



**Lead.Assign.Distribute**

**Automatic Assignment and  
Distribution of Leads using  
Round Robin & Capacity  
Algorithm**



**Lead.Assign.Distribute**

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# 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

Dynamics 365

Lead Assignment And Distribution Aut...Settings > License Registration

HomeRecentPinnedAdministrationDashboardsUsersQueuesTeamsLicense RegistrationAssignment Configur...Assignment Error Logs

Lead.Assign.Distribute

ACTIVATESEND REQUESTCRM URLOrganizationCRM VersionUser LicenseNotificationDetails(Notification User and Inogic about issues regarding licensing.)FromToNotify To InogicNotification Inter\_Once a dayOnce a weekOnce a monthLicense Registration using (\*.lic) fileEnable Assignment ConfigurationIf entity is not appearing in the 'Available Entities' list then check if that entity is enabled for the Queue. To enable it for the queue go to Settings->Customizations-> Select Entity and enable it for the Queue.

Available Entities (Entities that are enabled for Queue)

Agreement Booking Date  
Agreement Booking Setup  
Agreement Invoice Date  
Agreement Invoice Setup  
Appointment  
Booking Alert  
Campaign Activity

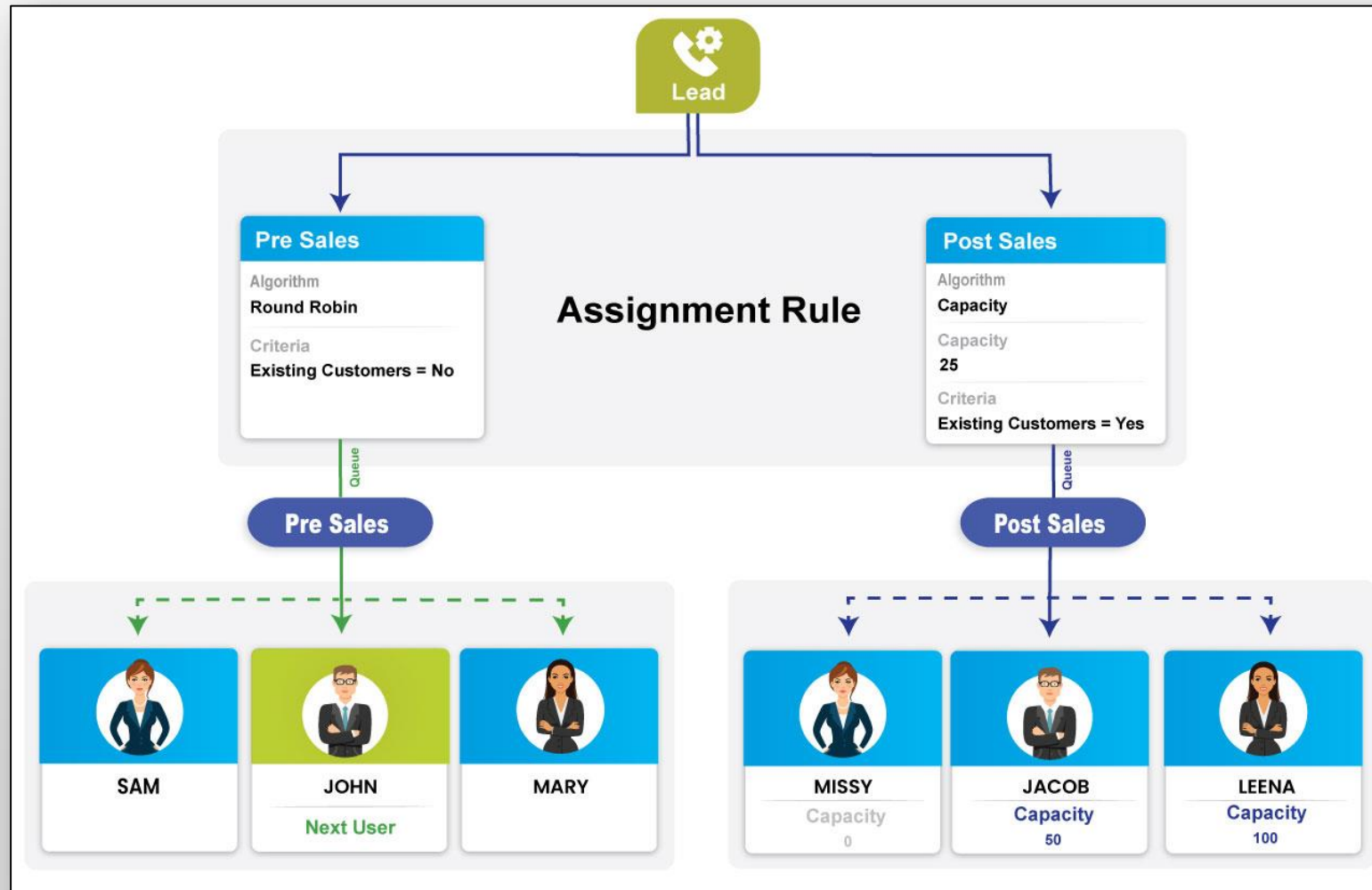
>>  
<<

Selected Entities

Lead



# Lead Assignment Use Case



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

Leads from Website

Assignment Rule

Round Robin

Assignment Algorithm

Leads from Website

Queue

John Smith

Owner

General

User Workload

Related

Name

Leads from Website

Description

Leads from Website

Assignment Configuration

Lead

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

Leads from Partner

Assignment Rule

Capacity

Assignment Algorithm

Leads from Partner

Queue

John Smith

Owner

General

User Workload

Related

Name

Leads from Partner

Description

Leads from Partner

Assignment Configuration

Lead

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" /></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

