



CallRail

A getting started guide to

Creating your first tracking number

Call tracking pinpoints your most effective marketing efforts

Businesses can use call tracking data to measure the success of advertising campaigns and optimize future marketing strategies.

What is call tracking?

Call tracking goes beyond the simple capabilities of caller ID. It is a technology that allows you to gain in-depth information about each individual person who calls your business, including how they found your number in the first place.

How does call tracking work?

Call tracking at the most basic level is pretty simple—it's using a unique phone number for each marketing campaign to tell calls from each campaign apart.



Measure the success of your campaigns

Web analytics makes it easy to see how your online efforts are paying off. But how do you accurately measure your offline conversions? With call tracking, you'll have a reliable way to track all the conversions from your marketing campaigns thanks to campaign level data.

You can place tracking numbers in commercials, billboards, flyers, and other traditional advertising outlets to accurately track the success of your efforts. By measuring this data alongside your online marketing data, you'll have a better idea of which campaigns are yielding the greatest ROI for your business.

In this quick getting started guide for creating tracking numbers, you'll learn about:

Creating + verifying numbers
within your accounts

Installing the JavaScript snippet
to your website

How to test your tracking numbers
once they're created

How to integrate with Google
Analytics + Google My Business

Best practices for analyzing the
data you collect

SECTION ONE

Source-level tracking

Source-level tracking is the easiest way to get started with CallRail.

Source-level tracking is all about knowing which marketing campaigns (either online or offline) are driving the most calls to your business. Use source-level tracking to test your marketing effectiveness, or to A/B test campaigns. For example, will a billboard ad or a Google click-to-call ad cause more customers to call? Tracking sources lets you know which channels provide the most ROI for your marketing dollars.

Source-level tracking allows you to use a unique tracking phone number for each marketing campaign you want to track. For instance, you might want to track calls from Google visitors, a yellow pages ad, and a direct mail campaign—so you'd create three tracking numbers total, one tracking number for each source, and forward each number to your main business phone number.

Whether you advertise online or need a phone number for a work truck, billboard, or business card, you can get an online or offline phone number up and running within minutes.

Online campaign examples:

Google PPC, Yahoo and Bing PPC, organic search results, directory websites, Facebook pages, web referrals, and landing pages

Offline campaign examples:

Yellow pages, direct mail, print ads, TV and radio commercials, flyers and brochures, billboards, and call extensions

When you use a source tracking number, you'll receive the following information about each of your calls:

- Tracking number and name that received the call
- Call's channel or campaign source
- Date and time of the call
- Caller's caller ID information (including name and telephone)
- City where call originated
- Duration of call
- A visitor timeline that includes inbound and outbound calls associated with a caller

As people call your tracking numbers, we'll correlate the marketing campaign with the phone number they called. You'll also receive their caller ID information, as well as a full history of inbound and outbound calls between you and your offline leads.

Prove that your work drives valuable leads.

Tying your phone calls to your online and offline campaigns provides proof that your marketing strategy brings valuable leads to your business. Correlate every phone call with one of your marketing initiatives to pinpoint your most successful marketing channels, and cut your ad spend on campaigns that don't work. These real-time results keep your strategy agile and flexible so you can scale accordingly as your business grows.

SECTION TWO

Creating a new number

CallRail's number creation wizard guides you through creating a tracking number for your campaigns. Each time you create a new number, you'll answer a few simple questions about your campaign. Then, you'll pick your tracking number and configure your whisper message and recording preferences—after that, your tracking number will be active and can start taking calls immediately!

Questions you're promoted with include:

- Where do you want to use this tracking number? Online or offline?
- Where will you display this tracking number?
- What would you like to track?
- Which visitors do you want to track?

Create Tracking Number - CallRail Test Account

10% Complete

Where do you want to use this tracking number?

I'll use it online
Websites, search ads, and more.

I'll use it offline
Print ads, direct mail, and more.

← Back

Online vs. Offline Numbers

An online number (for click-to-call ads, placement on your website, etc.) is useful when you want to track a caller's website activity as well as their calls.

