

VICIDIAL

QUALITY CONTROL

MANUAL

v0.5 Beta (-r 72)

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QUICK START

Install on Each Server (only run sql on DB server)

Vicidial Version: 2.4-351a / BUILD: 111223-0043 (SVN Revision: 1766)

```
mkdir /usr/src/poundteam  
cd /usr/src/poundteam  
rm qc_install.sh  
wget http://www.poundteam.com/downloads/software/qc_install.sh  
/bin/bash /usr/src/poundteam/qc_install.sh
```

Configure Campaigns/Lists/Users

For Each Campaign

Detail View (top menu)

QC (top menu)

QC Enabled: Y

Check boxes for one or more Statuses

For Each List

Audit Comments: Y (Optional, only if using Audited Comments)

For Each QC User (such as 6666 or admin, plus any other QC users)

QC Enabled: 1

QC User Level: 1

QC Pass: 1

QC Finish: 1

QC Commit: 1

Agent Call Manual: 1

Agent API Access: 1

For Each AGENT (non QC, standard agents)

Agent-Only Callbacks: 1

Agent Call Manual: 1

Notes:

Campaigns with QC active will now appear under the “Quality Control” left menu.

Calls dispositioned in one of those campaigns with a QC selected status will appear under the Campaign.

Clicking on each lead will allow the QC agent to “Pass/Fail/Cancel” each lead. Fail will appear in the “Callbacks” for the originating agent to “re-sell” or fix the problem(s) with the sale.

If activated, Audited Comments will be visible in QC Modify Lead (NOT in “Comments” for each lead, they are removed from this editable field and placed in a view only table!). Agents may view comment history when on a call with a client who has comment history. Administrators must be in QC Modify Lead to view comment history.

INSTALLATION

Prerequisites

Vicidial VERSION: 2.4-351a / BUILD: 111223-0043 (SVN Revision: 1766)

Beta Note: This installation is designed specifically for Vicibox stock installation! I believe this is the stock version for Vicibox 3.1.14. Update the OS before the Vicibox installation, and NOT during installation (which will cause the SVN ON the cd to be used which should match revision 1766). Check your SVN version:

```
cd /usr/src/astguiclient/trunk
svn info
```

NOTE: IF YOU ARE NOT AT OR AFTER REVISION 1766, YOU MUST UPGRADE BEFORE PROCEEDING. THIS HAS NOT BEEN TESTED ONLY ON 1766.

Help with Vicidial upgrade if already in version 2.4 (first get the source via SVN):

Skip this if already at SVN revision 1766

```
cd /usr/src/astguiclient/trunk

svn up -r 1766
```

Then read the “UPGRADE” document (or continue with my instructions below if you are brave).

```
perl install.pl

mysql asterisk -e "select db_schema_version from system_settings;"
```

Now we must find this db schema version in the upgrade sql document (replace ##### with the db schema version)

```
grep ##### /usr/src/astguiclient/trunk/extras/upgrade_2.4.sql -n
```

Now we must delete all the lines before this from the sql upgrade document (replace ### with the line number returned at the beginning of the result of the grep command above). We will do this by copying from that line to the end into another file, then executing the other file’s SQL statements into our asterisk database.

```
cd /usr/src/astguiclient/trunk/extras/

tail +### upgrade_2.4.sql > upgrade_2.4MODIFIED.sql

mysql asterisk < upgrade_2.4MODIFIED.sql -p

reboot
```

You must have your MySQL root password during the installation. It may be blank.

```
mysql asterisk -e "UPDATE mysql.user SET Password = PASSWORD('XXXX')  
WHERE User='root';"
```

```
mysql asterisk --execute="FLUSH PRIVILEGES;"
```

Install

Acquire source files.

```
mkdir /usr/src/poundteam  
cd /usr/src/poundteam  
rm qc_install.sh  
wget http://www.poundteam.com/downloads/software/qc_install.sh
```

If you are using SVN within your development software, you will need to use the appropriate instructions for that environment, these instructions are specific for a production/test box only.

