

# DYL's Lead Routing

New Features | V2. 2.8.16

The screenshot displays the 'Settings / Lead Routing' interface in DYL. At the top, there is a navigation bar with 'View Leads', 'Hotlist', 'Folders', 'Calendar', 'Campaigns', 'Reports', and a search bar. The user is identified as 'Adam Adamson, Lead Status: ON'. Below the navigation, there are buttons for 'Create Route' and 'Back To Users'. A red banner at the top of the settings area reads 'Lead Routing Update: Watch the video or Download the user guide.' The main section contains a table with columns: 'Type', 'Distribution Type', 'Route Destination', and 'Distribution Method'. Below this is a 'Location Route' section with an 'Add Location' button and a table with columns 'Name' and 'Location'. At the bottom, there is a table with columns 'At Time' and 'Actions'. A circular callout highlights the 'Location Route' section.

Type	Distribution Type	Route Destination	Distribution Method	Actions
Autoloan	Lead Connect	All Users	Round Robin	✕ ✓
Any	Auto Assign	All Users	Round Robin	✕ ✓
Default Routing	Lead Connect	All Users		✕ ✓

Name	Location
ZIP	Zip
	90019, 90035
	54343, 88844, 89080

At Time	Actions
8:00 am	✕ ✓

# 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.

**Settings / Lead Routing**

**Lead Routing Update: Watch the video or Download the user guide.**

**Lead Route** [Create Route](#) [Back To Users](#)

Source	Type	Distribution Type	Route Destination	Distribution Method	Actions
Any	Any	Lead Connect	All Users	Round Robin	✕ ✓
Default Routing		Lead Connect	All Users	Round Robin	✕ ✓

**Location Destination** [Add Location](#)

Name	Location	User Destination	Actions
Location Name	Zip	All Users	✕ ✓

**Update: This is for set-up purposes only until the official release.**  
This new section, "Retry Calls Missed By Agent" replaces "Automatic Callbacks." Calls will continue until a user presses "1" moving a lead into a workflow.

**Retry Calls Missed By Agent** [Add Call](#)

Call In	How Many	At Time	Actions
Days	1	8:00 am	✕ ✓
Hours	0	N/A	✕ ✓
Day	1	10:00 am	✕ ✓
Days	15	10:00 am	✕ ✓

# Lead Routing Overview

The screenshot displays the DYL Lead Routing configuration page. At the top, there's a navigation bar with 'View', 'Leads', 'Hotlist', 'Folders', 'Calendar', 'Campaigns', 'Reports', and a search bar. The user is identified as Adam Adamson, Lead Status: ON.

**Lead Routing Update:** Watch the video or Download the user guide.

**Lead Route Table:**

Lead Route	Source	Type	Distribution Type	Route Destination	Distribution Method	Actions
	Call	Contact	Auto Assign	All Users	Round Robin	[Icons]
	Any	Commercial	Lead Connect and A	All Users	Ratio	[Icons]
	Any	Auto	Lead Connect	All Users	User Order	[Icons]
Default Routing			Lead Connect	All Users	Round Robin	[Icons]

**Location Destination Table:**

Name	Location	User Destination	Actions
West Coast	Default State	All Users	[Icons]
Test	Default Zip	All Users	[Icons]
	90021 90034 90045	All Users	[Icons]
	90021, 90034, 90045	All Users	[Icons]
East Coast	Default State	All Users	[Icons]

**Retry Calls Missed By Agent Table:**

Call In	How Many	At Time	Actions
Days	1	8:00 am	[Icons]
Hours	1	N/A	[Icons]
Days	10	9:00 am	[Icons]
Days	2	9:00 am	[Icons]

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

Add a new Lead Route

This goes to the User Accounts/Additional Users Page

- **Round Robin:** Distributes leads in a rotation.
- **Ratio:** Allows you to distribute different numbers of leads to users. (You can set up ratios in User Accounts).

Settings / Lead Routing

Lead Route	Source	Type	Distribution Type	Route Destination	Distribution Method	Actions
	Any	Autoloan	Lead Connect	All Users	Ratio	+ - ✎
	Any	Any	Auto Assign	All Users	Round Robin	✕ ✓
	Any	Auto	Auto Assign	All Users	Round Robin	+ - ✎
Default Routing			Lead Connect	All Users	Ring All	✎

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

# Lead Route: Settings

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

Settings / Lead Routing

**Lead Routing Update:** [Watch the video](#) or [Download the user guide](#).

**Lead Route** [Create Route](#) [Back To Users](#)

Source	Type	Distribution Type	Route Destination	Distribution Method	Actions
Precise	Auto	Lead Connect	All Users	Ring All	✖ ✓
Default Routing		Auto Assign	All Users		📄 ✎
Test	Annuity		All Users	Round Robin	📄 ➕ 🗑 ✎

**Actions**

**Edit Templates**

**Route Templates**

Email Template: None

Text Template: None

Cancel Upload

This icon allows you to select/edit email or text templates

**Actions**

**Add Route**

Add your additional routes as needed

**Actions**

**Delete**

Delete Route

Delete

✖ No ✓ Yes

**Actions**



**Edit**

Edit/customize your existing route



# 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	Type	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.

Source	Type	Distribution Type	Route Destination	Distribution Method	Actions
QuoteWizard	Any	Auto Assign	All Users	Round Robin 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).

Source	Type	Distribution Type	Route Destination	Distribution Method	Actions
QuoteWizard	Any	Lead Connect	All Users	Ring All Round Robin User Order Ratio	 
Default Routing		Auto Assign	All Users		 

**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	Type	Distribution Type	Route Destination	Distribution Method	Actions
QuoteWizard	Any	Assign Afterhours	All Users	Ring All	 

# Additional Lead Distribution Setup

## User Roles

We made improvements to Roles. You can now be a part of more than one role!

