Software by Inisoft

syntelate XA

Supervisor

Published Friday, December 20, 2024

Release 3.0.0

Contents

1. Supervisor

1.1 Overview

This document describes the supervisor desktops in Syntelate XA:

- Syntelate XA Configuration Desktop ("configuration desktop")
- Syntelate XA Dashboard Desktop ("dashboard desktop")

These desktops are for contact center supervisors, managers, team leaders, and system administrators.

1.2 Concepts

1.2.1 Configuration Desktop

Use the configuration desktop to manage agent groups, email rules, disposition codes, working hours and holidays, customer feedback, and other types of information crucial to the day-to-day operation of the contact center.

1.2.2 Dashboard Desktop

Use the dashboard desktop to view real-time and historical data for the contact center's activity. In addition, you can create reports from that data and export the reports to a spreadsheet (Microsoft Excel format).

1.3 What Next?

Explore this document to find out how to use the desktops.

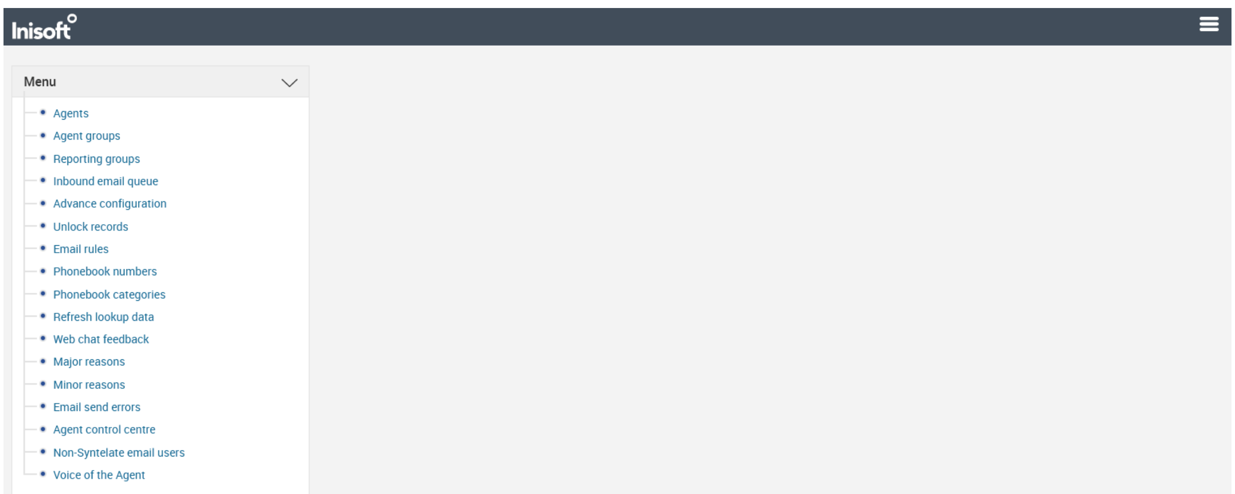
> **Tip:** If your role involves handling live customer interactions, we recommend that you learn about the Syntelate XA Agent Desktop. See the *Syntelate XA - Agent* document.

2. Configuration Desktop

2.1 Overview

This section describes the Syntelate XA Configuration Desktop ("configuration desktop"). It's where supervisors can manage the day-to-day operations of the contact center.

2.2 Concepts



The configuration desktop presents you with a **Menu** of configuration panes. When you select a configuration pane, (for example, Agent Groups), it will be displayed in the main area of the desktop.

> **Note:** The exception is the configuration pane for **Designer Permissions Users**. This is not part of the configuration desktop, but instead is provided as a standalone configuration pane.

2.3 Features

The configuration desktop features allow you to carry out tasks such as:

- Manage agent groups
- Create email rules
- Change operational hours
- Review customer feedback
- Manage the major and minor reasons

And there are other operational areas you can manage. Explore the rest of this section to learn more about the configuration desktop.

2.4 Accessing the Configuration Desktop

You can access the configuration desktop if you are a member of an agent group that's assigned to a configuration workzone. (If you don't know which groups and workzones you are a member of, ask your manager.)

If you are a member of one agent group only, then after you log in to Syntelate XA you will be automatically logged onto whichever desktop your group is assigned to.

If you are a member of multiple agent groups, after you log in to Syntelate XA, you will be asked to pick a workzone to log onto. The workzone list will show you the workzones that you are a member of. The name of your configuration workzone is decided by your company, but it's likely to be Configuration or similar. If you don't see the workzones list, or you think there is a workzone missing from the list, ask a manager for help.

> **Note:** If you are not familiar with workzones, see the section 'Concepts' in the PDF Guide, *Syntelate XA - Agent* for a simple overview, and see the section 'Workzone Editor' in the PDF Guide, *Syntelate XA - Designer* for a technical overview.

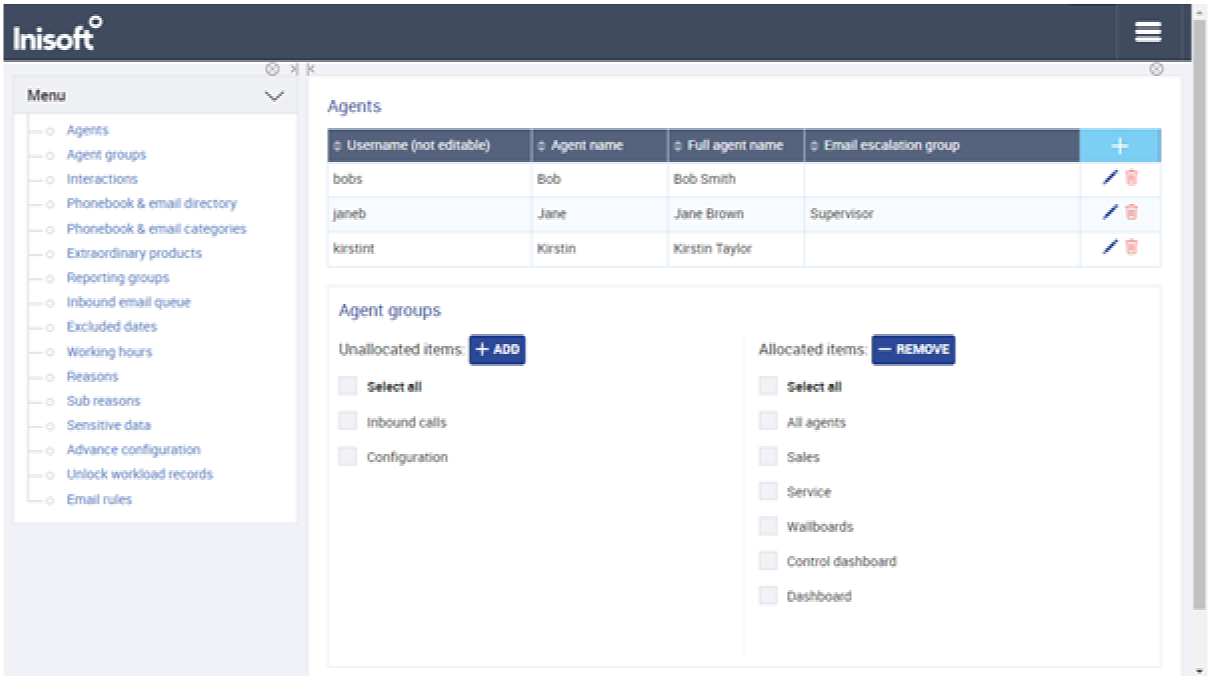
2.5 Agents

From the **Agents** configuration pane you can add or edit the details of each agent. In addition, you can view and manage the agent groups they belong to.

Use the **Agents** grid to add new agents or edit individual agent details.

Underneath that grid, you see the **Agent groups** allocation lists. Use it when you need to assign multiple groups to one agent, or see which groups an individual agent belongs to.

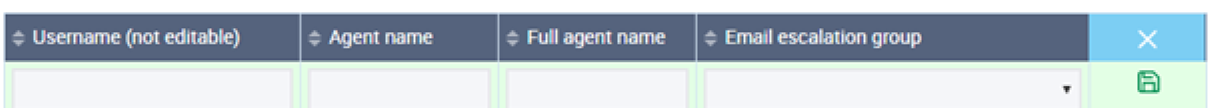
> **Note:** If you want to add or manage the details of an agent group, or quickly see all the agents who belong to one group, use the Agent Groups on page 19 pane instead.



2.5.1 Adding an Agent

1. Click the **Add** button + .

2. In the newly generated row, type the agent's Windows username in the **Username** field.



3. In the **Agent name** field, type the name of the agent as it should appear to customers (in web chats, for example).

4. In the **Full agent name**, type the full name of the agent.

5. If you want the agent's emails to be routed to a supervisor for approval before sending, select an agent group of supervisors in the **Email escalation group** dropdown.

6. Click Save .

Note:

In the **Username** column header, “(not editable)” means that the username cannot be changed after it’s set.

2.5.2 Editing an Agent

To edit the details of an existing agent, follow these steps:

1. Click on the **pen** icon for the agent that you want to edit.

2. Edit the agent’s details. (You cannot change the **Username**.)

3. Click the **check** icon to save your changes.

2.5.3 Deleting an Agent

To delete an agent, follow these steps:

1. Click the **trashcan** icon for the agent that you want to delete.

2. Click OK to confirm the deletion.

2.5.4 Allocating Agents to Agent Groups

From the **Agents** configuration interface, you can allocate individual agents to one or more agent groups.

To allocate an agent to one or more agent groups, follow these steps:

1. Click on an agent in the grid to select that agent. This updates the **Agent groups** section underneath the grid, which shows:
   - **Allocated items**: The agent groups that the agent belongs to.
   - **Unallocated items**: The groups that the agent does not belong to.
2. Under **Unallocated items**, select the checkboxes for the agent groups that you want to add the agent to, and then click the **Add** button + ADD.

2.6 Agent Control Center

2.6.1 Overview

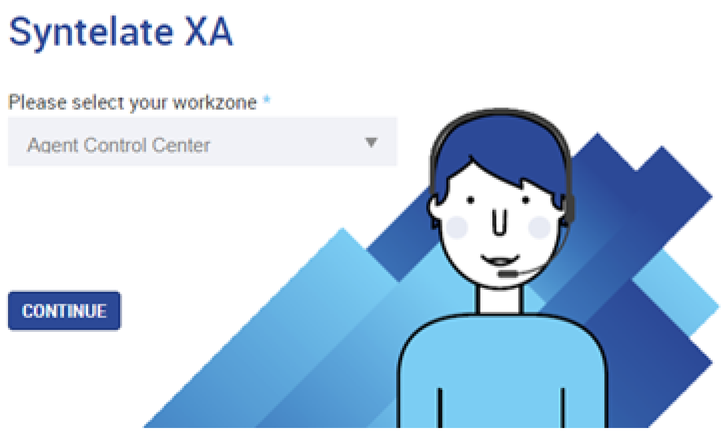
The **Agent Control Center** lets you help agents with their calls and, where required, change their **Agent state**.

The exact specification of the **Agent Control Center** is dependent on the type of telephony system that is integrated with your Syntelate XA implementation. This section provides instructions and guidance on the full range of features available for every telephony system. You might not see every option that's described in this section.

The **Agent Control Center** lets you help agents by giving you the capability to:

- Listen to an agent's call
- Barge into an agent’s call
- Force an agent to go Ready or Not ready
- Force an agent to log out.

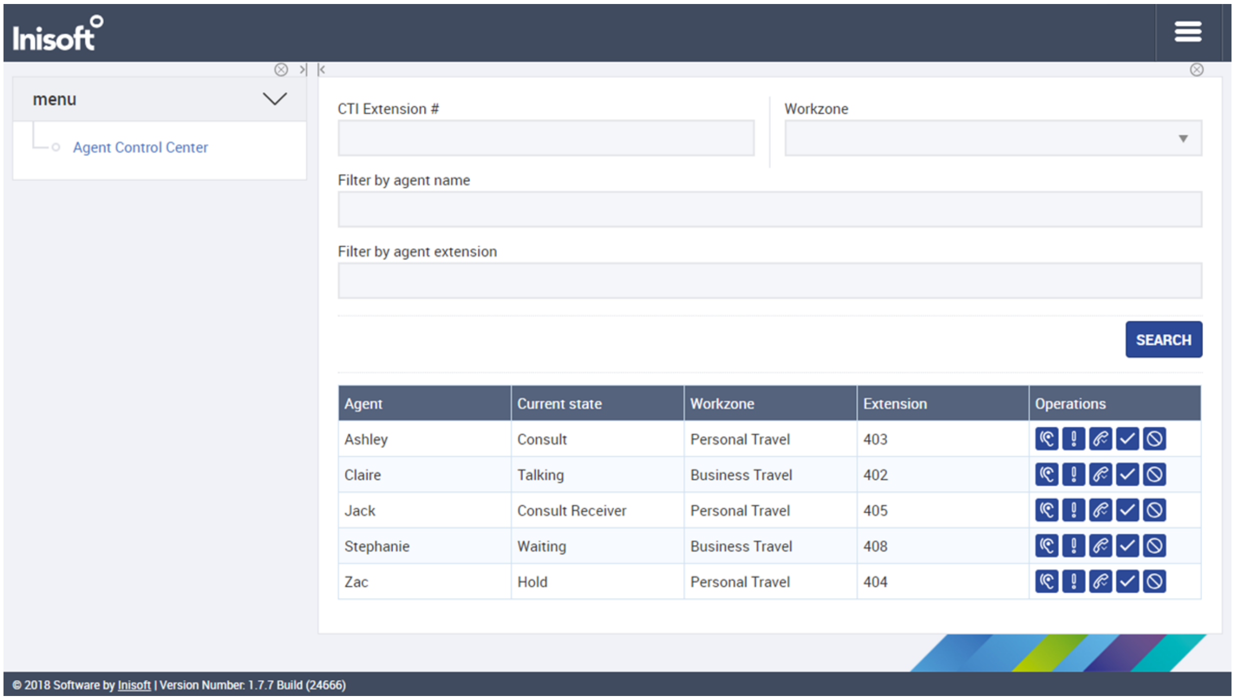
To get started, select the **Agent Control Center** workzone at the login screen.



To get started, log in to your Syntelate XA Configuration Desktop, and select **Agent Control Center** from the **Menu**. Below is a description of the interface and instructions for the operational features.

2.6.2 The Interface

At the top of the **Agent Control Center** pane you see some search options and, under those, a grid.



Here is a description of the interface.

2.6.2.1 CTI Extension

- The **CTI Extension #** field is a required field only when you want to perform a listen, barge or leave operation. Enter your supervisor extension.
- It is not required when you want to force an agent to go ready or not ready.

2.6.2.2 Filter by Workzone

To show only agents in a particular workzone, select that workzone from the **Workzone** dropdown.

2.6.2.3 Filter by Agent Name

To search by agent name, type all or part of an agent's name into the **Filter by agent name** box, and then click **SEARCH**.

> **Note:** If you don't click the **SEARCH** button, the agent list will automatically be filtered at the next three-second refresh.

2.6.2.4 Filter by Agent Extension

To show only agents with a particular phone extension, type all or part of the phone extension into the **Filter by agent extension** box, and then click **SEARCH**.

2.6.2.5 Agent Grid

This grid shows a row for each agent logged in to Syntelate XA. The list of agents updates every three seconds. You can force it to refresh by clicking the **SEARCH** button.

It has the following columns:

- **Agent**: The name of the agent.
- **Current state**: The agent's current state (as of the last three-second refresh), e.g. Talking or Waiting.
- **Workzone**: The workzone that the agent is logged in to.
- **Extension**: The agent's phone extension.
- **Operations**: Shows buttons to listen, barge, leave, force ready or force not ready.

