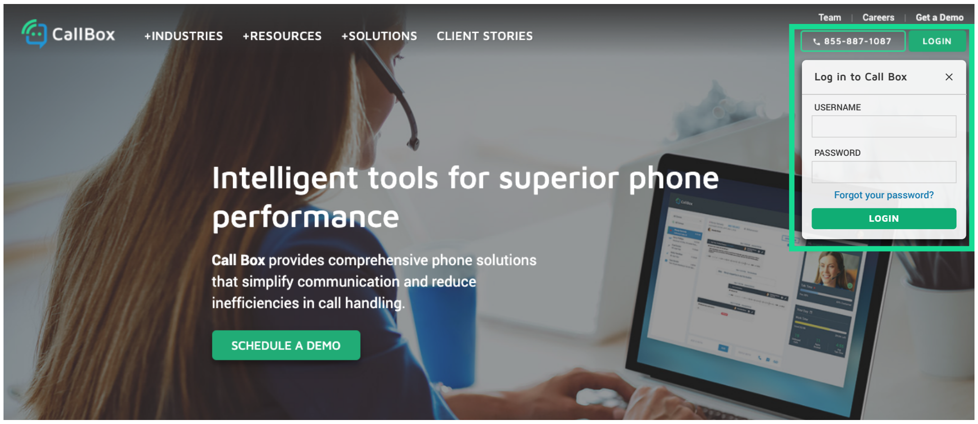
CallBox

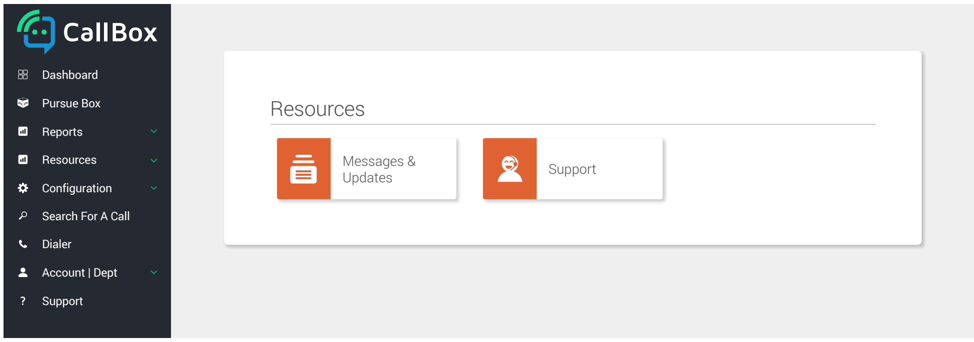
CALL BOX MARKETING WALKTHROUGH

THE DASHBOARD

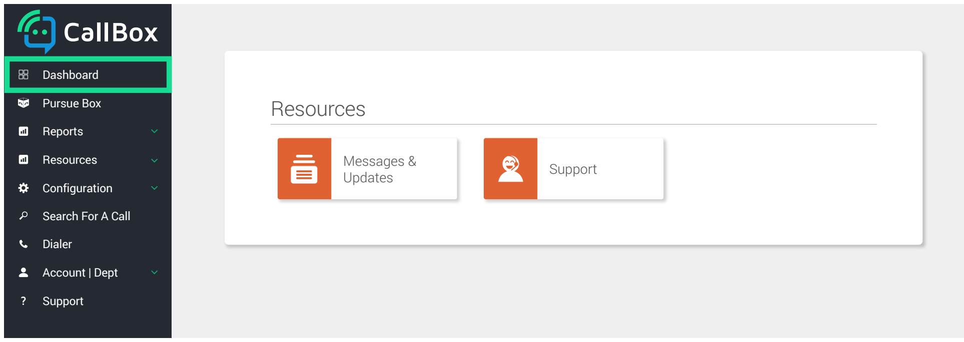
1 Log in at callbox.com. Use your unique username and password given for Call Measurement to login to the Call Box Marketing Platform.



