

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		

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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. 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' score 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

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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