NEXTIVA CONTACT CENTER

ADMIN GUIDE

CX TRAINING TEAM
VERSION 1.01

This Administrator Guide

The Administrator Guide for Nextiva Contact Center is your essential resource for mastering Nextiva Contact Center administration. Inside, you'll find detailed instructions and explanations for a wide range of tasks, empowering you to effectively manage users and configure system settings.

This guide covers key areas such as:

- User Management: Learn how to create, delete, and modify user accounts, assign roles and permissions, and manage locations and skills.
- System Configuration: Configure crucial components like call flows, business events, holiday schedules, Do Not Call lists, and recordings.
- Campaign Management: Set up and manage campaigns, including associated addresses, recordings, goals, and dispositions.
- Reporting and Monitoring: Utilize the Audit Log to track system activities and generate reports to gain insights into contact center performance.

With clear, step-by-step guidance, this manual equips you to optimize your Nextiva Contact Center, streamline operations, and enhance overall efficiency.

Table of Contents

Managing User Profiles

Welcome to the Nextiva Contact Center Call Center Admin Guide! As an administrator, you're responsible for managing users within the system. This section provides an overview of the different user profile types and their respective roles. Remember, this guide is designed for voice-only interactions (chat and SMS).

User Types

Within Nextiva Contact Center Call Center, users fall into three main categories:

- **Agents:** These are your frontline communicators. Agents directly engage with customers through various channels like chat and SMS, addressing their questions and concerns. They're assigned to specific campaigns and queues to ensure efficient customer service.

- **Supervisors:** Supervisors play a crucial role in overseeing agent activities, managing queues, and handling outbound lists and work items. They have real-time monitoring capabilities, can assist agents on active work items, and generate reports to track performance.

- **Administrators:** You, as an administrator, hold the highest level of access. You're responsible for creating users, setting up campaigns, managing queues, configuring recordings and voicemail, and handling various other system settings.

User Guides

To help each user type navigate the system effectively, we've created dedicated user guides:

- **Agent Guide**: This NCC Call Center Agent guide provides agents with step-by-step instructions on using the system to manage chat and SMS interactions, including how to handle customer inquiries, escalate issues, and utilize available resources.

- **Supervisor Guide**: The NCC Call Center Supervisor guide equips supervisors with the knowledge to monitor agent performance, manage queues, handle outbound communications, and generate reports for analysis.

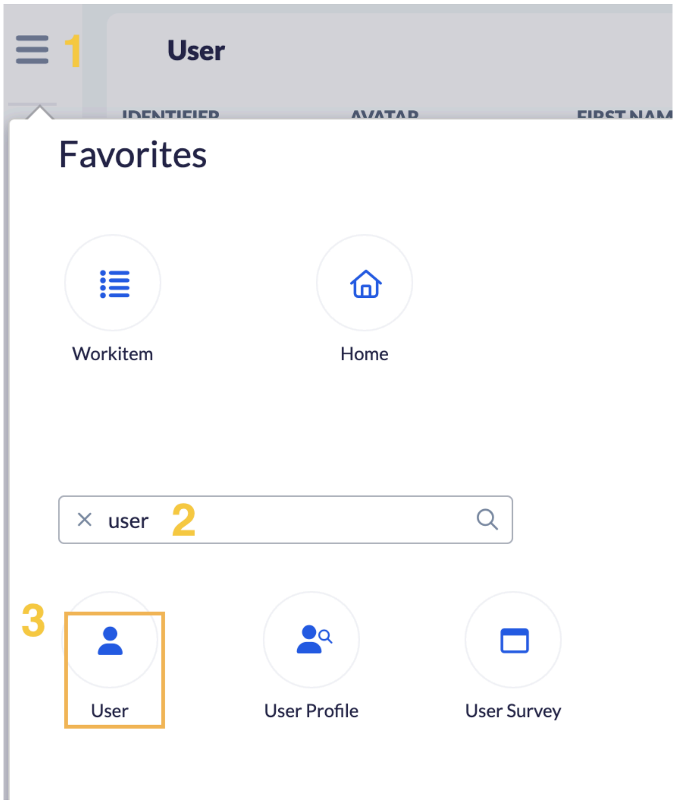
- **Administrator Guide:** This guide offers comprehensive instructions on user management, system configuration, and other administrative tasks.

By understanding the distinct roles and responsibilities of each user type, you can effectively manage your Nextiva Contact Center and ensure optimal performance across your team.

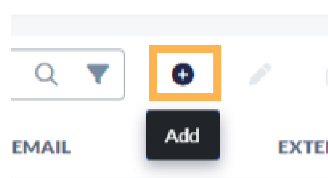
Managing Users

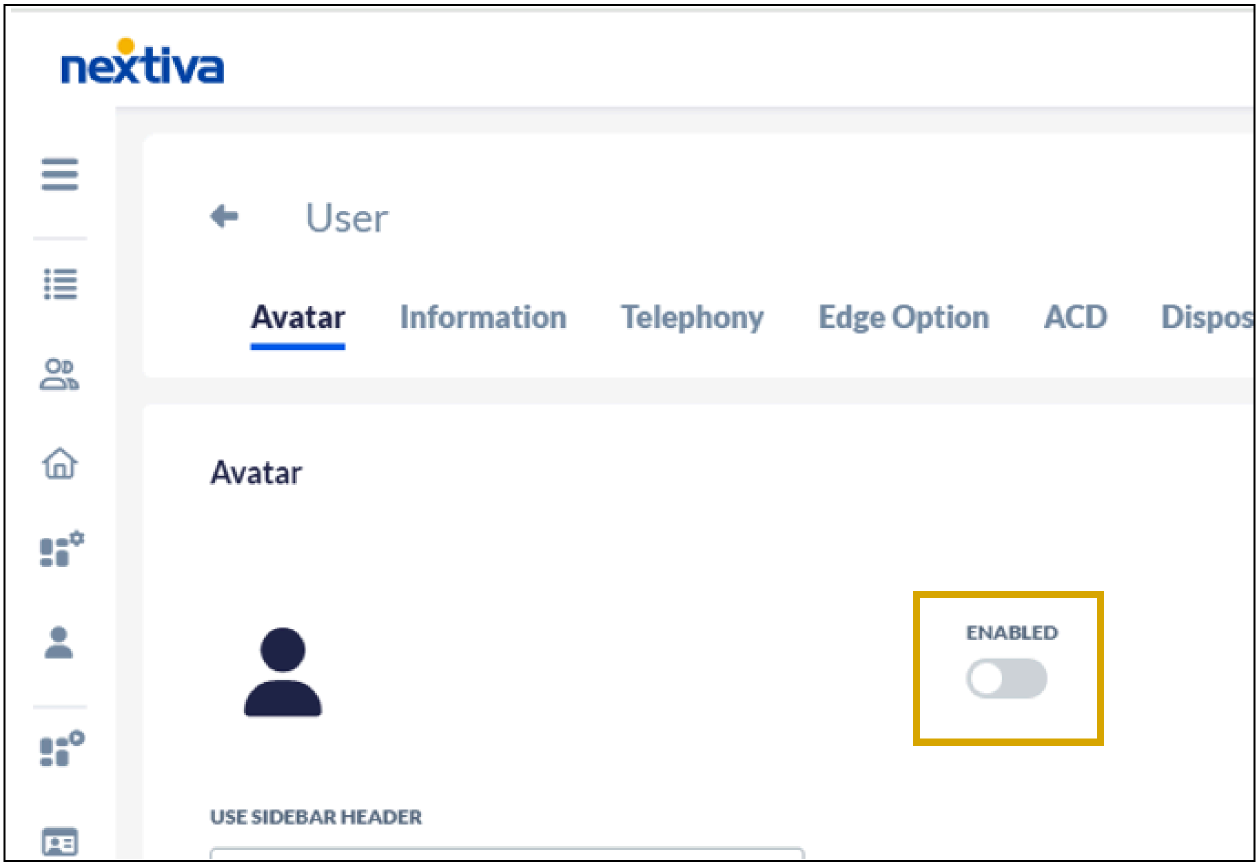
Creating New Users

1. You can add users by going to the **Options Menu** in the Navigation Bar.



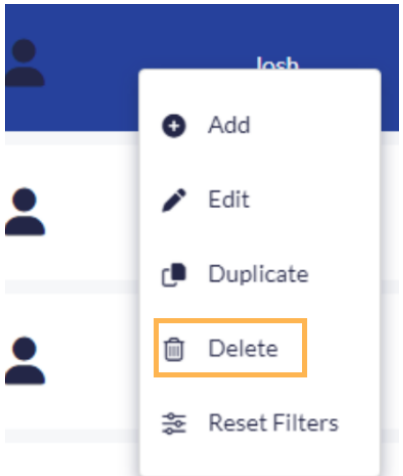
2. In the Search Bar, type the word **User**.
3. Select the **User** icon. You will be directed to a list of users.
4. Select the **+** icon next to the search bar. You will be directed to a new user configuration page.
5. When creating a new user, remember to toggle **ON** the “**Enable**” switch.




nextiva
User
Avatar
Information
Telephony
Edge Option
ACD
Dispos
Avatar
ENABLED
USE SIDEBAR HEADER

Deleting Users

1. From the User Page, select the user of your choice.
2. Select **delete**.

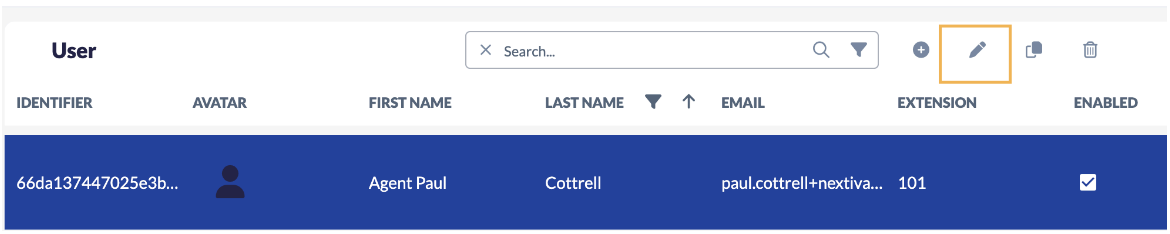


XBert Tip: Even though a user can be deleted, their statistics can still be reported using an SQL query. Please reach out to Nextiva Support for more assistance.

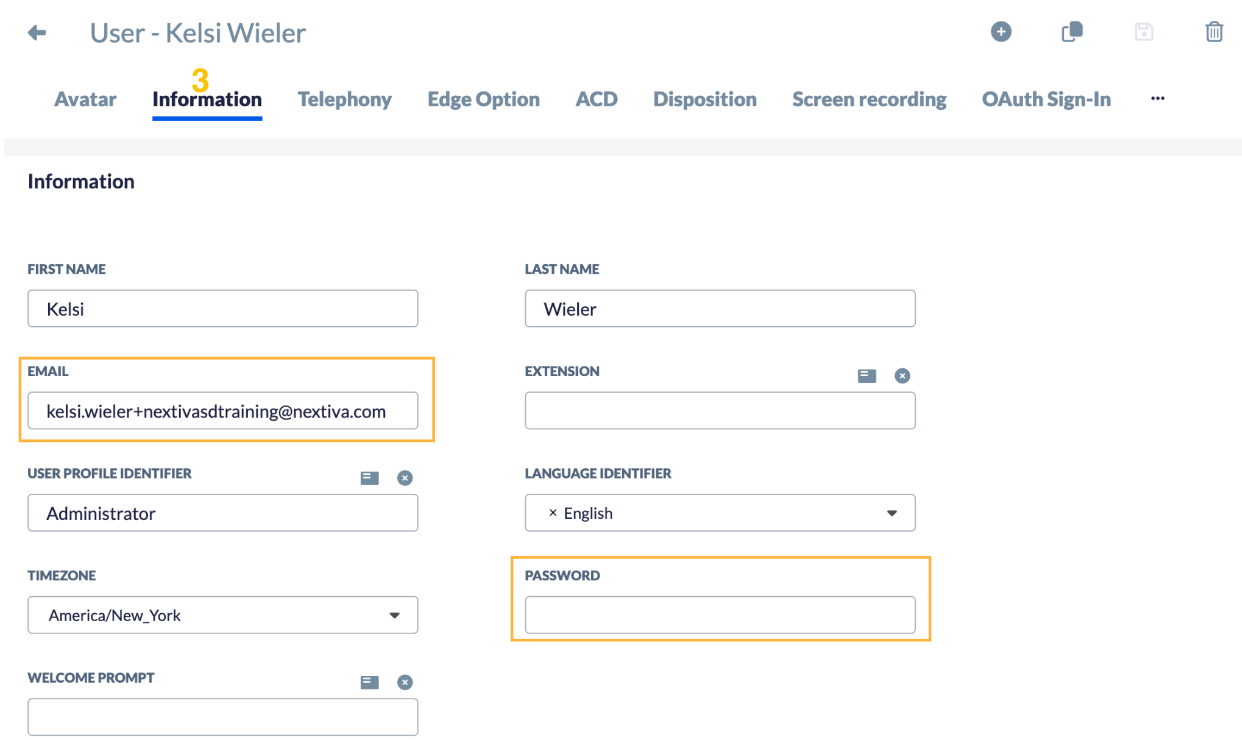
Changing emails or passwords

1. From the list of users, scroll down to the necessary user
2. Right click on the **User** and select **Edit**.

   XBert Tip: You can also select the edit (pencil) icon.



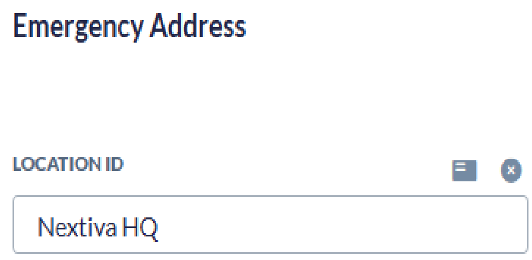
3. Select the Information Tab or Scroll down to the Information Section.
4. Edit the user's email or password.



XBert Tip: Be careful what you edit here! Some changes are hard to reverse. We suggest keeping changes limited.

Managing User Location

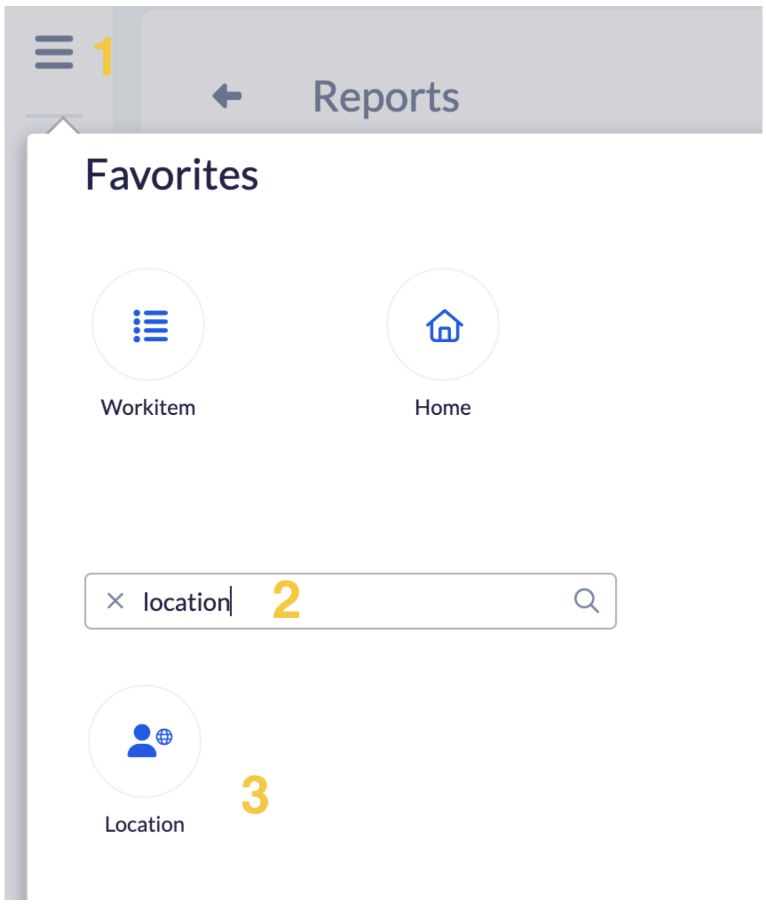
1. From the list of users, double-click on the selected user.
2. Select the Emergency Address Tab and you will be able to edit the user's Emergency Location.



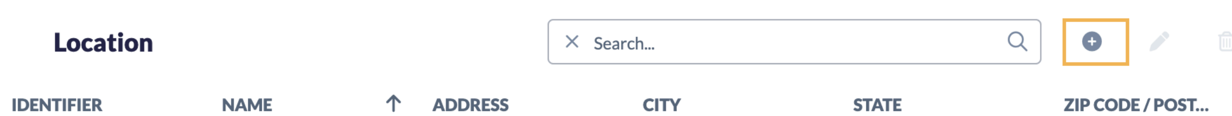
XBert Tip: You must [build the Location] before you can add it to a user.

Create a Location

1. Once you are logged in as an administrator, go to the Options Menu.



2. Search for “Location”.
3. Select the **Location** icon.
4. Select the plus sign (+) to add the location.



5. Enter the relevant information:

    a. Name

    b. Address

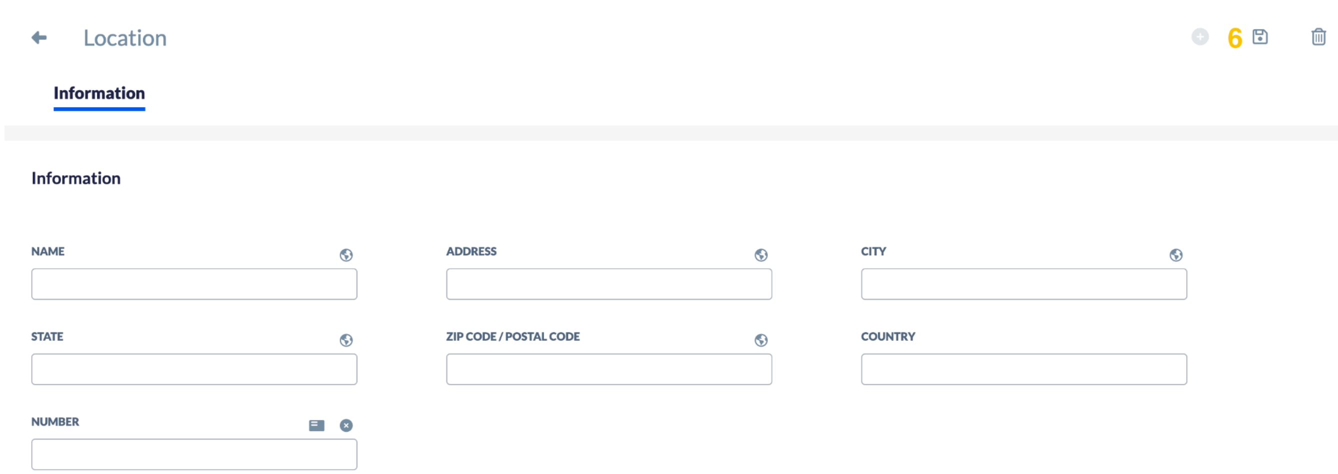
    c. City

    d. State

    e. Zip Code/Postal Code

    f. Country

    g. Number



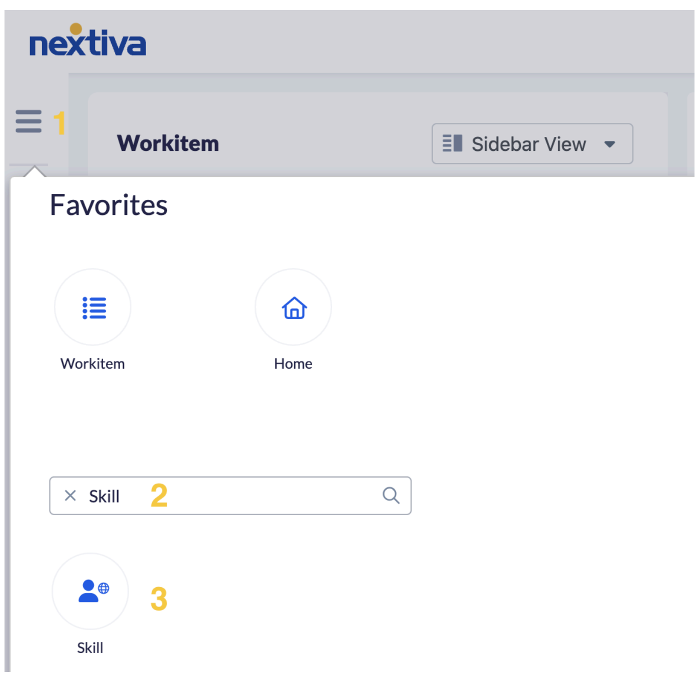
6. Select the **Save** (floppy disk) icon to save the new location.

Skill-Based Routing

Skills are a crucial component of efficient call routing in Nextiva Contact Center. They allow you to categorize agents based on their expertise and route calls to the most qualified individuals.

