exotel
DOCS

Conversational Intelligence

1. CQA

1.1. Introduction & Product Overview

Target Audience:

All Users, Evaluators, New Customers

Description:

This document serves as the landing page for the CQA product, explaining what it is, who it is for, and the core concepts driving it.

1. Introduction

1.1. Purpose

This user guide serves as the primary reference for all users of the Conversation Quality Analysis (CQA) platform. It provides detailed, step-by-step instructions for utilizing the platform's features to analyze, score, and improve customer interactions.

1.2. Intended Audience

This document is intended for all personnel involved in the quality assurance lifecycle, including:

- **System Administrators:** Responsible for platform setup, user management and configurations.

- **Agents:** Whose conversations are being analyzed and who participate in the dispute process.
- **Supervisors & Quality Analysts:** Responsible for reviewing analyses, managing quality profiles, and resolving disputes.

2. Product Overview

CQA is an intelligent, automated quality assurance platform designed to streamline the evaluation of contact center interactions. It functions as a centralized console that ingests call recordings, analyzes them against defined Quality Profile, and provides actionable insights into agent performance and operational trends. The platform is designed to be **agnostic**, meaning it can potentially integrate with any contact center platform.

2.1. How It Works

In CQA, analysis happens automatically as soon as a recording enters the system. The workflow is driven by three core components:

1. **Input (Metadata):** When a recording arrives, it carries "metadata" (e.g., Campaign Name, Agent ID, Talk Time, Region).
2. **Logic (Assignment Rules):** The system checks this metadata against a set of pre-defined rules. For example, a rule might state: *"If **Campaign** is 'Sales' and **Duration** is > 2 minutes, use the 'Sales Quality Profile'"* .
3. **Execution (Quality Profile):** The system instantly applies the selected Quality Profile to the recording, generates a score, and logs the result in the Analysis List.

2.2. Key Concepts & Definitions

To operate CQA effectively, users must understand the following core building blocks

2.2.1. Metadata: The Engine of Automation

Metadata is the structured information associated with every interaction. It is the most critical component of the CQA platform because it drives all automation and visibility.

- **Routing:** It determines which Quality Profile is used to score a call.
- **Filtering:** It allows users to slice and dice data on the Dashboard (e.g., "Show me scores for the *North Region* only").

- **Security:** It controls User Access. For instance, a Supervisor tagged with "Region A" metadata will only see data relevant to that region .

2.2.2. Quality Profile (QP): The Scoring Rubric

A Quality Profile is a structured evaluation form used to score an agent. It is organized hierarchically to provide granular reporting:

- **Category:** High-level grouping (e.g., "Soft Skills," "Compliance").
- **Sub-Category:** Specific focus area (e.g., "Greeting," "Closing").
- **KPI (Key Performance Indicator):** The specific question used to evaluate the agent (e.g., "Did the agent mention the brand name?").
    - **KPI Types:** The system supports **Yes/No** (Binary), **Selection** (Multiple Choice), and **Rating** (1-5 Scale), **Text** (Data Extraction) inputs .
    - **Criticality:** KPIs can be marked as "Critical." If a Critical KPI fails, it can automatically zero out the score for the entire Category, sub-category or the entire quality profile (based on the criticality level), enforcing strict compliance standards.
- **SOP Based Analysis:** To ensure AI accuracy without writing excessively long KPI descriptions, CQA allows you to attach Standard Operating Procedures (SOPs) directly to your Quality Profiles. The AI automatically extracts context from these documents to evaluate the conversation.

2.2.3. Assignment Rules: The Automation Layer

Assignment Rules replace the need for manual scheduling. An Assignment Rule is a conditional logic statement that tells the system *when* to use a specific Quality Profile.

- **Dynamic Logic:** You can create rules based on any available metadata field.
    - *Example:* "Apply the 'Urgent Care Profile' ONLY if the Queue Name is 'Emergency' AND Talk Time is less than 30 seconds" .
- **Continuous Operation:** Once a rule is active, it runs continuously in the background, analyzing every matching call upon arrival.

2.2.4. Analysis & Interaction Review

An "Analysis" refers to a single recording that has been processed by a Quality Profile.

- **The Analysis List:** A central log of all processed interactions, searchable and filterable by score, date, agent, or metadata.
- **Interaction View:** A detailed view where Supervisors can listen to the call, read the transcript, viewing specific AI reasoning for every score, and handle disputes raised by agents.
- **Native Language Support**: CQA can process audio interactions in both English and the speaker's detected native language (e.g., Arabic, Hindi), removing the English-only barrier for regional markets. The Interaction Details page provides a **language toggle** to switch between English and the native language transcripts and summaries. For Right-to-Left languages like Arabic, the text automatically applies RTL formatting. This feature is available only on higher-tier plans.

2.2.5. Test Evaluation

The **Test Evaluation** module enables users to run ad-hoc analyses on specific batches of recordings, which is ideal for testing new Quality Profiles or processing offline files that were not analyzed automatically.

- **Setup:** Users create a test by giving it a name, selecting a target **Quality Profile**, and uploading an Excel file containing the **Recording URLs** and any relevant **Metadata**, or direct audio/text files.
- **Status Tracking:** The system indicates the batch status, such as **Completed** or **Partial Success** (if some audio links were invalid), allowing users to quickly identify and troubleshoot errors.
- **Export:** Users can export the detailed results of any test evaluation directly to their email for offline review.

2.2.6. User Management

The **User Management** module provides a centralized view of all individuals authorized to access the CQA platform. Administrators use this section to monitor account details and verify role assignments.

- **View User Directory:** Navigate to the **Users** icon in the sidebar to see a comprehensive list of all registered accounts. The table provides key identity details including **Name**, **Email Id**, and **Username**.
- **Monitor Roles:** Quickly identify the permission level of each user:

    - **Admin:** Has full access to system configuration (Metadata, Quality Profiles, Assignment Rules).
    - **Supervisor:** Focuses on operational tasks like reviewing the Analysis List and resolving disputes.
- **Check Status:** Verify if an account is currently **Active** or Inactive directly from the status column.
- **Self-Serve Invitations:** Administrators can instantly invite new team members to the workspace directly from the dashboard without contacting support.

Note on Access Control: While the current view lists roles, granular data visibility (e.g., restricting a Supervisor to a specific Region) is configured via the **Metadata** settings in conjunction with these user profiles.

2.3. User Roles

- **Admin:** Configures Metadata, builds Quality Profiles, and sets Assignment Rules.
- **Supervisor:** Reviews the Analysis List, monitors Dashboard trends, and resolves Agent disputes.
- **Agent:** Logs in to view their own performance scores and can raise disputes on specific KPI results if they disagree with the AI's assessment .

Data Privacy & Customization

- **Tenant-Specific Permissions & Customization:** User access in CQA is evaluated and strictly isolated at the **tenant (workspace) level**. This ensures that users only have access to the exact data they need for the specific account they are working on.
    - **Need Custom Permissions?** While CQA provides standard default access rules for Agents and Supervisors, these roles are highly flexible. If your organization requires a custom permission matrix for a specific workspace (e.g., granting a specific type of Supervisor restricted access), **reach out to your Customer Support Manager**. Our backend team can tailor and configure custom role permissions specifically for your tenant.

3. Getting Started

Target Audience:

All Users

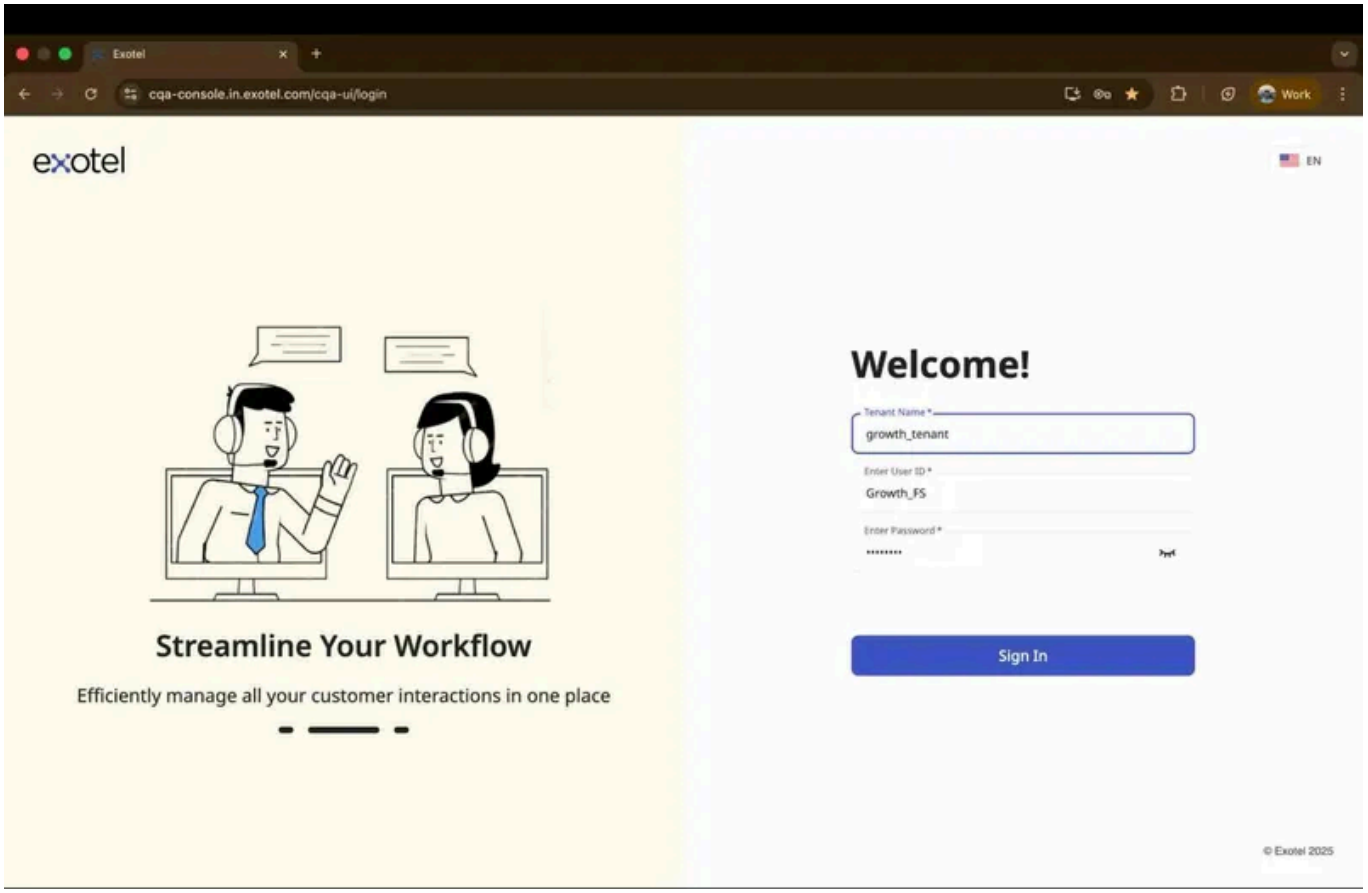
Description:

A quick-start guide focused strictly on accessing the platform and understanding the main dashboard and menus.

3.1. Accessing the Platform

3.1.1 Existing users

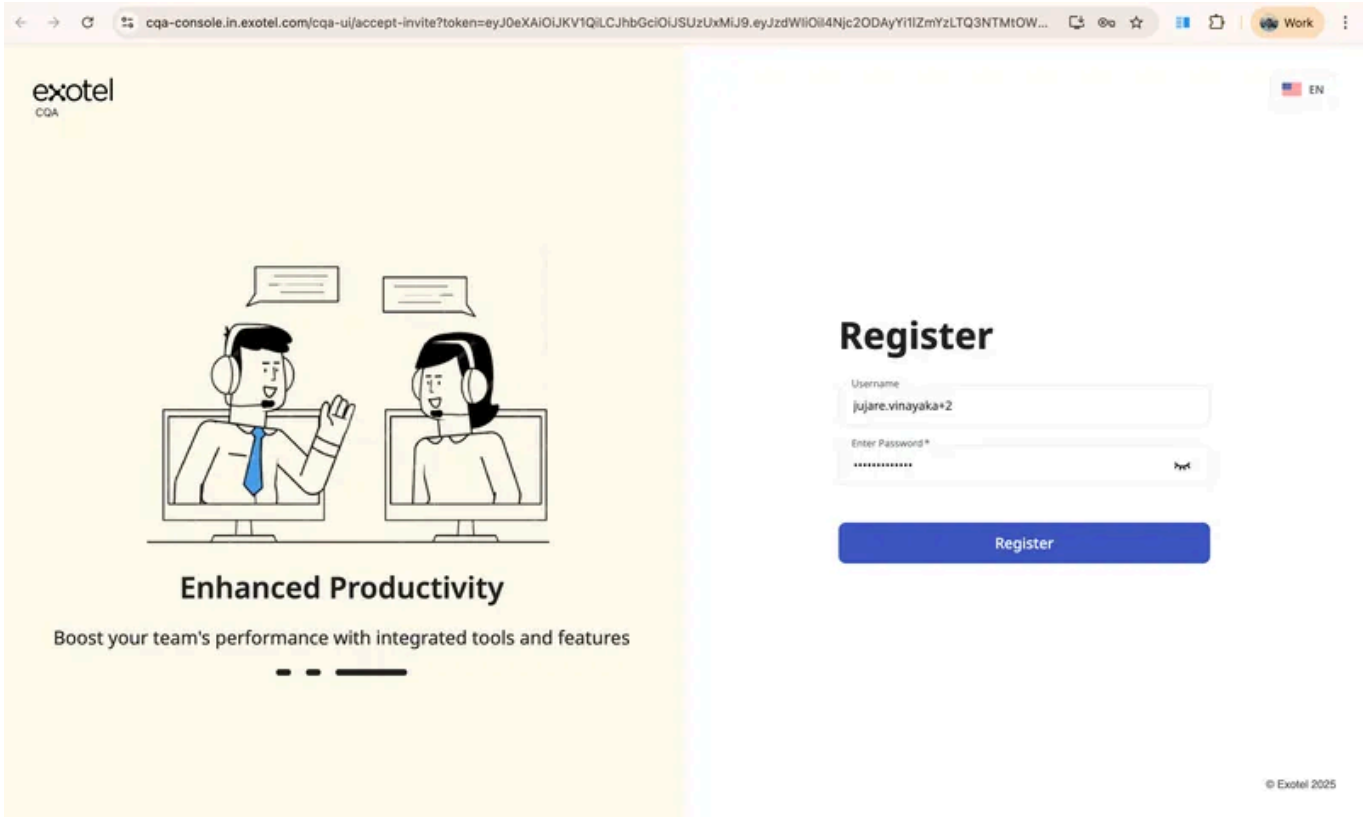
To access the CQA console, you will need your organization's unique Tenant ID and user credentials.



1. **Navigate to the URL:** Open your browser and go to the CQA Console login page (e.g., **cqa-console.in.exotel.com**).
2. **Enter Tenant ID:** Enter your **Tenant Name/ID** to identify your organization.
3. **Enter Credentials:** Input your username and password.
4. **Log In:** Click the button to access the platform.

3.1.2 First-Time Login (Invited Users)

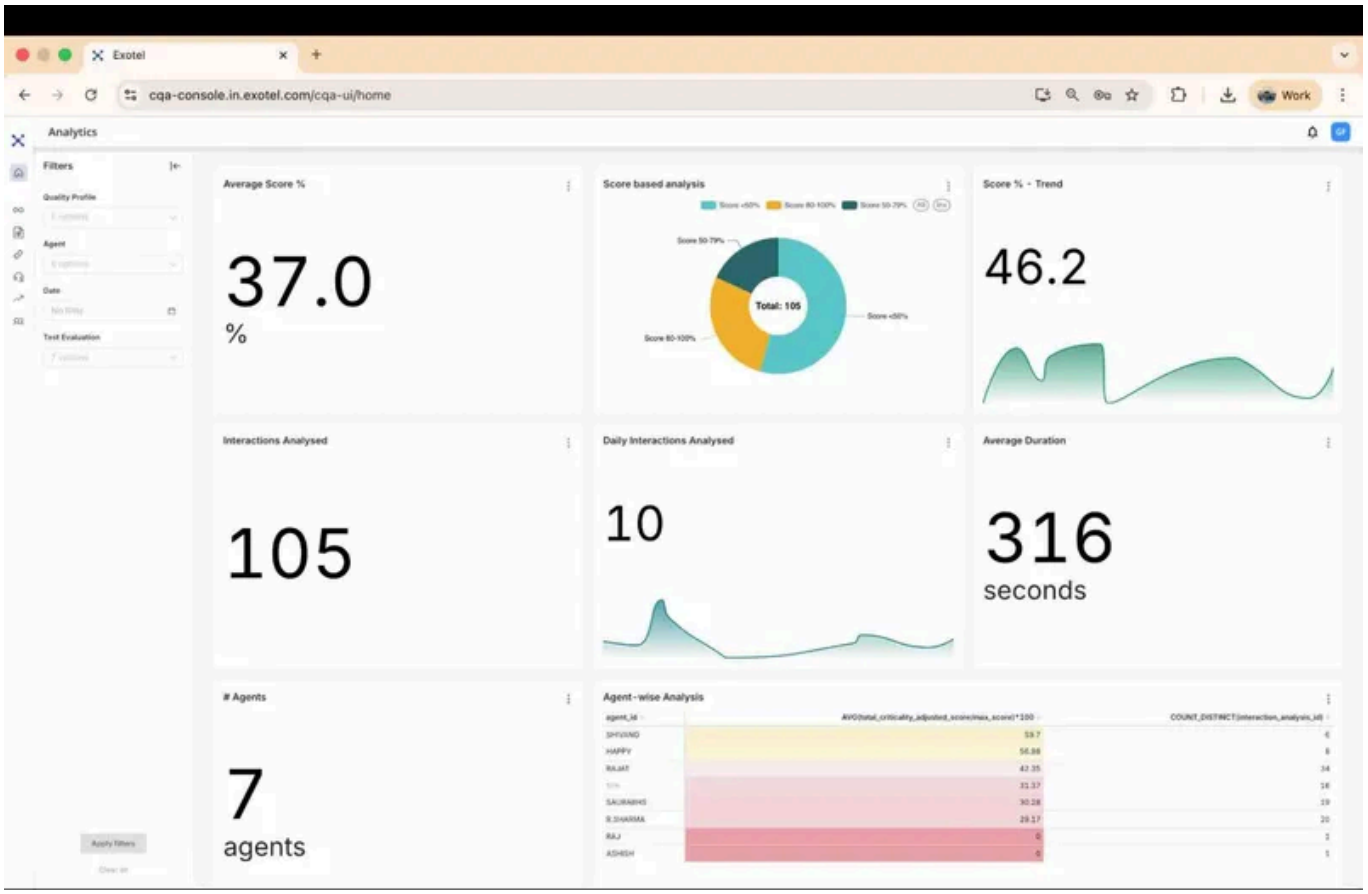
If your Administrator has invited you to join the CQA platform, you must complete your registration via email before accessing the console.



- **Welcome Email:** Look for an email titled "Welcome to CQA!" in your inbox.
- **Accept Invitation:** Click the **Accept Invitation** button within the email. *(Note: For security purposes, this link is strictly valid for 72 hours).*
- **Register Credentials:** You will be redirected to a registration page. Your Username will be pre-filled. Enter and confirm your secure password, then click **Register**.
- **Log In:** Return to the main login page, enter your Tenant ID, Username, and newly created password to sign in.

3.2. The Home Page: Analytics Dashboard

Upon successful login, you are immediately directed to the **Analytics Dashboard**. This is the default home page for all users.



***Note**: The dashboard by default shows the analysis for a specific Quality Profile. User can however de-select the Quality Profile to see the analysis across all the Quality Profiles.*

- **Central Overview:** The main area displays widgets showing high-level metrics like Average Score, Interactions Analyzed, and Trends.
- **Navigation Sidebar:** Located on the left, this bar provides access to all core modules:
  - **Home:** Returns you to the Dashboard.
  - **Metadata:** Configure system data fields.
  - **Quality Profiles:** Create and manage Quality Profiles.
  - **Assignment Rules:** Automate analysis logic.
  - **Analysis List:** View logs of processed calls.
  - **Test Evaluation:** Run ad-hoc tests on batches of recordings.
- **Filter Panel:** On the dashboard, a panel on the left allows you to filter the visualized data by **Quality Profile**, **Agent**, **Date**, or **Test Evaluation**.

