



SUNDOG

## Territory Lead Routing for AppExchange

Territory Lead Routing customizes lead routing to match your sales process and team structure. New leads are assigned automatically without manual entry or confusion. A one-time setup process establishes territories, zip/postal codes, states, countries and a default salesperson. Customize lead e-mails with your reply address, sender name, message header and footer, and subject line. Streamline your lead routing and keep your sales team focused on pursuing leads.

### Installation

1. Set up PRM with at least one active PRM user.
2. Install Territory Lead Routing from the AppExchange.
3. Configure settings in the Territory Lead Routing Options tab.
4. Add the “Default Salesperson” checkbox to your Contact page layout.
5. Add the “Use Automatic Lead Assignment” checkbox to your Lead page layout.
6. Add the following three related lists to the Account page layout:
  - a. Partner Territories
  - b. Partner State Mappings
  - c. Partner Country Mappings

### Initial Setup

1. Add territories to the Partner Territories:
  - a. A territory will be assigned to one and only one Account.
  - b. An account may have multiple territories assigned to it.
  - c. Territories consist of one or more postal codes.
  - d. Create territories to match your sales process and structure.
2. Add zip codes to the Partner Zip Code Mappings:
  - a. Each zip code will be assigned to one and only one Territory.
  - b. Use the Data Loader to quickly and easily load a large number of zip codes.
3. Add state to the Partner State Mappings:
  - a. Each state will map to one and only one Account.
  - b. Leads containing the state/province or the state/province abbreviation will be mapped to the Account owning that state or abbreviation.
4. Add country to the Partner Country Mappings:
  - a. Each country will map to one and only one Account.
  - b. Leads containing the country or the country abbreviation will be mapped to the Account owning that country or abbreviation.

5. Choose a “Default Salesperson” for each PRM account:
  - a. Go to the account record for the PRM account where leads will be routed.
  - b. Choose the contact associated with the account that should initially receive the leads.
  - c. Check the “Default Salesperson” checkbox to assign selected contact as default.
  - d. Notes:
    - i. Only one contact may have the “Default Salesperson” checkbox checked per account.
    - ii. The contact does not require a PRM account. If the Default Salesperson contact is not a PRM user, the lead will be routed to the Default Lead Owner from the Territory Lead Routing Options screen. In addition, the contact will be notified via email regarding the lead in their territory.

### Automatic Assignment (Salesforce Interface)

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1. Create a new lead with any pertinent information.
2. Check the “Use Automatic Lead Assignment” checkbox.
3. Save the lead.
4. The correct user will become the Lead Owner automatically and an email will be sent to notify them of the new lead.

### Automatic Assignment (Web-to-Lead Form)

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1. Create a new Web-To-Lead form:
  - a. Include all the fields you would like to add to the form. Also include the “Use Automatic Lead Assignment” and “Lead From Web” fields.
  - b. Add formatting to the form. Change the two fields above into hidden fields on the form with a value of “1”. Salesforce will interpret these values as checked when the form is submitted.
  - c. Add the new form to your website.
2. As users submit the form, leads will be automatically assigned and users will be notified.

### About Sundog

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Sundog is a marketing and technology company dedicated to providing end-to-end services that deliver an excellent short- and long-term return on investment. Sundog can help you realize the potential of your sales/marketing pipeline with the power of the Salesforce.com solution. As a result, your company can easily track, analyze, and report your marketing activities, as well as maximize your efforts at every step of the business development cycle.

