LEAD ASSIGN USER MANUAL

Revised: Wednesday, January 31, 2018

If you have questions please email us at: info@leadassign.com
or call 1 877 230 8184

View support articles, submit tickets, and contact us here:
https://leadassign.com/support/

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INTRODUCTION

Lead Assign was devised to reduce the time and friction involved with routing your incoming leads. You have leads, and you have a team of agents. Lead Assign helps you get the right lead to the right agent, instantly.

Follow this guide to get up and running and take control of your incoming leads today.

TO GET UP AND RUNNING AS QUICK AS POSSIBLE FOLLOW THESE SIMPLE STEPS:

1. Add a few tags
2. Add some agents
3. Point your incoming leads to your unique account email address
   (found on the company settings screen... e.g. yourcompanyname@md.leadassign.com)

That's really it!

If you have questions please email us at: info@leadassign.com or call 1 877 230 8184

If you want to delve deeper into all the options that Lead Assign offers read on...

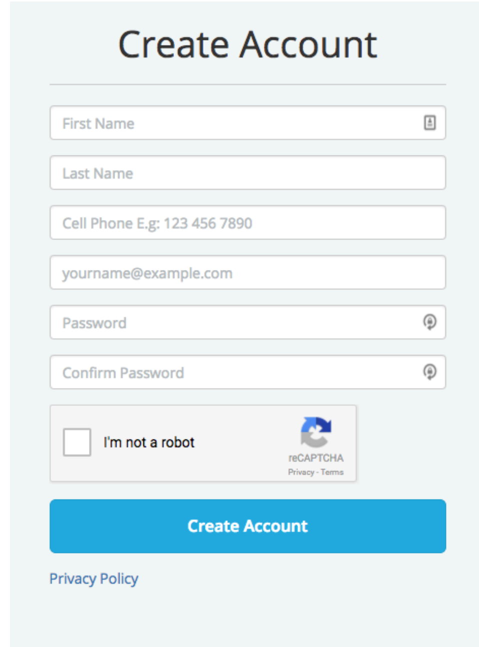
CREATE AN ACCOUNT

https://app.leadassign.com/signup

ENTER USER DETAILS

You will be the administrator of the account.
You can give someone else administrator access later.

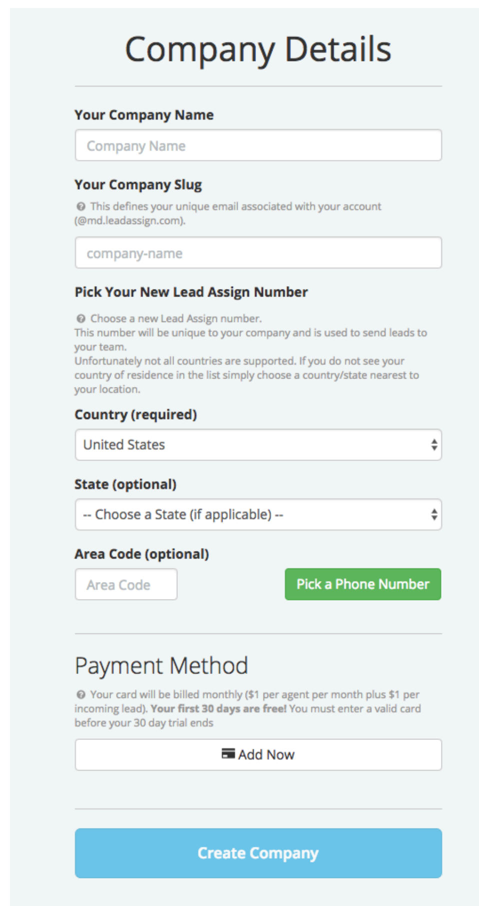
- Fill out all fields on this page and hit “Create Account”



ENTER COMPANY DETAILS

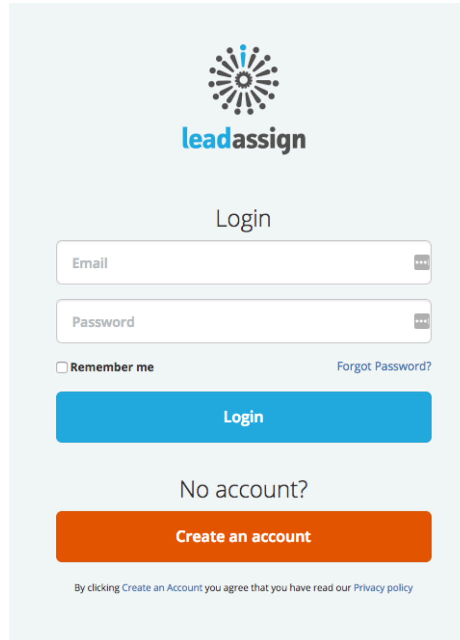
Enter your company information. This information will be visible to your agents. As a Lead Assign user you can have multiple companies.

