CALLN

Technical Note: CallN call Tagging

Tags are away to classify and report on calls within CallN. Creating and modifying tags is done from the CallN Portal and is easy to do. Log in to your CallN portal and click on "Manage Account" in the top right of the portal.

Manage Users | Manage Account | Contacts | My Profile | Logout

From the menu on the left, select TAGS. A list of the currentl available tags will show.

Click on the TAG's name and it will open up so changes can be made. All fileds can be modified, including the colour of the TAG. To add a new TAG, just click the "Add a new TAG" button on the right side of the TAG page. To remove a TAG, click the name of the TAG you want to remove and the TAG opens in a edit mode. Click the "Delete this TAG" button to remove the tag.

To TAG a call can be done either during the call from a handset or after the call form the CallN portal. To TAG calls while in progress, you need to setup key combinations to add the TAG. This is done from the Handset menu. Open the Handset menu by selecting Handset from the menuoption in the CallN Portal. On the right side of the page, click the "Preferences" button. Search down the page to the "By default, keypress action?" area.


Modify the current entries or add a new entry by clicking the "Add another action". Key presses must be unique and same length. You cannot for example have a TAG set to the # key and then add a new TAG for #1 as the system will only recognise the # key. CLikc Apply to save changes. When using this method to TAG calls, entering the key press combination during a call will attach the TAG to the call record.

Adding a TAG to a completed call is done from the portal. Select Calls form them enu option to display a list of calls. Find the call to be tagged and select the call. The call will open and begin to play back the recording.
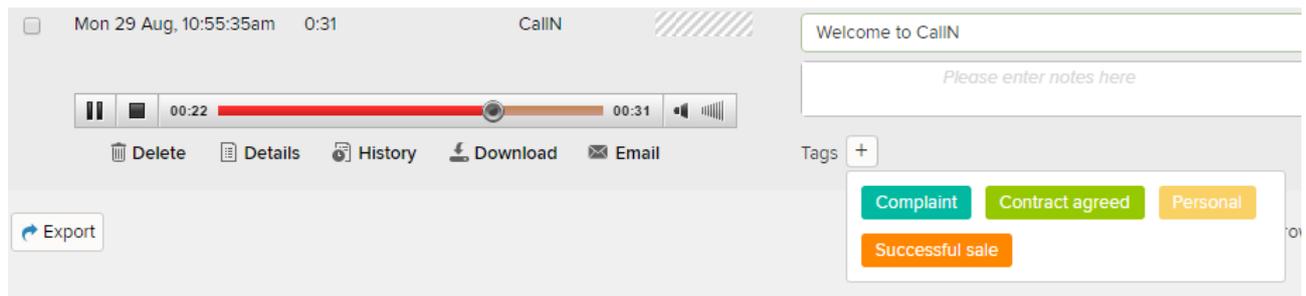
Click the '+' beside Tags to and select a tag from the list presented.

TAGs can be selected from anywhere that a filter can be applied to the displayed data, for example the reports menu or the calls menu.