Here is more information on each of the operation buttons.

Listen

- Click to listen to an agent's call when the agent is in the **Talking** state. If the agent is waiting, dialing, ringing, in wrap-up or not ready, you'll see an error message.
- While listening, you track the agent's extension, not the customer's. For example, if the agent transfers the call to another number, you remain listening to the agent (you do not follow the customer).
- You will remain listening to the agent across calls until you choose to leave.
- Multiple supervisors can listen to an agent's call at the same time.

Barge

- Click to barge in to an agent's call when the agent is in the **Talking** state. If the agent is in any other state, you'll see an error message.
- Once barged, both you and the agent will be able to speak with the customer. The agent won't be able to perform any telephony operations except hanging up or clicking a completion button (can't put the customer on hold, blind transfer, etc.).
- If the agent hangs up or completes the call, you will remain connected to the customer.
- If the customer leaves the call while you are barged into it, the call is ended and you are disconnected from the agent.
- You can barge from listening or else go straight to a barge. Also, from a barge, you can move to listening.
- Only one supervisor can barge into an agent's call at a time.

Leave

- Click to leave the call that you are currently listening to or have barged into. The agent remains speaking with the customer. For a barge that the agent has left, **Leave** hangs up the customer.

Force Ready

- Click to force the agent to go ready, where they are currently not ready or pending not ready. If the agent is in any other state, you'll see an error message.

Force Not Ready

- Click to force the agent to go not ready. If the agent's current state is ringing, you'll see an error message.
- If the agent is currently on a call, they will be set to pending not ready rather than not ready. They will be set to not ready upon completion of the call.
- When you force an agent not ready, their not ready reason is set to a system reason called Forced Not Ready. They can manually change their not ready reason by clicking the **Not ready** button and choosing another reason, and they can also go ready again by clicking **Ready**.

Force Log Out

An agent can only be forcibly logged out when they are either:

- Ready and their **Agent state** is **Waiting**; or
- Not ready and their **Agent state** is **Idle**.

If the agent state is **Talking** when you click **Force Log Out**, Syntelate XA displays an alert advising you that the agent is on a call.

2.7 Agent Groups

From the **Agent groups** configuration pane you can:

- Create new agent groups
- Edit or delete existing agent groups
- Allocate agents to agent groups
- Remove agents from agent groups
- Manage priority-based routing for agent groups

2.7.1 Tasks

2.7.1.1 Creating Agent Groups

1. In the **Agent groups** grid, select the **Add** button in the rightmost column. A new row is created with editable fields.

2. In **Group number**, enter a whole number.
3. In **Group name**, enter a name.
4. Click **Save**.

2.7.1.2 Editing Agent Groups

1. In the **Agent groups** grid, find the row you wish to change and select the **Edit** icon in the rightmost column. The existing row becomes editable.
2. Edit the details in **Group number** and **Group name**.
3. Click **Save**.

2.7.1.3 Allocating Agents to Groups

1. Select an agent group in the **Agent groups** grid by clicking anywhere in that group's row. The **Agents** allocation lists underneath the grid update to show:
   - **Unallocated items**: The agents who are not in the group.
   - **Allocated items**: The agents who are in the group.
2. From **Unallocated items**, select the check box for each agent that you want to add to the group.
3. Click the **Add** button 

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2.7.1.4 Removing Agents from Groups

Follow the steps above, but this time look at **Allocated items** and select the check box for each agent who you want to remove from the agent group you've selected in the **Agent groups** grid.

2.7.1.5 Managing Priority-based Routing

Priority-based routing tells Syntelate XA to pass interactions to specific agent groups according to their priority in the **Priority subgroup** grid.

EXAMPLE

Jack manages the Asia-Pacific team at Inisoft Travel. The team handles customer web chats. The team is made up of three agent groups:

- Region Specialists
- Region Guides
- Trainees

Jack wants to make sure that the right group is handling the appropriate type of customer query. So, first, in **Agent groups** he defines the Asia-Pacific group as a parent group and makes sure there is a standard group entry for each of the team's subgroups.

Next, in **Priority subgroups**, he assigns a timeout to each group so that Syntelate XA knows when to pass an interaction to each of them.

Subgroup	Delay time (seconds)
Region Guides	0
Region Specialists	15
Trainees	30

In this example, a delay time of 0 seconds tells Syntelate XA to pass customer interactions to the Region Guides group without delay. If no-one in that group accepts the interaction after a period of 15 seconds, then Syntelate XA passes it to the Region Specialists, and if they are all busy too, and no-one accepts the interaction after 30 seconds, then the customer is passed to the Trainees group.

In effect, the **Delay time** determines the priority of each group.

You can manage priority-based routing rules using the **Priority subgroups** grid.

Here are instructions.

Creating a Priority Subgroup

1. First, you need to add an entry to the **Agent groups** grid for each subgroup that you want to create:

    a. Click **Add** in **Agent groups**. You see a new row appear. Note that **Group number** is read-only.

    b. Enter a name for the new subgroup in the column **Group name**.

c. Ignore the check box in the column **Use Priority Groups** – it's used for parent agent groups, not subgroups.

d. Click **Save**.

2. Next, you need to specify the parent agent group. To do that:

   a. In the **Agent groups** grid, find the relevant group that you want to assign as the parent and click on the row to select it.

   b. Click **Edit**. The cells become editable.

   c. Select the check box in the **Use Priority Groups** column. This establishes a link between the **Agent groups** and **Priority subgroups** grids.

   d. Click **Save**.

3. Now you need to add each subgroup to the **Priority subgroups** grid:

   a. Ensure that the parent group is still highlighted in the **Agent groups** grid. If it isn't, then click on it.

   b. Next, in **Priority subgroups**, click **Add**. A new row appears with editable cells.

   c. From the **Subgroup** dropdown, select one of the newly created subgroups that you need to route interactions to.

   d. In **Delay time (seconds)**, enter a whole number that represents the timeout for when the interaction will cease being passed to the current group and will be passed to the next group. For the first group, enter '0' (zero) to ensure that group will always be passed the interaction first.

   e. Click **Save**.

4. Repeat for each subgroup.

That's it - you have successfully created a priority-based routing rule.

2.8 Email Rules

2.8.1 Overview

Syntelate XA's email rules allow you to automatically perform actions on inbound emails before they reach an agent.

> **Note:** In Syntelate XA version 2.13.0 and above, the definition of inbound email in the context of email rules includes inbound replies to an existing chain. In earlier versions of Syntelate XA, email rules are not applied to inbound replies that are part of a chain.

For example, create a rule to monitor a mailbox for emails containing specific words in the message body and route them to a particular agent group.

The **Email rules** configuration pane displays a grid listing your email rules and their criteria, rule actions, and properties. The rightmost column displays tools for editing, saving, and deleting each rule.

> **Note:** After you create, edit, or delete a rule, you need to activate those changes by restarting the Inbound Message Gateway service.

2.8.2 Criteria

The criteria tell Syntelate XA what information to find in inbound emails. Some criteria accept multiple values.

If you specify multiple values, they will be processed according to Boolean OR logic. This means that only one of the values needs to be present in the inbound email for the rule to be applied.

Some criteria are required, some are optional.

Criterion	Type of input	Description
Mailbox (required)	Dropdown	**Guidance**: Select the mailbox to which the rule should apply. (If you forget to specify a mailbox, the rule will be ignored.) **Result**: The rule will be applied to emails sent to this mailbox. **Note:** To set up an email rule for multiple mailboxes, you must recreate the same rule for each mailbox.
Email address	Text box	**Guidance**: Input all or part of the email addresses that you want this rule to apply to. » Use * as a wildcard character. » The filter is case insensitive. » Separate multiple filters with a semi-colon.

Criterion	Type of input	Description
		Note: *hotmail* will match on all email addresses from hotmail domains, such as @hotmail.com and @hotmail.co.uk. While *@inisoft.co.uk will match on all email addresses from the domain @inisoft.co.uk. EXAMPLE *hotmail*; *@inisoft.co.uk; *yourcompanydomainname*; **Result**: Matched inbound mail messages will have the rule applied to them.
Contact list	Text box	Checks if the sender's email address is on the specified list of contacts. Use when you want to check if a sender's email address already exists in your database. (Compare with **Email address**.) **Guidance**: Enter the names of the relevant database table and field, concatenated by a full point. EXAMPLE VIPCUSTOMERS.EMAILADDRESS Where VIPCUSTOMERS is the name of a table in

Criterion	Type of input	Description
		your database, and EMAILADDRESS is the field that stores the VIP customers' email addresses. **Result**:Syntelate XA searches the specified field for a matching email address.
Subject	Text box	Checks if the **Subject** of the inbound email contains the specified values. **Guidance**: Enter the words or fragments that you want Syntelate XA to find in the subject of inbound emails. » Use * as a wildcard character. » The filter is case insensitive. » Separate multiple filters with a semi-colon. **Result**: Any matched inbound emails will have the email rule applied to them.
Body	Text box	Checks if the body of the inbound email contain the specified values. **Guidance**: Enter the text that you want Syntelate XA to find in the body of the inbound email. » Use * as a wildcard character. » The filter is case insensitive.

Criterion	Type of input	Description
		» Separate multiple filters with a semi-colon. **Result**: Any matched inbound emails will have the email rule applied to them.

2.8.3 Rule Actions

Specify the actions that you want the rule to perform on the mail messages that match your criteria.

Rule actions	Type of input	Description
Agent group	Dropdown	**Guidance**: Select an agent group to assign to the inbound email. **Result**: The Worklist Engine will pass the interaction record to an agent in this group and Syntelate XA will update the LKTL_AGENTGROUPNO field of the interaction record. If no agent group is specified, and a match is found, then the mail message is added to the default agent group mail queue. **Tip:** The default agent group mail queue is set using mailbox preferences. Those are created in Studio when the email message gateway is first set up. Usually, Studio is configured by a **technical user**. If you need to change the default agent group mail queue,

Rule actions	Type of input	Description
		you should speak to your manager.
Auto-reply	Text box	**Guidance**: Enter the snippet **Number** for the snippet that you want to be inserted into the body of the email message. **Tip:** Use the Snippets grid provided on the **Email rules** pane to find a snippet number. The grid shows you a preview of the snippet content, too. **Result**: The snippet will be inserted into the body content of the auto-reply email, which will be sent whenever the inbound emails match the conditions specified in the rule. **Note:** Whenever a snippet is used, its number is recorded in the LKTL_SNIPPETS field of the INTERACTION_X table.
Major reason	Dropdown	**Guidance**: Select a major reason to assign to the inbound email. **Result**: Sets the MAJORREASON field of the interaction record.
Minor reason	Dropdown	**Guidance**: Select a minor reason to assign to the

Rule actions	Type of input	Description
		inbound email. **Result**: Sets the MINORREASON field of the interaction record.
Priority	Text box	**Guidance**: Enter a number from 1 to 99, where 1 represents the highest priority level. **Result**: Sets the LKTL_CBPRIORITY field of the interaction record. All emails that the rule applies to will be assigned this priority. Syntelate XA's Worklist Engine uses the priority to decide which interaction records to pass agents next.
Set complete	Checkbox	**Guidance**: Select the checkbox to mark the email as complete. **Result**: If selected, the setting updates the LKTL_COMPLETED field of the interaction record to **true**.
Completion code	Dropdown	**Guidance**: Select a completion code to assign to the email. **Result**: Updates the LKTL_COMPLETECODE field of the interaction record.
Email rules field	Grid	**Guidance**: Tell Syntelate XA to insert data into the interaction record for the email. For example, you could use this to create an email rule that automatically updates an interaction record when a customer asks to

Rule actions	Type of input	Description
		unsubscribe from a mailing list. To do that, create an email rule that looks for the keyword "unsubscribe" in the subject line of incoming mail, and add a field called `UNSUBSCRIBE` to **Email rules field**, and give it a value of `Y`. **Result**: Updates the specified field of the interaction record.

2.8.4 Properties

Rules have properties that determine in what order they run, how often they run, and under what condition they stop running.

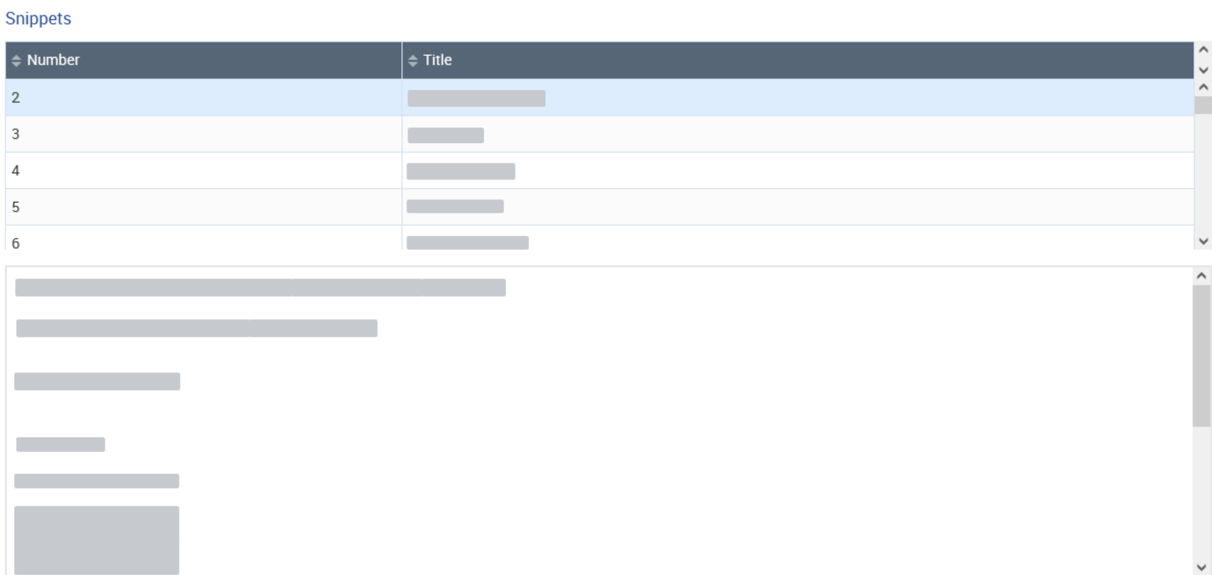
Property	Type of input	Description
Sequence	Text box	**Guidance**: Enter a number representing the order in which this rule should be run in relation to your other rules (if any). You can use any number, e.g., 1, 25, 73, 100, 500, etc. **Result**: Rules with a lower sequence number will be run before those with a higher sequence number. **Note:** If you have two rules and each specifies different values for the same settings, the rule with the higher sequence number overrides the setting made by the rule with a lower sequence number.

<table>
<tr><th>Property</th><th>Type of input</th><th>Description</th></tr>
<tr><td>Always run</td><td>Text box</td><td> Guidance: Enter true or false. Use in conjunction with Auto-reply when you need to set up auto-reply email messages. Result: If true, then this rule will run continually. If a match is found, the other actions specified in the rule are run, and the rule will check new incoming mail messages. </td></tr>
<tr><td>Stop on match</td><td>Text box</td><td> Guidance: Enter true or false. This action tells Syntelate XA to stop processing subsequent email rules when any condition in this rule is matched. (Obviously, if you only have one rule, you won’t need this action. It’s designed to provide control over the processing of multiple rules.) Result: If set to true, if the rule matches an inbound mail message, Syntelate XA stops processing any subsequent rules, and the other actions specified by the rule are performed. Note: If no rule specifies an agent group, then after the Stop on Match action is performed, the mail message is added to the default agent group mail queue. Be aware that, where specified, the Sequence and Priority properties will affect the agent group mail queue destination if Stop on match is enabled and one of the rules specifies an agent group. </td></tr>
</table>

> **Warning:** If you delete an email rule, it is permanently gone and cannot be retrieved. If you accidentally delete one that you need, you must recreate it.