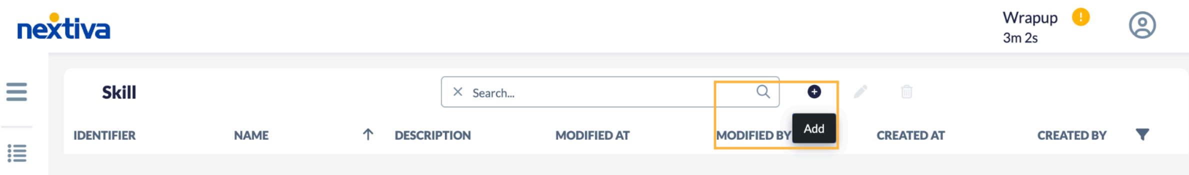
Accessing Skills

1. Once you are logged in as an administrator, go to the **Options Menu**.
2. In the options menu, search “Skill”
3. Select **Skill**.

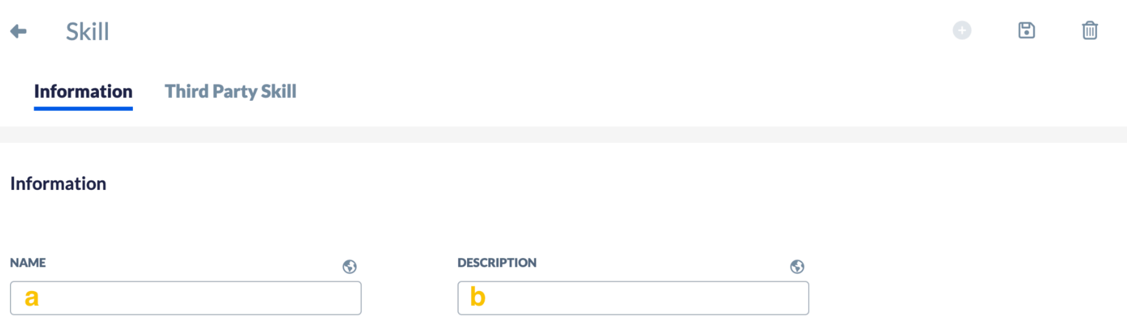


Create a Skill

1. Select the **Plus** (+) button to open the skill creation form.



2. Enter Skill Details.



   a. **Name:** Provide a clear and concise name for the skill (e.g., "Technical Support," "Billing Inquiries"). You can use the globe icon to enter the name in different languages.

   b. **Description:** Add a detailed description of the skill, outlining the specific expertise it represents. You can also use the globe icon to enter the description in different languages.

3. Select the **Save** (floppy disk) icon to create the skill.

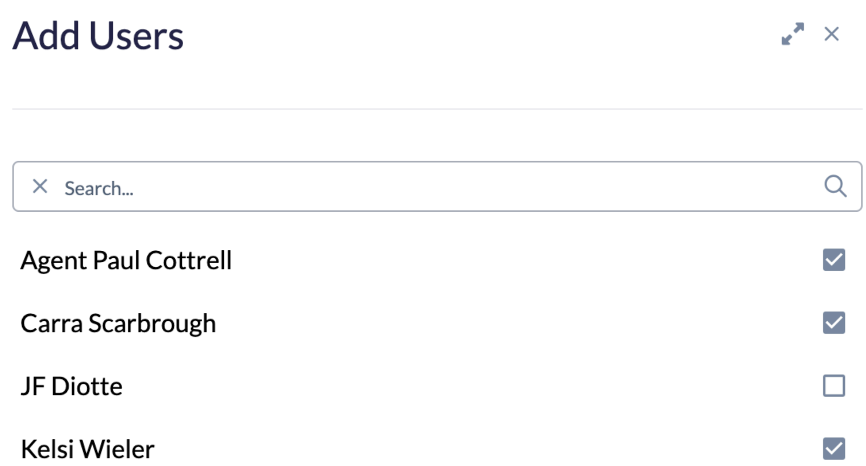
Adding Users to a Skill

Once the skill is saved, the options to add Users to the skill will populate.

Follow the Creating a Skill steps before proceeding.

1. Select the **plus** sign (+) to add more users.

2. Check the box of the users you would like to add.

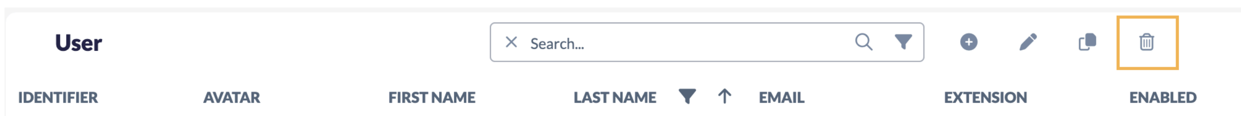


3. Select **OK**.

Removing a User from a Skill

1. Select the name of the user you would like to remove from the skill.

2. Select the **delete** (trash can) icon to delete the user.



Types of Skills

Nextiva Contact Center supports two primary types of skills: Third-party and first party.

First-Party Skills

These skills apply to your internal agents. When a call comes in with a specific skill associated with it (e.g., "Spanish speaker"), the system routes it to an available agent who also possesses that skill. This ensures customers with specific needs are connected to agents equipped to handle them.

XBert Tips: If a lead has no associated skill, it is routed to the agent who has been available the longest, regardless of their skills.

Third-Party Skills

These skills are used to route calls from external sources, like dialers, to your agents. For example, if your dialer is calling leads for a specific product promotion, you can use third-party skills to ensure those calls are only routed to agents trained on that product.

XBert Tips:

- If no agents with the required third-party skill are available, the dialer will not initiate the call. It will wait for a configurable period before attempting the call again.
- The system will not mark the lead as requiring a third-party skill if no agents are available. Instead, it sets a callback date for 24 hours later.

Configuring Party Skills

By configuring both first-party and third-party skills, you can ensure efficient and accurate call routing based on agent expertise, whether the calls originate from internal or external sources

Configure First-Party Skills

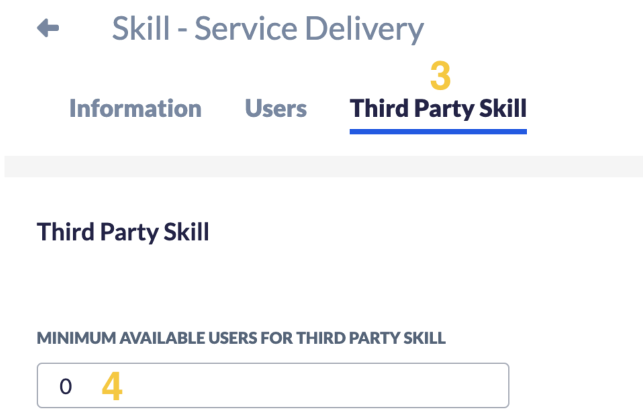
1. Select the Skill you would like to edit.
2. To edit, double-click the skill or select the edit (pencil) icon.
3. Navigate to the **First Party Skills** tab.
4. Under Field used for First Party Skill, select the field from your **Field Mapping** that corresponds to the skill in your lead data. This links the skill in your data to the skill you created.

XBert Tips:

- The values in the field and the name of the skill need to match (including the case).
- The skill must be created in the system before you can use it for first-party skill-based routing.

Configure Third-Party Skills

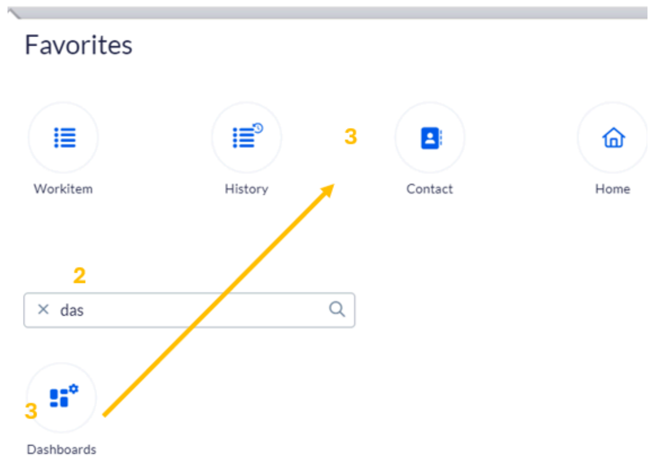
1. Select the **Skill** you would like to edit.
2. To edit, double-click the skill or select the **edit** (pencil) icon.
3. Navigate to the **First Party Skills** tab.



4. Specify the minimum number of agents required to have the third-party skill before the dialer starts making calls. This ensures you have enough skilled agents available to handle the incoming calls.

Managing Dashboards

Add Dashboard to Favorites

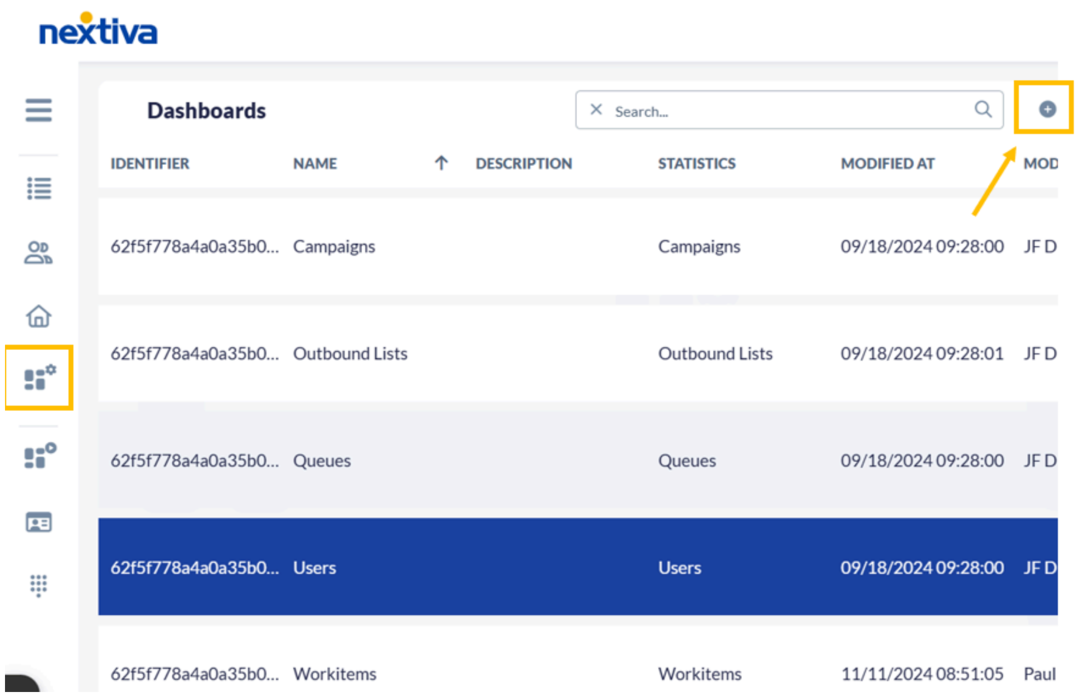
1. Select the **Options** icon (three lines) in the top left corner.
2. In the search bar, type “**dashboard**”
   a. 

3. Click and drag the icon up to **Add to Favorites**.

Customizing the Dashboard

Admins use this Dashboard option to manage what appears for other users' Dashboards.

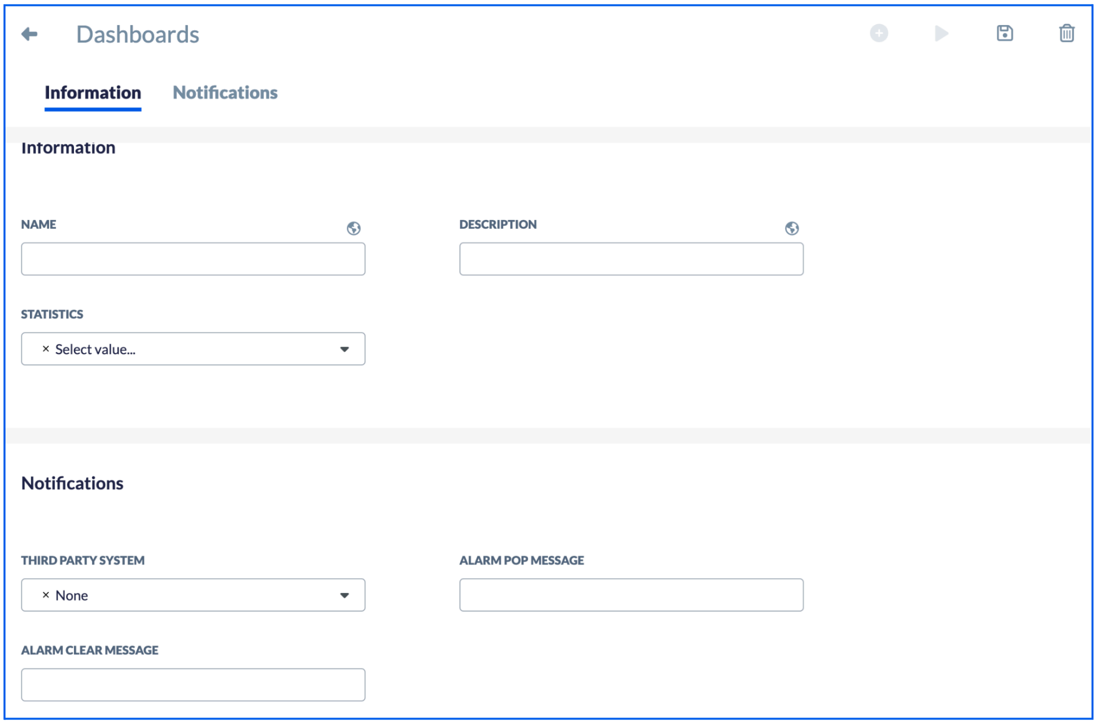
1. To add a new dashboard, select the **plus** (+) icon.



2. Give the new dashboard a name and description

XBert Tips: Leaving the Statistics field blank will ensure ALL statistics are available in that dashboard. Once a statistic is chosen from that dropdown, that will be the only metric that dashboard displays.

3. From Notifications, choose a third party tool to receive alerts from the Contact Center dashboard and write a prompt alarm that will display when there are new metrics to view.


Dashboards
Information
Notifications
Information
NAME
DESCRIPTION
STATISTICS
× Select value...
Notifications
THIRD PARTY SYSTEM
× None
ALARM POP MESSAGE
ALARM CLEAR MESSAGE

Admin Dashboard types

Queues

Allows you to monitor stats from the queue level.

Example: Max Queue Time, # of Available agents, Average Handle Time, etc.

Users

Allows you to monitor the individual user's stats.

Example: Current Status, Availability Percentage, # of Answered Workitems, etc.

Workitems

Allows you to monitor the stats of live workitems being handled by agents

Example: Handle Duration, Queue Time (time waited in queue), assigned Agent, etc.

Home Tab

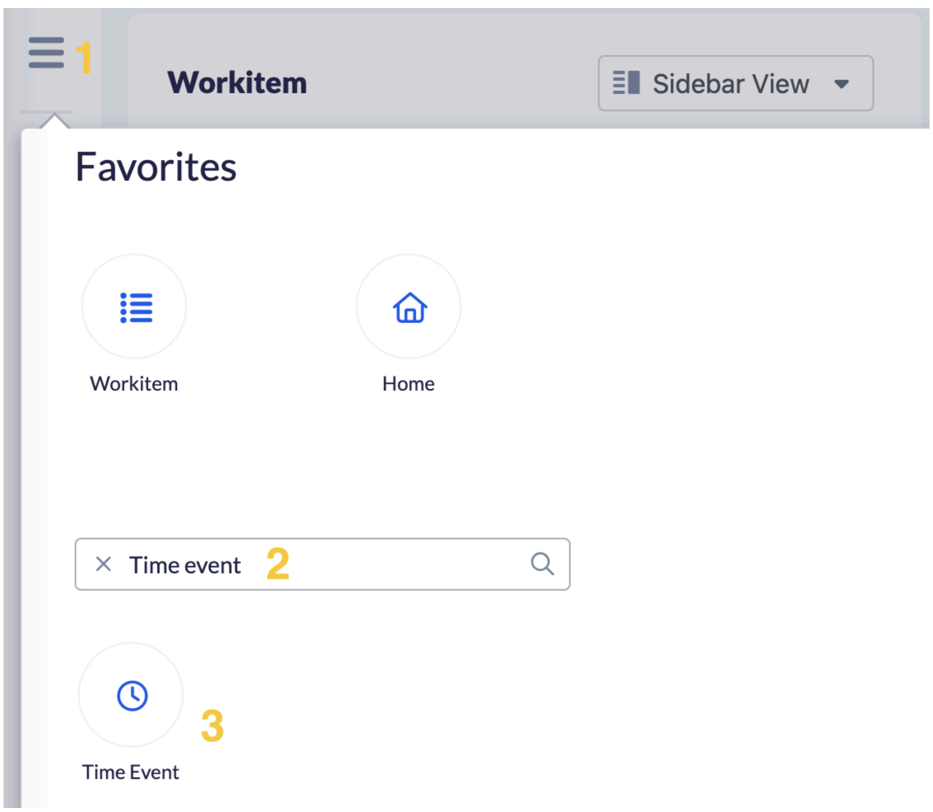
Where you manage/customize what shows other user's home pages.

Events

Time events allow you to schedule specific activities and define periods for different functionalities within your contact center.

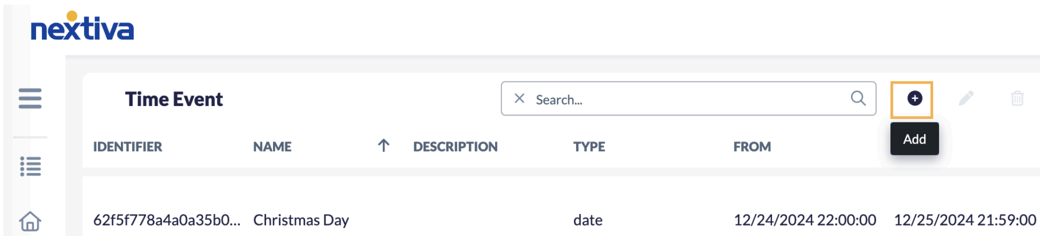
Access Time Events

1. Go to the **Options Menu**.
2. Search "**Time Event**".
3. Select the **Time Events** icon.

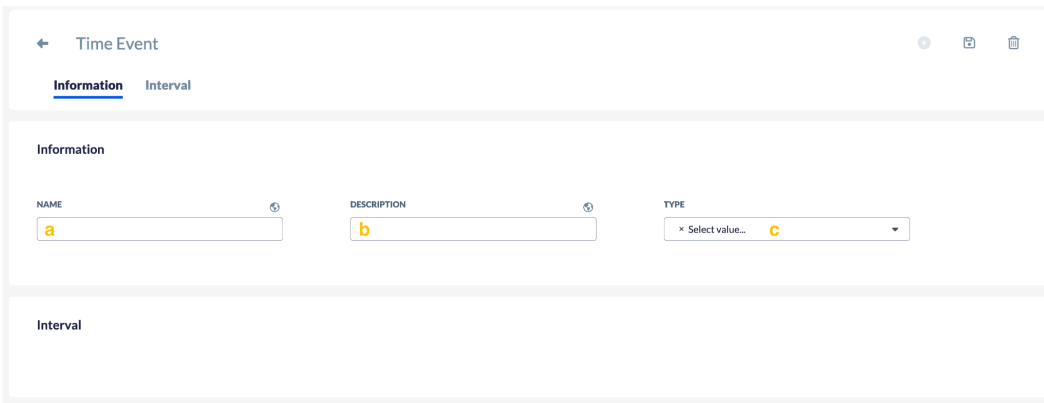


Create a New Time Event

1. Access Time Events.
2. Select the **Plus (+) button** located to the right of the Search field.



3. Configure **Time Event Details** (Information Tab)



   a. **Name:** Provide a descriptive name for the time event (e.g., "National Holiday - Thanksgiving," "Business Hours - Weekdays").

   b. **Description:** Add a detailed description to clarify the purpose of the time event.

   c. Select an [Event Type](#).

   d. Select the **Save** (floppy) icon to save the event.

