CallRail

A getting started guide to

Tracking your online marketing efforts

Capture full session data for callers

Call tracking is all about helping your business get accurate data for how new leads find you before they pick up the phone to call. Customers rarely answer the classic "How did you hear about us?" survey accurately, or they'll often provide unhelpful answers like, "I found you on Google." Without some form of call tracking, it's hard for businesses to prove which marketing campaigns (online, offline, or both) are providing the best ROI.

While call tracking can seem complex at first, the premise is simple: There's a number the customer dials (the tracking number), along with a number to which their call is forwarded (the destination number). By analyzing which of your tracking numbers your customers call, **you can know with certainty how they're finding you.**

CallRail offers two kinds of call tracking

Each of these call tracking methods provides slightly different sets of data. *Source-level tracking* comes standard with every CallRail account, and is part of our baseline technology. (You can read more about it in our resource guidebook for creating your first tracking number.

Visitor tracking is the second type, and is best for companies that want user-specific data and more insight on how their search terms, bids, and website pages are performing.

In short, source tracking is a way to test your overall campaign effectiveness, while visitor tracking helps better illuminate the individual paths-to-purchase taken by customers.

There are several advantages to having visitor tracking data in your CallRail reporting. First, you can refine your web design based on how new customers navigate your site and the pages that are driving the most call conversions. Second, keyword data helps you improve your search engine bidding strategies because you can see which search terms your customers use. Visitor tracking also stores the full visitor path in a caller timeline that you can view before, during, or after a call.

In this quick getting started guide for tracking your online marketing efforts, you'll learn about:

What visitor tracking is and how to create a website pool

How dynamic number insertion works

Steps to test your tracking numbers once they're created

Turning on call and text notifications

Integrating with Google Analytics, Google Ads, and Microsoft Ads

Best practices for analyzing the data you collect

SECTION ONE

Visitor tracking

Visitor tracking is dynamic.

With visitor tracking, you can track the full visitor journey as the users navigate to, from, and around your website. Visitor tracking is also the only way you can see conversions in Ads, matching call conversions to your keyword bids.

The foundation of visitor tracking is a pool, or group, of telephone numbers that belongs exclusively to your business. Every time a visitor arrives on your website, we assign them a phone number from your pool. The visitor sees this phone number the entire time they're on your website. Each phone number is assigned to one visitor at a time, so you can link calls directly to individual visitors.

When your business receives a call via a number in your pool, CallRail knows which visitor it was assigned to, and we associate that call to the source and keyword the caller used to find your business. When the visitor is finished browsing your website, we free up that phone number so it can be assigned to another visitor. You'll know which marketing sources are driving valls, and you'll be able to drill down to the individual search keyword level and link calls to specific web visitors and their actions on your site.

You'll be able to track multiple sources using your website pool:

All website visitors	Track every visitor to your website, regardless of the marketing source
Google Ads	Track only visitors who come to your website from Google Ads campaigns
PPC Search	Track only visitor from your Google, Bing, and Yahoo Ads
Landing Page	Track only visitors who land on a specific page on your website
Referring Page	Track only visitors from a specific website, like yelp.com
All Except Direct	Track all website visitors except for those who enter your website URL and navigate to your site directly
All Except Direct + Organic	Track all website visitors except for those who find your website through organic search engine results or by typing in your website's URL and navigating to your site directly

