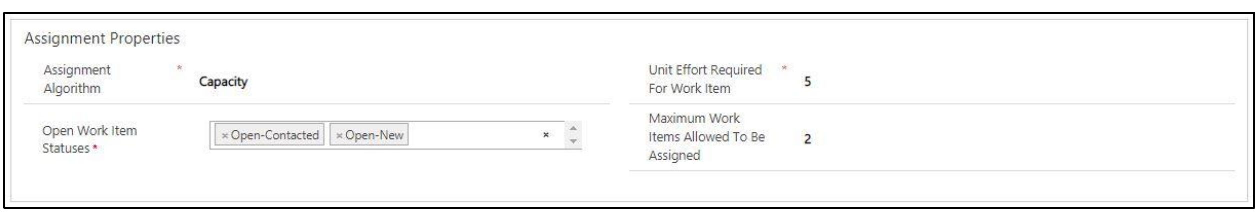


b) Enter the mandatory details and click on ‘Save’.

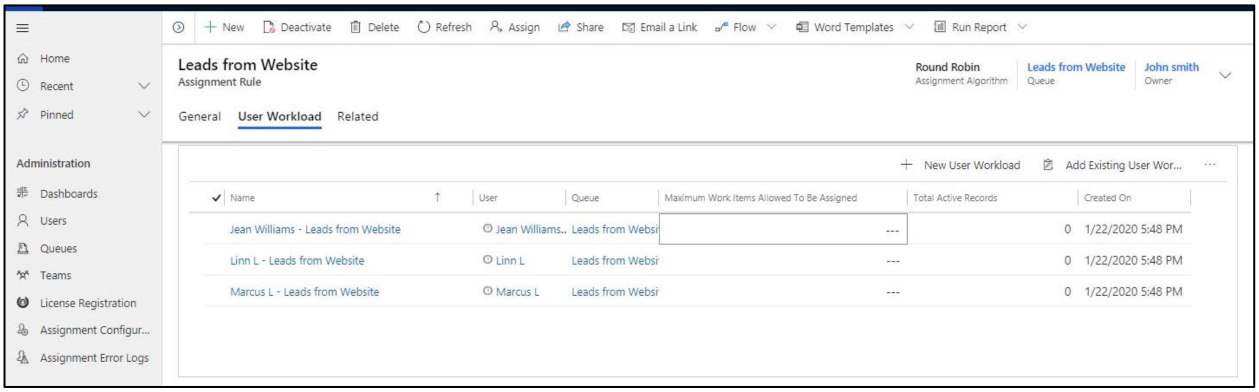
- **Name:** Give name to the Assignment Rule. For e.g. Leads from Partner
- **Assignment Configuration:** This field is auto-populated.
- **Description:** Provide description
- **Criteria Mode:** Select between ‘Simple’ or ‘Advanced’ criteria mode. ‘Simple’ mode is based on ‘Views’ and ‘Advanced’ is based on Fetch Xml. Here, Advanced mode is selected.

- **Execution Order:** Give numeric value, for e.g. 2. If there are two or more Round Robin based Assignment Rules then this field states the order in which Rules are to be executed while assigning Leads.
- **Queue:** Select the respective Queue
- **Assignment Algorithm:** Select between Round Robin and User Capacity. Here we selected Capacity. Once the field is populated another field – **Unit Effort Required For Work Item** – becomes visible.
- **Unit Effort Required For Work Item:** Define the units required for per work item. For example: 1 Lead = 5 units.
- **Max Work Items Allowed to be Assigned:** This field denotes the maximum number of work items that is allowed to be assigned to users. For example – 2. Here, each user will be assigned maximum 2 Leads.
- **Open Work Item Statuses:** Select the status from the dropdown, for e.g. Open-New. Here, based on the status 'Open-New' Leads will be assigned to users. Once the Lead's status changes from Open-New to another status then that Lead will be considered as completed and automatically another Lead with status as 'Open-New' is assigned to the same user. This process will go on till all the Leads are assigned.

