



Call Queue for End Users

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Call Queue

Call queue is a feature in the Total Expert platform that saves pre-defined filtering and prioritization rules to identify which leads in your list are the most important for you to connect with next. By having views with these rules set up, you can avoid manual filtering and searching to create a call list; each time you refresh the Call Queue page, the rules are reevaluated, highlighting your best opportunity to do business right away.

Call queue makes use of your lead data already stored in Total Expert; in addition to being the basis of the rules deciding which leads to highlight, important details about the lead, your interaction history, and more are shown. This quickly provides you with what you need to know—not only whom to call, email, or text—but also crucial context about them, so each message is appropriately personalized. Plus, you can log results of your interactions and set follow-up tasks all from the same page. All this allows you to better stay in front of your highest-value leads to attract and retain their business.

Your organization creates a standard set of prioritized views based on the things that are important to your particular business. A standard view uses the same rules for anyone in your organization with access to the view (showing only the leads of whichever user is viewing the page). However, you can also create your own custom views, where you can set your preferred rules for which leads should be listed and how they should be prioritized. Otherwise, any custom views you create work the same way, letting you review details and record the result of each interaction.



Standard Tab

Navigate to **Leads & Contacts** → **Call Queue**. If you have not yet created any custom views, the Standard tab is selected at the top of the page. If the Custom tab is currently selected, click the **Standard** tab.

On the Standard tab, you see views created by administrators in your organization, including views created for all users and those assigned to your teams. These views are fully defined and prioritized by administrators, and their rules are the same for any user with access (though each user would see only their own leads in the views). As a result, you cannot modify these standard views; if you feel a change in the setup of standard views is warranted, contact your system administrator (or consider creating a custom view for yourself; see Custom Tab below).

The header row of each view shows the title, description, and Sorted By rule defined for the view. This information is included to help you understand the intent of each view and why they are prioritized as they are.

The views are listed in the priority order defined by administrators, with the highest priority view at the top. A lead who meets the rules for more than one view will *only* be listed in the highest priority view they qualify for. If a lead's information changes and no longer qualifies for that view, they are removed and instead shown in the next-highest priority view they qualify for.

When you load the Call Queue page, the highest priority view is expanded by default; other views are collapsed. You can expand or collapse any view by clicking the **View Details** arrow button at the right end of that view's header row.

Leads in a View

Within a view, leads who qualify for the view are listed in the sort order defined as part of the view's setup. If the view includes more than 5 leads, only the first 5 are shown, but you can expand the view further by clicking the link in the view's footer row. If no leads qualify for a view, the message "No leads currently qualify for this view." displays when the view is expanded.

The screenshot shows the 'Call Queue' interface. At the top, there are tabs for 'Standard' and 'Custom', a search bar, and a 'Clear' button. Below this, there are two view cards. The first card, 'sample view 2', is expanded and shows a table of 5 leads. The second card, 'sample view 1', is collapsed and shows a message 'example with no qualifying leads'. Each lead row includes columns for name, loan amount, purpose, location, veteran status, calls, SMS, and email, along with action icons for phone, chat, and email, and an 'Actions' dropdown menu.

Lead Name	Loan Amount	Loan Purpose	Property Location	Veteran	Calls	SMS	Email
Stephen Sloan	\$0.00	---	---	No	0	0	0
Murray Andrews	\$0.00	---	---	No	0	0	0
Christopher Lawrence	\$0.00	---	---	No	0	0	0
Gerard Richard	\$0.00	---	---	No	0	0	0
Kelly Jones	\$0.00	---	---	No	0	0	0

Right away, each lead shows some basic information in columns selected by the administrator. Some common useful columns include:



- Loan Amount and Loan Purpose – This makes it possible for you to load the Call Queue page and immediately see what the lead’s business has looked like so far.
- Calls, SMS, Email – These indicate the number of times you have already reached out to the lead via each method through Total Expert.

At the right end of each row, you will see 5 items:

- A **Call** button (phone icon). If you have calling set up in Total Expert, you can click this button to open the dialer with the lead’s number ready to dial.
- An **SMS** button (conversation icon). If you have SMS messaging set up in Total Expert, you can click this button to open the conversation view for this lead.
- A **Log Outcome** button (paper icon). Click this button to open a slide-out panel to select an outcome from those defined for this view.
 - Some outcomes might be set up to update the lead’s Contacted On date; if you select one of these outcomes, a note appears below your selection before you save the outcome to alert you of this change. That way, you can be prepared if this removes the lead from the view on the next refresh.
 - You can also optionally add a note or a task to the lead record to save information or schedule a follow-up reminder along with the outcome to more fully document the interaction you had with the lead.
- An **Actions** menu. Click this menu to see a variety of lead-related actions you can take, such as sending an SMS or email. These are some of the same actions available through the full lead list; the exact options you see depend on your user role’s permissions. These actions make it possible for you to work with and record results of your interaction with the lead right from this screen.
- An arrow button. Click this button to expand the row and see more details for the lead. See Expanded Lead Details below.

