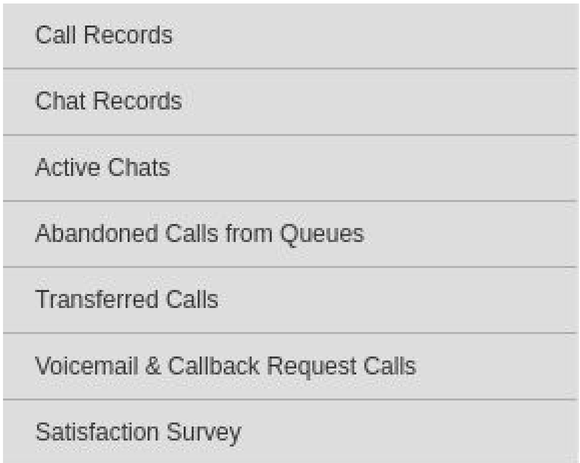
Quality Control Screen

The quality control screen is used to view calls and chats (active and non-active), transfers, voicemails, and satisfaction surveys. Call records can also be listened to here. Also, this data can be reviewed to determine proper agent performance.

Calls Tab

By clicking the calls tab, 

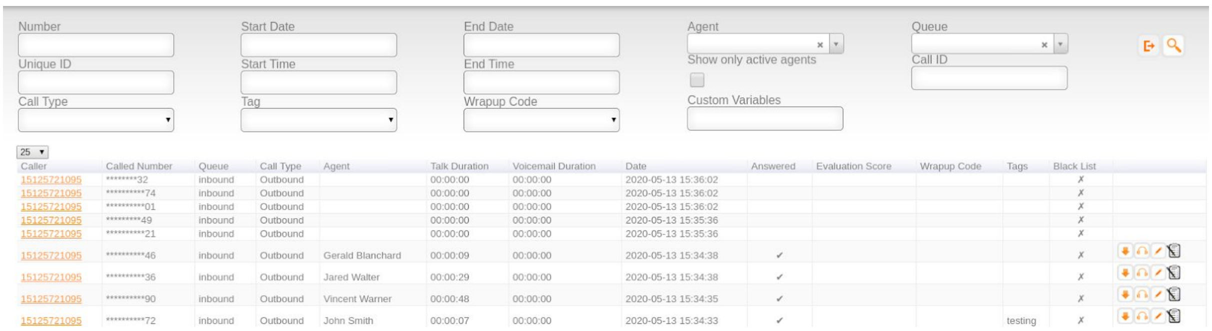
, the following information can be viewed:



Each of these tabs is discussed in detail below:

Call Records

The call records screen is shown below:



Exporting Call Records

1. Click the export button, , located in the top right-hand corner to the left of the search button, .
2. The file will be downloaded in .CSV format.

Note: using the records filter, 

, up to a 100 call records can be shown on a single page in the call center studio tenant

Searching Call Records

Call Records can be searched in multiple different ways:

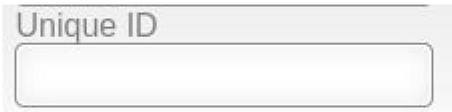
Number

1. Click the "Number" input box, type the desired phone number of the call records. An example is shown below:

2. Click the search button, .

Unique ID

1. Click the Unique ID input box, type the unique ID an example is shown below (The Unique ID can be found in the Reporting tab under Call Details, once the report is downloaded via .CSV, the unique call ID, will be shown. The unique ID can also be used to match the call records to the CRM used):



2. Click the search button,  .

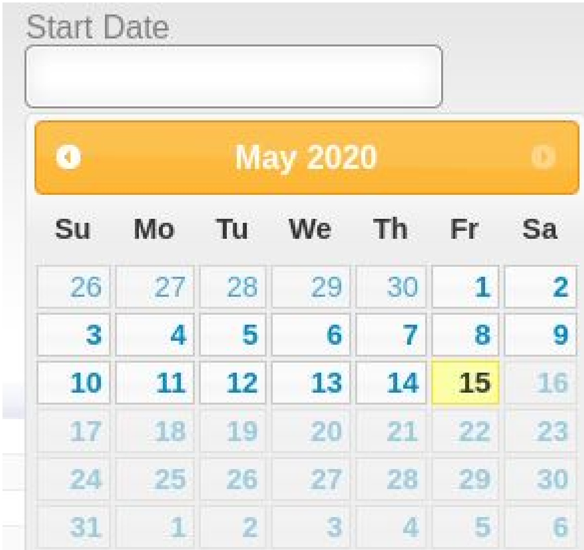
Call Type

1. Click the Call Type input box. The following dropdown list will appear:

2. Make a selection from the dropdown list.
3. Click the search button,  .

Start Date

1. Click the start date input box. The following calendar pop-up window will appear:

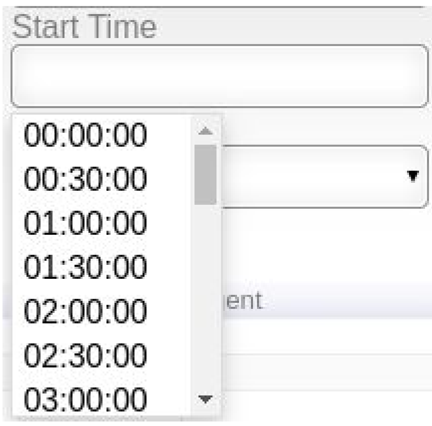


2. Click the desired start date

3. Click the search button,  .

Start Time

1. Click the start time input box. The following dropdown list will appear:

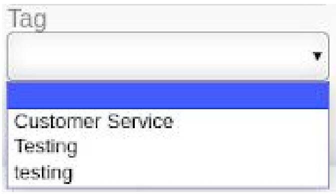


2. Select the desired start time.

3. Click the search button,  .

Tag

1. Click the tag input box, an example dropdown menu with tags is shown below:

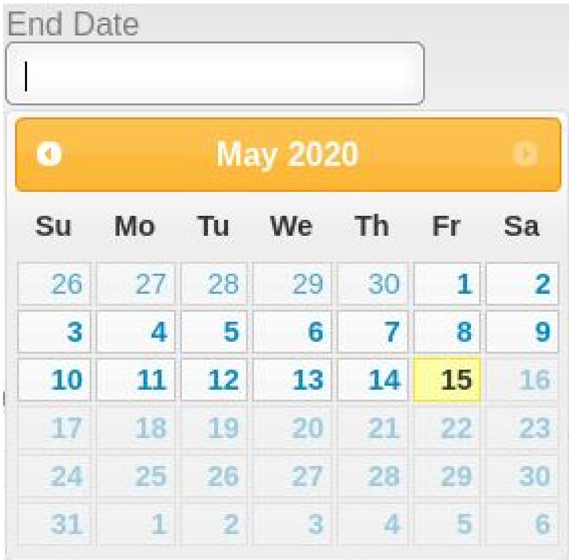


2. Select the desired tag.

3. Click the search button,  .

End Date

1. Click the end date input box. The following calendar pop-up window will appear:

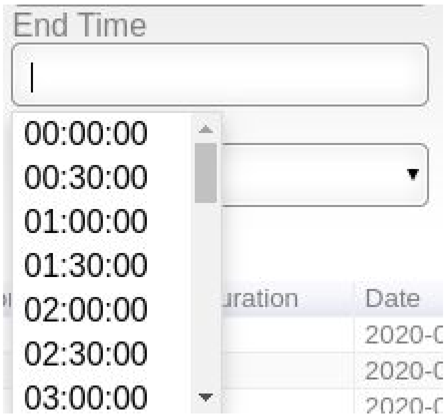


2. Click the desired end date

3. Click the search button,  .

End Time

1. Click the end time input box. The following dropdown list will appear:

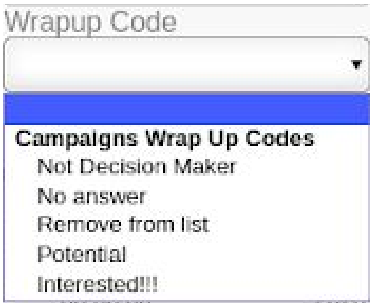


2. Select the desired end time.

3. Click the search button,  .

Wrapup Codes

1. Click the wrapup codes input box. An example dropdown list is shown below:

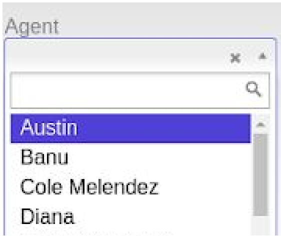


2. Select the desired wrapup code.

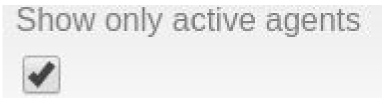
3. Click the search button,  .

