Quality Evaluation Layout
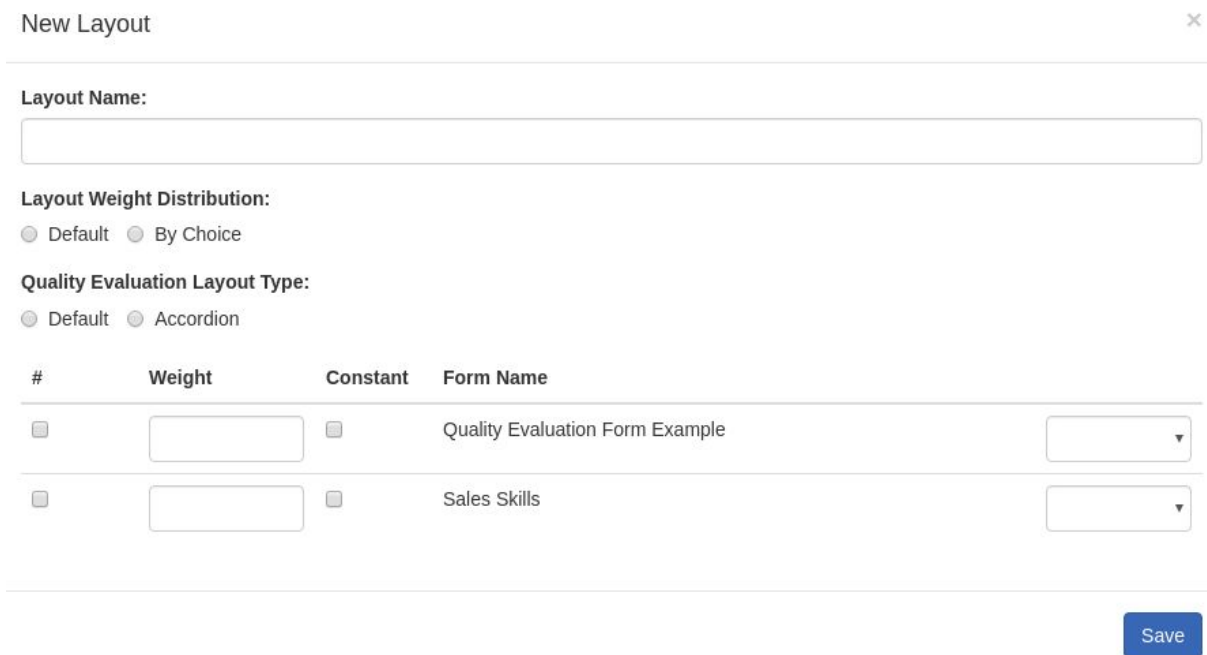

*The Quality Evaluation Layout is used once a Quality Evaluation form has been created under the Quality Evaluation Form module (See **Quality Evaluation Form** section for creating a Quality Evaluation Form). Using this section, form layouts can be designed, and weights can be given to forms as well. Also, form layouts can be made active or passive.*

Creating a Quality Evaluation Layout

1. Click the Plus button, [+] , in the top right-hand corner of the Quality Evaluation

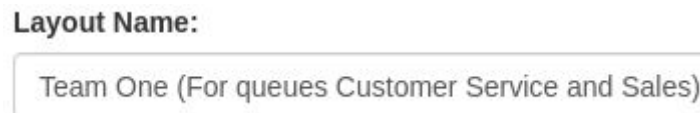   Form screen, the following pop-up window will appear as shown below:

2. Click the "Layout Name" input box, type the desired layout name as shown below:

3. Under "Weight Layout Distribution" select from the following options explained below:

◉ Default

Default weight distribution: If using multiple forms, default weight distribution will assign 100 % weight to each form.

◉ By Choice

By Choice weight distribution: allows different weights to be assigned to each form. For example: Team One has two layouts: sales service and customer service. Agents from team one are assigned to both of these queues. Management determined the agent's customer service score should have a higher value placed on it than the sales service score. To do this, the "By Choice" button will need to be selected. (Further directions on assigning specific weights is explained in detail in the following steps).

4. Under "Quality Evaluation Layout Type" select from the following options explained below:

Default evaluation layout type: displays the default form layout under the Quality Control tab (Determines how the supervisor will see the forms).

