



# Call Reporter Pro Software

Call Management Features

**User Guide**

**Version 1.05**

Date & Issue: Issue 1 – June 2017

[www.usbcallrecord.com](http://www.usbcallrecord.com)

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## Introduction

The purpose of this document is to describe the features and functions of Call Reporter Pro.

This user guide will take the user through the installation and setup of the Call Reporter Pro and help guide the user through the advanced search and playback features provided when used as an Administration Software for the Intelligent Recording family of Call Recording products.

### Important Notes:

For support and product information and manuals please go to our website [www.usbcallrecord.com](http://www.usbcallrecord.com)

**Contact USA** +1 800-930-8135 , Dial 2 for technical support

**Contact UK** +44 (0) 1909 512 148

**PC Compatibility:** The Call Reporter Pro Administration software supplied will work on recent Microsoft operating systems including Windows 7, 8 & 10, 32 or 64 bit systems. **Note:** Mac OS is not supported.

### Contents

- 1 x XTR Dongle Protection Device
- Software to be downloaded from <http://www.usbcallrecord.com/index.php/download>

**Caution!** *The use of monitoring, recording or listening devices to eavesdrop, monitor, retrieve or record telephone conversations or other sound activities, whether or not contemporaneous with transmission, may be illegal in certain circumstances under federal or state laws. Legal advice should be sought prior to implementing any practice that monitors or records any telephone conversation.*

## Installation of Software

### 1. Download & Install the Software

- a. Login into the PC using an admin login, then download the software from the link provided (note location that the file is being downloaded to).
- b. Click on downloaded file and the executable within, this will start the installation process.
- c. Accept License agreement
- d. Install to desired location, default location is recommended.

### 2. Install Software License Key

The Call Reporter Pro software is provided with a software license dongle that must be installed in a USB Port on the computer you have installed the software.

**Important Note: Call Reporter Pro will not operate without the USB key installed.**

If upgrading from an older version of XTR software, you may be able to add the license for this product using the same key, please contact our tech support for more information.

#### SecureDongle X USB driver installation

The SecureDongle X uses a driver included in the Windows operating system. When the SecureDongle X is inserted into the USB port, the operating system may prompt install a new device, which will then install automatically.



to

### 3. Starting Call Reporter Pro

Call Reporter Pro can be started by locating the Call Reporter Pro2 Desktop Icon and double clicking or by choosing the Call Reporter Pro2 option in your Windows Start Menu listed under Intelligent Recording.

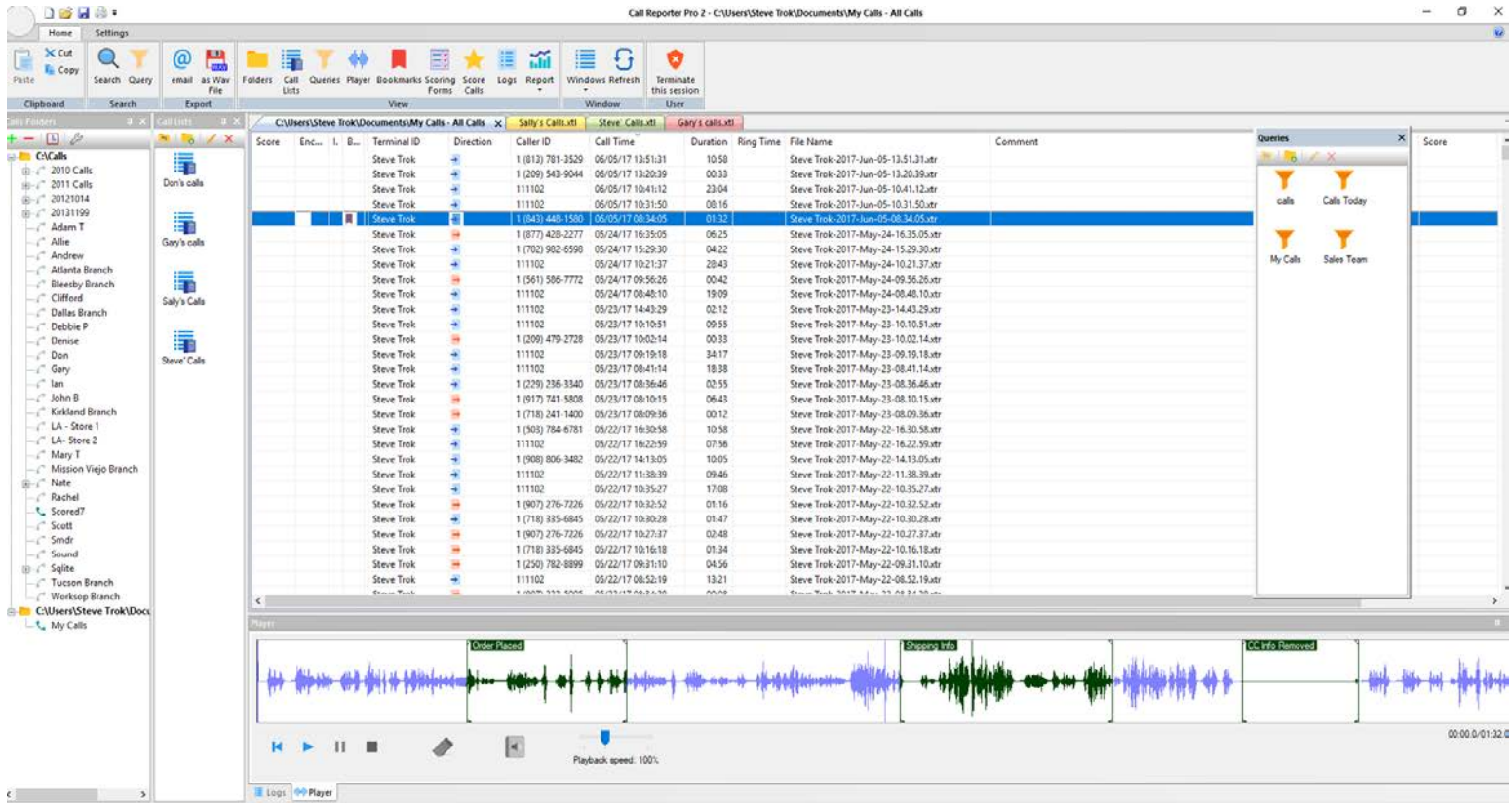


### 4. First Time Log-In

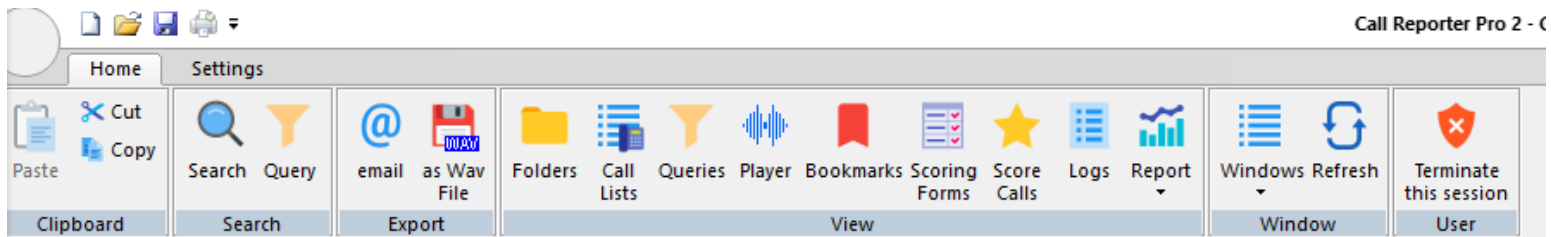
The default user ID is **Call Reporter Pro** leave the Password section blank. Remember to capitalize the first character of each word and provide a space between the words.

## Main Window Interface

The Main window appears when the application starts. The look and feel of the program can be customized in order to provide easy access to those features most commonly used.



## Main Menu Features



- The Main Menu provides access to the primary application controls.
- It is located at the top of the Main Window.