<u>*Agent*</u>

1. Click the agent input box. An example dropdown list is shown below:



Note: Only active agents can be filtered by checking the "Show only active agents" checkbox shown below:



2. Select the desired agent

3. Click the search button,  .

Custom Variables

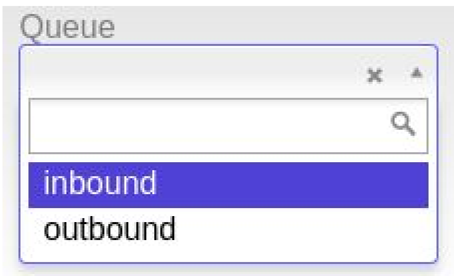
The custom variable is used for integrations via web service. For example, if the tenant uses a number masking web service, each agent has a unique ID. This ID can be searched for using this search box.

1. Click the custom variables input box.
2. Type the desired custom variable. The input box is shown below:

3. Click the search button,  .

Queue

1. Click the queue input box. A dropdown list will appear. An example is shown below:



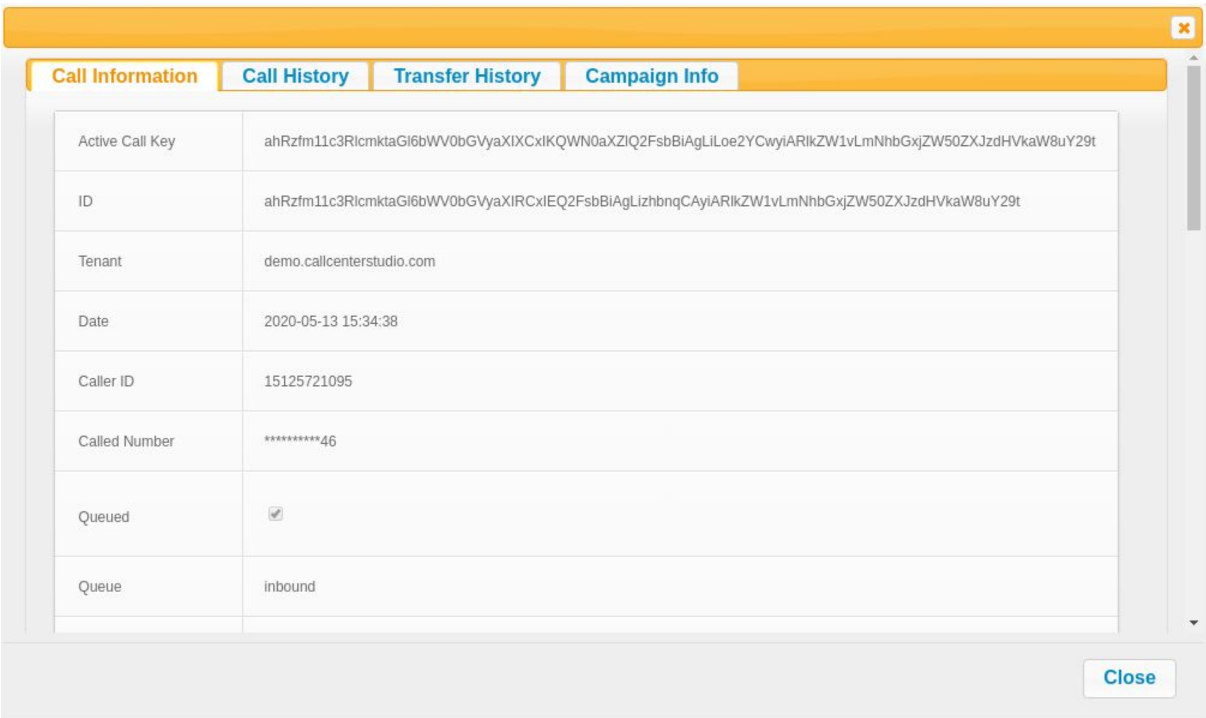
2. Click the desired queue.
3. Click the search button,  .

Call ID

1. Click the Call ID input box.
2. Type the desired call ID (Created when the call is passed through the system, can be found in Accessing Call Details > Active Call Key).
3. Click the search button,  .

Accessing Call Details

1. Under the Caller column, click the desired caller number highlighted in orange for more details. The following pop-up screen will be displayed:



Call Information

Under the call information tab, the row headings are explained in detail below:

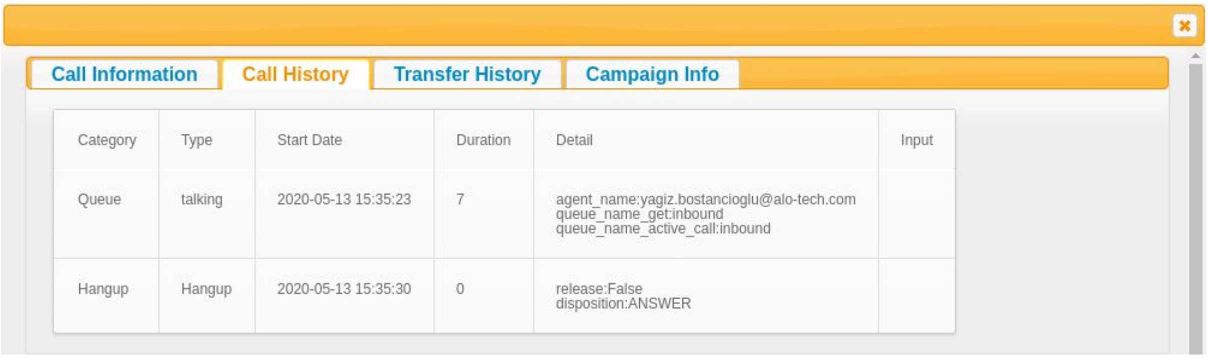
Active Call Key	When a call starts, the application creates a unique key specific to that call.
ID	ID similar to Active Call Key logged for the call.
Tenant	Provides the URL name for the demo tenant
Date	Provides the date and time of the incoming call in the following format: YYYY-MM-DD HH:MM:SS
Caller ID	Provides agents phone numbers used for the call
Called Number	Provides the called number in the following format: *********XX
Queued	Displays a checkbox showing whether the call was queued or not.
Queue	Displays the name of the queue used by the agent
Call Type	Displays whether the call was inbound or outbound.
Queue Date	If the call was queued, the date and time will be displayed in the following format: YYYY-MM-DD HH:MM:SS

Assigned	Not every call has to be queued. The call may not enter a queue in the IVR to which the dialed number is forwarded. For example, if there is no queue step or for some reason such as there may be a bug, dialed out of office, etc., the call will not be queued. This checkbox indicates whether the call is queued.
Agent	Gives the name of the agent
Waiting Duration	The waiting duration is the amount of time the customer waited before connecting with an agent. (In seconds).
Answered	Shows whether the call was answered or not using a checkbox
Answered in SL	Based on the defined SL in Queues Section. For example, if the defined SL was 20 seconds, and the waiting duration was 15 seconds, this checkbox would be checked because it was answered in the defined SL.
Answer Date	Provides the date and time of the answered call in the following format: YYYY-MM-DD HH:MM:SS
Hang up Date	Provides the hangup date and time of the call in the following format: YYYY-MM-DD HH:MM:SS
Duration	Gives the call duration time.
Hold Count	The Hold count is the number of times the agent placed the customer on hold.
Hold Duration	Gives the total hold duration time

Local Release	If the agent hung up, "True" will be displayed. If the customer hung up, "False" will be displayed.
Abandoned	If the call rang on the agent screen, but the agent did not answer the call
Short Call	Based on the defined Short Call duration in Queues Section. For example, if the defined Short Call duration was 20 seconds, and the total talk time was 30 seconds, then the output would be "False" because it was longer than the short call duration.
Recording Uploaded	Displays a checkbox to show if the call recording was uploaded correctly.
Avg. Evaluation Score	Gives the agent's average evaluation score if the supervisor made an evaluation.
Tags	If an agent or supervisor tagged the call, the tag will be displayed here.
Location	If the Queue used has a location assigned to it, then the location name will be displayed here.
Simulated Call	The administrator can make simulated calls. If a simulated call is performed, then the output will be "True."
Simulation Date	If the simulated call output is "True," then the simulated call date will be displayed.

Call History

By clicking the call history tab, **Call History** , the following screen will be displayed:

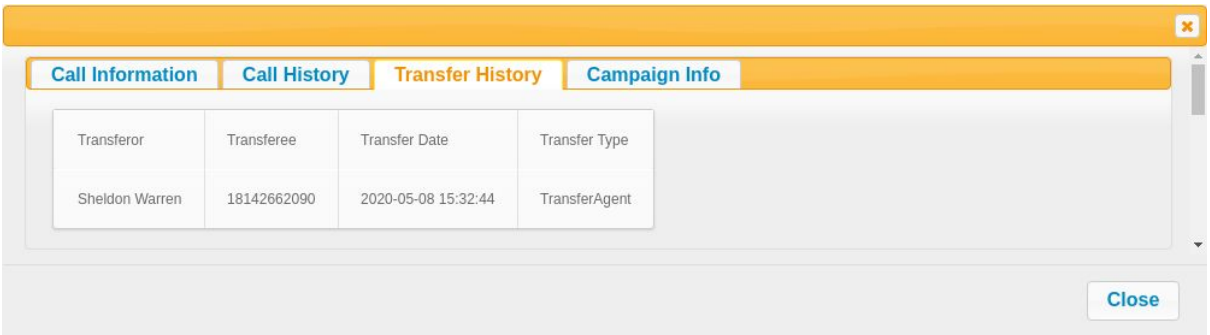


Category	Type	Start Date	Duration	Detail	Input
Queue	talking	2020-05-13 15:35:23	7	agent_name:yagiz.bostancioglu@alo-tech.com queue_name_get:inbound queue_name_active_call:inbound	
Hangup	Hangup	2020-05-13 15:35:30	0	release:False disposition:ANSWER	

Under the call history tab, information can be found, such as the call start time, duration, and when the call was disconnected.

