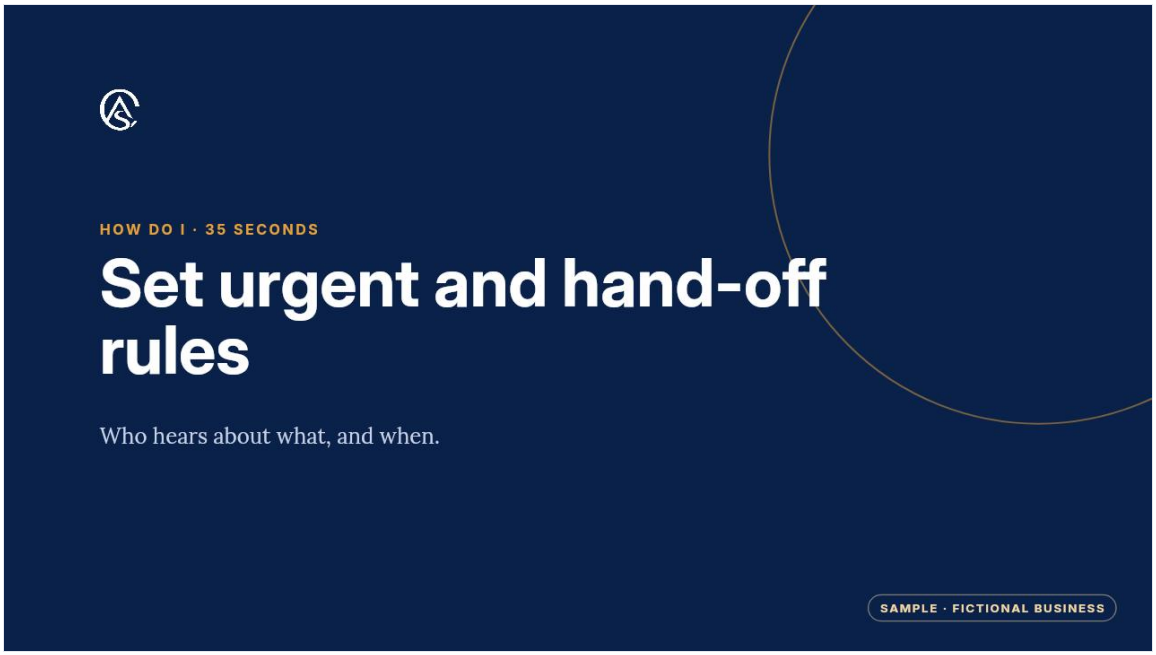
NEVER MISS A LEAD · HOW DO I

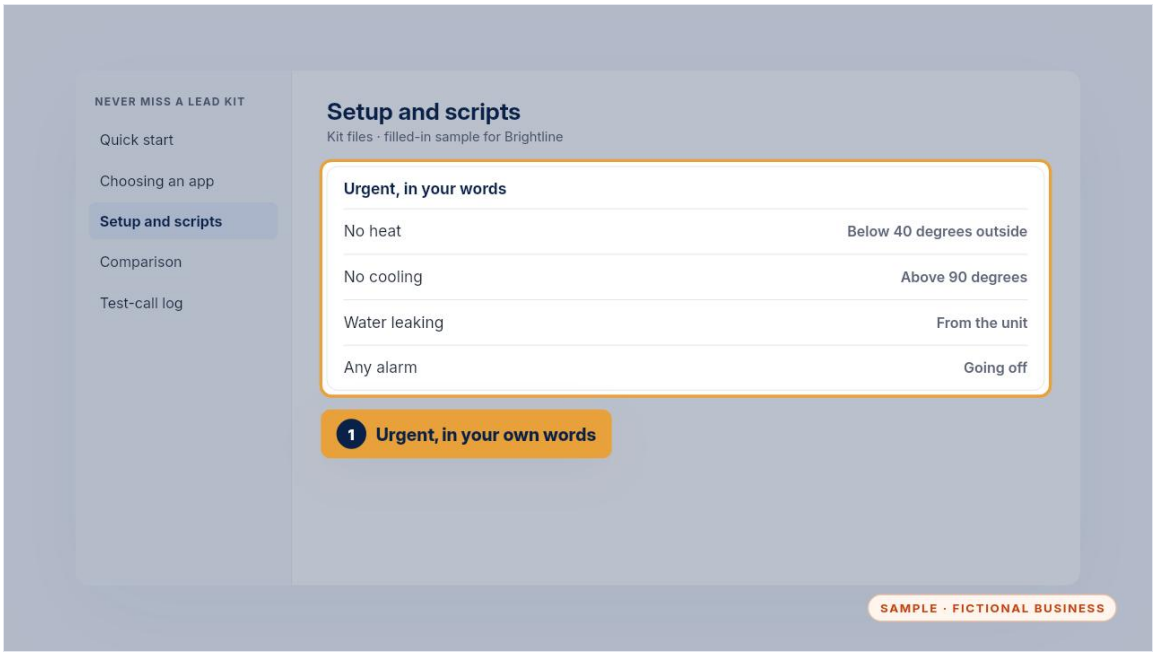
How do I set what counts as urgent?

Urgent rules, hand-off rules and where summaries go.

