# QUICK AUDITS CONTACT CENTER - USER GUIDE

This guide will walk you through the basics of configuring an account and using Quick Audits in your Contact Center

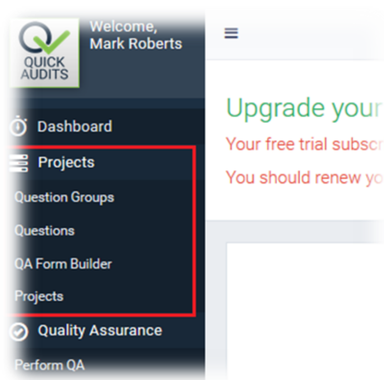
The main two objectives of the tool are to simplify the way quality control evaluations are executed as well as to create awareness among employees about quality deviations and what needs improving.

We kept the configuration somewhat flexible in order to make the tool more powerful and versatile, which makes the configuration process a bit less friendly at first.  Not to worry! ……  This guide contains all you need to know and we are always glad to help you.  Feel free to email us at any time at support@quickaudits.io if you need assistance.

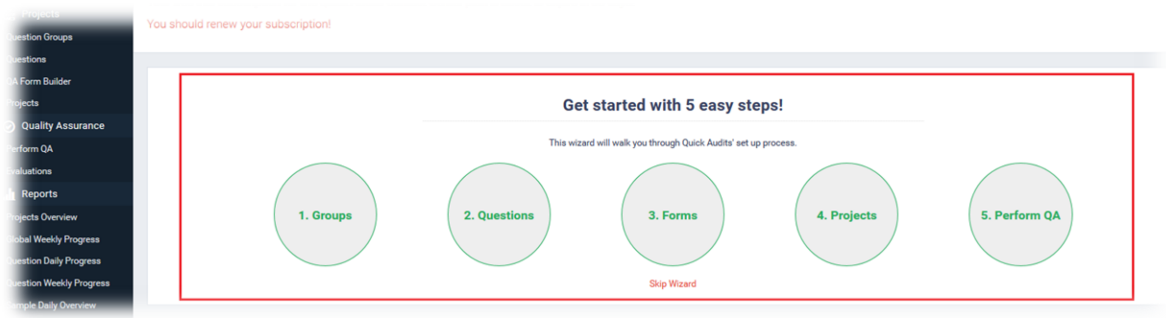
In order to use our tool you will need to create an account, which will create the first user and this user will be a Manager *(Administrator)*.

On your first log in you will also need to create the following *(it is best to create in this order)*:

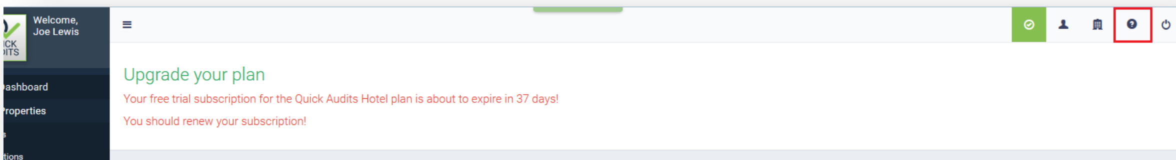
1. Question groups
2. Questions
3. Forms
4. Projects




**The tool includes a help wizard that can help you with this process.**



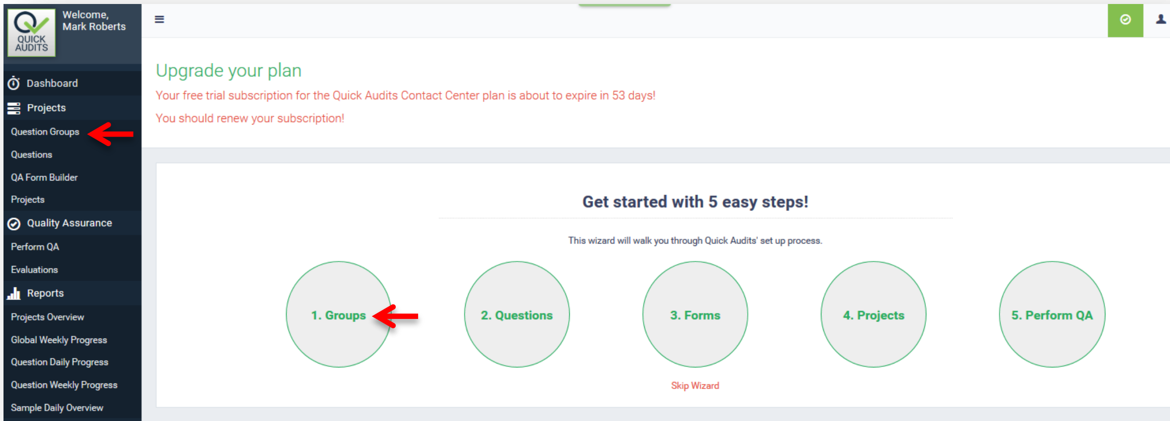

You can close the help wizard by clicking "Skip Wizard" and can re-open it by clicking the question mark on the top menu.