Data Privacy & Customization

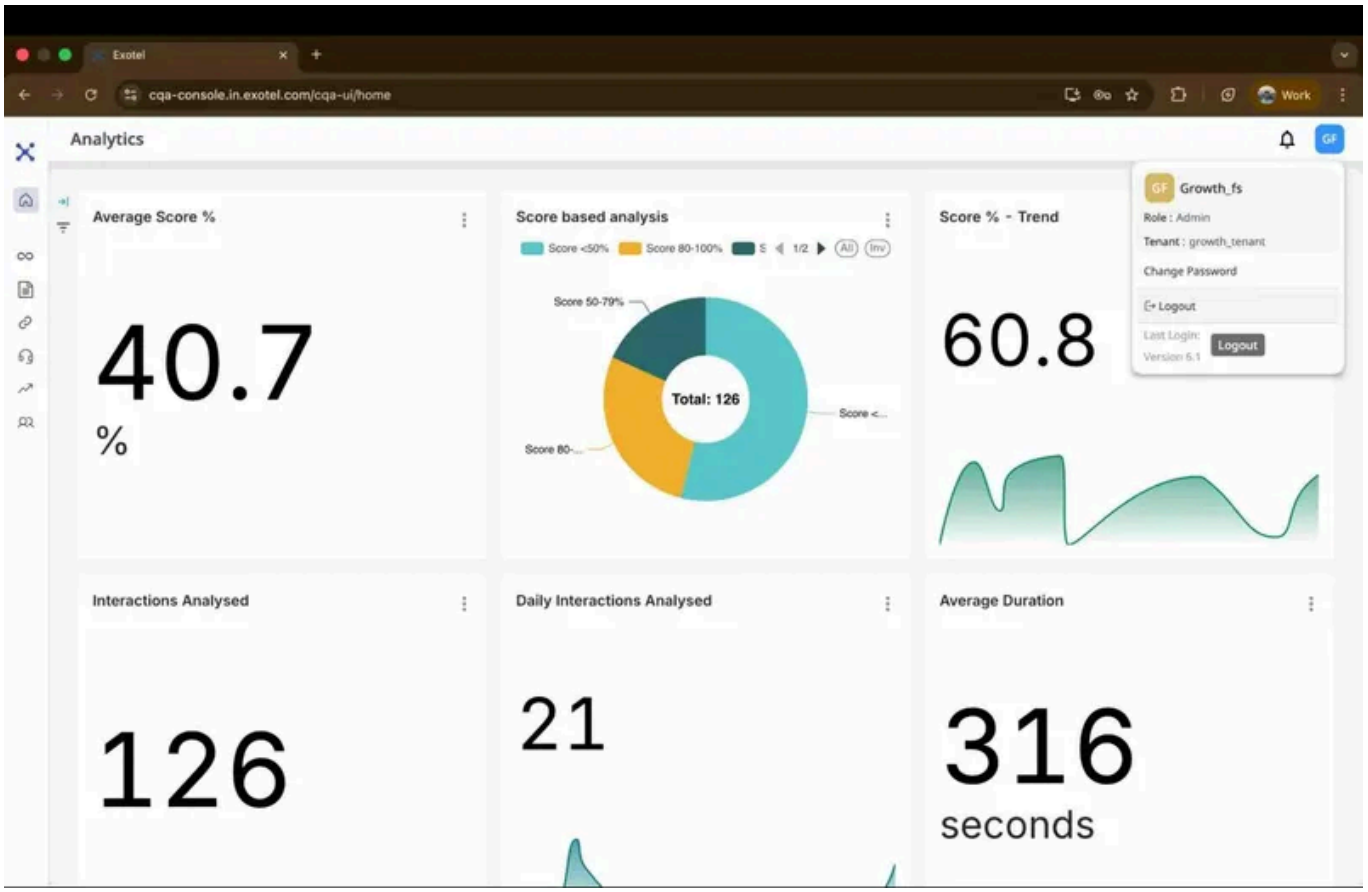
Tenant-Specific Analytics & Custom Dashboards: The CQA analytics engine (powered by Superset) utilizes a strictly isolated, tenant-specific architecture. This means your data visualizations are walled off and secure.

- **Need Custom Reporting?** Because dashboards are scoped to individual tenants, they can be deeply customized. If the standard CQA dashboards do not capture your unique operational metrics, **contact CQA Support**. Our team can build and configure customized reporting views tailored entirely to your specific workspace's needs.

3.3. User Profile & Logout

In the top right corner, you will find your user profile menu. Use this to:

- View your account details.
- **Log Out:** Securely exit the session.



1.3. Administration & Configuration

Target Audience:

System Administrators, QA Leads

Description:

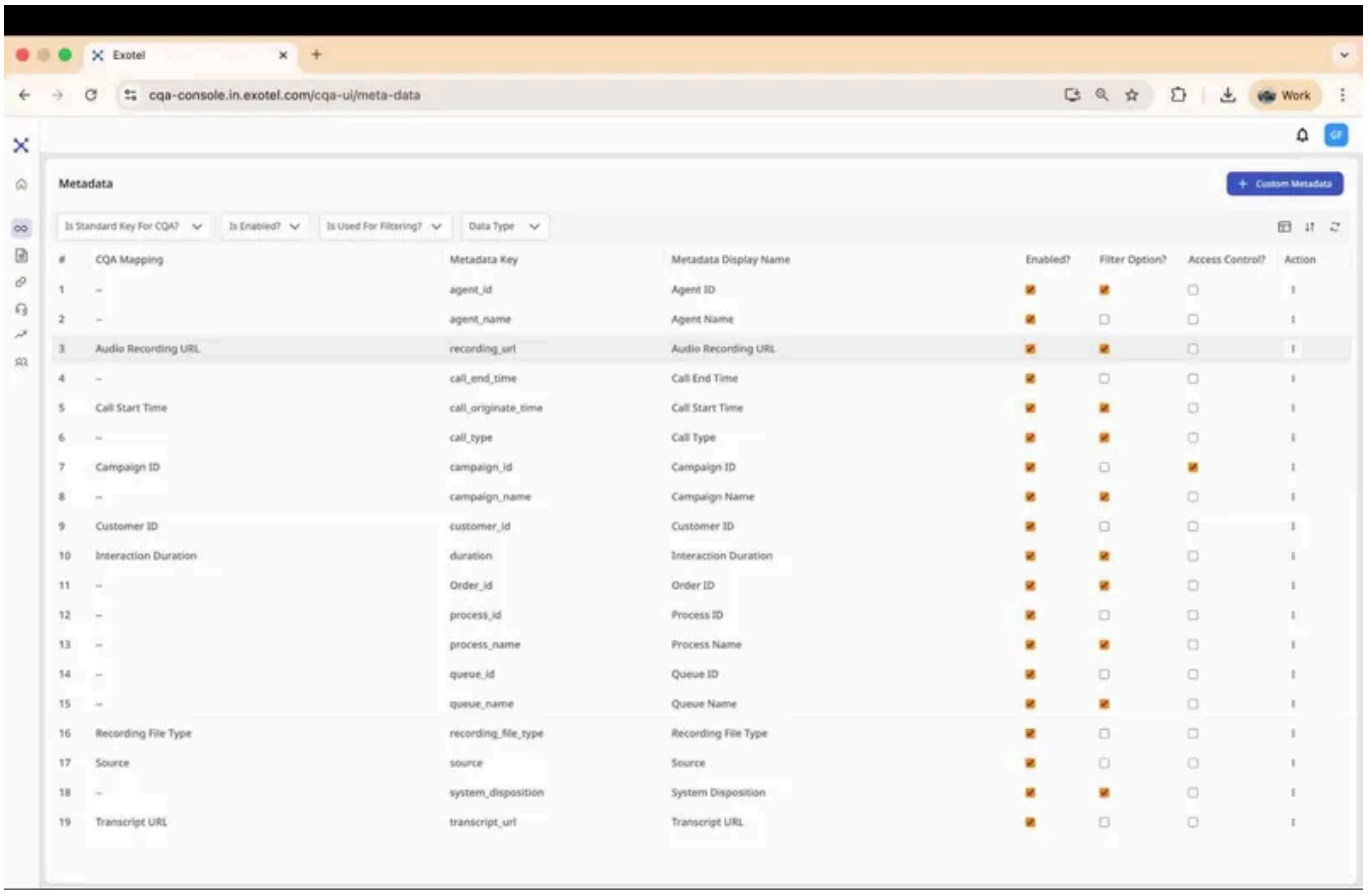
The core setup guide. This page holds all the foundational tasks required to make the CQA platform operational before daily QA work begins.

4. Administration & Configuration

This section is designed for Administrators and QA Leads. It covers the foundational setup required to make the CQA platform operational: defining your data structure (Metadata), creating scoring rubrics (Quality Profiles), and automating the workflow (Assignment Rules).

4.1. Metadata Management

Goal: Define the "vocabulary" the system uses to understand your calls. Metadata consists of the tags attached to a recording (e.g., *Agent ID, Campaign Name, Talk Time*) which drive filtering, reporting, and automation.



4.1.1. Accessing Metadata

Navigate to Metadata in the sidebar. You will see a list of all data keys currently ingested by the system.

4.1.2. Configuring Fields

Admins can customize how each metadata field behaves using the following options:

- **Enable/Disable:** Toggle the **"Enabled?"** checkbox.
    - *Effect:* Enabled fields are visible throughout the platform. Disabled fields are hidden entirely from dashboards and reports .
- **Set as Filter:** Check the **"Filter Option?"** box.
    - *Effect:* This field will now appear as a selectable dropdown in the Assignment Rules and Analysis List, allowing users to slice data by this attribute (e.g., "Show me calls from *North Region*") .
- **Access Control:** Check the **"Access Control?"** box.
    - *Effect:* This restricts data visibility based on user roles. For example, if "Region" is set for access control, a supervisor assigned to "Region A" will not see data for "Region B" .

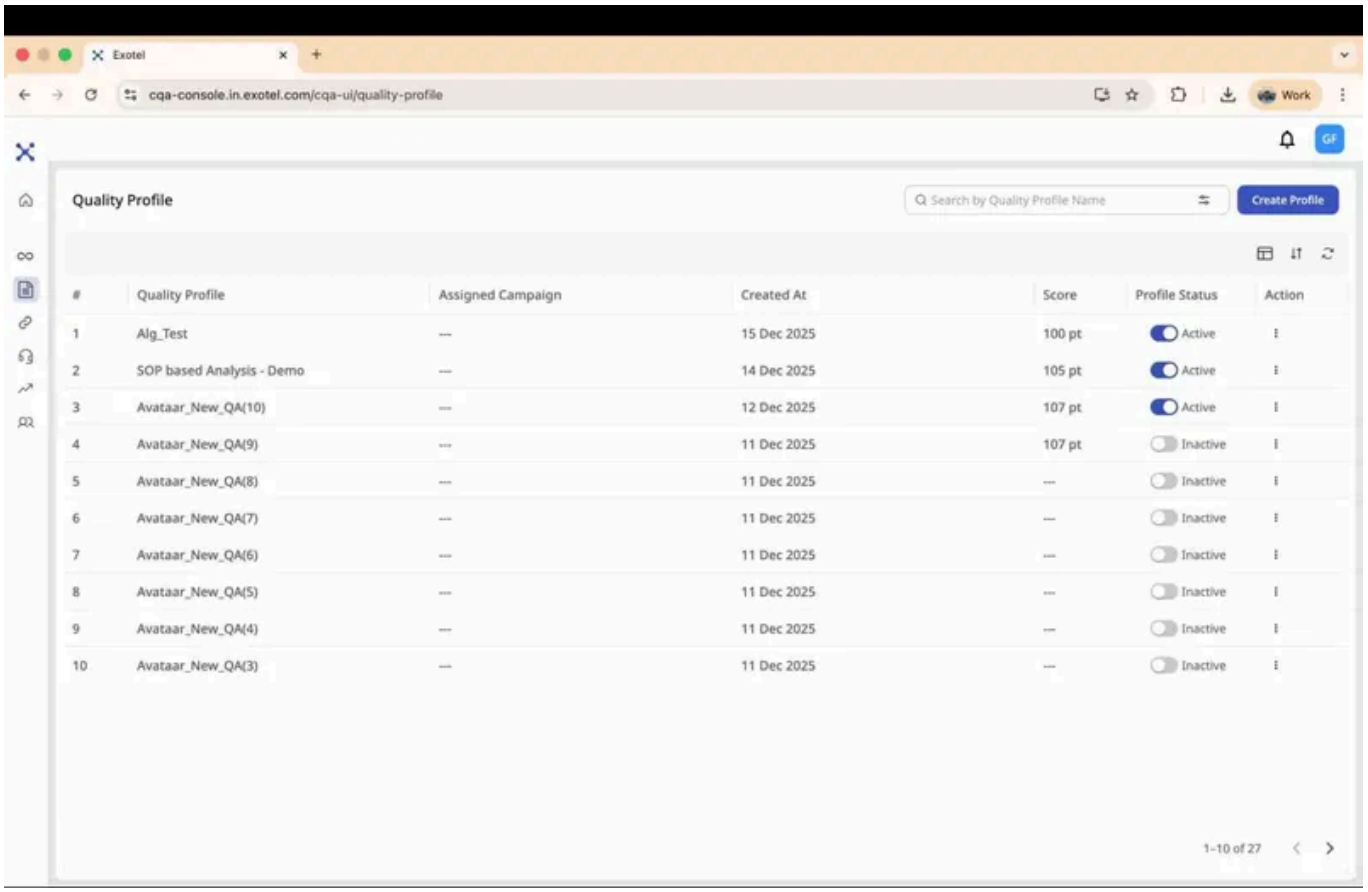
4.1.3. CQA Mapping (Renaming Fields)

Sometimes, the technical name of a field (e.g., program_id) is not intuitive for business users.

- **Action:** Click the **Edit** icon next to a field.
- **Display Name:** Enter a user-friendly name (e.g., "Campaign").
- **Result:** Users will see "Campaign" in reports and filters, while the system continues to read program_id in the background.

4.2. Building Quality Profiles (Scorecards)

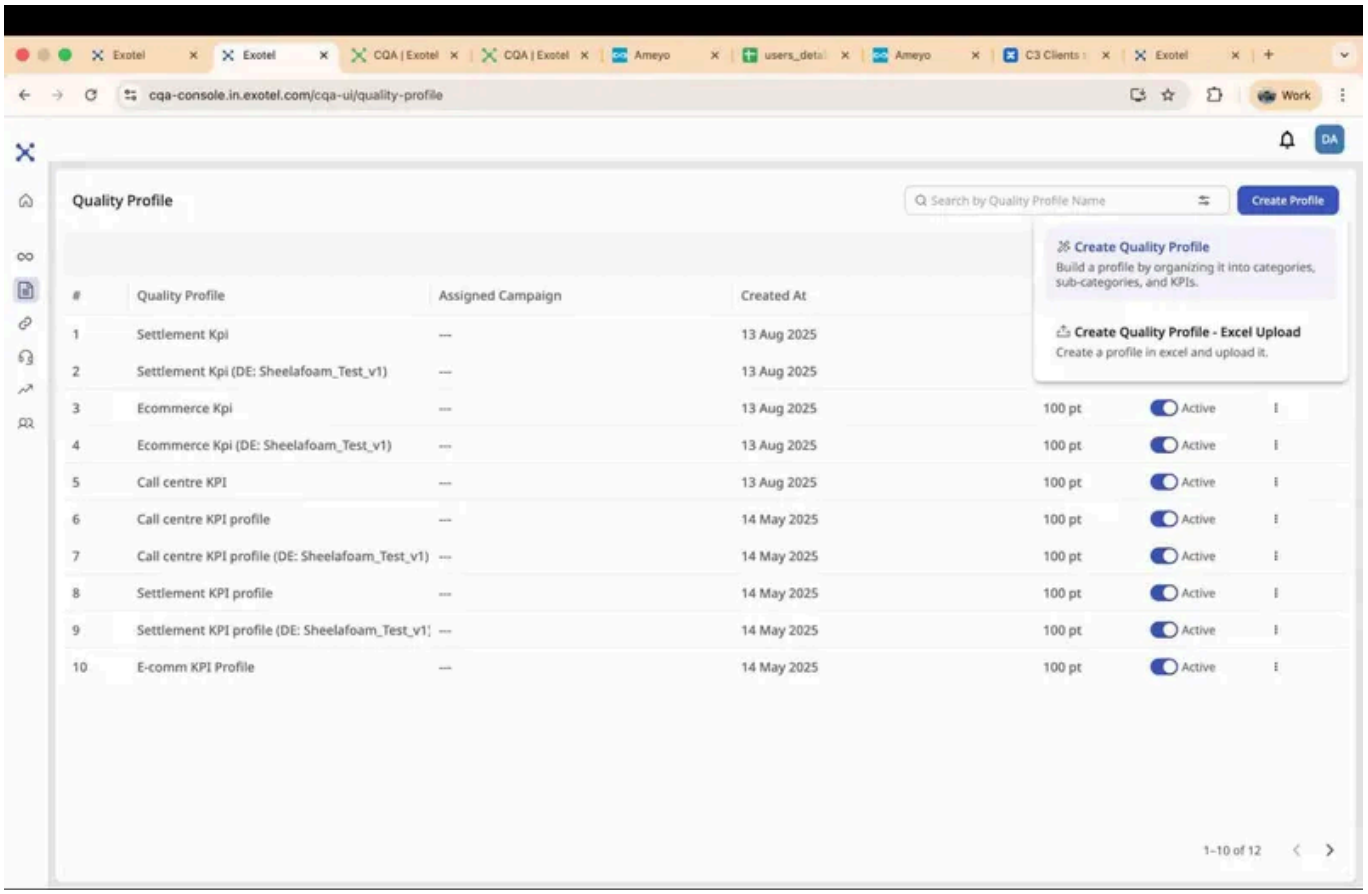
Goal: Create the structured rubric used to evaluate agent performance. A Quality Profile represents a specific scorecard (e.g., "Sales Audit" or "Customer Service Review").



There are two ways to build a profile: **Manually** (good for small edits or simple profiles) or via **Excel Upload** (recommended for bulk creation).

4.2.1. Method A: Manual Creation

Use this method to build a profile from scratch directly in the UI.



1. Navigate to **Quality Profiles** and click **Create Profile**, and click **Create Quality Profile**.
2. **Profile Details:** Enter a Name (e.g., "Inbound Support") and a Description.
3. **Upload Reference Document**: Attach documents (e.g., SOP documents) to be referred by the product while answering KPIs.
4. **Create Structure (Categories):**
    - Click **Add Category** to create a high-level section (e.g., "Opening & Closing").
    - Inside the category, click **Add Sub-category** to create a focused group (e.g., "Greeting").
5. **Add KPIs (Questions):**
    - Inside a sub-category, click **Add KPI**.
    - **KPI Title:** Enter a short name (e.g., "Warm Welcome") that will appear in reports.
    - **KPI Input Type:** Select one of the following:
        - **Yes/No:** A binary choice (e.g., Did they verify the address?). You can assign points for 'Yes' (e.g., 5) and 'No' (e.g., 0).
        - **Selection:** A multiple-choice question. Define scenarios (e.g., "Option A: Mentioned both tax and amount," "Option B: Mentioned only amount"). The AI selects the best match .

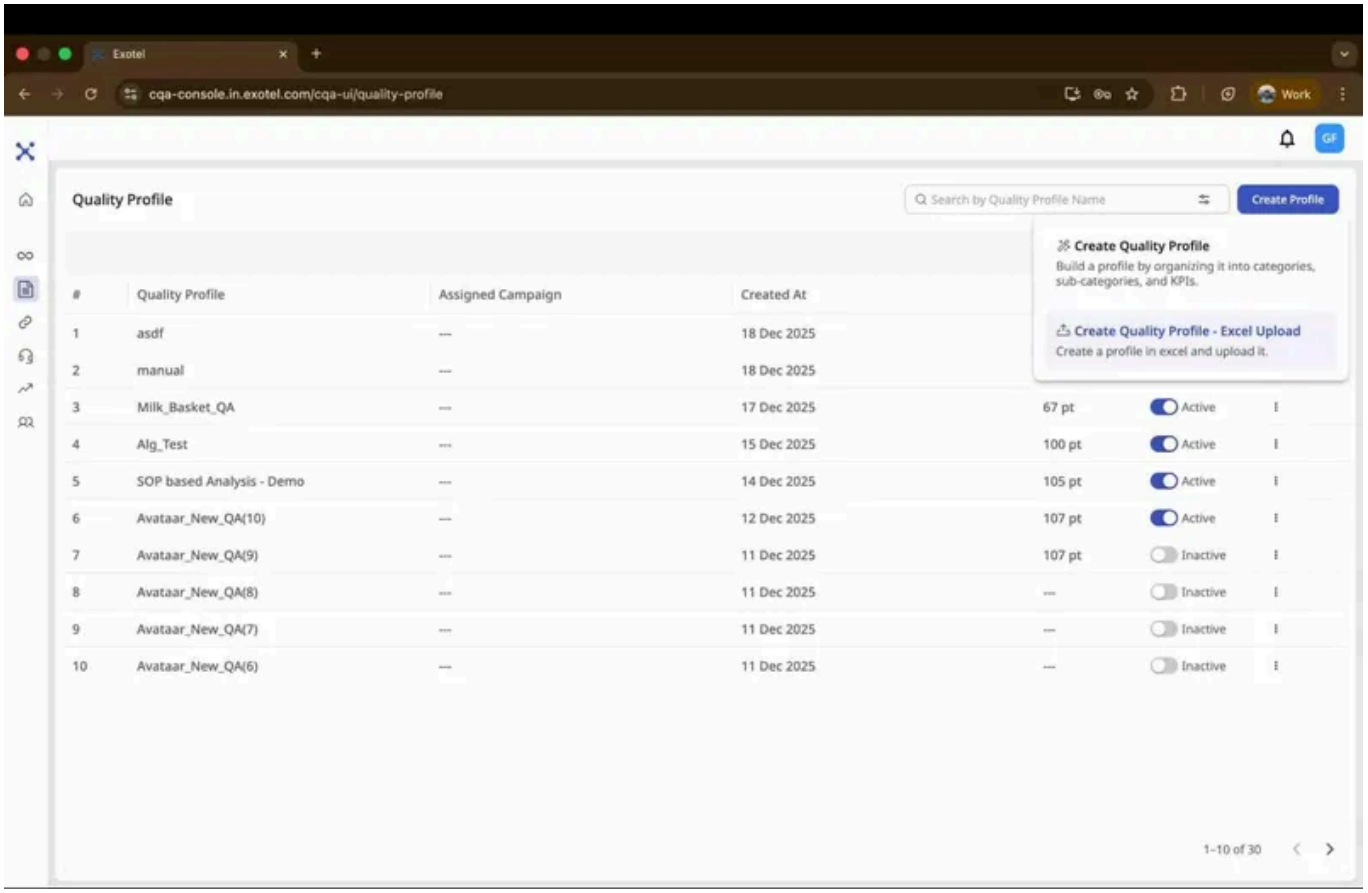
- **Rating:** A 1-5 scale for subjective measures.
- **Text**: A data extractor KPI that specifies what data to be extracted from the conversation (e.g., “What are the competitor products mentioned by the customer”).

