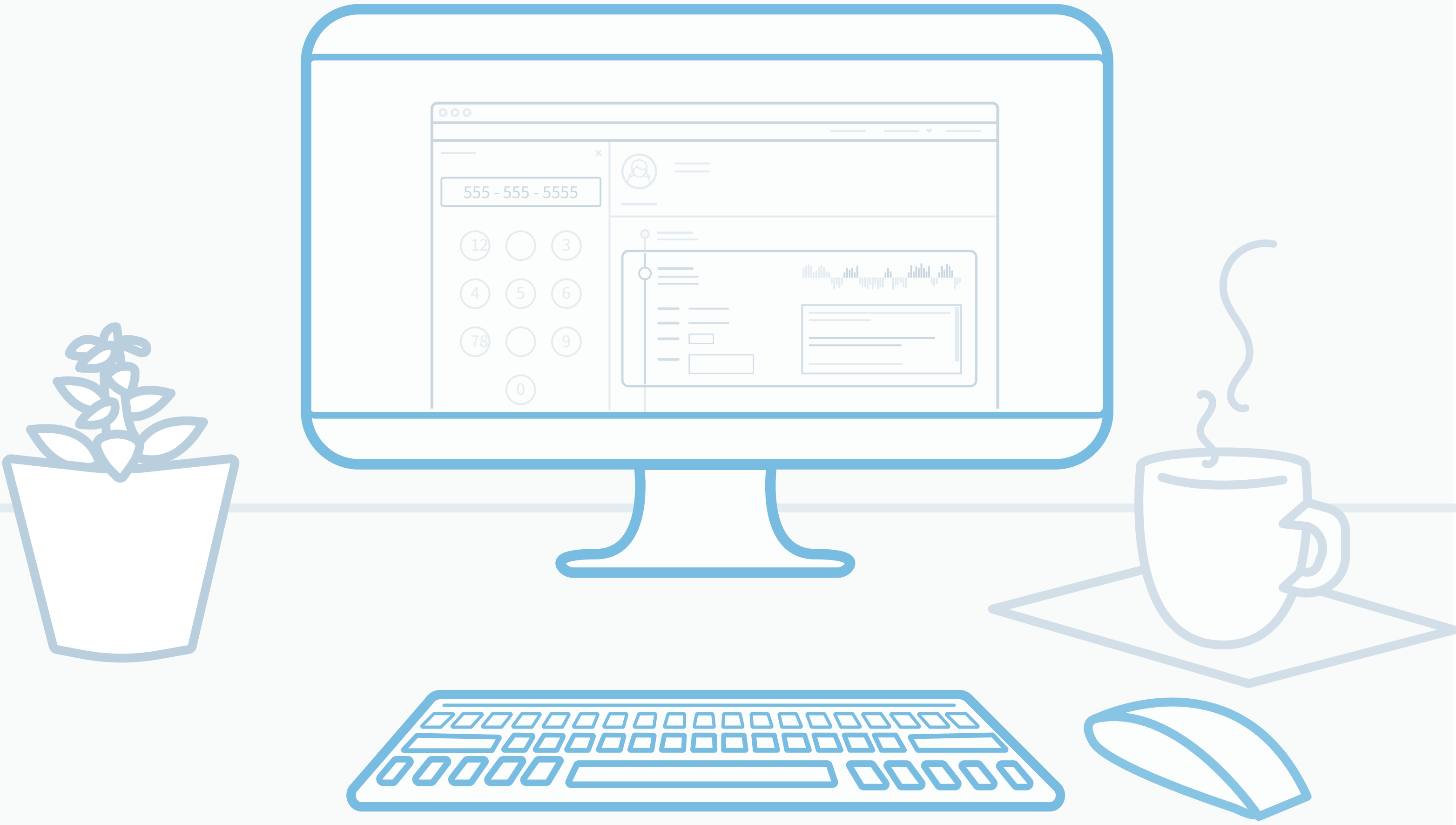
Getting Started with CallRail

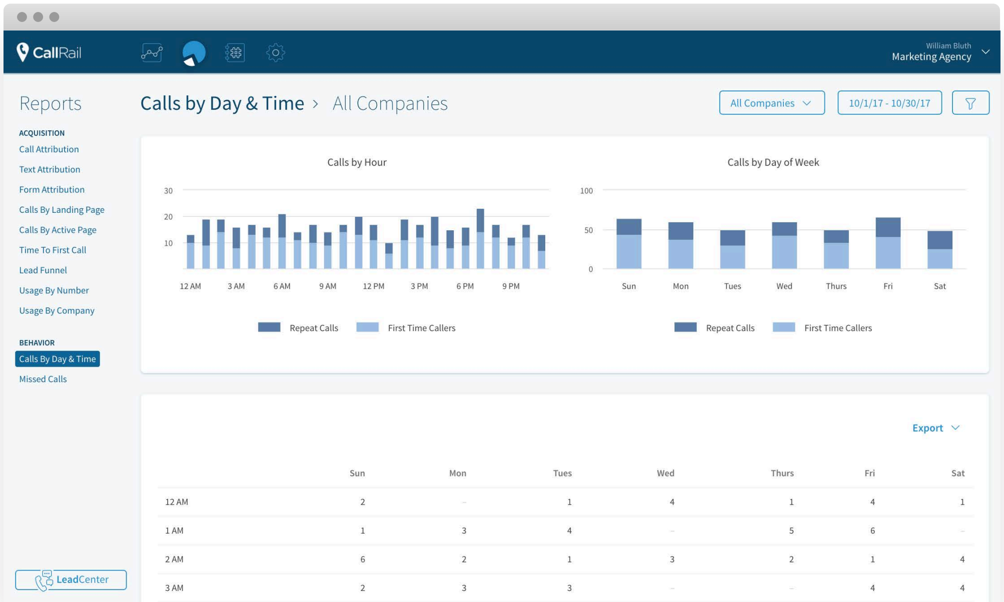


Summary

Call tracking is simple and easy with CallRail. This guide will help you set up your CallRail account and configure your first tracking number. We'll also cover how to review your analytics, touch on some of our automation features, and provide some account management best practices.

This is a general guide to getting your CallRail account up and running, if you have questions or issues that aren't covered here we recommend checking out our searchable online help center, or contacting our support team.