Event Types

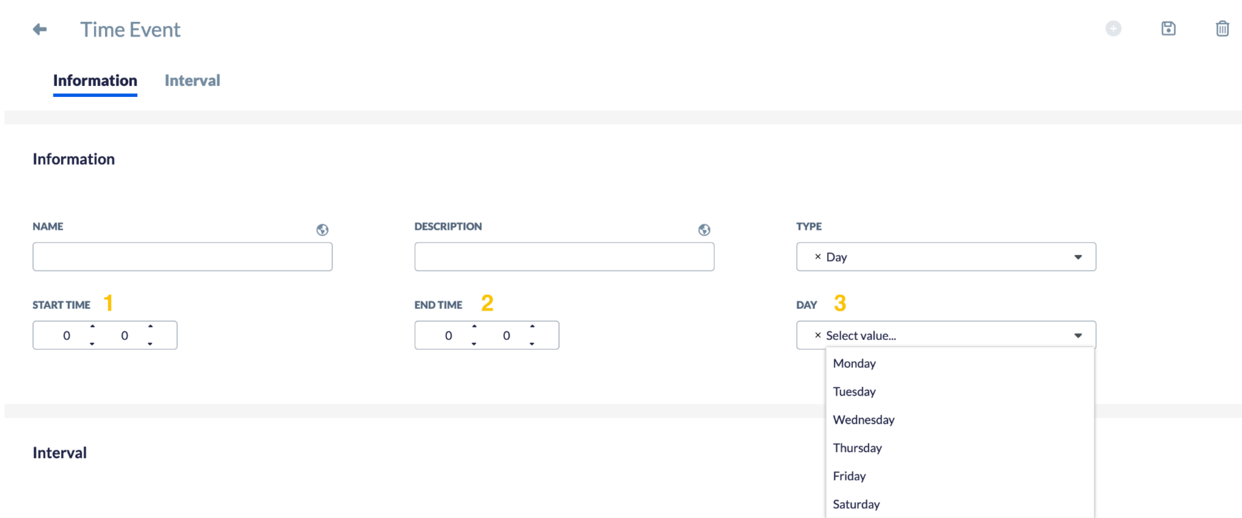
You can create Time Events to effectively manage holidays, business hours, recurring tasks, and other time-based activities within your Nextiva Contact Center by selecting the appropriate type of time event.

XBert Tip: If you select "Job" or “Monthly Recurrence” as the type, use the **Interval** Tab to define the specific time intervals for the scheduled task. This will be in increments of 15 and 30 minutes, or by hours 1 - 4. Interval will not populate if “Job” or “Monthly Recurrence” isn’t selected.

Day

Define the start and end time for a specific day of the week.

XBert Tip: Use the Weekdays event type to select more than one day of the week.

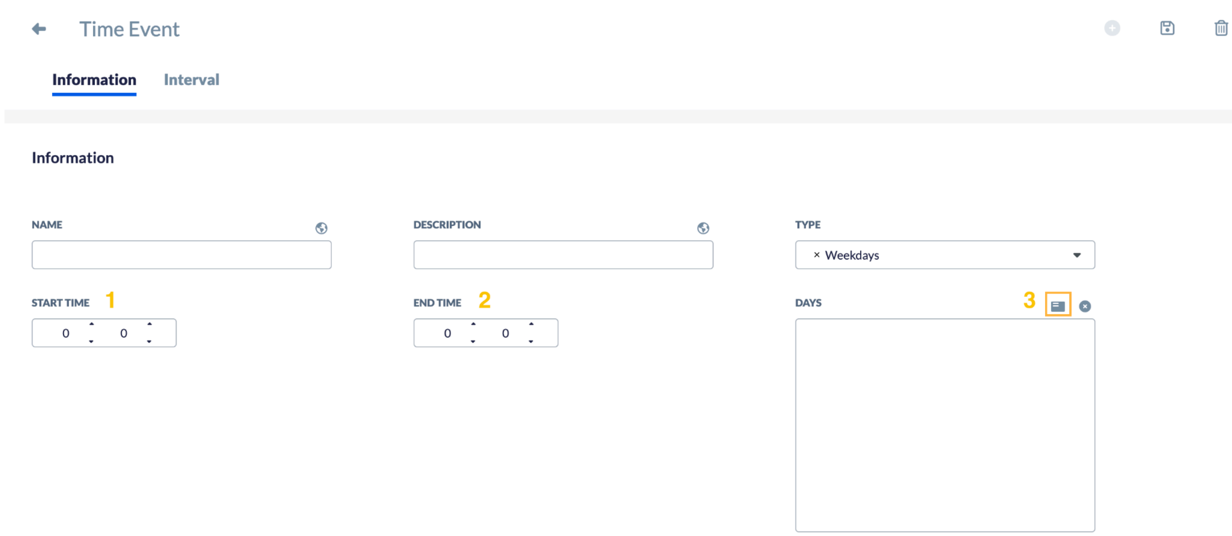


1. Enter the preferred **Start Time**.
2. Enter the preferred **End Time**.
3. Use the dropdown menu to select the **Day** of the week.
4. Select the **Save** (floppy) icon to save the event.

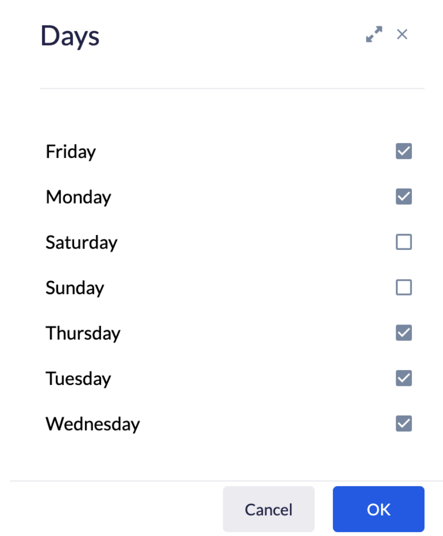
Weekdays

Define the start and end time for specific days of the week.

XBert Tip: Use Weekdays to define your business operating hours to control call flows and agent availability.



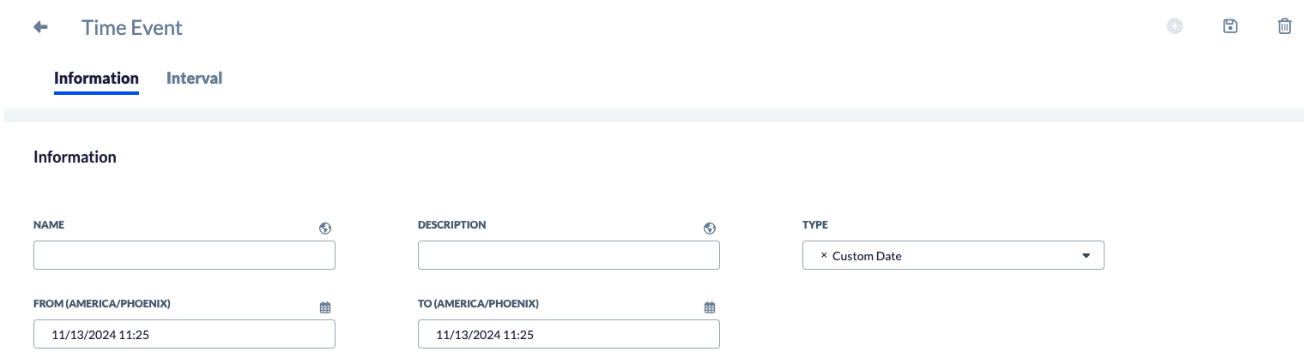
1. Enter the preferred **Start Time**.
2. Enter the preferred **End Time**.
3. Use the dropdown menu to select the day of the week.
4. Select **OK**.
5. Select the **Save** (floppy) icon to save the event.



Custom Date

Custom Date field will allow you to populate a period of time for the specific event to occur.

XBert Tip: Create time events using Custom Date to define national holidays and automatically trigger out-of-office prompts or adjust call routing during those periods.



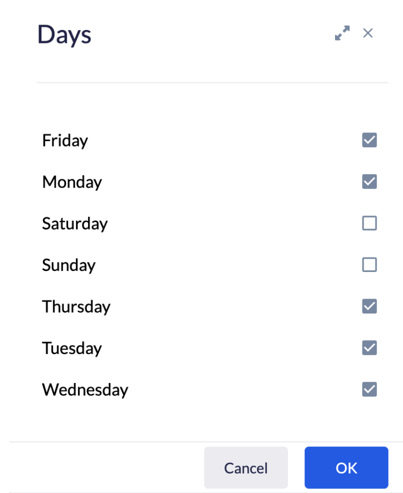
1. Enter the preferred Start Date and Time in the **From** field.
2. Enter the preferred End Date and Time in the **To** field.
3. Select the **Save** (floppy) icon to save the event.

Job Intervals

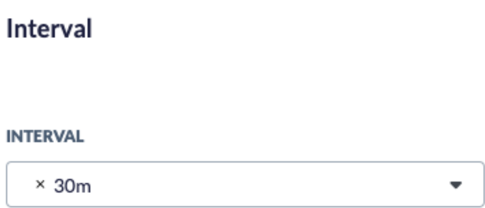
Set intervals on specific days for scheduled tasks like reports or data extraction (ETL).

XBert Tip: Schedule automated reports or data extraction processes at specific intervals each week at a specific time using the "Job" type.

1. Enter the preferred **Start Time**.
2. Enter the preferred **End Time**.
3. Use the dropdown menu to select the day of the week.
4. Select **OK**.



5. Select the time interval this job should occur.

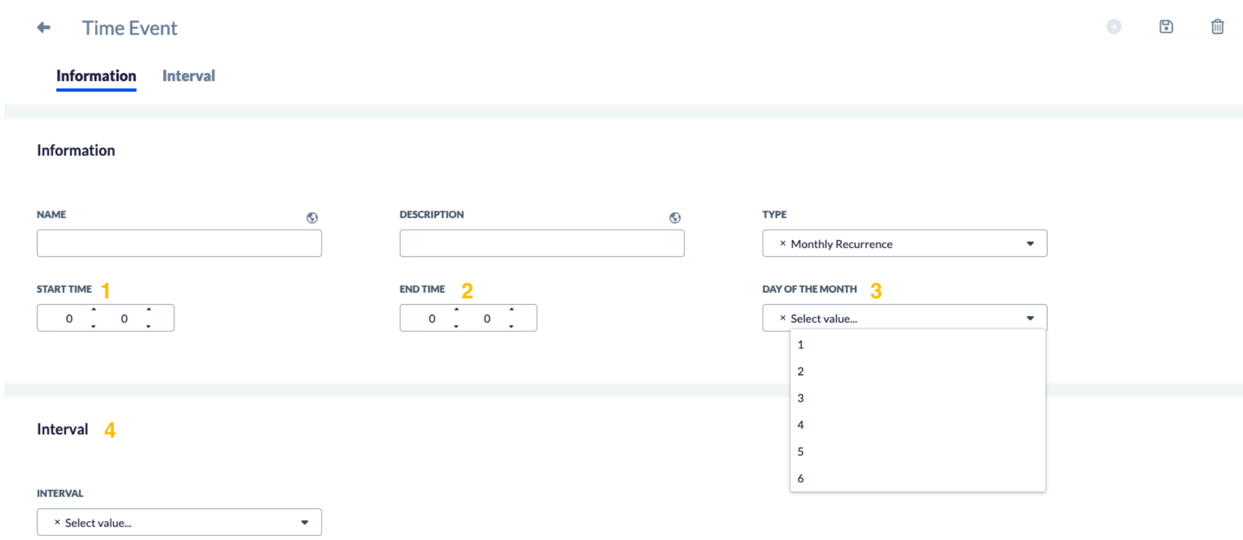


6. Select the **Save** (floppy) icon to save the event.

Monthly Recurrence

Set recurring events that happen on a monthly basis, such as billing cycles or monthly performance reviews.

XBert Tip: Schedule a monthly reminder on a specific day of every month for specific reports or data extraction processes.



1. Enter the preferred **Start Time**.
2. Enter the preferred **End Time**.
3. Use the dropdown menu to select the **day of the month**.
4. Select the time **interval** this job should occur.
5. Select the **Save** (floppy) icon to save the event.

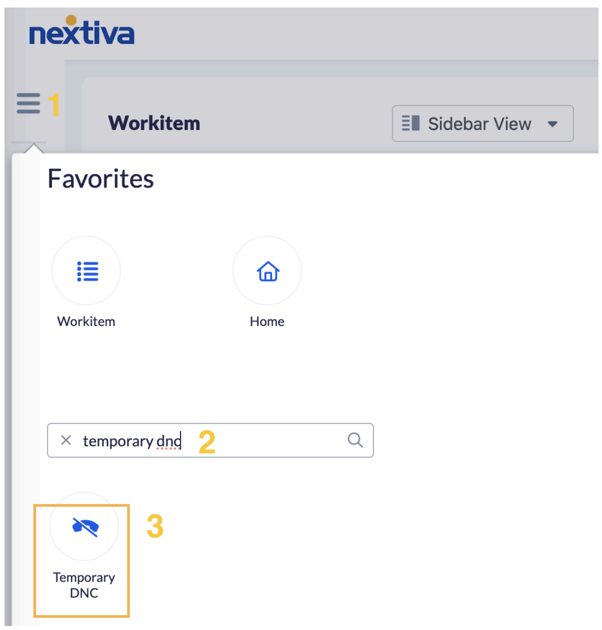
Temporary DNC

Creating a Temporary DNC list in Nextiva allows you to block or restrict outbound calls to specific numbers for a defined period. Utilize the Temporary DNC feature in Nextiva to manage your outbound c›alling compliance.

XBert Tip: DNC stands for “Do Not Call”.

Access the Temporary DNC Section

1. Log in to your Nextiva account.

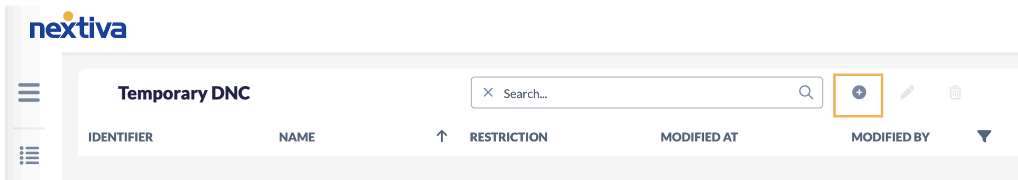


2. Navigate to the options menu.

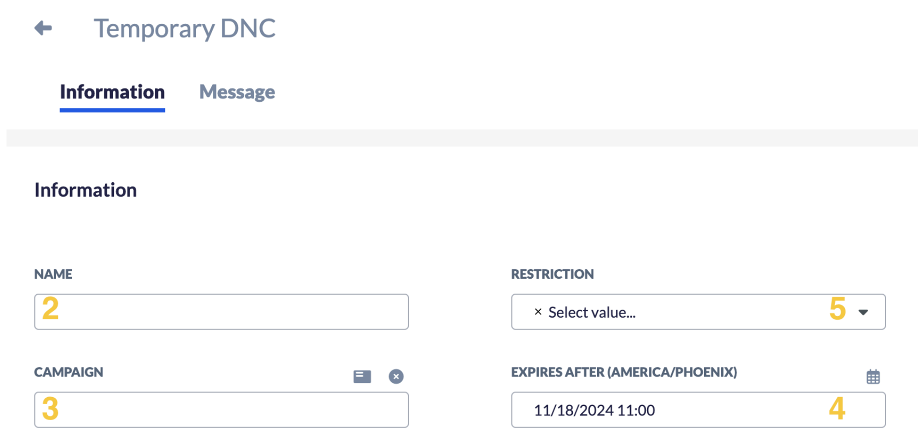
3. Search for "Temporary DNC".

Create a New Temporary DNC Entry

1. Select the Plus (+) button. A new window will appear where you need to fill in the required information.



2. Enter the name of the DNC.

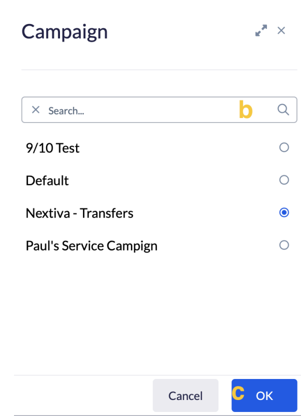


3. Select a campaign you want to add to the Temporary DNC list.

   a. Select the **campaign file** icon. This will populate a new window with the list of campaigns available.

   b. Select or search for the campaign you would like to utilize.

   c. Select **OK**.



4. Select the time the Temporary DNC should expire by selecting the calendar icon.

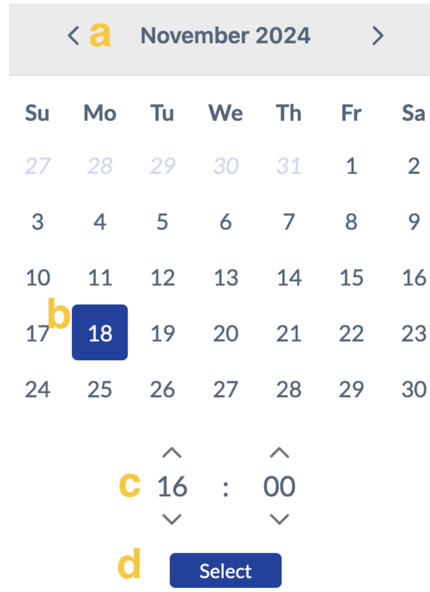
    a. Use the left and right toggles to select the month.

    b. Select the day of the month.

    c. Use the up and down arrows to select the time.

    XBert Tip: The time is in universal 24-hour format.

    d. Select **Select** to Save the date and time you entered.



5. Select a restriction. See Restriction Types (below) for more information.

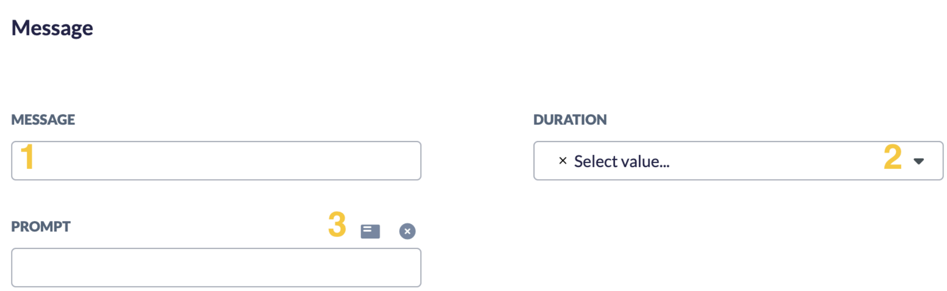
Restriction Types

Choose the type of restriction you want to apply to the number:

- **Block All:** Blocks all outbound calls (manual and predictive) and displays a warning message/plays a warning prompt.
- **Block Manual Calls:** Blocks only manual outbound calls from the Dial Pad and Contact and displays a warning message.
- **Block Predictive and Warning for Manual Calls:** Blocks all predictive calls and displays a warning message. Manual calls are allowed but also display the warning message.
- **Block Predictive Dialer:** Blocks all predictive calls and displays a warning message.
- **None:** No restriction is applied after the expiry date. All calls will go out.
- **Warning:** Allows calls to go out but displays a warning message/plays a warning prompt.
- **Campaign:** Select the specific campaign you want this consent to apply to. If you leave this field blank, it will apply to all campaigns.
- **Expires After:** Set the date and time when the DNC entry should expire.

Configure the Message Tab

1. Enter the warning message you want displayed to the agent when they attempt to call a number on the Temporary DNC list.

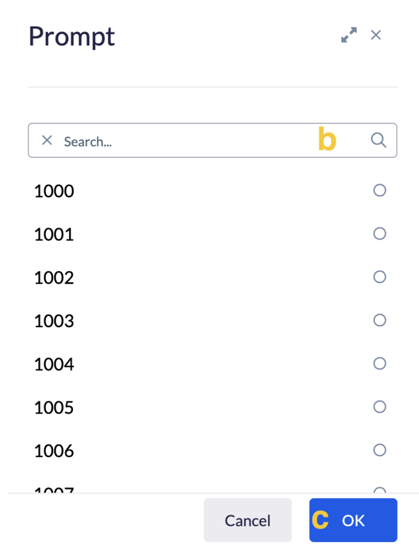


2. Select how long the warning message should be visible to the agent from the drop-down menu.

3. Select an audio prompt to be played to the agent instead of a visual message.

    a. Select the **audio prompt file** icon.

    b. Search for or select the prompt you would like to apply. These can be created in the [Prompt]() section.



c. Select **OK**.

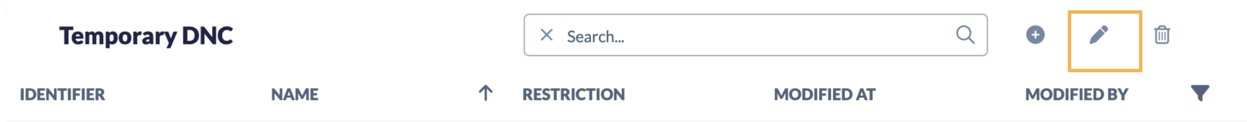
4. Once you have filled in all the necessary information, click the Save (floppy-disk) icon to create the Temporary DNC entry.

XBert Tips:

- You can upload Temporary DNC entries in bulk using the Load Objects (CSV) feature.
- The maximum number of records a Temporary DNC object can hold is 300,000.

Edit a Temporary DNC

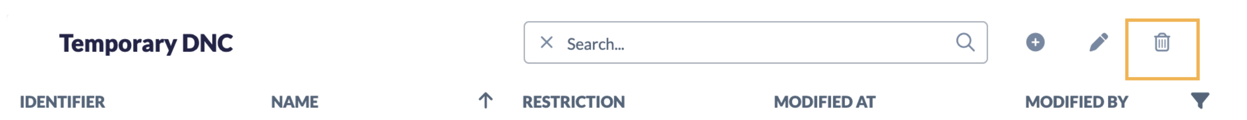
1. From the Temporary DNC list, select the name of the Temporary DNC you would like to edit.
2. Select the edit (pencil) icon.



