
survey app docs

Freetech Solutions

Jun 09, 2023

CONTENTS

1	What is i-Survey ?	1
2	Requirements	3
2.1	How can I get it ?	3
2.2	Survey Management	4
2.3	Survey Reports	11

WHAT IS I-SURVEY ?

Within the ecosystem of extensions and addons that can be added to OmniLeads, i-Survey allows us to guide a call (incoming or outgoing) to a telephone survey. Through a simple interface, the user will be able to design from very simple satisfaction surveys to the more complex polling campaigns with nested question trees.

All surveys can be analyzed through the report module, which allows us to break down in detail the feedback collected through the campaigns.

REQUIREMENTS

1. Versión mínima de OMniLeads instalada:
 - **OMniLeads 1.24.0** para la versión **1.0.4** del i-Survey Addon.
 - **OMniLeads 1.26.0** para la versión **1.1.0** del i-Survey Addon.
 - **OMniLeads 1.27.0** para la versión **1.1.2** del i-Survey Addon.

2.1 How can I get it ?

2.1.1 Installation

For installing this Addon, you should:

1. Download the .tar.gz that is available at [this URL](https://fts-public-packages.s3.sa-east-1.amazonaws.com/survey_app/survey_app-latest.tar.gz) **inside an instance with OMniLeads installed**, at the following location: `/opt/omnileads/addons`
2. Run the following commands as root user:

```
# cd /opt/omnileads/addons
# wget https://fts-public-packages.s3.sa-east-1.amazonaws.com/survey_app/survey_app-
↪latest.tar.gz
# tar xzvf premium_reports_app-latest.tar.gz
# cd premium_reports_app
# ./install.sh
```

1. The installer will tell you if it finishes successfully.
2. Run `service omnileads restart`, as the installer says.

2.1.2 OMniLeads Key Registration

It is mandatory that the instance is registered, action that is performed from the Help Menu > Register of the Administration Panel:

Users and Groups ▾

Campaigns ▾

Pauses ▾

Contacts ▾

Recordings

Telephony ▾

Reports ▾

Premium Reports

Help ^

Register

Insert your personal name or company name:

your_name

Insert your access password:

Insert your email:

your_email@domain.com

Insert your phone number:

3456789

Already registered

i-Survey está disponible para versiones de OmniLeads 1.27.0 o superiores. Si tiene dudas en cómo obtener la key de activación, contacte a info@omnileads.net.

2.1.3 About Licensing

i-Survey is a commercial module, that is the reason why its operation depends on product activation.

The licensing scheme is permanent (definitive key), and 1 year of updates are provided for bug-fixing coverage and new features on the installed release. If you need release upgrades but your current one exceeds the year of purchase, the key can be updated with a moderate cost.

The key allows to activate the module in 1 (one) single instance at a time, and has no limit related to the number of agents operating on the platform.

If you have doubts on how to obtain the activation key, contact info@omnileads.net.

2.2 Survey Management

2.2.1 Audios

Each survey involves 3 audio classes to play:

- Initial Greeting
- Final Greeting
- Questions

Before creating our surveys, we need to make sure to upload previously the audios involved in it using the module OMniLeads audios: *Telephony -Audios - Custom Audios*.

Once the audios are available in our Survey, then let's move on!

2.2.2 New Survey

The i-Survey Addon should be displayed within the Main Menu:

OMniLeads español (es) Salir

- Usuarios y grupos
- Campañas
- Pausas
- Contactos
- Buscar Grabación
- Buscar Auditorías
- Telefonía
- Reportes
- Encuestas**
- Supervisión
- Ayuda

Nombre ↑↓	Estado ↑↓	Timeout	Time retray	Options
inamu	pendiente	6	3	
presidenciales 2021	pendiente	4	4	

<< < 1 > >>

From there we can generate a new Survey:

New Survey

Save Cancel

Nombre

calidad_post_atencion

Timeout

3

Time retry

4

Max retries

3

Start audio

calidad_saludo



















End audio

sondeo_despedida

The first survey creation view involves the following fields:

- **Name:** The name that the new survey will have.
- **Timeout:** The tolerance time in which a DTMF response is expected as interaction.
- **Time retry:** The time it will wait to play again each question.
- **Retry:** The number of times to tolerate an invalid DTMF response as an option.
- **Start audio:** The audio that is triggered as a welcome message in each call transferred to survey.
- **End audio:** The audio that is triggered at the end of the survey.

