NEXTIVA CONTACT CENTER

REPORTS GUIDE

CX TRAINING TEAM
VERSION 2.01

Dive deep into historical data and uncover valuable insights with Nextiva Contact Center's powerful reporting system. This guide provides a complete overview of our enhanced reporting capabilities, now including the new Reports Builder feature for creating fully customized reports. With these tools, you can analyze agent performance, track key trends, measure campaign effectiveness, and evaluate customer satisfaction with precision.

Inside This Guide

- Learn how to navigate and access the **reporting dashboard** with ease.
- Follow step-by-step instructions for **generating a variety of standard and customized reports**.
- Discover how to **design and build personalized reports** that align with your unique business goals and metrics.

Explore a range of report categories, including:

- **Agent Reports** – Review performance metrics, login activity, and status details for individual agents.
- **Queue Reports** – Evaluate queue efficiency, identify bottlenecks, and optimize staffing strategies.
- **Outbound/Dialer Reports** – Track outbound campaign performance and identify opportunities for improvement.
- **Campaign Reports** – Gain a comprehensive understanding of campaign activity, including queue metrics, volume summaries, and final dispositions.

With Nextiva Contact Center Reports, you can:

- Make **data-driven decisions** to enhance operations and service quality.
- Increase efficiency and productivity through **informed resource planning**.
- **Identify performance trends** and **opportunities** across teams.
- Elevate the customer experience through **proactive problem-solving**.

This guide equips you with the knowledge and tools to harness the full power of Nextiva Contact Center reporting, transforming complex data into actionable insights that drive measurable success.

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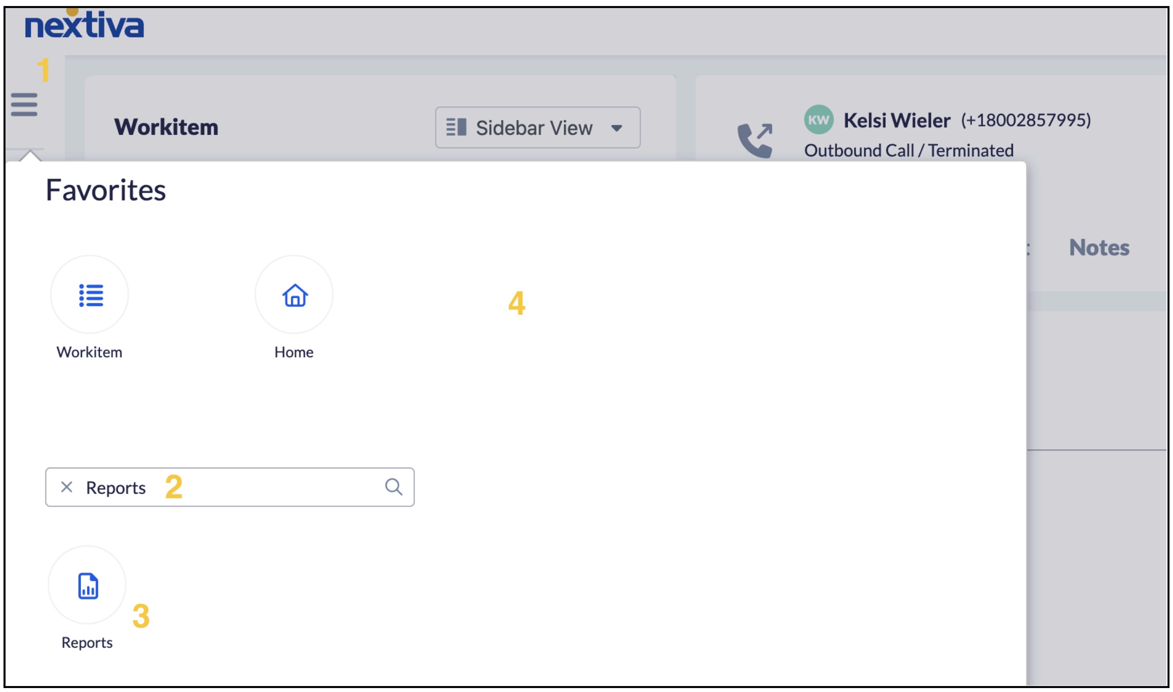
Standard Reports

Accessing Reports

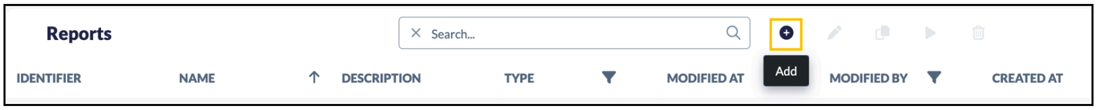
1. Select the **Options icon** in the top left corner of the interface.
2. In the filter section, search for "reports."
3. Select the **Reports icon**. The Reports window will appear.



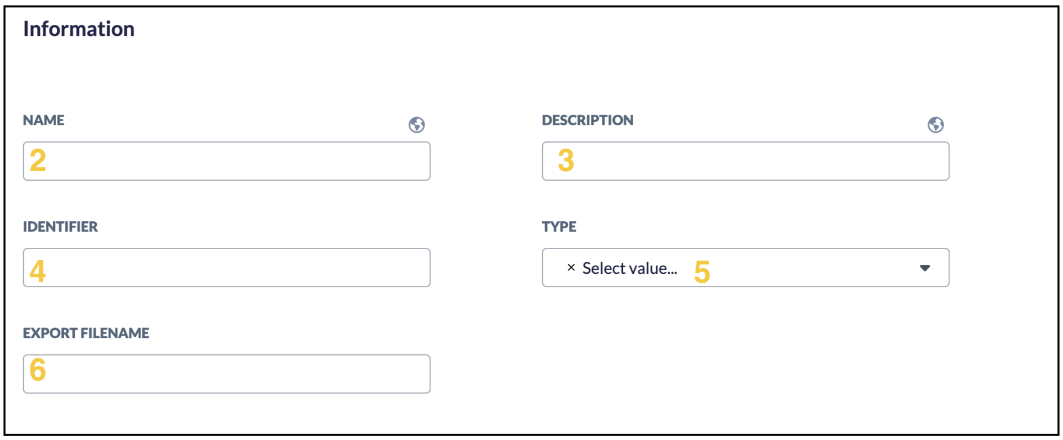
4. (Optional) To add Reports to your favorites, drag the **Reports icon** to the Favorites section. This places the icon in the toolbar at the top for quick access.

Create a New Report

1. Select the **+ (plus sign)** at the top of the Reports section.



2. Enter a descriptive name for your report.



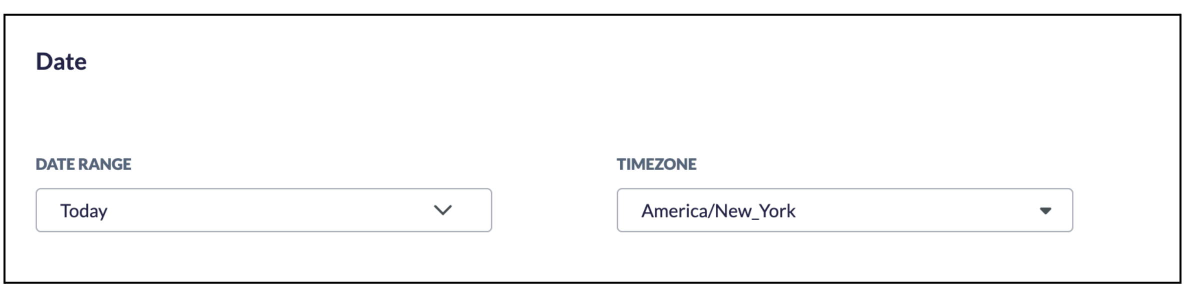
3. (Optional) Provide a brief description to help identify the report's purpose.

4. Enter any identifiers that will help distinguish this report from other reports.

5. Select the desired report type from the dropdown menu.

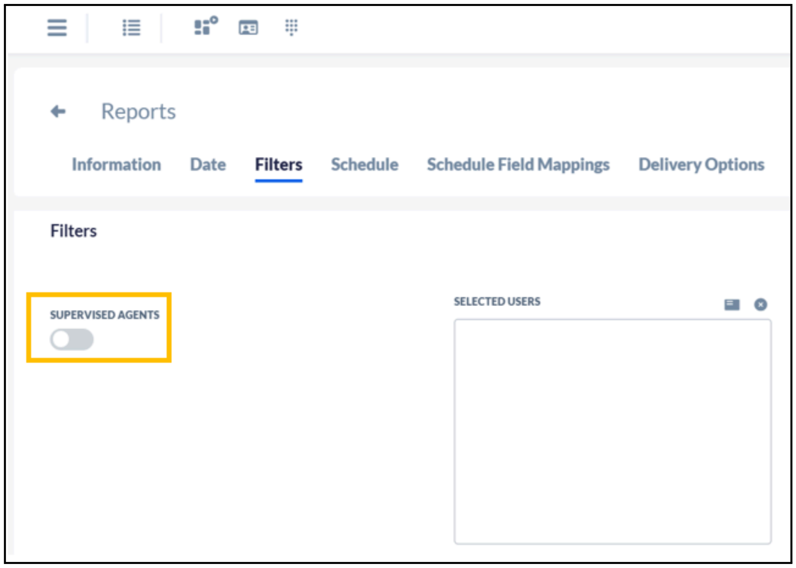
6. Determine the report's export filename.

7. Choose the timeframe for the report (Today, Yesterday, Last 3 Days, This Week, Last Week, This Month, Last Month, Last 30 Days, or Date Range for a custom period).

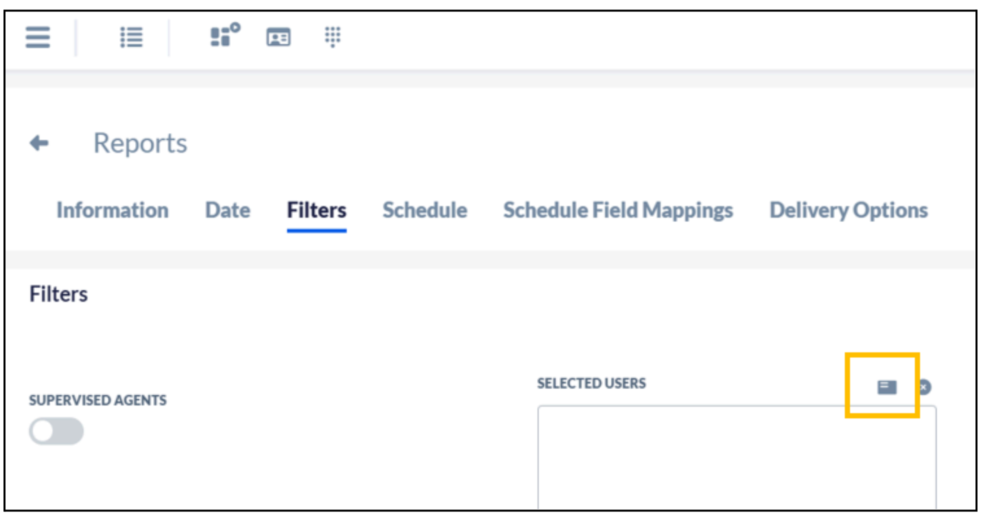


8. Select any relevant Filters:

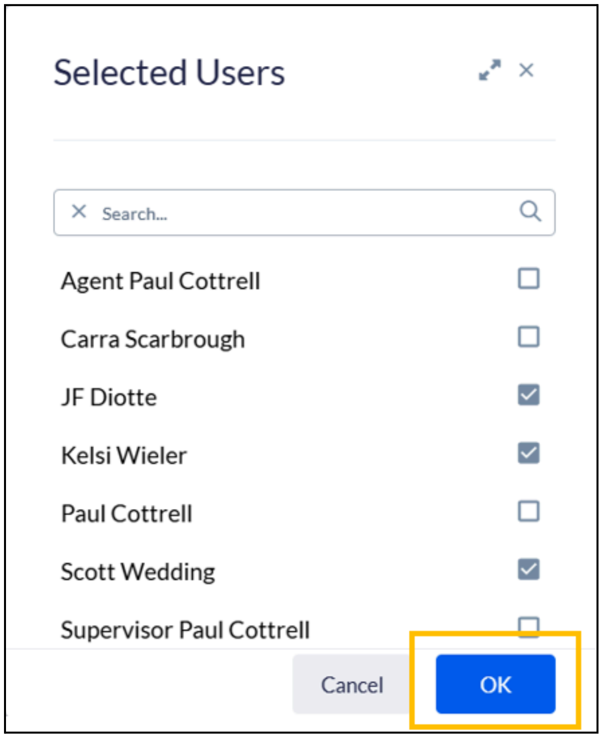
    - To filter by agents, toggle switch under **Supervised Agents** to activate it.