You can create an offline tracking number to track calls and campaigns that aren't on the web. This type of tracking number is often used in print/television ads, direct mail pieces, or in the footer or signature of an email.

Tracking numbers are company-dependent within your account. Use these [instructions](#) as a guide for creating a new tracking number for an online or offline campaign.

Please note, if you use the online option for your tracking number, you'll need to install the JavaScript on your website. For more instructions on the JavaScript Snippet, refer to Section 3 in this resource guide. Offline tracking numbers are configured to not swap on a website where your JavaScript snippet is installed. Check out these [instructions](#) to create an offline tracking number.

Other items to include when creating your new number:

- **Number name:** A brief and memorable name for your tracking number (we recommend naming this after the source or ad type, for example: Facebook Ad). The number name is how your tracking number will appear in your reports.
- **Destination number:** The real-life phone number that will ring when someone calls your tracking number, typically your main business line or your cell phone.
- **Whisper message:** A short message that plays for the call recipient when they pick up the phone; the caller will not hear this message.
- **Call recording*:** Enable call recording for your tracking number, which will record and store all incoming calls to that number. (If you plan on recording calls, we strongly recommend using the automated message feature to provide callers with the [legally required announcement](#) that their call is being recorded.)

**Please note, call recording is free for all CallRail accounts.*

Local vs. Toll-Free Numbers

When selecting your tracking phone number, a selection of tracking numbers local to your area code will display, along with some toll-free numbers as well.

Local tracking numbers ensure your customers know where your business resides. Whether you need tracking phone numbers in your hometown or in another state, we offer phone numbers in more than 300 area codes in the USA and Canada. We will automatically show numbers local to your destination number, but you can also search for numbers in other area codes.

Toll-free tracking phone numbers help you project a national image to your customer without burdening them with long-distance fees. We have thousands of toll-free phone numbers you can purchase to better track your customers nationwide.

Create Tracking Number - Utility

60% Complete

Choose a Phone Number

Numbers in or near area code 404

☒ 404-341-6425

☐ 404-471-3154

☐ 404-948-3427

☐ 404-467-6307

☐ Toll-free numbers (\$2.00 per number per month surcharge)

☐ Numbers in a specific country or area code

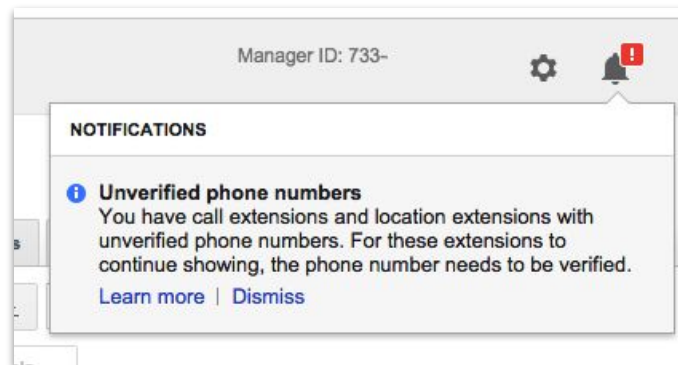
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Number Features →

Verifying Numbers to Track Ad Extensions

If you're interested in setting up a number for a Google Ad extension, you have one additional step to get your number(s) ready to go! If not, feel free to move on to the next section.

Google requires that all phone numbers used in call extensions and call-only ads are verified. You may see a message like this in your Google Ad account:



Google provides two ways to verify your call extension phone numbers:

1. Ensure the phone number used in your extension appears in text on the website featured in your ad
2. Prove that you own your domain by linking your Google Ads and Google Search Console accounts

Tip: The easiest way to verify CallRail phone numbers is to prove ownership of your ad's display URL by linking your Google Ads and Google Search Console account.

Read these [instructions](#) to learn more about verifying numbers and linking your account to Google Search Console and Google Ads.

SECTION THREE

Installing the JavaScript snippet

If you're interested in tracking phone calls that come from your website, you'll want to [install our JavaScript snippet](#) on every page of your website. If you aren't interested in doing this yet, please feel free to move on to the next section.