Once the form is completed, the survey becomes available for following its preparation, assignment and subsequent publication.

+ New				
Nombre ↑↓	Estado ↑↓	Timeout	Time retray	Options
inamu	PUBLISHED	6	3	     
presidenciales 2021	PUBLISHED	4	4	     
calidad_post_atencion	UNPUBLISHED	3	4	     
<< < 1 > >>				

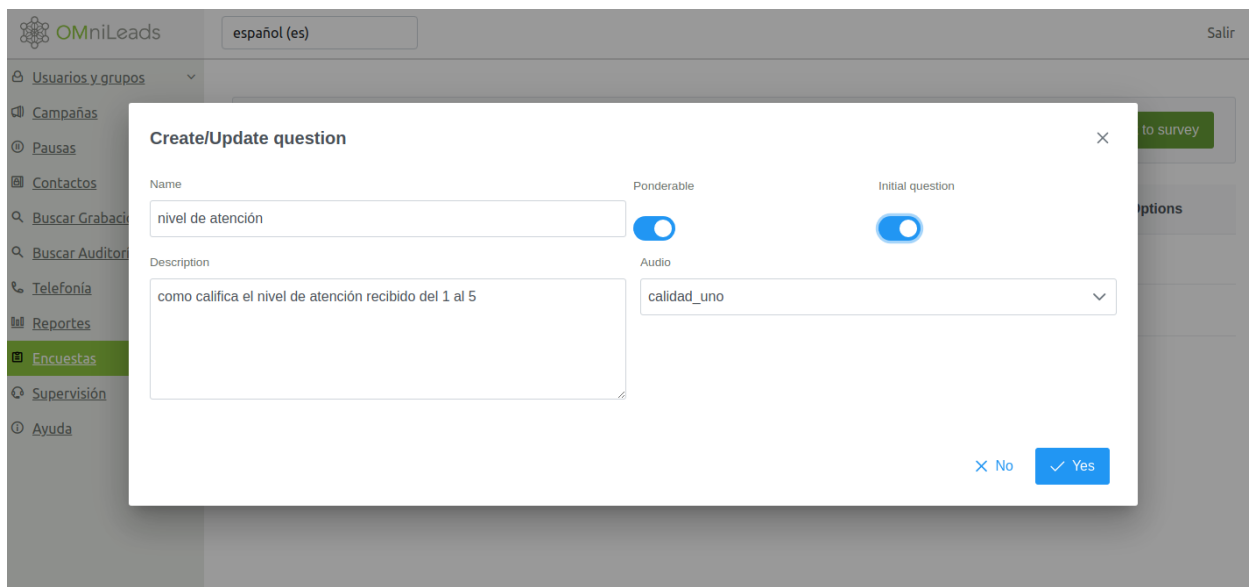
2.2.3 Preparation of questions

In the correct order, we should first generate all the questions that are going to make our survey, and then begin to associate the possible answers on each question and their actions to trigger. Now we are going to focus on the questions, to do so click on the icon which has a ‘?’ within the survey.

Let’s try an example, a post-care satisfaction survey is considered of two questions:

As can be seen in the preparation of the question, we only indicate the audio to play, a name for the question, a description and then we specify if it is the first question and if the question is ponderable, that is to say we will show the results as an average.