    - Select on the **window icon** next to **Selected Users**.



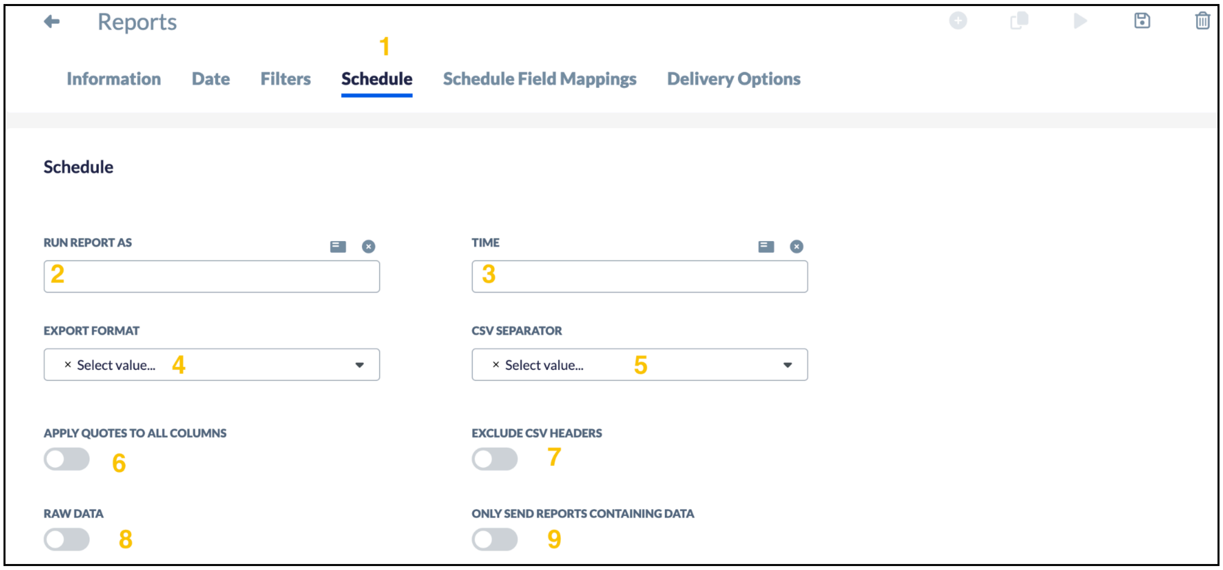
- In the pop-up window, select specific agents by checking the boxes next to their names. Select **OK**.



- To filter by queues, repeat the process with **Supervised Queues** and **Selected Queues**.

Scheduling a Report

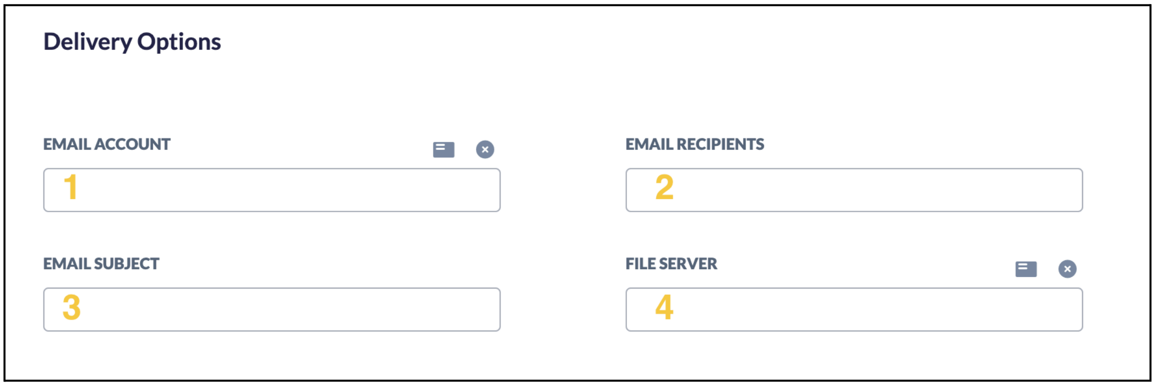
1. Select **Schedule** in the list of options at the top of the window.



2. In **Run Report As**, select the users who should have access to the report.
3. Set the frequency for running the report (e.g., daily, weekly, monthly).
4. Select the **Export Format** from the dropdown menu.
5. Choose **CSV** as the format and select **comma** for the CSV separator.
6. Select **Apply Quotes** if you want quotes added to the columns.
7. Toggle on or off **CSV Headers.**
8. Toggle on or off **Raw Data.**
9. Toggle **Only Send Reports Containing Data** to send reports if they have data (as opposed to blank reports).

Delivery Options

1. Name the **Email Account** if you would like.



2. Under **Email Recipients**, enter the email address(es) where the report should be sent.
3. **Email Subject:** Enter the desired subject line for the email.
4. (Optional) Configure options to send the report to a file server.

Saving and Running a Report

1. Select the **diskette icon (Save icon)** in the upper right of the Reports window to save the report.
2. Select the **Play button** to run the report. The report will be generated based on the selected timeframe and filters.

Report Types

This detailed guide provides a comprehensive overview of reporting capabilities in Nextiva Contact Center. By utilizing these reports effectively, supervisors can gain valuable insights into agent performance, queue efficiency, campaign success, and customer satisfaction.

- Agent
- Queue
- Outbound/Dialer
- Campaign
- Survey

XBert Tip:

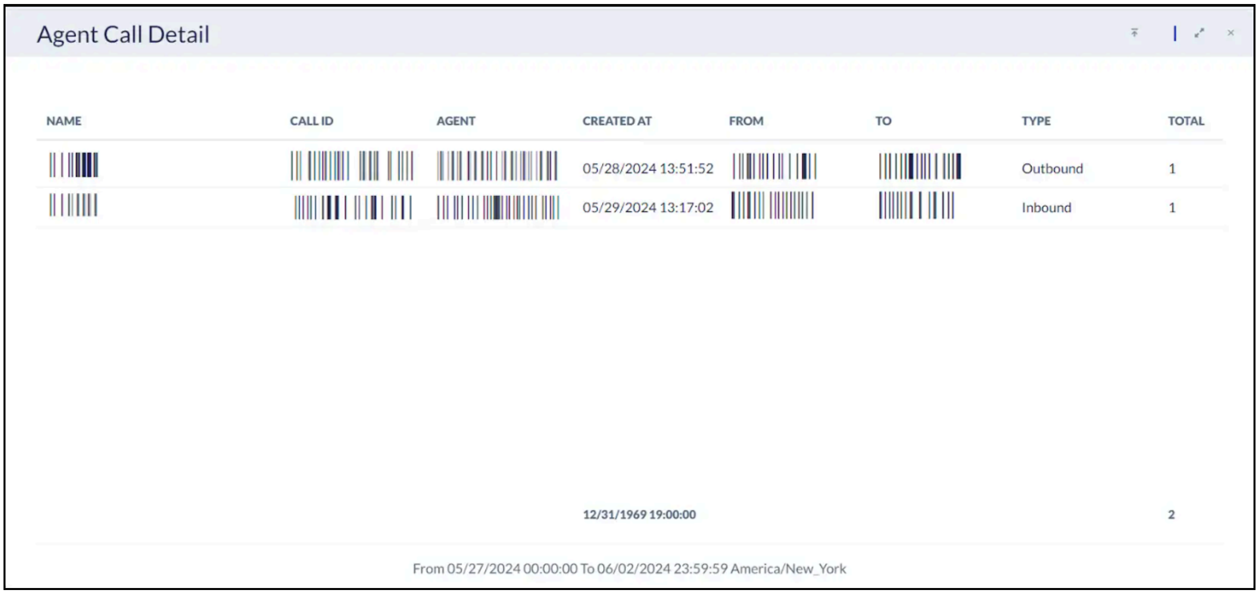
- Refer to the Nextiva Contact Center glossary for definitions of specific terms and acronyms used in the reports.
- Watch the Nextiva Contact Center Reports webinar for information on real-time reporting and monitoring.

Agent Reports

- **Agent Call Detail:** Provides a detailed log of all calls made or received by an agent, including call ID, agent name, time and date, and caller/callee information.
- **Agent Disposition:** Tracks work item count, average handle time, and the distribution of work items by disposition type.
- **Agent Login:** Monitors agent login and logout times, allowing you to track total logged-in time over a specific period.
- **Agent Occupancy:** Shows how agents spend their time across various statuses (Available, Working, Busy, etc.).
- **Agent Status:** Reports the amount of time agents spend in each status state (Available, Working, No Answer, etc.).

Agent Call Detail Report

Keep track of exact customer interaction details with the Agent Call Detail Report. With this report, you can verify exact customer details whenever they interact with your agents. You can confirm workitem time stamps and caller ID details.


Agent Call Detail

NAME	CALL ID	AGENT	CREATED AT	FROM	TO	TYPE	TOTAL
			05/28/2024 13:51:52			Outbound	1
			05/29/2024 13:17:02			Inbound	1
			12/31/1969 19:00:00				2

From 05/27/2024 00:00:00 To 06/02/2024 23:59:59 America/New_York

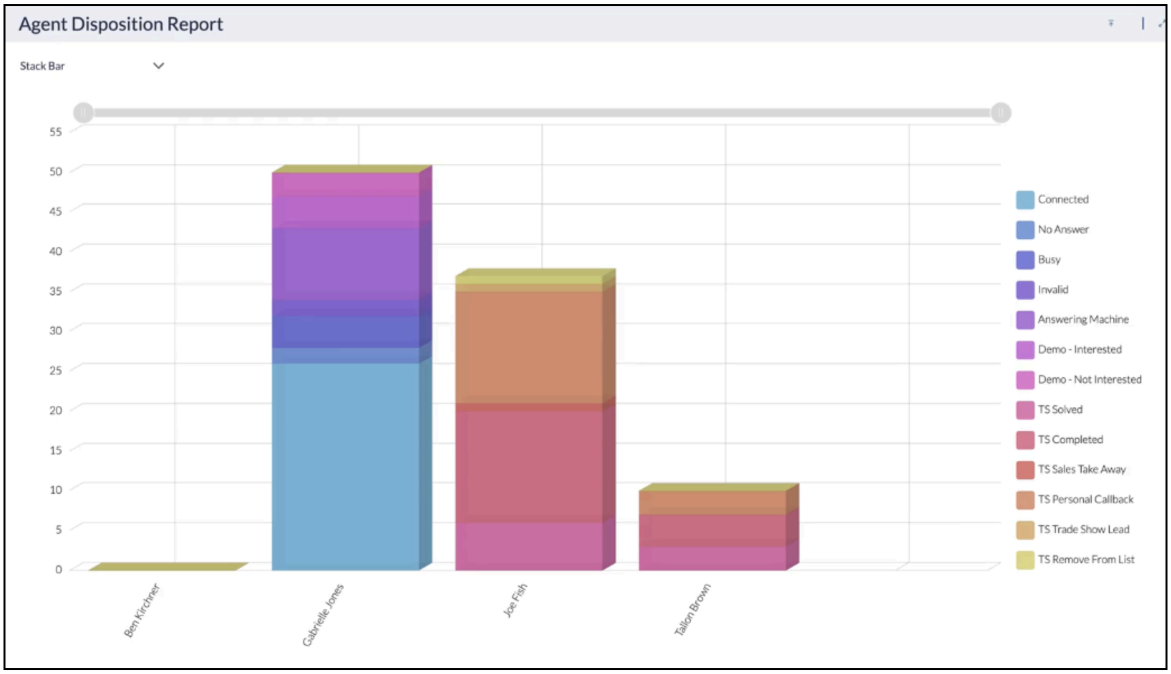
Create an Agent Call Detail Report

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 Call Detail - Weekly Summary").
5. Provide a detailed **description** of the report's purpose.
6. From the “Type” dropdown menu, select **Agent Disposition.**
7. Enter the desired **filename** for the exported report (e.g., "Agent_Call_Detail_Report").
8. 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.