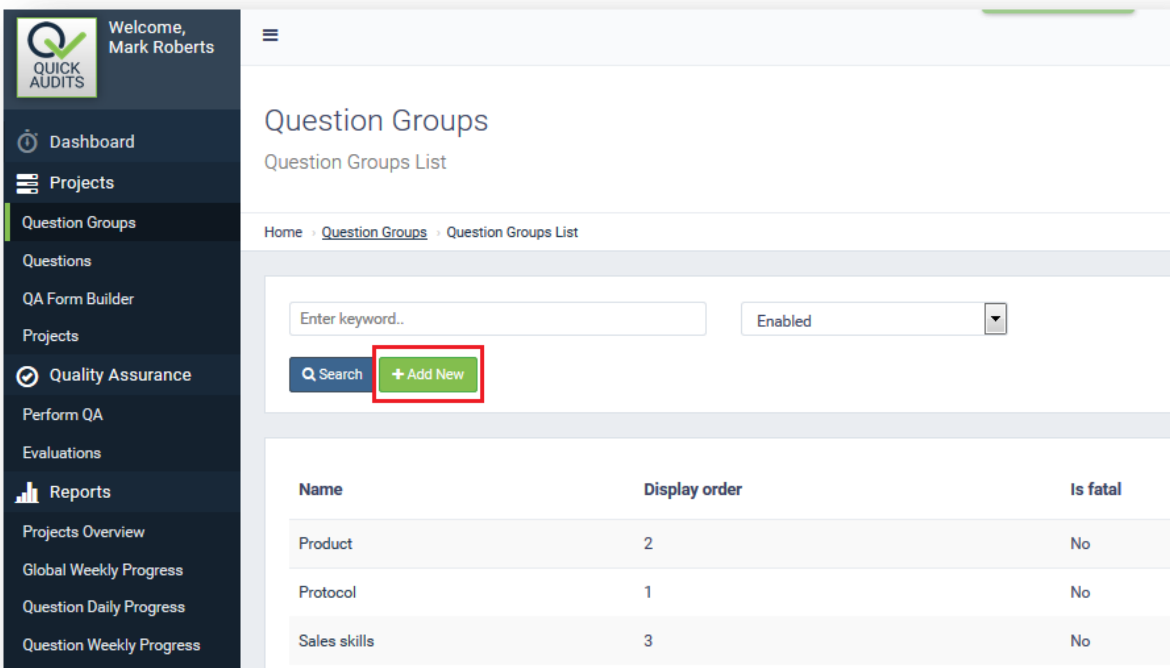

Quick Audits Contact Center allows you to manage multiple projects, have different groups within each project, evaluate these through different channels and use different evaluation forms if you wish to do so.

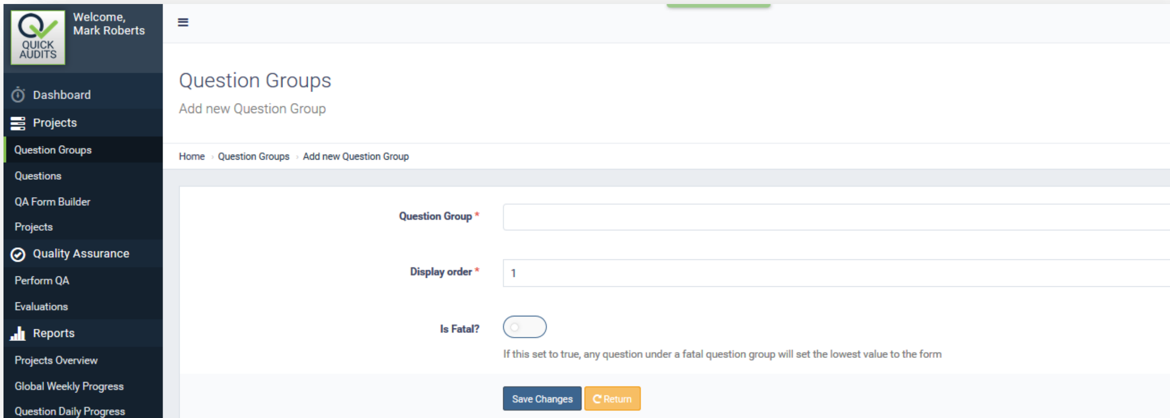
Each **project** needs at least one **channel** of evaluation *(Phone, Email, Chat or Mobile Device)* each channel needs an evaluation **form**, each evaluation form is composed of different **groups** and each group contains **questions**.

**1 Question groups:** You should create one group per sector you wish to evaluate *(e.g. call opening, call closing, manners, etc.)*. You can do so by clicking on "Question Groups" on the menu on the left or "Groups" in the wizard.