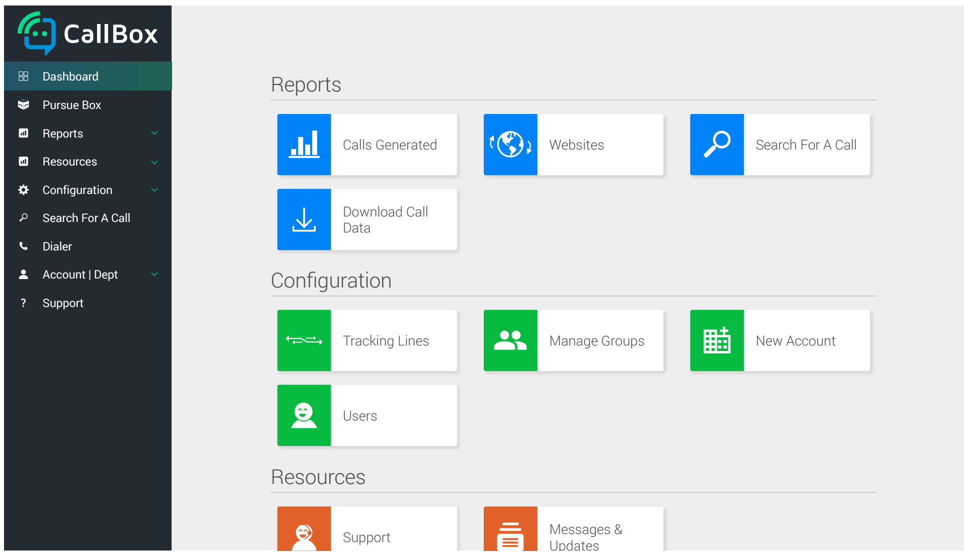
2 The first screen gives you any Messages / Updates and access to our support team.



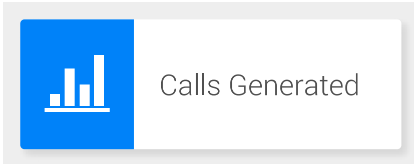
3 The top left corner has the quick link to the Call Box Marketing dashboard / homepage:



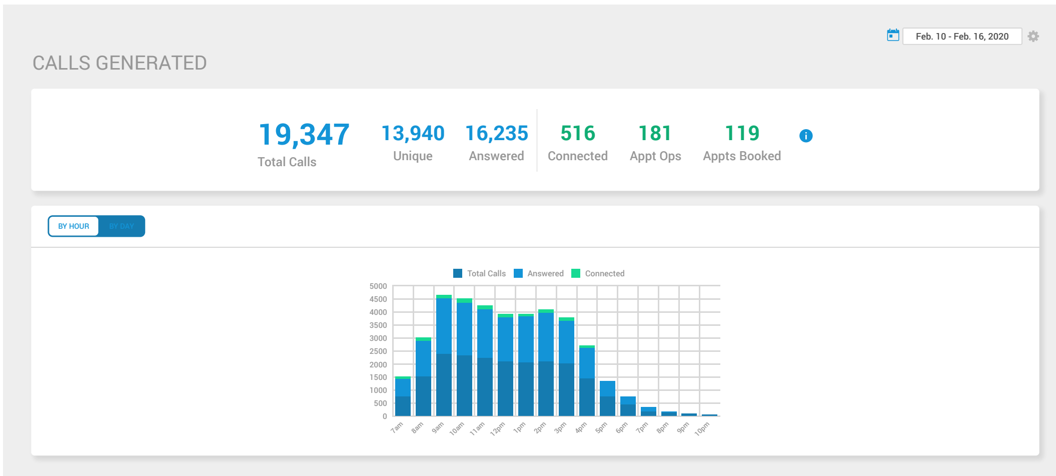
4 The dashboard takes you to the homepage.



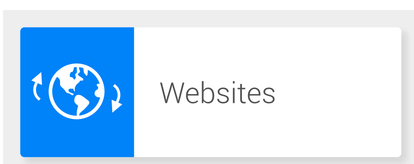
CALLS GENERATED



Call Generated will give you total calls, unique calls, answer rate and any reviewed data we have available for your offices. It will show you the summary of when calls come in, what hour / day of the week, and when they get answered. You can view this same data office by office or by tracking line.

