



SmartAgent User Guide

Supervisor Guide

Starting your **SmartAgent** Journey

Version
2.85

Date
14/05/24

Author
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Changes
MPC Timings





Introduction

The purpose of this guide is to provide you with an introduction to using SmartAgent for contact management as a Supervisor.

We recommend attending an Agent session or watching a video of the Agent training for your organisation so you can be clear on logging in etc to support your team.

There are different levels of access and depending on your role some of the settings on display in this guide may not have been enabled for your system or for your access level.

Your Project leaders will provide guidance on which features have been enabled for your organisation.

Pre-requisites for this training

To successfully complete this **Smartagent - Supervisor User guide** you will require the following:

1. Access to a workstation
2. Access to the internet
3. **Google Chrome or Microsoft Edge browser**
4. A suitable headset, preferably a USB one
5. Your SmartAgent username and Password or sign-in credentials
6. A mobile phone / external phone to use in simulating a call
7. Confirmed that at least 2 users have logged into the UAT Environment and are available for the training session at the scheduled time

Duration of this training

Whilst the first time we run through this training we would anticipate there being some additional questions around rollout and procedural changes, under normal conditions we would expect that this session would typically be run within **30 Minutes**.

Who Should attend this training?

This training is for anyone using SmartAgent who will have Supervisor access on the SmartAgent system. We recommend that they have attended an Agent Training session as well.





Agenda

Module 1 Managing Service levels in SmartAgent

- Queue Metrics
- Agent Metrics
- Changing routing profiles and Status of agents
- Wallboards

Module 2: Agent & Contact Support

- Live Monitoring
- Call Barging
- Hand Up
- User management
- Announcements
- Business Continuity
- Welcome Messaging
- Audio settings

Module 3: Historic data

- Call recordings and CTR data in SmartAgent
- Historic reports in Connect- Queues
- Historic reports in Connect –Agents

Module 4: Optional extras

- Queued tasks
- QA – using a Contact Evaluation form





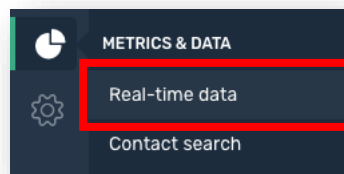
Module 1: Managing Service levels in SmartAgent

By the end of this module, you will be able to:

- Understand Queue real-time metrics
- Understand Agent real-time metrics
- Change active agents routing profile and status
- Wallboards

Queue Real-time metrics

Real-time queue data can be accessed by clicking the Metrics & Data icon in the left-hand menu and selecting Real-time data.



At the top of the page you will see a list of all queues.

Queues														
QUEUE ^	ONLINE	AVAILABLE	ON-CALL	IN QUEUE	OLDEST TIME	NR	ACW	ERROR	QUEUED	HANDLED	ABANDONED	SCHEDULED	AHT	SLA
Basic inbound	0	0	0	0	00:00	0	0	0	0	0	0	0	00:00	0%
VIP Priority	2	1	0	0	00:00	1	0	0	0	0	0	0	00:00	0%
Special Team 1	2	1	0	0	00:00	1	0	0	0	0	0	0	00:00	0%
Special Team 2	2	1	0	0	00:00	1	0	0	0	0	0	0	00:00	0%
Basic Outbound	0	0	0	0	00:00	0	0	0	0	0	0	0	00:00	0%
Escalation Line	2	1	0	0	00:00	1	0	0	0	0	0	0	00:00	0%

You can filter which Queues report onscreen using the filter icon and change the sorting order by clicking on the column headers.

You can also select a different time range - the default is Midnight to now





Agents Realtime Metrics

Below the Queue data on the real-time data screen you will also see a list of agents currently in an active state.

On this page you can see the agents's current status, the routing profile they currently have and some indicative data on their performance in the time period selected.

Agents								
AGENT	TEAM	STATUS	DURATION	ROUTING PROFILE	HANDLED IN	HANDLED OUT	Avg HANDLE TIME	Avg ACW TIME
 Paul Egan	-	On contact	16m 4s	Email & Social	0	0	00:00:00	00:00:00

You can filter this list of Agents by their current status, Agent Hierarchy and routing profile.

Changing Agent Status and Routing Profile

From this screen you can amend an agent's status remotely if required by selecting one of the status codes from the dropdown menu against the agents name.

You can also change which Routing profile they have by selecting another existing routing profile from the dropdown menu.

If you need to create a new routing profile, then you will need to be an admin on the system to have access to create those.

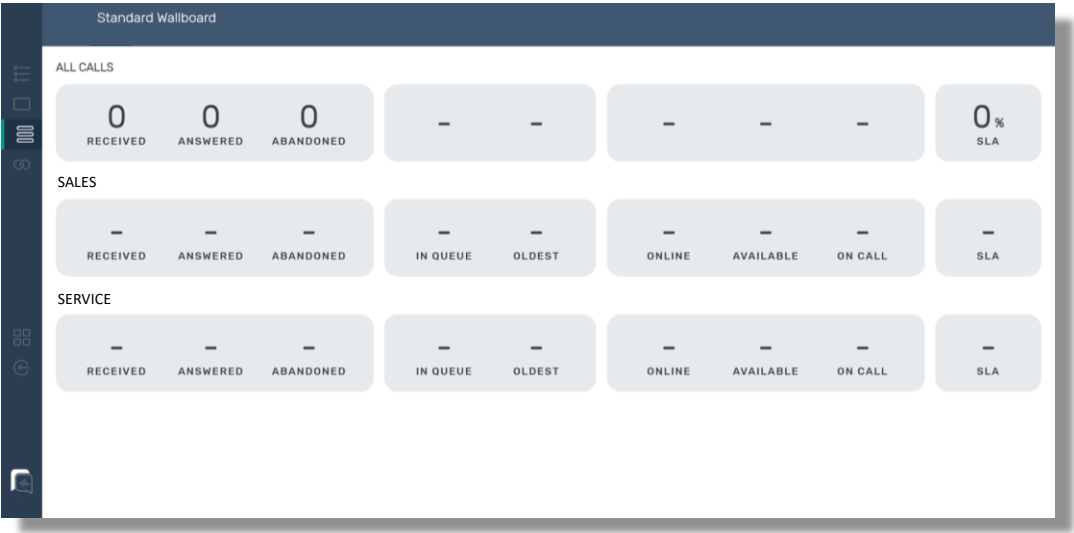
This is also the screen where you can live monitor contacts made by your team by clicking on the Eye icon which will appear when an Agent is on a live contact.





Wallboards

If your organization has enabled wallboards you will be given an additional URL link to a wallboard which can be shown onscreen to help manage service levels.



The wallboard will change colour from Red to amber to green within agreed parameters and will display specified call stats.

The menu on the left hand side offers a range of different views of the information and the option to access further wallboards if they have been configured.