- **Criticality:** Set the criticality level to automatically zero out the score for the entire category, sub-category or the quality profile, regardless of other passing KPIs.
- **KPI Question:** Enter the full, detailed prompt for the AI (e.g., "Did the agent introduce themselves by name?").
- **Allow Scoring**: Enable/Disable scoring for the KPI. Note that the scoring will be disabled automatically for KPI input type of *Text*.

6. **Save:** Click **Save Profile**.

4.2.2. Method B: Excel Upload (Bulk Creation)

Use this method to create large, complex profiles offline and upload them instantly.



1. Download the Template

1. Navigate to **Quality Profiles** and click **Create Profile**, and click **Create Quality Profile - Excel Upload**.

2. Click on **Download our Sample Excel**

2. Fill the Excel Template

- **Category & Sub-category:** Define your sections here (e.g., "Soft Skills" -> "Empathy").
- **KPI:** A short identifier for reports (e.g., "Politeness").
- **KPI Question:** The detailed instruction for the AI.
- **KPI Type:** Specify "Yes/No," "Selection,", "Rating", or “Text”.
- **KPI Option Label**: Specify the expected options to be displayed as outcomes.
- **KPI Option Weightage**:
    - **For Yes/No:** You will see one row for "Yes" and one row for "No." Assign points to each (e.g., Yes = 5, No = 0).
    - **For Selection:** Create one row for every possible option/answer.
    - **For Rating**: Mention the range between which the rating has to be applied.
- **Criticality:** Mark specific KPIs as "Critical" by specifying the criticality level as "Category" or “SubCategory” or “Profile” in the designated column if applicable.

3. Upload and Validate

1. Return to the **Quality Profiles** page.
2. Select **Upload Excel**.
3. Choose your filled file. The system will validate the structure and create the profile.
4. You can now open the profile in the UI to make any final tweaks before activating it.

Note: You can also **Download** an existing profile to make edits in Excel, then re-upload it to update the version.

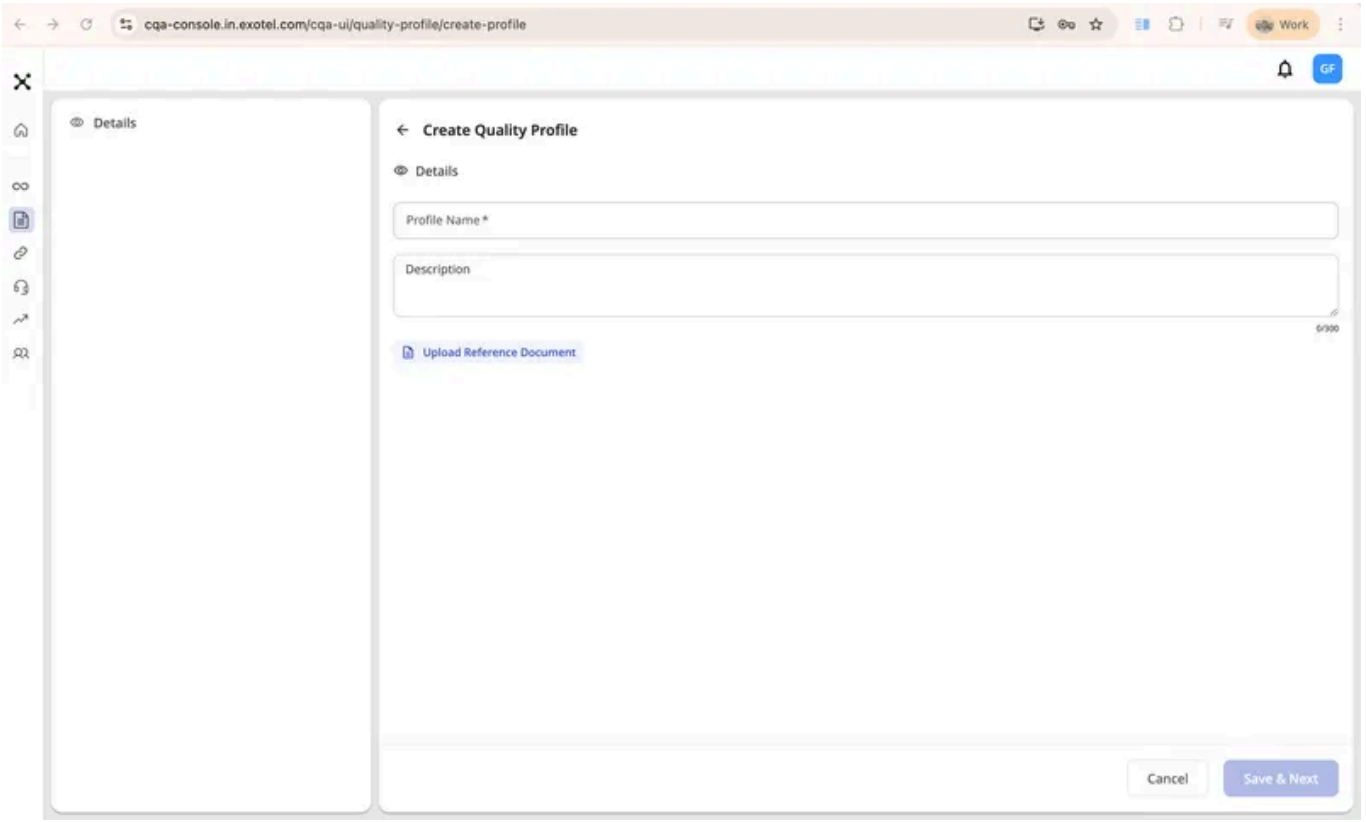
4.2.3 Configuring SOP Based Analysis

Goal:

Evaluation Context: Reduce manual effort in writing KPI descriptions by allowing the AI to fetch reference context directly from your company's Standard Operating Procedures (SOPs).

Coaching Suggestions: When a KPI scores below the maximum, the AI generates a coaching suggestion grounded in this document. The more comprehensive and detailed

your SOP, the more specific and actionable the suggestions will be.



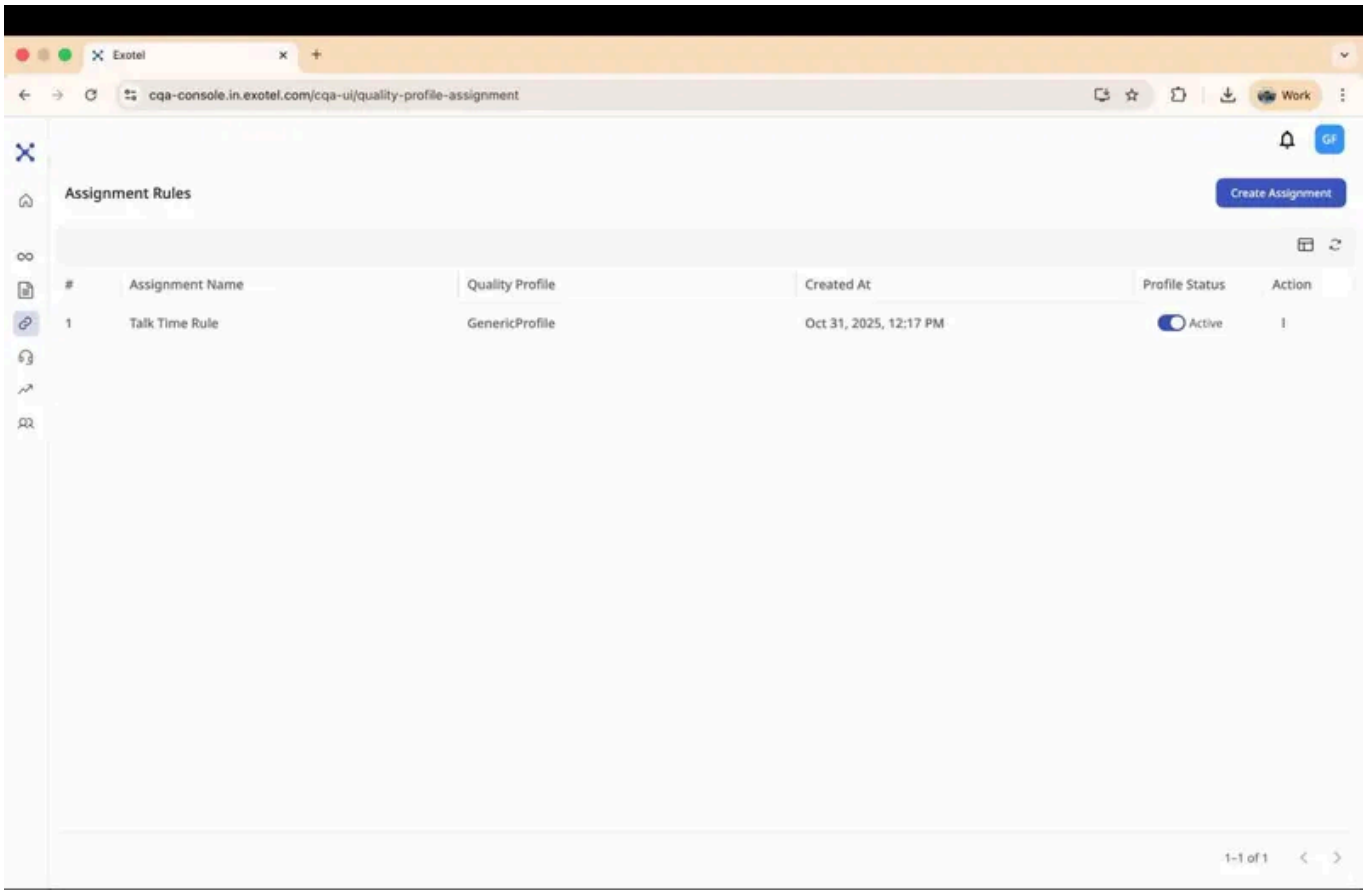
How it Works: Instead of typing out every single rule an agent must follow for a specific KPI, you can attach your existing documentation. The AI will read the document and evaluate the call based on your official guidelines.

Steps to Attach an SOP:

1. **Navigate to the Profile:** While creating or editing a **Quality Profile**, look for the **Upload Reference Document** button.
2. **Choose Upload Method:**
    - **File Upload:** Upload your documents directly from your computer. Supported formats are .**PDF, .txt, and .docx**.
    - **URL Link:** If your SOPs are hosted online (e.g., Google docs, Microsoft 365), paste the **publicly accessible link**.
3. **Map to KPIs:** Once uploaded, the system will use this knowledge base to answer the KPIs defined in your profile.
4. **Save Profile:** Proceed to save and activate your Quality Profile. The AI will immediately begin referencing the SOP for all new interactions routed to this profile.

4.3. Assignment Rules (Automation)

Goal: Automate the quality assurance process by linking specific calls to specific Quality Profiles.



4.3.1. How it Works

Instead of manually selecting calls to audit, you create Rules. As recordings stream into the platform, the system checks their metadata. If a call matches a rule, it is immediately analyzed using the assigned profile.

Multiple Rules Matching the Same Interaction:

The system evaluates all active assignment rules for every incoming recording – not just the first match. Before analysis begins, it collects the Quality Profiles assigned by all matching rules into a distinct set. One analysis runs per unique Quality Profile in that set.

Situation	Example	Result
One rule matches and assigns one profile.	Rule A matches a call and assigns Quality Profile 1.	One analysis runs (Quality Profile 1).
One rule matches and assigns multiple profiles.	Rule A matches a call and assigns Quality Profile 1 and Quality Profile 2.	Two analyses run (one per profile).
Multiple rules match and assign different profiles.	Rule A matches and assigns Quality Profile 1. Rule B also matches and assigns Quality Profile 2.	Two analyses run (one per distinct profile).
Multiple rules match and assign the same profile.	Rule A matches and assigns Quality Profile 1. Rule B also matches and assigns Quality Profile 1.	One analysis runs (Quality Profile 1 – deduplicated).

Configuration tips:

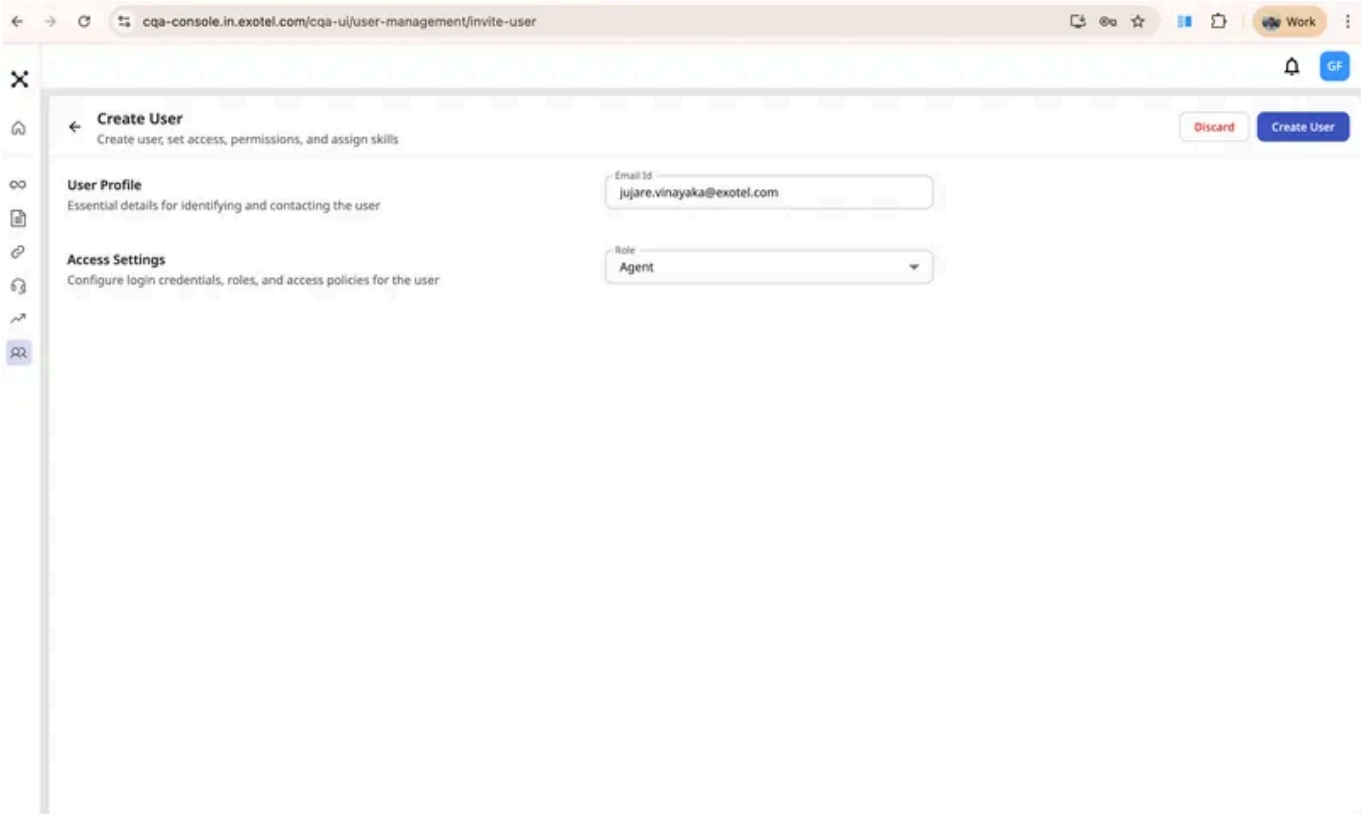
- Use overlapping rules when you intentionally want one interaction evaluated under multiple profiles (e.g., a Compliance profile and a Coaching profile).
- If you want only one analysis per interaction, design your rules so matched conditions resolve to a single distinct profile.

4.3.2. Creating an Assignment Rule

1. Navigate to **Assignment Rules**.
2. Click **Create Assignment**.
3. **Select Profile:** Choose the Quality Profile to apply (e.g., "Sales Profile").
4. **Add Filters (Define Conditions):** Build logic statements using your Metadata fields.
    - *Example:* IF Queue Name **IS** Support_L1 **AND** Talk Time **IS GREATER THAN** 60 seconds.
    - *Result:* Only calls from the Support Queue that are longer than a minute will be scored against the "Sales Profile" .
5. **Activate:** Save the rule. Automation begins analysis against each quality profile for all new incoming calls.

4.4. Managing and Inviting Users

Goal: Instantly add new team members to your workspace and manage role hierarchies.

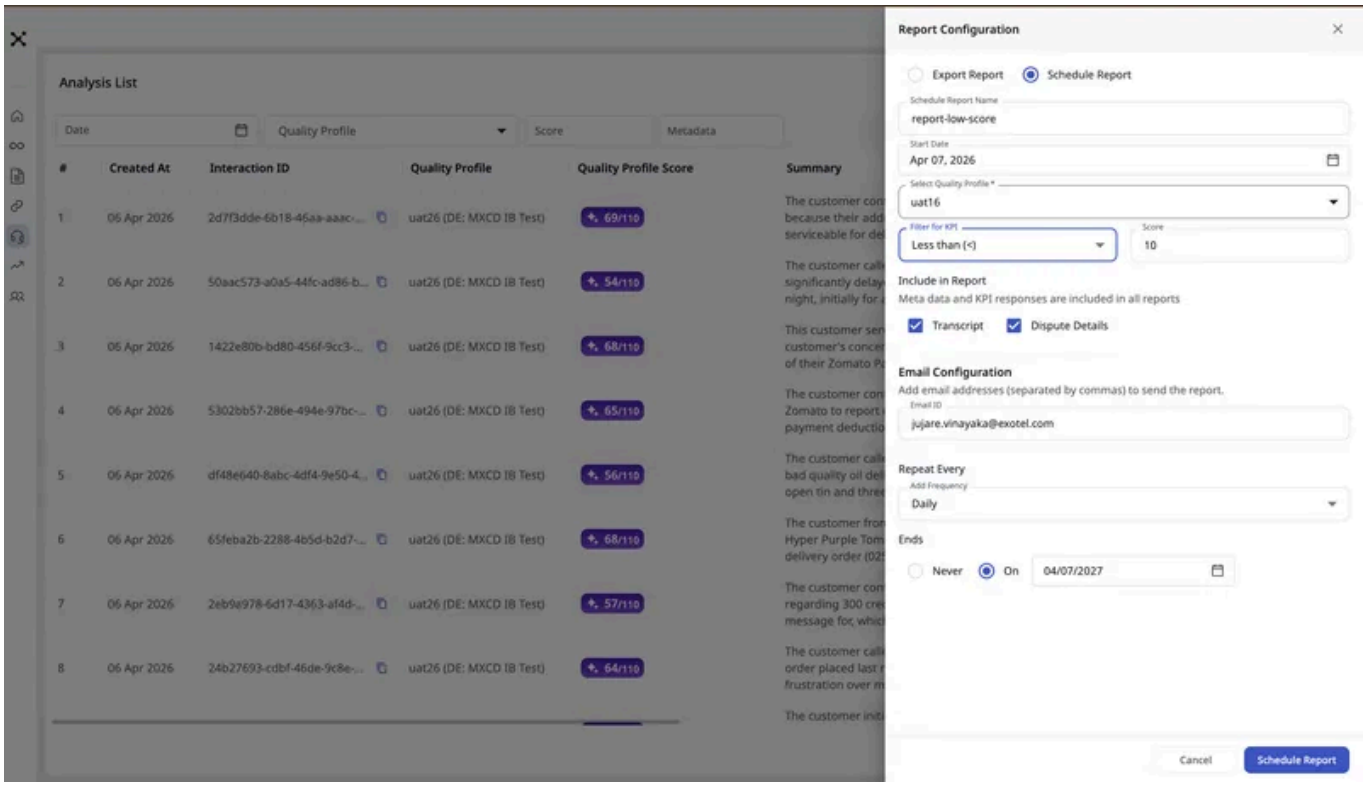


Steps to Invite a New User:

1. **Navigate:** Click on **User Management** in the left-hand sidebar.
2. **Create:** Click the **+ Create** button located in the top right corner.
3. **User Profile:** Enter the new user's **Email Id**.
4. **Access Settings:** Select the user's **Role** from the dropdown menu (choose either **Agent** or **Supervisor**). *(Note: For security and hierarchy management, Admins cannot invite other Admins).*
5. **Send Invite:** Click **Create User**. The system will immediately dispatch a "Welcome to CQA!" email with a registration link to the user.

4.5 Report Scheduling

Goal: Automate the generation and delivery of Analysis reports, instead of manually exporting data from the Analysis List.