9. Select the appropriate **timezone** for the report data.
10. Toggle **Supervised Agents** to ON.
11. Select the File icon to select specific **agents** to include in the report.
12. Check the boxes next to the desired agents and select **OK**.
13. Toggle **Supervised Queues** to ON.
14. Select the File icon to select specific **queues** to include in the report.
15. Check the boxes next to the desired queues and select **OK**.
16. Toggle **Supervised Campaigns** to ON.
17. Select the File icon to select specific **campaigns** to include in the report.
18. Check the boxes next to the desired campaigns and select **OK**.
19. Open the selector for "**Run Report As**" and select your name.
20. If viewing workitems that **ONLY** take place during your business hours, open the "**Time**" selector and choose your business hours schedule.
21. For "**Export Format**", choose CSV.
22. From the "**Email Account**" selector, choose your email address.
23. For "**Email recipients**", add the addresses to whom you want to send the report.
24. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
25. Select the **Generate Report** button to create the report.

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.

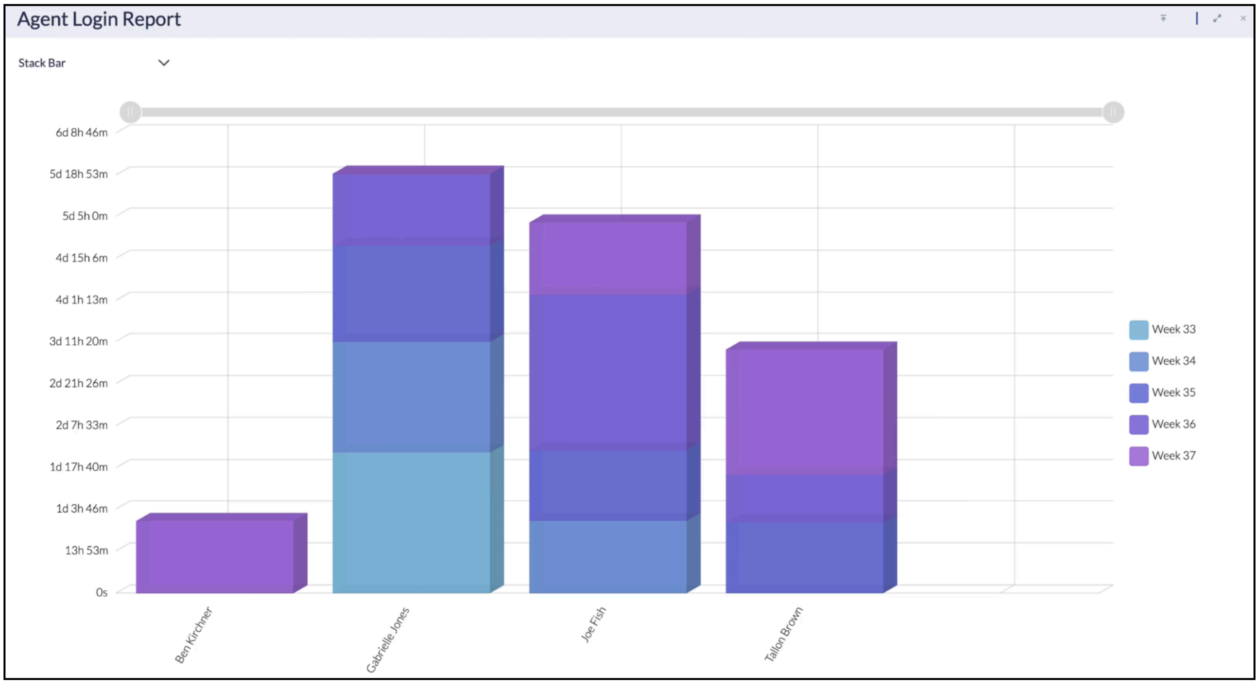
Leverage the power of Agent Disposition Reports to make data-driven decisions, improve agent effectiveness, and enhance the overall customer experience.

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 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. 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:

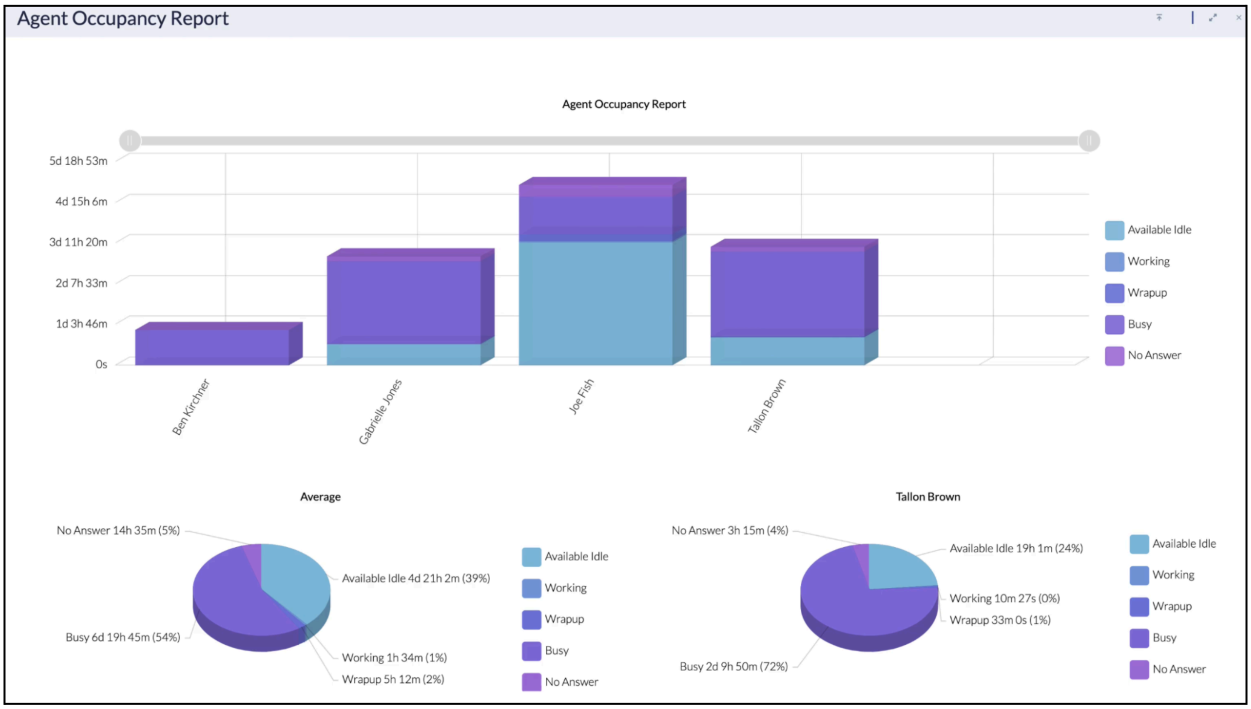
- Monitor agent availability: Quickly see which agents are logged in and available to handle customer interactions.
- Track login trends: Identify patterns in agent login activity, such as peak login times or periods of low activity.
- Analyze agent activity: Understand how much time agents spend logged 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.

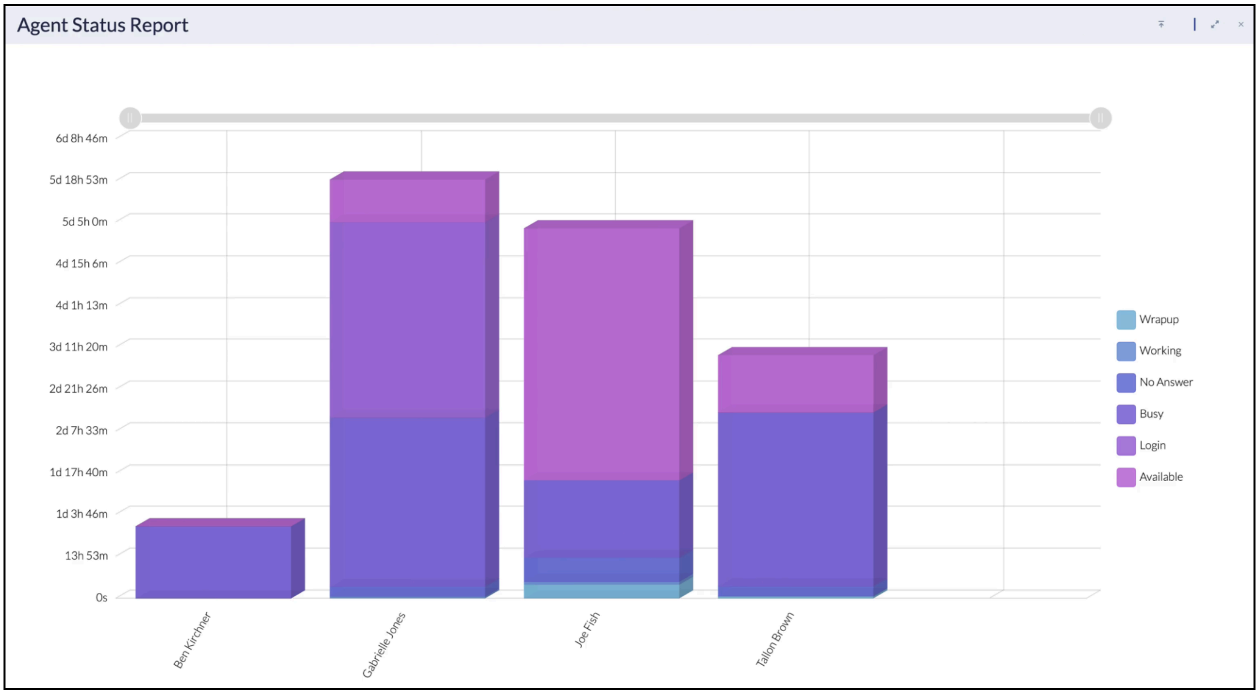
By leveraging the data provided in Agent Occupancy Reports, you can make informed decisions to optimize your contact center operations, improve agent performance, and enhance customer satisfaction.

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 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.