Module 2: Agent & Contact support

By the end of this module, you will be able to:

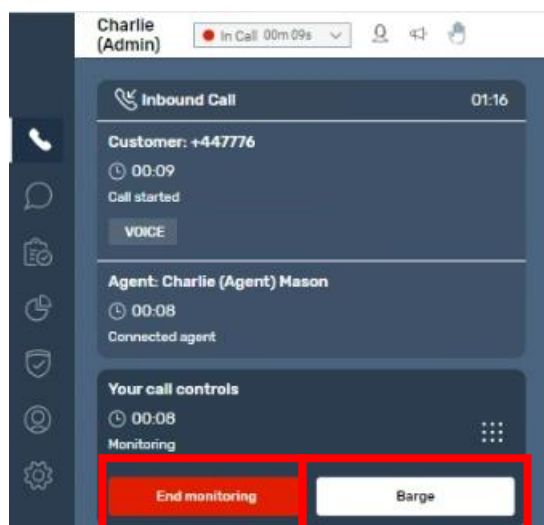
- Live Monitor voice calls
- Call barging on voice calls
- Acknowledge a hands up request
- User management for all Agents
- Create an announcement message to Agents
- Use Business Continuity function to switch off lines
- Use Welcome Messaging to change a Queue message
- Use the Audio settings

Live Monitoring a voice call

As a supervisor from the Real-time data screen you can also live monitor a voice call. Any agents that are “on contact” will have the “Eye” symbol next to their details. If you select the eye icon you will enter live monitoring. The Agent & Customer will not be aware you are listening in but you can hear both sides of the conversation.

AGENT	TEAM	STATUS	DURATION	ROUTING PROFILE	HANDLED IN	HANDLED OUT	AVG HANDLE TIME	AVG ACW TIME
Paul Egan	-	On contact	16m 47s	Email & Social	0	0	00:00:00	00:00:00

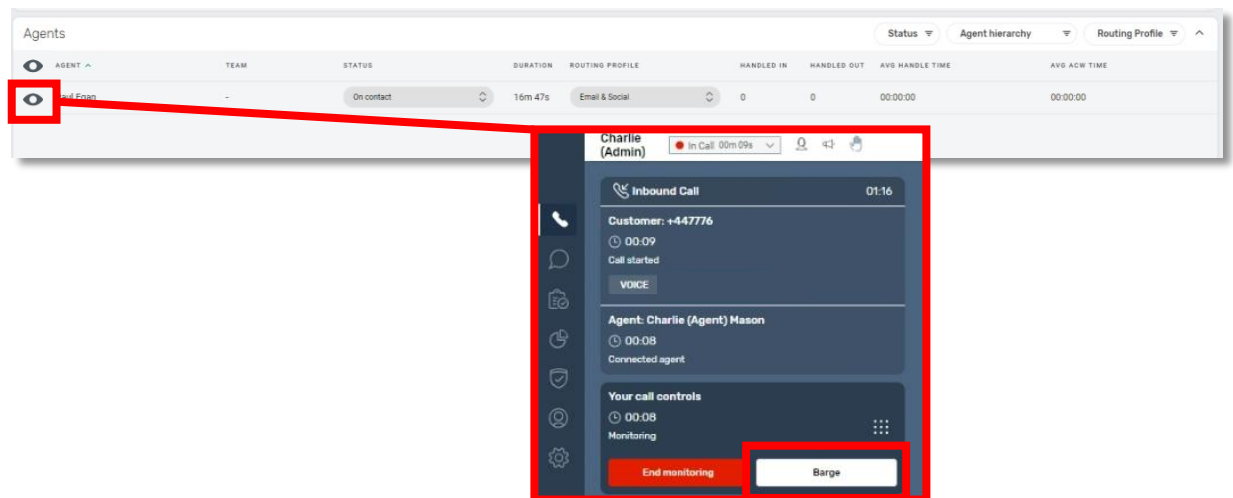
Once in the monitoring screen you can select “End Monitoring” or the “barge” option if you need to take control of the call.





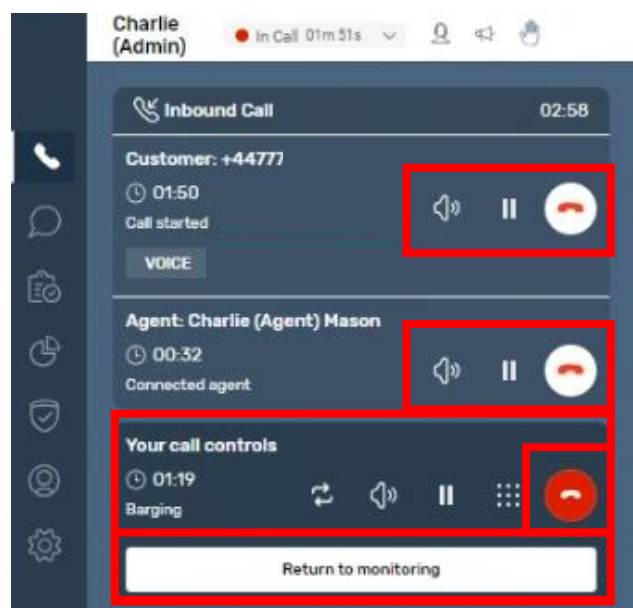
“Barging” into a call

In order to barge into a call as a Supervisor you must go to real time metrics screen and go into Live monitoring mode on the Agent on a call. You will then have the option to “Barge” into the call.



Barging will add you as an active participant on the call. The Agent will see you join the call onscreen with a tag of “barging” but the customer will not be aware unless you introduce yourself.

You will be able to control the call, mute the agent or customer, put them on hold or remove a party from the call. You can choose the “End monitoring” button if you no longer need to listen into the call – or select the “Return to monitoring” button which will return you back to silent monitoring without access to call controls.



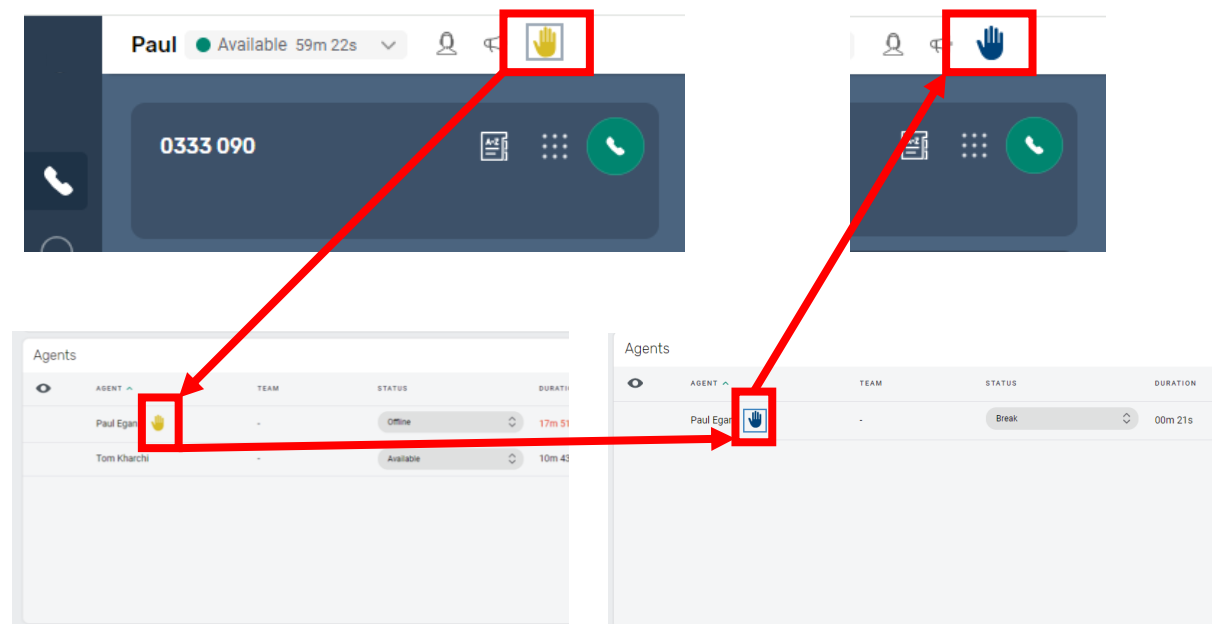


Acknowledge hands up request

If the “Hand Up” feature has been enabled for your organization than an agent can click on the hand signal near the top of the screen.

