

# 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.

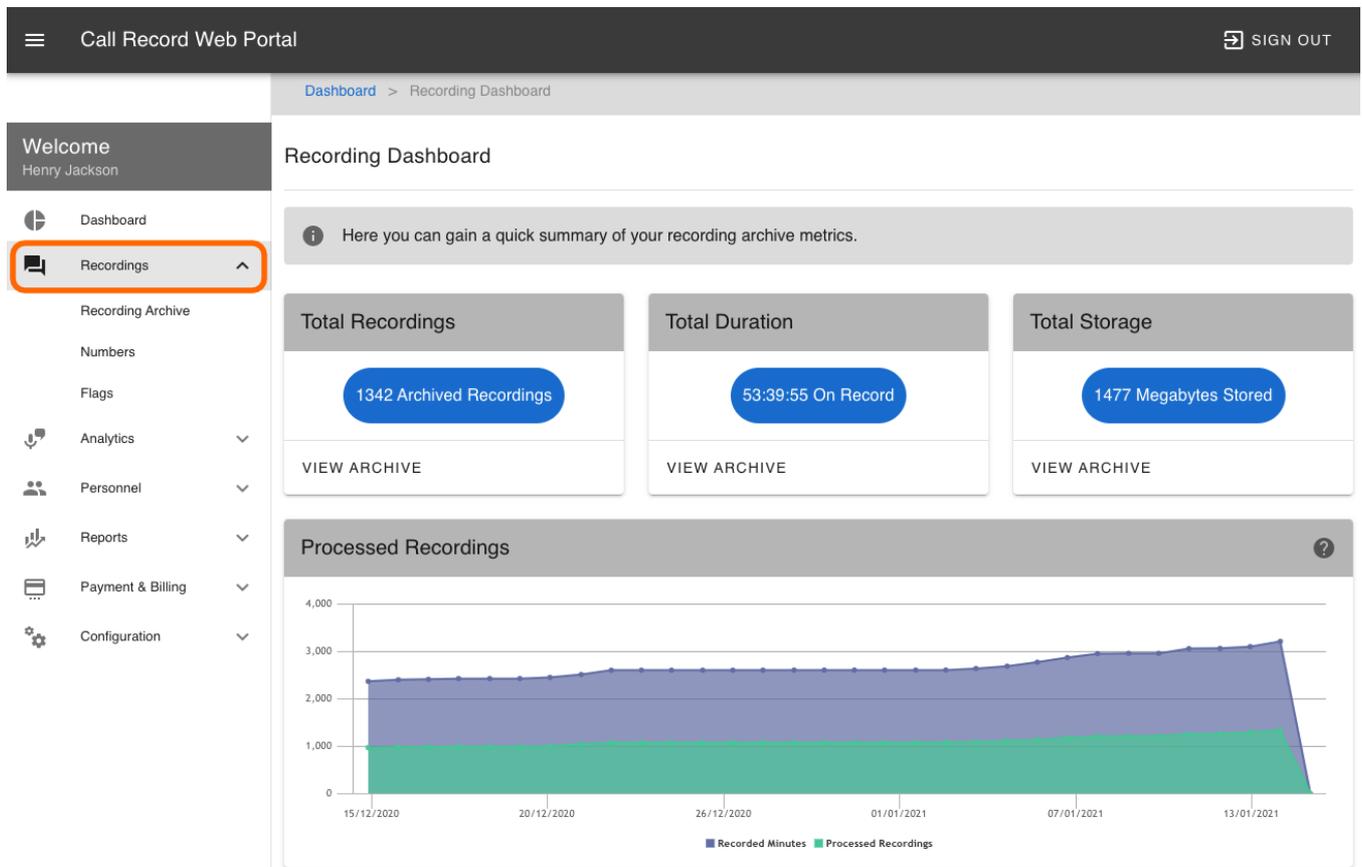
**Configuration:** Manage accounts settings and Company details.