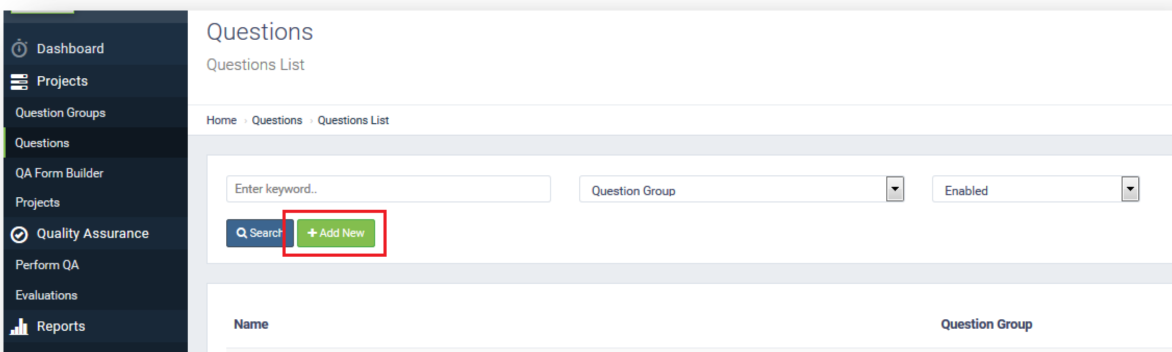

Here you will be able to modify existing group templates or create a new group by clicking the "Add new" button. During the creation process you will need to indicate the order in which the groups will be displayed in the evaluation form and whether or not each group or group is **"Fatal".** If you make a group fatal, any question with a positive answer will set the entire evaluation form to **Zero**. *This is used to put emphasis on groups that are absolutely critical (e.g. cursing during the call).*





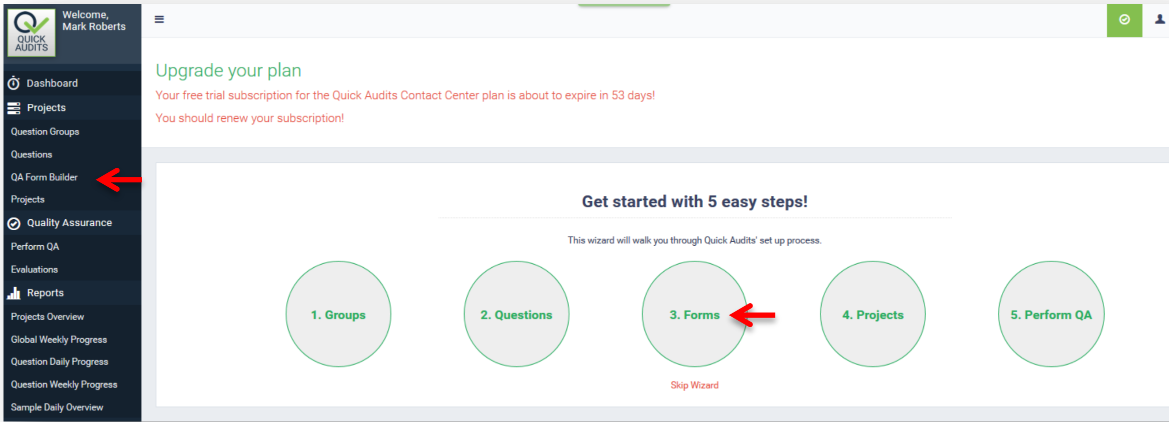

You can create questions for this group right away, but we recommend that you create all of your groups first. Repeat the process *(by clicking on "Groups" on the menu on the left → clicking the "Add new" button)* until all of your groups are created.

**2 Questions:** Once you created your groups you can go ahead and create your questions. Again, you can modify existing question templates or create new questions by clicking the "Add new" button. Note that you will need to indicate the group or group each question belongs to *(this is why it is best to create all groups first).*

