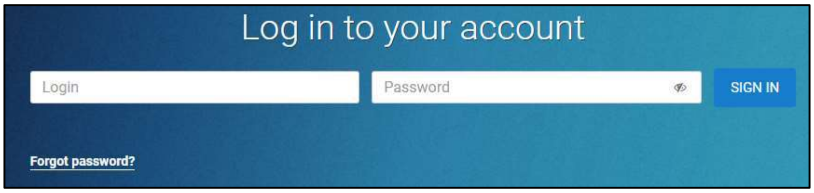
User Manual

Table of Contents

Login into QuickMetrix

Open the URL (https://inbox.quickmetrix.com/)in your web browser. The site shows the Login screen, which is used to authenticate a user. Type in your Login ID and password into the according fields. Hit the 'Sign In' button or press <Enter> on your keyboard to login.

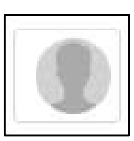


Getting Started

General Overview of the User Interface

Once configured, the screen is divided into functional parts which are explained here:

(1) List Operations

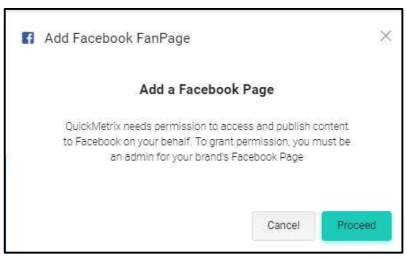


The List provides different icons such as Fullscreen, Social Media Authentication (Twitter, Facebook, etc – Login's so that response mgmt. is enabled) Configuration, Layout, Contact Support, etc.

How to authenticate?

Below are the steps for authentication.

1) Click on Human/profile icon in the right top corner and then click on 'Social Media Authentication' as shown below.
2) You will be able to see all the platforms listed. Click on Facebook and below screen will appear.



Please proceed and follow the further instructions making sure that authentication is done from the Admin credentials selecting the correct fan page and giving the permissions to QuickMetrix.

Likewise click on Twitter and follow the same process for authentication (Same process to be followed for all platforms)

Once the platforms are authenticated, page would refresh, and the icon would turn green.

(2) Settings

A setting is an adjustment in QuickMetrix software that adjusts it to the user's preference.

The setting includes elements such as Custom Report, Layout, Notes label, Tags, Tags Report, etc.

1) Social Inbox layout

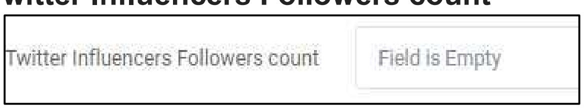
Now there is an option to change the layout as per your preference.
Under Settings > Click on Layout > By default the hover effect option will be selected.
You can uncheck this option and then hit submit as shown in the above image.

2) Add Brand Logo

Now you can add Brand logo from settings
Under Settings> Click on Layout> Insert the Brand Logo URL (JPEG / PNG) and click on submit (for e.g.:- https://qm.quickmetrix.com/img/qmlogonew.png) . Refer the above image.

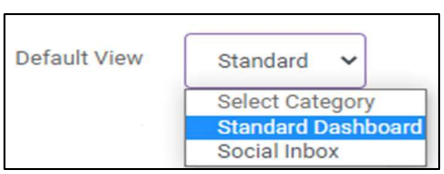
Once done, please re-login for the changes to take place.

3)Twitter Influencers Followers count



Under Settings> Click on Layout> Insert the Twitter Influencers Followers count
(For e.g.: - 1000)
You would be able to see followers count is red for Twitter Influencers with 1000 and above.

4)Charts Theme & Default View



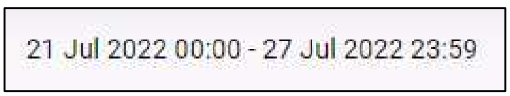
Change the chart theme are per your choice of theme
Under Settings>Click on layout> Charts Theme- select the theme of your choice

Also, can change 'Default View' which selected as Standard Dashboard you can select it to social Inbox.

(3) Brand

This area of the screen is dedicated to display main brand and other topic/ competitive brands.

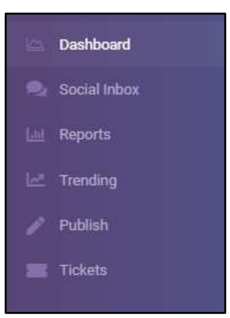
(4) Date & Time Range



The Date Range selector appears at the top right that allows you to select date and time for analysis. By default, the date range will be set to the past 7 days, but this can be changed at any time by selecting the date range and clicking on apply button.

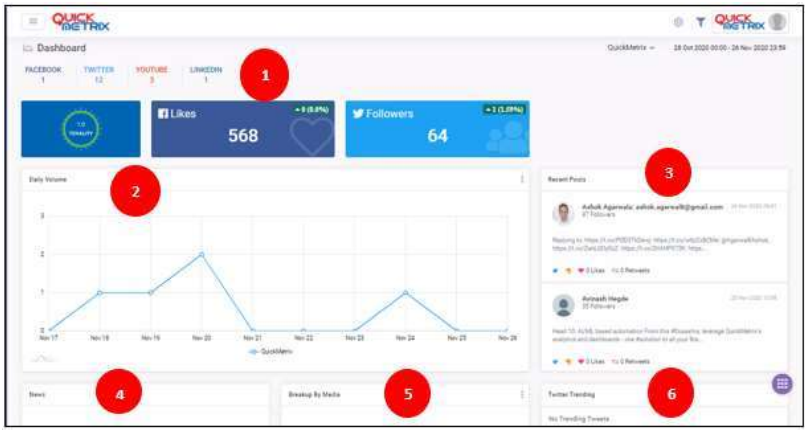
[Note: - For dates at the beginning of a range, the default time is 00:00:00 (midnight). For dates at the end of a range the default time is 11:59:59pm. The date range can be selected up to 3 months.]

(5) Tabs (Dashboard, Social Inbox, Reports, Trending, etc)



The Tabs are located on the left side of the content area and allow you to perform different actions, depending on what is being shown or selected in the content part of the window.

Detailed Information about all topics



Dashboard

The page which displays live content.

(1) Online Platforms

Data from multiple online platforms are viewed on the dashboard for the selected date range. That represents the number of conversations. Listening from social media platforms – Twitter, Facebook, YouTube, Instagram, LinkedIn, News etc.

Media Coverage for Listening and Limitations

Twitter- Data Collection is permissible for twitter brand and competitors posts like Brand Posts, Influencers/ other Posts, Replies, Retweets, Reach and Impressions. Twitter provides 30 days historical by default. Twitter DM (direct messages) and Publishing are accessible on QuickMetrix after authenticating twitter brand account through QuickMetrix. In twitter, like (heart) and retweet button is only available for logged in users, like button is not available for retweets. Furthermore, you can reply to the DM and replies through QuickMetrix once the twitter account is authenticated. Twitter canned responses work only for logged in users.

Facebook – Data Collection is possible for Facebook fan pages of Brand and competitors and not personal FB pages. By default, 30 days of historical data is obtained for Facebook. Dark posts/Advts & its comments can be tracked for FB after authentication. Posts available on Facebook without authentication are brand posts and comments. (Facebook will not provide the names of the people making the comments as Facebook requires admin authentication for giving those details. Hence for competition, all comments will be shown as from 'Facebook User')

Posts and charts visible after authentication of the brand page on QuickMetrix are as follows: -

- Posts – Comments with FB usernames, Facebook DM (Facebook messenger), advertising posts, reply to DM or Comments from the QuickMetrix tool, Can Publish posts through QuickMetrix. Video view/Reach/impressions is for logged in users. FB canned responses works only for logged in users
- Charts/Reports – The charts/Reports that get noticeable after authentication are: -
    a. Page Reach by Age and Gender
    b. Page Impressions Type
    c. Brand post Reach by Day
    d. Page Reach by City
    e. Page Reach by Country
    f. Page Engagement by Type
    g. Page Engagement Daily
    h. Reaction Classification Report

FB others – Information is provided by QuickMetrix for whatever conversations are happening around the brand on other fan pages.

YouTube – QuickMetrix will be able to get the data from Brand and competition channels for the videos and the engagement for the same. YouTube canned responses work only for logged in users

Instagram – Brand owned pages data is only available for Instagram. The Instagram account needs to be authenticated to get the data and reports for Instagram. You can see Instagram followers from the day you have configured into QuickMetrix. You cannot see historical followers. Instagram DM, Advts/dark posts, IGTV videos and boosted posts cannot be seen in QuickMetrix even after authentication. Instagram will provide limited data for competition brands as all data is provided only for authenticated admin handles. Instagram publishing works only from the phone. Instagram permits hashtag tracking only for the last 24 hours.

Only brand post data is permitted by Instagram for non-authenticated handles/ competitors since January 2021. Follower's count would be available only for authenticated handles.

LinkedIn – Company pages data is only available for LinkedIn. No data for competitions. Only company pages can be crawled and not personal LinkedIn pages. LinkedIn canned responses work only for logged in users

News and Forums – Data collection for online news and forums sites is based on keywords configured in the login. E-commerce sites for product reviews can be configured, under forums.

Time lag

Platforms	Minimum	Maximum
Twitter	3 minutes	5 minutes
Facebook Posts	4 seconds	4 minutes
Facebook Comments	4 seconds	4 minutes
Twitter DM	immediately	immediately
Facebook Message	5 seconds	1 minute
Facebook Reviews	5 minutes	5 minutes
Facebook Review comments	5 minutes	5 minutes
Facebook Promotional Posts	10 seconds	3 minutes
Facebook tagged posts	10 seconds	4 minutes

Limits & Limitations

1. For Social Media Platforms:
   i. Crawling possible for - Twitter (100% - For brand & competition), Facebook (fan pages of brand & competition), LinkedIn and Instagram (Only Brand Owned pages), YouTube (100%)
   ii. Possibilities on Competition Tracking:
   iii. Facebook - Yes but Facebook will not provide the names of the people making the comments as Facebook requires admin authentication for giving those details. Hence for competition all comments will be shown as from 'Facebook User'
   iv. Facebook messenger cannot be tracked for competition as it also requires authentication
   v. LinkedIn - Brand Posts and Comments on Brand posts are being tracked. As of 1st May 2021, LinkedIn also allows to track tagged posts will show up only if the user has mentioned brand handle on their main post (not on comments). No data for competitions. Only company pages can be crawled and not personal LinkedIn pages. LinkedIn canned responses work only for logged in users.
   vi. YouTube: Yes, QuickMetrix will be able to get the data from competition channels for the videos and the engagement for the same. Keyword listening also applicable on YouTube.
   vii. Instagram: Instagram DM, Historical, Advts/dark posts, IGTV videos and boosted posts cannot be seen in QuickMetrix even after authentication.
   viii. Instagram will provide limited data for competition brands as all data is provided only for authenticated admin handles. The data for competitors will be provide only if the main account’s/Brand accounts Instagram account is authenticated which is mandatory.
   ix. Instagram publishing works only from the phone.

x. Instagram permits hashtag tracking only for the last 24 hours.

