Leads

Contacts

Accounts

RingLead Route

Automate routing of every lead that enters your system with RingLead - the system of record for processing customer data.

An unrefined lead routing process creates chaos in your organization: leads are incorrectly assigned, inexperienced reps are given high priority leads, and your sales follow up is delayed. The impact on sales productivity, and your brand's reputation, are tremendous, and no one at your organization can answer your burning question: "Where are my leads?"

Transform your lead routing process with RingLead, the central authority on customer data.

Strategically process and route every lead that enters your system, regardless of source, with RingLead Route. Our routing solution equips data operations professionals with complete control and visibility over their leads and all related processes. Configurable workflows, rules and criteria route inbound leads with unparalleled precision.

ROUTING AT A GLANCE

- **High-level conditions:** RingLead looks at four high-level conditions before routing to determine the appropriate workflow: Account match, Lead match, Contact match, and no match.

- **Rules:** Our advanced rules engine enables you to define under which conditions your Leads are routed to a Salesforce users.

- **Round Robin:** Configure round robin rules to assign leads to a specific group of users

- **Activity Reports:** View your routing activity with matching results, routing rule applied, owner assigned, and fields update all in one easy to view report.

- **Visual Display:** Easily view and edit your workflows, rule criteria, owner options, and field updates.
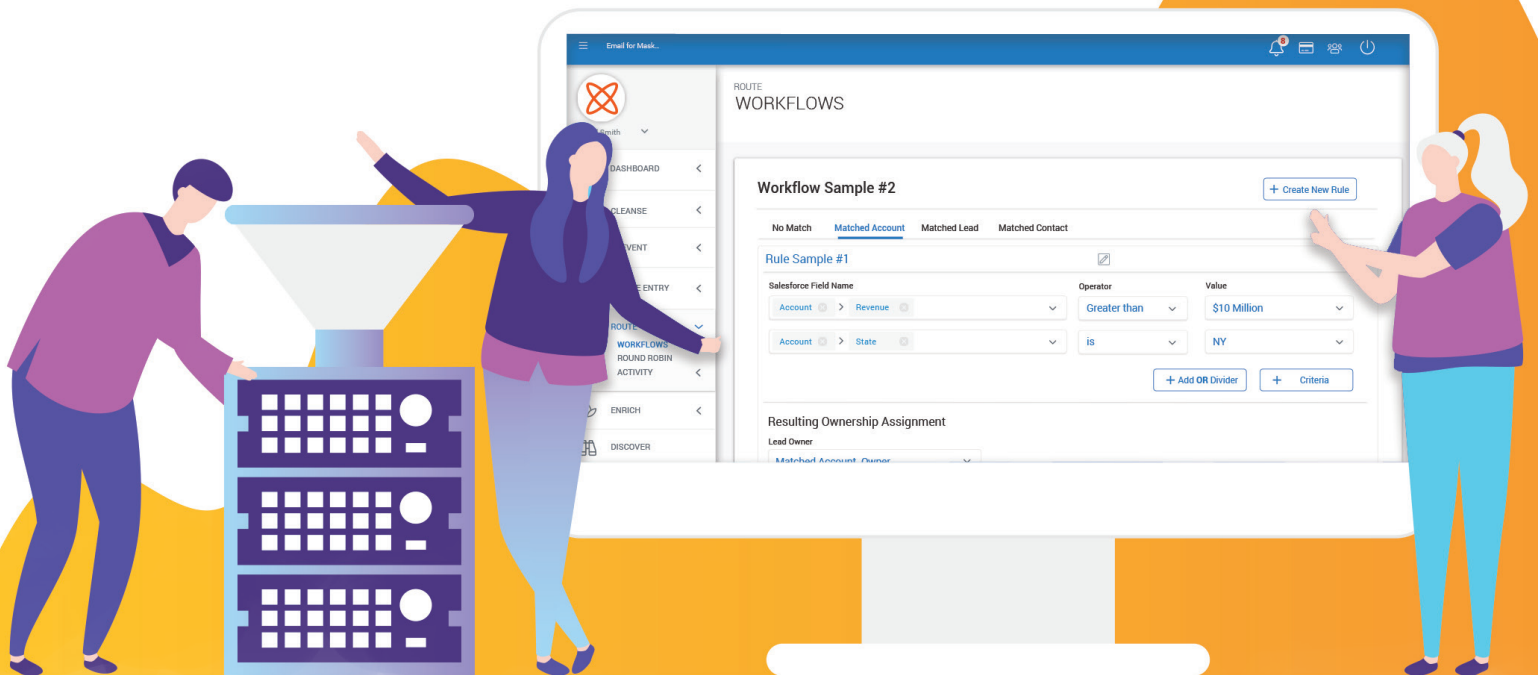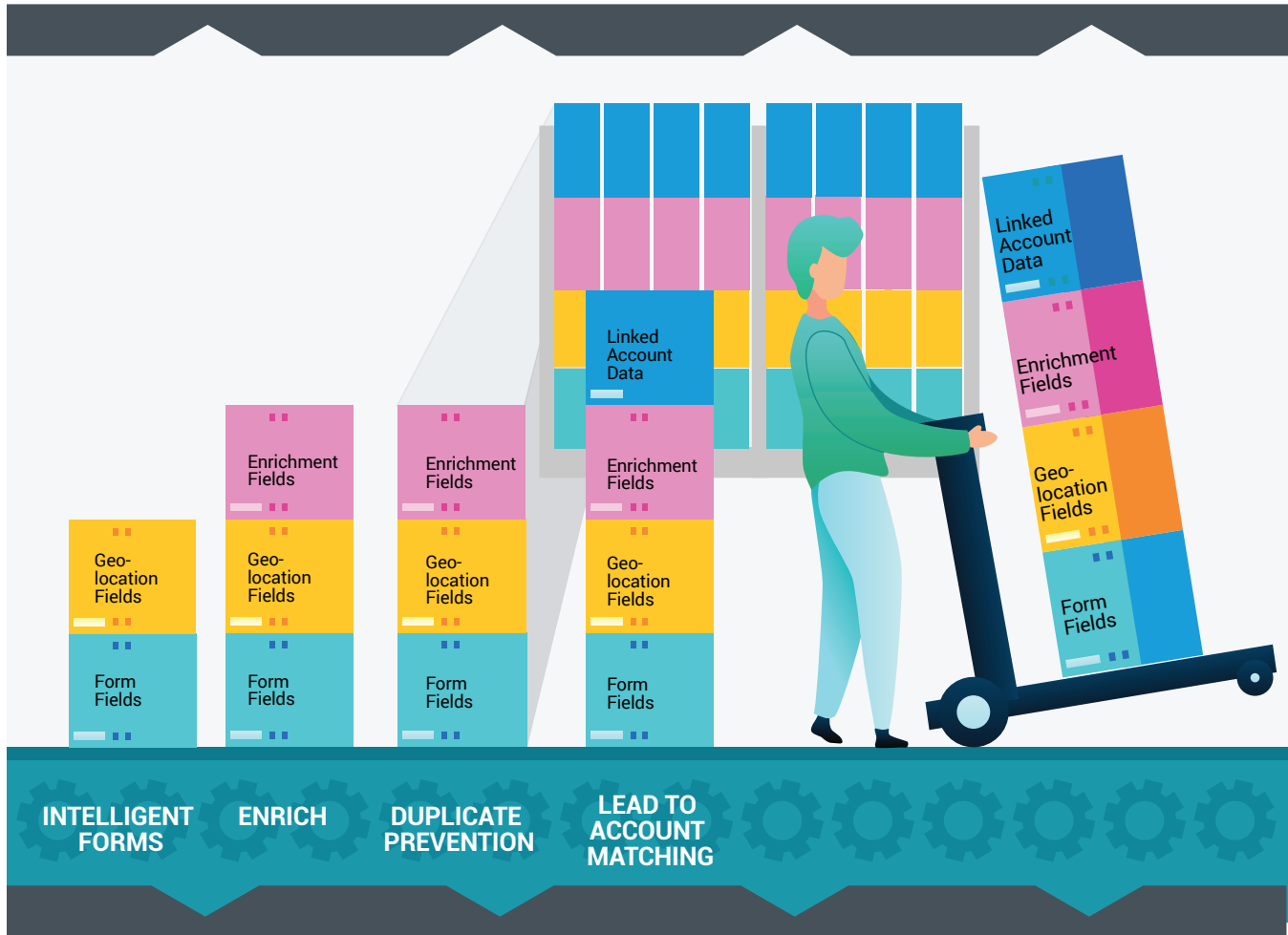
RINGLEAD PRODUCT SYNERGY