○ Default

Accordion evaluation layout type: displays the accordion form layout under the Quality Control tab (Determines how the supervisor will see the forms).

○ Accordion

Default View (Under Quality Control Tab), seen while evaluating an agent:

Customer Service

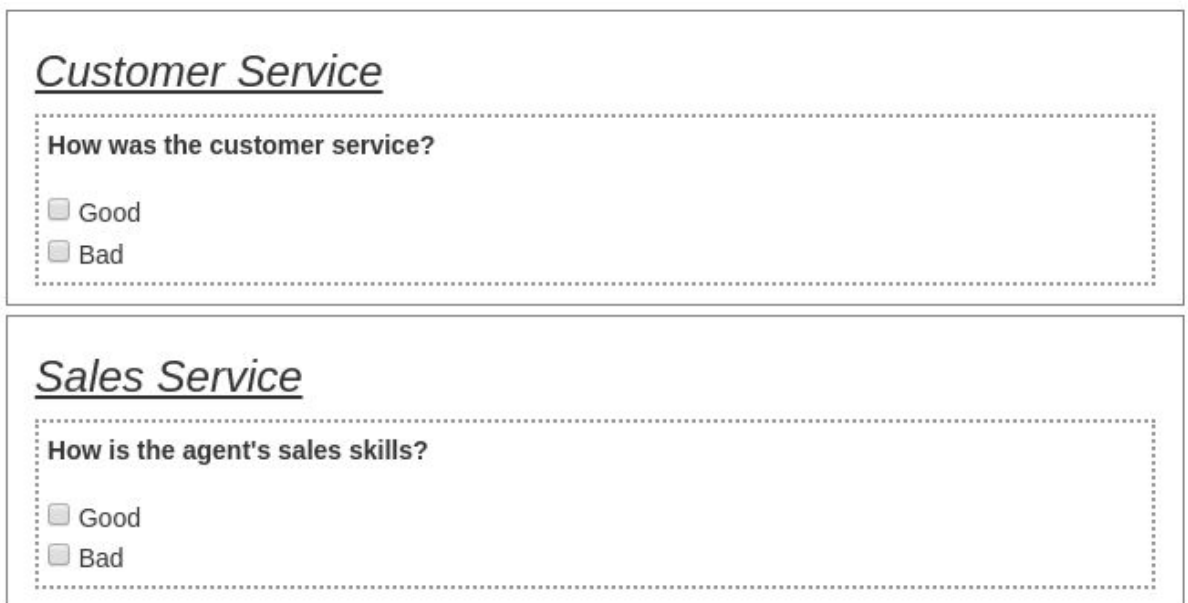How was the customer service?

☐ Good
☐ Bad

Sales Service

How is the agent's sales skills?

☐ Good
☐ Bad

Accordion View (Under Quality Control Tab), seen while evaluating an agent:

Accordion View after clicking each form (Under Quality Control Tab), seen while evaluating an agent:

5. Under the "#" there is a checkbox for each form. In this example we have created two forms, each form has a checkbox under the "#" (Click the checkbox if you want the form to be visible when the supervisor is in the Quality Control Tab) an image of the checkboxes is shown below:

6. Under "Weight," there is an input box for each form. In this example, we have created two forms: Customer Service and Sales Service. Management wants Customer Service to hold a higher weight in the agent evaluation than Sales Service to do this; we can assign a higher weight to the Customer Service form as demonstrated below:

7. Under Constant, there is a checkbox for each form. The checkboxes, if selected, make the forms mandatory. In this example, since Team One may be using different queues, the Constant checkboxes have not been selected so that the supervisor can fill out the evaluation form that pertains to the specific call an example is shown below:

8. If using multiple forms, click the dropdown menu to the right of the form name match the form name with the corresponding dropdown selection as seen below:


9. Click the Save button, , the created form layout will be visible under the Form Name list shown below:

10. When a form is first saved, the status of the form by default is passive, meaning the supervisor under the quality control screen will not be able to see the form to evaluate the agent. Click the Passive button, , to the right of "Update Date." The Passive button will change to the Active Button, , as shown below:

Update Date

2020-04-16 19:50:41		
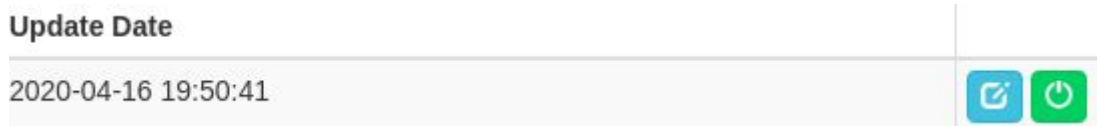
The form layout is set, and the supervisor can begin to review agents.