We also have an online community forum to trade tips and best practices with other CallRail customers at community.callrail.com.

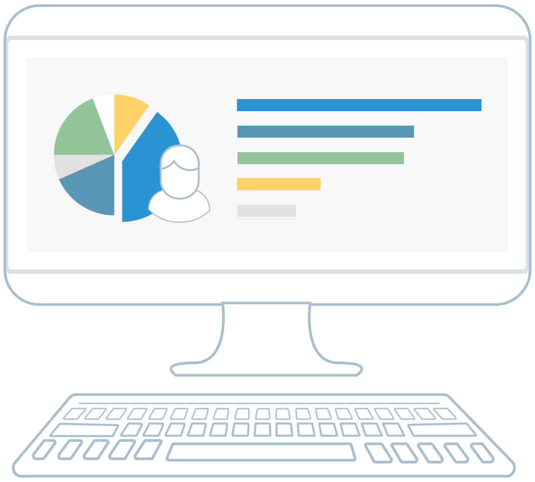


	Sun	Mon	Tues	Wed	Thurs	Fri	Sat
12 AM	2	-	1	4	1	4	1
1 AM	1	3	4	-	5	6	-
2 AM	6	2	1	3	2	1	4
3 AM	2	3	3	-	-	4	4

Table of Contents

The Essentials

CallRail is a browser-based web application, so you don't need to install any extra programs or software to get your account up and running -- as long as you have Internet access, you can use CallRail. Before you start, make sure that your web browser is updated to the latest stable (non-beta) release, and that JavaScript, Adobe Flash and cookies are enabled.



