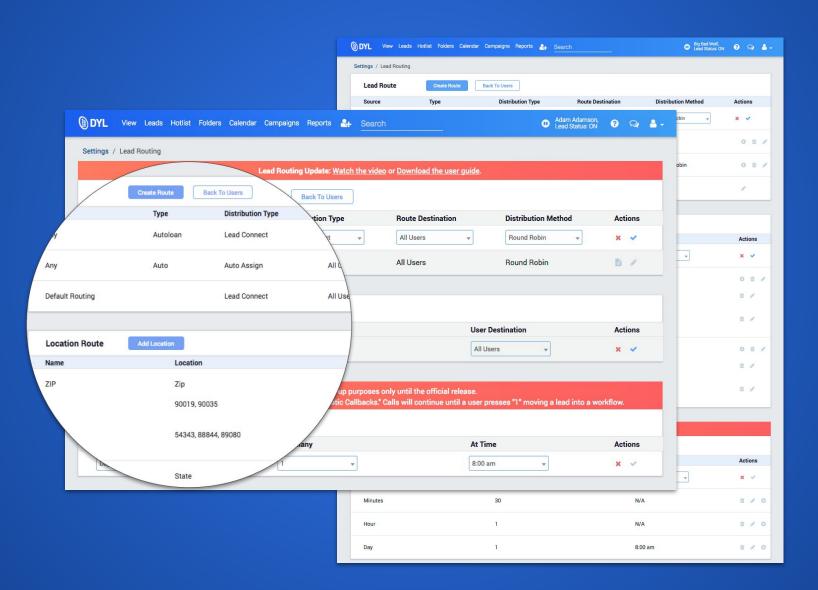
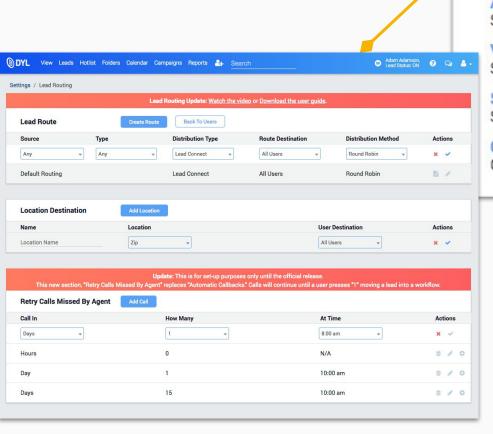
DYL's Lead Routing

New Features | V2. 2.8.16



New Customizable Settings: Lead Dialing > Lead Routing



Lead Dialing

Schedule

Configure when your leads should be dialed.

Lead Routing

Configure how real time leads are assigned and called.

Automatic Callbacks

Schedule automatic follow-up attempts.

Voicemail Drop Setup

Setup your outbound voicemail messages.

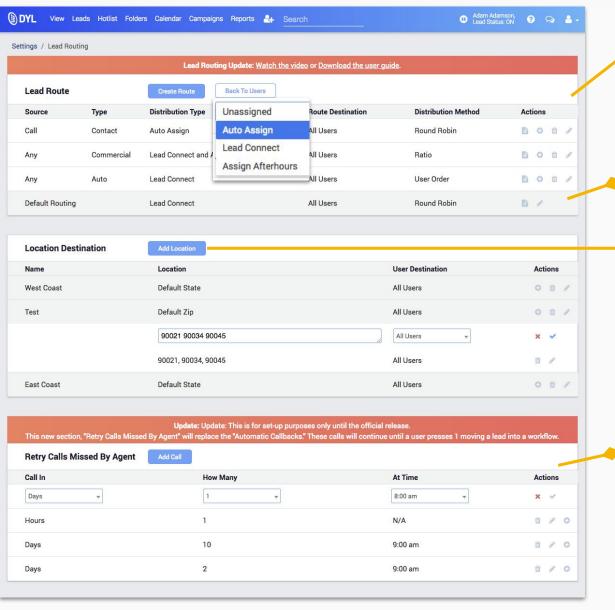
State Caller IDs

Set the Caller ID for dialing certain states.

Contact Forms

Create HTML forms for your websites.

Lead Routing Overview



Customize Lead Routing based on Source, Type, Assignment and Destination

Default Route (If you don't set-up a custom lead route, leads will continue to route by the default settings).

