



# Using Start Pings

A Retreaver Training Services Guidebook

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# Guidebook: Using Start Pings

## Before You Begin

*Retreaver* helps companies gain insight into which online and offline campaigns are driving calls, and which of those calls are converting to sales, happy customers and positive business results.

This guide walks you through, step-by-step, how to use the Retreaver Start Ping to send data about your caller to 3rd party web services, and return data to your calls as tags for use in routing and reporting.

### Requirements

In addition to a Retreaver account, completing the exercises described in this Guidebook also require :

- Access to a third-party web service with data about your callers that is webhook accessible, or
- A Zapier and a Google Sheets account

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## Terminology

The following terms are used throughout this Guidebook, the Retreaver Knowledge Base, and Retreaver documentation. Recognizing each of our customer's businesses are different, we've highlighted commonly used and similar terms for reference:

- **Contact Sources:** The partners, people, and channels that you need to track as the sources of inbound calls. Also referred to as - Publishers, Sources, Affiliates, Channels.
  - **Payout:** Amount you pay for each converted lead. For internal campaigns, it may be the average cost of ad placement, for partners the amount you pay them for the lead.
- **Contact Handlers:** The call centers, partners, people or agent who will be receiving calls coming in from your Contact Sources. Also referred to as - Call Handlers, Call Endpoints, Agents, Call Buyers.
  - **Revenue:** Amount you earn for each converted lead. Whether this is the sale value or LTV of a new customer, or the revenue you earn from a buyer paying you for leads.
- **Numbers:** Static local phone Numbers, toll-free phone Numbers or SIP addresses from where a call may come. Port existing Numbers into, or purchase new Numbers directly within, your Retreaver account.
- **Number Pools:** A set of Numbers used to capture dynamic/real-time information from mobile or other digital landing pages. A temporary number is presented and tagged for callers like a "session cookie" so you can know more about who is calling and what they are calling about.
- **Campaigns:** These are the configured business rules, workflows, that are applied when a Caller dials a Number that is presented by a Contact Source in order to get them to the best Contact Handler to take their call. You can create as many campaigns in Retreaver as you like.
- **Tags:** Tags are data points that are attached to calls and used in reporting, routing and identifying the best Contact Handler to answer the call.
- **Knowledge Base:** Also referenced as KB. The support portal for Retreaver Customers contains a number of articles and instructions for completing various tasks in Retreaver.

**Tip:** If you are a performance marketer using the nomenclature of Publishers and Buyers, go to the upper right of your screen and click the shopping cart icon. Then switch the toggle to turn on *Performance Marketing Edition*.



### Performance Marketing Edition

Enables our performance marketing features, with specific nomenclature to make it easier for performance marketing based customers to use Retreaver.



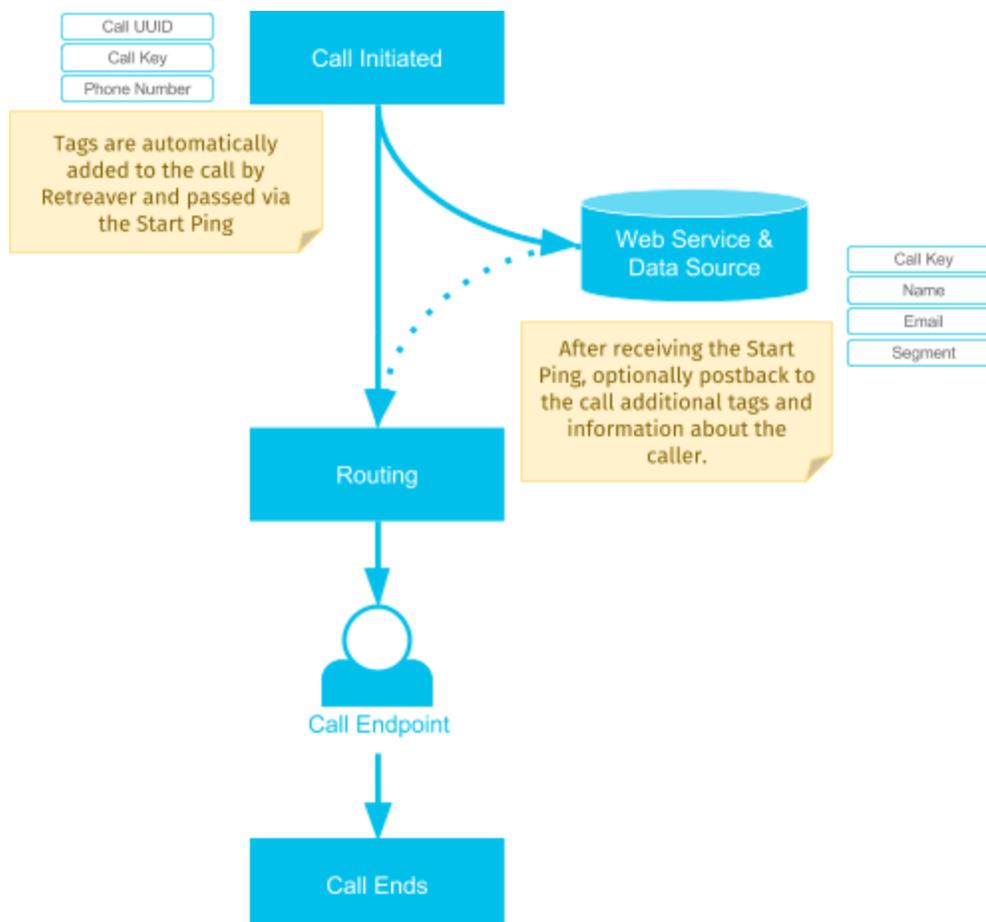
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## Concepts