Install

```
/bin/bash /usr/src/poundteam/qc_install.sh
```

When prompted, enter mysql root user password

A reboot is not presently required (Alpha: Please let us know if your installation required a reboot)

Verify

Is there a New Top Level Menu?

Is “Quality Control” visible in Administration Logon menu? First change user 6666 to “Enable” QC and set QC level to the highest level. The Quality Control menu is at the same level as Campaigns and Users.

Upgrade

Preliminary upgrade procedure (not yet active!)

```
cd /usr/src/poundteam/qc  
svn up  
bash qc_upgrade.sh
```

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This command can be issued at any time for immediate upgrade to running system. This may change to a system more similar to Vicidial in the future to allow for download and installation.

CONFIGURATION / ADMINISTRATION SETUP

Each Campaign

Enable QC for each campaign

Detail View -> QC -> QC Enabled = Y

Choose QC Statuses

Check the boxes for each Status you want to be managed by the QC system. You can select just one (such as SALE), or you can select as many as you would like.

Any previously dispositioned leads with these statuses will automatically be included in the QC system, even though QC was not installed when they happened.

Each List

Enable Audited Comments for each List

Audited Comments = Y

Audited comments will move comments made by agents to a secure table where agents will be able to VIEW but not CHANGE those previous comments. They will also be available for VIEW in the QC system for modifying leads. This can also be accessed by those in the Admin Modify Lead page for those with QC privileges (link at the bottom of the page to move to the QC modify page, which will log all views/edits).

Note: This is optional and only applies if you want to activate the audited comments system. This will only affect campaigns on which it is turned on. This cannot be “deactivated” to retrieve the comments. Once comments are “audited” they are moved to a separate table and no longer editable or visible on the record except in the audited comments system.

Choose QC Statuses

Check the boxes for each Status you want to be managed by the QC system. You can select just one (such as SALE), or you can select as many as you would like.

Any previously dispositioned leads with these statuses will automatically be included in the QC system, even though QC was not installed when they happened.

Modify/Create System QC Results

Admin -> System Statuses -> QC Status Codes

Modify the names of the “CANCEL”, “PASS”, “FAIL” status codes to suit your needs (do not change the CATEGORY).

Note: We have not tested qc with different names. Please send feedback regarding success OR failure of changing the names!

Note: Creating new QC Results is (as yet) untested. (Alpha: use at your own risk, please report results)

Note: “Commit” category is not yet active (Can be created and possibly chosen, but will cause no “action” within Vicidial regarding QC).

Info Regarding QC Categories

“Cancel” category items will simply change the status to the given statuscode.

“Pass” category items will simply change the status to the given statuscode.

“Fail” category items will create a callback for the sales agent which will require that the sale be re-sold to get back to QC again.

Note: Fail category items require a MATCHING System Status or Campaign Status with “Schedule Callback” = “Y” to cause a callback to be created.

Note: Adding new “Fail” or other QC Results is (as yet) untested. . (Alpha: use at your own risk, please report results)

Standard and QC User requirements

Regular users must have agent-only callback and Agent Call Manual (or they cannot call clients back for a QC reject, so this is required for QC callbacks).

Vicidial Administration->Users->(choose user)->Agent-Only Callbacks

Vicidial ADMINISTRATION

Users

- Show Users
- Add A New User
- Copy User
- Search For A User
- User Stats
- User Status
- Time Sheet

Campaigns

Lists

Quality Control

Scripts

Filters

Inbound

User Groups

Remote Agents

Admin

Reports

USER ADDED: 1000

MODIFY A USERS RECORD: 1000

User Number: 1000 ?

Password: Weak ? Strength: Weak

Force Change Password: N ?

Full Name: Sample User ?

User Level: 2 ?

User Group: StandardAgent ?

Phone Login: ?

Phone Pass: ?

Active: Y ?

Voicemail ID: ? voicemail chooser ?

Email: ?