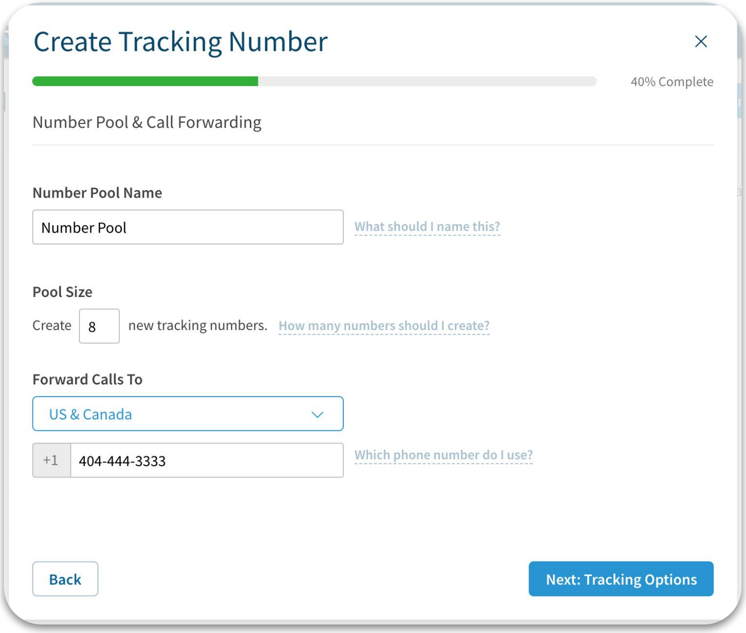
Available data from visitor tracking includes: source type (Google PPC, Google Organic, referrals from Yelp, etc.), keywords (for all PPC, including Bing and Yahoo calls), landing page, active page (the page the phone call was placed on), complete page view history of the caller, referring domain, medium, tracking number called, data and time of the call, caller ID, city, duration of call, device type, and any ValueTrack and/or UTM parameters configured for your ad campaigns.

Follow these steps to create a website pool.

Ensuring that visitors see a unique phone number from the pool placed on your site is crucial to the validity of your data. For this reason, your pool needs to contain enough numbers to cover all of your site's visitors that you'd like to track. When creating a website pool, the minimum requirement is four (4) numbers (additionally, your website pool can be either local or toll-free numbers). The minimum is used to reduce the likelihood of a visitor-to-call misattribution.

By using Google Analytics to view your site's traffic, you can use the following rule to decide how many numbers should be in your pool: **the number of peak hourly pageviews divided by four equals the size of your pool.**

For more details on assessing website pool size, please see this help article.



A few things to note:

- A website pool is required to report on calls by PPC keyword or to send call conversions to ad platforms like Google Ads
- One website pool is allowed per company. If you'd like to add more than one website pool per company, please contact our Support team, as this is something we'll take care of on our end
- If you're currently using source-level tracking, read these instructions to better understand how to transition from source-level tracking to visitor tracking

Implementing visitor tracking only takes a few minutes. Once you've created a website pool, add your company's JavaScript snippet to your website to enable dynamic number insertion (DNI), and we do the rest. (If you're already using our source-level dynamic number insertion on your website, it's the same code, so you're all set. If not, visit the next section to learn more about dynamic number insertion.)

SECTION TWO

Dynamic number insertion: the core of call tracking

The ability to swap your phone number with a tracking number from your number pool is done through dynamic number insertion. In order for dynamic number insertion to swap a number on your website, you'll need to have the following in place on your website:

- A visible telephone number within HTML or an image
- A telephone number in one of the following formats: 111-222-3333, 111.222.3333, or (111) 222-3333

Your website visitors will see the same tracking phone number each time they come to your website in the future—this ensures there is no confusion if they're visiting your site from a different source than they did the first time. We do this by placing a cookie on their browser that recognizes them when they return, showing the same local or toll-free tracking phone number they saw the first time.

How dynamic number insertion works

First, install CallRail's JavaScript snippet on your website. Each company in your CallRail account has its own, unique script for call tracking.

Then you'll create tracking numbers within your CallRail account to track visitors from single sources with source tracking or all sources using a website pool of tracking numbers.

Dynamic number insertion only take a few minutes to install. However, there are several ways you can install dynamic number insertion on your website:

1. Install the JavaScript snippet directly to your website
2. Use CallRail's WordPress plugin
3. With Google Tag Manager

SECTION THREE

Testing your account

After you've installed the JavaScript snippet on your web page, use these testing methods to check that dynamic number insertion is working and tracking numbers are swapping on your pages. Make sure you clear your cookies or enable private browsing on your web browser—this will give the appearance that you are a new visitor to your site.

Manually test dynamic number insertion

Use these test methods to manually test dynamic number insertion. Because CallRail's swap code creates a cookie that remembers your previous website visits, you might think that dynamic number insertion isn't working, even when it is.

