

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.

The screenshot shows the 'Flag Management' page. At the top, there's a navigation bar with 'Call Record Web Portal' and a 'SIGN OUT' button. Below that, a breadcrumb trail reads 'Dashboard > Flag Management'. On the left, a sidebar menu includes 'Welcome Henry Jackson' and various navigation options like 'Dashboard', 'Recordings', 'Recording Archive', 'Numbers', 'Flags', 'Analytics', 'Personnel', 'Reports', 'Payment & Billing', and 'Configuration'. The main content area is titled 'Flag Management' and contains an information message: '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.' Below the message is a 'FILTERS' button. A table lists existing flags:

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

At the bottom right of the table, there's a 'Rows per page: 15' dropdown and a '1-4 of 4' pagination control. A '+ ADD FLAG' button is highlighted in the top right corner of the table area.

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.

The screenshot shows the 'Create Flag' page. The breadcrumb trail is 'Dashboard > Flag Management > Create Flag'. The sidebar is the same as in the previous screenshot. The main content area is titled 'Create Flag' and contains the following form fields:

- Label (required)**: New Product (with a help icon)
- Description (required)**: Sold new product. (with a help icon)
- Colour (required)**: #10FA00 (with a color picker icon and a help icon)
- Icon (required)**: mdi-file-find (with an icon picker icon and a help icon)

At the bottom, there are two buttons: 'CREATE FLAG' (highlighted) and '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.

This screenshot shows a single row from the flag management table. It features a green speech bubble icon, the label 'New Product', and the description 'Sold new product.'. On the right side, there are two icons: a blue pencil (edit) and a red trash can (delete), both highlighted with an orange border.

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 contains a 'Welcome Henry Jackson' section and a navigation menu with 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 an 'Assigned Flags' dropdown menu with the following options: 'Customer at risk', 'Client re-contracted', 'New Business Enquiry', 'Urgent FUP required', and 'New Product'. The 'New Product' option is highlighted with an orange box. To the right of the dropdown is a 'Score' section showing a star icon and the number '0'. Below the dropdown is a 'Media Player' section with play, stop, and volume controls. To the right of the media player is a 'Recording Scorecard' section with a 'Total: 0' indicator 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.

The screenshot shows the 'Recording Details' page. The 'Assigned Flags' section is visible, showing a dropdown menu with the following options: 'New Product' and 'Client re-contracted'. Both flags are highlighted with orange boxes. The interface also shows a 'Recording Scorecard' section with a total score of 0 and a message: 'There are currently no scorecard metrics assigned to this recording.'

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

- 🔄 Revision #1
- ★ Created Tue, Jan 19, 2021 10:17 AM by [Admin](#)
- ✎ Updated Tue, Jan 19, 2021 10:49 AM by [Admin](#)