Expanded Lead Details

When you expand the row for a lead within a view, an additional panel slides out below the original row and above the next listed lead. This panel includes further information to help you understand more about activity related to the lead. Each column has a different type of information:

- **Interaction History** – This is a list of various actions taken in relation to the lead. This includes automatically and manually sent emails and the lead’s interactions with them (opens, clicks, and so on), any notes attached to the record (including private notes), outcomes defined in the call queue, and any tasks that were defined while recording an outcome (other tasks are *not* listed here). The full history may not fit in this panel; click the **View full history >** button to open a slide-out panel with a full listing on the right side of the page.
- **Personal Info** – This section displays the lead’s phone number and email address. Click the **View all lead details** button to open the lead’s full details page in a new browser tab.
- **Rates Quoted** – This lists the 3 most recent interest rates that have been quoted to the lead, as retrieved through integrations with LendingTree and Mortech.
- **Active Journeys (#)** – This section summarizes each journey the lead is currently on in the Total Expert platform. The number in the heading of this section is the number of journeys. Click the **View all journeys >** button to open a slide-out panel on the right side of the page. This panel lists all active journeys, followed by all ended journeys the lead has ever been on (this section is collapsed by default).



You can expand the section for each journey to view more complete details. For active journeys, if the journey settings allow it, you can trigger the next step or stop the journey for that lead, just as you would from a contact details page.

- You can also trigger a new journey for the lead by clicking the **+Add Journey** button at the top of the panel.
- The last section includes buttons to view notes, loans, and tasks associated with the lead. A number is shown in parentheses for each to indicate how many are associated with the lead. Each button opens an associated slide-out panel.
 - **View Notes (#)** – The slide-out panel lists all the notes added to the lead record, including those associated with an outcome. The notes are listed in order of creation, with the newest note at the top. Each includes a menu where you can delete the note. You can also create a new note by clicking the **+Add Notes** button at the top of the panel.
 - **View Loans (#)** – The slide-out panel lists all the loans associated with the lead. Each includes a link to the loan’s full details page, which opens in a new tab.
 - **View Tasks (#)** – The slide-out panel lists all the incomplete tasks associated with the lead, including those associated with an outcome. The tasks are listed in order of due date, with the next due (or most overdue) task at the top. Each includes a menu where you can mark the task complete, edit the task, or delete the task. You can also create a new task by clicking the **+Add Task** button at the top of the panel. Below the list of incomplete tasks, you can expand a list of the completed tasks associated with the lead. When a task is marked complete, it is moved from the incomplete list to the completed list.

The screenshot displays a lead management interface. At the top, there are tabs for 'sample view 2' and 'example with over 5 qualifying leads'. The interface is sorted by 'Last Contacted Date'. Below this, a lead card for 'Stephen Sloan' is shown with fields for Loan Amount (\$0.00), Loan Purpose, Property Location, Veteran status (No), Calls (0), SMS (0), and Email (0). To the right of these fields are icons for phone, chat, and a lock, along with an 'Actions' dropdown menu. The main content area is divided into several sections: 'Interaction History' with a timeline of events like 'Journey Triggered', 'Journey Ended', and 'Journey Status Changed'; 'Personal Info' with fields for Cell Phone and Email; 'Rates Quoted' showing 'No recent rates quoted'; and 'Active Journeys (1)' with details for a 'Task Outcome Test Journey'. On the right side of the main content area, there are links to 'View Notes (4)', 'View Loans (0)', and 'View Tasks (3)'. At the bottom of the lead card, there are links for 'View full history', 'View all lead details', and 'View all journeys'. Below the lead card, another lead card for 'Murray Andrews' is partially visible with similar fields.

Custom Tab

Note

The Custom tab is controlled by permission. See your system administrator if you think you should have access and do not see this tab.



Navigate to **Leads & Contacts → Call Queue**. If you have already created at least 1 custom view, the Custom tab is automatically selected when you load the page. If the Standard tab is currently selected, click the **Custom** tab at the top of the page.

Using custom views is only necessary if you want to see leads based on different criteria or in a different priority order than what is given in the standard marketer views. Setting up custom views allows you to decide for yourself how your call list is determined.

The Custom tab is where you will both edit and view the results of your custom views. You will have to toggle back and forth between edit and view modes on the Custom tab.

On the Custom tab, you will see only the views you have set up yourself. If you have not created any yet, a tile shows “No Custom Views” with links to create a new view. There are 2 ways to create a custom view:

- Using a marketer view from the Standard tab as a template to build from
- Building a new view from scratch

Views created by either method are listed together on your Custom tab. No other user sees anything you set up on their Custom tab, even if it is based on a marketer view.

Tip

You may want to start with a standard marketer view the first time to familiarize yourself with how a view’s setup results in the marketer view you are already familiar with.

Note

If you create a view based on a standard marketer view, changes made by the marketer to the original view are not carried through to your custom view. Likewise, changes you make to your custom view do not affect the original.

