Focused View and Call Queue

At a glance, Total Expert’s focused view and call queue features appear very similar—and in fact they are:

- Administrators create both focused views and call queues that are available to their whole organization or selected teams. End users can create custom focused views and call queues that are available only to themselves.
- Both are used to surface potential customers from your existing database based on specified criteria.
- Each is best used as a call list and a primary tool for users to access daily to know whom to talk to.
- On both, users can log outcomes, take notes, and assign tasks. They can also take administrative actions such as sending a text or email, adding to a group or a journey, and more.

However, there are several key differences. These are summarized in the table below.

Focused View	Call Queue
Available to users with the Total Expert CRM	Available to users with Advanced Lead Management
Displays contacts	Displays leads
Displays last transaction loan data Does *not* display lead or opportunity data	Displays lead property data Does *not* display loan data
Refreshes only when the page is reloaded	Refreshes in real time (the page does not need to be reloaded)
No claimable views option	Claimable leads queue feature available (except in custom queues)
A view only displays contacts in the database of the user accessing the view.	A normal (non-claimable) queue only displays leads in the database of the user accessing the view. A claimable leads queue displays all leads that qualify across the organization. It is not specific just to the user accessing the queue. Claimable leads queues can appear on the same page with normal queues.
A contact can only show up in one view at a time. Views are ranked based on their position on the page, so a contact only shows in the highest view for which they qualify.	A lead can show up in more than one queue if they qualify.
Outcomes can: • Update Last Contated On date • Trigger journeys • Move contacts into other views	Outcomes can: • Update Last Contated On date • Change the Lead Stage • Trigger journeys • Move leads into other queues
Common use cases: • New contacts • Loan milestones • Post-close touchpoints • Customer Intelligence	Common use cases: • Lead source • Lead stage • Opportunity types • Number of contact attempts • Claimable leads (aged or otherwise available to be claimed) • Leads created and assigned from a holding account by Customer Intelligence alerts