User Availability

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Introduction

The user availability feature determines what days and times leads can be distributed to users. Administrators can set times that apply to all users in their organization. Individual users can toggle their own availability on or off within the times allowed by the organization. If there are no organization times set, users can toggle their own availability at any time.

Leads that would have been distributed during a time when no users are available are temporarily stored. These leads are distributed appropriately when an appropriate user becomes available.

Organization Setting

User Availability

An administrator can set availability times for all users in their organization to receive new leads with a single setup.

1. Navigate to **Leads & Contacts → Lead Management → Lead Settings**.
2. In the User Settings tile, click the **Edit** button. The current lead distribution schedule is shown in the User Availability section.
3. Click the **Edit** button in the upper-right corner of the User Availability section.
4. You can set a single lead distribution window for each day of the week:
   a. Check the box on the left to set a window for the corresponding day. The time selection box is activated for that day with default times selected.
   b. Click anywhere in the time selection box to open a drop-down box, which has separate sections for the start and end times of the distribution window.
   c. Under **Start Time**, select an hour and number of minutes past the hour to define when the distribution window opens.
   d. Under **End Time**, select an hour and number of minutes past the hour to define when the distribution window closes.
   e. Click the **OK** button in the lower-right corner of the drop-down box.

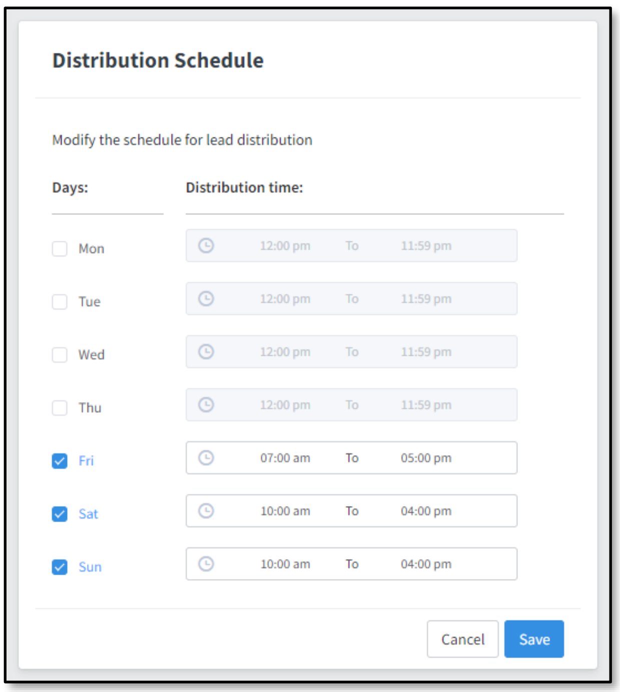
Tip

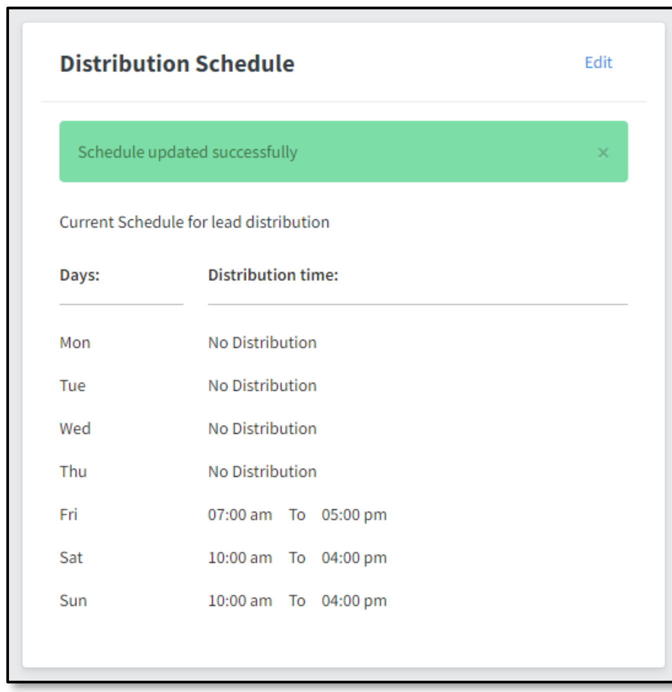
With the time selection box open, you can use the arrow keys [↑] and [↓] to set the value in each column and [←] and [→] to move between columns. Press [Enter] to accept the current values and close the selection box.

You can also use the [Tab] key to move the focus to move to the next available checkbox or time selection box and press [space bar] to toggle a selected checkbox on or off.

5. Repeat step 4 for each day of the week when a distribution window should be applied. Leave checkboxes unchecked for any days when lead distribution should not be restricted. You can set different start and end times on each day.
6. Click the **Save** button. The distribution schedule is updated with your changes. Any days that were not checked are labelled No Distribution, meaning lead distribution will not be restricted to any users on those days.

In the example shown below, leads are distributed to users between 7am and 5pm on Friday and between 10am and 4pm on the weekend, with no restrictions Monday through Thursday.





