

Pod Call Record - User Guide

Guide on using and navigating the Call Recording portal

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Overview



INFO: Your login details for access to the portal will have been emailed to you at the time the account was created. Please check your spam/junk folders. Please contact your Service Provider if you have not received them.

Logging In:

Open web browser to <https://recordings.podunifiedcomms.com/> (Chrome/Safari/Edge) Once open you will see the login page. Enter the **Username** and **Password** supplied by your Service Provider and click on **LOGIN**

Call Record Web Portal

SIGN IN

Login

Dashboard Login

Username
Username

Password
Password

LOGIN

Forgotten your password? [Click here](#) to reset it.

Once logged in you will see the main navigation menu on the left hand side.



INFO: Please note that the **Dashboard** is currently blank, this is not an error. **Analytics** is currently unavailable coming later on in a future update. The **Payment and Billing** section can be ignored this is due to be removed in a future update.

Call Record Web Portal

SIGN OUT

Dashboard

Welcome
Henry Jackson

Dashboard

- Dashboard
- Recordings
- Analytics
- Personnel
- Reports
- Payment & Billing
- Configuration

Recordings: Manage your numbers and view, edit and download your recordings.

Personal: Create users, agents, roles and departments, these can be linked to recordings.

Reports: Displays graphs on usage and recordings.

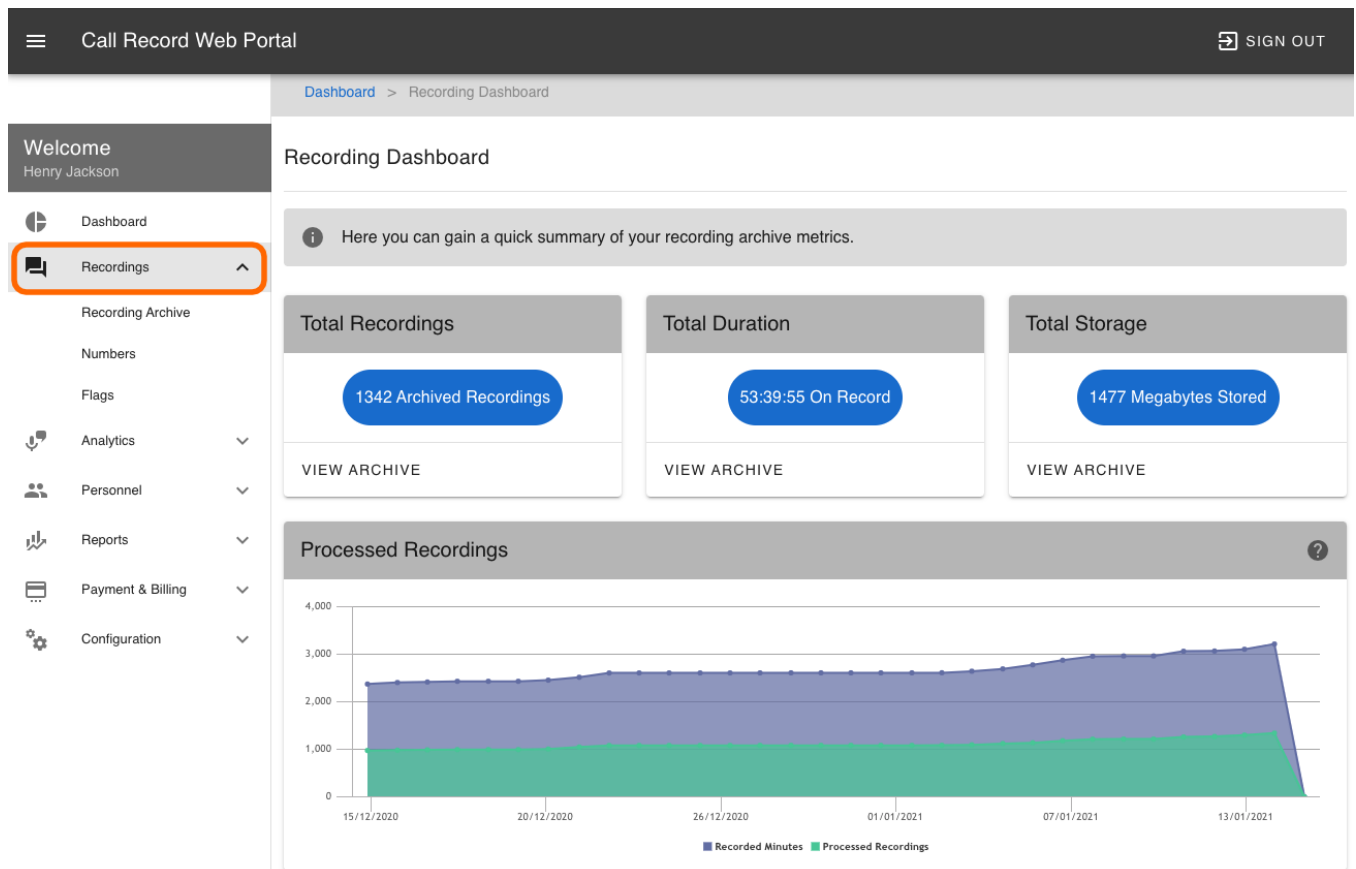
Configuration: Manage accounts settings and Company details.

Recordings

How to view and manage your recordings.

Recordings Dashboard

The Recordings Dashboard is designed to give quick access and an overview of all recordings. From the navigation menu on the left click on Recordings.