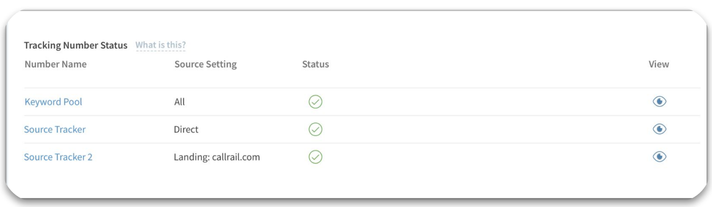
1. First, clear your cookies.
2. Simulate an organic visit.
3. Simulate a Google Ads click.
4. Simulate a Bing Paid click.
5. Mimic mobile devices.

Check out these detailed instructions on how to manually test dynamic number insertion.

Auto-test dynamic number insertion

There are two parts to auto-testing dynamic number insertion. First, it validated that your code snippet is installed in the correct location on your webpage. Then, it checks that your tracking numbers are dynamically swapping on your page. You can access the auto-test by clicking the 'Settings' tab and selecting 'JavaScript snippet' icon and scrolling down.

Part 1: This test checks that your company's code snippet has been installed in the correct location before the </body> tag and has no formatting errors. Without the code snippet installed correctly, your tracking numbers cannot swap.



Part 2: The second part of the test will check that your numbers are swapping correctly. It's important to note that we're testing all the tracking numbers in your company in this part of the test. So, some numbers that show up as "not found" are not a problem. Only troubleshoot tracking numbers you expected to swap on the page you're testing.

To learn more about auto-testing dynamic number insertion, check out these instructions.

Place a test call

After you've tested your dynamic number insertion, either manually or automatically, we recommend placing a test call to the tracking numbers you just created to confirm everything works as expected.

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 FOUR

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.

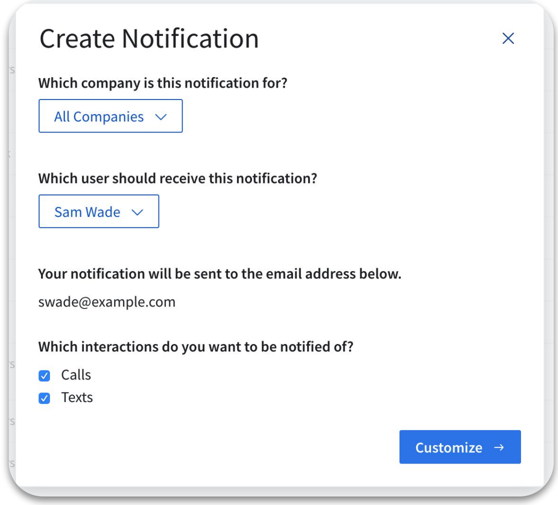
First, you'll want to create notifications for incoming calls and text messages to your tracking numbers. You can customize your notifications to receive alerts about specific interactions with calls, like missed calls, voicemails, first-time callers, or calls matching a specific tag. You can also choose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

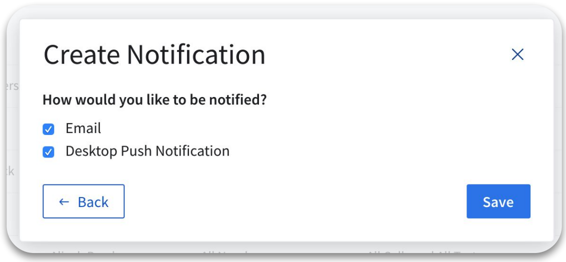
Desktop notifications will appear in the top right-hand corner of your browser. It is important to note that you'll need to have CallRail open in your browser to see desktop notifications.