Key Concepts:

Concept	Description
Schedule	A named configuration that defines what report to generate, how often, and where to deliver it.
Frequency	How often the report runs: **Daily** (every day), **Weekly** (every Monday), or **Monthly** (1st of the month).
Quality Profile	Each schedule is scoped to one Quality Profile. The report includes all analyses matching that profile within the reporting window.
Recipients	Up to 10 email addresses that receive the generated report as an attachment.
Report Format	Excel (default) or CSV.
Content Options	Toggle whether to include transcripts, summaries, and dispute details in the report.

Steps for creating a Report Schedule:

1. Navigate to the **Analysis List** page and click **Export Report**.
2. In the **Report Configuration** dialog, select **Schedule Report** (instead of Export Report).

3. **Schedule Report Name** – Give the schedule a descriptive name.
4. **Start Date** – Pick the date from which the schedule should begin running.
5. **Select Quality Profile** – Choose the profile whose analyses you want in the report.
6. **Filter for KPI / Score** – Optionally narrow results by specific KPIs or score thresholds.
7. **Include in Report** – Check **Transcript** and/or **Dispute Details** to include them (metadata and KPI responses are always included).
8. **Email Configuration** – Enter the email addresses (comma-separated) that should receive the report.
9. **Repeat Every** – Select the frequency: **Daily**, **Weekly**, or **Monthly**.
10. **Ends** – Choose **Never** (runs indefinitely) or **On** a specific date.
11. Click **Schedule Report** to save.

Once created, the schedule runs automatically. Reports are delivered via email to the configured recipients.

4.6. PII Redaction

Goal: Protect sensitive customer data by automatically detecting and masking personally identifiable information (PII) in transcripts, scores, summaries, and reports.

4.6.1. How it Works

When PII redaction is enabled for your tenant, the CQA analysis pipeline automatically detects sensitive information in conversation transcripts and masks it before the data appears anywhere in the platform. The redacted content is displayed consistently across the transcript view, KPI result details, conversation summaries, and exported reports.

4.6.2. Supported PII Categories

CQA supports redaction across 12 predefined categories:

Category
Phone Number
Email Address
Person Name
Physical Address
PAN (India)
Aadhaar (India)
Date of Birth
Bank Account
Credit Card
URL
IP Address
ID Card Number

4.6.3. Enabling PII Redaction

PII redaction is configured on a per-tenant basis by the Exotel delivery team. To enable PII redaction or customize which categories are active for your tenant:

1. Contact your **Customer Success Manager**.
2. Specify which PII categories you want enabled (or request all categories).
3. The delivery team will configure your tenant settings.
4. Once enabled, all **newly processed interactions** will have PII redacted according to your configuration.

Important: PII redaction changes apply only to interactions processed after the configuration is applied. Previously analyzed interactions are not retroactively modified.

4.6.4. What to Expect After Enablement

- **Transcripts**: Detected PII in enabled categories is replaced with placeholder text (e.g., [REDACTED]).
- **KPI Results**: If a KPI answer references redacted PII, the redacted version is shown.
- **Summaries**: Conversation summaries reflect redacted content.
- **Reports**: Downloaded or scheduled reports contain the redacted data — consistent with what is displayed in the UI.

1.4. Operational Workflows

Target Audience:

QA Analysts, Supervisors, Agents

Description:

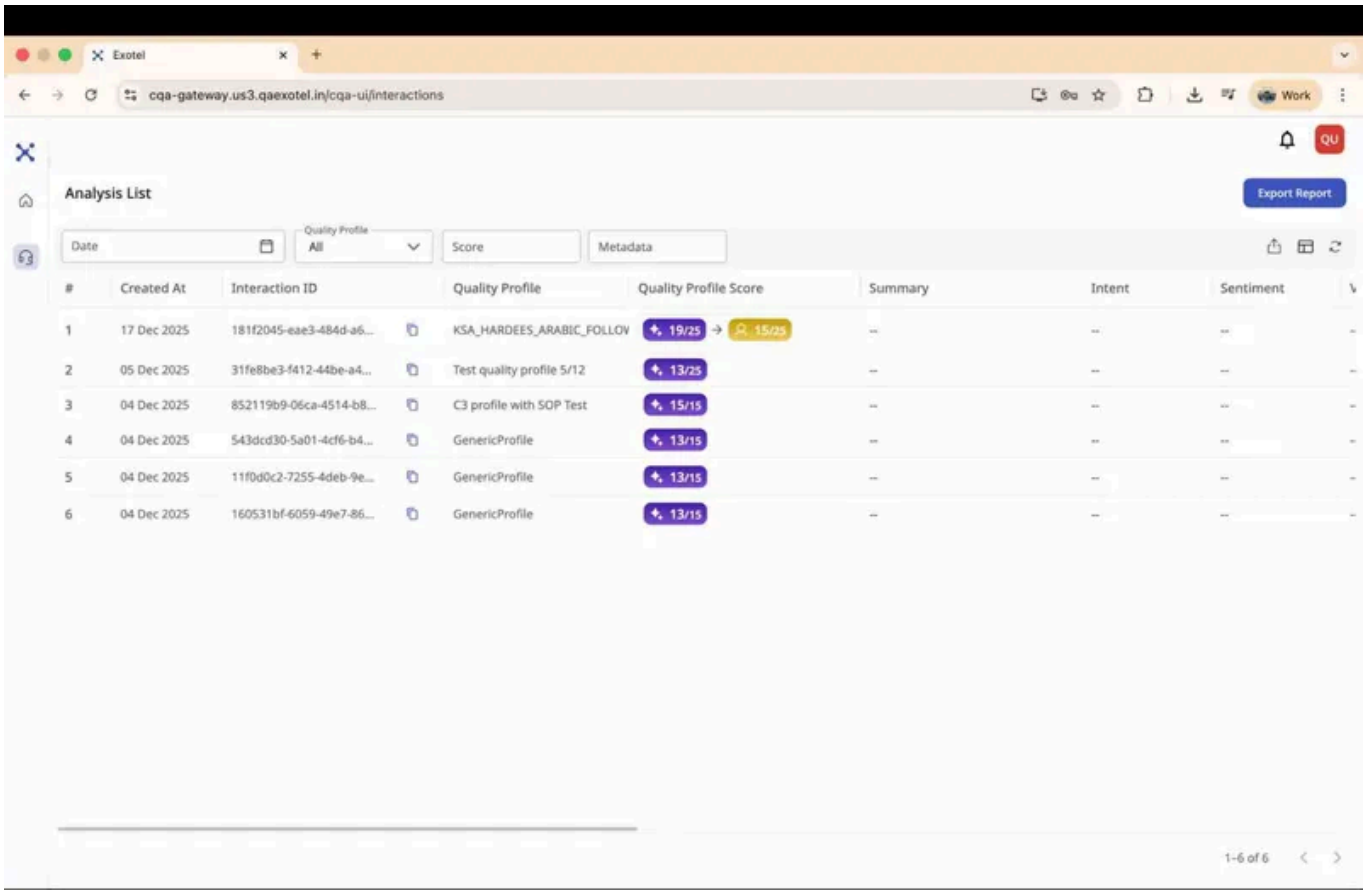
The day-to-day guide for users actually interacting with the processed data, scoring calls, and managing disputes.

5. Operational Workflows

This section outlines the daily tasks performed by QA Analysts, Supervisors, and Agents to monitor performance, validate scores, and manage data.

5.1. Workflow A: Monitoring & Reviewing Analyzed Calls

Context: The **Analysis List** acts as the central log for every call processed by the system. Supervisors use this view to monitor real-time traffic and identify interactions requiring attention.



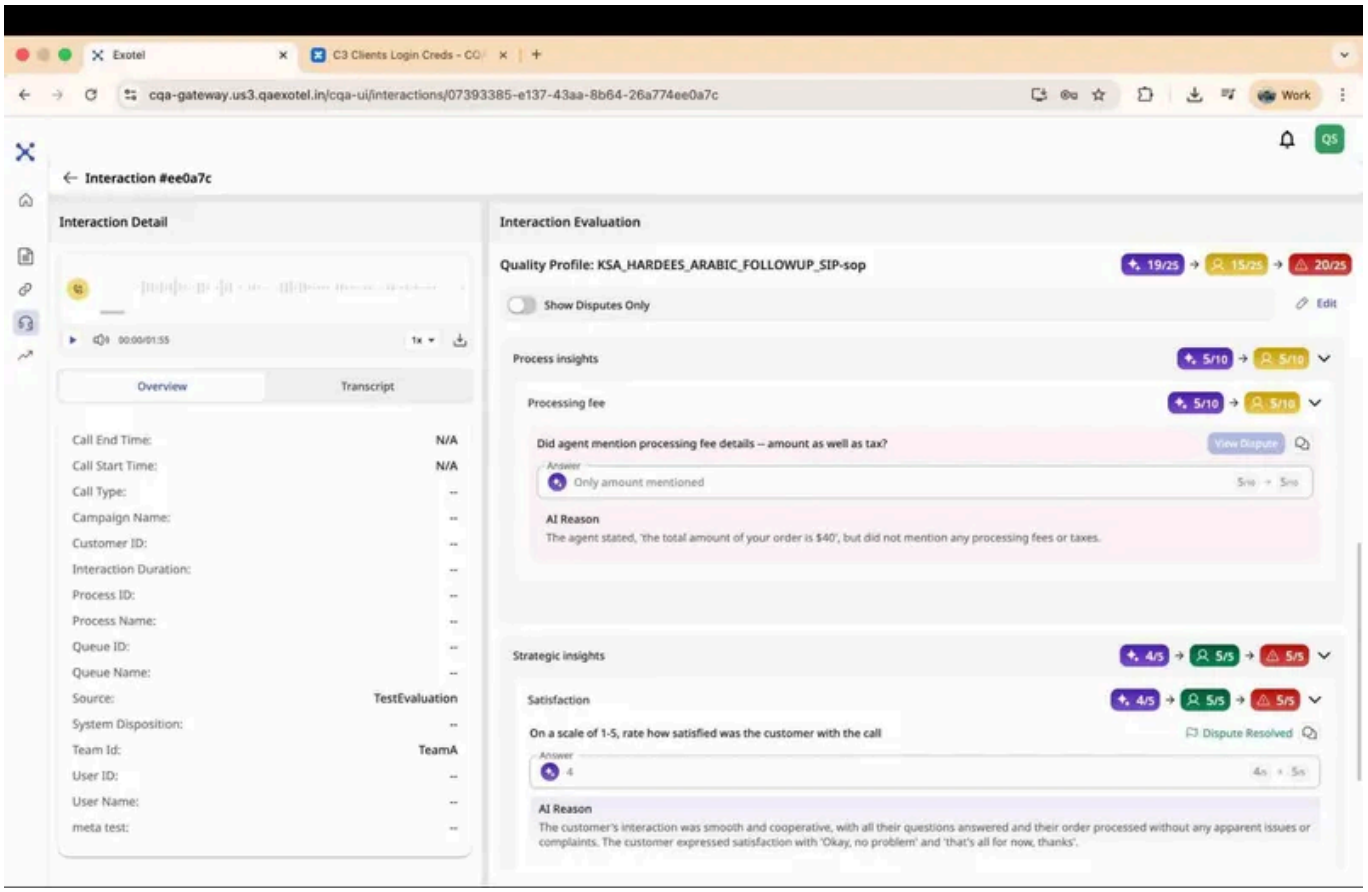
Steps:

1. **Navigate:** Click **Analysis List** in the sidebar.
2. **Filter & Search:**
    - Use the filter bar to isolate specific interactions. You can filter by **Date**, **Score**, **Quality Profile**, or specific **Metadata** (e.g., "Show me calls from *Campaign A*").
3. **Customize View:**
    - Click the **Columns** icon to configure which data fields appear in the table. You can show or hide fields like *Agent Name*, *Queue*, or *Duration* to create a view that suits your workflow. This selection is saved for future sessions .
4. **Export Data:**
    - **One time Export:**
        - Click the **Export** button to download the current view (including applied filters) as a CSV file containing Interaction IDs and Scores.
    - **Automated Report Delivery via Schedules:**
        - In addition to manual exports from the Analysis List, CQA supports scheduled reports that are automatically generated and delivered on a recurring basis.

Note on Language: For tenants on higher-tier plans, note that the Analysis List always displays the **English summary** for every interaction, regardless of the original spoken language. To view the transcript and summary in the speaker's native language, click on the Interaction ID to open the detailed view (see Workflow B below).

5.2. Workflow B: Deep-Dive Interaction Review

Context: Once a specific call is identified in the Analysis List, Supervisors can drill down to understand *why* a score was given.



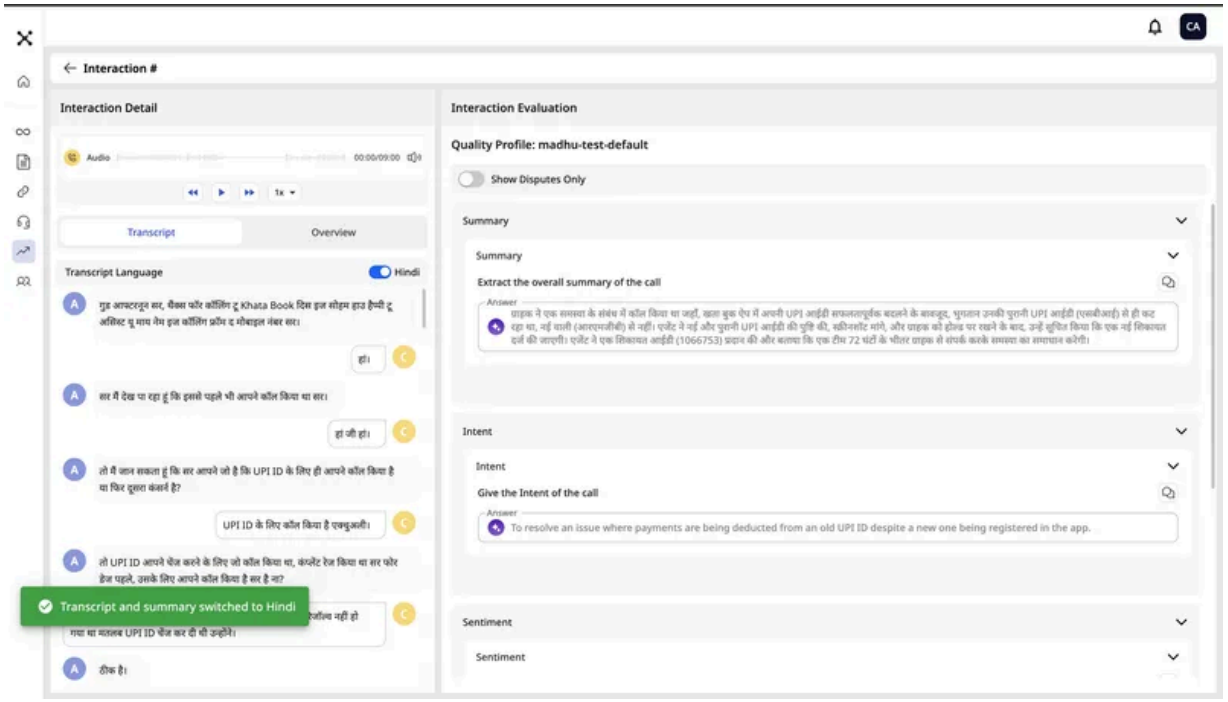
Steps:

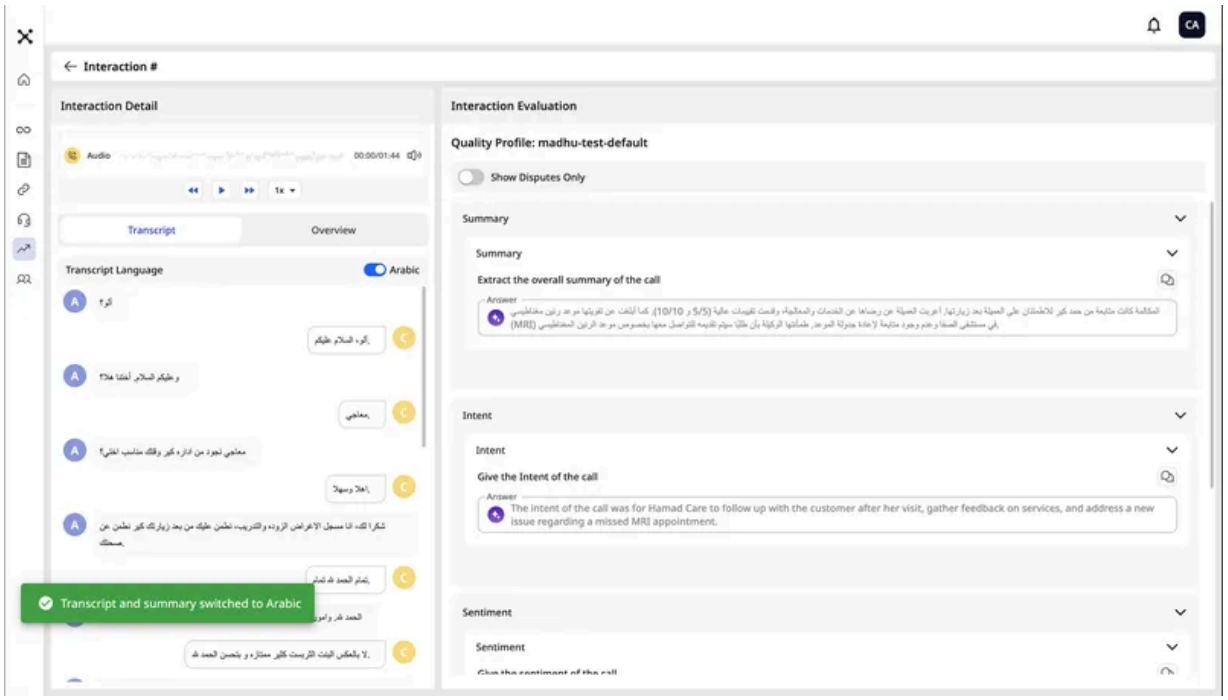
1. **Open Interaction:** Click on any **Interaction ID** in the list to open the detailed **Interaction View**.
2. **Review Media:**
    - **Player:** Use the embedded audio player to listen to the call recording.
    - **Transcript:** Switch to the **Transcript** tab to read the speech-to-text log of the conversation. By default, the transcript is displayed in **English**.
        - **Language Toggle** *(requires high-tier plans)*: A toggle control appears on the Interaction Details page. Click it to switch between the **English** transcript and

the **detected native language** transcript (e.g., Hindi, Arabic). The toggle label dynamically updates to show the detected language – for example, **[Hindi]** or **[Arabic]**.

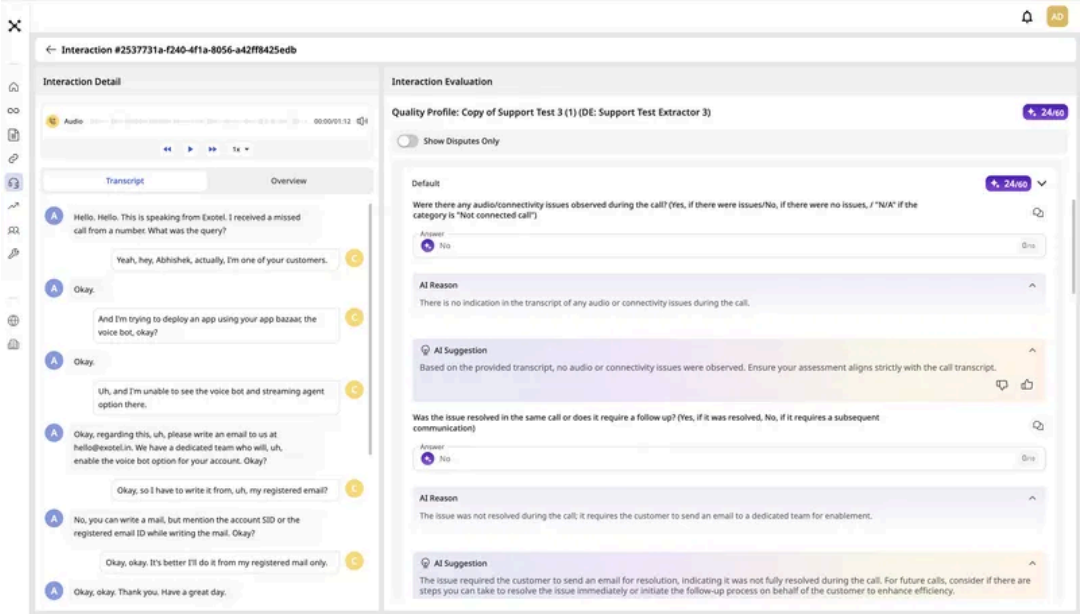
- **RTL Support**: When viewing calls in Right-to-Left languages such as Arabic, switching to the native language view automatically applies **RTL text formatting** for natural reading.

- **Summary**: The interaction summary also switches language when the toggle is used, providing context in the selected language.
- **Note**: The language toggle affects Transcripts and Summaries only. AI Reasoning remains in English.