This page will give you an overview of the following:

Total Recordings: Total number of recordings that have been saved.

Total Duration: The total duration of all recordings in hours:minutes:seconds

Total Storage: Total space used by your recordings in Megabytes.

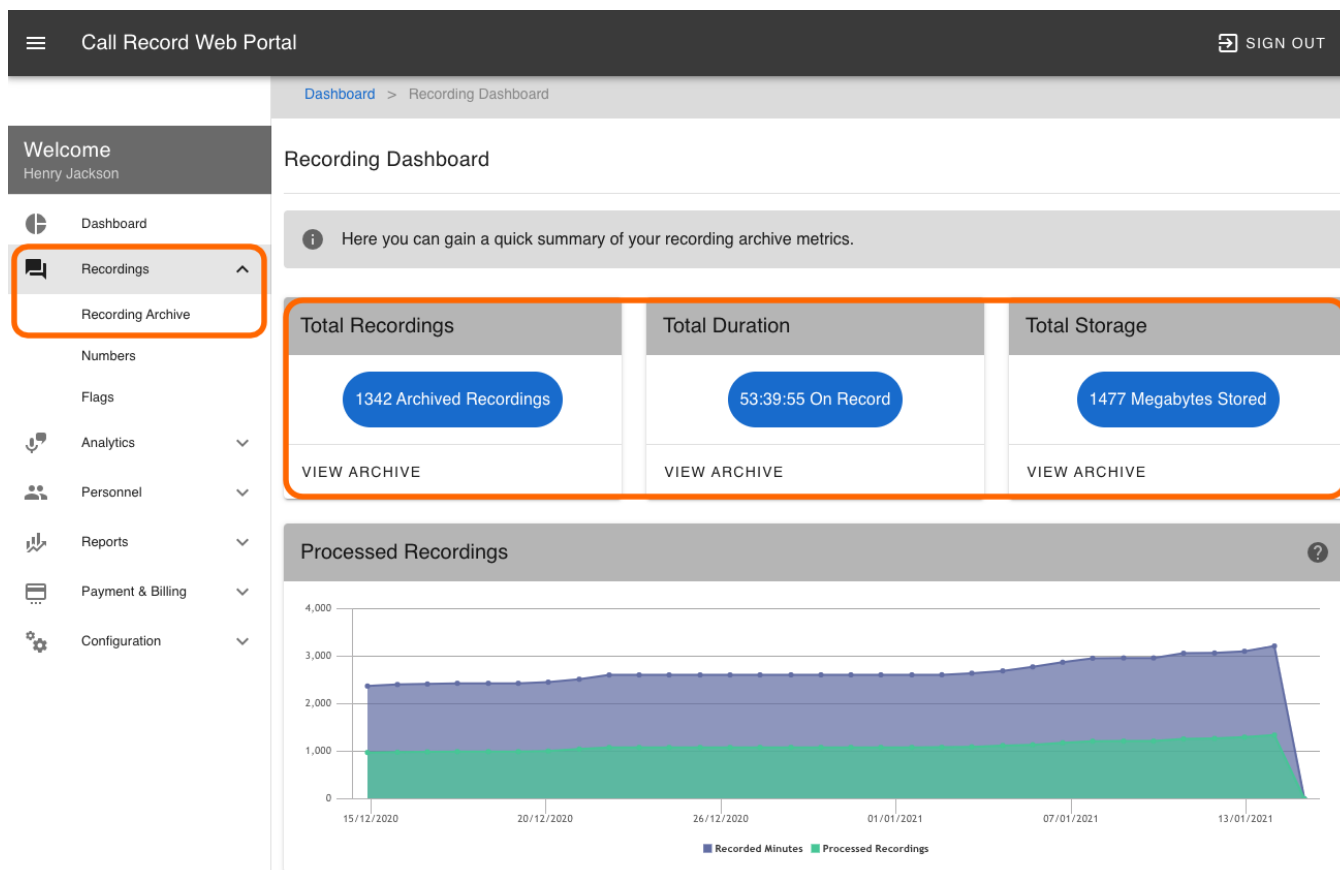


INFO: The Pod Call Record Storage space is currently unlimited. Please contact your Service Provider for further information.

The graph at the bottom will give you an overview of processed recordings over the last 30 days.











Viewing and Listening to Recordings

To view and listen to your recordings, from the navigation menu click on **Recordings** and then click on **Recording Archive**. Alternatively from the **Recording Dashboard** click on any of the **View Archive** links on the dashboard.



The **Recording Archive** page will list all stored recordings. To view a recording click on the view recording link.

The screenshot shows the 'Recording Archive' page. It features a table of recordings with columns: Connected At, From, To, Duration, Score, and Flags. The first row is highlighted, and the 'View' icon (eye) is circled in red. A 'FILTERS' button is located above the table.

| Connected At | From | To | Duration | Score | Flags |
|---------------------|----------|-----------|----------|-------|---|
| 15/01/2021 10:22:45 | 0785 | 0113 Ben | 00:04:57 | 0 |   |
| 14/01/2021 16:19:18 | 0121 | 0113 Ben | 00:14:13 | 0 |   |
| 14/01/2021 16:06:15 | 0780 | 0113 Alex | 00:00:06 | 0 |   |
| 14/01/2021 16:04:31 | 0113 Ben | 0121 | 00:00:53 | 0 |   |
| 14/01/2021 15:45:19 | 0113 Ben | 0447 | 00:04:22 | 0 |   |

The **Recording Details** page, will display details about the current recording.