3. Make the necessary changes to the Temporary DNC.
4. Select the Save (floppy-disk) icon to create the Temporary DNC entry.

Delete a Temporary DNC

5. From the Temporary DNC list, select the name of the Temporary DNC you would like to delete.
6. Select the delete (trash can) icon.

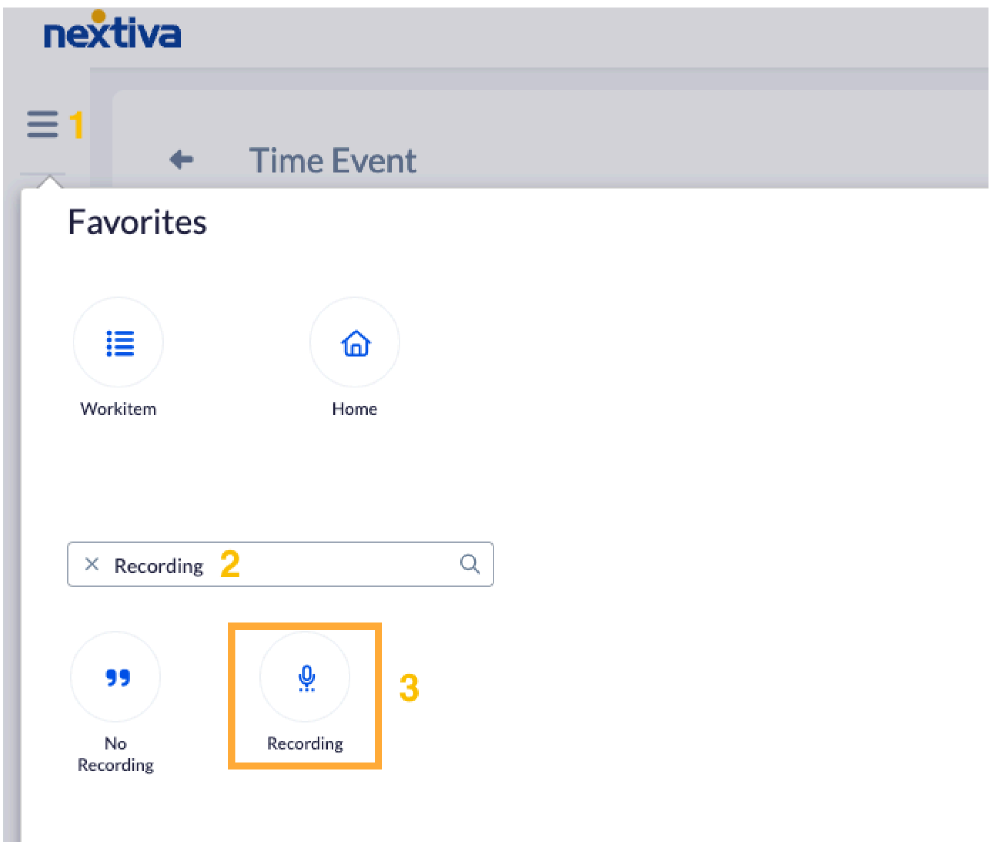


Recordings

Nextiva's Recordings feature provides valuable tools for managing and analyzing customer interactions.

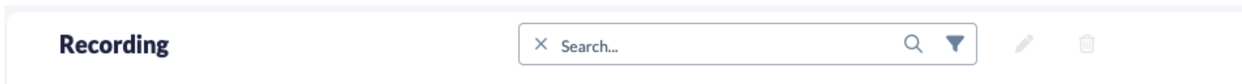
Access the Recordings Section

1. Go to the Options Menu.
2. Search for "Recording."
3. Select the **Recordings** icon to open the Recordings section.



Search Recordings

Use the search functionality to find the specific recording you want to access. You can search by various criteria, such as date, time, agent, or customer phone number.



Explore the Recording Information

- **Information Tab:** This tab provides key details about the recording:
- **From:** The originating phone number or address.
- **To:** The destination phone number or address.
- **User Identifier:** The ID of the agent who handled the call.
- **Call Identifier:** The unique ID associated with the call.
- **Duration:** The length of the recording.
- **Filename:** The name of the recording file.

Play the Recording

Click the ellipsis (...) button to play the recording directly within the platform or download it to your device.

XBert Tip: If there are multiple recordings associated with the call (e.g., due to pausing and resuming recording), they will be combined into a single file for playback.

Analyze the Transcription and Tone: This allows AI to analyze the tone of the conversation to gauge the sentiment.

Transcription and Tone Tab: This tab displays the transcribed conversation with tone analysis:

- **Tone Indicators:** Each line of the conversation is accompanied by an emoji indicating the speaker's tone (green happy face, orange neutral face, or red unhappy face).
- **Timing Information:** The transcription shows the time elapsed in the conversation when each speaker starts talking and the duration of their speech segment.
- **Refresh Transcription:** Use the curly arrow button to refresh the transcription if needed.

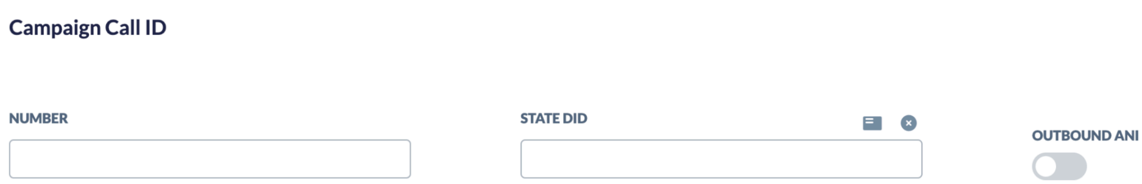
Review the Scorecard:

- **Scorecard Tab:** If scorecards are associated with the campaign, this tab displays them along with the likelihood that specific classifications within the scorecard were covered during the call. A green checkmark or red alert icon provides a visual representation of the scorecard results.

By following these steps, you can effectively utilize Nextiva's Recordings feature to gain valuable insights into customer interactions, assess agent performance, and identify areas for improvement.

Campaign Call ID

The Campaign Call ID settings allow you to manage the caller ID that is displayed to customers when you make outbound calls. This is particularly useful for ensuring that your calls appear to be coming from a local or recognizable number, which can improve answer rates and customer trust.



XBert Tip: Spoofing is critical to ensure compliance of your calls. Make sure you own the number or are spoofed according to regulations. Please consult your Nextiva Project Manager for more information.

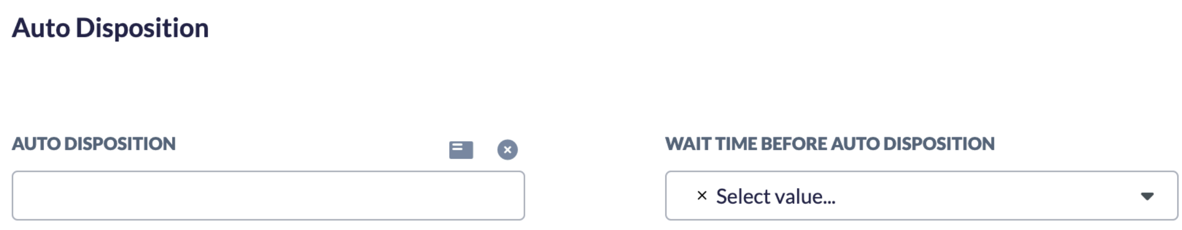
1. Enter the desired **phone number** that you want displayed as the caller ID. This could be your main business number, a toll-free number, or a specific department number.

2. If you want the caller ID to appear as a local number to the recipient, you can enter a **State DID** (Direct Inward Dialing) number. This is a virtual number that has a local area code, making it more likely that the recipient will answer the call.

3. **Toggle Outbound ANI ON** if you want to use the Outbound ANI (Automatic Number Identification) integration. This allows outbound ANI requests to use numbers from the customer's phone system, which can be useful for integrating with third-party CRM or contact management systems.

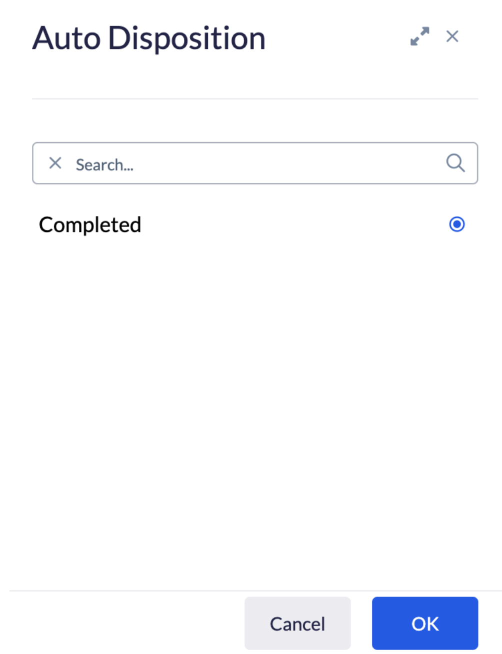
Auto Disposition

This feature allows you to configure automatic dispositions for calls within a specific campaign, rather than relying on agents to manually select a disposition after each call.



1. Select the specific disposition that will be automatically applied to calls within the campaign by selecting the Auto Disposition **file icon**.
2. Select the preferred disposition.
3. Select OK.

   XBert Tip: [Create a disposition](#).

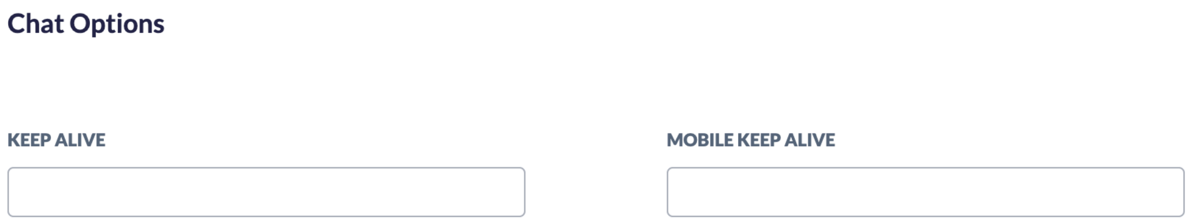


4. Select the **Wait Time Before Auto Disposition** to determine how long Nextiva should wait after a call ends before automatically applying the selected disposition.

   XBert Tip: This delay can be useful to allow for situations where an agent might need a short amount of time to wrap up the call or perform after-call work before the disposition is finalized.

Chat Options

Set chat-specific options (e.g., keep alive timers) allow you to fine-tune how chat interactions are handled within the campaign. The value is in seconds.



Here's what each option means:

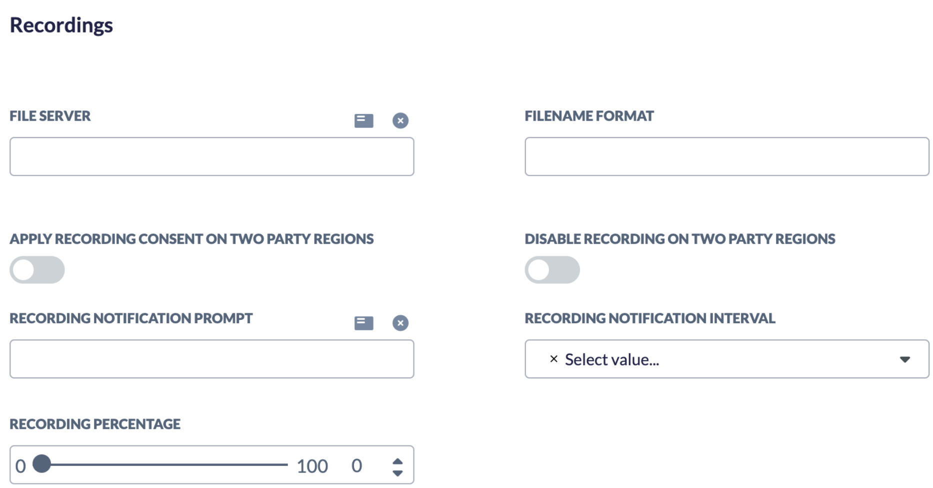
- **Keep Alive:** This setting determines how long a chat work item should remain open after a customer closes the chat window on their end. This "keep alive" time allows agents a grace period to complete any wrap-up tasks, add notes to the interaction, or send a follow-up message before the chat is officially closed in the system.

- **Mobile Keep Alive:** This setting is similar to "Keep Alive" but specifically applies to customers who are using mobile devices to access the chat. You might set a different keep alive time for mobile users to account for potential connectivity issues or different user behavior on mobile devices.

XBert tip: We recommend you set both values to 600; if you don't receive a keep alive from the customer, terminate the chat after 10 minutes.

Recordings

The Recordings tab within Nextiva's campaign settings allows you to control how call recordings are handled within a specific campaign.



File Server

1. Select the File Server **file icon**.

2. Select the file server.
3. Select **OK**.

XBert Tip: Choose a specific location for storing recordings associated with this campaign, which can be useful for organization and management.

Filename Format

Specify the format for the filenames of your call recordings.

Apply Recording Consent on Two Party Regions Toggle

Toggle this option ON if you want the system to apply recording consent rules for calls made to regions that require two-party consent for recording. When enabled, this will typically play a message at the beginning of the call informing both parties that the call is being recorded and obtaining their consent.

Disable Recording on Two Party Regions Toggle

Toggle this option ON if you want to completely disable call recording for calls made to two-party consent regions. This ensures compliance with recording laws in those regions.

Recording Notification Prompt

Select a pre-recorded audio prompt that will be played to notify participants that the call is being recorded. This prompt is typically played at the beginning of the call or when recording is started.

1. Select the Recording Notification Prompt **file icon**.

2. Select the prompt of your choice.
3. Select **OK**.

Recording Notification Interval

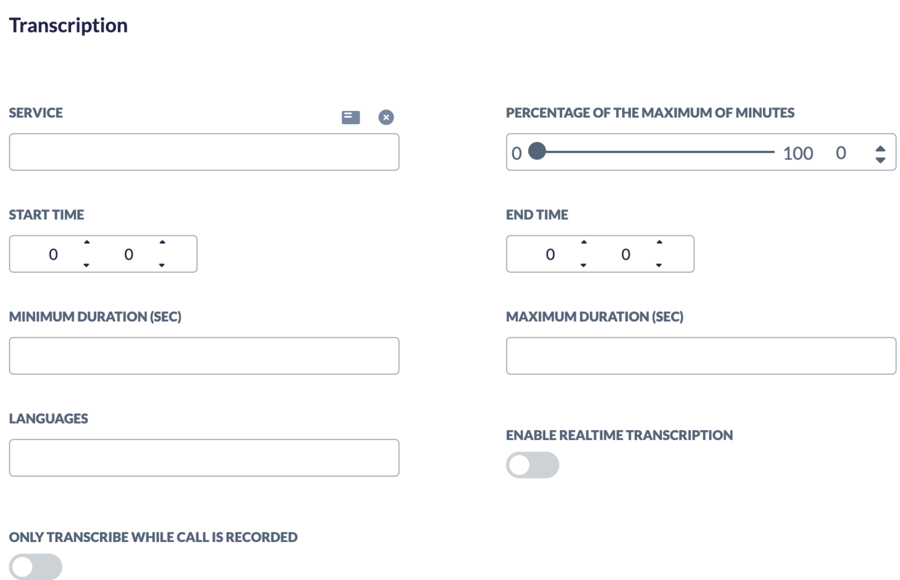
Use the dropdown menu to select how often the recording notification prompt should be played during the call.

Recording Percentage

Use the slider to set the percentage of calls within this campaign that you want to be recorded. This allows you to record all calls (100%), no calls (0%), or a specific percentage of calls. This can be useful for quality monitoring, training, or compliance purposes.

Transcription Tab

The Transcription tab within Nextiva's campaign settings allows you to control how call recordings are transcribed within a specific campaign. Transcriptions can be incredibly useful for analyzing customer interactions, identifying keywords, and gaining deeper insights into conversations.



Service

Select the transcription service provider you want to use.

1. Select the Service **file icon**.
2. Select the transcription service of your choice.
3. Select **OK**.

XBert Tip: Nextiva offers different options with varying features, accuracy levels, and pricing.

Percentage of the Maximum of Minutes

Use the slider to set the percentage of your total available transcription minutes that you want to allocate to this campaign.

Start Time / End Time

Set the specific time window during the day when recordings should be transcribed.

Minimum Duration (sec) / Maximum Duration (sec)

Set limits on the duration of recordings that will be transcribed.

Languages

Specify the language(s) spoken in the recordings that you want to be transcribed.

Enable Realtime Transcription Toggle

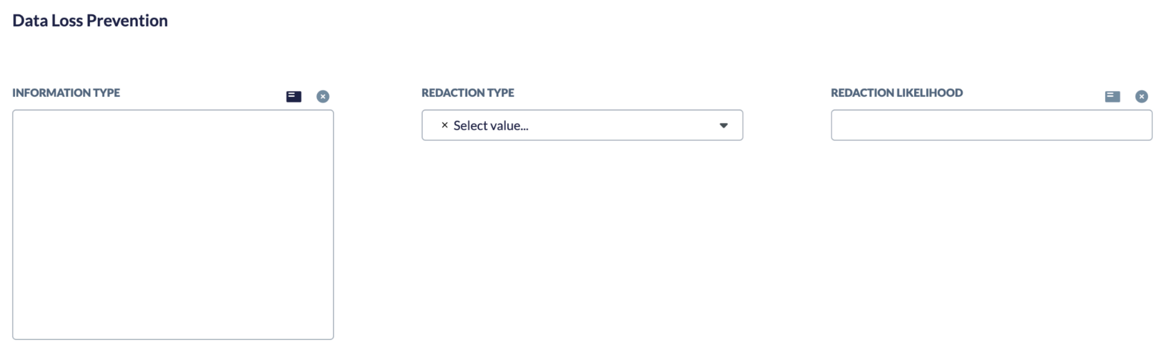
Toggle this option ON to enable real-time transcription for calls within this campaign.

Only Transcribe While Call is Recorded Toggle

Toggle this option ON to only transcribe the portions of a call that are actively being recorded.

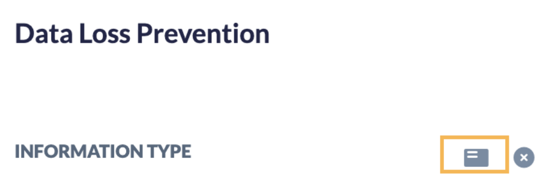
Data Loss Prevention Tab

Data loss prevention (DLP) features help protect sensitive information during customer interactions. Nextiva's DLP settings allow you to redact sensitive data from call recordings and transcriptions.

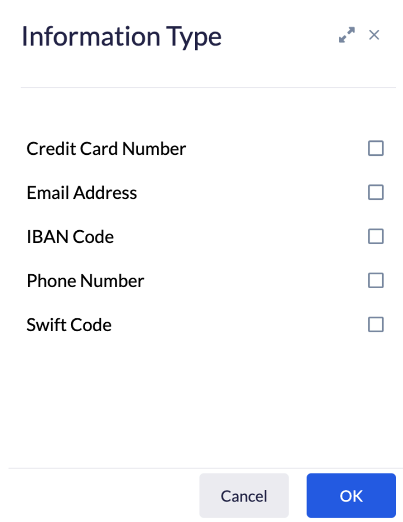


Information Type

1. Select the **Information Type file** icon.

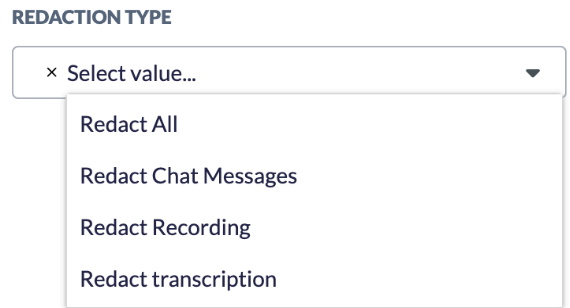


2. Select the type of sensitive information you want to redact.
3. Select **OK**.



Redaction Type

From the dropdown menu, choose where you want the redaction to occur:

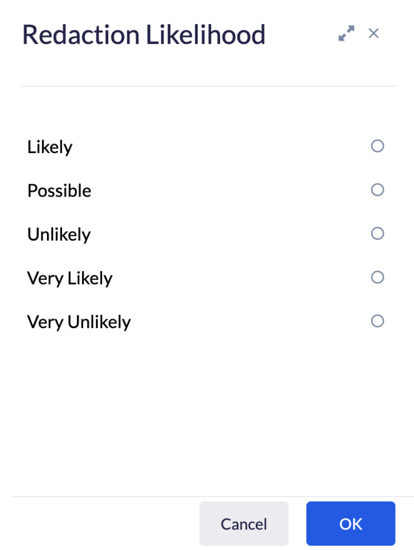


a. **Redact All:** Redacts the information from both transcriptions and recordings.
b. **Redact Chat Messages:** Redacts the information only from the chat messages.
c. **Redact Recording:** Redacts the information only from the audio recording.
d. **Redact Transcription:** Redacts the information only from the text transcription.

