



# Agent Phone Number and Call Recording

Integrity provides a unique Agent Phone Number to each agent. Any incoming calls to the Agent Phone Number will automatically be recorded. Outbound calls made through the Contact record will also be recorded. Recorded calls are useful for compliance, reviewing important information from the call, sales training, and creating call summaries and transcripts.

## Agent Phone Number

Go to the Account page (under the agent's name in the top right) and find the Agent Phone Number section. It will show the agent's Agent Phone Number.

The Agent Phone Number is created when the agent logs in to Integrity for the first time. It's created based on the phone number the agent entered at registration. Integrity tries to create a number in the same area code. If no phone number is available at the time for the area code, a nearby area code will be used.

If the agent registered with a toll-free number, an Agent Phone Number will not be created and the agent will need to contact support.

## Recording Incoming Calls

The caller will hear a pre-recorded message letting them know they will be connected to the agent and that the call is being recorded for quality and training purposes.

The agent can choose any phone number to forward the call to and can change that phone number at any time on the Account page, in the Availability Preferences section. The device for that phone number will ring when there's an incoming call. The agent will answer the call to be connected to the caller.

### Agent Phone Number

This phone number can be given to clients for them to contact you directly. It will be forwarded to the number found in your Check-in Preferences.

**524-888-5645**

### Agent Website

Send your personalized link to the client to get them started with shopping for plans. Don't worry, you will get credit if the consumer enrolls in any of these plans.

Copy Link 

### Availability Preferences

Calls to your Agent Phone Number will be forwarded to the number below.

Forward Calls to: [Edit](#) 

 435-555-8989

#### Lead Source

 Health [Set Up](#) 

Include LeadCENTER Health Leads when "I'm Available."

 Life [Configure](#) 

Include LeadCENTER Life Leads when "I'm Available."

PlanEnroll Agent Site

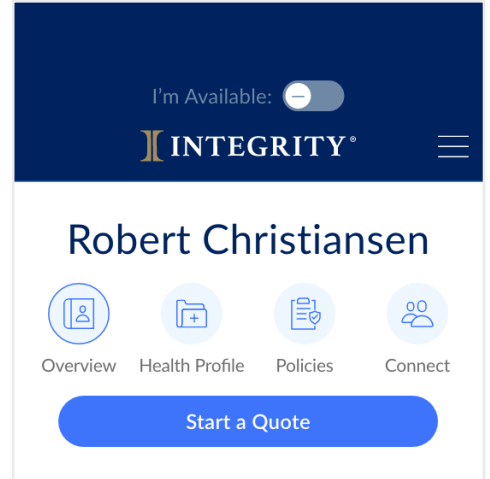
Show on PlanEnroll Agent website when "I'm Available."



# Agent Phone Number and Call Recording

## Recording Outgoing Calls

To place a recorded call to a Contact, go to the Contact Details page for that Contact and click Connect, then click Call. The device selected for call forwarding will ring. Answer the call, then wait for the Contact to answer their phone. The Contact will see the agent's name on Caller ID, and when they answer they'll hear a pre-recorded message letting them know they will be connected to the agent and that the call is being recorded for quality and training purposes



## Finding Call Recordings

Once a call ends, the call recording can be found in the Contact Details, in the Overview screen. Scroll down to the Activity section to find the call. The recording can be downloaded for review, but it's important to protect any Personal Health Information (PHI) in the recording, so it's recommended to delete the recording after reviewing it. There's no limit to the number of times a recording can be downloaded.