User Code: ?

Main Territory: ?

AGENT INTERFACE OPTIONS:

Agent Choose Ingroups:	1 ?
Agent Choose Blended:	1 ?
Hot Keys Active:	0 ?
Scheduled Callbacks:	1 ?
Agent-Only Callbacks:	1 ?
Agent Call Manual:	1 ?
Vicidial Recording:	1 ?
Vicidial Transfers:	1 ?

Agent Call Manual

Agent Call Manual: 1 ▼

QC Users must have Agent Call Manual (or they cannot call clients during QC)

Vicidial Administration->Users->(choose user)->Agent Call Manual

ADMINISTRATION

Users

USER ADDED: 1000

MODIFY A USERS RECORD: 1000

User Number: 1000 ?

Password: Weak ? Strength: **Weak**

Force Change Password: N ?

Full Name: Sample User ?

User Level: 2 ?

User Group: StandardAgent ?

Phone Login: ?

Phone Pass: ?

Active: Y ?

Voicemail ID: voicemail chooser ?

Email: ?

User Code: ?

Main Territory: ?

AGENT INTERFACE OPTIONS:

Agent Choose Ingroups: 1 ?

Agent Choose Blended: 1 ?

Hot Keys Active: 0 ?

Scheduled Callbacks: 1 ?

Agent-Only Callbacks: 0 ?

Agent Call Manual: 1 ?

Vicidial Recording: 1 ?

Vicidial Transfers: 1 ?

Agent Call Manual

Agent Call Manual: 1 ▼

User Level of 2 or greater

User Level: 2 ▼

QC Enabled

QC Enabled: 1 ▼

Agent API Access

Agent API Access: 1 ▼

QC User Level 1 (or higher, levels are not yet differentiated but will be as the package matures)

QC User Level: 1 ▼ ?

QC Pass / Finish / Commit – Not in use yet.

User Group settings for QC Allowed Campaigns / InGroups – Not in use yet.

STANDARD AGENT INTERFACE

QC Rejections will be received in “Callbacks”.

Method to resolve a QC Rejection: Manual dial client, correct errors and/or create new recording based on notes from QC agent in the QCFAIL callback record.

Agent Call Manual – Without this the agent cannot manual dial

Agent Call Manual: 1 ▼

Agent-Only Callbacks – Without this the agent will not see callback notification in agent window

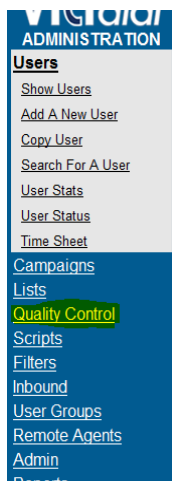
Agent-Only Callbacks: 1 ▼

QC USER INTERFACE

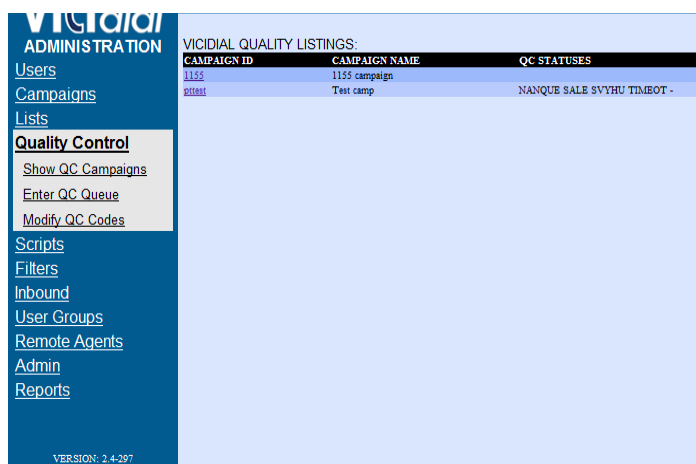
Note: Until there are QC campaigns with Sales in them ... there will be nothing to look at in the QC menu!