- **Enter your company name.**
- **Edit your company slug** (Optional).
  You only need to do this if you require a different URL on the account than your company name (no spaces).
- **Select your country of operation**
- **Pick a number**
  Each Lead Assign account has it’s own unique telephone number that is used to send out leads via SMS. This number will be unique to your company but cannot be an existing number.
    - You can try choosing and area code, and then select “Pick a Phone Number”, however certain area codes do not have available numbers. If you come across this simply remove the area code and hit “Pick a Phone Number”.
    - Try to choose a number that is within your region.
- **Add a payment method**
  You will have 30 days free. To avoid unnecessary interruptions, enter your credit card details.
    - You will not be billed for 30 days
    - Your credit card details are securely transmitted for billing purposes and we do not store them.
- **Hit “Create Company”**



LOGGING IN

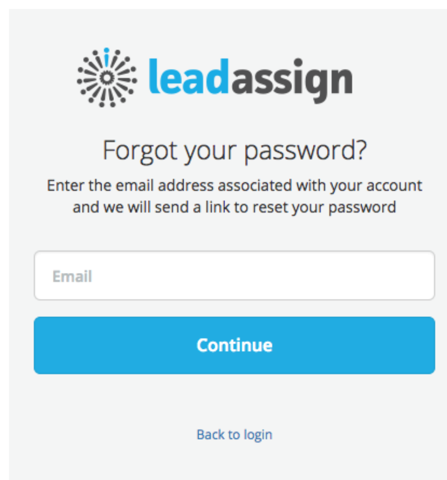
https://app.leadassign.com/login



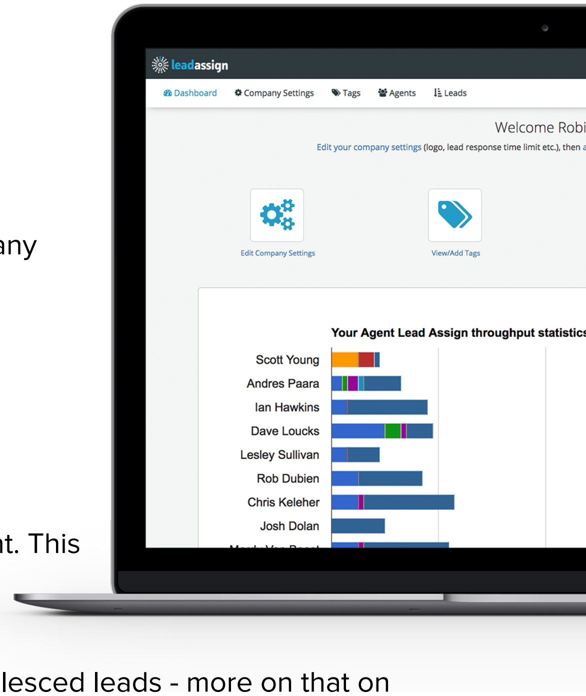
- Enter your email and password
- Hit “Login”

RESET OR FORGOTTEN PASSWORD

If you have forgotten your password, or you need to reset a password click on “Forgot Password” or visit: https://app.leadassign.com/password/remind



DASHBOARD



The dashboard gives you an overview of how your agents are performing. Hover over the bars to see details.

If this is your first time seeing this screen you probably don't have any agents entered yet. More on that later.

