



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, Power Apps & CDS.

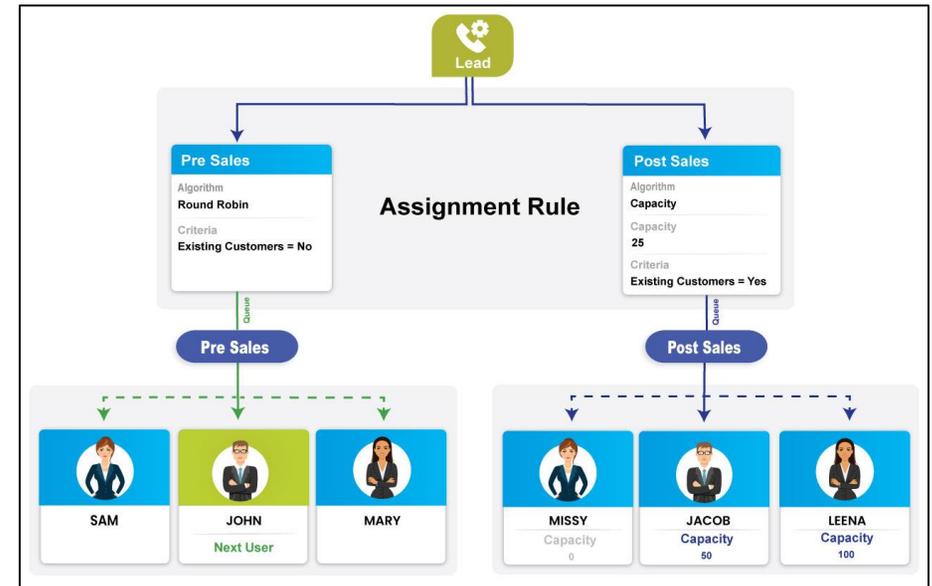
Deployment Models: On-Premises and Online.

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 Dynamics 365 user settings page for James Grey. The left navigation pane includes Home, Recent, Pinned, Administration, Dashboards, Users, Queues, Teams, License Registration, Assignment Configur..., and Assignment Error Logs. The main content area is titled 'Capacity & Queue' and shows the following details:

- Base Capacity: 20
- Available Capacity: ---

Below this is a table of Queues:

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 Dynamics 365 queue settings page for the 'Lead' queue. The left navigation pane includes Home, Recent, Pinned, Administration, Dashboards, Users, Queues, Teams, License Registration, Assignment Configur..., and Assignment Error Logs. The main content area is titled 'SUMMARY' and shows the following details:

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

Below the summary is a 'QUEUE ITEMS' section with a search bar and a table with columns for Title, Entered Queue, and Worked By. The table currently shows 'No data available.'

Assignment Configuration

Enable OOB or Custom entities for automatic assignment.

The screenshot shows the 'Enable Assignment Configuration' page in Dynamics 365. 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 right arrow button (>>) used to move items 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 page for an assignment rule named 'Leads from Website'. The rule is configured with the following details:

- Assignment Rule: Leads from Website
- User Workload: Round Robin Assignment Algorithm
- Related: Leads from Website Queue
- Owner: John Smith

The 'General' tab is active, showing the following configuration:

- Name: Leads from Website
- Description: Leads from Website
- Assignment Configuration: Lead

The 'Execution Criteria' section is configured as follows:

- 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>
          <filter>
            <attribute name="leadid" />
          </filter>
        </entity>
      </fetch>
```
- Queue: Leads from Website

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 entry so that the records can be assigned.'

The screenshot shows the 'Assignment Properties' page for the 'Leads from Website' rule. It displays the following configuration:

- Assignment Algorithm: Round Robin
- Maximum Work Items Allowed To Be Assigned: 5
- Open Work Item Statuses: Open-Contacted, Open-New

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Capacity Algorithm:

Leads from Partner
Assignment Rule

General | User Workload | Related

Name: Leads from Partner
Description: Leads from Partner

Assignment Configuration: Lead

Execution Criteria

Criteria Mode	Advanced	Execution Order
Fetch Xml	<pre><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" /> </filter> </entity> </fetch></pre>	2

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

Auto-Assign Existing Leads

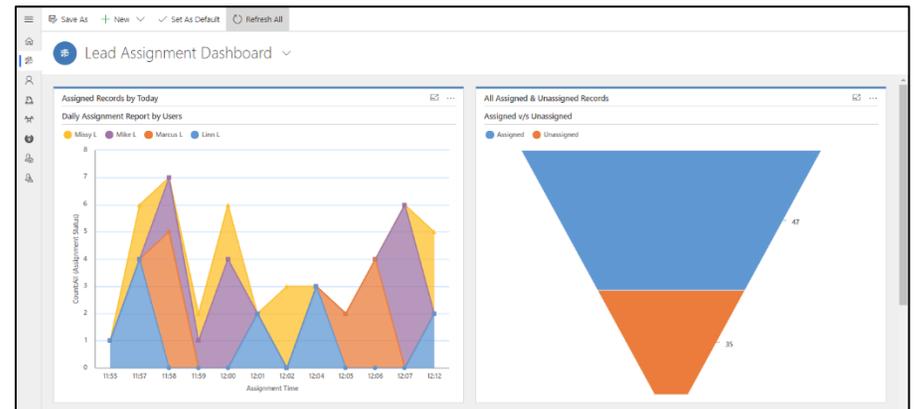
Auto-assign already existing Leads (before the installation of solution) in your CRM to respective users as per the newly configured Assignment Rules with on-demand 'Run Assignment' button.

My Open Leads

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

Dashboards

View charts and graphs for Un-assigned and Assigned Leads on dashboards.



Assignment Error Logs

Errors logs are listed in 'Assignment Error Logs' Entity during any fallout while performing features.

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Contact Us:

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