Call Record Web Portal SIGN OUT

Dashboard > Recording Archive > Recording Details

Welcome
Henry Jackson

Dashboard

Recordings

Recording Archive

Numbers

Flags

Analytics

Personnel

Reports

Payment & Billing

Configuration

Recording Details

Assigned Flags
Assign Flags

Score
0

Recording Profile

| | | | |
|----------------------------|--------------------------|--|----------------------|
| From 0785 N/A N/A | To 0113 N/A Ben | Connected At 15/01/2021 10:22:45 | Duration 00:04:57 |
| | | Disconnected At 15/01/2021 10:27:42 | File Size 2.27MBs |

Media Player

00:00:00 00:04:57

Associated Calls

Current call

10:23:30 10:24:10 10:25:00 10:25:50 10:26:40 10:27:30

Recording Scorecard

Total: 0

There are currently no scorecard metrics assigned to this recording.

Sentiment Analysis

Call Sentiment
0

Agent Sentiment
0

Caller Sentiment
0

Category Analysis

No categories have been detected for this recording.

Notes

No notes have been added to this recording

The **Recording Profile** shows the **From** and **To** numbers, the date and time the call **Connected At** and **Disconnected At**, **Duration** of the call and **File Size**.

The **Media Player** will allow you to play the recording through your web browser.

Download a Recording

To download and save a recording to your computer. From the Recording Details page click on the download icon within the **Media Player**.

The screenshot displays the 'Call Record Web Portal' interface. The top navigation bar includes a 'SIGN OUT' button. The left sidebar shows a menu with options: Dashboard, Recordings (selected), Recording Archive, Numbers, Flags, Analytics, Personnel, Reports, Payment & Billing, and Configuration. The main content area is titled 'Recording Details' and shows the 'Recording Profile' for a call from 0785 to 0113 on 15/01/2021. The 'Media Player' section is highlighted with an orange box, and the download icon (a downward arrow) is circled in orange. Below the media player is the 'Associated Calls' timeline. The right sidebar contains sections for 'Recording Scorecard', 'Sentiment Analysis', 'Category Analysis', and 'Notes'.

Call Record Web Portal

Dashboard > Recording Archive > Recording Details

Welcome Henry Jackson

Dashboard

Recordings

Recording Archive

Numbers

Flags

Analytics

Personnel

Reports

Payment & Billing

Configuration

Recording Details

Assigned Flags

Assign Flags

Score 0

Recording Profile

From 0785 N/A N/A To 0113 N/A Ben Connected At 15/01/2021 10:22:45 Disconnected At 15/01/2021 10:27:42 Duration 00:04:57 File Size 2.27MBs

Media Player

00:00:00 00:04:57

Associated Calls

Current call

10:23:30 10:24:10 10:25:00 10:25:50 10:26:40 10:27:30

Recording Scorecard

Total: 0

There are currently no scorecard metrics assigned to this recording.

Sentiment Analysis

Call Sentiment 0

Agent Sentiment 0

Caller Sentiment 0

Category Analysis

No categories have been detected for this recording.

Notes

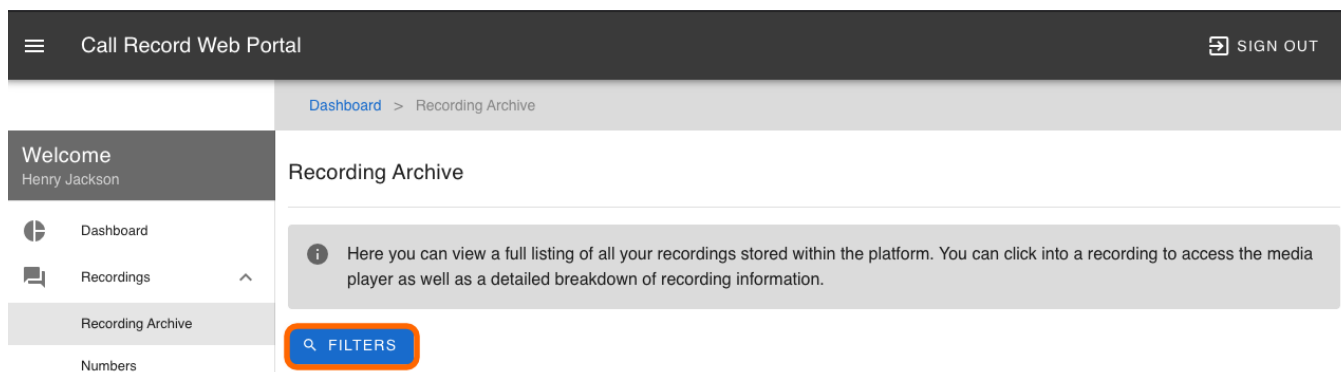
No notes have been added to this recording

The recording will now be downloaded to your computer, depending on web browser and operating system you may be prompted to choose a location to save the file.

The recording will be saved as an MP3 file and the file name will include the date, time, from and to numbers.

Find a Recording

On the **Recording Archive** page you also have the ability to filter the recording in order to narrow down a search. To do this click on **Filters**.