By adding our code to each page on your website, you're able to capture and relay information about each of your visitors back to you. CallRail's JavaScript snippet allows you to integrate call tracking on your website using dynamic number insertion (DNI). When customers navigate to your website from a marketing campaign, they'll see the correct tracking number based on which marketing source they came from.

The same snippet powers both calls and form tracking if you're using both products in CallRail, so you only need to install the script once. After your company's snippet has been added to each page of your website, you'll be able to capture granular data on where your leads are coming from, including the source.

There are multiple ways you can install the JavaScript snippet, whether it be via Google Tag Manager, our Wordpress and Wix plugins, or manually. If you're using one of these three tools, we highly recommend installing through them as opposed to manually. Use these [instructions](#) to learn how to add dynamic number insertion to Google Tag Manager.

How the JavaScript Snippet Works

Each company in your CallRail account has its own, unique JavaScript snippet. The installation is just like installing Google Analytics—a single JavaScript snippet added to each page of your website before the `</body>` tag. This script tag works for both HTTP and HTTPS pages.

To use the dynamic number insertion feature, create tracking numbers within your CallRail account to track visitors from a specific source, like Google Ads. When a visitor navigates to your website through one of the sources you're tracking, CallRail's JavaScript will detect the phone numbers on your web page and swap them with the correct tracking number. We'll then store the visitor's source in a cookie so they'll continue to see the same tracking number each time they return to your website (unless your snippet is removed).

How to Install the JavaScript Snippet

There are a few important details you'll need to know before you get started with dynamic number insertion:

1. Click [Analytics](#) in the navigation bar on the left.
2. Click [Settings](#) at the top of the page.
3. Choose the company whose JavaScript code you'd like to install.
4. Select [All Integrations](#) from the [Integrations](#) section in the left menu.
5. Choose [JavaScript Snippet](#) from the list of available integrations.
6. Copy the JavaScript provided. It should look similar to the sample to the right:
7. Paste your script into each page of your website right before the `</body>` tag.

Your Code Snippet

```
<script type="text/javascript" src="//cdn.callrail.com/companies/123456789/abcdefghijklmnopqrstuvwxyz123456/12/swap.js"></script>
```


SECTION FOUR

Testing your tracking number

After you've installed the JavaScript snippet on your web page, use these testing methods to check that dynamic number insertion (DNI) is working and tracking numbers are swapped on your web pages.

Auto-Test Your JavaScript Installation

Use this auto-test to confirm that the JavaScript snippet is correctly installed on a web page and dynamic number insertion is functional. This test has two parts. First, it validates that your snippet has been installed in the correct location before the `</body>` tag. Then, it checks that your tracking numbers are swapping on your site.

Tip: You must test each web page individually where you've installed the code snippet.

1. Click [Analytics](#) in the navigation bar on the left, then select [Settings](#) at the top of the page.
2. Choose the company whose snippet installation you are testing.
3. Select [All Integrations](#) from the [Integrations](#) section in the left menu.
4. Choose [JavaScript Snippet](#) integration.
5. Scroll down to the section titled [Test JavaScript Snippet](#) at the bottom of the page.
6. Copy and paste the web page URL that you'd like to test and click [Start Test](#).
7. If your JavaScript snippet is properly installed, you'll see a green checkmark in the [Code Snippet Status](#) section.

If your JavaScript snippet is not found or not properly installed, you'll see a yellow alert with instructions on how to fix your code installation and a date stamp of your last test.

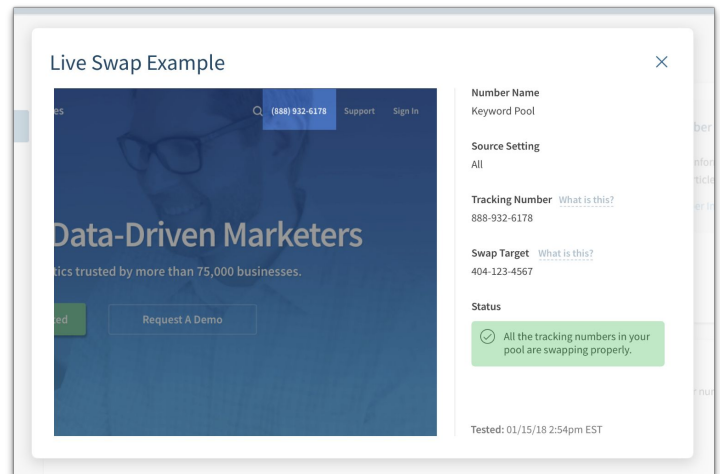
If the code snippet is not in the correct location, your numbers can't swap so the second part of the test will not be performed.

