

# CREATE A TRACKING LINE



## STEP-BY-STEP: CREATING A TRACKING LINE

- 1 Go to the Tracking Lines pod.



Tracking Lines

- 2 Select "New Tracking Line".

### Tracking Lines 409 numbers returned

**NEW TRACKING LINE**

NEW OUTBOUND CALLER ID

ROUTING PROFILES

Local Business Number  
972-555-0000

Reception or Guest Services  
972-555-1000



|                                                                                                                                                    |         |                                                                                                                   |
|----------------------------------------------------------------------------------------------------------------------------------------------------|---------|-------------------------------------------------------------------------------------------------------------------|
|  <b>Pre-Owned Website</b><br>214-555-0000 rings to 972-555-2000 | USED    |  0 calls in the past 45 days |
|  <b>eNewsletter</b><br>214-555-1000 rings to Sales Bridge       | SALES   |  2 calls in the past 45 days |
|  <b>CallerID</b><br>214-555-2000 rings to Main Bridge           | SALES   |  5 calls in the past 45 days |
|  <b>Service Line</b><br>214-555-3000 rings to 972-555-3000      | SERVICE |  1 calls in the past 45 days |
|  <b>Online Listings</b><br>214-555-4000 rings to Main Bridge    | SERVICE |  1 calls in the past 45 days |

For help creating a tracking line, call Support at 214-446-7867.

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A new window will appear.\*

### Create a Tracking Line

|                                                                                                          |                                                                          |
|----------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|
| <b>Tracking Line Name:</b> ⓘ<br><input type="text" value="Rick Tanner Inbound Line"/>                    | <b>Tracking Line Department:</b> ⓘ<br><input type="text" value="Sales"/> |
| <b>Toll-free or Local:</b> ⓘ ✓<br><input type="radio"/> Toll-free <input checked="" type="radio"/> Local | <b>Routing:</b> ⓘ<br><input type="text" value="Direct Ring-To"/> ▼       |

Local Business Number: 9725550000 ⓘ

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**Direct Ring-To Number:** ⓘ

972-555-0000

 **CREATE LINE**

\*Please fill out **all** fields.

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The next page will show your new tracking line number and the number it is ringing to. Click the MANAGE button to edit shares and call categorization.

## CONGRATULATIONS!

Your new line is: **2145555000**

And it rings to: **9725550000**

 **CREATE ANOTHER LINE**

- OR -

 **MANAGE 2145555000**

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## Edit Shares and Call Categorization.

To ensure calls from this line share to CRM, choose the inbound share option for your CRM under Third Party Shares.

By default, calls are reviewed by artificial intelligence and human reviewers as Sales calls. If the call is for a different department or should not be reviewed, edit the Call Categorization option.

### Edit Tracking Line - 214-555-5000

Tracking Line Name\* ⓘ  
Rick Tanner Inbound Line

Tracking Line Department ⓘ  
Sales

Routing ⓘ  
Direct Ring-To ▼

Direct Ring To Number\* ⓘ  
9725550000

Record this Line ⓘ  
☒ Yes, Record ☐ No, Don't Record

Greeting ⓘ Record New ⓘ | [Learn More](#)  
Standard disclaimer for recording ▼  
[▶ Play Greeting](#)

Whisper  
ex. Holiday Mailer

Third Party Shares ⓘ  
-- select option -- ▼

Call Categorization ⓘ  
☒ Review calls for Car Wars  
☐ Review calls for Car Wars Service  
☐ Do Not Review Calls

[Deactivate this line](#)

[SAVE LINE](#)