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Conversational Intelligence

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CONTENTS

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 .
- **AI Context**: Selected metadata fields can be injected to the AI during analysis so scoring and insights use operational context (e.g., campaign or disposition) in addition to the transcript/audio.

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.

1.2. Getting Started & Navigation

3. Getting Started

Target Audience:

All Users

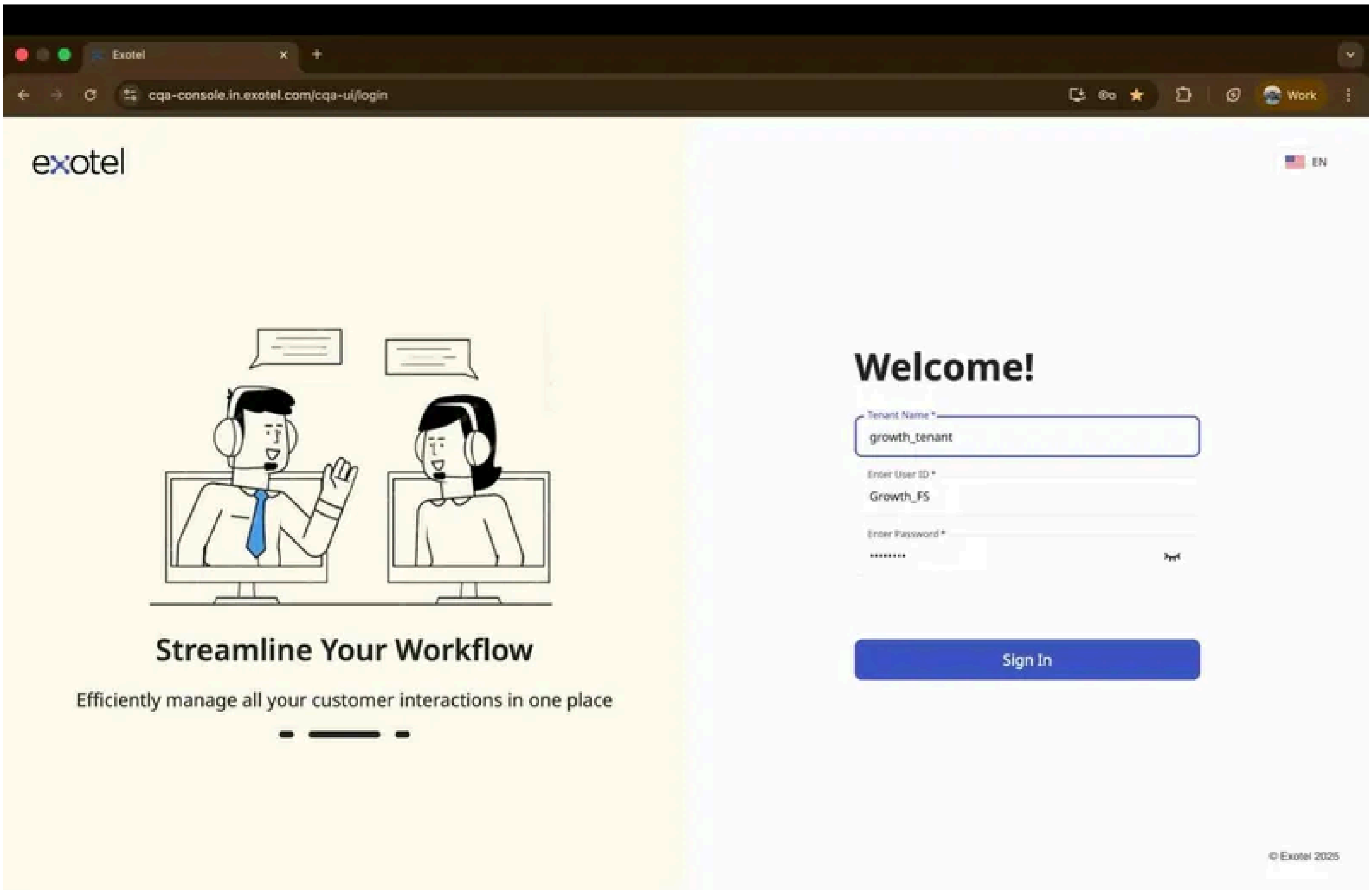
Description:

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

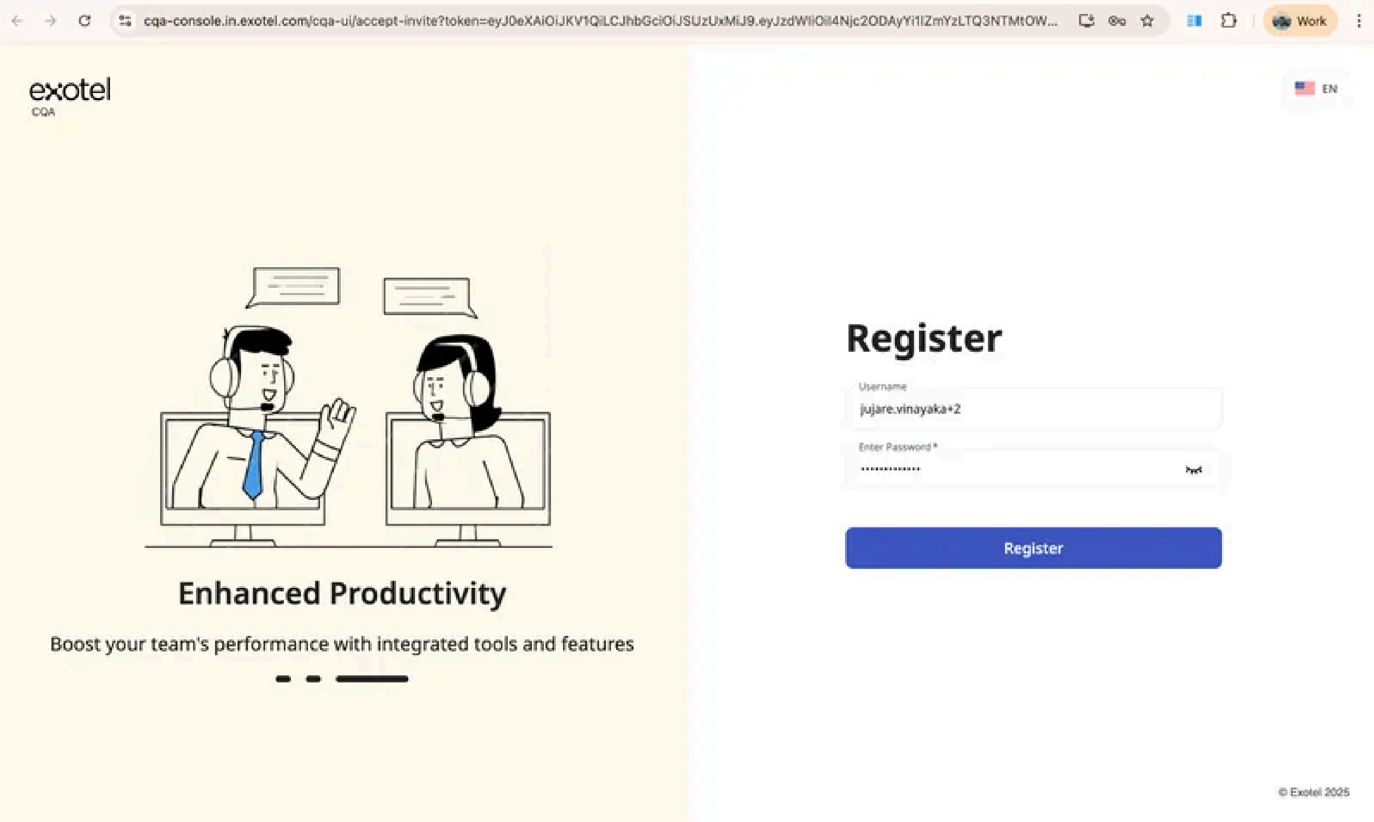
To access the CQA console, you will need your organization's unique Tenant ID and user credentials.



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)

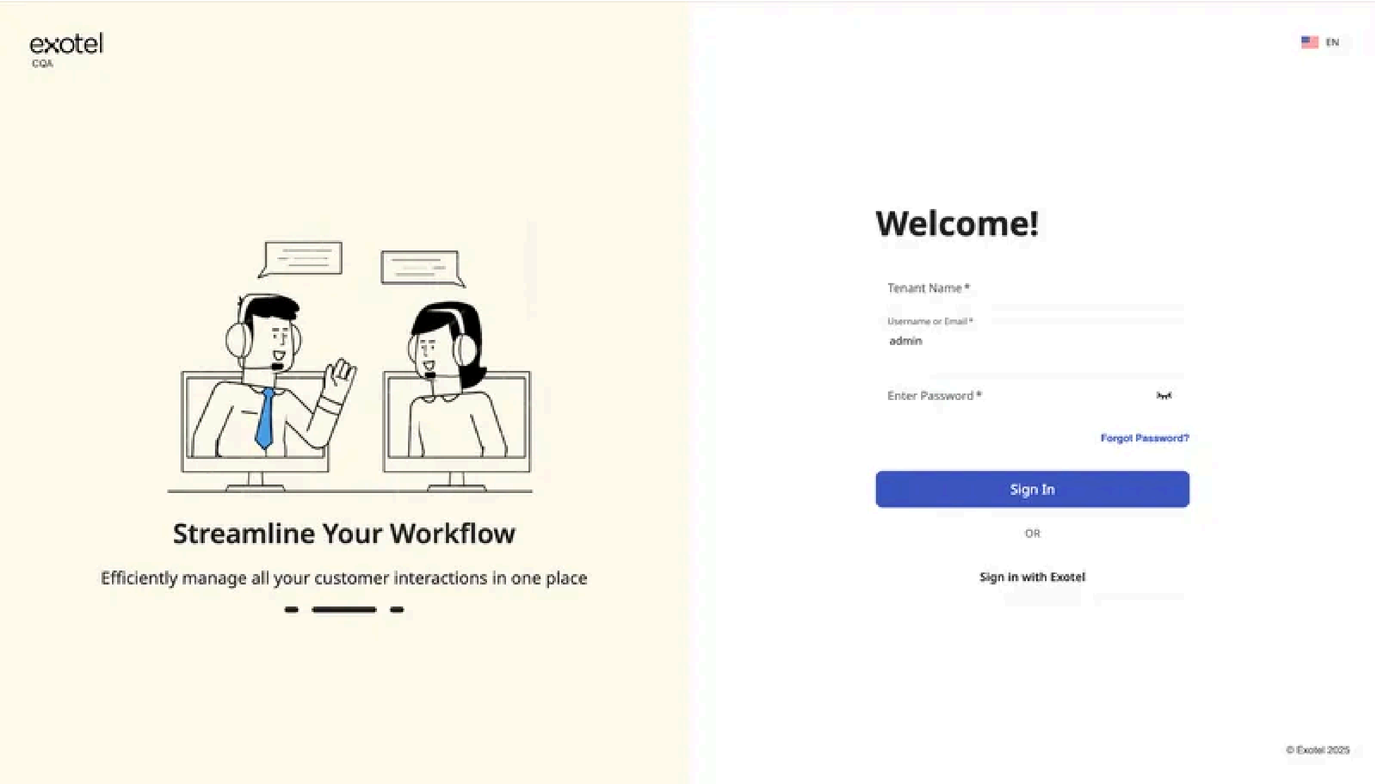
If your Administrator has invited you to join the CQA platform, you must complete your registration via email before accessing the console.



- **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.

3.1.3 Forgot Password

Goal: Reset your CQA password yourself from the login page – without waiting for an administrator to intervene. This flow also re-enables accounts that were locked after too many failed login attempts.




```
When this applies: Use Forgot Password when you sign in with Tenant ID, username, and password on the CQA login page (for example ECC backend integration, CQA standalone, or Platform without IAMIX/SSO). If your organization uses SSO / IAMIX or you are auto-logged in from ECC frontend integration, use your organization's identity provider instead.
```

How it Works:

1. You request a reset from the login page.
2. CQA emails a one-time reset link to the address on your user account.
3. You set a new password that meets the **password policy**, then are signed in automatically.

Steps:

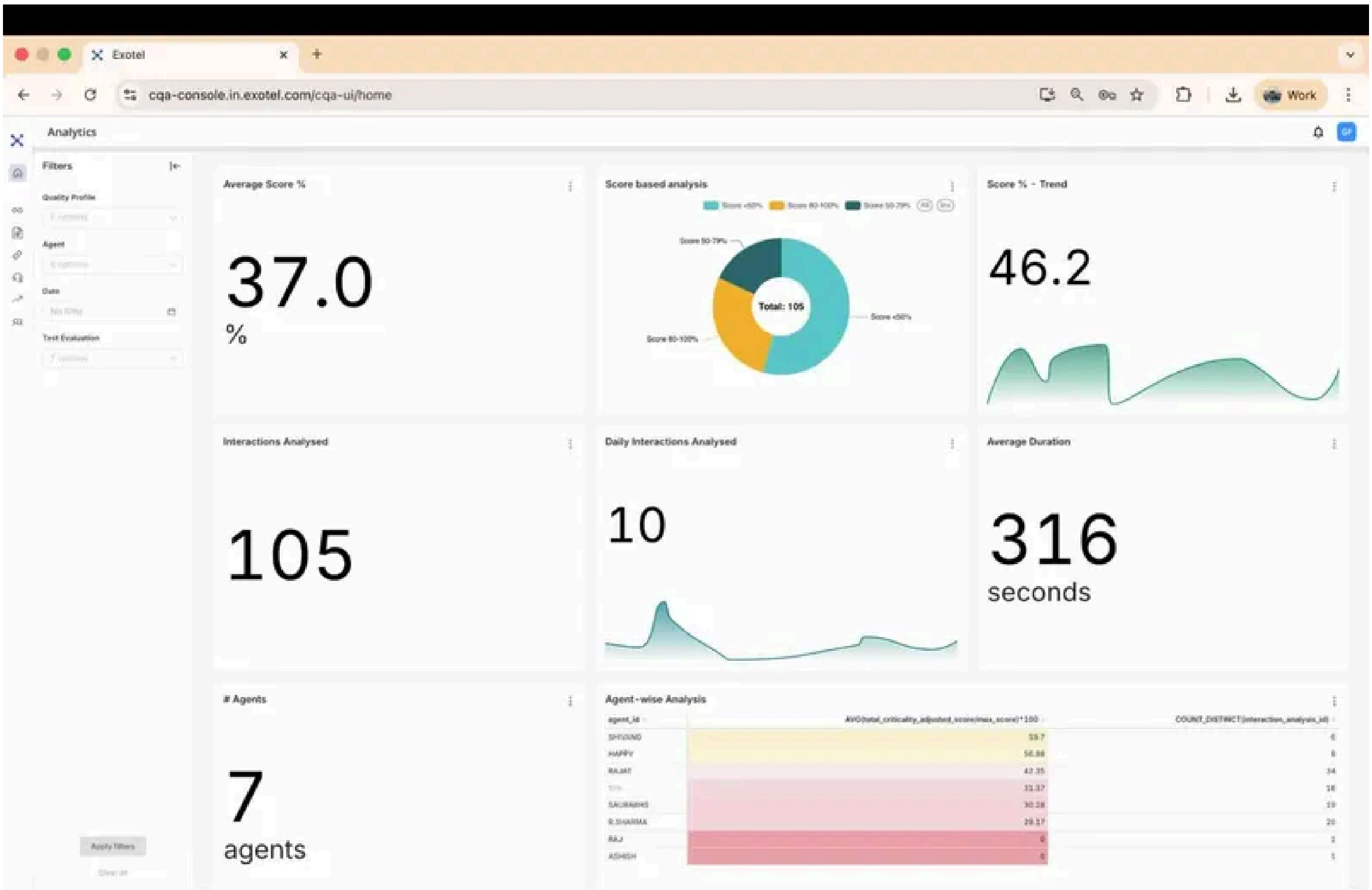
1. On the CQA login page, click **Forgot Password?**
2. Enter the email address associated with your CQA user account and submit the request.
3. Check your inbox for the password-reset email. Open the link and set a new password (and confirm it).
4. After a successful reset, you are logged in directly.

Notes:

- Reset links expire after **30 minutes**. If the link is expired or already used, request a new one from the login page.
- New passwords must follow the **password policy** (minimum length and character rules; password must not contain your username or email). The form shows specific feedback if a rule is not met.
- If you do not receive an email, wait a few minutes and try again later. Repeated requests in a short window may be rate-limited.
- Completing Forgot Password also unlocks an account that was locked due to failed login attempts.

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.
  - **AI Insights** (available **on request** – contact your CSM to enable):
    - **Agent Summary**: Org / Team / Agent coaching views under AI Insights.
    - **QP Insights**: Portfolio-wide and per-profile Quality Profile health.
  - **Integrations** (available **on request** – contact your CSM to enable): Under **REST APIs**, register systems of record for **Second-Order KPI Scoring**, then bind them on Quality Profile KPIs via **Use Tool**.
  - **Report History**: View the history of reports exported.
  - **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

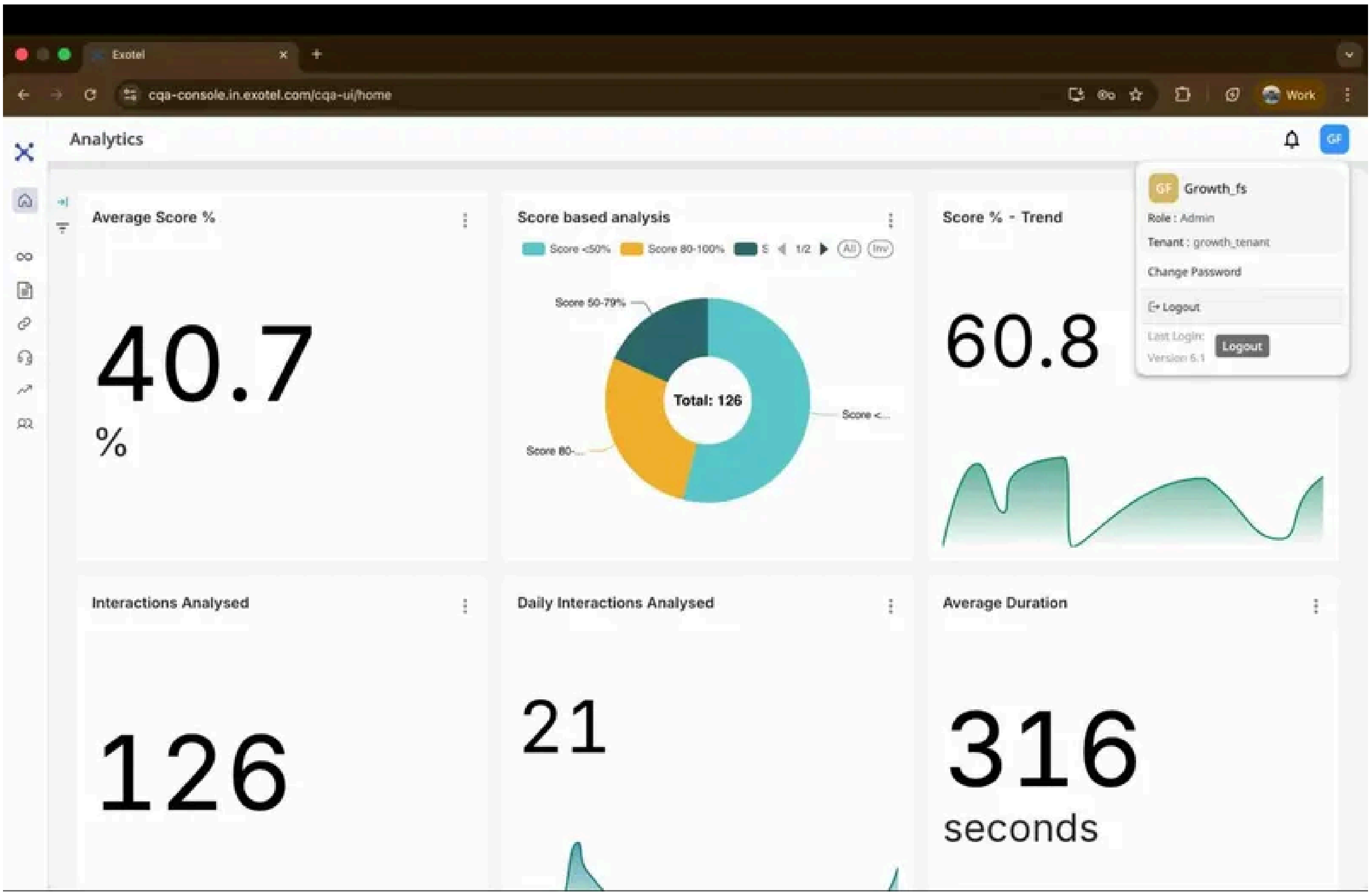
Tenant-Specific Analytics & Custom Dashboards: The CQA analytics engine (powered by Superset) utilizes a strictly isolated, tenant-specific architecture. This means your data visualizations are walled off and secure.

- **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:

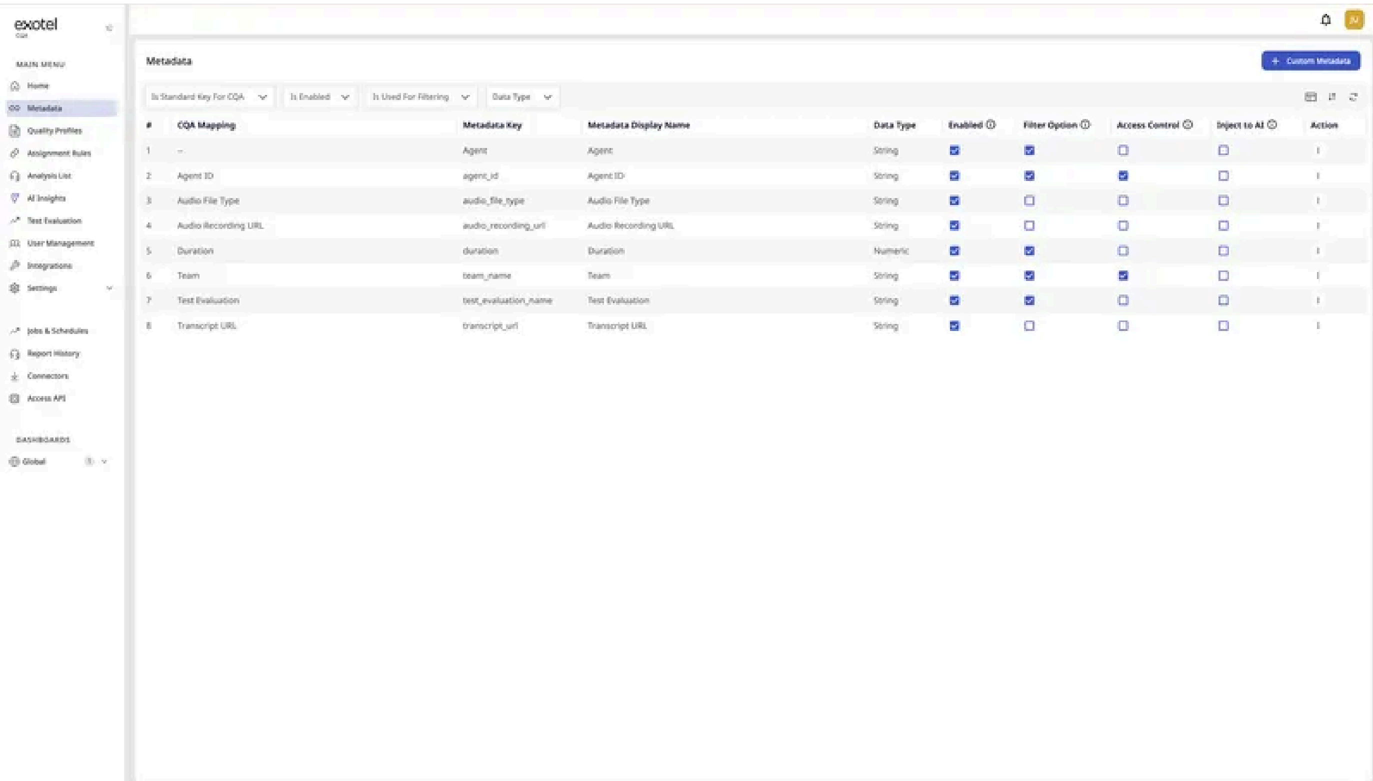
The core setup guide. This page holds all the foundational tasks required to make the CQA platform operational before daily QA work begins.

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" .
- **Inject to AI**: Check the "**Inject to AI**" box.
  - *Effect*: CQA includes this field's value as additional context for the AI when analyzing the call/transcript. Metadata from all ingestion sources (ECC, Platform, S3, SFTP, Excel, Ingress API) can be injected. Up to 20 fields per tenant may have Inject to AI enabled; values longer than 20 characters are truncated for AI context.

  Note: Inject to AI is not available on the Metadata page by default. Contact your CSM to enable this capability for your tenant before the option can be used.