## User Set-Up

### Set Up User Log-Ins

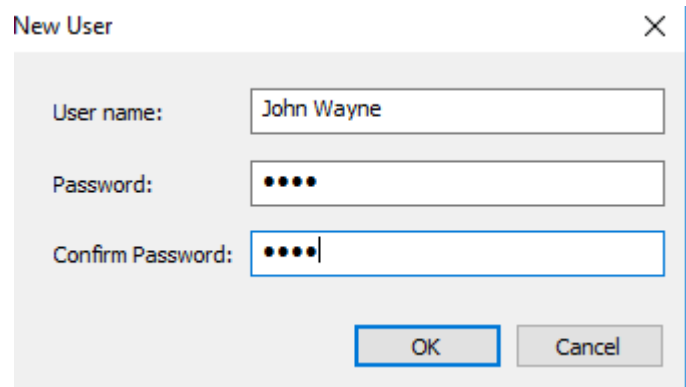
The first step in setting up the application is to create your login IDs. It is important to create a separate user ID for each user so that tracking of any playback or modifications to the files is possible.

a. From Main Menu Bar , select **Settings** Tab.



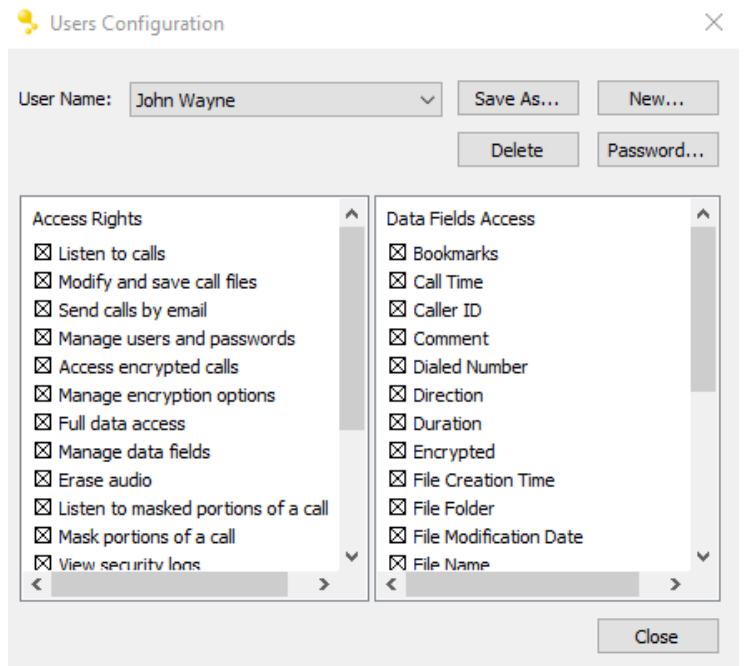
b. Create New User

1. Select Users
2. Select 'New'
3. Enter Name and Password
4. Click OK



c. Set Restrictions of Feature Access if required

1. Select User in drop-down menu
2. Select desired functions to provide access.
3. Select Close, your changes will be saved.



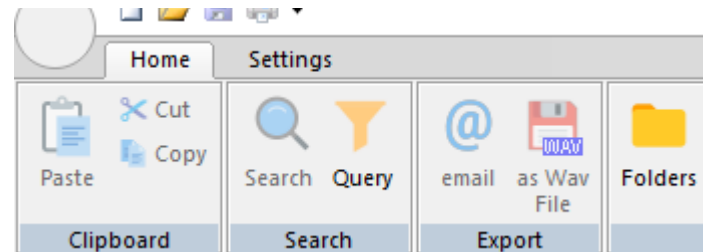
d. Remove default User if desired

1. Select User Call Reporter Pro, then select delete

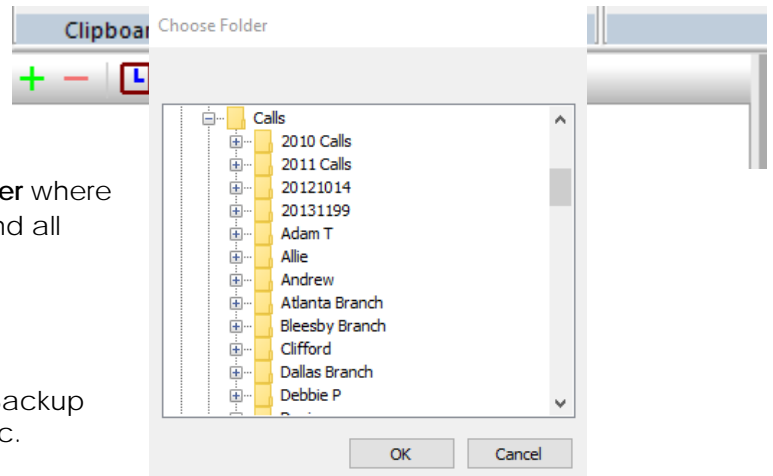
## Create Calls Folders

*Note: It is important that the Call Recording system be installed first and that the folder structure established for the Call Recording system prior to setting up the calls folders. It is recommended that a Parent folder "Calls" be created, with an individual folder for each user under it.*

- a) **Select Folders from the Main Menu** if the Folders Panel is not already in view.



- b) From the Panel, **select the green "+" sign** to add a watch folder.



- c) **Select the Location of the main Parent Folder** where calls are stored. Select the parent folder and all child folders under it will also appear.

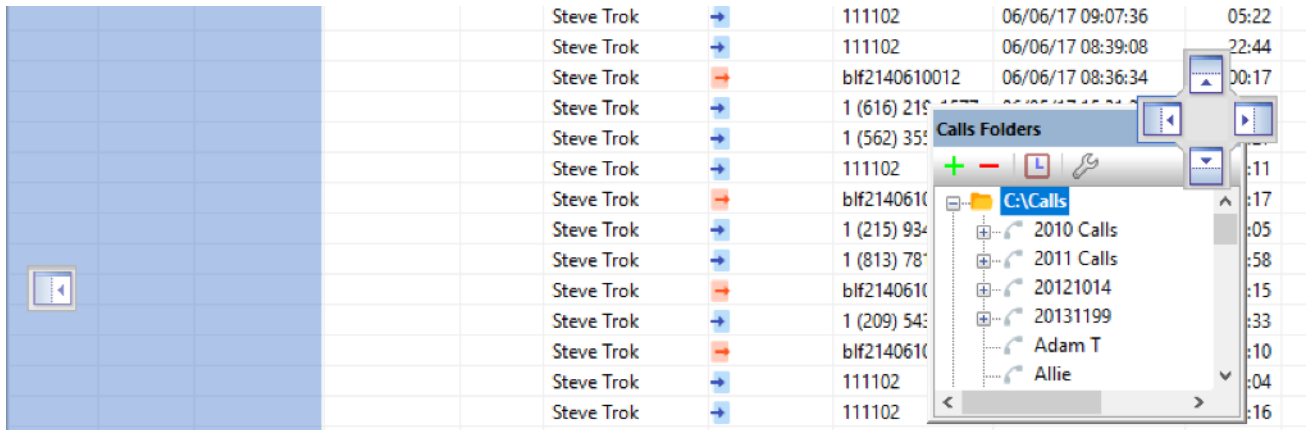
- d) Add any other watch folders required, ie. Backup locations, other office locations , groups etc.

## Organizing Panels

The Access Panels are dynamic panels that can be organized and set to allow the user access to their most commonly used functions of the program such as Calls Folders, Call Lists, Queries, and Player Panel etc.

These Panels can be moved and set in place by right clicking and holding the panel, then dragging the mouse indicator through the directional arrows that appear which will then highlight where the panel will be pinned on the user screen if the mouse is release, as shown below in blue (see below). In this case, the mouse indicator was located on the left arrow and the panel will be pinned on the left of the user interface.

All frequently used panels can be pinned, left to float or minimized.



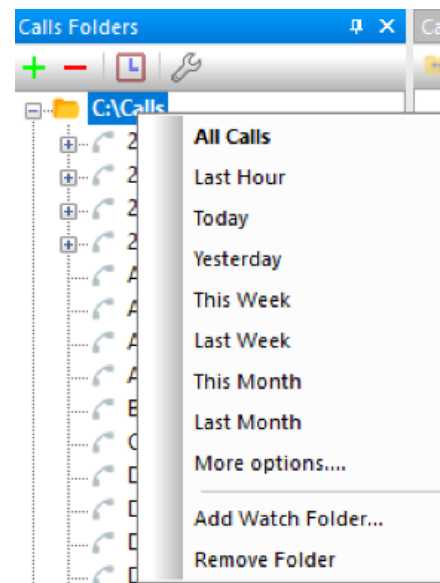
## Compiling Calls and Basic Searching

### a) Compile Calls

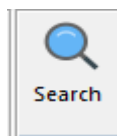
To compile a list of calls, right click on the folder that contains the calls to be reviewed, by user or group folder. This will bring up the option to select all calls, or filter by date or time range.