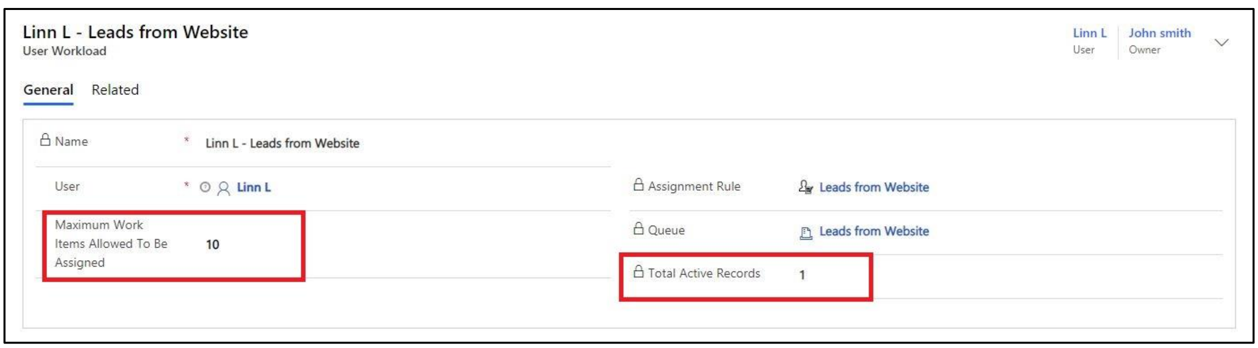


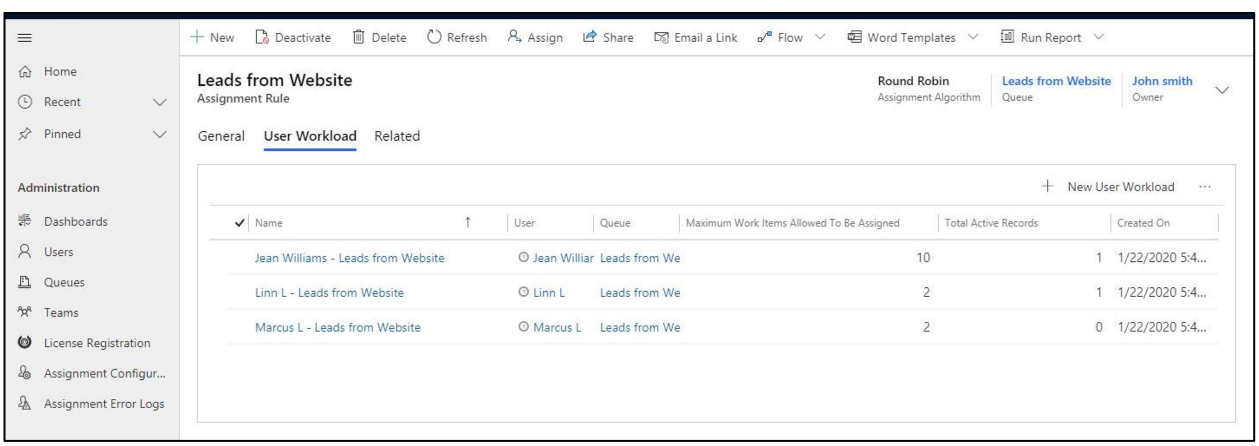


c) Next go to second tab – User Workload. Every individual user has their own capacity and has their priority to work on new items. A senior member can work on more items than a junior member. User Workload is used to handle such cases. The User workload records get created when "Assignment Rule" records get created and when new member is added in the queue (which is set on the Assignment Rule).