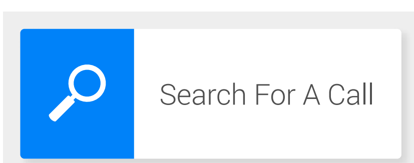


WEBSITES

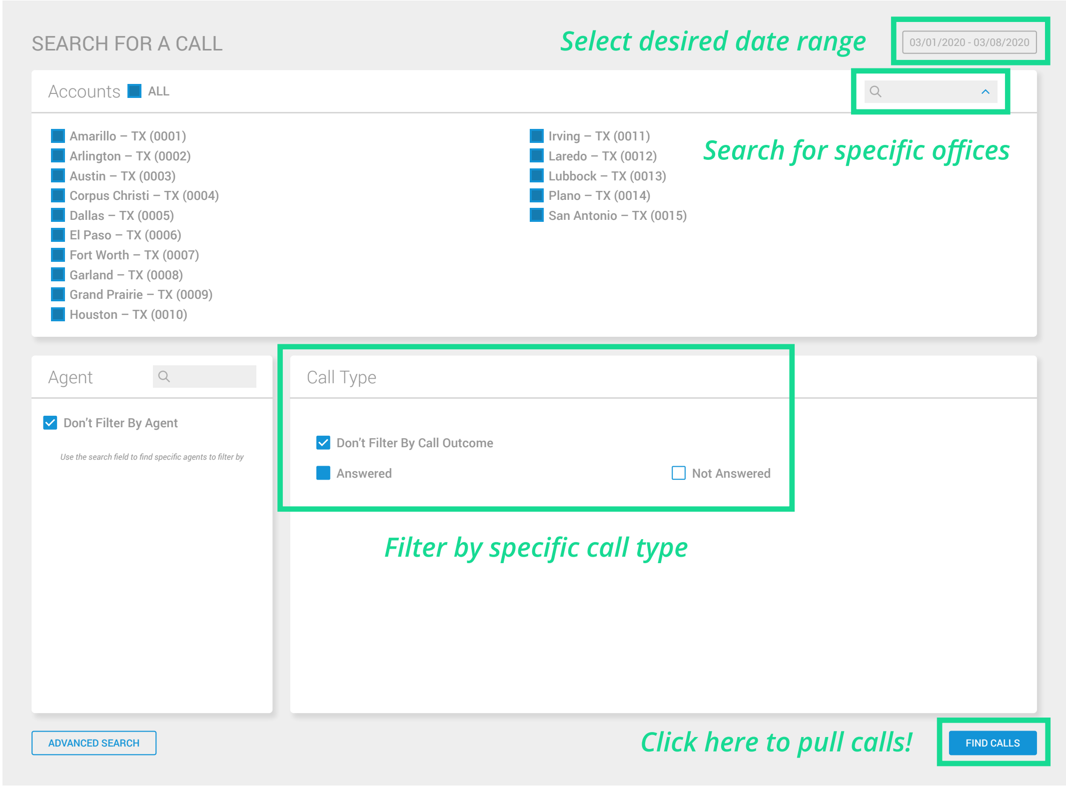


The website pod gives you the ability to view website data. Website Calls Optimize, this pod would give you all of your website data, including referral source and UTM tagged information.

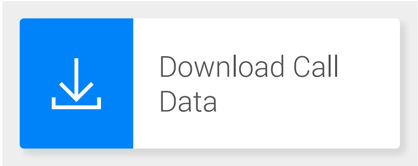
SEARCH FOR A CALL



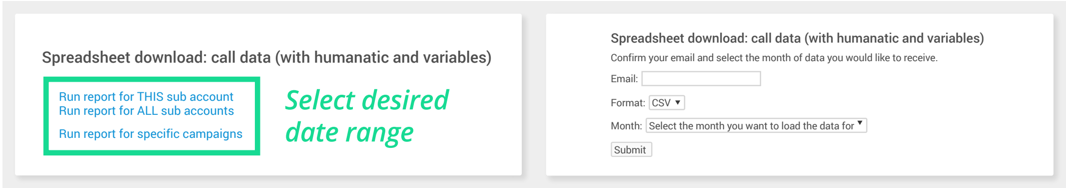
Search for a Call gives you the ability to find audio files across all offices. You can search for different call types, date ranges and/or specific offices. The audio files will pull with the typical audio information included.



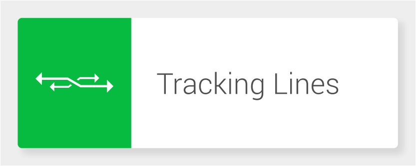
DOWNLOAD CALL DATA



Download Call Data gives you the option to download all call data in spreadsheet format. Specific selections outlined below.



TRACKING LINES



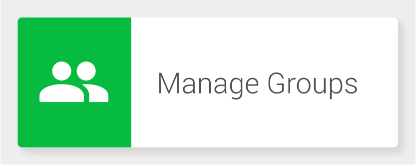
Tracking lines will show you a list of all tracking lines within any of your accounts. You can change labels / update ring tos numbers / search for a specific office or tracking line to review. Click on a tracking line to update / make changes.