This will turn yellow, indicating they require assistance. If this has been done in error the agent can switch the alert off by clicking the hand again.

Supervisors will be able to see any “Hand Up” alerts on the Realtime Data screen Agents section.



If a Supervisor clicks on a hand it's colour will change from yellow to blue, acknowledging that it has been seen by a supervisor.

The Agent will see their Hand up change colour on their screen and know that help or assistance is on the way.

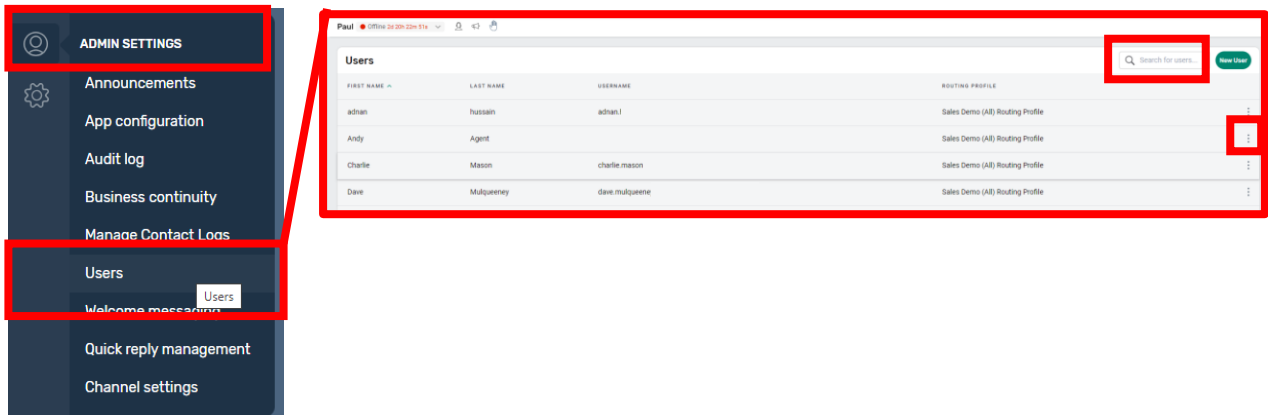




User management for All agents

An Offline agent's status or details can be changed by a supervisor in SmartAgent.

Go to “Admin Settings” Menu and select “Users”



This will bring up a list of all users – you can search for users or scroll manually across the list of current users. If you select the three dots to the right of the user name you can disable or delete that user. If you select the particular user you can then amend their details as required.

The image shows the 'Edit User' form with the following fields and options:

- Username***: charlie.mason@missionlabs.co.uk
- First Name***: Charlie
- Last Name***: Mason
- Mobile Number**: (empty)
- VOICE**: ☒ Auto-Accept Call
- Phone Type***: Soft Phone
- After call work timeout (secs)**: 0
- Routing Profile***: Sales Demo (All) Routing Profile
- Security Profile***: Admin
- AGENT HIERARCHY**: (empty)

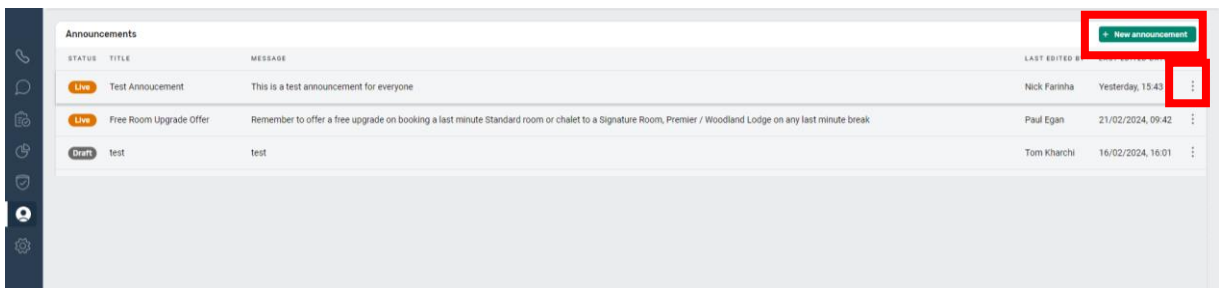
If you want to make a large number of changes to users then getting an admin to do this in Connect via a csv upload may be a preferable option.





Create and Editing an Announcement

If you have the access in your security profile you will be able to create and edit announcements by going to “Admin Settings” on the left hand menu and selecting “Announcements” This will take you to a screen where you can see any current or draft announcements and can create a new announcement.



When you create a new announcement you need to give it a unique title and then input the message details, which can contain hyperlinks if needed. You then must input an expiry period and choose an option of who to send it to.

You can send it to all users, to a particular element of your Agent Hierarchy or to users with a particular routing profile.

You can then choose to save this message as a draft. This will not send out the message, but will enable it to be used as a template for other messages. You can edit an existing message from the Announcement list message by opening it, renaming it, and saving it as a further draft or publishing it.

If you choose the “publish” option, you will need to confirm you want to publish the message and it will then be sent out as you have requested.





Announcement report and deletion

You can view the status of all current messages from the announcement screen and by clicking on the three dots on the right-hand side, you can edit or delete an announcement.

Status	Title	Message	Last Edited By	Last Edited Date
Live	Test Announcement	This is a test announcement for everyone	Nick Farinha	Yesterday, 15:43
Live	Free Room Upgrade Offer	Remember to offer a free upgrade on booking a last minute Standard room or chalet to a Signature Room, Premier / Woodland Lodge on any last minute break	Paul Egan	21/02/2024, 09:42
Draft	test	test	Tom Kharchi	16/02/2024, 16:01

If you choose to delete an announcement it will be removed from all users announcement screens, even if it was setup with a “Never” expiry option.

If the message is “live” you can also choose the “View Report” option which will present you with a list of users the report was sent to. You can then use the filter option to sort the list and highlight those that have or have not yet read and acknowledged the announcement.

Status	Name	Read At
Unread	Dave	-
Unread	Matthew	-
Unread	Nicky	-
Unread	Nick	-
Read	Paul Egan	Today, 12:02
Unread	Tom	-





Business Continuity Settings

Whilst your admins may make changes in your systems Hours of Operation to cover planned interruptions in service, such as public holidays, in an emergency or evacuation situation it is essential that you have the tools available to make instant alterations to call routing and customer messaging.

SmartAgent provides a self-service Business Continuity screen to enable quick disabling/enabling of lines along with the ability to insert custom messaging informing callers for the reason for the calls being switched off.

If this feature has been configured for your setup and you have the access to it, you will find it in the Admin Settings menu under “Business Continuity”.

Each setup will be unique, but it will usually take the form of a global Switch-off option and then a sub menu of other options which may be based around location / brands or different activity types.

If the toggle switch is green, then lines / channels are active. If however, you get an unexpected situation, you can switch them off by selecting the toggle switch, turning it to red. You can then input a specific text message that will be played to customers while the lines are switched off and select the “Save” button.

Once the emergency situation has passed you can simply toggle the switch to turn the particular grouping / activity back on again.





Welcome Messaging Settings

As part of your Organization's SmartAgent setup you will have a series of prompts and messages that are played to people in queues while they are waiting to be answered or as part of your customer journey through various menu options.

