telmetrics

Call Tagging
QUICK START GUIDE

About Telmetrics Call Tagging

Today, Telmetrics gathers a tremendous amount of data related to Calls, Callers and Web Sessions, which can help marketers achieve a variety of objectives. With such flexibility and robust data, it can be somewhat difficult to efficiently glean insights in a meaningful way as different programs or campaigns may have different intents and associated success metrics. For example, a National Brand using DNI may be interested in which keywords are driving the most calls, whereas a local business may only be interested in calls from callers in their local area, and who have made an appointment.

Through the use of Call Tagging, users can now pre-define the call criteria which matches their campaign targets, calls are then automatically tagged according to what is important, and then the Tagged calls are available in reporting for effective review of the calls identified as most important. Call Tagging will automatically derive the most pertinent performance data that is specific to a campaign or any other business objective, allowing marketers to optimize and/or pivot as often and as accurately as they deem necessary.

Additionally, it is now possible to manually assign tags to your calls as part of your manual analysis and review of call data. This can be invaluable for those looking to identify patterns in call data that were previously unknown, which can then be leveraged in custom AI. Manual Tagging is a flexible and easy way to segment calls in any way that makes sense for your business, so the possibilities in leverage this simple, yet powerful tool are endless.

In this set-up guide we will walk you through how to create and configure Call Tags, associate them with numbers in your call tracking program and review the results.

Setting Up Call Tags

1. To get started with setting up Call Tags for your Organization, go to 'Settings' in the left-side navigation and click on the '**Call Tags**' option
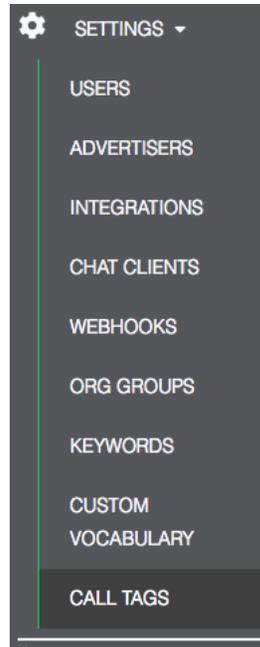
2. On the Call Tag Management screen, click the '**Add New Call Tag**' button to launch the configuration modal.

3. Within the Tagging configuration modal there are two common elements that are required for each call tag, the '**Tag Name**' and '**Tag Description**'. Both of these fields are required for every tag, and will accept any unique name and any user input description.

4. The '**Tag Type**' will then need to be specified if your organization is configured to utilize both Automatic and Manual Call Tags. If only one of the tag types have been enabled for your organization, this configuration item will not appear, and the configuration modal will be defaulted to the tag type available according to the organization settings.

5. When the '**Tag Type**' is set to '**Manual**', then the configuration is complete, and the call tag will be available when the '**Create**' button is clicked.

6. When the '**Tag Type**' is set to '**Auto**', then at least one criteria must be specified before creating the tag. Clicking the '**Add Criteria**' button will display the criteria options. There are no limits to the number of criteria that can be added to a Tag, however it is generally a best practice to use the fewest number of criteria possible so that the Tag is not too restrictive.

Here is a complete list of the various criteria options, and the available configuration parameters for each:

Criteria	Options	Criteria Per Tag	Considerations
Call Status	Answered, Missed, Stop Call	Single	
Call Duration	Minimum **x** Min/Sec	Single	Min=1sec, Max=60min
Call Day of Week	Su, M, Tu, W, Th, F, Sa	Single	
Call Time of Day	Between **x** and **y** time AM/PM	Single	30 minute intervals
Call Keywords	# Matches per Keyword List	Multiple	Matching >=, <= to specified number or All keywords
Call Scoring	Lead, Non-Lead, VoiceMail, <Custom Models>	Multiple	1 Model per criteria
Redaction	Yes, No	Single	PCI Redaction
Device Type	Mobile, Landline, Business	Single	
Landing Page		Multiple	Wildcard/contains matching against user defined input
UTM_Source	List of DNI Referrers	Multiple	
UTM_Campaign		Multiple	Wildcard/contains matching against user defined input
UTM_Term		Multiple	Wildcard/contains matching against user defined input
UTM_Medium		Multiple	Wildcard/contains matching against user defined input
DNI Multi-Session	Yes, No	Single	

Managing Call Tags

1. Once Call Tags have been created they will be displayed in a grid on the Call Tag management screen.

2. The '**Edit**' option will launch the Call Tag configuration modal where tag properties can be modified as described in the previous section. The '**Delete**' option will remove the tag from the management page, while also deleting **ALL** reference to the tag for **ALL** calls. Users will be prompted for confirmation before proceeding with a tag deletion.

Assigning Auto Call Tags to a Tracking Number

1. Configured Auto Tags will be added to a Tracking Number so that all calls made to that number can be evaluated against the criteria, and if satisfied, have the Call Tag automatically associated with the call. When editing a Call Tracking Number a new '**Call Tags**' section will now be displayed where up to three tags may be selected and added to a Call Tracking Number.

2. Call Tags may be removed from a Tracking Number at any time by clicking the '**delete**' link when editing the number. This action will result in calls no longer being evaluated for the deleted tag, however all tags assigned to existing calls will remain in place.

Assigning Manual Call Tags to Calls

1. Manual Call Tags may be assigned to a call through the Call View, access through various reports. When viewing a call a new '**Call Tags**' section will be displayed where available Manual Tags can be selected from a list. Up to three tags may be selected for any call.

2. Once tags have been selected and added as an element of the call, the updated will need to be saved by clicking the '**Save Tags**' link. Similarly, when deleting the manual tag the '**Save Tags**' link must be clicked for the changes to take effect; if this is not done before navigating away from the Call View then the tags modifications will be lost.

Reviewing Call Tag Data

1. Call Tag data is available for review in the Call Detail Report as an optional column in the call detail grid. This column will contain a comma separated list of all tags assigned to that call.

2. Call Tag data is also available for review in the Call View, along with all other call details. The '**Call Tags**' section will contain a list of all tags assigned to that call. (See the '**Assigning Manual Tags to Calls**' section for images)

Additional Resources

Using this guide to set up will get you up and running with more streamlined data analysis using Call Tags in a short time.

After applying Call Tagging to your call data, you will begin seeing the endless opportunities to segment your data in ways that truly matter to your business. And one you start to identify patters within your call data we have a number of additional resources to help you further optimize with AI and Machine Learning to take your call tracking program to even higher levels of performance and optimization.

Official Website: Telmetrics.com
Full list of Products and Features: Products
Full list of integrations and partners: Integrations
Learn more about Telmetrics API: Call Tracking API
Full List of Resources: Telmetrics Resources

Our customer service and account management teams are also ready and able to answer any questions, so feel free to get in touch at any time: call us at 1-800-255-3224 or email us at info@telmetrics.com.