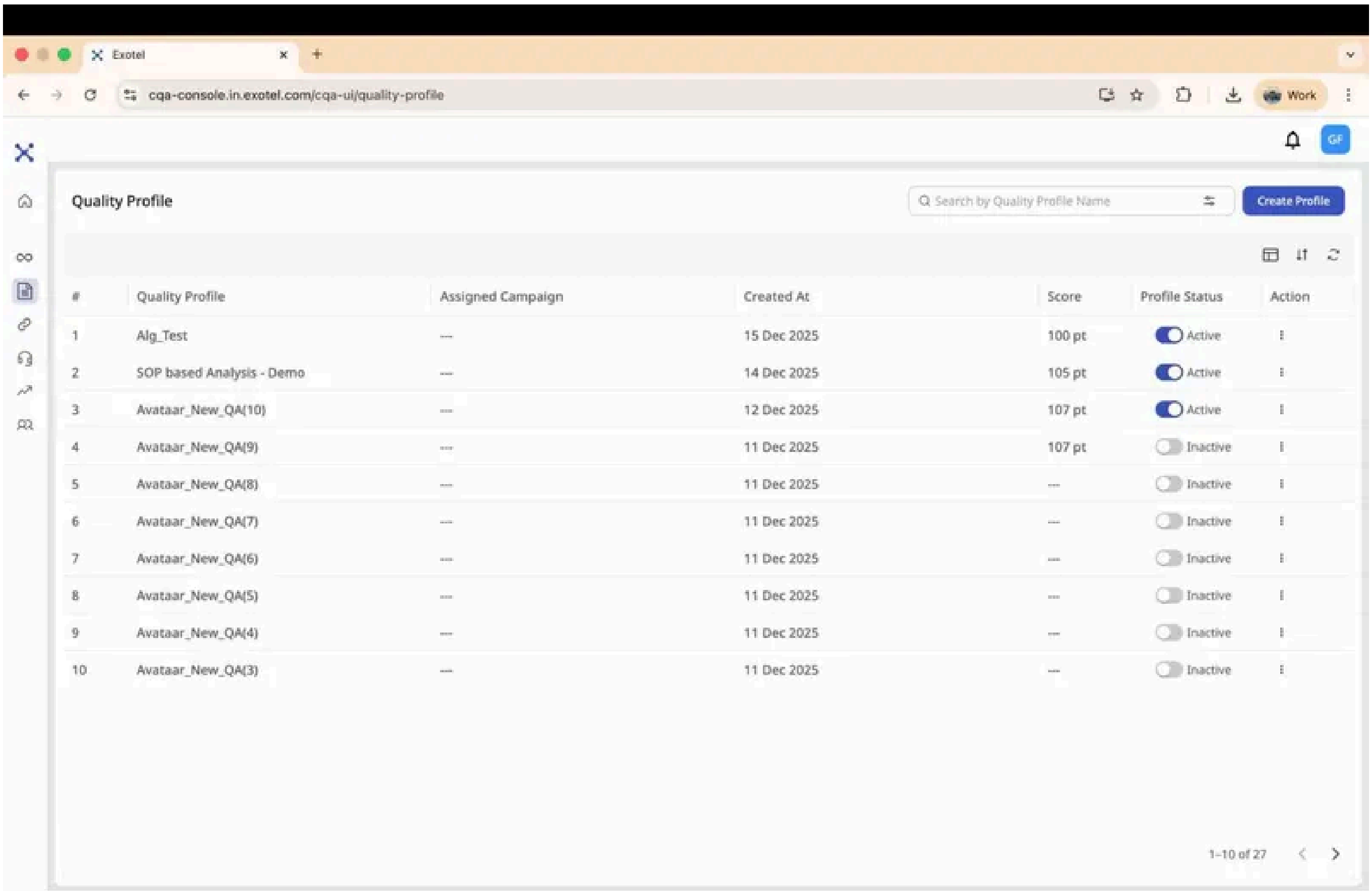
4.1.3. CQA Mapping (Renaming Fields)

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)

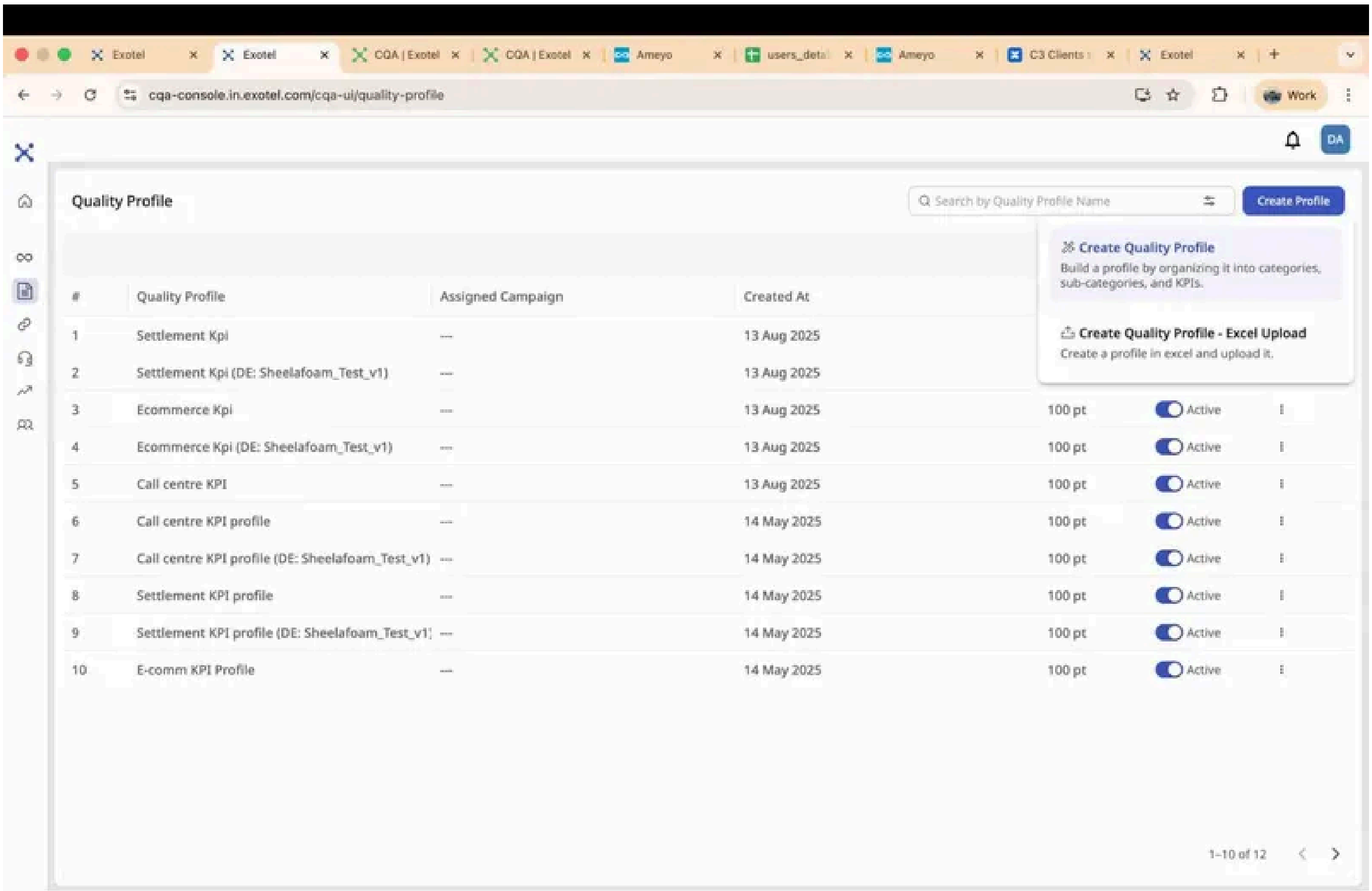
Goal: Create the structured rubric used to evaluate agent performance. A Quality Profile represents a specific scorecard (e.g., "Sales Audit" or "Customer Service Review").



There are three ways to build a profile: **Manually** (good for small edits or simple profiles) or via **Excel Upload** (recommended for bulk creation), or using **AI-Assisted Creation** (recommended when starting from scratch – the AI generates a complete profile from your business context and sample calls).

4.2.1. Method A: Manual Creation

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



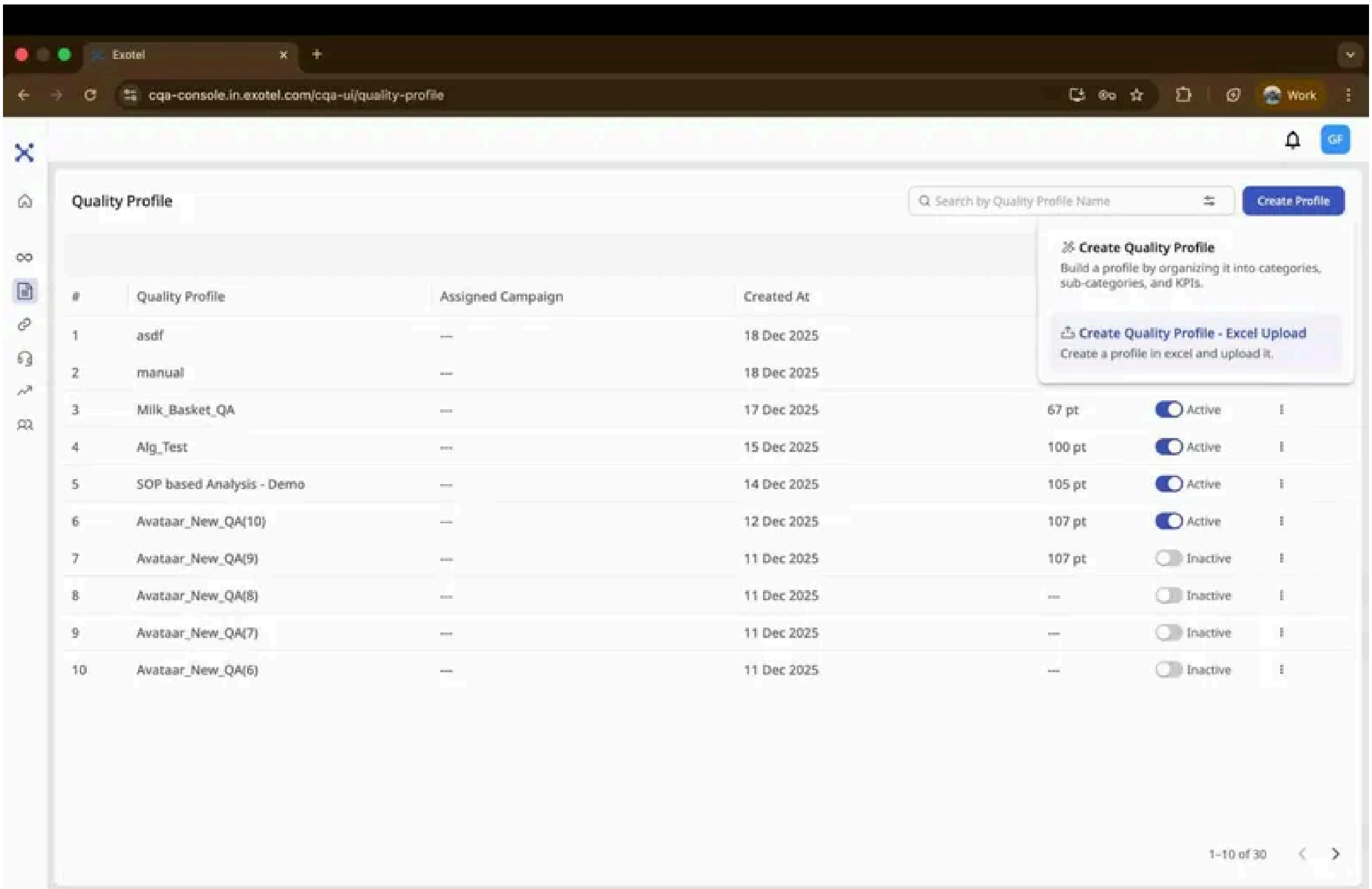
1. Navigate to **Quality Profiles** and click **Create Profile**, and click **Create Quality Profile**.
2. **Profile Details:** Enter a Name (e.g., "Inbound Support") and a Description.
3. **Topics** (optional, used by Smarter Assignment):
   - Topics power topic-based matching when you use **Smart Assignment** in Assignment Rules.
   - Add up to **10** selection topics that describe when this profile should apply (e.g., "Insurance Enquiry", "EMI Collection").
   - Type a topic and press **Enter** to add it.
   - Use **Generate Topics** for AI suggestions based on the profile name and description, then click a suggestion to add it.
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.

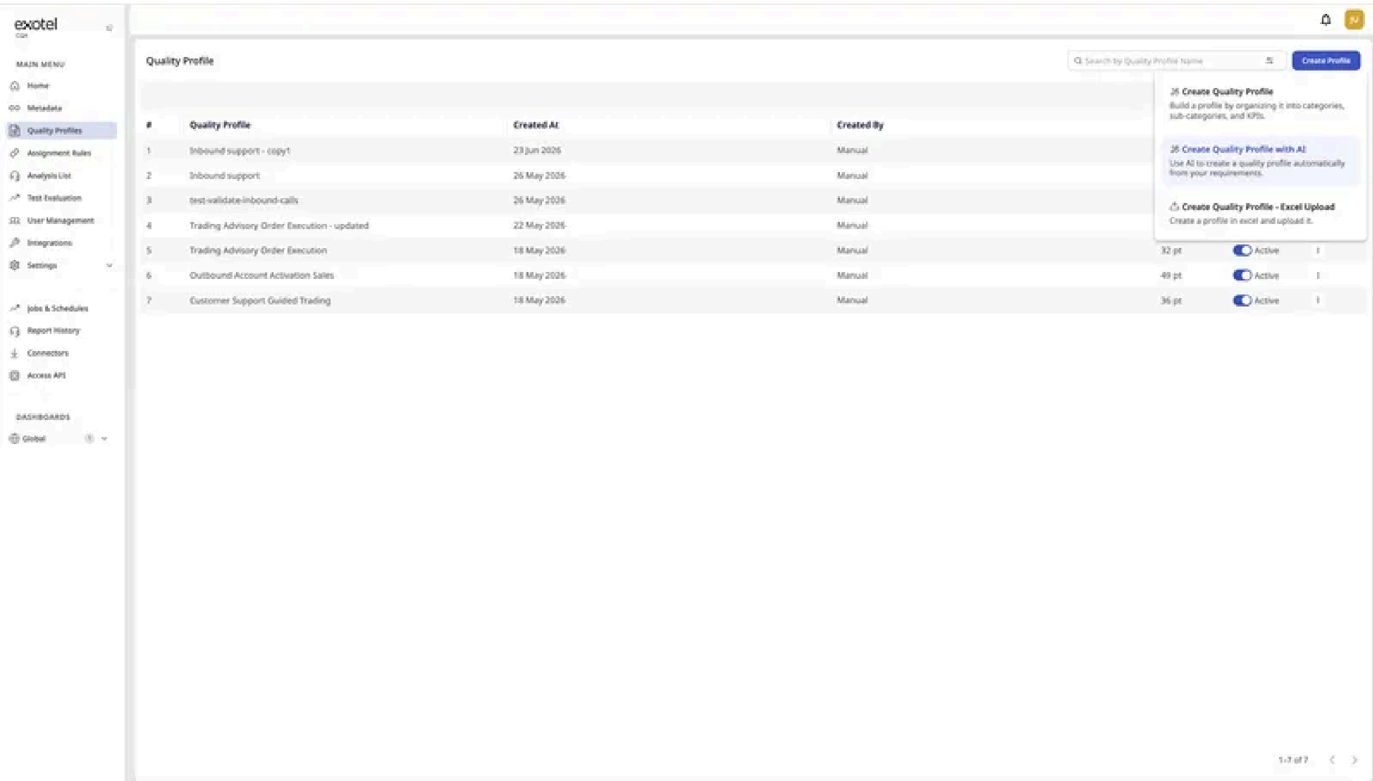
3. Upload and Validate

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. Method C: AI-Assisted Creation

Use this method when starting from scratch and you want the AI to generate a complete Quality Profile based on your business context and real call data. Instead of manually defining every KPI, you walk through a guided wizard that collects your requirements and sample interactions, then the AI produces a structured scorecard – categories, sub-categories, and KPIs – ready for review and activation.

