

Withdraw

Overview

The **Withdraw** settings control when leads are automatically taken back from a salesman due to inactivity. Withdrawn leads move to **Lead Stock** and can be reassigned.

SALES SETTINGS

[Add Lead & Duplication](#) [State Action](#) [Notifications](#) [Rotation](#) [Withdraw](#) [CIL](#)

Withdraw Leads ON

Working days:

Working hours:

Withdraw By Call Center OFF

Fresh Leads (in hours)

Withdraw Planned-Meeting

Withdraw Pending

Withdraw Unreachable

Withdraw After Meeting

Withdraw low budget

Withdraw Following

Withdraw Meeting

Exceptions Lead IDs

Exceptions Sources

Withdraw Ticket OFF

Remove Ticket Assign After (in hours)

Main Switch

Setting	Description
Withdraw Leads	Master ON/OFF switch for the entire withdraw feature.
Working Days	Which days of the week the withdraw rules apply (e.g., Sunday–Thursday).
Working Hours	The time window during which withdraw rules are active (e.g., 11:00 AM – 10:00 PM).

Withdraw Settings

Setting	Description
Withdraw by Call Center	When ON, allows the call center team to manually withdraw leads from salesmen.
Fresh Leads (in hours)	How long a lead can sit in Fresh Leads without action before being withdrawn.

Withdraw by State

Set specific withdrawal timeframes per lead state. Leave blank to disable withdrawal for that state.

“ Only states that have a **Next Action Date** set will appear here. States without a next action date will not show up in this section.

“ Only states that have a **Next Action Date** set will appear here. States without a next action date will not show up in this list.

State	Setting
Planned Meeting	Hours of inactivity before withdrawal.
Pending	Hours of inactivity before withdrawal.
Unreachable	Hours of inactivity before withdrawal.
After Meeting	Hours of inactivity before withdrawal.
Low Budget	Hours of inactivity before withdrawal.
Following	Hours of inactivity before withdrawal.
Meeting	Hours of inactivity before withdrawal.

Exceptions

Setting	Description
Exceptions Lead IDs	Leads with these Lead IDs will not be withdrawn, even if inactive.
Exceptions Sources	Leads from these sources will not be withdrawn automatically.

Ticket-Related Withdraw

Setting	Description
Withdraw Ticket	When ON, leads associated with a support ticket can be withdrawn.
Remove Ticket Assignment After (hours)	How long before the ticket assignment is removed automatically.

How Withdraw Works with Delay Notifications

The system follows this sequence:

1. Lead becomes inactive (no action taken).
2. **Delay notifications** start firing — alerting the salesman and manager (configured in Notifications Settings).
3. Once the withdraw timer expires, the lead is **automatically withdrawn** and moved to Lead Stock.

“ Set your **delay hours** to be less than your **withdraw hours** so the salesman gets a warning before the lead is taken away.

Key Things to Know

- Withdrawn leads move to **Lead Stock** — they are not deleted.

- From Lead Stock, they can be reassigned manually or via Rotation.
- Withdraw rules only apply during the configured **working days and hours**.
- Use **Exceptions** to protect important lead sources or campaigns from being auto-withdrawn.

Created 2026-06-24 09:13:20 UTC by Admin

Updated 2026-06-28 08:09:36 UTC by Admin