'More options' brings up advanced search criteria where the search can be extended to include Caller ID or User. It is also possible to search by caller ID after compiling a list of calls by using the Search option from the main menu as shown below.

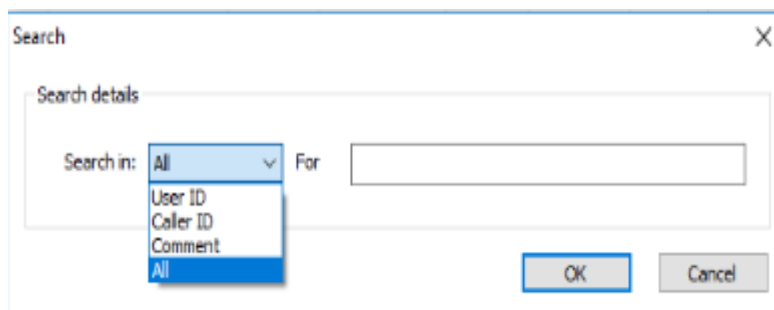
*If upgrading from an earlier version of Reporter Pro and there are a large number of calls stored, the initial compiling may take several minutes, after the first use the search time will be very fast.*



### b) Search Function



The Search option on the Main Menu bar provides for additional search criteria once a call list has been created. Additional filtering can be done by User ID, Caller ID or Comments made about the call.





### c) Compiled Calls

Once the calls matching the search criteria have been compiled, they will appear in the main window of the program.

Calls can then be sorted by any column by clicking on the column or an additional search can be done by using the Search option.

If you have multiple search results, they will tile across as shown in the example below:

Important	Direction	Terminal ID	Caller ID	Call Time	Duration	Bookmarks	Score	Ring Time	Notes	Encryp...	File Name
	→	Steve Trok	1 (646) 749-3112	06/06/17 13:26:57	48:43						Steve Trok-2017-Jun-06-13.26.57.xtr
	→	Steve Trok	111102	06/06/17 13:06:13	13:27						Steve Trok-2017-Jun-06-13.06.13.xtr
	→	Steve Trok	1 (518) 462-8659	06/06/17 12:43:45	03:25						Steve Trok-2017-Jun-06-12.43.45.xtr
	→	Steve Trok	1 (406) 548-1599	06/06/17 11:21:00	02:44						Steve Trok-2017-Jun-06-11.21.00.xtr
	→	Steve Trok	1 (414) 831-5835	06/06/17 11:06:19	01:01						Steve Trok-2017-Jun-06-11.06.19.xtr
	→	Steve Trok	1 (716) 250-7777	06/06/17 10:53:57	02:50						Steve Trok-2017-Jun-06-10.53.57.xtr
	→	Steve Trok	111102	06/06/17 10:10:37	05:37						Steve Trok-2017-Jun-06-10.10.37.xtr
	→	Steve Trok	1 (406) 251-2404	06/06/17 09:56:32	01:22						Steve Trok-2017-Jun-06-09.56.32.xtr
	→	Steve Trok	111102	06/06/17 09:42:46	12:23						Steve Trok-2017-Jun-06-09.42.46.xtr
	→	Steve Trok	1 (803) 600-0738	06/06/17 09:36:06	05:02						Steve Trok-2017-Jun-06-09.36.06.xtr
	→	Steve Trok	1 (703) 766-7060	06/06/17 09:13:03	03:13						Steve Trok-2017-Jun-06-09.13.03.xtr
	→	Steve Trok	111102	06/06/17 09:07:36	05:22						Steve Trok-2017-Jun-06-09.07.36.xtr
	→	Steve Trok	111102	06/06/17 08:39:08	22:44						Steve Trok-2017-Jun-06-08.39.08.xtr
	→	Steve Trok	1 (616) 219-1577	06/05/17 15:31:26	00:01						Steve Trok-2017-Jun-05-15.31.26.xtr
	→	Steve Trok	1 (562) 355-8957	06/05/17 15:26:36	00:27						Steve Trok-2017-Jun-05-15.26.36.xtr
	→	Steve Trok	111102	06/05/17 14:32:40	19:11						Steve Trok-2017-Jun-05-14.32.40.xtr
	→	Steve Trok	1 (215) 934-7888	06/05/17 14:29:20	02:05						Steve Trok-2017-Jun-05-14.29.20.xtr
	→	Steve Trok	1 (813) 781-3529	06/05/17 13:51:31	10:58						Steve Trok-2017-Jun-05-13.51.31.xtr
	→	Steve Trok	bif2140610012	06/05/17 13:29:18	00:15						Steve Trok-2017-Jun-05-13.29.18.xtr
	→	Steve Trok	111102	06/05/17 10:41:12	23:04						Steve Trok-2017-Jun-05-10.41.12.xtr
	→	Steve Trok	111102	06/05/17 10:31:50	08:16						Steve Trok-2017-Jun-05-10.31.50.xtr
	→	Steve Trok	111102	06/05/17 09:01:08	08:03						Steve Trok-2017-Jun-05-09.01.08.xtr
	→	Steve Trok	1 (843) 448-1580	06/05/17 08:34:05	01:32						Steve Trok-2017-Jun-05-08.34.05.xtr
	→	Steve Trok	1 (877) 428-2277	05/24/17 16:35:05	06:25						Steve Trok-2017-May-24-16.35.05.xtr
	→	Steve Trok	1 (702) 982-6598	05/24/17 15:29:30	04:22						Steve Trok-2017-May-24-15.29.30.xtr
	→	Steve Trok	111102	05/24/17 10:21:37	28:43						Steve Trok-2017-May-24-10.21.37.xtr
	→	Steve Trok	bif2140612012	05/24/17 10:19:14	01:18						Steve Trok-2017-May-24-10.19.14.xtr
	→	Steve Trok	bif2140610012	05/24/17 10:18:09	00:15						Steve Trok-2017-May-24-10.18.09.xtr
	→	Steve Trok	1 (561) 586-7772	05/24/17 09:56:26	00:42						Steve Trok-2017-May-24-09.56.26.xtr
	→	Steve Trok	111102	05/24/17 08:48:10	19:09						Steve Trok-2017-May-24-08.48.10.xtr

#### 1, Inbound vs Outbound Calls

Inbound calls are designation by the orange colored icon, outbound calls by the blue. Calls can easily be sorted by inbound versus outbound by clicking on the column header. Please note that call direction is not available with all types of recorders, specifically Digital Station side recorders typically do not support the call direction feature.

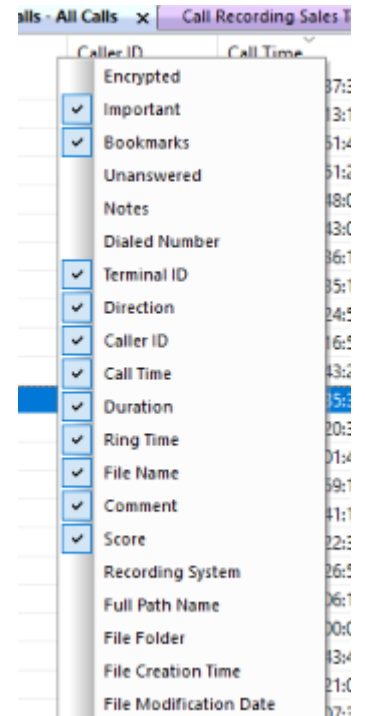
## 2. Comments

Comments or notes can be also added to the call by clicking in the comments column of the recorded call and typing in the field. Once done, these notes can also be used to search for that specific call.

## 3. Column Customization

The Data Columns can be moved by dragging them to different positions in the menu bar.

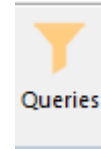
Additionally, by right clicking on the Compiled Call List Menu bar the visible fields can be customized to be shown or hidden. Options that are available to be displayed/hidden are shown on the right.



## Creating and Using Queries

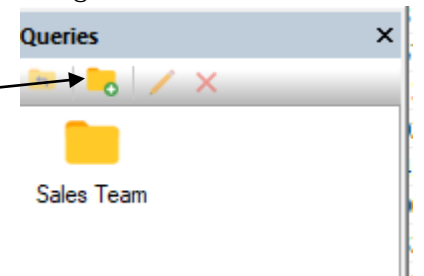
Queries are stored search criteria to make frequent searches quicker and easier. For example, a common query would be to search the Sales Teams for calls for this week's calls. It is also a simple way to Group Users together and organize users into the groups within your organization.