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

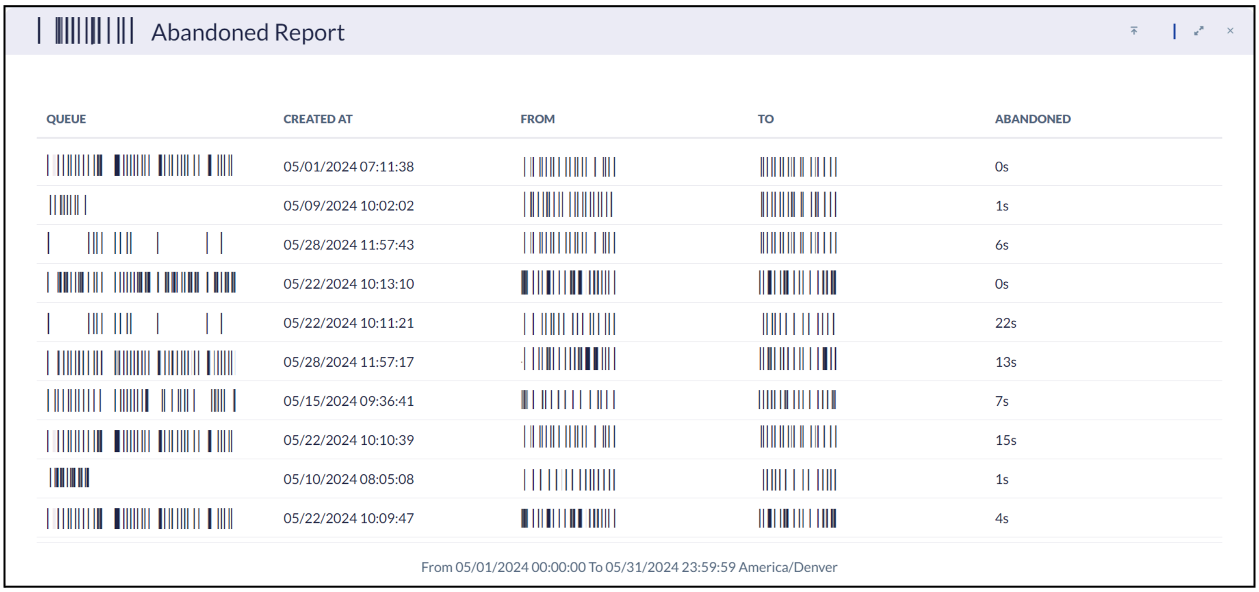
1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Agent Status Report - Daily Summary"). Optionally, add **translations** 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.

Queue Reports

- **Abandon Detail:** Provides details about abandoned calls from a specific queue, including the time of abandonment.
- **Queue Interval:** Displays the number of answered and abandoned work items in specific time intervals (e.g., 15, 30, or 60 minutes).
- **Queue SLA:** Measures queue performance based on service level agreements (SLAs), showing the percentage of calls answered within the defined threshold.

Abandon Detail Reports

Obtain a better insight on customer journeys into your business with the Abandon Detail Reports. These reports provide timed instances when customers leave a queue on their own (or abandon their call) due to long wait times. This is a great tool to assist in reaching out to missed customer contacts.



[redacted] Abandoned Report

QUEUE	CREATED AT	FROM	TO	ABANDONED
[redacted]	05/01/2024 07:11:38	[redacted]	[redacted]	0s
[redacted]	05/09/2024 10:02:02	[redacted]	[redacted]	1s
[redacted]	05/28/2024 11:57:43	[redacted]	[redacted]	6s
[redacted]	05/22/2024 10:13:10	[redacted]	[redacted]	0s
[redacted]	05/22/2024 10:11:21	[redacted]	[redacted]	22s
[redacted]	05/28/2024 11:57:17	[redacted]	[redacted]	13s
[redacted]	05/15/2024 09:36:41	[redacted]	[redacted]	7s
[redacted]	05/22/2024 10:10:39	[redacted]	[redacted]	15s
[redacted]	05/10/2024 08:05:08	[redacted]	[redacted]	1s
[redacted]	05/22/2024 10:09:47	[redacted]	[redacted]	4s

From 05/01/2024 00:00:00 To 05/31/2024 23:59:59 America/Denver

Don't let abandoned calls turn into lost customers. Abandon Detail Reports provide valuable insights into customer behavior, allowing you to:

- **Identify Pain Points:** Understand when and why customers abandon queues, highlighting areas where wait times exceed acceptable thresholds.
- **Recover Lost Opportunities:** Proactively reach out to customers who abandoned their calls, demonstrating your commitment to their needs.
- **Personalize Follow-Up:** Use the detailed information provided to tailor your outreach and address specific customer concerns.
- **Improve Customer Experience:** Analyze abandonment trends to identify and address root causes of customer frustration.
- **Boost Customer Loyalty:** Turn potentially negative experiences into positive ones by showing customers you value their time and business.

With Abandon Detail Reports, you can transform abandoned calls into opportunities to strengthen customer relationships and build loyalty.

Create an Abandon Detail 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., "Abandon Detail - Weekly").
5. Provide a detailed **description** of the report's purpose.
6. From the dropdown menu, select **Abandon Detail.**
7. Enter the desired **filename** for the exported report (e.g., "Abandon_Detail_Report").
8. 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.
9. Select the appropriate **timezone** for the report data.
10. Toggle **Supervised Queues** to ON
11. Select the File icon to select specific **queues** to include in the report.
12. Open the selector for "Run Report As" and select your name.
13. If viewing workitems that **ONLY** take place during your business hours, open the "Time" selector and choose your business hours schedule.
14. For "Export Format", choose CSV.
15. From the "Email Account" selector, choose your email address.
16. For "Email recipients", add the addresses to whom you want to send the report.
17. Once you have configured all the settings, select the **Save** (floppy disk) icon to save the report.
18. 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.

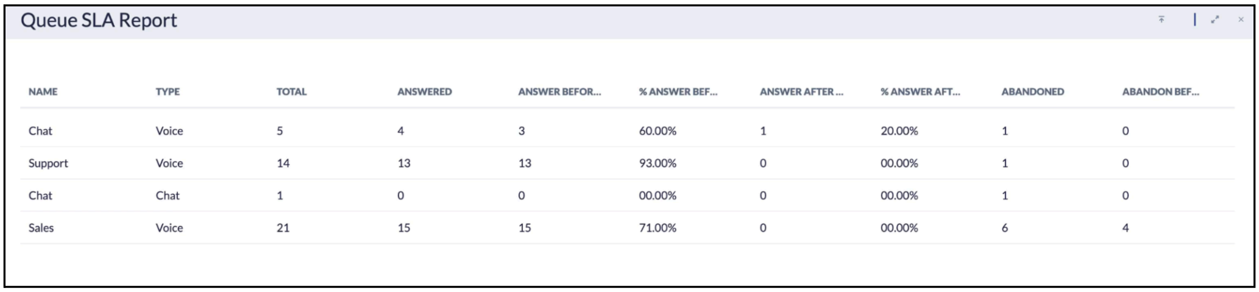
By leveraging the detailed information provided in Queue Interval Reports, you can gain a comprehensive understanding of your queue performance, identify areas for improvement, and make data-driven decisions to enhance your contact center efficiency.

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 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.

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.

Outbound/Dialer Reports

- **Failed Outbound Leads:** Lists outbound leads that were not successfully contacted due to issues like bad numbers or errors.
- **Outbound Detail Disposition:** Provides an itemized list of outbound work items and their corresponding dispositions.
- **Outbound List Disposition:** Summarizes all dispositions for each selected outbound list.

Failed Outbound Leads Reports

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 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 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.

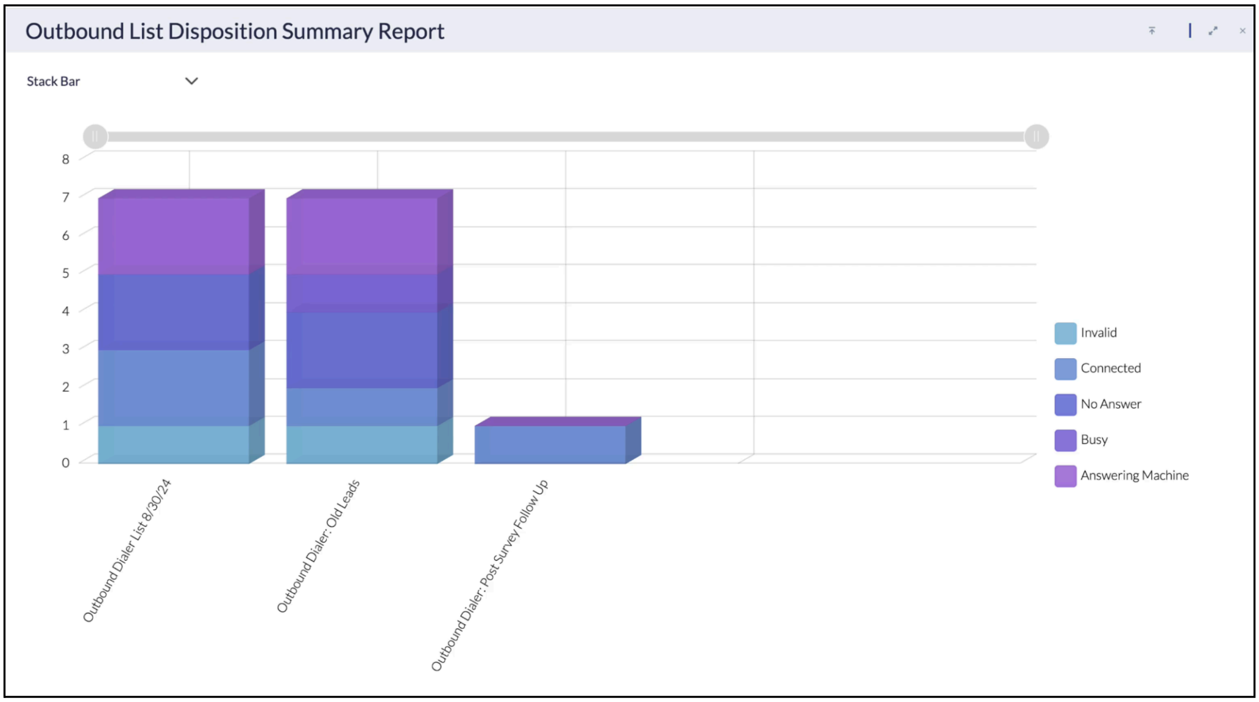
By leveraging the detailed information provided in these reports, you can gain a deeper understanding of your outbound calling performance, identify areas for improvement, and make data-driven decisions to optimize your campaigns.

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

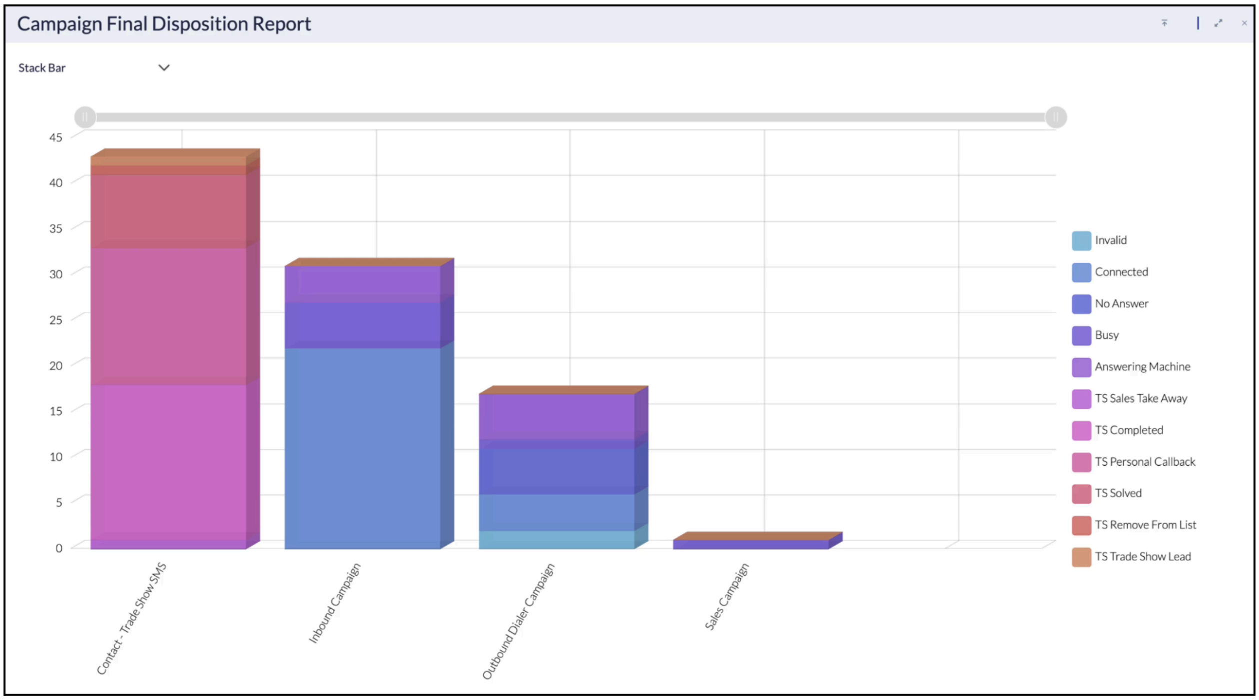
1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Outbound List Dispositions"). Optionally, add **translations** by selecting 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.