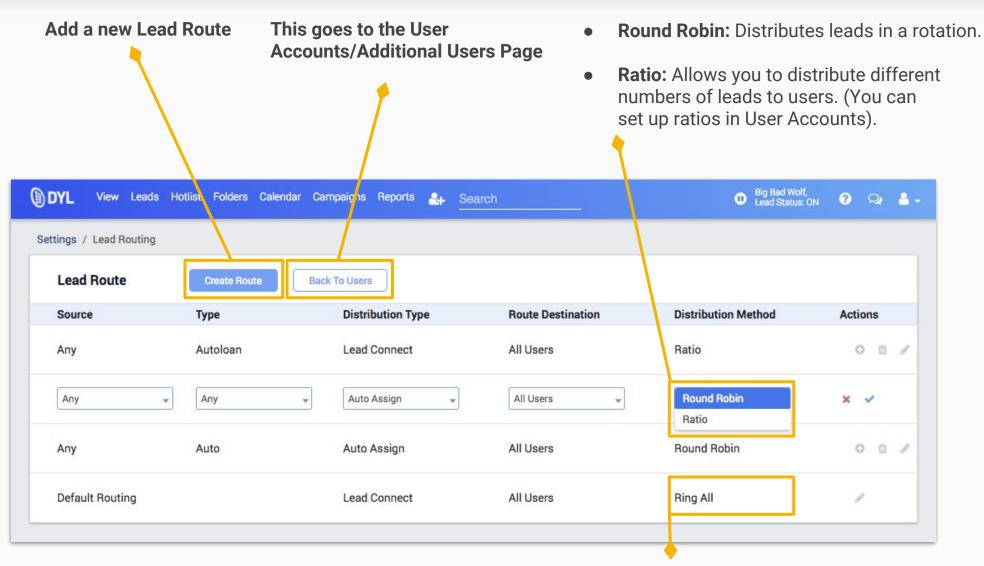
 Create Routing Destinations based on specific Zip Codes and/or States

"Retry Calls Missed By Agent" - *Lead Connect Only* Will be replacing the "Retry Calls Missed By Agent" on your Automatic Call-Backs page.

When a lead is distributed through Lead Connect and is missed by your producers, you can use retries to automatically call your producers back in intervals you desire.

It's important to utilize these retries as Lead Connect auto-assigns the lead and will start the personalized workflow for the producer who presses 1 to dial out.

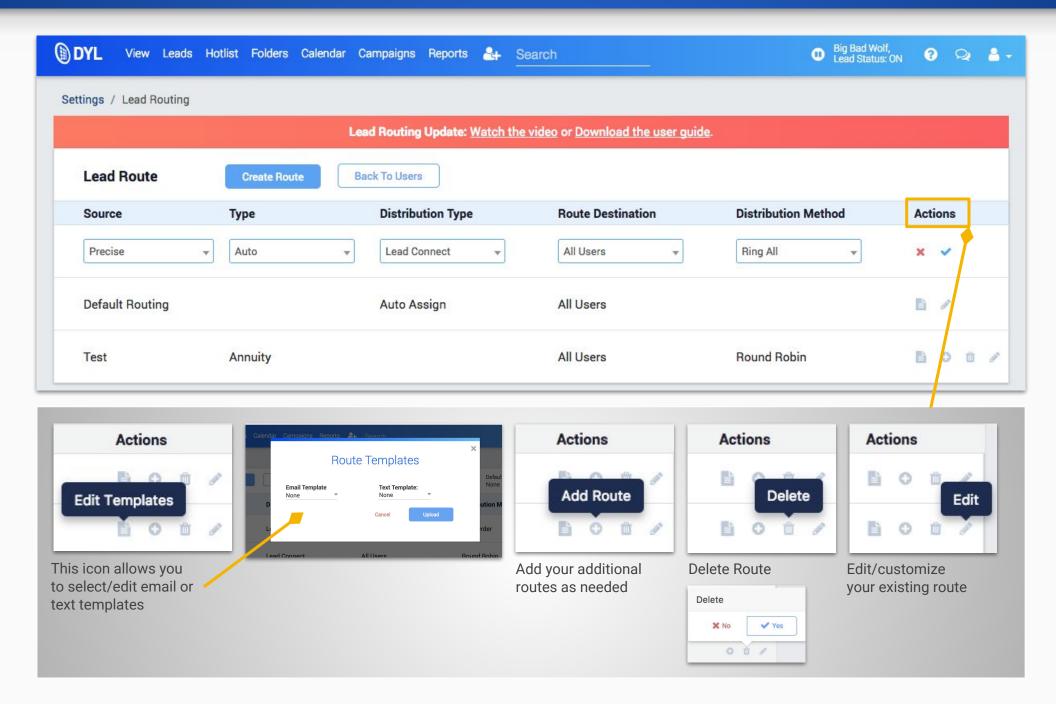
Lead Route Overview



• **Ring All:** Rings everyone in the group that has an extension.

