mindmatrix

ONE PLATFORM : DIRECT & CHANNEL

How do I create lead routing rules?

Feature:

Admins with lead routing access under the Setup tab may create lead pools in the lead routing section.

These pools will allow the automatic assignment of leads which users may accept or reject.

WARNING:

In order to use this feature properly, any smart lists with competing rules need to be disabled. Otherwise, leads may be shared before they can be routed to the intended user.

Who will be using this?

Marketing managers and Channel Managers in particular; but any users who wish to route leads to other users.

Benefits:

Recipients of leads will receive a notification that a new lead has been received, and have the option to accept or reject the lead.

A report is available for both the admin and the recipient of leads, that will share details on shared lead sources, shared lead accounts, and an overview of all leads shared between the user and admin.

Prerequisites:

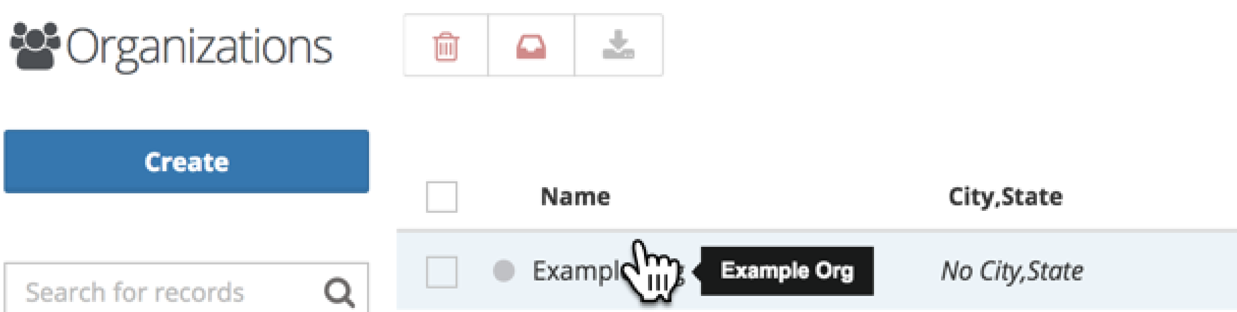
1. A smart list or recipient list to associate with a lead pool. (This is where all leads will be organized).

2. *Removal* of any competing smart lists that may share leads you intend to route.
3. If you are routing leads to entire organizations of users and the organization serves multiple zip codes or territories, a populated “Areas Served” field at the organization level. (This is available under the Setup > Organization section for administrators with organization editing access. Click here to see how to create this field.)
4. If you are routing leads to individual users, an existing value in a user profile field that would determine they should receive a lead. For example, the Country, State, City, or Zip code field. Click here to see an example.

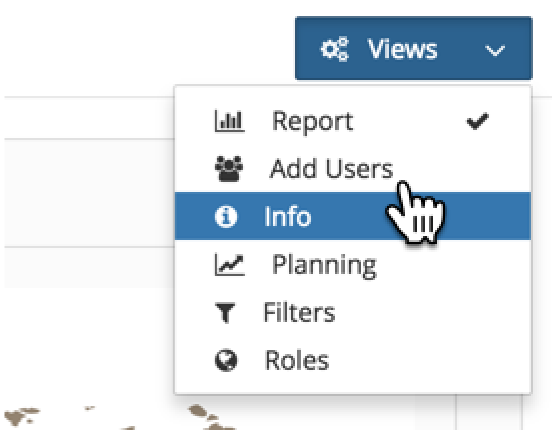
Prerequisites detailed:

1. How do I update the Areas Served field in Organizations to route leads?

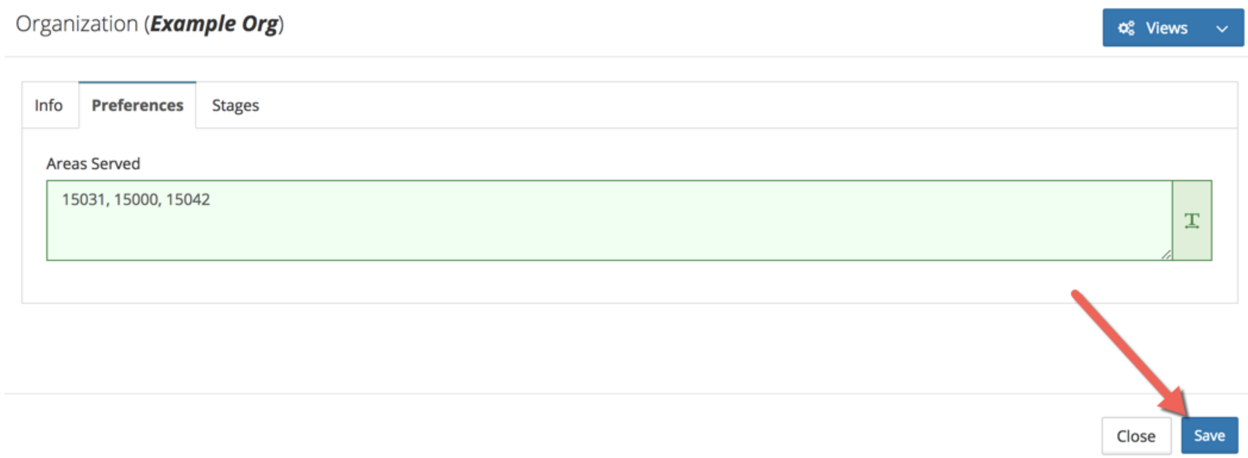
In the Setup > User Management > Organizations section, select the organization that will be a part of your lead routing pool.



Under the Views option,click on Info



Click Preferences and then add in zip codes.



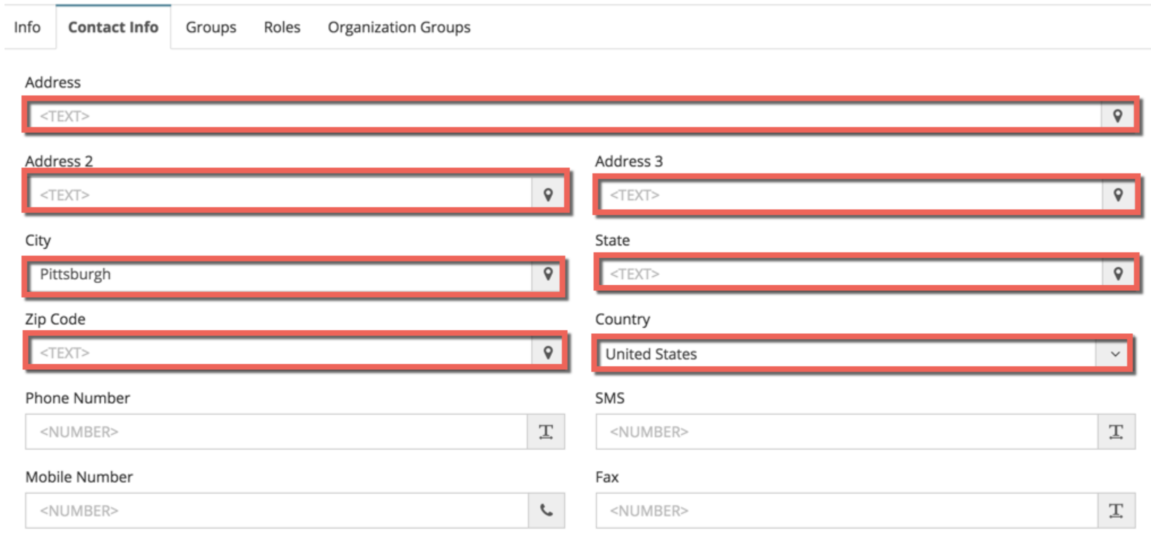
When finished, hit Save.

Now that the organization is updated, you can create a rule that will search the organization for these zip codes to assign leads.

<u>How does this work?</u>

1. We can search by the beginning of each zip code (the first 3 characters) ➔ Use the "Starts with" option when creating your lead routing rule.
2. We can search by each individual zip code (each zip code is separated by a required comma). ➔ Use the "Contains" option when creating your lead routing rule.

2. User profile fields used to route leads:



- Address
- Address 2
- Address 3
- City
- State
- Zip Code
- Country

How does this work?