- How would you rate the level of care received from 1 to 5



Create/Update question

Name: nivel de atención

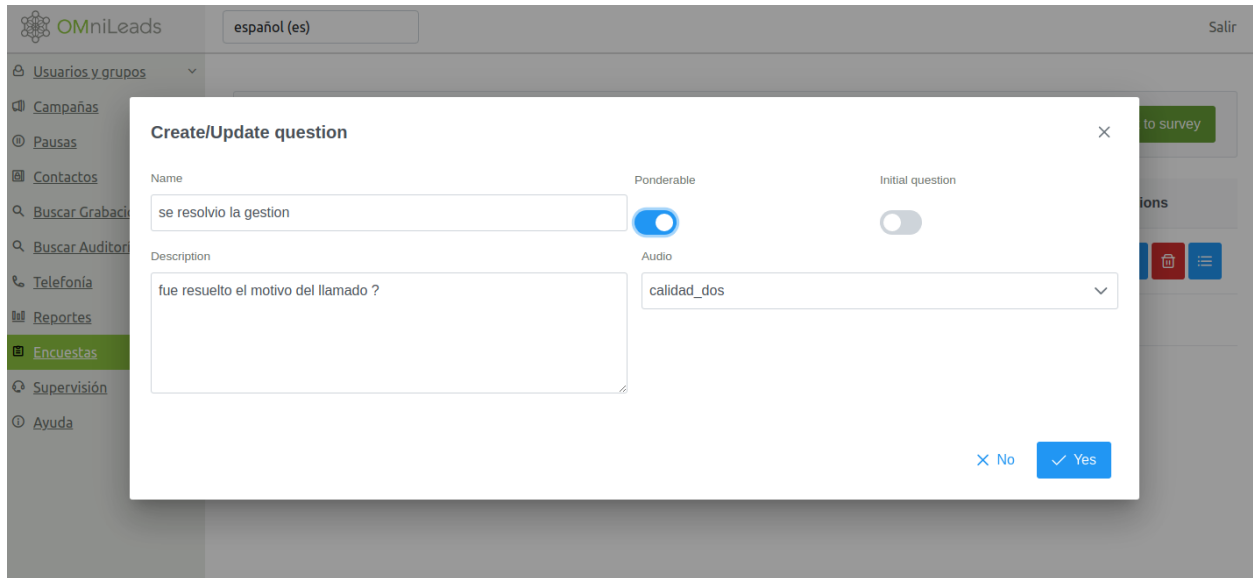
Description: como califica el nivel de atención recibido del 1 al 5

Ponderable: ☒

Initial question: ☒

Audio: calidad_uno

- The reason for your call has been resolved



2.2.4 Preparation of answers for each question

Once all the questions have been generated, the expected answers should be created for each question along with the action that each one should trigger. Following our example, there are two questions:

+ New		← Back to survey			
Name ↑↓	Description ↑↓	Audio ↑↓	Ponderable ↑↓	Initial question ↑↓	Options
se resolvió la gestión	fue resuelto el motivo del llamado ?	17	true	false	<div> <div></div> <div></div> <div></div> </div>
nivel de atención	como califica el nivel de atención recibido del 1 al 5	16	true	true	<div> <div></div> <div></div> <div></div> </div>

Next, we work with the preparation of answers for the initial question:

Create/Update option

DTMF

1

2

3

4

5

6

Calification

excelente

Action

Next question

Next question

se resolvio la gestion

No

Yes

As you can see, each expected DTMF is associated as response with an action:

- Finalize
- Repeat
- Next Question

As we can see, each of the answers lead to play the next question, that is question number two of the survey.

+ New

← Back to Question

Id ↑↓	DTMF ↑↓	Action ↑↓	Calification ↑↓	Options
27	1	Next question	excelente	<div><div></div><div></div></div>
28	2	Next question	muy bien	<div><div></div><div></div></div>
29	3	Next question	bueno	<div><div></div><div></div></div>
30	4	Next question	regular	<div><div></div><div></div></div>
31	5	Next question	malo	<div><div></div><div></div></div>

Note: This does not necessarily have to be that way. In a more complex example, many questions could nest at different levels forming a tree of the desired complexity.

The second and last question in our example:

+ New		← Back to Question		
Id ↑↓	DTMF ↑↓	Action ↑↓	Calification ↑↓	Options
32	1	Finalize	fue resuelto	✎ ✖
33	2	Finalize	no fue resuelto	✎ ✖

Each of the answers to this question has the action of ending the survey.