Transfer History

By clicking the transfer history tab, **Transfer History** , the following screen will be displayed:



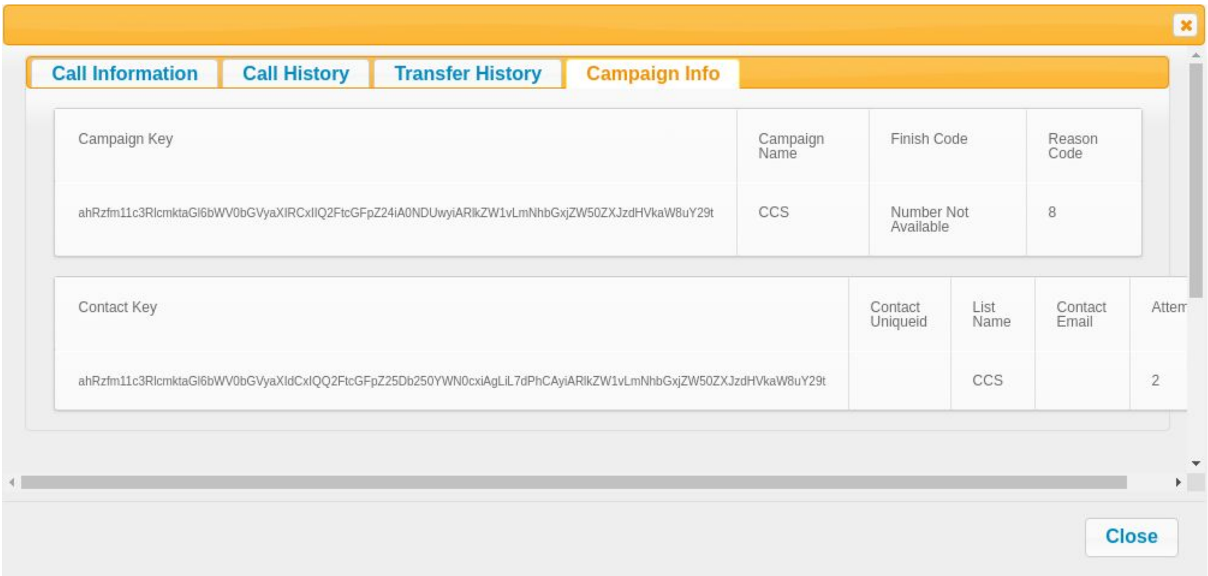
Transferor	Transferee	Transfer Date	Transfer Type
Sheldon Warren	18142662090	2020-05-08 15:32:44	TransferAgent

Tab information can be found under the transfer history, such as the transferor's name, transferee’s name, the transfer date, and the transfer type.

Campaign Info

By clicking the campaign info tab, 

, the following screen will be displayed:



Under the campaign, info tab information can be found, such as the campaign key, campaign name, finish code, reason code, contact key, list name, contact email, and the number of attempts.

Call Recordings

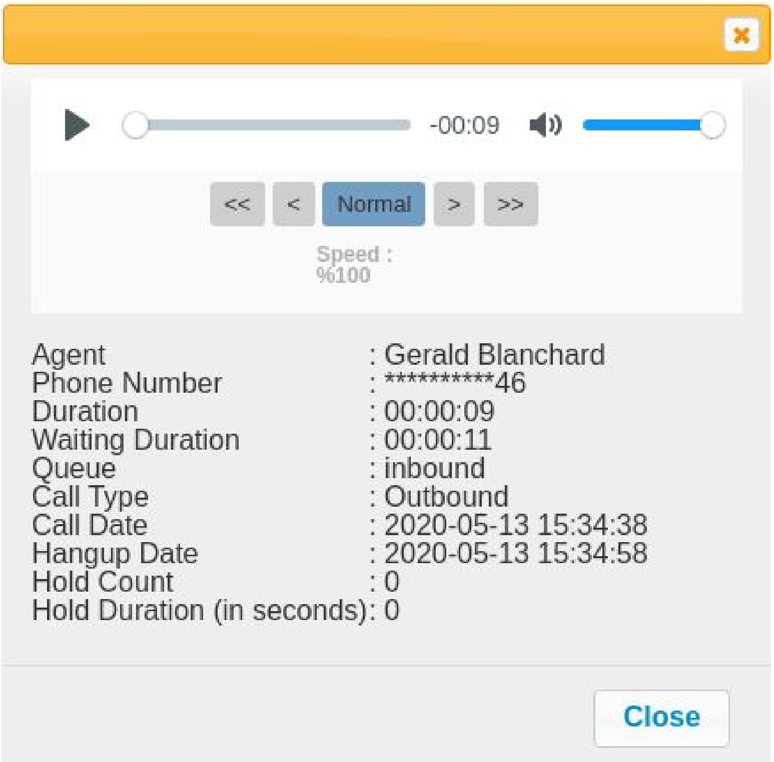
All calls are recorded by default when the call is in talking status. Recordings can be accessed by using the following buttons to the right of the call's row.

Downloading a Call Recording

1. Click the download button, , located to the right of the blacklist column.

Listening to a Call Recording

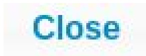
1. Click the listen button, , located to the right of the download button, , the following pop-up will be displayed:



2. Click the play button, , to listen to the recording.

Note: recording speed can be adjusted (Between 50% and 150%) using the bar shown below:

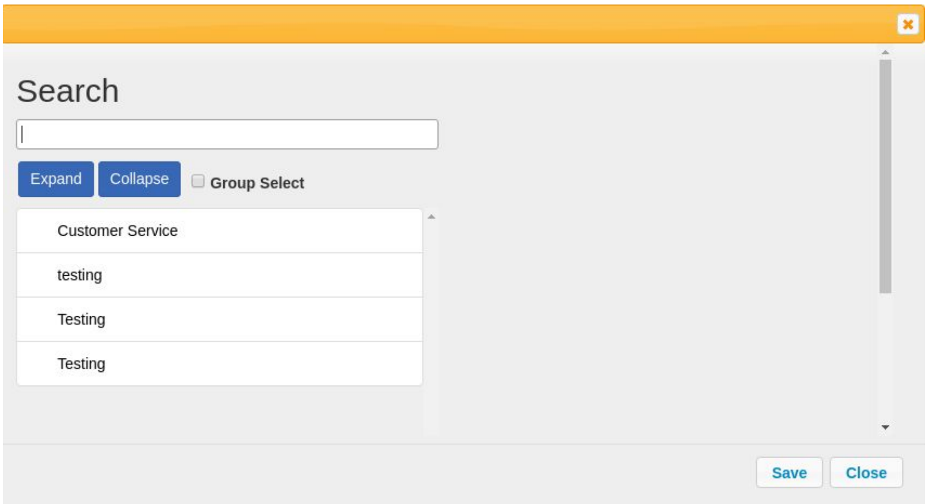
Note: volume can be adjusted using the bar shown below:

3. To exit the pop-up window, click the close button, 

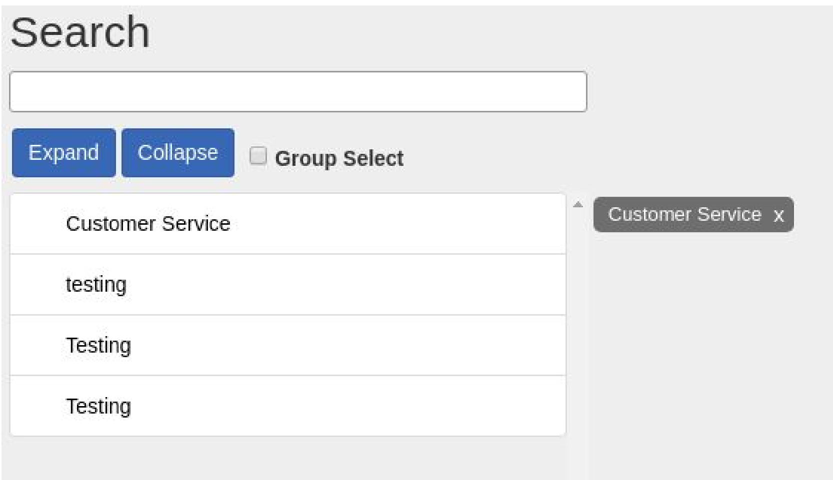
.