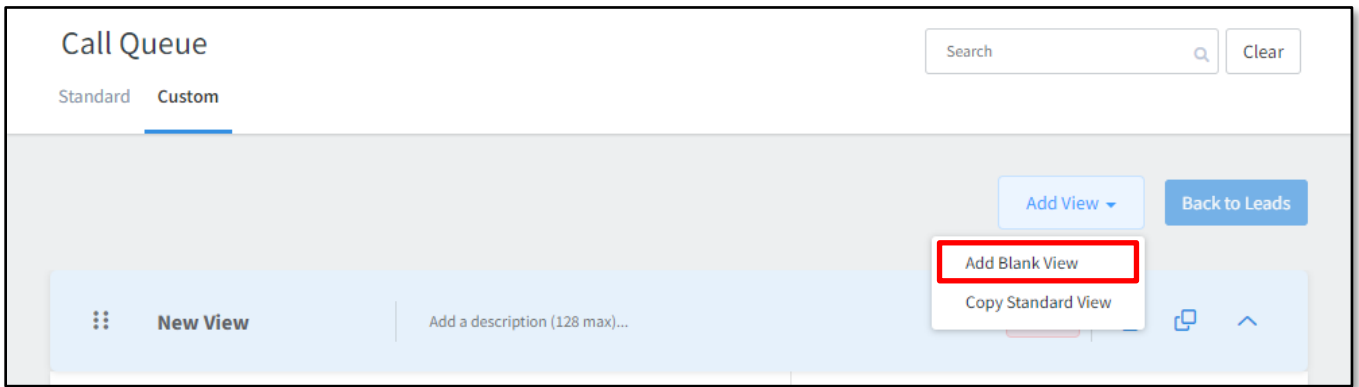
Views you create in the Custom tab have the same appearance and information as those on the Standard tab. The same details are shown for each lead listed.

Creating a View

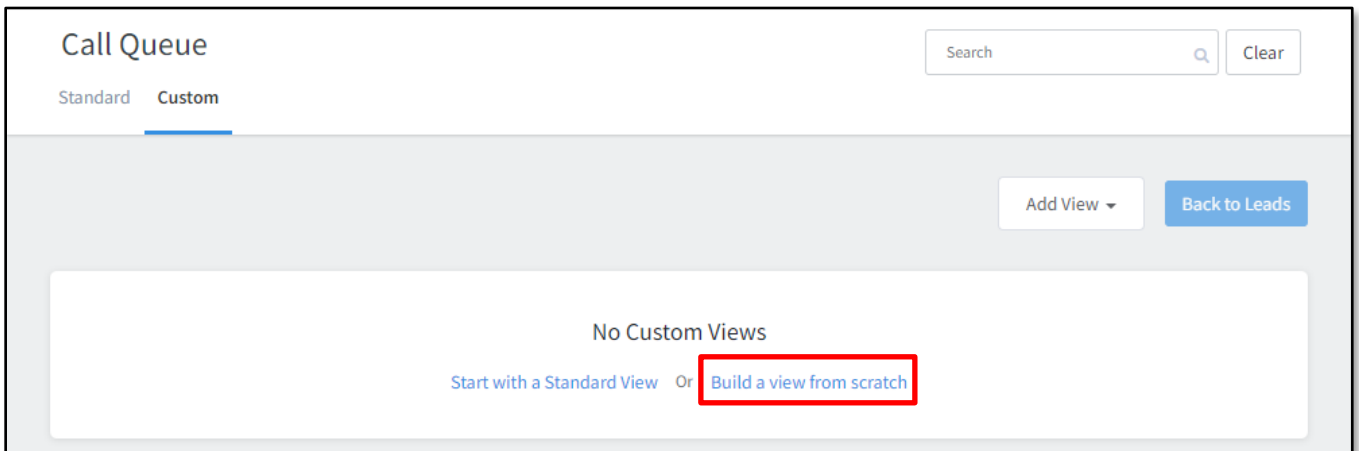
You can create a custom view either completely from scratch or by starting from an existing view from the Standard tab.

From Scratch

To create a view from scratch, select **Add View → Add Blank View**.



Alternatively, if you have not created any views previously, click **Build a view from scratch** in the box in the middle of the page.



Regardless of which method you use, the remaining setup proceeds the same way.

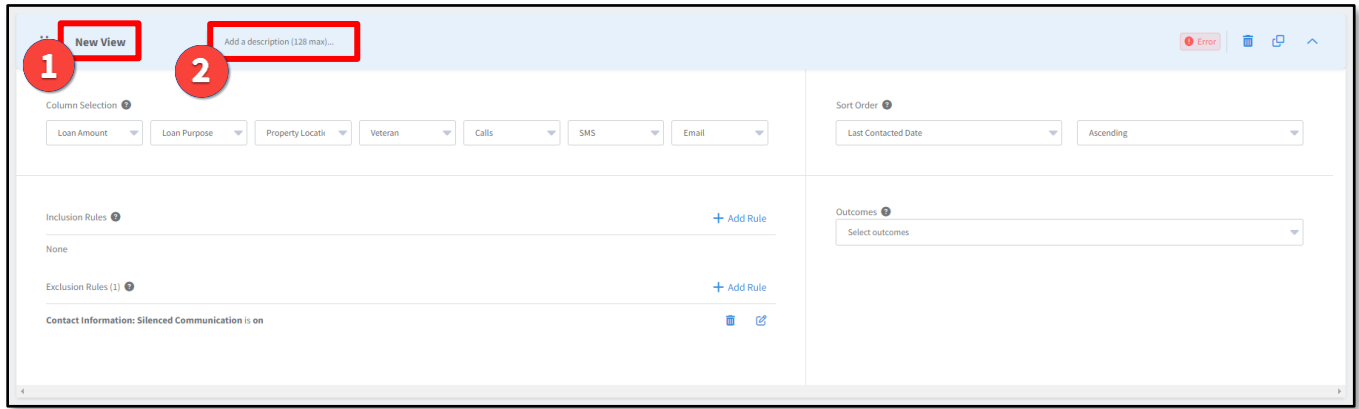
Note

A new view from scratch is immediately given the label *Error*. A view must have a title, at least one inclusion rule, and at least one outcome defined before it is considered valid. The default title is sufficient, but it should be changed to something meaningful.

