

Enhancements to your Knowde Storefront: Lead & Request Routing

Lead & Request Routing is the latest self-service tool available on Knowde. Now, producers can assign specific team members to receive Leads & Requests based on product type, request type, buyer company, and more! Save time by creating custom rules and ensure that no customer requests are left unattended again.

Launching August 2021.

New & Enhanced Features

01 Create an Assignment

Choose a Lead or Request type and assign it to your salesperson of choice.

02 Choose Attributes

Create specific and detailed Assignments by choosing Buyer or Product attributes. Make sure your representatives only receive Assignments relevant to their role.

03 Customize with Conditions

You can now combine Attributes using And/Or conditions to create a more targeted set of leads to route to your representatives.

04 Assign representatives as Experts

Automatically give a representative Expert status on your storefront when creating an Assignment.

05 Route to a Default Inbox

Send non-assigned or miscellaneous Requests and Leads to a default inbox.

Don't have a designated salesperson for every request type? No worries—use our Default Inbox feature to send all non-assigned Leads & Requests to your shared inbox. Make sure no Leads & Requests are left behind!



New Assignment

Cancel
Create

Assignment Name

Assignment Type

Leads

Document Requests

Sample Requests

RFQs

Orders

Assignment Rules Assign all

Select Attribute ▾

If

Add Condition ⊕

Assign to

BUYERS

- Company
- Role

PRODUCT

- Product
- Brand
- Market
- Technology