Reaction Likelihood

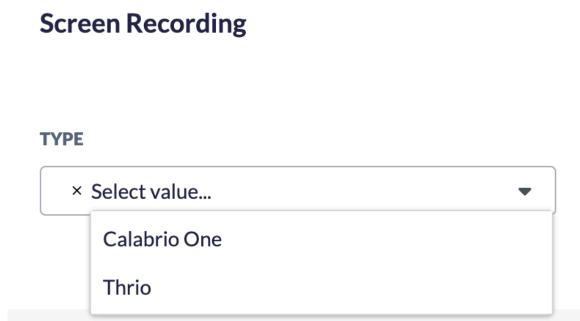
1. Select the **Redaction Likelihood file** icon.
2. Select the level of sensitivity for redaction:
   a. Very Unlikely
   b. Unlikely
   c. Possible
   d. Likely
   e. Very Likely

   XBert Tip: Unsure? It's generally recommended to start with "Very Unlikely" and increase the sensitivity as needed.
3. Select **OK**.



Screen Recording Tab

From the dropdown, choose the screen recording option you prefer to use.



Surveys

Nextiva offers three distinct survey types within its campaign settings, each serving a unique purpose in gathering feedback and measuring different aspects of the customer experience.

Survey Types

User Survey

Target Audience: Internal users, typically agents or employees within your organization.

Purpose: [Create a User Survey] to gather feedback on internal processes, tools, or systems. This could include:

- Agent satisfaction with the contact center platform.
- Feedback on new features or workflows.
- Evaluation of training programs.

Deployment: These surveys are often triggered after specific events within the agent's workflow, such as after completing a call or closing a ticket.

Quality Monitoring Survey

Target Audience: Supervisors or quality assurance specialists.

Purpose: Evaluate the quality of customer interactions and provide feedback to agents. This could include:

- Assessing agent adherence to scripts and procedures.
- Evaluating communication skills and customer service quality.
- Identifying areas for agent coaching and improvement.

Deployment: These surveys are typically triggered after a call or interaction is monitored for quality assurance purposes.

Customer Survey

Target Audience: External customers or clients.

Purpose: Gather feedback on the overall customer experience. This could include:

- Measuring customer satisfaction with products or services.
- Collecting feedback on specific interactions with agents or the company.
- Identifying areas for improvement in customer service or processes.

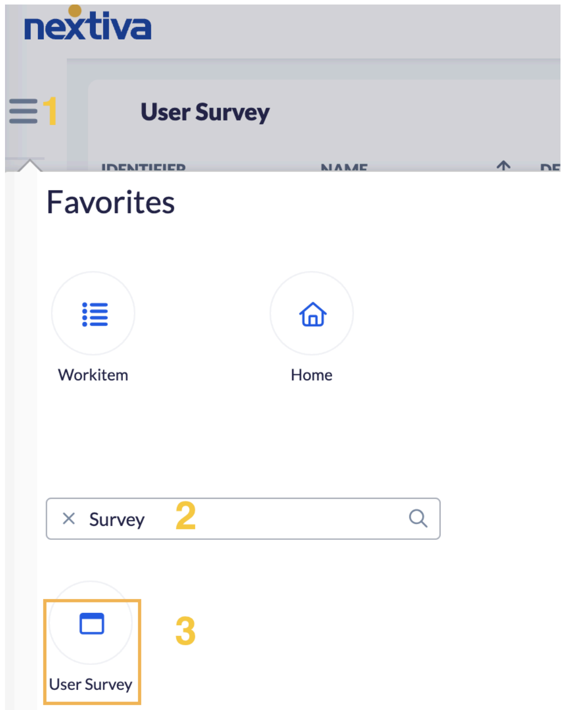
Deployment: These surveys can be deployed through various channels, such as email, SMS, or web links, and are often triggered after a customer interaction or transaction.

By utilizing these different survey types, you can gather comprehensive feedback from various perspectives, identify areas for improvement, and enhance the overall customer experience.

User Survey

Access User Survey

1. Go to the **Options** Menu.

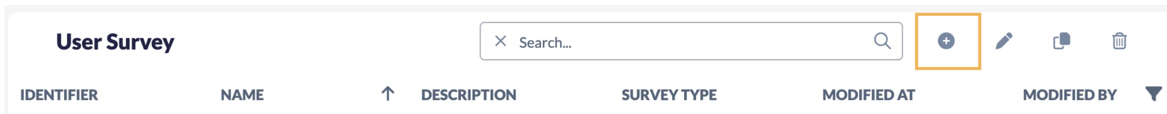


2. Search for "Survey" or “User Survey”.

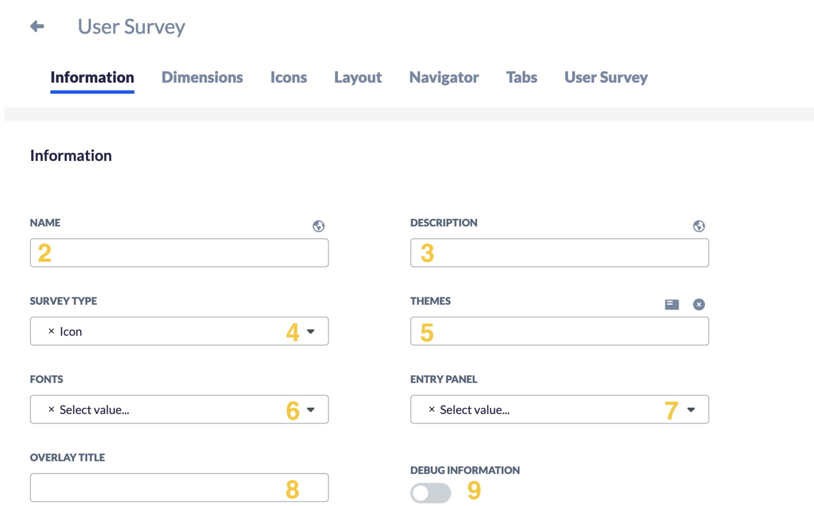
3. Select the **User Survey** icon to open the Prompts section.

Create a User Survey

1. Select the **Plus** (+) button located to the right of the Search field. This will open the Prompt creation form.

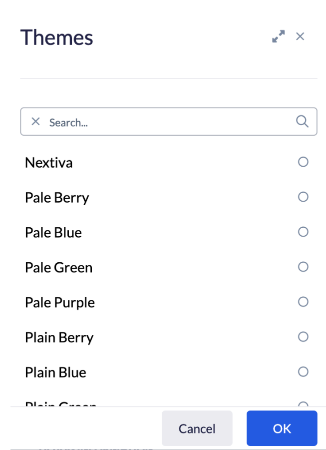


2. Enter in a concise and descriptive **name** for your survey. This will help you identify it later.



3. Provide a more **detailed explanation** of the survey's purpose or content.
4. Select the appropriate **type** of survey from the available options:
   a. Full Page
   b. Icon
   c. iFrame
5. Select a color Theme.
   a. Select the **Themes** file icon.

   b. Select the color from the list of themes.
   c. Select **OK.**



6. If you want to customize the **font** used in your survey, select the preferred font from the fonts dropdown menu.

7. Select the desired **entry panel style** for your survey from the dropdown menu.

8. Type a title into the **Overlay Title field** to have a title appear as an overlay on your survey.

9. If you are testing the survey and need to see debug information, toggle **Debug Information** to the "On" position.

   XBert Tip: Debug Information allows you to see what condition occurs when something goes wrong in the survey. The Debug Information is sent to the JavaScript Console.

Proceed to Other Tabs

- Once you have completed the "Information" tab, move on to the other tabs ("Dimensions," "Icons," "Layout," "Navigator," "Tabs," and "User Survey") to further customize your survey's appearance, navigation, and content.

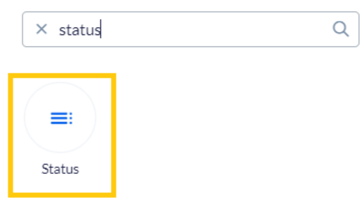
Save a Survey

- Look for a "Save" or "Submit" button (not visible in the image) to save your survey settings.

Status

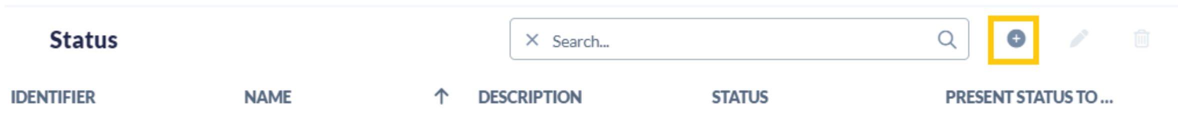
In the status section you can add or remove statuses for the contact center agents to use during their workday. This can be useful if you are trying to make alternate busy statuses to be more specific to what the agent is doing at the time.

1. Go to the **Options** Menu.
2. Search for "Status."
3. Select the **Status** icon to open the Status section.



Adding a Status

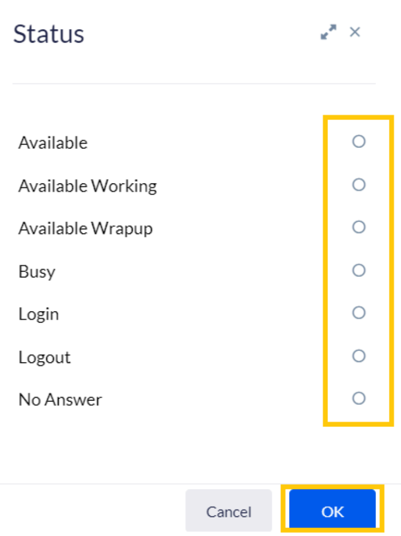
1. To add a status, click on the plus+ icon at the top of the status page, next to the search bar.



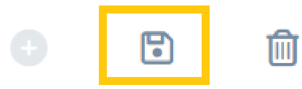
2. In the **Name** field, you can name the status. This will be the status name that the agents will see.

3. In the **Description** field, you can put a longer description to the purpose of the status. This would be for your benefit in case you or another admin look to change the status later. So for example, if I was to make a “break” status, I would put “Break” in for the name and “Alternative Busy Status” for the description.

4. In the **Status** field, click on the blank section and a window will open for you to select the [base of the status](). The new status you create still needs to have a foundation in a set, existing status.



5. Select the **Save** (floppy-disk) icon in the upper right hand corner to save.



Foundation Statuses

AVAILABLE - Agents will be presented workitems

AVAILABLE WORKING - Agents can select this status only when they are actively working on a workitem

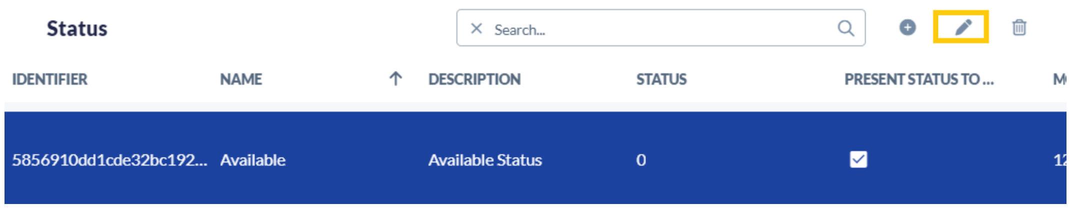
AVAILABLE WRAPUP - This would look to take the place of the existing wrapup function. In the campaigns section you can have the agent’s status automatically set to this status following the completion of a workitem.

BUSY - Agents can select a specifically created status such as “Break” or “After Call Work” that can be manually selected by the agent. The agent will not be presented workitems while in this status.

NO ANSWER - This would look to take the place of the existing no answer function. In the campaigns section you can have the agent’s status automatically set to this status following a missed workitem.

Editing an Existing Status

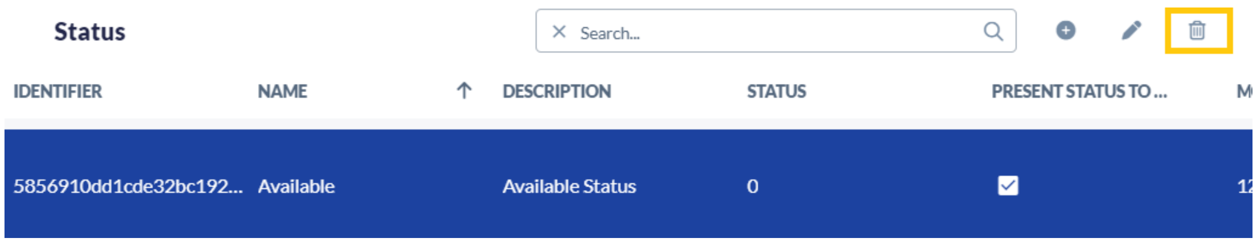
1. To edit an existing status, click on the line for the status to highlight it.
2. Click on the pencil icon at the top. This will take you to the edit page for the status.
3. Save your changes by clicking on the diskette icon.



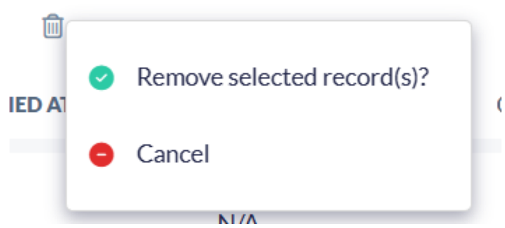
Removing a Status

1. To remove an existing status, click on the line for the status to highlight it.

2. Select the **delete** (trash) icon at the top. This will take you to the edit page for the status.

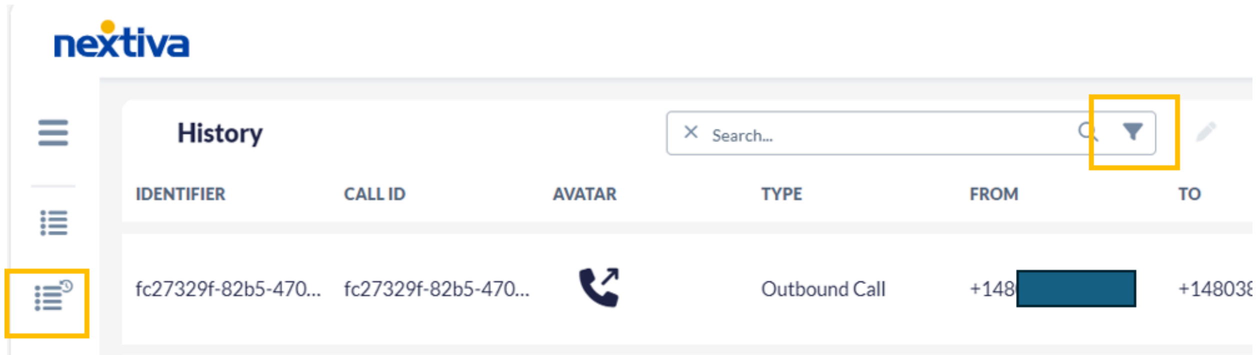


3. Select **Remove selected record(s)?** to delete the status.



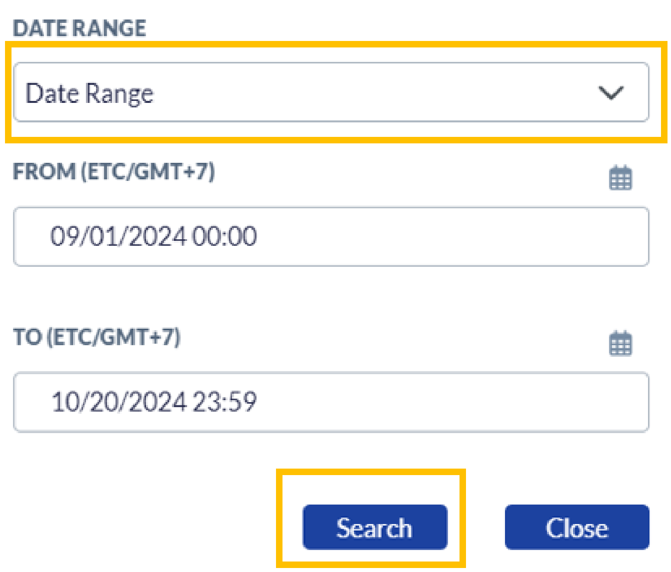
History

The History option allows you to search previous workitems handled by agents using different parameters. To start searching History, choose the History tab from the Options menu on the left.



Changing Date Range in the History Search

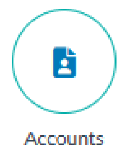
1. Select the **Filter** icon from the top.
2. Scroll down to the **Date Range** and choose the desired time frame.
3. Click **Search**.



Contacts

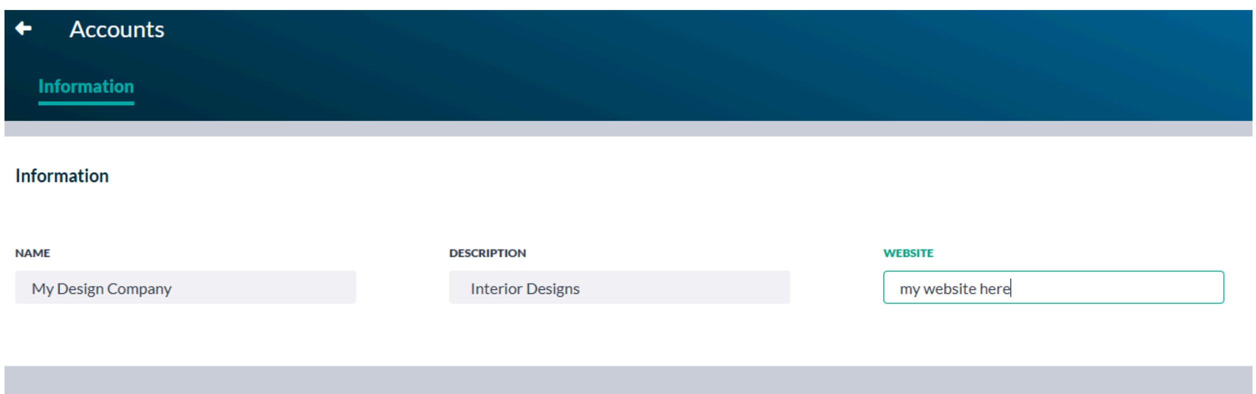
Creating Accounts

1. Create accounts by selecting the Accounts icon in the Options Menu.



2. Select the add **+** button and you will be directed to a new configuration page which will then have the name, description and website for the new account.

3. Save the Account by selecting the **Save** icon.

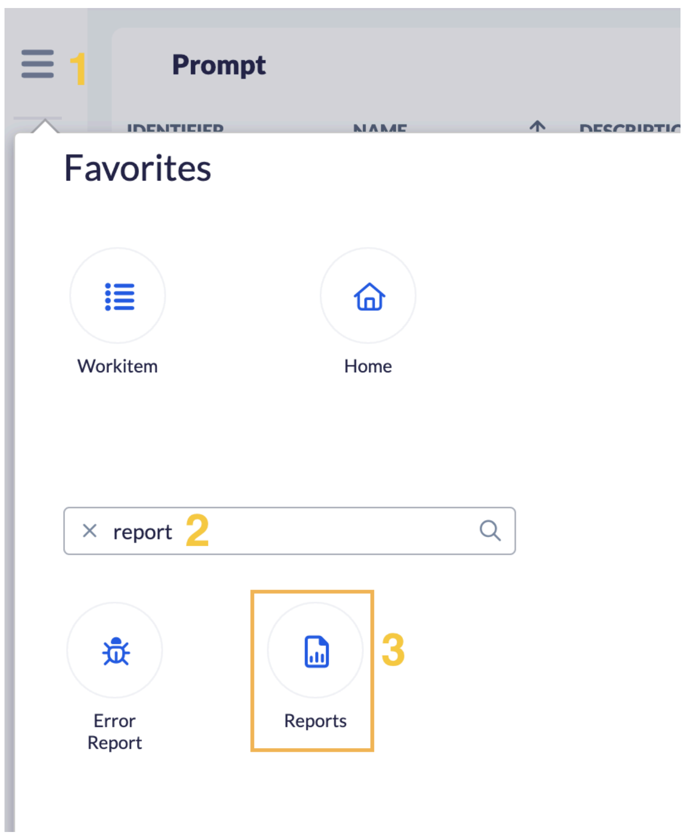


Reports

Generate customized reports to track key metrics, identify trends, and make informed decisions to improve your contact center operations.