Title and Description

Even though you are the only user who will see your custom views, it is still important to provide descriptive text to help remember what each view is.

1. Click on the text **New View**, clear this default title, and enter a suitable title for the view.
2. Click on the **Add a description (128 max)...** text placeholder and enter a suitable description.



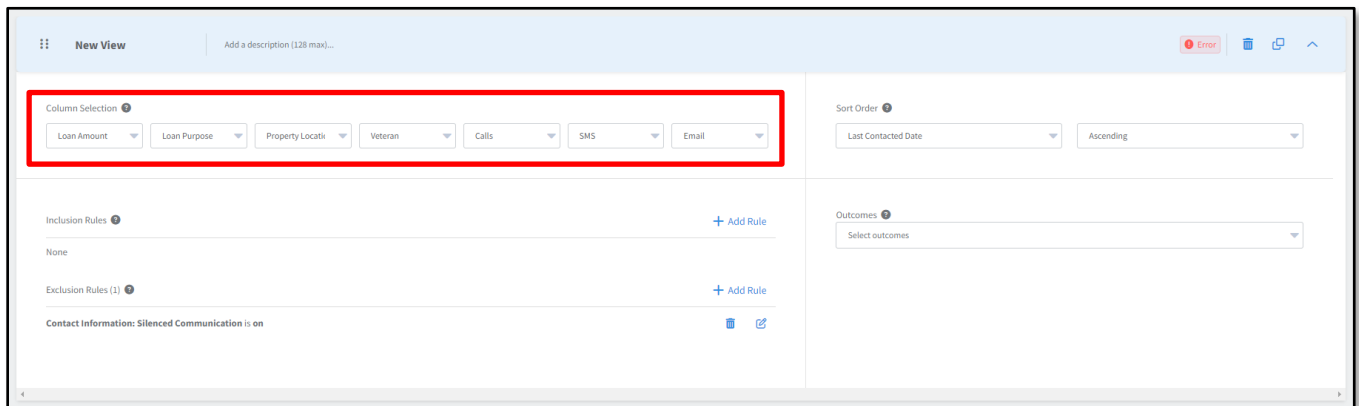
Column Selection

Note

The Column Selection portion is controlled by permission and may not be available to your organization.

You can define up to 7 primary columns of data shown in the view. You can select different columns for each view, depending on the purpose and needs of each.

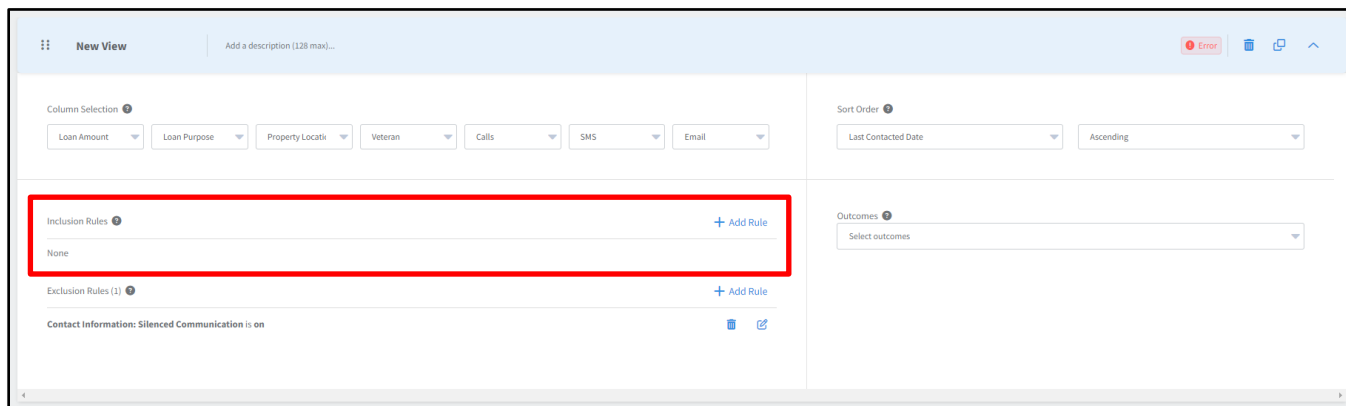
The drop-down menus that determine which columns to show are located at the top of the left column inside the view's expanded box. The columns you choose here are shown in the same order on your custom view. If you want to show fewer than 7 columns, select **None** in any remaining fields.



Inclusion Rules

Inclusion rules determine which of your leads should be listed in the view. Any lead that satisfies *all* of the inclusion rules is listed in the view (unless they are removed by an exclusion rule).

Inclusion rules are located in the middle of the left column inside the view's expanded box.