2.8.5 Snippets Grid

The **Snippets** grid is a reference aid for use when specifying a snippet to use in **Auto-reply**. Use the grid to find the **Number** and **Title** of a snippet and view a preview.



> **Tip:** See the section on Snippet Editor in the PDF Guide, *Syntelate XA - Studio* to learn more about Syntelate XA snippets.

2.8.6 Adding an Email Rule

Here are the steps for adding a new email rule.

1. Go to the **Mailbox** dropdown.
2. Select a mailbox to apply the rule to.
3. Go to the **Email Rules** grid.
4. Scroll the grid to the right. At the end of the header row you see the editing tools column.
5. Click the **Add** button. You see a new row appear. The fields are blank, ready for you to input settings.
6. When you've input all the settings that you need, scroll the row to the rightmost end of the grid. Click the **Save** icon.

You have successfully added a new email rule.

2.8.7 Editing an Email Rule

The process for editing email rules is similar to creating new ones (see Adding an Email Rule on the previous page).

Here are the steps for editing an existing email rule.

1. In the **Email rules** grid, click on the row for the rule you wish to edit. It turns blue.
2. Scroll the **Email Rules** grid to the right. You see the editing tools column.
3. **If you need to edit a rule:** Click the **Edit** button. You see the values in each cell become editable.
4. After you have made all your changes, remember to click the **Save** button at the end of the row.

If you need to remove a rule, use the **Delete** button next to **Save**.

> **Warning:** If you delete a rule, it is deleted permanently and cannot be retrieved. If you accidentally delete a rule, you need to recreate it.

2.9 Expired Messages

2.9.1 Overview

The **Expired Messages** configuration pane is for managing expired WhatsApp messages.

2.9.2 Concepts

In WhatsApp Business, user-initiated messages must be replied to within a 24-hour customer service window. If a message is not answered within that window, the message expires. In Syntelate XA, expired messages are not passed to agents, but the messages remain in Syntelate XA and must be completed.

2.9.3 Tasks

Use the **Expired Messages** configuration pane to find and complete any expired messages. When you complete an expired message, the interaction record for the message is made inactive.

Note: If a customer's initial message expires and they subsequently send a second message, the third-party solution provider passes Syntelate XA both the expired message and the new message. Then, Syntelate XA assigns both messages to a new interaction record. As a result, an agent can view the complete interaction history of the customer.

2.9.4 See Also

For more information about the WhatsApp Business integration with Syntelate XA, seeSyntelate XA - Overview of Channels.

The customer service window is defined by WhatsApp Business. For more information about how Facebook manages the WhatsApp Business response window, see the WhatsApp topic of the Meta for Developers portal.

2.10 Inbound Email Queue

Use the **Inbound email queue** configuration pane to manage incomplete email interaction records.

From here you can:

- Tell Syntelate XA to pass an email to a specific agent.
- Tell Syntelate XA to pass an email to another mailbox.
- Mark an email as spam, which closes it, too.
- Remove emails that don’t need a response.

Use the search options displayed at the top of the pane to filter the queue.

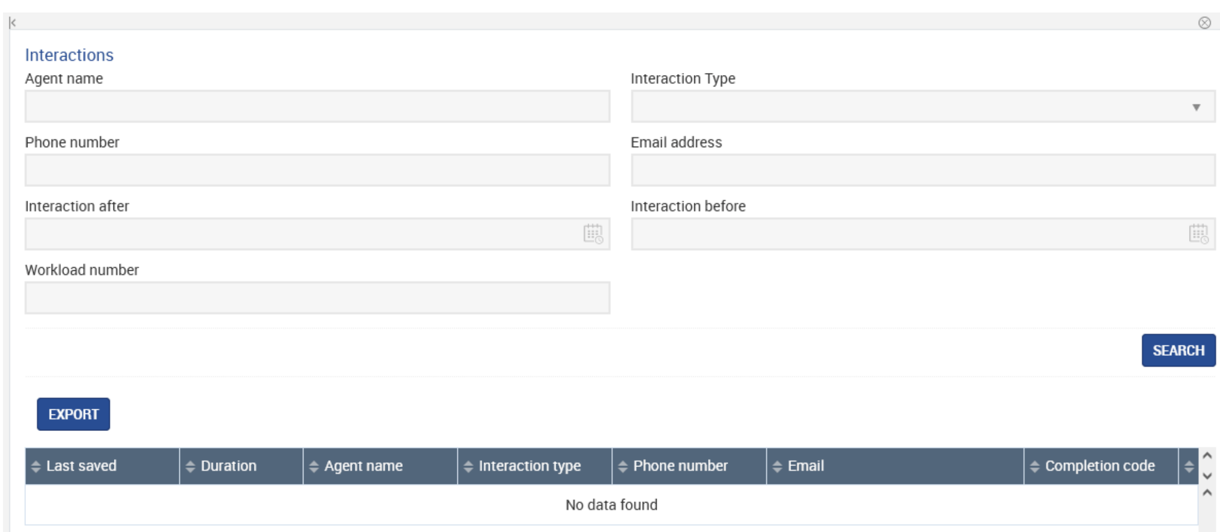
Results are displayed in a grid below the search options. Scroll the grid to the right to find the following options:

- The **Edit** button: specify a mailbox and/or agent to direct the email to.
- **SPAM** button: mark the email as spam and remove it from the queue.
- **NO REPLY REQ.** button: mark the email as no reply required and remove it from the queue.

By default, the transcript for the first search result in the grid will be displayed in **Email Message**. To view the transcript of any other result, simply select the email record in the grid and you see **Email Message** refresh, showing the selected email's transcript.

2.11 Interaction Search

The **Interaction Search** pane of the Syntelate XA Configuration Desktop is where you can find past interactions and view the history of the conversation between the agent and the customer. You can also export some of the data for use in reporting.

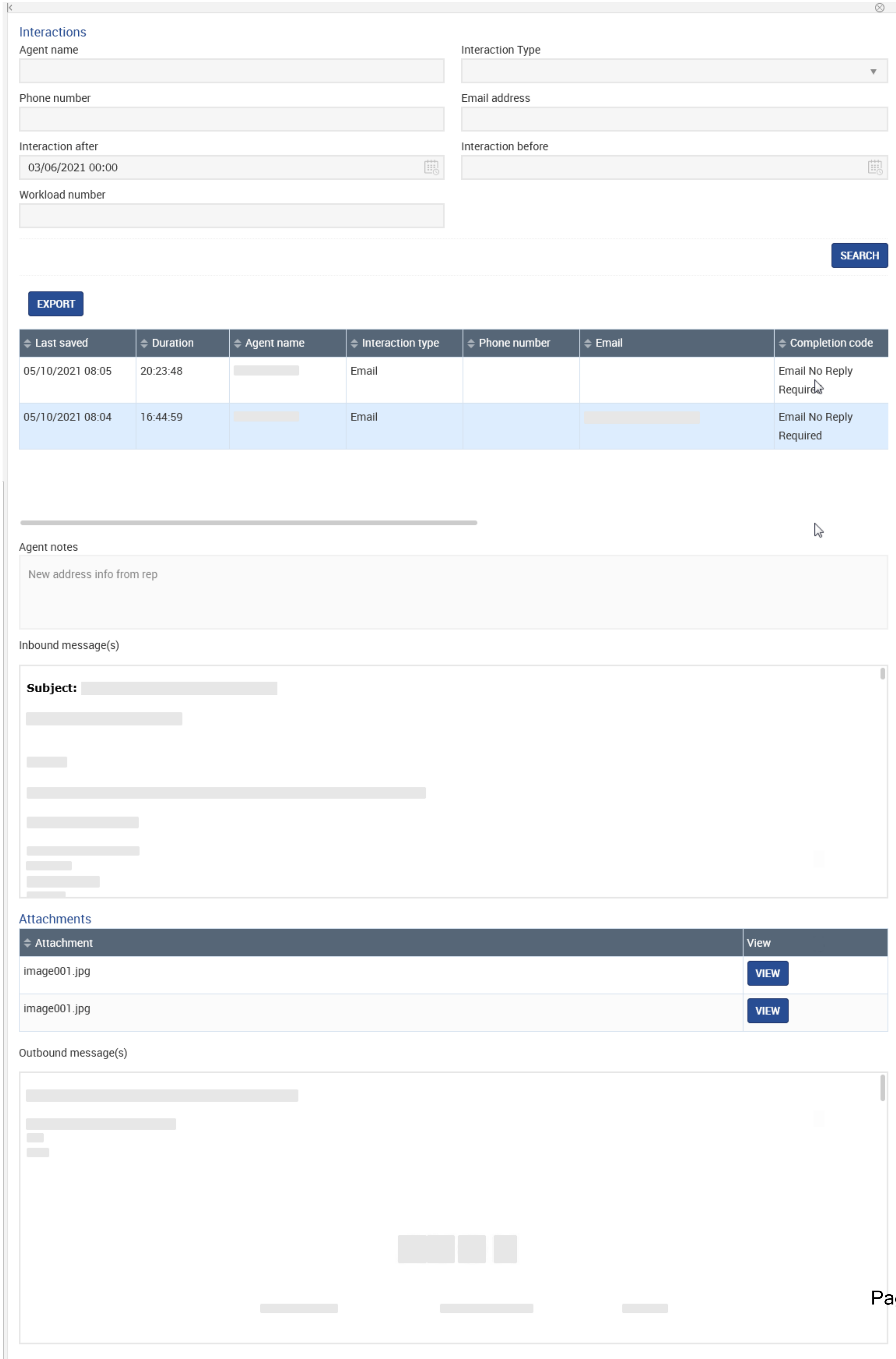


The pane provides text boxes for you to enter some search criteria and a grid to display the results. The **EXPORT** button sends the grid data to an Excel spreadsheet.

If you select a result in the grid, you see additional information show underneath; for example, if you search for an email interaction and then select it in the grid, you will see the following:

- Agent notes
- Interaction transcripts
- Attachments

Those additional details will be displayed below the grid. You can print the additional information using the **PRINT** button provided.


Interactions
Agent name
Interaction Type
Phone number
Email address
Interaction after
03/06/2021 00:00
Interaction before
Workload number
SEARCH
EXPORT
Last saved
Duration
Agent name
Interaction type
Phone number
Email
Completion code
05/10/2021 08:05
20:23:48
Email
Email No Reply Required
05/10/2021 08:04
16:44:59
Email
Email No Reply Required
Agent notes
New address info from rep
Inbound message(s)
Subject:
Attachments
Attachment
View
image001.jpg
VIEW
image001.jpg
VIEW
Outbound message(s)

> **Note:** You cannot export the additional information, but you can print it.

2.12 Major and Minor Reasons

From the **Major and minor reasons** configuration pane you can manage the codes provided to agents for use when they disposition an interaction.

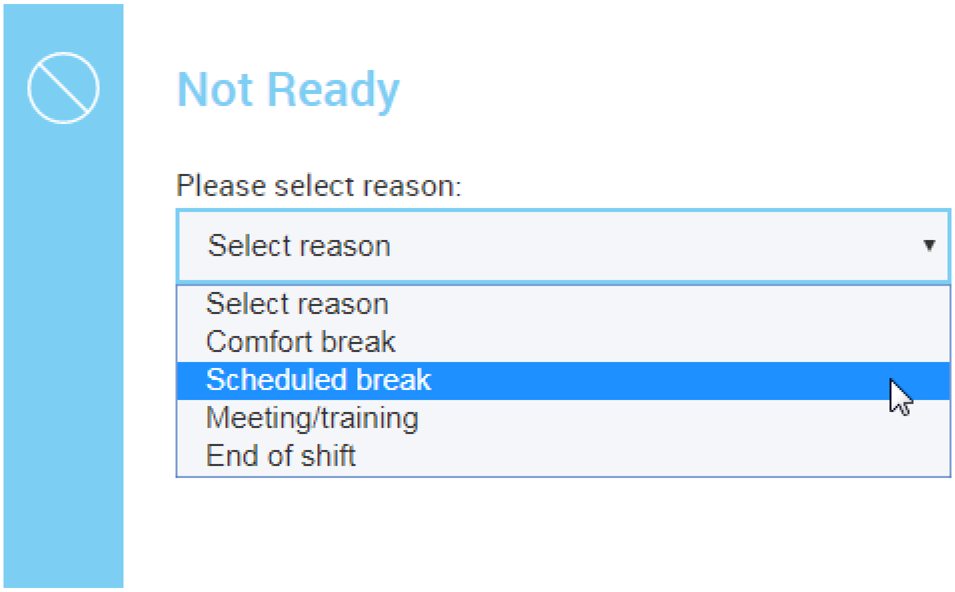
The codes are displayed in a grid. Use the rightmost column to add or edit a code.

Depending on your organization's implementation of this configuration pane, the codes may have properties that tell Syntelate XA other information. Examples could be:

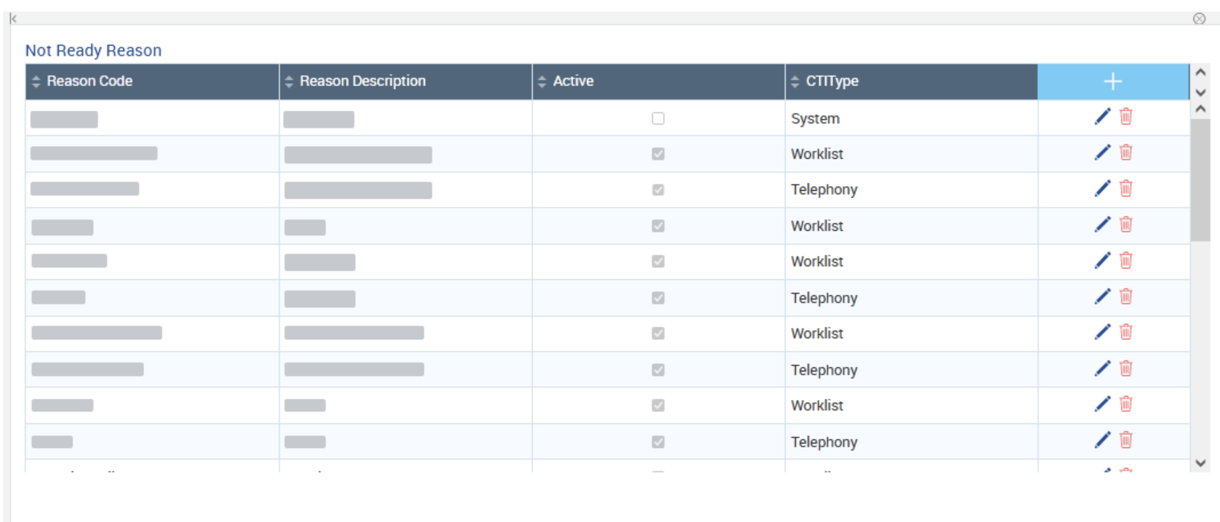
- A description of the code's purpose
- Whether the code is active or inactive
- The display order of the codes in the dropdown list on the Syntelate XA Agent Desktop.

2.13 Not Ready Reasons

When an agent goes **Not ready** in Syntelate XA, they see the **Not Ready** dialog, which asks the agent to submit a reason for going not ready.



