Assigning Leads

There are a variety of ways to assign leads to users.

1. ## **Auto Assign Groups –** *Recommended for Web Provided Leads*

   Auto Assign Groups round robin leads to a pre-set group of users.

   a) *To set up an auto-assign group:*
      1) Administration > “Auto Assign Groups”
      2) Click “Add new record”
      3) Create a group name
      4) Click the check mark

   b) *To add users to a group:*
      1) Click on “No users added yet”
      2) Select the users you want to add
      3) Click the check mark to save

   c) *To assign groups to certain leads:*
      1) Administration > Web Lead Setup
      2) Click the cog icon  for the desired provider
      3) Use the down arrows to assign an Auto Assign Group to each type of lead.
      4) Save Settings

   d) *To upload a list and assign it to a group:*
      1) Check to see if the spreadsheet is in a CSV format. If it is not, open the spreadsheet in Excel and save it as a CSV.
      2) Administration > Import Leads
      3) Click "Select" to browse for your CSV file, then click "Upload."
      4) Map the fields from your spreadsheet into Lead Manager. The boxes stacked on the left are the column headers from your spreadsheet. The white boxes on the right are the fields in Lead Manager. To map the fields, click on the boxes to the left, and drag and drop them into the corresponding white boxes on the right within each tab.
      5) Select a Lead Source from the dropdown box.
      6) For the “Import Name” field, add a custom name that you would like the list to be called
      7) Assign the leads to a folder, if desired.
      8) Click “Import”. You will then see a confirmation page that your leads have been added and have the option to assign the leads to a group.
      9) Use the drop down to select the desired group.
      10) Click “Assign Leads.”

   e) *To set up a web form and assign it to a group:*
      1) Administration > Web Forms
      2) Add New Web Form
      3) Click the edit icon
      4) Change the form name

5) Select a Lead Source
6) Check the desired form fields
7) Use the drop down to select the desired Auto Assign Group
8) Click the check icon to save

2. Lead Distribution > Assign Leads – *Recommended for everything other than web leads*

Distributing leads via the Assign Leads function is a great step 2 for all leads that are not web provided like home office or regional lead lists. It's also recommended if you are new to the platform and want to distribute all existing leads to get your users started.

a) *To assign leads in bulk:*
   1) Administration > Lead Distribution
   2) Select the users that you would like the leads distributed to. Click "Assign Percentage"
   3) Give each user a percentage by typing it into the provided text box. If there is only one user selected, type 100%
   4) Make sure only unassigned leads are being distributed in the dropdown box to avoid reassigning existing leads
   5) Click "Assign Leads". The new assigned users will receive an email notification indicating they have new assigned leads

3. Lead Distribution > Assign Leads by Source - *Recommended when more granular distribution is needed*

Unassigned leads can be distributed in the Lead Distribution tab by source.

a) *To assign leads by source:*
   1) Administration > Lead Distribution
   2) Select Assign Leads by Source at the top of the page
   3) Select the source you would like to assign
   4) Select the users you would like to assign this lead source to
   5) Distribute the percentage of leads if you have selected more than one user. If you have only selected one user for this lead source, then assign 100% of the leads to them
   6) Click Assign Leads

4. Lead Distribution > Lead Redistribution (Basic) – *Recommended when a user leaves the office*

Leads can be redistributed in the Lead Distribution tab. The basic function takes all leads from one user and moves them to another user.

a) *To redistribute leads:*
   1) Administration > Lead Distribution
   2) Select Redistribute Leads by User (Basic)
   3) Select the user you would like to take leads from

4) Select which user will receive the leads
5) Click Reassign Leads

5. **Lead Distribution > Lead Redistribution (Advanced) –** *Recommended when you want to give some (but not all) of a user's leads to another user*

The advanced function allows you to redistribute neglected leads, new leads, abandoned leads or all leads from one user and moves them to another user or users.

a) *To redistribute leads:*
   1) Administration > Lead Distribution
   2) Select Redistribute Leads by User (Advanced)
   3) Select the user you would like to take leads from
   4) Select which of their leads to redistribute
   5) Select which user(s) will receive the leads
   6) Click Assign Percentages
   7) Allocate the percentage of leads
   8) Click Reassign Leads

6. **Assigning Leads by Staff ID –** *Recommended to automatically assign leads from MWI unsold quotes to the staff member who initiated the quote and lists with NTID information*

Leads can be automatically distributed to users based on their NTID. MWI unsold quotes are automatically loaded in to LM. Imported lists can also be distributed in this way.

a) *To set up NTIDs for users:*
   1) Administration > Manager Users
   2) Click edit icon
   3) In the NTID box, type the user's NTID
   4) Check the "Assign Leads Using NTID" box
b) *To upload a lead list:*
   1) Check to see if the spreadsheet is in a CSV format. If it is not, open the spreadsheet in Excel and save it as a CSV.
   2) <u>Be sure you have an NTID column.</u>
   3) In Lead Manager, navigate to Administration > Import Leads.
   4) Click "Select" to browse for your CSV file, then click "Upload."
   5) Map the fields from your spreadsheet into Lead Manager. The boxes stacked on the left are the column headers from your spreadsheet. The white boxes on the right are the fields in Lead Manager. To map the fields, click on the boxes to the left, and drag and drop them into the corresponding white boxes on the right within each tab.
   6) <u>Be sure to map the NTID column to the NTID box.</u>
   7) Select a Lead Source from the dropdown box.

8) For the “Import Name” field, add a custom name that you would like the list to be called
9) Assign the leads to a folder, if desired.
10) Click “Import”. You will then see a confirmation page that your leads have been added and they will be assigned to the designated users.

7. Leads in a custom list – *Only recommended when none of the other distribution techniques are specific enough*

If you would like to assign a group of leads based on a filter instead of all at once (for example, you would like to assign a group of leads based on city or zip code), you can also assign leads from the Lead List. This method can be used for any type of leads.

a) *To use this method:*
   1) Navigate to Leads > Leads- All > All and use the down arrow beside each column header to filter to only the leads you would like to reassign.
   2) Click the top checkbox on the left of the list to select all contacts on the page.
   3) A pop-up will appear on the top of the list with the option to select all the leads in the list. Click Select if desired.
   4) Once you’ve selected at least one lead, above the list “Select Action” will be visible.
   5) Select Assign To. Choose the user you would like to assign contacts to in the dropdown.