



Smart Call Routing Quick-Start Guide

PM CONSULTING AI NEWS • WEEKLY INTELLIGENCE

- 1** List out every team member who could answer leads (5 min)
- 2** Log into HighLevel and find Number Pools (3 min)
- 3** Click into your main inbound number pool (2 min)
- 4** Enable 'Ring Incoming Call to selected Users' (2 min)
- 5** Select up to 6 users to ring for each call (3 min)
- 6** Have each user set their preferred device in HighLevel (5 min)
- 7** Test by calling your main line and confirm all devices ring (5 min)
- 8** Check the call log after 1 day for missed vs. answered (3 min)
- 9** Adjust user selections or ring order as needed (4 min)
- 10** Print this checklist and keep it at your front desk (1 min)