Tagging a Call

1. Click the tag button, , located to the right of the listen button, , the following pop-up will be displayed:



2. A list of created tags will be displayed. If multiple tags are used, the search input box can be used. Select the desired tag or tags from the tag list (Group tag selections can be made by clicking the Group Select checkbox. Once a tag has been selected, it will be displayed on the right of the tag listings as shown below:



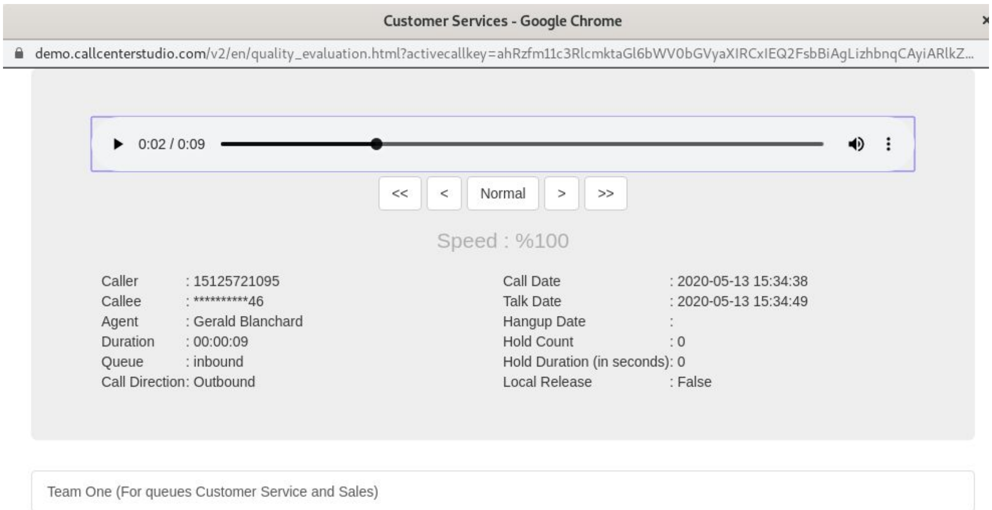
Note: Tags can be deselected from the call by clicking the X to the right of the tag's name.

3. Once all the desired tag selections have been made, click the save button, Save.

Note: More tags can be added while on the call if necessary by repeating steps 1 - 3. Also, previous tags that could not be changed by the agent and supervisor can be modified here.

<u>*Evaluating a Call*</u>

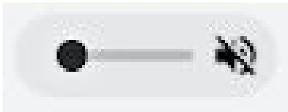
1. Click the evaluate button, , located to the right of the tag button, , the following pop-up will be displayed:



Note: An example evaluation was created (See Evaluations in the Administrator section).

Recording speed can be adjusted (Between 50% and 150%) using the bar shown below:

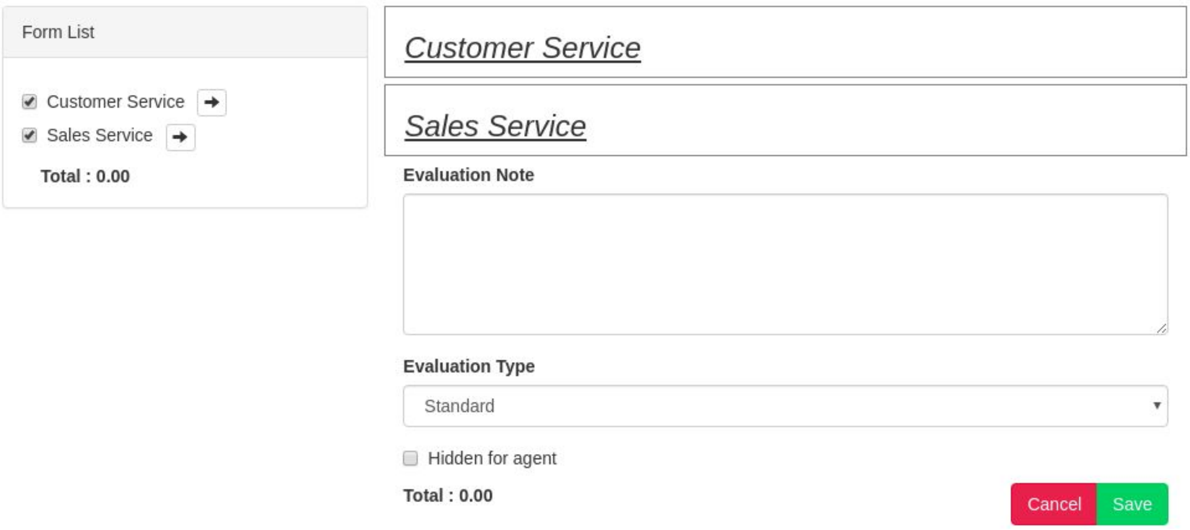
Volume can be adjusted by clicking and using the bar, as shown below:



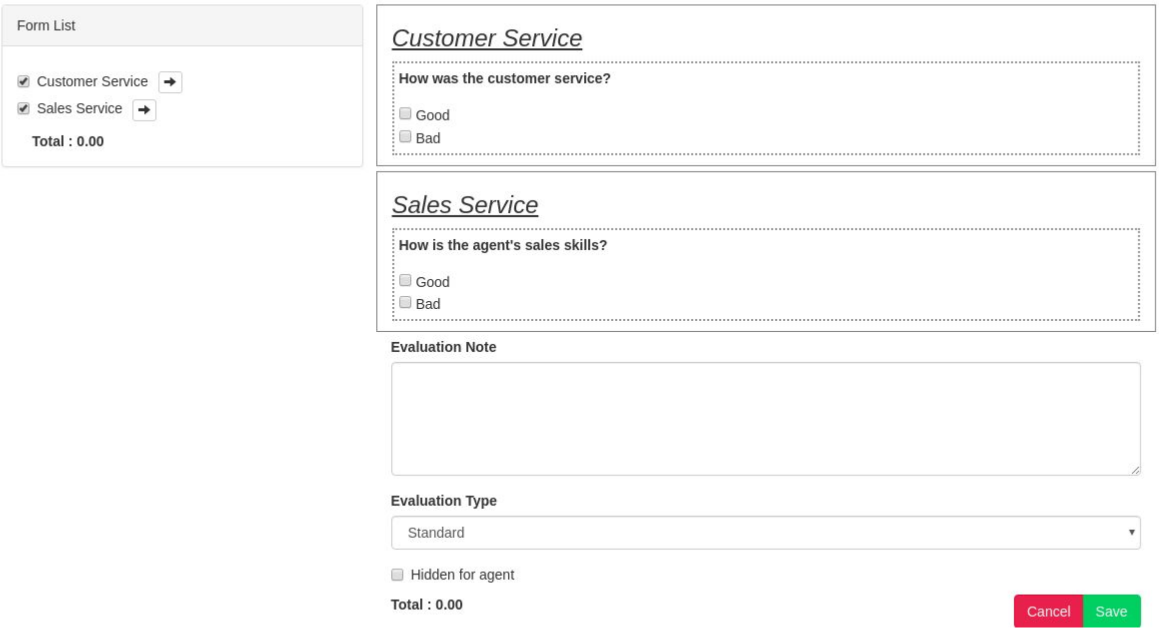
Call Recording can be downloaded by clicking the three vertical dots, , to the right of the volume button, . And then clicking download as shown below:

2. Click the evaluation desired an example survey is shown below:

3. After clicking, the evaluation will be visible. The example is shown below:



Note: If multiple forms are built into the evaluation, each form has to be clicked to expand each section. The expanded example form is shown below:



4. Fill out the necessary information on the form.

Note: By clicking the "Hidden for agent" checkbox, 

, the evaluation will not be able to be seen by the agent.

Note: On evaluation type, there are two types in the dropdown box:

Standard - Used for evaluating the agent

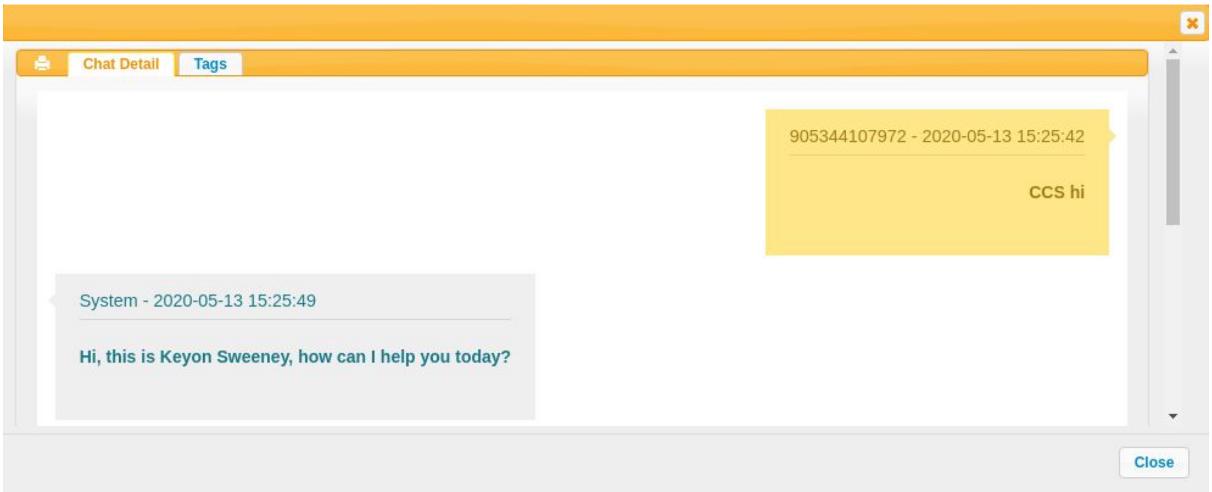
Control - Used to reevaluate the agent based on a customer concern.