# 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.

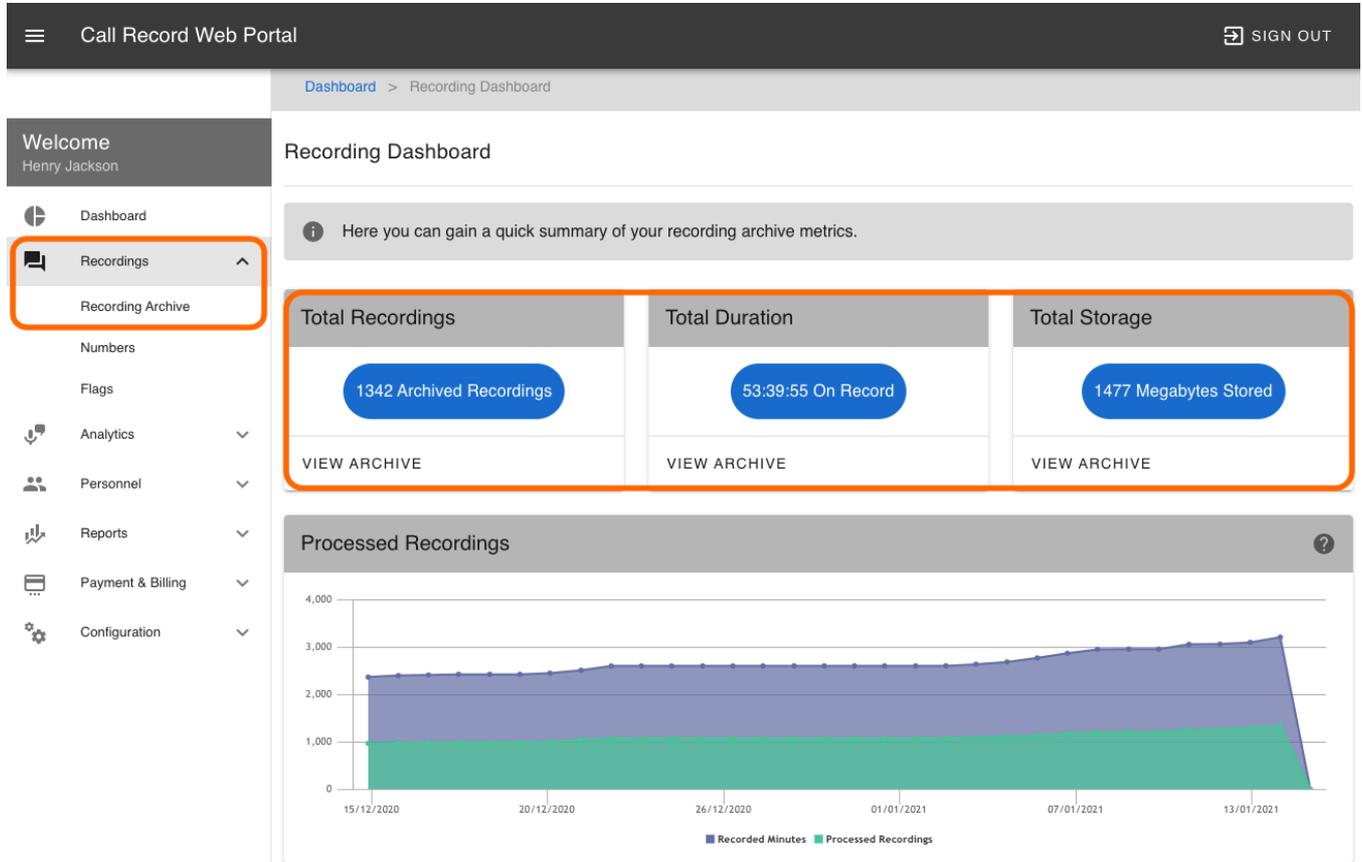


**INFO:** The Pod Call Record Storage space is currently unlimited. Please contact your Service Provider for further information.