1. We can search by the beginning of each field (the first 3 characters) → Use the "Starts with" option when creating your lead routing rule.
2. We can search by each field value (each zip code is separated by a required comma). → Use the "Contains" or "Equal to" option when creating your lead routing rule.
3. The value in the User's field used in a rule will be compared to a value you select from the lead.

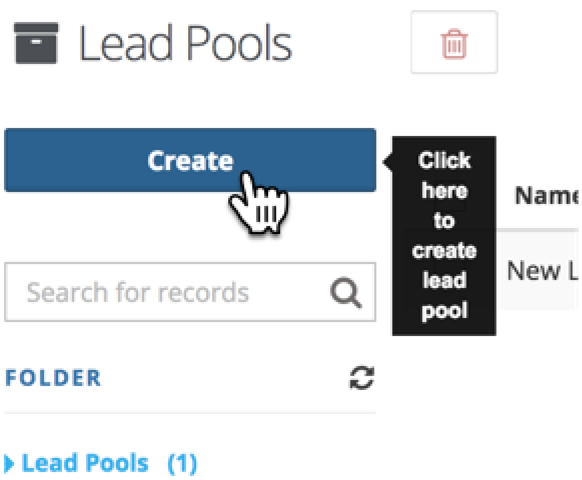
Example:

Process:

1. Create a lead routing pool.

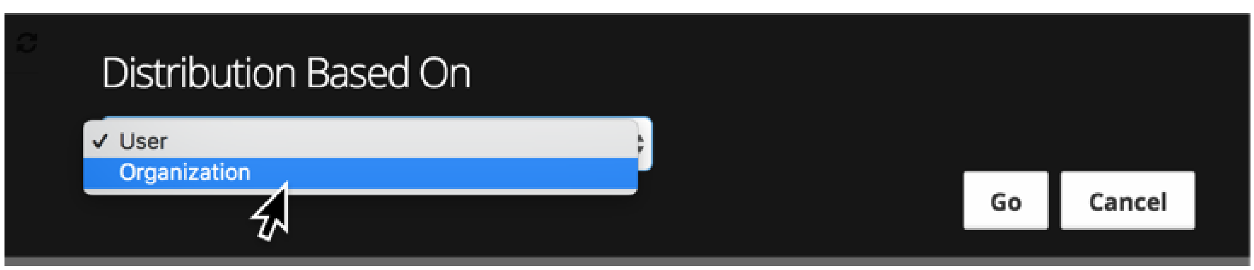
Go to Setup > Admin > Lead Routing

Click the create button.



Select how your pool will be created. Will you route leads based on Users or Organizations?

NOTE Once selected, this cannot be changed. You will need to create a new pool if you wish to change the method of how the leads are distributed.

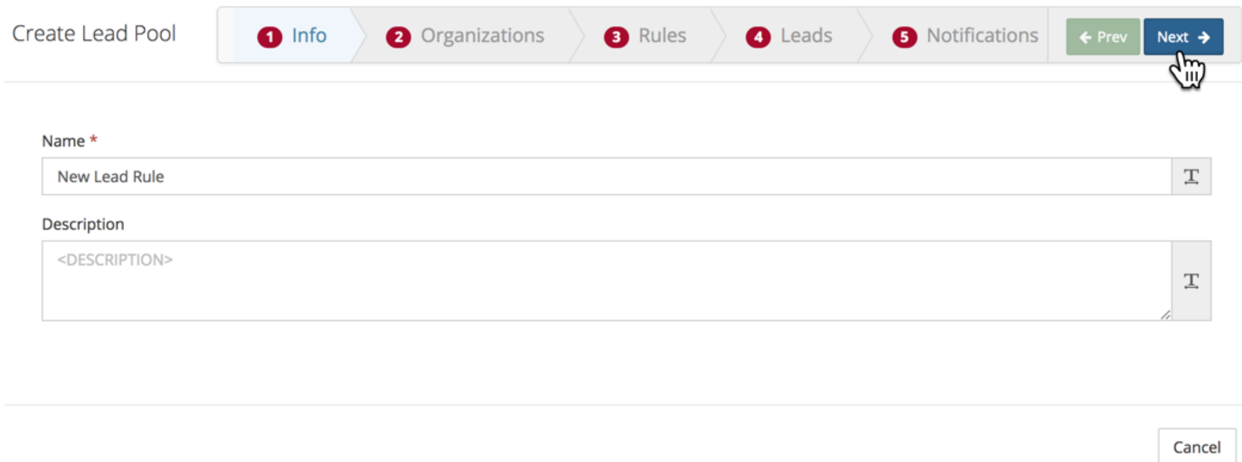


Click Go.