2. For Crawling News portals, Discussion Forums, & Blogs:
   i. QuickMetrix has a crawling engine that will crawl sites and fetch data based on keywords. The list of platforms that QuickMetrix currently crawls is attached in Annexure 2 of this document.
   ii. This list is a dynamic list as QuickMetrix team will keep adding more portals to this list based on the relevance and client inputs and some portals may be removed due a change in their policy on providing data to crawling engines.

(2) Daily Volume Chatter

Chatter volume (Includes all platforms except messages) for the brand can be seen for a week duration in the daily volume chatter. Which helps understand the increase and decrease in the conversation volume happen in a week. It also includes the Tonality, FB Likes, FB Talking about & Twitter Followers count.

- **Tonality** - Tonality scoring involves detecting sentiment-bearing terms, determining their contextual polarity and their intensity and then computing an aggregate value for the message or sentiment object of interest.
  Tonality =Total Positive Sentiments/ (Total Positive Sentiments + Total Negative Sentiments)
- **FB Talking about** - This is actual number of people who are engaged and interacting with that Facebook Page. This people who actually come back to the page after liking the page. This includes activities such as comments, likes to a post, shares, etc by visitors to the page

(3) Recent Posts (Across all platforms)

Chatter box shows real time quick updates for the people talking over brand

(4) News

Mention of brand/person in the real-time update from any specific news portal is shown on the top

(5) Breakup by Media

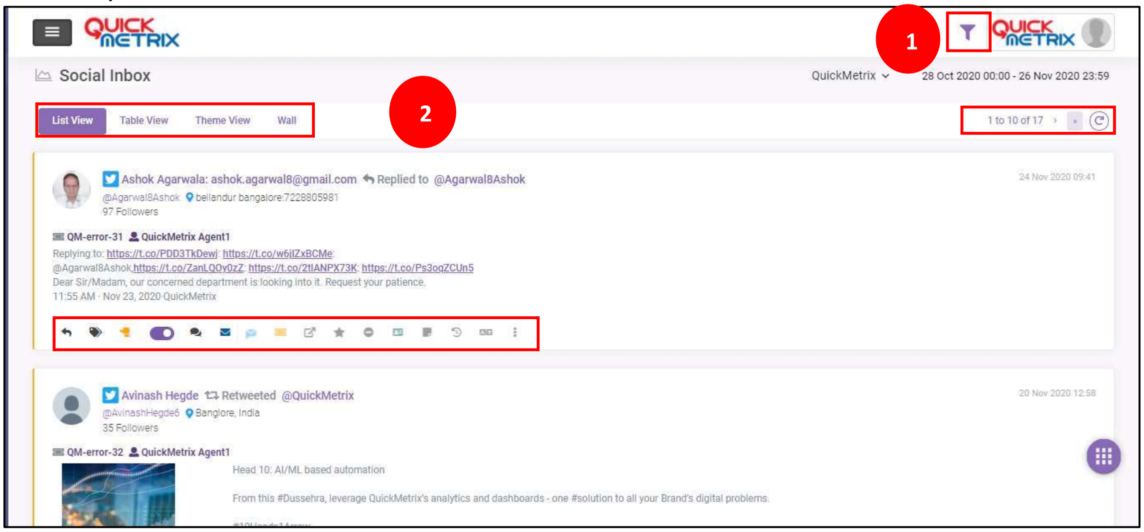
Break up by media navigates you to see where your brand is performing more on social platforms

(6) Twitter Trending’s

Twitter trending highlights the tweet’s trending for the brand

Social Inbox

Social inbox will comprise all the conversation from brand and people talking about it on various platforms

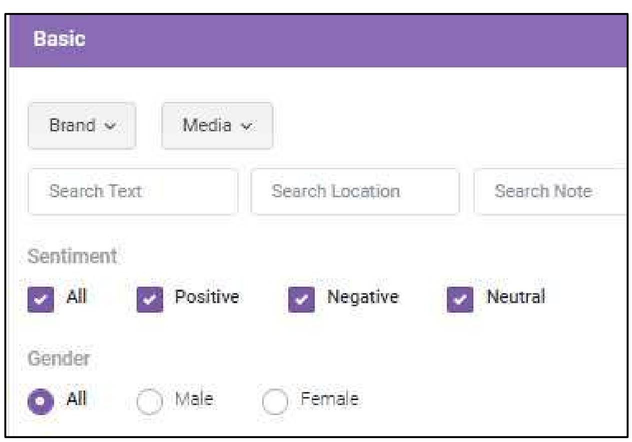


(1) Filters

Filters can be used for different views. Apply filters for analysis

➢ Basic

Different actions can be performed using ‘Basic Filters’



Conversation can be tracked with brand, Media, Search Text, Search Location, Search Note, Sentiment and Gender. which helps for quality purpose, various actions like hide retweet, hide repeated users can be used for better conversation count.

Filter brand can help to do competitor analysis on various places

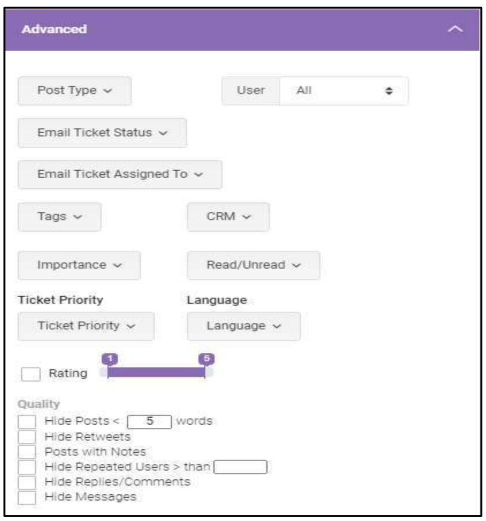
Search:

- Various keywords and phrases can be searched through search text
- Display/Screen name can be searched in 'Search Text' for Facebook and Twitter by using 'from:@handle'.
- Conversation can be tracked geographic specific region through search location

Note: - News and forums are not a part of social media platform hence they need to check separately.

Selecting competitor will not merge data in social inbox but will reflect data on reports.

➢ Advanced

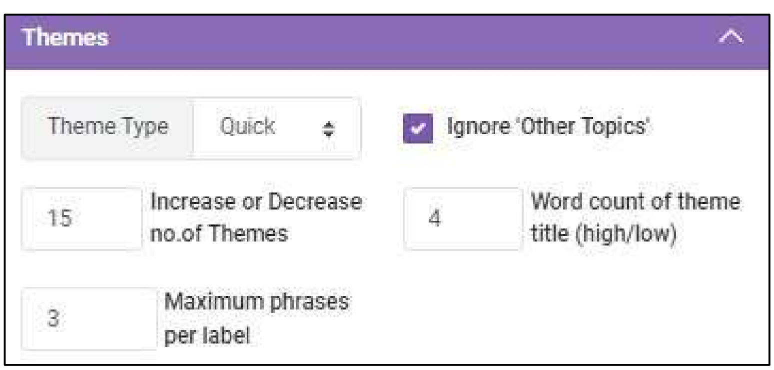


Using Advanced filters helps you with more effective analysis.

Get in depth slicing and dicing of the conversation with the help of advanced filter like Post Type, User, Tags, CRM etc. Combination of basic and advanced filters is also possible

➢ Themes

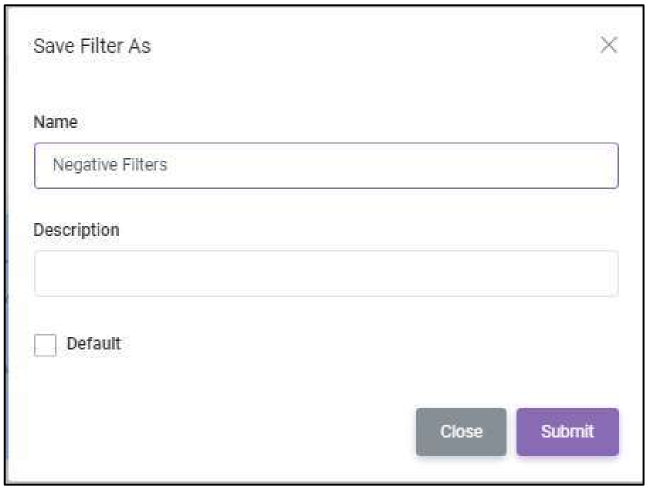
Themes Filters are used for ‘Theme view’ to analyze the dept of phrases.



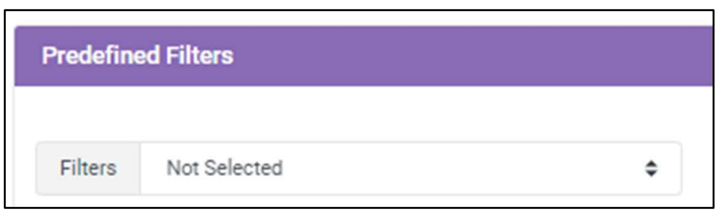
➢ Predefined Filters

Predefined Filters is used to save a repeatedly used filter for quick filtering.

- Select the filters you wish to apply and click on ‘Save Filter’
- Give a ‘Name’ to the filter you wish to save with. Add description if needed.
- By Selecting the Default box, the filters would be set to default. So, whenever a user login’s the filter would be applied by default.



- Re- login to see the predefined filter.



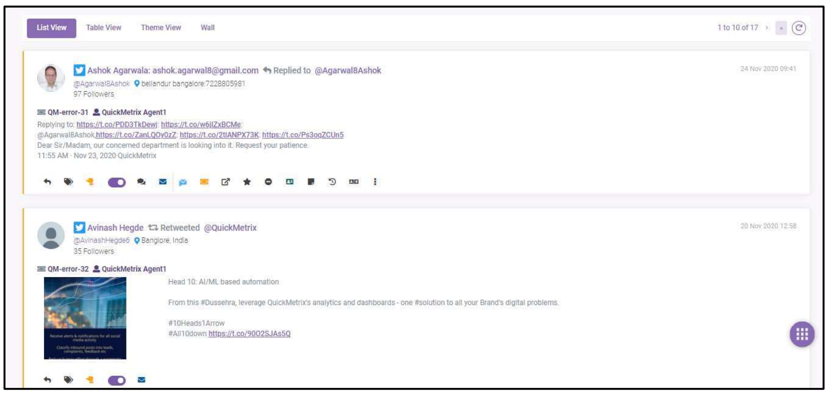
In filters- Select the predefined filter and click on apply. The Filters would be applied.