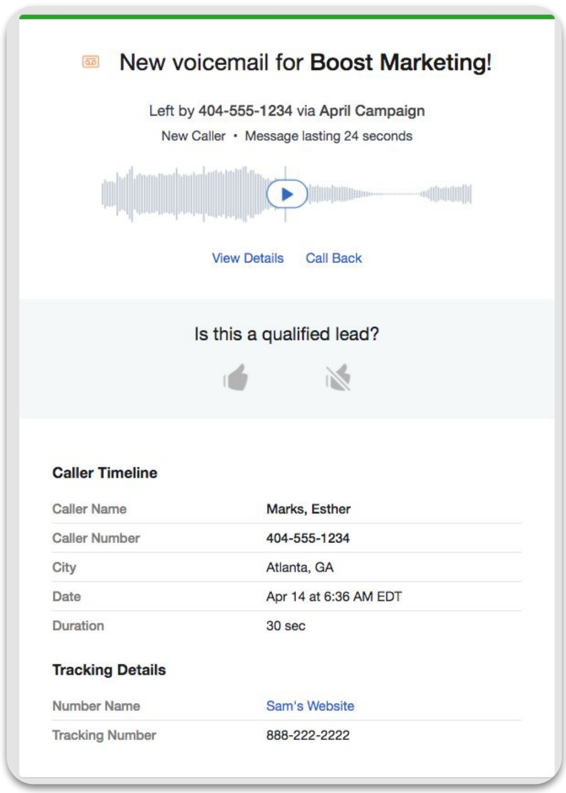
If you have created an email notification for calls to your tracking numbers, to the right is an example of the data you'll receive in the notification.

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

Additionally, you can send an automated text message to someone whose call you missed. CallRail's Automated Response feature is commonly used to let a customer know when they can expect to hear from you if you weren't available to speak with them when they reached out to your business. Check out these [instructions] to learn more about automated responses.







SECTION FIVE

Integrations

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.

Our Google Analytics call tracking integration offers a more complete way to report and analyze information in Analytics, giving you more insight into visitor interactions than ever before. The integration is quick and easy to set up, and will give you the actionable data you need to help make important decisions about your marketing strategies.

With our Google Analytics integration, you can:

- set up goals for calls, texts, and forms, and track them as conversions
- create advanced segments for "callers"
- use phone calls as a stage in multi-channel conversion funnel

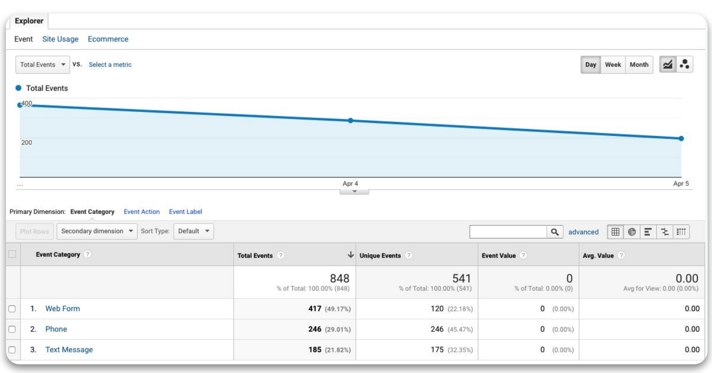
Follow these instructions for each company you'd like to integrate with Google Analytics.

Setting up Goals

Goals track actions that affect revenue. They are an indicator of a site visitor converting into a customer, hence their activity being known as conversions. These include reaching a specific place on your site, like a checkout page. These can be seen in the Conversions reports in your Google Analytics account.

Events track user behavior, and are not dependent on a certain page of your site being reached. Examples of an event include button clicks and video views. These can be seen in the Behavior reports in your Google Analytics account, such as the Top Events report. After you activate your integration in CallRail, you'll want to add your goals to Google Analytics—this is where we report your data. The goal setup you use depends on the type of interaction you'd like to track: call, text, form, or chat goal.

- **Creating call goals**: Use these instructions to create a call goal that reports all calls received by each tracking number in the company you've integrated with Google Analytics
- **Creating text goals**: Use these instructions to create a text message goal that reports all text messages received by each tracking number in the company you've integrated with Google Analytics
- **Creating form goals**: Use these instructions to create a form goal that reports all form submissions received by the company you've integrated with Google Analytics
- **Creating chat goals**: Use these instructions to create a chat goal that reports all chat conversations received by the company you've integrated with Google Analytics



Google Ads

Tracking calls as conversions within Google Ads helps you measure the full effectiveness of your pay-per-click (PPC) campaigns. CallRail's direct integration with Google Ads sends customer calls straight to your Ads account, making it easier than ever to align campaign clicks with individual phone calls.

Our integration also allows you to measure the ROI and effectiveness of your Google Ads campaigns by attributing phone leads at the source, campaign, ad group, and keyword level via the Google Ads API. By hooking directly into Ads, CallRail simplifies Ads call tracking and offers users a real-time solution.