The Retreaver Start Ping is a call Tracking URL that is *fired* when a call is first initiated by a caller. Information about your caller is sent from Retreaver to a 3rd party web service, allowing you to automatically update your customer contact database, find the caller's profile, and return more data onto the call. Data that may be used for more precise routing, deeper agent insight, better experience personalization, and more useful call analytics.

When a call is initiated, Retreaver automatically retrieves the Caller ID, City, and State from the caller's network where available. You may also append additional data tags from your Retreaver.js integrations such as cookie-based IDs, customer segment, email, membership number, etc.

Once the Start Ping is received by the web service, it may postback to Retreaver additional information from an associated Customer/Contact Database. Retreaver waits briefly for the postback before continuing on to route the call.



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## Gather Relevant Information

To help prepare for the configuration of Start Pings in your campaigns, start by gathering relevant information. The following is a sample of the type of information to collect, and is the basis of the examples throughout this Guidebook.

Item	Details
Test Campaign	Start Ping campaign configured with a single static number that routes with nothing pressed to a single call endpoint (buyer). No prompts or conversion criteria are required.
Customer/Contact Database	Identify where you store your caller related data. Will you look up callers in your CRM, a web-based spreadsheet, marketing solution or 3rd party data service.

## Optional for Exercises

Item	Details
Zapier Account	Create a free Zapier account with the 14-day Starter Plan trial enabled OR have a Starter or better Zapier account available.
Google Sheets Spreadsheet	Create a single tab Google Spreadsheet with the columns: <ul style="list-style-type: none"><li>• Name</li><li>• Email</li><li>• Phone Number</li><li>• City</li></ul>

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## PART I: Creating a Start Ping to Add Contact Data to a Call

The following is a walkthrough of using Start Ping to exchange call data with your Customer/Contact Database. If you don't have a Customer/Contact Database, see section [Try It Yourself - Using Retreaver, Zapier & Google Sheets](#)

- Open a campaign in edit view.
- Add a Tracking URL to the campaign by clicking the green Add button
  - Select tracking url type: "Start When a call comes in"
  - Enter the webhook url beside the dropdown that says POST, replacing the highlighted information with your own
    - yourwebservice\_url
    - tag\_1
    - tag\_token\_1

POST `https://yourwebservice_url/?call_uuid=[call_uuid]&call_key=[call_key]&caller_id=[caller_id] &tag_1=[tag_token_1]`

Note - call\_key and call\_uuid need to be included if you want to add tags to the call with your postback from the Customer/Contact Database.

