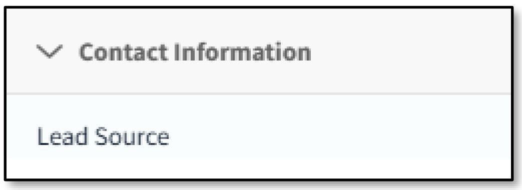
Filter Options for Contact Sources

When you create saved lists or pipeline views in Total Expert's contact list, you may want to filter based on the origin of the contacts. In this case, you have multiple options based on where your data originated from.

- **Lead Source** – This is located in the Contact Information section of the filter panel.
    - This uses the Lead Source field on the contact record, which is populated automatically when the contact record is created by a Total Expert tool (single property site or lead capture app) or by an integrated service, such as a loan origination system (LOS).
        - This field can also be edited manually in Total Expert.
    - Selections in this field are limited to the sources configured on the Lead Sources page (**Leads & Contacts → Lead Management → Lead Sources (Contacts)**), so the filter selections are also limited.



- **Referral Source** – This is located in the Mortgage Information section of the filter panel.
    - This uses the Referral Source field on a loan record, which is populated automatically by an integration with an LOS.
        - This field can also be edited manually in Total Expert.
    - This field uses free-form text entry. The filter selections are limited to the saved referral sources for any loans you have access to.
- **Source** – This is also located in the Mortgage Information section of the filter panel.
    - This field is exclusively populated by your LOS and cannot be edited manually in Total Expert.
    - When you select this option to filter with, you must enter an exact match. Because values are populated from your LOS, you must check with there for the possible values.