These reasons are called **not ready reasons**. You can add, edit, and delete the not ready reasons by using the **Not Ready Reasons** configuration pane. Here is a screenshot of the configuration pane:



To create or edit a not ready reason, follow the guidance below:

- **Reason Code**: The reason codes are not visible to the agent. Enter a unique word or alphanumeric string that indicates a business reason for ending a session, such as Break, Lunch, Training, Meeting, etc. If you are using the Agent Control Center, you need to add the codes **ForcedBreak** and **ForcedNotReady**.

> **Warning:** The reason code Worklist is reserved: do not create a reason code called Worklist!

- **Reason Description**: Enter a description to be displayed in the dropdown list to the agent when they go Not ready. In some cases, the description could be the same as the code itself, for example, Lunch could be both the code and description.

- **Active**: Select or deselect the check box to determine whether the reason should be displayed in the dropdown or not.

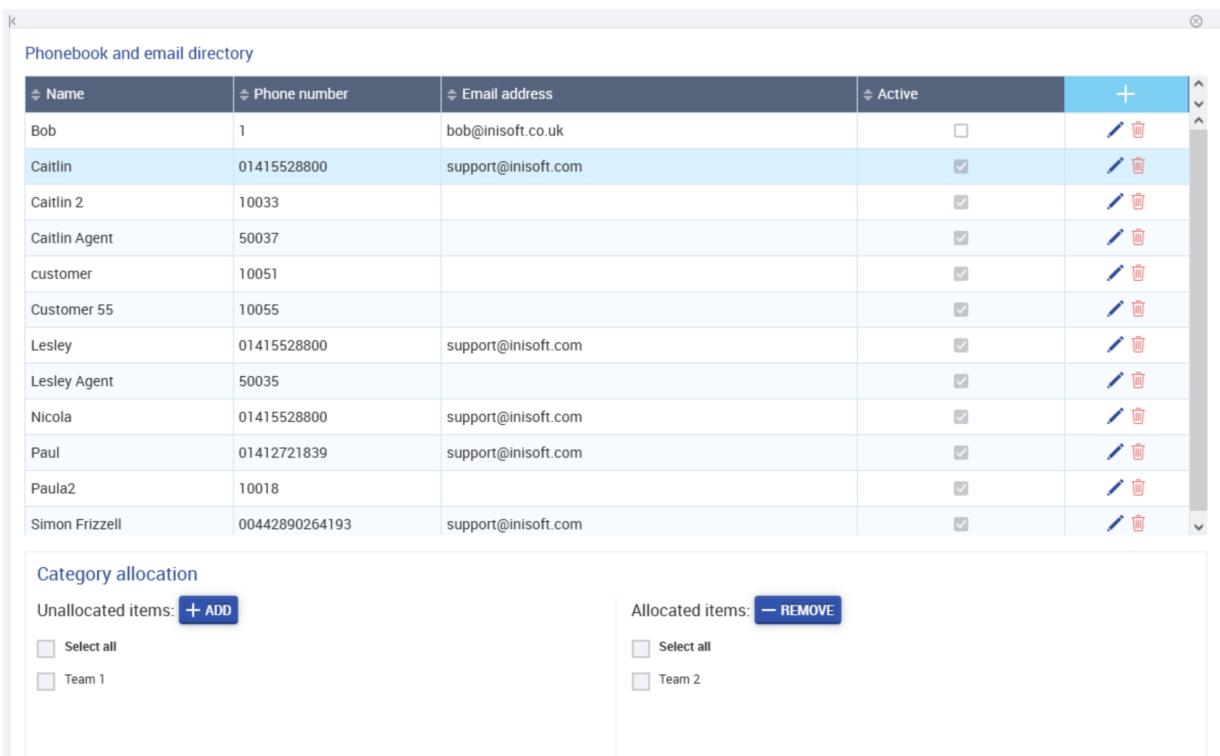
- **CTI Type**: Valid values are Telephony, Worklist and System. Set CTITYPE to Telephony if the not ready reason will be used on a third-party telephony channel (TSAPI, IP Office, POM, etc.). Set it to Worklist if the reason will be used on other channels. Set it to System for the not ready reason codes **ForcedBreak** and **ForcedNotReady** if you are using the Agent Control Center.

- **Aux Code**: This column is only displayed in TSAPI implementations. Syntelate XA passes this aux reason code to TSAPI when the agent's state is set to not ready. The aux code is an integer. You can check which aux code to use by looking for the aux code shown in your Avaya Aura® Communication Manager. The aux code you enter needs to be identical to the one in Avaya Aura® Communication Manager.

Note: The **Not ready reasons** are stored in the database table CTINOTREADYREASONS. Each column in the **Not ready reasons** grid corresponds to a field in the database table. You can edit the reasons either directly in the database or from the **Not ready reasons** configuration pane.

2.14 Phone and Email Directory

Use the **Phone and email directory** configuration pane to create a phone and email directory for agents to use on their Syntelate XA Agent Desktop. In addition, you can use this pane to allocate categories to a contact.



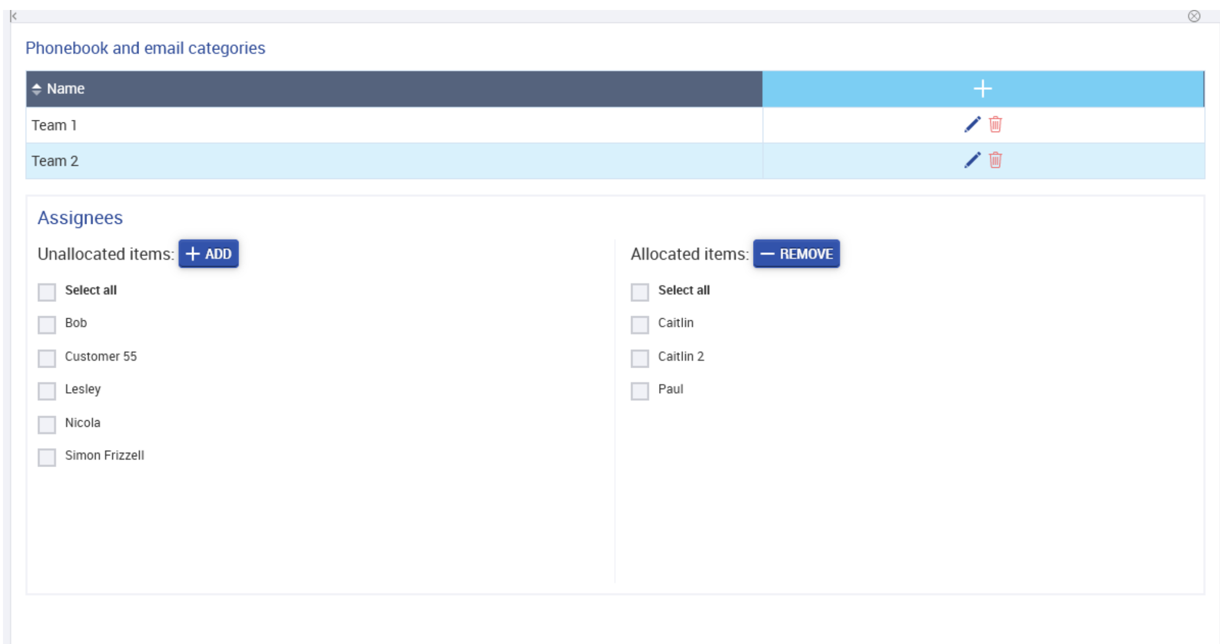
Use the grid to **Add** and **Edit** directory contacts.

Underneath the grid, you see the **Directory categories** allocation lists. Use those to allocate categories to a single contact, or to see which categories a contact belongs to.

Note: If you want to add or edit the details of a directory category, or quickly see all the contacts who belong to a single category, use the Phone and Email Categories below pane instead.

2.15 Phone and Email Categories

Use the **Phone and email categories** configuration pane to create categories for the phone and email directory that agents use on their Syntelate XA Agent Desktop. In addition, you can manage which directory contacts belong to each category.



Use the grid to **Add** and **Edit** directory categories.

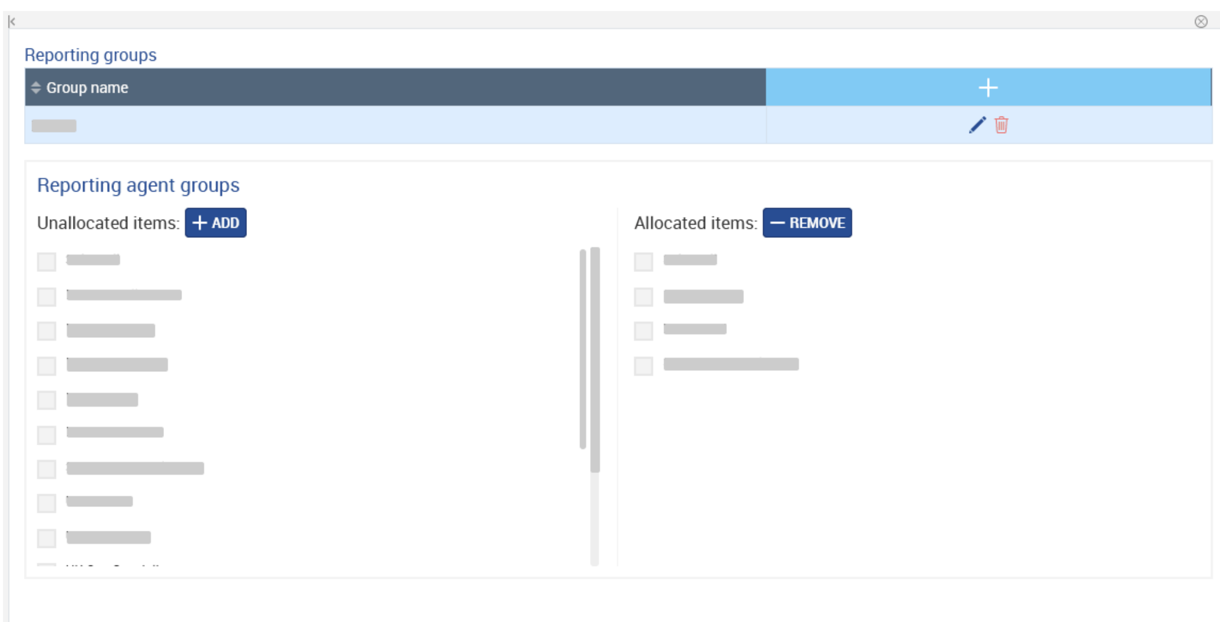
Underneath the grid, you see the **Phone and email directory** allocation lists. Use those to allocate multiple contacts to a category, or to see which contacts are allocated to an existing category.

> **Note:** If you want to add or edit the details of a directory contact, or quickly see all the categories allocated to a specific contact, use the Phone and Email Directory on page 43 pane instead.

2.16 Reporting Groups

2.16.1 Overview

The **Reporting groups** pane lets you manage the agents to include in the Current Agent States on page 63 report on the Syntelate XA Dashboard Desktop.



2.16.2 Creating a Group

1. In the **Reporting groups** grid, click the plus button to add a new row.
2. Enter a name for the group. The **Group name** can be anything; it does not impact on functionality. You see the newly created reporting group appear in **Unallocated Items**.
3. In the **Reporting groups** grid, click on the row that you have just created, so that it is highlighted. This ensures that when you allocate the agent group to a reporting group, you're allocating it to the intended one.
4. In **Unallocated Items**, select the agent groups you want to add to the reporting group.
5. Click the **+ ADD** button. You see the agent groups appear in **Allocated Items**.

The allocation lists let you add or remove any agent group from any reporting group.

You can create as many reporting groups as you need.

2.16.3 Also See

You might find it helpful to see how you can manage Agents on page 10 and Agent Groups on page 19, too.

2.17 Sensitive Data

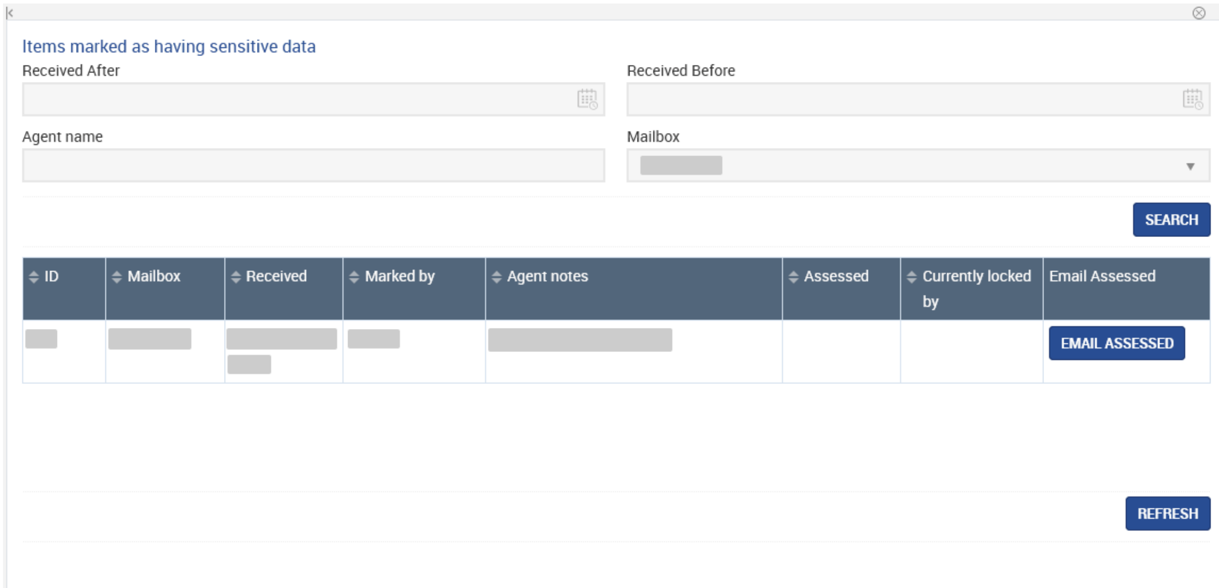
When an agent flags an email as containing sensitive data, it must be assessed by a supervisor before it can be closed. The **Sensitive data** pane lets you assess and take action on those emails.

A single email interaction record often consists of multiple emails, for example, the customer's inbound emails and the organization's outbound emails. So when an agent marks an email as containing sensitive data, the whole interaction record will be marked for assessment. You can easily assess each email in the chain of any marked interactions by using the features on the **Sensitive data** configuration pane. And, you can delete any sensitive attachments.

> **Note:** When you edit an email, you're editing the version of it that is stored in the Syntelate XA database.
>
> However, deleting an attachment does not delete the file from the Syntelate XA database. Instead, deleting simply removes the reference in the Syntelate XA database to the file's location. This prevents a Syntelate XA user from being able to open the file from Syntelate XA.

2.17.1 Finding Marked Interactions

To find marked interactions, enter search terms into the **Received after**, **Received before** and **Agent name** boxes. Click **SEARCH**.



Tip: You can type part or all of the agent's name in the Agent name box. Typing "Paul" would retrieve emails by an agent called "Paul" but also by agents called "Paula", "Pauline", etc.

In other words, Syntelate XA accepts approximate search strings. This is a process commonly referred to as fuzzy search. It looks for strings that match a search term approximately instead of exactly. Fuzzy searches help you find relevant results even when your search terms are misspelled.