Create Your CallRail Account

If you don't have an account already, start by doing the following:

1. Go to https://www.callrail.com/pricing/ and click on the "**Start 14-Day Free Trial**" button under your preferred account type. Fill out the next few prompts with your business contact info. (No credit card required!)

2. Once you're finished and your account is created, we'll automatically log you in so you can get started.

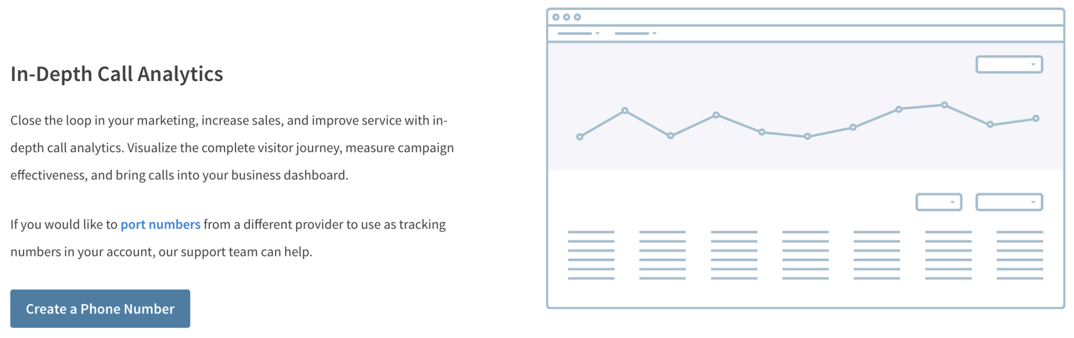
3. For users outside of the U.S. and Canada, please be sure to contact our support team so we can enable international features for your account.

Create a Tracking Number

If you're logging in for the first time, click on "**Create a Phone Number**". You'll then see a setup wizard prompting you to create a tracking number for your account -- these are the unique phone numbers generated for your account that are used to track inbound and outbound calls. If you already have an account, click the "**Numbers (#)**" tab at the top of the CallRail page after logging in, and then click the "**Add Phone Number**" button at the top-right of the next page.

Our setup wizard will ask you some questions to help determine which type of number you need: An **Offline Number** (for direct mailers and television ads) or an **Online Number** (for PPC ads, placement on your website, etc.). Online Numbers are useful when you want to track a caller's website activity as well as their calls, while Offline Numbers are better suited for tracking broader per-campaign call volume.

Once you've completed the setup wizard, you can proceed with configuring the number.



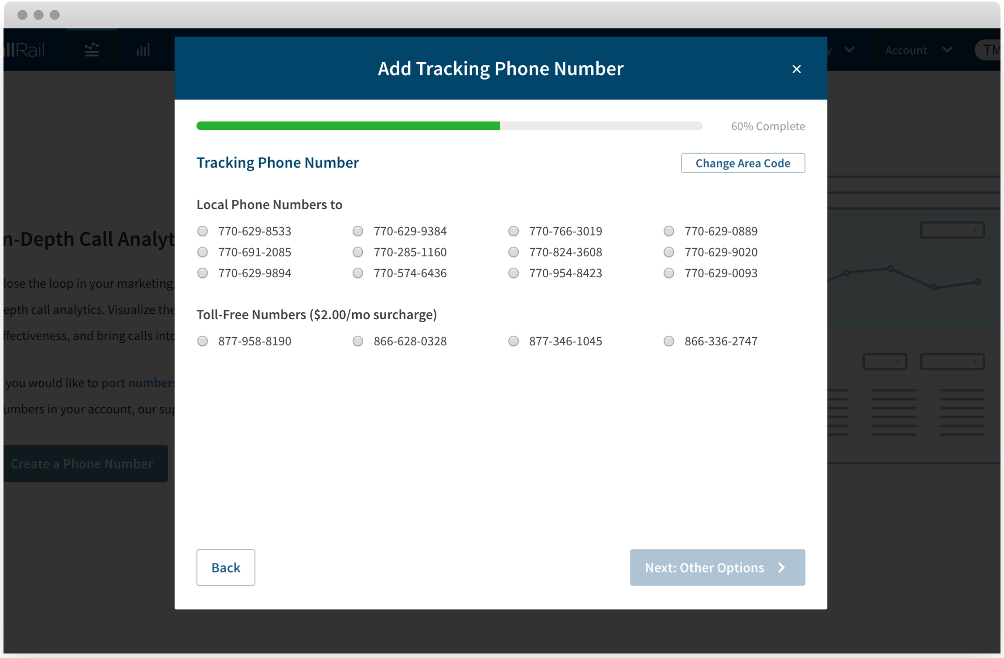
1 Select a **Country** for your number, which will determine the location of your number and its available features. Then add a **Name** for how the number will appear in the app and its associated reports. Finally, specify the **Destination Number** -- this is the real-life phone number that will ring when someone calls your tracking number.