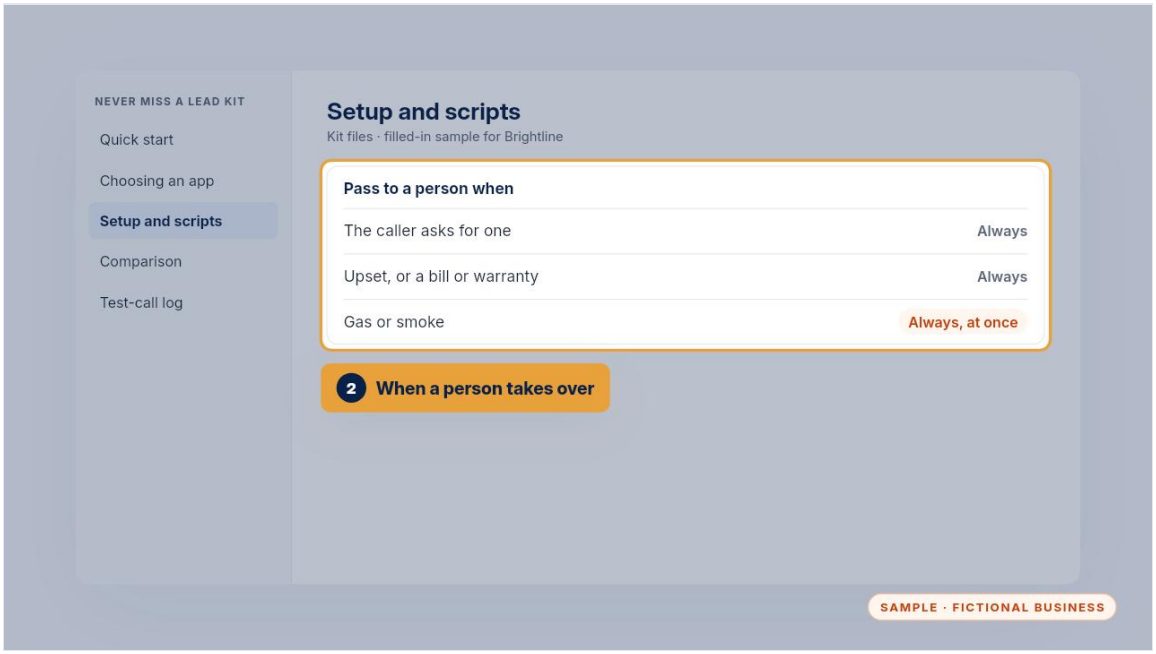
Watch the narrated video: https://openarmsolutions.com/guides/never-miss-a-lead/set-urgent-and-hand-off-rules



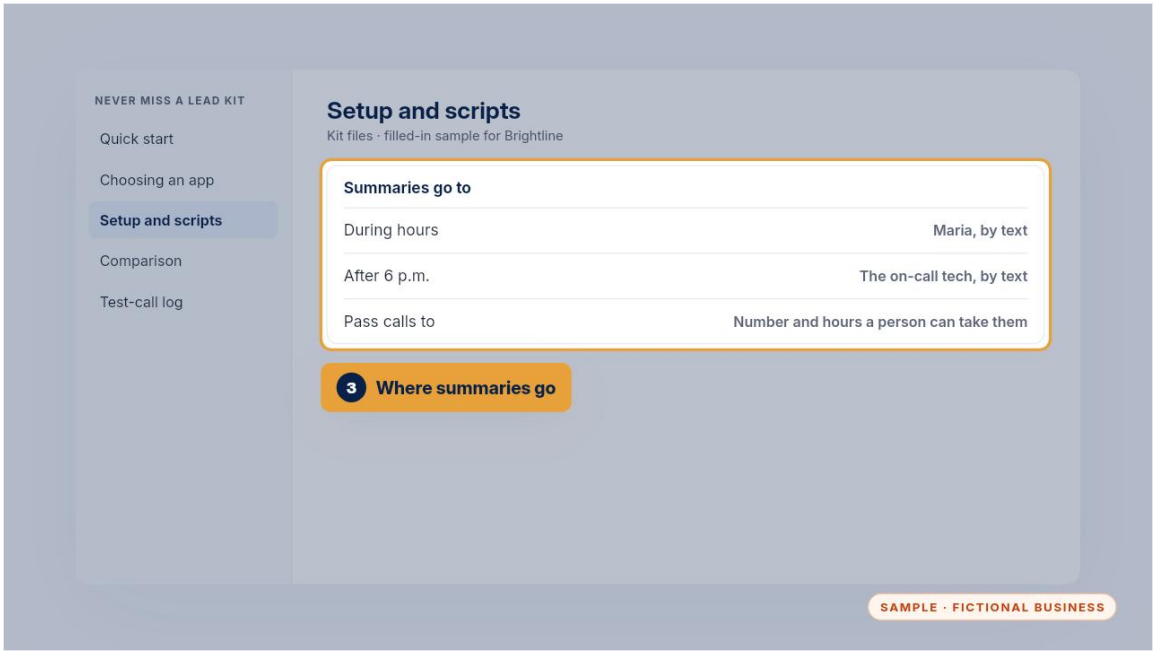
1 These rules decide which calls reach a person right away.



2 Write what's urgent in your own words. For Brightline, that's no heat below forty degrees, no cooling above ninety, water leaking from the unit, or any alarm.



3 Then say when a call goes to a person: when they ask, when they're upset, when it's about a bill or a warranty, and anything about gas or smoke.



4 Last, set where summaries go and the number calls pass to. Brightline sends them to Maria by day and to the on-call tech after six.