1. Create User Roles for your User Accounts  
(Settings > User Roles > Add Role)

2. Assign Users to appropriate Roles  
(Edit Role > Select each member > Update)

Add a new role

Settings / Configure User Roles

User Roles	Users	Command
Name	Big Bad Wolf, Stacey Rad	
Sales	<input type="checkbox"/> (None) <input checked="" type="checkbox"/> Big Bad Wolf <input type="checkbox"/> Cameron Ten <input checked="" type="checkbox"/> Stacey Rad <input type="checkbox"/> Kendrick Lamar	<a href="#">Update</a>   <a href="#">Cancel</a>
Service		<a href="#">Edit</a>   <a href="#">Delete</a>

Lead Routing Update: [Watch the video](#) or [Download the user guide](#).

Lead Route

[Create Route](#) [Back To Users](#)

Source	Type	Distribution Type	Route Destination	Distribution Method	Actions
Any	Any	Lead Connect	All Users	Round Robin	<a href="#">✕</a> <a href="#">✓</a>
Call	Contact	Auto Assign	Roles	Round Robin	<a href="#">📄</a> <a href="#">+</a> <a href="#">-</a> <a href="#">🗑️</a> <a href="#">✎</a>
Any	Commercial	Lead Connect and Assign when closed	a	Ratio	<a href="#">📄</a> <a href="#">+</a> <a href="#">-</a> <a href="#">🗑️</a> <a href="#">✎</a>
Any	Auto	Lead Connect	b	User Order	<a href="#">📄</a> <a href="#">+</a> <a href="#">-</a> <a href="#">🗑️</a> <a href="#">✎</a>
Any	Auto	Lead Connect	c		<a href="#">📄</a> <a href="#">+</a> <a href="#">-</a> <a href="#">🗑️</a> <a href="#">✎</a>
Default Routing		Lead Connect	d	Round Robin	<a href="#">📄</a> <a href="#">✎</a>
			Location Routing		
			All Users		

Now, you can select "Roles" under "Route Destination" if you would like the group to receive real-time leads through this customized lead route.

# Location Route

### Location Route

[Add Location](#)

Name	Location	Route	Actions
<input type="text" value="Location Name"/>	<input type="text" value="Zip"/>	<input type="text" value="All Users"/>	<input type="button" value="X"/> <input type="button" value="✓"/>
ZIP	Zip	All Users	<input type="button" value="+"/> <input type="button" value="X"/> <input type="button" value="✎"/>
	90019, 90035	All Users	<input type="button" value="X"/> <input type="button" value="✎"/>
	54343, 88844, 89080	Bester	<input type="button" value="X"/> <input type="button" value="✎"/>
State	State	All Users	<input type="button" value="+"/> <input type="button" value="X"/> <input type="button" value="✎"/>
	AZ	Lead Group 1	<input type="button" value="X"/> <input type="button" value="✎"/>
	CA	Tester	<input type="button" value="X"/> <input type="button" value="✎"/>

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

**Update:** This is for set-up purposes only until the official release.

This new section, "Retry Calls Missed By Agent" will replace the "Automatic Callbacks." These calls will continue until a user presses 1 moving a lead into a workflow.

**Retry Calls Missed By Agent** [Add Call](#)

Call In	How Many	At Time	Actions
Hour	1	N/A	  
<div style="border: 1px solid #ccc; padding: 2px;"><ul style="list-style-type: none"><li>Minutes</li><li>Hours</li><li style="background-color: #0070c0; color: white;">Days</li><li>Weeks</li><li>Months</li></ul></div>	<input type="text" value="10"/>	<input type="text" value="9:00 am"/>	 
	2	9:00 am	  

This functionality replaces what used to be "Missed By Agent retries." You can choose how often you want DYL to continuously call your producers back if they have failed to "press 1" on the original call attempt made by the Lead Connect distribution type.

**\*\*\*Once workflows are released\*\*\***

When your producer presses 1 to make a retry call, the lead will then become auto assigned to that producer and their personalized workflow will begin.

# Lead Routing Help Resources

Settings / Lead Routing

**Lead Route** [Create Route](#) [Back To Users](#)

Source	Type	Distribution Type	Route Destination	Distribution Method	Actions
Any	Auto	Lead Connect	All Users	Ring All	<a href="#">✖</a> <a href="#">✔</a>

**Location Route** [Add Location](#)

Name	Location	Route	Actions
Cats	Zip 02563	All Users	<a href="#">⊙</a> <a href="#">✖</a> <a href="#">✔</a>

**Update:** This section is for Callback Sequences which replaces the "Automatic Call Backs" Page.

**Callback Sequence** [Add Call](#)

Call In	How Many	At Time	Actions
Hours	3	N/A	<a href="#">✖</a> <a href="#">✔</a>
Hours	3	N/A	<a href="#">✖</a> <a href="#">✔</a> <a href="#">⊕</a>

Access new feature resources on the Help page:

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

Lead Routing 2.1.18

Office View

Recent Calls

Area	Count
Miss	123
Service	124

Service

Name	Count
Charlie Garcia	105
Dasha Greene	106
Christine Reynolds	107
Miguel Gomez	110
Daniel Sanchez	111

Call Queue-Ring All

Call Queue-Random

Call Queue-Longest Idle

Call Queue-Round Robin

04:23

Alaska

CA

Just Admin

DYL's Lead Routing - New Features Guide v1

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