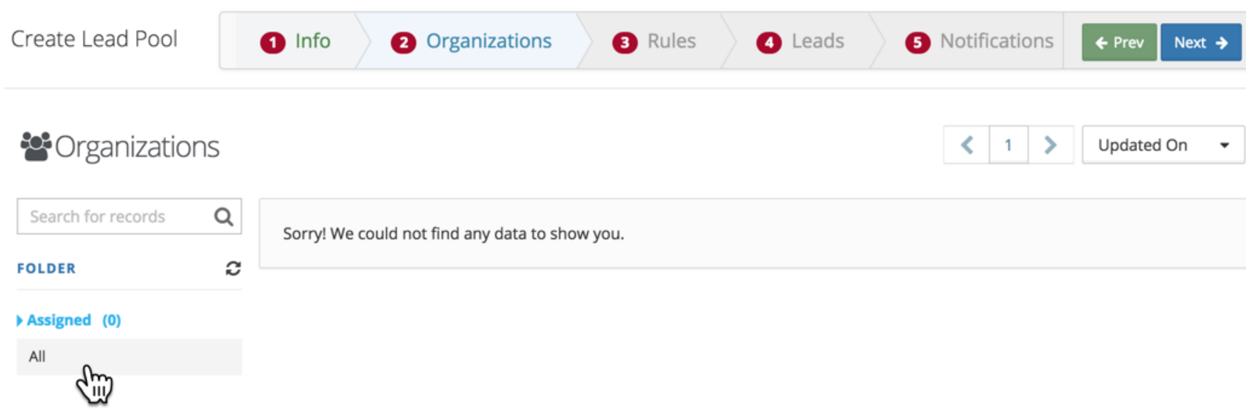
Creating a pool based on Organizations.

Select this option if you are going to route a lead on a round-robin basis to users within an organization. This is recommended if you have multiple sales users within an organization who may accept the lead.

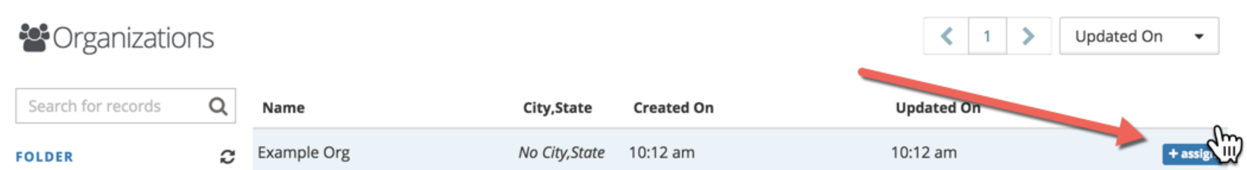
Enter a name/description for your rule and click Next.



Click All to view organizations you may assign.