Campaign Reports

- **Campaign Final Disposition:** Shows the number of work items assigned to each disposition type within a campaign.
- **Campaign Queue Interval:** Calculates the total number of work items handled by queues for selected campaigns in specific time intervals.
- **Campaign Queue Summary:** Provides a summary of queue data for selected campaigns, including total work items, answered, abandoned, and other metrics.
- **Campaign Volume Summary:** Provides a count of different work item types involved in a particular campaign.

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.

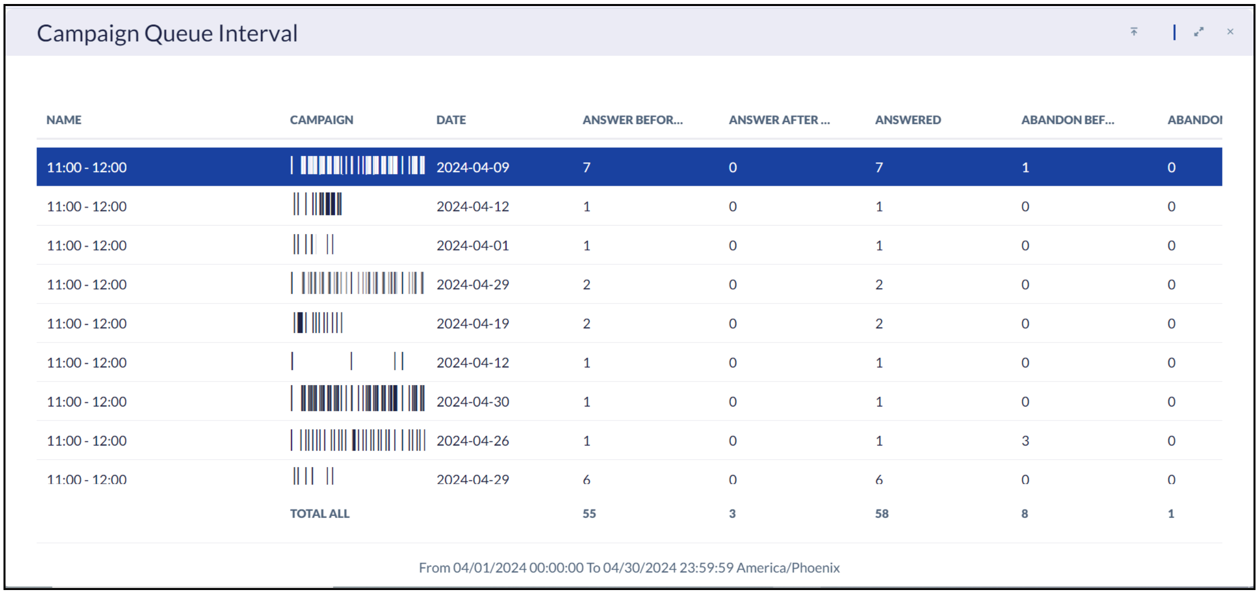
This report empowers you to make data-driven decisions to optimize your campaigns, improve agent performance, and enhance the overall success of your contact center operations.

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 Interval Reports

Monitor and analyze the peak handle times for workitems and efficiency of your agents with Campaign Queue Interval Reports. These reports help you to compare time intervals of incoming workitems in different queues allowing you to adjust staffing needs for anticipated volume.


Campaign Queue Interval

NAME	CAMPAIGN	DATE	ANSWER BEFOR...	ANSWER AFTER ...	ANSWERED	ABANDON BEF...	ABANDOI
11:00 - 12:00	[redacted]	2024-04-09	7	0	7	1	0
11:00 - 12:00	[redacted]	2024-04-12	1	0	1	0	0
11:00 - 12:00	[redacted]	2024-04-01	1	0	1	0	0
11:00 - 12:00	[redacted]	2024-04-29	2	0	2	0	0
11:00 - 12:00	[redacted]	2024-04-19	2	0	2	0	0
11:00 - 12:00	[redacted]	2024-04-12	1	0	1	0	0
11:00 - 12:00	[redacted]	2024-04-30	1	0	1	0	0
11:00 - 12:00	[redacted]	2024-04-26	1	0	1	3	0
11:00 - 12:00	[redacted]	2024-04-29	6	0	6	0	0
	TOTAL ALL		55	3	58	8	1

From 04/01/2024 00:00:00 To 04/30/2024 23:59:59 America/Phoenix

Gain a deeper understanding of your queue dynamics with Campaign Queue Interval Reports. By analyzing peak handle times and agent efficiency across different time intervals, you can:

- **Forecast Staffing Needs:** Anticipate fluctuations in incoming work items and adjust staffing levels accordingly to maintain optimal service levels.
- **Identify Peak Hours:** Pinpoint periods of high volume to ensure adequate agent availability during critical times.
- **Optimize Agent Scheduling:** Align agent schedules with peak demand to minimize wait times and maximize efficiency.
- **Improve Resource Allocation:** Allocate resources effectively based on real-time queue behavior and historical trends.
- **Enhance Productivity:** Identify and address potential bottlenecks to streamline workflow and boost agent productivity.

Campaign Queue Interval Reports provide the granular insights you need to fine-tune staffing strategies, optimize resource allocation, and enhance overall operational efficiency.

Create a Campaign 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., "Campaign Queue Interval"). Optionally, add **translations** by selecting the globe icon.
5. Provide a detailed **description** of the report's purpose.
6. From the dropdown menu, select **Campaign Queue Interval**.
7. From **Time Intervals**, choose from 15, 30, or 60 minutes.
8. Enter the desired **filename** for the exported report (e.g., "Campaign_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 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

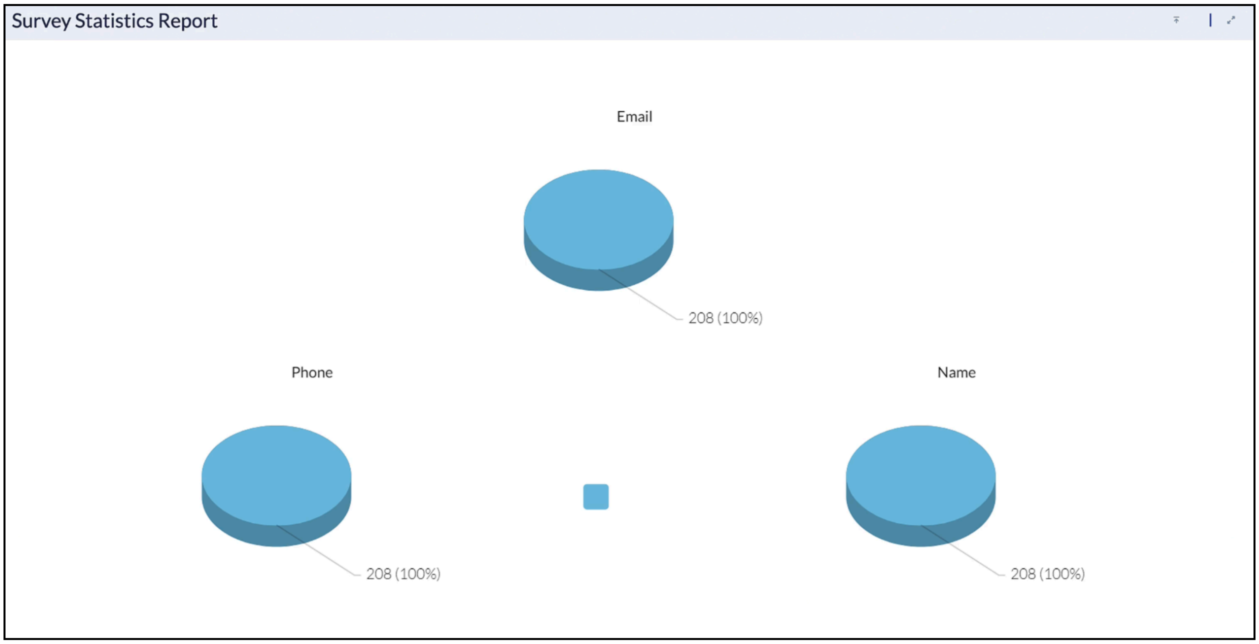
1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Campaign Volume Summary"). Optionally, add **translations** by selecting 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 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 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.

Survey Reports

- **Survey Statistics:** Offers a graphical representation of survey elements and the number of responses for each element, along with breakdowns of customer responses.
- **Survey Workitems:** Provides detailed information about the work item associated with a survey and the corresponding survey responses.

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.

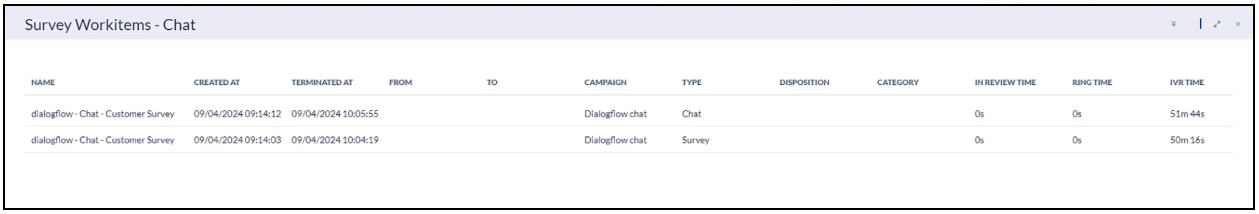
By leveraging the insights provided in Survey Statistics Reports, you can gain a deeper understanding of your customers, improve your products and services, and build stronger customer relationships.

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

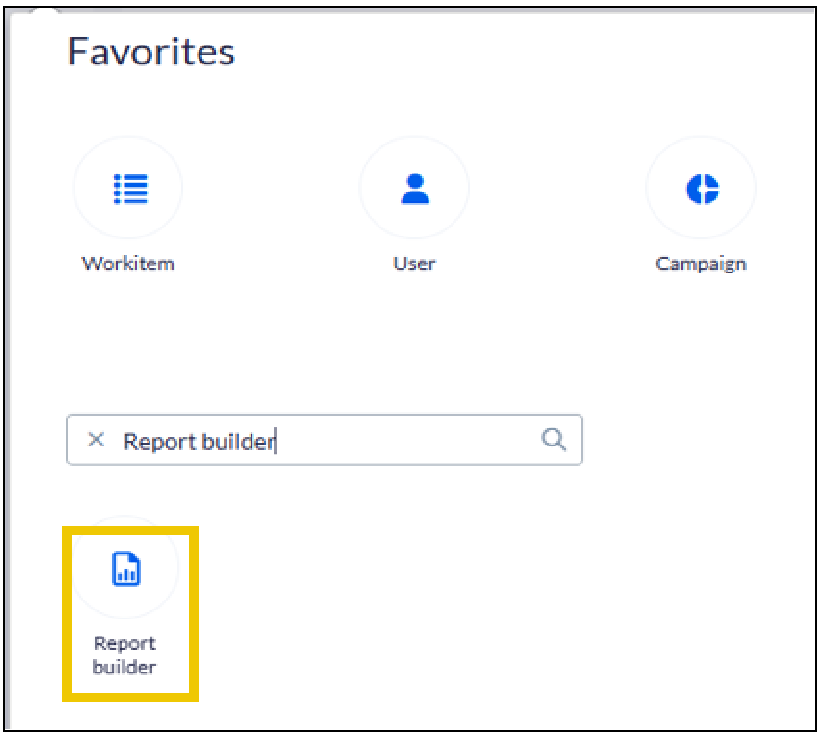
1. Go to the **Options Menu** and search for "Reports."
2. Select the **Reports** icon.
3. Select the **Add** (+) button to the right of the Search field to open the report creation form.
4. Enter a **name** for your report (e.g., "Survey Workitems Report"). Optionally, add **translations** by selecting 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.

