

UPDATES on Round Robin for HyperDrive CRM Pro

Last Modified on 01/27/2023 10:44 am CST

Round Robin leads are a great way for businesses to distribute leads among their sales team in a fair and efficient manner.

Using the Round Robin action set to automatically assign leads is certainly helpful to increase productivity, improve team morale, and provide better customer service for a lot of HyperDrive users.

We made new updates for the Round Robin action set that brings a host of new features and improvements to the user experience. Round robin no longer assigns new sales people if someone is assigned here is what happens.

Step 1 - Someone logs a lead.

JASON BRETHORST Edit Contact

missing
MODESTO, CA 95351 Map
(414) 467-6624
Upload Photo

Lead - ID: **A50918F4-BE46-4497-99D9-D3FE3AB9E928**
Trade or Buy: **BUY**
Deal - Make: **HARLEY-DAVIDSON**
Deal - Color: **missing**

Deal - Value: **missing**
Deal - Stock Number: **missing**
Deal - Model: **PAN AMERICA 1250**
Deal - Odometer: **missing**

Deal Stage: **0 - New Lead Entry**
Deal Owner: **Lou Ilac (SKULLY)**
Deal Status: **ACTIVE**

No referrals
Assigned To: **Me**

Lead Type: **More Than Rewards Live Leads**
Deal - VIN: **missing**
Deal - Year: **2023**
Deal - New or Used: **USED**

Flags...

Pinned Notes
1/25/2023 - LIVE LEAD DATE: 1/25/2023 3:37:06 AM

Notes (4)
Add Note

Date	Note	Entered By
1/25/2023 1:37 AM	[[System]][[Icon:Text]] ROUND ROBIN AUTOMATIC LEAD ASSIGNMENT The following status action "ROUND ROBIN - LEAD ASSIGN" was fired off on 01/25/2023. This triggered a Round Robin Lead Assignment to Lou Ilac (SKULLY). A "to do" follow-up was also automatically created and assigned	Lou Ilac (SKULLY)
1/25/2023 1:37 AM	LIVE LEAD DATE: 1/25/2023 3:37:06 AM	Mitchell's Modesto H-D
1/25/2023 1:37 AM	**AUTOMATED ALERT** Chg Status to New Lead Entry (note added by Action Set)	Mitchell's Modesto H-D
1/25/2023 1:37 AM	Contact added via API	Mitchell's Modesto H-D

Step 2 - If the lead is already assigned, it will just put this note instead and does not change the assignment.

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Contact Details

(Actions...)
(Recent Contacts)
Add Contact

JASON BRETHORST

missing
MODESTO, CA 95351 Map
(414) 467-6624
Upload Photo

Lead - ID: **AB528156-1CEB-48B8-B7CE-579B8C38B4CC**

Trade or Buy: **BUY**

Deal - Make: **HARLEY-DAVIDSON**

Deal - Color: **missing**

JASON@MORETHANREWARDS.COM

Deal - Value: **missing**

Deal - Stock Number: **missing**

Deal - Model: **PAN AMERICA 1250**

Deal - Odometer: **missing**

Deal Stage
0 - New Lead Entry

Deal Status
ACTIVE

Lead Type: **More Than Rewards Live Leads**

Deal - VIN: **missing**

Deal - Year: **2023**

Deal - New or Used: **USED**

No referrals

Assigned To: **Me**

Flags...

Pinned Notes

1/25/2023 - [[System]] This person has made multiple requests via your website, it's already assigned to LOU ILAC (SKULLY), so it will NOT be reassigned via Round Robin.

1/25/2023 - LIVE LEAD DATE: 1/25/2023 3:39:36 AM

1/25/2023 - LIVE LEAD DATE: 1/25/2023 3:37:06 AM

Notes 7

To-Do List 2

Appointments

Attachments

Autoresponders

Special Events

Related

Referrals

Date	Note	Entered By
1/25/2023 1:39 AM	This person has made multiple requests via your website, it's already assigned to LOU ILAC (SKULLY), so it will NOT be reassigned via Round Robin.	
1/25/2023 1:39 AM	LIVE LEAD DATE: 1/25/2023 3:39:36 AM	Mitchell's Modesto H-D
1/25/2023 1:39 AM	**AUTOMATED ALERT** Chg Status to New Lead Entry (note added by Action Set)	Mitchell's Modesto H-D
1/25/2023 1:37 AM	[[System]][[Icon:Text]] ROUND ROBIN AUTOMATIC LEAD ASSIGNMENT	

Notice now it is not assigned to anyone yet but previously it was

Notice how the lead does not get reassigned instead it loads this note telling you they made multiple request.

Users can now enjoy a more efficient experience while also benefiting from the new features. The development team is committed to continuously improving the application and providing the best experience for its users.

With the help of this method, businesses can make the most out of their sales team and achieve better results.