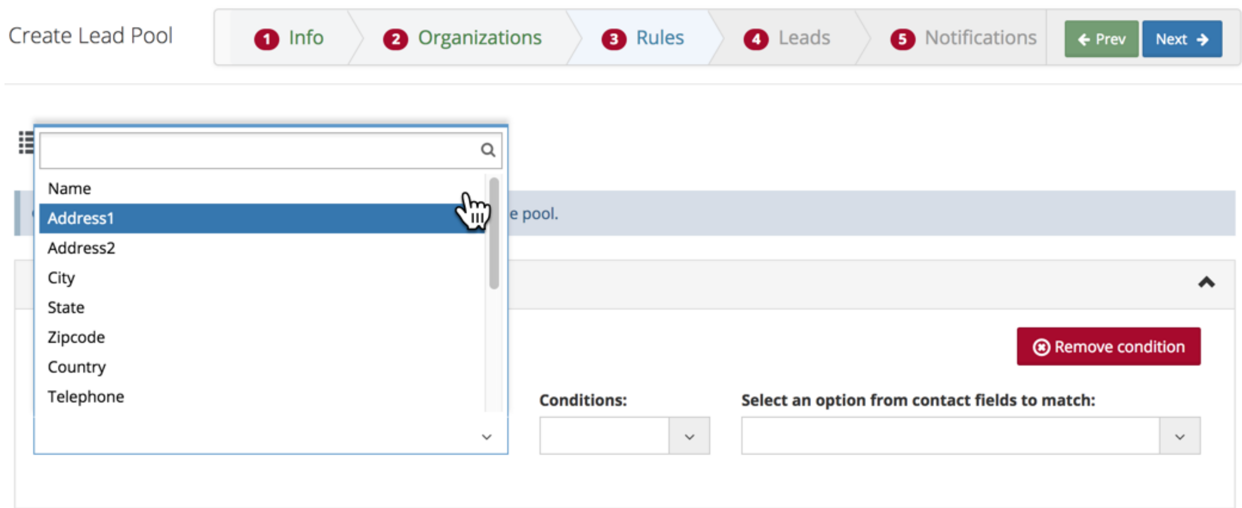
Click assign next to any org that should receive leads based on this rule.



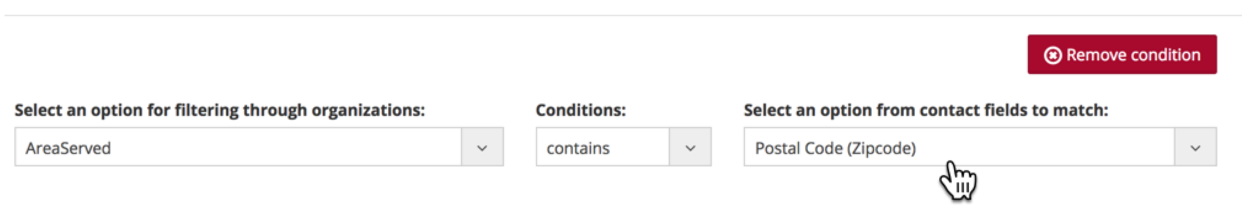
Click Next.

Create your routing rule conditions.

Multiple fields are available. You may choose to use the areas served field.



In this example, Areas Served is selected.



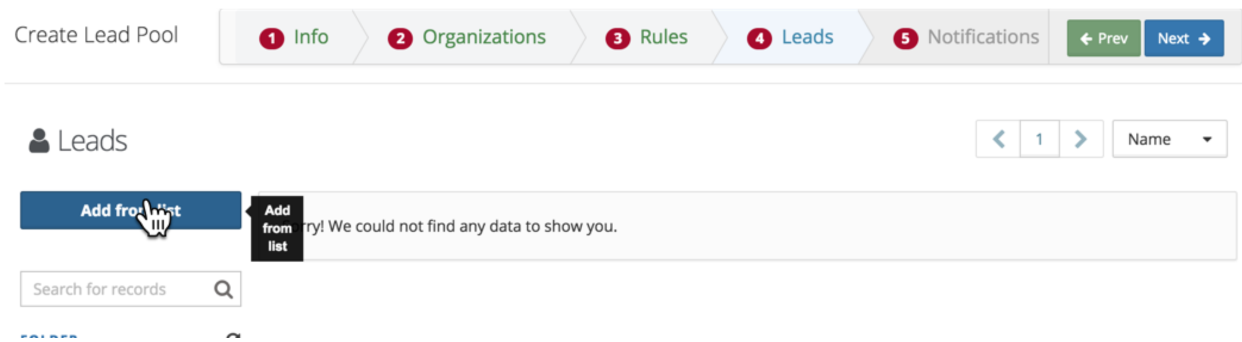
We are matching values in the Areas Served field to data in the lead's Postal Code (Zipcode) field.

In this way, if the Areas Served field contains the zip code 15033 and a lead has this zip code in their Zip code field, this lead would be routed to this organization of users.