Using CallRail's visitor tracking, a website visitor's source can be accurately determined and assigned to a unique number via dynamic number insertion. When your visitor calls this phone number, the CallRail system captures and displays: call time, PPC campaign, caller ID information, geographic location, last page visited, and detailed call conversion tracking data on your selected AdWords campaign.

Seamlessly link your CallRail and Google Ads accounts to:

- measure and optimize ROI for your search efforts with access to detailed phone call data
- track phone calls from Google Ads PPC at the source, campaign, ad group, and keyword level
- send accurate phone call data to Ads in real-time via CallRail's direct connection to the AdWords API
- identify your most effective landing pages for generating phone call leads

To learn more about integrating CallRail and your Google Ads accounts, check out these instructions. And to learn how to report on calls by keyword in Google Ads, follow these steps.

Microsoft Advertising

CallRail's Microsoft Advertising integration allows you to track which keywords and campaigns are resulting in the highest-quality conversions. With CallRail and Microsoft Ads, you'll gain a complete view of your online PPC and website campaigns, alongside offline call and text data to really see what's driving the best leads.

By integrating Microsoft Advertising and Callrail, you can:

- discover how many calls and texts your Microsoft Ads are driving
- view online and offline attribution data within a single platform
- have a holistic view of a buyer's cross-platform journey
- gain access to real-time call and text reporting on your conversion from Microsoft Paid Search campaigns
- track phone call and text conversions from your Microsoft ads down to the keyword and campaign level

Follow these instructions for each company you'd like to integrate with Microsoft Advertising.