Your admins will be able to make any changes needed to these but some organisations want the ability to adapt these in the event of something unexpected happening.

If this has been setup for your organization and you have access, you will find this customized “Welcome Messaging” in the Admin Settings menu on the left.

Welcome Messaging
Easily set global or line specific welcome messages

Filter Lines

Line Status: All | Keyword: | Clear

Global welcome message

Welcome message active: ☒
An active status will enable welcome messages for contacts. To deactivate this welcome message, switch the toggle to inactive.

Welcome message*
Hello and thank you for calling. Just to let you know that due to issues with our payments system, long delays are expected on all phone lines today. For less urgent queries, we would suggest calling back tomorrow. Please be aware that we may record calls for training and monitoring purposes.

Save

Main Demo

Welcome message active: ☐
An active status will enable welcome messages for contacts. To deactivate this welcome message, switch the toggle to inactive.

Welcome message*
Thank you for ringing our demo line today

Save

ML

Welcome message active: ☒
An active status will enable welcome messages for contacts. To deactivate this welcome message, switch the toggle to inactive.

Welcome message*
Hello and thank you for calling

Save

This will be unique to your organization but the setup will generally take the form of a “global message” that will be played over and above any other departmental level messages if enabled.

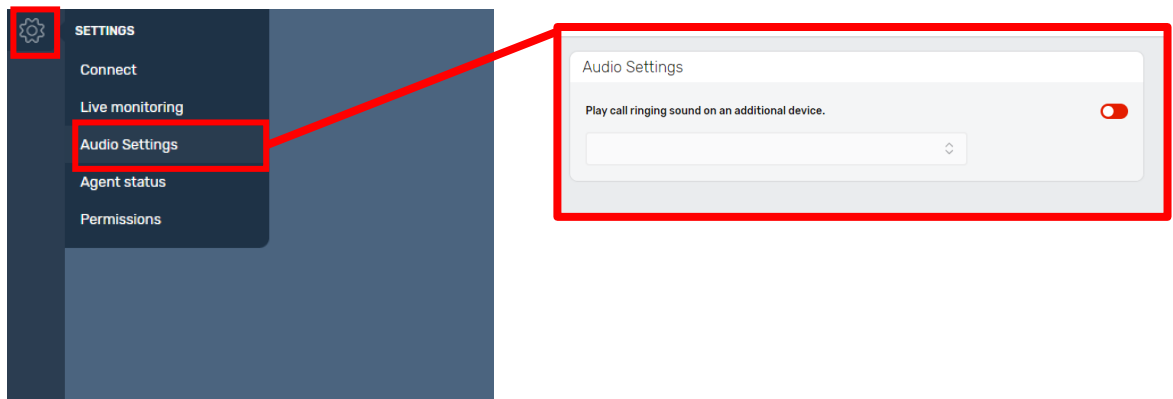
Sub messages can also be setup for particular departments / brands or channels. These can ONLY be enabled if the global message is switched off. The particular message can be entered into the text field and saved to provide an updated message, as needed, if a situation is changing dynamically.



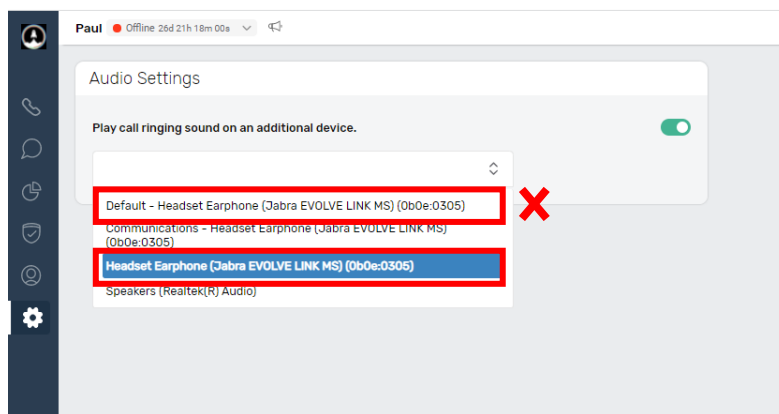


Audio Settings

As a supervisor you may be juggling a lot of different tasks and may not have your SmartAgent browser tab maximized or in view at all times. As well as onscreen notification of any calls being routed to you, you can also switch on a setting to play a ringing tone on a connected device.



If the toggle switch is red it is not turned on – if you toggle it to green you can then access the dropdown field and select a connected audio device.



The dropdown box will present a list of audio devices connected to your device – these may include laptop speakers or a headset / mobile phone earpiece etc.

Some devices may create duplicate responses, sometimes marked as “Default” these may not be correctly linked to a speaker and so you should test the selected device rings correctly. If you need to amend the connected device, you can select another from the list if the audio settings function is enabled.





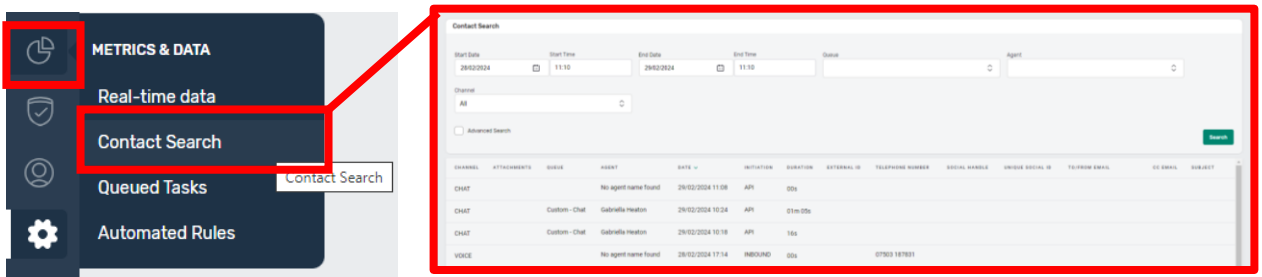
Module 3: Historic data

By the end of this module, you will be able to:

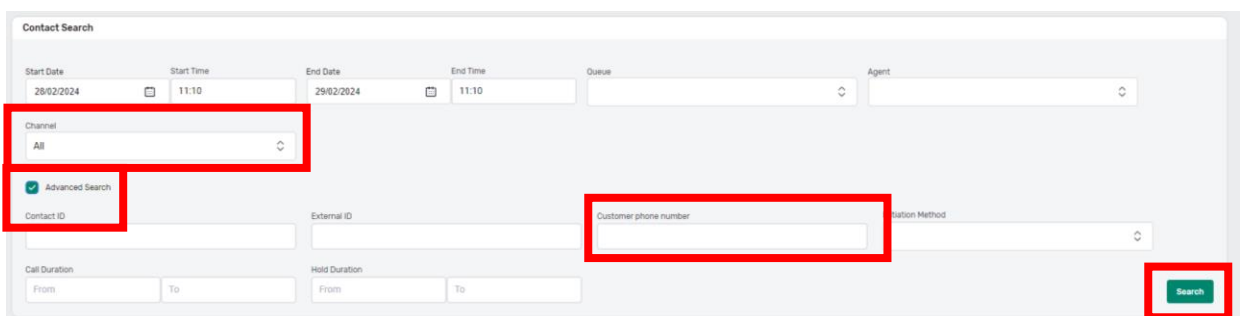
- Access Call recordings and CTR data in SmartAgent
- Access Historic reports in Connect- Queues
- Access Historic reports in Connect- Agents

Access Call Recordings and CTR in SmartAgent

Call recordings and Contact records (CTR's) are available within SmartAgent and can be accessed in Contact Search from the Metrics and Data menu.