2 Select your **Tracking Source** -- If you're using dynamic number insertion to track each visitor according to the channel by which they arrived, you can specify a tracking source for your number to pair it with a specific channel.

For example, if you want CallRail to dynamically display this number to visitors who arrive at your site through Google AdWords, select the "Google AdWords" option for this number's tracking source.

Contine to next page...

3 Select your **Tracking Phone Number** -- Next, we'll display a selection of tracking numbers local to your area code, and some toll-free numbers as well. Pick the tracking number you'd like to use from the pool generated here. (If you'd prefer a tracking number in a different area code, click the "Change Area Code" button.)



Continue to next page...

4 Optionally, you can also configure a **Whisper Message** and **Call Recording** for your tracking number. A Whisper Message is a short message that plays for the call recipient when they pick up the phone; the caller will not hear this message.

You can also 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.)

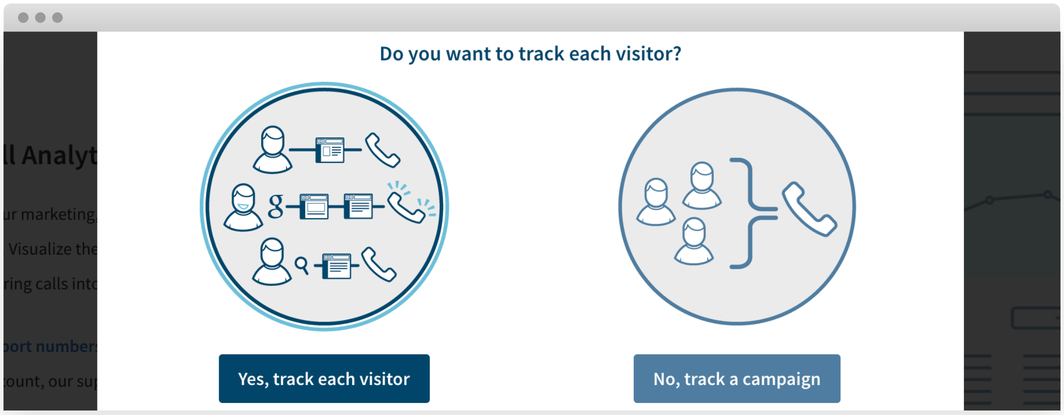
5 Once these steps are complete you can **Activate your Tracking Number**, after which it can immediately start taking incoming calls. Test it out yourself by dialing your tracking number; once the call is complete, navigate to the main CallRail dashboard to view the analytics and data for the test call you just placed.

**** A Note on Dynamic Number Insertion **** You can dynamically display different phone numbers to website visitors based on the ad channel that brought them there by configuring dynamic number insertion (DNI) for your account. This an advanced feature that requires you to publish a snippet of JavaScript code on the landing page where your tracking number is displayed -- check out our help guide on DNI for further guidance on this process.

