



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
- Support to set period for assigning work items (entity records)
- Monitor and Analyze distribution of Leads with Dashboards

Supported Versions

Versions: Microsoft Dynamics 365 v9.x and above, Dataverse (Power Apps).

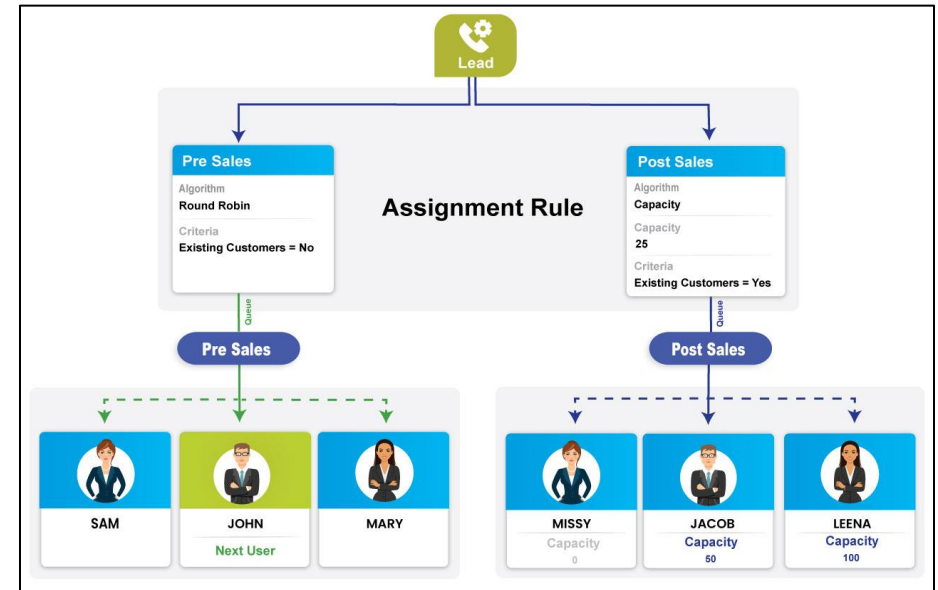
Deployment Models: On-Premises and Online.

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 AND DISTRIBUTION AUTOMATION 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 for James Grey. The 'Capacity & Queue' section displays a Base Capacity of 20 and an Available Capacity of ---. The 'Queues' section contains a table with the following data:

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 for the '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 search bar and a table with columns for Title, Entered Queue, and Worked By. The table is currently empty, displaying 'No data available.'

Assignment Configuration

Enable OOB or Custom entities for automatic assignment.

The screenshot shows the 'Enable Assignment Configuration' dialog box. 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 the selected entity 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 the 'Leads from Website' assignment rule. The 'General' section displays the Name 'Leads from Website', Description 'Assign Leads from website', and Assignment Configuration 'Lead'. The 'Execution Criteria' section shows the Criteria Mode set to 'Advanced' and the Execution Order set to 0. The Fetch Xml is configured as follows:

```
<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" value="8" />  
</filter>  
</entity>  
</fetch>
```

The Queue is set to 'Lead Assignment Queue'. A note at the bottom states: 'All members of the selected Queue must be added in the "Lead Assignment and Distribution 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.'

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Leads from Website
Assignment Rule
Round Robin
Assignment Algorithm
Lead Assignment Queue
Queue

General
User Workload
Related

Assignment Properties

Assignment Algorithm * **Round Robin**

Maximum Work Items Allowed To Be Assigned **5**

Period * **Overall**

Open Work Item Statuses * Open-Contacted Open-New

Lead Capacity Rule
Assignment Rule
Capacity
Assignment Algorithm
Lead Assignment Queue
Queue
Sam Parker
Owner

General
User Workload
Related

Assignment Properties

Assignment Algorithm * **Capacity** Unit Effort Required For Work Item * **2**

Maximum Work Items Allowed To Be Assigned **10**

Period * **Overall**

Open Work Item Statuses * Open-New

Capacity Algorithm:

⚠ 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.

Lead Capacity Rule
Assignment Rule
Capacity
Assignment Algorithm
Lead Assignment Queue
Queue
Sam Parker
Owner

General
User Workload
Related

Name * **Lead Capacity Rule** Assignment Configuration * **Lead**

Description **Assign Lead based on user's capacity**

Execution Criteria

Criteria Mode **Simple** Execution Order **1**

View * All Leads

Fetch Xml

```
<fetch version="1.0" output-format="xml-platform" mapping="logical" distinct="false"
<entity name="lead" > <attribute name="fullname" /> <attribute name="createdon" />
<attribute name="statuscode" /> <attribute name="subject" /> <order
attribute="createdon" descending="true" /> <attribute name="ownerid" /> <attribute
name="leadid" /> </entity> </fetch>
```

Queue * **Lead Assignment Queue**

All members of the selected Queue must be added in the 'Lead Assignment and Distribution 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.

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.

Dynamics 365 CRM Hub CORE Leads
Show Chart Edit **Run Assignment** Qualify Disqualify Delete Add to Marketing List Assign Share

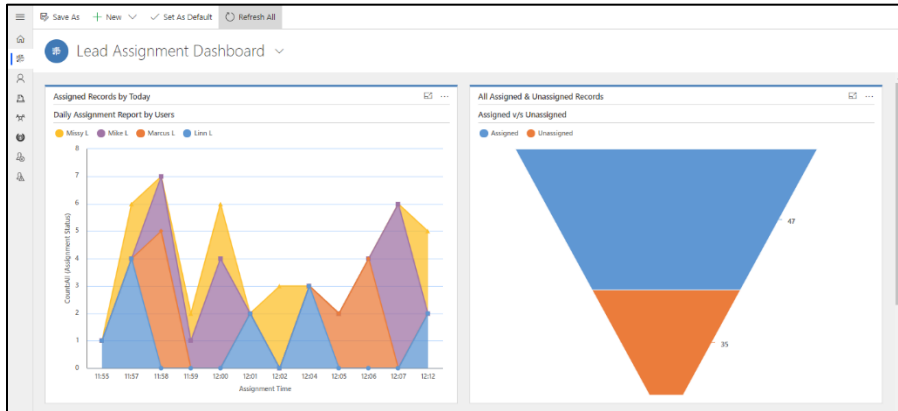
My Open Leads

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

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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.

Contact Us:

INOVIC (MUMBAI - INDIA)

M/S. INOGIC TECH (INDIA) PVT. LTD.
A/301, Everest Nivara InfoTech Park,
TTC Industrial Area, MIDC, Turbhe
Navi Mumbai, Maharashtra 400705
INDIA

E-mail: crm@inogic.com

Skype: [crm@inogic.com](https://www.skype.com/people/inogic)

Twitter: @inogic