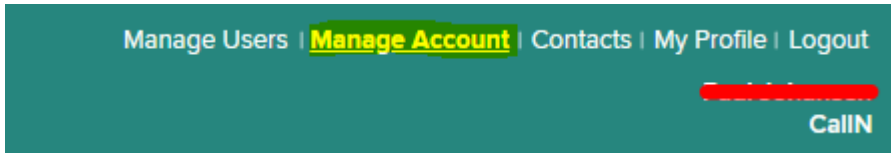


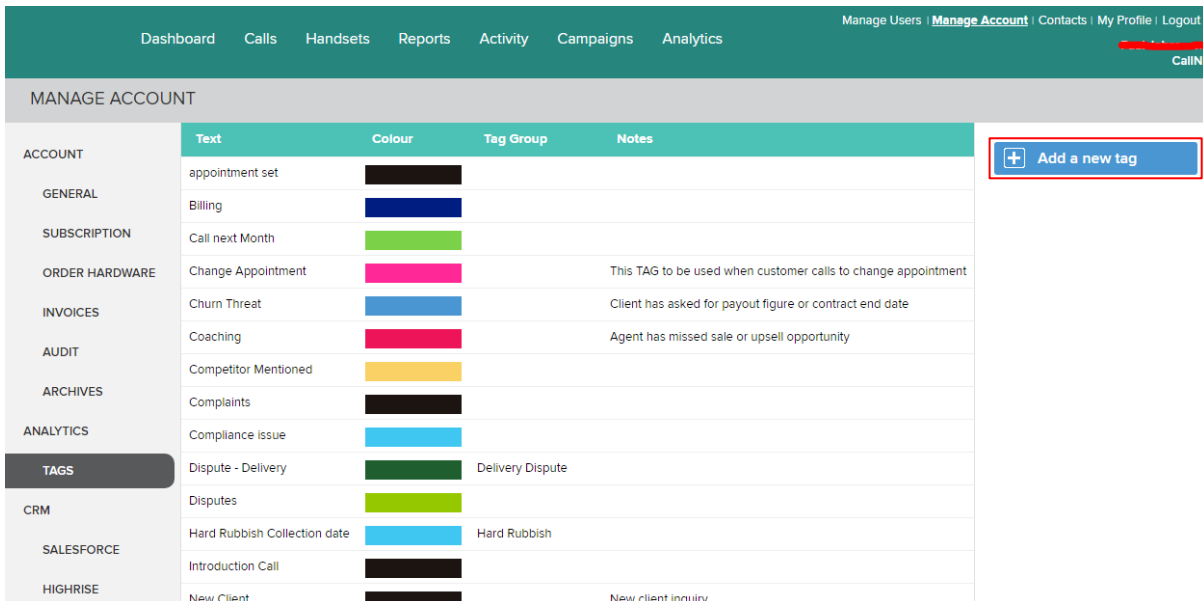
Technical Note: CallN call Tagging

Tags are a way 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.



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

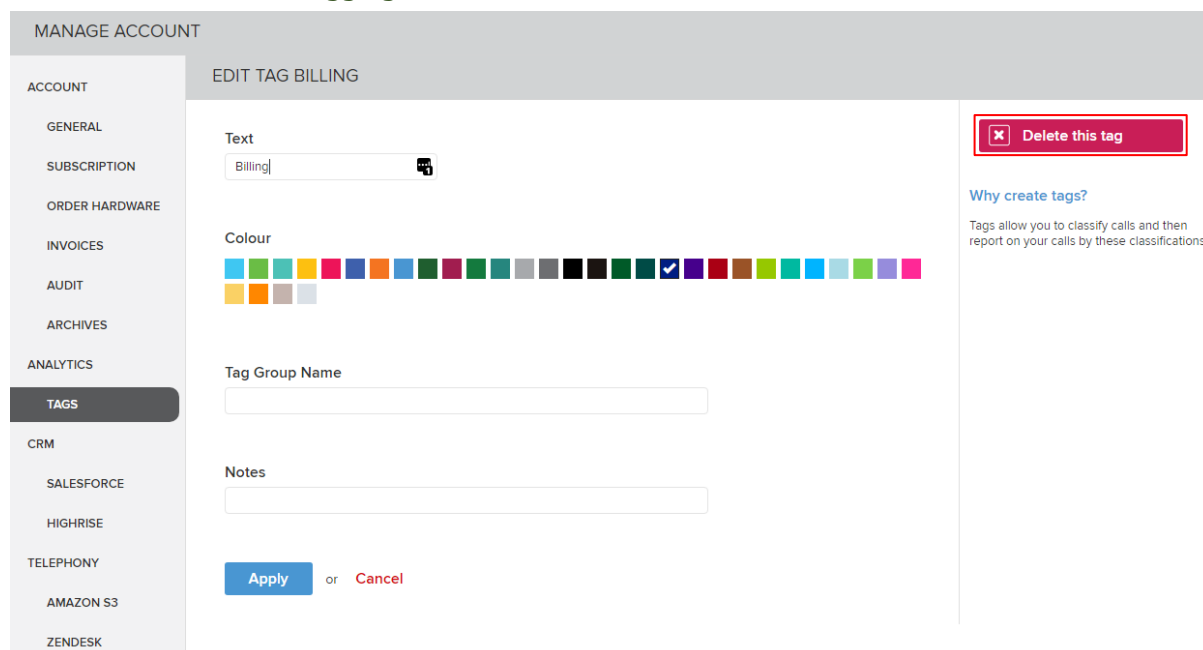


How to Create a Tag:

Click on Tag Name's to make required changes. You can modify *tag name, colour and notes*. To add a new TAG, Click on **Add a new Tag** button on the right-hand side of the page. *Refers to the above image.*

Delete a Tag:

To remove a TAG, click on the "tag name to be removed", and tag edit mode will open. In this window click on "Delete this tag" button to remove the tag. *Refers to below image:*

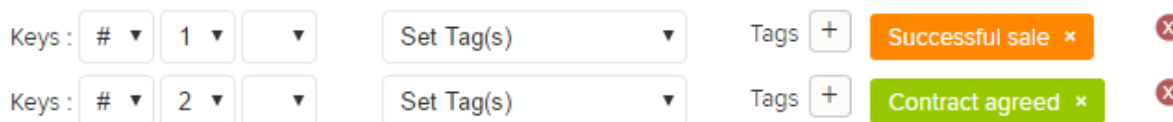


How to Apply a Tag:

Tagging a call is done in two ways:

- During the call from the handset.
 - To tag a call from the handset, you need to set up keypress combinations (keypress actions). To do so navigate to handset menu.
 - Select **Settings** from the left navigation bar.
 - Note:** You can add key actions for tags at handset level, Group level or account level.
 - Navigate to **“By default, keypress action”**.

By default, keypress actions



Add another action

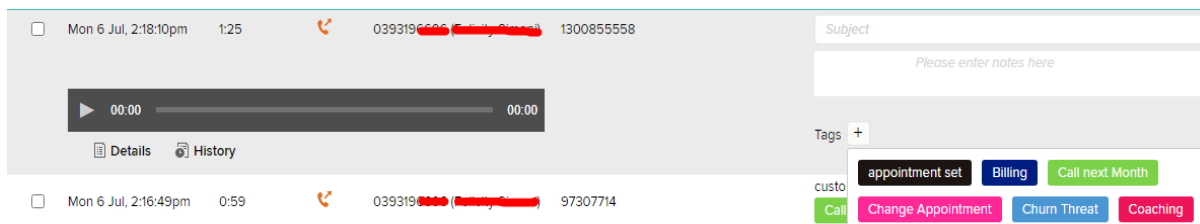
- Modify the current entries or add a new entry by clicking the "Add another action".
- Click Apply to save changes.

(When using this method to TAG calls, entering the keypress combination during a call, will attach the TAG to the call record.)

Note: Key presses must be the unique and of the same length. For example, You cannot have a TAG set to the # 'key and then add a new TAG '#1', as the system will only recognise the # key.

- After the call, form the CallN portal.
 - Once the call is uploaded to the portal. Select the call from the **Calls** menu.
 - Find the call to be tagged, click on the call.
 - Click (+) besides the tag to select a tag from the list. *As shown below.*

Tech Note: CallN Call Tagging



The screenshot shows two call records. The first call is from Mon 6 Jul, 2:18:10pm, 1:25 duration, with phone numbers 0393190000 and 1300855558. It features a play button and a progress bar at 00:00. Below the call record are 'Details' and 'History' icons. The second call is from Mon 6 Jul, 2:16:49pm, 0:59 duration, with phone numbers 0393190000 and 97307714. To the right of the second call, there is a 'Subject' field with the placeholder 'Please enter notes here'. Below that, a 'Tags' section is open, showing a list of tags: 'appointment set', 'Billing', 'Call next Month', 'Call', 'Change Appointment', 'Churn Threat', and 'Coaching'.

Tags can be used as filters to analyse data for specific tags. For example, viewing data in reports menu or calls menu, you can select tags in filter option.

Search by phone number, name or notes Filter

Date	Day of week	Time of day	Duration	Direction	Caller	Destination	Tag	Notes	Rating	Status
today	weekdays	morning	less than 3 minutes	incoming	custom	custom	complaint	empty	0 stars	not recorded
yesterday	weekends	afternoon	less than 10 minutes	outgoing			contract agreed	populated	1 star	
last week	monday	custom	less than 30 minutes	internal			personal	custom	2 stars	
last month	tuesday		less than 1 hour				successful sale		3 stars	
last 3 months	wednesday		more than 3 minutes				none		4 stars	
last 6 months	thursday		more than 10 minutes						5 stars	
last year	friday		more than 30 minutes							
last 5 years	saturday		more than 1 hour							
custom	sunday		custom							