Rules are defined by specifying a standard field in a lead's record and a value (or range of values) for that field. For each lead record, the value in that field is compared to the rule, and the lead is included in the view if their value matches the rule. To add a new rule:

1. Click the **+Add Rule** button.
2. A slide-out panel appears on the right side of the page. In this panel, click the name of the field your rule should be based on.
 - a. If you know the name of the field, type any part of the name in the Search box at the top of the panel. The list is filtered to show only the field names matching the text you enter. (The Search box does not return results based on category headings, only names of individual fields.)
3. Depending on the data type of the field you selected, enter or select the values or range of values that the rule should use when comparing with each lead record.
 - a. Date range – Select either **In the next**, **In the last**, or **In the range**. Then enter a number, and select either **Days**, **Weeks**, **Months**, or **Years**. (The resulting rule reads something like “In the last 6 months”.) You can enter the number by typing directly or by clicking the up/down buttons. Lead records whose date in this field falls in the specified range are included in the view.
 - b. Numeric value – Select either **Greater than or equal to (\geq)**, **Less than or equal to (\leq)**, or **In the range**. Then enter a value or values. You can enter the number by typing directly or by clicking the up/down buttons. Lead records whose value in this field falls in the specified range are included in the view.
 - c. Drop-down list – Select 1 or more options from the list. You can type in the box to filter the available options. Lead records whose value in this field matches any of the selected options are included in the view. (If you select more than 1 option, the record only has to match 1 of the selections.) Fields with this type typically draw from a list of options defined elsewhere in the platform, such as Loan Purpose.
 - d. Text entry – Enter any text. Lead records whose value in this field at least partially matches the text are included in the view. The comparison is not case sensitive. For example, if you enter **st** in the City field, the rule would include leads in St. Paul, St. Louis, and Boston.
 - e. Radio buttons – Select 1 of the available options. Lead records whose value in this field matches the selection are included in the view.
 - f. Contact Survey Response – Select a survey question, select a Boolean comparison, and enter text to compare with (you will not see a list of possible options). Lead records whose response to the question matches the text are included in the view.
4. Click the **Save and Close** button.



The new rule is added to the Inclusion Rules section. The rule lists the field you selected and the comparison values you entered. At the right end of the row are Delete Rule and Edit Rule buttons.

You can add as many inclusion rules as you want, but only leads matching *all* of the inclusion rules are listed in the view.

To edit an existing rule:

1. Click the **Edit Rule** button (pencil icon) for any inclusion rule in the view.
2. A slide-out panel appears on the right side of the page. This panel includes a tile for each inclusion rule defined in the current view. Edit the parameters the same way you would when creating a new rule. You can edit multiple rules before saving.
3. Click the **Save and Close** button.

To delete an existing rule:

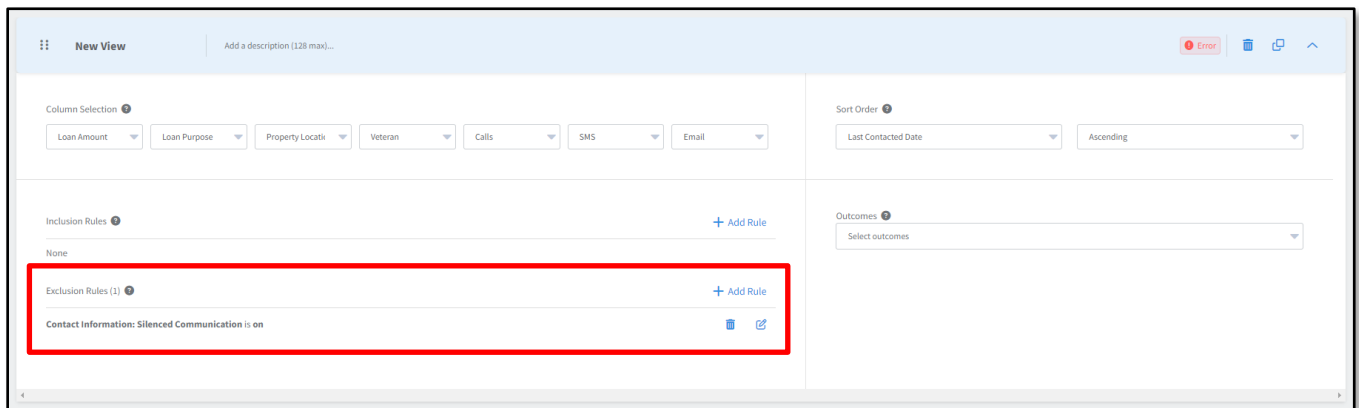
1. Click the **Delete Rule** button (trash can icon) for the rule you want to delete.
2. In the confirmation box, click the **OK** button.

The rule is removed from the Inclusion Rules section.

Exclusion Rules

Exclusion rules determine which of your leads should *not* be listed in the view. Any lead that satisfies *any* of the exclusion rules is not listed in the view (even if they would be included by an inclusion rule).

Exclusion rules are located at the bottom of the left column inside the view's expanded box.



Add, edit, and delete rules the same way you would with inclusion rules. The available fields and options are all the same.

Note

If the field checked by an exclusion rule is blank for a particular lead record, that rule will not exclude that record (though it could still be excluded by a different rule).