SECTION SIX

Viewing the data

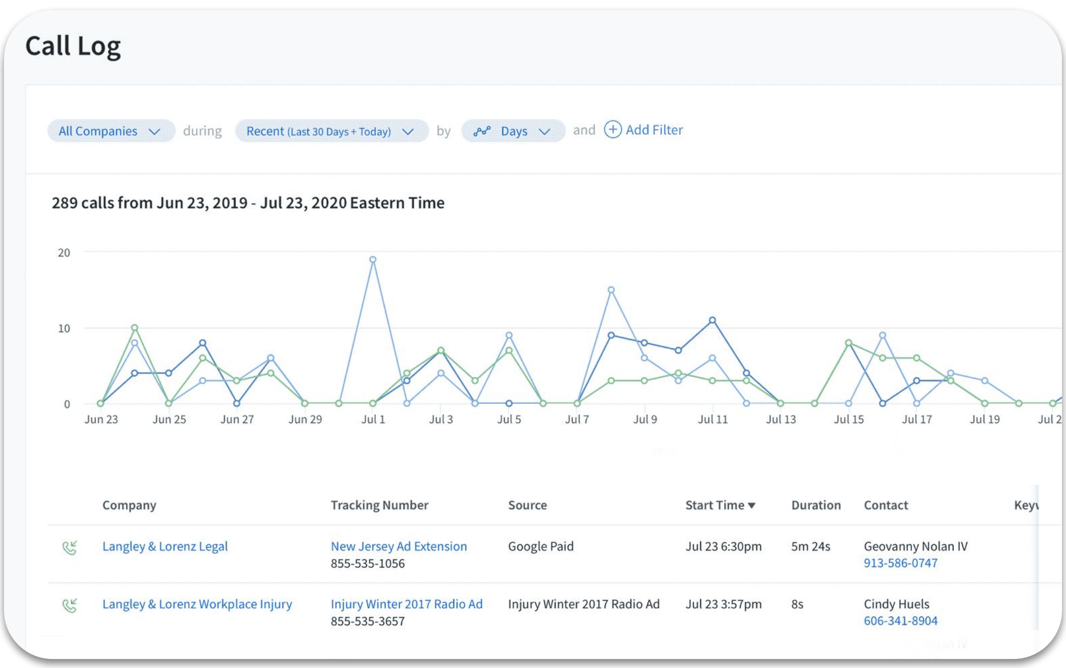
Call Log

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

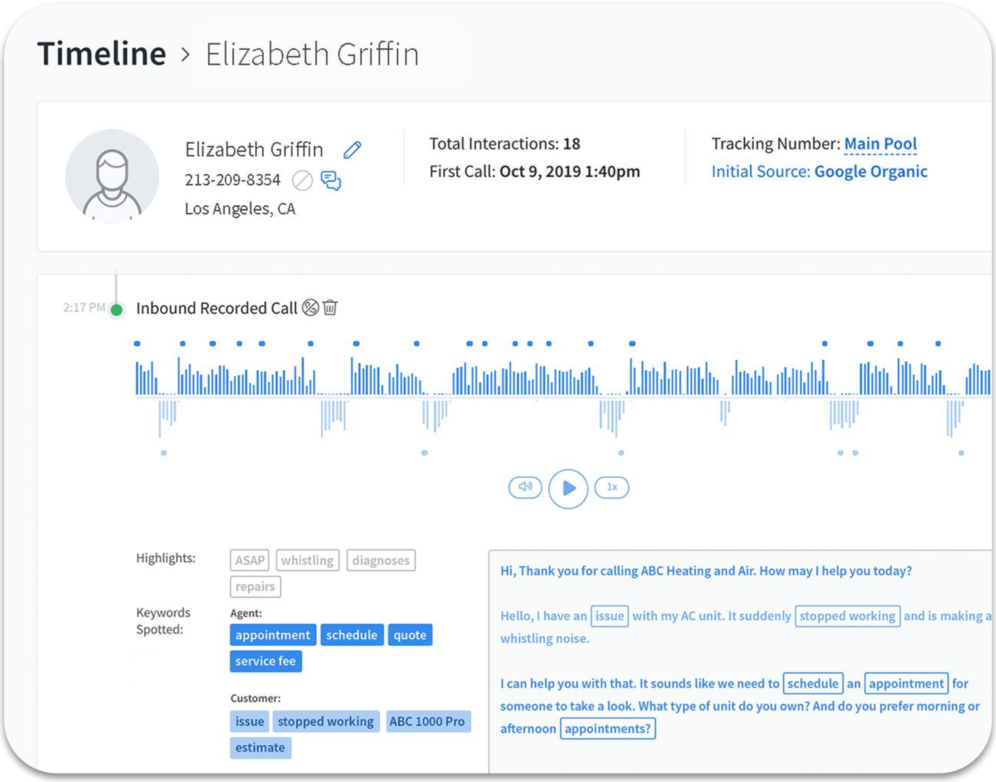


Use these [instructions](#) to create a report that identifies the types of calls made and received by your tracking numbers within your Call Log.

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 SEVEN

Reporting with CallRail

With CallRail's robust reporting capabilities, we'll give you details that empower you to make smart marketing choices. Below are ways to increase efficiencies and drill down into details of your reports, and some of our popular call reports.

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.

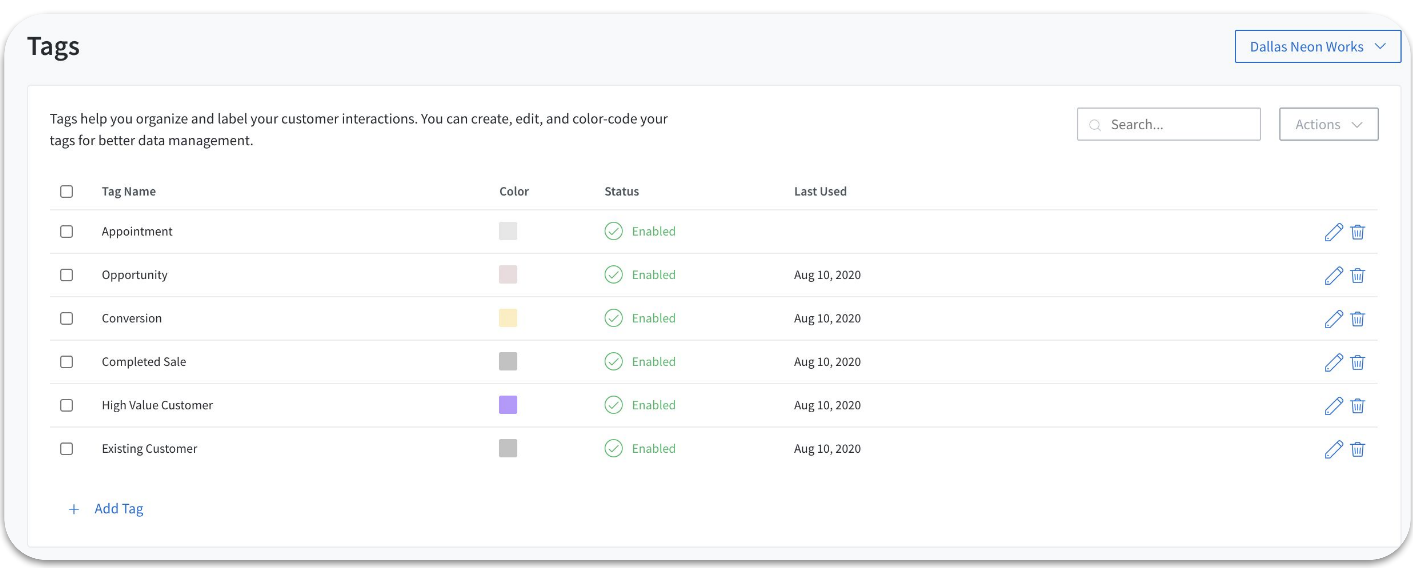
To get started with activity and report filters, check out these instructions.

