

Leads Engine Release 9.7

Leads Engine 9.7 release enhancements focus on delivering clarity and visibility of lead offering methods, claim times, and group level notifications as it relates to the Event Log. Additional enhancements include updates to Coverage Maps, lead routing, preparation for Custom Lead Sources in Source Manager as well as bug fixes.

Lead Offer Method (Phone/Text) is Now Displayed in The Event Log

When a lead is offered to an agent, the Event Log displays the agent's phone number on which the offer was made, followed by the claim time, and previously did not indicate if the lead was offered via Phone or Text.

Offers, Acceptance and Rejection will now include the lead offer method.

Round Robin Offer

[DAY], [DATE], [TIME]

[Agent Name] has been offered the lead via +1##### and has 3 minutes to accept. The lead has been offered via Phone and Text.

Round Robin Offer

[DAY], [DATE], [TIME]

[Agent Name] has been offered the lead via +1##### and has 3 minutes to accept. The lead has been offered via Phone.

Round Robin Offer

[DAY], [DATE], [TIME]

[Agent Name] has been offered the lead via +1##### and has 3 minutes to accept. The lead has been offered via Text.

Offer Result

[DAY], [DATE], [TIME]

[Agent Name] has accepted the lead via Phone.*

* Or Text

Offer Result

[DAY], [DATE], [TIME]

[Agent Name] has rejected the lead via Phone.*

* Or Text

Default Claim Time is Set to 3 Minutes When “Text” or “Text and Phone” is a Notification Method While Claim Times are Disabled

When the Claim Time option is disabled¹ in the Business Rule, the default claim time of “3 minutes” will be provided for agents who have lead notifications set as “Text” or “Text and Phone” in the Agent Profile². If the lead offer is not accepted within 3 minutes, the lead will be offered to the next available agent or be assigned to the admin group as per business rule applied.

Claim Time


Allow Claim Time

No

1 - Business Manager > Lead Distribution Rule > Lead Offer & Acceptance > Claim Time

Notifications? *	Notifications? *
<input checked="" type="checkbox"/> Text	<input checked="" type="checkbox"/> Text
<input type="checkbox"/> Phone	<input checked="" type="checkbox"/> Phone
<input checked="" type="checkbox"/> Email (required)	<input checked="" type="checkbox"/> Email (required)

2 - User Manager > Agent Profile > Primary Contact Information > Notifications

Event Log Changes to Support No Claim Time (Disabled) in Business Rule

When the Claim Time option is disabled in the Business Rule, the Event Log will display a default claim time of “3 minutes” for agents who have “Text” or “Text and Phone” selected in their Agent Profile. For Agents who have only “Phone” selected, the claim time will be displayed as “no claim time.”

Round Robin Offer [DAY], [DATE], [TIME]

[Agent Name] has been offered the lead via +1##### and has **3 minutes** to accept. The lead has been offered via Text.

Round Robin Offer [DAY], [DATE], [TIME]

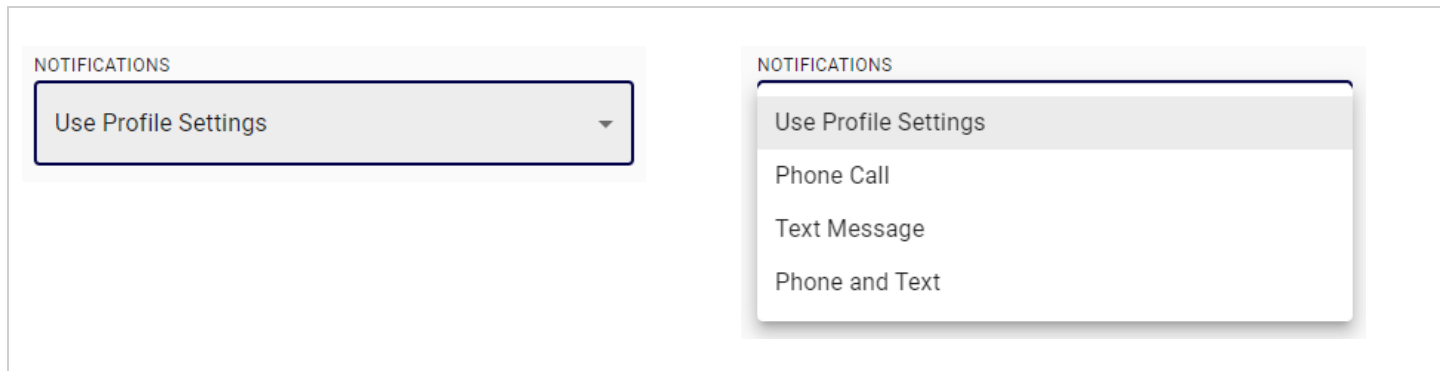
[Agent Name] has been offered the lead via +1##### and has **3 minutes** to accept. The lead has been offered via Phone and Text.