Similarly, if an exclusion rule is checking any loan-related field, a lead will not be excluded if there is no loan tied to that record.



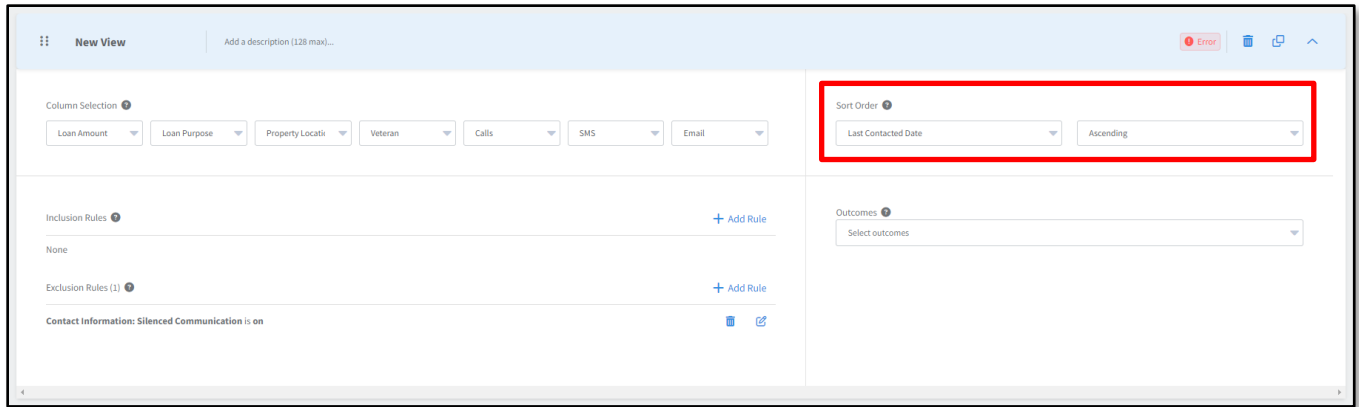
Tip

The exclusion rule “Silenced communication is on” is included with each new view by default. Leads who have been marked silenced are excluded by this rule. This helps prevent you from contacting anyone who has specifically asked not to be contacted.

Deleted leads are never shown in any view, regardless of any rules.

Sort Order

The sort order determines the priority of listed leads within the view. There are 2 drop-down menus that determine the sorting at the top of the right column inside the view’s expanded box.



1. In the first drop-down menu, select the field that should determine how the leads are sorted, such as **Last Contacted Date**. The options are limited and not configurable.

Tip

Consider selecting an option here that corresponds to a column you selected for the view earlier. The Sort Order rule is shown in the custom view, but this should help clarify for you how leads are ordered in the view.

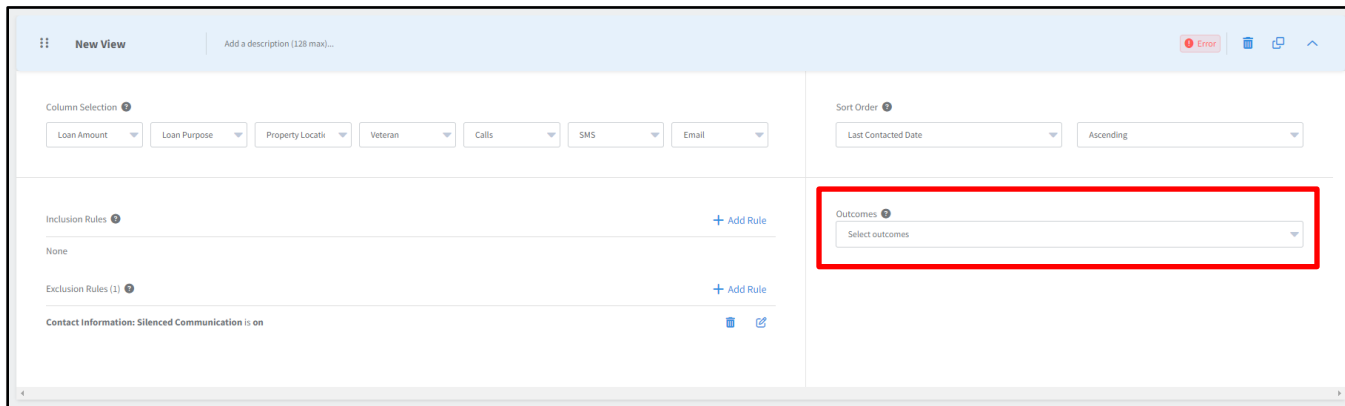
2. In the second drop-down menu, select the ordering to be applied to the field you just selected, such as **Descending**.

Outcomes

Outcomes are used to record how an interaction with a lead went. When you reach out to a lead in the view, you have the opportunity to select among the options you add here. That selection can be used to determine inclusion or exclusion rules in this and other views.

Only administrators can create and edit outcomes. However, you can add any outcomes created by an administrator for the organization, even if they are not available to select in any standard view.

Outcomes are located in the middle of the right column inside the view’s expanded box.



To add an outcome to a view:

1. Click in the **Select outcomes** box in the Outcomes section.
2. Select one or more outcomes from the drop-down menu. You can type in the box to filter the available options.