1. Select **Queries** from the Main Menu this opens the Queries Panel

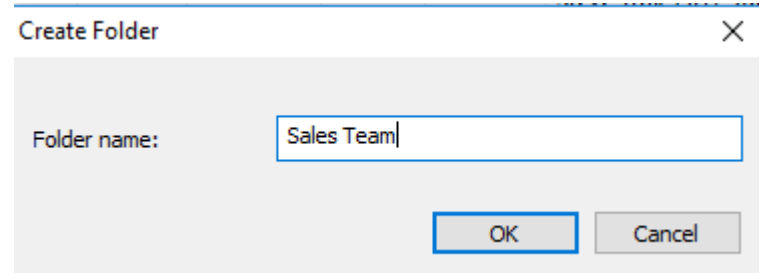


2. **Queries Folders** - If there are multiple groups and it is desirable to have multiple queries for each group, it may be easier to first create group folders. ie Sales Team, Service, Accounting etc.

- a. To create a folder Select New Folder Option

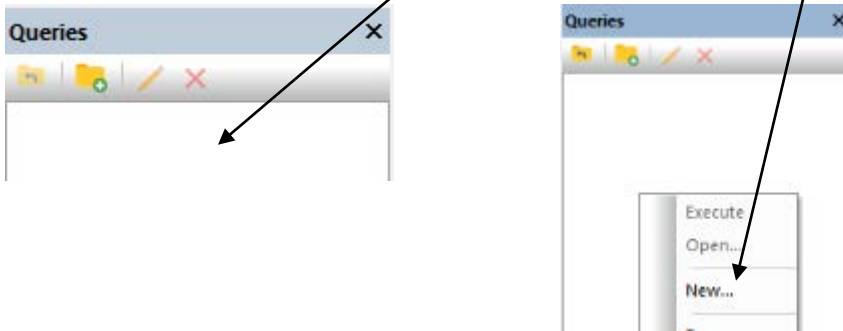


- b. Name the Query Folder, Click OK



3. If a group folder was created, Double Click on the Query Folder to open, then follow the instructions below on creating a query, the queries for each group will be creating in each group folder.

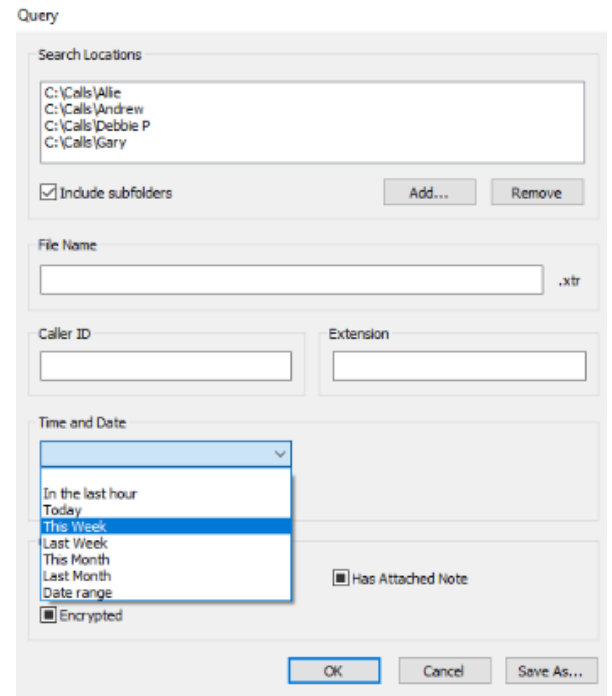
4. To Create a Query , Right-Click in the blank space and select 'New'



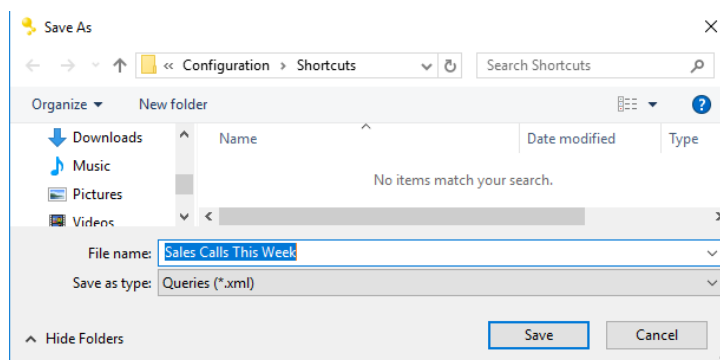
5. Create the Query

a. Click 'Add' , then browse to the Main Calls Folder location and select the users to add into the Group for this Query

b. Select the Time Frame , in this case 'This Week'

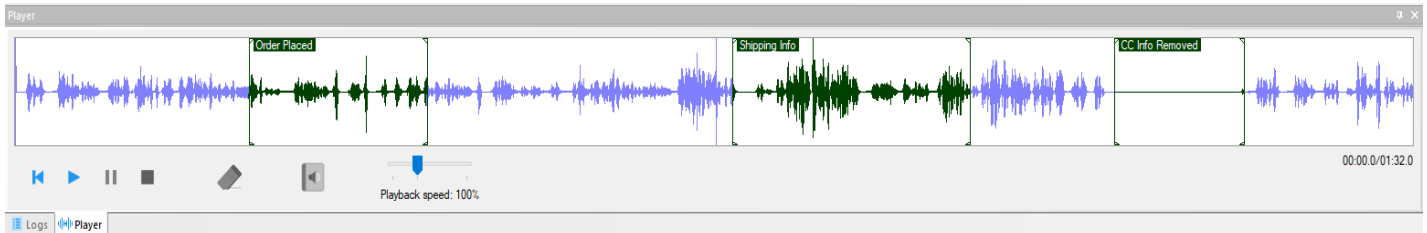


c. Once created, select Save As and Name the Query and place in to the appropriate Folder if created, if no Folders just select Save.



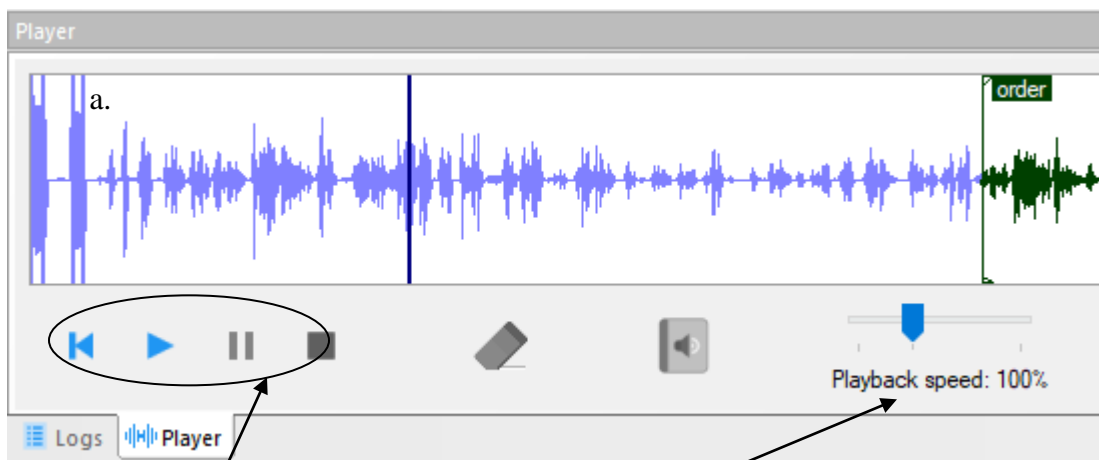
## Using the Player Panel

Once a recording has been located for playback, simply double-click on the recording in the list and it will launch in the player panel as shown below.



### 1. Playback Controls

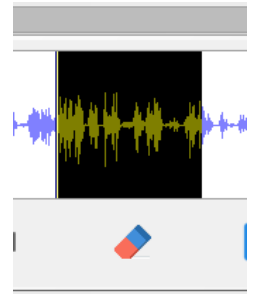
While the call is playing back the user can jump to any point of the conversation by clicking on the audio form displayed in the player panel.



a. **Play, Pause, Stop & Back to start**. These controls are used for common playback functions.