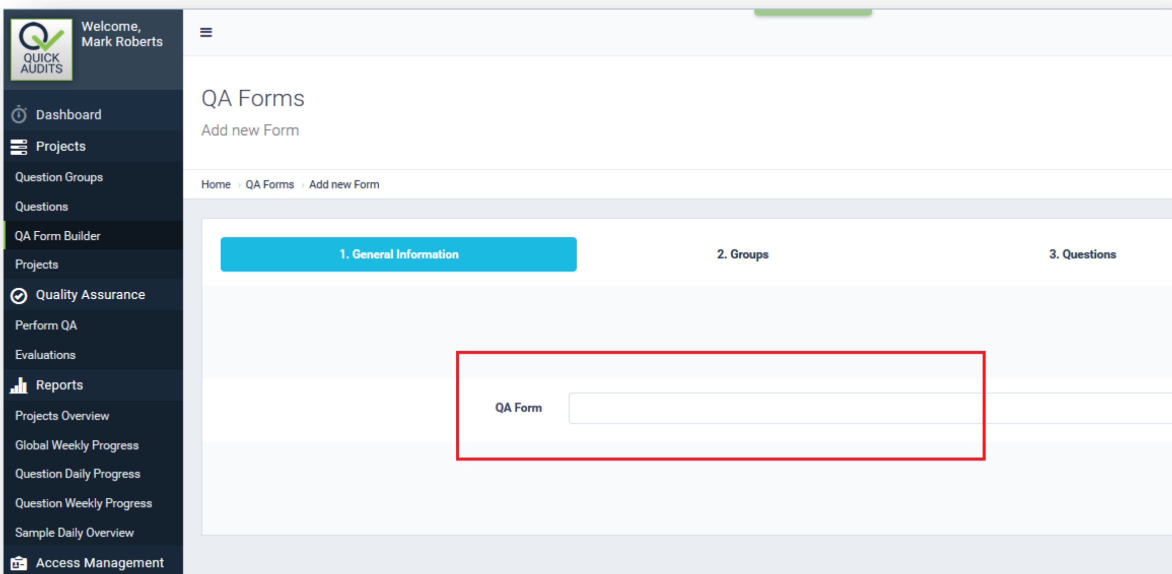



Repeat the process *(by clicking on "Questions" on the menu on the left → clicking the "Add new" button)* until all of your questions are created.

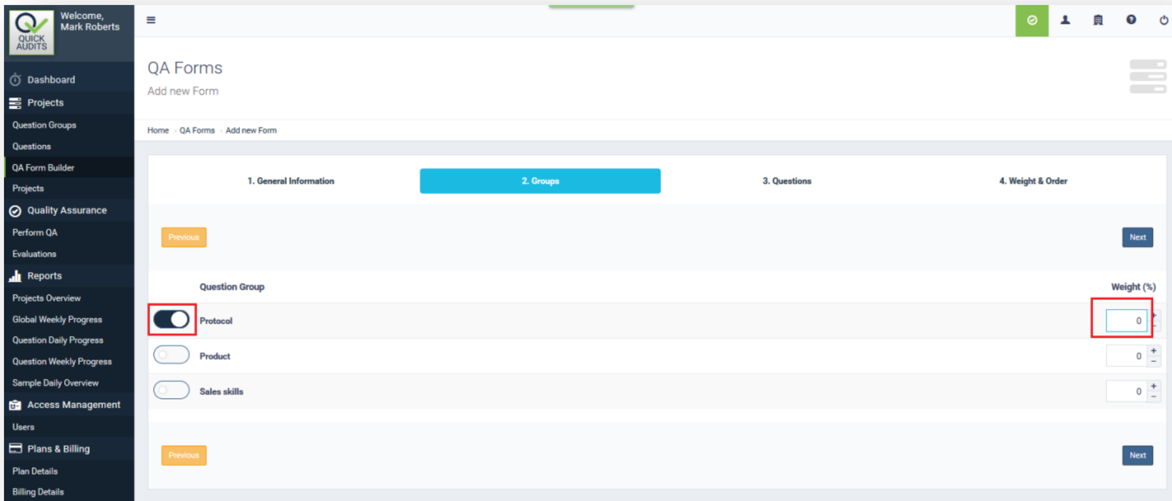
**3 Forms:** So you know what groups of your Contact Center or services you want to evaluate and you have the exact questions. It is now time to decide the arrangement and importance of your questions as well as the type of answer you are looking for. You will do this by clicking on the 3rd circle of the wizard (Forms) or choosing "QA form builder" from the menu on the left and following the 4 steps in the builder.



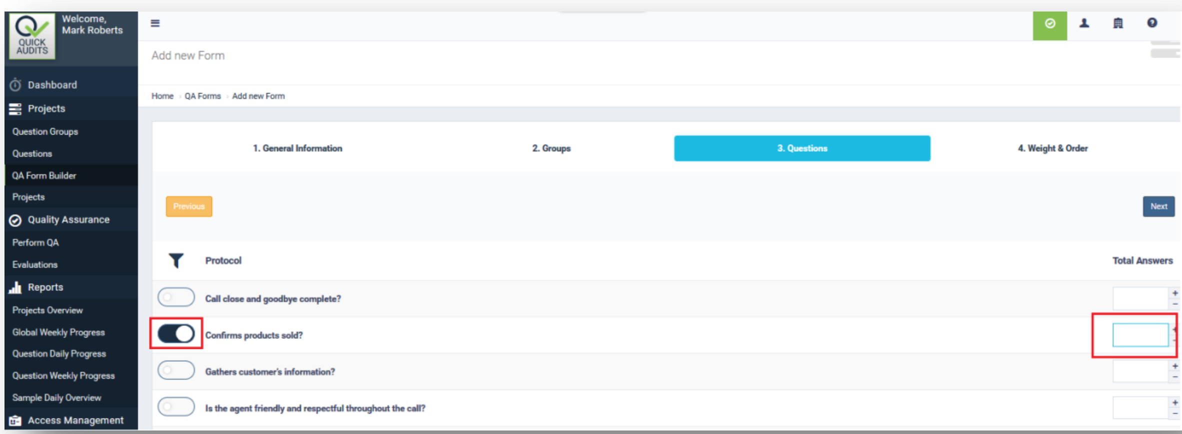

**Step Ⅰ:** Give your form a name and click next *(you can build several forms using the same groups and questions or you can use different groups and questions for other forms).* You will identify each configuration by the name you give each form.