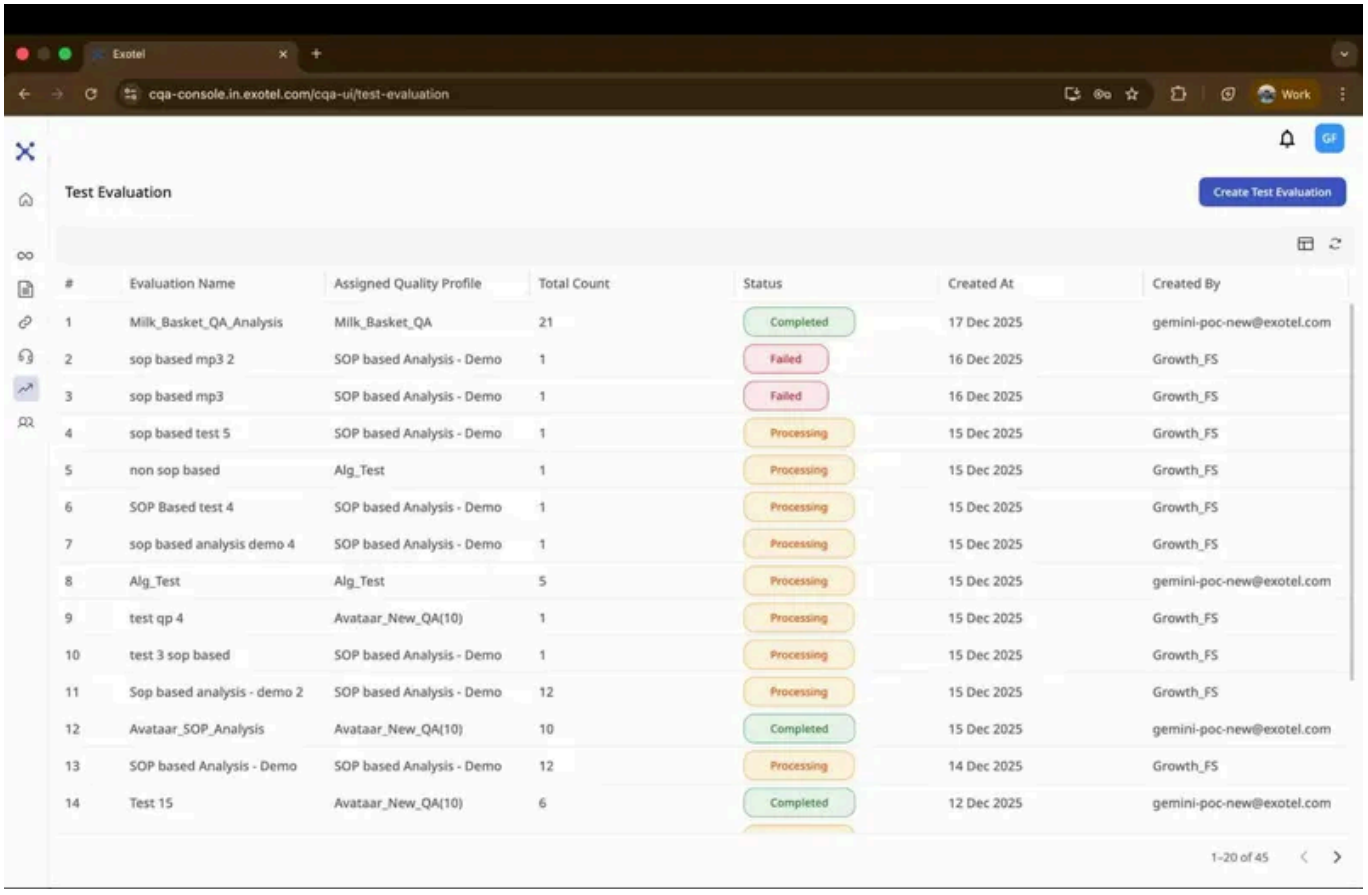
3. **Analyze Scores:**
    - **Scorecard View:** The right panel displays the full scorecard.
    - **Category Breakdown:** View scores aggregated by **Category** (e.g., "Soft Skills") and **Sub-category**.
    - **KPI Details:** Expand any Category to see individual KPI results.
    - **AI Reasoning:** Click a specific KPI to see the **AI Reason**, explaining the logic and evidence from the transcript used to determine the pass/fail result.
    - **AI Suggestions**: *For every KPI that scores below the maximum, CQA automatically generates an actionable coaching tip derived from your uploaded Reference Document (SOP). When no SOP is available, the system provides generic best-practice guidance. This transforms CQA from a passive auditing tool into an active coaching platform that closes the feedback loop for agents.*



- **Disputes**: Click on **Show Disputes Only** to view only the KPIs that have disputes.

5.3. Workflow C: Ad-Hoc Testing (Test Evaluations)

Context: Use this workflow to test a new Quality Profile before going live, or to analyze a specific offline batch of recordings that weren't processed automatically.



#	Evaluation Name	Assigned Quality Profile	Total Count	Status	Created At	Created By
1	Milk_Basket_QA_Analysis	Milk_Basket_QA	21	Completed	17 Dec 2025	gemini-poc-new@exotel.com
2	sop based mp3 2	SOP based Analysis - Demo	1	Failed	16 Dec 2025	Growth_FS
3	sop based mp3	SOP based Analysis - Demo	1	Failed	16 Dec 2025	Growth_FS
4	sop based test 5	SOP based Analysis - Demo	1	Processing	15 Dec 2025	Growth_FS
5	non sop based	Alg_Test	1	Processing	15 Dec 2025	Growth_FS
6	SOP Based test 4	SOP based Analysis - Demo	1	Processing	15 Dec 2025	Growth_FS
7	sop based analysis demo 4	SOP based Analysis - Demo	1	Processing	15 Dec 2025	Growth_FS
8	Alg_Test	Alg_Test	5	Processing	15 Dec 2025	gemini-poc-new@exotel.com
9	test qp 4	Avataar_New_QA(10)	1	Processing	15 Dec 2025	Growth_FS
10	test 3 sop based	SOP based Analysis - Demo	1	Processing	15 Dec 2025	Growth_FS
11	Sop based analysis - demo 2	SOP based Analysis - Demo	12	Processing	15 Dec 2025	Growth_FS
12	Avataar_SOP_Analysis	Avataar_New_QA(10)	10	Completed	15 Dec 2025	gemini-poc-new@exotel.com
13	SOP based Analysis - Demo	SOP based Analysis - Demo	12	Processing	14 Dec 2025	Growth_FS
14	Test 15	Avataar_New_QA(10)	6	Completed	12 Dec 2025	gemini-poc-new@exotel.com

Steps:

1. **Navigate:** Click **Test Evaluation** in the sidebar.
2. **Create New:** Click the button to start a new test.
3. **Configuration:**
    - **Name:** Give your test a unique name (e.g., "Oct Sales Audit").
    - **Select Profile:** Choose the **Quality Profile** you wish to test.
4. **Upload Data:**
    - Excel upload: Upload an Excel file containing the *publicly accessible* **Recording URLs or Text URLs** and any relevant **Metadata** you want to associate with these calls.
    - Audio upload: Upload .mp3 or .wav files directly for the audio analysis.
    - Text upload: Upload .txt, .pdf files directly for the text analysis.
5. **Monitor Progress:**
    - The system processes files in real-time. You do not need to wait for the entire batch to finish; you can click into the evaluation immediately to see row-by-row results as they populate.
6. **Review Outcomes:**
    - **Completed:** All files processed successfully.
    - **Partial Success:** Some files failed (e.g., invalid audio links). You can filter to view only the successful analyses .
7. **Export:** Enter your email address to receive a full export of the test results, including scores and transcript insights.

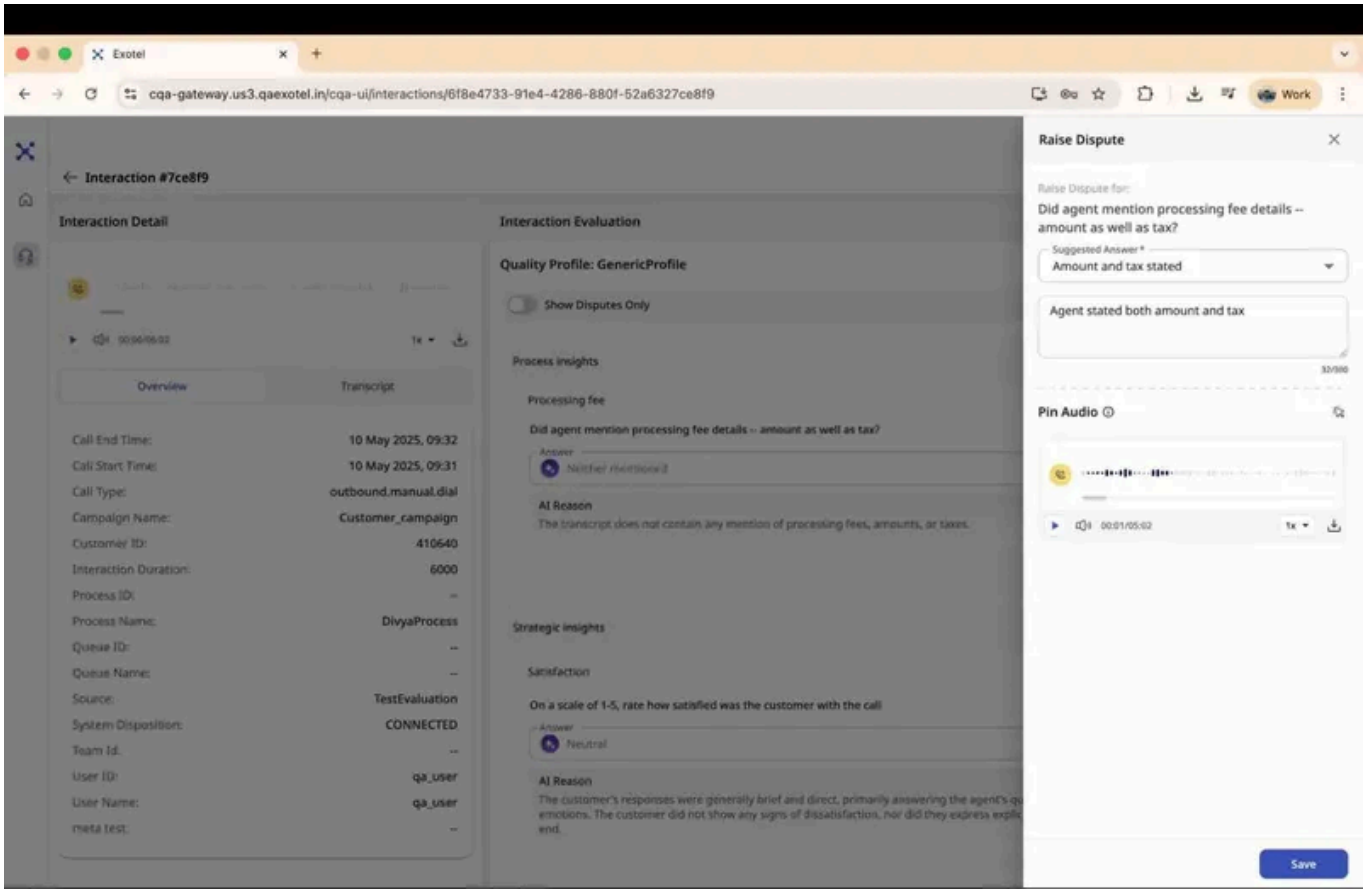
5.4. Workflow D: Dispute Resolution

Context: CQA supports a feedback loop where Agents can contest AI scores, and Supervisors can review/overturn them.

1. Raising a Dispute (Agent Action)

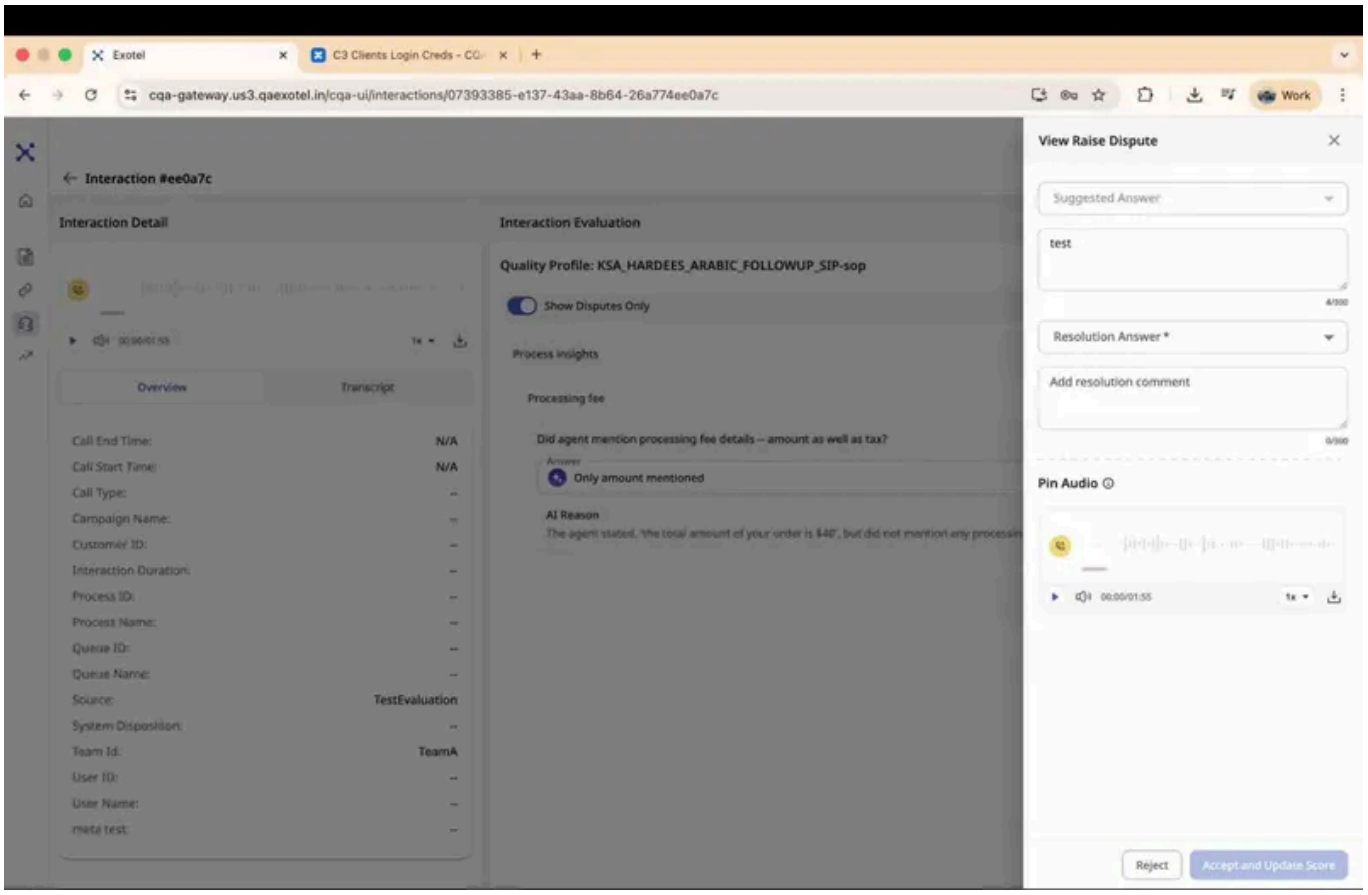
- Open the **Interaction View** for your evaluated call.
- Locate the specific KPI you disagree with.
- Click the **Raise Dispute** icon.
- **Form Input:**

    - **Suggested Answer:** Select what you believe the correct answer is (e.g., change "No" to "Yes").
    - **Comment:** Type your reasoning (e.g., "I mentioned the tax at 02:14").
    - **Pin Audio**: Pin the specific point in audio relevant to the KPI.
- **Submit:** The dispute is logged and flagged for Supervisor review.



2. Resolving a Dispute (Supervisor Action)

- In the **Analysis List**, look for interactions flagged with **"Open Disputes"**.
- Open the interaction and toggle the **"Show Disputes Only"** switch to filter the scorecard.
- **Review:** Read the Agent's comment and compare it with the AI's reasoning/transcript.
- **Action:**
    - Click on **Edit** to then enable dispute resolution.
    - **Reject:** The score remains as is. You can add a rebuttal comment.
    - **Accept & Update:** The system automatically recalculates the score (e.g., changing a 0 to a 10) and updates the total.
- **Finalize:** Click **Acknowledge** to save the changes and close the dispute.



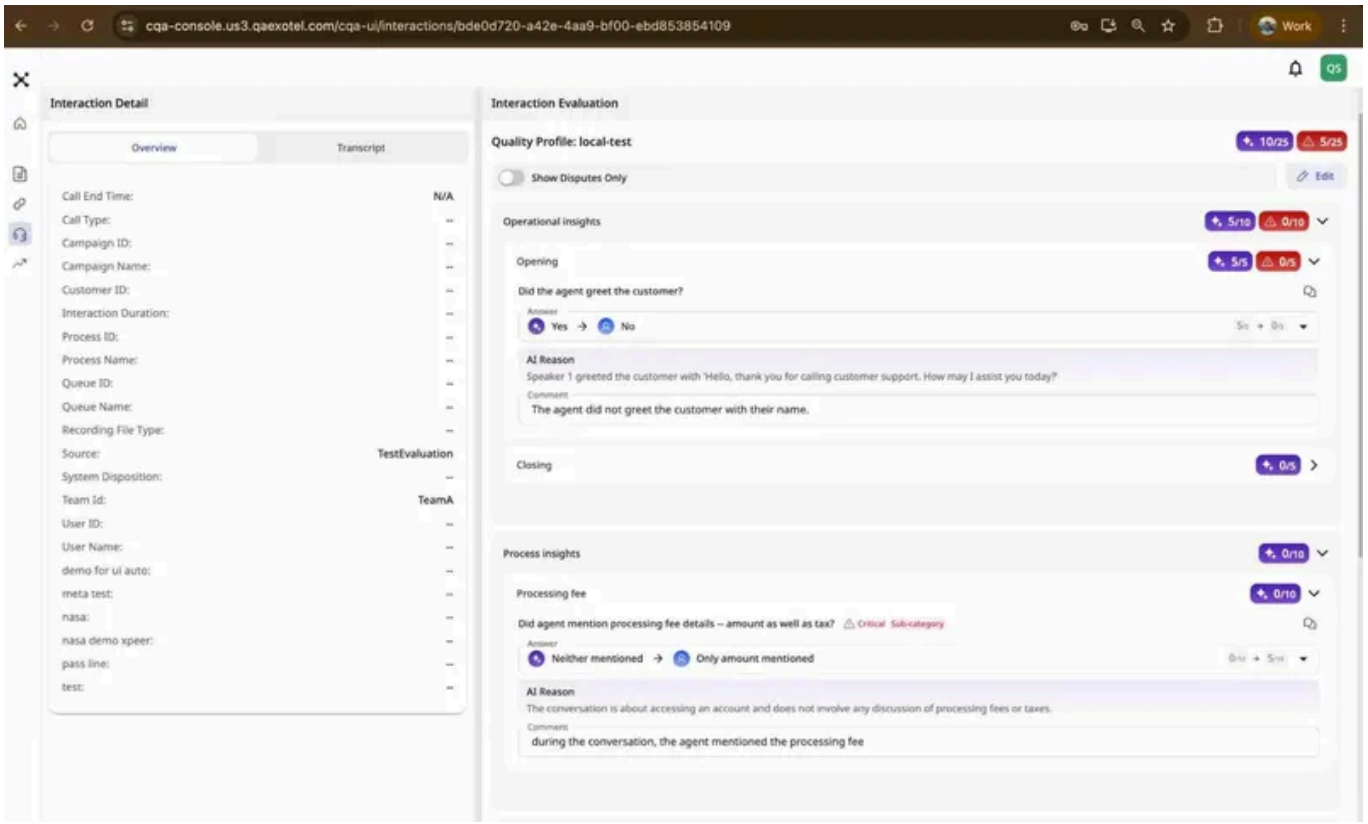
5.5. Workflow E: Manual Review and Edit

Context: While CQA automates scoring, there are instances where a Supervisor or QA Lead needs to manually intervene to correct an AI evaluation or provide a human-verified score. This workflow allows you to override the system's output and document your reasoning.

Prerequisite: You must have **Supervisor** access to perform this action.

- **Select Interaction:** Navigate to the **Analysis List** and click on the **Interaction ID** of the call you wish to review.
- **Enable Edit Mode:** Open the interaction and click the **Edit** button to enable score modification.
- **Modify Answers:**
  - Scroll to the specific KPI you want to change.
  - Change the AI-generated answer to the correct option (e.g., changing "No" to "Yes").
- **Add Justification:** Upon changing an answer, you must add a **Comment** justifying the reason for the manual update.
- **Finalize:**
  - Click the **Acknowledge** button to view a summary of the changes.

- **Approve** the changes to save. The system will immediately update the KPI score and recalculate the total Quality Score for the interaction.



1.5. Data Integrations

Target Audience:

IT Teams, System Administrators

Description:

A technical reference page explaining how conversational data flows into CQA from Exotel products or external systems.

6. Integrations & Data Ingestion

CQA delivers value by analyzing conversations. To do this, it must have access to call recordings and their associated metadata. CQA supports various integration methods to ingest data from different telephony systems, CRMs, and storage solutions – and to export analysis results to external destinations.

- **Exotel Ecosystem Integrations** (Section 6.1): For customers on Exotel platforms (ECC 4X, ECC 6X, Exolite).
- **Universal & External Integrations** (Section 6.2): For customers connecting via SFTP, Amazon S3, Email, or the Standard API.
- **Data Integration Console** (Section 6.4): A self-service UI for administrators to create and manage connectors, API keys, and scheduled jobs. Contact your CSM to enable.

Once an integration is established and the customer is onboarded (Tenant/User creation + Metadata/QP/Assignment Rule configuration), data ingestion and analysis occur automatically.