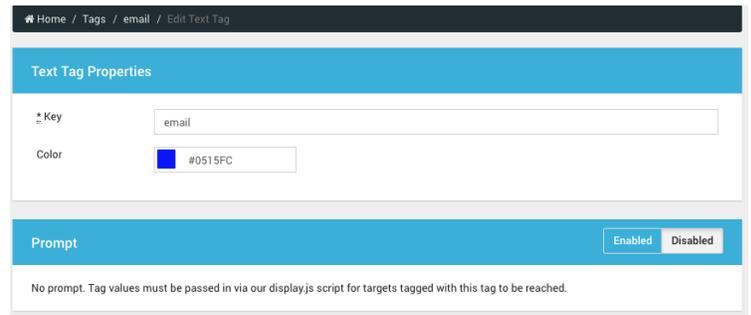
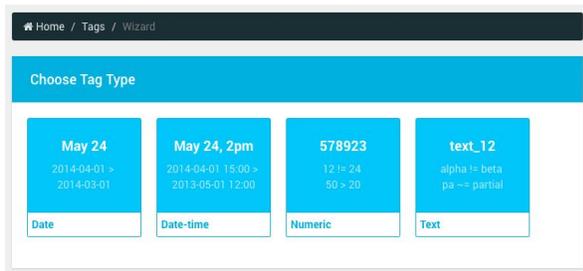


- Save the campaign
- Configure your Customer/Contact Database to
  - Receive the webhook and process the url parameters
  - To post-back to Retreaver using the following url structure; replacing the highlighted information with your own
    - {call\_uuid} - use the call\_UUID from the Start Ping
    - {call\_key} - use the call\_key from the Start Ping
    - tag1 - the key of the tag as you want it to appear in Retreaver
    - {data1} - the key value for the tag related to the caller to be sent to Retreaver
    - Note: For more tags, simply add additional &tagN={dataN} pairs

PUT `https://api.retreaver.com/calls/{call_uuid}/set_value?key={call_key}&tag1={data1}`

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- Create a new Tag in Retreaver for each of the attributes you return from the web service and that you want displayed in your reporting and used in your routing



- Complete a test call.
- Confirm that your tags were added to the call by looking at the call log and call details

Via	UUID	Number	Campaign	Caller ID	Call Endpoint	City	Co.	Tags	Duration	Call status
	2fe01b93	+18443699636	start_ping - Start ...	+14162098...	N/A	TORONTO, ON	CA	1 3 1	In Progress	Established
	36beffe5	+18443699636	start_ping - Start ...	+14162098...	My Call Center - ...	TOR...		1 'email' tags email matt@tryitout.com	0:03	Finished

## Troubleshooting Your Start Ping

### 1. Check the Call Flow for Start Ping details

Clicking on the UUID of any call in the call log will present the details of the call. Scroll to the bottom to view the *Call flow*.

If the Start Ping was fired successfully you will see a green bar that says:

*“Start pings competed successfully”*

If this is not present, or you see an error in yellow or red, then proceed to the next troubleshooting step.

**Call flow**

- The call ended because the caller hung up.
- Handler My Call Center - +18668987878 has connected!
- Calling handler My Call Center - +18668987878.
- Considering handler My Call Center - +18668987878.
- Routing using when 'nothing is pressed' setting.
- Start pings completed successfully.
- Call was tagged "status:success", "attempt:59e67791-e554-45bc-90cf-700fb334efe0", "id:b5cb383a-75c1-4754-bf43-4463338435c0", "request\_id:59e67791-e554-45bc-90cf-700fb334efe0" as a result of values passed in response to start ping.
- Using routing settings and prompts from campaign start\_ping - Start Ping.

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## 2. Confirm the Tracking URL was processed correctly

Every tracking url in Retreaver is logged with each call. You can access them from the [Call Log](#) by clicking on the *Pixels Fired* button associated with each call. Scroll to the right to view that field.

Tags	Duration	Call status	Conversion	Rec.	Start	Pixels fired
1 1 3 1 1	0:11 0:08 0:01 0:02	Finished		N/A	16 Oct 20:55	1

[Click here to see the status of the Start Ping](#)

If the Pixels Fired for your call is:

- Light Blue - The tracking url is still waiting to be processed by our server.
  - If your call is still in progress then refresh the call log to view if it's updated.
- Green - All the tracking urls for the campaign have been processed successfully.
- Red - There is an error with the firing of the tracking url. Click the button to view the status details.
- Grey - No tracking urls were fired.