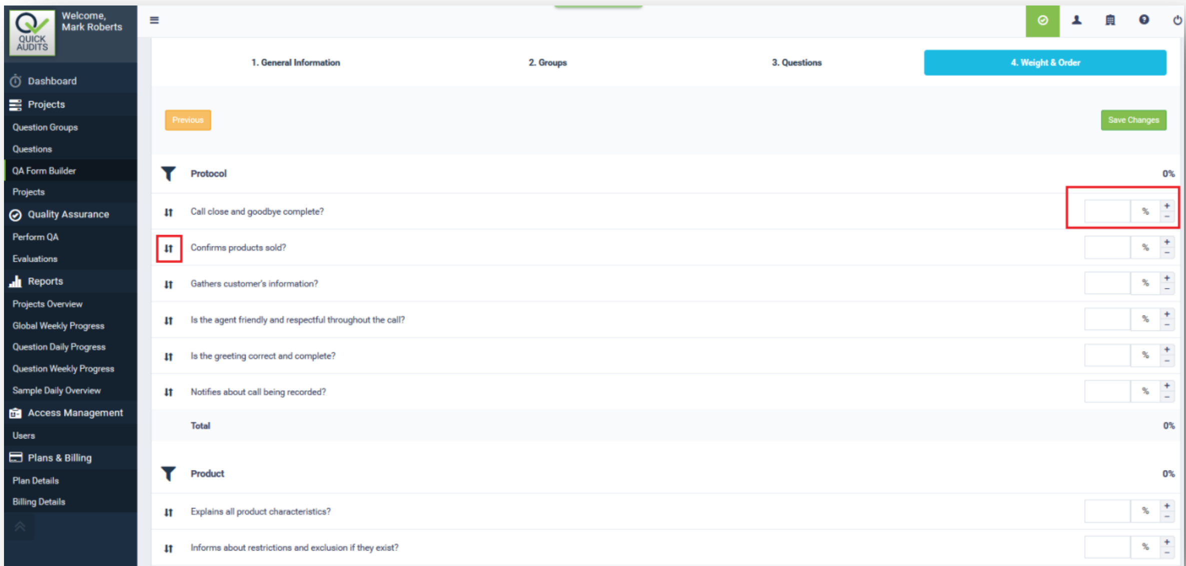

**Step Ⅱ:** Decide which of the groups you created will be in this form by clicking on the button to the left of each of them, assign each group a weight or importance on the boxes to the right ***(Note that the weights must add 100%)*** and click next.




**Step Ⅲ:** Decide which of the questions you created will be in this form by clicking on the button to the left of each of them, indicate how many answers to each question on the boxes to the right ***(a value of "2" will offer the guest a "yes" or "no" answer, any higher value will offer a scale to answer your question)*** and click next.




**Step Ⅳ:** The last step on the form builder will allow you to re arrange the order of your questions *(they are displayed in alphabetical order by default)* within the question group or group *(remember that you set the display order of the groups when you created them).* To do this, click on the question and drag it to de desired order. You also have to give each question a specific weight according to its importance **(Note that questions of each question group must add 100%).**