The screen will automatically load all contacts within the last 24 hours across all channels, but you can do a refined search using the various data fields in standard search or advanced search options.



If you select certain channels this will also provide additional search parameters , for example if you select Email channel you can search by Email address as to / from or as CC'd email address.

Once you have the record you want to check click it in the list to bring up the details of the contact.





Access Call Recordings and CTR in SmartAgent (continued)

There will be a CTR record kept of every contact type, Voice call, chat interaction or email, so the information displayed will depend on the contact type and what features have been enabled for your organization.

The Contact Details field contains all the key metric information of the contact and additional meta-data, such as user defined fields, the options chosen by the customer and any after contact work notes input by the Agent. The full data can be accessed by selecting the “show more” option.

The screenshot displays the SmartAgent interface with a contact details table, a call recording player, and a transcription section. The contact details table is highlighted with a red box, and the call recording player is also highlighted with a red box. The transcription section shows a chat conversation with a customer.

Contact ID	Initiation Method	Duration
acdb04	INBOUND	02m 52s

Start time	External ID	Customer Number	System Number
21/02/24 16:57	Unknown	07917	0330 - test user

Queue	Reason for contact	Time in Queue	ACW Duration
CEX	CEX	00m 05s	00m 05s

Agent	Disconnect reason
Paul Egan	THIRD_PARTY_DISCONNECT

Notes: No notes

Show More

Call Recording: 00:00:00 / 00:02:17. Speed: 1x. Download.

Voice analytics: Keywords: hello. Customer Sentiment: Negative 0%, Positive 0%, Neutral 100%.

If the contact is a voice recording and call recording is switched on, then a call recording field will appear. In the area you can mute one side of the conversation if needed, can play the recording back at different speeds, scroll to a particular point in the recording or download a copy.

If additional features have been enabled you may have a transcription of the chat / messages or Sentiment analysis done by the “Contact Lens” feature.

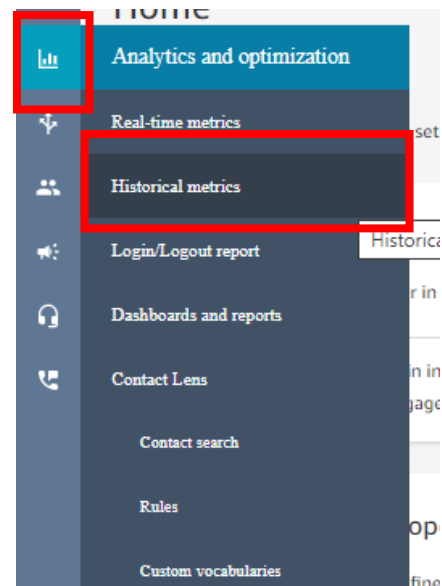
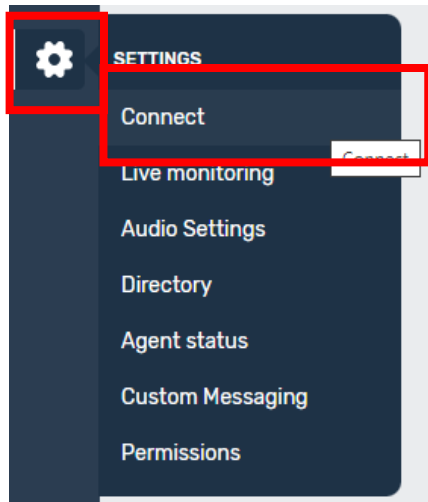
If the QA Module has been enabled you will also be given the option to evaluate the call using the QA feature.





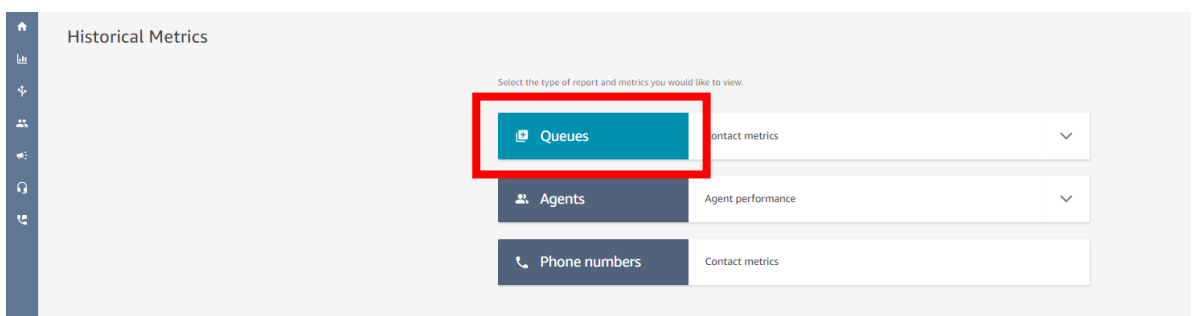
Access Historic metrics in Connect – Queues

Historic metrics are available within the Amazon Connect application. As a supervisor you may be given access to this part of the application. Access may be restricted to just view reports, or you may also have the ability to create and share reports.



Connect can be accessed from the Settings menu – this will then open an additional tab in Amazon Connect. Historic and Realtime metrics, as well as other reporting features can be accessed from the “Chart” menu option.

You will then be presented with some options for what type of report you want to view or create. Each option will present a “standard” report which you can then reconfigure and save or share as appropriate. Reports can be scheduled to happen at regular intervals and be formed into dashboards in the Connect reporting section.





Access Historic metrics in Connect – Queues (Continued)

When you open a report it will have a standard set of columns – if you select the cog on the right hand side you can select additional metric columns, use various groupings and filters to breakdown the data and amend the interval and time ranges as required.

What's New?
We have introduced a new Feedback Widget for you. Please click on Share your feedback on Real-time metrics and Historical metrics page to help us improve. [Share your feedback](#)

Historical metrics: Queues

Interval: Total

Interval & Time range: Feb 22, 2024, 12:00 AM - Feb 29, 2024, 12:00 AM

Time Zone: UTC

Queue	Service level 60 seconds	Service level 120 seconds	Average after contact work time	Average agent interaction time	Average customer hold time	Average handle time	Average queue abandon time	Average queue answer time
BackQueue (inbound)	100.00%	100.00%	-	-	-	-	00:00:43	-
CSX	100.00%	100.00%	00:00:30	00:00:41	00:00:21	00:01:33	-	00:00:20
Custom - Chat	94.74%	100.00%	00:02:36	00:20:00	-	01:12:37	00:00:32	00:00:20
Financial Services - Voice	100.00%	100.00%	-	-	-	-	00:00:14	-
sa-lead-queue	0.00%	0.00%	00:00:05	00:38:15	-	00:38:21	-	00:33:49

Rows per page: 10 1-5 of 5

Actions

Save report

Save as

Download CSV

Share report

Schedule

When you have the data as you need it you can save the report and give it a name. Saved Reports can be downloaded as CSV files for further processing or shared and scheduled as necessary if you have permission to do so.

Once a report is saved it is stored in the “Dashboards and Reports” section, under the relevant tab.