Lead Route: Settings

Customize your Lead Routes to any Source, Type, and Department



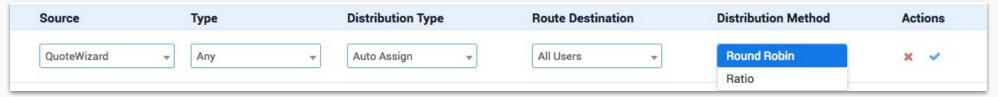
Distribution Types:

Sends leads to the correct person or group

Type 1: "Unassigned" means there will be no instant call and the lead will come in unassigned.

Source		Туре		Distribution Type	Route Destination	Distribution Method	Actions
QuoteWizard	*	Any	¥	Unassigned 🔻	N/A	N/A	× ×

Type 2: "Auto Assign" will automatically assign to users within the Route Destination as soon as the lead comes into DYL. This option only allows Distribution Methods of Round Robin and Ratio.



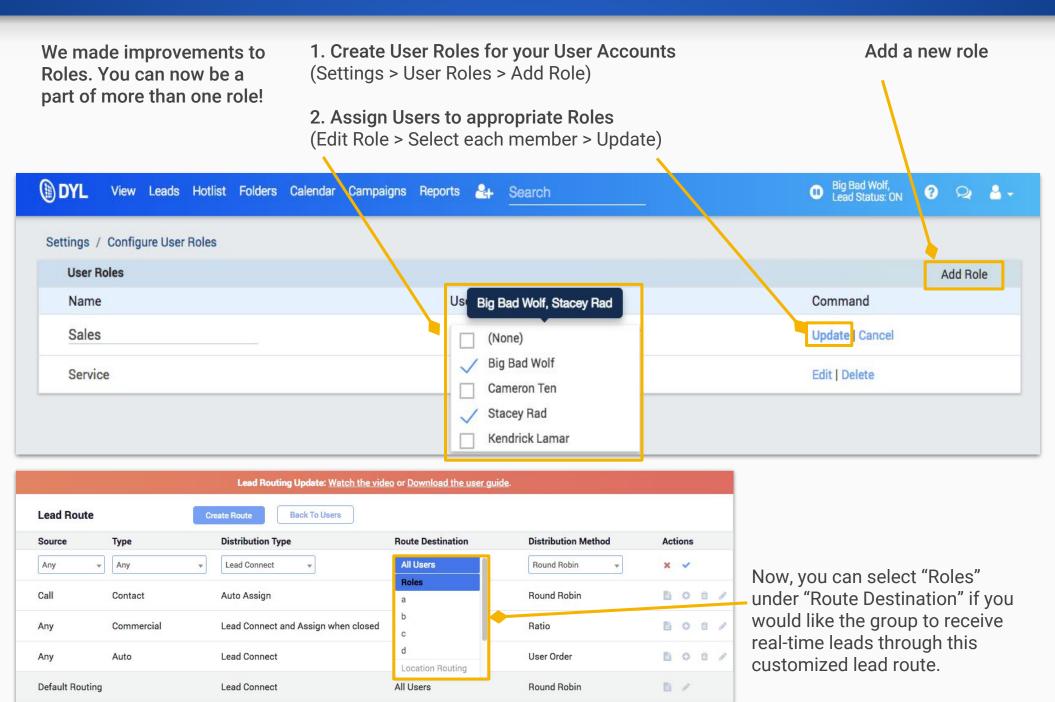
Type 3: "Lead Connect" is open during business hours. This will ring users in a rotation, based who last answered the instant call (this may go out of order when users are paused).



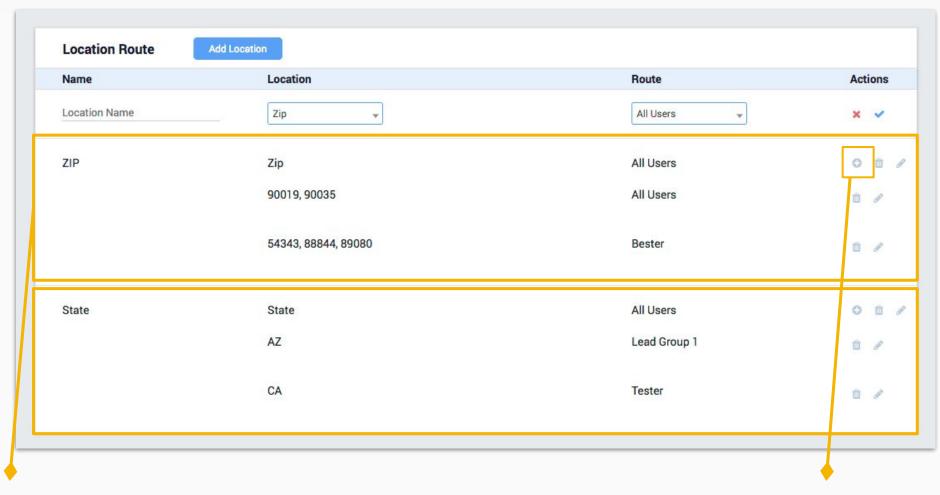
Type 4: "Assign After Hours" will assign these leads when the office is closed, and act as Lead Connect when the office is open, (See Settings > Schedule for office hours).