Access the Reports Section

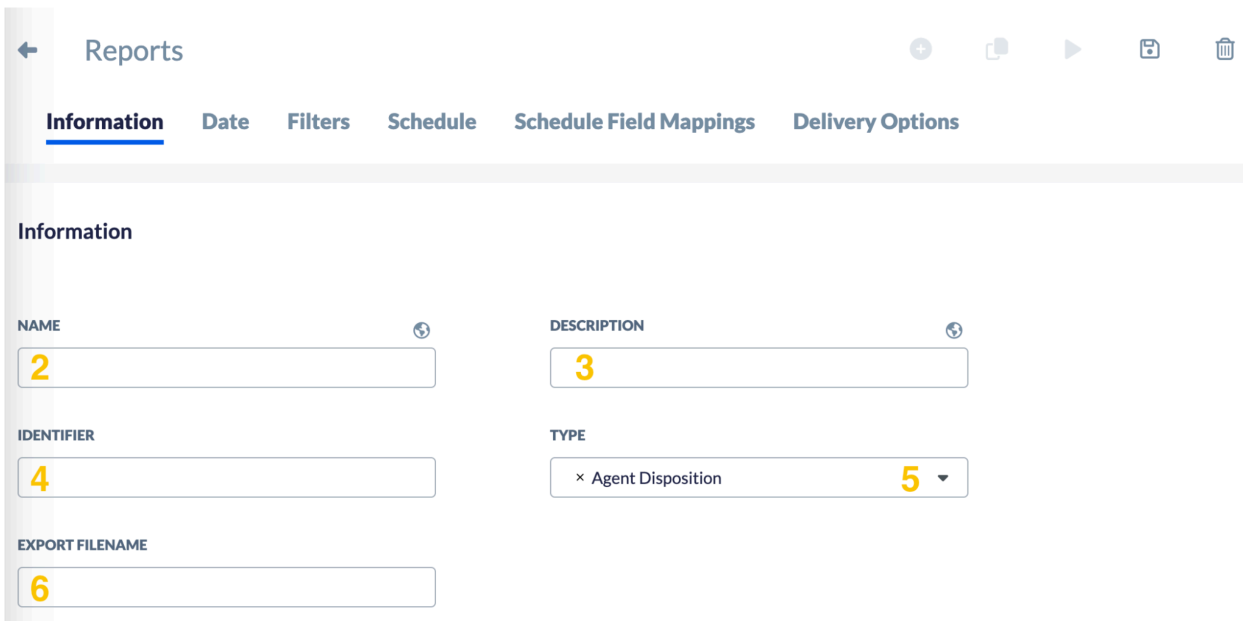
1. Go to the **Options** Menu.
2. Search for "Reports."
3. Select the **Report** icon to open the Prompts section.



Create a Report

1. Select the Plus (+) button located to the right of the Search field. This will open the Reports creation form.

2. Enter a **name** for your report (e.g., "Daily Agent Performance," "Weekly Queue Summary"). Select the globe if you would like to add translations.



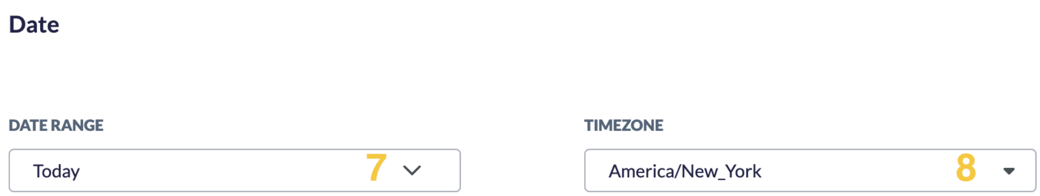
3. Provide a more detailed **description** of the report's purpose. Select the globe if you would like to add translations.

4. Identifier- This field may be automatically populated with a unique identifier for the report.

5. Select the **type** of report you want to generate from the dropdown menu (e.g., Agent Performance, Queue Performance).

6. Specify the desired **filename** for the exported report.

7. Select the date or **Date Range** from the dropdown menu. You can choose "Today" for the current day's data or specify a custom range.



XBert Tip: To pull a range past 30 days,...

8. Select the appropriate **Timezone** for the report data.

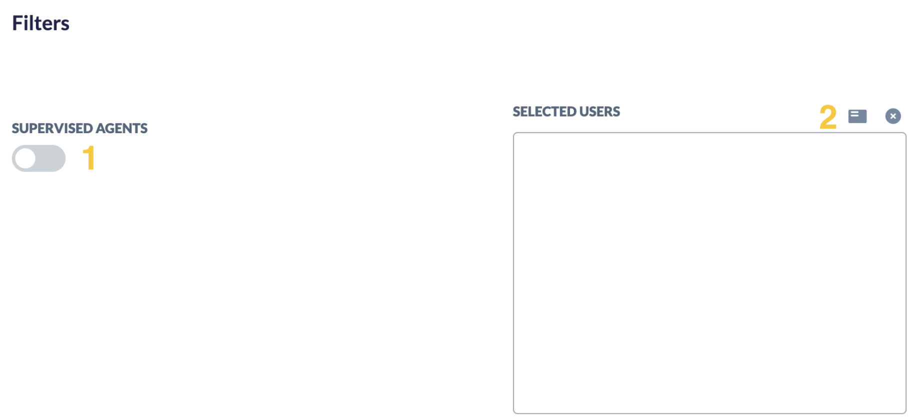
9. Choose the specific agent dispositions you want to include in the report (e.g., Sale, No Sale, Call Back).

Apply Filters

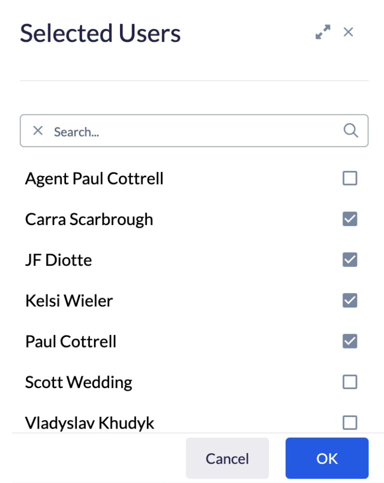
Filters will populate depending on the survey type selected in Information.

Supervised Agents

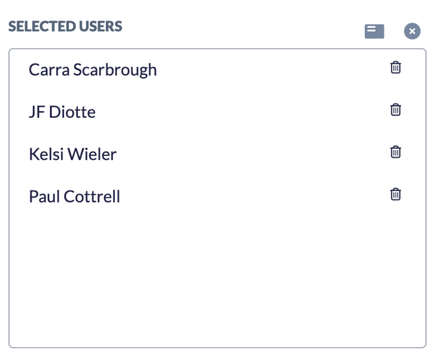
If you want to filter the report data for specific agents, select them here.



1. Toggle **Supervised Agents** to turn on the filter.
2. Select the **File** icon to populate a list of users.
3. Check the users you would like to report on.

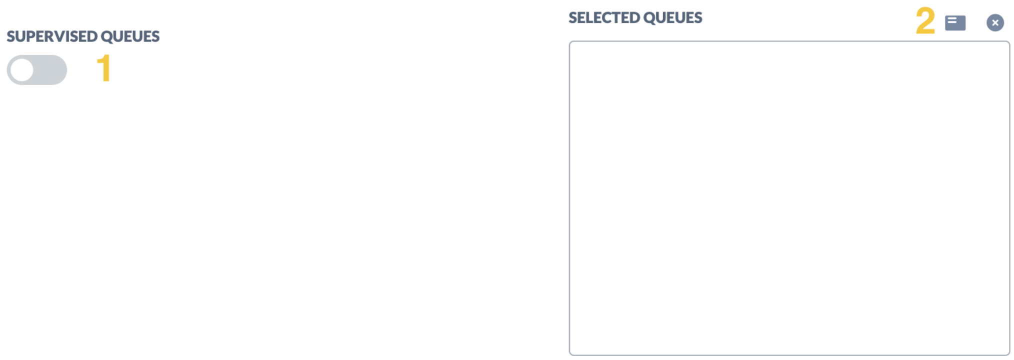


4. Select **OK**. This will add the selected users onto the filter screen.

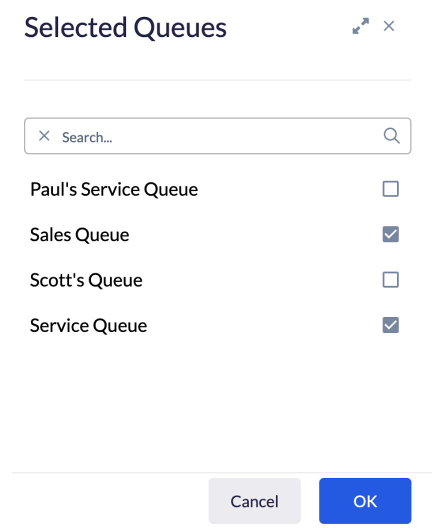


Supervised Queues

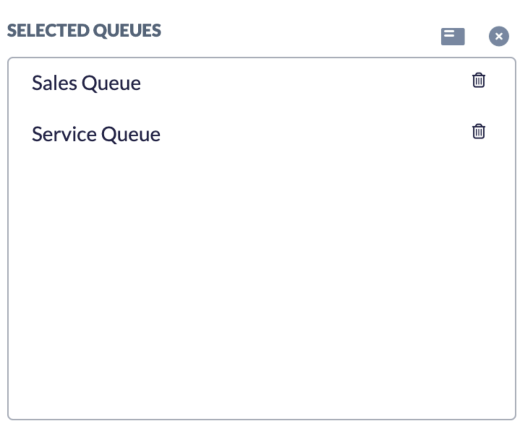
Filter the report data for specific queues.



1. Toggle **Supervised Queues** to turn on the filter.
2. Select the **File** icon to populate a list of queues.
3. Check the queues you would like to report on.



4. Select **OK**. This will add the selected users onto the filter screen.



Last Agent Only

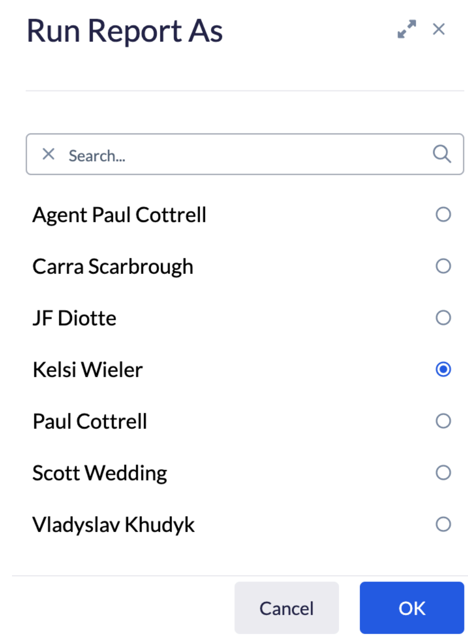
Toggle **Last Agent Only** if you only want to include data for the last agent who interacted with a contact.

Schedule

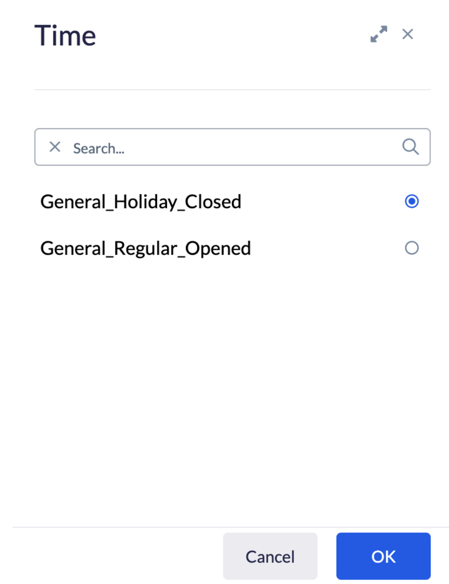
Run Report As

1. Select the **file icon**.

2. Select the name of the user you want to run the report as.
3. Select **OK**.

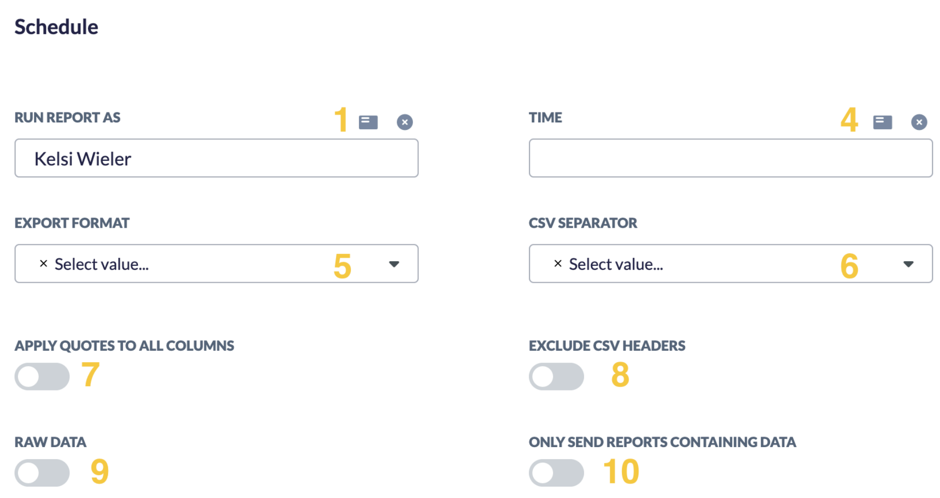


4. Specify the time to run the report, if applicable.
   a. Selecting the **file icon**.
   b. Select the business hours.
   c. Select **OK**.



Export Format

5. Select the desired format for the exported report (e.g., CSV, PDF).



6. If exporting to CSV, choose the separator character (e.g., comma, colon, semicolon).
7. Check the **Apply Quotes to All Columns** box to enclose all CSV values in quotes.
8. Check the **Exclude CSV Headers**box to exclude column headers from the CSV file.
9. Check the **Raw Data** box to include raw data in the report.
10. Check the **Only Send Reports Containing Data** box to only receive reports that contain data.

Schedule Field Mappings

Configure any necessary field mappings for the report data.

Set Delivery Options

Email Account

If you want to receive the report via email, select the email account to send the report from.

1. Select the **file icon** to select the user's email account.

2. Select **OK**.

Email Recipients

Enter the email addresses of the recipients.

Email Subject

Enter the subject line for the email.

File Server

If you want to save the report to a file server, configure the server settings.

1. Select the **file icon** to search for the File Server.

2. Select OK.

Save the Report

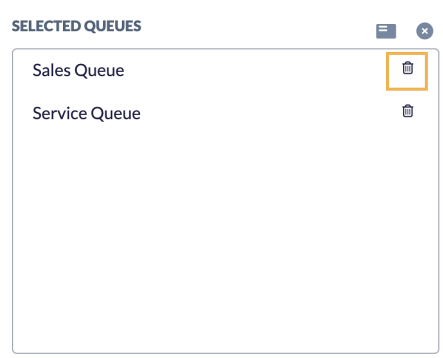
Select the **Save** (floppy disk) icon to save the report.

Run the Report

1. Configure all the settings and save the report, as needed.
2. Select the **Run Report** (play) button to run the report.

Delete a Selected Filter Unit

1. From the Report page, select the report you would like to edit.
2. Select the **Edit** (pencil) icon to edit the report.
3. Locate the **filter unit** you would like to delete.
4. Select the **delete** (trashcan) icon next to the name of the filter.



Delete a Filter Field

1. Locate the entire field you would like to delete the selected options from.

2. Select the X above the filter.

Delete the Report

1. From the reports page, select the name of the report you would like to delete.

2. Select the **delete** (trash can) icon.

Common Report Types

Agent Disposition Report

Our Agent Disposition Reports provide a powerful tool for analyzing agent performance and identifying areas for improvement. These reports offer a clear visual representation of how each agent handles customer interactions, breaking down call outcomes (dispositions) to reveal valuable insights.

With Agent Disposition Reports, you can:

- **Quickly compare agent performance:** See at a glance how many calls each agent handles and the outcomes of those interactions.
- **Identify top performers:** Recognize agents who excel at connecting with customers and achieving desired results.
- **Pinpoint areas for improvement:** Identify agents who may need additional training or support based on their call disposition patterns.
- **Analyze trends:** Spot trends in call outcomes to proactively address potential issues and optimize contact center operations.

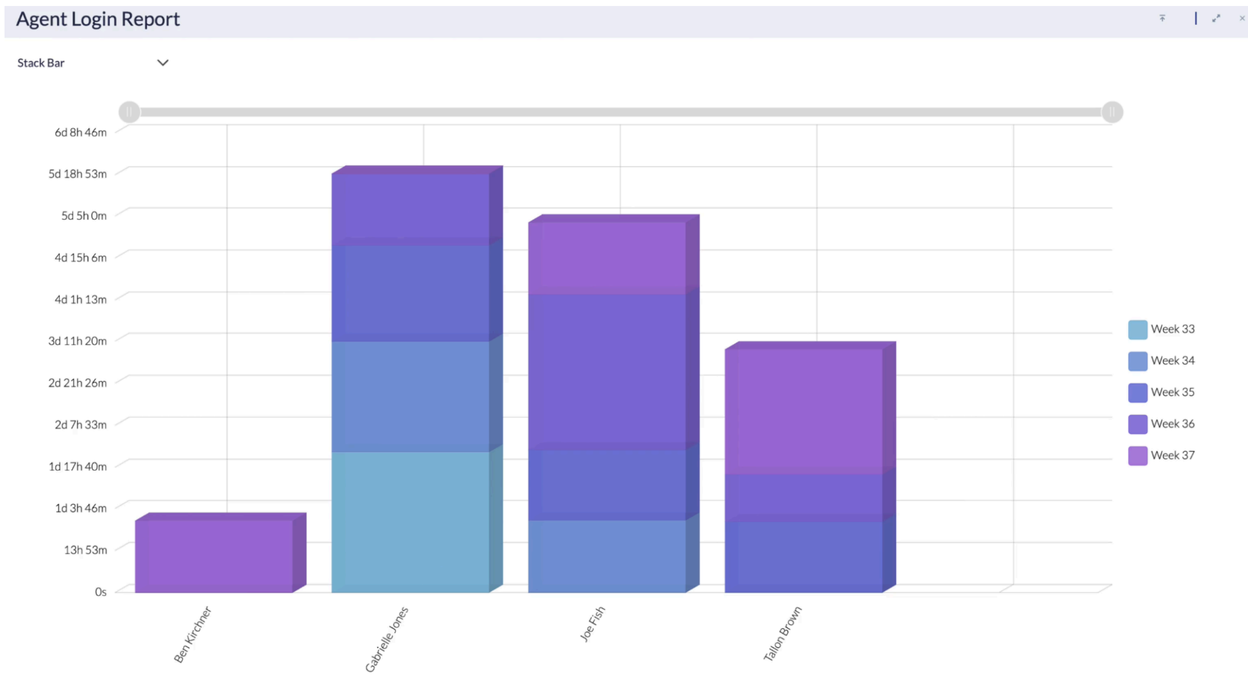
Leverage the power of Agent Disposition Reports to make data-driven decisions, improve agent effectiveness, and enhance the overall customer experience.

Create an Agent Disposition Report

1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Agent Disposition - Weekly Summary"). Optionally, add **translations** by selecting the globe icon.
5. Provide a detailed **description** of the report's purpose.
6. Add **translations** if needed.
7. From the dropdown menu, select **Agent Disposition.**
8. Enter the desired **filename** for the exported report (e.g., "Agent_Disposition_Report").
9. Choose the **date** or **date rang**e for the report data. You can select "Today" for the current day's data or specify a custom range.
10. Select the appropriate **timezone** for the report data.
11. Toggle **Supervised Agents** to ON.
12. Select the File icon to select specific **agents** to include in the report.
13. Check the boxes next to the desired agents and select **OK**.
14. Toggle **Supervised Queues** to ON.
15. Select the File icon to select specific **queues** to include in the report.
16. Check the boxes next to the desired queues and select **OK**.
17. Toggle **Last Agent Only** to ON if you only want to include data for the last agent who interacted with a contact.
18. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
19. Select the **Generate Report** button to create the report.

Agent Login Report

Stay informed about your agents' login activity with our comprehensive Agent Login Reports. These reports provide a visual overview of when and for how long each agent is logged in, allowing you to monitor their availability and track their activity over time.