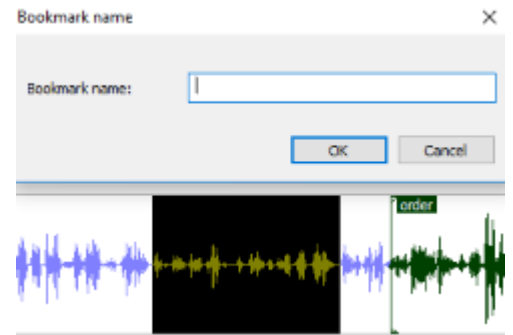
b. **Speed Playback** – this allows the user to speed up the playback in order to be more efficient in listening to a large number of calls.

- c. **Erase function** - This allows the user to remove sensitive information from a call. Select the portion of the call to be removed, then click on the erase icon. The erase icon will illuminate once a portion of the recording is selected.



*Note: This action is not reversible, if an original copy is needed, a copy of the recording should be saved first.*

- d. **Bookmark** - This allows the user to identify and label portions of a call for reference later, ie. Order Taken Here, Shipping info etc. As above, first highlight the section of the call, click on Bookmark icon, and then the Bookmark name box will appear, label the bookmark and click OK.



## Creating and Using Call Lists

Call List are used to organize calls to reference later or perhaps review with an employee(s) later for training purposes.

To access the Call List Panel, click on the call List icon on the main menu bar

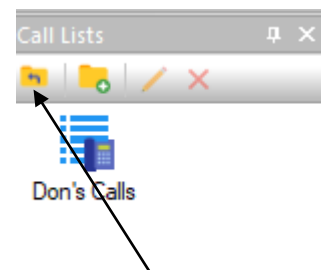
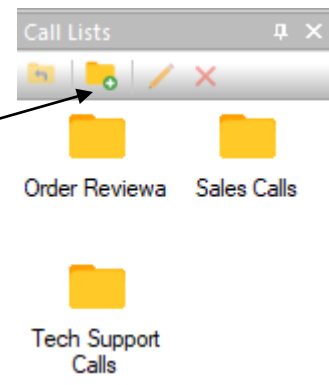
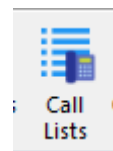
As with the Queries, Call Lists can also be organized by Folder (Group) or just created in the Main Panel view. In the example on the right, there are 3 Group Folders created, you would then create the desired Call Lists within each folder.

1) **Create Group Folder** – Click on New Folder and name Folder

2) **Create Call List** – List can be named for many purposes, It is common to have a Call List for each employee or category of call to be reviewed. To Create a List, open the folder then right click in the empty folder space and select 'New'. Then right click on the name and name the List as desired as shown to the right.

3) **Add Calls to Call List** – To add calls to a created Call List, simply drag and drop the call into the created Call List icon within the proper call list folder. This does not change the storage location of the original call, it is a shortcut to the original recording.

4) **Playback of Calls in Call List** – To access calls in a call list, double-click on the list. The calls in the list will then appear in the Main Playback window of the program as a new compilation of calls. When finished with a call in the list, right click on the call and select remove, this will remove the call from your Call List while leaving it in the original storage location. To return to the Folder View, click on the Up Folder icon.



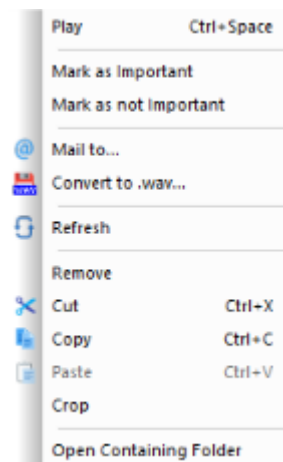
## Emailing Calls

Emailing and exporting calls is a very simple process. To email a recording :

1. Select Recording to Email



2. Click on E-Mail icon on main menu bar, or right click on the recording and select email function from the Right-Click Menu.

