



# Inbound Call Campaign for Administrators

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## Introduction

### Note

This is a paid feature. All the following information regarding inbound call campaigns is part of the communications package. Please reach out to your Implementation Manager or your Customer Success Manager for more information on how to set up your communications package.

Inbound call campaigns allows for administrators to publish organizational phone numbers. Customers who dial these numbers are linked to active Total Expert dialer loan officers on an associated team. The first loan officer to accept the call is presented to enter the leads' details and is then ultimately assigned the lead.

Name	Description
Inbound call campaign	Captures leads who call a unique and designated phone number.
Total Expert dialer	Pop-up box that allows you to make and receive calls.

## Prerequisites

The following are needed in order for the inbound call campaign to function:

- Communication package is purchased.
- Total Expert soft phone is enabled as the preferred dialer for end users.
- Twilio numbers are generated for loan officers (see below for more information).

- TCPA disclaimers are accepted for each loan officer (see below for more information).

## Teams

Inbound leads can only be distributed to a team. Users of a team Teams are created in **Organization Admin > Teams**.

### How to Create New Teams

1. On the left navigation, click **Organization Admin > Teams**.
2. Click **Add Team**.
3. Input a team name then click **Save Team**.
4. Click **Add Users**.
5. Use the search bar to quickly find your user(s).
  - Search by name or email.
6. Check the box next to each user then click **Add Users**.
7. Use the Manager toggle switch to indicate which user(s) should be managers of the team.
  - This allows the user to access reporting for the team as well as allow them to login to team members' accounts.
  - The user must have the appropriate user permissions in order for them to login to team members' accounts.

## Generate Numbers

### Tip

It is best practice to generate the phone numbers of your team members before you create your workflow (see below). Some team members may already have numbers generated for their accounts, but you should double-check before adding your team(s) to your workflow.

You must generate Twilio-specific phone numbers for users that belong to the designated teams to accept inbound leads.

### How to Generate Numbers

1. On the left navigation, click **Leads & Contacts > Lead Management > Lead Settings**.
2. Under *Phone Settings*, click **Edit**.
3. Use the search bar to find specific users.
  - Search by first name and/or last name.
4. Check the box next to the users' names. You can generate numbers for multiple users at once.
5. Click **Generate Numbers**.
  - A pop-up box appears.
6. Check the box next to the appropriate area code preference:
  - **Match Cell Phone Area Code**
  - **Company Defined** – Allows you to create your own area code. If selected, input your three digit area code.
7. Click **Generate Numbers** when complete.

8. A soft phone number appears under that contact when in **Phone Settings**.

Generate Phone Numbers

Provide Twilio phone numbers for calling and texting.

Area Code:

Match Cell Phone Area Code

Company Defined

952

1  
Users

Cancel Generate Numbers

## Workflow

Creating workflows are needed to configure and funnel new inbound leads to the proper users under the teams you select.

### How to Create a New Workflow

1. On the left navigation, click **Leads & Contacts > Lead Management > Workflows**.
2. At the top of the page, click **Create Workflow**.
  - A pop-up box appears.
3. Input and choose the following:
  - **Display Name**
  - **Product Category**
4. Click **Next** to continue.
5. Under *Where will your workflow start?*, check **Inbound Phone Campaign**.
6. Choose a toll free phone number.
  - This is the number that your customers call when getting in touch with a loan officer.
7. Click **Next** to continue.
8. Input the following:
  - **Team(s)** – Users on this team accept the incoming phone call of the lead.
  - **Exception Handling** – The individual team member that receives the lead if no loan officer is available to pick up the incoming call.
9. Click **Next** to continue.
10. Input and update pre-existing contact rules.
  - Pre-existing leads and contacts are already in your Total Expert platform. Separate leads and contacts are created if you do not choose to update any information on existing records.
  - Toggle the switch to check what information should be updated for pre-existing leads, contacts, and contacts marked as “Do-not-contact.”
11. Click **Submit** when finished.



### Create Workflow

Identify lead source for your new workflow

Where will your workflow start? \*

3rd Party Lead Source

Inbound Phone Campaign NEW What is this?

Select an option for your phone campaign number? \*

The phone number is for receiving inbound calls only

Toll free (888) number

Toll free (866) number

Use a preferred area code

### Create Workflow

Define routing actions for leads in this flow

Route to: \*

Team(s)  Individual

Exception Handling: \*

If a lead cannot be assigned:

Workflow  Individual

**Note**  
Once created, the workflow is live and can be accessed under **Leads & Contacts > Lead Management > Workflows**.



## How to Edit My Workflows

1. On the left navigation, click **Leads & Contacts > Lead Management > Workflows**.
2. Search for the workflow that you would like to edit.
3. On the right side of the page, click **Actions > Edit**.
  - A slide-out screen appears.
4. Click on the down arrows to view workflow information.
5. Make your edits then click **Submit** when finished.

Edit Alex Test ICC

View workflow canvas

> Details

> Source

∨ Routing Actions

**Route to:**

Team(s)  Individual

Alex Test ICC X

**Exception Handling:**

If a lead cannot be assigned:

Workflow  Individual

Mitchell

> Lead & Contact Rules

Submit

## Viewing Workflows

Once you have completed your workflow (see above), you are able to view the flow yourself.

## How to View Workflows

1. On the left navigation, click **Leads & Contacts > Lead Management > Workflows**.
  - **Note:** Under the *Lead Source* column, find the flow with the phone number as the source. These are the inbound call campaigns.
2. On the right side of the page, click **Actions > View Workflow**.
  - A new page appears.
3. (Optional) On the right side of the page, click the **gear icon**.
  - Click **Edit** to update your flow.
  - If updates are made, click **Save**.