8. In the [Tracking Number Status](#) section of the test, it's important to note that we're testing all the tracking numbers in your company. Some numbers that show up as "not found" are not a problem—only troubleshoot tracking numbers you expected to swap on the page you are testing.

Tracking Number Status What is this?		Status	View
Number Name	Source Setting		
Keyword Pool	All	⚠ Swap target not found. Troubleshoot	
Source Tracker	Direct	⚠ Swap target not found. Troubleshoot	
Source Tracker 2	Landing: callrail.com	✅	👁

9. Tracking numbers that are properly swapping on the page you're testing will show a green checkmark in the Status column.
10. Click the [eyeball icon](#) in the View column to see a live swap example of the tracking number swap on your page.

11. This screen will show a screen capture of the tracking number swap that happened with a date and time stamp of when the swap occurred.
12. There will be a yellow alert message on the Status column for numbers that aren't swapping on the single web page you're testing.
13. If it's a tracking number you expected to swap on the page, click the [Troubleshoot](#) link to view a [help article](#) on troubleshooting common errors that will prevent a number from swapping.
14. You can also select the [Number Name](#) to be sent directly to the edit page for that number so you can make any configuration changes needed.



Manually Test JavaScript Installation

The instructions below cover installation via WordPress, Google Tag Manager, and manual insertion on your site's back-end. Testing is not available for installation via our Wix integration.

You must test each web page individually where you've installed the code snippet. Testing a landing page, for example, will not test your entire site.

1. Click [Analytics](#) in the navigation bar on the left, then select [Tracking](#) at the top of the page.
2. Choose the company whose snippet installation you are testing.
3. Select [Installation Methods](#) from the [Tracking Integrations](#) section in the left menu.
4. Under the [Installation](#) section, select the method by which you installed your JavaScript snippet.
5. Locate the field where you can enter your URL to be tested at the bottom of the section.

Test your CallRail installation by entering your site's URL below.

6. Copy and paste the web page URL that you'd like to test and click [Verify](#).
7. If your JavaScript snippet is properly installed, you'll see a green checkmark in the [Code Snippet Status](#) section.
If your JavaScript snippet is not found or not properly installed, you'll see a yellow alert with instructions on how to fix your code installation and a date stamp of your last test.
If the code snippet is not in the correct location, your numbers can't swap so the second part of the test will not be performed.
8. If you are receiving a negative result but suspect it may be in error, follow these [instructions](#).

Place a Test Call

To confirm everything works as expected, we recommend placing a test call to a tracking number you just created. To do this, use a phone that is different from your destination phone number, such as your cell phone. When you dial the tracking number, the destination phone should start ringing, and you'll know all setup steps were successful!

SECTION FIVE

Turning on call and text notifications

Never miss a lead again.

By turning on notifications, you'll be prepared to respond to every inbound lead within seconds, increasing the chance that you're going to win that business. Get mobile push notifications delivered straight to your phone's home screen so you can close your next deal faster and deliver exceptional customer service from the palm of your hand.

These notifications detail valuable information about callers reaching out to your business, including their name and the campaign that brought them to you.

First, you'll want to create notifications for incoming calls and text messages to your tracking numbers. You can customize your notifications to receive alerts about specific interactions with calls, like missed calls, voicemails, first-time callers, or calls matching a specific tag. You can also choose the alert type, including email notifications, live desktop browser notifications, or push notifications delivered to your cell phone through CallRail's mobile app.

Desktop notifications will appear in the top right-hand corner of your browser. It is important to note that you'll need to have CallRail open in your browser to see desktop notifications.