On the Filters window you can filter the Recording Archive page by searching any combination of the following:

| | |
|--|----------------------------------|
| From Number Enter From Number | Recorder Select Recorder ▼ |
| To Number Enter To Number | Flags Select Flags ▼ |
| Department Select Department ▼ | Score above Enter score above |
| Agent Select Agent ▼ | Score below Enter score below |
| Connected After Select Connected After Date | |
| Connected Before Select Connected Before Date | |
| <div>SEARCH RESET</div> | |

- **From Number:** A phone number that has called in
- **To Number:** A phone number that you have called
- **Department:** If configured you can filter calls by **Department**
- **Agent:** If configured you can filter calls by **Agent**
- **Connected After / Connected Before:** Enter date range to filter on
- **Flags:** If configured you can filter calls by **Flags**
- **Score Above / Score Below:** This is part of Analytics that will be available in a future update.
- **Recorder:** Leave blank unless using the external recorder.

In the example below we are using this to filter on calls made from **Agent Ben** that have been flagged as **New Business Enquiry**. When you have set the filters click on **Search**. You can Reset the filters by clicking on **Reset**.

| | |
|--|----------------------------------|
| From Number Enter From Number | Recorder Select Recorder |
| To Number Enter To Number | Flags New Business Enquiry |
| Department Select Department | Score above Enter score above |
| Agent Ben | Score below Enter score below |
| Connected After Select Connected After Date | |
| Connected Before Select Connected Before Date | |
| <div> <div>SEARCH</div> <div>RESET</div> </div> | |

If this example this has returned one call relating to the **Agent** Ben and **Flag** as New Business Enquiry.

| Connected At | From | To | Duration | Score | Flags |
|---------------------|-----------------|------------------------|----------|-------|--|
| 07/01/2021 10:52:02 | 0798 [redacted] | 0113 [redacted] Ben | 00:07:44 | 0 | <div> <div>New Business Enquiry</div> <div></div> <div></div> <div></div> </div> |

Rows per page: 10 20 50 100

Please remember to **Reset** the filters when you have finished.

Adding Notes

You can add Notes to any recording. There are two types of notes, first is a **Note** that covers the whole recording, the second is a **Timestamp Note** which can be placed at a set time within a recording.

To create a Note find and view the recording, on the **Recording Details** page click on the **Create Note** icon within the **Media Player**.

The screenshot shows the 'Call Record Web Portal' interface. The left sidebar contains navigation links: Dashboard, Recordings, Recording Archive, Numbers, Flags, Analytics, Personnel, Reports, Payment & Billing, and Configuration. The main content area is titled 'Recording Details' and includes a breadcrumb trail: Dashboard > Recording Archive > Recording Details. Below the breadcrumb, there's a section for 'Assigned Flags' with an 'Assign Flags' button and a 'Score' of 0. The 'Recording Profile' section displays call details: From (0795), To (0113), Connected At (15/01/2021 10:22:45), Disconnected At (15/01/2021 10:27:42), Duration (00:04:57), and File Size (2.27MBs). The 'Media Player' section is highlighted with an orange box and contains a play button, a volume slider, and a waveform. Below the waveform is a timeline for 'Associated Calls' showing the current call duration. To the right of the media player is a 'Recording Scorecard' section with a 'Total' score of 0 and a message: 'There are currently no scorecard metrics assigned to this recording.' Below the scorecard is a 'Sentiment Analysis' section with sliders for Call Sentiment, Agent Sentiment, and Caller Sentiment, all set to 0. Below that is a 'Category Analysis' section with a message: 'No categories have been detected for this recording.' At the bottom is a 'Notes' section with a message: 'No notes have been added to this recording.'

The **Create Note** box will appear, you can enter comments about the call. Click on **Create Note**.

Create Note

Content (required)

This is a standard note that covers the entire recording. | ?

CREATE NOTE

CANCEL

To create a **Timestamp Note**, using the **Media Player** click on the **Play/Pause** button to play the recording click on the **Play/Pause** where you want the note to be placed this will now pause the recording. Click on the **Create Timestamp Note** icon.

Call Record Web Portal

SIGN OUT

Dashboard > Recording Archive > Recording Details

Welcome
Henry Jackson

Dashboard

Recordings

Recording Archive

Numbers

Flags

Analytics

Personnel

Reports

Payment & Billing

Configuration

Recording Details

Assigned Flags

Assign Flags

Score
0

Recording Profile

From
0785
N/A

To
01132
N/A
Ben

Connected At
15/01/2021 10:22:45

Duration
00:04:57

Disconnected At
15/01/2021 10:27:42

File Size
2.27MBs

Media Player

00:00:49

00:04:57

Associated Calls

Current call

10:23:30

10:24:10

10:25:00

10:25:50

10:26:40

10:27:30

Recording Scorecard

Total: 0

There are currently no scorecard metrics assigned to this recording.

Sentiment Analysis

Call Sentiment
0

Agent Sentiment
0

Caller Sentiment
0

Category Analysis

No categories have been detected for this recording.

Notes

This is a note for this recording.

Henry Jackson @ 15/01/2021 13:20:50

This is a standard note that covers the entire recording.

Henry Jackson @ 15/01/2021 15:29:25

The **Create Timestamp Note** box will appear, this will include the timestamp of where the recording was paused. Enter your comments and click on **Create Note**.

Create Timestamped Note

Timestamp
00:00:49

Content (required)

Client became abusive while on the phone.

CREATE NOTE

CANCEL

You can view and edit all notes for a recording on the **Recording Details**, this is located to the lower right. From here you can **Edit**, **Delete** the note.