(2) Types of views

This is an overview for all the conversation made by consumer from all social media platforms

➢ List View

List View to see details of all conversations

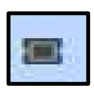


Functions

This helps to delete the conversation from the QuickMetrix software and not from social media platforms

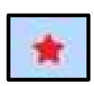
A Conversation can also be translated into English, if written in regional language

Using this icon, it directly opens the post on any platform used



Ticket – Auto Assign to Agent for action. These is one of the key features which is used for ORM (Online Reputation) purpose.
(Additional features)

Brand can use this action to re-tweet any of the posts



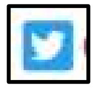
Mark as Important – Click on the star icon to mark the conversation as important.

Using this action, the earlier conversation of the user can be seen for the brand

Click Mark as
Read or Mark as Unread.

This is one of the key features to tag posts naming complaints, service, lead and can be designed as per campaign.

Time the post has been posted

	It allows to track the conversation easily		
	This is used as a note/reminder for future purpose		Sentiment, can be seen here.
	Activity Audit - View the activities related to sentiments, tags and responses		Source Platform – Through which you can on which platform the conversation/ post is from
	Send Email Ticket to specified contacts for information/ action		Reply directly to the comments/replies from QuickMetrix Platform. *(Note:- Only authenticated users can get this reply icon)*

➢ Email Ticketing

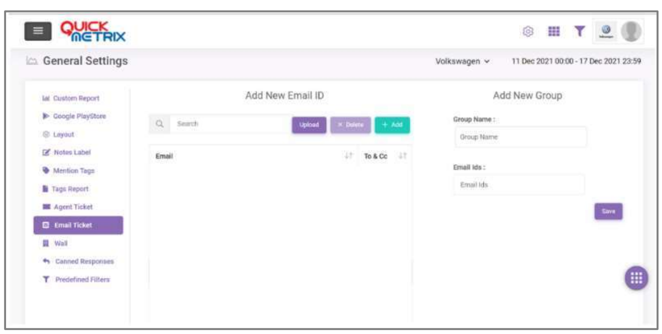
A simple yet effective workflow has been built in QuickMetrix to track the lifecycle

• from when the social media person routes a post to a department (Open)

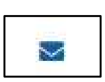
• receiving an appropriate response from them (in progress)

• and then finally closing the cycle by sending that ad verbatim response to the customer (closed)

1) Click on 'Settings' at the top right side of the dashboard and then click on Email ticket option.

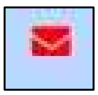


2) Click on 'Add' to input email Id's in 'To' and 'CC', also you can upload the email Id's in bulk.
3) Once the Id's are added you can delete them or form a group with those ID's for easy access.
4) After adding the Id's, go back to the social Inbox –'List View' the Email ticket icon would be highlighted. Clicking on the Ticket icon opens up a list of Email Id'

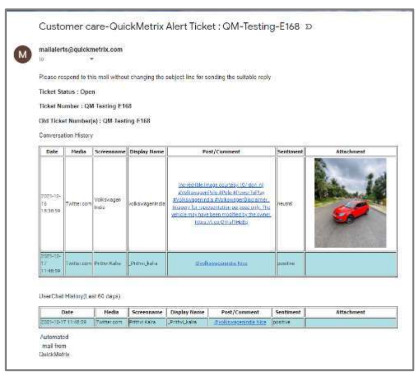


5) The selected post can be sent to multiple email ids for resolution or detailed response to be sent to customer.

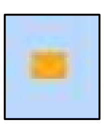
6) The recipient sees it as a regular email (Outlook, Lotus Notes, Gmail, etc.) and requires neither access to the brand's social platforms nor to QuickMetrix
7) Once the is sent, the icon changes colour to notify that the post has been emailed for the 'official' response



8) The recipient sees the post as an email and has to respond without changing the subject line.



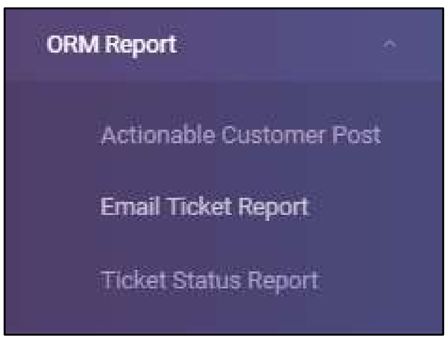
9) The concerned team received the text of the case as a standard email. When they respond to it, the ticket is 'in progress'
10) To view the response. Again, the changed colour of the icon indicates that a response has been received.



11) Clicking the icon shows the response sent from the concerned email is, which may be copy pasted and sent to the customer, with closure remarks, if any

12) The reply from concerned team is received in QuickMetrix. When the same is copy pasted and sent to customer, the ticket is 'closed'

13) The audit flow can be check from the Email Ticket report under ORM Report.



➢ Table View

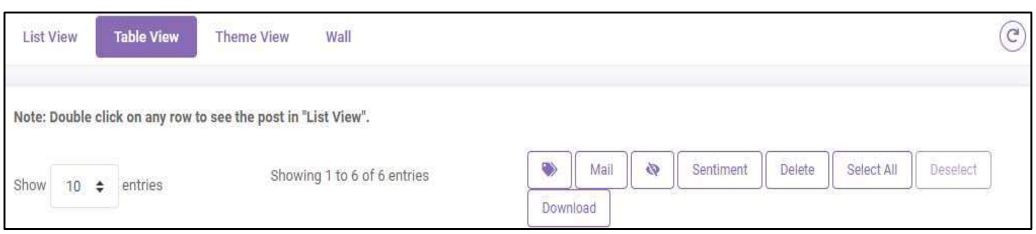


Table View to see list of conversations in bulk

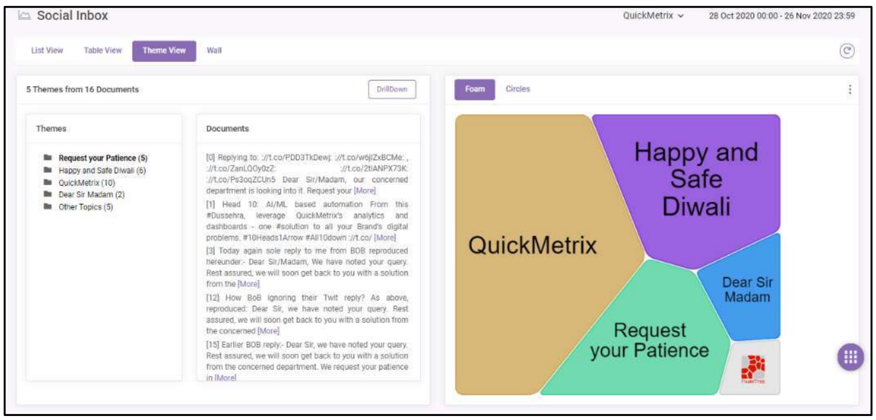
- Table view shows the same data in tabular format.
- This is provided for the user to drive productivity when working with large volumes of data
- Ability to select multiple data points like in excel sheet and perform different activities on the same such as:

- ✓ Sentiment change
- ✓ Tag the conversation
- ✓ Mail to internal or external team
- ✓ Delete the conversations

- Any content can be quickly searched by using the top row as filter. Just start typing on any column and QuickMetrix will start filtering the content in real time

➢ Theme View

Theme View is the visual presentation of the list view



- Social Inbox – Conversation highlights in honeycomb format
- Theme view provides quick view of various topics in huge volume of data that can be selected for any time period. Quick and Advanced Settings to set the theme view
- The themes titles indicate the topics of discussion and the size indicates the interest in the topic
- The themes can be further drilled down to see sub-topics within them
- Theme charts are a visual representation of the same data that enables user to understand the nature of discussion and the key topics that are being discussed without manually eye-balling the full data

➢ Wall View (Additional Feature)

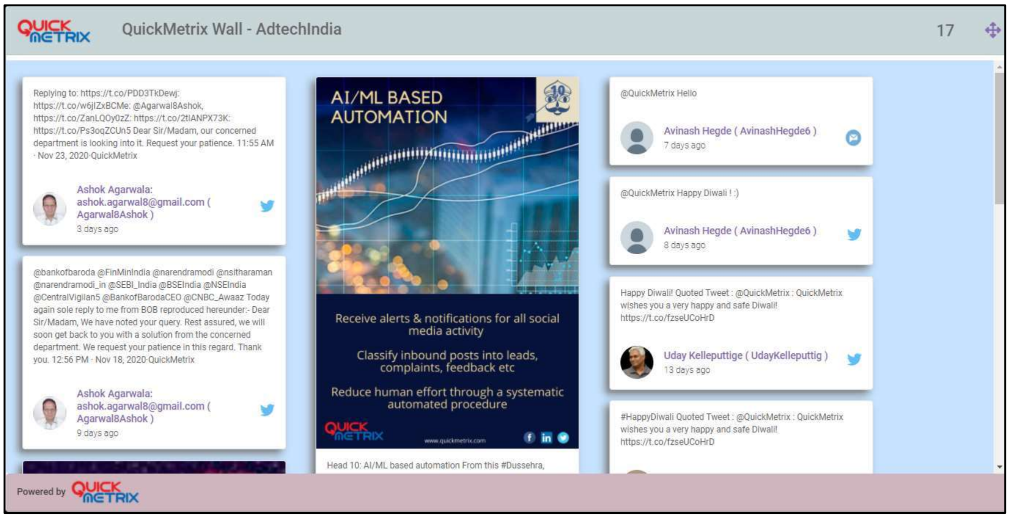
Wall view is a simpler and easier way to aggregate all social media posts mentioning your brand or hashtags and display them on screen. The use of wall view can be done during business events, exhibitions etc.

"Wall View" feature on QuickMetrix shows you real time tweets/comments that are coming in in a clear picture.

Auto-refresh happens every 30 seconds so that the latest tweets are visible on the Wall.

- Select the date range accordingly and brand name and click on Refresh
- Click on Social inbox and then Wall view.