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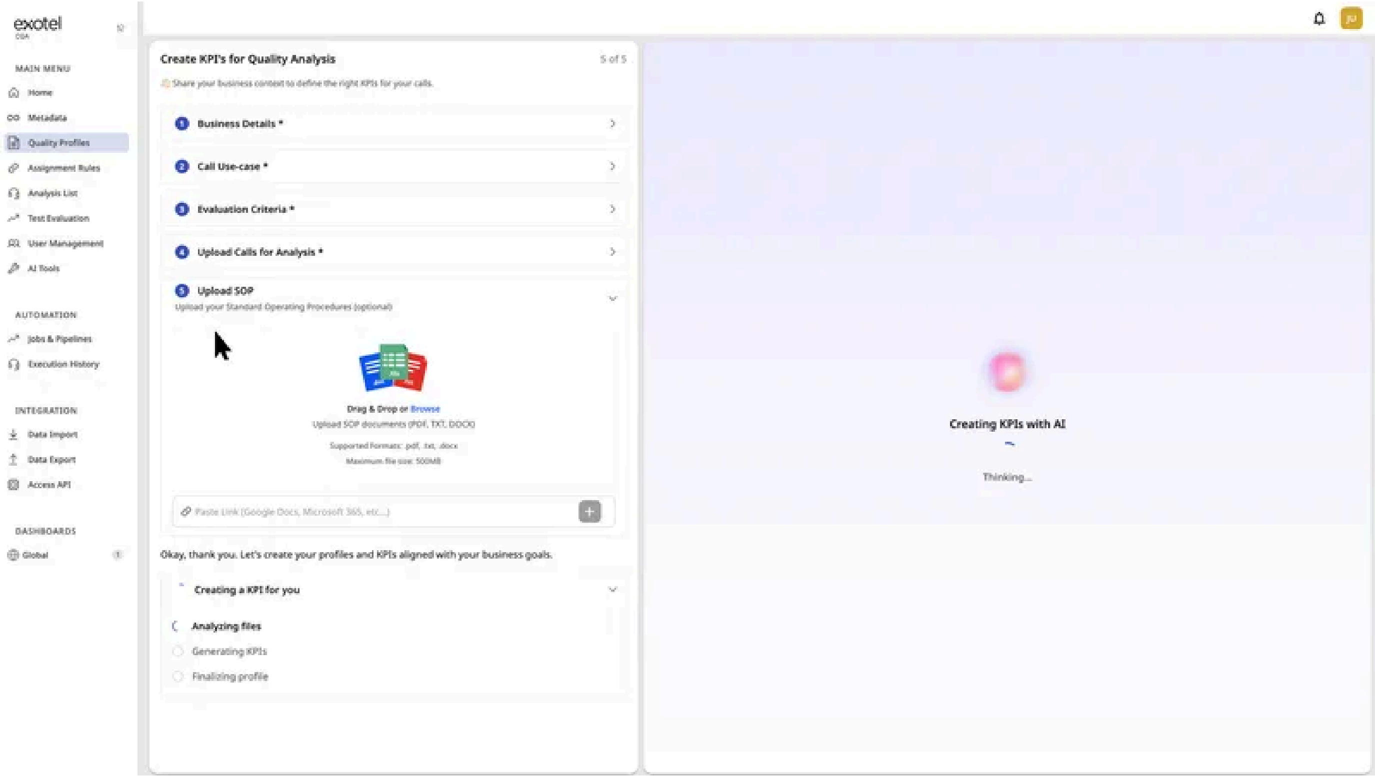
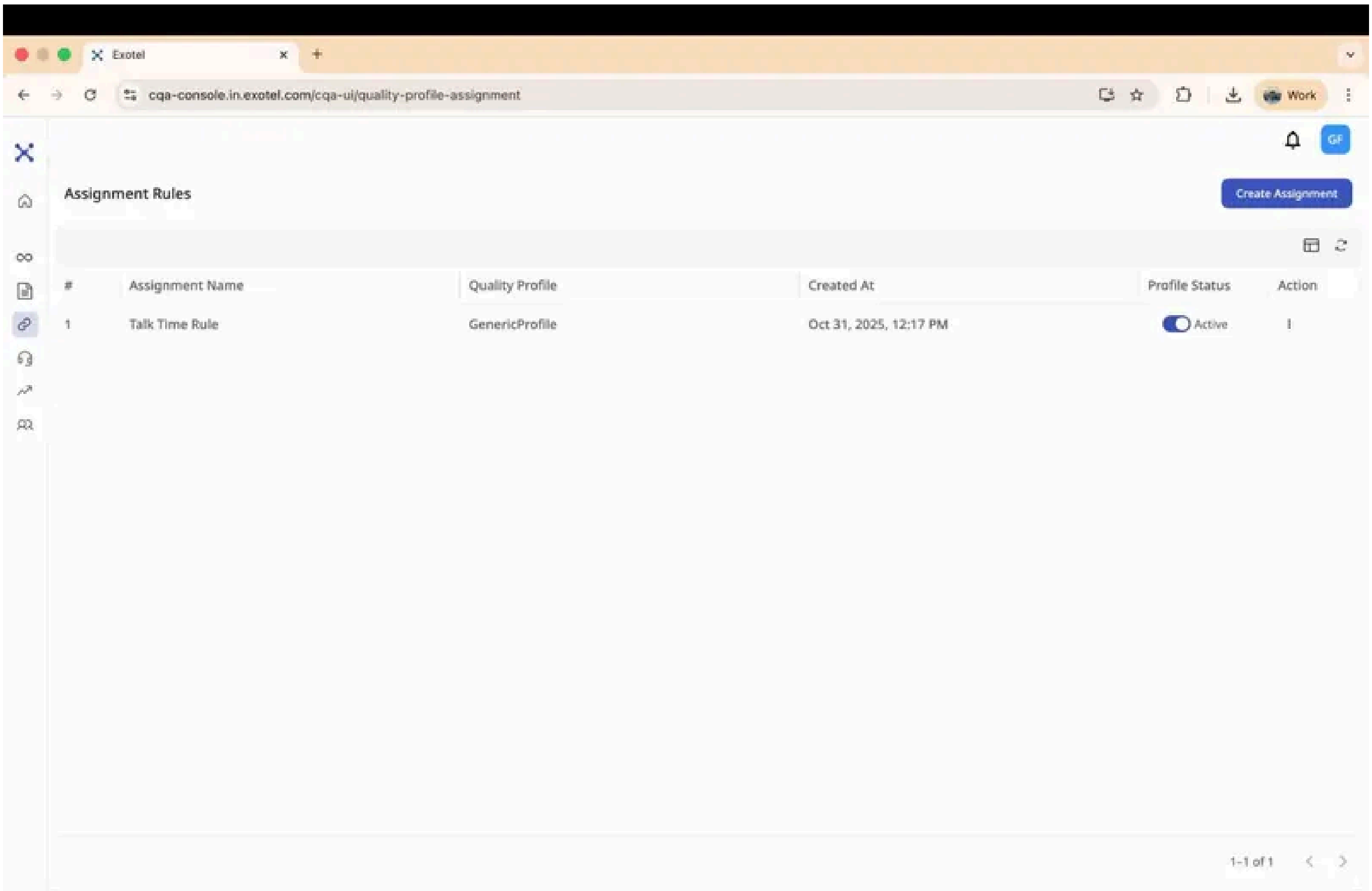
Note: AI-Assisted creation requires enablement by the Exotel delivery team. Contact your Customer Success Manager to activate this capability for your tenant.
```

1. Navigate to **Quality Profiles** and click **Create Profile**, then select **'Create Quality Profile with AI'**.
2. The wizard opens with five steps:**Step 1 — Business Details** Describe your business, industry, and the customers you serve. This gives the AI context to generate KPIs tailored to your specific domain (e.g., banking, insurance, e-commerce support). **Step 2 — Call Use-case** Describe the type of calls to be evaluated. For example: "Inbound support calls aimed at product clarity and first-call resolution." This tells the AI what scenarios the generated KPIs should optimize for. **Step 3 — Evaluation Criteria** Specify what you want to focus on when evaluating these calls. Mention any critical KPIs like script adherence, compliance checks, or customer satisfaction. The AI prioritizes these in the generated profile. **Step 4 — Upload Calls for Analysis** Drag and drop sample call recordings or transcripts. The AI analyzes these actual conversations to understand your interaction patterns and generate more accurate KPIs. Supported formats: MP3, WAV (audio); TXT, PDF, DOC (text). You can upload up to 50 files. **Step 5 — Upload SOP (Optional)** Upload your Standard Operating Procedures as PDF, text, or doc files, or paste a link to Google Docs or Microsoft 365. The AI uses these to align the generated KPIs with your documented processes and compliance requirements. This step is optional — skip it if you do not have SOPs available.
3. Click **Generate** to start. The AI analyzes your uploaded files, cross-references your business context and SOPs, and builds the profile. Processing typically takes 1-2 minutes depending on the number of files uploaded.
4. Review the generated profile. The AI produces a complete structure with categories (e.g., Compliance, Communication Quality, Customer Engagement), sub-categories, and individual KPIs with scoring types and weightages.
5. Edit as needed — adjust KPI questions, change scoring types, modify weightages, add or remove KPIs. The generated output is a starting point that you have full control over.
6. Click **Save** when satisfied. The profile is immediately available for use with Assignment Rules.



4.3. Assignment Rules (Automation)

Goal: Automate the quality assurance process by linking specific calls to specific Quality Profile(s).



CQA supports two assignment types:

Type	When to use	How profiles are chosen
Rule-Based Assignment	Fixed routing by metadata	You select **one/more** Quality Profile; matching calls always use that profile(s) and gets analyzed.
Smart Assignment	Topic-based routing (Smarter Assignment)	You select candidate **Quality Profile(s)**; the system matches call content to profile **Topics**, and can score a call against all the matching Quality profile(s).

4.3.1. How it Works

Instead of manually selecting calls to audit, you create Assignment Rules. As recordings stream into the platform:

Multiple Rules Matching the Same Interaction:

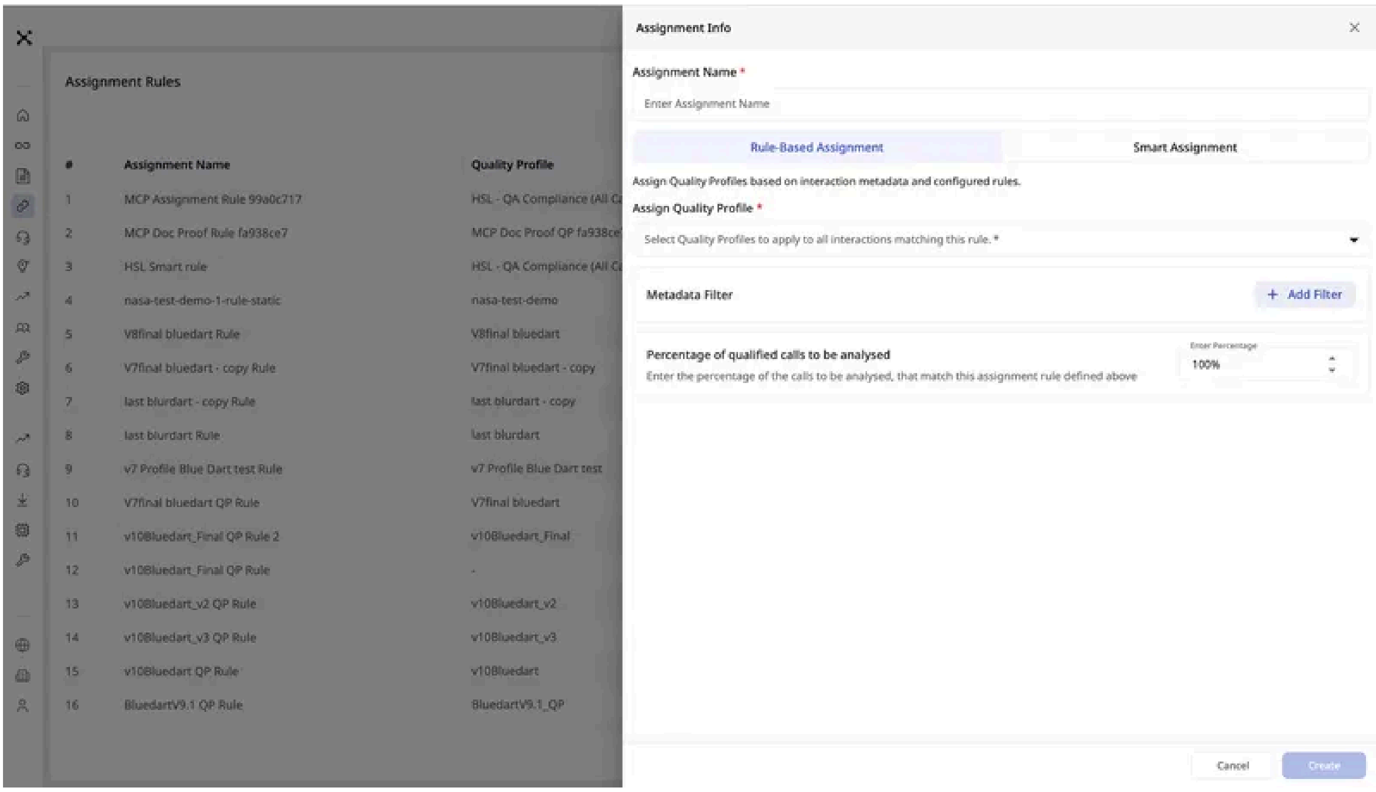
The system evaluates all active assignment rules for every incoming recording – not just the first match. Before analysis begins, it collects the Quality Profiles assigned by all matching rules into a distinct set. One analysis runs per unique Quality Profile in that set.

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.

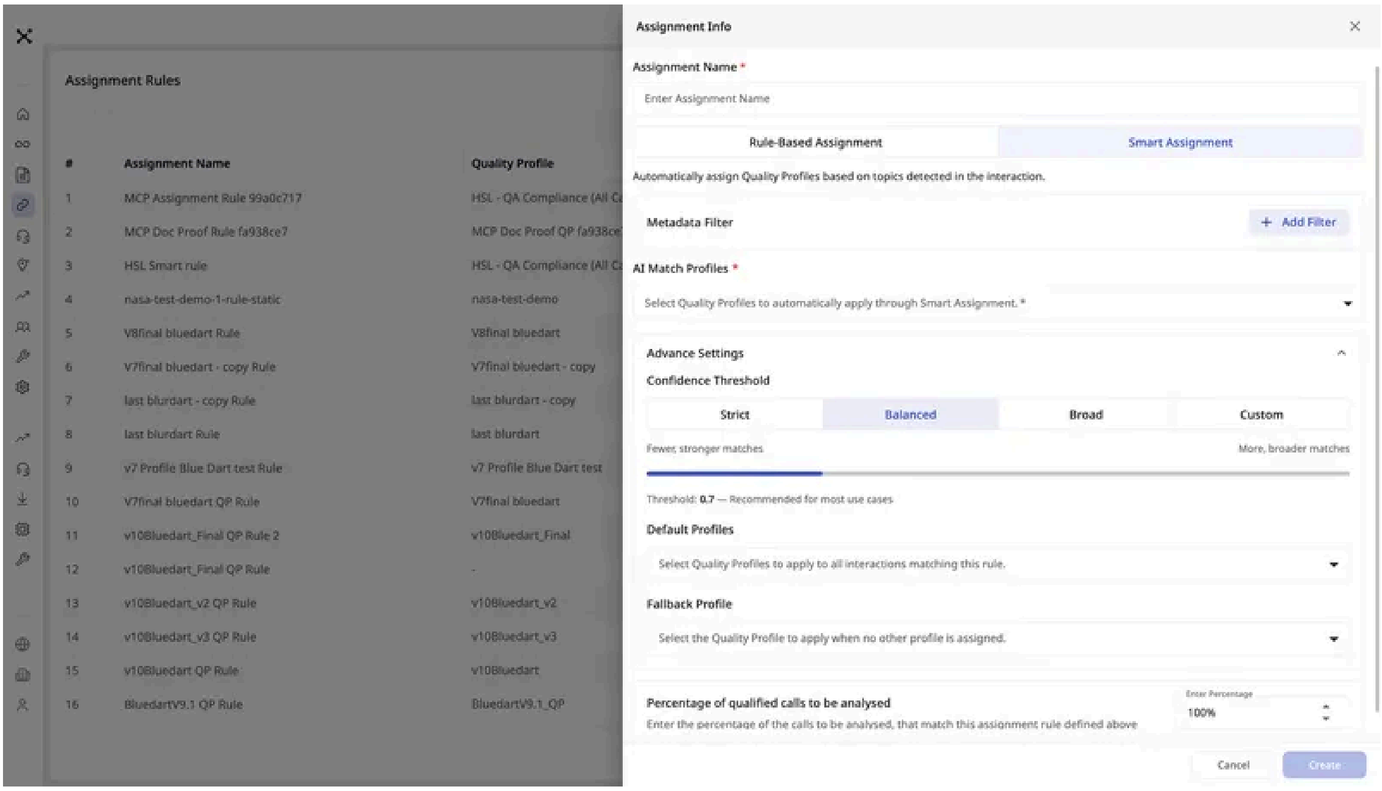
4.3.2. Creating a Rule-based Assignment



1. Navigate to **Assignment Rules**.
2. Click **Create Assignment**.
3. Enter an **Assignment Name**.
4. Keep the **Rule-Based Assignment** tab selected.
5. **Select Quality Profile**: Choose the profile to apply (e.g., "Sales Profile").

6. **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" .
7. Set the **percentage of interactions** to analyze for this rule.
8. Click **Create**. Automation applies the selected profile to matching new calls.

4.3.3. Creating a Smarter Assignment



Use Smart Assignment when different conversations should map to different Quality Profiles based on what was discussed, not only on metadata.

Prerequisites: Add **Topics** on the Quality Profiles you will include in AI Match Profiles (see Building Quality Profiles). Maximum **10 topics** per profile.

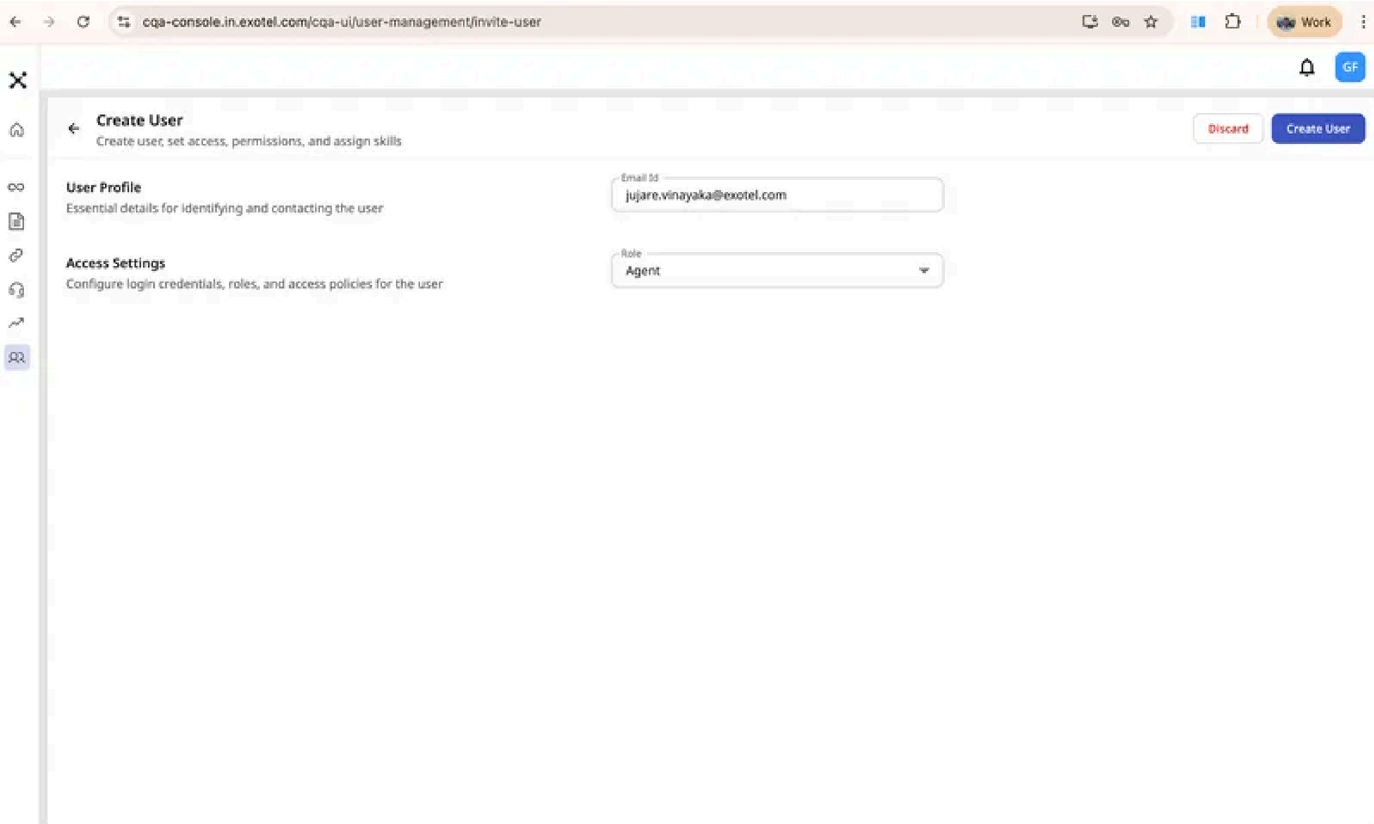
1. Navigate to **Assignment Rules**.
2. Click **Create Assignment**.
3. Enter an **Assignment Name**.
4. Select the **Smart Assignment** tab.
5. **Add Filters (optional)**: Build logic statements using your Metadata fields to Narrow down which calls to be considered for Smarter Assignment.
    - *Example:* 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 considered for Smarter Assignment.
6. **AI Match Profiles**: Select one or more Quality Profiles that may apply based on topics. These are the candidates for topic matching.
7. **Advance Settings** (optional):

- **Confidence Threshold**: Choose how strictly topics must match – **Strict**, **Balanced**, **Broad**, or **Custom** (enter a percentage). Higher confidence means fewer, more certain matches.
- **Default Profiles**: Profiles that are **always** applied when this rule matches, in addition to any topic matches.
- **Fallback Profile**: Used when no AI Match Profile topics match the conversation.

8. Set the **percentage of interactions** to analyze for this rule.
9. Click **Create**.

4.4. Managing and Inviting Users

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



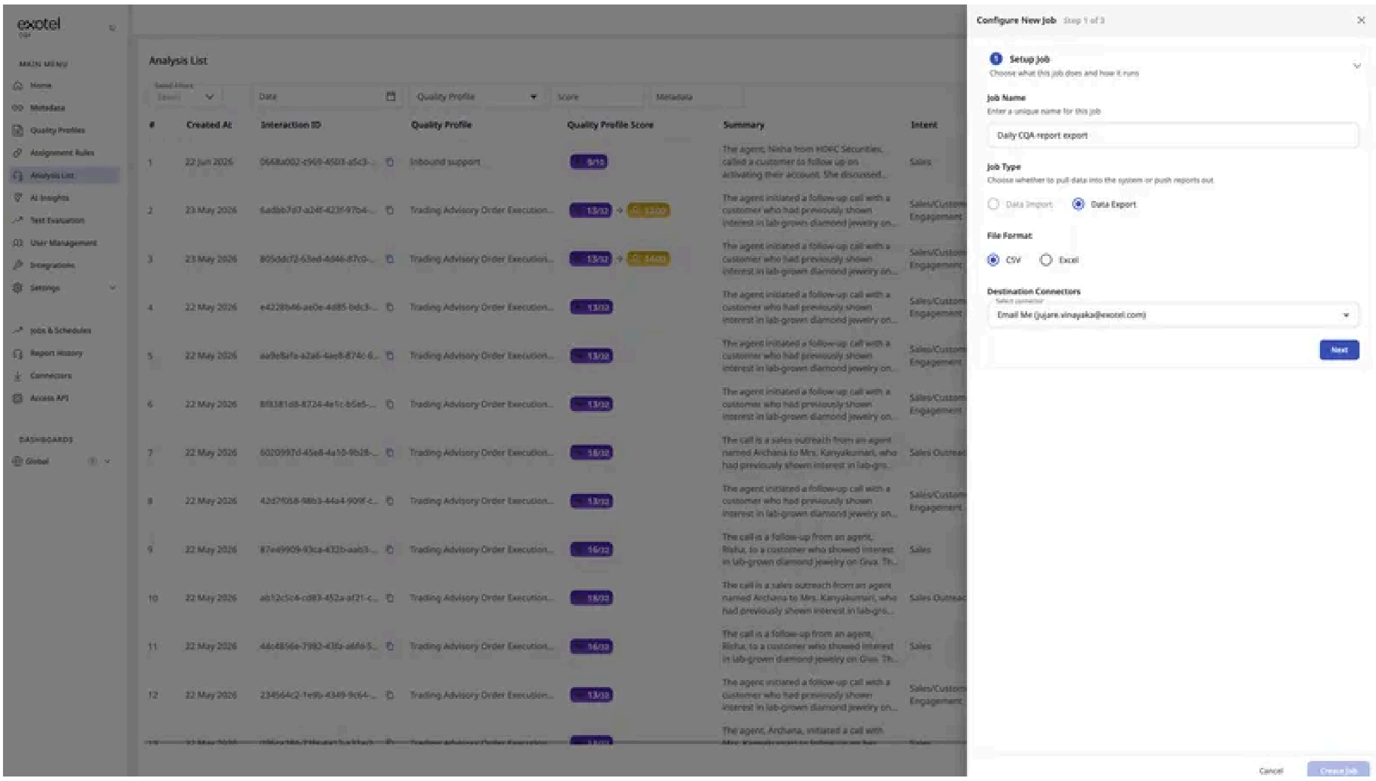
Steps to Invite a New User:

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: Export analysis data on-demand or on a recurring schedule using the guided export job wizard.

CQA now uses a unified, 3-step **Configure New Job** wizard for both one-time exports and scheduled report deliveries. This replaces the previous Export Report / Schedule Report dialog.



Key Concepts:

Concept	Description
Export Job	A named configuration that defines what data to export, how often, and in what format. Jobs can run once or on a recurring schedule.
Job Type	The type of job. For report exports, the job type is **Data Export** (selected automatically).
Frequency	How often the job runs: **One-Time**, **Daily**, **Weekly**, or **Monthly**.
Quality Profile	The report includes all analyses matching that quality profile within the configured date range.
Columns & Filters	Choose which data columns to include in the export and apply filters (e.g., by KPI, score threshold, or metadata) to narrow the result set.
Report History	A dedicated tab where you can view all previously extracted and scheduled reports, download completed exports, and track job execution status.

Creating an Export Job

Navigate to the analysis list page and click **Export Report**. The Configure New Job wizard opens with three steps:

Step 1 – Setup Job

- **Job Name** – enter a descriptive name for the export (e.g., "Daily CQA Report Export" or "Onetime Export").
- The job type **Data Export** is enabled automatically.
- Click **Next** to proceed.

Step 2 – Set Schedule

- **Frequency** – select how often the job should run:
  - **One-Time** – the job runs once immediately after creation.
  - **Daily** – runs every day at the configured time. Specify the time of day and, optionally, a start and end date.
  - **Weekly** – runs on a selected day each week.
  - **Monthly** – runs on a selected date each month.
- For recurring schedules (Daily/Weekly/Monthly), configure the **start date**, **end date** (or select "Never End"), and the **time of day**.
- Click **Next** to proceed.

Step 3 – Select Data & Filters

- **Quality Profile** – choose the quality profile whose analyses you want in the report.
- **Date Range** – define the reporting window for the data.
- **Columns** – select which data fields to include in the export (e.g., metadata fields, KPI scores, transcripts, summaries, dispute details).
- **Filters** – optionally narrow results by specific KPIs, score thresholds, or metadata values.
- **File Format** – choose CSV or Excel.
- Click **Create Job** to save and activate.

For one-time exports, the report is generated immediately. For scheduled jobs, reports are generated automatically at each scheduled interval.

Viewing Reports

Navigate to the **Report History** tab (available in the left sidebar) to:

- View all completed and in-progress export jobs.
- Download generated reports.
- Check execution status and timestamps.
- Re-trigger a failed or missed export.

Note: The Report History tab replaces the need to track scheduled reports solely via email. Reports are also delivered to configured export destinations (email, S3, SFTP) if set up via the Data Integration Console – see Section 6.4 for details.

Exporting Reports from the Analysis List

In addition to creating export jobs from the Jobs & Schedules 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.
```

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 11 predefined categories:

Category
Phone Number
Email Address
Person Name
Physical Address
PAN (India)
Aadhaar (India)
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.

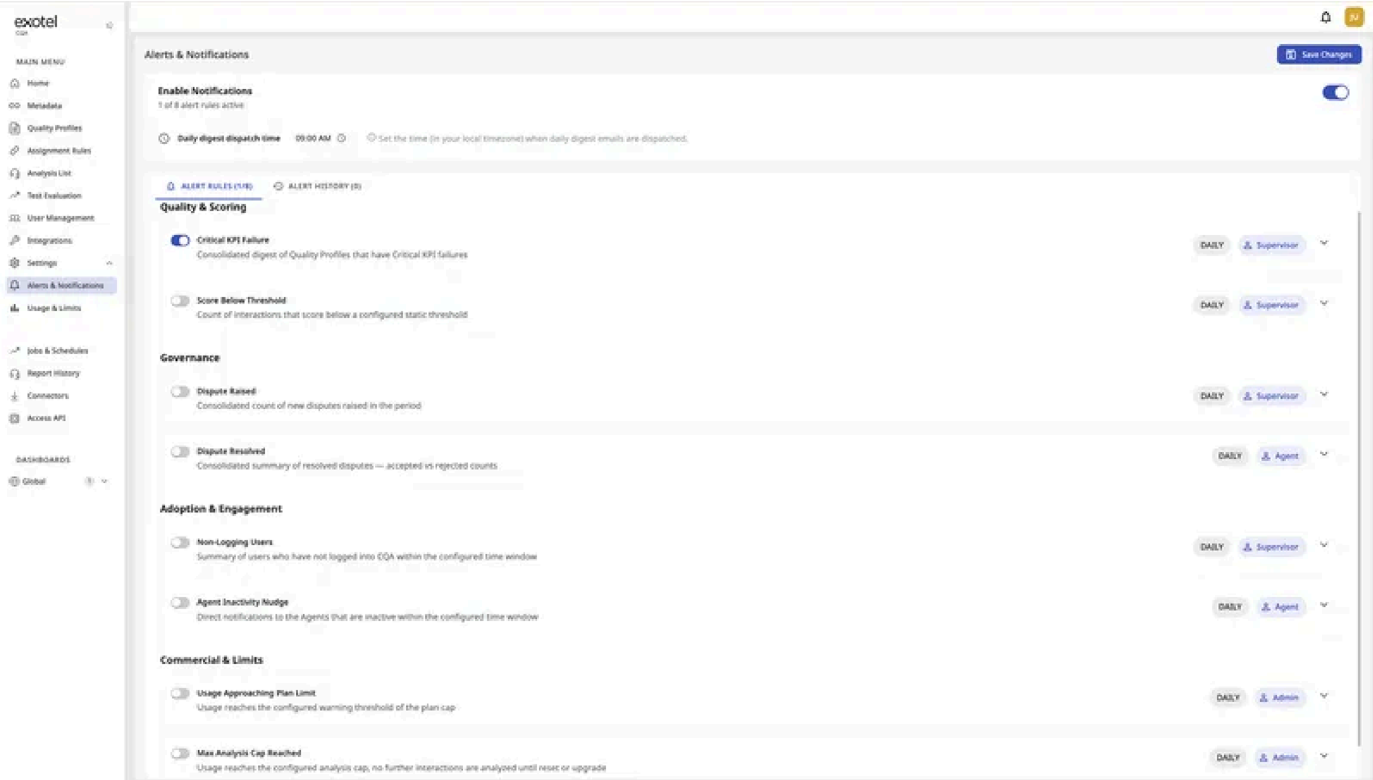
```
Important: PII redaction changes apply only to interactions processed after the configuration is applied.
Previously analyzed interactions are not retroactively modified.
```

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.

4.7. Alerts & Notifications

Goal: Proactively surface quality issues, governance activity, adoption gaps, and usage warnings via scheduled email digests – so supervisors and admins act on problems without having to log into the dashboard.



4.7.1. How it Works

The Alerts & Notifications engine evaluates active alert rules on a configured schedule (daily, weekly, or monthly). When a rule's conditions are met – for example, a critical KPI fails or an agent has not logged in – the engine builds a consolidated digest email and sends it to the configured recipients. Multiple events of the same type are batched into a single email per cadence run, so recipients receive one actionable summary instead of individual notifications for every occurrence.

4.7.2. Alert Event Types

CQA supports 8 alert event types organized across four categories:

Quality & Scoring

Event	Description	Default Recipient	Configurable Fields
Critical KPI Failure	A critical KPI fails on an interaction (e.g., compliance disclosure missing). The digest lists all critical KPI failures from the evaluation period.	Supervisor	Cadence, Recipients
Score Below Threshold	Any interaction's final score falls below a configured threshold (e.g., score < 60%). The digest reports the count of interactions below the threshold.	Supervisor	Score threshold (%), Cadence, Recipients

Governance

Event	Description	Default Recipient	Configurable Fields
Dispute Raised	New disputes are raised on AI-scored KPIs. The digest reports the count of new disputes.	Supervisor	Cadence, Recipients
Dispute Resolved	Previously raised disputes are accepted or rejected. The digest summarizes accepted vs. rejected counts.	Agent	Cadence, Recipients

Adoption & Engagement

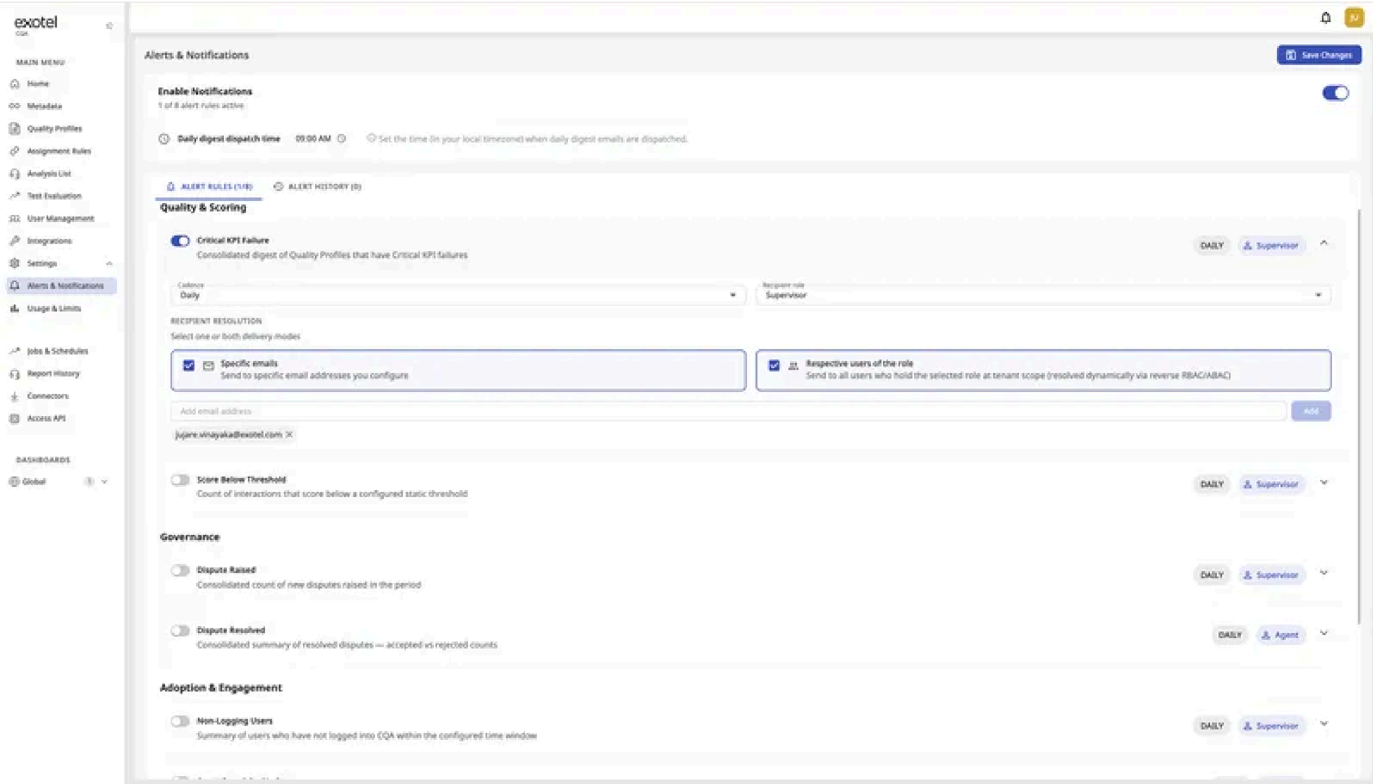
Event	Description	Default Recipient	Configurable Fields
Non-Logging Users	Agents or supervisors have not logged into CQA within a configured window. The digest lists inactive users (name, email, last login date) for supervisors or admins to act on.	Supervisor	Inactivity window (days), Cadence, Recipients
Agent Inactivity Nudge	Sends a direct nudge email to agents who have not logged in within a configured window, prompting them to check their quality insights. Each agent receives at most one nudge per digest cycle.	Agent (self)	Inactivity window (days), Cadence

Commercial & Limits

Event	Description	Default Recipient	Configurable Fields
Usage Approaching Plan Limit	The tenant's analysis usage reaches the configured warning threshold of the plan cap. The email includes current usage vs. committed usage (absolute and percentage).	Admin	Cadence, Recipients
Max Analysis Cap Reached	The tenant hits the analysis cap – no further interactions are analyzed until the limit is reset or the plan is upgraded.	Admin	Cadence, Recipients

4.7.3. Configuring Alert Rules

Navigate to **Settings > Alerts & Notifications** in the sidebar. The page has two tabs: **Alert Rules** and **Alert History**.



Enabling Notifications

1. Toggle **Enable Notifications** at the top of the page. This is the master switch for the tenant – when off, no alert emails are sent regardless of individual rule settings.
2. Set the **Daily digest dispatch time** (e.g., 09:00 AM). This controls when daily digest emails are dispatched, in your local timezone. Aligning this with your team's working hours ensures alerts arrive at the start of the day.