Experience frictionless product synergy with RingLead Data Operations Platform. Our suite of data quality solutions positions your team for success, sending your leads through a series of data operations before it ever reaches a sales rep. We ensure your lead is cleansed, normalized, enhanced, and segmented, all in the appropriate order of operations, before routing it to your team.

Experience product synergy at its finest with RingLead suite of intelligent data solutions. Your leads will be routed more precisely, more timely and more efficiently than any other lead routing tool on the market when using our suite of data processing tools because all leads will be normalized, deduped, and enriched.

ROUTING USE CASES

Painlessly configure round robin groups aligned with your sales strategy to auto-assign leads to the right owner for optimum, timely engagement. RingLead rules offer complete, virtually limitless control over how your leads enter your CRM and MAS.

Popular use cases for Routing include:

- Assigning West Coast Leads to the West Coast Round Robin workflow

- Matching a new Lead to an existing, high revenue Account and assigning. the Lead to the Account Owner (or the Owner's BDR)

- Changing the Owner of a Lead who submitted a Contact Us form if the Lead is Owned by a Queue

- Creating a new Lead and linking it to the proper Account if the matching Account is an existing Prospect, then changing the Lead Priority to High.

- Matching a new Lead to an Account and if the Account is a customer, then converting the Lead to a Contact and changing the Contact Owner to the Account Owner.

- Setting up multiple Round Robin rules that are not dependent on configuring a Salesforce custom formula field every time the number of people needed to be in the round robin changes.

- Ensuring that new leads of different quality and sources are assigned evenly, and that owners don't get a disproportionate number of quality leads from a particular source, through multiple round robin rules.