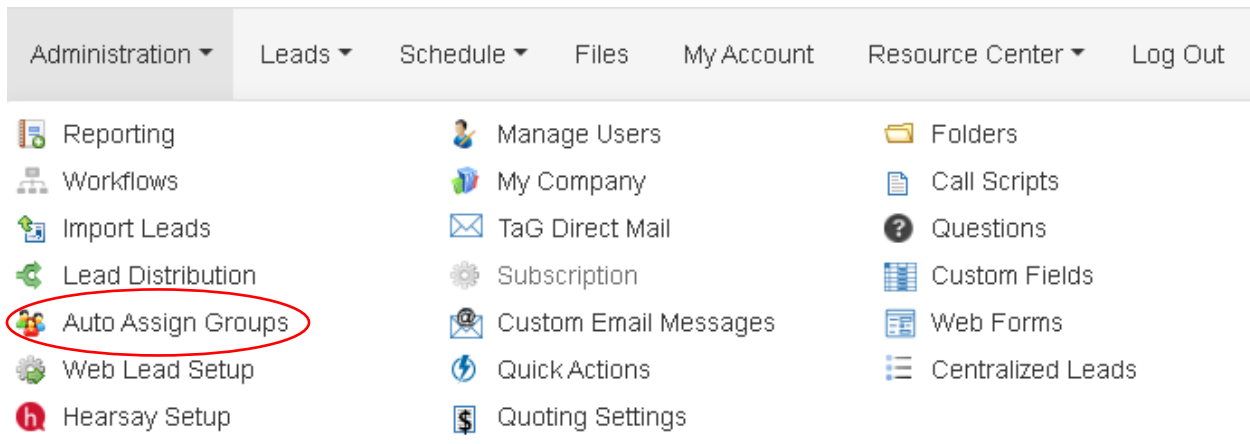


LEAD MANAGER: CREATING AUTO ASSIGN GROUPS

Details: This job aid will show you how to add users to Auto Assign Groups so leads can be automatically assigned to your desired users. Please note, a group can contain one or more individuals and the same individual can be a member of multiple Auto Assign Groups.

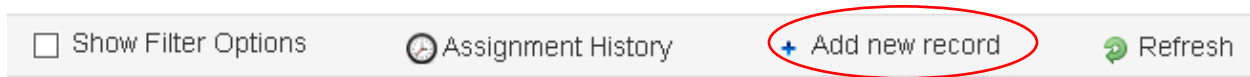
Step 1:

Go to the Administration Tab and select **Auto Assign Groups**.



Step 2:

To create a new Auto Assign Group, select **Add New Record**.



Step 3:


Enter the name of the Auto Assign Group you are creating and then hit the checkmark icon.



A screenshot of a form titled 'Assign Group Name'. It features a text input field and a button with a checkmark icon (circled in red) and an 'X' icon.

Step 4:

Click on the hyperlink **(No Users Included Yet)**.

Internet Leads	 (No Users Included Yet)
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Step 5:

Check the box beside the user(s) you want to add to this group and select **Save Users** in the right-hand corner once completed. You can now select the Auto Assign Group to receive leads.

Receive Leads	Name
<input type="checkbox"/>	Adrian Vatkin
<input type="checkbox"/>	Alan Wiley
<input type="checkbox"/>	Alex Brennan