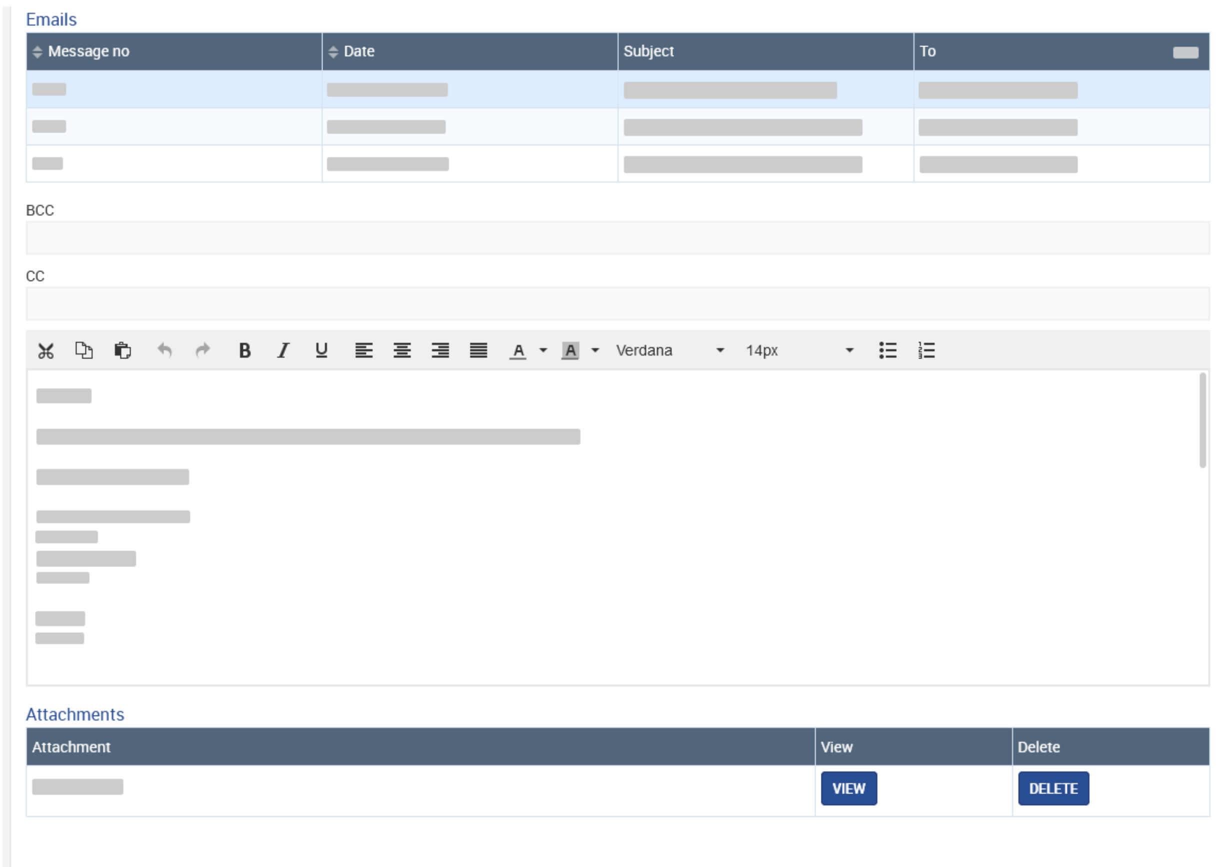
In order to see the contents of each email in the interaction record, follow the steps below.

2.17.2 Viewing the Contents

- From the search results grid, select an interaction record by clicking on it. Doing so will display the full chain of emails in the **Emails** grid underneath.
- Select each email in turn to see its transcript and any attachments included.

2.17.2.1 Removing Sensitive Data from the Body of an Email

- After you've retrieved the email, use the HTML editor to manually delete any sensitive data.



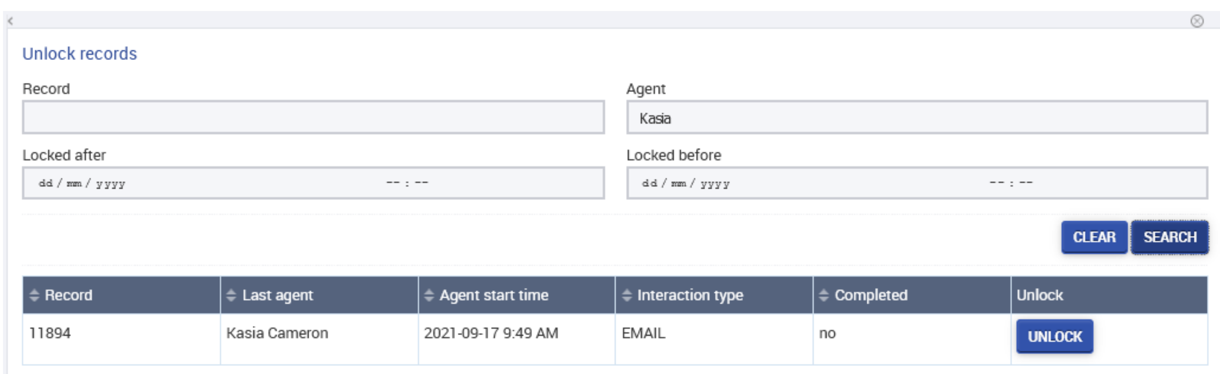
- You have the option to delete attachments:
  - Click **VIEW** in the attachments grid to open the attachment. View it to assess if it contains sensitive data. Next, click **DELETE**.
- When you have reviewed the sensitive content in the body and any attachments, click the **EMAIL ASSESSED** button to close the interaction record.

2.18 Unlock Records

The **Unlock records** configuration pane lets you manage locked email interaction records.

Email interaction records in Syntelate XA are locked to an agent when the agent is in the process of handling that email. In the rare event of the agent not being able to finish handling the email, (for example, they are interrupted by an emergency, they need to attend a mandatory meeting, or they accidentally left the record incomplete, etc.), then the record locks to that agent. The result is that neither the agent nor anyone else can work on the email, and the customer's email will be unanswered.

To prevent that outcome, a supervisor can use the **Unlock records** pane to manually unlock the relevant email interaction record. Once the record is unlocked, Syntelate XA can pass it to another agent.



2.19 Voice of the Customer Feedback

2.19.1 Overview

Voice of the Customer is a module in Syntelate XA that sends a survey to the customer after a chat or email. Voice of the Customer is installed by the Inisoft consultant for your Syntelate XA project. Once installed, the results of the survey and the transcript of the associated interaction can be viewed in **Voice of the Customer Feedback**.

Sometimes when a customer submits feedback, they also ask you to get in touch with them. You can find and manage those follow-up requests in **Voice of the Customer Feedback**, too.

Voice of the Customer Feedback provides the following:

- Search
- Transcripts
- Follow-up

2.19.2 Searching for Feedback

1. To get started, enter some search terms in the search boxes.
2. Click **SEARCH**. Results appear in the grid underneath.
3. Select a result to view its details, which will be displayed underneath the grid. What details you see will depend on the design of your survey. However, the details might include:

- The customer's personal contact details
- The customer's feedback scores
- Any comments the customer might have left
- Requests for a follow-up contact
- The details of completed follow-up calls (who completed it and when it was completed)
- For completed follow-ups, the notes left by the supervisor who completed the call.

2.19.3 Completing Follow-up Requests

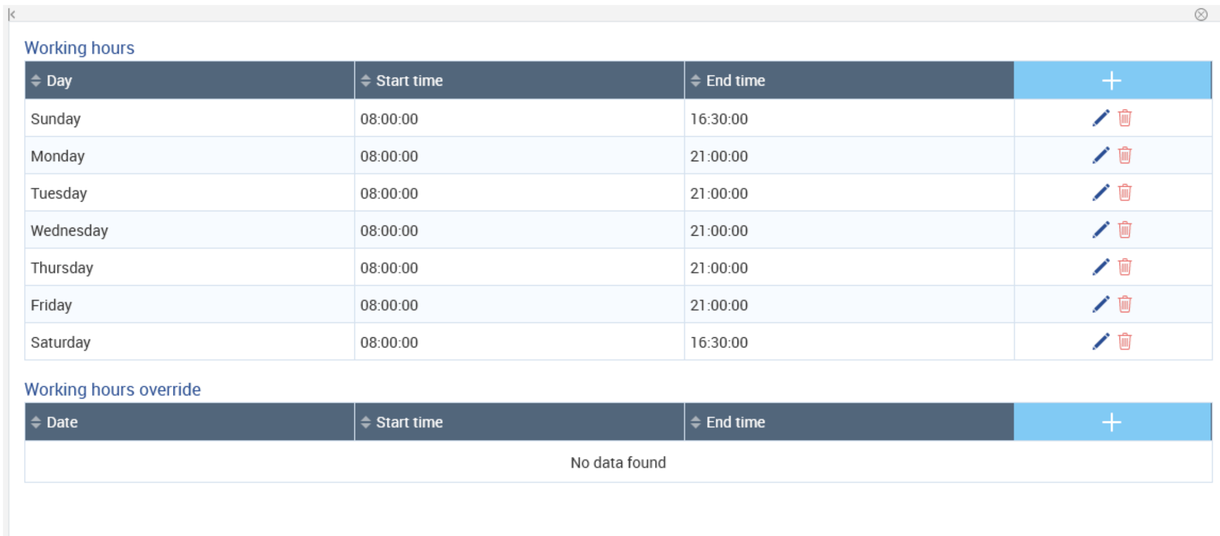
If the customer has requested a follow-up and you want to pick up that request, you need to manually dial their contact number that's provided in the Follow-up form on **Voice of the Customer Feedback**.

During the call, you should enter comments in **Agent notes** to share insights into how the conversation went.

When the call is over, click the **COMPLETE FOLLOW-UP** button to complete and close the interaction record. Syntelate XA saves your agent name and the date and time of the follow-up to the interaction record.

2.20 Working Hours

The **Working hours** configuration pane lets you specify operational hours, and those hours set the limits for the service level agreement (SLA) calculations used by email reporting.



Working hours

Day	Start time	End time	+
Sunday	08:00:00	16:30:00	
Monday	08:00:00	21:00:00	
Tuesday	08:00:00	21:00:00	
Wednesday	08:00:00	21:00:00	
Thursday	08:00:00	21:00:00	
Friday	08:00:00	21:00:00	
Saturday	08:00:00	16:30:00	

Working hours override

Date	Start time	End time	+
No data found			

After you have provided the operational hours in the **Working hours** configuration pane, you will be able to view SLA information in the email reports on your Dashboard Desktop on the next page.

The configuration pane displays two grids. Here is a description of them.

The **Working hours** grid provides columns for the following:

- **Day**: Enter the day, for example, Monday.
- **Start time**: Enter the start time in 24-hour format.
- **End time**: Enter the end time in 24-hour format.
- **Editing tools**: Click the **Add**, **Edit** or **Delete** icons to create and manage entries.

The **Working hours overrides** grid is where you specify holidays and other exceptions, such as a training hour. The columns are the same as those in the **Working hours** grid.

3. Dashboard Desktop

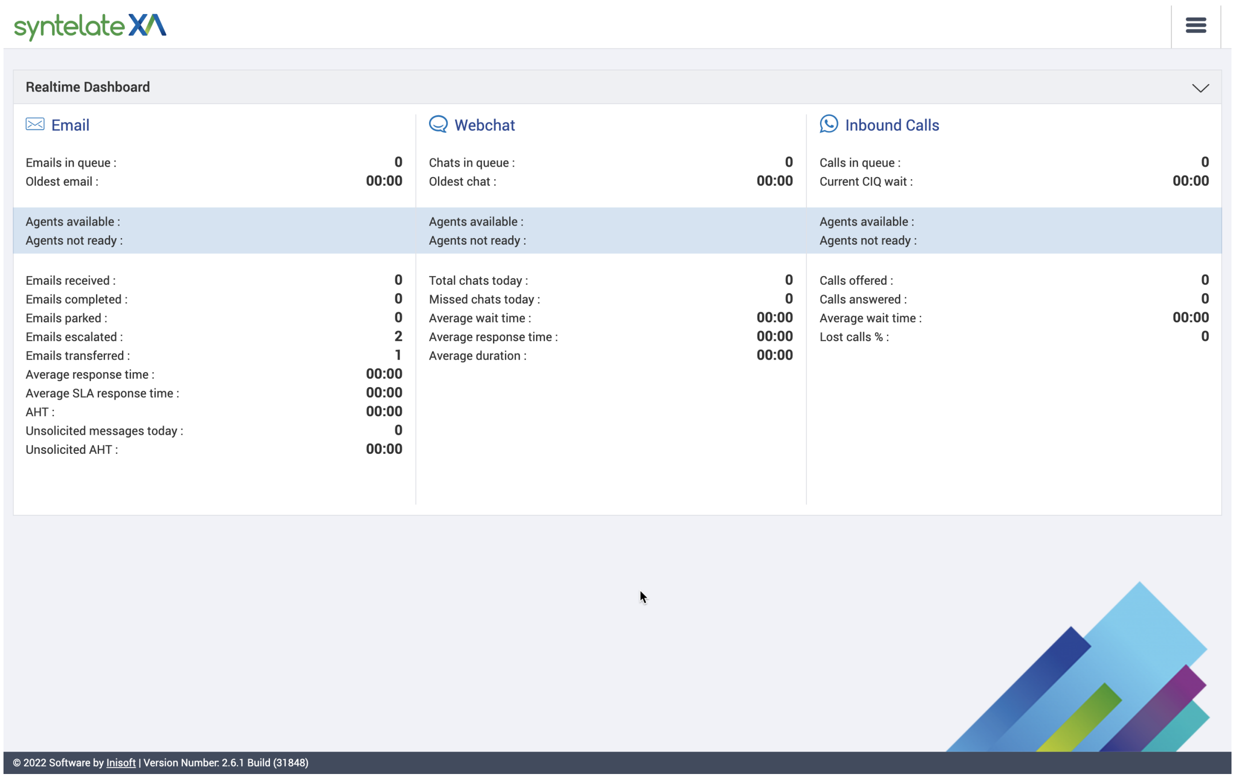
3.1 Overview

This document describes the Syntelate XA Dashboard Desktop, which provides dashboards and reports on activity in Syntelate XA.

3.2 Concepts

3.2.1 Dashboards

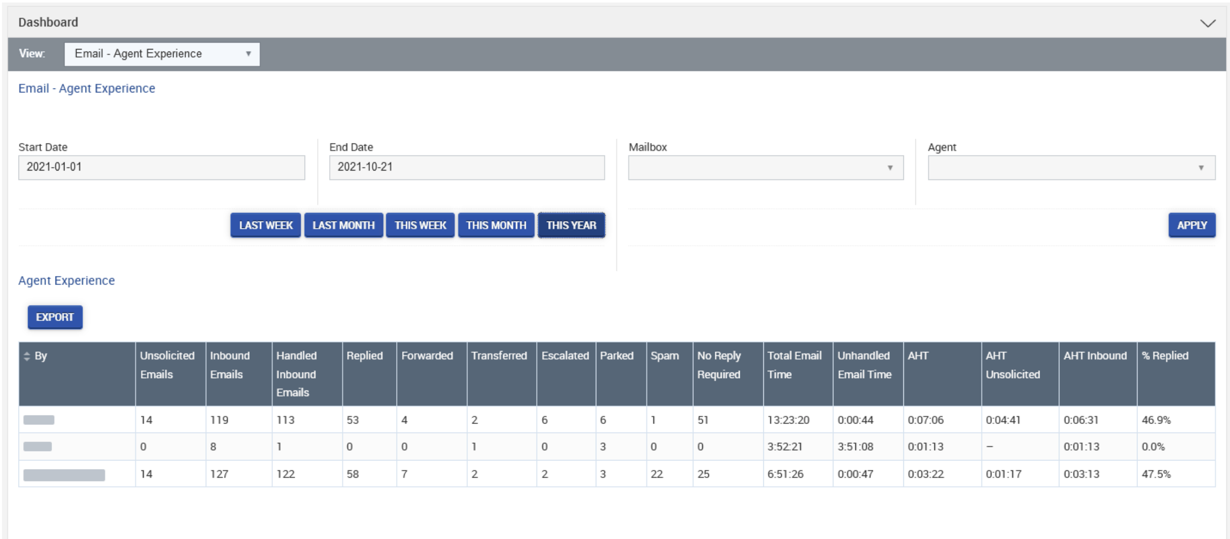
Syntelate XA dashboards present an overview of real-time activity across your contact center.