Analytics and optimization

Real-time metrics

Historical metrics

Login/Logout report

Dashboards and reports

Contact Lens

Contact search

Rules

Custom vocabularies

Dashboards and reports

Dashboards

Service level (Home)

Real-time metrics

Historical metrics

Login/Logout report

Search by report name

Create report

Saved reports (6)

Name	Owner	Published	Modified	Created
Sample abandoned calls details	paul	No	Oct 24, 2023	Oct 24, 2023
Agent abandoned calls metrics	paul	No	Oct 24, 2023	Oct 24, 2023
contacts abandoned metrics queue	paul	No	Oct 24, 2023	Oct 24, 2023
sharentest3	sharon	Yes	Nov 23, 2023	Jul 15, 2023
sharentest	sharon	Yes	Jul 15, 2023	Jul 15, 2023
Example agent performance	paul.egam	Yes	Sep 8, 2022	Sep 8, 2022

Rows per page: 10 1-6 of 6

From this list page you can then select a report and delete it, or choose to share it or schedule it as required.

Dashboards and reports

Dashboards

Service level (Home)

Real-time metrics

Historical metrics

Login/Logout report

Search by report name

Create report

Saved reports (6)

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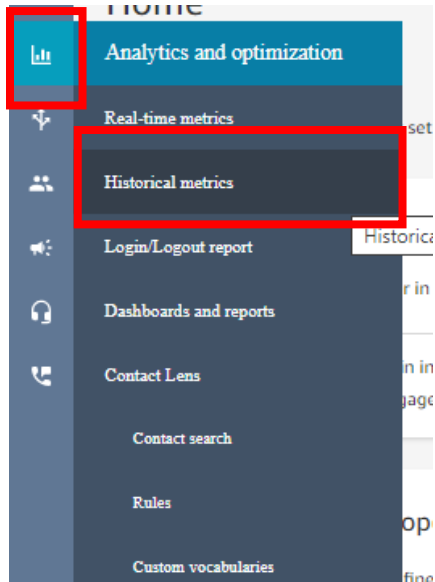
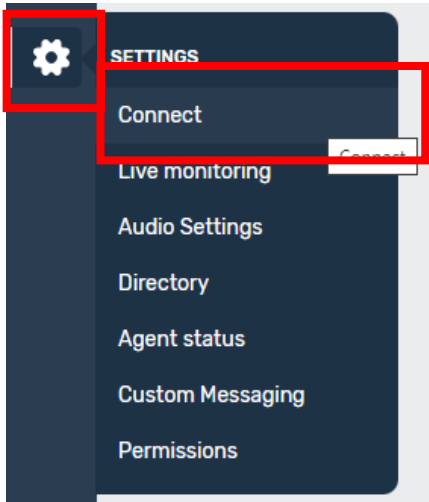
Rows per page: 10 1-6 of 6





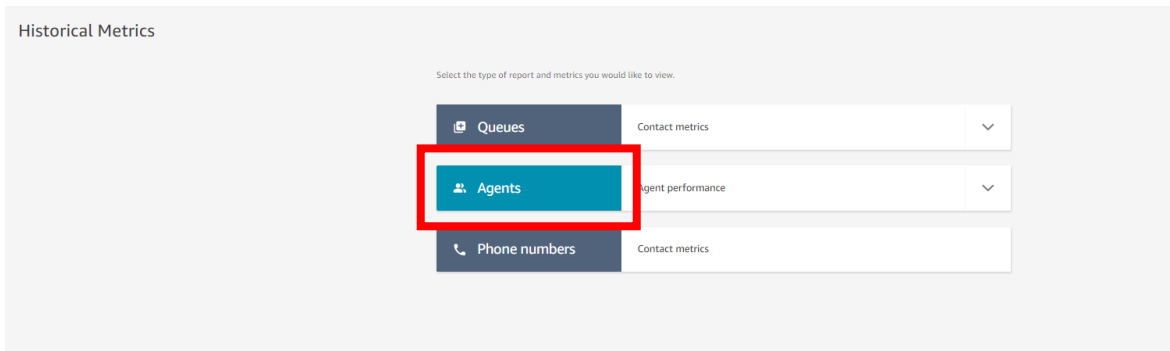
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Access Historic metrics in Connect – Agents (Continued)

When you open a report it will have a standard set of columns – if you select the cog on the right hand side you can select additional metric columns, use various groupings and filters to breakdown the data and amend the interval and time ranges as required.

Historical metrics: Agents

Interval: Total
Interval & Time range: Jan 30, 2024, 12:00 AM - Feb 29, 2024, 12:00 AM
Time Zone: UTC

Agent	Agent answer rate	Agent idle time	Agent non-response	Agent on contact time	Non-Productive Time	Occupancy	Online time	Average after contact work time	Average agent interaction time	Average agent response time
perkins	65.31%	00:12:59	27	23:49:09	04:59:36	19.31%	176:45:00	00:16:41	00:12:41	00:00:12
marks	-	-	-	-	-	-	-	-	-	-
pasda	73.68%	04:06:40	5	01:11:57	00:32:28	1.84%	65:51:07	00:00:41	00:04:06	00:00:31
rewards	100.00%	17:57:54	-	06:52:49	-	82.81%	104:50:44	24:07:06	04:43:50	-
tem	50.00%	14:58:31	17	68:58:13	21:11:25	82.09%	104:48:11	00:04:37	04:29:52	-

Rows per page: 10 • 1-5 of 5

When you have the data as you need it you can save the report and give it a name. Saved reports can be downloaded as CSV files for further processing or shared and scheduled as necessary if you have permission to do so.

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Analytics and optimization

- Real-time metrics
- Historical metrics
- Login/Logout report
- Dashboards and reports**
- Contact Lens
- Contact search
- Rules
- Custom vocabularies

Dashboards and reports

Service level (Home) Real-time metrics **Historical metrics** Login/Logout report

Search by report name

Create report

Saved reports (6)

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contacts abandoned metrics queue	paol	No	Oct 24, 2023	Oct 24, 2023
sharontest3	sharon	Yes	Nov 23, 2023	Jul 15, 2023
sharontest	sharon	Yes	Jul 15, 2023	Jul 15, 2023
Example agent performance	paol.egam	Yes	Sep 8, 2022	Sep 8, 2022

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Dashboards and reports

Service level (Home) Real-time metrics **Historical metrics** Login/Logout report

Search by report name

Create report

Saved reports (6)

Schedule report	Name	Published	Modified	Created
	Sample abandoned calls details	No	Oct 24, 2023	Oct 24, 2023
	Agent abandoned calls metrics	No	Oct 24, 2023	Oct 24, 2023
	contacts abandoned metrics queue	No	Oct 24, 2023	Oct 24, 2023
	sharontest3	Yes	Nov 23, 2023	Jul 15, 2023
	sharontest	Yes	Jul 15, 2023	Jul 15, 2023
	Example agent performance	Yes	Sep 8, 2022	Sep 8, 2022

Rows per page: 10 • 1-6 of 6





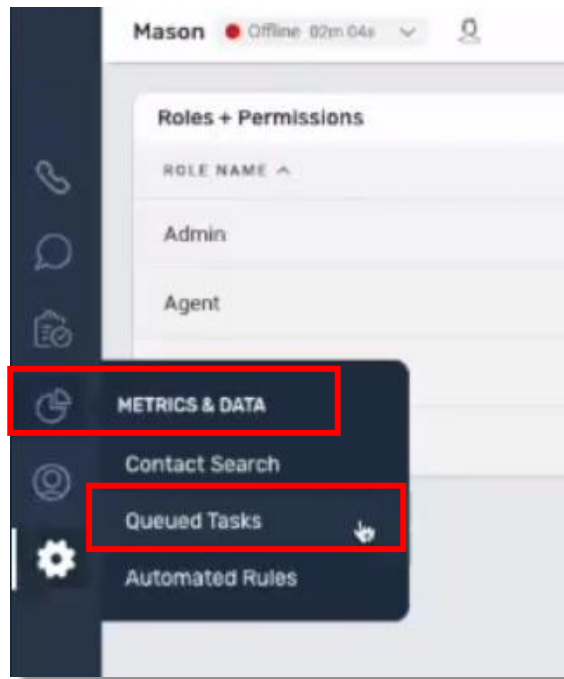
Module 4 Optional extras

By the end of this module, you will be able to:

- Using Queued Tasks
- Use QA Module to evaluate a contact

Manage Queued Tasks

Queued tasks are normally managed by a distinct group of users, often those who may have supervisor access, so Queued Tasks is located under the metrics and data menu option.



