



Call Transcription

Introduction

Total Expert users who use the built-in dialer function to call their leads directly from the platform can review a record of their past calls. Both audio recordings and text transcriptions are available. These features allow you to store a record of past interactions with your leads in the platform automatically. You can then use the record to review a past interaction in advance of an upcoming call or meeting.

Note

Transcription is only available to organizations who use the recording service. If an organization is using this, all calls are recorded and transcribed. However, these can be hidden from the platform for users with certain roles.

Using the Dialer

You can activate the built-in dialer from a lead details page, contact details page, or from the header bar of any page in the platform. To ensure the recording is properly associated with a saved lead, use the lead details page.

1. Navigate to **Leads & Contacts → Lead Management → Leads**.
2. On the lead list page, locate the lead whose call you want to review and click their first name. A slide-out panel with a summary of the lead appears.
3. Click the lead's name at the top of the slide-out panel. The lead details page opens.
4. Click the **Call** button in the upper-right corner of the page. The dialer opens in a new window with the lead's phone number populated.
5. Click the **Call** button in the dialer. A recorded message is played to inform the call recipient that the call may be recorded.
6. Complete the call and click the **End Call** button in the dialer.

Viewing a Transcription

The recording and transcription are available on the lead details page. If you are not already on this page:

1. Navigate to **Leads & Contacts → Lead Management → Leads**.
2. On the lead list page, locate the lead whose call you want to review and click their first name. A slide-out panel with a summary of the lead appears.
3. Click the lead's name at the top of the slide-out panel. The lead details page opens.
4. On the lead details page, click the **Activity** tab if it is not already selected.
5. In the list on the left side, locate the call you want to review and click it.

Tip

In the **Type** filter, select **Phone Calls** to filter the list to show only calls. Use the **Sort By** option to further help locate the call you are looking for.

6. The details for the call you selected in the left column are shown in the next column.



- a. The recording is available to listen to as soon as the call ends. Use the playback controls to listen to any part of the call.
- b. When the transcription is ready, its full text appears in the area below the recording.

Warning

While Total Expert has vetted their transcription service provider, no service can guarantee 100% accuracy in this area. If something seems to have been transcribed incorrectly, review the audio recording to verify what was said.

Note

The recording of the call is sent to a third-party service to create the transcription. It may be a few minutes before the transcription is ready to view. If the transcription is not showing yet, try refreshing the page in a few minutes.

The service identifies the voices on the call as Speaker 1 and Speaker 2 according to who spoke first at the beginning of the call. These labels cannot be updated in Total Expert.