Regardless of the status. You are always able to click on the Pixels Fired to get more details about the Tracking URL.

### Fired pixels for call 92386d19-e30e-[REDACTED]

**Fired Pixel 0**

**Status:** Fired

**Error count:** 0

**Created at:** 2017-10-17 16:57:34

**Fired time:** 2017-10-17 16:57:34

**Fire order:** 0

**Batch UUID:** 77624072-ddc3-4824-[REDACTED]

**Source:** ↩ start\_ping - Start Ping (Campaign)

**Tracking URL:** Set Data to Web Service

**URL:** https://hooks.zapier.com/hooks/catch/1867429/ir2kuk/?call\_uuid=92386d19-e30e-[REDACTED]&call\_key=[REDACTED]2773f8&caller\_id=[REDACTED]&caller\_city=TORONTO

**Response:** Firing call start ping succeeded. Took 0.073371079s.

3. Check that your web service successfully received and processed the Start Ping.

4. If you still can't figure it out, submit a ticket to Retreaver support, including the url to at least one sample call where the issue has been noticed. Call URLs may be obtained by right-clicking on the Call UUID in your call log and choosing to Copy Link Address. It will look something like:

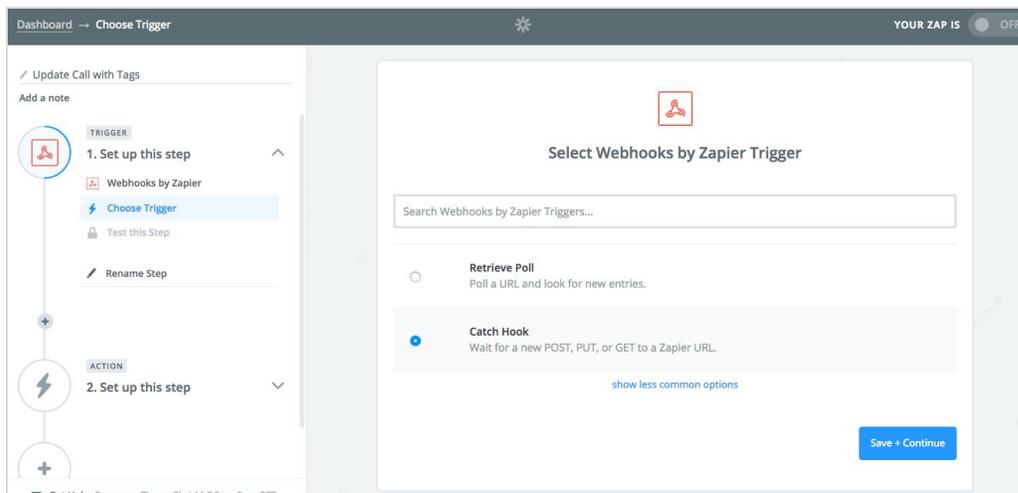
<https://retreaver.com/calls/b358a855-88c3-4b73-a830-b0190a071a5X>

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## Try It Yourself - Using Retreaver, Zapier & Google Sheets

If you don't have access to updating your contact database, this example will show you how to use a Start Ping with the free tools of Zapier and Google Sheets.

- Open your [Zapier](#) account and your [Google Sheets](#) account
- In Retreaver add a new campaign with a simple structure of:
  - Name: Start Ping
  - Routing: When “nothing is pressed” dial {your phone number}
- Next create the Start Ping webhook using Zapier
  - Open Zapier
    - Create a new Zap
    - Select Webhooks by Zapier as the trigger
    - Select Catch Hook as the type



Zapier walks you through each step to connect your accounts.

- Click Save + Continue, then click Continue again. Copy the webhook URL. It will look a bit like:
 

```
https://hooks.zapier.com/hooks/catch/1234567/abcabc/
```
- Next complete a test call in Retreaver, creating sample data for Zapier
  - Add a phone number to your campaign in Retreaver. Any number will do
  - Edit the campaign and add a new Tracking URL
    - Set the type to: Start When a Call comes in
    - Add the url to POST:

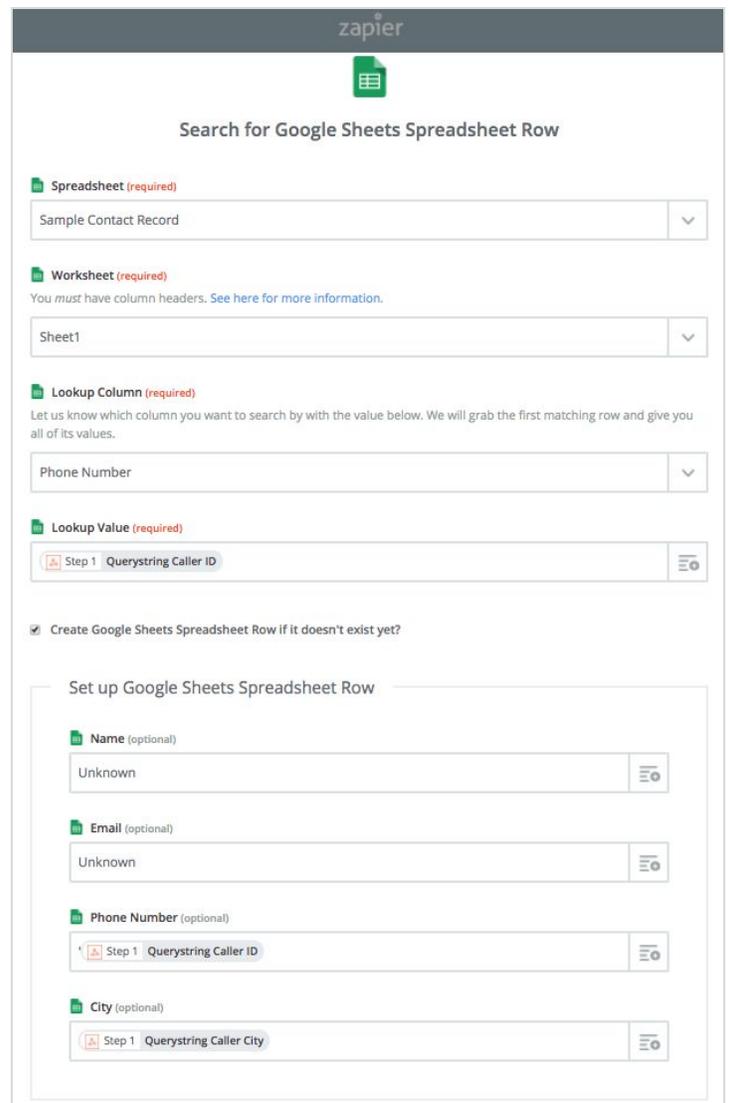
```
https://hooks.zapier.com/hooks/catch/1234567/abcabc/?call_uuid=[call_uuid]&call_key=[call_key]&caller_id=[caller_id]&city=[caller_city]
```

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Remember to replace the Zapier part of the url from https to the ? with your own.

- Save the campaign
- Call the phone number you created for the campaign. This will create a sample call record
  
- Go back into Zapier to finish capturing the Start Ping in Zapier and sending the data to a Google Sheet
  - Click “Okay I did this”. Zapier will now look for the call data
  - Click Continue until you are onto the next step “Choose an Action Step”. Select Google Sheets
  - Select “Lookup Spreadsheet Row”, then click “Save + Continue”. Connect your Google account
  - Fill in the fields for your spreadsheet per the example at right. The key fields to add for this example:
    - **Lookup Column.** Set to your Phone Number field. **Lookup Value.** Set to the Querystring Parameter from the first step
    - **Check** the “Create Google Sheets Spreadsheet Row if it doesn’t exist yet”
  - Click Search or Create + Continue. If Test Successful, click Add a step



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- Configure the postback of data to Retreaver
  - Select Webhooks by Zapier Action
  - Select PUT then click Save + Continue
  - Enter in the URL and set the Payload type to Raw.

 **URL (required)**

Any URL with a querystring will be re-encoded properly.

`https://api.retreaver.com/calls/  Step 1 Call Uuid /set_value?key=  Step 1 Call Key &name=  Step 2 Name &email=  Step 2 Email`

 **Payload Type (optional)**

Pay special attention to the proper mapping of the data below.

Raw

- Set Unflatten to No
- Click Continue

If the test is successful you are all finished with the configuration. Ensuring your Zap is turned on, perform another test call into the campaign. Your calls will now start updating the spreadsheet, and receiving data back.