5. Click the save button, 

.

Chat Records

Under the insert date column, click the desired chat insert date highlighted in orange for more details. The following pop-up screen will be displayed:



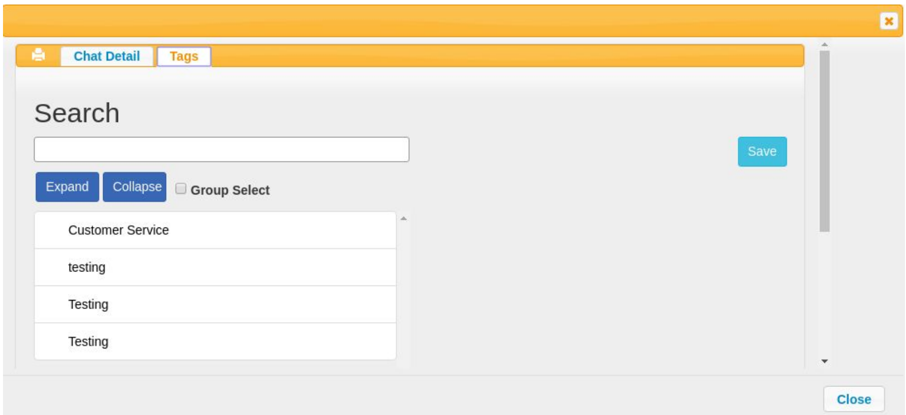
Chat Detail

The chat detail screen displays the chat in detail with customer and agent responses.

Note: The chat can be printed by selecting the print button, , located in the top left corner.

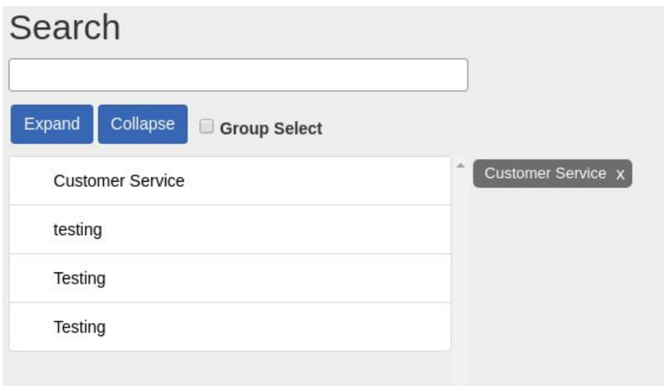
Tags

By clicking the Tags tab, , the following screen will be displayed:



Note: A call can also be tagged, by clicking on the tag button, , to the right of the subject column from the main Chat Records screen.

1. A list of created tags will be displayed. If multiple tags are used, the search input box can be used. Select the desired tag or tags from the tag list (Group tag selections can be made by clicking the Group Select checkbox. Once a tag has been selected, it will be displayed on the right of the tag listings as shown below:



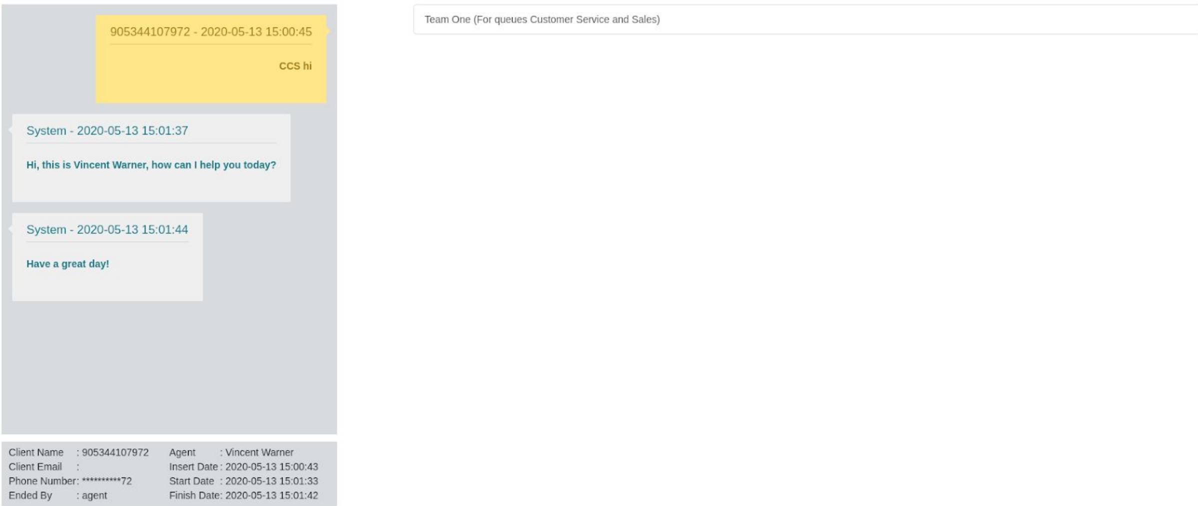
Note: Tags can be deselected from the call by clicking the X to the right of the tag's name.

2. Once all the desired tag selections have been made, click the save button, Save.

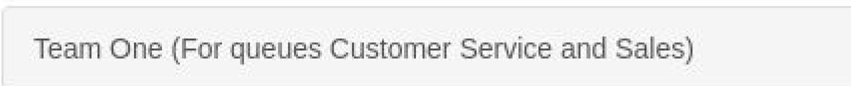
Note: More tags can be added while on the call if necessary by repeating steps 1 - 3. Also, previous tags that could not be changed by the agent and supervisor can be modified here.

Evaluating a Chat Record

1. Click the evaluate button, , located to the right of the tag button, , the following pop-up will be displayed:



2. Click the evaluation desired an example survey is shown below:



3. Fill out the necessary information on the form.

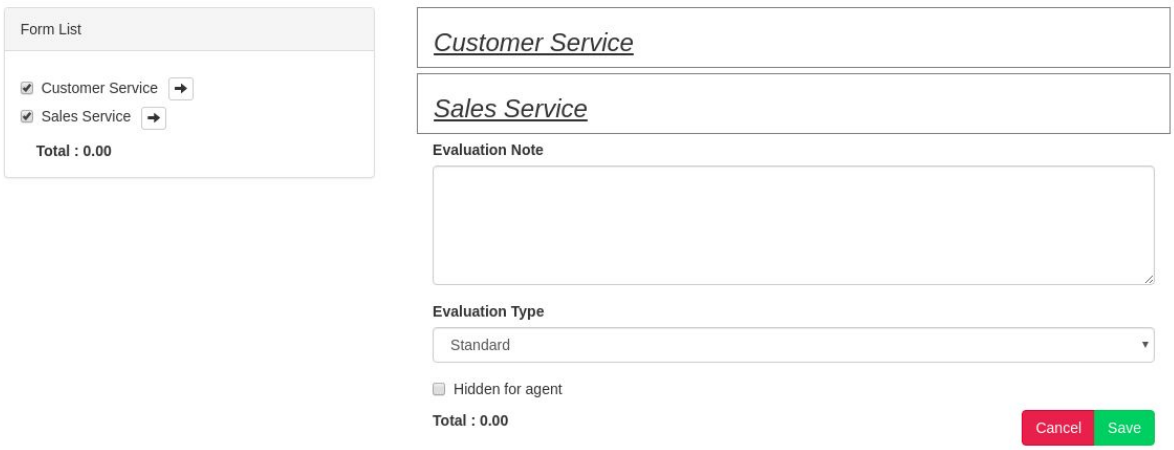
Note: By clicking the "Hidden for agent" checkbox, ☐ Hidden for agent *, the evaluation will not be able to be seen by the agent.*

Note: On evaluation type, there are two types in the dropdown box:

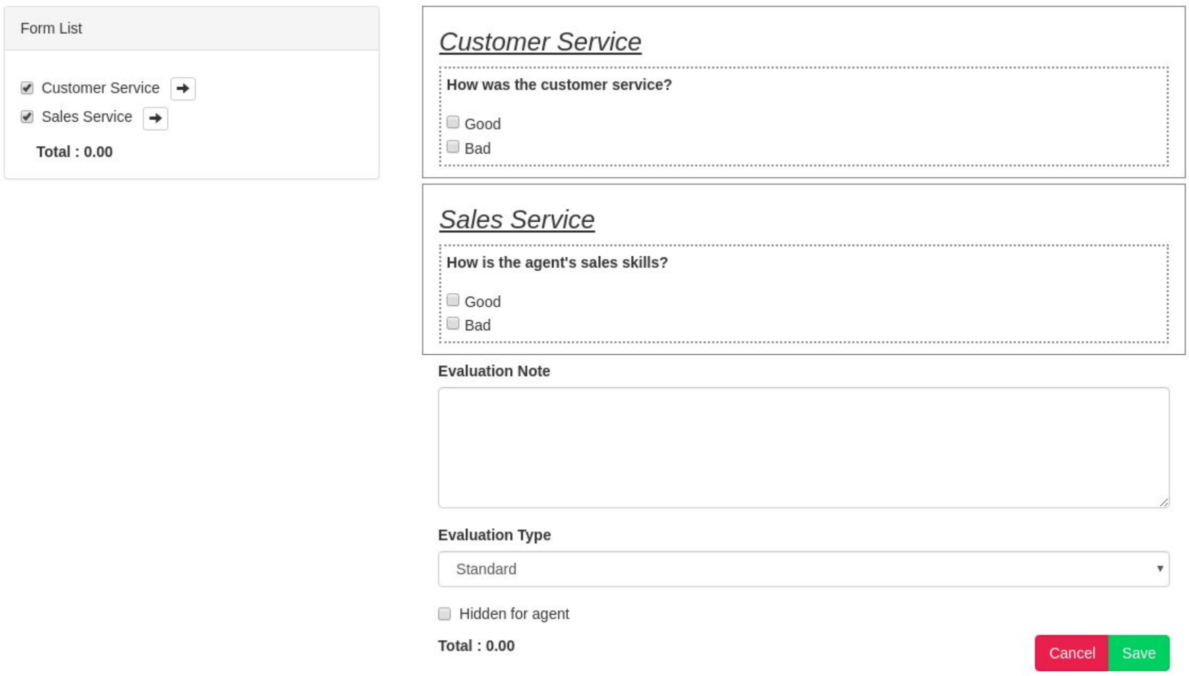
Standard - Used for evaluating the agent

Control - Used to reevaluate the agent based on a customer concern.

4. Click the save button, Save .
5. After clicking, the evaluation will be visible. The example is shown below:



Note: If multiple forms are built into the evaluation, each form has to be clicked to expand each section. The expanded example form is shown below:



Active Chats

Active chats can be viewed in the active chats tab. Information on the chat, such as start date and time, agent name, client name/phone number, client email, queue, status, parking start date, and duration, can be viewed in the active chats list.

Closing an Active Chat

1. Click the close button, , located to the right of the duration column, once clicked the following pop-up window will appear:

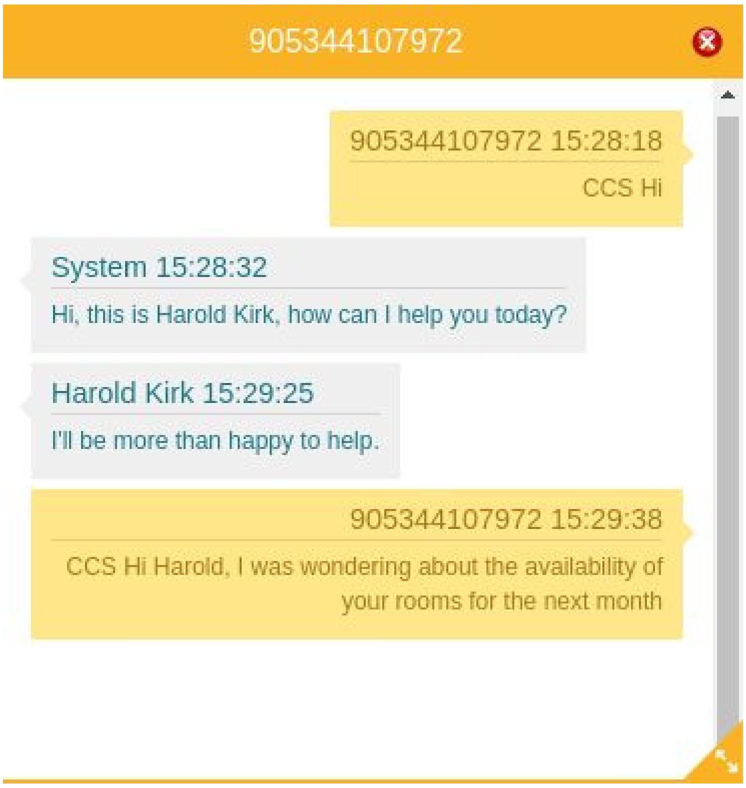
- *Select the cancel button,* Cancel *, to cancel the chat from being closed.*
- *Select the OK button,* OK*, to confirm the closing of the chat.*

2. Confirm by clicking the OK button, OK.

The screen will reload, and the closed chat will not be shown.

Viewing an Active Chat

1. Click the view/details button, , located to the right of the close button, , the following pop-up will appear:



2. Once viewing is complete, click the exit button, , to return to the active chat list.

Viewing Active Chats on Parking Status

In the top left corner of the Active chat list check the "Show Only Parking Status" checkbox as shown below:

Note: Only chats on parking status can be viewed when this checkbox is checked. Parking status is used so that the agent can park a chat to continue at a later point in time when the customer begins to chat again.

Abandoned Calls from Queues

Searching Abandon Calls from Queues

There are seven ways to search for abandon calls from queues explained below:

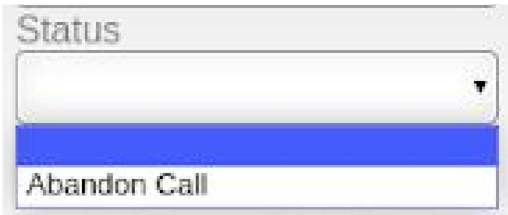
<u>*Number*</u>

1. Click the Number input box, type the desired phone number of the call records. An example is shown below:

2. Click the search button,  .

<u>*Status*</u>

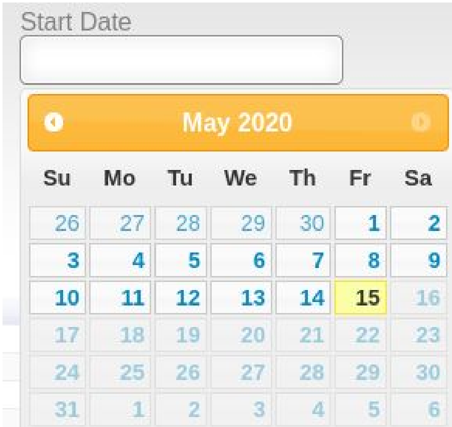
3. Click the Status dropdown box, select “Abandon Call” as shown below:



4. Click the search button,  .

Start Date

1. Click the start date input box. The following calendar pop-up window will appear:

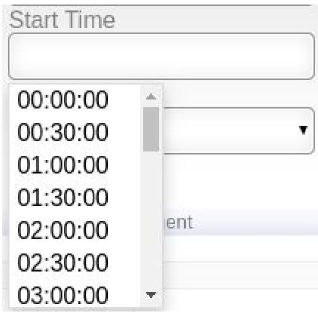


2. Click the desired start date

3. Click the search button,  .

Start Time

1. Click the start time input box. The following dropdown list will appear:

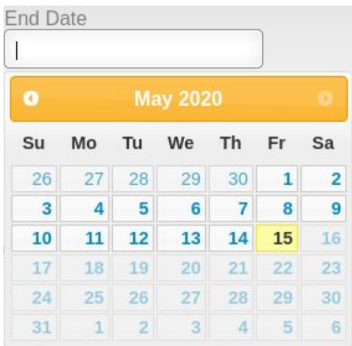


2. Select the desired start time.

3. Click the search button,  .

End Date

1. Click the end date input box. The following calendar pop-up window will appear:

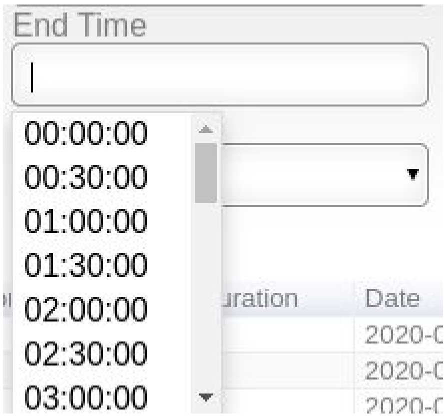


2. Click the desired end date

3. Click the search button,  .

End Time

1. Click the end time input box. The following dropdown list will appear:

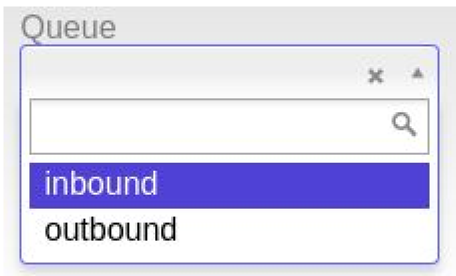


2. Select the desired end time.

3. Click the search button,  .

Queue

1. Click the queue input box. A dropdown list will appear. An example is shown below:



2. Click the desired queue.

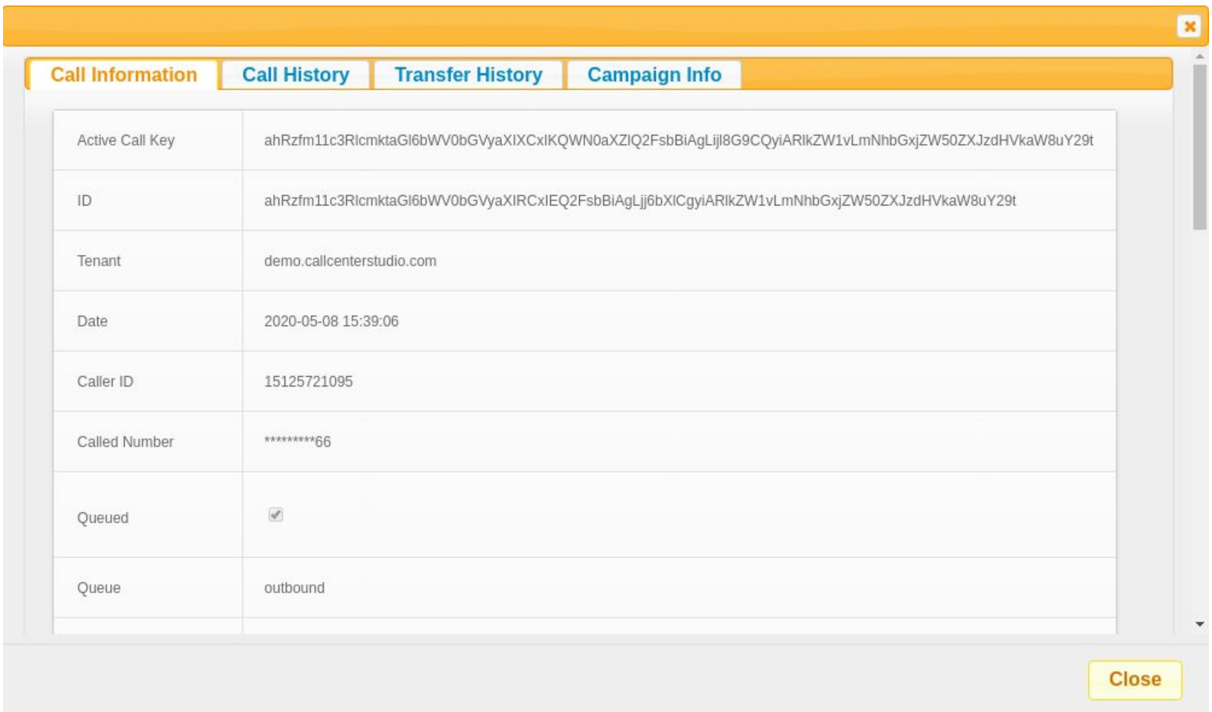
3. Click the search button,  .

Transferred Calls

Transferred can be viewed in the assigned calls tab. Information on the transfer such as transfer date and time, custom ID, transferor, transferee, transfer type, initial queue, and last-agent-spoken-to can be viewed in the transferred calls list.

Accessing Transfer Details

1. Click the info button, i , located in the detail column for the desired transfer. The following pop-up window will appear:



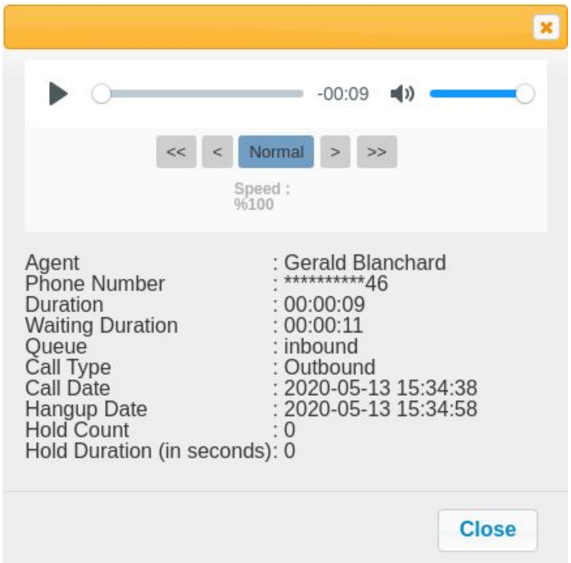
Note: For more information on this pop-up window, see ***Call Information, Call History, Transfer History, and Campaign Info Sections*** *found under Accessing Call Details.*

<u>Downloading a Transferred Call Recording</u>

1. Click the download button, , located to the right of the blacklist list column.

<u>Listening to a Transferred Call Recording</u>

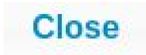
1. Click the listen button, , located to the right of the download button, , the following pop-up will be displayed:



2. Click the play button, , to listen to the recording.

Note: recording speed can be adjusted (Between 50% and 150%) using the bar shown below:

Note: volume can be adjusted using the bar shown below:

3. To exit the pop-up window, click the close button, 

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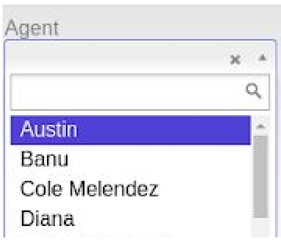
Searching Transferred Calls

There are six ways to search for transferred calls, as shown below (more than one search feature can be used at the same time):

Agent

1. Click the agent input box. An example dropdown list is shown below:



2. Select the desired agent

3. Click the search button,  .

Transfer Type

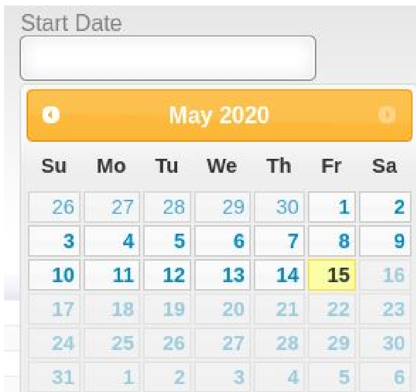
1. Click the transfer type input box. A dropdown list will appear. An example list is shown below:

2. Select the desired transfer type.

3. Click the search button,  .

Start Date

1. Click the start date input box. The following calendar pop-up window will appear:

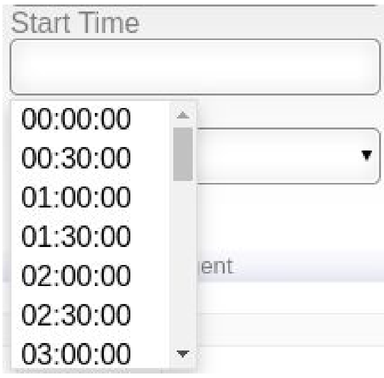


2. Click the desired start date

3. Click the search button,  .

Start Time

1. Click the start time input. The following dropdown list will appear:

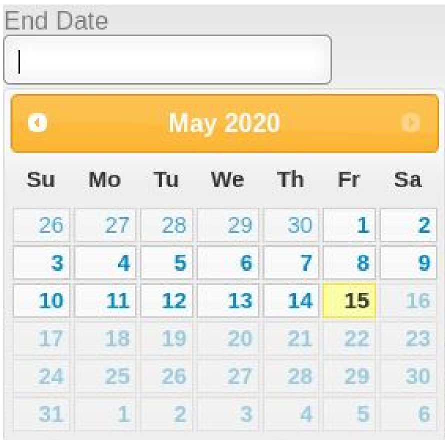


2. Select the desired start time.

3. Click the search button,  .

End Date

1. Click the end date input box, the following calendar pop-up window will appear:

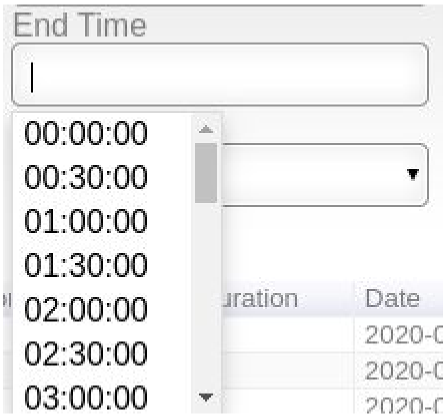


2. Click the desired end date

3. Click the search button,  .

End Time

1. Click the end time input box, the following dropdown list will appear:

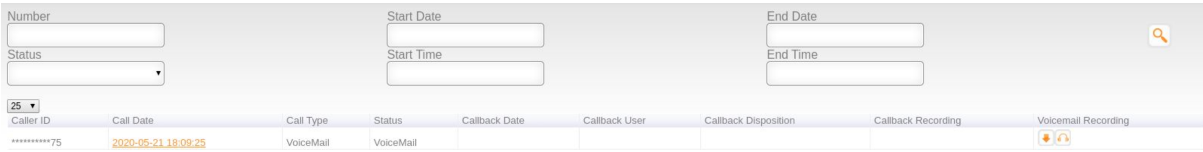


2. Select the desired end time.

3. Click the search button,  .

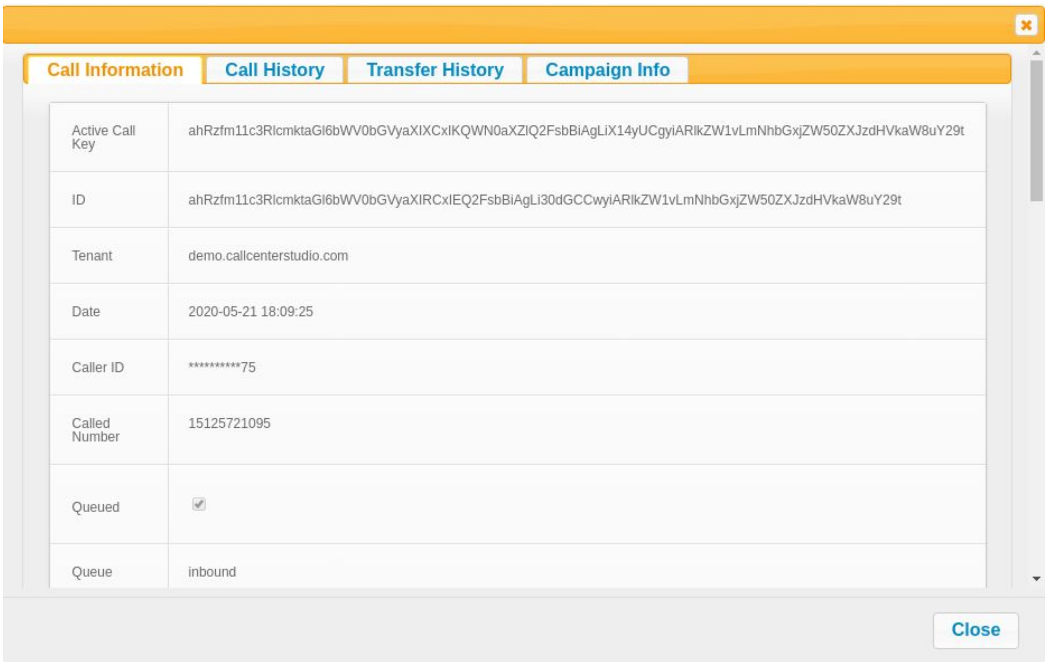
Voicemail & Callback Request Calls

The Voicemail & Callback Request Screen is shown below:



Accessing Voicemail & Callback Request Details

1. Click the desired orange highlighted date located under the Call Date column. The following pop-up will appear:



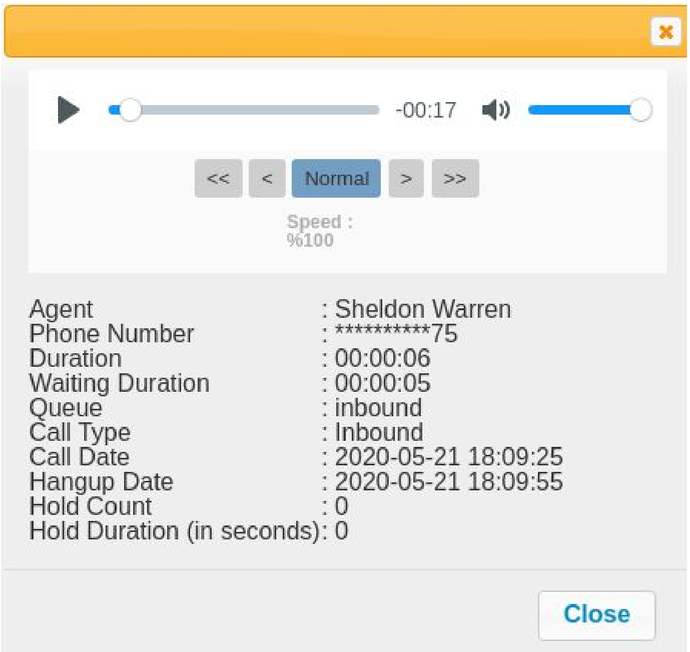
Note: For more information on this pop-up window, see ***Call Information, Call History, Transfer History, and Campaign Info Sections*** *found under Accessing Call Details.*

Downloading a Voicemail / Callback Request Recording

1. Click the download button, , located in the Voicemail recording column.

Listening to a Voicemail / Callback Request Recording

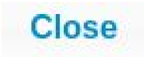
1. Click the listen button, , located to the right of the download button, , the following pop-up will be displayed:



4. Click the play button, , to listen to the recording.

Note: recording speed can be adjusted (Between 50% and 150%) using the bar shown below:

Note: volume can be adjusted using the bar shown below:

5. To exit the pop-up window, click the close button, 

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Searching Voicemail & Call Back Request Calls

There are six ways to search for voicemail & call back request calls, as shown below (more than one search feature can be used at the same time):

Number

1. Click the Number input box, type the desired phone number of the call records. An example is shown below:

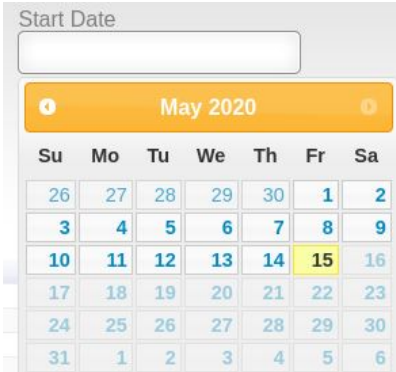
2. Click the search button,  .

Status

Denotes the status of the call as "Voicemail."

Start Date

1. Click the start date input box. The following calendar pop-up window will appear:

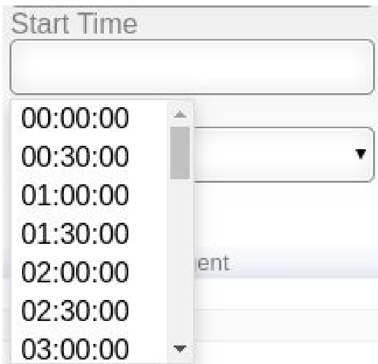


2. Click the desired start date.

3. Click the search button,  .

Start Time

1. Click the start time input box. The following dropdown list will appear:

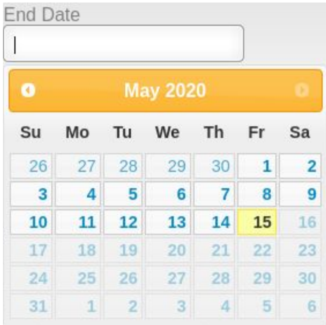


2. Select the desired start time.

3. Click the search button,  .

End Date

1. Click the end date input box, the following calendar pop-up window will appear:

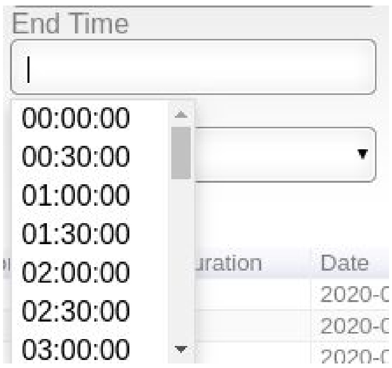


2. Click the desired end date

3. Click the search button,  .

End Time

1. Click the end time input box. The following dropdown list will appear:

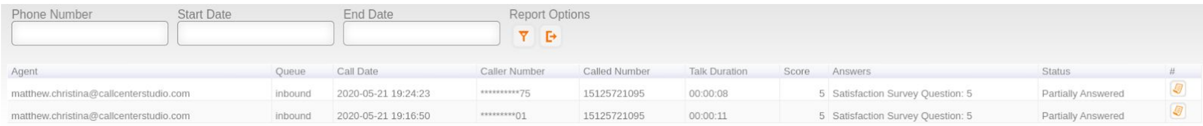


2. Select the desired end time.

3. Click the search button,  .

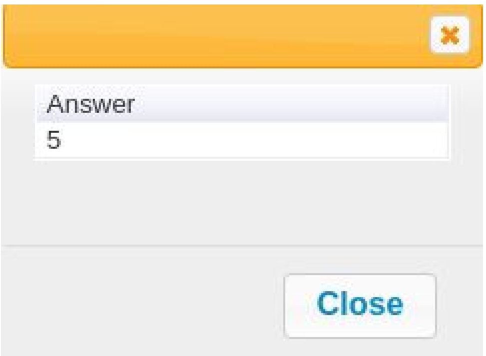
Satisfaction Survey

The Voicemail & Callback Request Screen is shown below:



Viewing Satisfaction Survey Result

1. Click the detail button, , the following pop-up window will appear an example result is shown below:



Filtering Satisfaction Survey

1. To filter the satisfaction surveys, write the preferred phone number or duration of the selection.
2. After all the desired selections have been entered, click the filter button, , to see the filtered list.

Exporting Satisfaction Surveys

1. Filtered satisfaction surveys list can be exported in excel format by clicking on the, , export button.

Note: using the records filter, 

, up to a 100 call records can be shown on a single page in the Call Center Studio tenant.