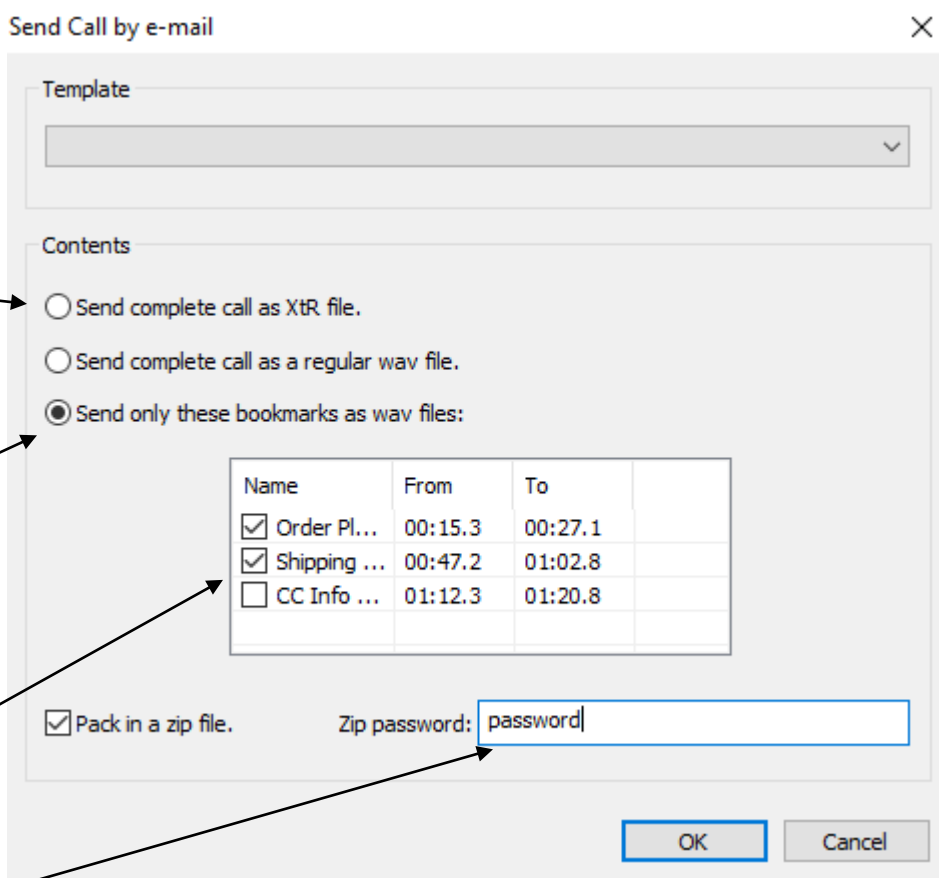


3. A template of the email text is provided or you can customize.

4. What to send? Complete call as an XTR file (recipient will require the XTR Player software)

5. Complete call as a wav file- user can Playback using any media player.

6. Just selected Bookmarks- only sends specific portions of the call.



7. The recording can be zipped and password protected to add security if desired

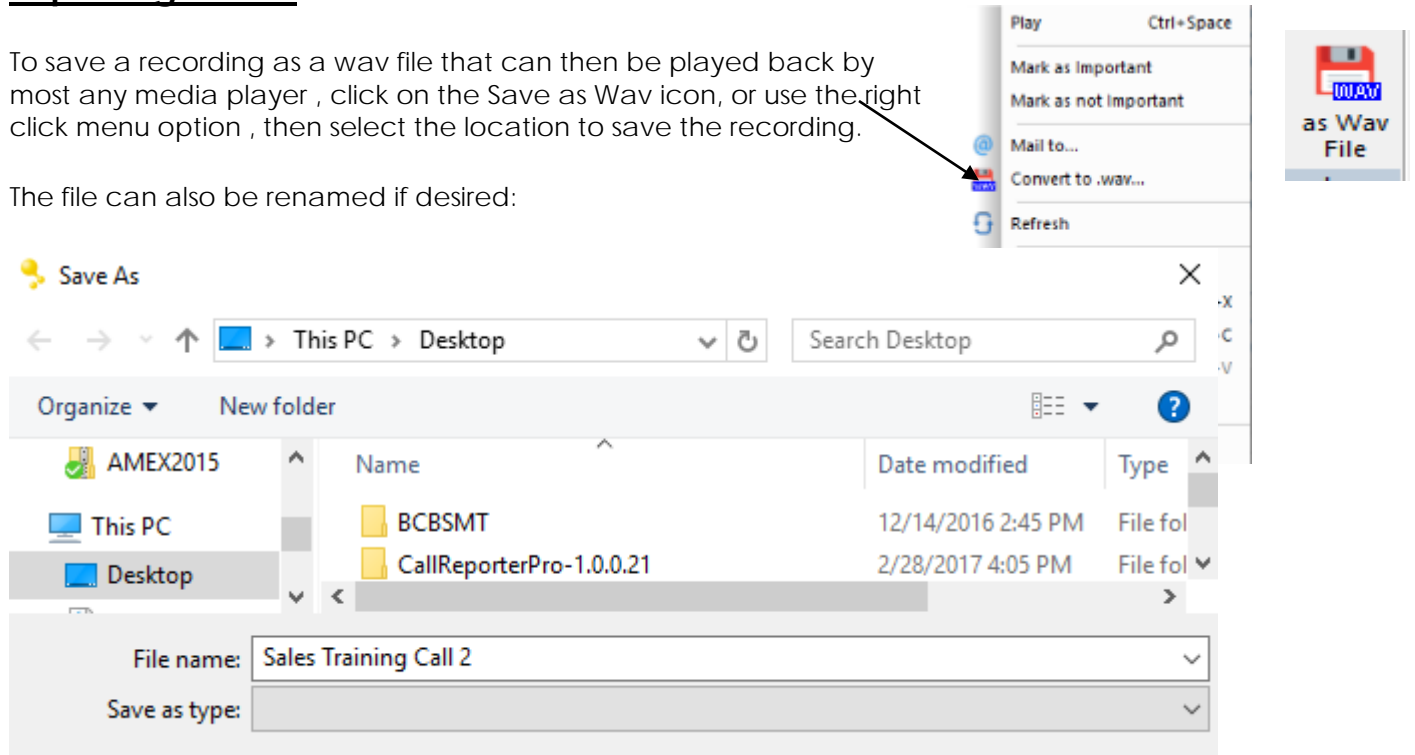
8. The MS Outlook program on the local PC will open and attached as directed to an outbound e-mail message.



## Exporting Calls

To save a recording as a wav file that can then be played back by most any media player, click on the Save as Wav icon, or use the right click menu option, then select the location to save the recording.

The file can also be renamed if desired:



## Marking Calls Important

Calls can be marked as **Important** by selecting the call and then selecting mark as important from the Right-Click Menu. This will highlight the recording in the list as well as prevent the system from ever auto-deleting the call.

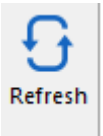
File Modification ...	Important	Bookmarks	Terminal ID	Direction	Caller ID	Call Ti
06/09/17 14:52:18	!		Adam Tremble	→	(555) 555-2480	04/11/
04/06/11 08:47:21	!		Adam Tremble	→	(555) 555-2629	04/12/

## Other Functions

### How to Update Call Information in a Recordings List

When a list of calls for one user or groups is displayed, new calls are **not** automatically updated to the list.

To update and display new calls, use the refresh function on the Main menu Bar.



### Remove a Call from a list

Selected calls can be needed to be removed from a list of compiled calls by right clicking on the file and selecting 'remove'. This removes the call from the list (does not delete the recording).

### How to Multi-Select Calls in Recordings Lists

The following are multi-selection options after the first call is selected:

- CTRL+A key or SHIFT+A key will select all calls.
- SHIFT+Mouse-Click will select all calls between the first selected call and the last selected call.
- CTRL+mouse-click will select/de-select specific calls.

### Crop Calls

Cropping selected calls moves those calls into a new Recording List in the main menu.

1. Select the calls to be moved.
2. Click the Crop option from the right-click menu to remove the selection.

### How to Copy Calls Between Recordings Lists

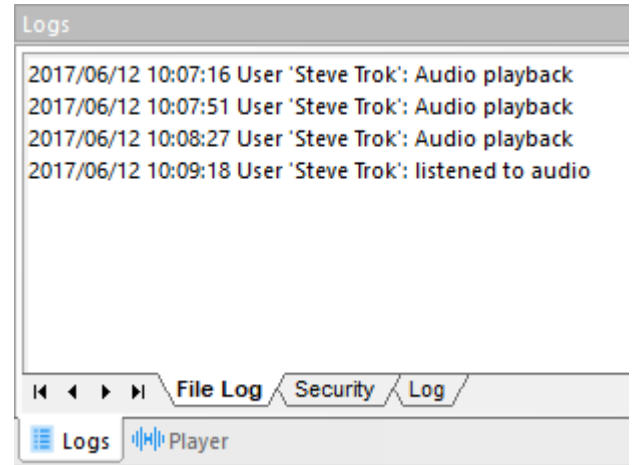
1. Select the calls to copy from a Recordings List.
2. Click the Copy option from right-click menu or CTRL+C from the Keyboard.
3. Create a new Recordings List or bring the target Recordings List to focus.
4. Press CTRL+V or the Paste option from the right-click menu.

## File Logs and Security

### File Log

The File Log is accessed via the Player Panel. It keeps a log of all users that have accessed the recorded call.

1. Select Recording
2. Select Logs Tab in Player window
3. Select File Log



### Security and Log

This keeps track of user logins and changes to the system.

```

2017/06/12 10:07:43.209 : XtR File - Audio playback, user: 'Steve Trok', file: '\\?\C:\Users\Steve Trok\Documents\My Calls\Steve Trok-2017-Jun-09-13.47.14.xtr'
2017/06/12 10:07:51.745 : XtR File - Audio playback, user: 'Steve Trok', file: '\\?\C:\Users\Steve Trok\Documents\My Calls\Steve Trok-2017-Jun-09-15.32.55.xtr'
2017/06/12 10:08:27.629 : XtR File - Audio playback, user: 'Steve Trok', file: '\\?\C:\Users\Steve Trok\Documents\My Calls\Steve Trok-2017-Jun-09-15.32.55.xtr'
2017/06/12 15:30:31.444 : XtR File - Audio playback, user: 'Steve Trok', file: '\\?\C:\Users\Steve Trok\Documents\My Calls\Steve Trok-2017-Jun-09-15.32.55.xtr'
2017/06/12 15:31:23.620 : XtRSecurity - User 'Steve Trok' logged off.
2017/06/12 15:31:32.295 : XtRSecurity - Login as user 'Steve Trok' succeeded.
2017/06/12 15:31:32.299 : Previous log in info. user: 'Steve Trok' logged in on '06/12/17 10:00:55'.

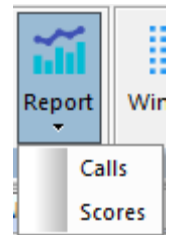
```

## Call Reports

Call Reporter Pro utilizes Crystal Reports in order to access the data about calls, agent activity and scoring. The first release of the Call Reporter Pro has only basic reports included, more reports will be added with future releases.

### How to Generate a Report

1. Compile the list of calls for reporting purposes. The reports will be based on the calls compiled and in the active window. I.e. For a monthly report, compile a call list for the last month for the desired group.
2. Click on the Report Icon in the Main Menu Bar, then select 'Calls'
3. The Main Calls Report will then appear in the active window of the program:



### Calls Report

Calls from: Monday, January 3, 2005 8:05:00AM

To: Thursday, June 30, 2005 2:12:00PM

Generated on: 6/13/2017 at 10:16:30AM

Terminal	Count	Incoming Calls			Outgoing Calls			Total Calls		
		Ring	Avg	Duration	Count	Avg	Duration	Count	Avg	Total
Adam Tremble	86	00:00	00:09	12:56				86	00:09	12:56
Celia Smith	82	00:00	00:09	12:39				82	00:09	12:39
Debbie Pollock	75	00:00	00:08	10:07				75	00:08	10:07
Henry Norris	81	00:00	00:07	09:26				81	00:07	09:26
James Bird	64	00:00	00:05	05:26				64	00:05	05:26
Jane Wayne	71	00:00	00:04	05:03				71	00:04	05:03
Mary Jackson	84	00:00	00:04	05:36				84	00:04	05:36
Michael Fox	89	00:00	00:04	05:56				89	00:04	05:56
Natasha Davis	72	00:00	00:03	04:00				72	00:03	04:00
Olivia Braves	86	00:00	00:03	04:18				86	00:03	04:18
Oscar Sanderson	70	00:00	00:03	03:30				70	00:03	03:30
Pam Rover	71	00:00	00:03	03:33				71	00:03	03:33
Paul Black	76	00:00	00:03	03:48				76	00:03	03:48
Peter White	84	00:00	00:03	04:12				84	00:03	04:12
Robert Love	68	00:00	00:03	03:24				68	00:03	03:24
Ron Fisher	74	00:00	00:03	03:42				74	00:03	03:42
Sally Skillet	80	00:00	00:03	04:00				80	00:03	04:00
Susan daily	87	00:00	00:03	04:21				87	00:03	04:21
Tracy Walker	83	00:00	00:03	04:09				83	00:03	04:09
Victor Graves	73	00:00	00:03	03:39				73	00:03	03:39
<b>All terminals</b>	<b>1,556</b>	<b>00:00</b>	<b>00:04</b>	<b>1:53:45</b>				<b>1,556</b>	<b>00:04</b>	<b>1:53:45</b>