Congratulations, you just configured your first tracking number! Give your nearest coworker a high-five (or give yourself a well-deserved self-five).

Tracking by Source VS Tracking by Keyword

By default, your Tracking Numbers are paired with a specific campaign or channel, allowing you to measure how many calls this channel is driving -- this is known as **Source-level Tracking**. However, you may also want to retrieve the associated search and keyword data for your calls, view a caller's previous activity on your website, or view your calls properly categorized as conversions in Google AdWords. For this, you'll instead need to use **Keyword-level Tracking**.



With keyword tracking, you're assigned a pool of Tracking Numbers that are unique to your account. Every time a visitor arrives at your website, they'll be assigned a number from this pool, and the visitor will see this same number every time they return to your site. Since each number is assigned to one visitor at a time, CallRail can link calls directly to a visitor and their relevant web history. This provides deep, actionable insights into the steps that led to them placing a call.

If you've already added the JavaScript code for Dynamic Number Insertion to your website then most of the heavy lifting is already done -- check out our Help Center documentation on setting up a keyword pool for a complete guide on enabling this feature.

Creating Companies
(Sub-Accounts)

If you're an agency managing a CallRail account on behalf of several different clients, or if you'd like to create sub-accounts for each of your organization's different departments or franchises, you'll want to create **Companies** in your CallRail account.

In CallRail, a Company can be thought of as a separate sub-account operating under your account's main umbrella. This is a great way to compartmentalize your account according to the needs of each user or client, so they'll only have access to relevant data and reports.

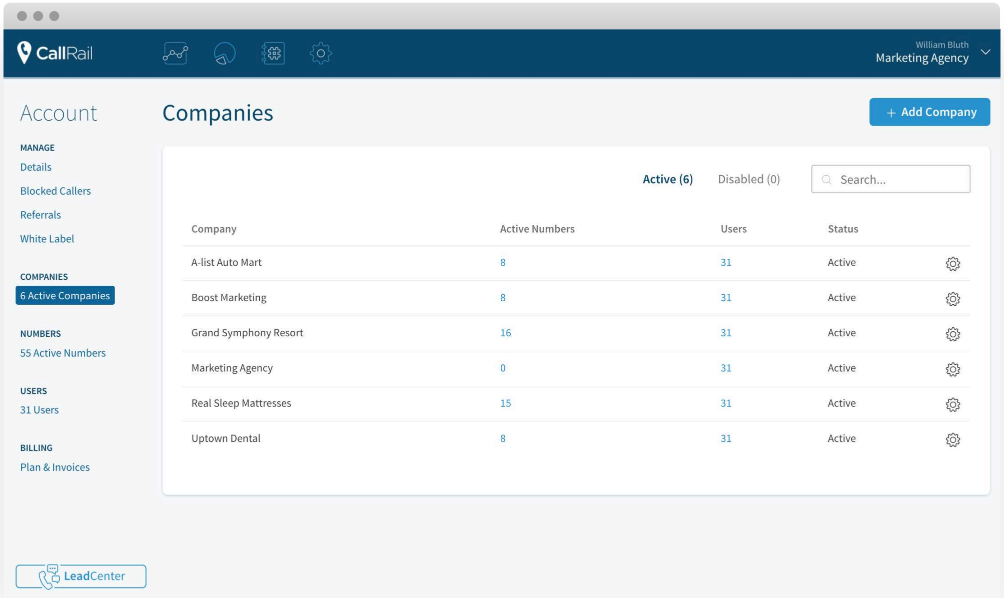
1. To add a new company, login to your CallRail account and click the "**Account**" tab at the top-right of the page, then select "**Companies**" from the drop-down menu that appears.

2. Here, click the "**+ Add Company**" button -- you'll see a pop-up appear, into which you'll enter the company's name, timezone and destination number. (This will be one of the tracking numbers we've created in the previous step.)

Continue to next page...

3 Then, click the "**Next: Add Users**" button in the bottom-right of the pop-up window. Here, you can select existing users in your account who will be able to access the new company. These users will retain their permission levels for your account, and all Administrator-level users will automatically be added to any new Companies.