Typically, a dashboard can't be filtered. Compare with reports.

3.2.2 Reports

Syntelate XA reports present detailed data on historical activity across your contact center.



By	Unsolicited Emails	Inbound Emails	Handled Inbound Emails	Replied	Forwarded	Transferred	Escalated	Parked	Spam	No Reply Required	Total Email Time	Unhandled Email Time	AHT	AHT Unsolicited	AHT Inbound	% Replied
	14	119	113	53	4	2	6	6	1	51	13:23:20	0:00:44	0:07:06	0:04:41	0:06:31	46.9%
	0	8	1	0	0	1	0	3	0	0	3:52:21	3:51:08	0:01:13	–	0:01:13	0.0%
	14	127	122	58	7	2	2	3	22	25	6:51:26	0:00:47	0:03:22	0:01:17	0:03:13	47.5%

Reports can be sorted, filtered, exported, and summarized. See Features to find out more.

3.3 Features

3.3.1 Formats

Reports can be displayed in one or all of the following formats:

- **Table**: can be filtered, sorted, summarized, and exported.
- **Line graph**: can be searched; is interactive, additional data is displayed on hover or on click.
- **Bar chart**: can be searched; is interactive, additional data is displayed on hover or on click.

> **Tip:** A graph or chart report can be accompanied by a tabulated report of the same data, too.

3.3.2 Sorting Reports

Tabulated reports can have sortable columns.

3.3.3 Filtering Reports

Filters let you adjust the report according to certain parameters. For example, to create a report showing channel activity on WhatsApp for the sales campaign between Monday and Sunday.

Filters can be provided for all formats of report (table, graph, chart).

Typical search filters include, but not exhaustively:

- Custom date range
- Fixed date ranges (week, month, year)
- Mailbox
- Campaign
- Channel
- Agent name

Those are just a few examples. Filters can be added for any data that exists in your report's data source.

3.3.4 Exporting Reports

Tabulated reports can be exported by clicking the **EXPORT** button that is displayed next to all tabulated reports. (Graphs and charts cannot be exported.)

- The export generates a spreadsheet in Microsoft Excel format.
- By default, exports are limited to 1000 rows. (The limit can be increased to suit requirements.)

3.3.5 Report Summarizer

Report Summarizer is a Syntelate XA connector that enables Syntelate XA Dashboard Desktop users to generate executive summaries of reports. The summaries are powered by OpenAI.

3.3.5.1 How it Works in Syntelate XA

The **Report Summarizer** connector can be switched on or off by changing the setting AllowGenReportBtn in the Syntelate XA database table, GENERAL.

When **Report Summarizer** is switched on, a **GENERATE SUMMARY** button is displayed underneath each tabulated report on the dashboard desktop. Users can click the button to see an executive summary of the report. The summary is output to a text box and can be copied to the clipboard.

3.3.5.2 Language Support

Generated summaries are displayed in the language that is specified in the user's language setting in Redis.

3.3.5.3 Tokens

The Azure OpenAI API operates a token system for using its API. The Syntelate XA **Report Summarizer** connector controls the usage of tokens by restricting the number available each month. The balance resets each month and unused tokens are not carried over. The number of tokens used to generate a summary depends on the size of the report. If a user clicks **GENERATE SUMMARY** but there aren't enough tokens to do so, Syntelate XA displays a warning message and cancels the request.

3.3.5.4 Implementation

If you would like to use this feature, contact Inisoft Support at +44 (0)800 668 1290 or support@inisoft.com.

3.3.6 Reporting Periods

All formats of report (table, graph, chart) can be filtered by the following date range options.

3.3.6.1 Custom Range

You can apply any start and end date by using the date pickers (text boxes with calendars).

3.3.6.2 Week to Date

You can apply the week-to-date range by clicking the **THIS WEEK** button. Week to date always starts on the most recent Monday. The button sets the start date to the most recent Monday and the end date to yesterday.

3.3.6.3 Last Week

You can apply the previous week's date range by clicking the **LAST WEEK** button. Last week always ends on the most recent Sunday. The button sets the start date to 7 days before the most recent Sunday and sets the end date to the most recent Sunday.

3.3.6.4 Month to Date

You can apply the month-to-date range by clicking the **THIS MONTH** button. Month to date always starts on the first date of the current month. The button sets the start date to the first date of the month and sets the end date to yesterday.

3.3.6.5 Last Month

You can apply the last month's date range by clicking the **LAST MONTH** button. The button sets the start date to the first date of the previous month and sets the end date to the last date of that month.

3.3.6.6 Year to Date

You can apply the year-to-date range by clicking the **THIS YEAR** button. It sets the start date to 1 January of the current year and sets the end date to yesterday.

3.4 Accessing the Dashboard Desktop

You can access the Syntelate XA Dashboard Desktop if you are a member of a reporting group that's assigned to a reporting workzone. (If you don't know which groups and workzones you are a member of, ask your manager.)

If you are a member of one reporting group only, then after you log in to Syntelate XA you will be automatically logged onto the Syntelate XA Dashboard Desktop associated with that reporting workzone.

If you are a member of multiple agent or reporting groups, after you log in to Syntelate XA, you are asked to pick a workzone to log onto. The workzone list will show you the workzones that you are a member of. The name of your reporting workzone is decided by your company, but it's likely to be Dashboard or similar. If you don't see the workzones list, or you think there is a workzone missing from the list, ask a manager for help.

Note: If you are not familiar with workzones, see the section 'Concepts' in the PDF Guide, *Syntelate XA - Agent* for a simple overview, and see the section 'Workzone Editor' in the PDF Guide, *Syntelate XA - Designer* for a technical overview.

3.5 What Next?

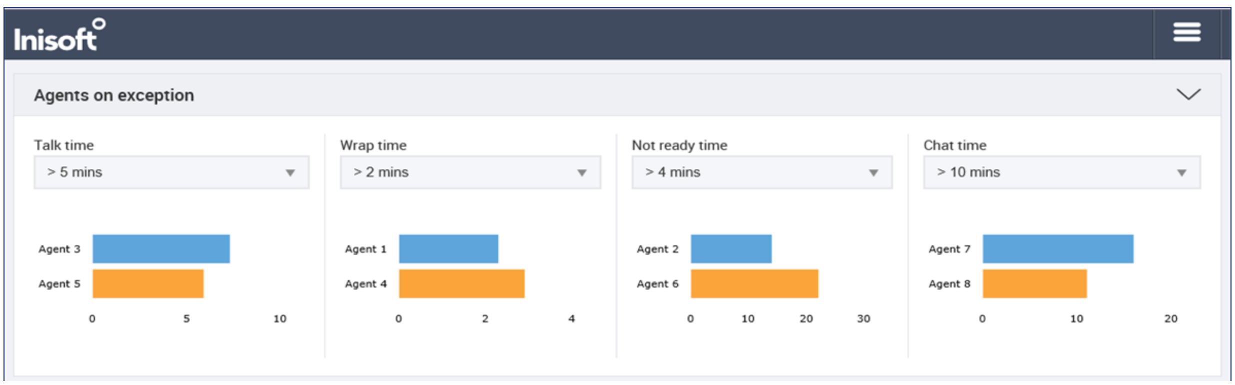
The rest of this document describes some typical dashboards and reports.

Tip: If you can't find information about a particular dashboard or report, contact Inisoft Support at support@inisoft.com or +44 (0)800 668 1290.

3.6 Agents on Exception

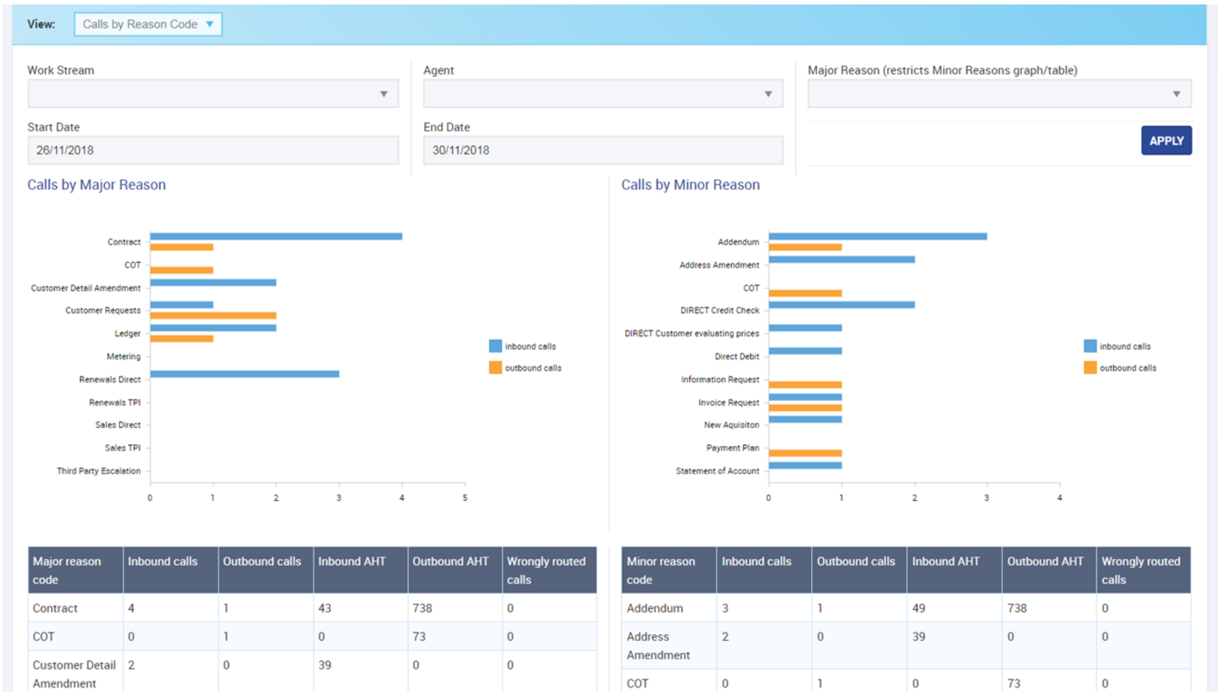
Use the **Agents on exception** report to see a snapshot view of any atypical agent activity happening right now. For example, an agent who is on a call that has lasted over twenty minutes and which is still in process.

The report is organized into categories of activity, such as **Talk time** and **Chat time**. Each of the categories is set with filters that let you sort the data according to upper or lower limits. The data can be presented in a graph, chart, or table.



3.7 Calls by Reason

Use the **Calls by reason** report to see the major and minor reasons for the inbound calls, outbound calls and web chats that are handled between two dates. The data is presented in both table and chart formats.



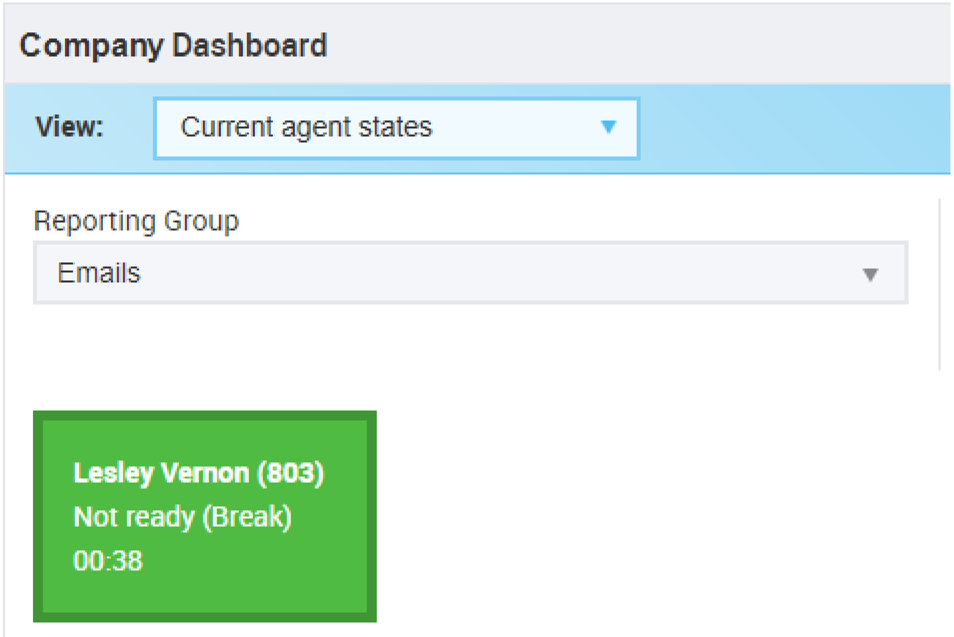
You can view data for a specific date range. To do this, set the **Start date** and **End date** fields as required and then click **APPLY**.

To restrict the data shown to a particular major reason or to interactions handled by a particular agent, edit the **Major reason** or **Agent** dropdowns and then click **APPLY**.

To export the data in either table to a Microsoft Excel workbook, click the **EXPORT** buttons.

3.8 Current Agent States

Use the **Current agent states** report to see a visual of your agent activity in real time.



Agent status details are shown in a color-coded tile for each agent. By default, a tile for every agent currently active is displayed.

If you have reporting groups set up, use the **Reporting group** filter to view current agent status by reporting group.

> **Tip:** You can manage the reporting groups using a **Configuration Desktop**. See the document 'Syntelate XA - Supervisor.pdf' for more information.

For each agent currently logged in to Syntelate XA you see:

- The agent's name
- The agent's phone extension

- The agent's current state
- The selected **Not ready reason** code (if the agent's state is **Not ready**)
- How long the agent has been in that state

Threshold times can be set for each **Not ready** reason. In addition, color settings for the tile can be set that change according to whether the agent is under or over the threshold.

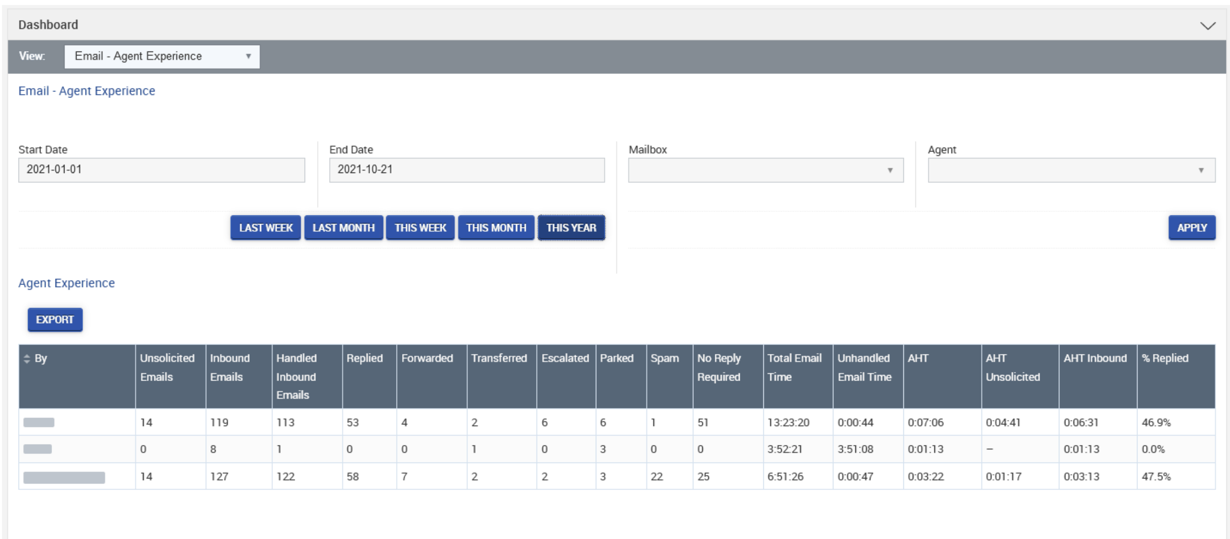
For example, if the threshold for **Break** is set to 900 seconds (15 minutes) and the agent remains in a **Break** state for less than the threshold, the tile is amber. But if the **Agent state** is in **Break** for over 900 seconds, their tile is red.