Select the **Generate Report** button to create the report.

Custom Reports

Accessing Report Builder

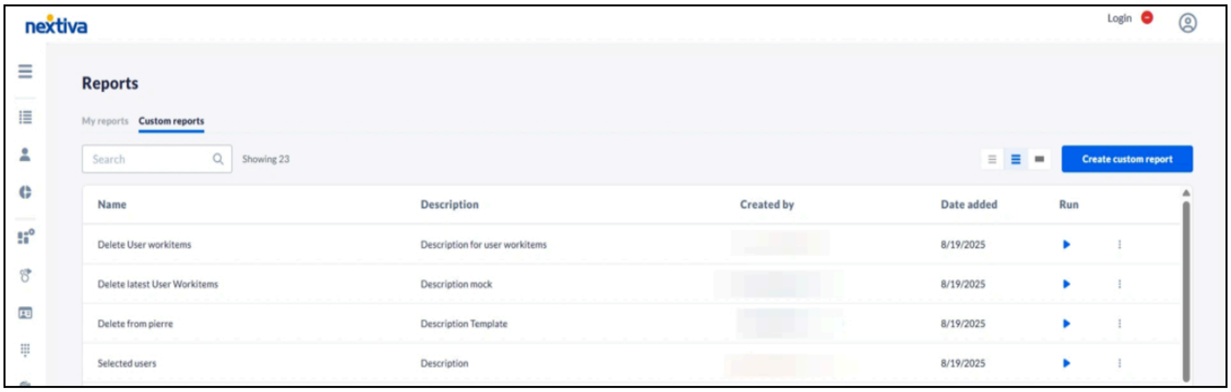
1. Select the **Options icon** in the top left corner of the interface.
2. In the filter section, search for **Report builder**.
3. Select the **Report Builder icon**.



Adding Reports to Favorites

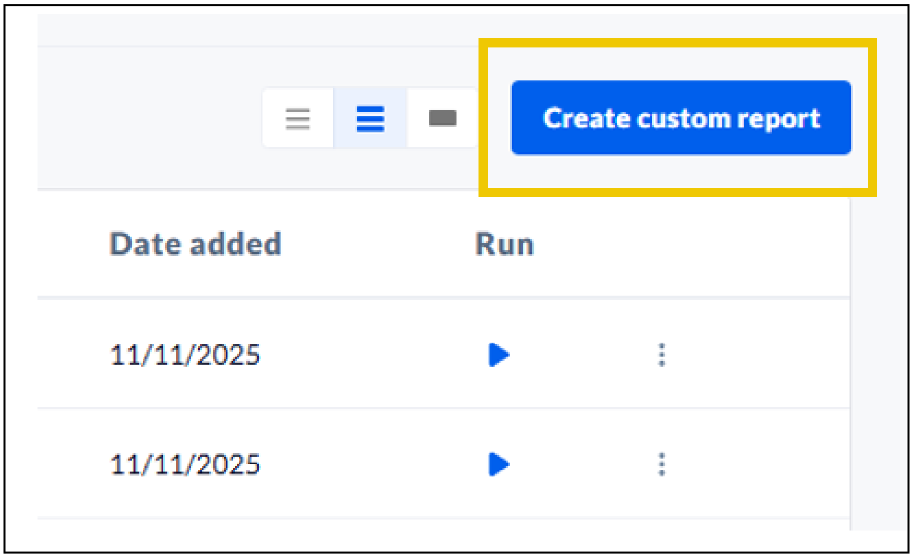
1. To add Reports to your favorites, drag the **Report Builder icon** to the Favorites section. This places the icon in the toolbar at the top for quick access.

2. You'll immediately see a list of saved custom reports

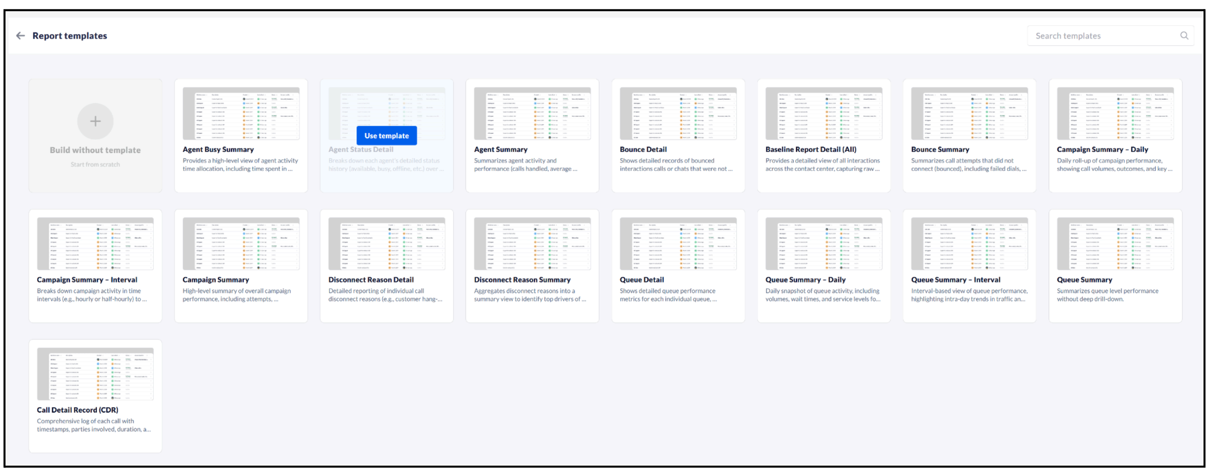


Creating a New Report

1. To create a new report, select the ‘**Create Custom Report**’ button on the right-hand side.

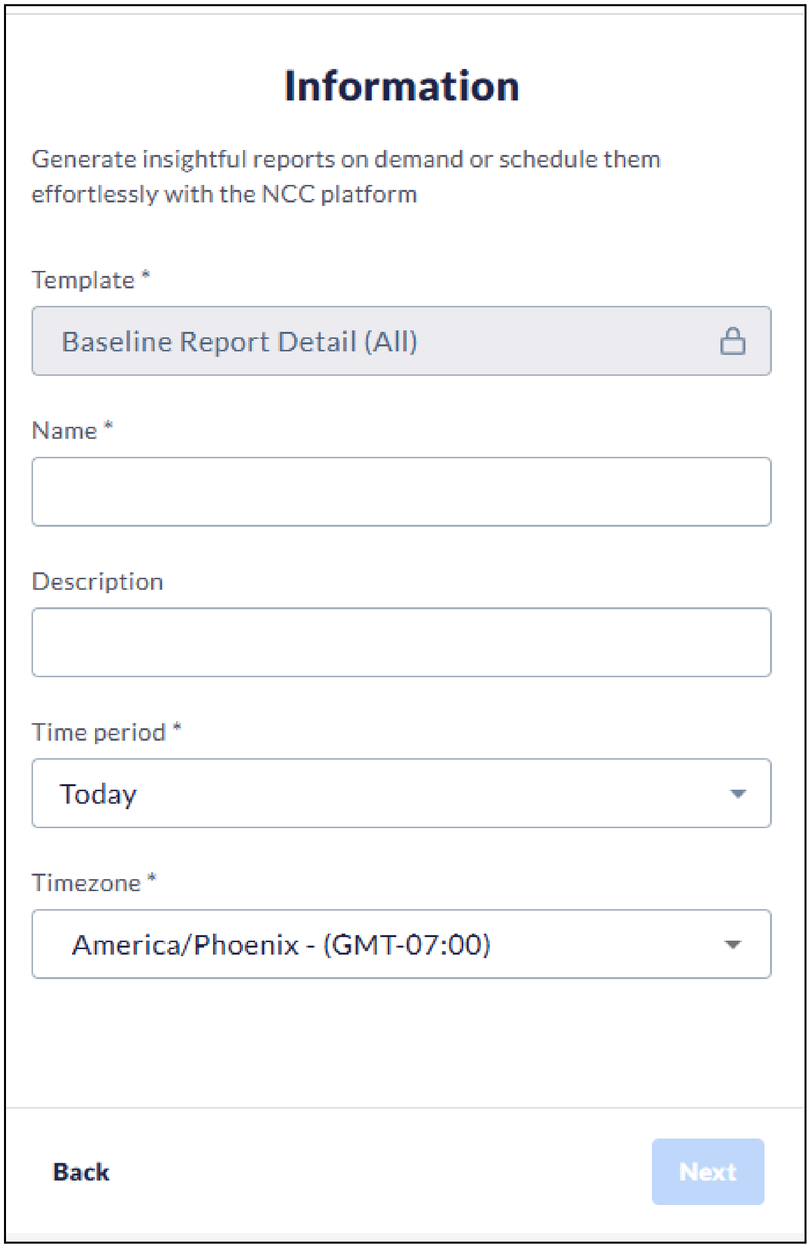


2. Choose from the list of pre-built templates.



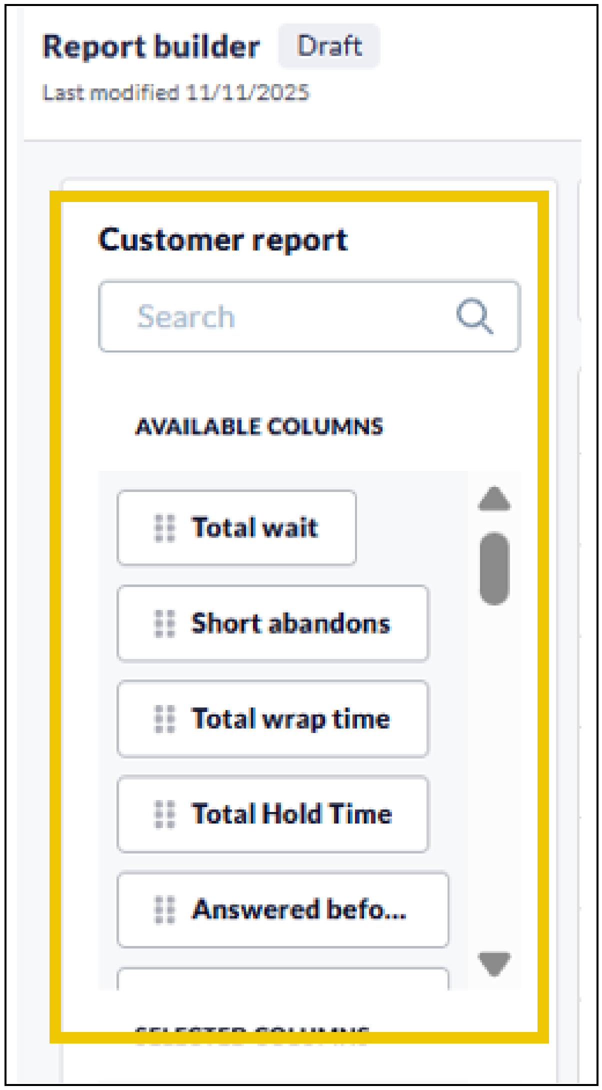
3. Fill in the necessary fields.

4. Select **Next**.



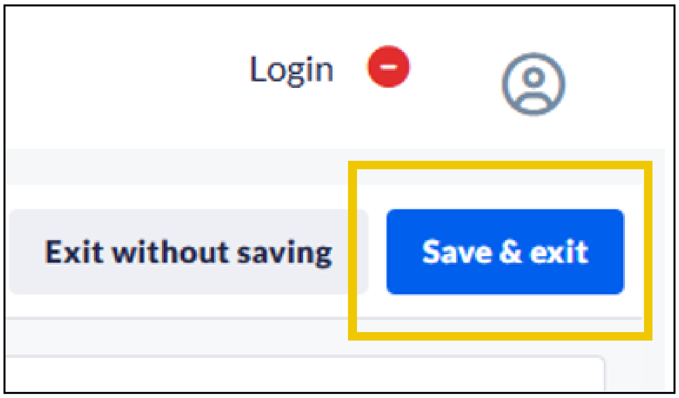
5. Drag and drop the statistics from the left margin into the center to start viewing the data.

