

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

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Configuration

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.	
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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, 'Call Record Web Portal', and a 'SIGN OUT' button. The breadcrumb trail is 'Dashboard > Recording Archive > Recording Details'. The left sidebar shows a 'Welcome Henry Jackson' message 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 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' flag is selected. 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 the text 'There are currently no scorecard metrics assigned to this recording.' and a 'Total: 0' indicator.

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

New Product Client re-contracted

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

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