If you have created an email notification for calls to your tracking numbers, to the right is an example of the data you'll receive in the notification.

Use these [instructions](#) if you'd like to create a desktop, text message, or email notification for yourself or another user on your account.

Create Notification

Which company is this notification for?
All Companies

Which user should receive this notification?
Sam Wade

Your notification will be sent to the email address below.
swade@example.com

Which interactions do you want to be notified of?
☒ Calls
☒ Texts

Customize

Create Notification

How would you like to be notified?
☒ Email
☒ Desktop Push Notification

Back

Save

New voicemail for Boost Marketing!

Left by 404-555-1234 via April Campaign
New Caller • Message lasting 24 seconds

View Details Call Back

Is this a qualified lead?

☒ ☐

Caller Timeline

Caller Name	Marks, Esther
Caller Number	404-555-1234
City	Atlanta, GA
Date	Apr 14 at 6:36 AM EDT
Duration	30 sec

Tracking Details

Number Name	Sam's Website
Tracking Number	888-222-2222

SECTION SIX

Integrating with your Google platforms

Google Analytics

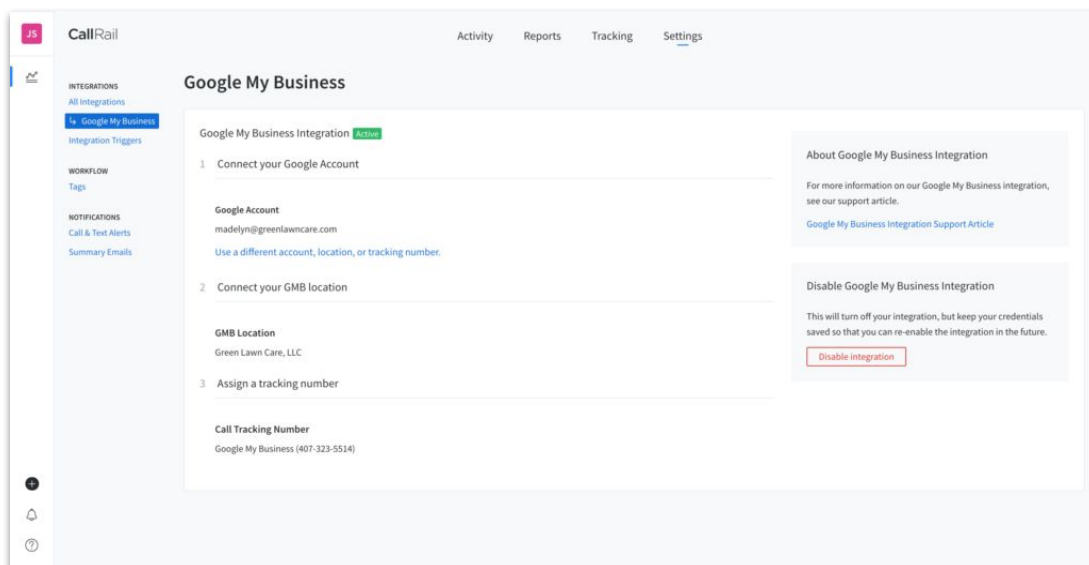
Google Analytics gives you insight into how your visitors find and interact with your website. CallRail integrates with your existing Google Analytics account by sending your call, text, and form submission data to goals you've created in Google Analytics.

CallRail's integration with Google Analytics is company-dependent in your account. Follow these [instructions](#) for each company you'd like to integrate with Google Analytics.

Google My Business

Google My Business (GMB) is a free platform that helps any business take control of their local search presence, which is especially helpful for small businesses—an attractive GMB listing can play a major role in a lead's final decision. Every business that serves a specific geographical area can set up a GMB listing. These listings display on search results pages and Google Maps when someone searches for your business or for keywords that you rank high for.

This integration lets users automatically insert a call tracking number into their GMB listing, so the valuable information on leads they'd get from any other source can now come from their listing as well. The integration even lets you keep your main business line as a secondary number to maintain NAP consistency.



Read these [instructions](#) for more information on setting up your Google My Business integration in CallRail.