- You can also load full screen view as shown below (Especially when displayed on a projector)



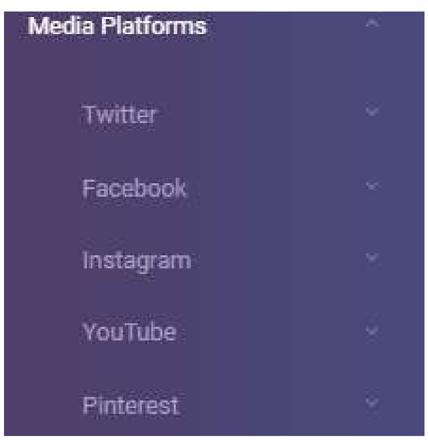
Note: - apply filters in case you want to refine the data (Under filters)

Reports Tab

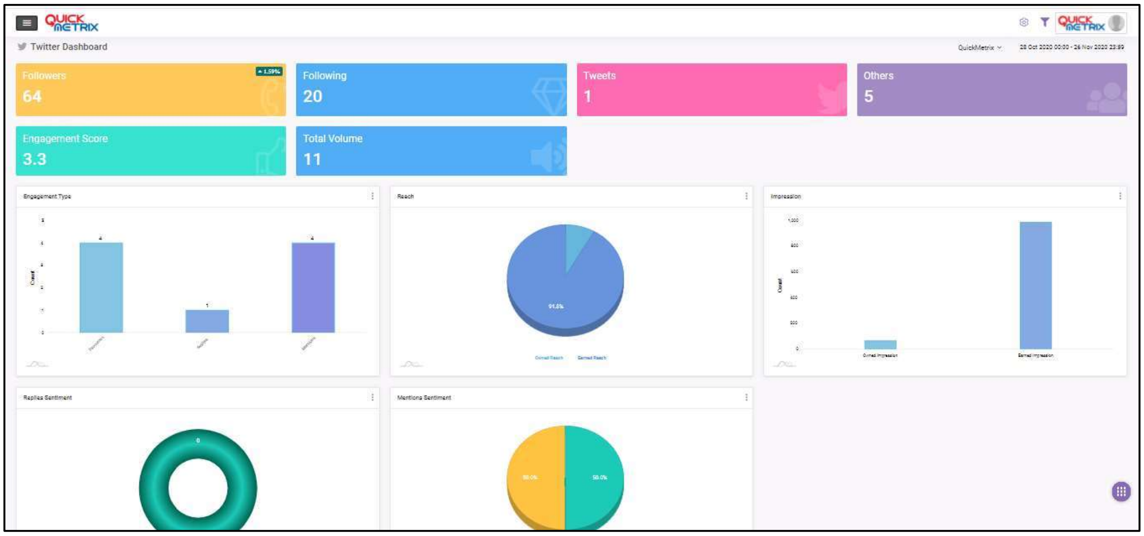
Rich out-off -Box reports for more detailed analysis on the required platforms.

Rich Array of Reports that are continuously evolving based on client needs and requirements.

➢ Media Platforms



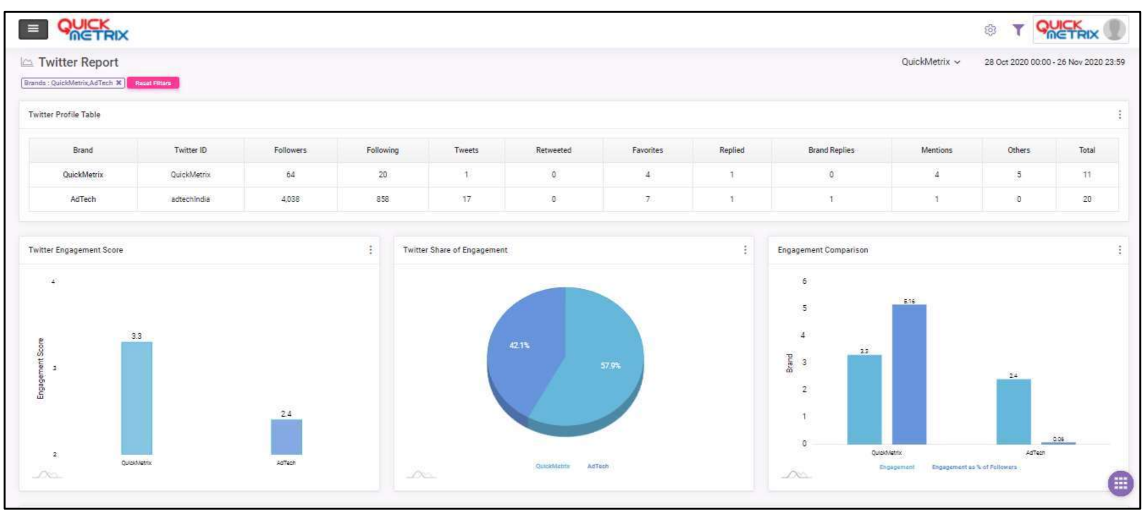
- Twitter Dashboard



- The snapshot it the example of Twitter Dashboard. It is the overview of the selected platform (e.g.: - Twitter Dashboard, Facebook Dashboard, etc)
- The Dashboard contains depends according to the selected platforms.
- For e.g.: - Twitter Dashboard contains Followers & Following count, Brand Tweets, Mentions (Others), Engagement Score, Total Volume, Engagement Type, Reach & Impressions Pie Graph.

  Engagement score =0.5*(Mentions + Replies) + (0.3* Retweets) + (0.2*Favourites)

- Twitter Full Report

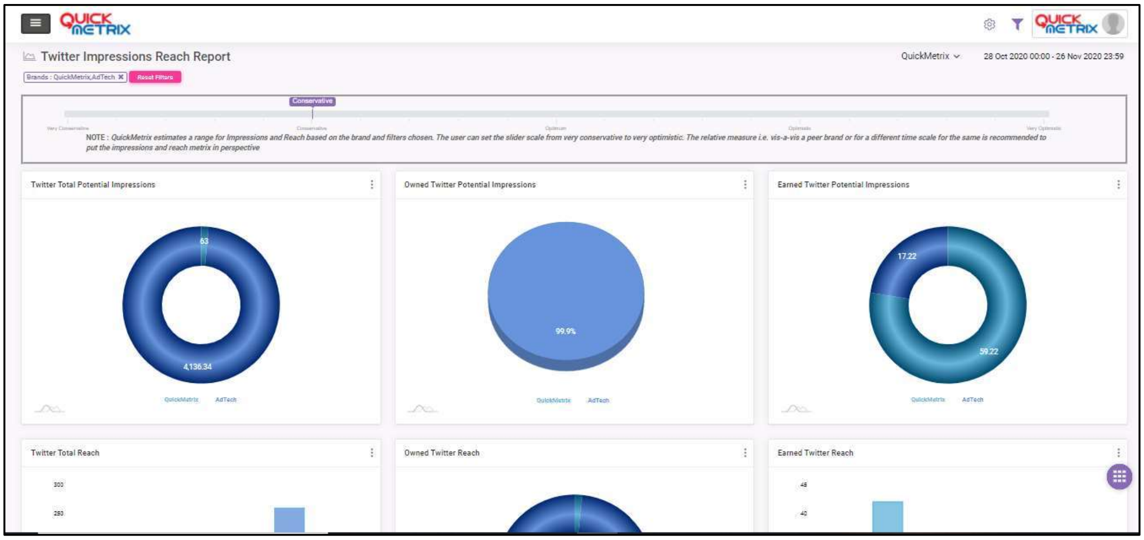


Full Reports for Brand & Competitors

- The above is Twitter report for Volkswagen and competition brands.

- Shows comparison of engagement, no. of brand posts, replies, favourites, retweets, mentions, etc.
- More charts from Twitter report. Comparison with competing brands on per hour data points such as brand tweets/hr, engagement /hr, engagement /day.

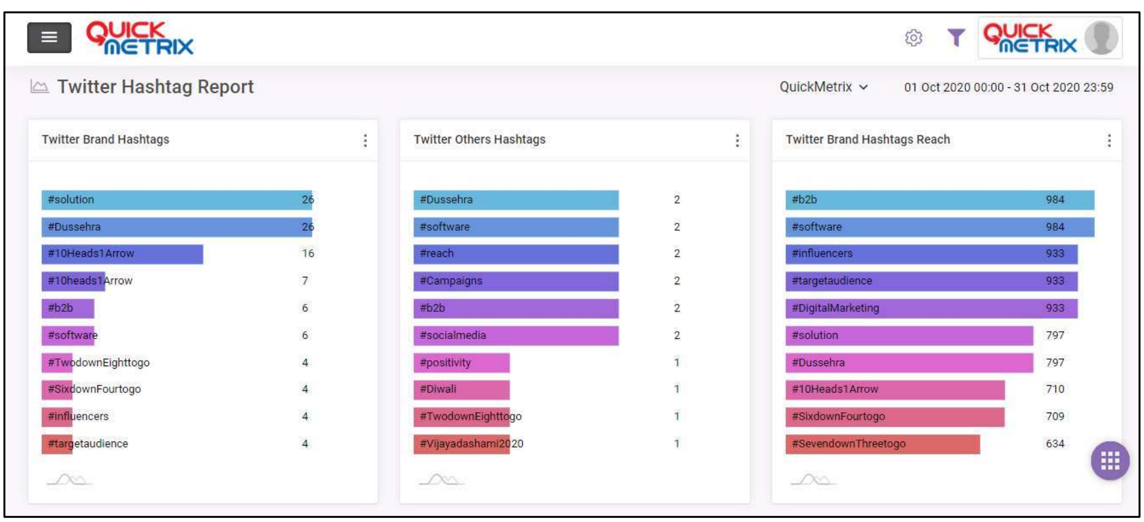
    - Twitter Impression/Reach Report



Twitter Potential Impressions and Total Reach Report for Brand and Competitors

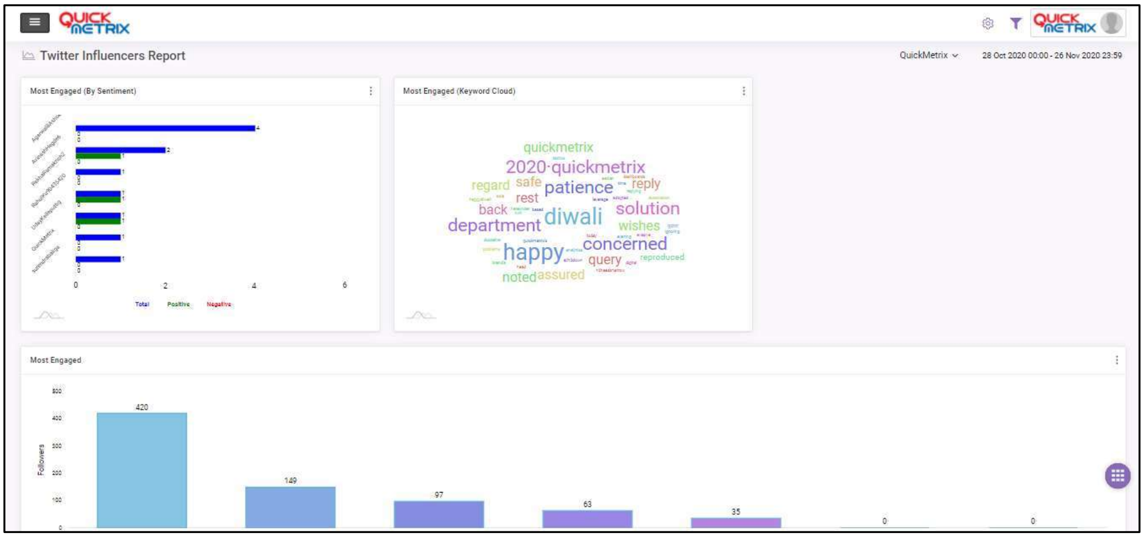
- **Potential Impressions** – The number of times relevant posts has shown up across digital network.
- **Reach** - The total number of people who see your content.