Editing a Quality Evaluation Form

1. Select the Edit button, , located to the right of the update column as seen below:

Update Date
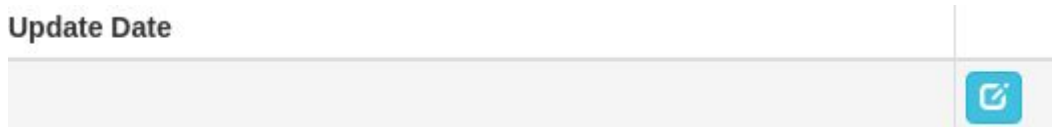
After clicking the edit button, the following pop-up window will appear:

New Layout   ×

Layout Name:

Team One (For queues Customer Service and Sales)

Layout Weight Distribution:

◉ Default   ○ By Choice

Quality Evaluation Layout Type:

○ Default   ◉ Accordion

#	Weight	Constant	Form Name	
☑	70	☐	Customer Service	Customer Service ▾
☑	30	☐	Sales Service	Sales Service ▾

Save

2. Make edits as necessary (Refer to the **Creating a Quality Evaluation Layout** section for assistance)

3. Click the Save button, Save , the created form layout will be visible under the Form Name list shown below:
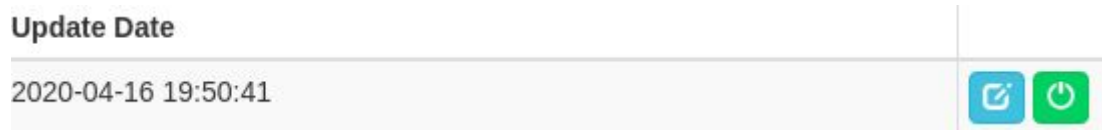
☐	**Form Name**
☐	Team One (For queues Customer Service and Sales)

4. Click the Passive button, , to the right of "Update Date." The Passive button will change to the Active Button, , as shown below:
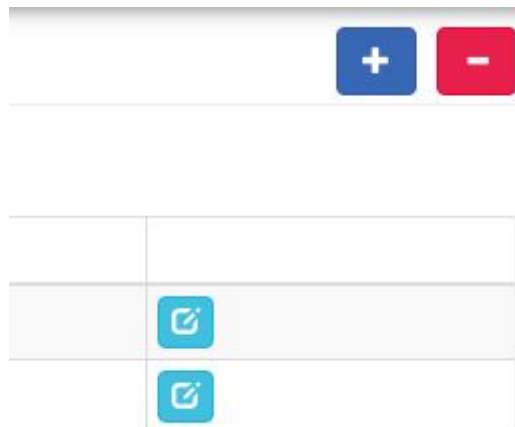
Update Date

2020-04-16 19:50:41

The edited form layout is set, and the supervisor can begin to review agents.

Deleting a Quality Evaluation Layout

1. Select the checkbox to the left of the form's name, as shown below:

2. Press the Delete button, , located in the top right corner of the form name list screen as shown below:
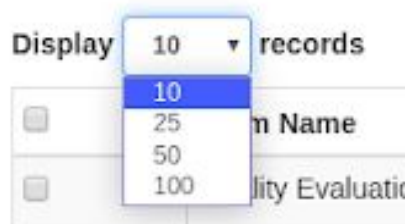

Note: after clicking the Delete button, the form layout will be deleted forever, no confirmation screen will be displayed.

Searching for a Quality Evaluation Layout

There are two ways to search for a Quality Evaluation Form, as explained below:

Manually

1. Click the "Display records" dropdown box the following will be displayed:

Note: up to 100 forms can be displayed on a single screen. If more than 100 are present,

simply use the Previous button, Previous *, and/or Next button,* Next *. These buttons are*

located in the middle at the bottom of the Form Name list.

Key Word Search

1. Click the "Search:" input box, type part of the form layout name, insert date, or

   update date to filter the form list automatically.