Source	Туре	Distribution Type	Route Destination	Distribution Method	Actions
QuoteWizard	▼ Any	▼ Assign Afterhours ▼	All Users ▼	Ring All ▼	× 🗸

Additional Lead Distribution Setup User Roles



Location Route

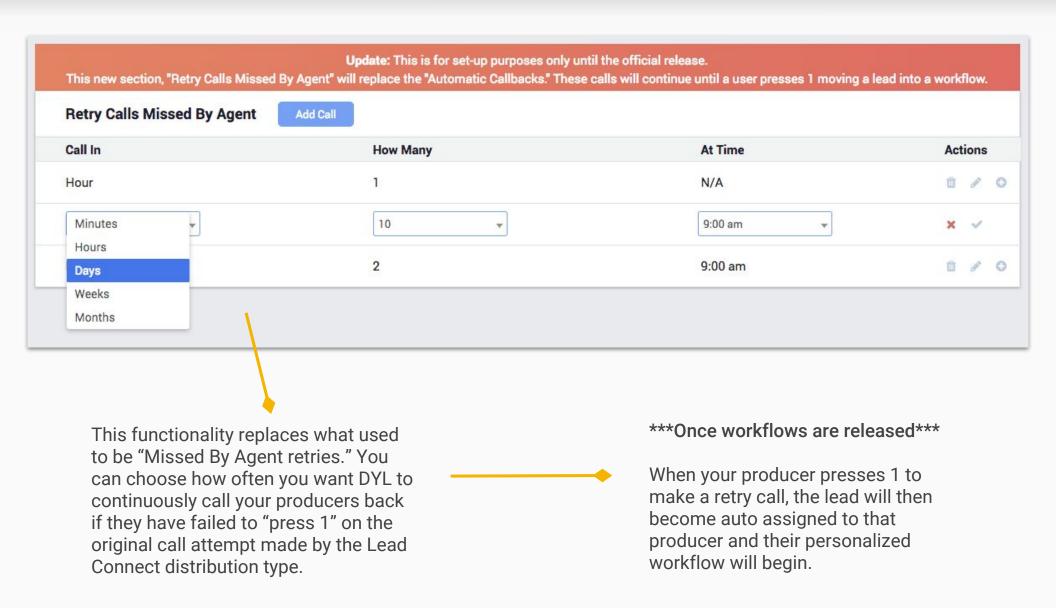


Add multiple zip codes by space separation or a comma

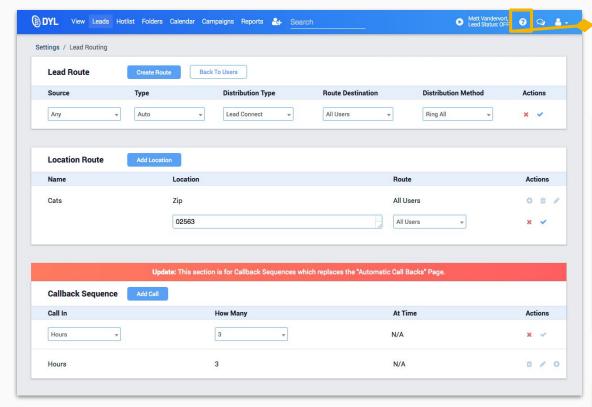
Add to Zips/States

Lead Connect - Retry Calls Missed By Agent

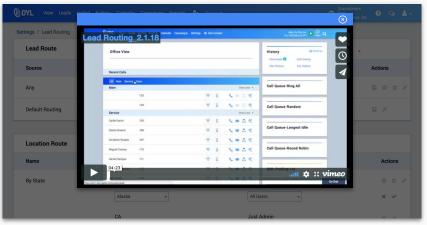
Customize the timing and frequency of re-dialing your producers if they haven't pressed 1



Lead Routing Help Resources



- 1. Videos
- 2. DYL's New Features User's Guide



DYL's Lead Routing - New Features Guide V1