The color-coding system and threshold times are configurable.

> **Tip:** A task is run everyday in Syntelate XA to log out any agent whose **Agent state** has been **Idle** for more than 30 minutes.
>
> The time of day for that task is configurable in the **GENERAL** setting `ResetAgentsTime`. A blank value will stop the method from running. Otherwise, the setting should contain a time of day in 24-hour format HH:MM (i.e. 02:00 will cause the method to run at 2:00 AM).
>
> Any agents still logged in to Syntelate XA at the configured time who have been idle for more than 30 minutes will be logged out from both Syntelate XA and the telephony.
>
> This method is code to Syntelate XA so is available independent of any telephony setup.

3.9 Email - Agent Experience

The **Email - Agent Experience** report tells you what email processing activity each agent performed on a given date or date range.



By	Unsolicited Emails	Inbound Emails	Handled Inbound Emails	Replied	Forwarded	Transferred	Escalated	Parked	Spam	No Reply Required	Total Email Time	Unhandled Email Time	AHT	AHT Unsolicited	AHT Inbound	% Replied
	14	119	113	53	4	2	6	6	1	51	13:23:20	0:00:44	0:07:06	0:04:41	0:06:31	46.9%
	0	8	1	0	0	1	0	3	0	0	3:52:21	3:51:08	0:01:13	–	0:01:13	0.0%
	14	127	122	58	7	2	2	3	22	25	6:51:26	0:00:47	0:03:22	0:01:17	0:03:13	47.5%

You can use the date, agent and mailbox filters to drill down into the data and adjust the report.

If you don't pick a date, the report defaults to show the data from the previous seven days up to and including yesterday. For example, if today is the 8th of the current month, then the default date range will be the 1st to the 7th.

If you don't pick an agent or a mailbox, the report shows you data for all agents and all mailboxes.

EXAMPLE

For example, you pick the date 27 January 2021, and you pick one agent, 'Saha Afif' and one mailbox, 'sales@yourcompany.com'.

The report will tell you how many emails on 27 January 2021 Saha Afif replied to, forwarded, parked, etc. from the sales mailbox.

What the report doesn't show you is when those emails were first received by Syntelate XA. If you want to see that, use the Email - Customer Experience on page 71 report.

If you need to share the report with your team, use the **EXPORT** button to generate it as an Excel spreadsheet. Note that the grid columns in the displayed report are not sortable, but you can sort them in the exported report. The maximum number of records you can export is 1000.

Below is a description of the information available in this report.

3.9.1 Quantity of Emails In and Out

Type of email	Definition for this report
Unsolicited emails	The number of unsolicited emails an agent has sent on the date specified in the report filters. Excludes unsolicited emails that have been created or opened but then parked or closed with no changes made.
Inbound	The number of inbound emails that popped to an agent and were

Type of email	Definition for this report
emails	dispositioned by that agent on the date specified in the report filters. Remember that inbound emails aren't always from a customer; they can include the following types of internal email: » Emails received by Agent B that were dispositioned by Agent A as Close No Change (at which point they rejoin the queue and are popped to an agent at a later time or date); emails dispositioned by Close No Change are counted as inbound for both Agent A and Agent B. » Emails parked by Agent A that will pop at a later time or date to Agent A or another agent; parked emails are counted as inbound for both Agent A and Agent B. » Emails transferred by Agent A to Agent B; transferred emails will be counted as inbound for both Agent A and Agent B.
Handled inbound emails	The number of emails that popped to an agent and were dispositioned by the agent on the date specified in the report filters using a button that flags the record with the completion code of EmailHandledAgent.

3.9.2 Quantity of Emails Handled by Outcome

Type of outcome	Definition for this report
Replied	For the date you specified, the number of emails sent by customers that an agent has replied to.

Type of outcome	Definition for this report
	Note that if Agent A begins a reply but decides to transfer or escalate it to Agent B, when Agent B eventually completes the reply, Syntelate XA records the reply as having been completed by Agent A.
Forwarded	For the date you specified, the number of emails that an agent has forwarded.
Transferred	For the date you specified, the number of emails that an agent has transferred.
Escalated	For the date you specified, the number of emails that an agent has escalated.
Parked	For the date you specified, the number of emails that an agent has parked. Note that when a parked email is subsequently completed, it will be reported as **Parked** for the date on which it was parked, and as **Handled inbound emails** for the date on which it was completed. Note that the AHT calculation accounts for parked emails by taking their start time to be when they were *last* popped to an agent.
Spam	For the date you specified, the number of emails that an agent has dispositioned as Spam Email.
No Reply Required	For the date you specified, the number of emails that an agent has dispositioned as No Reply Required.

3.9.3 Performance Measures

Email performance measure	Definition for this report
Total Email Time	For the date you specified, the total time that the agent has spent working on any type of email except unsolicited. The calculation counts how long the agent has been in the Email call state (in CALLSTATUSLOGGING).
Unhandled Email Time	Counts both the number of emails that agents dispositioned on the date specified using the **CLOSE NO CHANGE** button and the number of unsolicited emails that were parked on the date specified.
AHT overall	For the date you specified, the average handle time spent on **Handled inbound** and **Unsolicited emails**.
AHT for unsolicited emails	For the date you specified, the average handle time spent on **Unsolicited emails**.
AHT for inbound emails	For the date you specified, the average handle time spent on **Handled inbound emails**.
Total % of emails that were replied to	For the date you specified, tells you the percentage of **Handled inbound emails**.

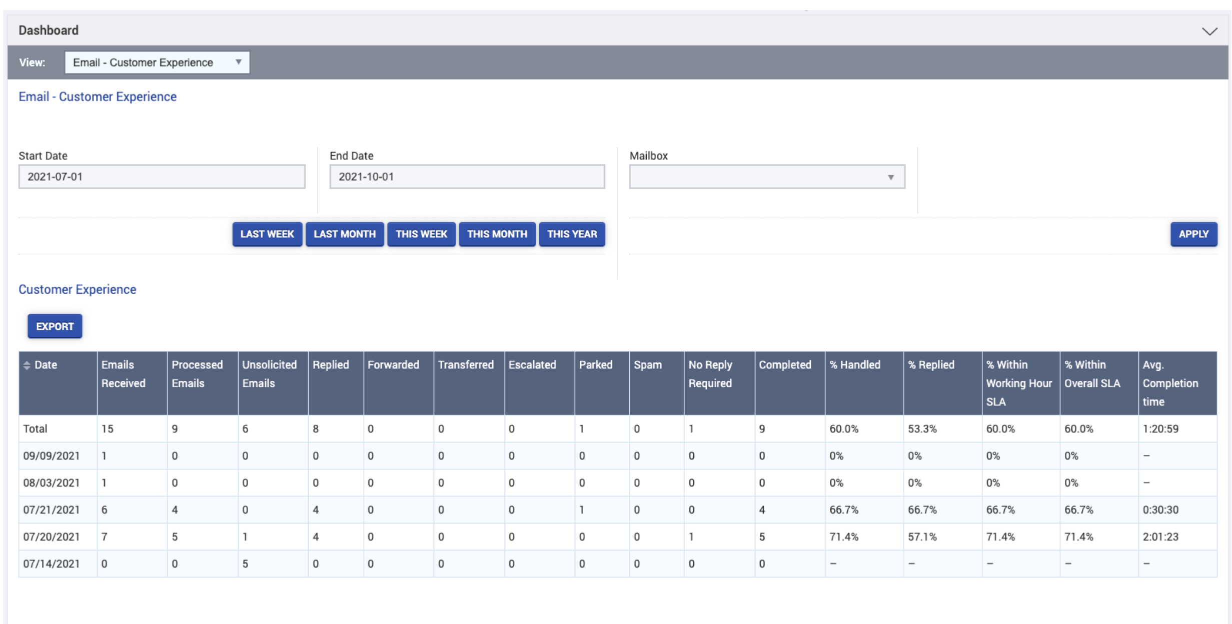
3.9.4 Also See

If you're looking at the agent's experience of email handling, you'll probably also want to look at the customer's experience too, which is reported on by Email - Customer Experience below.

Reporting Tables is where you can find a description of the database tables that are used to create email reporting.

3.10 Email - Customer Experience

The **Email by Customer Experience** report tells you the number of customer emails that were received on a given date and how they were processed.



Date	Emails Received	Processed Emails	Unsolicited Emails	Replied	Forwarded	Transferred	Escalated	Parked	Spam	No Reply Required	Completed	% Handled	% Replied	% Within Working Hour SLA	% Within Overall SLA	Avg. Completion time
Total	15	9	6	8	0	0	0	1	0	1	9	60.0%	53.3%	60.0%	60.0%	1:20:59
09/09/2021	1	0	0	0	0	0	0	0	0	0	0	0%	0%	0%	0%	–
08/03/2021	1	0	0	0	0	0	0	0	0	0	0	0%	0%	0%	0%	–
07/21/2021	6	4	0	4	0	0	0	1	0	0	4	66.7%	66.7%	66.7%	66.7%	0:30:30
07/20/2021	7	5	1	4	0	0	0	0	0	1	5	71.4%	57.1%	71.4%	71.4%	2:01:23
07/14/2021	0	0	5	0	0	0	0	0	0	0	0	–	–	–	–	–

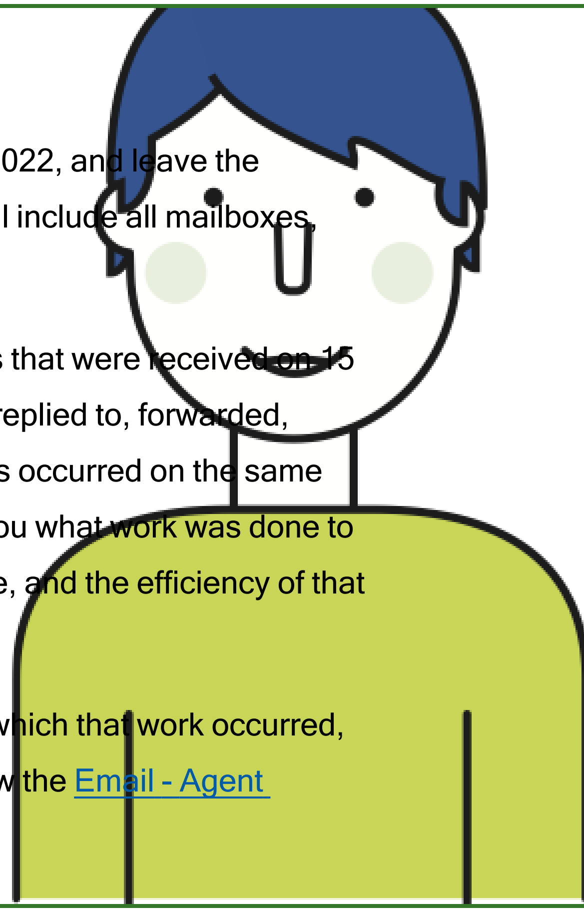
You can use the date and mailbox filters to drill down into the data and customize the report. If you don't pick a date, the report defaults to show the data from the previous seven days up to and including yesterday. For example, if today is the 8th of the current month, then the default date range will be the 1st to the 7th.

EXAMPLE

For example, you pick the date 15 August 2022, and leave the mailbox filter at default so that the report will include all mailboxes, and then you click **APPLY**.

The report will tell you the number of emails that were received on 15 August 2022, and how many of them were replied to, forwarded, parked, etc. no matter whether those events occurred on the same date or a later date. So, this report shows you what work was done to customer emails received on a specific date, and the efficiency of that work.

If you want to see a report on the dates on which that work occurred, and which agents carried out that work, view the Email - Agent Experience on page 66 report.



If you need to share the report with your team, use the **EXPORT** button to generate it as an Excel spreadsheet. Note that the grid columns in the displayed report are not sortable, but you can sort them in the exported report. The maximum number of records you can export is 1000.

Below is a description of the information available in this report.

3.10.1 Quantity of Emails In and Out

Type of email	Definition for this report
Emails received	For the date you specified, the number of customer emails that Syntelate XA has received.
Processed emails	For the date you specified, the number of customer emails that were received and were completed on/during that period or on a later date. Includes emails that were parked, transferred, or escalated and which were then subsequently completed.
Unsolicited emails	For the date you specified, the number of unsolicited emails that a customer has been sent by agents on the specified date or date range.

3.10.2 Quantity of Emails Received by Outcome

Type of outcome	Definition for this report
Replied	The number of customer emails received on the specified date that an agent has replied to.
Forwarded	The number of customer emails received on the specified date that an agent has forwarded.
Transferred	The number of customer emails received on the specified date that an agent has transferred. If a transferred email is subsequently completed, Syntelate XAremoves the transfer flag from the email interaction record and the email is reported under the heading of **Processed emails**.

Type of outcome	Definition for this report
Escalated	The number of customer emails received on the specified date that an agent has escalated. If an escalated email is subsequently completed, Syntelate XA removes the escalated flag from the email interaction record and the email is reported under the heading of **Processed emails**.
Parked	The number of customer emails received on the specified date that an agent has parked.
Spam	The number of customer emails received on the specified date that an agent has dispositioned as Spam Email.
No Reply Required	The number of customer emails received on the specified date that an agent has dispositioned as No Reply Required.
Completed	The number of customer emails received on the specified date that have been dispositioned with a disposition code that marks the record as having been completed.

3.10.3 Performance Measures

Email performance measure	Definition for this report
% Handled	The percentage of customer emails received on the specified date that have been handled.
% Replied	The percentage of emails received on the specified date that have been

Email performance measure	Definition for this report
	replied to.
% Within working hours SLA	The percentage of emails received on the specified date that have been handled within the service level agreement (SLA) for working hours.
% Within overall SLA	The percentage of emails received on the specified date that have been handled within the service level agreement (SLA) for all hours.
Avg. completion time	The average completion time of each email interaction record for emails that were received on the date specified. The calculation counts the time spent within working hours only, and counts from the time the email was received up to it being completed. The calculation does not include any hours outside of working hours. This measure only counts completed inbound emails; it excludes completed unsolicited emails.