Within the Queued tasks screen you can search for a task containing particular text, from a specific channel or queue or by enabling the toggle switch to search for a specific contact ID. Once you have entered your search parameters hit the search button and the filtered results will appear in the field below.





Manage Queued Tasks (Continued)

Within this field you can use the “select all” button or specific items by clicking the tickbox next to the item.

Once you have selected items you can then bulk export, move or reply to all the selected items.

The screenshot shows the 'Queued Tasks' interface. At the top, there are search filters: 'Text Entry' (with a dropdown), 'Channel' (with a dropdown showing '1 Channel(s) selected'), and 'Queue' (with a dropdown showing 'No Queue(s) selected'). Below these is a 'Search' button. A 'Search by Contact ID' checkbox is also present. Below the filters, there are '2 results'. On the left, there is a 'Select All' button and two checkboxes. On the right, there are 'Export', 'Reply', and 'Move' buttons. The table below has columns: CHANNEL, CUSTOMER DETAILS, SUBJECT, MESSAGE, QUEUE, and DATE. The first row shows an email from mason.rooney@missionlabs.co.uk with subject 'Test' and message 'Test 123 [signature_310352473] Mason Rooney Technical Business An...'. The second row shows an email from azeez.alabi@missionlabs.co.uk with subject 'testing' and message 'Nowwww'.

SELECT	CHANNEL	CUSTOMER DETAILS	SUBJECT	MESSAGE	QUEUE	DATE
☐	EMAIL	mason.rooney@missionlabs.co.uk	Test	Test 123 [signature_310352473] Mason Rooney Technical Business An...	Tasks	18/04/2023 10:22
☐	EMAIL	azeez.alabi@missionlabs.co.uk	testing	Nowwww	BasicQueue	13/04/2023 09:46

Reply / Bulk reply to Queued Tasks

Once you selected the item or items you want to reply to select the reply button.

The screenshot shows the 'Queued Tasks' interface with the first item selected. The 'Select All' button is now disabled, and the first checkbox is checked. The 'Reply' button is highlighted with a red box. The table below shows the same data as the previous screenshot.

SELECT	CHANNEL	CUSTOMER DETAILS	SUBJECT	MESSAGE	QUEUE	DATE
☒	EMAIL	mason.rooney@missionlabs.co.uk	Test	Test 123 [signature_310352473] Mason Rooney Technical Business An...	Tasks	18/04/2023 10:22
☐	EMAIL	azeez.alabi@missionlabs.co.uk	testing	Nowwww	BasicQueue	13/04/2023 09:46





Reply / Bulk reply to Queued Tasks (Continued)

You will then be shown a text box where you can write a response to all the selected tasks. You can access any Quick replies or formatting options. If you have been given permission, you will also see the attachment icon to add attachments.

If you have the permission you can add an attachment to either a single queued task or a number of queued tasks (bulk queued tasks). These permissions are separated, so the attachment icon may appear depending on how many tasks you have selected.

Namely if you select multiple tasks, you need to have the “bulk attachment” permission for the icon to appear. If you only have permission to just “add attachment” then this icon will only occur if you reply to one task at a time.

You can select multiple attachments but need to consider any capacity / file size restrictions within your mailbox settings. The attachment will show onscreen with a file icon, allowing you to check it is the correct attachment and it’s size before sending out.

Reply to Contacts

2 Contacts selected

Cancel

Reply

The text box below allows you to send a reply to all the contacts that you have previously selected. If you no longer wish to send a reply to these contacts, select the cancel option. Replied to contacts will still be in a queue and available to agents.

Email/Webform Replies

Test reply



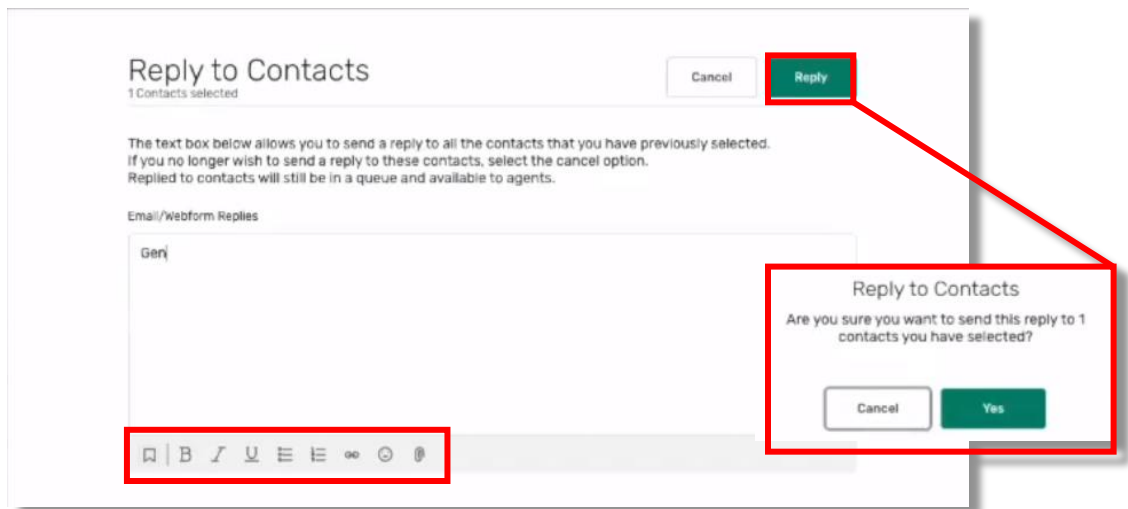
Rich text editor toolbar with icons for bold, italic, underline, link, unlink, bulleted list, numbered list, indent, outdent, undo, redo, and help.





Reply / Bulk reply to Queued Tasks (Continued)

Once you select the reply button you will be asked to confirm if you want to send this reply to the number of selected contacts.



Using Queued Tasks menu to end contacts

Once you have replied to contacts, if you have permission, you will be offered the opportunity to end these contacts. You can enter notes, add a reason for the contact and then choose the yes option to end the contact, or No option for the contacts to remain in the queued task list.



You will get an onscreen progress report as the selected tasks are processed and ended. This may take upto 30 seconds to complete and any errors or issues will be highlighted.





Using the QA Module to evaluate a call (If enabled)

If the QA module has been enabled if a supervisor uses the “Contact search” function to search for a particular call recording or transcript then they will see an additional Quality Assurance field below the contact details.

