CSAT Admin User Guide

https://digidesk.citrustelecom.net/app2 | Username: Your email | Password: Firstname123#

Configuration

Voice Campaign

Name	Enter your Campaign name
Type	Voice Campaign
Service Number	Enter the main service number for your campaign
Question Settings	...
▸ Question Entry Field	Enter your question text here
▸ Question Label	Add a short description for use within the Score Breakdown widget
▸ Question Type	Select from; NPS, CSAT, Agent Performance, Multiple Choice and Yes / No question types, or Agent Performance average
Survey Settings	...
▸ Campaign Scale	Define the campaign scoring scale
▸ Score Direction	Define whether 1 = Negative or Positive
▸ NPS Range	Define whether NPS is calculated using 1-10 scoring scale or the Campaign Scale
Other Settings	...
▸ Use in Agent Desktop	Define whether the campaign is accessible via DigiDesk's Agent Desktop app
▸ Analyse Data	Define whether DigiDesk should analyse campaign data
▸ Colour	Pick a colour, used to represent the Campaign within Analysis and Reports

Digital Campaign: Standard & Bulk

Name	Enter your Campaign name
Type	Select your Campaign type
Name Used In Link	Potential to replace account name in survey link
Main Survey Link	This is the primary survey link and does not include Agent Tracking
Agent Survey Links	View each of the individual Agent Tracking links
Bulk Send (Bulk)	Enables CSV upload and scheduling
Template	Create a Plain Text or HTML outbound survey invite
Reminder (Bulk)	Set up and send automated Reminder Invites
Question Settings	
▸ Question Entry Field	Enter your question text here
▸ Question Label	Add a short description for use within the Score Breakdown widget
▸ Question Type	Select from; NPS, CSAT, Agent Performance, Multiple Choice and Yes / No question types, or Agent Performance average, Optional, and Comments

Configuration continued...

Digital Campaign: Standard & Bulk (continued)

Question Settings	...
▸ Display Based On	Configuration for Dynamic Routing
▸ Group Question	You can configure up to 4 questions within a Group Question
▸ Scale Type	Chose from a range of Scale Types
▸ Labels	Option to edit default campaign 'language' for Good, Neutral and Bad

Survey Settings	...
▸ Campaign Scale	Enter your question text here
▸ Score Direction	Add a short description for use within the Score Breakdown widget
▸ NPS Range	Define whether NPS is calculated using 1-10 scoring scale or the Campaign Scale
▸ Comment	Define whether to allow customers to leave verbatim comments
▸ Comment Compulsory	Define whether customer comments are compulsory

Survey Text (Selected)	...
▸ Introduction	Enter the survey intro text here
▸ Any Further C/ments	Enter the Any Further Comments text here
▸ Labels	Option to edit default survey text for a range of labels

Survey Design	...
▸ Logo	Enter your logo image URL (must be from a secure HTTPS source)
▸ Background	Enter your background image URL (must be from a secure HTTPS source)
▸ Colours & Fonts	Option to edit a range of default survey colours and fonts

Other Settings	...
Redirect URL	Requires URL for the redirections of expired links
Analyse Data	Define whether DigiDesk should analyse campaign data
Colour	Pick a colour, used to represent the Campaign within Analysis and Reports

Teams

Set Up Teams	Assign Agent to Teams with selected campaigns

Agents

Username	Define Agent usernames, used for platform login
Password	Define or update Agent passwords
Name	Define the [Agent Name] variable, used within Analysis and Reports
Team	Assign Team(s) to each Agent

Configuration continued...

Agents (continued)

Profile	Select from a range of pre-defined user profiles
Channel Settings	Define CSAT pin, where necessary
Other Settings	A range of additional settings. Speak with your account manager for more detail

Agent Profiles

Profile Name	Define Profile name
Role	Define Role used to populate default permissions
Campaigns	Select associated Campaigns
Permissions	Define a range of Permissions for the Profile

Settings

Alerts	Configure a range of real-time Alerts for the account
Bookmarks	Define settings for each Bookmark within the account
Keywords	Set up a range of Keyword queries for use within Analysis and Reports
Tags	Set up a range of Tags for tagging specific surveys

Administration

General Settings	A range of general account settings
Design Settings	Define the appearance and position of company logo(s) and branding
CSAT Settings	A range of CSAT specific settings

Advanced Settings

Custom Widgets	Configure Custom Widgets, with pre-defined parameters, for use within Analysis

digidesk

If you have any further queries around the Configuration options, please contact your account manager.