4. **Drill Down** - By Double Clicking on an agent name a detailed report of every call for that agent is displayed :

**Michael Fox** Main Report **Michael Fox**

### Calls Report

Calls from: Monday, January 3, 2005 8:05:00AM  
 To: Thursday, June 30, 2005 2:12:00PM  
 Generated on: 6/13/2017 at 10:16:30AM

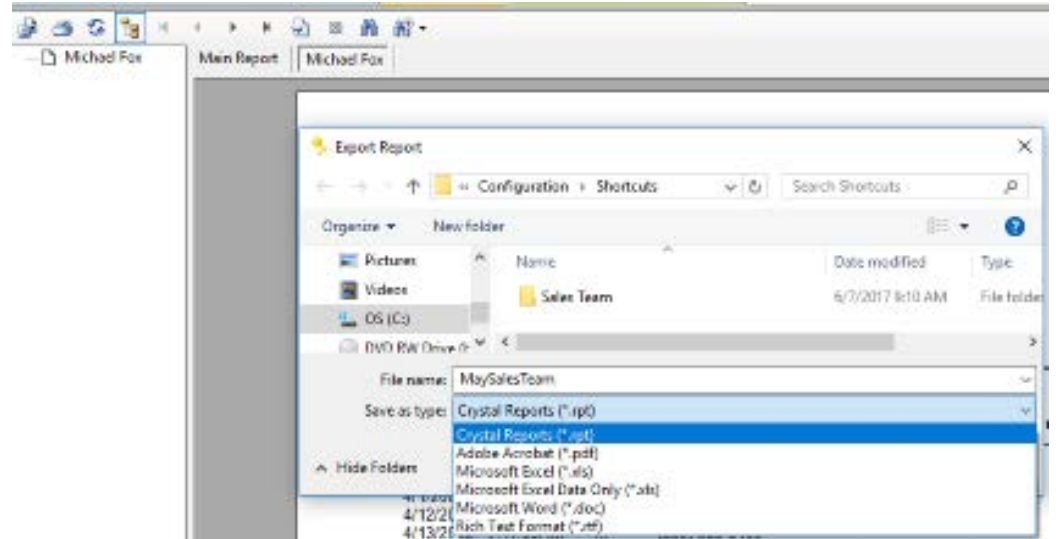
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**Terminal Michael Fox**

Date / Time	Dir	Caller ID	DID	Duration
4/11/2005 11:10:00AM	In	(555) 555-7582		00:04
4/11/2005 3:14:00PM	In	(555) 555-6139		00:04
4/1/2005 4:22:00PM	In	(555) 555-4150		00:04
4/12/2005 9:11:00AM	In	(555) 555-3238		00:04
4/13/2005 7:11:00AM	In	(555) 555-3108		00:04
4/13/2005 10:01:00AM	In	(555) 555-1571		00:04
4/22/2005 2:02:00PM	In	(555) 555-3472		00:04
4/27/2005 11:02:00AM	In	(555) 555-6252		00:04
4/4/2005 7:14:00AM	In	(555) 555-5907		00:04
4/4/2005 9:23:00AM	In	(555) 555-5364		00:04
4/4/2005 12:14:00PM	In	(555) 555-4668		00:04
4/5/2005 12:51:00PM	In	(555) 555-4396		00:04
4/6/2005 12:05:00PM	In	(555) 555-2952		00:04
4/6/2005 3:41:00PM	In	(555) 555-2278		00:04
4/8/2005 11:51:00AM	In	(555) 555-5107		00:04
2/10/2005 2:14:00PM	In	(555) 555-6839		00:04
2/10/2005 2:53:00PM	In	(555) 555-1529		00:04
2/11/2005 1:54:00PM	In	(555) 555-1811		00:04
2/1/2005 12:34:00PM	In	(555) 555-7062		00:04
2/14/2005 8:04:00AM	In	(555) 555-2120		00:04
2/18/2005 3:14:00PM	In	(555) 555-6733		00:04
2/22/2005 4:54:00PM	In	(555) 555-1357		00:04
2/23/2005 3:40:00PM	In	(555) 555-4161		00:04
2/25/2005 11:35:00AM	In	(555) 555-1919		00:04
2/1/2005 10:30:00AM	In	(555) 555-5108		00:04

## Print, Export Reports

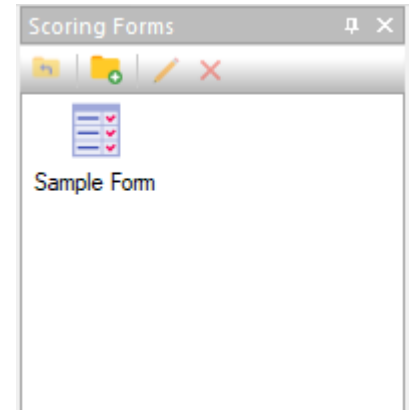
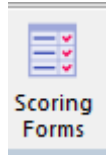
Reports can be printed or exported into a variety of formats as shown on the right.



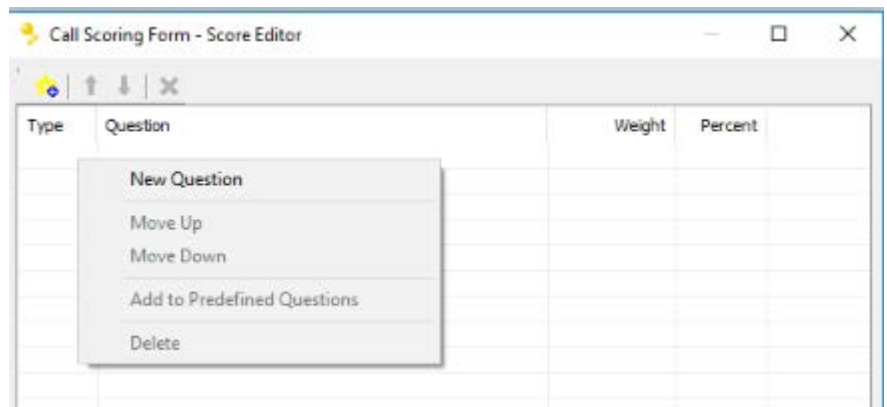
## Call Scoring

Call Scoring is used as an evaluation and training tool. Scoring forms can be customized for each company or department and then used to grade individual calls. Reports can then be utilized to compare employees as well as determine strengths and weaknesses of individuals.

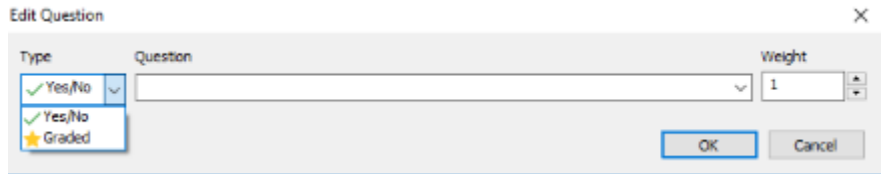
### 1) Creating Call Score Forms



- a. Click on the Scoring Forms icon on the main menu bar, this will launch the Scoring Forms Panel
- b. As with the Queries and Call Lists, Scoring Forms can be placed into group folders or left to float in the main scoring form panel, a sample form is provided in default.
- c. Right Click in the panel and select 'New' this will launch the Call Scoring Form window.
- d. Right Click and select 'New Question'

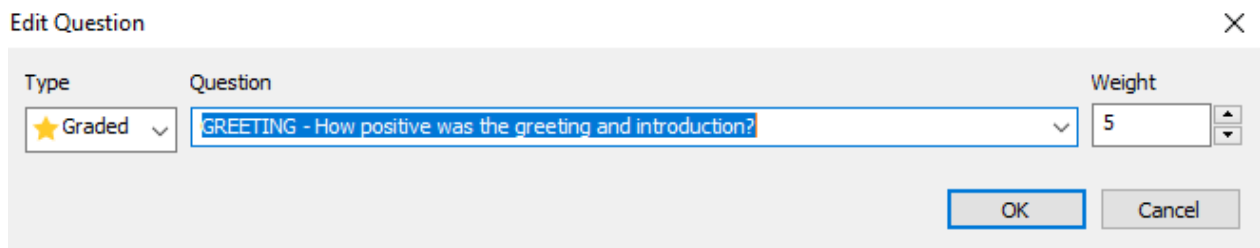


- e. This launches the Edit Question Window

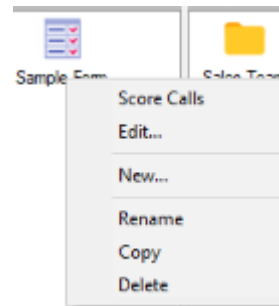


- f. Select whether a Yes/No Question or a graded questions

- g. Write a question or select from the list of predefined questions available from the drop down menu , repeat until your form is completed. Then Click Save and then Close. A new form will then appear in the Scoring Forms panel or group folder you created.