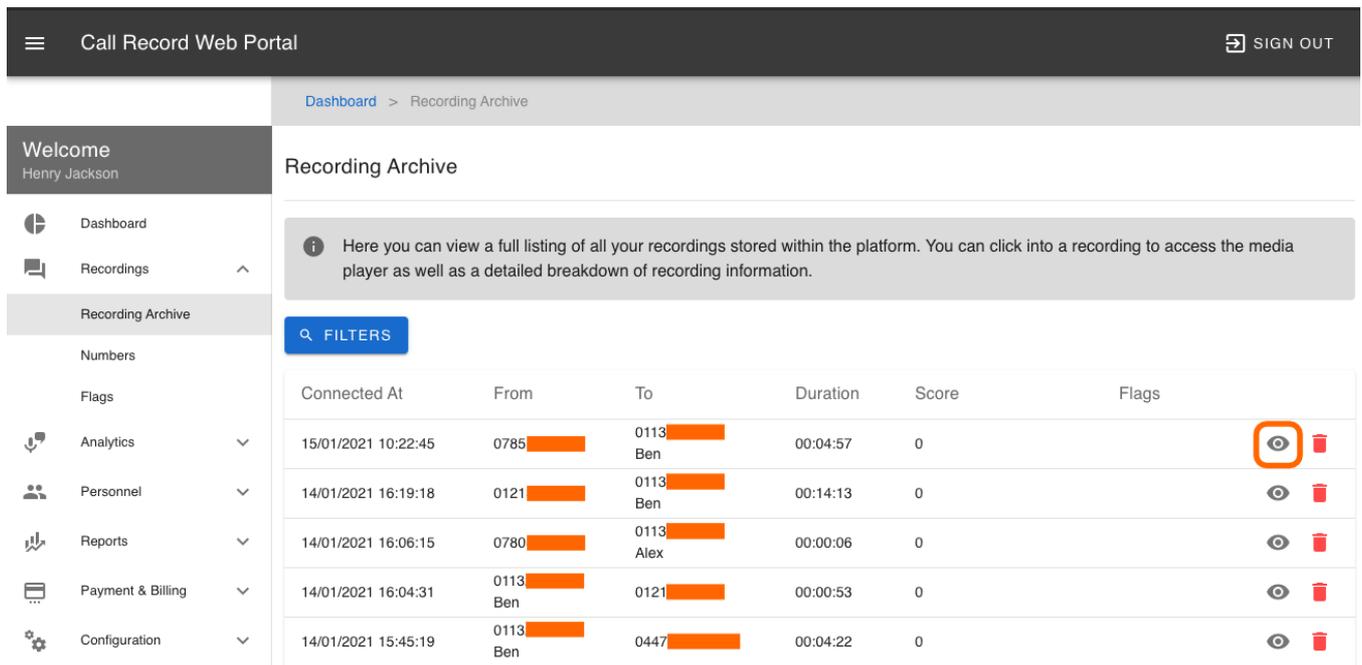
The graph at the bottom will give you an overview of processed recordings over the last 30 days.