2.2.5 Assignment and publication of the survey to production environment:

The survey should be associated to a campaign.

Assign campaigns



















Nombre ↑↓	id	Active	Options
test_entrante_campaign	2	true	Remove



















<< < 1 > >>

[✕ Exit](#)

Note: Only one survey can be associated to a campaign. It is not possible to associate a survey to more than one campaign.

Finally, to leave the survey in production, it should be published.

Nombre ↑↓	Estado ↑↓	Timeout	Time retray	Options
inamu	PUBLISHED	6	3	     
presidenciales 2021	PUBLISHED	4	4	     
calidad_post_atencion	UNPUBLISHED	3	4	     

Nombre ↑↓	Estado ↑↓	Timeout	Time retray	Options
inamu	PUBLISHED	6	3	     
presidenciales 2021	PUBLISHED	4	4	     
calidad_post_atencion	PUBLISHED	3	4	     

<< < 1 > >>

2.2.6 Transferring the call to the survey

For a post-call survey, the agent should transfer the call to the survey configured for the campaign. To do this you should click on the *transfer* button from which a modal window is displayed with the specified option to survey destination.

Transferir



Tipo de transferencia: ☐ Ciega ☐ Asistida

☐ a Número

☐ a Campaña

test_entrante_campaign



☐ a Agente



☐ A lista rápida

Transferir a Encuesta

Hecho

2.3 Survey Reports

2.3.1 Reports Filter

By clicking on the reports icon, the Advanced Filter is displayed from the Survey module, where you can select:

- Date Range: Period of time for the results evaluation of the quality survey.
- Campaigns: The campaign involved in the survey.
- Agents: The agents that are audited from the survey.
- Groups: The groups of agents that are audited from the survey.

Reportes de la encuesta: isurveyTest[← De regreso a Encuesta](#)

Filtros

Rango de fecha
13/04/2022 - 13/04/2022

Campañas
INCRM

Agentes
Selecciona Agentes

Grupos
Selecciona Grupos

🔍 Buscar

📄 Descargar csv

By pressing the “Search” button, the multiple results related to the survey are displayed. On the other hand the button “Download CSV” allow us to obtain a file in CSV/Excel format from which a record sheet / CSV file is obtained with all the call transactions and recording audio paths associated. The survey options selected by caller are also shown for each of the survey sections.

2.3.2 Report Results

A la hora de evaluar los reportes de encuestas, partimos de una serie de Tabs que organizan la información en diferentes secciones:

- Reporte General: ofrece cantidades de llamadas derivadas a encuesta, completadas, parcialmente completadas y abandonadas durante la reproducción de los audios asociados.