    - Twitter Hashtag Report



Twitter Brand Hashtags & Reach / Twitter other Hashtags & Reach

- This report is useful for Hashtag Campaign analysis
    - Twitter Influencers Report

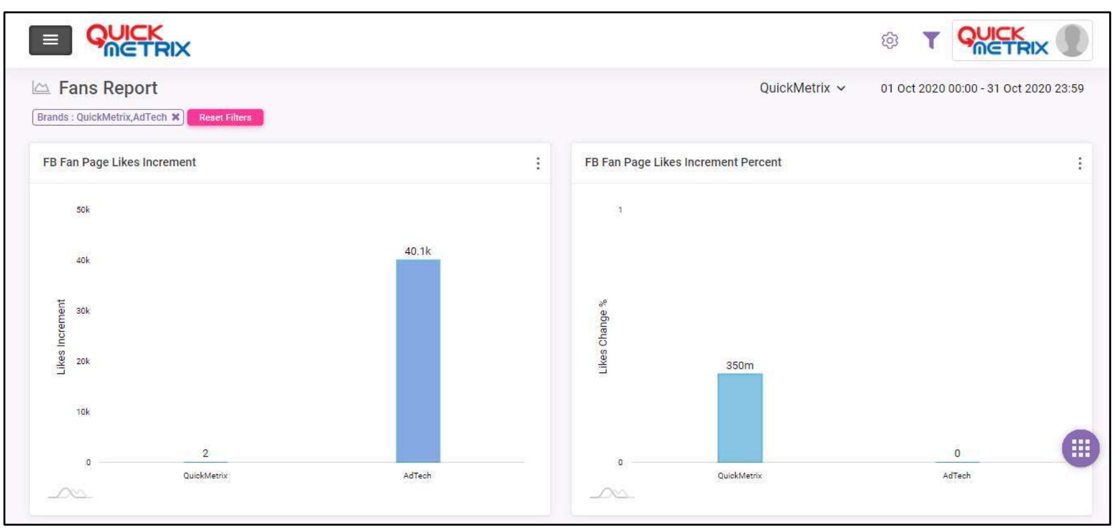


- Twitter Most Engaged/ Valuable influencers can be tracked on QuickMetrix

Other Reports

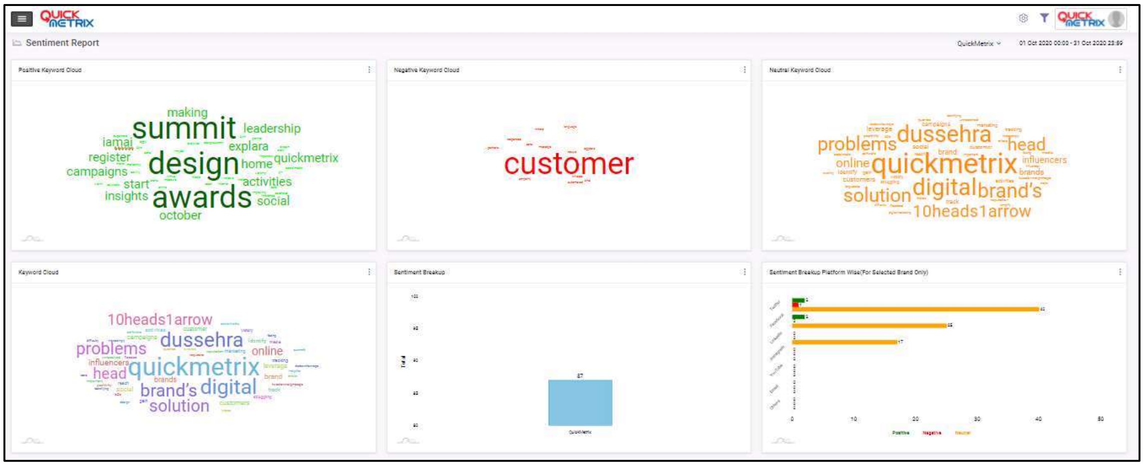
- **Twitter Reports** – Quick Report, Trending, Keyword cloud, Engaging posts (Brand & other posts)
- **Facebook Reports** - Full report, Engagement Report, Reaction Report
- **LinkedIn Reports - YouTube Reports - Instagram Reports - Google Analytics – News Report – Forum - Report**

➢Fans Report



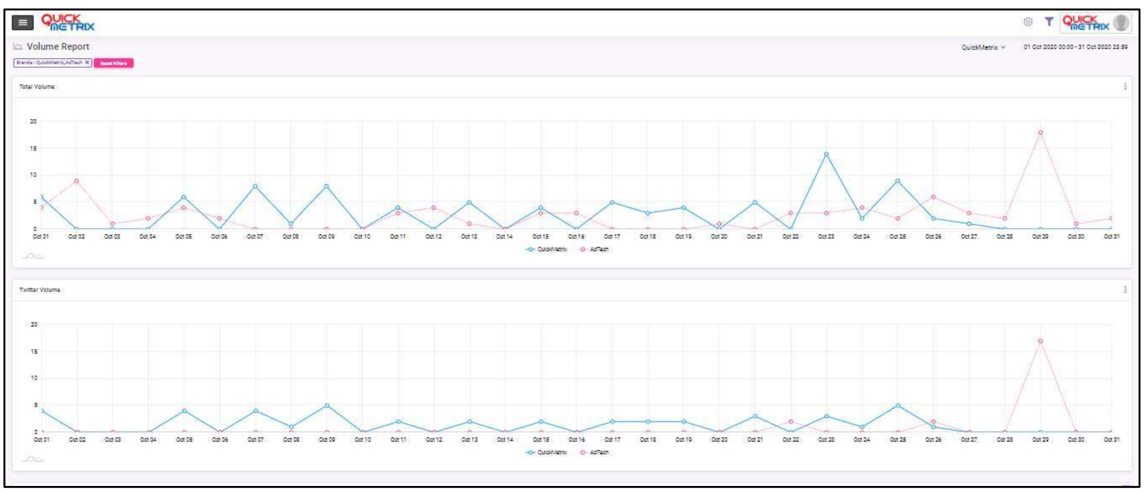
- Fans Report contains Twitter Follower, FB page Likes, Instagram Followers count and increment count

➢Sentiment Report



- **Sentiment Analysis** – Identify if a conversation is positive, negative or neutral in its tone. Sentiment Breakup by Brand & Competitors

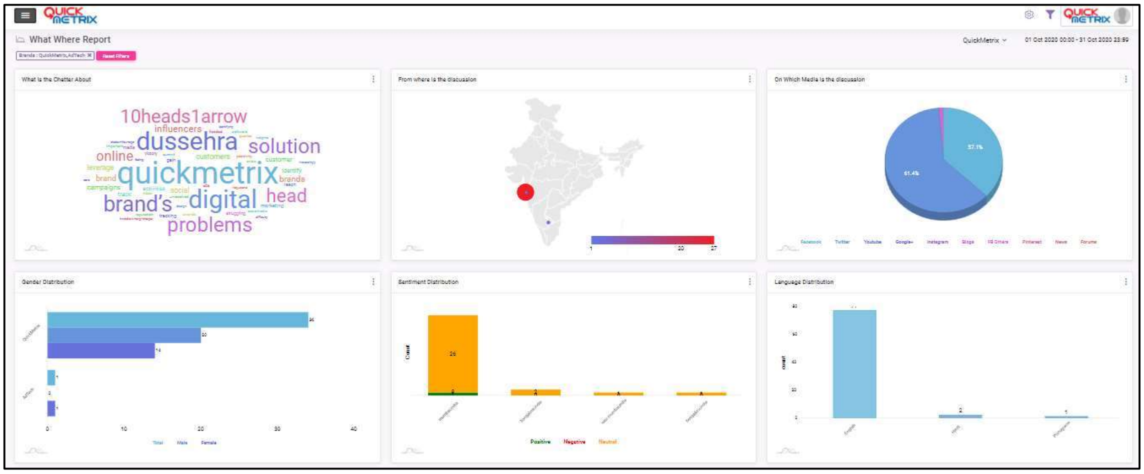
➢Volume Report



- Volume Report includes daily total volume for selected date range as well as separate volume for different platforms like Twitter volume, FB volume etc.

- It helps to compare brand volume with competitors and compare the share of Voice (Volume)

➢What/Where Report

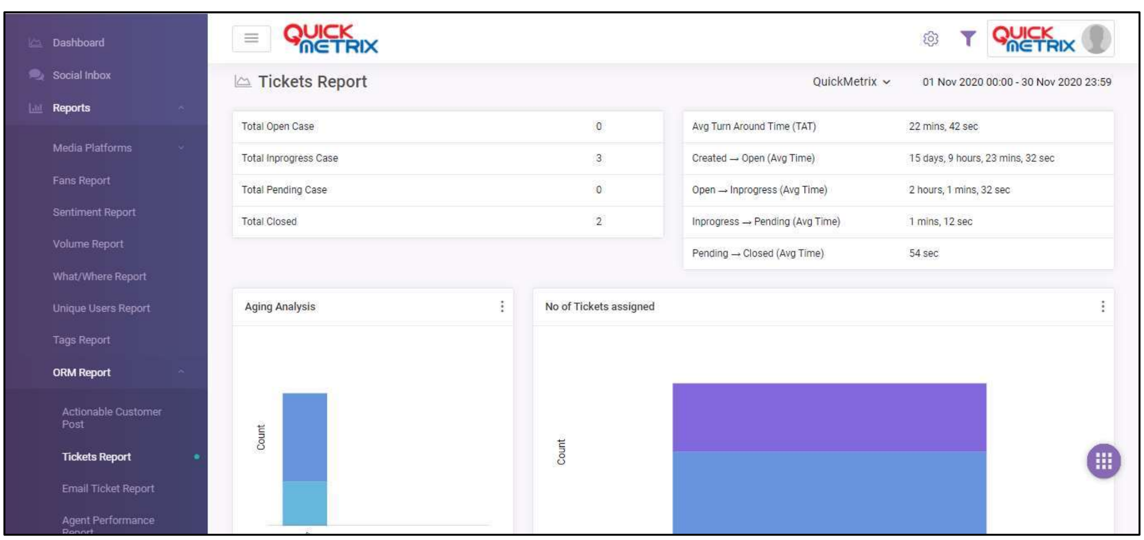


- This report shows what is the conversation competing brand ‘Volkswagen’ and from where the conversations are originating.
- There are few more charts here that shows gender break up between competing brands, city wise sentiment breakup, language distribution for Volkswagen conversations.

