Inbound Call Sales Rep Assignment

This article provides instructions for launching the Inbound Call Sales Rep Assignment campaign that you can download for free from the Infusionsoft Marketplace.

When a new lead calls in, easily enter their information and assign the lead to a sales rep – all by filling out a single internal form .

1. Download the Inbound Call Sales Rep Assignment campaign from the Marketplace

2. Assign a Backup User to the Follow Up Task

   The only setup step is to choose who is the backup user to receive the follow up task; this is a built-in safety feature to ensure every task is assigned to a user.

   1. Double click on the Sales Rep Follow Up sequence.
   2. Double click on the New Lead Follow Up task.
   3. Select a user from the Assign to (backup) drop-down.
   4. In the upper right of the page, click Draft to change the task to the Ready status.
   5. Click on Back to Sequence in the upper left of the page.
   6. In the upper right of the page, click Draft to mark the sequence itself as Ready.
   7. Click Back to Campaign in the upper left of the page.

3. Publish the CAMPAIGN

   All items on this campaign by now should look light green/greyed out (just like the LEAD - Inbound Phone Call goal). This means we can safely Publish the campaign so it can be used.

   1. Click the Publish button in the upper right.
   2. Click the Publish button at the bottom of the campaign checklist to publish the campaign.

4. Start Assigning Inbound Phone Leads to Sales Reps

   Your campaign is ready to go! The next time you need to assign an inbound phone lead to a sales rep submit the "LEAD - Inbound Phone Call" internal form according to this tutorial.