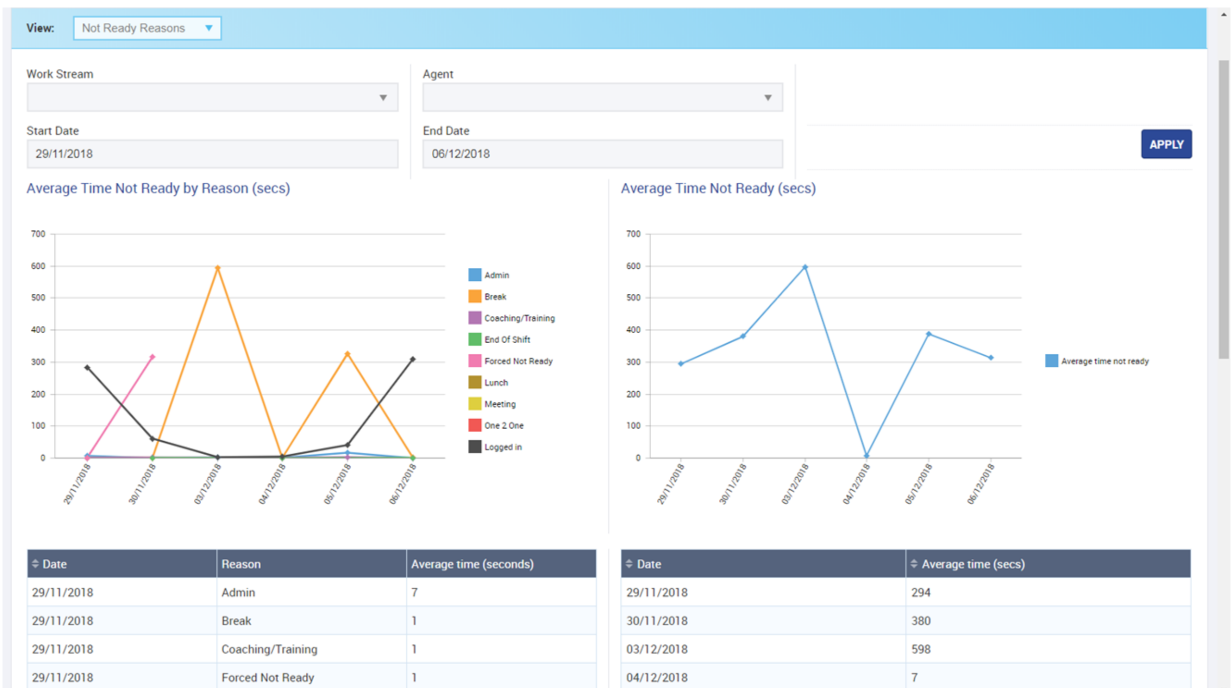
3.10.4 Also See

Since you're looking at the customer's experience of emailing your contact center, you'll also want to look at the agent's experience of receiving those emails, which is reported on by Email - Agent Experience on page 66.

Reporting Tables is where you can find a description of the database tables that are used to create email reporting.

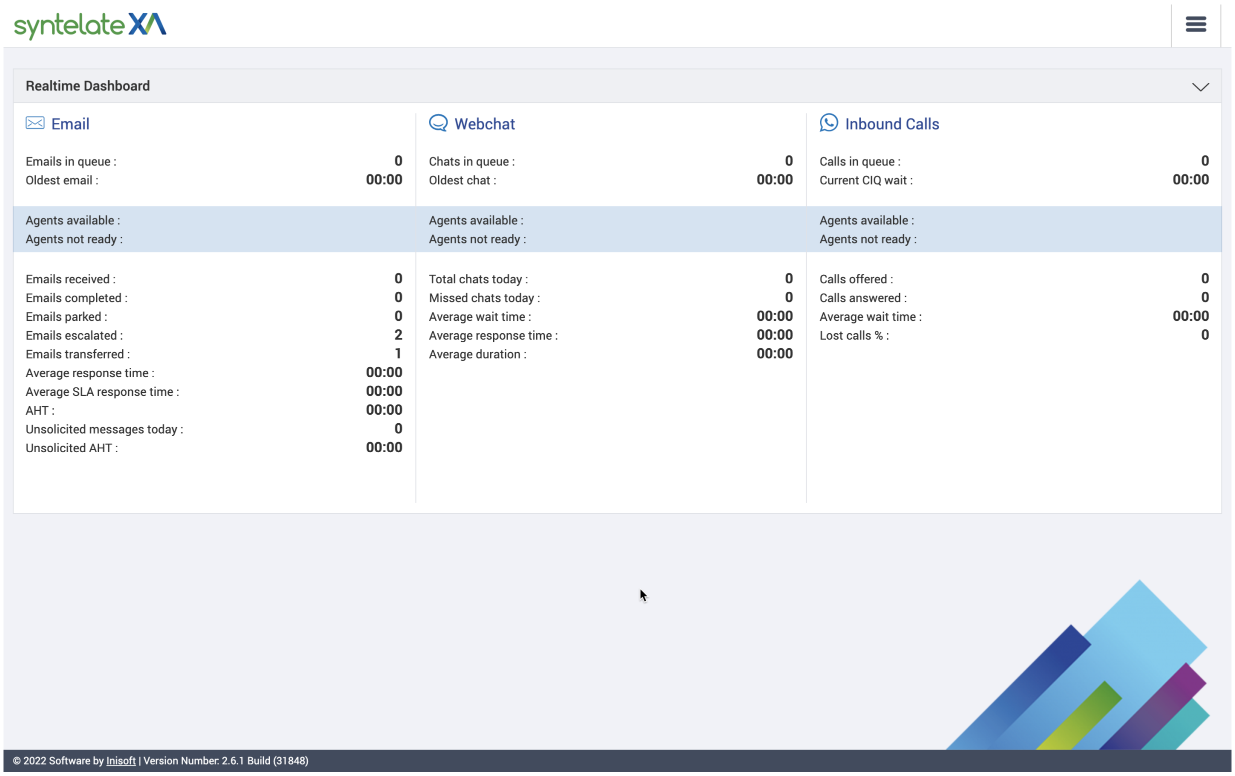
3.11 Not Ready Reasons

Use the **Not ready reasons** report to see the average time spent by agents in a not ready state, segmented by the not ready reason that the agent picked. You can filter the report by date, agent, and work stream.



3.12 Real-time Activity

The **Real-time Activity Dashboard** shows you the live activity happening across all channels in the contact center.



- Interaction queues
- The oldest interaction in a queue
- Agents logged in, available, and not ready
- Emails received, completed, parked, escalated, transferred
- Chats offered to agents, answered, abandoned
- Calls offered to agents, answered, abandoned
- Average wait times
- Average agent response times
- Average handling times

The above is an example of what information can be included on a Real-time Activity dashboard. When you work with us, we tailor the dashboard to suit your business requirements.

3.13 Reasons by Channel

The **Reasons by Channel** report shows the major and minor reasons that agents assigned to interactions, and for each channel. The report is provided in table and chart formats.

Dashboard

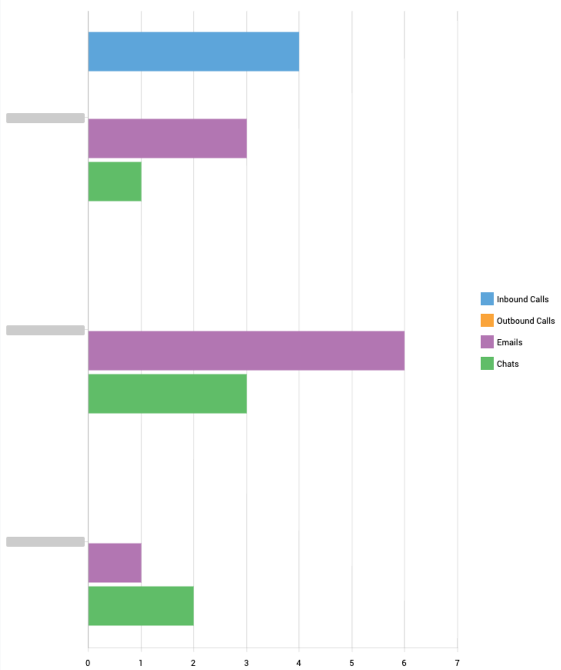
View: Channel - Major / Sub Reasons

Start Date	End Date	Source	Channel
2021-06-01	2022-02-02	Client	

Agent	Major Reason	Minor Reason	Sub Reason

APPLY

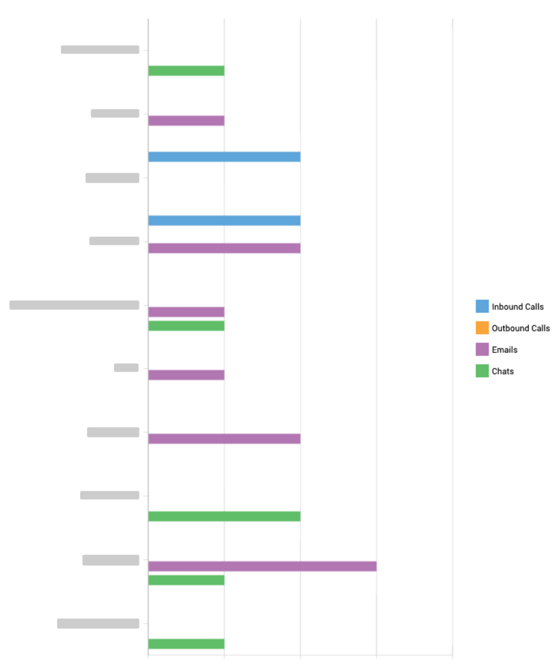
Major Reason



EXPORT

Reason	Inbound Calls	Outbound Calls	Emails	Chats
Total	4	0	10	6
	4	0	3	1
	0	0	6	3
	0	0	1	2

Minor Reason



EXPORT

Reason	Inbound Calls	Outbound Calls	Emails	Chats
	4	0	10	6
	0	0	0	1
	0	0	1	0
	2	0	0	0
	2	0	2	0
	0	0	1	1
	0	0	1	0
	0	0	2	0
	0	0	0	2
	0	0	3	1
	0	0	0	1

Sub Reason

EXPORT

Reason	Inbound Calls	Outbound Calls	Emails	Chats
	4	0	10	6

You can view data for a specific date range. To do this, set the **Start date** and **End date** fields as required and click **APPLY**.

To restrict the data shown to a particular major reason or to interactions handled by a particular agent, change the **Major reason** or **Agent** selections and click **APPLY**.

To export the tabulated reports, click the **EXPORT** button.

3.14 Sentiment Analysis

3.14.1 Overview

The report on sentiment analysis tells you the average sentiment rating of customer interactions for each channel, by date and by agent.

3.14.2 Search Filters

You can filter the report by agent and date.

- **From date**: Select a date to search from.
- **To date**: Select a date to search up to.
- **Agent**: Select an agent to see the average customer sentiment rating for their interactions.

If you don't pick a date, the report defaults to show the data from the previous seven days up to and including yesterday. For example, if today is the 8th of the current month, then the default date range will be the 1st to the 7th.

If you don't pick an agent, the report shows data for all agents.

3.14.3 The Report

The report is displayed in table format and shows the following information:

- **Channel**: Shows results by channel. If you search by a specific agent, then only the channels that the agent works on will be displayed in the report. If you don't search by a specific agent, then all channels will be shown.
- **Average rating**: Shows the average rating for customer sentiment for the channel listed, and for the given date or date range. A rating between -0.25 and 0.25 is classified as neutral. Anything above is positive, anything below is negative.
- **Sentiment indicator**: An emoji that will be a happy, neutral or angry face to indicate the average sentiment rating of positive, neutral or negative.

For email and Facebook Messenger, a conversation between a customer and an agent can involve multiple interactions back and forth over several days. In those cases, the sentiment rating of the last customer interaction in the chain is used to calculate the average rating, and the rating is stored against the date of the customer's first message.

If an email is classified as spam in the email queue before it reaches an agent, then it won't be analyzed.

3.14.4 Features

EXPORT: Lets you export the table to Microsoft Excel workbook format.

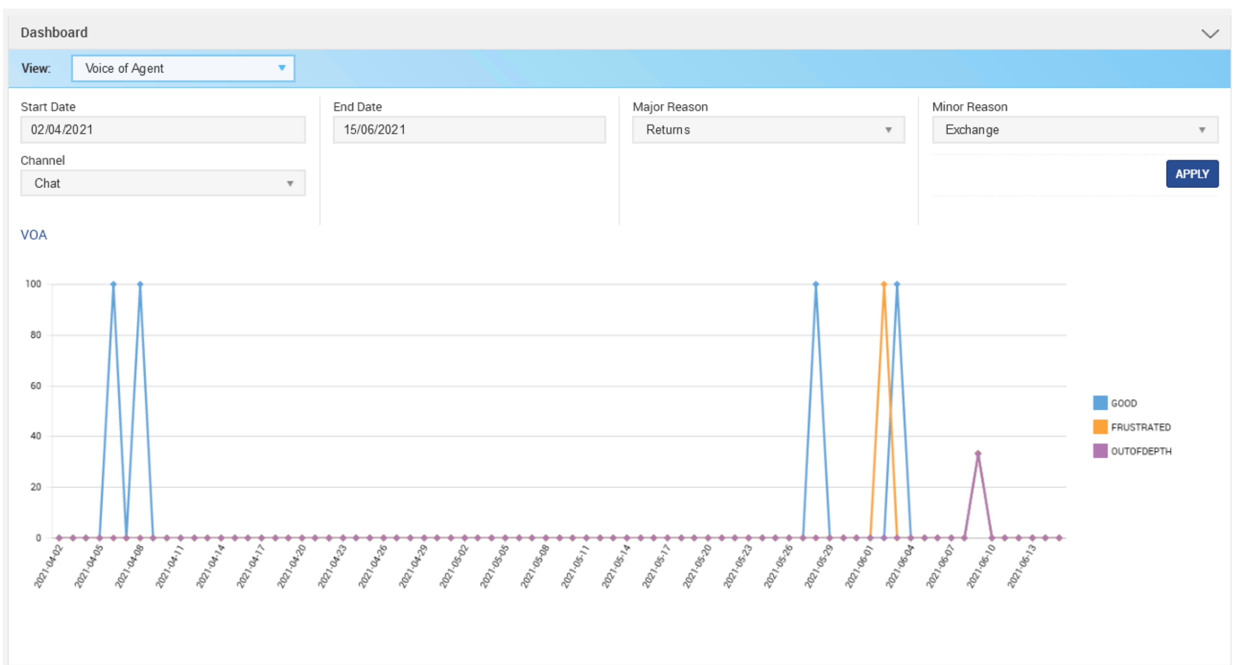
GENERATE SUMMARY:Lets you generate an executive summary. See Report Summarizer on page 58 for details.

3.15 Voice of the Agent

The **Voice of the Agent** report provides business insight into the value of the existing processes used by agents to serve customers. The data is aggregated by Syntelate XA to help managers gain visibility of complex or exceptionally difficult customer interactions.

For example, if a pattern of **Voice of the Agent** responses emerges that correlates with a pattern of **Major Reasons** and **Minor Reasons**, management will work with the business and with agents to identify business and coaching improvements.

Here's an example of a **Voice of the Agent** report.



This example displays the **Voice of the Agent** report as a line graph.

You can see in the screenshot that the report has been filtered using the following search filters:

- Start Date
- End Date
- Major Reason
- Minor Reason
- Channel

The graph plots the percentage (%) of chat interactions completed by date, and the line representing each interaction is color coded to indicate the **Voice of the Agent** response for that interaction.

The agents can choose one of three possible responses:

- Felt good
- Felt frustrated
- Felt out of their depth

The lines in the graph are interactive. You can click on them to reveal greater detail. Similarly, the legend is interactive. Click on an item in the legend to show/hide only that line.

> **Note:** Syntelate XA's **Voice of the Agent** add-on is customizable. If you would like to discuss how it could add value to your business, contact our sales team for a no-obligation discussion: sales@inisoft.com.