Setting Up an Alert Rule

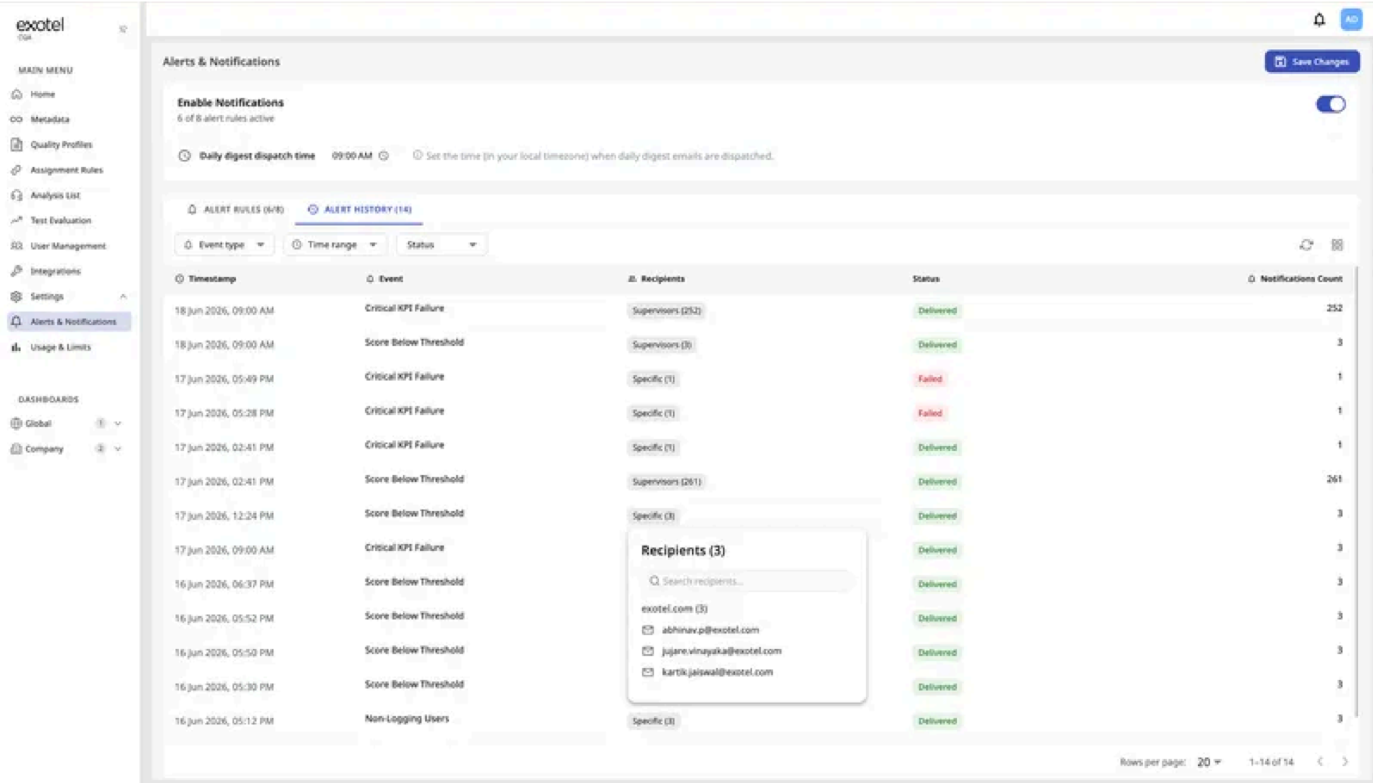
1. On the **Alert Rules** tab, you will see all 8 events grouped by category. Each event shows its name, a brief description, the current cadence, and the default recipient role.
2. Click the expand arrow on any event to configure it.
3. **Cadence** – Select how often the alert should run: Daily, Weekly, or Monthly.
4. **Recipient Role** – Choose the default role for recipients (e.g., Supervisor, Agent, Admin).
5. **Recipient Resolution** – Select one or both delivery modes:
   - **Specific emails**: Enter specific email addresses that should receive the alert.
   - **Respective users of the role**: Automatically sends to all users who hold the selected role at the tenant level. Recipients are resolved dynamically – when a new user is added to the role, they automatically start receiving alerts.
6. **Threshold** (where applicable) – For events like Score Below Threshold, enter the threshold value (e.g., 60%). For Non-Logging Users and Agent Inactivity Nudge, enter the inactivity window in days.
7. Toggle the event **on** (blue) to activate it.
8. Click **Save Changes** at the top right to apply.

```
Note: Alert rules are configured post-onboarding – Quality Profiles and Users should already be set up before
```

```
activating alerts.
```

4.7.4. Alert History

Switch to the **Alert History** tab to view a log of all sent notifications.



Columns

Column	Description
Timestamp	Date and time the notification was dispatched.
Event	The alert event type (e.g., Critical KPI Failure, Score Below Threshold).
Recipients	The recipients who were targeted. Click to see individual email addresses.
Status	Delivery status of the notification.
Notifications Count	The number of individual notifications included in the digest (e.g., 252 critical KPI failures in one digest email).

Delivery Statuses

Status	Meaning
Delivered	All intended recipients received the email.
Failed	No recipients received the email.
Pending	The notification is queued but has not been sent yet.
Partially Delivered	Some recipients received the email and some did not (e.g., a user has no email address on record).

Filtering

Use the filter dropdowns at the top of the history table to narrow results by:

- **Event type** – Show only a specific alert type.
- **Time range** – Restrict to a date range.
- **Status** – Filter by delivery status.

4.7.6. Enabling Alerts & Notifications

Alerts & Notifications is disabled by default for all tenants. To enable it:

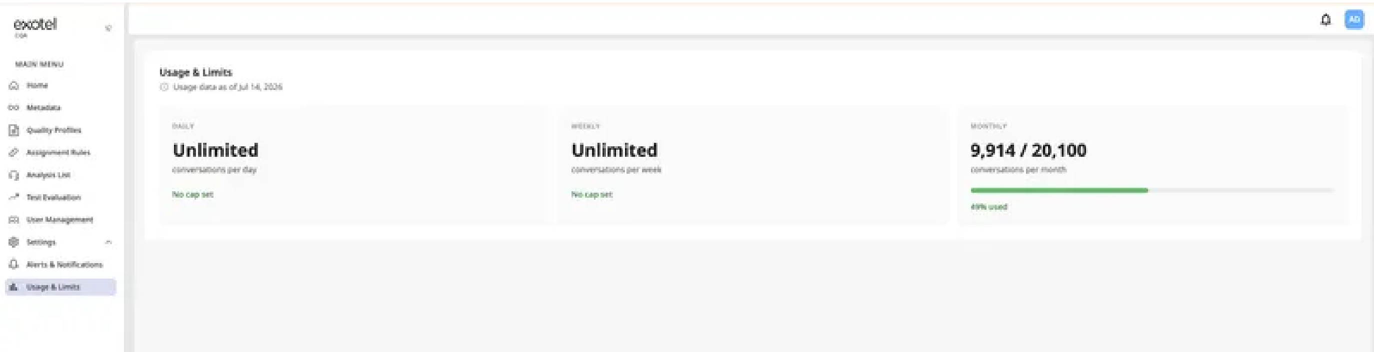
1. Contact the Exotel delivery team or your Customer Success Manager.
2. The delivery team will activate the feature for your tenant.
3. Once enabled, an Admin can navigate to **Settings > Alerts & Notifications** to configure and activate individual alert rules.

4.8. Usage & Limits

Goal: Give tenant Admins self-service visibility into analysis consumption against Daily, Weekly, and Monthly caps – without filing a support ticket for usage numbers.

4.8.1. Accessing Usage & Limits

1. Log in as an **Admin**.
2. Navigate to **Settings > Usage & Limits**.



Supervisors and Agents do not have access to this page.

4.8.2. What You See

The Usage & Limits page shows:

- **Daily, Weekly, and Monthly caps** – The upper limits configured for your tenant's analysis volume.
- **Actual usage through the previous day** – How much of each cap has been consumed. Usage is updated on a **daily** basis (data as of the previous day's end). It is not a live / real-time counter.

Use this view to track consumption against your plan, anticipate approaching limits, and plan capacity or upgrades with your CSM.

4.8.3. How Caps Are Set

Analysis caps are configured for your tenant by Exotel (delivery). They are **not editable** by tenant Admins on the Usage & Limits page.

To change Daily, Weekly, or Monthly caps:

1. Contact your Customer Success Manager or the Exotel delivery team.
2. Request the updated limit values for your tenant.
3. Once applied, the new caps appear on **Settings > Usage & Limits**.

4.8.4. When a Cap Is Reached

If the tenant hits a hard analysis cap, further interactions may not be analyzed until the limit resets for the period or the plan is adjusted. Admins can also enable email warnings via **Settings > Alerts & Notifications**:

- **Usage Approaching Plan Limit** – Warning before the hard stop.
- **Max Analysis Cap Reached** – Notification when the cap is hit.

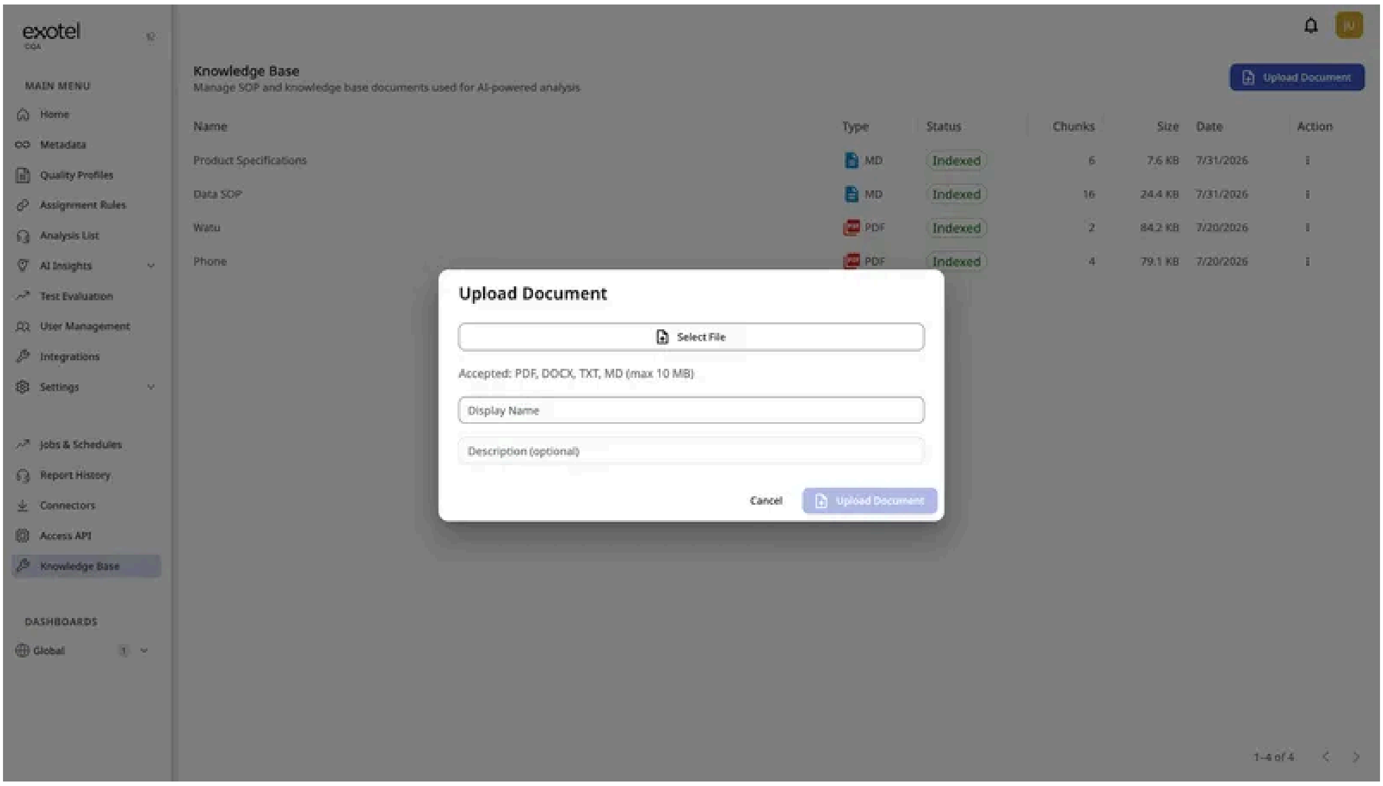
See **Alerts & Notifications** for configuration.

4.8.5. Important Notes

- **Admin-only** – Only Admin users can open Usage & Limits.
- **Previous-day freshness** – Expect usage to reflect processing through the previous day, not the current hour.
- **Visibility, not billing settlement** – This page shows consumption against caps; formal billing and commercial adjustments remain with your CSM / commercial team.

4.9. Knowledge Base Integration

Goal: Upload and manage account-level SOP, product, and compliance documents so CQA can use them as context when evaluating selected KPIs. Knowledge Base improves evaluation context and coaching suggestions without changing your Quality Profile rubric



Enablement: Knowledge Base is **not enabled for every tenant by default**. Contact your Customer Success Manager or CQA Support to enable it for your account.

4.9.1. How it Works

1. Administrators upload documents to the tenant **Knowledge Base** (account-level library).
2. Documents are processed until they show a ready status.
3. On a Quality Profile, you **link** one or more ready documents to the specific KPIs that should use that context.
4. For new analyses that use those KPIs, the AI can reference the linked documents during evaluation.

4.9.2. Uploading Documents

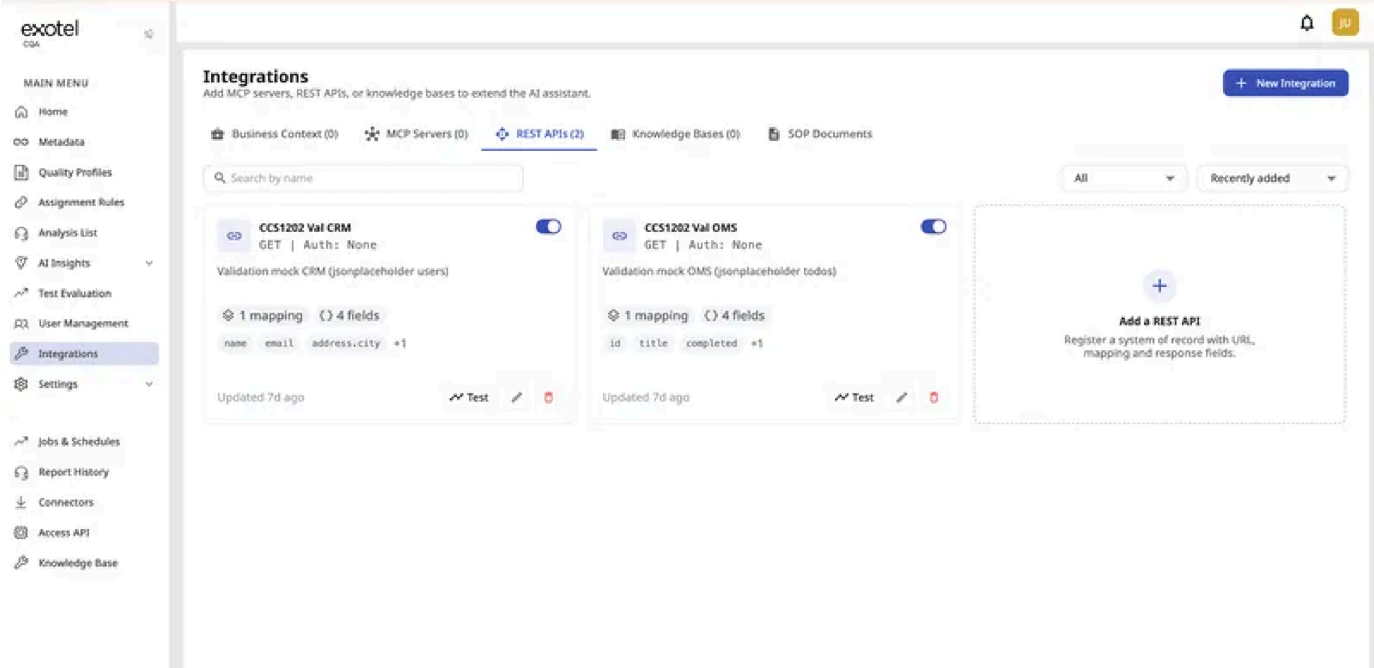
1. Navigate to **Knowledge Base** in the sidebar (visible when the feature is enabled for your tenant).
2. Upload the document(s) you want the AI to reference. Supported formats typically include PDF, text, and Word documents (follow on-screen guidance for limits and types).
3. Click on **Sync Status** post the document upload, to change the Status from **Pending** to **Indexed**

4.9.3. Linking Documents to KPIs

1. Navigate to **Quality Profiles** and create the profile that should use Knowledge Base context.
2. Open the KPI that should reference your SOP or policy document.
3. Link one or more **Indexed** Knowledge Base documents to that KPI.
4. Save the Quality Profile. New interactions analyzed with that KPI can use the linked material as evaluation context.

4.10. Integrations & Second-Order KPI Scoring

Goal: Before scoring selected KPIs, CQA can call your REST systems of record, project only the fields bound on that KPI, and attach labeled external ground truth so the model verifies agent claims against truth – not transcript guesswork alone. This is **Second-Order KPI Scoring**.




```
Note: Integrations / Second-Order KPI Scoring requires enablement by the Exotel delivery team. Contact your
Customer Success Manager to activate this capability for your tenant. Only Admin users with the Integrations
permission see the module.
```

4.10.1. Register a REST API (Integrations)

1. Open **Integrations** from the sidebar.
2. Select the **REST APIs** tab.
3. Click **+ New Integration**.
4. Enter a unique **name** (unique within the tenant).
5. Set the **HTTP method** (Phase 1 supports **GET**) and a **URL template** with placeholders for values that come from interaction metadata (e.g. https://oms.example.com/orders/{orderId}).
6. Map **interaction metadata keys → URL / query parameters** so each analysis can resolve the correct record.
7. Define the **response field catalog**: for each field the LLM may use, set a path into the JSON response and a short **meaning** that describes what the field represents.
8. Save. The integration is available to bind on Quality Profile KPIs via **Use Tool**.

Tips:

- Declare only fields you intend to select on KPIs – the platform sends selected fields only, not the full API body.
- Keep metadata key names aligned with what ingestion / connectors actually send on interactions.
- REST API integrations for Second-Order scoring are distinct from **Inject to AI** on Metadata (short additional-context strings, truncated for AI).

4.9.2. Bind tools on a KPI (Use Tool)

1. Open a Quality Profile and edit the KPI that needs external verification.
2. Enable **Use Tool**.
3. Select one or more registered REST integrations.
4. For **each** selected integration, choose **at least one** field from that catalog. Empty field selection blocks save.
5. Save the profile.

At analysis time, CQA resolves URL params from the interaction's metadata, performs **one HTTP call per unique tool+URL** for that analysis (shared across KPIs that need the same call), and attaches labeled external-data blocks for the bound KPIs before scoring runs.

4.9.3. Failure behavior

If a required tool cannot be resolved or returns unusable data, analysis **fails closed** (does not silently score without verification):

Reason	Typical cause	What to check
TOOL_METADATA_MISSING	A mapped metadata key is absent or empty on the interaction	Ingestion mapping; sample interaction metadata; tool URL param map
TOOL_UNAVAILABLE	Tool HTTP error (e.g. 4xx), tool disabled/missing, or selected response fields missing from the payload	Tool URL / credentials with the customer system; field paths in the catalog; network allowlists

1.4. Operational Workflows

Target Audience:

QA Analysts, Supervisors, Agents

Description:

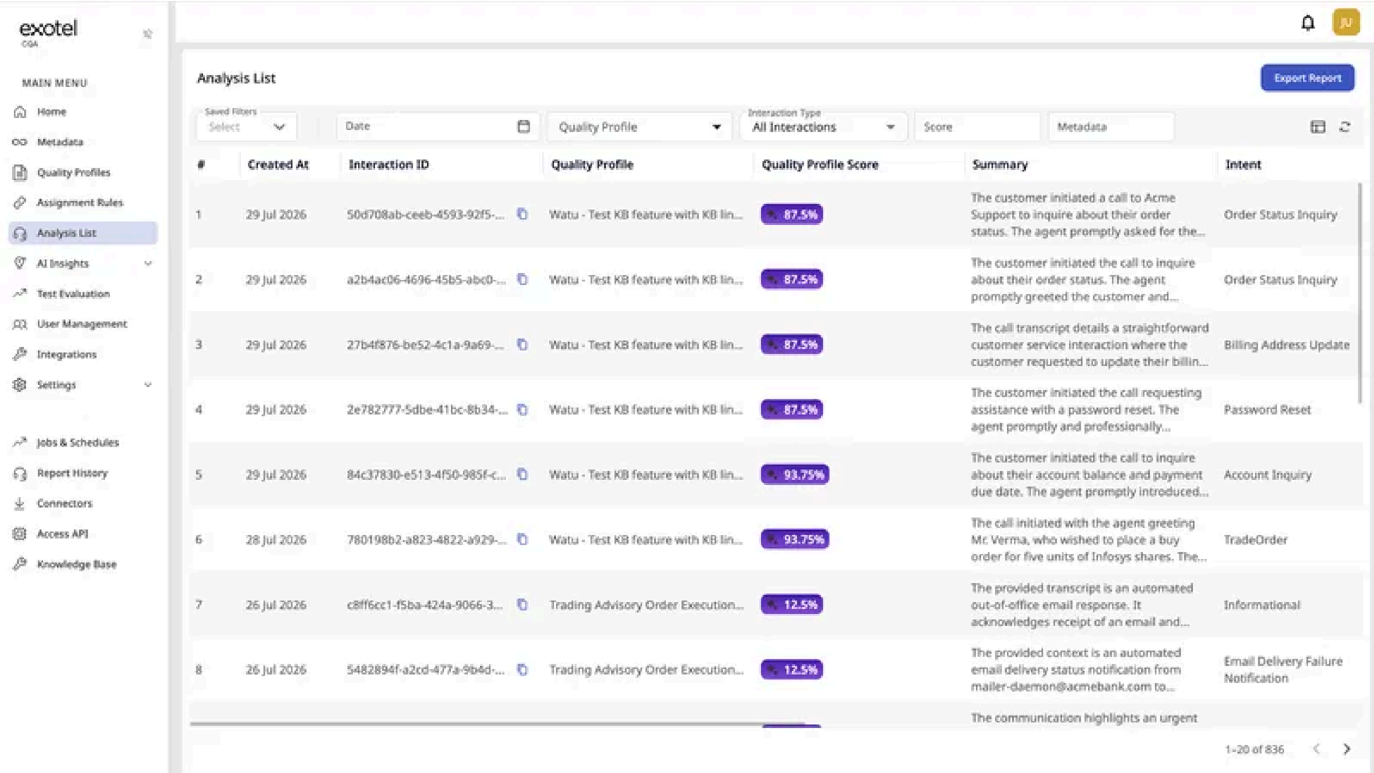
The day-to-day guide for users actually interacting with the processed data, scoring calls, and managing disputes.

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, Metadata (e.g., "Show me calls from Campaign A"), and Interaction Type.
    - **Interaction Type** lets you narrow the list to interactions that need attention:
        - **Disputed Interactions:** Interactions with open or relevant disputes (same pattern as before).

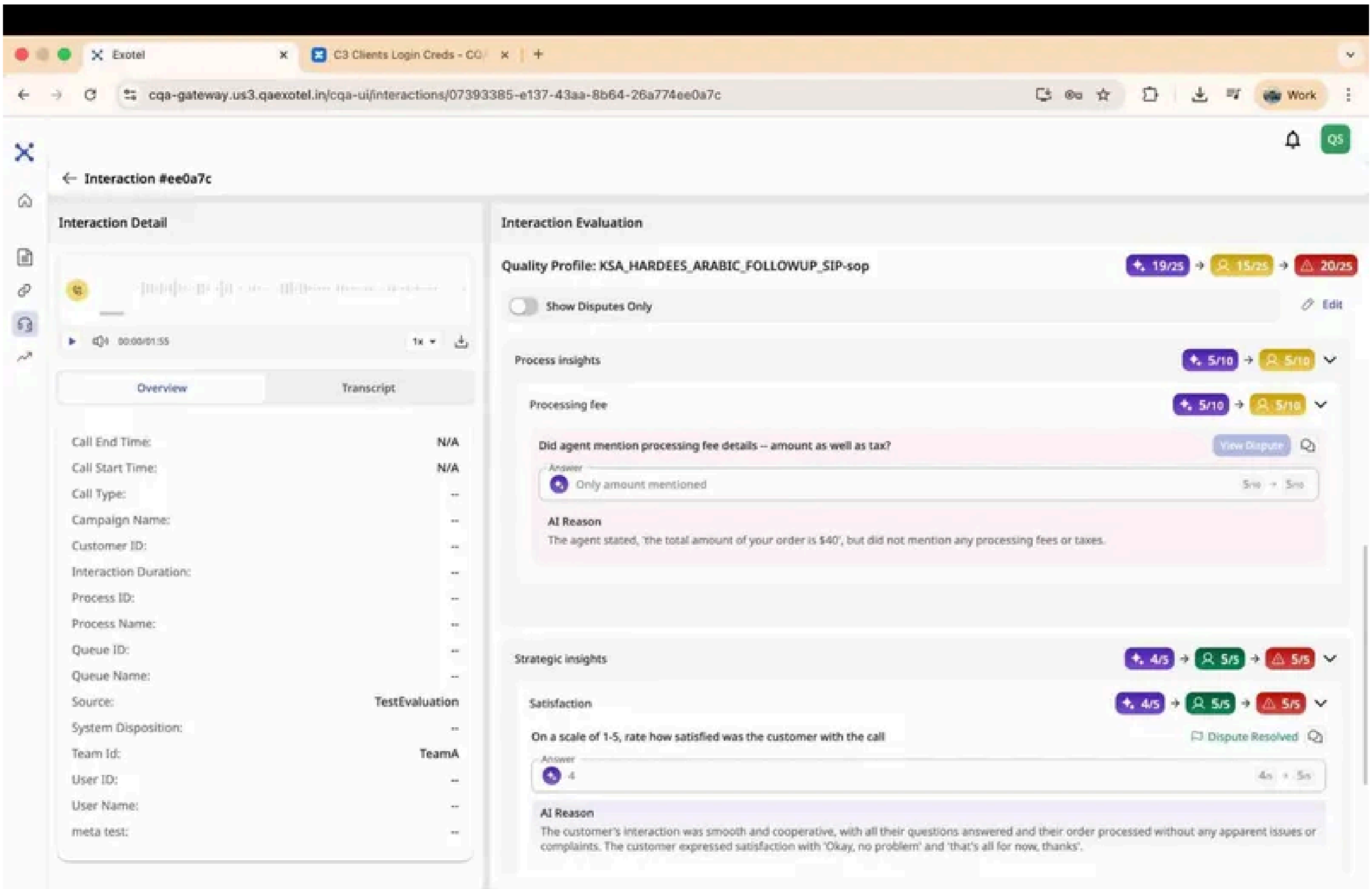
- Critical KPI Failures: see below
    - **Critical KPI Failures:** Interactions where at least one **Critical** KPI failed evaluation (per Quality Profile criticality settings).

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:**
    - **Step 1**: Set up the job – job name, file format (CSV / Excel), destination connector (email)
    - **Step 2**: Set a schedule – frequency options (One-time, Hourly, Daily, Weekly, Monthly) with start/end dates for recurring schedules
    - **Step 3**: Select data – quality profile, date range, saved filters, and column selection (Base Details, Critical Score Details, KPIs, Metadata, etc.)

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

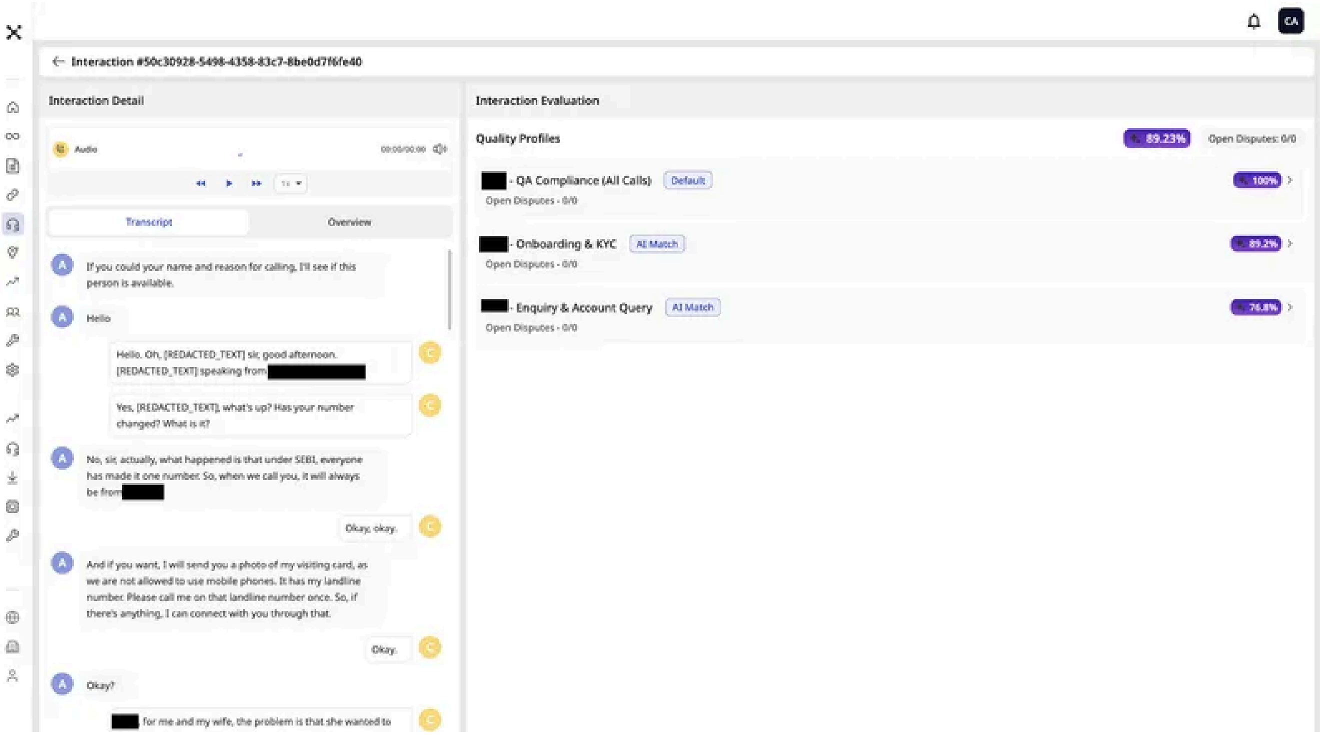
Context: Once a specific call is identified in the Analysis List, Supervisors can drill down to understand *why* a score was given.