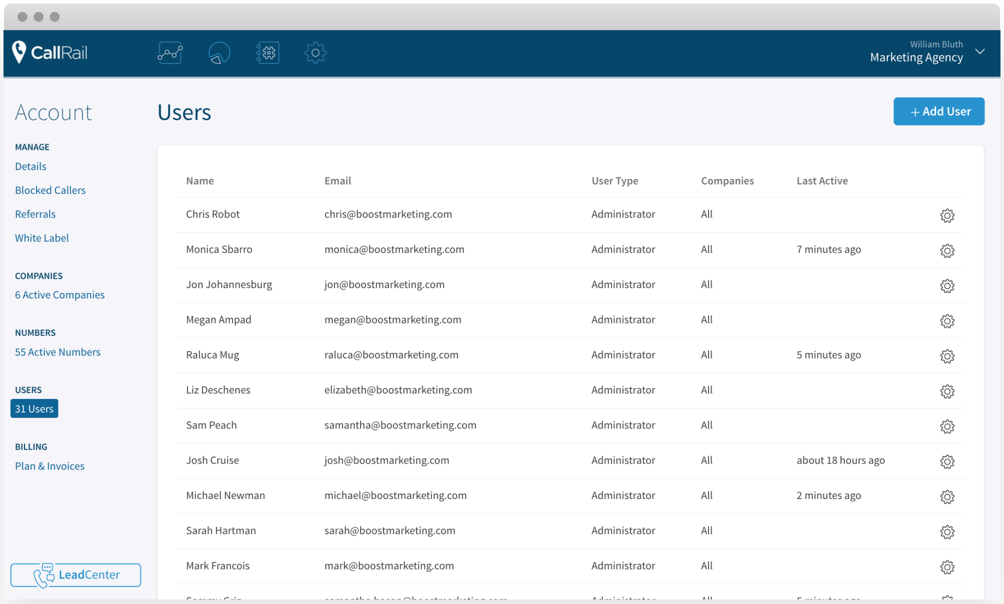
4 Once you're finished, click the "**Create Company**" button to finalize the company and add it to your account.



Adding More Users

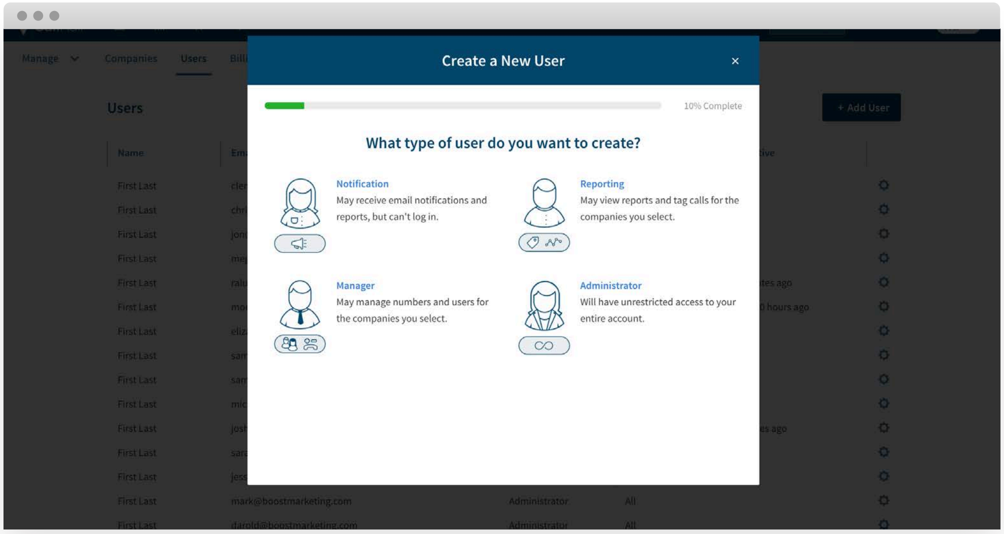
If multiple people are going to use your CallRail account, you'll want to grant them access as users so they'll each have their own logins. Each user can be granted a different access level and assigned to a different sub-account, ensuring they'll only have access to relevant account features and data.