Notes

This is a note for this recording.

Henry Jackson @ 15/01/2021 13:20:50



This is a standard note that covers the entire recording.

Henry Jackson @ 15/01/2021 15:29:25



With a **Timestamp Note** you also have the option to **Play** the recording from the point where the Timestamp Note was created.

Client became abusive while on the phone.

Henry Jackson @ 18/01/2021 11:23:43



View Event History

The **View Event History** will show all the event relating to a recording. Go into view a recording and click on the **View Event History** within the **Media Player**.

Call Record Web Portal SIGN OUT

Dashboard > Recording Archive > Recording Details

Welcome Henry Jackson

Recording Details

Assigned Flags
Assign Flags Score 0

Recording Profile

| | | | |
|----------------------------|--------------------------|--|----------------------|
| From 0785 N/A N/A | To 0113 N/A Ben | Connected At 15/01/2021 10:22:45 | Duration 00:04:57 |
| | | Disconnected At 15/01/2021 10:27:42 | File Size 2.27MBs |

Media Player View Event History

00:00:00 00:04:57

Associated Calls

Current call

10:23:30 10:24:10 10:25:00 10:25:50 10:26:40 10:27:30

Recording Scorecard Total: 0

There are currently no scorecard metrics assigned to this recording.

Sentiment Analysis

Call Sentiment
0

Agent Sentiment
0

Caller Sentiment
0

Category Analysis

No categories have been detected for this recording.

Notes

No notes have been added to this recording

A new popup window will appear listing the Timestamp, User and the Event.

Recording Events

 FILTERS

| Timestamp | User | Event |
|---------------------|---------------|----------------|
| 15/01/2021 13:25:03 | Alex Grant | Play |
| 15/01/2021 13:20:50 | Henry Jackson | Add Note |
| 15/01/2021 13:19:43 | Henry Jackson | Play |
| 15/01/2021 13:18:14 | Henry Jackson | Play |
| 15/01/2021 13:18:01 | Henry Jackson | Play |
| 15/01/2021 13:16:49 | Alex Grant | Play |
| 15/01/2021 13:15:58 | Henry Jackson | Play |
| 15/01/2021 13:14:26 | Henry Jackson | Play |
| 15/01/2021 13:14:09 | Henry Jackson | Play |
| 15/01/2021 12:57:01 | Henry Jackson | Download |
| | | 1-10 of 12 < > |

CLOSE

You can use the **Filters** to search on events by User, Event and/or before/after a certain date.

Recording Events

 FILTERS

User
Select User

Event
Select an event

Events After
Select Events After

Events Before
Select Events Before

SEARCH RESET

| | | |
|---------------------|---------------|----------------|
| 15/01/2021 13:14:26 | Henry Jackson | Play |
| 15/01/2021 13:14:09 | Henry Jackson | Play |
| 15/01/2021 12:57:01 | Henry Jackson | Download |
| | | 1-10 of 12 < > |

CLOSE

Delete a Recording



INFO: PLEASE NOTE ONCE A RECORDING HAS BEEN DELETED IT CAN NOT BE RETRIEVED.

From the **Recording Archive** page click on the **Delete Recording** icon.

Call Record Web Portal

SIGN OUT

Dashboard > Recording Archive

Welcome
Henry Jackson

Dashboard

Recordings

Recording Archive

Numbers

Flags

Analytics

Personnel

Reports

Payment & Billing

Configuration

Recording Archive

Here you can view a full listing of all your recordings stored within the platform. You can click into a recording to access the media player as well as a detailed breakdown of recording information.

FILTERS

| Connected At | From | To | Duration | Score | Flags |
|---------------------|----------|-----------|----------|-------|-------|
| 15/01/2021 10:22:45 | 0785 | 0113 Ben | 00:04:57 | 0 | |
| 14/01/2021 16:19:18 | 0121 | 0113 Ben | 00:14:13 | 0 | |
| 14/01/2021 16:06:15 | 0780 | 0113 Alex | 00:00:06 | 0 | |
| 14/01/2021 16:04:31 | 0113 Ben | 0121 | 00:00:53 | 0 | |
| 14/01/2021 15:45:19 | 0113 Ben | 0447 | 00:04:22 | 0 | |

You will now prompted to confirm that this is the recording that you wish to delete. Click on **CONFIRM DELETE**

Call Record Web Portal

SIGN OUT

Dashboard > Recording Archive > Delete Recording

Welcome
Henry Jackson

Dashboard

Recordings

Recording Archive

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Delete Recording

Are you sure you want to delete the following recording?

⚠ When a recording is removed it will be deleted permanently. Please ensure you really wish to delete this recording!

🕒 15/01/2021 10:22:45 - 15/01/2021 10:27:42

📞 0113 <Ben>

📞 0785

CONFIRM DELETE CANCEL

The recording has now been deleted.

Managing Numbers

You can view and manage any of you numbers that have Call Recording enabled. Click on **Recordings** then click on **Numbers**, this will display your numbers:

Call Record Web Portal

SIGN OUT

Dashboard > Number Management

Welcome
Henry Jackson

Dashboard

Recordings

Recording Archive

Numbers

Flags

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Personnel

Reports

Payment & Billing

Configuration

Number Management

The recording enabled numbers allocated within the platform can be managed through this section. You can add new numbers to your recording list, update existing number configurations or permanently remove numbers from the platform.

