

# Inogic's New Solution Helps Businesses Automate Lead Assignment and Distribution in Microsoft Dynamics 365 CRM

NAVI MUMBAI, MAHARASHTRA, INDIA,

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[Inogic](#), the leading provider of productivity apps for Microsoft Dynamics 365 CRM, proudly presents [Lead Assignment and Distribution Automation](#), the game-changing solution that transforms lead management processes and empowers businesses to supercharge their sales operations. Lead Assignment and Distribution Automation automates the allocation of leads to the most suitable team members, precisely when it matters.



## Seamless Lead Allocation, Effortless Results

Inogic's Lead Assignment and Distribution Automation empowers businesses to revolutionize their sales efforts by automating the allocation of leads to the most suitable team members at the precise moment. Leveraging the robust capabilities of Microsoft Dynamics 365 CRM, this innovative tool goes above and beyond the built-in functionality, offering three distinct functionalities that set it apart:



Inogic's Lead Assignment and Distribution Automation feature simplify the entire lead management process, saving time, optimizing resources, and improving the bottom line."

*Inogic CEO, Roohi Shaikh*

- **Workflow Lead Assignment:** With a simple click on update, it can seamlessly move leads from one stage to another and assign them accordingly. Through the smart lead assignment, the tool automatically allocates leads to

different users based on specific actions, including lead conversion or identifying a "hot" lead during an update to existing leads. This ensures that leads are routed to the most suitable team members, resulting in an enhanced customer experience and increased conversion rates.

- **Recurring Assignment Periods:** Take complete control over lead distribution with flexible

recurring assignment periods, determined by the maximum number of work items to be assigned. Whether it's daily, weekly, or monthly, leads are automatically distributed among team members on a rotational basis. This eliminates workload imbalances, enhances productivity, and guarantees an equitable distribution of leads across the team.

- Customizable Assignment Sequences: Assign leads to users in a specific order based on your business priorities. For instance, optimize resource allocation by assigning the sequence to the user with the highest lead conversion rate, and the tool will automatically assign rules based on the defined sequence in future. This empowers you to fine-tune lead assignment strategies according to your unique business needs, maximizing efficiency and results.

"Inogic's Lead Assignment and Distribution Automation feature simplifies the entire lead management process, saving time, optimizing resources, and improving the bottom line," said Roohi Shaikh, CEO at Inogic. "Effective lead management is crucial for businesses aiming to achieve their sales targets. Our tool empowers businesses to automate lead assignments based on workflow, recurring periods, and customizable sequences, allowing them to focus on what matters most - closing deals."

Revolutionize the work item distribution process with its powerful features such as round-robin distribution, capacity-based assignment, user availability management, and periodic assignment. Customize user sequences, create assignment rules, and effortlessly monitor work item progress. With a single click, auto-assign existing work items for streamlined distribution. Experience the benefits of streamlined lead management, improved collaboration, and enhanced sales performance.

About Inogic: Your Trusted Microsoft Gold ISV Partner

Experience limitless possibilities with Inogic, the leading Microsoft Gold ISV Partner for Dynamics 365 CRM and Power Platform. Our innovative apps enhance functionality, boost user adoption, and skyrocket productivity. Trusted by clients across more than 50 countries, Inogic caters to every aspect of your CRM requirements, offering a diverse range of innovative apps. Explore the world of geospatial mastery with [Maplytics](#), immersing yourself in immersive visualization through Kanban Board and Map My Relationships. Effortlessly elevate user adoption with User Adoption Monitor and Gamifics365, and simplify file and storage management with Attach2Dynamics and SharePoint Security Sync. Unleash the untapped potential of productivity with Click2Clone, Click2Export, Undo2Restore, Alerts4Dynamics, and Business Process Checklist. Seamlessly integrate your systems with InoLink and Marketing4Dynamics. Experience hassle-free management of SAAS subscriptions with our Subscription and Recurring Billing Management App. Streamline your business processes to achieve maximum returns on investment. Revolutionize your business with Inogic's offshore development services, delivering top-notch solutions at a fraction of the cost. Stay ahead of the curve with our popular Inogic Blogs, your go-to source for invaluable tips and tricks.

Maximize your success with the power of Dynamics 365 CRM and Power Platform. Visit our website or reach out to [crm@inogic.com](mailto:crm@inogic.com) to transform your business with Inogic. Ignite the

power within your organization!

Sam Kumar

Inogic

+91 22 6768 7804

crm@inogic.com

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