Lead Distribution

09/03/2024 10:22 am CDT

Overview

Lead distribution is the process that enables new leads to be distributed directly to the organization that owns the zip/postal code included in the lead data.

Within a brand, you will assign with postal codes are owned by each location. When a lead comes in via an API key through a lead capture form, we'll take the postal code and see if a location matches. If so, the lead will be added to that location. If there are no matches, the lead will be left in the organization that owns the API key. We often refer to this as the "parking lot" organization. You may use Dispatch to manually distribute any leads here to the closest location (or reach out to the contact to let them know there are is not currently a location in their area).

We also support distributing leads based on LocationID (a value you can assign to each organization) as well as TerritoryID (values you can assign to accounting classes). We will check and distribute by LocationID first if there is a value in that field, then we will look for an accounting class with the TerritoryID (if populated). If there are no matches on either of those, then we'll continue to distibute based on postal code.

Lead Distribution Notifications

You can configure hours by day-of-week for Lead Distribution notifications.

Under **Control Panel > Notifications**, you can put in different time ranges for each day of the week. As long as at least one day has a time range in it, then we will only forward the lead notifications if there is a match for the current time. If you want leads forwarded only during normal hours on the weekends, you can specify "8a-8p" as a normal range for those two days. If you want leads to be forwarded only outside your normal hours, then you can specify the time range of your normal hours with an exclamation point in front, as in "!9a-5p" -- this says to forward the notification if the current time is not between 9am and 5pm.

To specify a full day range, use "12a-12a" to indicate don't forward for full day.

If the entry is empty for a given day of week, then leads will get forwarded as normal, regardless of time.