Enter the QC System

Admin->Quality Control



Choose a Campaign to QC



Select one record at a time to QC

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pttest - Test camp - Quality Control Queue
QC statuses: NANQUE SALE SVYHU TIMEOT

SALE (3)	LEAD ID	NAME	Last Modified
17	3890521021		2011-03-19 19:22:25
19	307398798		2011-03-19 19:40:30
20	916033244		2011-03-19 20:35:20

TIMEOT (1)	LEAD ID	NAME	Last Modified
9	307398798		2011-03-17 01:01:02

VERSION: 2.4-297

QC Each Record in Queue

With Each Record:

Listen to recordings listed at bottom of screen

To call client you must be logged in, in manual dial mode, in the correct campaign (Alpha NOTE: System does not presently verify Campaign!)

IF you call the client, disposition that call normally FIRST (as any agent would). THEN disposition in the QC window. Do not make changes in the AGENT screen (this may change in later versions), except to disposition at the end of the call.

After completing the call on the agent screen and dispositioning, choose your QC Result in the QC screen.

To set the call to FAIL (and require the original agent to re-call the client):

QC Result: FAIL
SUBMIT

If you want to make specific notes regarding the reason for the failure, they can be made in one of two ways:

1. Use the Comment field before submitting (*At present these notes will be editable / deletable by the agent*).
2. After submitting press [Go back to re-modify this QC lead](#) and modify the Callback Details. (*These will be temporary and viewable only by the agent during the call. However, in the future these will then appear with the Audited Comments because they are stored in the Vicidial callbacks table.*)

To specify a Date/Time other than “NOW” for the callback OR to schedule for a different user or to leave notes for the reason for the FAIL:

Press “[Go back to re-modify this QC lead](#)” on the resulting page

Then set the date/time/user

SUBMIT (at the bottom of the callback details, not the QC Result!)

When done, click on QC Campaign at the top of the page for your next record

Quality Control Log

Viewing:

The QC log records are only visible within the QC system. Each time a QC agent views or modifies a record, the view and all changes are logged. It can be viewed on each lead record along with the call and recording logs.

Log showing viewed*:

QUALITY CONTROL LOG RECORDS FOR THIS LEAD:								
#	DATE/TIME	OLD STATUS	NEW STATUS	QC USER	AGENT	CAMPAIGN	LIST	ELAPSED
1	2011-07-17 11:01:31	View Only - No changes		6666	1000	10000	989898	

Log showing modified*:

QUALITY CONTROL LOG RECORDS FOR THIS LEAD:								
#	DATE/TIME	OLD STATUS	NEW STATUS	QC USER	AGENT	CAMPAIGN	LIST	ELAPSED
1	2011-07-17 11:09:24	View Only - No changes		6666	1000	10000	989898	
2	2011-07-17 11:06:24	SALE	SALE	6666	1000	10000	989898	170 DETAILS

*Note: There will always be a “viewed” record as the last entry when YOU are VIEWING the record. Obviously.

Viewing actual changes to the record:

The record is viewed via the “tooltip” accessed by putting your mouse over the word “details”. We will later add a “Detail viewing page”. This function works well in IE, but in Firefox there is no “Line Ending” option in a tooltip, so the lines are not easily read.

179	DETAILS
17	DETAILS
29	DETAILS
133	DETAILS

-----modify_date-----
2011-07-17 11:04:34 => 2011-07-17 11:09:23
-----city-----
New York => Niagara Falls

Note for developers: All information for the viewed and modified records is stored in vicidial_qc_agent_log. All changes made to the vicidial_list record are stored in the “details” field.

NOTES

Testing: “QC Only” user modeled after “Reporting Only” user. Requires user level > 1, active = “Y”, and QC Enabled.

To QC Modify a lead that is NOT presently a QC status (whether it was in the past or not), search for and Modify the lead (under Lists->Search for a Lead), then click on “Click here to QC Modify this lead” at the bottom of the Admin Modify Lead screen (if you have QC permissions, this will be visible).