



Q-ASSIGN

Q-assign, the powerful lead & case assignment app, can revolutionize productivity and performance across any Sales or Service team (or, indeed, any Salesforce-centric team). It's available from the AppExchange on a free 30-day trial.

Advanced Salesforce Routing

Q-assign is an Enterprise-level Salesforce app which routes work-items – like Cases, Leads, Opportunities and Work Orders – to the best Salesforce user, considering factors such as expertise, availability, and workload. Configured via a code-free interface, it leverages AI to prioritize and allocate tasks. It can be customized for multiple business units, transforming workforce productivity and effectiveness.

Datasheet

Version 3.0

KEY FEATURES



Dynamic Assignment Rules - Automatically adjusts assignment criteria based on real-time data and conditions



Automated Reassignment – Effectively reassigns records to either different owners or queues, for example, based on inactivity or stages being completed.



Account Matching – Routes Leads, Opportunities, Contacts or other related records to Account record owner or determines ownership via other Account fields.



Omni-channel Routing - Customer interactions (e.g. phone calls, chats, emails) are routed to the right agent based on configurable rules or criteria.



Territory Management - Aligns assignments with geographical or organizational territories for optimized coverage.



Attribute-based Routing - Assigns records based on specific attributes of the task or the recipient.



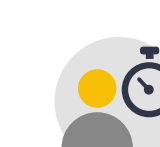
Weighted Round Robin - Distributes Leads, Cases or other records considering both the fairness and individual capacity or performance metrics.



Dynamic Escalations - Automatically escalates Cases, Work items or other records based on urgency or lack of response.



AI Sentiment Analysis - Analyzes customer communications for sentiment, aiding in prioritized routing.



Workload-based Routing - Considers the current workload of team members when assigning new Cases, Leads or other records.



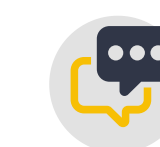
AI-powered actions - Utilizes AI for smarter decision-making in assignments and/or follow up actions post-assignment.



Code Free Configuration - Enables easy setup and customization without the need for programming skills.



Automated Prioritization - Systematically scores, ranks and assigns records based on predefined criteria for efficiency.



Slack & Teams Notification - Integrates with Slack and Microsoft Teams for timely task notifications and updates.

BENEFITS

Enhanced Efficiency and Productivity

Dynamically adjusting assignment criteria and leveraging AI for prioritization significantly improves workforce productivity and operational efficiency.

Optimized Resource Allocation

Workload-based routing and weighted round robin ensures a balanced distribution of tasks based on capacity and performance metrics, optimizing resource allocation.

Increased Assignment Accuracy

Account matching and territory management align tasks with the most suitable team members based on expertise, location, or account ownership, increasing assignment accuracy.

Enhanced Team Coordination

Slack and Teams notifications keep everyone updated in real-time, improving coordination and communication within teams.

Risk Mitigation

Dynamic escalations ensure that urgent tasks are promptly addressed, minimizing the risk of overlooked or delayed responses.

Improved Response Times

Automated reassignment and quick efficient omni-channel to the appropriate team members, leading to faster response times.

Better Customer Experience

AI sentiment analysis and attribute-based routing enable more personalized and effective customer interactions, enhancing overall customer experience.

Reduced Manual Workload

Code-free configuration and automated actions reduce the need for manual intervention in task assignments, saving time and reducing errors.

Scalability and Customization

Fit for multiple business units; scales to accommodate varying volumes of work, making it suitable for businesses of different sizes and sectors.

Streamlined Operations

Automated prioritization and reassignment streamline operational workflows, leading to more efficient and effective work management.

USE CASES

ENHANCED LEAD & OPPORTUNITY MANAGEMENT

In high-volume sales teams, deploy a dynamic assignment system to prioritize the hot leads and high-value opportunities, and assign them to the very best available sales rep. Eliminate cherry-picking and even reassign or escalate neglected leads and opportunities.

ADVANCED CASE ASSIGNMENT

Transform productivity and performance across your service team by matching every Case to the best available service agent. Reduce time-to-first-response and average handle time. Prioritize SLA-bound Cases. Result? Faster resolution, better outcomes, happier customers.

WORK ORDER ASSIGNMENT

Revolutionize the way your field service or facilities team works. Deploy [Email-to-anything](#) to create and update Work Orders automatically from emails, then use Q-assign to assign them, dynamically, to the best available agent or engineer.

TERRITORY-BASED ASSIGNMENT

Automatically allocate work-items based on predefined geographic territories, making sure that agents with local expertise handle each item, thereby improving customer/supplier relationships and increasing productivity and performance.

**For further information please contact
one of our Salesforce Automation Specialists**

Sales Enquiries: sales@ortooapps.com

Technical Enquiries: support@ortooapps.com

Call: 44 (0) 20 3111 1323

ortooapps.com

