



# Claimable Leads Queues

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## Introduction

A claimable leads queue is a variation of Total Expert’s call queue feature. Instead of showing a user a list of their own existing leads, however, the claimable leads queue shows a common list of leads to any user with access to view the queue.

From this list, a user can claim a lead and then work that lead as usual. Once a user has claimed a lead from the list, that lead is removed from all users’ versions of the list so that other users cannot also claim the same lead.

By placing leads in a central location where users can competitively claim them, leads are more likely to be contacted quickly, which leads to a higher conversion rate and a stronger pipeline for your organization.

## Workflow

As with a call queue in Total Expert, an administrator or manager uses the call queue builder to set up a claimable leads queue. This includes determining which users in their organization are able to see the queue.

End users, such as loan officers, who have been granted access can then view the claimable leads queue and claim the leads that appear there.

## Use Cases

The most common use cases for a claimable leads queue are:

- Aged leads – Leads who have not been contacted by the user who was originally assigned the lead within a set period of time.
- Orphaned leads – Leads who were assigned to users who are no longer with the company and should be claimable by other users.

Of course, you can use the feature to distribute leads in any way that is appropriate for your organization.



# Feature Setup

For users with access to the call queue feature, no further setup is required to use claimable leads queues.

## How to Use

### Building a Claimable Leads List (Administrator)

1. Navigate to **Manage Marketing → Call Queue Builder**.
2. Click the **+Add View** button to create a new queue.
3. Set up the queue with a name, description, columns, inclusion and exclusion rules, sort order, and team assignment (all teams or selected teams only)—just as you would with any other call queue. See *Call Queue for Administrators* for more details on setting up call queues.

#### Tip

To create a queue of blind leads, set all the drop-down lists in the Column Selection section to **None**. This provides no details about a lead on the end users' view except their name.

The screenshot shows a section titled "Column Selection" with a help icon. Below the title are seven dropdown menus, each displaying the word "None".

Otherwise, you can select the relevant information that you want to show to users before they claim a lead.

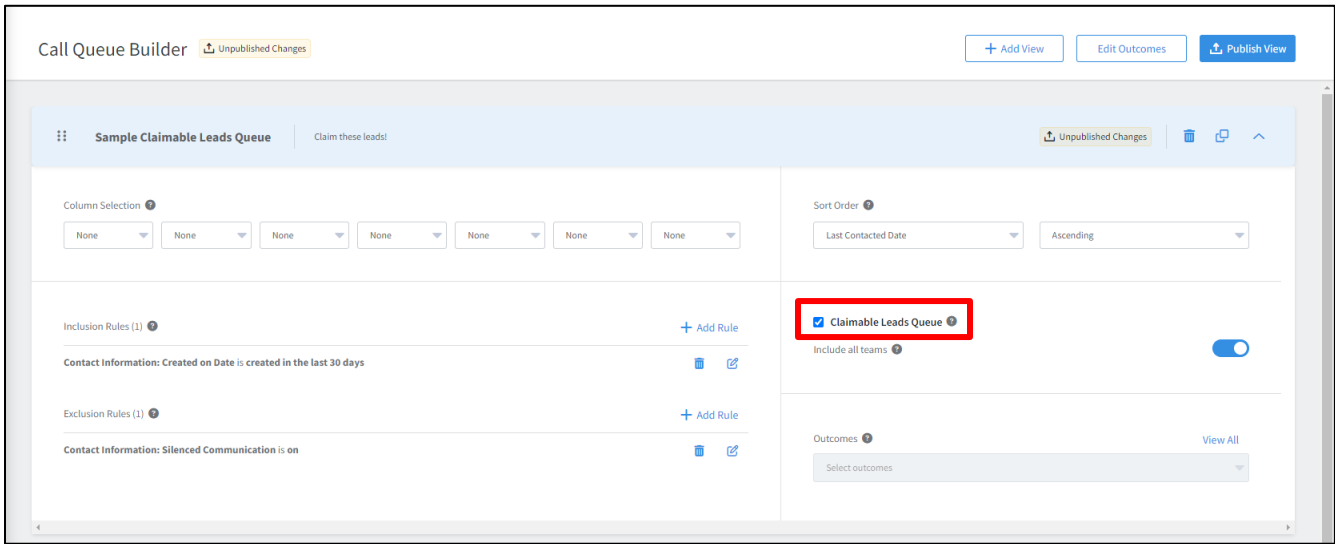
#### Note

When selecting teams, this only determines which users are able to see the claimable leads queue. It does not limit whose leads appear in the queue; leads that originate anywhere in the organization are shown unless inclusion and exclusion rules are set up to limit which leads appear.