Lead Throughput Graph

- **Accepted**
  Represents leads accepted by this agent
- **Auto-Accepted**
  In some instances leads are automatically accepted by an agent. This can happen if the administrator has enabled "Disable multiple agent queueing" on the advanced company settings screen, or if a new lead was deemed to be from the same source as a lead that was recently accepted by an agent. We call these coalesced leads - more on that on the Lead Dashboard screen.
- **Catchall-Accepted**
  The catch all accepted the lead after it was not accepted by any of the agents.
- **Declined**
  Represents leads declined by this agent. It is not always a bad thing for agents to decline a lead. It speeds up delivery of the lead to an agent that may be better suited. However, if you notice lots of declined leads you may want to revisit your tag assignments
- **Requeued**
  The lead flowed through the agents but was not picked up and ended up with the catchall. The catchall did nothing and the agent requested second chance at the lead.
- **Requeued-Accepted**
  The lead was accepted by an agent after selecting a second chance
- **Requeued-Declined**
  The lead was declined by an agent after selecting a second chance
- **Requeued-Timedout**
  The lead was missed by an agent after selecting a second chance
- **Requeued-Pending**
  The lead has been sent to an agent after selecting a second chance
- **Catchall**
  The catchall has been sent the lead
- **Pending**
  The agent has been sent the lead but has taken no action yet
- **Timedout**
  The agent missed this lead

COMPANY SETTINGS

QUICK START SETTING

Lead Assign has been designed to intelligently SMS and Email leads to your agents, one at a time, sequentially, based on keywords and tags. If you wish to use the out of the box settings simply follow these steps before moving onto the tag manager:

- Upload a logo (shown to your agents when receiving leads)
- Set lead expiry time (amount of time each agent has to accept the lead - we recommend 5 minutes for good reason but feel free to change)
- Set follow up request time (the amount of time in minutes before we send the agent that accepted the lead a request for lead interaction information. Set this to zero to disable follow up)

ADVANCED SETUP

Spam

- **White List**
  If the lead matches a whitelist rule, it is parsed and dispatched to an agent.
- **Black list**
  If the lead matches a blacklist rule, it is rejected.
- **Spam Score**
  If the spam score of a lead (sent via email) exceeds the spam score limit then it is rejected. The effective range is 0.0 to 20.0.
    - 1.0 Very strict, only people will have a score lower than 1
    - 3.0 - Most regular people will be allowed though and most web form submissions
    - 5.0 - Most services (web form submissions) will be allowed though
    - 7.0 - This will allow leads though and filter out most of the blatant spam (default)
    - 20.0 - Max spam score leads should have
    - 1000.0 - No spam filtering, allow all emails though (set super high to ensure that)

- **Forwarding**
  In the event that you receive normal communication emails mixed in with your lead emails you can set a forwarding rule to divert it from your lead funnel.

  How Forwarding works...
    - Enter the address you would like to Forward email to in the Enter Forwarding Address box.
    - Enter the subject you would like to filter on in the search in subject box.
    - Any email received that contains the subject will be sent to the Forwarding address
    - Forwarding does not affect lead routing and is not affected by blacklisting or whitelisting
    - Forwarding is limited to three rules per company

Translations

The translations section not only allows you to specify languages, but gives you the power to change the terms you could like to use. For example, rather than calling a lead "A New Lead" you can change it to "A New Potential Client" etc.

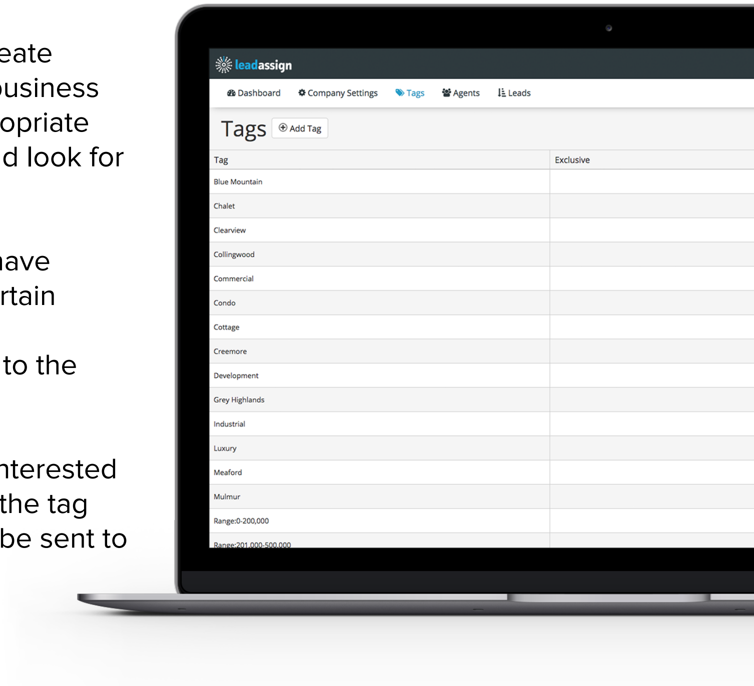
Select the communication touch point you would like to edit and enter your new terms:

- **New Lead Email**
  The first email that is sent to the agent when the qualify for a lead
- **Accepted lead Email**
  The email that is sent to the agent when they accept a lead
- **Catchall Email**
  The email that is sent to the catchall when they receive a lead
- **Follow Up Catchall Email**
  The follow up request email that is sent to the catchall after accepting a lead
- **New Lead SMS**
  The first SMS that is sent to the agent when the qualify for a lead
- **Accepted Lead SMS**
  The SMS that is sent to the agent when they accept a lead
- **Catchall SMS**
  The SMS that is sent to the catchall when they receive a lead
- **Countdown**
  The lead preview screen (webpage) with the countdown clock
- **Accepted Lead**
  The lead detail screen (webpage) after hitting "Accept Lead"
- **Time-out Lead**
  The webpage that is seen if an agent clicks on a lead after their time limit has expired
- **Declined Lead**
  The webpage that is seen if an agent clicks on decline a lead
- **Requeued Lead**
  The webpage that is seen if an agent clicks on "give me another chance"
- **Follow Up Form**
  The webpage that is seen after an agent clicks on "provide feedback" from the request feedback email

Advanced Settings

- **Agents names as tags toggle**
  When parsing leads, look for agent names in the lead
- **Every agent qualifies for untagged leads**
  If you have assigned users a pecking order (PK_xxx tags) then leads will always score based on that. Otherwise if the lead has no tags everyone will be given an equal chance
- **Custom terms and conditions**
  This displays your custom terms and conditions on the view lead screen prior to lead acceptance.
- **Disable agent queue**
  Disabling multiple agent queuing will send the incoming lead to the agent or office that best matches the lead only. The timer will be disabled and the lead will be considered automatically accepted.

TAG MANAGER



Tags are an extremely powerful and flexible way to create routing rules. Define tags that are applicable to your business and routing needs, then assign those tags to the appropriate agents. Lead assign will parse your incoming leads and look for these tags and then route accordingly.

For example, if you are a real estate broker you may have certain agents that sell commercial properties, and certain agents that sell residential. You would make two tags; "Commercial" and "Residential". Then assign the tags to the appropriate agents.

When a lead comes in with the text "Johnny Smith is interested in the following residential property: 123 main street", the tag "Residential" would be picked up and the lead would be sent to your residential agents.

FREE FORM KEYWORDS

Free form tags can be any text string. Examples include names, regions, product codes, postal/ zip codes etc.

How to add a tag

- **Hit "Add Tag"**
  Enter the free form text you wish to use and hit "Update"

- **Exclusive**
  Use the "Exclusive" option if you have agents that work exclusively on certain topics. If the parser picks up on an exclusive tag in a lead it will only be offered to agents with that tag and will exclude agents that qualify on other tags that it may pick up in the lead

- **"Toggle Advanced Mode"**
  Toggling advance mode gives you the ability to change the weighting, or importance, of a tag. By default, all tags are score 50. If you route your leads mostly by region but have some other rules in the system you may want to make all region type tags 100
    - Weighting can be used in conjunction with "Exclusive" tags

CUSTOM TAGS

There are some instances where a free form tag just doesn't cut it. For these scenarios we have created some custom tag structures. These scenarios can include things like price range where you can use a custom tag to determine an agent that is appropriate for properties that fall between a certain price range.

List of Custom Tags:

- **Pecking Order**
  We allow you to increase or decrease an agents pecking order by adding a “PK” tag. This updates allows you to configure leads to flow to your agents by pecking order first rather than by keyword.

  How to set pecking order
  To set a pecking order simply add the tag PK_# (where “#” is a number associated with each agent). We suggest adding PK tags in increments of 100. The higher the number, the closer to first refusal the agent will be

  For example:
    - John: PK_100
    - Bob: PK_200
    - Phil: PK_300

    When a lead comes in it will go to Phil. If he refuses or does not accept in time it will be offered to Bob, then John.

    You can also use negative numbers to down rank agents.