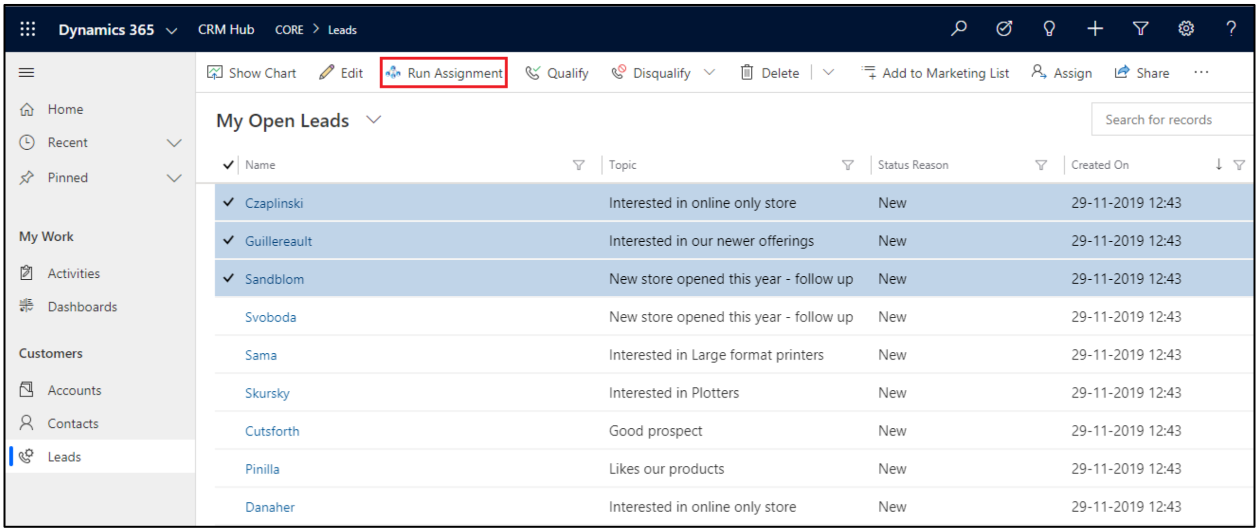
d) Click on any one user and get detailed workload information about that particular user. It gives you information about the total number of active records owned by the user in CRM. Further, you can also update the maximum records assigned to user.





Auto-Assign Existing Leads

Run Assignment is used to auto-assign the already existing Leads (before the installation of solution) in your CRM to respective users as per the newly configured assignment rules. This button is only visible for those entities against which assignment configuration is enabled.

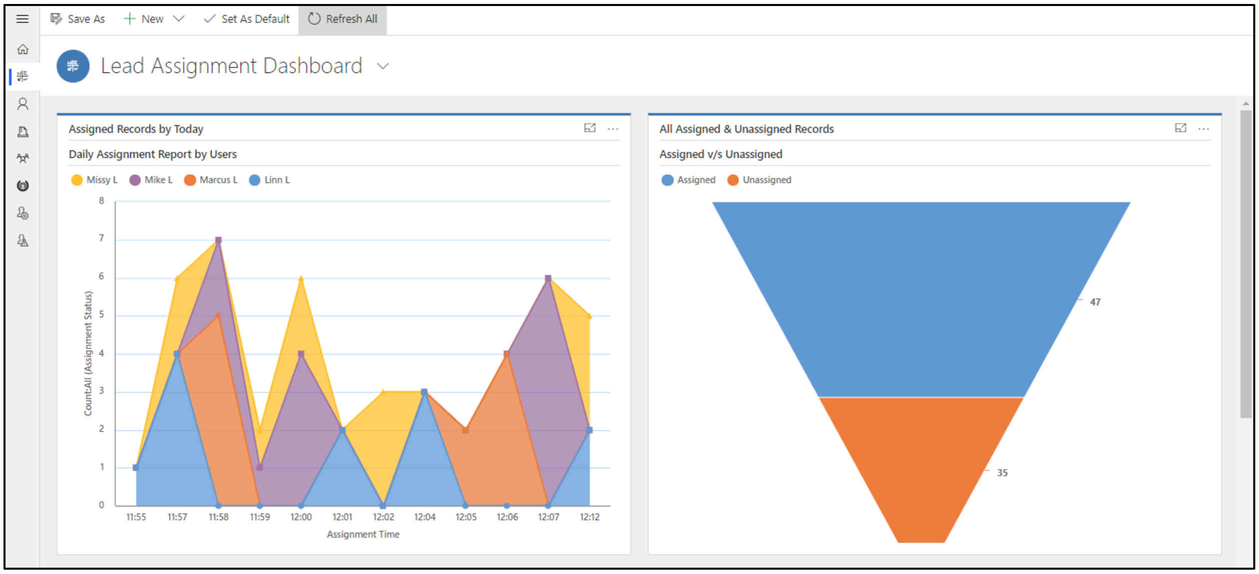


Note:

- ***The maximum records that can be assigned is 20***
- ***This button is only visible to Lead Assignment And Distribution Automation Administrator and System Administrator***

Monitoring & Analytics

Lead Assignment Dashboards provides visual representation of Assigned and Un-assigned Leads through various charts and graphs. Users can create their own dashboards as per customer requirement.



Assignment Error Logs

Errors logs are listed in 'Assignment Error Logs' Entity during any fallout while performing features. If the assignment is not working then look for Assignment Error Logs entity records. We can use this logs to troubleshoot the issue.

Contact Us

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