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

Call Record Web Portal SIGN OUT

Dashboard > Recording Archive > Recording Details

Welcome Henry Jackson

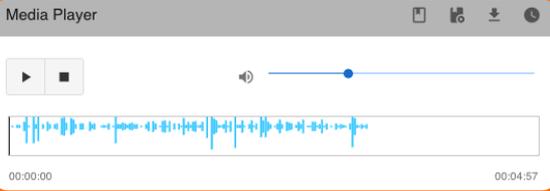
Recording Details

Assigned Flags  
Assign Flags Score 0

**Recording Profile**

<b>From</b> 0785 N/A N/A	<b>To</b> 0113 N/A Ben	<b>Connected At</b> 15/01/2021 10:22:45	<b>Duration</b> 00:04:57
		<b>Disconnected At</b> 15/01/2021 10:27:42	<b>File Size</b> 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 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. Below the navigation bar is a breadcrumb trail: 'Dashboard > Recording Archive > Recording Details'. The main content area is titled 'Recording Details' and includes a 'Welcome Henry Jackson' header. A left sidebar contains navigation options: Dashboard, Recordings (expanded), Recording Archive, Numbers, Flags, Analytics, Personnel, Reports, Payment & Billing, and Configuration. The main content area is divided into several sections: 'Assigned Flags' with an 'Assign Flags' button and a 'Score 0' indicator; 'Recording Profile' with a table of call details; 'Media Player' (highlighted with an orange box) containing a play button, volume control, and a waveform; 'Recording Scorecard' with a 'Total: 0' indicator and a message 'There are currently no scorecard metrics assigned to this recording.'; 'Sentiment Analysis' with three sliders for 'Call Sentiment', 'Agent Sentiment', and 'Caller Sentiment', all set to 0; 'Category Analysis' with a message 'No categories have been detected for this recording.'; and 'Notes' with a message 'No notes have been added to this recording.' The 'Recording Profile' table contains the following data:

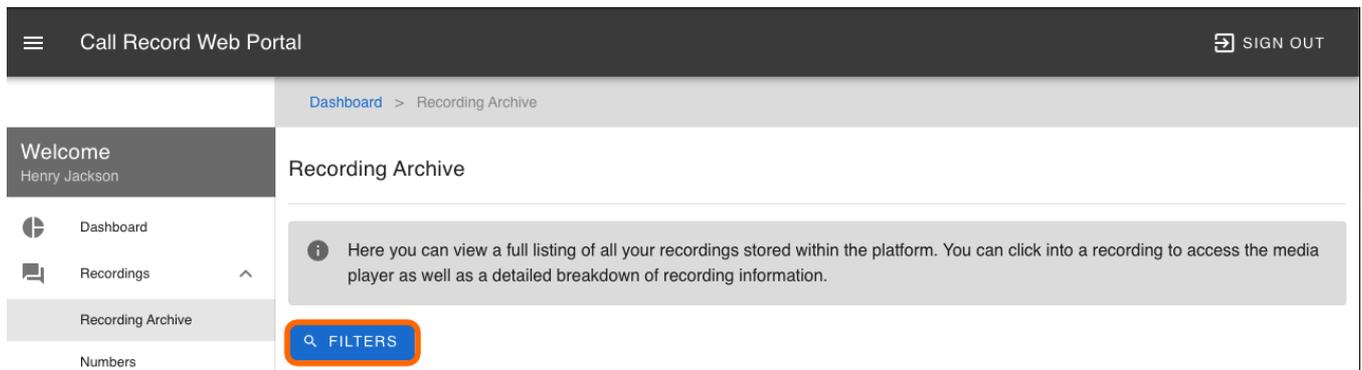
From	To	Connected At	Duration
0785 [redacted]	0113 [redacted]	15/01/2021 10:22:45	00:04:57
N/A	N/A	Disconnected At	File Size
N/A	Ben	15/01/2021 10:27:42	2.27MBs

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	
<input type="button" value="SEARCH"/> <input type="button" value="RESET"/>	

- **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

SEARCH RESET

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	New Business Enquiry

Rows per page: [dropdown] < >

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 'Recording Details' page in the 'Call Record Web Portal'. The page is divided into several sections:

- Recording Profile:** A table with columns for 'From', 'To', 'Connected At', 'Duration', 'Disconnected At', and 'File Size'. The 'From' field shows '0785', 'N/A', and 'N/A'. The 'To' field shows '0113', 'N/A', and 'Ben'. 'Connected At' is '15/01/2021 10:22:45' and 'Duration' is '00:04:57'. 'Disconnected At' is '15/01/2021 10:27:42' and 'File Size' is '2.27MBs'.
- Media Player:** A section with a play/pause button, a volume slider, and an audio waveform. A 'Create Note' icon (a document with a plus sign) is circled in orange in the top right corner of the player.
- Recording Scorecard:** Shows 'Total: 0' and a message: 'There are currently no scorecard metrics assigned to this recording.'
- Sentiment Analysis:** Three sliders for 'Call Sentiment', 'Agent Sentiment', and 'Caller Sentiment', all set to '0'.
- Category Analysis:** Shows 'No categories have been detected for this recording.'
- Notes:** Shows '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

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 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

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**.