4. Check the **Claimable Leads Queue** box.

#### Note

When this box is checked, any selections made in the Outcomes field are cleared and the drop-down list is grayed out. (Even if the box is then unchecked, previous selections are not restored.) Users do not use a claimable leads queue to work with leads in any fashion, only to claim them, so outcomes are not used.



5. Click the **Publish View** button in the upper-right corner of the page.
6. Click the **Ok** button in the confirmation box.

**Note**

An end user cannot create a claimable leads queue from the Custom tab of the Call Queue page. The Claimable Leads Queue option is only available to administrators on the Call Queue Builder page.

## Claiming a Lead (End User)

1. Navigate to **Leads & Contacts** → **Call Queue**.
2. Locate a claimable leads queue and click the **View Details** (down arrow) button on the right side to expand it.

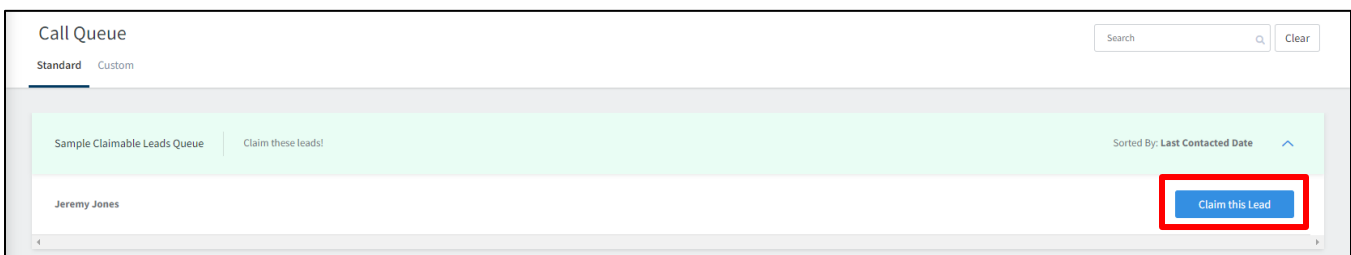
**Tip**

The headers for claimable leads queues are highlighted in light green (regular call queues are white).

3. Find a lead you want to work. Click the **Claim this Lead** button on the right side.

**Note**

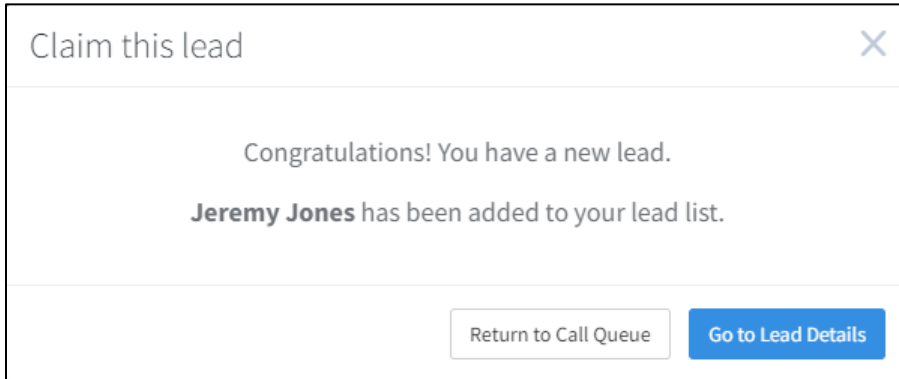
Leads listed in a claimable leads queue are not expandable. Only the basic details (if any) selected by the administrator to display in the queue are visible until you claim the lead. The example shown below is a blind lead, as set up by the Tip in the previous section; no details are available until you claim the lead.



4. The lead disappears from the list and a confirmation box appears to indicate that you have a new lead. From this box, you can click either:

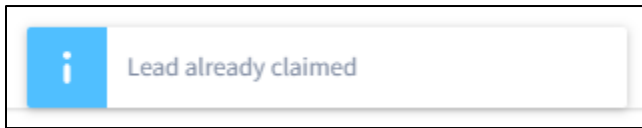


- a. the **Return to Call Queue** button – This closes the box and keeps you on the call queue page, where you can claim more leads from a claimable queue or work others from a standard queue.
- b. the **Go to Lead Details** button – This navigates to the lead details page for the lead you just claimed, where you can review their full details and begin to work the lead.



All users with access to a given claimable leads queue see the same list of leads in that queue. When a user claims a lead, that lead is removed from the queue in real time for all users.

If 2 or more users attempt to claim the same lead at approximately the same time, the system decides who was first and awards the lead to that user as described above. Meanwhile, the other user(s) would see a message at the top of the page that the lead has already been claimed.



**Note**

Once a lead has been claimed via a claimable leads queue, it cannot qualify for another claimable lead queue. This means it only can be placed in a claimable lead queue once in its history.