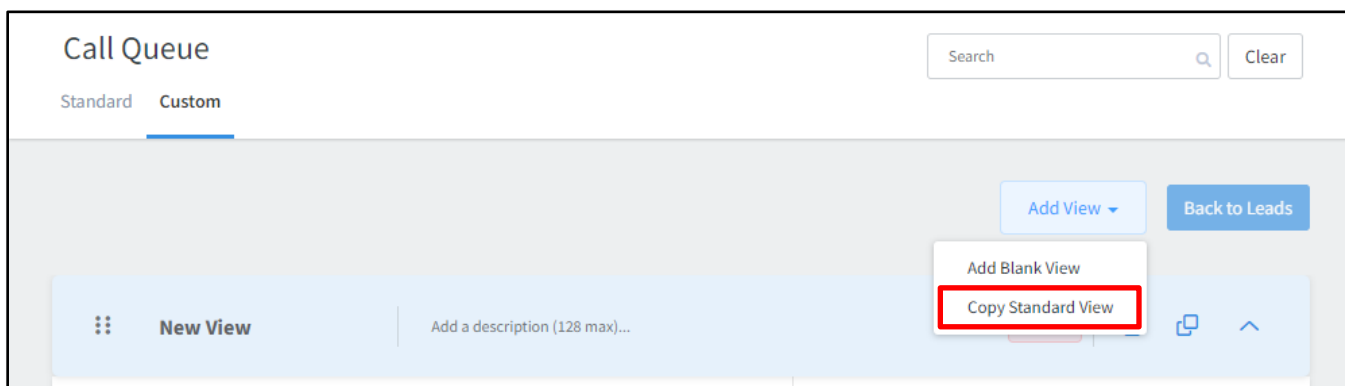
Tip

Consider including, at a minimum, at least 3 outcomes for each view: 1 positive outcome, 1 negative outcome, and 1 neutral outcome. This should account for a variety of possible results when you attempt to contact someone from this view.

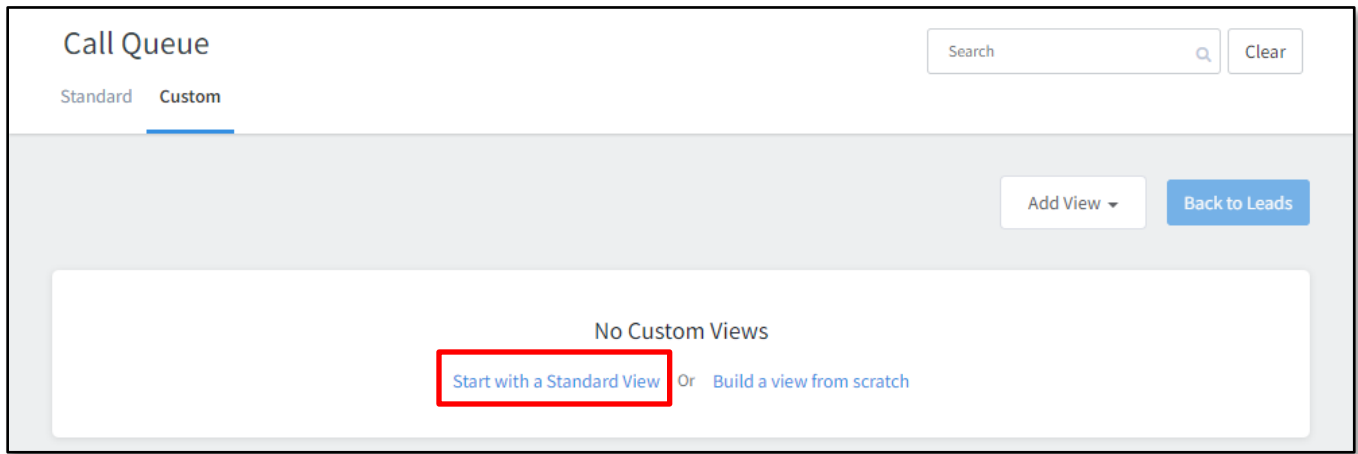
You can remove an outcome from a view by clicking the **X** on the label for the outcome you want to remove or by deselecting it from the drop-down menu.

Based on a Standard View

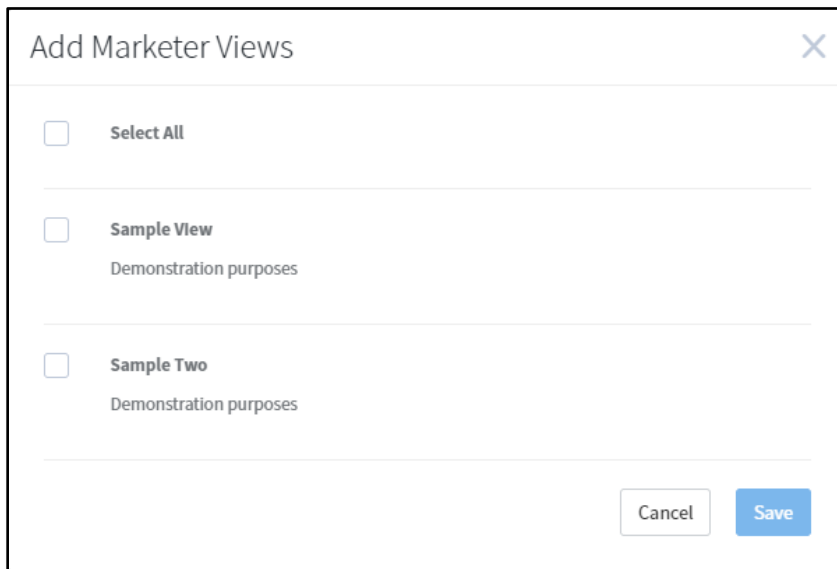
To create a view by copying a view from the Standard tab, select **Add View → Copy Standard View**.