1. To create a new user, click the "**Account**" drop-down at the top-right of the main CallRail dashboard, then choose "**Account Settings**." Select your "**Users**" from the left menu, then choose "**+ Add User**" from the top right of the next page.



Continue to next page...

2 Specify the new user's access level: **Notification** (can receive account notifications, but cannot login), **Reporting** (can view reports and tag calls for their assigned Company / sub-account), **Manager** (can manage tracking numbers and users for their assigned Company / sub-account), or **Administrator** (full, unrestricted access to the account)



3 Enter the new user's first and last name, and the email address they will use to login to CallRail. Then, click the "**Next: Companies**" button at the bottom-right of the pane.

Continue to next page...

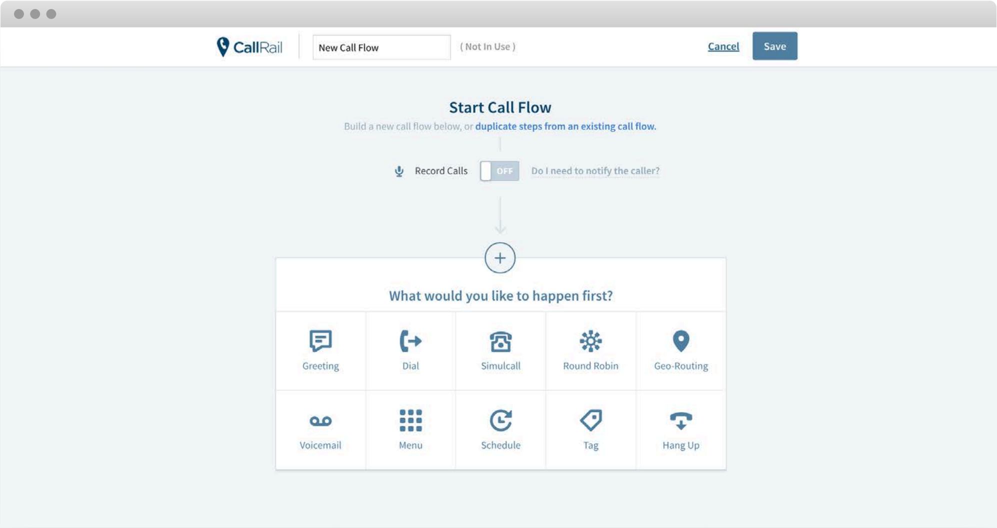
4 Select the Companies this user will be able to access. This will be the final step if you're creating a Notification-type user; otherwise, click the "**Next: Invitation Type**" button at the bottom-right of the pane.

5 Choose whether the new user will be emailed their login instructions, or manually set the initial password they must use to login to their account for the first time. Once this is done, click the "**Create User**" button in the bottom-right of the pane to finish adding this user to your account.

Automation and Call Flows

Now that your account is set up and humming along, you can use our advanced automation features to streamline many call processes.

Call Flows are customizable, automated routing sequences for each of your tracking numbers, like a menu prompt that directs incoming calls to different numbers based on the user's input. Other Call Flow features allow you to automatically capture and transcribe voicemails, use a Round Robin to ring multiple phones if a number doesn't answer a call, and specify that incoming calls be sent to voicemail during certain hours of the day.



Continue to next page...

1 To create a Call Flow, click the “**Numbers (#)**” button at the top of your CallRail dashboard, and select your “**Call Flows**” from the left menu on the next page. Then, click the “**+ Create New Call Flow**” button at the top-right of the next page.

2 Enter a name for your Call Flow in the field at the very top of the page, and then select whether you'd like this Flow to record its calls -- from here, you can customize the individual steps of the Call Flow.