FILTERS


| Number | Name | Department | Agent | |
|--------|--------------|------------|--------|--|
| 0113 | Alex Grant | | Alex | <div><div>VIEW</div><div>EDIT</div><div>DELETE</div></div> |
| 0113 | Marcus Child | | Marcus | <div><div>VIEW</div><div>EDIT</div><div>DELETE</div></div> |
| 0113 | Tracy Walker | | Tracy | <div><div>VIEW</div><div>EDIT</div><div>DELETE</div></div> |
| 0113 | Ben Kearns | | Ben | <div><div>VIEW</div><div>EDIT</div><div>DELETE</div></div> |

Rows per page:

15

1-4 of 4

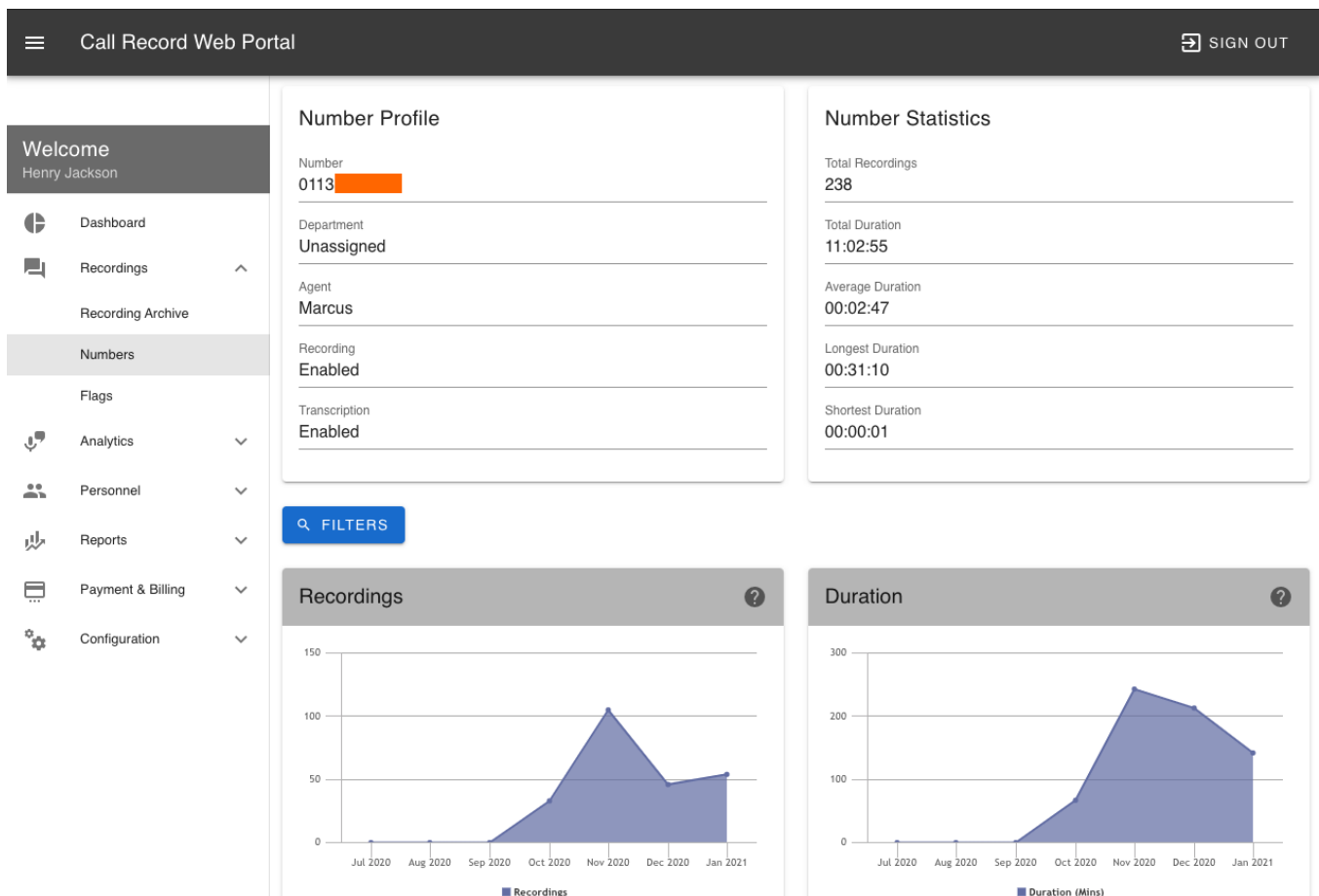
From here you view Number Statistics, Edit or Delete.



INFO:

Please note that **Deleting** a number will not cancel any billing, please contact your Service Provider if you cancel Call Recording on a specific number.

Number Statistics: You view Statistics on a number by clicking on the **View Statistics** icon, this will details about the number. You can also use the Filter to refine a search over a period of time.



Editing a Number: You can make changes to a number by clicking on the **Edit Number** icon. You can assign a **Name** to a number, this will only be displayed on the **Numbers** page. If **Departments** are configured you can select which department that number is under. If you configure **Agents** you can assign an **Agent** to a number this Agent name will be displayed on the Recording Archive for any recording that the number has made.