➢ORM Report

The ORM report will show which tickets are at which stage and the time it took to move to each stage. Also, details of how many tickets are pending with which agent can also be seen.

- Click on ‘Report’ tab and then open the ORM report.



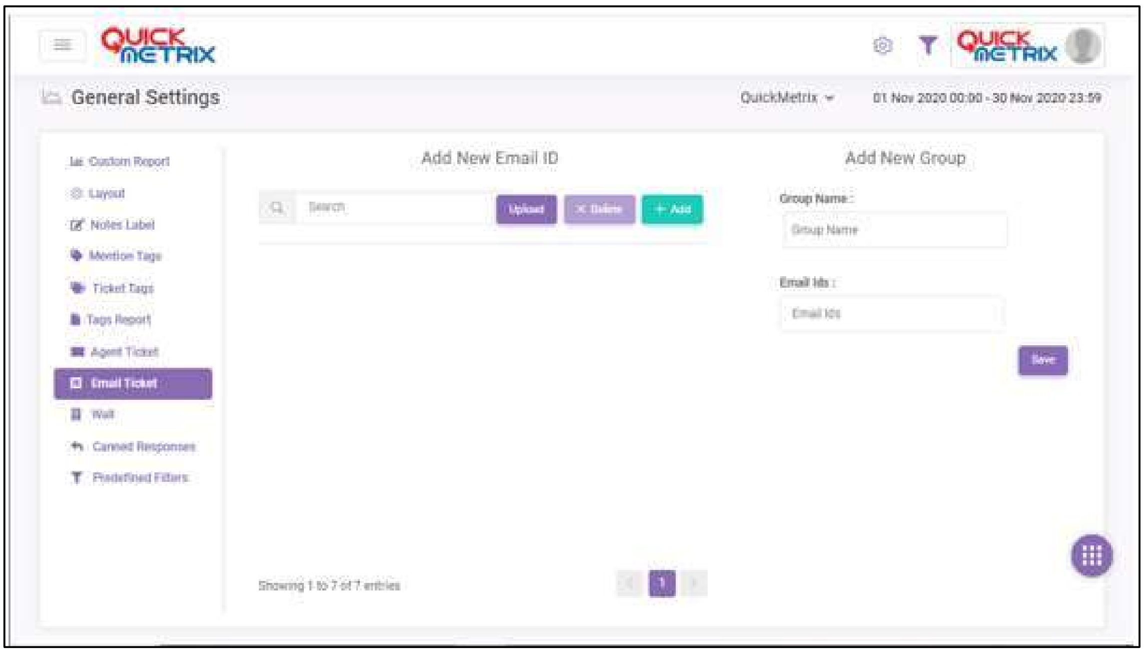
Tickets report that indicates how many customer queries/complaints have been routed to various internal teams / agents.

- It provides with a chart that displays number of cases open, in – progress, pending or closed. The next chart shows the average time taken at each stage of ticketing process.
- Aging Analysis – Week to week status of cases/tickets
- No. of Tickets assigned - Number of tickets assigned to agents, and the status of those tickets

Grouping of email ids possible on ‘Workflow Email’

- Grouping Email ID help you to efficiently communicate with other members or the group as a whole. It is easy to email a group of people at the same time by just selecting group name instead of select email ID’s, which saves time.
- Click and open the setting option in the list view

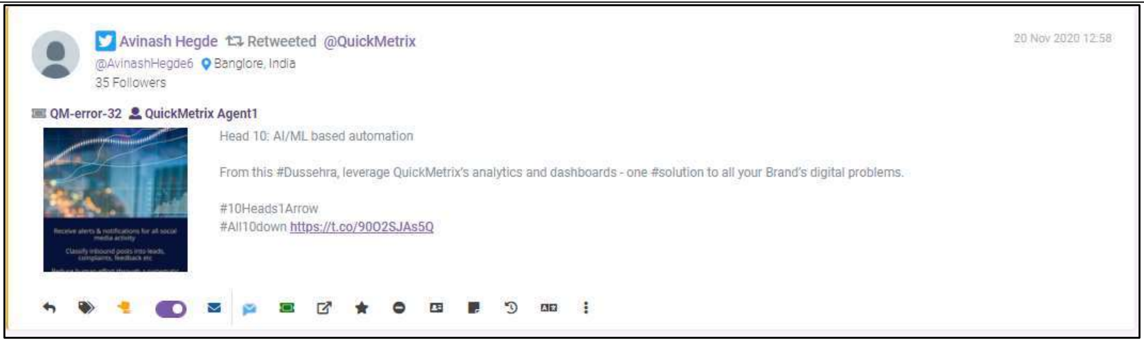
- Click on ‘WorkFlow Email’ in General Settings



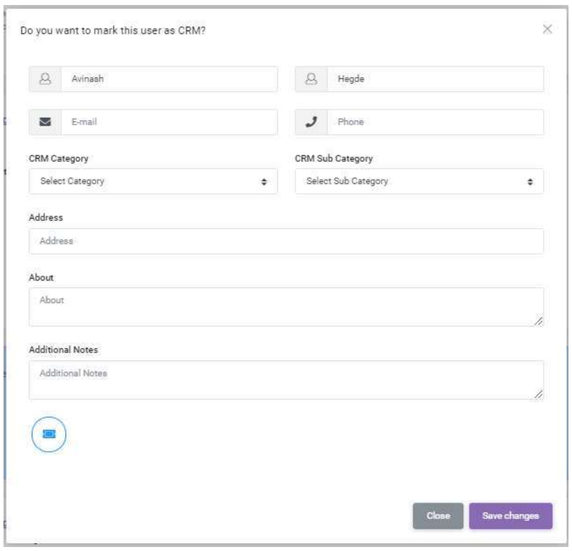
- Insert the Email ID’s you wish to Group in ‘Add New Email ID’; then ‘Add a Group Name,’ and select the email ID to be added in the Group. Click on Save. The workflow email group would be created.

➢CRM Report

To mark a customer/Influencer/Merchant/Banker etc and make a list in QuickMetrix. You can all do it with the help of ‘Add CRM’ icon In social Inbox – List View

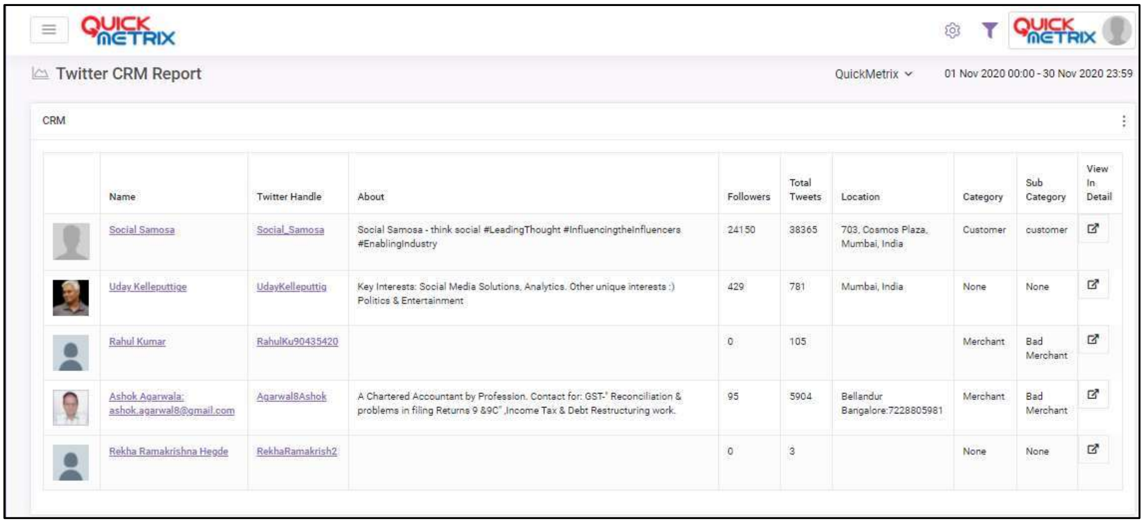


- Click on 'Add CRM' and the below dialog box would be display



- Fill in the details and select the Category and Sub- Category and click on okay. The user would be marked as CRM. Once added the user in CRM list you would be able to view the list in 'Reports Tab- CRM Report'. The CRM list is Divided according to the platform as show below: -

- Click on the platform you want to view the list. For e.g. – Click on Twitter – CRM Report. The list would be provided as show below: -



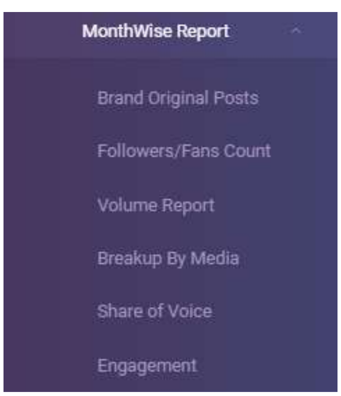
- You can download the list into excel, by click on download button. This help to save time in manually feeling the details in excel.

Note: - Columns would be different for different platform in the list.

