Assigning Contacts Captured Through Routing Forms to Users

This guide explains how to assign contacts captured via Routing Forms to specific users. By following these steps, you can ensure your contacts are distributed efficiently and accurately to the right team members.

How to Assign Contact Captured Through Routing Forms to Users

Follow the steps below to assign new Contacts captured in your Routing Forms to Users:

Navigating to the Settings Tab

1. Click on **Routing Forms** in the left-hand navigation menu.
2. Select the form you want to assign Contacts in.
3. Click on the **Settings** tab at the top.

Assigning the Contact

New contacts can be assigned to users in two ways:

- **Round-robin distribution:** Select users from the dropdown menu for this assignment method.
- **Assign to meeting host:** Check the **Assign new contact to the meeting host** box to assign contacts to the host they scheduled a meeting with via the Routing Form, overriding the round-robin method.