Round Robin Offer [DAY], [DATE], [TIME]

[Agent Name] has been offered the lead via +1##### and has **no claim time** to accept. The lead has been offered via Phone.

Event Log Changes to Support Group Level Notification Selection

The Notification method set at the Group level* will override the Notification method set in the Agent Profiles. In such scenarios, the Notification method set at the Group level will be displayed in the Event Log when documenting lead offers.



* Group Manager > Group > Notifications

If the Claim Time is enabled in the Business Rule, set to “Yes,” and a claim time is specified in minutes, the Event Log will display the claim time specified in the rule.

Round Robin Offer	[DAY], [DATE], [TIME]
[Agent Name] has been offered the lead via +1##### and has X minutes to accept. The lead has been offered via Text.*	

* Or “Text and Phone” or “Phone”

If the Claim Time is disabled in the Business Rule, set to “No,” the lead offer method will be displayed with “3 minutes” or “no claim time” as documented in the previous section “Event Log Changes to Support No Claim Time (Disabled) in Business Rule.”

The First 5 Digits of a 9-Digit Zip Code Received will be Used

When a lead is received with a 9-digit zip code (Example: 12345-7890), Leads Engine will only acknowledge the first 5 digits.

Previously, 9-digit zip codes would immediately halt. The enhancement will ignore the last 4 digits and attempt to match the lead to agents for lead offer using the first 5 digits of the zip code.

Update to “Created and Activated” Field in Source Manager

Previously, the fourth field/column visible in Source Manager displayed as “Created and Activated,” the column will be renamed to “Created” in preparation for Custom Lead Sources. The Date and Admin who created the source will be logged in to the “Created” column.

Example:

Status	Source and Form	Type and Delivery	Created
Active	example.com office contact form	Custom Source Proxy	[DATE] by [Admin]

Visibility of States Not Part of the Continental United States on Coverage Maps

Upon Coverage Map release (Release 9.6), the map initially displayed the continental United States with no highlighted areas and ability to zoom in to Hawaii and Alaska. Users with areas in these states will now be able to see highlighted areas and be able to zoom in.

Filter Enhancement to Support Group for Coverage Maps

A “filter by group” option is now available in Coverage Maps. This allows the user to view agent density of groups created in Group Manager.

Bug Fixes

- Listing Agent Claim Time is not recognized during Jump Ball Offers.
 - The claim time value entered for Listing Agents will be recognized.
- Agents can receive lead offers on the last day of their vacation.
 - Agent will not receive lead offers during the “End Date” specified under Vacation Mode.
- Agent’s time zone does not apply to their vacation start and end times.
 - Agent time zones will match the time zone specified in the Agent Profile when entering date into Vacation Mode.
- In Lead Manager, the “To date” field accepts dates that are older than the “From Date.”
- When disabling a day in the “Availability” setting found in the Agent Profile, the “Start Time” and “End Time” label overlay the field’s values.

Contact Information

Leads Engine consultative help or assistance with rules, email leadsengineteam@anywhere.re.

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