    You can use PK tags in addition to regular tags and give two or more agents the same PK score. In this scenario the lead will flow through a regular pecking order and when it encounters two agents with the same PK score it will look to match based on keywords.

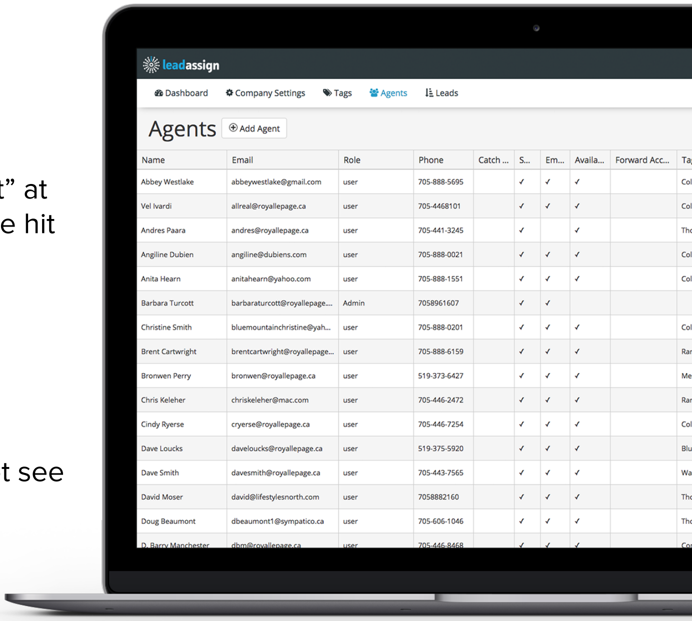
- **Price Range**
  Agents can be responsible for certain price ranges. For instance, houses in the $200,000 – $500,000 range.
  To use the price range tag format a tag like this:
    - Range:$200,000-$500,000 ($, €, £, ¥ currency symbols are supported)
    - Range:200000-500000 is also supported and makes other currencies easier to handle.
    - Add a price range tag in this format only: (i.e. include the word ‘Range:’ at the start)

- **Zip Range**
  We support Zip ranges, for example: Zip:90200-90299
  Which will match zip codes between 90200 and 90299 (inclusive).

If you believe you have scenario that we have not covered here and wish to have a custom tag created please contact us.

AGENT ROSTER

ADD AN AGENT



Adding your sales agents is easy. Simply select “Add agent” at the top of the page and fill out all the fields. When complete hit “Update” to save, or “Cancel” to revert.

- **Name** (full name)
- **Email address** where they would like to receive leads
- **Role**
    - User - agents
    - Editor - has access to the application but cannot see billing
    - Admin - full access
- **Phone**
  This should be a cell phone capable of receiving text messages
- **Catchall**
  Agents with the catchall property will receive leads like normal, but will also receive leads which are rejected or timedout by all applicable agents.
  Agents with this property checked should be responsible for handling 'catchall' leads themselves or distributing the lead to an appropriate agent - In most cases only one person should be the catchall so as to avoid multiple people following up on leads which have not been accepted by the regular leadassign distribution chain
- **SMS**
  This determines if the agent would like to receive leads via SMS. This can be used in conjunction with Email
- **Email**
  This determines if the agent would like to receive leads via Email. This can be used in conjunction with SMS
- **Available**
  If an Agent is away for an extended period of time, uncheck the 'Available' property on that agent and they will not be included when the system is determining which agents to send leads to
- **Forward Accepted**
  The Agent will be emailed the lead when they accept, if they want it to also be emailed to additional address (eg. CRM systems) add the emails here, separated by commas
- **Tags**
  Select tags that were entered via the Tag Manager screen here. Simply select from the dropdown or start typing to filter the list of available tags.
- **Test SMS**
  An agent will be sent a test lead, this includes an sms and email. The test leads are for demo purposes only and do not actually timeout etc. (eg. if the agent re-clicks the link after timing out, it will still appear to work for them. This should only be done to confirm agents contact details are correct.