Tags

Tags are a helpful way to sort and categorize your calls (and form submissions). Each company in your account has its own set of tags that can be created, edited, and color-coded to help you sort your data faster. There's no limit on how many tags you're able to add to a company. You can also assign multiple tags to a single call (or form).

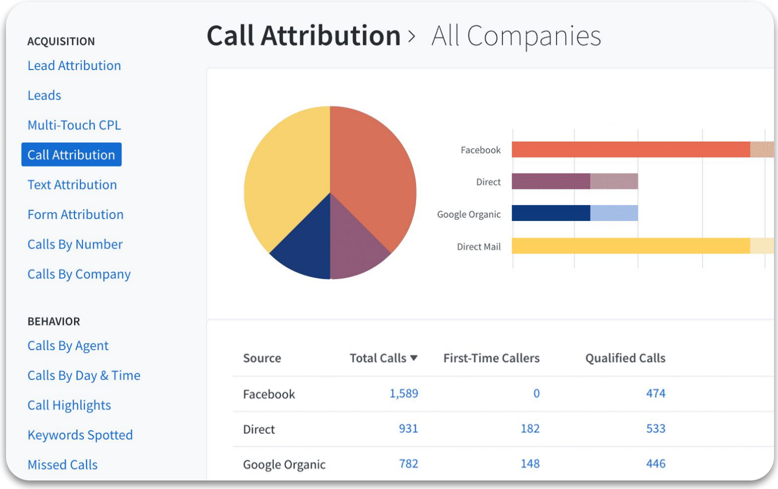
Color Coding Tags: Applying colors to each of your tags lets you quickly differentiate between the types of calls and forms you receive. By default, the background color of any tag is gray, but you can choose different colors for each set of tags in each company. Once a color has been assigned to a tag, all assigned tags will update to reflect the new color.

Follow these instructions to learn more on configuring tags.



Call Attribution Report

The Call Attribution report provides insight into the sources, campaigns, and keywords behind your phone calls. With this report, you can review your online and offline analytics and conversions to fully understand the successes of each campaign. This allows you to completely tailor your marketing strategies based on real results.



You can view by source, campaign, keywords, referring page, and landing page. When CallRail shows marketing attribution data, typically the contact's First Touch milestone is represented—this means how a contact engages with your company for the first time is captured in your reporting.

Use these instructions to access your Call Attribution report for a specific company

Calls by Tags Report

With the Calls by Tag report, you'll learn which tags are most popular within your call volume, and you can use the discoveries to spot important trends about your business's performance.

For example: You can use this setup to create a report that shows the total number of calls involving your enabled tags for any tracking number in any company. The table that's created for this kind of report includes the total number of calls involving specific tags, as well as a breakdown of how many of those calls were answered, missed, first-time, etc.

Check out these instructions to create a report that identifies the types of calls involving enabled tags.

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.

Use these instructions to access your Missed Calls report for a specific company.