➢ MonthWise Report

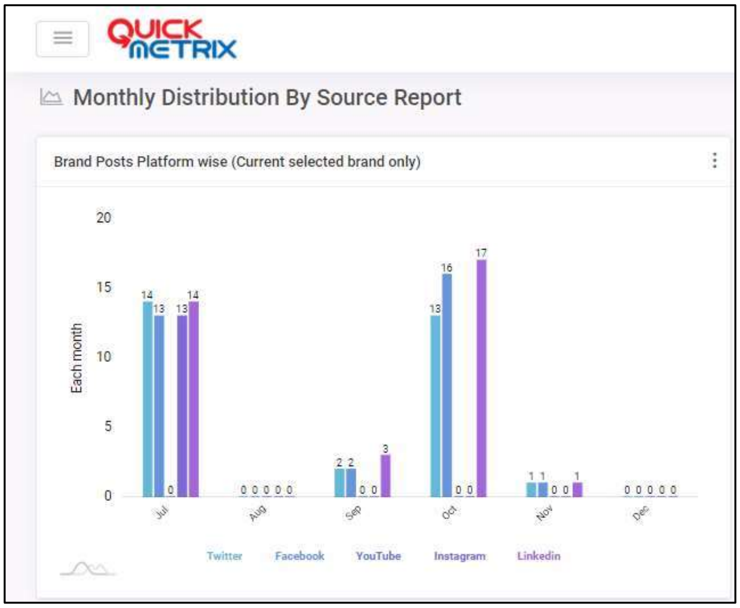
Month wise reports in QuickMetrix provide important data or report for the last 6 months in respective to the date range selected. Get to know your brand month-wise progress.

- Click on Reports tab- MonthWise Report



1) Brand Original Posts

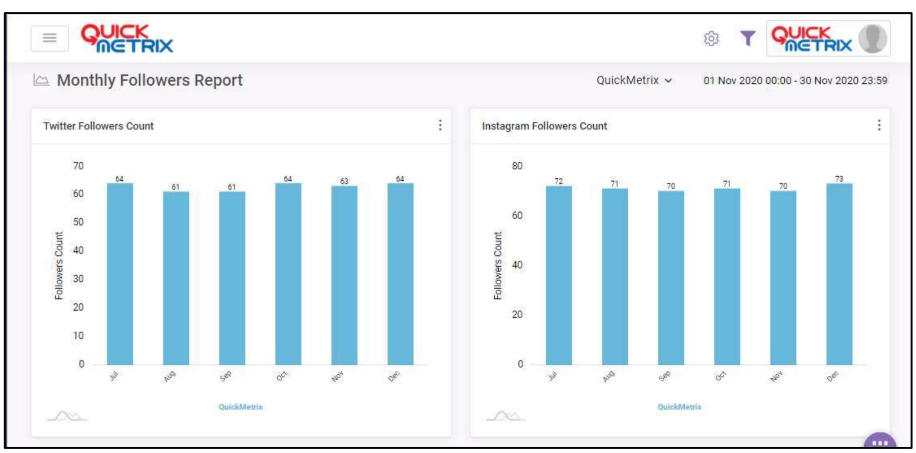
This report includes month-wise brand original posts for various social media platforms like Twitter, Fb, etc.

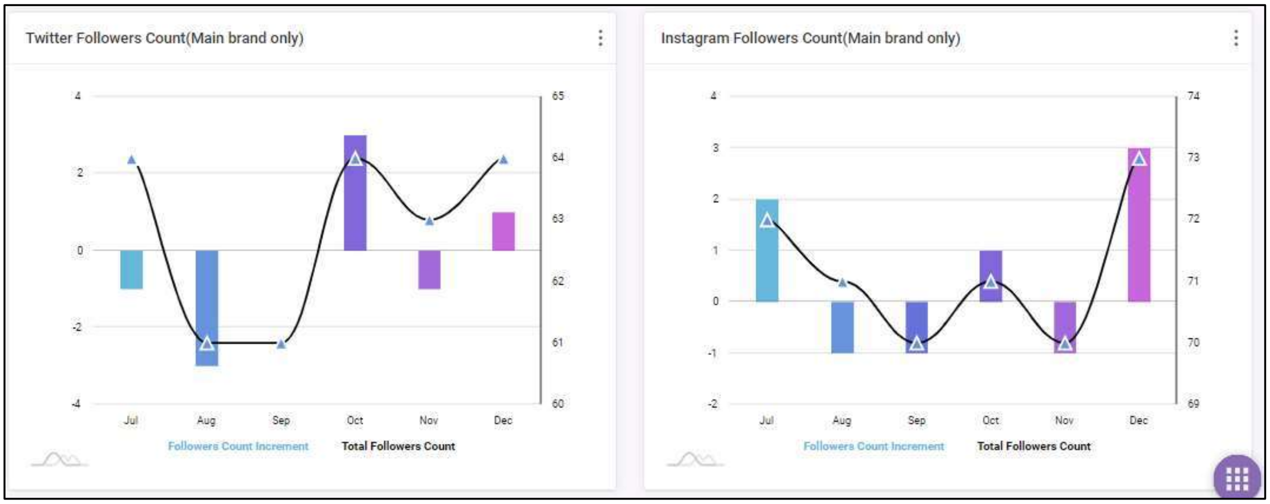


2)Followers/Fans Count

The report contains Twitter followers count and Fb page likes counts; it also includes followers/ fans month-wise increment charts.

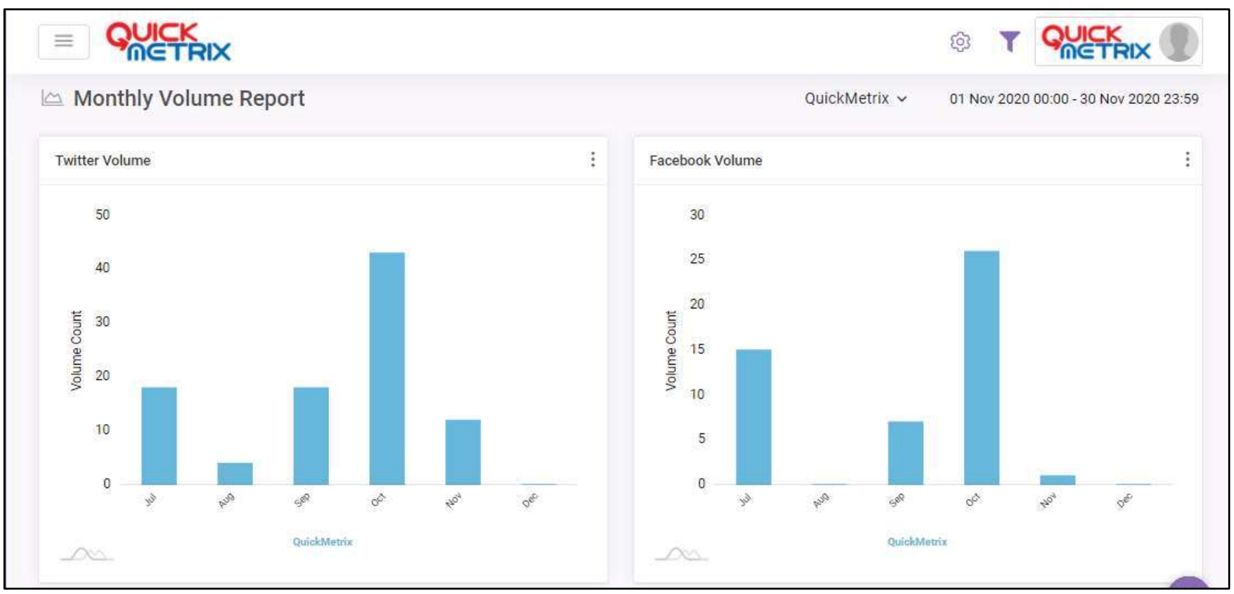
Note: - Select filter to see competitor's data





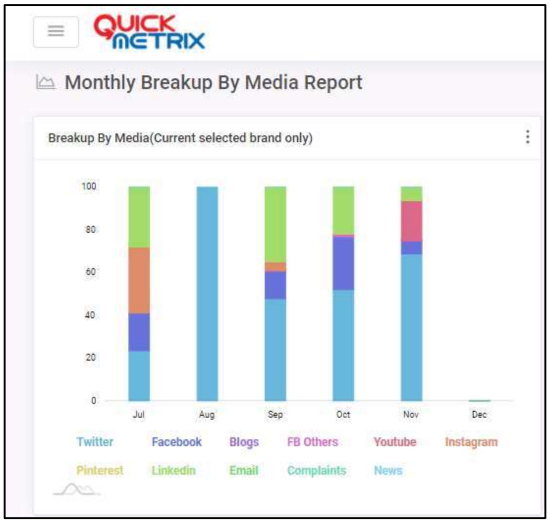
3)Volume Report

Compare multiple platforms month-wise volume data with a monthly volume of brand and competitors



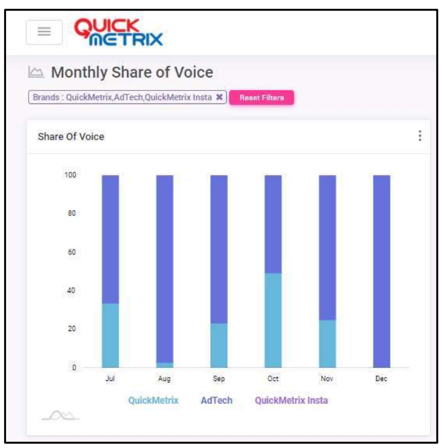
4) Breakup by Media

Month wise Breakup by media report for Brand



5)Share of voice/volume

Correlate month-wise share of voice/volume with brand and competitors.