EDIT AN AGENT

- Hit “Edit”
- Make any changes
- Hit “Update” to save, or “Cancel” to revert

BULK UPLOAD AGENTS VIA CSV

Use our CSV template to create a list that you can use to import agents in bulk.
https://app.leadassign.com/files/leadassign-import.csv

The CSV is treated as the absolute correct source. If you have agents already in the system and in the CSV file, the following will happen:

- The existing user will be updated to match the CSV file
- A user present in the system will NOT be deleted if they are not present in the CSV
- Any tags present in the CSV will be added to your company
- Tags will not be removed from your company (but will be removed from users [if required] if they are being updated)

USER ROLES

Admin
Admins can perform all functions within their account.

Editor
Editors can do everything that administrators can do except change billing settings.

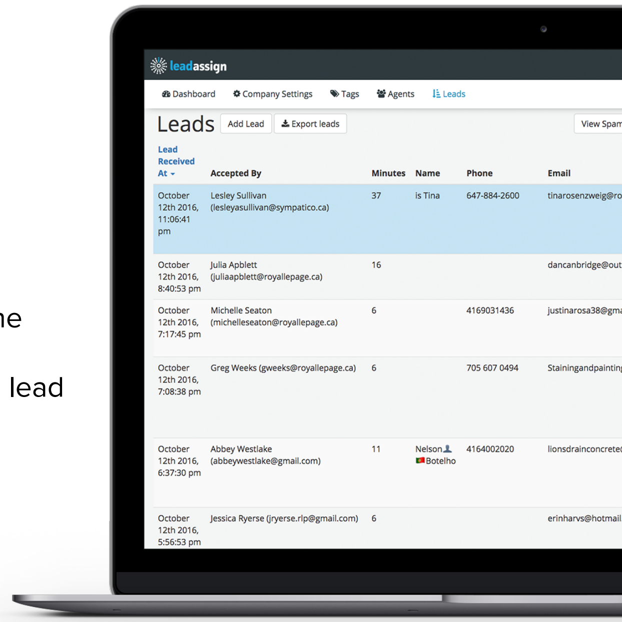
User
Typically a sales agent. This user role does not log into the system.

Catch All
Catch All is a setting within each user role that defines the person as someone who should receive leads when all applicable agents have either missed, or declined an incoming lead.

This user setting ensures leads do not fall through the cracks.

If an account has no Catch All then the leads are sent to Admins.

LEAD DASHBOARD



The lead dashboard gives you an overview of all leads that flow through the system.

You can:

- Easily export leads based on date range
- View a detailed account of the lead history including:
    - The lead contact details and initial enquiry
    - Routing history (who was given a chance to accept the lead)
    - Comments submitted by the agent that accepted the lead

ADD A LEAD

To add a lead you can hit “Add lead” and fill out the form. This will manually add a lead into your account.

To forward leads from one of your lead sources into your account point them to your **email endpoint** outlined on your company settings page.

EXPORTING LEADS

Hit “Export Leads”
In the pop up, select the date range you wish to export and hit “Download”

SPAM/REJECTED LEADS

These leads have not been sent to agents. If you find yourself regularly restoring leads from the quarantine, you may need to adjust your company spam/filtering settings

LEAD DETAILS

- **Lead received at**
  Outlines the date and time the lead was received by the system.
- **Lead received by**
  The name and email address of the agent that accepted the lead (will be blank on leads actively following through the system)
- **Minutes**
  Total amount of minutes between the system receiving the lead, and on of the agents accepting the lead
- **Phone**
  Phone number of the lead
- **Email**
  Email address of the lead

GOING LIVE

POINTING YOUR LEAD SOURCES AT YOUR ACCOUNT

Once you have all your agents in the system, and have added tags and assigned them to your agents, you are ready to start flowing leads through your account.

Simply navigate to the “Company Settings” screen and find your unique Email Endpoint email address. **Send all incoming leads to this address.**

FORMATTING INCOMING LEADS

Lead Assign has been designed to do a great job at parsing any type of incoming lead. However if you have control over the format of the initial lead submission there are a few things you can do to ensure your leads are parsed and routed correctly.

The system specifically looks for items following these labels:

Name:
Phone:
Email:
ZIP:

That said, Lead Assign can take leads that are not in this format and still be able to determine the name, phone and email of the customer interested in your services.

Please note that for many lead sources you will not have the opportunity to create leads that in the neat and tidy format similar to that shown above. This is fine and will often work well, as Lead Assign can read leads that are non formatted chat transcripts, verbose leads from 3rd party lead generators and lots more. Its our job to read your leads as they come in and pick the correct agents to get those leads - leave it to us!

That’s it!

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