XBert Tip: If the data does not appear right away, check the date range button and select a new range of time.



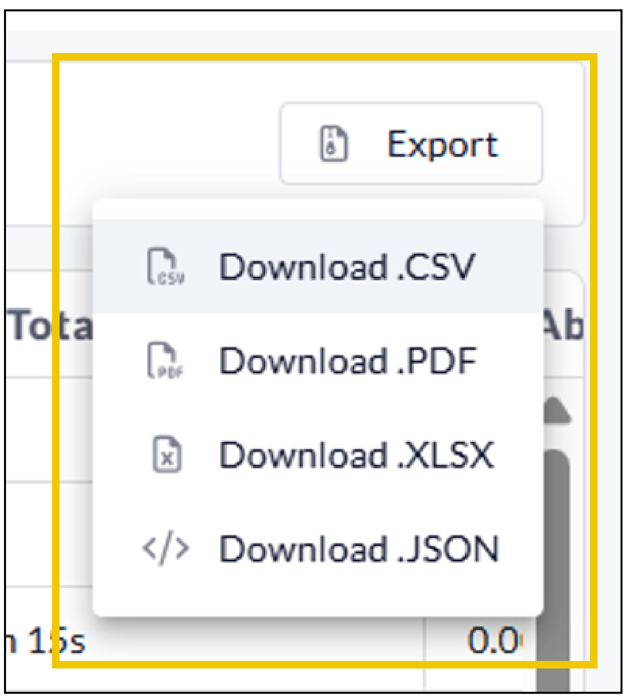
Saving the Report

To save the report, select **Save and Exit** in the top-right corner.



Exporting the Report

1. To export a custom report, select the **Export** button on the right-hand side.
2. Select the desired file format.



Custom Report Types

Agent Busy Summary Report

The Agent Busy Summary report provides a high-level overview of agent availability, showing how much time each agent spent in various busy states, during a selected period. The Agent Busy Summary report has the following columns:

- Agent Name – Name of the agent.
- Status Name - Agent's status type (Busy, Break, Etc).
- Duration Time - Total time spent in that status.
- Average Duration - Average length of each status occurrence.
- Count - Number of times the status was entered.

Agent Status Detail Report

The Agent Status Detailed report displays a detailed timeline of each agent's status changes throughout the day; such as available, on call, or on break, to monitor productivity and adherence. The Agent Status Detail report has the following columns:

- User ID – Unique identifier of the agent.
- Agent Name – Display name of the agent.
- Status name – The specific status label (Lunch, Meeting, Etc).
- Duration time – Total time spent in this status.
- Created at – Start timestamp of the status.
- Terminated at – End timestamp of the status.

Agent Summary Report

The Agent Summary report summarizes key performance metrics for each agent, including call volume, handle time, and average talk time, helping evaluate overall efficiency and performance trends. The Agent Summary Report has the following columns:

- Agent name – Name of the agent.
- Workitem count – Number of interactions handled.
- Average handle time – Mean interaction handling time.
- Inbound calls – Total inbound calls taken.
- Inbound average handle time – Average handle time for inbound calls.
- Outbound calls – Total outbound calls placed.
- Outbound average handle time – Average handle time for outbound calls.
- Progressive calls – Count of progressive dialer calls.
- Progressive average handle time – Average handle time for progressive calls.
- Chats – Total chat interactions handled.
- Chat average handle time – Average chat handling time.
- Other calls – Count of other non-standard calls.
- Other average handle time – Average handle time for other calls.
- Total talk time – Sum of all talking time.
- Total handle time – Sum of all handling time.
- Bounces – Interactions bounced by agent.
- Rejected – Interactions rejected by agent.
- Total idle time – Idle (waiting + available) time.
- Total unavailable – Time agent was unavailable.
- Prod time – Productive time (talk + wrap + handle).
- Total staffed time – Entire time logged in.
- Occupancy – % of staffed time spent working.
- % Talk time – % of staffed time spent talking.

Bounce Detail Report

The Bounce Detail report lists calls that were offered to agents but not answered or were manually rejected ("bounced"), helping identify missed opportunities and potential staffing or routing issues. The Bounce Detail report has the following columns:

- Workitem ID – Unique identifier for the interaction.
- Created at – Time the bounce occurred.
- Type – Type of bounced interaction.
- User ID – Agent ID tied to the bounce.
- Agent Name – Name of the agent tied to the bounce.

Baseline Detail Report (All)

The Baseline Detail report (All) provides a detailed view of all interactions across the contact center, capturing raw activity without filtering by campaign, queue, or user. The Baseline Detail report (All) has the following columns:

- Date – Date of interaction.
- User duration – Duration tied to agent work.
- Wrapup time count – Number of wrap-up instances.
- Seq number – Sequence identifier for record.
- Talk time – Time spent in conversation.
- Hold time count – Number of holds.
- End date – End time of interaction.
- User transfer – Transfers initiated by agent.
- Talk time count – Count of talk segments.
- Channel type – Channel (call, chat, SMS, etc.).
- Type – Type of workitem.
- To address – Destination address/number.
- Answered before SLA – Mark if answered within SLA.
- Queue exit time – Time left queue.
- Real abandon – Abandon after joining queue.
- Workitem Id – Unique ID of the workitem.
- Abandoned after SLA – Abandons beyond SLA.
- Short abandons – Very quick abandons.
- Abandoned before SLA – Abandons before SLA expired.

- Queue exit result – Outcome after queue exit.
- Queue Transfer – Transfer from queue to another.
- From address – Origin address/number.
- Abandoned – Total abandoned count.
- Workflow transfers – Transfers via workflow.
- Queue duration abandoned – Time in queue before abandon.
- Handle time – Total handling time.
- Total transfers – Total number of transfers.
- Answered – Answered flag.
- SLA – SLA status for the item.
- Agent name – Assigned agent name.
- Offer time count – Count of offers.
- Hold time – Total hold time.
- Offer time – Time of offer.
- Disposition – Final call disposition.
- Wrap up time – Time spent wrapping up.
- Disconnect reason – Reason for termination.
- Queue name – Name of queue.
- Half interval – Time bucket label.
- Queue duration – Total queue time.
- External Transfer – Whether transferred out.
- Queue duration answered – Queue time until answer.
- Enter queue time – Time interaction entered queue.
- Campaign – Campaign associated.
- State date – Start timestamp.
- Answered after SLA – Answered but SLA violated.

Bounce Summary Report

The Bounce Summary report summarizes call attempts that did not connect (bounce), including failed dials, short calls, or unreachable contacts. The Bounce Summary report has the following columns:

- Total – Total number of bounced items.
- Agent name – Name of agent.
- User ID – Agent identifier.

Campaign Summary – Daily Report

The Campaign Summary – Daily report is a daily roll-up of campaign performance, showing call volumes, outcomes, and key KPIs by campaign. The Campaign Summary – Daily report has the following columns:

- Date – Calendar day of metrics.
- Total wait – Total waiting time across interactions.
- Average handle time – Mean agent handle time.
- Short abandons – Count of quick abandons.
- Average talk time – Mean talk time.
- Total wrap time – Total wrap-up time.
- Total Hold Time – Total time customers spent on hold.
- Average wait – Average time customers waited.
- Answered before SLA – Count answered within SLA.
- External transfers – Calls transferred externally.
- Transfer rate – % of calls transferred.
- Abandoned after SLA – Calls abandoned beyond SLA.
- Total Talk Time – Combined talk duration.
- User transfers – Transfers made by users.
- Max hold time – Longest hold duration.
- Average hold time – Mean hold time.
- Abandoned before SLA – Calls abandoned before SLA.
- Max wrap time – Longest wrap-up time.
- Max abandon time – Longest abandon wait time.
- Total handle – Total handle duration.
- Queue transfers – Calls transferred between queues.
- Total workitems – Count of workitems.
- Abandoned – Total abandoned calls.
- Average abandon time – Mean abandon wait time.
- Max talk time – Longest talk duration.
- Answered – Total answered interactions.
- Max handle – Longest handle time.
- Total Transfers – Total transfers.
- Max wait – Longest wait duration.
- Workflow transfers – Transfers via workflows.
- Service level – SLA compliance % (answered within threshold).
- Average wrapup time – Mean wrap-up duration.
- Abandon Rate – % of calls abandoned.
- Distinct workitems – Unique interaction IDs.
- Campaign – Associated campaign.
- Answered after SLA – Answered interactions past SLA.

Campaign Summary – Interval Report

The Campaign Summary – Interval report breaks down campaign activity in time intervals (e.g., hourly or half-hourly) to monitor performance trends throughout the day. The Campaign Summary – Interval report has the following columns:

- Date – Interval date/time.
- Total wait – Total waiting time across interactions.
- Average handle time – Mean agent handle time.
- Short abandons – Count of quick abandons.
- Average talk time – Mean talk time.
- Total wrap time – Total wrap-up time.
- Total Hold Time – Total time customers spent on hold.
- Average wait – Average time customers waited.
- Answered before SLA – Count answered within SLA.
- External transfers – Calls transferred externally.
- Transfer rate – % of calls transferred.
- Abandoned after SLA – Calls abandoned beyond SLA.
- Total Talk Time – Combined talk duration.
- User transfers – Transfers made by users.
- Max hold time – Longest hold duration.
- Average hold time – Mean hold time.
- Abandoned before SLA – Calls abandoned before SLA.
- Max wrap time – Longest wrap-up time.
- Max abandon time – Longest abandon wait time.
- Total handle – Total handle duration.
- Queue transfers – Calls transferred between queues.
- Total workitems – Count of workitems.
- Abandoned – Total abandoned calls.
- Average abandon time – Mean abandon wait time.
- Max talk time – Longest talk duration.
- Answered – Total answered interactions.
- Max handle – Longest handle time.
- Total Transfers – Total transfers.
- Max wait – Longest wait duration.
- Workflow transfers – Transfers via workflows.
- Service level – SLA compliance % (answered within threshold).
- Average wrapup time – Mean wrap-up duration.

- Abandon Rate – % of calls abandoned.
- Distinct workitems – Unique interaction IDs.
- Campaign – Associated campaign.
- Answered after SLA – Answered interactions past SLA.
- Half interval – Time bucket (e.g., 09:00–09:30).

Campaign Summary Report

The Campaign Summary report is a high-level summary of overall campaign performance, including attempts, connects, and outcomes. The Campaign Summary report has the following columns:

- Total wait – Total waiting time across interactions.
- Average handle time – Mean agent handle time.
- Short abandons – Count of quick abandons.
- Average talk time – Mean talk time.
- Total wrap time – Total wrap-up time.
- Total Hold Time – Total time customers spent on hold.
- Average wait – Average time customers waited.
- Answered before SLA – Count answered within SLA.
- External transfers – Calls transferred externally.
- Transfer rate – % of calls transferred.
- Abandoned after SLA – Calls abandoned beyond SLA.
- Total Talk Time – Combined talk duration.
- User transfers – Transfers made by users.
- Max hold time – Longest hold duration.
- Average hold time – Mean hold time.
- Abandoned before SLA – Calls abandoned before SLA.
- Max wrap time – Longest wrap-up time.
- Max abandon time – Longest abandon wait time.
- Total handle – Total handle duration.
- Queue transfers – Calls transferred between queues.
- Total workitems – Count of workitems.
- Abandoned – Total abandoned calls.
- Average abandon time – Mean abandon wait time.
- Max talk time – Longest talk duration.
- Answered – Total answered interactions.
- Max handle – Longest handle time.
- Total Transfers – Total transfers.
- Max wait – Longest wait duration.

- Workflow transfers – Transfers via workflows.
- Service level – SLA compliance % (answered within threshold).
- Average wrapup time – Mean wrap-up duration.
- Abandon Rate – % of calls abandoned.
- Distinct workitems – Unique interaction IDs.
- Campaign – Associated campaign.
- Answered after SLA – Answered interactions past SLA.