Report Results

General Report

Ratings by question

Replies by agent

Replies by date

Agent Averages

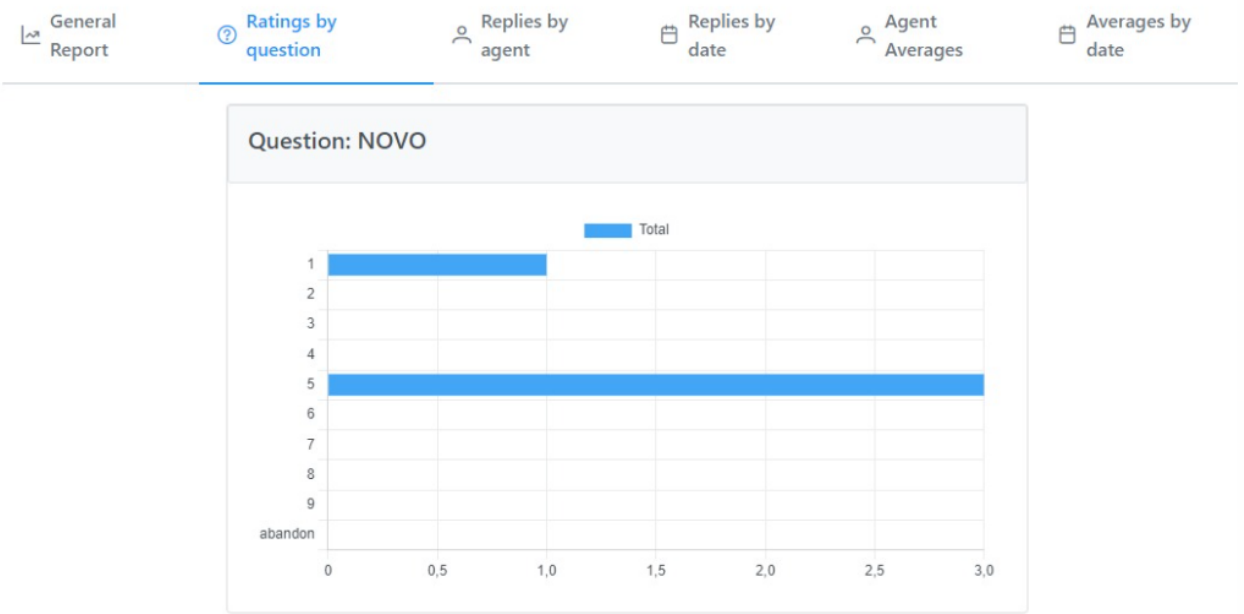
Averages by date

Campaigns survey	Quantity
derived	4
complete	4
partial	0
abandon	0

Después, abraza grande

- Ratings by Question: for each question in the survey, the different ratings made by the caller at the time of answering the survey.

Report Results



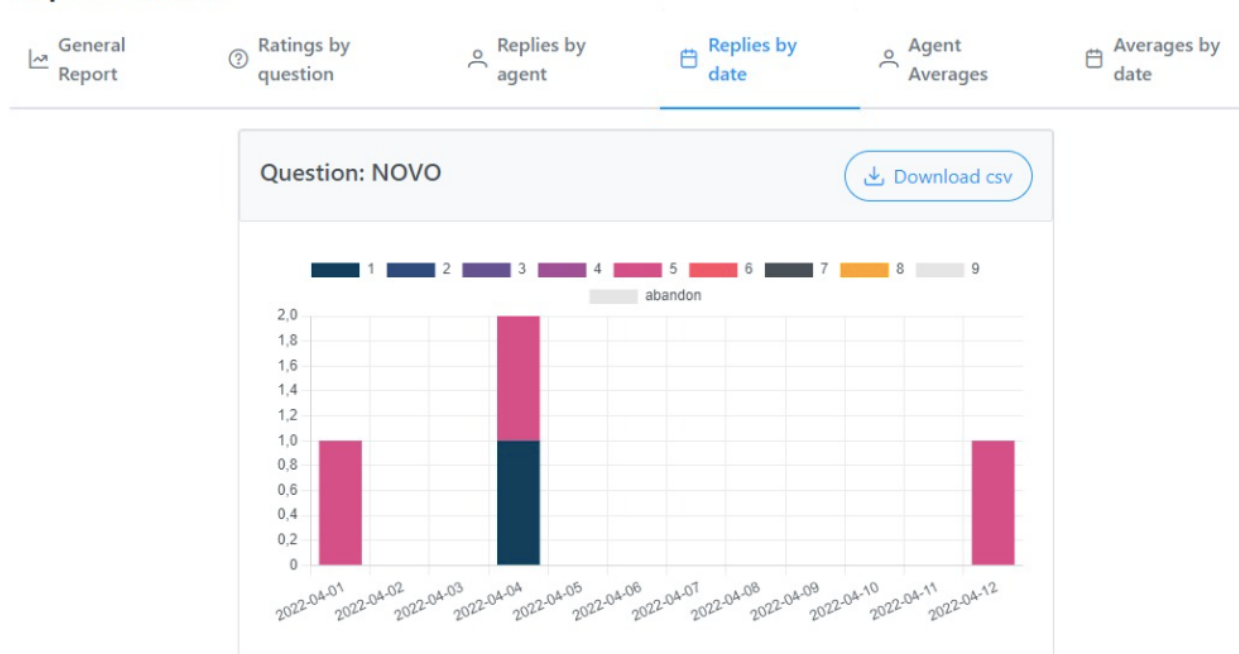
- Answers by Agent: for each question of the survey, the different options selected by the caller are plotted, for agent.