The screenshot displays the 'Call Record Web Portal' interface. At the top, there is a navigation bar with 'Call Record Web Portal' and a 'SIGN OUT' button. Below this is a breadcrumb trail: 'Dashboard > Recording Archive > Recording Details'. A left sidebar contains a 'Welcome' message for Henry Jackson and a menu with options like 'Dashboard', 'Recordings', 'Recording Archive', 'Numbers', 'Flags', 'Analytics', 'Personnel', 'Reports', 'Payment & Billing', and 'Configuration'. The main content area is titled 'Recording Details' and includes an 'Assigned Flags' section with an 'Assign Flags' button and a 'Score' of 0. Below this is a 'Recording Profile' section with a table of call details:

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

The 'Media Player' section is highlighted with an orange box and contains a play button, a volume slider, and a waveform visualization. Below the media player is an 'Associated Calls' section with a timeline showing the 'Current call' from 10:23:20 to 10:27:30. To the right of the media player are three sections: 'Recording Scorecard' (Total: 0), 'Sentiment Analysis' (Call, Agent, and Caller Sentiment all at 0), and 'Category Analysis' (No categories detected). At the bottom right is a 'Notes' section with the message '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

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	<span>👁</span> <span style="border: 2px solid orange; border-radius: 50%; padding: 2px;">🗑</span>
14/01/2021 16:19:18	0121	0113 Ben	00:14:13	0	<span>👁</span> <span style="color: red;">🗑</span>
14/01/2021 16:06:15	0780	0113 Alex	00:00:06	0	<span>👁</span> <span style="color: red;">🗑</span>
14/01/2021 16:04:31	0113 Ben	0121	00:00:53	0	<span>👁</span> <span style="color: red;">🗑</span>
14/01/2021 15:45:19	0113 Ben	0447	00:04:22	0	<span>👁</span> <span style="color: red;">🗑</span>

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
- Numbers
- Flags
- Analytics
- Personnel
- Reports
- Payment & Billing
- Configuration

## 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 your numbers that have Call Recording enabled. Click on **Recordings** then click on **Numbers**, this will display your numbers:

The screenshot shows the 'Call Record Web Portal' interface. At the top, there is a navigation bar with a menu icon, the text 'Call Record Web Portal', and a 'SIGN OUT' button. Below this is a breadcrumb trail: 'Dashboard > Number Management'. On the left, a sidebar contains a 'Welcome' section for 'Henry Jackson' and a list of menu items: Dashboard, Recordings, Recording Archive, Numbers (highlighted), Flags, Analytics, Personnel, Reports, Payment & Billing, and Configuration. The main content area is titled 'Number Management' and features an information box stating: '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.' Below this is a 'FILTERS' button and a table with columns for 'Number', 'Name', 'Department', and 'Agent'. The table lists four numbers, each with a 'View Statistics' icon, an 'Edit' icon, and a 'Delete' icon. A '+ ADD NUMBER' button is located in the top right of the table area. At the bottom right of the table, it shows 'Rows per page: 15' and '1-4 of 4' with navigation arrows.

Number	Name	Department	Agent	
0113 [redacted]	Alex Grant		Alex	
0113 [redacted]	Marcus Child		Marcus	
0113 [redacted]	Tracy Walker		Tracy	
0113 [redacted]	Ben Kearns		Ben	

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.

Welcome  
Henry Jackson

- Dashboard
- Recordings
- Recording Archive
- Numbers**
- Flags
- Analytics
- Personnel
- Reports
- Payment & Billing
- Configuration

