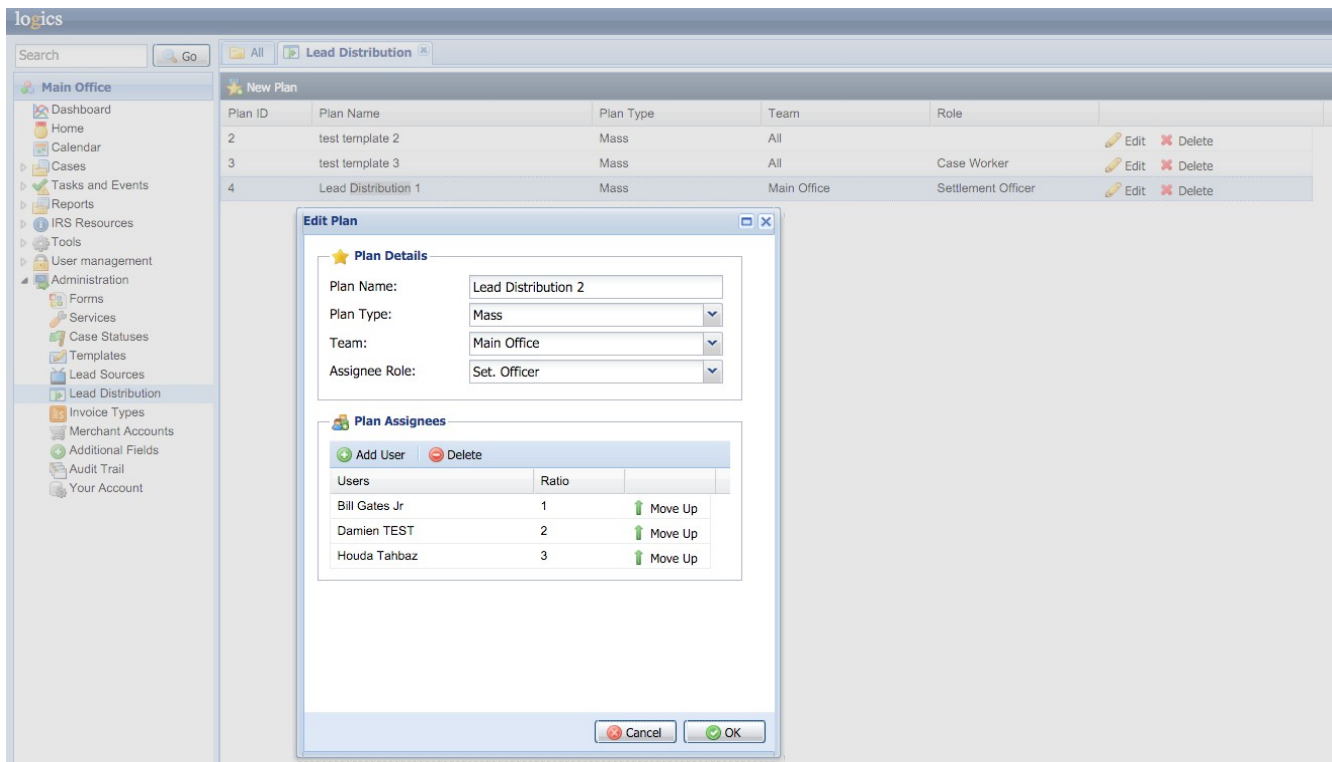Logics

Lead Distribution Instructions
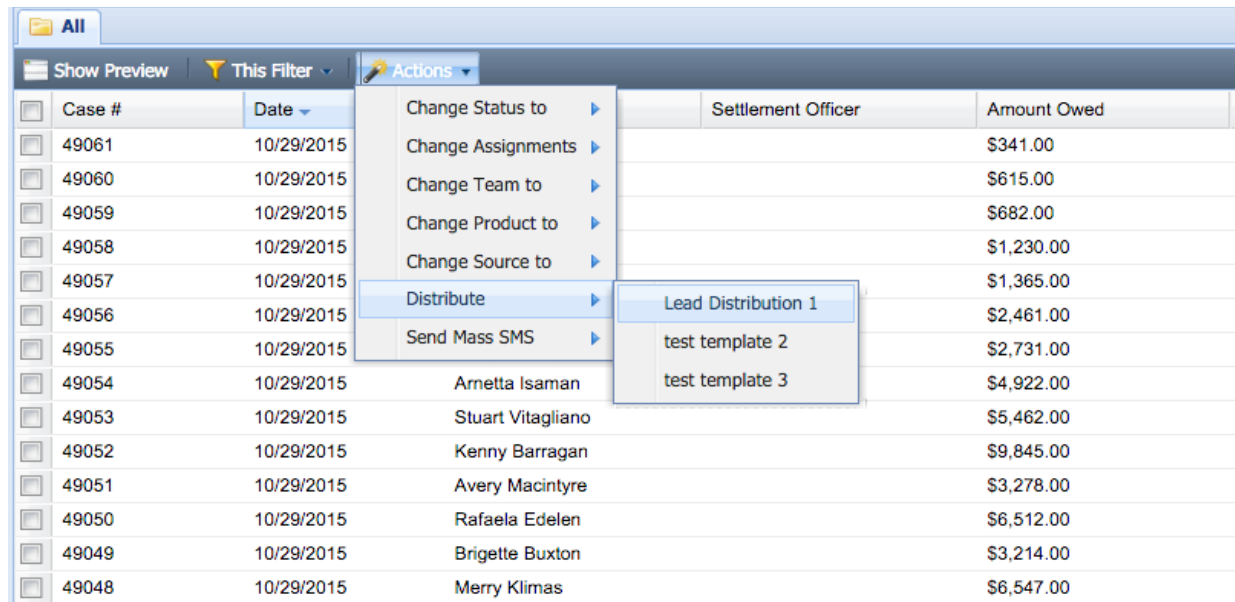
Design Your Distribution Plan

- Under Administration/Lead Distribution click on New Plan.
- In Edit Plan, specify a name for you plan and then select plan type, team, and assignee role for which you want to use the plan.
- Click on Add User button and select one user from the list, from the assignee role you selected above.
- Select a Ratio for each user. The ratio determines how many leads goes to each selected user in each cycle (See the below example).
- You can use the move up button to change the order of users in your plan.
- Click OK to save your plan.
- You will see a list of your existing plans in Lead Distribution page.
- You can Edit or Delete any of your plans at any time.

Logics

Put Your Distribution Plan into Action

- Go to a filter where you can find all your unassigned leads.
- Select the cases you wish to distribute.