6.1. Exotel Ecosystem Integrations

For customers using Exotel's proprietary platforms.

6.1.1. ECC4x

In this setup, CQA can either function separately, or can be embedded directly within the ECC4x interface via an iFrame, providing a seamless user experience.

- **Data Flow**: CQA fetches recordings automatically on a daily basis, either via App-server APIs or by pulling reports uploaded on CQA server (S3) via SFTP.
- **SFTP approach – How it Works (Backend)**:
  - VLA module on ECC generates and uploads a report to CQA server (S3) via SFTP.
  - CQA uses the Voice Log API to fetch the actual audio recording using the Call SID available in the SFTP report.
  - The system analyzes the call based on configured Assignment Rules.
  - **On-Premise Requirements**: VLA must be enabled on the ECC4x setup.
- **App-Server API approach – How it Works (Backend)**:
  - ECC pushes recordings and metadata information in its own table.
  - CQA uses the App-Server API to fetch the actual audio recording using the Call SID available in the ECC table.
  - The system analyzes the call based on configured Assignment Rules.
  - **On-Premise Requirements**: Customer needs to whitelist the app-server so that the APIs can directly access the tables.

```
If the Data Integration Console is enabled for your tenant, you can create a connector for this platform from the Console UI. Once created, the data import job is scheduled automatically — you do not need to manually create or trigger a job. See Section 6.4 for details.
```

6.1.2. ECC6x

This is a deeper, native integration designed for high-throughput environments.

- **Data Flow**: Bi-directional streaming via a Kafka Pipeline.
- **On-Premise Requirements**: For on-prem ECC deployments, the only network configuration required is whitelisting the CQA IP address (CQA should be able to listen to the customer's kafka servers).
- **How it Works (Backend)**:
  - **Ingestion**: CQA consumes recordings and metadata directly from the ECC Kafka stream.

- **Feedback**: After analysis, CQA pushes the results (scores/data) back into the Kafka pipeline for ECC to consume.
- **Event driven per conversation**: CQA picks it up as and when a conversation event is generated by ECC, making this near-realtime analysis.

```
If the Data Integration Console is enabled for your tenant, you can create a connector for this platform from the Console UI. Once created, the data import job is scheduled automatically — you do not need to manually create or trigger a job. See Section 6.4 for details.
```

6.1.3. Exolite Platform

For users on the standard Exolite platform, CQA can be made accessible via a separate URL.

- **Data Flow**: CQA automatically fetches recordings daily using the Bulk Call API.
- **How it Works**: The integration operates entirely on the backend via API connectivity. Users perform standard configuration (Quality Profiles, Rules), and CQA handles the data retrieval automatically.

```
If the Data Integration Console is enabled for your tenant, you can create a connector for this platform from the Console UI. Once created, the data import job is scheduled automatically — you do not need to manually create or trigger a job. See Section 6.4 for details.
```

6.2. Universal & External Integrations

For customers using 3rd-party contact centers (CCaaS), CRMs, or cloud storage. These integrations support both data import (ingesting recordings and metadata into CQA) and data export (sending analysis results to external destinations). If the Data Integration Console is enabled, these connectors can be created and managed from the UI (see Section 6.4).

6.2.1. Standard API

CQA provides a Standard API designed to make the platform agnostic. This allows any external system to send data into CQA and retrieve analysis results. Refer to the API

Reference Guide for details.

- **Import (Ingress)**: External systems push conversations and metadata into CQA via the API. The API defines a strict schema for how conversations and metadata must be formatted. For external contact centers (e.g., Genesys, Salesforce), a middleware integration is typically built to bridge the external system and CQA – this middleware reads data from the source system, formats it per the CQA schema, and pushes it via the API.
- **Export (Egress)**: Analysis results (scores, parameters, metadata) are exposed via the API, allowing external systems to consume CQA insights in their own interfaces.
- **API Keys**: Programmatic access requires an API key. Keys can be generated from the Data Integration Console (if enabled) or requested from your CQA administrator. See Section 6.4.4 for key management.

```
Note: The Standard API can be used by customers or professional services
teams to build integrations that ingest data from external components into
CQA and fetch analysis results back.
```

6.2.2. Customer S3

This integration supports batch processing of recordings and metadata via Amazon S3 buckets. S3 can be used for both import and export.

- **Import (Ingress)**: A user or external system uploads conversations and metadata files (CSV format) to a designated S3 bucket. CQA authenticates, fetches the files, and processes the recordings according to active Assignment Rules.
- **Export (Egress)**: CQA can push analysis reports to a customer-owned S3 bucket. Export jobs can be configured with quality profile filters, date ranges, column selection, and file format (CSV or Excel).
- **Security**: Supports authenticated S3 buckets with IAM access key credentials.
- **Configuration**: Bucket Name, Region, Access Key, Secret Access Key, File Prefix, File Format.
- **Test Connection**: Validates the configured credentials and S3 bucket access before scheduling any jobs.

6.2.3. Customer SFTP

CQA supports connecting to customer-hosted SFTP servers for both importing conversation data and exporting analysis reports.

- **Import (Ingress)**: CQA connects to a customer SFTP server on a scheduled basis to pull CSV metadata files and associated audio recording URLs. The CSV must contain mandatory fields (e.g., external interaction ID) along with a URL for the audio recording and associated metadata (agent name, campaign ID, team name, etc.).
- **Export (Egress)**: CQA pushes analysis reports (CSV or Excel) to a customer SFTP server on a configured schedule.
- **Configuration**: Source Host (IP address), Port, Username, Password, Credential Type, File Format, Remote Directory.
- **Credential types**:
  - **Username/Password**: Standard credential-based authentication.
  - **SSH Public Key**: CQA generates a key pair from the backend. The public key is shared with the customer to add to their SFTP server's authorized keys. Contact CQA Support to configure public key authentication – the self-service UI for this credential type is not yet available.
- **Test Connection**: Validates the configured credentials and endpoint before scheduling any jobs.

6.2.4. Email Export

CQA supports exporting analysis reports to a configured email address.

- **Direction**: Export (Egress) only.
- **How it works**: When an email export job runs, the report is uploaded to Amazon S3 and a **download link** is sent to the configured email address. The report file (CSV or Excel) is **not** attached directly to the email. Each file is limited to **1,000 rows** – if a report exceeds this, multiple download links are included in the email.
- **Configuration**: Destination email address.
- **Security**: Agents and Supervisors can use the **Email Me** shortcut on the Analysis List to send reports to their own verified organizational email address only. They cannot specify a different destination.

- **Test Connection**: Validates the configured credentials and endpoint before scheduling any jobs.

6.3. Summary of Integration Capabilities

Integration Type	Primary Mechanism	Ingress	Egress	Prerequisite	Console Support
ECC 4X	SFTP Report OR App-Server API	✓	✗	VLA Enabled, IP white-listed (if On-Prem)	Yes (auto-scheduled)
ECC 6X	Kafka Pipeline	✓	✓	Whitelist CQA IP (if On-Prem)	Yes (auto-scheduled)
Exolite Platform	Bulk Call API	✓	✗	None	Yes (auto-scheduled)
Customer SFTP	SFTP Connector	✓	✓	SFTP credentials	Yes
Customer S3	S3 Connector	✓	✓	S3 bucket, IAM credentials	Yes
Email	Email Connector	✓	✓	Destination email	Yes
Standard API	REST API + API Key	✓	✓	API key	API Access page

6.4. Data Integration Console

Goal: Manage your data integration configuration – import connectors, export connectors, API keys, jobs, and execution tracking – from a self-service dashboard.

The Data Integration Console provides a visual interface for creating and managing how data flows into and out of CQA. It is available to Admin users and appears in the CQA sidebar under the **DATA INTEGRATION** and **AUTOMATION** sections.

```
Note: The Data Integration Console is not enabled by default. Contact your
```

```
Customer Success Manager to enable this feature for your tenant.
```

6.4.1. Console Overview

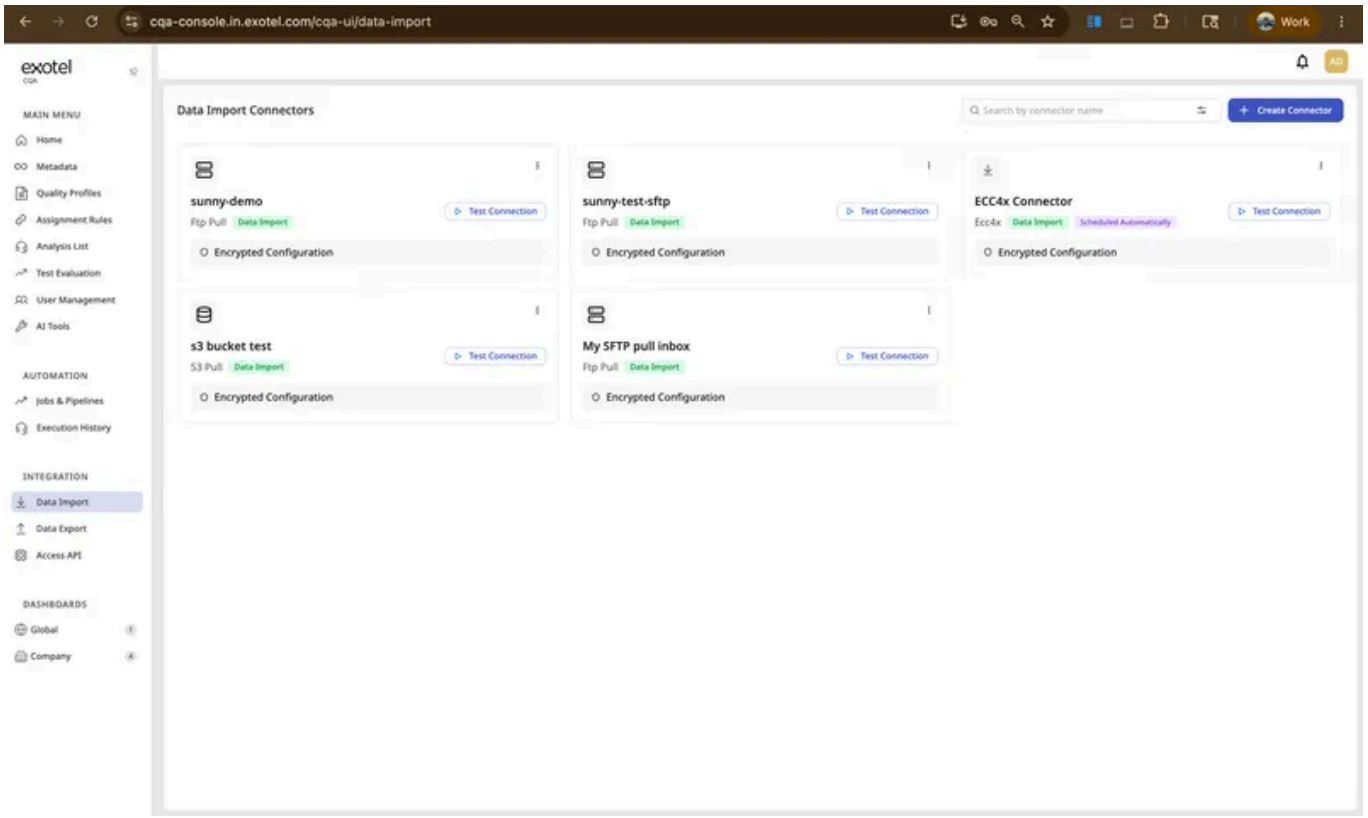
When enabled, the following pages are added to the CQA sidebar:

Section	Pages	Purpose
DATA INTEGRATION	Data Import	Create and manage connectors that bring data into CQA
DATA INTEGRATION	Data Export	Create and manage connectors that send analysis results out of CQA
DATA INTEGRATION	API Access	Generate and manage API keys for programmatic access
AUTOMATION	Jobs & Pipelines	Create and schedule automated jobs that link connectors to recurring tasks
AUTOMATION	Execution History	Track every job run with timestamps, status, and downloadable reports

Global action buttons are available from every page: **+ New Connector** and **+ New Job**.

6.4.2. Data Import Connectors

Data import connectors define where CQA pulls or receives recordings and metadata from.



Supported connector types:

Connector Type	Description
Customer SFTP	CQA connects to a customer-hosted SFTP server to pull CSV files and recordings
Customer S3	CQA connects to a customer-owned Amazon S3 bucket to pull CSV files and recordings
ECC 4X	Integration with Exotel's ECC 4X contact center platform
ECC 6X	Integration with Exotel's ECC 6X contact center platform
Exolite Platform	Integration with the Exolite platform

Creating a data import connector:

1. Navigate to **DATA INTEGRATION > Data Import** in the sidebar.
2. Click **+ New Connector**.
3. Enter a **Connector Name**.
4. Select the **Connector Type**.

5. Fill in the type-specific configuration fields:
    - **Customer SFTP**: Source Host (IP address), Port, Username, Password, Credential Type (Username/Password or SSH Public Key), File Format (CSV), Remote Directory.
    - **Customer S3**: Bucket Name, Region, Access Key, Secret Access Key, File Prefix, File Format (CSV).
    - **ECC 4X / ECC 6X / Exolite**: Platform-specific connection fields.
6. Click **Save**.

Test Connection: After creating a connector, click **Test Connection** on the connector card to verify that the configured credentials and endpoint are valid before scheduling any jobs.

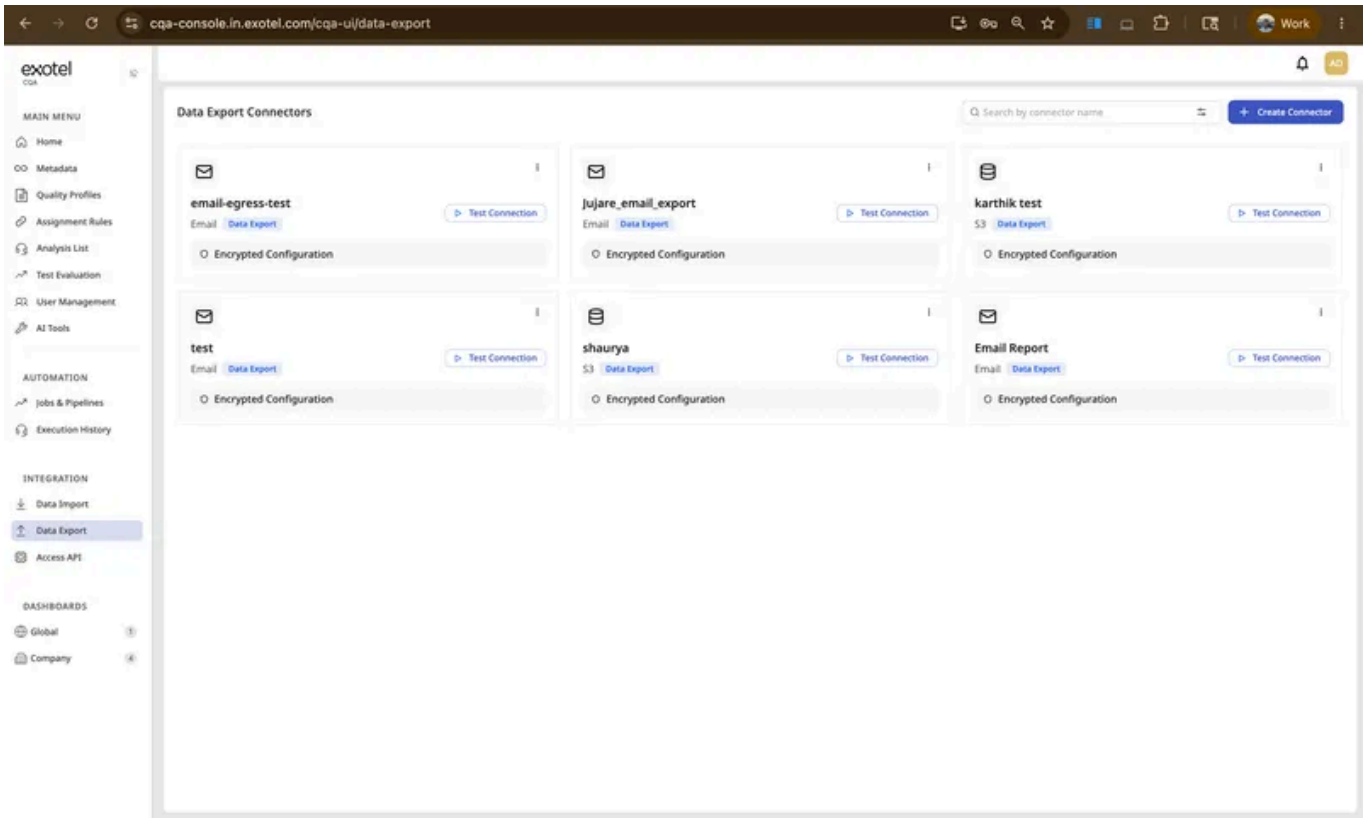
Credential types for SFTP:

- **Username/Password**: Standard credential-based authentication.
- **SSH Public Key**: CQA generates a public/private key pair from the backend. The public key is shared with the customer to add to their SFTP server's authorized keys. The UI for SSH public key setup does not exist yet – contact CQA Support to configure public key authentication for your connector.

Important: For Exotel product connectors (ECC 4X, ECC 6X, Exolite), the data import job is scheduled and starts running automatically when you create the connector. You do not need to manually create a job in Jobs & Pipelines for these connector types.

6.4.3. Data Export Connectors

Data export connectors define where CQA sends analysis results.



Supported connector types:

Connector Type	Description
SFTP	Push analysis reports to a customer-hosted SFTP server
Amazon S3	Push analysis reports to a customer-owned S3 bucket
Email	Send analysis reports to a configured email address

Creating a data export connector:

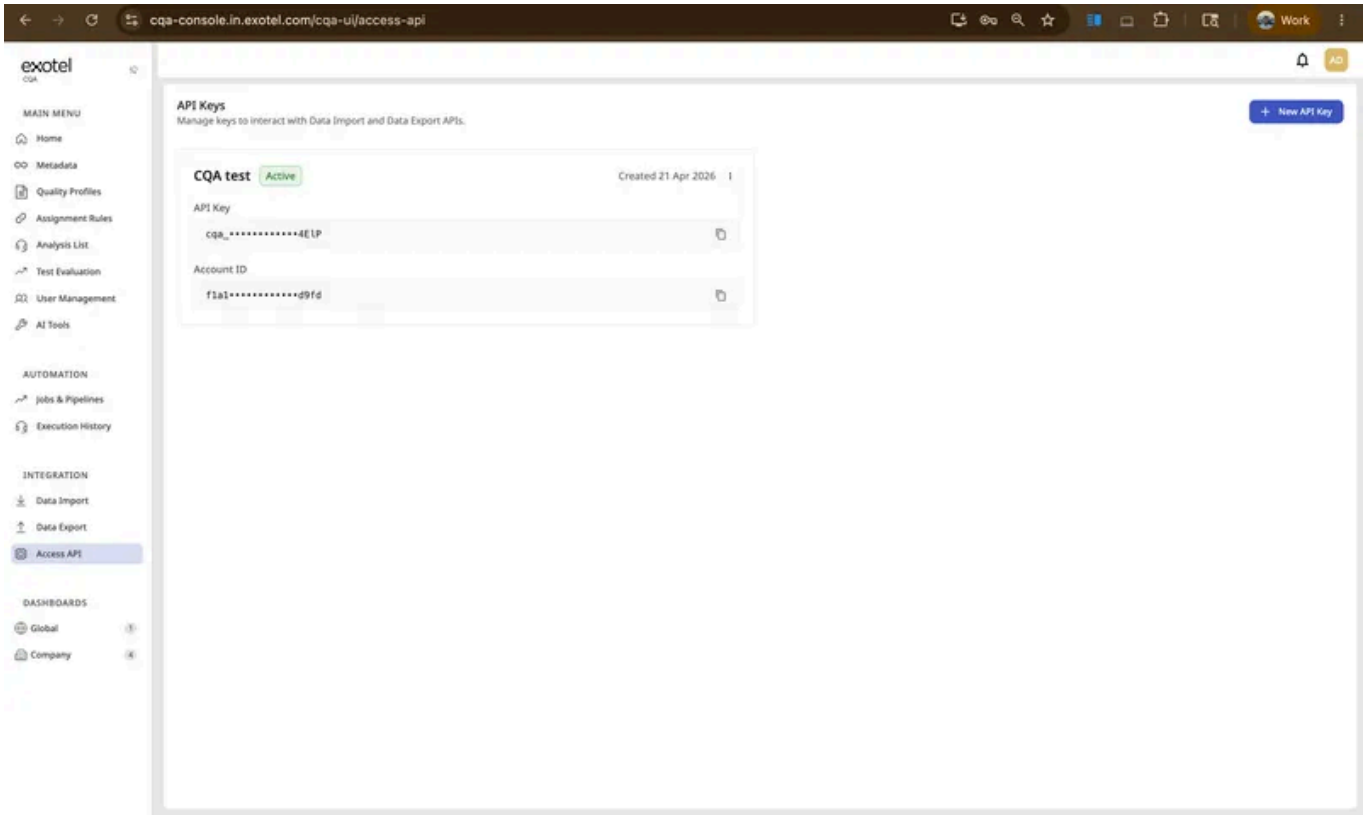
1. Navigate to **DATA INTEGRATION > Data Export** in the sidebar.
2. Click **+ New Connector**.
3. Enter a **Connector Name**.
4. Select the **Connector Type**.
5. Fill in the type-specific configuration fields:
    - **SFTP**: Host, Port, Username, Password, Credential Type, Remote Directory.
    - **Amazon S3**: Bucket Name, Region, Access Key, Secret Access Key, File Prefix.
    - **Email**: Destination email address.
6. Click **Save**.