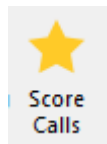


- h. Right Click on new form and select Rename



- i. Repeat process to create more forms.





## 2) Scoring Calls

- a) Select the recording to score.
- b) Select the Score Calls, this will launch the Score calls window, the last score form used will be shown.
- c) To select a different form press the small form icon
- d) While listening to the call, score each question, if any question is deemed to be not applicable to the call, do not score that question and the other questions weight will adjust accordingly.
- e) Once completed, select Save, this will store the score with the recording and also mark the question as important. In addition it will be highlighted in the Score column, mouse-over the Star and it will display the score and form used.

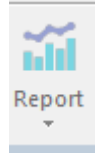
The screenshot shows the 'Score Calls' window with a table of questions. The 'Score' column contains stars, and the 'Form' column shows the form used for each question. The 'Save/Next' button is highlighted.

Question	Score	Form	Weight	Percent
1 GREETING - How positive was the greeting and	★★★★★		-	
2 KNOWLEDGE - What was the ability to answer and satisfy	★★★★★		-	
3 UNDERSTANDIN - How well did we demonstrate an understanding	★★★★★		-	
4 OFFER - Was an evaluation version	✓ ✗		-	
5 WON/LOST - Did the sale close?	✓ ✗		-	

Incomplete. Score: -/- (-%)

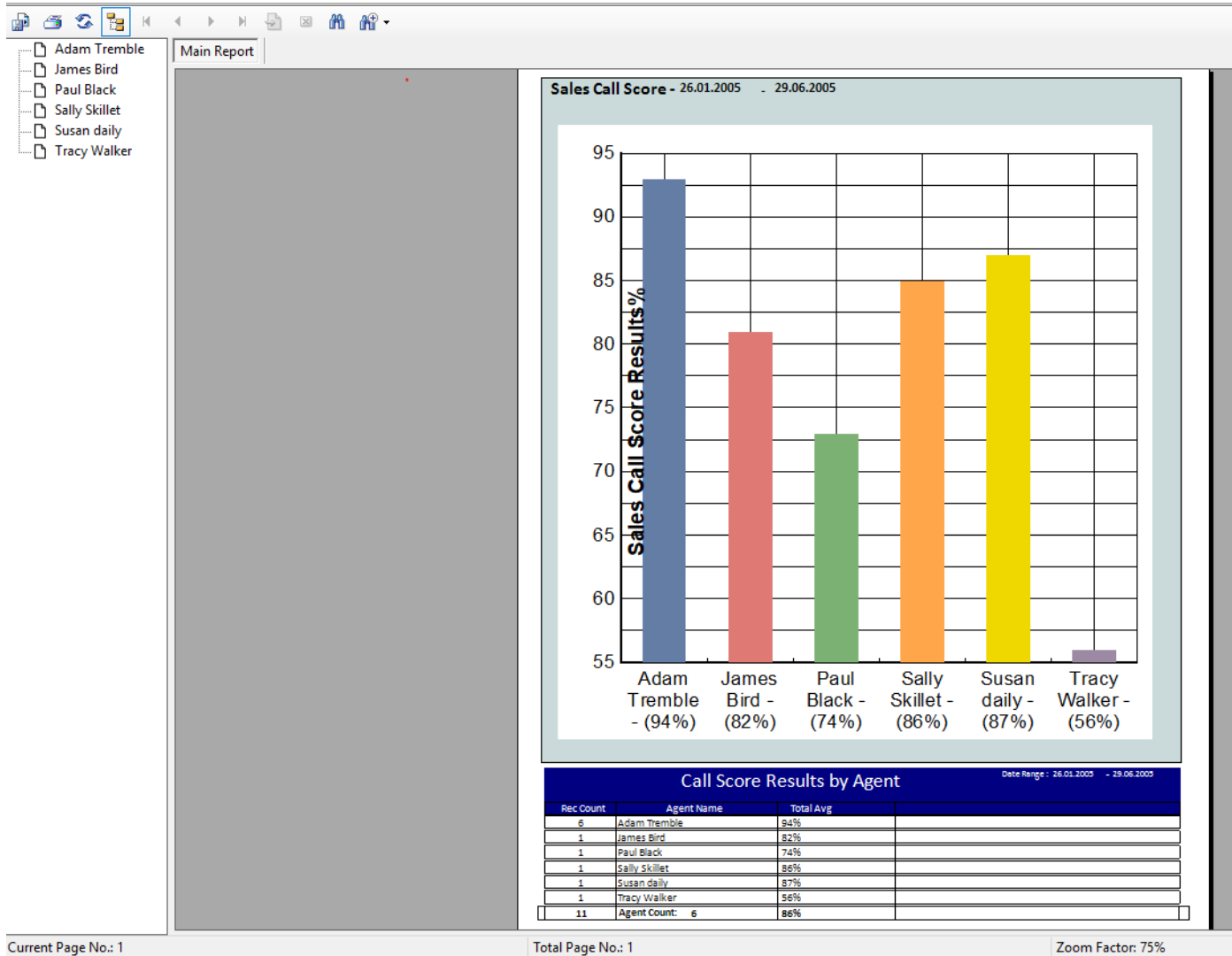
Buttons: Previous, Skip, Save/Next

Score: ★★★★★  
Form: Sample Form. Score: 87.4%



### 3) Call Score Reports

- a) Select the group of calls to report on and bring to the active window.
- b) Click on the Report icon in the Main Menu.
- c) Select the desired call score report, in this case selected **Call Score by Agent**



d) The other option currently is a **Call Score Report**. This will provide a print out of each call scored and the results for each agent. This can then be printed or exported.

Main Report

## Operator Evaluation Report

Points:	56.00 / 76.00
Score:	73.7 %

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**Extension Paul Black**
**Average: 84.6 %**

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**Extension Sally Skillet**

**Summary for call from (555) 555-2779**

Date / Time : Wednesday, June 29, 2005 11:35:00AM  
 Duration: 00:03  
 Comments:

---

**Evaluation Form: Sample Form**

Evaluated by:  
Date:

Question			
1 GREETING - How positive was the greeting and introduction?	★★★★☆	0.50	1.00
2 RAPPORT - How well did we build a rapport with the prospect?	★★★★☆	1.00	2.00
3 MOTIVATION – What was the ability to motivate prospect and advance sales process?	★★★★★	11.00	11.00
4 UNDERSTANDING - How well did we demonstrate an understanding of the prospect needs?	★★★★☆	3.75	5.00
5 KNOWLEDGE – What was the ability to answer and satisfy questions?	★★★★☆	7.50	10.00
6 CONTACT INFO - Was contact information gathered?	Yes	2.00	2.00
7 OFFER - Was an evaluation version offered?	Yes	6.00	6.00
8 WON/LOST – Did the sale close?	n/a	-	-
		Points:	31.75 / 37.00
		Score:	85.8 %

Note: Reports shown are those on initial release, more will be added with subsequent releases. It is also possible to create custom reports, contact Intelligent Recording for more information.

## Get Expert Help.

We invite you to visit our web site for support: <http://www.usbcallrecord.com>

- Technical support and assistance when setting up your Call Reporter Pro.
- The latest software and firmware downloads for your Call Reporter Pro including feature enhancements and bug fixes
- Advice about other Call Recording options for your company.

We greatly appreciate your business and thank you for choosing the Call Reporter Pro by Intelligent Recording.