Paul Offline 2d 23m 46m 24s

< Back to search results

Contact Details		Initiation Method	Duration
Contact ID	c6cb9a4e-062c-4f6b-852a-a3429ea81199	INBOUND	02m 45s
Start time	08/11/21, 13:28	Customer Number	0113 868 5253
Queue	Customer Support (voice)	Time in Queue	00m 06s
Agent	Paul Egan	Disconnect reason	AGENT_DISCONNECT

Notes

No notes

Show More

Call recording 00:00:00 / 00:02:45 Speed: 1x load

00:00 02:45

Quality Assurance In Progress

The contact is currently being evaluated by Paul Egan

Open evaluation

If you select the “Open Evaluation” button you will be able to evaluate the contact, once you have selected the evaluation form to be used. You will need to select the scoring template from the dropdown box.

New Evaluation

CHANNEL

☒ Voice ☐ Email

< Back

DATE OF CONTACT	AGENT	QUEUE	DURATION
23/04/2021 13:49		Customer Support (voice)	01m 35s
16/04/2021 16:33		Administration (voice)	00m 18s

<< < 3 of 3 > >> Go to page 1 Go

Choose Score Template*

Test Template





Using the QA Module to evaluate a call (continued)

You can then listen to the call and complete the QA form online.

When you are finished select the green “calculate score” button. Once you have selected the “Calculate Score” button this locks in the score for the call. This new score will be highlighted to the Agent so they can review your form and read any feedback

The screenshot displays the QA Module interface. On the left, a sidebar contains navigation icons. The main area is divided into two sections. The top section, titled 'Contact Details', contains a table with the following data:

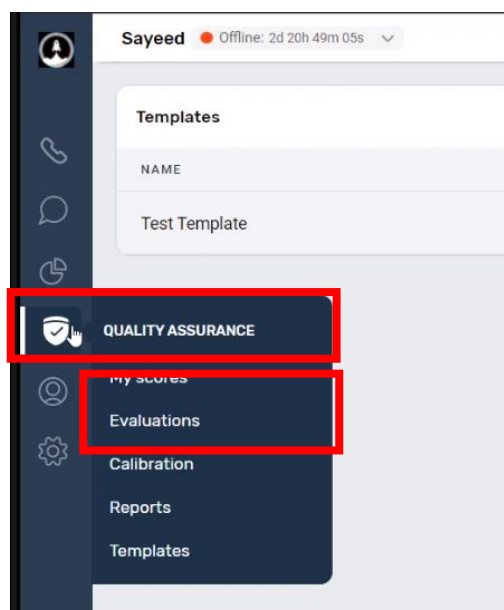
Contact ID	Initiation Method	Duration
705f8b9d-4f6c-4fc1-4db0	OUTBOUND	00m 06s

Below this table, there are fields for 'Start time' (10/08/21, 13:27), 'External ID' (Unknown), 'Customer Number' (0333 09 01131), and 'System Number' (01131). Further down, there are fields for 'Queue' (Outbound), 'Reason for contact' (Unknown), 'Time in Queue' (00m 00s), and 'ACW Duration' (01m 00s). The 'Agent' field is set to 'Dave Mulqueeny' and the 'Disconnect reason' is 'AGENT_DISCONNECT'. A 'Notes' section at the bottom contains the text 'CircleLoop Test Call' and a 'Show More' link.

The bottom section, titled 'Call recording', shows a timeline from 00:00:00 to 00:00:07 with a play button and a speed control set to '1x'.

On the right, a 'Sample QA Form Example' is shown. It includes a 'Call Opening' section with a question: '1 Did the agent answer the call using the correct greeting message? Did the agent sound ready to help the customer? Could you hear them smile?'. The form has radio buttons for '1 Standard not met', '2 Basics met', and '3 Excellent example', followed by a 'Comments...' field. Below this is an 'ID &V or Legal compliance - Pass or fail' section with a question: '2 Was the Customer ID&V'd in correct manner. Was the legal Compliance statement readout clearly?'. It has radio buttons for '3 correct items of ID&V or procedure followed Legal Compliance statement read out in full (This is the full text of the compliance statement that agents have to read out to customers so they are fully aware of any T&C's or regulatory compliance standards - Can you please confirm you agree?)', 'Not completed correctly', 'Completed but rushed', and 'Completed clearly', followed by a 'Comments...' field. The 'General Call Quality - Multiple Questions within section' section includes a question: '3 Did the agent make the conversation Personal / tailored to the reason for the call? Treating every person as they wish to be treated is crucial when building rapport with customers; that means appreciating what the customer is asking of us and tailoring our approach in a way that is right for them'. It has radio buttons for 'Stock / stilted answers', 'Some personalisation', and 'Customer delighted', followed by a 'Comments...' field. The form ends with a question: '4 Did the agent offer appropriate other services to add value? Did they ask open Questions to'.

Previous call evaluations can be searched and viewed from the “evaluations” submenu which can show scores and progress of an evaluation. You can also start a new evaluation from the evaluations page.





Using the QA Module to evaluate a call (continued)

You can either use the basic search menu, or select the advanced search function to filter your search even further.

If an evaluation gets interrupted or is not completed it will show as “in progress” on this screen and the evaluator can go back in a complete the evaluation at a later date.

Evaluations

Search

Submit

ID	CREATED	CONTACT DATE	AGENT	EVALUATOR	QUEUE	CHANNEL	STATUS	SCORE	CALIBRATION
BUBNOK-22-08-08-RLD	08/08/2022 17:11	22/04/2022	Kiril Bubnov	Mariya Antipenko	Main Customer Care	Voice	In Progress		
BUBNOK-22-08-08-IFZ	08/08/2022 16:28	08/08/2022	a Kiril Bubnov	Aliona Radetskiya		Email	In Progress		
BUBNOK-22-08-08-NYN	08/08/2022 16:27	08/08/2022	a Kiril Bubnov	Aliona Radetskiya		Email	Done	100%	
BUBNOK-22-08-08-QDC	08/08/2022 16:23	08/08/2022	a Kiril Bubnov	Aliona Radetskiya		Email	In Progress		
BUBNOK-22-08-08-NEV	08/08/2022 16:23	08/08/2022	a Kiril Bubnov	Aliona Radetskiya		Email	In Progress		
ARHMA-22-08-08-ZMK	08/08/2022 16:03	16/04/2022	Mariya Antipenko	Aliona Radetskiya	_BasicQueue	Chat	Fail	0%	
UAKSH-22-08-08-NYF	08/08/2022 12:38	08/08/2022	James Simons	James Simons	_BasicQueue	Voice	In Progress		
ARHMA-22-08-08-CHC	08/08/2022 11:31	23/04/2022	Mariya Antipenko	Mariya Antipenko	_BasicQueue	Voice	Fail	21%	
BUBNOK-22-08-08-HYM	08/08/2022 11:30	08/08/2022	a Kiril Bubnov	Aliona Radetskiya		Caseflow	Fail	0%	
BUBNOK-22-08-08-TDZ	08/08/2022 10:55	08/08/2022	Kiril Bubnov	Kiril Bubnov		Caseflow	In Progress		
BUBNOK-22-08-08-QHQ	08/08/2022 10:11	08/08/2022	a Kiril Bubnov	Aliona Radetskiya		Caseflow	Fail	0%	
MASONC-22-08-05-QEB	05/08/2022 16:23	05/08/2022	Charlie Mason	Charlie Mason		Email	Fail	0%	
UTENH-22-08-03-QOA	05/08/2022 13:54	05/08/2022	Artemia Dmitriyeva	Mariya Antipenko		Email	Fail	0%	