With Agent Login Reports, you can:

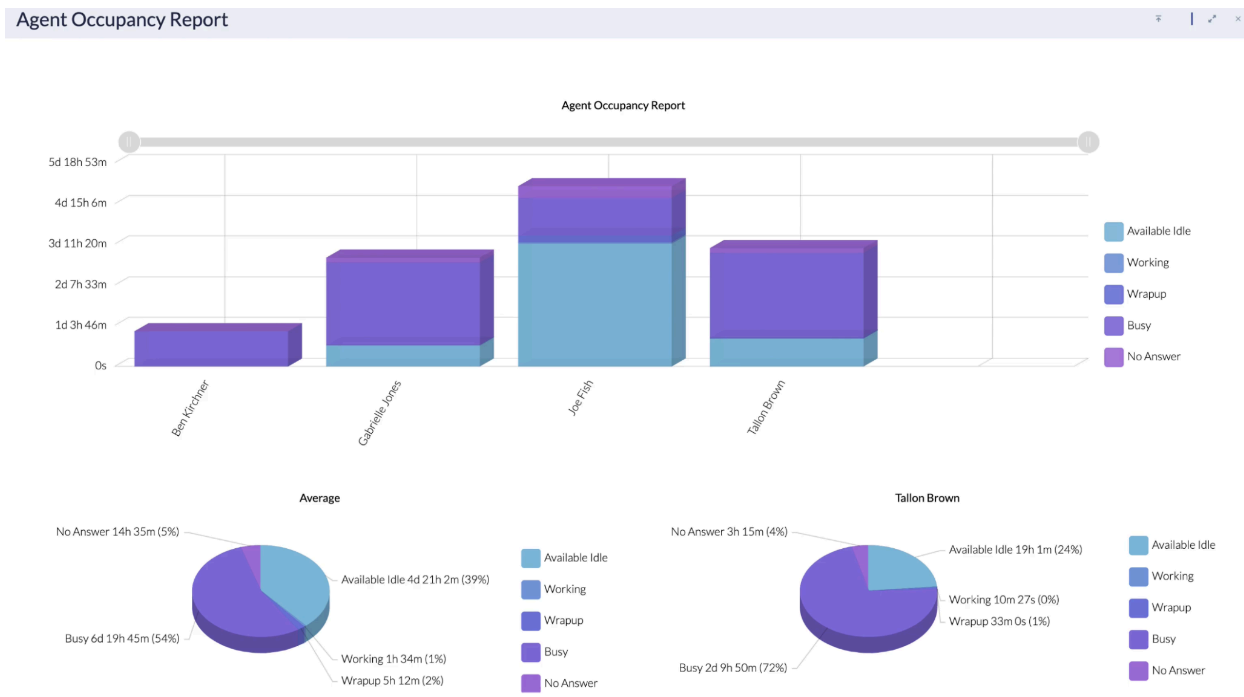
- Monitor agent availability: Quickly see which agents are logged in and available to handle customer interactions.
- Track login trends: Identify patterns in agent login activity, such as peak login times or periods of low activity.
- Analyze agent activity: Understand how much time agents spend logged in and identify any potential issues with absenteeism or adherence to schedules.
- Optimize staffing levels: Use the data to make informed decisions about staffing levels and ensure you have adequate coverage during peak hours.

Create an Agent Login Report

1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Agent Login - Weekly Overview").
5. Optionally, add **translations** by selecting the globe icon.
6. Provide a detailed **description** of the report's purpose.
7. Add **translations** if needed.
8. From the dropdown menu, select **Agent Login.**
9. Enter the desired **filename** for the exported report (e.g., "Agent_Login_Report").
10. Choose the **date** or **date rang**e for the report data. You can select "Today" for the current day's data or specify a custom range.
11. Select the appropriate **timezone** for the report data.
12. Toggle **Supervised Agents** to ON.
13. Select the File icon to select specific **agents** to include in the report.
14. Check the boxes next to the desired agents and select **OK**.
15. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
16. Select the **Generate Report** button to create the report.

Agent Occupancy Report

Gain a comprehensive understanding of how your agents spend their time with Agent Occupancy Reports. These reports provide detailed insights into agent activity, breaking down their time spent on various tasks such as handling calls, wrap-up activities, availability, and idle time.



With Agent Occupancy Reports, you can:

- **Identify productivity bottlenecks:** Pinpoint areas where agents may be spending excessive time on non-productive tasks.
- **Optimize workflows:** Streamline processes and improve efficiency by identifying areas where adjustments can be made to reduce idle time or wrap-up durations.
- **Monitor agent performance:** Track individual agent activity and identify those who may require additional training or support.
- **Improve staffing decisions:** Make data-driven decisions about staffing levels to ensure optimal coverage and minimize customer wait times.
- **Enhance overall efficiency:** Gain a holistic view of agent activity to identify trends and areas for improvement, ultimately leading to increased productivity and a better customer experience.

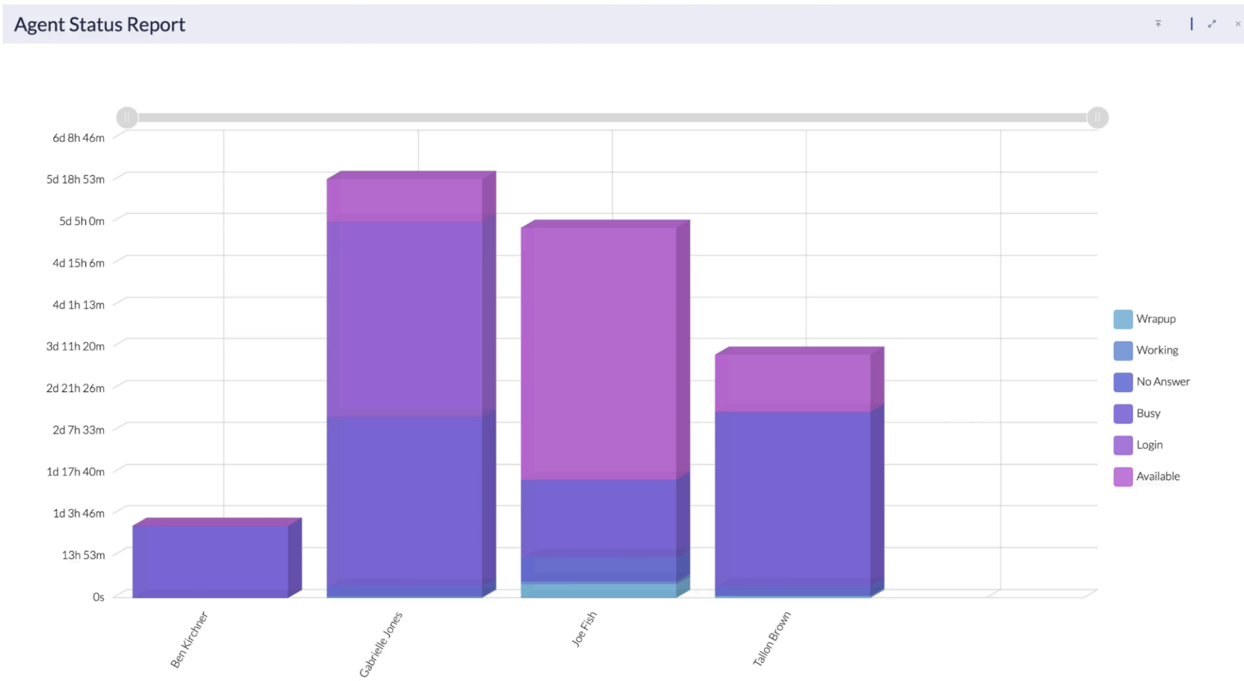
By leveraging the data provided in Agent Occupancy Reports, you can make informed decisions to optimize your contact center operations, improve agent performance, and enhance customer satisfaction.

Create an Agent Occupancy Report

1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Agent Occupancy - Daily Summary"). Optionally, add **translations** by selecting the globe icon.
5. Provide a detailed **description** of the report's purpose.
6. Add **translations** if needed.
7. From the dropdown menu, select **Agent Occupancy.**
8. Enter the desired **filename** for the exported report (e.g., "Agent_Occupancy_Report").
9. Choose the **date** or **date range** for the report data. You can select "Today" for the current day's data or specify a custom range.
10. Select the appropriate **timezone** for the report data.
11. Toggle **Supervised Agents** to ON.
12. Select the File icon to select specific **agents** to include in the report.
13. Check the boxes next to the desired agents and select **OK**.
14. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
15. Select the **Generate Report** button to create the report.

Agent Status Report

Gain valuable insights into how your agents spend their time with our Agent Status Reports. These reports provide a visual breakdown of agent activity across various statuses, allowing you to identify areas for improvement and optimize productivity.



With Agent Status Reports, you can:

- **Track agent activity:** See how agents allocate their time across different tasks and statuses.
- **Identify productivity bottlenecks:** Pinpoint areas where agents may be spending excessive time on non-productive activities.
- **Compare agent performance:** See how individual agents compare in terms of their time allocation and productivity.
- **Optimize workflows:** Streamline processes and improve efficiency by identifying areas where adjustments can be made.
- **Improve staffing decisions:** Make data-driven decisions about staffing levels to ensure optimal coverage.

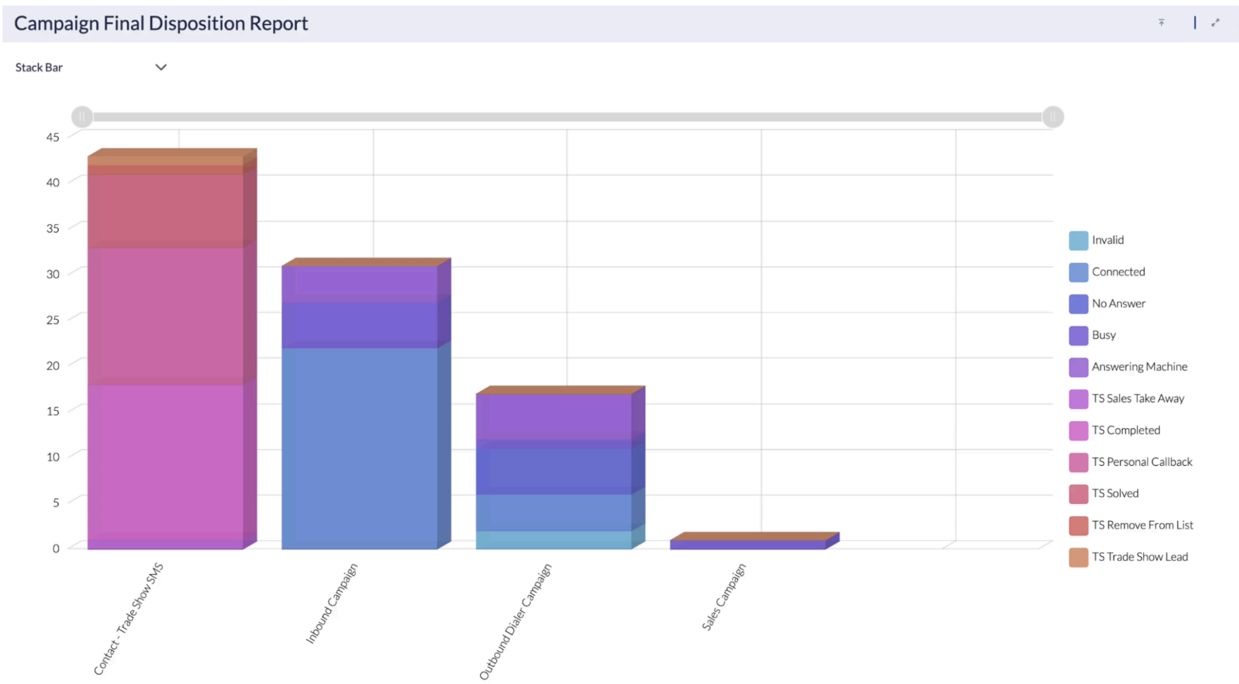
By leveraging the data provided in Agent Status Reports, you can make informed decisions to improve agent performance, enhance contact center efficiency, and ultimately provide a better customer experience.

Create an Agent Status Report

1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Agent Status Report - Daily Summary"). Optionally, add **translations** by selecting the globe icon.
5. Provide a detailed **description** of the report's purpose.
6. Add **translations** if needed.
7. From the dropdown menu, select **Agent Status.**
8. Enter the desired **filename** for the exported report (e.g., "Agent_Status_Report").
9. Choose the **date** or **date rang**e for the report data. You can select "Today" for the current day's data or specify a custom range.
10. Select the appropriate **timezone** for the report data.
11. Toggle **Supervised Agents** to ON.
12. Select the File icon to select specific **agents** to include in the report.
13. Check the boxes next to the desired agents and select **OK**.
14. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
15. Select the **Generate Report** button to create the report.

Campaign Final Disposition Report

Gain valuable insights into the effectiveness of your campaigns with our Campaign Final Disposition Reports. These reports provide a clear visual representation of how each campaign performs in terms of its final call outcomes. Each bar represents a different campaign, and the segments within each bar show the proportion of calls that resulted in each specific disposition.



Here's what you can learn from this report:

- **Campaign Performance:** Compare the overall performance of different campaigns by looking at the height of the bars. Taller bars indicate a higher volume of calls for that campaign.
- **Disposition Breakdown:** Analyze the distribution of dispositions within each campaign. This helps you understand which outcomes are most common for each campaign and identify any potential issues or areas for improvement.
- **Identify Trends:** Look for patterns in the data across different campaigns. For example, if a particular disposition is consistently high across multiple campaigns, it might suggest a need for broader changes in your contact center strategies or agent training.

Possible Insights and Actions:

- **Optimize Campaign Strategies:** Identify campaigns with high rates of negative dispositions (e.g., no answer, busy, invalid) and adjust your dialing strategies, contact lists, or calling times to improve contact rates.
- **Improve Agent Performance:** If certain dispositions are prevalent across multiple campaigns, it could indicate a need for additional agent training or coaching to improve their ability to handle specific call scenarios.
- **Refine Targeting:** Analyze the dispositions for each campaign to assess whether you are targeting the right audience with the right message. Adjust your targeting strategies as needed to improve overall campaign effectiveness.

This report empowers you to make data-driven decisions to optimize your campaigns, improve agent performance, and enhance the overall success of your contact center operations.

Create a Campaign Final Disposition Report

1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Campaign Final Disposition"). Optionally, add **translations** by selecting the globe icon.
5. Provide a detailed **description** of the report's purpose.
6. Add **translations** if needed.
7. From the dropdown menu, select **Campaign Final Disposition.**
8. Enter the desired **filename** for the exported report (e.g., "Campaign_Final_Disposition_Report").
9. Choose the **date** or **date rang**e for the report data. You can select "Today" for the current day's data or specify a custom range.
10. Select the appropriate **timezone** for the report data.
11. Toggle **Supervised Campaigns** to ON.
12. Select the File icon to select specific **campaigns** to include in the report.
13. Check the boxes next to the desired campaigns and select **OK**.
14. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
15. Select the **Generate Report** button to create the report.

Campaign Queue Summary Reports

Gain valuable insights into the efficiency and effectiveness of your queues with Campaign Queue Summary Reports. These reports provide key metrics to help you understand how your queues are performing and identify areas for improvement.

Campaign Queue Summary Report

NAME	QUEUE	TOTAL	TYPE	ANSWERED	ABANDONED	SLA	MQT	AQT
Inbound Campaign	Sales	1	Voice	0	1	100.00%	16s	16s
Inbound Campaign	Support	14	Voice	13	1	93.00%	45s	6s
Contact - Trade Show SMS	Sales	20	Voice	15	5	90.00%	1m 28s	16s
Inbound Campaign	Sales Queue	19	Voice	17	2	100.00%	6s	4s

With Campaign Queue Summary Reports, you can:

- **Track key metrics:** Monitor essential data such as the number of answered calls, abandoned calls, average wait time, and service level agreement (SLA) adherence.
- **Identify bottlenecks:** Pinpoint queues with high abandonment rates or long wait times, indicating potential issues that need to be addressed.
- **Optimize queue management:** Make informed decisions about staffing levels, call routing strategies, and agent training to improve queue performance.
- **Enhance customer experience:** Reduce customer wait times and improve satisfaction by addressing queue inefficiencies.
- **Increase efficiency:** Streamline your contact center operations and ensure that calls are handled promptly and effectively.

By leveraging the data provided in Campaign Queue Summary Reports, you can make data-driven decisions to optimize your queues, improve agent performance, and enhance the overall customer experience.

Create a Campaign Queue Summary Reports

1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Campaign Queue Summary"). Optionally, add **translations** by selecting the globe icon.
5. Provide a detailed **description** of the report's purpose.
6. Add **translations** if needed.
7. From the dropdown menu, select **Campaign Queue Summary.**
8. Enter the desired **filename** for the exported report (e.g., "Campaign_Queue_Summary_Report").
9. Choose the **date** or **date rang**e for the report data. You can select "Today" for the current day's data or specify a custom range.
10. Select the appropriate **timezone** for the report data.
11. Toggle **Supervised Campaigns** to ON.
12. Select the File icon to select specific **campaigns** to include in the report.
13. Check the boxes next to the desired campaigns and select **OK**.
14. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
15. Select the **Generate Report** button to create the report.

Campaign Volume Summary Reports

Gain a comprehensive overview of your call volume distribution across different campaigns and channels with Campaign Volume Summary Reports. These reports provide valuable insights to help you understand call patterns and optimize resource allocation.

Campaign Volume Summary Report

Grid

NAME	INBOUND CALLS	OUTBOUND CALLS	PROGRESSIVE	PREDICTIVE/QB	CHATS
Outbound Dialer Campaign	0	0	0	17	0
Inbound Campaign	45	1	0	0	0
Contact - Trade Show SMS	20	28	0	0	0
Test Campaign	4	1	0	0	0

With Campaign Volume Summary Reports, you can:

- **Monitor call volume:** Track the number of inbound, outbound, and internal calls across various campaigns.
- **Analyze channel performance:** Assess the effectiveness of different channels, such as voice, chat, and email, to identify areas of focus.
- **Identify peak hours:** Understand call volume patterns throughout the day to optimize staffing levels and ensure adequate coverage during peak times.
- **Allocate resources effectively:** Make informed decisions about resource allocation based on call volume distribution across campaigns and channels.
- **Improve forecasting:** Use historical call volume data to predict future call patterns and adjust staffing and resource planning accordingly.

By leveraging the data provided in Campaign Volume Summary Reports, you can gain a clear understanding of your call volume trends, optimize resource allocation, and improve the overall efficiency of your contact center operations.

Create a Campaign Volume Summary Report

1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Campaign Volume Summary"). Optionally, add **translations** by selecting the globe icon.
5. Provide a detailed **description** of the report's purpose.
6. Add **translations** if needed.
7. From the dropdown menu, select **Campaign Volume Summary.**
8. Enter the desired **filename** for the exported report (e.g., "Campaign_Volume_Summary_Report").
9. Choose the **date** or **date rang**e for the report data. You can select "Today" for the current day's data or specify a custom range.
10. Select the appropriate **timezone** for the report data.
11. Toggle **Supervised Campaigns** to ON.
12. Select the File icon to select specific **campaigns** to include in the report.
13. Check the boxes next to the desired campaigns and select **OK**.
14. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
15. Select the **Generate Report** button to create the report.

Failed Outbound Leads Report

Gain valuable insights into the effectiveness of your outbound calling campaigns with Failed Outbound Leads Reports. These reports provide detailed information about calls that were not successfully connected, allowing you to identify and address potential issues.

Failed Outbound Leads Report

NAME	CAMPAIGN	DISPOSITION	CREATED AT	DURATION	FROM
Outbound Dialer List 8/30/24	Outbound Dialer Campai...	Invalid	08/30/2024 14:26:59	34s	+14803935357
Outbound Dialer List 8/30/24	Outbound Dialer Campai...	Invalid	08/30/2024 14:27:48	16s	+14803935357
Outbound List 8/28/24	Outbound Dialer Campai...	Invalid	08/28/2024 15:16:39	7s	+14803935357
Outbound Dialer List 8/30/24	Outbound Dialer Campai...	Invalid	08/30/2024 14:26:10	16s	+14803935357
Outbound List 8/28/24	Outbound Dialer Campai...	Invalid	08/28/2024 15:16:11	12s	+14803935357
Outbound List 8/28/24	Outbound Dialer Campai...	Invalid	08/28/2024 15:18:10	0s	+14803935357
Outbound List 8/28/24	Outbound Dialer Campai...	Invalid	08/28/2024 15:17:42	14s	+14803935357
Outbound Dialer List 8/30/24	Outbound Dialer Campai...	Invalid	08/30/2024 14:28:44	29s	+14803935357
Outbound Dialer List 8/29/24	Outbound Dialer Campai...	Invalid	08/29/2024 13:46:36	15s	+14803935357
Outbound Dialer List 8/30/24	Outbound Dialer Campai...	Invalid	08/30/2024 14:26:38	13s	+14803935357

With Failed Outbound Leads Reports, you can:

- **Track unsuccessful calls:** Monitor the number of calls that resulted in invalid numbers, busy signals, no answers, or other unsuccessful outcomes.
- **Identify problematic campaigns:** Pinpoint specific campaigns or dialing lists that have a high rate of failed calls.
- **Analyze call patterns:** Understand the reasons behind failed calls and identify any trends or patterns that may indicate underlying issues.
- **Improve contact rates:** Take corrective action to improve contact rates, such as updating contact lists, adjusting dialing times, or refining dialing strategies.
- **Optimize agent efficiency:** Reduce wasted time and effort by minimizing the number of unsuccessful calls agents have to handle.

By leveraging the data provided in Failed Outbound Leads Reports, you can improve the efficiency and effectiveness of your outbound calling campaigns, increase contact rates, and maximize your agents' productivity.

Create a Failed Outbound Leads Report

1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Failed Outbound Leads"). Optionally, add **translations** by selecting the globe icon.
5. Provide a detailed **description** of the report's purpose.
6. Add **translations** if needed.
7. From the dropdown menu, select **Failed Outbound Leads.**
8. Enter the desired **filename** for the exported report (e.g., "Failed_Outbound_Leads_Report").
9. Choose the **date** or **date range** for the report data. You can select "Today" for the current day's data or specify a custom range.
10. Select the appropriate **timezone** for the report data.
11. Search the Outbound Leads list to select specific Outbound Leads.
12. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
13. Select the **Generate Report** button to create the report.