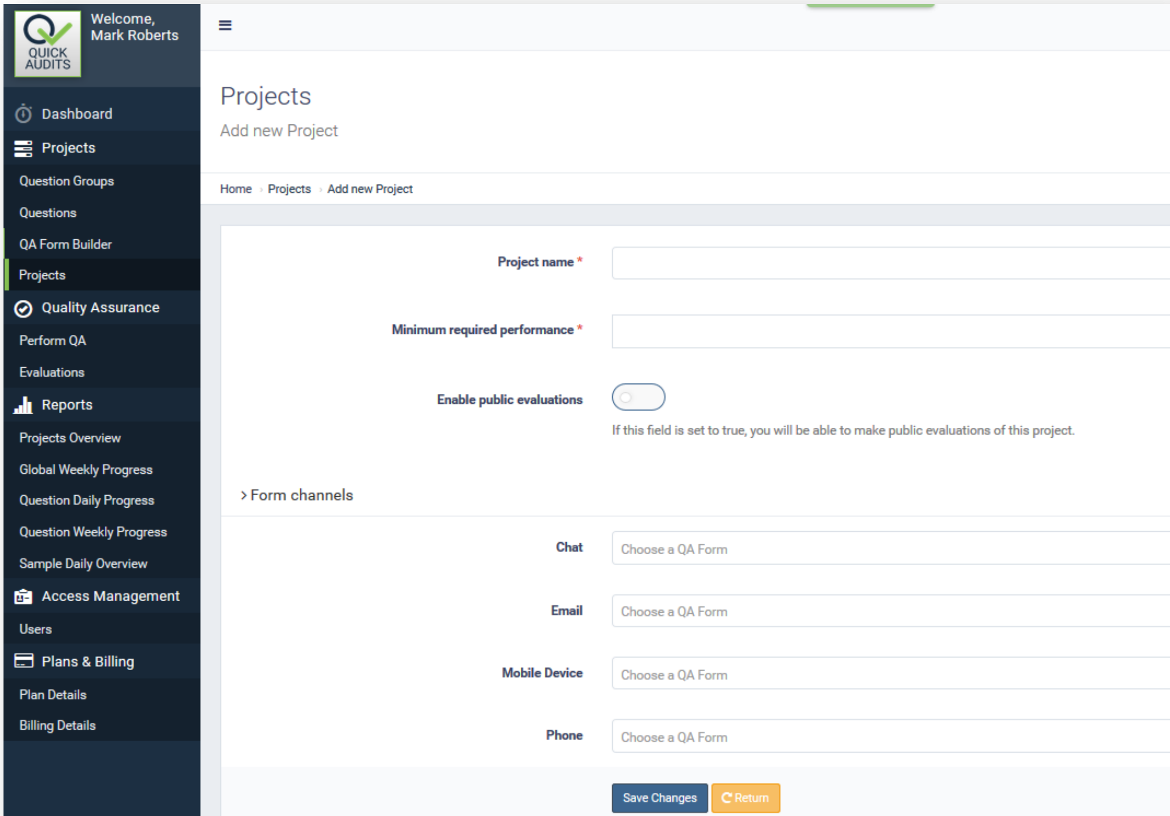

<u>Click "Save changes" when you are done, to save this survey.</u>

You now have a survey form ready to use, which will be listed under "Forms" in the QA form builder section.

**4 Projects:** This is the last step of your account configuration. We trust that by now, you know that you can access projects from the menu on the left or the wizard.

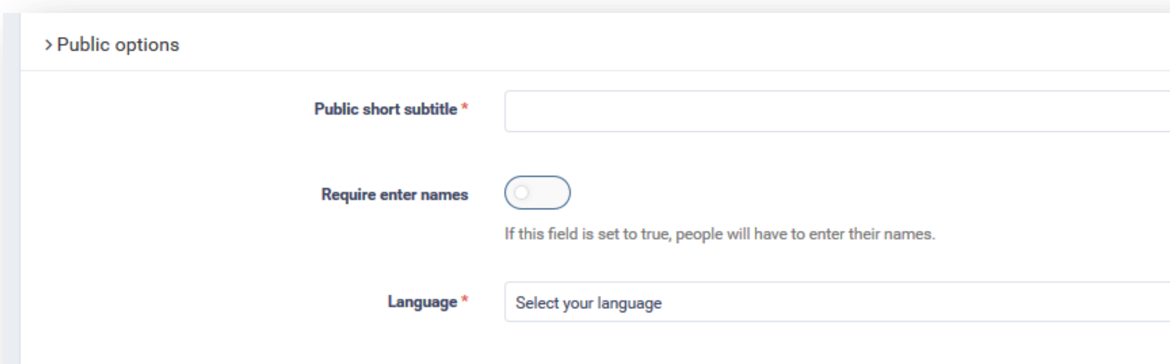
You should create one project for each campaign of your Contact Center. As you did before, you create projects by clicking on the green "Add new" button. When creating projects you will need to do the following:

- Give your project a name
- Indicate the performance level you want to set as a target (number value 1 to 100)
  - This is the score resulting from your evaluations
- Indicate whether or not you will allow public evaluations
  - Enabling this will let you generate a URL and a QR code so it can be access by the general public *(e.g. to be sent via email in CSAT campaigns)*
- Choose a survey form *(the ones created in step 3)* for each channel of evaluation you wish to use *(you may want to ask different questions depending on the channel of communication [e.g. check grammar in email and chat campaigns]).*

