

Integrate Twilio Call

What is Twilio Call (Smart Call)?

Smart Call allows Realtors to call leads directly from AgentRoof CRM using their Twilio number. When a Realtor initiates a Smart Call, the system first calls the Realtor's own phone. Once the Realtor answers, AgentRoof automatically connects the call to the lead's phone number — allowing both parties to speak directly. The entire call is also recorded for future reference.

Log In to AgentRoof CRM

1. Go to the AgentRoof CRM login page.
2. Enter your registered email and password.
3. Click **Login**.

You will be redirected to the Dashboard.

Access the Leads Page

1. Navigate to the left-hand menu.
2. Click **CRM**.
3. Select **Leads**.

The Leads list will be displayed, showing all leads with their Name, Email, Phone, Created On date, Notes, and Stage.

Initiate a Smart Call

1. Locate the lead you want to call from the Leads list.
2. Click the **phone icon** next to the lead's phone number.

A tooltip labelled **Smart Call** will appear over the phone icon, confirming the call type.

Answer the Call on Your Phone

Once Smart Call is initiated:

1. A pop-up will appear on screen with the message "**Calling your phone...**", along with the instruction "**Answer your phone to be connected with the lead**".

2. The pop-up also displays the lead's name and phone number (e.g., *Sonu* - +13438602316) for confirmation.
3. Answer the incoming call on your own registered phone number.

Note You can click **Hide** on the pop-up to dismiss it from view without ending the call process.

Connect with the Lead

1. After you answer the call on your phone, AgentRoof CRM automatically places a call to the lead's phone number.
2. Once the lead answers, both you and the lead are connected on the same call, and the conversation can begin.

Other Ways to Initiate a Smart Call

In addition to the phone icon on the Leads list, you can start a Smart Call from within a lead's detail page:

From the Lead's Timeline

1. Open the lead's detail page.
2. Under the **Timeline** tab, click the **ALL** option.
3. Hover over any call entry to reveal the action icons.
4. Click the **Smart Call** icon.

From the Lead's Profile Tab

1. Open the lead's detail page.
2. Click the **Profile** tab.
3. Under **Phone Numbers**, hover over the lead's number.
4. Click the **Call this Number** icon.

Both options trigger the same Smart Call flow described above — your phone rings first, and once answered, you are connected to the lead.

View All Call History (Calls Page)

To see a complete history of all calls made by you as a Realtor, across all leads:

1. Navigate to the left-hand menu.
2. Click **Calls**.

The Calls page displays every call with the lead's Name, Date, Duration, Call Type (Outgoing Call, Incoming Call, or Call Failed), and a **Recording** column with a **Play** link where a recording is

available.

View Call History for a Specific Lead

To check the calls made with a particular lead:

1. Open the lead's detail page.
2. Under the **Timeline** tab, click **ALL** to view all activity (including calls) with that lead, or click **Call Log** to view only the call records.

Each call entry shows the phone number, call type, duration, and recording status (or "No recording available" if none exists).

Call Recording

Every Smart Call made through AgentRoof CRM is automatically recorded once the call connects. Recorded calls can be accessed later from the **Calls** page, or from the lead's **Timeline > ALL / Call Log** tab, for reference or quality review.

Conclusion

You have successfully learned how to initiate a Smart Call from the Leads page, the lead's Timeline, and the lead's Profile tab; answer the call on your registered phone; get connected with the lead automatically; and view call history and recordings both across all leads (Calls page) and for a specific lead (Timeline / Call Log)

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