Test Connection: After creating a connector, click **Test Connection** on the connector card to verify that the configured credentials and endpoint are valid before scheduling any jobs.

Email export behavior: When an email export job runs, the report is uploaded to Amazon S3 and a download link is sent to the configured email address. The report file (CSV or Excel) is **not** attached directly to the email – the email contains a link to download it. Each file is limited to **1,000 rows** – if a report exceeds this, multiple download links are included in the email.

6.4.4. API Access

Manage API keys for programmatic data ingestion and retrieval via the Standard API.



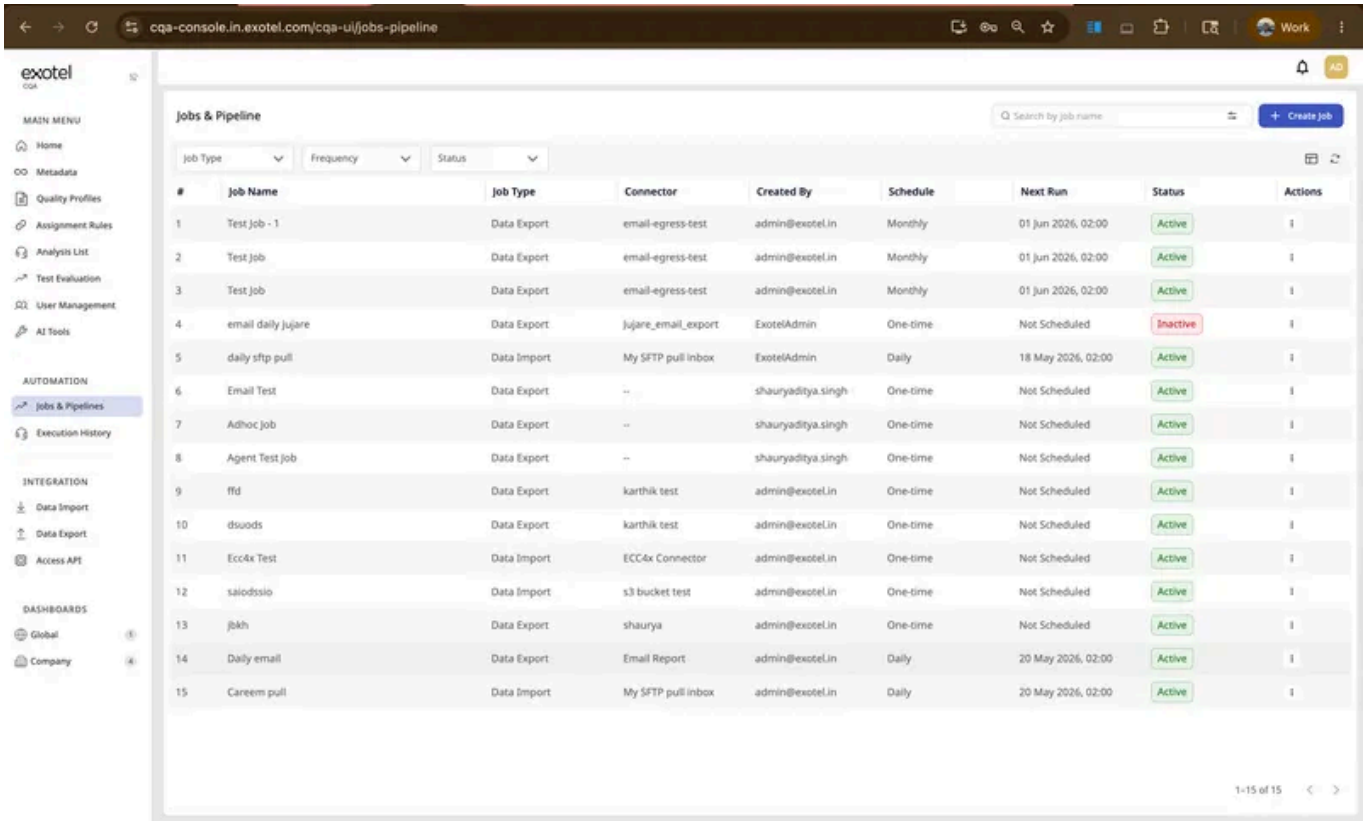
1. Navigate to **DATA INTEGRATION > API Access** in the sidebar.
2. View existing API keys. Each key shows its name, status (Active), created date, a masked API key, and a masked Account ID.
3. Click **Generate API Key** to create a new key.
    - Enter a **Key Name** and click **Generate API Key**.
    - The full API key is displayed **once**. Copy and store it securely – it cannot be retrieved again.
4. To revoke a key, click the **Revoke** button next to it.

Limits: A single tenant can have a maximum of **2 active API keys**. To create a new key when the limit is reached, revoke an existing key first.

When to use API keys: Use API keys when you want to programmatically ingest conversation data into CQA and retrieve analysis results via the Standard API, instead of using the connector-based UI workflow. Refer to the API Reference Guide for endpoint details.

6.4.5. Jobs & Pipelines

Jobs link connectors to schedules, automating recurring data imports and report exports.



Creating a job:

1. Navigate to **AUTOMATION > Jobs & Pipelines** in the sidebar.
2. View all jobs in a table showing: job name, job type (Data Import / Data Export), connector used, created by, schedule, and status.
3. Click **+ New Job**.
4. In the creation modal:
    - Enter a **Job Name**.
    - Select **Job Type**: Data Import or Data Export.

- Select the **Connector** to use (only connectors matching the selected job type are shown).
- Select **Frequency**: One-Time, Daily, Weekly, or Monthly.
- Set **Start Date** and **End Date** (or select Never End).
- For **Data Export (Report)** jobs only: configure the report parameters – Quality Profile, date range, saved filters, column selection (choose which fields to include), and file format (CSV or Excel).

5. Click **Create**.

Job actions:

- **Trigger**: Manually run a job immediately using the play button, regardless of its schedule. Useful when a scheduled pull missed the file (e.g., the CSV was uploaded after the scheduled time) and you want to retry immediately.
- **Disable**: Temporarily pause a scheduled job without deleting it (e.g., during maintenance windows).
- **Delete**: Permanently remove the job.

Schedule timing: Daily scheduled jobs trigger at approximately 2:30 AM IST. The job pulls all conversations and CSV files available at that time, runs analysis, and results appear in the Analysis List.

```
Note: For Exotel product connectors (ECC 4X, ECC 6X, Exolite), the data import job is scheduled and starts running automatically when you create the connector. It appears in the Jobs & Pipelines table, but you do not need to create or trigger it manually.
```

6.4.6. Execution History

Track all job runs with their outcomes.

1. Navigate to **AUTOMATION > Execution History** in the sidebar.
2. View a chronological table of all job executions showing: job name, job type, connector used, execution timestamp, and status.
3. Filter by job type (Data Import / Data Export) and status.

4. For **Data Export** executions: a download link for the generated report is available directly in the execution history. Links are valid for **7 days**.

Execution statuses:

Status	Description
Pending	Job is queued and waiting to start
Processing	Job is actively fetching and processing data from the source
Delivering	Processing is complete; for export jobs, results are being pushed to the destination (S3, SFTP, email). Import jobs pass through this state briefly before completing.
Success	Job completed successfully – all data was processed and delivered
Partial Success	Processing succeeded but some delivery destinations failed (e.g., SFTP delivery failed while S3 succeeded)
Handler Failed	The data processing step itself failed (e.g., source unreachable, file format error)
Delivery Failed	Processing succeeded but all delivery destinations failed

6.4.7. Exporting Reports from the Analysis List

In addition to creating export jobs from the Jobs & Pipelines page, users can also trigger report exports directly from the **Analysis List** page:

1. Navigate to the **Analysis List** and click **Export Report**.
2. The export configuration dialog is the same console used for creating export jobs.
3. An additional option is available: **Email Me** – this sends the report to the currently logged-in user's verified email address.

> **Note**: Agents and Supervisors can use the **Email Me** option to export reports to their own verified email address only. They cannot specify a different

destination email. This restriction ensures that analysis data is sent only to verified organizational email addresses.

1.6. API Reference Guide

Overview

Exotel CQA (Conversation Quality Analysis) provides AI-powered quality analysis for contact center interactions. The platform ingests interaction data -- audio recordings, transcripts, and metadata -- from any source, runs them through configurable quality profiles, and produces detailed quality scores.

This document covers the public API surface:

- **Data Import API** -- Push interactions into CQA via REST (single, batch, or file-based).
- **Analysis API** -- Retrieve detailed quality analysis results.
- **File Schemas** -- CSV format specifications for bulk ingestion.

Base URL

All endpoints are served under the CQA context path:

```
https://{host}/cqa
```

Replace {host} with the hostname of your CQA deployment (e.g. cqa.exotel.com).

Authentication

All Data Import and Analysis API endpoints authenticate via an API key passed in the X-API-Key header.

API Surface	Auth Method	Header
Data Import API	API Key	X-API-Key: {key}
Analysis API	API Key	X-API-Key: {key}

API Keys

API keys are scoped to a single account and are used for all programmatic ingestion and analysis retrieval. API keys can be created and managed through the CQA dashboard.

Rate Limits

API endpoints are rate-limited per tenant (account).

- Requests that exceed the limit receive 429 Too Many Requests with error code **RATE_LIMIT_EXCEEDED** (see Response Envelope).
- Too many **concurrent file jobs** is a separate 429 with code **TOO_MANY_JOBS**.

Endpoint Pattern	Method	Default tenant limit (typical)
/ingress/interactions* (ingest)	POST	100 requests per minute
/ingress/** (tracking)	GET	300 requests per minute

Response Envelope

All Data Import and Analysis API endpoints return responses in a common envelope.

Success response:

```
{
  "status": 200,
  "request_id": "d4f5a6b7-c8d9-4e0f-a1b2-c3d4e5f6a7b8",
  "data": { }
}
```

Error response:

```
{
  "status": 400,
  "request_id": "d4f5a6b7-c8d9-4e0f-a1b2-c3d4e5f6a7b8",
  "message": "Descriptive error message",
  "error": {
    "code": "VALIDATION_ERROR"
  }
}
```

Field	Type	Description
status	integer	HTTP status code mirrored in the body.
request_id	string	Unique request identifier for tracing and support.
message	string	Human-readable detail (present on many errors; may be omitted when redundant).
data	object	Response payload (present on success).
error	object	Present on failure. Contains **code** only.

Error Codes:

Code	HTTP Status	Description
VALIDATION_ERROR	400	Request failed validation (missing required fields, exceeded limits).
INVALID_JSON	400	Request body is not valid JSON.
INVALID_REQUEST	400	Request contains invalid arguments.
UNAUTHORIZED	401	Missing or invalid API key.
NOT_FOUND	404	The requested resource was not found.
DUPLICATE	409	Returned for single-ingest conflict responses (see Ingest a Single Interaction).
RATE_LIMIT_EXCEEDED	429	Tenant or user rate limit exceeded.
TOO_MANY_JOBS	429	Too many concurrent file ingestion jobs for this account.
INTERNAL_ERROR	500	An unexpected server error occurred.

Data Import API

The Data Import API is the primary external integration point for pushing interaction data into CQA. It supports three ingestion modes: single, batch, and file-based.

Base path: /api/v1/accounts/{account_id}/ingress
Auth: X-API-Key header

Ingest a Single Interaction

Submits one interaction for quality analysis. Returns immediately with a tracking ID.

POST

```
https://{host}/cqa/api/v1/accounts/{account_id}/ingress/interactions
```

Request Parameters (JSON Body)

Content requirement: At least one of audio_url, transcript_url must be provided.

Parameter Name	Mandatory / Optional	Type	Description
external_interaction_id	Mandatory	string	Your unique identifier for this interaction. Used for deduplication.
channel_type	Mandatory	string	Interaction channel. Recognized values: VOICE, CHAT, EMAIL, SMS, WHATSAPP. Other values are accepted (not rejected).
source	Optional	string	Identifies the originating system (e.g. my-pbx, genesys).
language	Optional	string	Language code (e.g. en, hi, es).
interaction_start_time	Optional	string (ISO-8601)	When the interaction started (e.g. 2026-04-01T10:30:00Z).
duration_seconds	Optional	integer	Duration of the interaction in seconds.
audio_format	Optional	string	Audio format hint (e.g. WAV, MP3, OGG).
callback_url	Optional	string	Webhook URL for status update notifications.
audio_url	Mandatory if transcript_url is not provided	string	Direct URL to the audio recording.
transcript_url	Mandatory if audio_url is not provided	string	Direct URL to the transcript file.
pii_redacted	Optional	boolean	Whether PII has already been redacted in the provided content. Default: false.
metadata	Optional	object	Arbitrary key-value pairs for tagging. Maximum 50 keys. Values can be strings, numbers, or booleans.

Example Request

```
curl -X POST
"https://{host}/cqa/api/v1/accounts/{account_id}/ingress/interactions" \
  -H "X-API-Key: {your_api_key}" \
  -H "Content-Type: application/json" \
  -d '{
    "external_interaction_id": "call-2026-04-01-001",
    "channel_type": "VOICE",
    "source": "my-pbx",
    "language": "en",
    "interaction_start_time": "2026-04-01T10:30:00Z",
    "duration_seconds": 300,
    "audio_format": "WAV",
    "audio_url": "https://storage.example.com/recordings/call-001.wav",
    "pii_redacted": false,
    "callback_url": "https://my-app.example.com/webhooks/cqa",
    "metadata": {
      "agent_id": "agent-42",
      "campaign": "retention-q2",
      "disposition": "RESOLVED"
    }
  }'
```

Response

201 Created -- Interaction queued successfully.

```
{
  "status": 201,
  "request_id": "req-abc-123",
  "message": "Queued for processing",
  "data": {
    "interaction_id": "550e8400-e29b-41d4-a716-446655440000",
    "external_interaction_id": "call-2026-04-01-001",
    "status": "queued"
  }
}
```

409 Conflict -- **Duplicate** external_interaction_id.

```
{
  "status": 409,
  "request_id": "req-abc-124",
  "message": "Duplicate: interaction with this external_interaction_id
already exists",
```

```
  "error": {
    "code": "DUPLICATE"
  }
}
```

400 Bad Request -- Validation error.

```
{
  "status": 400,
  "request_id": "req-abc-125",
  "message": "metadata must not exceed 50 keys",
  "error": {
    "code": "VALIDATION_ERROR"
  }
}
```

Response Fields

Parameter Name	Type	Description
interaction_id	string (UUID)	CQA-assigned unique identifier for the interaction.
external_interaction_id	string	Your identifier, echoed back.
status	string	queued on success.
message	string	Top-level hint on **201** (e.g. queued). On errors, the detail text is in message, not inside error.

Ingest a Batch of Interactions

Submits up to 100 interactions as a single asynchronous job. Returns an id in data for tracking.

POST

```
https://{host}/cqa/api/v1/accounts/{account_id}/ingress/interactions/batch
```

Request Parameters (JSON Body)

Parameter Name	Mandatory / Optional	Type	Description
interactions	Mandatory	array	List of interaction objects, each following the same schema as the single ingest endpoint. Minimum 1, maximum 100.

Response Fields

Parameter Name	Type	Description
id	string	Unique identifier for the batch job. Use this with the batch tracking endpoint.
type	string	Always batch for this endpoint.
status	string	pending -- the job has been accepted and is queued for processing.

Submit a File for Ingestion

Submits a remote CSV file URL for asynchronous ingestion. CQA downloads and processes the file in the background.

POST

```
https://{host}/cqa/api/v1/accounts/{account_id}/ingress/interactions/files
```

Request Parameters (JSON Body)

Parameter Name	Mandatory / Optional	Type	Description
file_url	Mandatory	string	URL to the file. Supported schemes: https://, http://, s3://. https is strongly recommended; http is accepted but offers no transport encryption. Private/local addresses (localhost, 127.0.0.1, 10.x, 192.168.x, 172.16.x) are rejected.
format	Mandatory	string	File format: csv or ndjson.
source	Optional	string	Default source applied to all rows where the row-level source is not set.
pii_redacted	Optional	boolean	Default PII flag applied to all rows.
callback_url	Optional	string	Default callback URL stored per row (same semantics as single ingest; no HTTP callback from ingress).
column_mapping	Optional	object	Maps your CSV headers to canonical column names. Keys are your original headers (trimmed, lowercased); values are canonical names. Ignored for NDJSON. See CSV Schema for canonical names.
metadata	Optional	object	Default metadata merged into every row. After merge, each row should respect the **50-key** metadata limit enforced for batch/single ingest; avoid large default maps that push merged rows over the limit.

File Processing Limits

Limit	Default Value
Max rows per file job	100,000
Max file size	100 MB

Get Interaction by ID

Retrieves the current status and details of an ingested interaction.

GET

```
https://{host}/cqa/api/v1/accounts/{account_id}/ingress/interactions/{interaction_identifier}
```

Path Parameters

Parameter Name	Mandatory / Optional	Description
account_id	Mandatory	Your CQA account ID.
interaction_identifier	Mandatory	Either the CQA-assigned UUID (interaction_id) or your external_interaction_id.

Response Fields

Parameter Name	Type	Description
interaction_id	string (UUID)	CQA-assigned unique identifier.
external_interaction_id	string	Your identifier.
batch_id	string	Job/batch ID if the interaction was part of a batch or file job. Omitted for single ingestion.
channel_type	string	Channel type as submitted.
source	string	Originating system.
status	string	Current status: queued, processing, completed, or failed.
status_modified_at	string (ISO-8601)	When the status last changed.
failure_reason	string	Reason for failure. Only present when status is failed; omitted otherwise.
audio_url	string	Resolved audio recording URL (same value as submitted audio_url / files audio URL).
transcript_url	string	Resolved transcript URL.
pii_redacted	boolean	Whether PII was flagged as redacted.
created_at	string (ISO-8601)	When the interaction was ingested.
metadata	object	Key-value metadata.
analyses	array	List of analyses triggered for this interaction. Each contains analysis_id, profile_id, and status.

Interaction Status Lifecycle

Applies to the status field on individual interactions and analyses.

API Status	Meaning
queued	Interaction accepted, waiting to be processed.
processing	Analysis is underway.
completed	All analyses finished successfully.
failed	Processing failed (check failure_reason).

Job Status Lifecycle

Applies to the status field in the batch/file 202 response and the job_status field in the batch tracking response. Job statuses are distinct from interaction statuses.

Job Status	Meaning
pending	Job accepted and queued. Returned in the initial 202 response.
processing	A worker has picked up the job and is processing rows.
completed	All rows have been processed (check accepted/rejected for counts).
failed	The job failed entirely (check error_message).

Track Batch / File Job

Retrieves all interactions for a batch or file job, with pagination and job-level status.

GET

```
https://{host}/cqa/api/v1/accounts/{account_id}/ingress/interactions/batch/{id}
```

Path Parameters

Parameter Name	Mandatory / Optional	Description
account_id	Mandatory	Your CQA account ID.
id	Mandatory	The job identifier: the **id** returned in the batch or file **202** response (data.id).

Query Parameters

Parameter Name	Default	Max	Description
page	0	--	Zero-based page index.
size	20	100	Number of interactions per page. Values above 100 are silently clamped to 100.

Response Fields

Parameter Name	Type	Description
id	string	The job identifier (same as data.id from the batch or file **202** response).
total	integer	Total interactions associated with this job.
interactions	array	Paginated list of interaction detail objects.
pagination	object	Contains page, size, total_elements, total_pages.
job_status	string	Overall job status: pending, processing, completed, or failed.
job_type	string	batch or file.
total_rows	integer	Total rows found in the input (includes accepted + rejected).
accepted	integer	Number of rows successfully processed.
rejected	integer	Number of rows that failed validation.
errors	array	Up to 100 error entries. Each has line (row number), reason, and external_interaction_id.
error_message	string	Top-level error message if the entire job failed.
completed_at	string (ISO-8601)	When the job finished processing.

Analysis API

Retrieve detailed quality analysis results for a completed analysis.

Base path: /api/v1/accounts/{account_id}/analyses
Auth: X-API-Key header

Get Analysis Detail

Returns the full scoring breakdown for a specific analysis, including categories, subcategories, and individual KPI scores.

GET

```
https://{host}/cqa/api/v1/accounts/{account_id}/analyses/{analysis_id}
```

Path Parameters

Parameter Name	Mandatory / Optional	Description
account_id	Mandatory	Your CQA account ID.
analysis_id	Mandatory	The analysis UUID (obtained from the interaction detail's analyses array).

Response Fields

Parameter Name	Type	Description
analysis_id	string (UUID)	Unique analysis identifier.
interaction_id	string (UUID)	The interaction this analysis belongs to.
external_interaction_id	string	Your interaction identifier.
profile_id	string	Quality profile used for scoring.
profile_name	string	Human-readable quality profile name.
status	string	queued, processing, completed, or failed.
ai_score	float	AI-generated quality score.
qa_score	float	Manual QA score (if a human reviewer overrode). Omitted if no manual review has occurred.
final_score	float	Effective score (QA score if present, otherwise AI score).
criticality_adjusted_score	float	Score after applying criticality weights.
max_score	float	Maximum possible score for this profile.
analysis_completed_at	string (ISO-8601)	Timestamp derived from the interaction's last status change in the account timezone (not a separate analysis-completion clock). May not equal a pure "analysis finished" instant in all edge cases.
failure_reason	string	Not populated in the current response (null omitted). Use status and support channels when an analysis fails.
categories	array	Scored categories. See Category object below.