SECTION SEVEN

Viewing the data

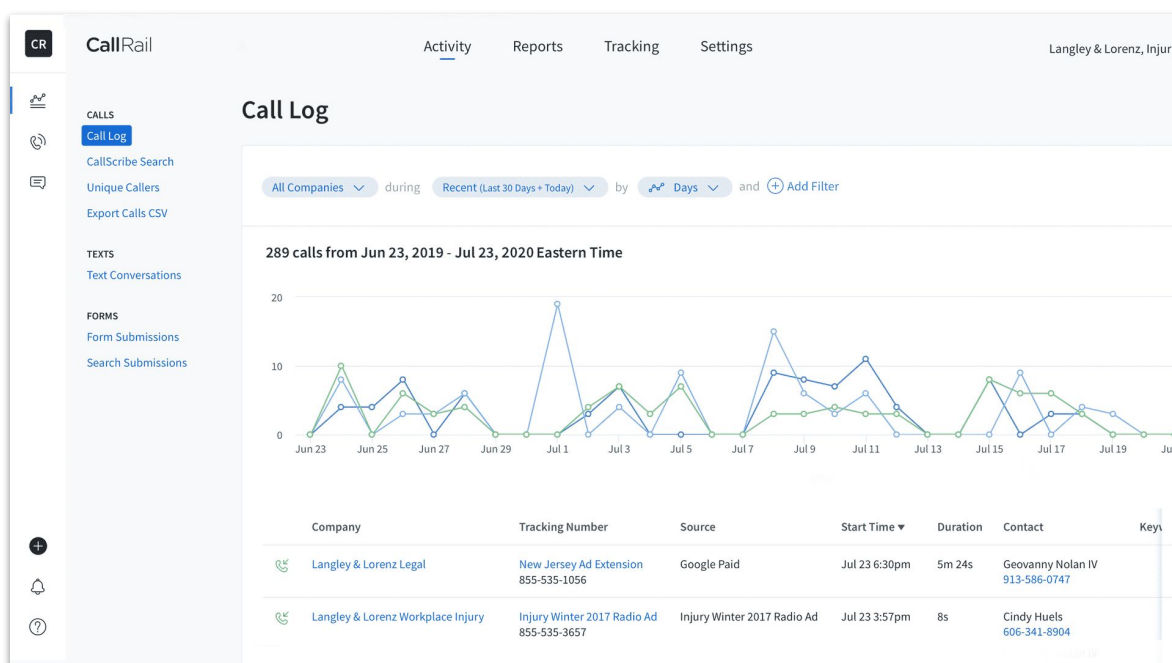
Call Log

Once you've set up your tracking number and placed a test call, the next place you'll want to go is your Activity tab so you can see where your data will live once you start getting calls to your tracking number.

Use the Call Log to filter, find, and export calls that are most meaningful to your business, or to generate a list of calls for a specific date range.

The Call Log offers a convenient way for you to follow your tracking numbers' activity, allowing you to pinpoint key call information using customizable insights. Through this, you can learn more about when and how calls are making an impact on your bottom line.

- See which calls were detected as good leads to stay focused on customers ready to convert
- Listen to call recordings and categorize the calls using tags to convey the caller's intent to the rest of your team
- Discover which PPC keywords and marketing campaigns brought the caller to your business
- Compare data across different date ranges to discover trends in one central and convenient location