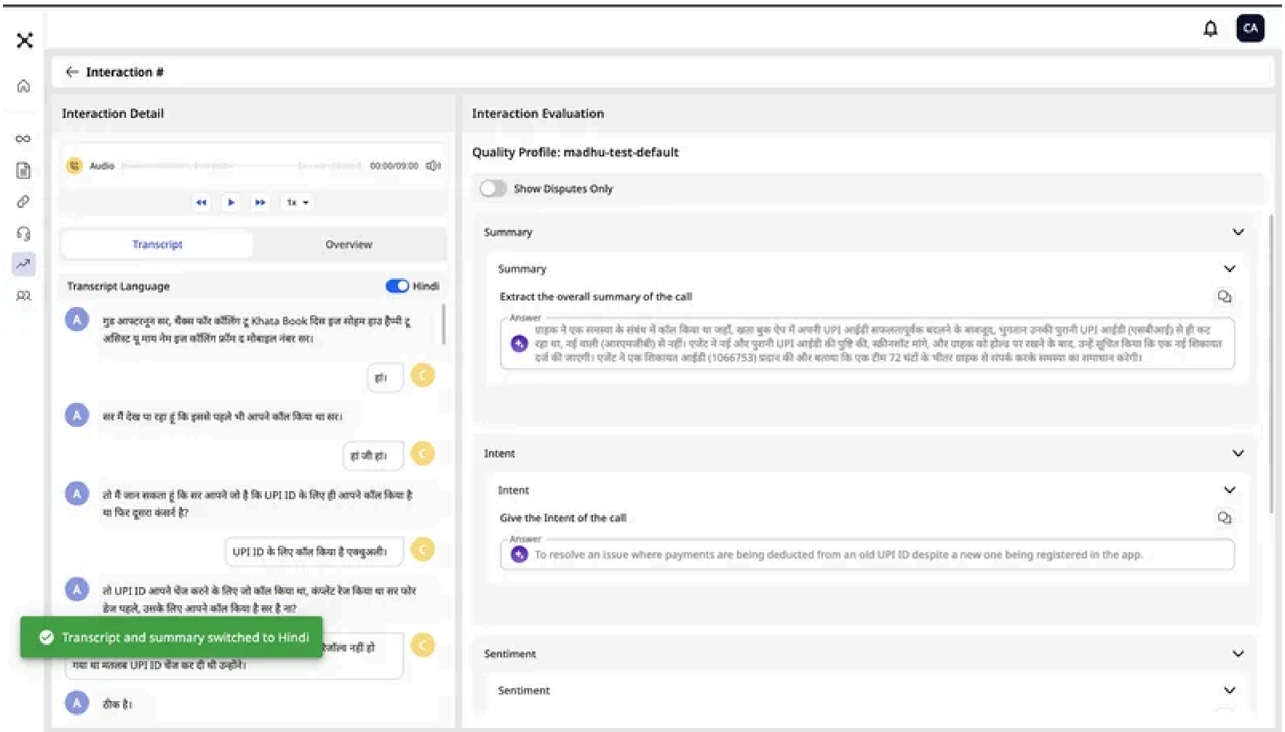
Steps:

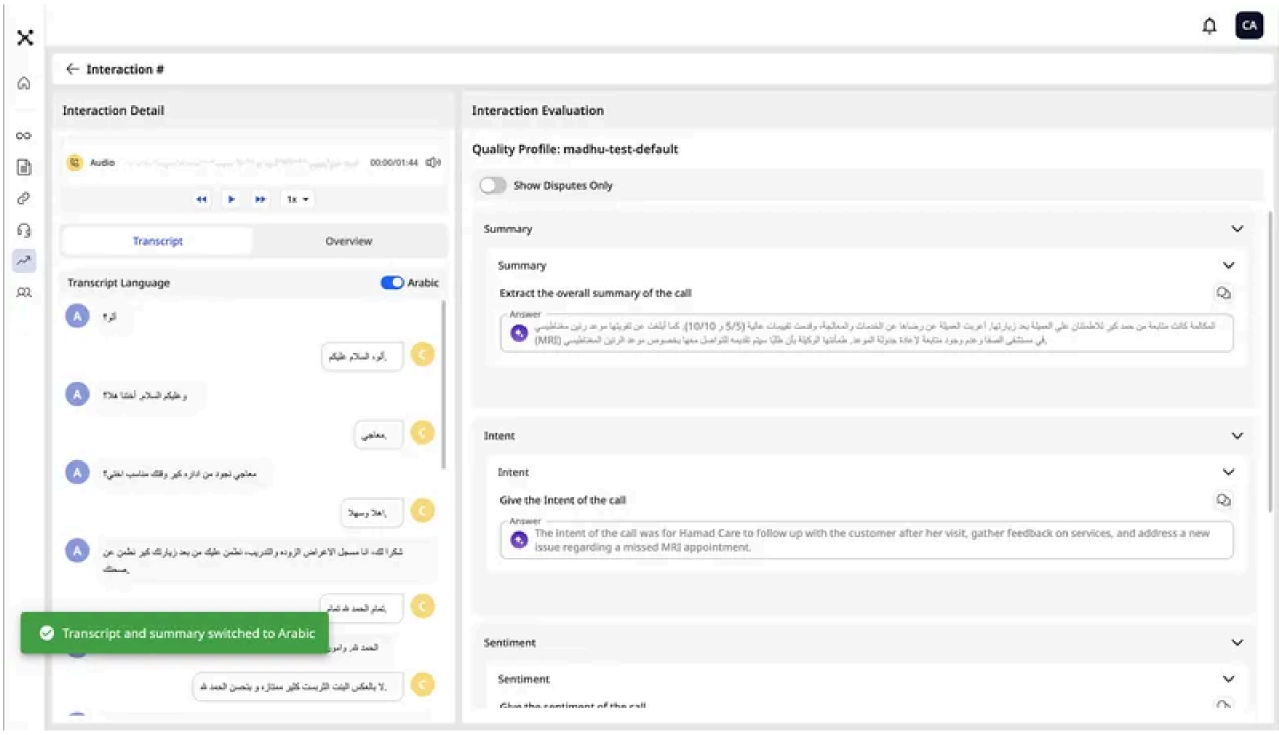
1. **Open Interaction:** Click on any **Interaction ID** in the list to open the detailed **Interaction View**.
2. **Multiple Quality Profiles:**

- When a call is routed via **Smart Assignment** (Smarter Assignment), it may be scored against more than one Quality Profile.
- The Analysis List and Interaction detail show results for each profile that was applied to that call.
- Select a Quality Profile to get the detailed view for that interaction.



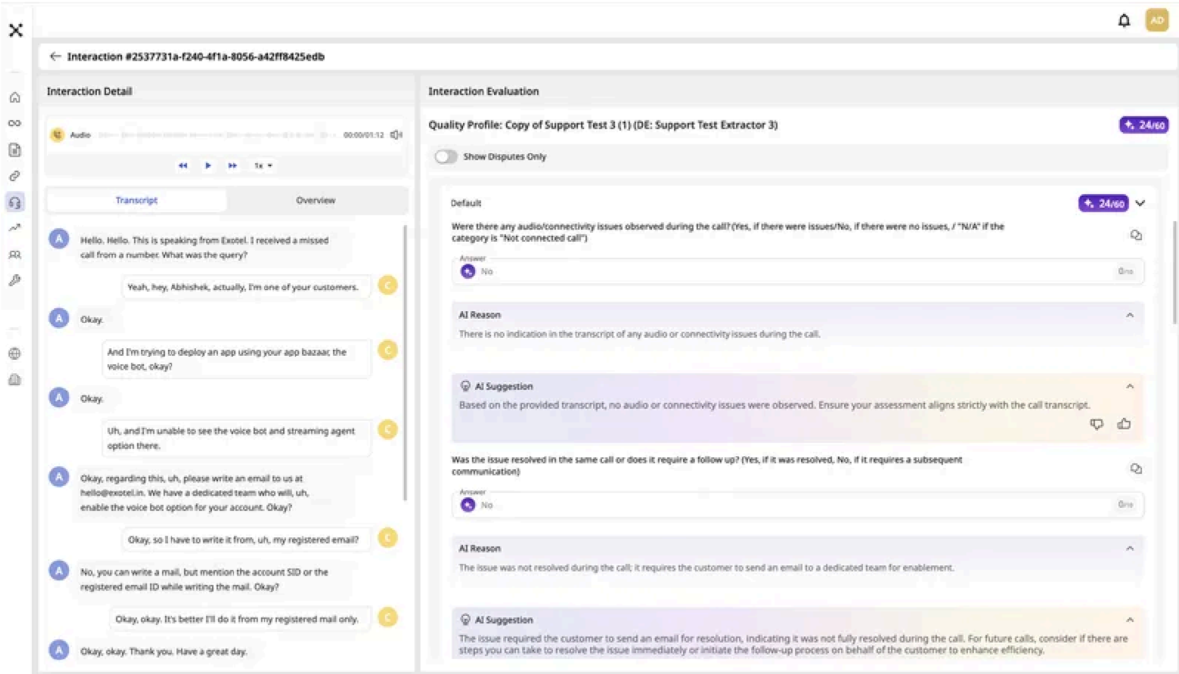
3. **Review Media:**
   - **Player:** Use the embedded audio player to listen to the call recording.
   - **Transcript:** Switch to the **Transcript** tab to read the speech-to-text log of the conversation. By default, the transcript is displayed in **English**.
     - **Language Toggle** *(requires 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.





4. **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: Reviewing Agent Summary (AI Insights)

Goal: Review AI-generated performance summaries at org, team, or agent level – weak checks, coaching priorities, and who needs attention – without opening interactions one by one.

Context: **Agent Summary** is the agent-performance lens under **AI Insights** (tabs: Org / Team / Agent Insights). Use it alongside **QP Insights** (Quality Profile lens) and the Analysis List (interaction lens).

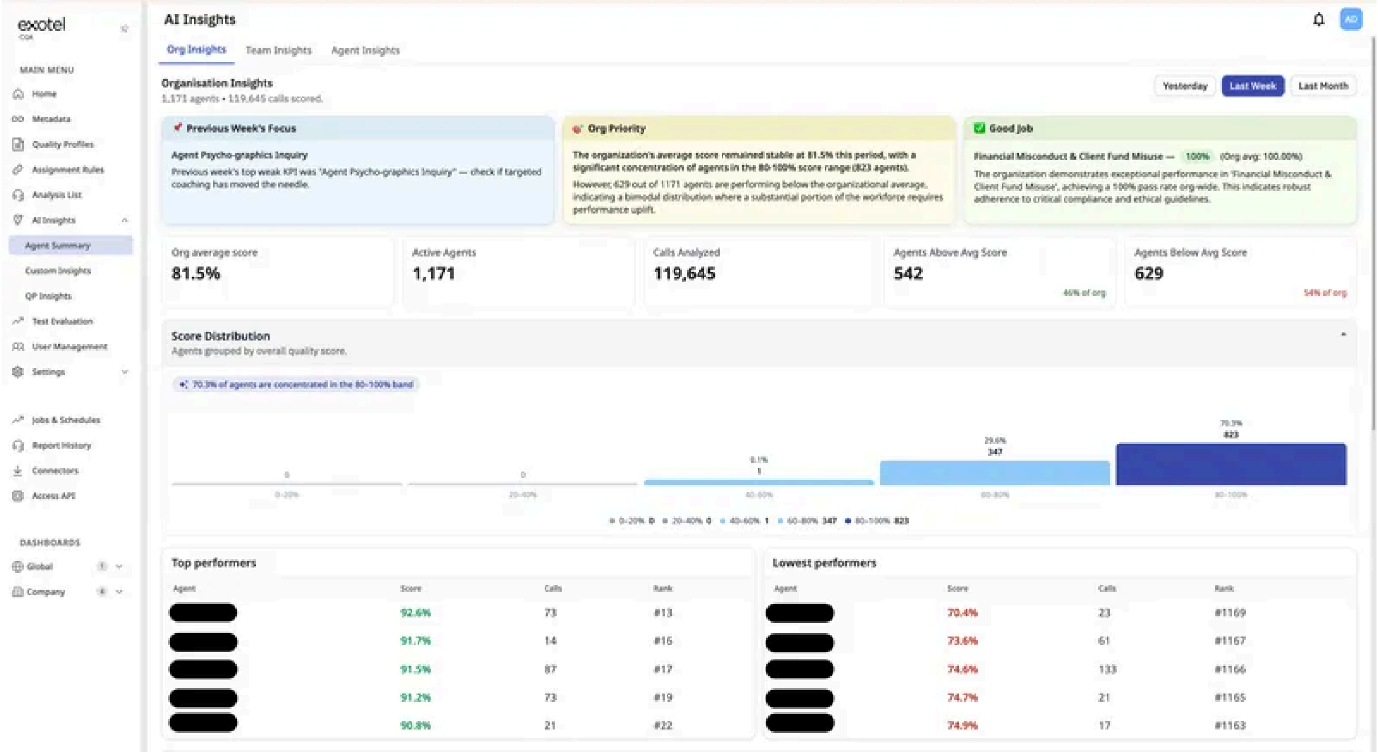
```
Enablement: Agent Summary is not enabled for every tenant by default. Contact your Customer Success Manager or Support to enable AI Insights for your account. Users also need a role that can open performance insights.
```

How to open: After enablement, go to **AI Insights** → **Agent Summary**.

Period filters: Switch between **Yesterday**, **Last Week**, and **Last Month**.

5.3.1. Org Insights (Admin)

Use this tab for an organization-wide view.

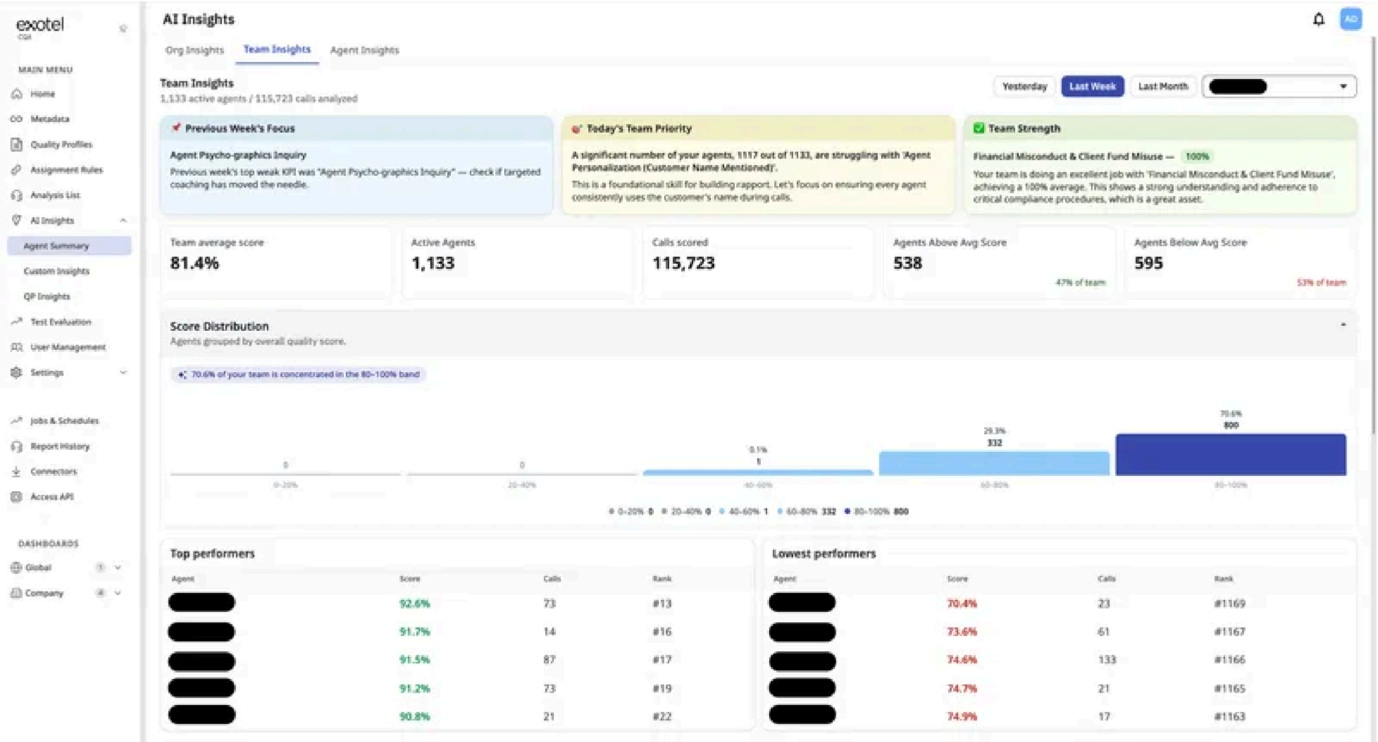


Typical sections:

- Highlight cards (for example previous period focus, org priority, and strengths).
- Metrics such as org average score, active agents, calls analyzed, and agents above/below average.
- **Score distribution** across score bands.
- **Top performers** and **lowest performers** tables.
- **Org-wide weak KPIs** – expandable rows with coaching guidance (for example “Do this week”).
- **Agents who need attention** – bottom performers with a minimum number of scored calls.

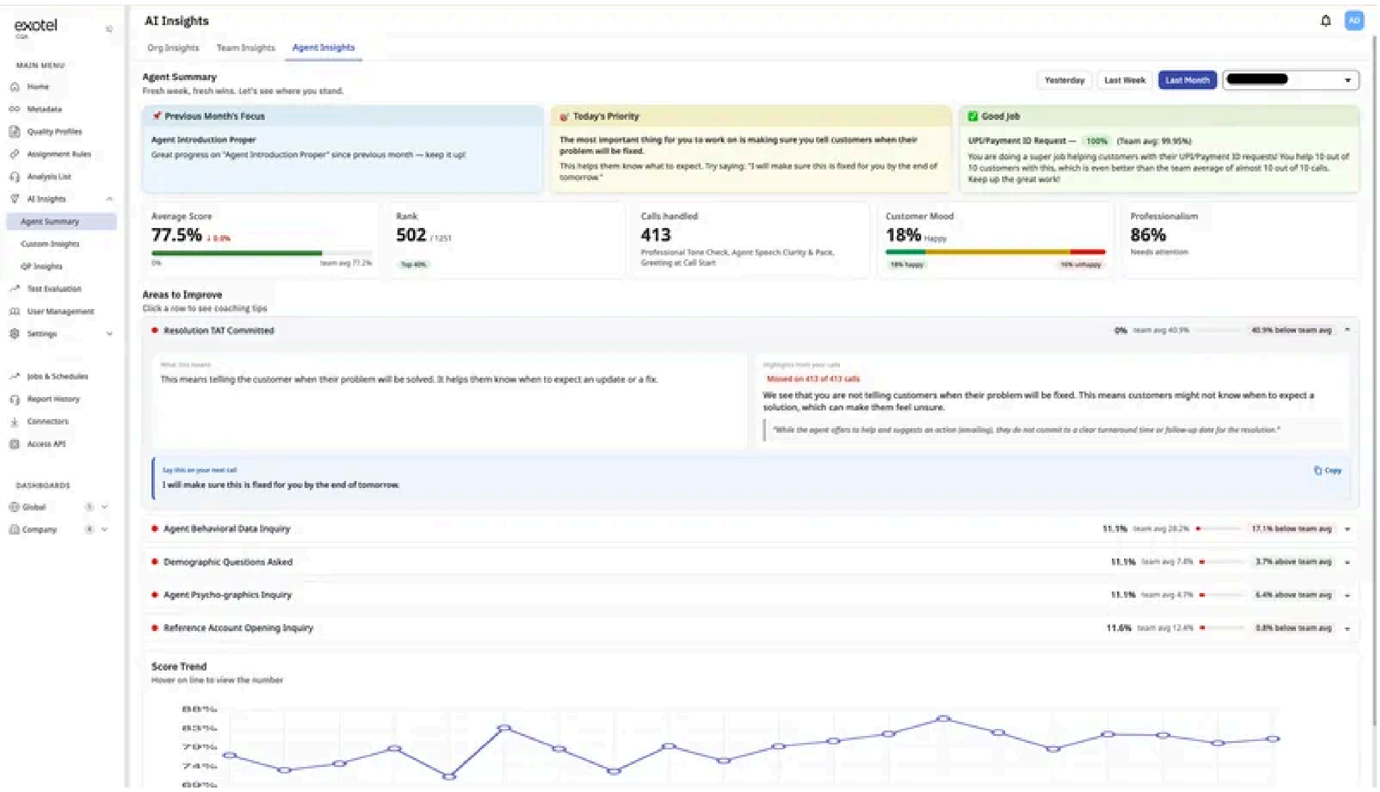
5.3.2. Team Insights (Supervisor)

Same pattern as Org Insights, scoped to the supervisor’s team: team priority / strength cards, team metrics, score distribution, and top/lowest performers.



5.3.3. Agent Insights (Agent)

Personalized view for the signed-in agent (supervisors/admins may also open a specific agent via picker where available).



Typical sections:

- Highlight cards (previous period focus, today's priority, strengths).

- Personal metrics (average score vs team, rank, calls handled, customer mood, professionalism).
- **Areas to improve** – expandable rows with what the check means, highlights from calls, and copyable “Say this on your next call” coaching lines.
- **Score trend** chart for the selected period.

5.3.4. Notes

- Summaries are AI-generated. The page shows **“AI-generated summary. May contain errors.”** Treat coaching as guidance and verify in Analysis List when needed.
- This page does not change Quality Profiles, Assignment Rules, or historical scores – it is a read-only insights surface.
- Sibling nav items such as **QP Insights** are separate capabilities and may have different enablement.

5.4. Workflow D: Reviewing QP Insights (AI Insights)

Goal: Compare Quality Profile performance portfolio-wide, then drill into one profile for AI coaching – coverage, score trends, weak/top KPIs, and priority insights.

Context: **QP Insights** is the Quality Profile lens under **AI Insights**. Use it alongside **Agent Summary** (agent lens) and the Analysis List (interaction lens).

```
Enablement: QP Insights is not enabled for every tenant by default. Contact your Customer Success Manager or Support to enable it for your account. You also need a role that can open QP Insights.
```

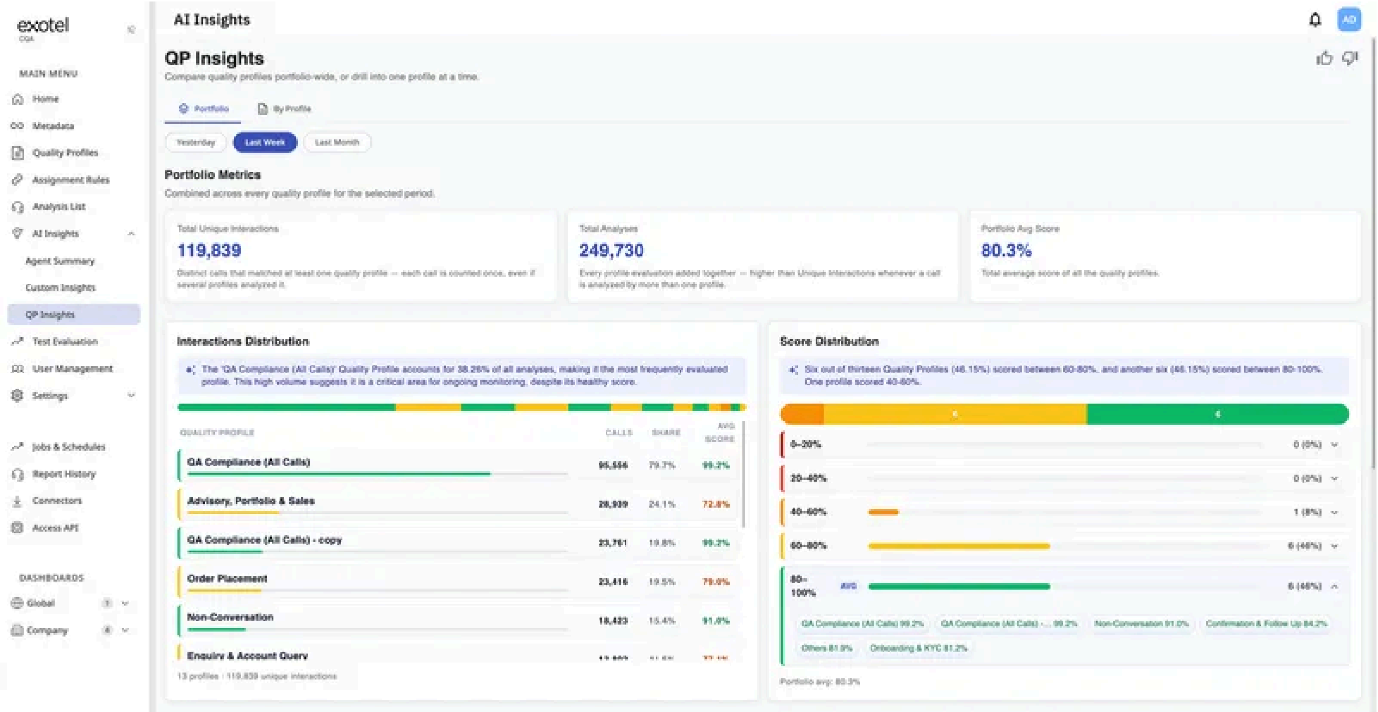
How to open: After enablement, go to **AI Insights → QP Insights**.

Product subtitle: Compare quality profiles portfolio-wide, or drill into one profile at a time.

Period filters: **Yesterday**, **Last Week**, or **Last Month**.

You can also give thumbs up/down feedback on the page to rate the AI summary.

5.4.1. Portfolio tab



Metric cards

Card	Meaning
Total Unique Interactions	Distinct calls matched to at least one Quality Profile in the period.
Total Analyses	Sum of every profile evaluation (can exceed unique interactions when one call is scored by multiple profiles).
Portfolio Avg Score	Average score across Quality Profiles.

Interactions Distribution

Table of Quality Profiles with calls, share of unique interactions, and average score — plus an AI insight callout summarizing volume mix (for example which profile drives the most analyses).