Maximum Work Items Allowed To Be Assigned

2

Open Work Item Statuses

Open-Contacted

Open-New



# Set up User Capacity for Work Distribution

**Dynamics 365** ▾ Lead Assignment And Distribution Aut... Settings > Users > James Grey

⋮ New ⚙️ Connect | ▾ ↻ Refresh 📄 Reassign Records ↔ Join Teams 📁 Process ▾ 📍 Geo Code 📧 Email a Link ☆ Follow ⋮

**James Grey**  
User

Summary **Assignment Details** Details Administration Scheduling Omnichannel Related

**Capacity & Queue**

Base Capacity	20
Available Capacity	---

**Queues** 📄 Add Existing Queue ↻ Refresh ⋮

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



# On-Demand Assignment Button

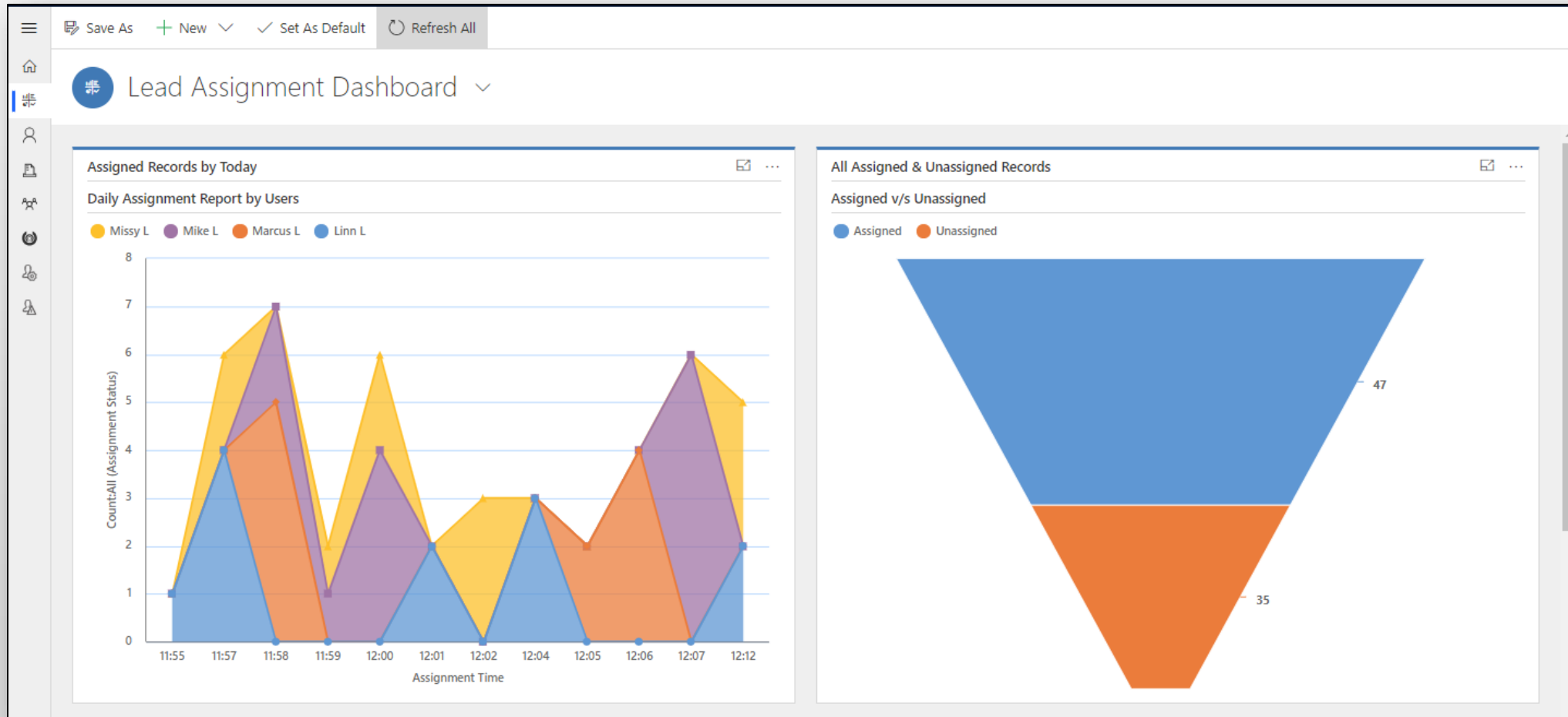
The screenshot shows the Microsoft Dynamics 365 CRM Hub interface. The top navigation bar includes 'Dynamics 365', 'CRM Hub', 'CORE', and 'Leads'. The left sidebar shows navigation options: Home, Recent, Pinned, My Work (Activities, Dashboards), Customers (Accounts, Contacts, Leads), and Leads (selected). The main area displays 'My Open Leads' with a search bar and a table of leads. The 'Run Assignment' button is highlighted with a red box in the top action bar.

Name	Topic	Status Reason	Created On
✓ Czaplinski	Interested in online only store	New	29-11-2019 12:43
✓ Guillereault	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





# Dashboard Visualization



# Next Steps

Learn more about [Lead Assignment And Distribution Automation](#) today.

Get your free **Lead Assignment And Distribution Automation** trial from [Microsoft AppSource](#) or [our website!](#)

Email: [crm@inogic.com](mailto:crm@inogic.com)



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