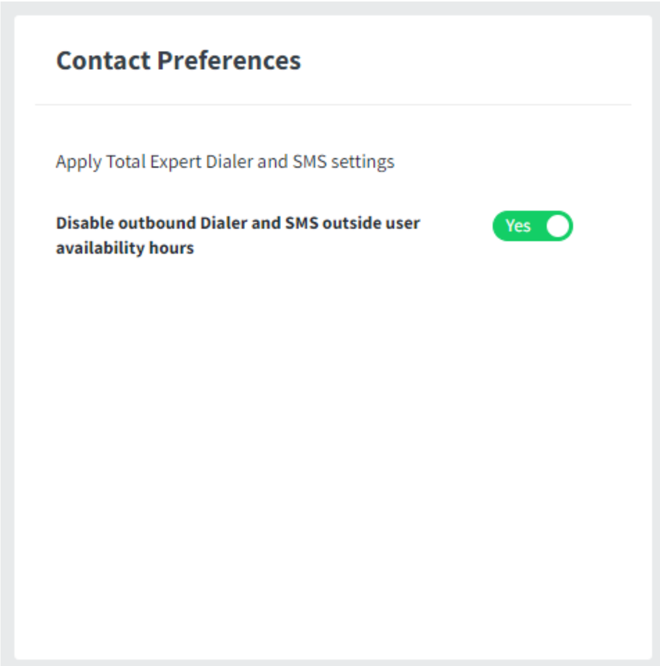
Note

The times set here apply to each individual user according to their local time zone. For example, suppose your organization has users in New York and Chicago. According to the example distribution schedule shown above, the New York users would start receiving their leads on Friday at 7am Eastern Time, whereas the Chicago users would begin receiving theirs at 7am Central Time.

Contact Preferences

An administrator can also set whether or not users are able to place calls or send SMS messages through the Total Expert platform during the restricted times. If this restriction is turned on, then users can only place outbound calls or send outbound SMS messages to their existing leads during times when they would be able to receive a new lead, as defined in the User Availability section.

In the Contact Preferences section, click the toggle switch to set it to **Yes** to implement this restriction for all users in your organization. When this is set to No, users may place calls and send SMS messages at any time.

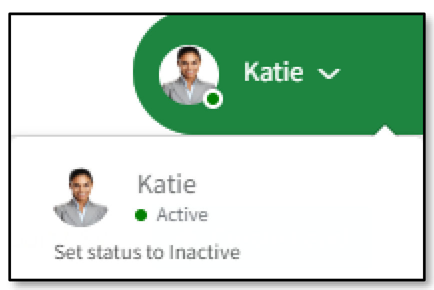


Individual Availability Toggle

During any lead distribution window set by the organization, a given user will have any relevant leads assigned to them. (Any leads that would have been assigned while the window was closed are distributed when the window opens.) However, an individual user might not want leads to be assigned to their account at certain times, such as during a lunch break or while on vacation. In this case, a user can toggle lead assignment off for their account and toggle it back on when they are ready to receive new leads again.

While logged in, you can see whether your user is available for lead distribution by checking the color of the dot next to their profile picture at the right end of the header bar on any page.

- When the dot is green, you are available to receive new leads.
- When the dot is white, you are not available. This could either be because the time is outside the organization-wide window or because your user is currently toggled off.



Click your name to open the settings menu. At the top of the menu, the dot is shown with the label Active or Inactive, as appropriate. Below this, you can click the **Set status to Inactive** or **Set status to Active** button to toggle availability off or on, respectively.

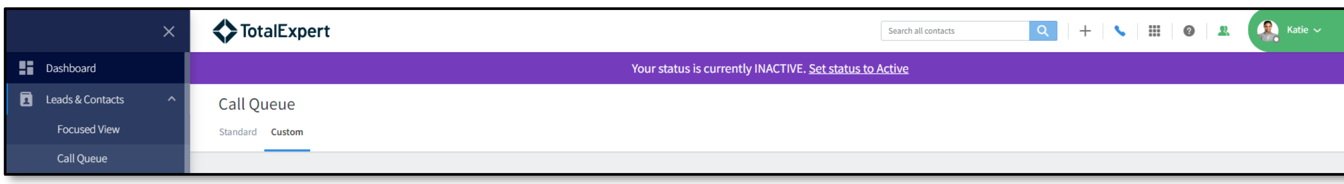
Note

If your status is currently Inactive because the time is outside your organization's distribution sechedule, you cannot toggle your status to Active. You must wait until the next window opens before you can change your status.

If your status was set to Inactive automatically because the distribution schedule window closed, you will be set to Active automatically when the next window opens.

If you manually set your status to Inactive, your status will remain Inactive until you manually set it back to Active, even if a new organization window opens. This allows you to set yourself Inactive when you will be unavailable for an extended period covering more than 1 day, such as during a vacation..

When you are viewing a page where you can contact a lead directly (the call queue or the lead list page) and your status is Inactive, a purple bar appears at the top of the page reminding you of your status. If you are within an organization distribution window, you can click **Set status to Active** in this bar to toggle your status. If the time is outside your organization's windows, you cannot toggle your status. When your status is Active, this bar is not shown.



While your status is Inactive, any leads that would have been assigned to you are assigned according to the lead source's routing and exception handling rules.