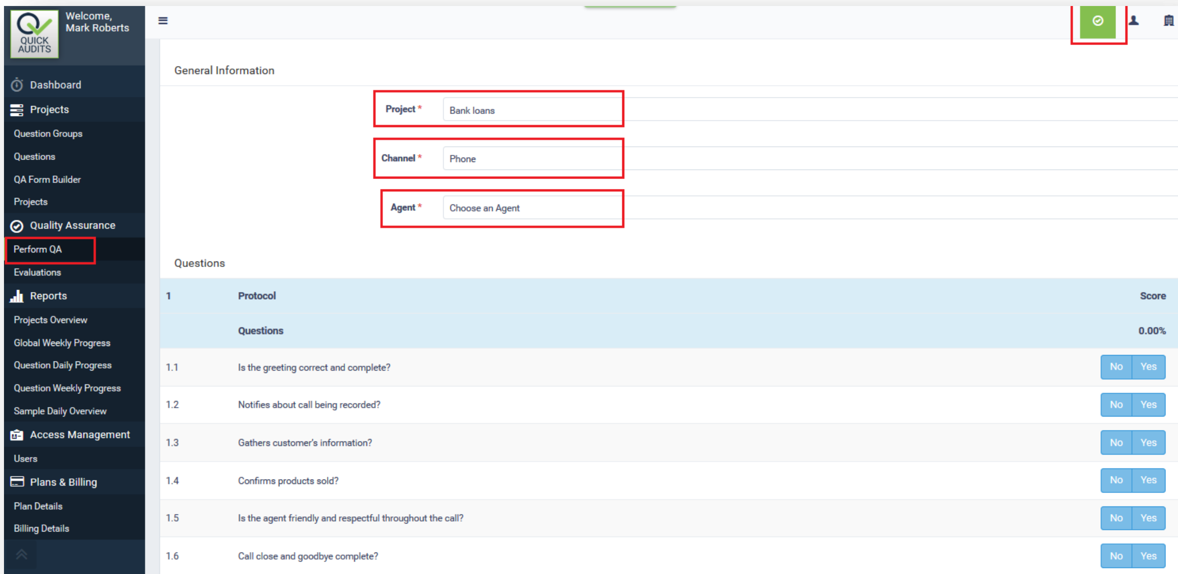



If you choose to enable public evaluations you will have to configure the “public options” by:

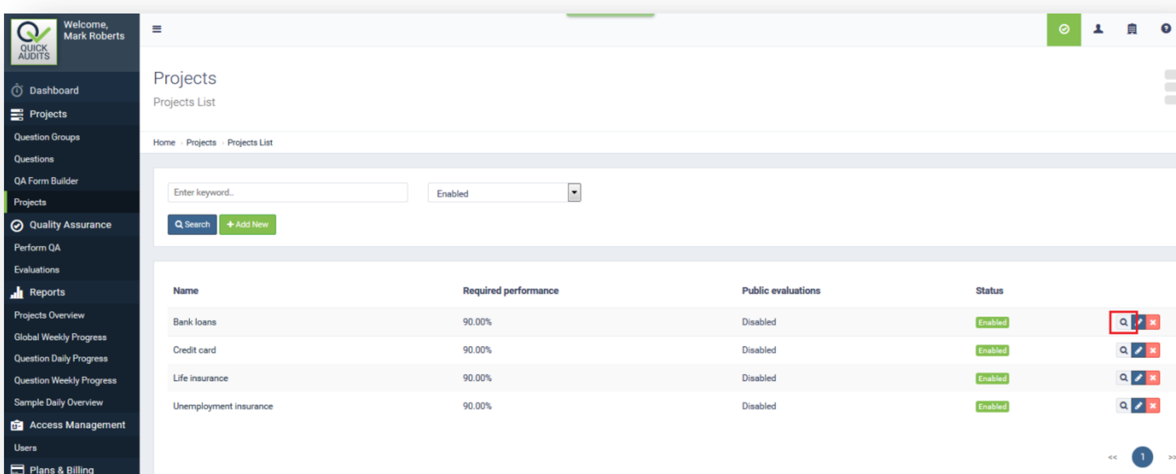
- Entering a short subtitle to be displayed in the public evaluation (e.g. *“We value your opinion. Please fill out this brief survey and feel free to elaborate in the free text field”*)
- Indicating whether or not it is mandatory for customers to enter their names
- Selecting a language for the public evaluation



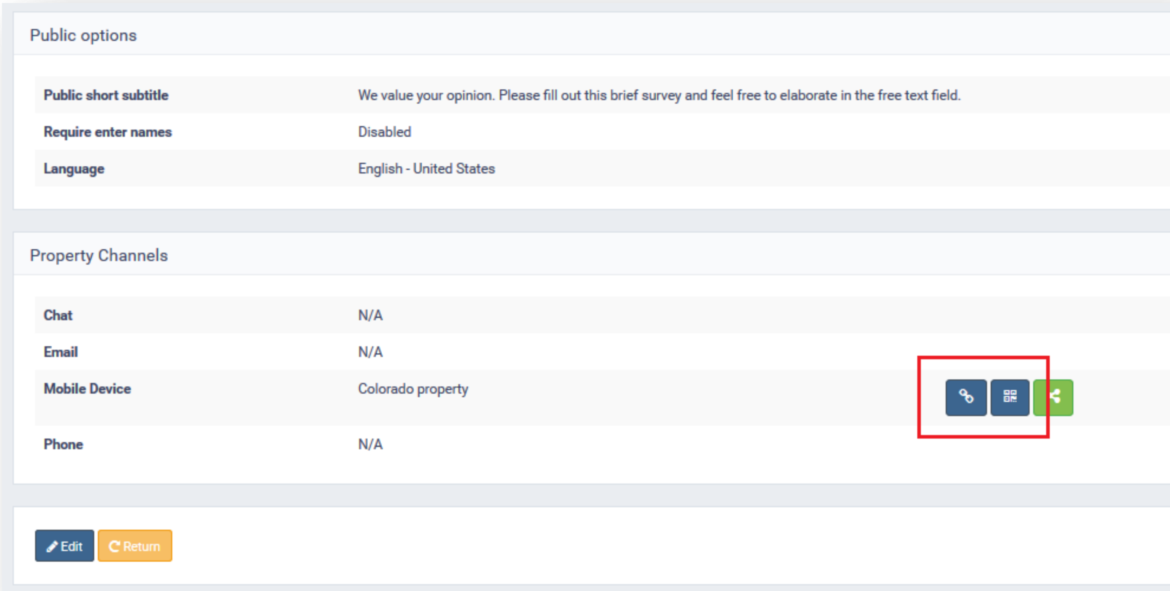
You are now ready to start evaluating your different campaigns.  If you wish to do an internal evaluation you can do so from a tablet, a mobile phone or a PC by clicking on the green checkmark on the top bar or "Perform QA" on the left menu.  <u>Make sure to the right project channel and agent are selected.</u>