- Under Actions combo box, click on Distribute and select a plan from the list.

Note: Keep in mind that lead distribution works on assigned cases as well, and changes their assignments according to the selected plan at the time of execution. So, be careful on what case filter you are applying the distribution action, and what cases you are selecting to distribute.
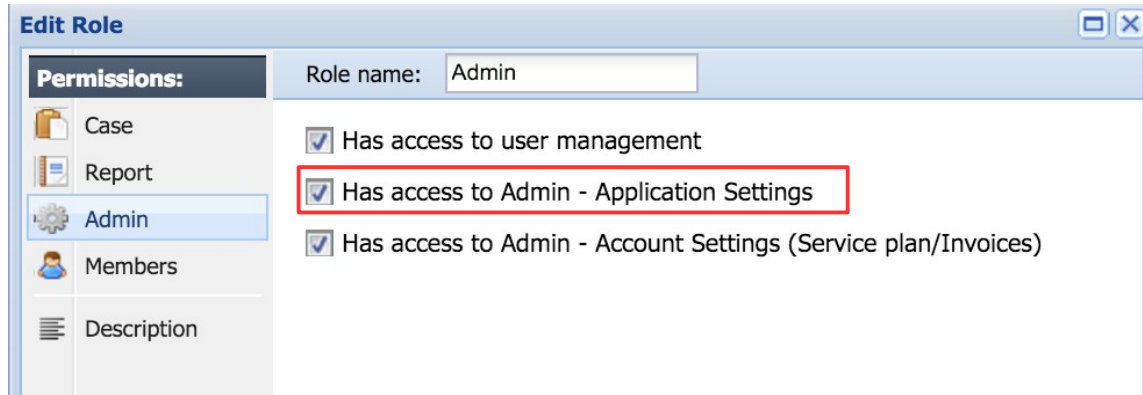
Permission

All roles with permission to access case filter actions, have access to "Distribute" function.

Logics

Only roles with Admin permissions have access to Lead Distribution plan design.

Distribution Example

Let's say we have 22 leads to distribute among 6 users. Below is how each round and cycle would look like:

Users	Ratio	Cycle 1			Cycle 2		
		Round 1	Round 2	Round 3	Round 4	Round 5	Round 6
Peter	3	1	1	1	1	1	1
Bob	2	1	1	0	1	1	0
Jack	1	1	0	0	1	0	0
Bryan	3	1	1	1	1	1	1
Frank	1	1	0	0	1	0	0
Joe	1	1	0	0	1	0	0