### Number Profile

Number  
0113

Department  
Unassigned

Agent  
Marcus

Recording  
Enabled

Transcription  
Enabled

### Number Statistics

Total Recordings  
238

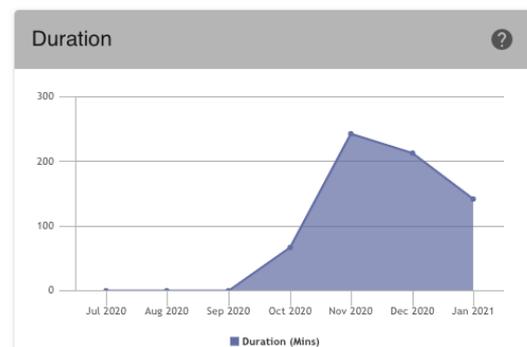
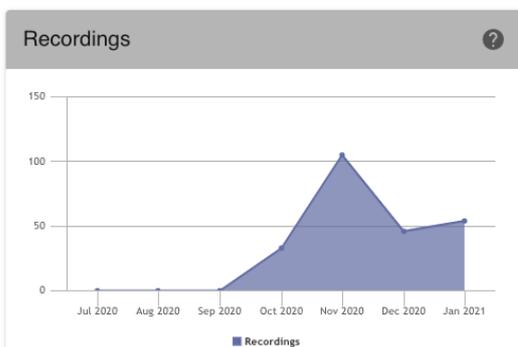
Total Duration  
11:02:55

Average Duration  
00:02:47

Longest Duration  
00:31:10

Shortest Duration  
00:00:01

[FILTERS](#)



**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**

[Dashboard](#) > [Number Management](#) > Edit Number

Welcome  
Henry Jackson

- Dashboard
- Recordings
- Recording Archive
- Numbers**
- Flags
- Analytics
- Personnel
- Reports
- Payment & Billing
- Configuration

### 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

**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

Welcome  
Alex Grant

- Dashboard
- Recordings
- Analytics
- Personnel
- Agents**
- Departments
- Users
- Roles
- Reports
- Payment & Billing
- Configuration

### Create Agent

Name (required)  
Henry Jackson

Department  
Select Department

Numbers  
Select Numbers

0113

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.

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. Below the navigation bar, the breadcrumb trail reads 'Dashboard > Department Management'. The left sidebar contains a 'Welcome Alex Grant' section and a list of menu items: Dashboard, Recordings, Analytics, Personnel, Agents, Departments (highlighted), Users, Roles, Reports, Payment & Billing, and Configuration. The main content area is titled 'Department Management' and features an information box explaining that departments group agents for metrics. Below this is a 'FILTERS' button and a table with a 'Name' column and an '+ ADD DEPARTMENT' button. The table currently shows 'No data available'. At the bottom right of the table, there is a 'Rows per page' dropdown set to '15' and navigation arrows.

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  
Recordings  
Recording Archive  
Numbers  
**Flags**  
Analytics  
Personnel  
Reports  
Payment & Billing  
Configuration

### 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

### 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. Below the navigation bar, the breadcrumb trail reads 'Dashboard > Recording Archive > Recording Details'. The main content area is titled 'Recording Details'. On the left, there is a sidebar with a 'Welcome Henry Jackson' header and a list of navigation items: Dashboard, Recordings (selected), Recording Archive, Numbers, Flags, Analytics, Personnel, Reports, Payment & Billing, and Configuration. The 'Assigned Flags' dropdown menu is open, showing a list of flags: 'Customer at risk', 'Client re-contracted', 'New Business Enquiry', 'Urgent FUP required', and 'New Product'. The 'New Product' flag is highlighted with an orange box. To the right of the dropdown, there is a 'Score' section with a star icon and the number '0'. Below the dropdown, there is a 'Media Player' section with a play button, a volume slider, and a 'Recording Scorecard' section with a 'Total: 0' indicator. The scorecard text reads: '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

Assigned 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.

Welcome  
Henry Jackson

- Dashboard
- Recordings
- Analytics
- Personnel
- Agents
- Departments
- Users**
- Roles
- Reports
- Payment & Billing
- Configuration

### User Management

**i** 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.

Name	Username	Email Address	Role	<a href="#">+ ADD USER</a>
Alex Grant	[REDACTED]	[REDACTED]	<span>★ Administrator</span>	<a href="#">✎</a> <a href="#">🗑</a>
Ben Kearns	[REDACTED]	[REDACTED]	Admin	<a href="#">✎</a> <a href="#">🗑</a>
Henry Jackson	[REDACTED]	[REDACTED]	Admin	<a href="#">✎</a> <a href="#">🗑</a>

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