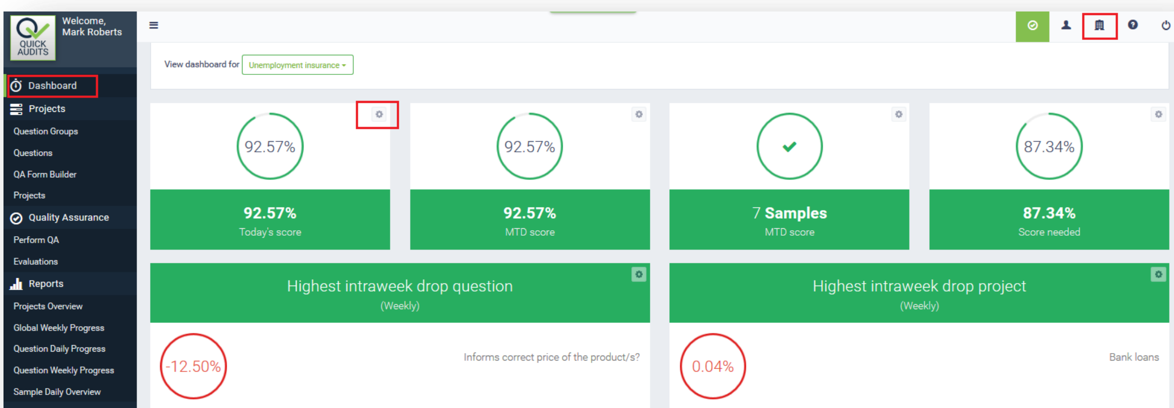

If you wish to generate a link to be sent via email or a QR code for your customers to scan, you will have to go into your desired project, by clicking projects in the left menu and then clicking on the magnifying glass to the right of your project.



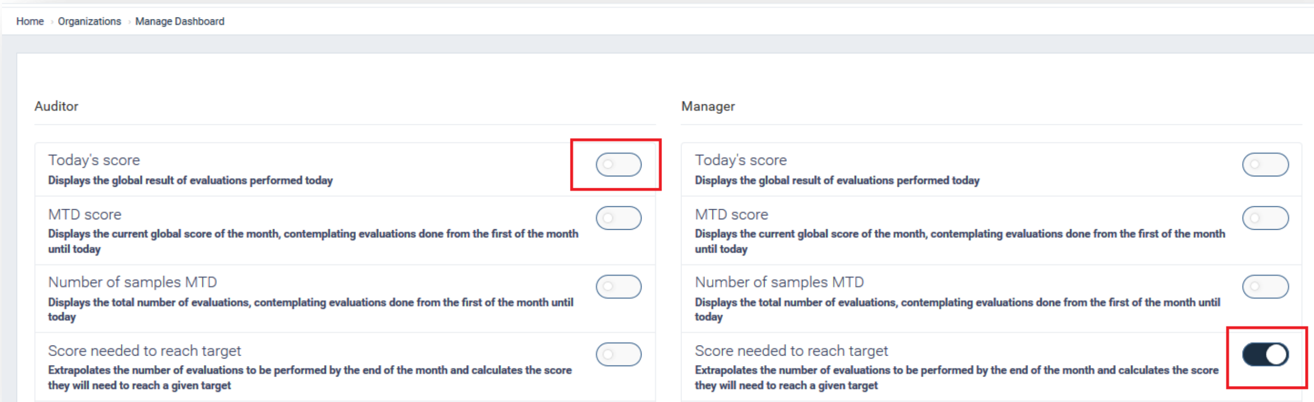

This will display the details of the project and from here you can generate a link or QR code for public evaluations.




The results of your evaluations will be reflected in our dashboards and reports. As a manager you will be able to decide which dashboards each role has access to. Reports are predetermined for each role. In order to manage dashboards you can go to "Dashboard" on the left menu and click on any of the cogwheels or by clicking on the organization icon on the top menu and clicking "manage dashboards".




In this panel you will see which dashboard item is active and inactive for each role. You can activate and deactivate by clicking on the toggle switch next to them.




You can add users and assign them a role and projects by going into the "users" in the Access Management area on the left menu and clicking add new.  For additional assistance please write to us at [support@quickaudits.io.](mailto:support@quickaudits.io)