Parameter Name	Type	Description
metadata	object	Interaction metadata, echoed for convenience.

Category Object

Field	Type	Description
name	string	Category name (e.g. "Communication Skills").
ai_score	float	AI score for the category.
qa_score	float	Manual QA score for the category. Omitted if not set.
final_score	float	Final score for the category.
criticality_adjusted_score	float	Criticality-adjusted score.
max_score	float	Maximum possible score.
sub_categories	array	Subcategories within this category.

SubCategory Object

Field	Type	Description
name	string	Subcategory name.
qa_score	float	Manual QA score for the subcategory. Omitted if not set.
kpis	array	Individual KPIs scored within this subcategory.

KPI Object

Field	Type	Description
kpi_name	string	KPI name (e.g. "Proper Greeting").
ai_response	string	The AI's answer (e.g. "Yes", "No", "Partially").
ai_justification	string	The AI's reasoning for its score.
ai_suggestion	string	Optional AI suggestion text. Omitted if not set.
ai_score	float	AI score for this KPI.
qa_score	float	Manual QA score for this KPI. Omitted if not set.
qa_justification	string	QA justification text. Omitted if not set.
qa_selected_kpi_option_uid	string	UID of the KPI option selected by QA, if any.
qa_selected_kpi_option_value	string	Label/value of the QA-selected KPI option.
user_comment	string	Free-text QA/user comment on this KPI.
final_score	float	Final score (may reflect QA override).
criticality_adjusted_score	float	Criticality-adjusted score.
max_score	float	Maximum possible score for this KPI.

File Schemas

When using the file-based ingestion endpoint (POST /interactions/files), CQA supports two file formats: CSV and NDJSON.

CSV Schema

The first row of a CSV file must contain column headers. Headers are trimmed and lowercased before matching against canonical names.

Canonical Column Names

Column	Required	Type	Description
external_interaction_id	Yes	string	Your unique interaction identifier.
channel_type	Yes	string	VOICE, CHAT, EMAIL, SMS, WHATSAPP.
source	No	string	Originating system identifier.
language	No	string	Language code (e.g. en).
interaction_start_time	No	ISO-8601 string	ISO-8601 UTC format (e.g. 2026-04-01T10:00:00Z).
duration_seconds	No	integer	Interaction duration in seconds.
audio_format	No	string	Format hint (e.g. WAV, MP3).
callback_url	No	string	Per-row callback URL (stored; no HTTP callback from ingress).
pii_redacted	No	boolean	true or false.
audio_url	Yes (Mandatory if transcript_url is not provided)	string	Audio file URL(s). Supports multiple URLs separated by ;.
transcript_url	Yes (Mandatory if audio_url is not provided)	string	Transcript file URL(s). Supports multiple URLs separated by ;.
file_url	No	string	Generic file URL. Used with file_type as a fallback when no audio_url/transcript_url entries exist.
file_type	No	string	File extension for type resolution. Audio extensions: mp3, wav, ogg, flac, m4a, aac, wma, amr. Transcript

Column	Required	Type	Description
			extensions: txt, pdf, doc, docx, srt, vtt.

Content requirement: Each row must have at least one of audio_url, transcript_url.

Extra Columns Become Metadata

Any column header that is **not** in the canonical set above is automatically added to the row's metadata map. For example, columns named agent, campaign, or disposition become metadata key-value pairs without any extra configuration.

Column Mapping

If your CSV uses non-standard headers, supply a column_mapping object in the file submission request to rename them. Keys are your original headers (trimmed, lowercased); values are canonical names.

Example -- given a CSV with headers call_id,type,recording,agent,campaign:

```
{
  "column_mapping": {
    "call_id": "external_interaction_id",
    "type": "channel_type",
    "recording": "audio_url"
  }
}
```

After mapping, agent and campaign are not canonical, so they automatically become metadata.

Example CSV

```
external_interaction_id,channel_type,audio_url,transcript_url,language,agent,
campaign
call-001,VOICE,https://s3.example.com/rec-001.wav,https://s3.example.com/tr-
001.txt,en,agent-42,retention
call-002,VOICE,https://s3.example.com/rec-002.wav,,hi,agent-15,support
call-003,CHAT,,,,agent-42,retention
```

```
Note: Row 3 (call-003) would fail validation because it has no content source
```

```
(no audio, transcript).
```

Request-Level Defaults for File Ingestion

For both CSV and NDJSON file submissions, fields set on the POST /interactions/files request body are applied as defaults to every row:

Request Field	Behavior
source	Applied to rows where the row-level source is null or empty.
pii_redacted	Applied to rows where the row-level value is null.
callback_url	Applied to rows where the row-level value is null.
metadata	Merged with each row's metadata. Row-level keys take precedence.

Webhooks / Callbacks

When a callback_url is provided (on the single ingest request, in the batch/file request, or per CSV row), CQA delivers HTTP POST notifications to that URL at key points in the interaction's or file job's lifecycle.

Delivery

- **Method**: HTTP POST
- **Content-Type**: application/json
- **Timeout**: 10 seconds (connect and read)
- **Feature flag**: Webhook delivery is controlled by the feature flag. If the flag is disabled for the tenant, callback_url values are stored but no HTTP requests are made.

Event Types

Event	Trigger
INTERACTION_INGESTED	Interaction has been accepted and persisted.
INTERACTION_ANALYSIS_IN_PROGRESS	Analysis has started for a quality profile.
INTERACTION_ANALYSIS_COMPLETED	A single analysis completed successfully. Payload includes scores and KPI results.
INTERACTION_ANALYSIS_FAILED	A single analysis failed. Payload includes error details.
INTERACTION_DISPUTE_RAISED	A QA dispute has been raised on an analysis.
INTERACTION_DISPUTE_RESOLVED	A QA dispute has been resolved.
FILE_INGESTION_COMPLETED	A file ingestion job has finished processing.

Payload Structure

Every callback POST body is a JSON object with these top-level fields:

Field	Type	Description
event	string	The event type (see table above).
deliveryId	string (UUID)	Unique identifier for this delivery attempt.
timestamp	string (ISO-8601)	When the callback was generated (e.g. 2026-04-01T10:35:42.123Z).
accountId	string	Your account identifier.
interactionId	string (UUID)	CQA's internal interaction identifier. Present for interaction-level events.
externalInteractionId	string	Your external_interaction_id. Present when available.
data	object	Event-specific data. Contents vary by event type (see below).

data by Event Type

INTERACTION_INGESTED


```
{
  "status": "INGESTED"
}
```


INTERACTION_ANALYSIS_IN_PROGRESS


```
{
  "analysisId": "a1b2c3d4-e5f6-7890-abcd-ef1234567890",
  "profileId": "prof-001",
  "profileName": "Inbound Support"
}
```


INTERACTION_ANALYSIS_COMPLETED


```
{
  "analysisId": "a1b2c3d4-e5f6-7890-abcd-ef1234567890",
  "status": "COMPLETED",
  "profileId": "prof-001",
  "aiScore": 85.0,
  "qaScore": null,
  "finalScore": 85.0,
  "criticalityAdjustedScore": 85.0,
  "analysisCompletedAt": "2026-04-01T10:35:42Z",
  "kpiResults": [
    {
      "kpiId": "kpi-101",
      "categoryId": "cat-01",
      "subCategoryId": "subcat-01",
      "aiResponse": "Yes",
      "aiJustification": "The agent greeted the customer by name.",
      "aiScore": 5.0,
      "qaScore": null,
      "finalScore": 5.0,
      "criticalityAdjustedScore": 5.0
    }
```

```
  ]
}
```

The kpiResults array is included when KPI-level results are available. Each entry contains the KPI identifier, its category/sub-category, the AI's response and justification, and individual scores.

INTERACTION_ANALYSIS_FAILED

```
{
  "errorCode": "ANALYSIS_FAILED",
  "errorMessage": "Transcript processing timed out"
}
```

INTERACTION_DISPUTE_RAISED

```
{
  "analysisId": "a1b2c3d4-e5f6-7890-abcd-ef1234567890",
  "disputeId": "d1e2f3a4-b5c6-7890-abcd-ef1234567890"
}
```

INTERACTION_DISPUTE_RESOLVED

```
{
  "analysisId": "a1b2c3d4-e5f6-7890-abcd-ef1234567890",
  "disputeId": "d1e2f3a4-b5c6-7890-abcd-ef1234567890",
  "resolution": "ACCEPTED",
  "updatedScore": 90.0
}
```

FILE_INGESTION_COMPLETED

```
{
  "fileJobId": "job-2026-04-01-001",
  "status": "FILE_INGESTION_COMPLETED",
  "totalRows": 500,
  "accepted": 498,
  "rejected": 2,
  "completedAt": "2026-04-01T11:05:00Z",
  "errors": [
    {
```

```
      "row": 42,
      "reason": "Missing required field: external_interaction_id"
    }
  ]
}
```


Full Example

A complete callback payload for a completed analysis:


```
{
  "event": "INTERACTION_ANALYSIS_COMPLETED",
  "deliveryId": "f47ac10b-58cc-4372-a567-0e02b2c3d479",
  "timestamp": "2026-04-01T10:35:42.123Z",
  "accountId": "e067e113f4",
  "interactionId": "550e8400-e29b-41d4-a716-446655440000",
  "externalInteractionId": "call-2026-04-01-001",
  "data": {
    "analysisId": "a1b2c3d4-e5f6-7890-abcd-ef1234567890",
    "status": "COMPLETED",
    "profileId": "prof-001",
    "aiScore": 85.0,
    "qaScore": null,
    "finalScore": 85.0,
    "criticalityAdjustedScore": 85.0,
    "analysisCompletedAt": "2026-04-01T10:35:42Z",
    "kpiResults": [
      {
        "kpiId": "kpi-101",
        "categoryId": "cat-01",
        "subCategoryId": "subcat-01",
        "aiResponse": "Yes",
        "aiJustification": "The agent greeted the customer by name.",
        "aiScore": 5.0,
        "qaScore": null,
        "finalScore": 5.0,
        "criticalityAdjustedScore": 5.0
```

```
    }
   ]
  }
}
```

Security -- HMAC Signature

Each callback request includes headers for verifying authenticity:

Header	Description
X-CQA-Signature	HMAC-SHA256 signature of the request body, formatted as sha256=<hex>.
X-CQA-Timestamp	ISO-8601 timestamp of when the request was sent (e.g. 2026-04-01T10:35:42.123Z).

To verify a callback:

1. Extract the hex digest from X-CQA-Signature (strip the sha256= prefix).
2. Compute HMAC-SHA256(secret, requestBody) using your API key secret as the signing key.
3. Compare the computed hex digest with the value from step 1.

The signing secret is derived from your active API key. It is shared during onboarding.

Retry Policy

If the callback endpoint returns a 5xx or 429 status code (or the request times out), CQA retries delivery. A total of **3 attempts** are made (1 initial + 2 retries):

Attempt	Delay before attempt
1st (initial)	Immediate
2nd (1st retry)	~10 seconds
3rd (2nd retry)	~30 seconds

After 3 failed attempts, the delivery is marked as FAILED.

Callbacks that receive 2xx or 4xx (other than 429) responses are **not** retried.

Limits and Constraints

Constraint	Value
Max interactions per batch	100
Max metadata keys per interaction	50 (enforced on single/batch request bodies; keep merged file-row metadata within this bound)
Max rows per file job	100,000
Max file size per file job	100 MB
Max concurrent file jobs per account	5 (default)
Batch tracking page size (max)	100 (silently clamped)
Supported file formats	csv, ndjson
Supported file URL schemes	https, http, s3 (https recommended)
Supported channel types	VOICE, CHAT, EMAIL, SMS, WHATSAPP

1.7. Troubleshooting Guide

Target Audience:

All Users

Description:

A self-help repository mapping common errors or confusions directly to their solutions.

7. Troubleshooting

This guide addresses common issues users may encounter while navigating the CQA platform, configuring settings, or analyzing data.

7.1. Login & Access Issues

Problem: I cannot log in to the platform.

- **Possible Cause:** In the C3 version, the login flow requires a unique **Tenant ID** in addition to your username and password.
- **Solution:** Ensure you are entering the correct **Tenant Name/ID** provided by your administrator before entering your credentials.

Problem: I clicked the "Accept Invitation" link in my welcome email, but the page says the link is invalid or expired.

- **Possible Cause:** Invitation links sent by the system are strictly valid for **72 hours** to ensure secure onboarding.
- **Solution:** Contact your CQA Administrator and request them to navigate to the User Management dashboard to resend a fresh invitation to your email address.

7.2. Dashboard & Data Visibility

Problem: The Analytics Dashboard shows "No Data."

- **Possible Cause 1 (Filters):** Your current filter selection (Date, Agent, or Quality Profile) may be too restrictive.

    - *Solution:* Reset filters or expand the **Date Range** to include a wider period.
- **Possible Cause 2 (Access Control):** Your user account may be restricted to specific metadata (e.g., a specific Region or Campaign).
    - *Solution:* You will only see data relevant to your assigned access rights. Contact your admin to verify your metadata permissions.

Problem: I cannot find a specific Metadata field in the filter dropdowns.

- **Possible Cause:** The field exists but has not been enabled for filtering by the Admin.
- **Solution:** An Admin must navigate to the **Metadata** page and check the **"Filter Option?"** box for that specific field .

7.3. Analysis & Automation

Problem: Incoming calls are not being analyzed automatically.

- **Possible Cause:** The call's metadata does not match any active **Assignment Rule**.
- **Solution:**
    1. Navigate to **Assignment Rules**.
    2. Check the logic conditions (e.g., "Queue Name IS Support").
    3. Verify that the incoming call actually contains that specific metadata tag. If the metadata doesn't match exactly, the system will skip analysis .

Problem: A Test Evaluation shows a status of "Partial Success" or "Failed."

- **Possible Cause:** Some rows in your uploaded file may contain invalid audio URLs or missing mandatory data.
- **Solution:**
    1. Open the specific Test Evaluation from the list.
    2. The system displays a count of successful vs. failed items.
    3. Filter the list to identify which specific recordings failed and verify their URLs in your source file.

7.4. Disputes & Scoring

Problem: I cannot change a score while resolving a dispute.

- **Possible Cause:** The scorecard is in "View" mode.
- **Solution:** You must click the **Edit** button on the Interaction Evaluation page to enable score modification and dispute resolution.

Problem: A "Critical" KPI failed, but other scores are still high.

- **Possible Cause:** The criticality logic depends on the level set (Category vs. Profile).
- **Solution:** Check the **Quality Profile** configuration.
    - If Criticality is set to **"Category,"** only that specific category's score becomes 0.
    - If set to **"Profile,"** the entire call score becomes 0.

7.5. Language & Transcript Issues

Problem: I do not see a language toggle on the Interaction Details page.

- **Possible Cause 1 (Not Enabled)**: Native Language Support has not been enabled for your tenant. This feature available for high-tier plans.
- **Solution**: Contact your Administrator to coordinate with the Exotel Delivery team for activation. Note that this feature is available on higher-tier plans only.
- **Possible Cause 2 (Older Interaction)**: The interaction was processed before Native Language Support was enabled for your tenant.
- **Solution**: Only interactions analyzed **after** enablement will have dual-language transcripts. Previously processed interactions will only display the English transcript.

Problem: The detected language on the toggle does not match the actual spoken language.

- **Possible Cause**: The language detection model identifies the **dominant language** in the audio. If the conversation contains significant code-switching (mixing multiple languages, e.g., Hindi and English), the system may default to the most prevalent language.
- **Solution**: This is expected behavior for heavily mixed-language conversations. If the detected language is consistently incorrect for single-language calls, report the issue to CQA Support with the Interaction ID for investigation.

7.6 AI Suggestions

Problem: I do not see 'AI Suggestion' for a failed KPI.

- **Possible Cause 1 (Not Enabled)**: AI Suggestions Support has not been enabled for your tenant. This feature available for high-tier plans.
- **Solution**: Contact your Administrator to coordinate with the Exotel Delivery team for activation. Note that this feature is available on higher-tier plans only.
- **Possible Cause 2 (Older Interaction)**: The interaction was processed before AI Suggestions Support was enabled for your tenant.
- **Solution**: Only interactions analyzed **after** enablement will have AI Suggestions.
- **Possible Cause 3 (KPI Type)**: The KPI is a "Text" type (data extraction). AI Suggestions are only generated for scoring KPIs (Binary, Selection, Rating). Text-type KPIs do not receive suggestions.
- **Solution**: Create KPIs other than "Text" type for the ones you need AI Suggestions to be enabled
- **Possible Cause 4 (KPI Score)**: Suggestions only appear when the awarded score is less than the maximum. If the KPI received full marks, no suggestion is generated.
- **Solution**: Ensure you only look at KPIs that are scored less than the max score.

Problem: AI Suggestion seems inaccurate or irrelevant

Possible Cause	Solution
No Reference Document (SOP) was uploaded	Without an SOP, the system generates generic best-practice tips. Upload a comprehensive Reference Document to your Quality Profile for SOP-specific suggestions.
The Reference Document is outdated or incomplete	Update your Reference Document with current, detailed procedures. The more specific your SOP, the better the suggestions.
Genuine inaccuracy	Use the thumbs-down button, this feedback helps improve the AI Suggestions.

7.7. Report Scheduling

Problem	Possible Cause	Solution
Schedule was created but no report was received	The start date is in the future	Check that the start date has passed. Review execution history for error details.
Report contains no data / empty report	No analyses matched the Quality Profile within the reporting window	Confirm that the selected Quality Profile has completed analyses in the expected date range.
Schedule stopped running after a certain date	The schedule's end date has passed	Check the schedule's end date configuration. If the end date has passed, create a new schedule with the correct end date.

7.8. PII Redaction

Problem: I see raw PII (phone numbers, names, etc.) in transcripts even though PII redaction should be active.

- **Possible Cause 1**: PII redaction has not been enabled for your tenant.
  - **Solution**: Contact your Customer Success Manager to verify that PII redaction is active for your tenant.
- **Possible Cause 2**: The interaction was processed before PII redaction was enabled.
  - **Solution**: PII redaction applies only to newly processed interactions. Previously analyzed interactions retain their original content.
- **Possible Cause 3**: The specific PII category (e.g., Person Name) is not enabled in your tenant's configuration.
  - **Solution**: Contact your Customer Success Manager to verify which PII categories are active and request adjustments if needed.
- **Possible Cause 4**: PII detection did not identify the sensitive data in the conversation.
  - **Solution**: PII redaction relies on automated detection, which may occasionally miss instances – particularly with unusual formats, code-switched languages, or ambiguous context. If you notice unredacted PII that should have been caught, report the Interaction ID to CQA Support.

Problem: PII appears redacted in the transcript but shows in the downloaded report.

- **Possible Cause**: This is not expected behavior. All surfaces should show consistent redaction.
- **Solution**: Report this issue to CQA Support with the Interaction ID and the specific field where the discrepancy appears.

2. Policies

2.1. Password Policy

1. Purpose

The CQA Password Policy defines the standards for creating, managing, and securing user passwords. This policy is designed to mitigate the risk of unauthorized access, brute-force attacks, and credential stuffing while maintaining a user-friendly experience that aligns with modern security standards (including NIST 800-63B guidelines).

2. Scope

This policy applies to all accounts accessing the CQA platform, including Tenant Administrators, Supervisors, Agents, and API system accounts.

3. Password Construction Requirements

All user-generated passwords must adhere to the following mandatory criteria:

3.1. Length Requirements

- **Minimum Length:** 12 characters.
- **Maximum Length:** 128 characters.
- *Rationale:* Longer passwords provide exponentially greater resistance against brute-force and dictionary attacks. Allowing up to 128 characters easily accommodates passphrases.

3.2. Character Complexity

Passwords must contain characters from at least **three (3) of the following four (4) categories**:

1. Uppercase alphabetical characters (A-Z)
2. Lowercase alphabetical characters (a-z)
3. Numeric characters (0-9)
4. Special characters and symbols (e.g., ! @ # $ % ^ & * ( ) - _ = + [ ] { } ; : , . < > / ?)

3.3. Allowed Characters

- The system supports **all UTF-8 characters**.
- Users are explicitly permitted to use spaces (allowing for multi-word passphrases) and all standard ASCII and non-ASCII symbols.

3.4. Contextual Restrictions

- **Username/Email Match:** Passwords are cross-checked against the user's account data. A password will be immediately rejected if it contains the user's username, first name, last name, or email address (evaluated as a case-insensitive substring match).

Security Parameter	Requirement	Description / Rule
Minimum Length	12 Characters	Passwords must be at least 12 characters long.
Maximum Length	128 Characters	Passwords can be up to 128 characters to easily accommodate long passphrases.
Complexity Requirements	3 out of 4 Categories	Passwords must contain characters from at least 3 of the following 4 categories: • Uppercase letters (A-Z) • Lowercase letters (a-z) • Numbers (0-9) • Special characters/symbols (e.g., !@#$%^&*)
Allowed Characters	All UTF-8 Characters	All standard characters, symbols, and spaces are explicitly allowed and encouraged.
Contextual Restrictions	No Username/Email	Passwords cannot contain the user's account username, first name, last name, or email address (case-insensitive).
Usability & Tools	Paste Functionality Enabled	The system fully supports copy/pasting.