You can temporarily disable recording on a specific number by turning off **Can Record**

Once you have finished making changes click on **Save Changes**

Call Record Web Portal

SIGN OUT

Dashboard > Number Management > Edit Number

Welcome
Henry Jackson

Dashboard

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Edit Number

Number (required)
0113

Name
Marcus Child

Department
Support

Agent
Marcus

☒ Can Record

☐ Can Transcribe

☐ PCI Redaction Enabled

SAVE CHANGES

CANCEL



INFO: Please note **Transcribe** and **PCI Redaction** will be available at a later date. Please contact your Service further information.

Agents

You can assign an **Agent** (A person's name) to one or more numbers. To do this click on **Personal** then click on **Agents**. Next click on **Add Agent**

Call Record Web Portal

SIGN OUT

Dashboard > Agent Management

Welcome
Henry Jackson

Dashboard

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Payment & Billing

Configuration

Agent Management

You can manage and maintain a list of your organisation's agents through this sections. Agents are assigned recording enabled numbers allowing for a collection of detailed usage metrics generated from the collected recordings.

FILTERS

| Name | Department | Score | |
|--------|------------|-------|---|
| Alex | Support | 0 |    |
| Tracy | | 0 |    |
| Marcus | Support | 0 |    |
| Ben | | 0 |    |

Rows per page: 15 1-4 of 4

Using **Agents** will display the name on the **Recording Archive** page when a recording has been made with that Agent. You can also use the Agents to filter on. These will also be used for the **Analytics** and **Scorecards** once they become available in a future update.

On the **Create Agent** page add a Name for the agent, if you have departments configured select a department. Next select the **Number(s)** you would like to assign to this agent.

It is recommend to leave the Reviewer as blank, unless you are wanting to restrict access to the recordings. Selecting a reviewer (another user) will limit that user only to be able to see recording made by the Agent you have currently created.

Click on **Create Agent** when finished

Call Record Web Portal

SIGN OUT

Dashboard > Agent Management > Create Agent

Welcome
Alex Grant

Dashboard

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Create Agent

Name (required)
Henry Jackson

Department
Select Department

Numbers
Select Numbers

Select Reviewers

CREATE AGENT

CANCEL

You can **Delete** an **Agent** by clicking on the Delete icon on the **Agent Management** page. Deleting an Agent will not delete any recordings.

Departments



TIP: It is recommended to create your **Agents** and assign them to numbers before creating **Departments**

You can create **Departments** to use alongside Agents, to create a **Department** click on **Personal** and then click on **Departments**.

Using **Departments** will allow you to filter recordings on the **Recording Archive** page when a recording has been made with a number/agent assigned to that **Department**. These will also be used for the **Analytics** and **Scorecards** once they become available in a future update.

Call Record Web Portal

SIGN OUT

Dashboard > Department Management

Welcome
Alex Grant

Dashboard

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Department Management

Departments allow you to group your organisation's agents together in a structure typical of the majority of business environments. This grouping of agents can be used to generated an aggregate of agent metrics across an entire department.

FILTERS

Name

+ ADD DEPARTMENT

No data available

Rows per page: 15

Click on **Add Department**, add a **Name** for this **Department** then select which **Agents** from the list you would like to assign.

Next click on **Create Department**. Your created Department will now show on the Department Management page.

Flags

You may create and maintain a list of personalised flags that can be assigned to a recording. These flags are designed as a quick way of providing meaningful context and identifying a recording in the archive.

Creating Flags

To create a Flag click on **Recordings** and then click on **Flags** this will bring up the **Flag Management** page.

Call Record Web Portal

SIGN OUT

Dashboard > Flag Management

Welcome
Henry Jackson

Dashboard

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Flag Management

You may create and maintain a list of personalised flags that can be assigned to a recording. These flags are designed as a quick way of providing meaningful context and identifying a recording in the archive.

FILTERS

| Label | Description | |
|----------------------|---------------------------|--|
| Customer at risk | Coming to end of contract | |
| Client re-contracted | New solutions added | |
| New Business Enquiry | Website Enquiry | |
| Urgent FUP required | | |

Rows per page: 15 1-4 of 4

Click on **Add Flag** on the **Create Flag** page enter a **Label** for the flag, a **Description**, select **Color** for the icon and then select the **Icon** you would like to use. Click on **Create Flag** when ready.

Call Record Web Portal

SIGN OUT

Dashboard > Flag Management > Create Flag

Welcome
Henry Jackson

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Create Flag

Label (required)
New Product

Description (required)
Sold new product.

Colour (required)
#10FA00

Icon (required)
mdi-file-find

CREATE FLAG CANCEL

Your newly created Flag will appear on the **Flag Management** page. You edit or delete the flags at any time by clicking on the **Edit** and **Delete** icons.

| | | |
|-------------|-------------------|--|
| New Product | Sold new product. | |
|-------------|-------------------|--|

Assigning Flags

Now that you have created a Flag you can assign this to a recording. Click on **Recordings** then click on **Recording Archive**, find the recording that you would like the flag created above to be assigned to and click on **View Recording**.

On the **Recording Details** page for that recording click on the **Assigned Flags** to select the **Flag** that you created above.

