Preferred Dialer for End Users

Introduction

The Preferred Dialer function allows you to choose and set a default phone number in your Total Expert profile that is regularly used to call leads. This preferred number is used for both outbound calls as well as inbound calls from a lead. The lead that receives the call is always shown the Total Expert Dialer number and not your personal cell, home, or office number.
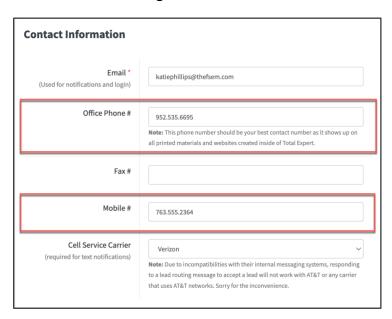
Setup and Configuration

In order for you to choose a preferred number, you first must have both your office phone number and your mobile phone number added to your contact information.

How to Add Your Numbers to Your Contact Information

1. In the top navigation bar, click your **account name > Account Settings**.
2. Under *Contact Information*, input the following:
   - Office Phone #
   - Mobile #
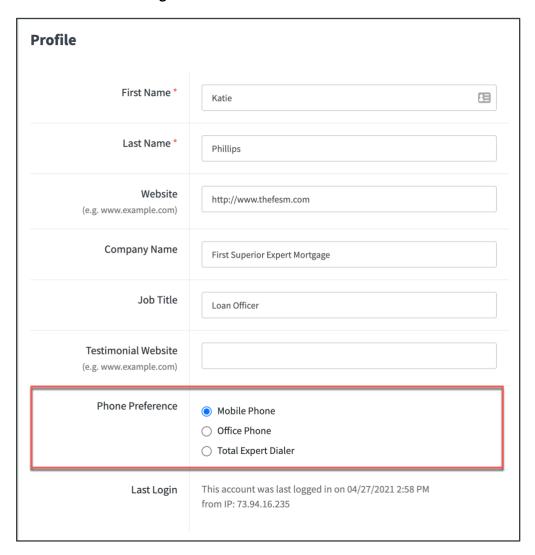3. Click **Save Changes** when done.

How to Choose Your Preferred Dialer Number

Note

Your organization may limit the information that you can update in your account settings. Please reach out to your organization if you do not have access to update your profile settings.

1. In the top navigation bar, click your **account name > Account Settings**.
2. Under *Profile*, scroll down until you see Phone Preference.
3. Choose one of the following options:
    - Mobile Phone
    - Office Phone
    - Total Expert Dialer
4. Click **Save Changes** when done.

Profile

First Name *	Katie
Last Name *	Phillips
Website (e.g. www.example.com)	http://www.thefesm.com
Company Name	First Superior Expert Mortgage
Job Title	Loan Officer
Testimonial Website (e.g. www.example.com)	
Phone Preference	◉ Mobile Phone ◯ Office Phone ◯ Total Expert Dialer
Last Login	This account was last logged in on 04/27/2021 2:58 PM from IP: 73.94.16.235

Dialer

Once the preferred number has been chosen, the Communications Package Dialer feature shows the phone number as the default. You can change this number in the dialer as well. Changing the number in the dialer does not adjust the preferred default number in your profile settings.