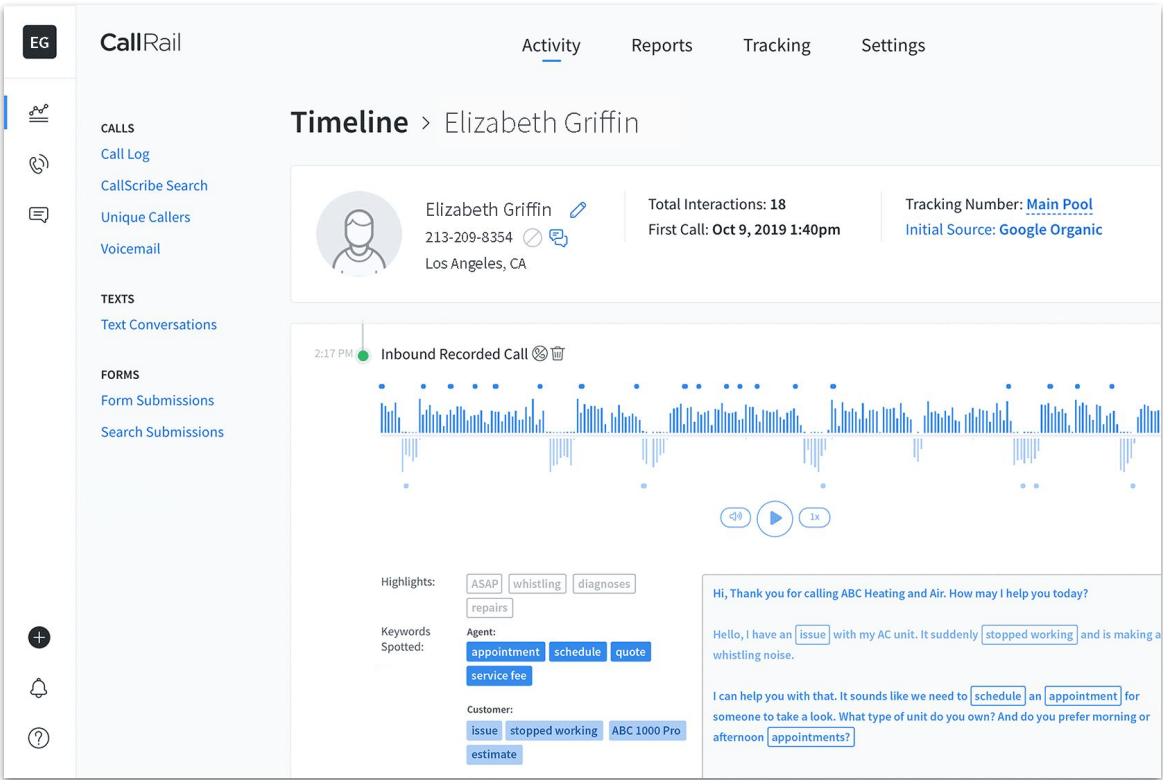


Use these [instructions](#) to create a report that identifies the types of calls made and received by your tracking numbers within your Call Log.

Visitor Timeline

With the Visitor Timeline, you can view all interactions each unique customer has engaged with online and offline—including campaign, ad, and keyword data to better understand campaign performance and to optimize accordingly. Data and conversations are unified, giving you the ability to drill into the associated call (or form submission) to unlock person-level insights.

The visitor timeline includes both inbound and outbound calls associated with each caller.



SECTION EIGHT

Reporting with CallRail

Using Filters to Customize

CallRail's filters allow you to pick the type of calls you'd like to display on your activity dashboard or within your reports. These filters allow you to access granular data about your calls so you can see the most pertinent data set, no matter which filters you'd like to use—you can also save filters to easily find calls that fit specific criteria at any time. For example, you can pick a particular business and your preferred date range to filter by.

To get started with activity and report filters, check out these [instructions](#). Additionally, we've included a few examples below of our most popular reports, but for more information on other reports we offer, follow these [instructions](#).

Call Attribution + Text Attribution Reports

The Call Attribution report provides insight into the sources and interactions that are driving traffic and generating calls. The Text Attribution Report provides insight into the sources and interactions that are driving traffic and generating text messages.

Use these [instructions](#) to access your Call Attribution report for a specific company and these [instructions](#) to view your Text Attribution report.

Missed Calls Report

Get details on the number of missed calls on each day of the week, as well as within each hour in a day. You can use this report to understand your peak call times and to ensure calls are being answered accordingly.

CallRail defines a missed call as any unanswered calls, automatically detected voicemails, or calls received by a voicemail step in the Call Flow Builder. A call answered by a phone system outside of CallRail is considered an answered call. Any call answered by a person or an automated system in which the customer didn't leave a voicemail is also considered an answered call.

Use these [instructions](#) to access your Missed Calls report for a specific company.