The screenshot shows the 'Call Record Web Portal' interface. The top navigation bar includes a menu icon, the text 'Call Record Web Portal', and a 'SIGN OUT' button. The breadcrumb trail is 'Dashboard > Recording Archive > Recording Details'. The left sidebar shows a 'Welcome' message for Henry Jackson and a list of navigation items: Dashboard, Recordings (selected), Recording Archive, Numbers, Flags, Analytics, Personnel, Reports, Payment & Billing, and Configuration. The main content area is titled 'Recording Details'. It features a dropdown menu for 'Assigned Flags' with the following options: 'Customer at risk' (red flag icon), 'Client re-contracted' (green thumbs up icon), 'New Business Enquiry' (yellow flag icon), 'Urgent FUP required' (red clock icon), and 'New Product' (green flag icon). The 'New Product' option is highlighted. Below the dropdown is a 'Media Player' section with play, stop, and volume controls. To the right is a 'Recording Scorecard' section showing a 'Total: 0' and a message: 'There are currently no scorecard metrics assigned to this recording.'

Your recording now has an assigned flag. You can also assign multiple flags to recordings. Any recordings that have assigned flags will be shown on the **Recording Details** page.

Recording Details

The screenshot shows the 'Assigned Flags' section of the 'Recording Details' page. It displays two assigned flags: 'New Product' (green flag icon) and 'Client re-contracted' (green thumbs up icon). Each flag has a close button (X) next to it. There is a dropdown arrow and a help icon (?) to the right of the flags.

You can now use the **Filters** on the **Recording Archive** page to search for a flagged recording.

Users and Roles



INFO: Before creating any additional users you must first create a Role. This Role will be assigned to the user to create.

To create a Role click on **Personal** and then click on **Roles** in this example we are going to create an additional Administrator with all permissions.

On the **Create Role** page enter a **Label** and **Description** for the role. Next select which permissions are required, in this example we are creating another Administrator so we would select all permissions. Now click **Create Role**.

Call Record Web Portal

SIGN OUT

Dashboard > Role Management > Create Role

Welcome
Alex Grant

Dashboard

Recordings

Analytics

Personnel

Agents

Departments

Users

Roles

Reports

Payment & Billing

Configuration

Create Role

Label (required)

Administrator

Description

Additional admin users

Permissions (required)

Manage Roles

Manage Users

Manage Departments

Manage Customer

Manage Agents

Manage Flags

Manage Keywords

Manage Vocabulary Words

Manage Categories

Manage Recorders

Manage Numbers

Review Recordings

Review Statistics

Review Invoices

Manage Support Tickets

CREATE ROLE

CANCEL

You have now created a **Role** for an Administrator with all permissions.

Next we need to create a User to assign this role to. Click on **Personal** then click on **Users**. On the **User Management** page you will see a list of current users. The primary Administrator is highlighted with a star and should not be deleted.

Call Record Web Portal

SIGN OUT

Dashboard > User Management

Welcome
Henry Jackson

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User Management

You can manage your platform users through this section of the web portal. You can create new users, keep existing user records up to date or remove expired users restricting their access to the platform.

FILTERS

| Name | Username | Email Address | Role | |
|---------------|----------|---------------|-----------------|-------------|
| Alex Grant | | | ★ Administrator | <div></div> |
| Ben Kearns | | | Admin | <div></div> |
| Henry Jackson | | | Admin | <div></div> |

Rows per page: 15 1-3 of 3

Click on **Add User** to create a new user, on the **Create User** page enter the users **Name, Email Address, Username** and select the **Role** that you have created.

INFO: Please ensure that the email address is valid. The password will automatically be emailed once the user is created. Make sure that you check your spam/junk folders. If you have not received the email you can use the **Forgot Password** link on the login page to request a new one.

Forgot Password



INFO: If you do not know the email address or the Username that was used for the account please contact your Provider.

Forgot Password

From the Login page click on the forgot your password link

Call Record Web Portal

SIGN IN

Login

Dashboard Login

Username

Username

Password

Password

LOGIN

Forgotten your password? [Click here](#) to reset it.

Enter your email address for the account, and click on Submit

Call Record Web Portal

SIGN IN

Login > Forgot Password

Password Reset

Email Address

Email Address

RESET PASSWORD

When you have successfully reset your password [click here](#) to return to the login page.

If the email address you have entered is correct you will receive email contain a new password. Please check your Spam/Junk folders.



INFO: When the password is reset, It is recommended that you change your password once you have logged in

Changing Your Password

Once you have logged back in, from the Menu click on **Configuration** and then **Manage Account**

Call Record Web Portal

SIGN OUT

Dashboard > Configuration Dashboard

Welcome
Henry Jackson

Dashboard

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Configuration

My Account

Access Tokens

Customer Settings

Configuration Dashboard

Here you can manage the account configuration for both the personal account you use to access our service and given the correct permissions your organisations account settings.

My Account

Keep your personal account information such as your username and email address up to date. You can also reset your password here.

MANAGE ACCOUNT

Customer Settings

Update your customer account settings here to inform us of any changes to your organisation, this way we can ensure we provide the best experience.

MANAGE CUSTOMER

API Access

Login to the Call Record Web Service to configure developer API keys, allowing you to integrate your third party applications with the Call Record experience.

MANAGE API ACCESS

From here type in a new password and confirm the new password. Now click on **Save Changes**

Call Record Web Portal

SIGN OUT

Dashboard > Configuration > Edit Account

Welcome
Henry Jackson

Dashboard

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My Account

Access Tokens

Customer Settings

Edit Account

Name (required)
Henry Jackson

Email Address (required)
henry@myemail.com

Username (required)
henryj

Password
Enter new password

Password Confirmation
Confirm new password

SAVE CHANGES

Your password has now been changed. Click on sign out and then sign in with your new password.