You may create and combine multiple rules by adding more conditions. Less than 5 conditions is recommended for best results.

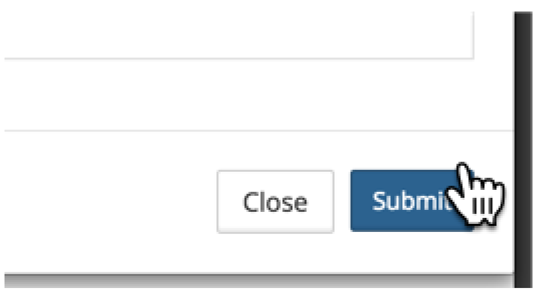
Click Next when you are finished with your rules.

Now, add your list of leads that will be routed. Click add from list.

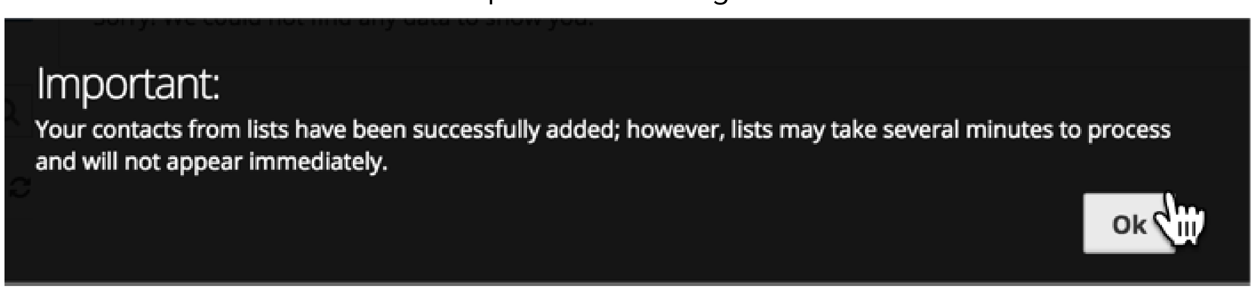


Select a list or multiple lists.

Click Submit.



Your contacts will be added to the pool in the background.

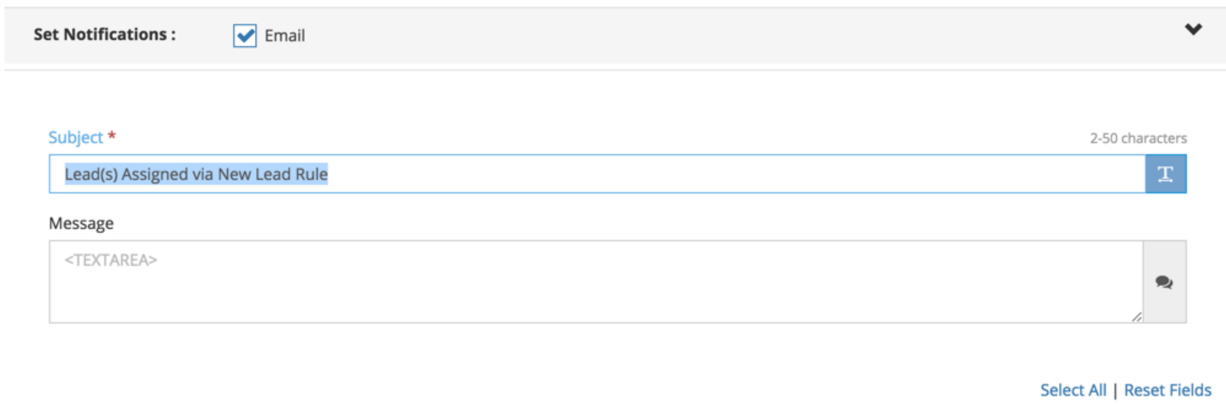


Click Next.

In this section, you can configure notifications for users.

Users will receive these in their Notifications section of the software or in their inbox if they have email enabled for their notifications.

Configure Subject line, custom message and fields you want users to see when they review the lead details in their email inbox/notification pane.



Click Finish.

Once your lead pool is created, you can see User/Orgs assigned to the pool, any assigned leads, unassigned leads.

Click the rule again to edit it/make changes.