Score Distribution

Bands showing how many profiles fall into score ranges (for example 60–80%, 80–100%), with an AI insight summarizing the mix.

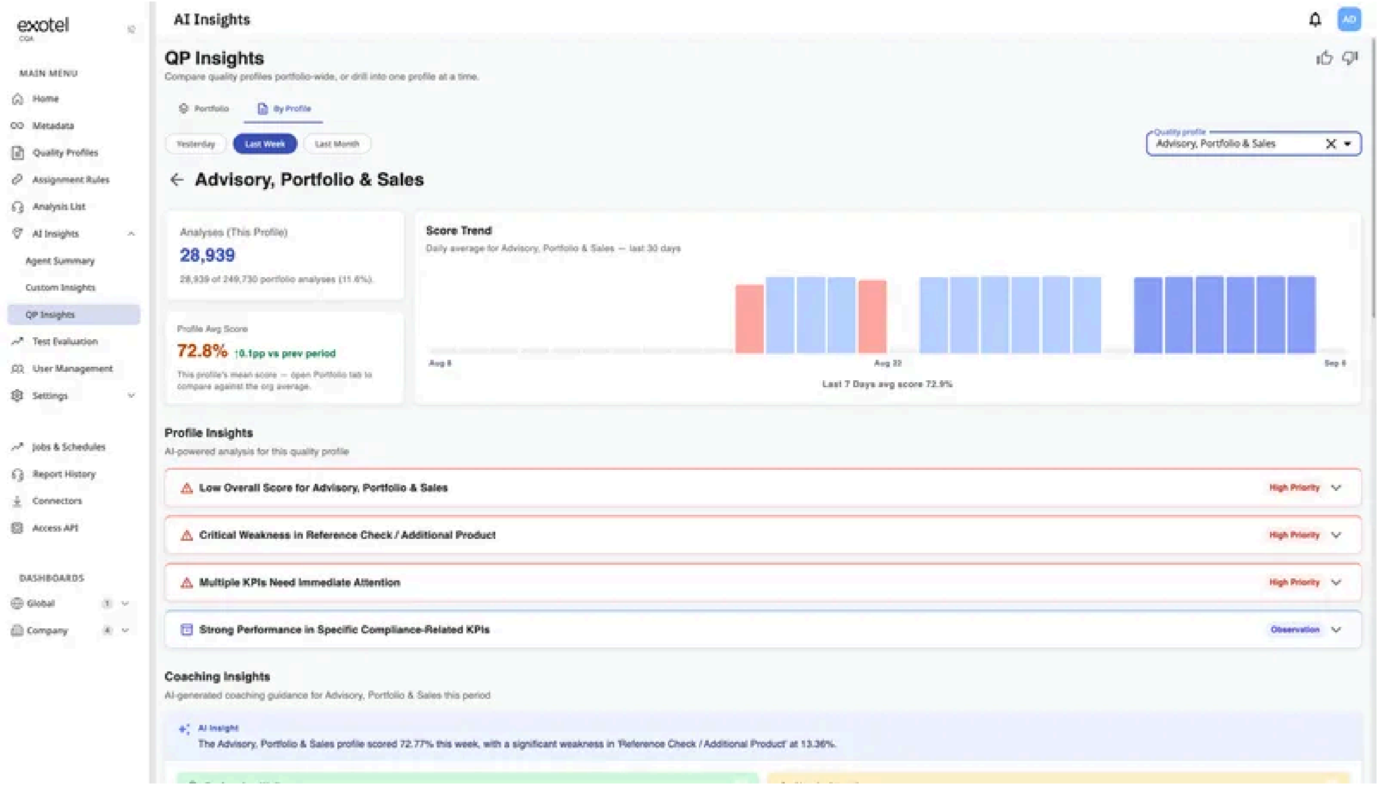
QP Health

Card grid per Quality Profile: overall score, period trend (pp), evaluation volume, KPI count, **Weak** KPI, and **Top** KPI. Use this to spot underperforming or high-volume scorecards quickly.

Portfolio Insights

Expandable AI findings across profiles (often tagged **High Priority**) — cross-QP patterns from health, volume mix, and score bands.

5.4.2. By Profile tab



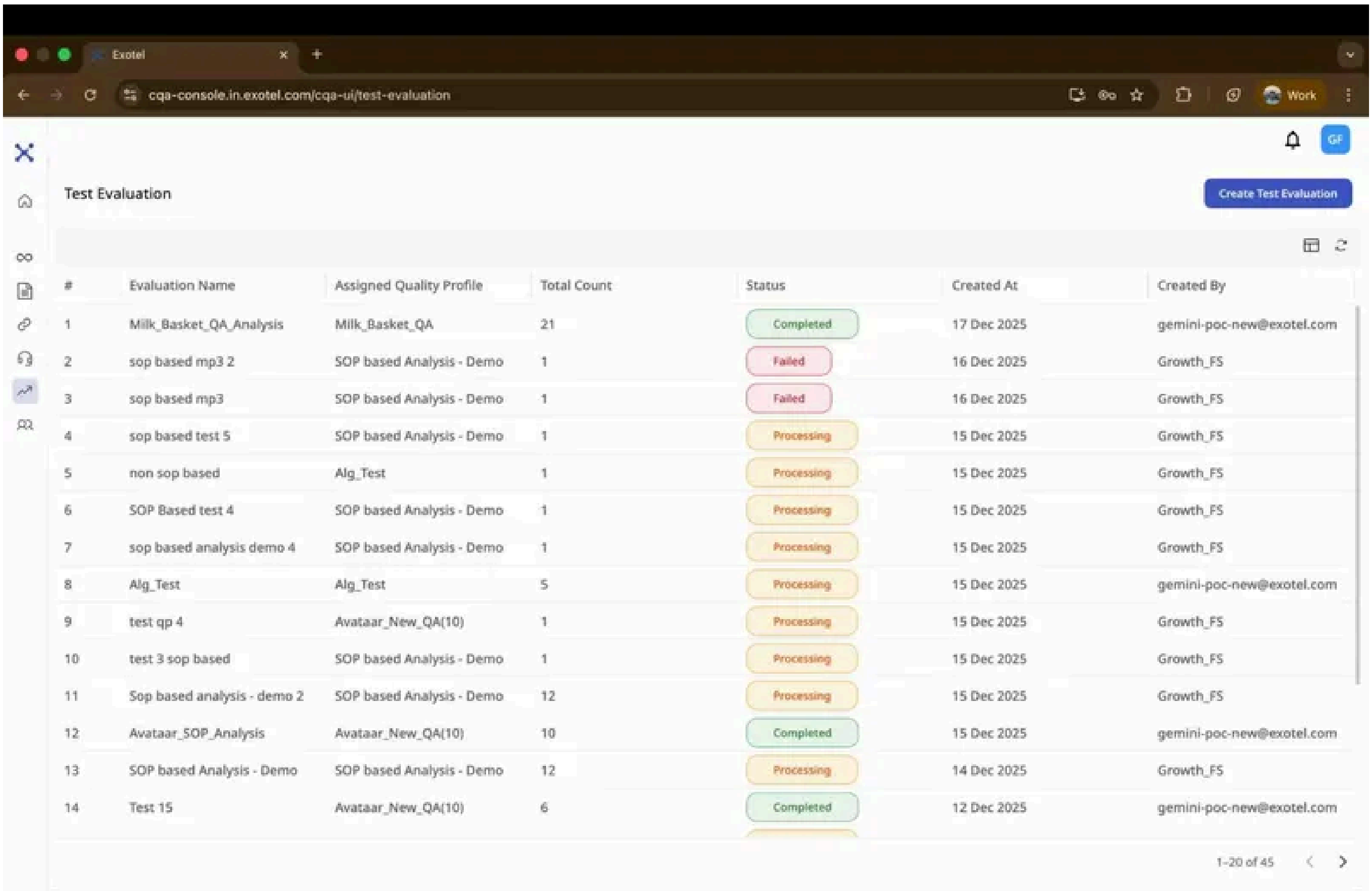
1. Select a Quality Profile from the picker.
2. Review **Analyses (This Profile)** – count and share of total portfolio analyses.
3. Review **Profile Avg Score** and period trend.
4. Use the **Score Trend** chart (daily averages for the recent window).
5. Open **Profile Insights** – severity-tagged items such as **High Priority** or **Observation** (expandable).
6. Read **Coaching Insights** – AI-generated coaching guidance for that profile and period.

5.4.3. Notes

- Summaries are AI-generated. The page shows **“AI-generated summary. May contain errors.”**
- This page does not change Quality Profiles or Assignment Rules – it is read-only analytics.
- Especially useful when **Smarter Assignment** routes traffic across many profiles – Portfolio distribution makes unused or overloaded scorecards visible.

5.5. Workflow E: 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.



Steps:

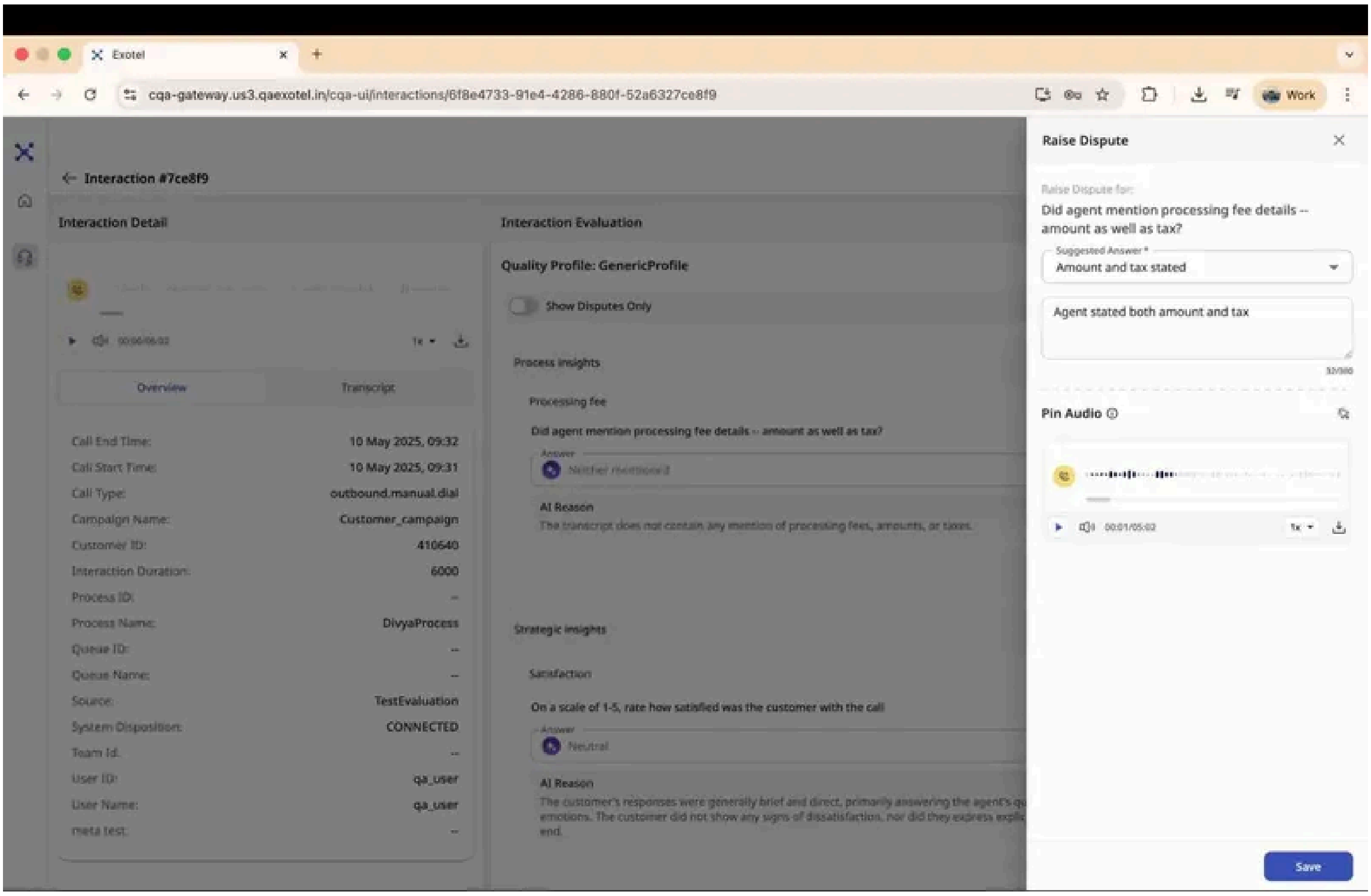
1. **Navigate:** Click **Test Evaluation** in the sidebar.
2. **Create New:** Click the button to start a new test.
3. **Configuration:**
   - **Name:** Give your test a unique name (e.g., "Oct Sales Audit").
   - **Select Profile:** Choose the **Quality Profile** you wish to test.
4. **Upload Data:**
   - 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.

5.6. Workflow F: 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.

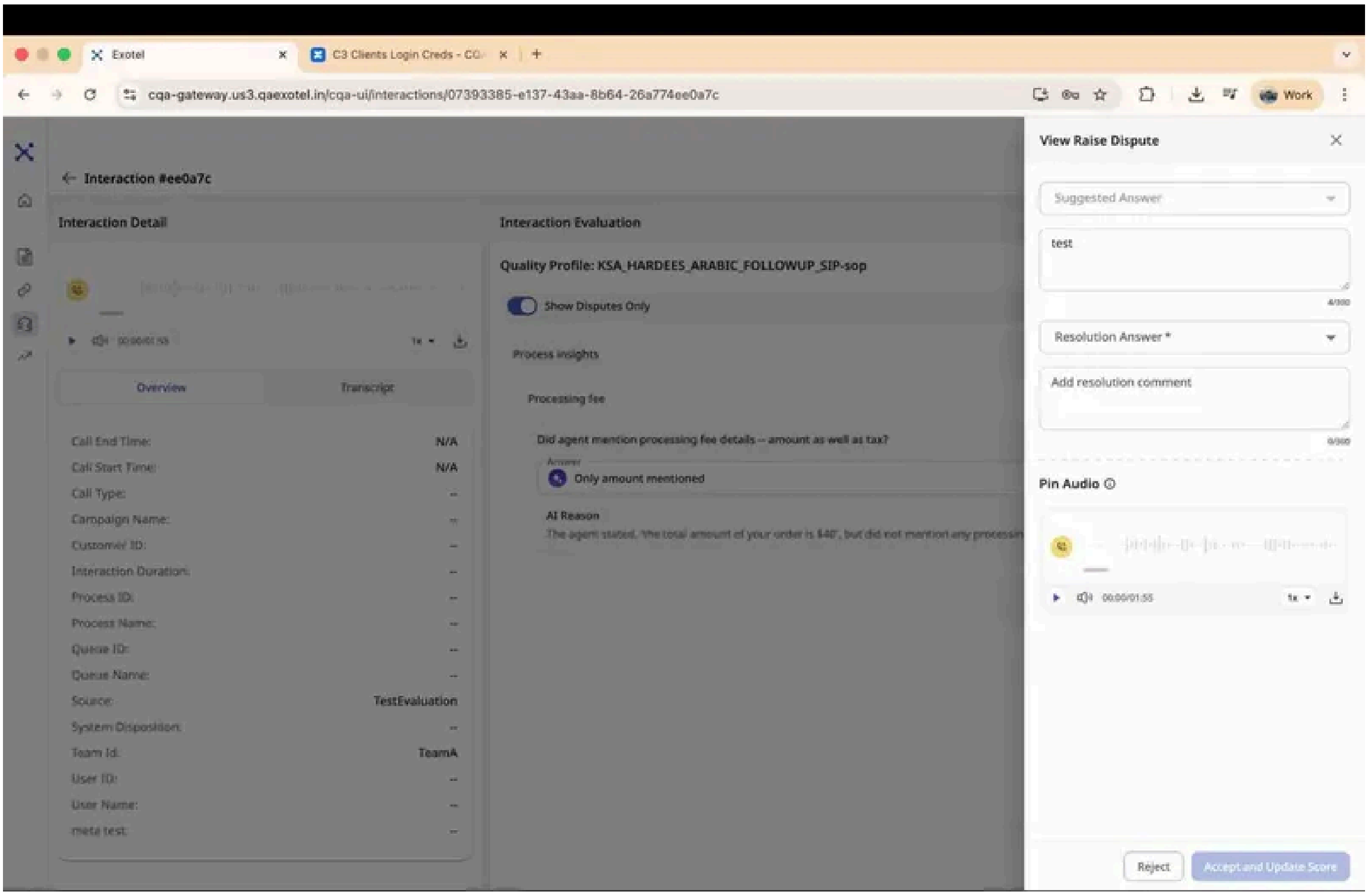


2. Resolving a Dispute (Supervisor Action)

- 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.

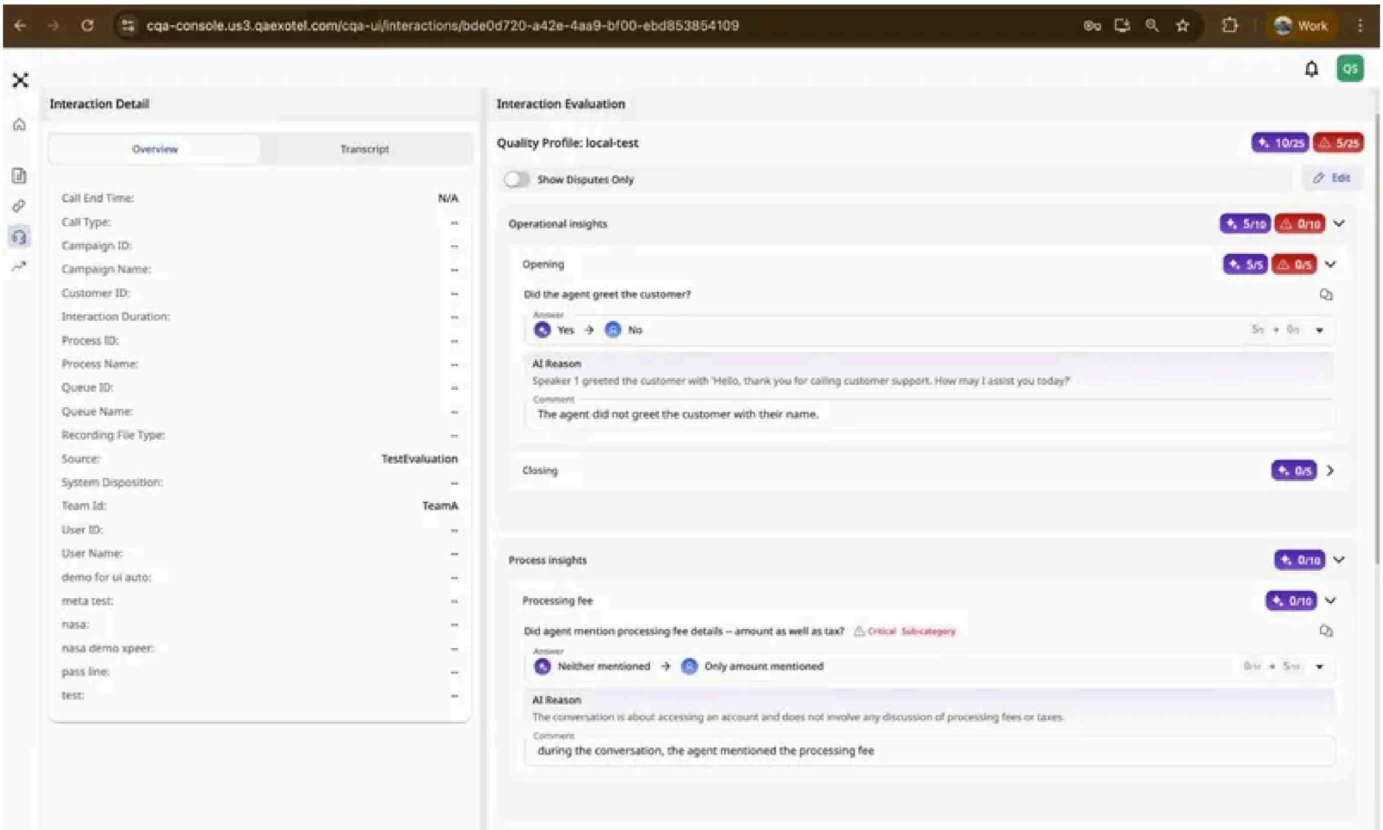


5.7. Workflow G: Manual Review and Edit

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.



Filter & Search: Use the filter bar to isolate specific interactions. You can filter by Date, Score, Quality Profile, Metadata (e.g., "Show me calls from Campaign A"), and **Interaction Type**.

Interaction Type lets you narrow the list to interactions that need attention:

Value	What you see
Disputed Interactions	Interactions with open or relevant disputes (same pattern as before).
Critical KPI Failures	Interactions where at least one **Critical** KPI failed evaluation (per Quality Profile criticality settings).

1.5. Data Integrations

6.0. Integrations Overview & Decision Guide

Overview

CQA delivers value by analyzing conversations. To do this, it needs access to call recordings and their associated metadata (agent name, campaign ID, team name, and similar fields).

CQA supports various integration methods to ingest data from different telephony systems, CRMs, and storage solutions – and to export analysis results to external destinations.

Once your account is onboarded (tenant created, users configured, quality profiles and assignment rules set up), data ingestion and analysis occur automatically.

Why Integrations Matter

CQA's value comes from analyzing your conversations. To do this automatically, it needs:

1. **Call recordings** (audio files or transcripts)
2. **Metadata** (agent ID, campaign, team, queue, etc.)
3. **A reliable way to move data** from your system into CQA

Integrations are the pipes that deliver this data on schedule, with minimal manual effort.

How CQA Processes Data: The Three-Step Flow

Regardless of which integration you choose, CQA follows the same workflow:

STEP 1: INGEST

- Your system → CQA (via SFTP, S3, API, or native integrations)
- CQA retrieves recordings and metadata on your schedule

STEP 2: ANALYZE

- CQA applies your Quality Profile & Assignment Rules
- AI scores the interaction

STEP 3: STORE & EXPORT

- Results appear in CQA Analysis List
- Optionally: push scores back to your system (S3, SFTP, API)

Key Concepts

- **Connector:** A saved connection to a data source or destination (e.g., "Production S3" or "Support SFTP"). Created once, reused for multiple jobs.
- **Job:** A scheduled task that uses a connector to move data. Examples: "Daily S3 import at 2:30 AM IST" or "Weekly email report to leadership."
- **Metadata:** Structured data attached to every conversation (agent name, campaign, duration, queue, region). CQA uses this to route conversations to the right Quality Profile and to filter/report results.
- **Assignment Rule:** Logic that says: "If metadata matches X condition, use Quality Profile Y." Automation happens here.

Before You Start: Shared Prerequisites

All integration paths require:

1. ✅ **CQA tenant and user accounts created** – Coordinate with your CSM
2. ✅ **Quality Profiles configured** – Define what you want to score (see §4.2)
3. ✅ **Assignment Rules configured** – Define which conversations get analyzed (see §4.3)

Without these, integrations have nothing to do.

Choose Your Integration Path

- **Exotel Ecosystem Integrations** (§6.1) – for customers on ECC 4X, ECC 6X, or Exolite platforms.
- **Universal & External Integrations** (§6.2) – for customers connecting via SFTP, Amazon S3, email, or the Standard API.
- **Quick Comparison** (§6.3) – see a table of all integration paths with capabilities and latency.

6.1 Exotel Ecosystem Integrations

For customers using Exotel's proprietary platforms (ECC 4X, ECC 6X, Exolite).

6.1.1 ECC 4X

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.

What you get:

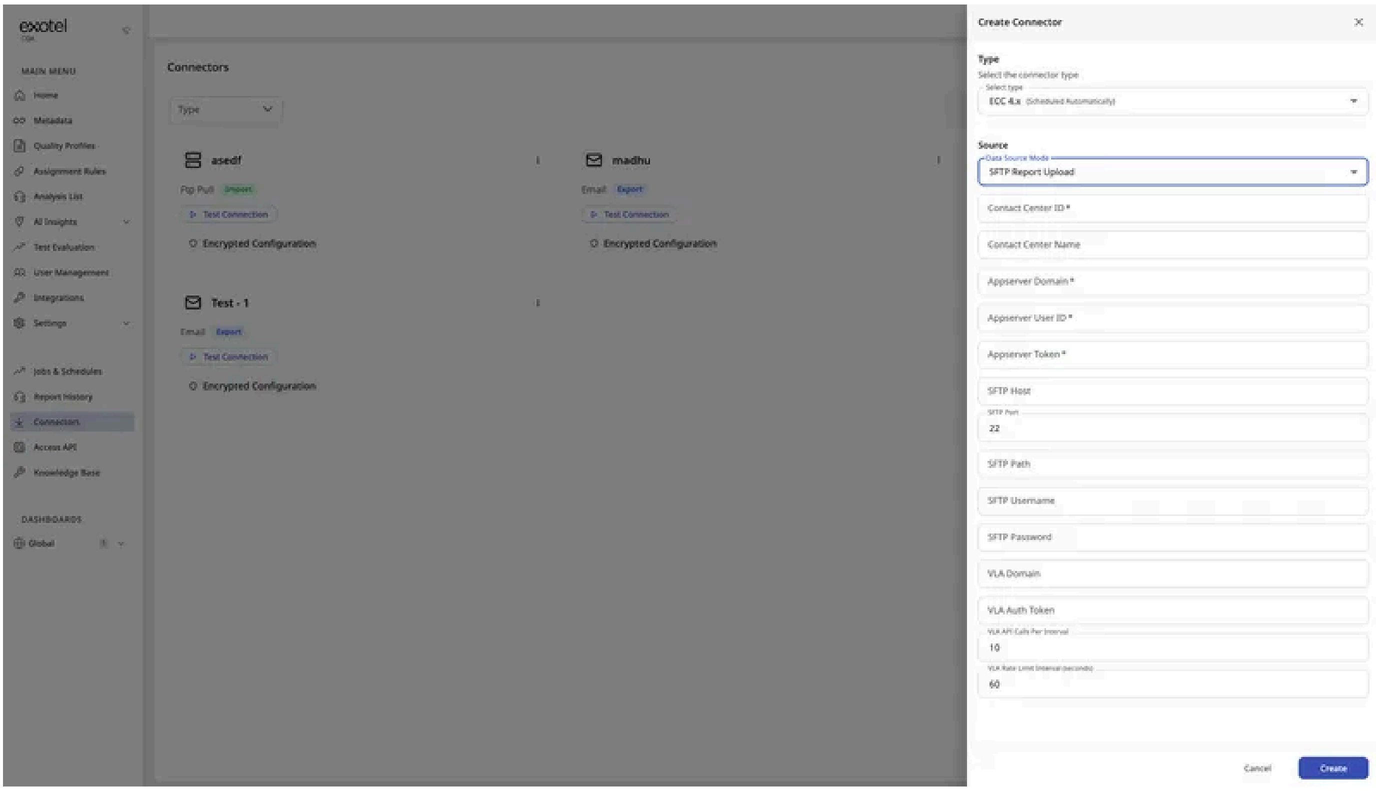
- CQA fetches call recordings and metadata automatically on a daily basis
- Conversations appear in the CQA Analysis list for review
- Results stay in CQA; use export connectors (SFTP, S3, Email) or the Standard API to send scores elsewhere
- If CQA is directly enabled within ECC 4X as an iframe – results are visible without needing to log into the CQA console separately

How data flows: The ECC VLA module generates and uploads a call report to CQA's server (S3) via SFTP. CQA uses call SIDs from that report to fetch audio recordings.