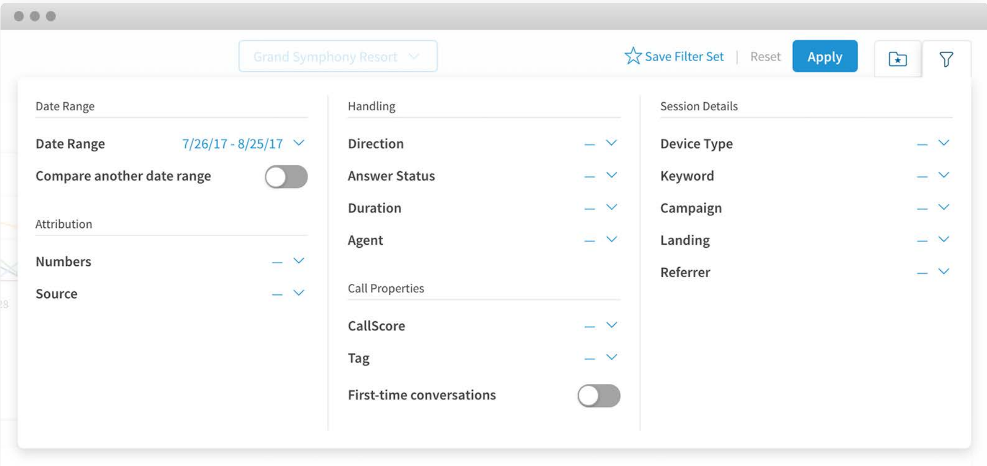
3 Once your Call Flow is complete, be sure to click the "**Save**" button in the top-right of the page. (After it's created a Call Flow will be saved to the "Call Flows" section of your account and can be assigned to multiple tracking numbers.)

Check our Help Center for detailed, step-by-step instructions on creating the different kinds of Call Flows available.

Use Filters to View Your Analytics

Your phone banks are lighting up, and you've got calls coming in from leads and customers -- it's time to start viewing your call analytics.

The easiest way to drill down into your call analytics and identify relevant data is by creating **Activity and Report Filters**. These allow you to access granular data filtered according to specific conditions -- for example, you can filter by tracking number and date to view all of the calls made to a specific number within a certain period of time.



1 To create a new Filter, click the "**Activity (Line graph)**" or "**Report (Pie graph)**" tab at the top of the main CallRail dashboard. The **Activity** tab shows all of your calls, while the **Report** tab breaks down your call volume to correspond to the different Companies in your account.

2 Select the "**All Filters (Funnel)**" button in the pane that appears, and then select the criteria you'd like to apply for this Filter.

3 You can set a wide range of criteria for a filter, including the **Date Range**, the **Source**, the **Duration**, the **Device Type**, the **Campaign**, and more. You can also set your filter to only show new callers by ticking the "**First-time callers only**" checkbox.

4 Click the "**Apply**" button at the bottom of the pane to update your call log with only the data that matches the criteria set in the Filter.

5 If this Filter doesn't quite suit your needs, you can click the "**Reset**" button at the top of the pane to clear out the criteria and start over. Or, click the "**Save Filter Set**" button to save this Filter for future use.

Once you've saved and selected a filter, it will continue to follow you as you navigate around CallRail until it's disabled. This allows you to not only filter data on your main Activity Dashboard, but also for individual Reports like "Call Attribution," "Missed Calls" and the "Lead Funnel." This is a great way to drill down and gain a broad, comprehensive view of how your analytics are stacking up.

The Adventure Continues

You've made it to the end -- congratulations! We've covered the basics of call tracking with CallRail, and you're ready to start turning your call analytics into actionable insights for your business.

We've only covered the basics here, and there's plenty of advanced features to familiarize yourself with as you become a seasoned professional in the world of call tracking. If you have questions or issues that weren't addressed by this guide, you can find answers in our online help center, or you can contact our support team.