Alternatively, if you have not created any views previously, click **Start with a Standard view** in the box in the middle of the page.



Either way, the Add Marketer Views box appears with a list of all the views available on the Standard tab (in the same order). Select the checkboxes for 1 or more of these views—or the **Select All** box to check all the boxes at once—then click the **Save** button.

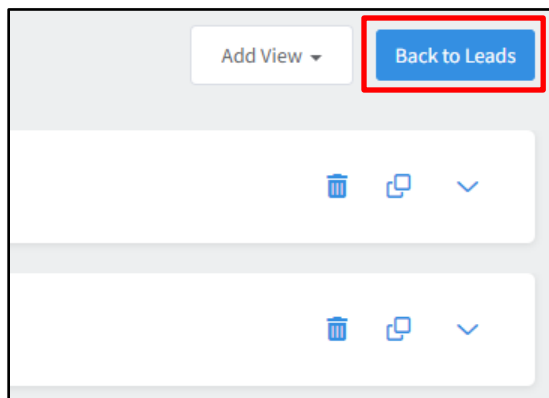


The marketer views are added to your custom list of views in the order that you selected their checkboxes, with the first one you checked added at the top. If you chose Select All, the views are added in the same order in which they appear on the Standard tab.

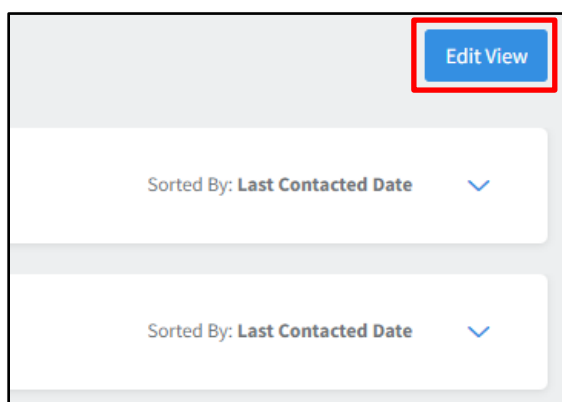
Expand each new view by clicking the **View Details** arrow button at the right end of the view. The methods for selecting columns, adding or removing inclusion rules and exclusion rules, setting the sort order, and selecting available outcomes for the view are the same as when creating a view from scratch.

Switching Between Edit and View Modes

At any time while editing your custom views, click the **Back to Leads** button to switch to view mode. Any views with the Error label are omitted in view mode but are saved so that you can continue working on them when you return to edit mode.



At any time while in view mode, click the **Edit View** button to switch back to edit mode.



If you navigate away from the Call Queue page then return, you will always see the Custom tab in view mode—even if you were in edit mode when you left.

Making Changes

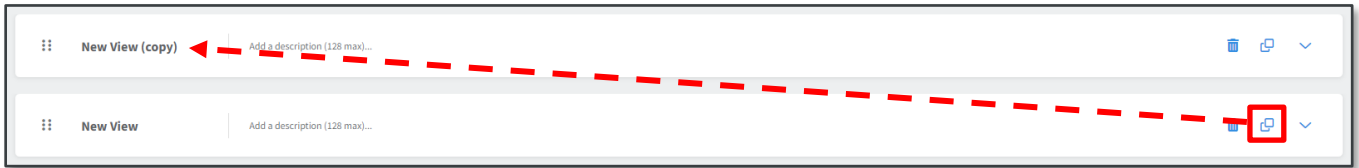
You are always able to update any part of the setup of your Custom tab. The following sections assume you are already viewing the Custom tab in edit mode.

Editing a View

You can change any part of the setup of your custom views. Simply expand the view's row and make selections in the view editor the same way you would when setting up a new view. The changes take effect as soon as you switch back to view mode. Remember that a view without an inclusion rule or without an outcome is considered invalid and is omitted from view mode.

Copying a View

If you want to make a view that is very similar to one of your existing custom views, you can copy the existing view and adjust the new copy as desired. In edit mode, click the **Copy View** button near the right end of the existing view. The new view is added immediately above the view you copied and given the same title with **(copy)** added. All other aspects of the view are the same as the copied view. Edit the view as desired, especially updating the title.



Prioritizing Views

While in edit mode, you can rearrange views to change their priority order in the list. The view at the top is given the highest priority. A lead only appears in the highest priority view for which they qualify, so you see them for the highest priority reason.

To change the position of a view in the list, click and hold the **Move View** button at the left end of the view and drag the view to the new desired location.



Deleting a View

While in edit mode, you can remove views from the list. To remove a view, click the **Delete View** button near the right end of the view, then click the **Ok** button in the confirmation box. Once a view is deleted, it cannot be recovered.