Prerequisites:

- Shared prerequisites above
- Report Scheduler must be enabled on your ECC 4X setup for CQA to get access to your call metadata.
- VLA module must be enabled on your ECC 4X setup for CQA to get access to your recordings.
- **On-premise requirement:** Whitelist the CQA IP address, and set VLA server on public domain

Setup steps:



1. Confirm quality profiles and assignment rules cover the traffic you want analyzed
2. If the console is enabled: go to **Connectors** → **Create Connectors** → **Import Connector** → select type **ECC 4X** → data source mode **SFTP Report Upload** --> fill in platform-specific fields → **Create** → **Test connection**
3. After the connector is saved, click **Test Trigger** to run a one-time test pull and analysis against the currently saved connector configuration (see below). You do not need to wait for the daily schedule.
    - Note: The trigger will return an error if there is no file to analyze.
4. The import job is scheduled automatically when the connector is created (you do not need to manually create a separate job in Jobs & Schedules)
5. If the console is not enabled, ask your CSM or CQA Support to create the connector

Verify it's working:

1. Identify a recent call from your ECC 4X system that matches your assignment rules
2. Wait for the next daily import (runs at approximately 2:30 AM IST)
3. Open **Analysis List** and confirm the conversation appears with a score

Test connection vs Test Trigger

Action	What it validates
Test connection	Reachability and authentication for the connector (can CQA talk to the source?).
Test Trigger	End-to-end setup: CQA pulls from the configured path, processes the file, and runs analysis.

6.1.2 ECC 6X

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

What you get:

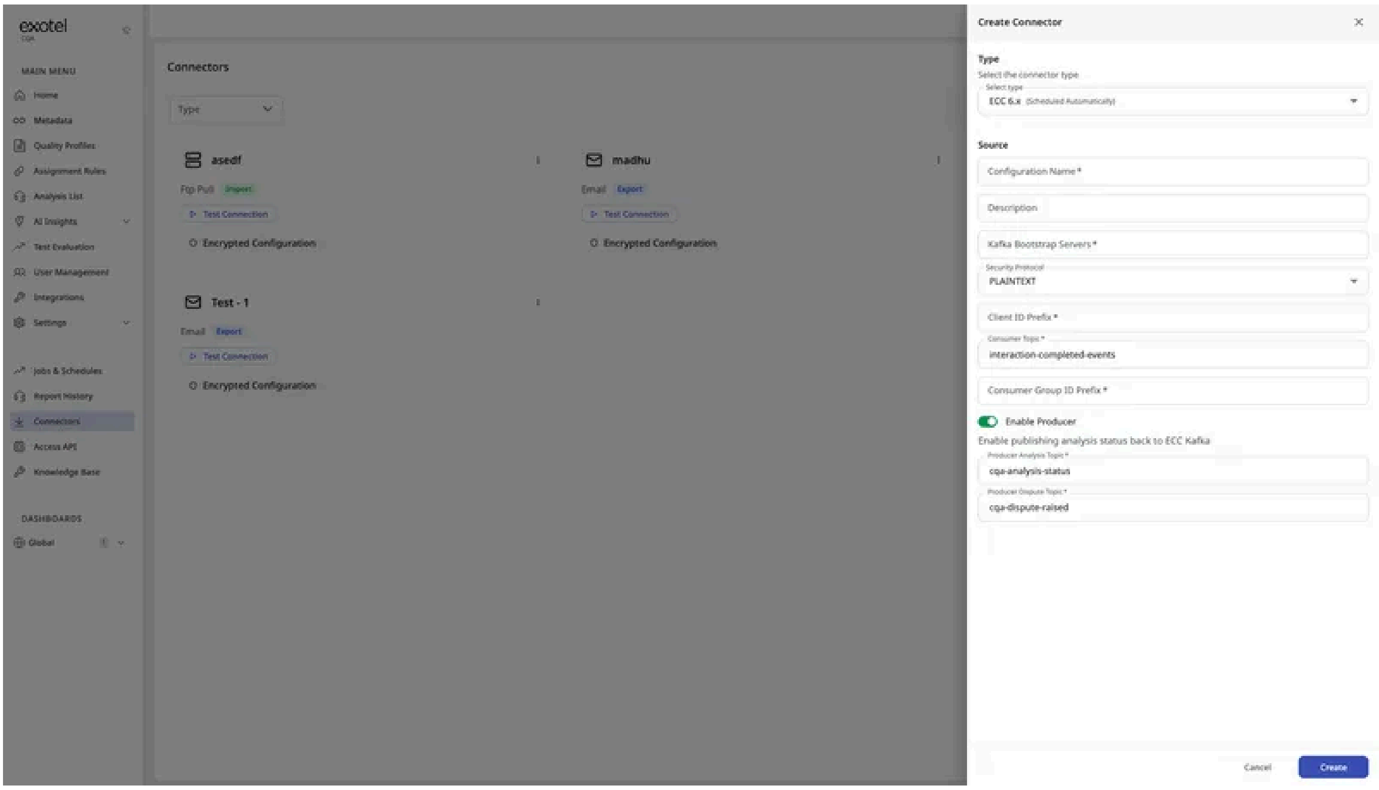
- CQA receives conversations as they become available (near real time), not just once a day
- After analysis, CQA can automatically send scores and results back into ECC. Use export connectors (SFTP, S3, Email) or the Standard API to send scores elsewhere
- Users logged into ECC 6X can view the scores and analysis results directly within ECC without needing to log into the CQA console separately
- Conversations also appear in the CQA Analysis list

How data flows: CQA consumes conversations from the ECC Kafka stream in real time and automatically publishes scores and results back into the pipeline for ECC to consume.

Prerequisites:

- Shared prerequisites above
- **On-premise requirement**: Whitelist the CQA IP address so CQA can listen to your ECC Kafka servers

Setup steps:



1. Confirm quality profiles and assignment rules cover the traffic you want analyzed
2. If the console is enabled: go to **Connectors** → **Create Connectors** → **Import Connector** → select type **ECC 6X** → fill in platform-specific fields → **Create** → **Test connection**
3. The import job is scheduled automatically when the connector is created (you do not need to manually create a separate job in Jobs & Schedules)
4. If the console is not enabled, ask your CSM or CQA Support to create the connector

Verify it's working:

1. Complete (or identify) an eligible call in ECC 6X
2. Within a short window, open **Analysis** in CQA and confirm the conversation is present and scored
3. Confirm the scored result is visible where your ECC 6X workflows expect it.

6.1.3. Exolite Platform

Teams on standard Exolite who want CQA analysis with minimal integration work, and are comfortable viewing results in CQA or exporting them separately.

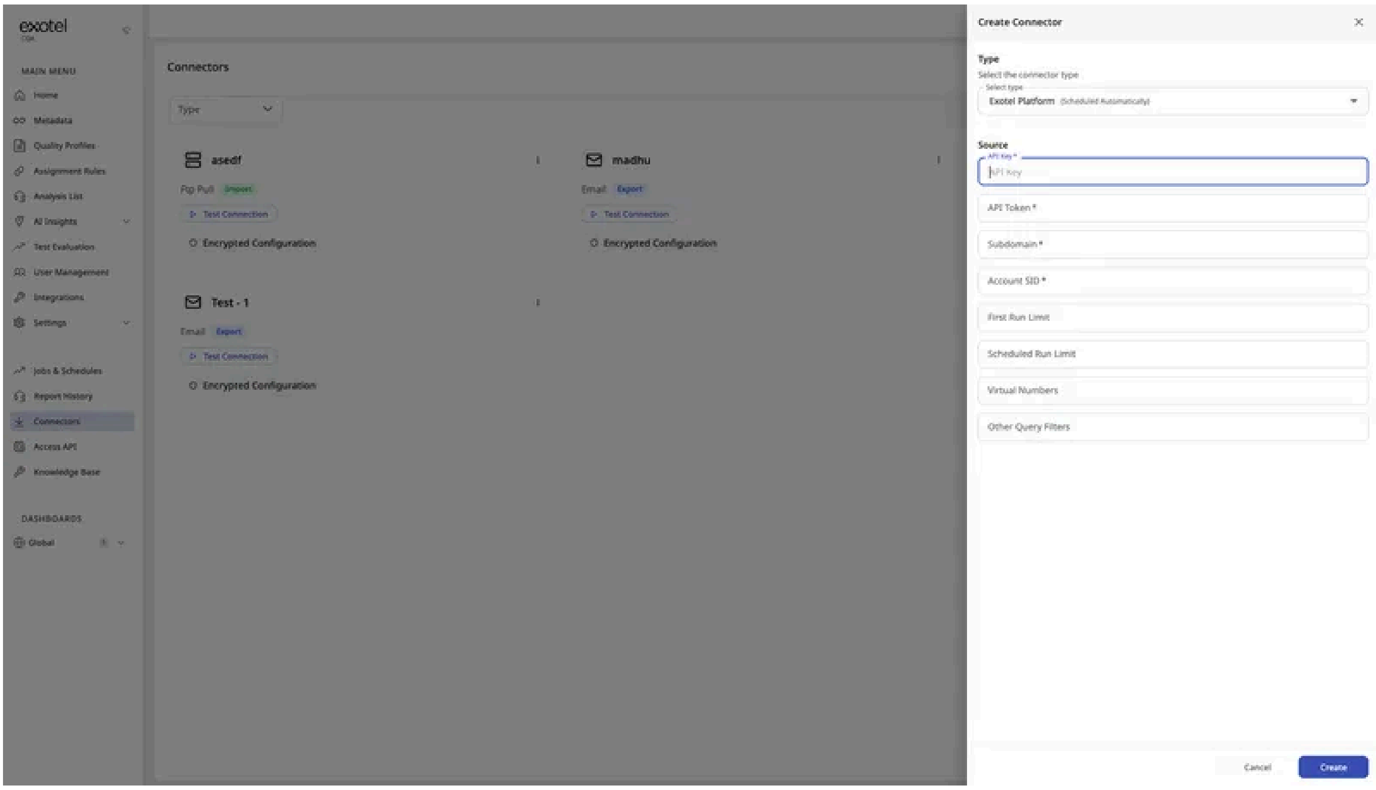
What you get:

- CQA automatically fetches Exolite call recordings and metadata on a daily basis
- Conversations appear in the CQA Analysis list (accessible via a separate CQA URL)
- Results stay in CQA; use export connectors or the API to send scores elsewhere

How data flows: CQA retrieves recordings daily using Exolite's bulk call API.

Prerequisites: Shared prerequisites above

Setup steps:



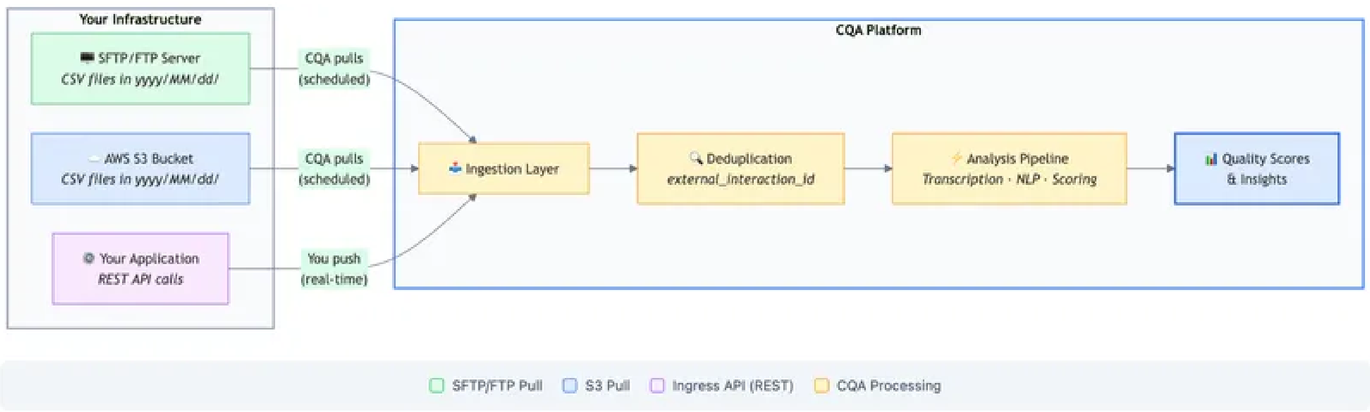
1. Confirm quality profiles and assignment rules cover the traffic you want analyzed
2. If the console is enabled: go to **Connectors** → **Create Connectors** → **Import Connector** → select type **Exotel Platform** → fill in platform-specific fields → **Create** → **Test connection**
3. The import job is scheduled automatically when the connector is created (you do not need to manually create a separate job in Jobs & Schedules)
4. If the console is not enabled, ask your CSM or CQA Support to create the connector

Verify it's working:

1. Identify an eligible recent call from Exolite
2. Wait for the next daily import (runs at approximately 2:30 AM IST)
3. Confirm the conversation appears in **Analysis List** with a score

6.2. Universal & External Integrations

For customers connecting via self-hosted SFTP, Amazon S3, email, or the Standard API. These paths support both **data import** (getting calls in) and **data export** (sending results out).



If the Data Integration Console is enabled, these connectors can be created and managed from the UI.

6.2.1. Standard API

CQA provides a Standard API designed to make the platform agnostic. This allows building a custom integration from any CCaaS, CRM, or middleware that can call REST APIs and for pulling scores back into your own systems.

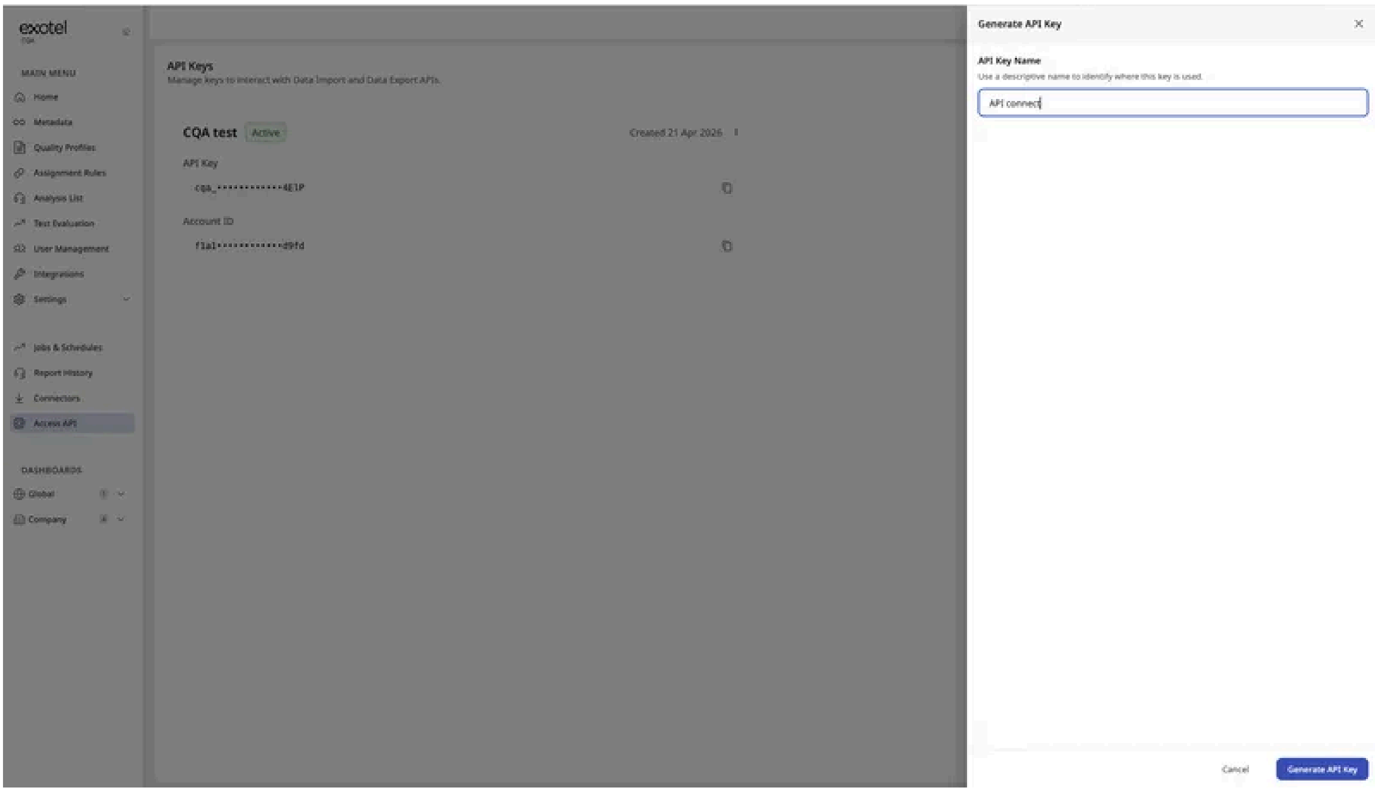
What you get:

- **Ingestion:** Your system pushes conversations to CQA using the Standard API (single, batch, or file endpoints)
- **Export:** Your system pulls scores, parameters, and related analysis fields back out via the same API
- For external platforms (e.g., Genesys, Salesforce), a middleware layer to be built that typically reads the source system, maps fields to the CQA schema, and pushes/pulls via the API
- **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.

Prerequisites:

- Shared prerequisites above
- An API key (from **Access API** section in the integration console, or requested from your CQA administrator)
- Integration middleware that follows the request schema in the API Reference Guide
- Audio/Chat URLs in your request must be publicly accessible or use pre-signed URLs (so CQA can fetch the recordings)

Setup steps:



1. Generate an `API key` and `Account ID` under **Access API** -> **New API Key**
2. Implement push of conversations per the API Reference Guide (single, batch, or file endpoints)
3. Implement pull of scores and results the same way. Refer to the API Reference Guide for fields, auth, and limits

Verify it's working:

1. Push a test conversation with a unique external_interaction_id
2. Confirm a success response from the API
3. Open **Analysis List** and confirm the conversation appears after processing
4. Pull the analysis result back and confirm it matches what you see in CQA

```
Note: The Standard API can be used by customers or professional services teams to build middleware 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.

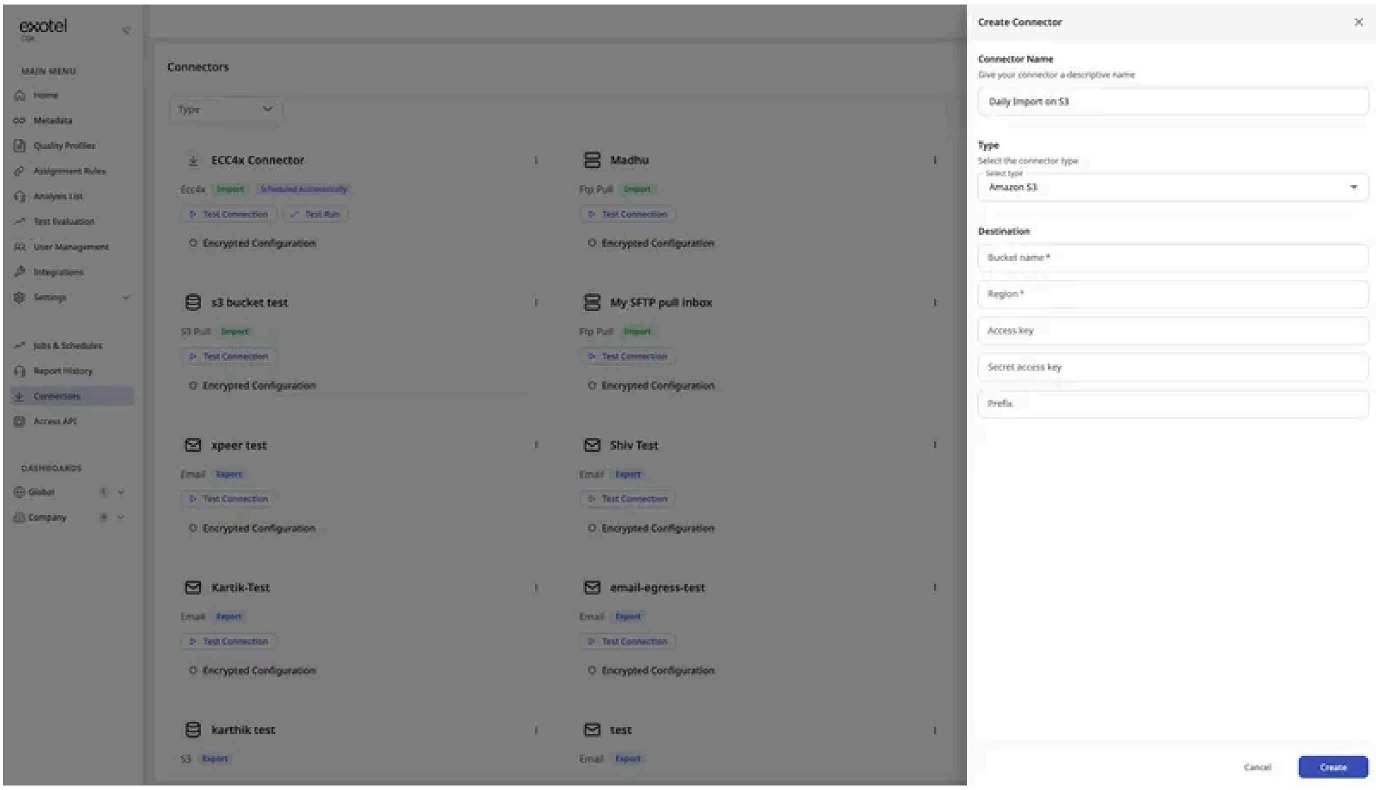
What you get:

- **Ingestion:** CQA authenticates to your bucket, pulls CSV files (and downloads recordings from the URLs in the CSV), and analyzes eligible conversations on your job schedule
- **Export:** CQA can push analysis reports (CSV or Excel) to a bucket you own on a configured schedule.

Prerequisites:

- Shared prerequisites above
- Audio URLs in your CSV must be publicly accessible or use pre-signed URLs (so CQA can fetch the recordings)

Setup steps:



1. For import:
    - Prepare a sample CSV using the API Reference – CSV Schema and upload it (with reachable recording URLs) to your S3 bucket
    - **Connectors** → **Create Connectors** → **Import Connector** → select type **Amazon S3** → fill in platform-specific fields → **Create** → **Test connection**
    - **Jobs & Schedules** → **Create Job** → job type **Data Import** → Source Connectors **<select the S3 connector created in the previous step>** -> fill in details → **Create**
2. For export:
    - **Connectors** → **Create Connectors** → **Export Connector** → select type **Amazon S3** → fill in platform-specific fields → **Create** → **Test connection**
    - **Jobs & Schedules** → **Create Job** → job type **Data Export** → Destination Connectors **<select the S3 connector created in the previous step>** -> fill in details → **Create**
3. If the console is not enabled, ask your CSM or CQA Support to create the connectors

Verify it's working:

1. Confirm **Test connection** succeeded
2. For ingestion: confirm the conversation appears in **Analysis List**.
3. For export: confirm the file lands in your destination bucket

6.2.3. Customer SFTP

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

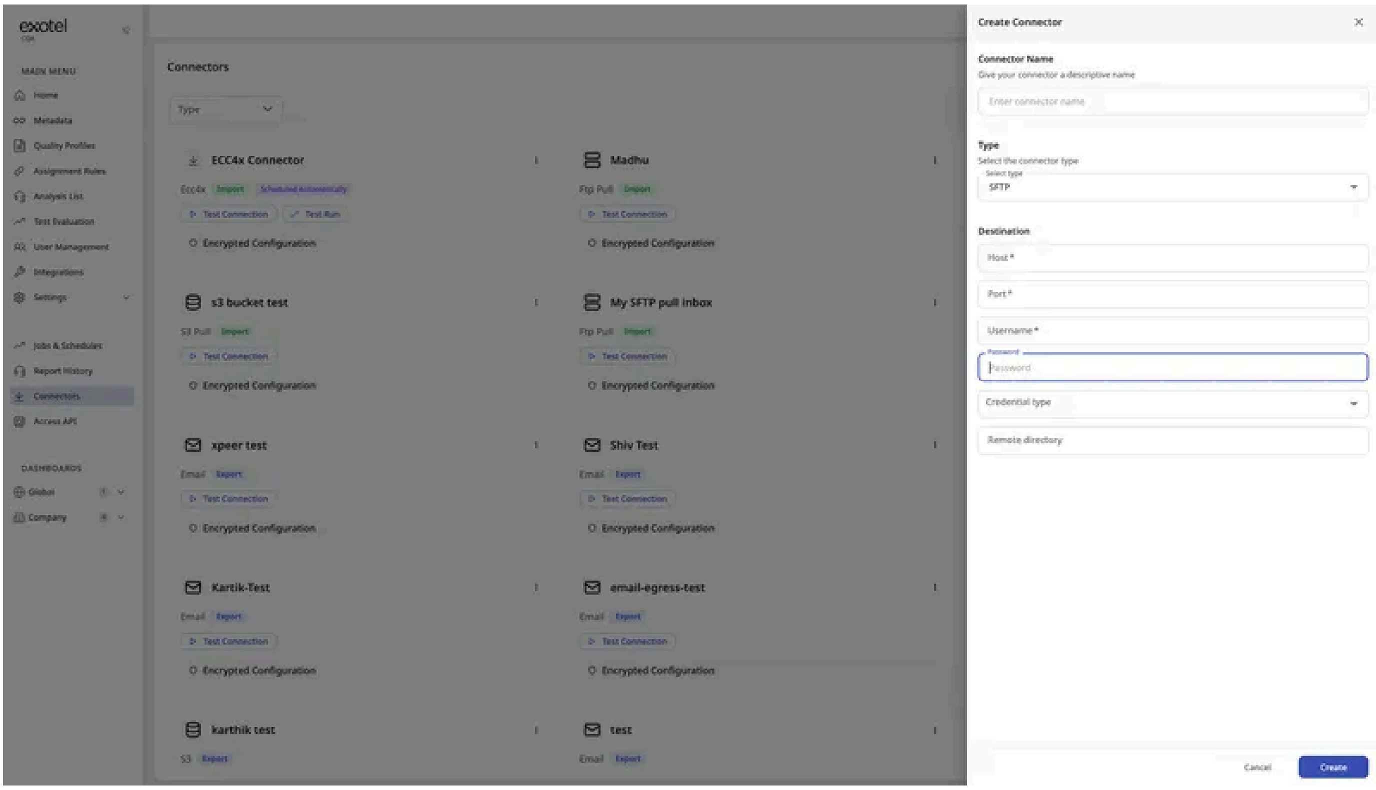
What you get:

- **Ingestion:** CQA connects to your SFTP server, pulls CSV files (and downloads recordings from the URLs in the CSV), and analyzes eligible conversations on your job schedule
- **Export:** CQA can push analysis reports (CSV or Excel) to your SFTP server on a configured schedule.

Prerequisites:

- Shared prerequisites above
- Audio URLs in your CSV must be publicly accessible or use pre-signed URLs (so CQA can fetch the recordings).
- Alternatively, audio files can be accessed via SSH from your SFTP server

Setup steps:



1. For import:
    - Prepare a sample CSV using the API Reference – CSV Schema and upload it (with reachable recording URLs) to your SFTP server
    - **Connectors** → **Create Connectors** → **Import Connector** → select type **SFTP** → fill in platform-specific fields → **Create** → **Test connection**
    - **Jobs & Schedules** → **Create Job** → job type **Data Import** → Source Connectors **<select the SFTP connector created in the previous step>** -> fill in details → **Create**
2. For export:
    - **Connectors** → **Create Connectors** → **Export Connector** → select type **SFTP** → fill in platform-specific fields → **Create** → **Test connection**

    - **Jobs & Schedules** → **Create Job** → job type **Data Export** → Destination Connectors **<select the SFTP connector created in the previous step>** -> fill in details → **Create**
3. If the console is not enabled, ask your CSM or CQA Support to create the connectors
4. Credential types:
    - Username/Password: Standard credential-based authentication.
    - SSH Public Key: A more secure alternative to passwords. Contact CQA Support to set up, we handle key pair generation and guide you through the SFTP configuration.

Verify it's working:

1. Confirm **Test connection** succeeded
2. For ingestion: confirm the conversation appears in **Analysis List**.
3. For export: confirm the file lands in your destination bucket

6.2.4. Email Export

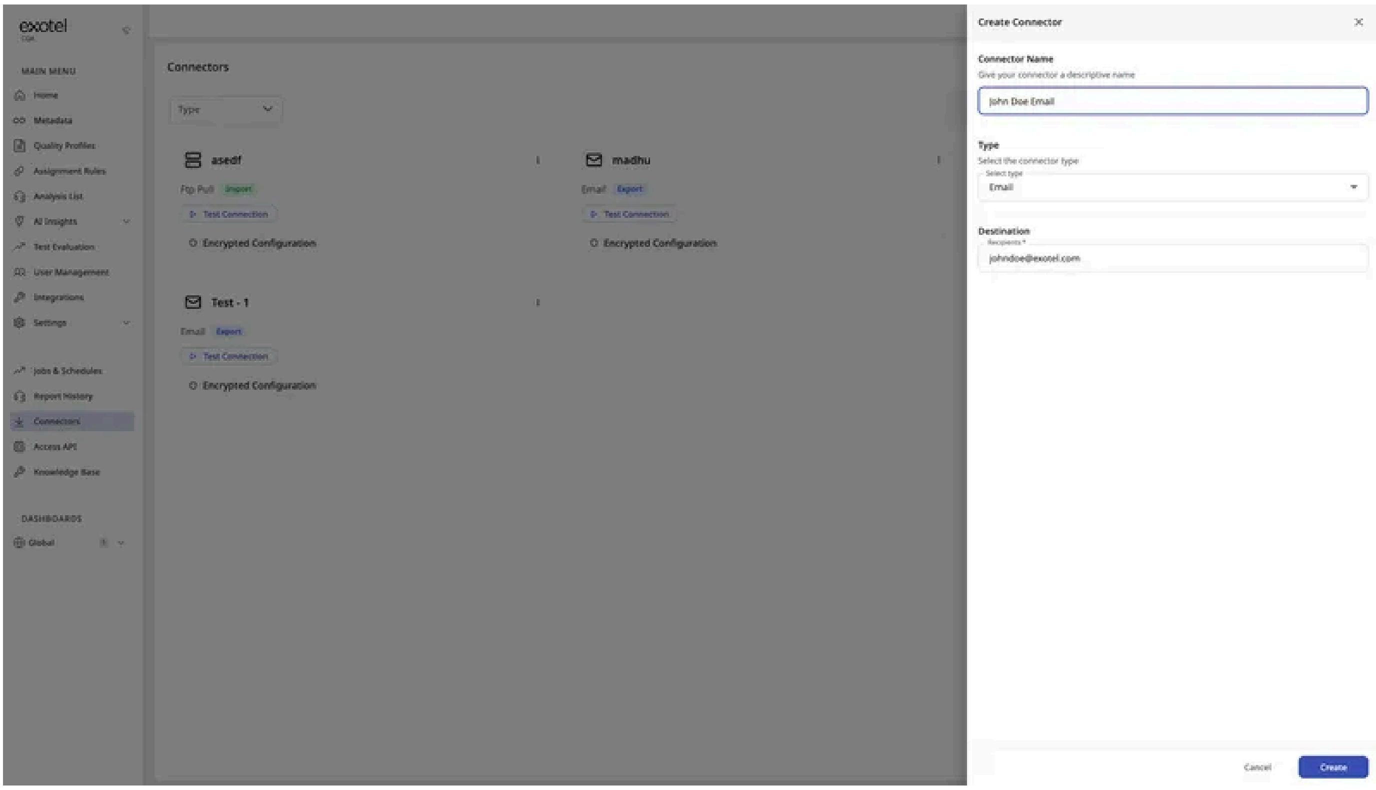
CQA supports exporting scheduled or one-off analysis reports delivered straight to an inbox.

What you get:

- Export only – email cannot ingest calls into CQA
- CQA generates a report (CSV or Excel) and emails a **download link** (the file itself is not attached)
- Each file is limited to **10,000 rows**; larger reports include multiple links
    - If needed, multiple files can be compressed into a single zip file and shared as a single link in the email.
    - Reach out to your CSM/CQA team to enable this functionality by default.
- Download links remain valid for **7 days**
- You can also trigger a one-time email export directly from the **Analysis** List without setting up a recurring job.

Prerequisites: Shared prerequisites above

Setup steps:



1. **Connectors** → **Create Connectors** → **Export Connector** → select type **Email** → fill in platform-specific fields → **Create** → **Test connection**
2. **Jobs & Schedules** → **Create Job** → job type **Data Export** → fill in details → **Create**
3. If the console is not enabled, ask your CSM or CQA Support to create the connector

Verify it's working:

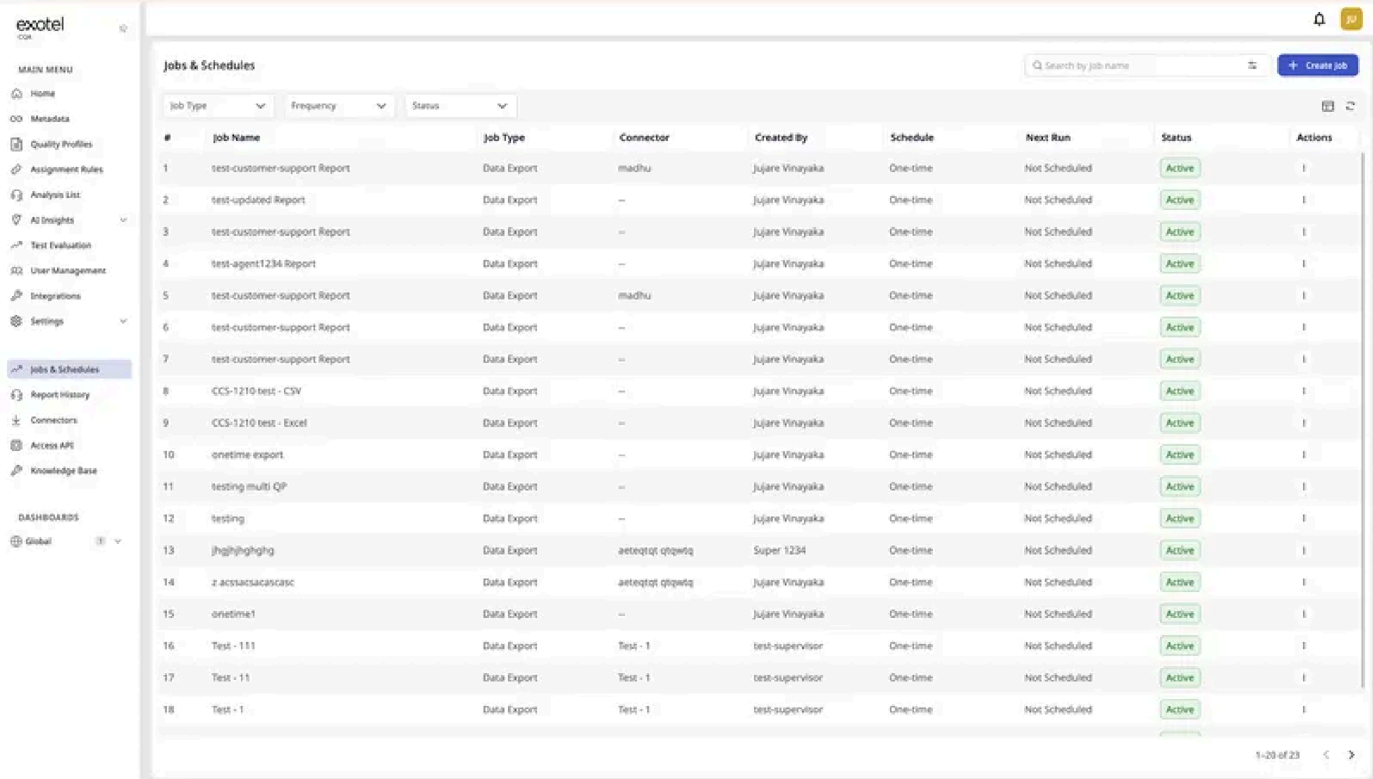
1. Confirm the download-link email arrived and the link works

6.3. Summary of Integration Capabilities

Integration Type	Ingress	Egress	Console Support
ECC 4X	✅	❌	Yes (auto-scheduled)
ECC 6X	✅	✅	Yes (auto-scheduled)
Exolite Platform	✅	❌	Yes (auto-scheduled)
Customer SFTP	✅	✅	Yes
Customer S3	✅	✅	Yes
Email	✅	✅	Yes
Standard API	✅	✅	Access API page

6.4. Jobs & Schedules

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



Creating a job:

1. Navigate to **Jobs & Schedules** 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 **+ Create 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**: Hourly, 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**.

Job actions:

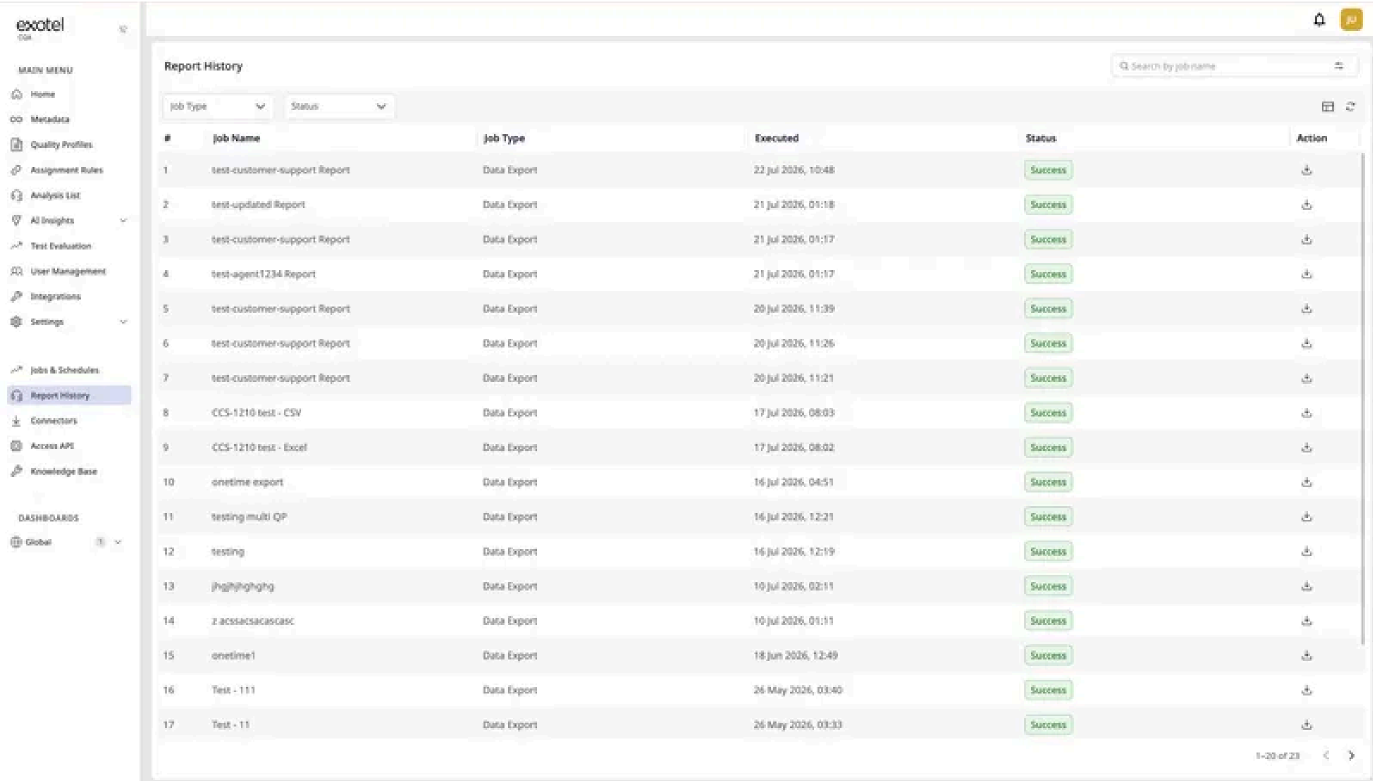
- **Trigger**: Manually run a job immediately using the play button, regardless of its schedule. Useful when a scheduled pull missed the file (e.g., the CSV was uploaded after the scheduled time) and you want to retry immediately.
- **Disable**: Temporarily pause a scheduled job without deleting it (e.g., 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 & Schedules table, but you do not need to create or trigger it manually.

6.5. Report History

Track all job runs with their outcomes.



1. Navigate to **Report 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

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://cqa-console.in.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.
CONVERSATION_CAP_EXCEEDED	429	Account conversation cap exceeded. Daily, weekly, or monthly interaction limit reached.

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, transcript_text must be provided.

> **NOTE**: These URLs (audio_url, transcript_url) must be publicly accessible or use pre-signed URLs (so CQA can fetch the recordings)

Parameter Name	Mandatory / Optional	Type	Description
external_interaction_id	Mandatory	string	Your unique identifier for this interaction. Used for deduplication. Interaction with the same ID will be rejected.
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 or transcript_text is not provided	string	Direct URL to the audio recording.
transcript_url	Mandatory if audio_url or transcript_text is not provided	string	Direct URL to the transcript file.
transcript_text	Mandatory if neither audio_url nor transcript_url is provided	string	Inline transcript/conversation text. If both transcript_text and transcript_url are sent, transcript_url wins (inline text is ignored). Max 100 KB (UTF-8).
pii_redacted	Optional	boolean	Whether PII has already been redacted in the provided content. Default: `false`. If you have already redacted PII either by your own means or using the CQA provided capability , set this parameter as true (used internally to skip PII redaction again)
metadata	Optional	object	Arbitrary key-value pairs for tagging. Maximum 50 keys. Values can be strings, numbers, or booleans.

Example Request (VOICE)

URL input - Voice Call:

```
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"
    }
  }'
```

Example Request (CHAT with URL)

```
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": "chat-2026-04-01-001",
    "channel_type": "CHAT",
    "source": "whatsapp",
    "language": "en",
    "interaction_start_time": "2026-04-01T10:30:00Z",
    "transcript_url": "https://storage.example.com/messages/chat-001.txt"
  }'
```

Example Request (CHAT with transcript_text)

```
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": "chat-2026-09-03-001",
    "channel_type": "CHAT",
    "source": "web-chat",
    "language": "en",
    "transcript_text": "Agent: Hello! How can I help you today?\nCustomer: I need to reset my password.\nAgent: 
Sure, I can help with that. Let me send you a reset link."
  }'
```

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"
  }
}
```

429 Too Many Requests -- **Conversation cap exceeded.**

```
{
  "status": 429,
  "request_id": "req-abc-126",
  "message": "Daily conversation cap exceeded: 50/50",
  "error": {
    "code": "CONVERSATION_CAP_EXCEEDED"
  }
}
```

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 (audio_url or transcript_url or transcript_text [max 100 KB / 102400 bytes]) as the single ingest endpoint. Minimum 1, maximum 100.

```
Note: transcript_text is supported in batch items. Each item can include at most 100 KB (102400 bytes) of
transcript_text. If any batch item exceeds this limit, the entire batch request is rejected immediately with 400
VALIDATION_ERROR; no batch job is created.
```

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.

```
Batch submission may return partial acceptance. If some items fail request-time validation while others are valid,
the API returns 202 Accepted and may include:
- message
- accepted
- rejected
- errors
In this case, valid items are queued for processing and invalid items are rejected immediately.
```

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.

```
Note: For file ingestion, invalid rows are processed asynchronously and appear as rejected rows in the file job
results.
```

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.

```
Note: For batch submissions, some request-time validation failures may be returned directly in the initial POST
/ingress/interactions/batch response. Use the submit response for request-time rejected items; the tracking
endpoint primarily reflects accepted items that entered 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

List Analyses

Returns a paginated list of completed analyses matching the given filters. Date filter is mandatory; max range is 31 days.

POST

```
https://{host}/cqa/api/v1/accounts/{account_id}/analyses?limit={limit}&offset={offset}
```

Query Parameters

Parameter Name	Default	Max	Description
limit	20	100	Number of results per page.
offset	0	10000	Zero-based result offset for pagination.

Request Parameters (JSON Body)

Parameter Name	Mandatory / Optional	Type	Description
other_filters	Mandatory	array	List of filter objects. Must include at least one date filter.
quality_profile_uid	Optional	string	Filter by quality profile UUID.
metadata_filter_group	Optional	array of arrays	Nested filter conditions on interaction metadata. Each inner array is an AND group; outer array is OR.

Filter Objects (other_filters**)**

Date filter (mandatory):

Field	Value
field	"date"
operator	"range"
value	Object with start_date and end_date in YYYY-MM-DD or ISO-8601 format. Max range: 31 days.

Score filter (optional):

Field	Value
field	"score"
operator	"greater_than", "less_than", "greater_than_or_equal", "less_than_or_equal", or "equals"
value	Numeric score value.

Example Request

```
curl -X POST "https://{host}/cqa/api/v1/accounts/{account_id}/analyses?limit=5&offset=0" \
  -H "X-API-Key: {your_api_key}" \
  -H "Content-Type: application/json" \
  -d '{
    "other_filters": [
      {"field": "date", "operator": "range", "value": {"start_date": "2026-07-01", "end_date": "2026-07-15"}},
      {"field": "score", "operator": "greater_than_or_equal", "value": 9}
    ]
  }'
```

Response

200 OK

```
{
  "status": 200,
  "request_id": "51f6705d-6639-41ed-9029-d6053c5df1c2",
  "data": {
    "analyses": [
      {
        "analysis_id": "9f77853f-c4d4-482c-9651-b13394d65020",
        "interaction_id": "a30f0175-2ba0-46d8-8002-5b84667bfb44",
        "external_interaction_id": "file_7b1eeafb-f720-40bb-862f-60107f118e93",
        "profile_id": "e7d721ce-035d-4f79-ab62-e9cc2138f449",
        "status": "completed",
        "ai_score": 19.0,
```

```
        "qa_score": 21.0,
        "final_score": 21.0,
        "criticality_adjusted_score": 21.0,
        "metadata": {
          "source": "TestEvaluation",
          "agent_id": "qa_user",
          "campaign_id": "100"
        },
        "created_at": "2026-05-29T17:16:46.259993+05:30"
      }
    ],
    "pagination": {
      "limit": 5,
      "offset": 0,
      "total": 1
    }
  }
}
```


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. May be null if the interaction record is unavailable.
profile_id	string	Quality profile used for scoring.
status	string	completed, failed, or queued.
ai_score	float	AI-generated quality score.
qa_score	float	Manual QA score. Omitted if no manual review.
final_score	float	Effective score (QA if present, otherwise AI).
criticality_adjusted_score	float	Score after criticality weights.
metadata	object	Interaction metadata.
created_at	string (ISO-8601)	When the analysis was created, in tenant timezone.

Pagination

Field	Type	Description
limit	integer	Requested page size.
offset	integer	Current offset.
total	long	Total matching results across all pages.

Error Responses

Scenario	HTTP Status	Error Code	Example Message
Missing date filter	400	VALIDATION_ERROR	"Date filter is required. Provide a date filter with start_date and end_date in other_filters."
Date range > 31 days	400	VALIDATION_ERROR	"Date range must not exceed 31 days"
start_date after end_date	400	VALIDATION_ERROR	"start_date must be before or equal to end_date"
Invalid date format	400	VALIDATION_ERROR	"Invalid start_date format. Expected: YYYY-MM-DD or ISO-8601"
Invalid score operator	400	VALIDATION_ERROR	"Unsupported score filter operator"
limit out of range	400	VALIDATION_ERROR	"limit must be between 1 and 100"
offset out of range	400	VALIDATION_ERROR	"offset must be between 0 and 10000"

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.
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 or transcript_text is not provided)	string	Audio file URL(s). Supports multiple URLs separated by ;.
transcript_url	Yes (Mandatory if audio_url or transcript_text is not provided)	string	Transcript file URL(s). Supports multiple URLs separated by ;.
transcript_text	Yes (Mandatory if audio_url or transcript_url is not provided)	string	Actual transcript text of the conversation. If both transcript_url and transcript_text are provided, transcript_url wins
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 extensions: txt, pdf, doc, docx, srt, vtt.

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

> **NOTE**: These URLs (audio_url, transcript_url) must be publicly accessible or use pre-signed URLs (so CQA can fetch the recordings)

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,transcript_text,language,agent,campaign
call-001,VOICE,https://s3.example.com/rec-001.wav,,,en,agent-42,retention
call-002,VOICE,https://s3.example.com/rec-002.wav,,,hi,agent-15,support
chat-001,CHAT,,,Agent: Hello! How can I help you today?\nCustomer: I need to reset my password.,en,agent-
42,retention
call-003,CHAT,,,,agent-42,retention
```

```
Note:

  • chat-001 is valid via transcript_text

  • call-003 fails because it has no audio_url, transcript_url, or transcript_text
```

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
Max transcript_text	100 KB (UTF-8)
Conversation cap (trial accounts)	300 per month (default when no cap is explicitly configured)

external_interaction_id,channel_type,audio_url,transcript_url,transcript_text,language,agent,campaign
call-001,VOICE,**https://s3.example.com/rec-001.wav,,,en,agent-42,retention**
call-002,VOICE,**https://s3.example.com/rec-002.wav,,,hi,agent-15,support**
chat-001,CHAT,,,Agent: Hello! How can I help you today?\nCustomer: I need to reset my password.,en,agent-42,retention
call-003,CHAT,,,,agent-42,retention

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: I do not see the **Smart Assignment** tab when creating an Assignment Rule.

- **Possible Cause**: Smarter Assignment is not enabled for this tenant (common for existing live customers).
- **Solution**: Contact your Customer Success Manager to enable Smarter Assignment. New tenants have it enabled by default.

Problem: A call was scored against an unexpected Quality Profile (or missed the profile I expected).

- **Possible Cause**: Topic matching, confidence threshold, Default Profiles, or Fallback Profile settings on the Smart Assignment rule.
- **Solution**: Review **Topics** on the relevant Quality Profiles (max 10 per profile). In the Assignment Rule, check **AI Match Profiles**, **Confidence Threshold**, **Default Profiles**, and **Fallback Profile**. Tighten or broaden confidence, or adjust topics so the intended profiles match.

Problem: I cannot add more topics on a Quality Profile.

- **Possible Cause**: The profile already has the maximum of **10 topics**.
- **Solution**: Remove an existing topic before adding a new one.

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
Export job was created but no report was generated	**Start date is in the future.** For scheduled jobs, reports are only generated after the start date.	Check the job's start date in the Set Schedule step. Navigate to **Report History** to review execution status and error details.
Report contains no data / empty report	No analyses matched the selected quality profile and filters within the configured date range.	Confirm that the quality profile has completed analyses in the expected date range. Review the filters and date range configured in Step 3 (Select Data & Filters) of the export job.
Scheduled job stopped running after a certain date	The job's end date has passed.	Check the end date in the job's schedule configuration. If it has passed, create a new export job with the correct end date, or edit the existing job's schedule.
I cannot find my exported report	The report may not be visible in the old export flow.	All exports — both one-time and scheduled — are now available in the **Report History** tab in the left sidebar. Navigate there to view, download, or track all export jobs.

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.

2.2. Data Retention Policy

1. Purpose and Scope

At **Exotel**, we are committed to managing data responsibly, ensuring both operational efficiency and strict compliance with data privacy standards. This Data Retention Policy outlines how CQA classifies, stores, retains, and securely disposes of data processed within our Conversational Quality Analysis platform.

This policy applies to all customers using the CQA platform unless a specific custom agreement is in place.

Configured retention for your account is shown in **Settings → Policies → Data Retention** (read-only). To request changes, contact your account manager.

2. Data Classification

To ensure transparency and optimized storage management, CQA classifies data into two distinct categories:

A. Analysis Data

Structured data generated and stored by CQA during analysis. This includes:

- **Quality Profiles and KPIs** – Rules and metrics that define how interactions are scored and measured.
- **Interaction details and scores** – Per-interaction records, evaluation results, and quality scores produced by analysis.
- **Dispute records and resolutions** – Agent/supervisor challenges to scores and the outcomes of those reviews.
- **Assignment rules and Metadata** – Routing logic for which quality profile reviews what conversation, plus custom fields attached to interactions.
- **Dashboards and AI-generated Insights** – Aggregated views, trends, and AI-derived findings built from analysis data.

B. Transcripts & Recordings

Raw transcripts and recordings **ingested into CQA** (the copy stored by CQA):

- **Audio recordings ingested into CQA** – Call audio files copied into CQA for analysis (via integrations, APIs, or manual upload through test evaluation).
- **Transcript files ingested into CQA** – Transcript files copied into CQA for analysis (via integrations, APIs, or manual upload through test evaluation).

3. Standard Retention Schedule

Unless otherwise specified in a Master Services Agreement (MSA) or Order Form, CQA applies the following retention periods:

Data Category	Description	Retention Policy
Analysis Data	Structured analysis data and metadata stored in CQA	**Per account.** Retention is configured for your tenant. When purging is disabled, data is retained indefinitely for the lifetime of the subscription. When a retention window is configured, data older than that window is purged.
Transcripts & Recordings	Audio recordings and transcript files ingested into CQA	**6 months (~180 days)** from the date of ingestion / upload. Same for all tenants, not configurable.

Why this structure?

- **Per-account Analysis Data:** Lets each customer align structured insights retention with their audit, coaching, and compliance needs - including indefinite retention when long-term trend analysis is required.
- **6 months for Transcripts & Recordings:** Balances enough time for quality audits, dispute resolution, and coaching cycles while limiting how long sensitive media is retained in CQA.

4. Data Deletion and Purging

Once data reaches the end of its defined retention period, it is permanently deleted and cannot be recovered. Export any data you need before the retention window ends.

Analysis Data

- When a retention window is configured for your account, CQA runs a **scheduled purge** that permanently deletes Analysis Data (including Metadata) older than the retention boundary.
- When purging is **disabled** for your account, Analysis Data is retained indefinitely for the lifetime of the subscription.

Transcripts & Recordings

- Purging of ingested recordings and transcripts is **always active**.
- Files are permanently deleted **6 months after upload / ingestion** into CQA.
- **Only the copy stored in CQA is deleted.** The original file at the source URL is not affected.
- **What you may still see after media expires:**
    - If Analysis Data is still retained for your account, scores and analysis history can remain visible after the related recording or transcript file has been deleted.
    - Playback or download of the purged media will no longer be available in CQA.

Secure disposal

- Data is deleted in accordance with industry-standard secure deletion practices so that it cannot be recovered from CQA systems.