Tracking Lines

Tracking Lines | NEW TRACKING LINE

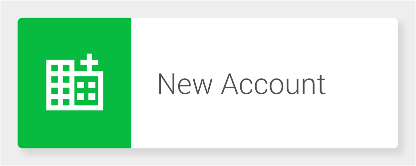
Number	Ring To	Account	Advertisement	Description	Campaign	Detail	Details
214-555-0000	469-555-1000	Dallas – TX (1000)(1234567)	March 2020 Offer	Offer	Current Clients		
214-555-1000	469-555-1000	Outbound - (0000)(1234567)	Dallas – TX	Outbound	Outbound		
214-555-2000	469-555-1000	Dallas – TX (1000)(1234567)	Direct Mail	Coming Soon	Direct Mail		
214-555-3000	469-555-1000	Dallas – TX (1000)(1234567)	Internet-Web-Search	Banner Ad	New Business		
214-555-4000	469-555-1000	Dallas – TX (1000)(1234567)	Direct Mail	Referral	Direct Mail		
214-555-5000	469-555-1000	Dallas – TX (1000)(1234567)	Facebook	Banner Ad	New Business		

MANAGE GROUPS

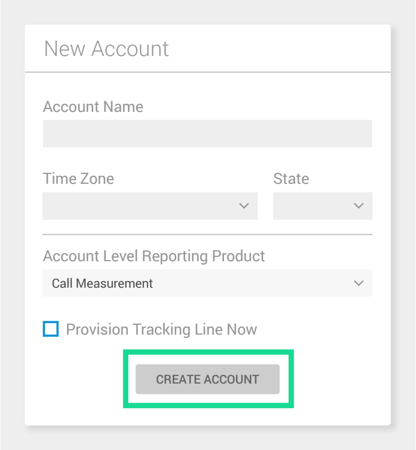


This pod organizes your staff into groups so you can easily separate the Call Center calls from the Office calls as needed.

NEW ACCOUNT



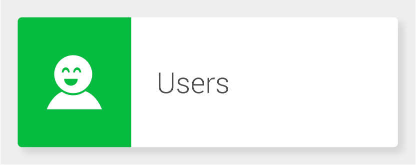
Use this pod to add new accounts / offices to your account. Enter in all necessary information and by clicking submit the Call Box team will be notified that a new account has been added and reach out to configure.



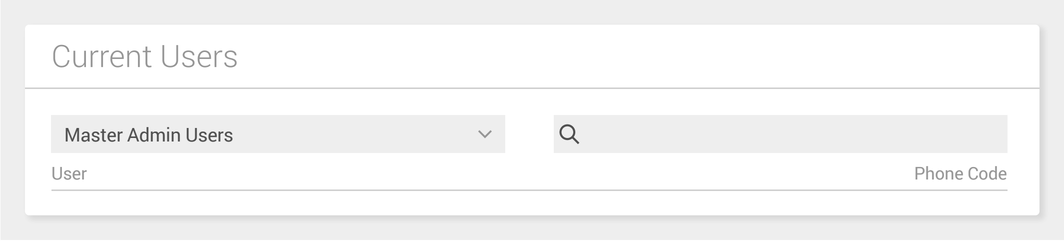
Add the necessary fields and click “Create Account" to set up.

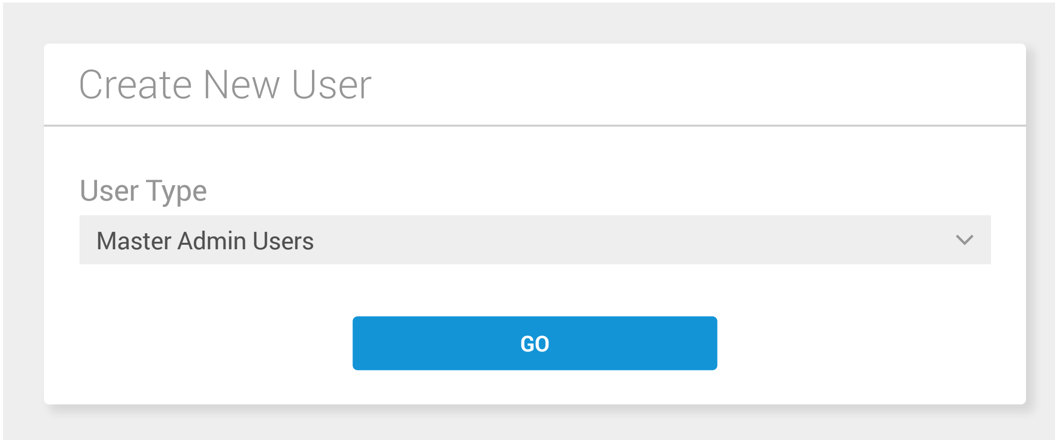
If you’d like to provision a tracking line click that box and enter the local number (or select Toll Free) to provision a number from the original account creation.

USERS



Use this pod to create / edit new staff profiles in the account. You can search by account type and the staff member name. You can also add new users in this pod as well.





In order to access an individual account within Call Box or Call Measurement, use the sidebar navigation to login to an individual account.

Click the drop down arrow and then select “Switch Accounts” to select an indivdual office for specific account review. Start typing in the search bar and then select the office you wish to login for. Click “Go” to navigate to Call Measurement.