Outbound Detail Disposition Reports

Gain granular insights into your outbound calling activities with Outbound Detail Disposition Reports. These reports provide a comprehensive view of individual call outcomes, empowering you to identify trends, troubleshoot issues, and optimize your campaigns.

Outbound Detail Disposition Report

NAME	CAMPAIGN	DISPOSITION	CREATED AT	DURATION	FROM	AGENT	TO
Outbound Dialer List 8/30/24	Outbound Dialer Campai...	Answering Machine	08/30/2024 14:26:59	34s	+14803935357	Gabrielle Jones	+14805660257
Outbound Dialer List 8/30/24	Outbound Dialer Campai...	No Answer	08/30/2024 14:27:48	16s	+14803935357	Gabrielle Jones	+15203332983
Outbound List 8/28/24	Outbound Dialer Campai...	Answering Machine	08/28/2024 15:16:39	7s	+14803935357	Gabrielle Jones	+14808652537
Outbound Dialer List 8/30/24	Outbound Dialer Campai...	Connected	08/30/2024 14:26:10	16s	+14803935357	Gabrielle Jones	+14808652536
Outbound List 8/28/24	Outbound Dialer Campai...	Busy	08/28/2024 15:16:11	12s	+14803935357	Gabrielle Jones	+12087576342
Outbound List 8/28/24	Outbound Dialer Campai...	No Answer	08/28/2024 15:18:10	0s	+14803935357		+14808008543
Outbound List 8/28/24	Outbound Dialer Campai...	No Answer	08/28/2024 15:17:42	14s	+14803935357	Gabrielle Jones	+15203332983
Outbound Dialer List 8/30/24	Outbound Dialer Campai...	Connected	08/30/2024 14:28:44	29s	+14803935357	Gabrielle Jones	+12087576342
Outbound Dialer List 8/29/24	Outbound Dialer Campai...	Connected	08/29/2024 13:46:36	15s	+14803935357	Gabrielle Jones	+16029754621
Outbound Dialer List 8/30/24	Outbound Dialer Campai...	Invalid	08/30/2024 14:26:38	13s	+14803935357	Gabrielle Jones	+16029754621
Outbound Dialer List 8/30/24	Outbound Dialer Campai...	Answering Machine	08/30/2024 14:28:16	17s	+14803935357	Gabrielle Jones	+14808652537
Outbound List 8/28/24	Outbound Dialer Campai...	Answering Machine	08/28/2024 15:15:36	21s	+14803935357	Gabrielle Jones	+14808652536
Outbound List 8/28/24	Outbound Dialer Campai...	Invalid	08/28/2024 15:18:17	27s	+14803935357	Gabrielle Jones	+16029754621
Outbound List 8/28/24	Outbound Dialer Campai...	Connected	08/28/2024 15:17:00	23s	+14803935357	Gabrielle Jones	+14805660257
Outbound Dialer List 8/30/24	Outbound Dialer Campai...	No Answer	08/30/2024 14:29:33	0s	+14803935357		+14808008543

With Outbound Detail Disposition Reports, you can:

- **Analyze individual call outcomes:** See the specific disposition (e.g., connected, no answer, busy, invalid) for each outbound call attempt.
- **Identify problematic calls:** Pinpoint calls that resulted in unsuccessful outcomes and investigate the reasons behind them.
- **Monitor agent performance:** Track individual agent activity and identify areas where coaching or training may be needed.
- **Troubleshoot issues:** Quickly identify and address problems such as invalid numbers, incorrect contact information, or ineffective dialing times.
- **Refine dialing strategies:** Analyze call patterns and adjust your strategies to improve contact rates and maximize agent productivity.

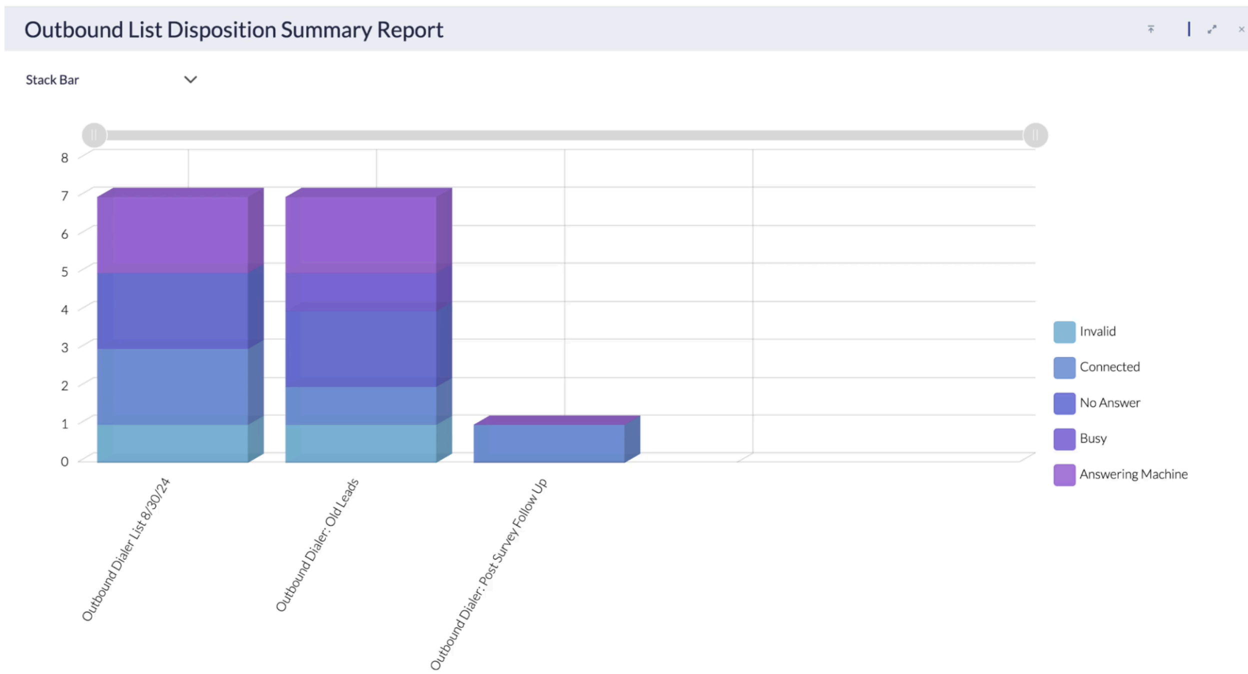
By leveraging the detailed information provided in these reports, you can gain a deeper understanding of your outbound calling performance, identify areas for improvement, and make data-driven decisions to optimize your campaigns.

Create an Outbound Detail Disposition Report

1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Outbound Detail Dispositions"). Optionally, add **translations** by selecting the globe icon.
5. Provide a detailed **description** of the report's purpose.
6. Add **translations** if needed.
7. From the dropdown menu, select **Outbound Detail Disposition.**
8. Enter the desired **filename** for the exported report (e.g., "Outbound_Detail_Disposition_Report").
9. Choose the **date** or **date rang**e for the report data. You can select "Today" for the current day's data or specify a custom range.
10. Select the appropriate **timezone** for the report data.
11. Search the Outbound Dispositions list to select specific Outbound Dispositions.
12. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
13. Select the **Generate Report** button to create the report.

Outbound List Disposition Reports

Gain a clear understanding of your outbound calling list performance with our List Disposition Summary Reports. These reports provide valuable insights into the effectiveness of your lists and help you identify areas for improvement.



With List Disposition Summary Reports, you can:

- **Visualize call outcomes:** See at a glance the proportion of successful calls versus unsuccessful attempts (invalid numbers, busy signals, no answers, etc.) for each of your outbound lists.
- **Pinpoint problem areas:** Quickly identify lists with high rates of unsuccessful calls, enabling you to take immediate action to update contact information or adjust dialing strategies.
- **Improve contact rates:** Make data-driven decisions to optimize your lists and increase the efficiency of your outbound campaigns.
- **Maximize agent productivity:** Reduce wasted time and effort by ensuring your agents are focusing on the most promising leads.
- **Enhance campaign effectiveness:** Gain a clear understanding of list performance to improve overall campaign outcomes and achieve your business goals.

By leveraging the data provided in List Disposition Summary Reports, you can optimize your outbound calling efforts, improve contact rates, and maximize the return on your investment.

Create an Outbound List Disposition Report

1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Outbound List Dispositions"). Optionally, add **translations** by selecting the globe icon.
5. Provide a detailed **description** of the report's purpose.
6. Add **translations** if needed.
7. From the dropdown menu, select **Outbound List Disposition.**
8. Enter the desired **filename** for the exported report (e.g., "Outbound_List_Disposition_Report").
9. Choose the **date** or **date rang**e for the report data. You can select "Today" for the current day's data or specify a custom range.
10. Select the appropriate **timezone** for the report data.
11. Search the Outbound Dispositions list to select specific Outbound Dispositions.
12. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
13. Select the **Generate Report** button to create the report.

Queue Interval Reports

Gain deeper insights into your queue activity with Queue Interval Reports. These reports provide a detailed breakdown of queue performance over specific time intervals, allowing you to identify trends and optimize your contact center operations.

Queue Interval Report

NAME	QUEUE	DATE	ANSWER BEFOR...	ANSWER AFTER ...	ANSWERED	ABANDON BEF...	ABANDON AFTE...	ABANDONED	MQT
11:00 - 12:00	Support	2024-09-04	3	0	3	0	0	0	4s
11:00 - 12:00	Total All		3	0	3	0	0	0	4s
22:00 - 23:00	Total All		0	0	0	0	0	0	0s
12:00 - 13:00	Sales	2024-09-13	0	0	0	0	1	1	1m 2s
12:00 - 13:00	Support	2024-09-03	4	0	4	0	0	0	4s
12:00 - 13:00	Total All		4	0	4	0	1	1	1m 2s
16:00 - 17:00	Sales	2024-09-16	1	0	1	0	0	0	21s
16:00 - 17:00	Total All		1	0	1	0	0	0	21s
01:00 - 02:00	Total All		0	0	0	0	0	0	0s
05:00 - 06:00	Total All		0	0	0	0	0	0	0s
21:00 - 22:00	Sales	2024-09-04	2	0	2	0	0	0	20s
21:00 - 22:00	Total All		2	0	2	0	0	0	20s
10:00 - 11:00	Chat	2024-09-09	0	0	0	0	1	1	17m 35s
10:00 - 11:00	Support	2024-09-04	1	0	1	0	0	0	3s
10:00 - 11:00	Chat	2024-09-16	0	0	0	0	1	1	2m 24s
10:00 - 11:00	Total All		1	0	1	0	2	2	17m 35s
	TOTAL ALL		31	1	32	4	5	9	17M 35S

With Queue Interval Reports, you can:

- Monitor queue activity: Track key metrics such as answered calls, abandoned calls, and average wait times over specific time periods.
- Identify peak hours: Pinpoint times of day or days of the week when call volume is highest and adjust staffing levels accordingly.
- Analyze trends: Observe patterns in queue activity to identify potential bottlenecks or areas where adjustments may be needed.
- Optimize staffing: Ensure adequate coverage during peak hours and minimize customer wait times by analyzing call volume trends.
- Improve forecasting: Use historical data to predict future call patterns and adjust staffing and resource planning accordingly.

By leveraging the detailed information provided in Queue Interval Reports, you can gain a comprehensive understanding of your queue performance, identify areas for improvement, and make data-driven decisions to enhance your contact center efficiency.

Create a Queue Interval Report

1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Queue Interval - Weekly"). Optionally, add **translations** by selecting the globe icon.
5. Provide a detailed **description** of the report's purpose.
6. Add **translations** if needed.
7. From the dropdown menu, select **Queue Interval.**
8. Enter the desired **filename** for the exported report (e.g., "Queue_Interval_Report").
9. Choose the **date** or **date rang**e for the report data. You can select "Today" for the current day's data or specify a custom range.
10. Select the appropriate **timezone** for the report data.
11. Toggle **Supervised Queues** to ON.
12. Select the File icon to select specific **queues** to include in the report.
13. Check the boxes next to the desired queues and select **OK**.
14. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
15. Select the **Generate Report** button to create the report.

Queue SLA Reports

Ensure your queues are operating efficiently and meeting your service level targets with Queue SLA Reports. These reports provide key performance indicators to help you assess and improve customer experience.

Queue SLA Report

NAME	TYPE	TOTAL	ANSWERED	ANSWER BEFOR...	% ANSWER BEF...	ANSWER AFTER ...	% ANSWER AFT...	ABANDONED	ABANDON BEF...
Chat	Voice	5	4	3	60.00%	1	20.00%	1	0
Support	Voice	14	13	13	93.00%	0	00.00%	1	0
Chat	Chat	1	0	0	00.00%	0	00.00%	1	0
Sales	Voice	21	15	15	71.00%	0	00.00%	6	4

With Queue SLA Reports, you can:

- **Track key metrics:** Monitor essential data such as answered calls, abandoned calls, and service level agreement (SLA) adherence for each queue.
- **Identify bottlenecks:** Quickly pinpoint queues with high abandonment rates or low SLA attainment, indicating potential areas for improvement.
- **Optimize queue management:** Make informed decisions about staffing levels, call routing strategies, and agent training to enhance queue performance.
- **Improve customer satisfaction:** Reduce customer wait times and improve overall satisfaction by addressing queue inefficiencies.
- **Enhance contact center efficiency:** Gain a clear understanding of how well your queues are meeting service level targets and identify opportunities for optimization.

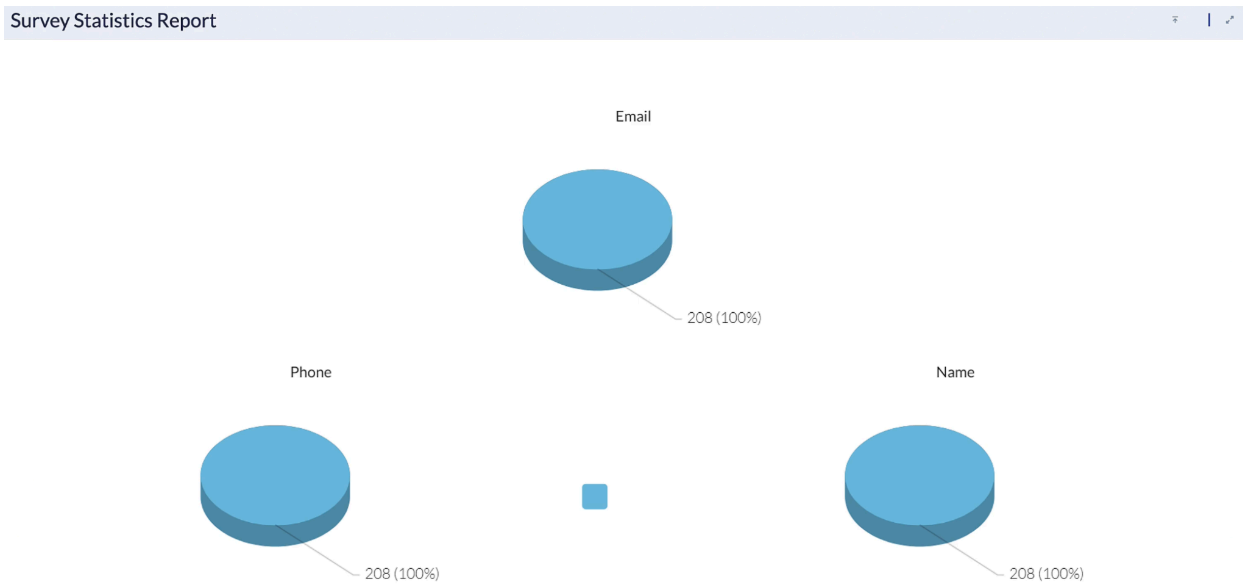
By leveraging the data provided in Queue SLA Reports, you can ensure your queues are operating effectively, improve customer experience, and enhance the overall efficiency of your contact center.

Create a Queue SLA Report

1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Queue SLA - Daily Summary"). Optionally, add **translations** by selecting the globe icon.
5. Provide a detailed **description** of the report's purpose.
6. Add **translations** if needed.
7. From the dropdown menu, select **Queue SLA.**
8. Enter the desired **filename** for the exported report (e.g., "Queue_SLA_Report").
9. Choose the **date** or **date range** for the report data. You can select "Today" for the current day's data or specify a custom range.
10. Select the appropriate **timezone** for the report data.
11. Toggle **Supervised Queues** to ON.
12. Select the File icon to select specific **queues** to include in the report.
13. Check the boxes next to the desired queues and select **OK**.
14. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
15. Select the **Generate Report** button to create the report.

Survey Statistics Report

Understand your customers better and improve their experience with our comprehensive Survey Statistics Reports. These reports provide a clear overview of your survey data, allowing you to analyze participation, identify trends, and measure customer satisfaction.



With Survey Statistics Reports, you can:

- **Track survey participation:** See how many customers are responding to your surveys and through which channels (email, phone, chat).
- **Analyze response trends:** Identify patterns in customer feedback and understand their preferences and pain points.
- **Measure customer satisfaction:** Gauge overall customer satisfaction levels and identify areas for improvement.
- **Optimize survey campaigns:** Assess the effectiveness of your survey campaigns and make data-driven adjustments to improve response rates and gather more valuable insights.
- **Enhance customer experience:** Use survey data to make informed decisions that enhance the customer journey and improve overall satisfaction.

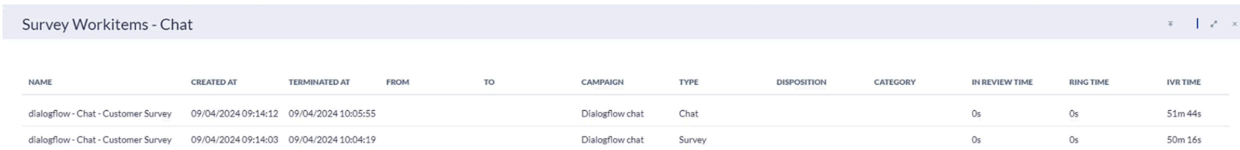
By leveraging the insights provided in Survey Statistics Reports, you can gain a deeper understanding of your customers, improve your products and services, and build stronger customer relationships.

Create a Survey Statistics Report

1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Survey Statistics - Weekly Summary"). Optionally, add **translations** by selecting the globe icon.
5. Provide a detailed **description** of the report's purpose.
6. Add **translations** if needed.
7. From the dropdown menu, select **Survey Statistics.**
8. Enter the desired **filename** for the exported report (e.g., "Survey_Statistics_Report").
9. Choose the **date** or **date range** for the report data. You can select "Today" for the current day's data or specify a custom range.
10. Select the appropriate **timezone** for the report data.
11. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
12. Select the **Generate Report** button to create the report.

Survey Workitems Reports

Dive deeper into your chat-based survey interactions with Survey Workitems Reports. These reports provide detailed information about individual survey conversations conducted through your chat channels.


Survey Workitems - Chat

NAME	CREATED AT	TERMINATED AT	FROM	TO	CAMPAIGN	TYPE	DISPOSITION	CATEGORY	IN REVIEW TIME	RING TIME	IVR TIME
dialogflow - Chat - Customer Survey	09/04/2024 09:14:12	09/04/2024 10:05:55			Dialogflow chat	Chat			0s	0s	51m 44s
dialogflow - Chat - Customer Survey	09/04/2024 09:14:03	09/04/2024 10:04:19			Dialogflow chat	Survey			0s	0s	50m 16s

With Survey Workitems Reports, you can:

- **Track individual survey interactions:** See details like start and end times, participants involved, and the campaign associated with each chat survey.
- **Monitor survey duration:** Understand how long customers are spending on chat surveys, identify potential bottlenecks, and optimize survey design for better engagement.
- **Analyze response patterns:** Identify trends in customer responses and gather valuable insights into their preferences and pain points.
- **Assess agent performance:** If applicable, track individual agent performance in administering and completing chat surveys.
- **Improve customer experience:** Use the insights gained to optimize your chat surveys, improve customer engagement, and gather more valuable feedback.

By leveraging the detailed information provided in Survey Workitems Reports, you can gain a comprehensive understanding of your chat-based survey interactions and make data-driven decisions to improve customer experience and optimize survey campaigns.

Create a Survey Workitems Report

1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Survey Workitems Report"). Optionally, add **translations** by selecting the globe icon.
5. Provide a detailed **description** of the report's purpose.
6. Add **translations** if needed.
7. From the dropdown menu, select **Survey Workitems.**
8. Enter the desired **filename** for the exported report (e.g., "Survey_Workitems_Report").
9. Choose the **date** or **date range** for the report data. You can select "Today" for the current day's data or specify a custom range.
10. Select the appropriate **timezone** for the report data.
11. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
12. Select the **Generate Report** button to create the report.