Disconnect Reason Detail Report

The Disconnect Reason Detail report provides detailed reporting of individual call disconnect reasons (e.g. customer hang up, agent end, network drop). The Disconnect Reason Detail report has the following columns:

- Workitem Id – Interaction identifier.
- Date – Date of disconnect.
- Agent name – Agent involved.
- User ID – Agent ID.
- Termination reason – Disconnect reason code.

Disconnect Reason Summary Report

The Disconnect Reason Summary report aggregates disconnect reasons into a summary view to identify top drivers of call terminations. The Disconnect Reason Summary report has the following columns:

- Customer on hold – Calls ended by customer on hold.
- Customer terminated – Calls ended by customer.
- Total – Total disconnects.
- Agent hangup on hold – Calls ended by agent during hold.
- Agent on hold – Agent placed on hold events ended.
- Customer rate – % of disconnects by customer.
- Agent name – Agent name.
- User ID – Agent ID.
- Agent terminated – Calls ended by agent.
- Agent hangup – Count of agent hangups.
- Agent rate – % of disconnects by agent.

Queue Detail Report

The Queue Detail Report shows detailed queue performance metrics for each individual queue, The Queue Detail Report has the same columns as the Baseline Report Detail (All) report but for queue data.

Queue Summary - Daily Report

The Queue Summary - Daily report provides daily snapshots of queue activity, including volumes, wait times, and service levels for each queue. The Queue Summary - Daily report has the following columns:

- Date – Calendar day.
- Total Wait – Combined wait time.
- Average handle time – Mean handle time.
- Short abandons – Quick abandons.
- Average talk time – Mean talk time.
- Talk wrap time – Wrap time for answered calls.
- Total Hold Time – Total hold duration.
- Average wait – Mean wait time.
- Answered before SLA – Answered within SLA.
- External transfers – External transfers.
- Transfer rate – % transferred.
- Abandoned after SLA – Abandons beyond SLA.
- Total Talk Time – Total talk duration.
- User transfers – Transfers initiated by users.
- Max hold time – Longest hold.
- Average hold time – Mean hold.
- Abandoned before SLA – Abandons within SLA window.
- Max wrap time – Longest wrap.
- Max abandon time – Longest abandon wait.
- Total handle – Total handle duration.
- Queue transfers – Transfers between queues.
- Total workitems – Count of workitems.
- Abandoned – Total abandons.
- Average abandoned time – Mean abandon wait.
- Max talk time – Longest talk duration.
- Answered – Total answered.

- Max handle – Longest handle.
- Total Transfers – All transfers.
- Max wait – Longest wait.
- Workflow transfers – Workflow transfers.
- Service level – SLA compliance %.
- Average wrapup time – Mean wrap-up.
- Queue name – Name of queue.
- Abandon Rate – % of abandons.
- Distinct workitems – Unique workitems.
- Answered after SLA – Answered past SLA.

Queue Summary - Interval Report

The Queue Summary – Interval report is an interval-based view of queue performance, highlighting intra-day trends in traffic and agent handling.

The Queue Summary - Interval report has the following columns:

- Date – Calendar day.
- Total Wait – Combined wait time.
- Average handle time – Mean handle time.
- Short abandons – Quick abandons.
- Average talk time – Mean talk time.
- Talk wrap time – Wrap time for answered calls.
- Total Hold Time – Total hold duration.
- Average wait – Mean wait time.
- Answered before SLA – Answered within SLA.
- External transfers – External transfers.
- Transfer rate – % transferred.
- Abandoned after SLA – Abandons beyond SLA.
- Total Talk Time – Total talk duration.
- User transfers – Transfers initiated by users.
- Max hold time – Longest hold.
- Average hold time – Mean hold.
- Abandoned before SLA – Abandons within SLA window.
- Max wrap time – Longest wrap.
- Max abandon time – Longest abandon wait.
- Total handle – Total handle duration.
- Queue transfers – Transfers between queues.
- Total workitems – Count of workitems.

- Abandoned – Total abandons.
- Average abandoned time – Mean abandon wait.
- Max talk time – Longest talk duration.
- Answered – Total answered.
- Max handle – Longest handle.
- Total Transfers – All transfers.
- Max wait – Longest wait.
- Workflow transfers – Workflow transfers.
- Service level – SLA compliance %.
- Average wrapup time – Mean wrap-up.
- Queue name – Name of queue.
- Abandon Rate – % of abandons.
- Distinct workitems – Unique workitems.
- Answered after SLA – Answered past SLA.
- Half interval – Time bucket (e.g., 09:00–09:30).
- Answered Rate – % of calls answered vs. offered.

Queue Summary Report

The Queue Summary report summarizes queue level performance without deep drill-down. The Queue Summary report has the following columns:

- Date – Calendar day.
- Total Wait – Combined wait time.
- Average handle time – Mean handle time.
- Short abandons – Quick abandons.
- Average talk time – Mean talk time.
- Talk wrap time – Wrap time for answered calls.
- Total Hold Time – Total hold duration.
- Average wait – Mean wait time.
- Answered before SLA – Answered within SLA.
- External transfers – External transfers.
- Transfer rate – % transferred.
- Abandoned after SLA – Abandons beyond SLA.
- Total Talk Time – Total talk duration.
- User transfers – Transfers initiated by users.
- Max hold time – Longest hold.
- Average hold time – Mean hold.
- Abandoned before SLA – Abandons within SLA window.
- Max wrap time – Longest wrap.

- Max abandon time – Longest abandon wait.
- Total handle – Total handle duration.
- Queue transfers – Transfers between queues.
- Total workitems – Count of workitems.
- Abandoned – Total abandons.
- Average abandoned time – Mean abandon wait.
- Max talk time – Longest talk duration.
- Answered – Total answered.
- Max handle – Longest handle.
- Total Transfers – All transfers.
- Max wait – Longest wait.
- Workflow transfers – Workflow transfers.
- Service level – SLA compliance %.
- Average wrapup time – Mean wrap-up.
- Queue name – Name of queue.
- Abandon Rate – % of abandons.
- Distinct workitems – Unique workitems.
- Answered after SLA – Answered past SLA.
- Half interval – Time bucket (e.g., 09:00–09:30).
- Answered Rate – % of calls answered vs. offered.

Call Detail Record (CDR) Report

The Call Detail Record (CDR) report is a comprehensive log of each call with timestamps, parties involved, duration, and outcome for auditing and analysis.

The Call Detail Record (CDR) report has the following columns:

- Date – Calendar day.
- Total Wait – Combined wait time.
- Average handle time – Mean handle time.
- Short abandons – Quick abandons.
- Average talk time – Mean talk time.
- Talk wrap time – Wrap time for answered calls.
- Total Hold Time – Total hold duration.
- Average wait – Mean wait time.
- Answered before SLA – Answered within SLA.
- External transfers – External transfers.
- Transfer rate – % transferred.
- Abandoned after SLA – Abandons beyond SLA.
- Total Talk Time – Total talk duration.

- User transfers – Transfers initiated by users.
- Max hold time – Longest hold.
- Average hold time – Mean hold.
- Abandoned before SLA – Abandons within SLA window.
- Max wrap time – Longest wrap.
- Max abandon time – Longest abandon wait.
- Total handle – Total handle duration.
- Queue transfers – Transfers between queues.
- Total workitems – Count of workitems.
- Abandoned – Total abandons.
- Average abandoned time – Mean abandon wait.
- Max talk time – Longest talk duration.
- Answered – Total answered.
- Max handle – Longest handle.
- Total Transfers – All transfers.
- Max wait – Longest wait.
- Workflow transfers – Workflow transfers.
- Service level – SLA compliance %.
- Average wrapup time – Mean wrap-up.
- Queue name – Name of queue.
- Abandon Rate – % of abandons.
- Distinct workitems – Unique workitems.
- Answered after SLA – Answered past SLA.
- Half interval – Time bucket (e.g., 09:00–09:30).
- Answered Rate – % of calls answered vs. Offered.

Glossary

User Column Types

Name	The name of the user.
Workitem Type	The type of work item the user handled.
List	The list the user's work item was associated with.
Lead	The ID of the lead.
Extension	The internal extension number assigned to the user.
Skill	The skills related to the user.
Queue	The queues the agent is assigned to.
Login Time	The date and time that the user logged in.
Status	The current status of the user (Available, Busy, Lunch Break, etc.).
Status Action	A number associated with the status name.
Status Duration	The amount of time the user has been on the current status.
Status Time	The date and time that the current status started.
Supervised	An icon will display if the user is being monitored (a supervisor is currently listening, coaching, or has joined a work item).
Available	The cumulative time the user's status has been "Available" for the current day.
Available Percentage	The percentage of the user's day on "Available" status (Available Duration / Login Time).
Busy	The cumulative time the user's status has been "Busy" for the current day.
Busy Percentage	The percentage of the user's day on a "Busy" status (Busy Duration / Login Time).
No Answer	The cumulative time the user's status has been "No Answer" for the current day.
No Answer Percentage	The percentage of the user's day on "No Answer" status (No Answer Duration / Login Time).

Wrap Up	The total time the agent spent in wrap-up time.
Total Wrap Up Time	The amount of time the agent's work items spent in wrap-up.
Wrap Up Percentage	The percentage of the user's day on "Wrap Up" status (Wrap Up Duration / Login Time).
Working	The cumulative time the user's status has been "Working" for the current day.
Working Status Percentage	The percentage of the user's day on "Working" status (Working Duration / Login Time).
Failed Scorecards	The number of scorecards that failed.
Passed Scorecards	The number of scorecards that passed.
Transcription Usage	The number of transcription minutes used out of the total amount of transcription time available (Transcription Minutes / Transcription Time Available).
Campaign	Displays the current Predictive/Progressive/QB campaign the user is logged into.
Group Name	Displays the name of the group the user is currently part of when using Predictive/Progressive/QB.
Group Identifier	Displays the ID number of the group the user is part of when using Predictive/Progressive/QB.
High RTT (Round Trip Time)	The time it takes (in milliseconds) for a request to be sent to the Nextiva server and for the request to be noticed. There will be a red x if the RTT exceeds 1000 milliseconds. Otherwise, it will be a green check.
Low MOS (Mean Option Score)	A rating of an experience on a scale from 1 to 5. There will be a red x if the MOS is below 3.5. Otherwise, it will be a green check.
High Jitter	Jitter is audio delay or any breakup during a call. There will be a red x if the average jitter is more than 5. Otherwise, it will be a green check.
High Packet Loss	Packet loss occurs when bits of information are not carried over a network. There will be a red x if the packet loss is more than 5%. Otherwise, it will be a green check.
Voice Issues	The number of voice issues (jitter, packet loss, etc.) that have occurred on the current day for that user.

Active	Depending on the filter chosen (voice, SMS, email, etc.), the number of work items that the agent currently has.
Answered	Depending on the filter chosen (voice, SMS, email, etc.), the total number of work items answered by an agent for the current day.
Total No Answered	Depending on the filter chosen (voice, SMS, email, etc.), the total number of work items offered from the queue and not answered or rejected by an agent for the current day.
Total Transferred	Depending on the filter chosen (voice, SMS, email, etc.), the current day's total number of transferred work items by an agent.
AHT	Average Handle Time: The average amount of time agents were handling work items for the current day. (Talk Time + Wrap-Up Time of all Calls Taken / Number of Calls Taken)
MHT	Maximum Handle Time: The longest time an agent handled a work item for the current day.
Compliance	An alert to the supervisor that an agent is out of compliance.
Avg Talk Time	The average amount of time the user spent talking to a customer.
Avg Wrap Up Time	The average amount of time the agent's work items spent in wrap-up.
Avg Hold Time	The average amount of time that the customer was on hold for calls that went on hold.
Total Talk Time	The total amount of time the user was talking with a customer.
Total Hold Time	The total amount of time that all work items were on hold.