



# Preferred Dialer for End Users

## Introduction

### Note

This feature is part of the add on Communications Package feature. Please reach out to your Implementation Manager or Customer Success Manager for more information.

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

### 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 *Contact Information*, input the following:
  - Office Phone #
  - Mobile #
3. Click **Save Changes** when done.

Contact Information	
Email * <small>(Used for notifications and login)</small>	<input type="text" value="katiephillips@thefsem.com"/>
Office Phone #	<input type="text" value="952.535.6695"/> <small>Note: This phone number should be your best contact number as it shows up on all printed materials and websites created inside of Total Expert.</small>
Fax #	<input type="text"/>
Mobile #	<input type="text" value="763.555.2364"/>
Cell Service Carrier <small>(required for text notifications)</small>	<input type="text" value="Verizon"/> <small>Note: Due to incompatibilities with their internal messaging systems, responding to a lead routing message to accept a lead will not work with AT&amp;T or any carrier that uses AT&amp;T networks. Sorry for the inconvenience.</small>



# 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 *	<input type="text" value="Katie"/>
Last Name *	<input type="text" value="Phillips"/>
Website <small>(e.g. www.example.com)</small>	<input type="text" value="http://www.thefesm.com"/>
Company Name	<input type="text" value="First Superior Expert Mortgage"/>
Job Title	<input type="text" value="Loan Officer"/>
Testimonial Website <small>(e.g. www.example.com)</small>	<input type="text"/>
Phone Preference	<input checked="" type="radio"/> Mobile Phone <input type="radio"/> Office Phone <input type="radio"/> 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.