Report Results



- Answers by Date: for each question of the survey, the different options selected by the caller are displayed, by date.

Report Results



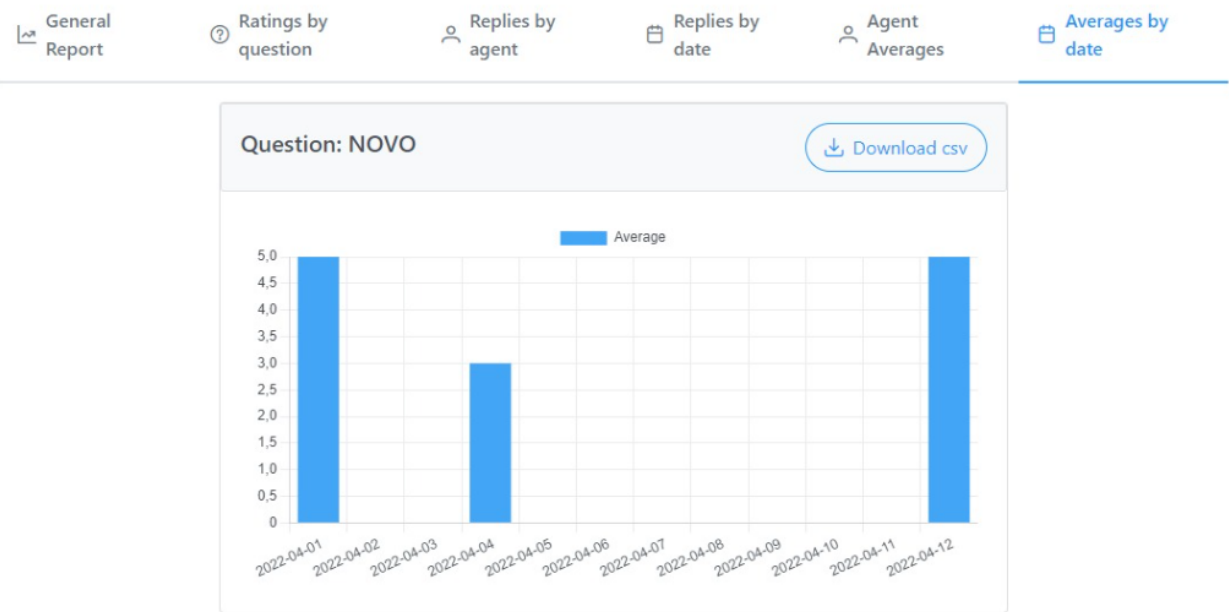
- Averages by Agent: for each “weighted” question, the average of the options selected by the caller, per agent.

Report Results



- Promedios por Fecha: para cada pregunta “ponderada”, se obtiene el promedio de las opciones seleccionadas por el llamante, por día.

Report Results



It is important to mention that all of the report sections presented in the different views and graphs, are exportable to CSV/EXcel for a correct analysis.

A	B	C	D	E	F	G	H	I
Teléfono	Callid	Fecha	Grabación	id_contacto	Agente	Opcion123	Opcion1a15	Si resolvió 1 o 2
5569837744	1649425568.82	08/04/22 13:46	Inbound-202204081046-31-5569837744-1649425568.82		agente1 agente1	(1) - Vendedor		
9118088112	1649365868.53	07/04/22 21:11	Inbound-202204071811-31-9118088112-1649365868.53		agente1 agente1	(2) - Representante	(5) - Excelente	(2) - No Resolvio

Date	Average
2022-03-01	3,8
2022-03-02	4,9
2022-03-03	2,2
2022-03-04	4,5
2022-03-05	4,9
2022-03-06	3,9
2022-03-07	0

Agent	Average
Isaac Newton	5
Deep Smith	3

date	Resolvió	No Resolvió	Abandonó
2022-03-01	54	1	0
2022-03-02	66	3	2
2022-03-03	87	6	1
2022-03-04	0	0	0