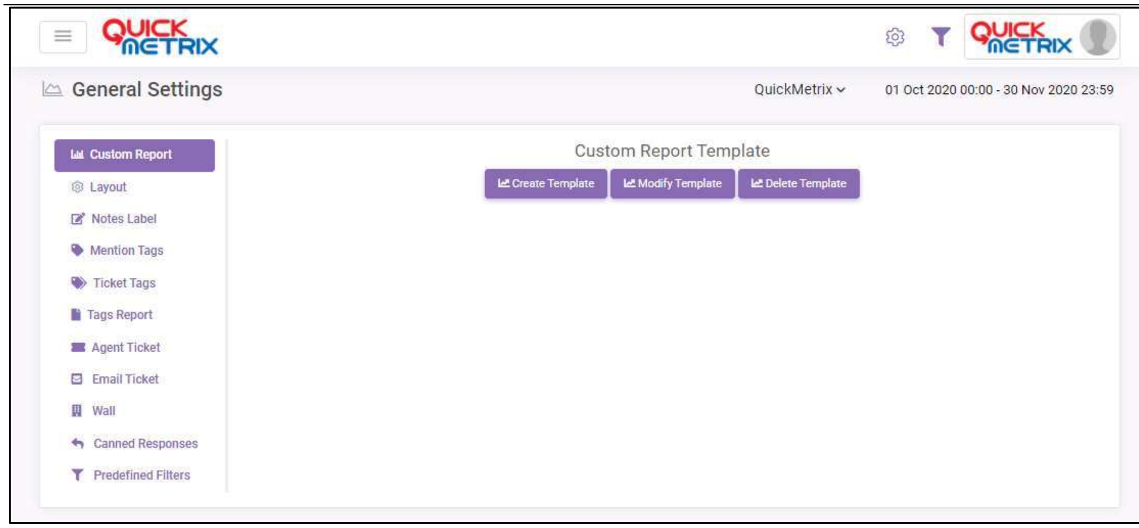


➢Custom Report – Process

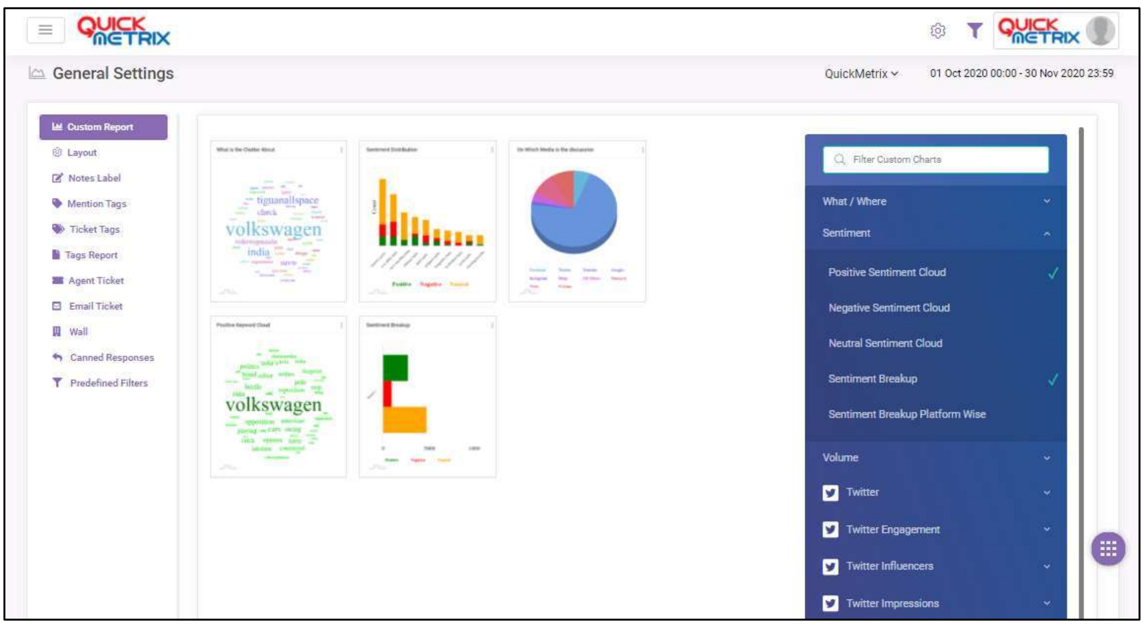
Custom report is an easy method to access reports from an older date range. Instead of selecting reports one by one from the Reports section, you can just run the custom report selecting the charts you need and for the date range that's required.

Step by step method is explained below:

- Click on Settings and then click on Custom Report under General Settings

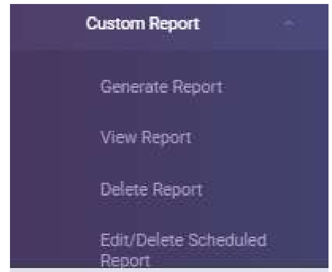


- Click on Create Template

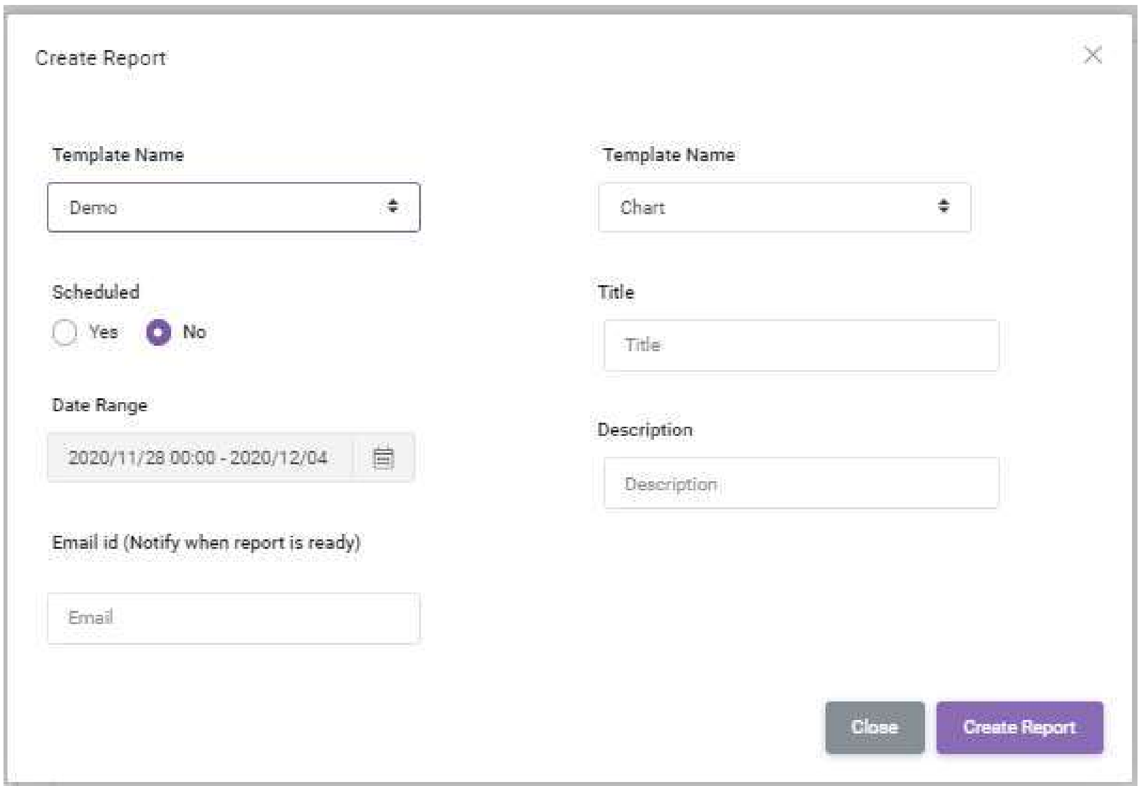


- Select the Charts to Generate report
- Click on Create template and save template with a name [Eg: - Demo].

- Click on Reports- Custom Report – Create Report

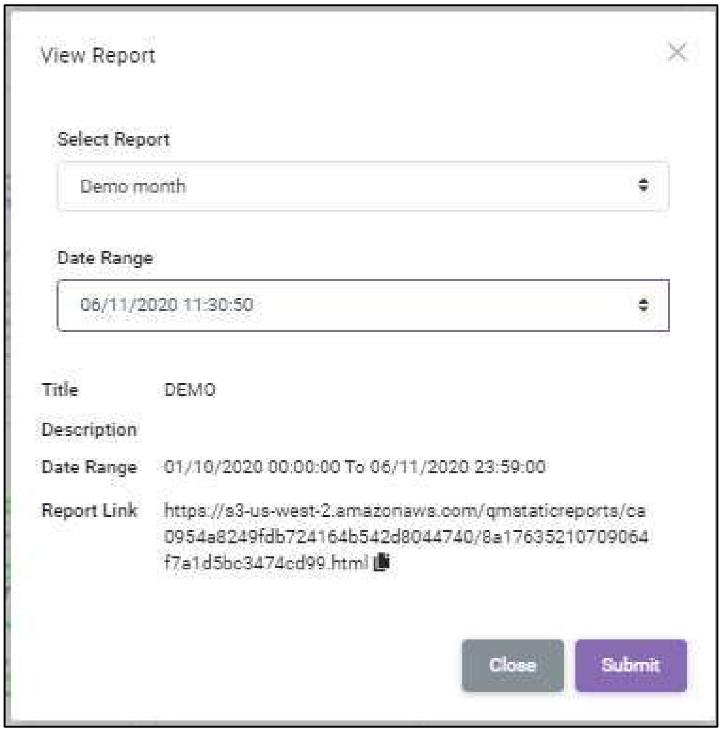


- After clicking on Create report the Below screen would be Displayed

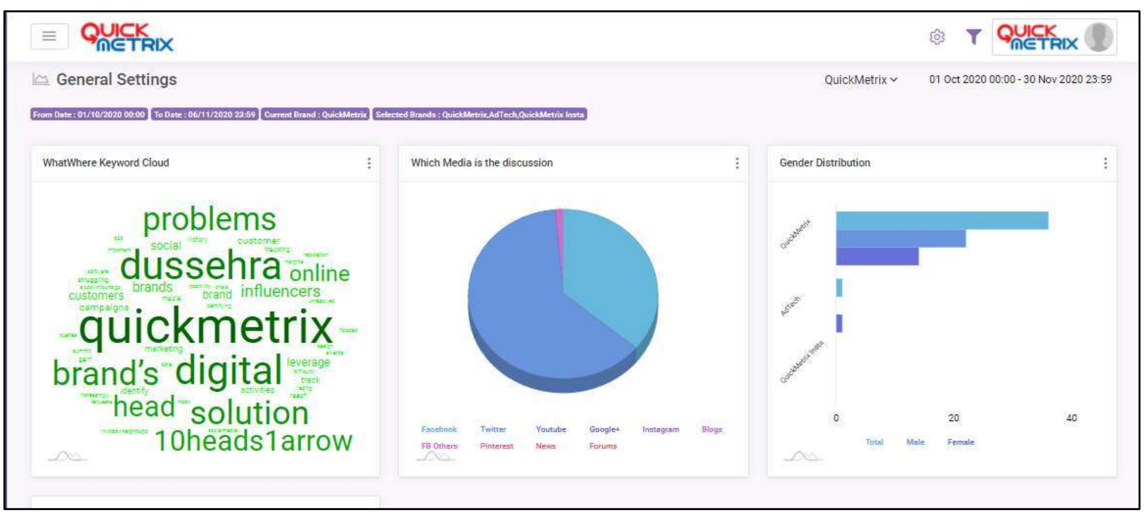


- Select the template name (e.g. – Demo)
- Select the frequency (e.g. – Custom Date) insert the date range and time (From Date – To Date) you wish to generate the report.
- Enter the E-mail Id to get notify when the report is ready
- Title and Description are optional
- Click on create report. Once the report is created a notifying mail would be Sent to the E-mail Id which would contain the report link.

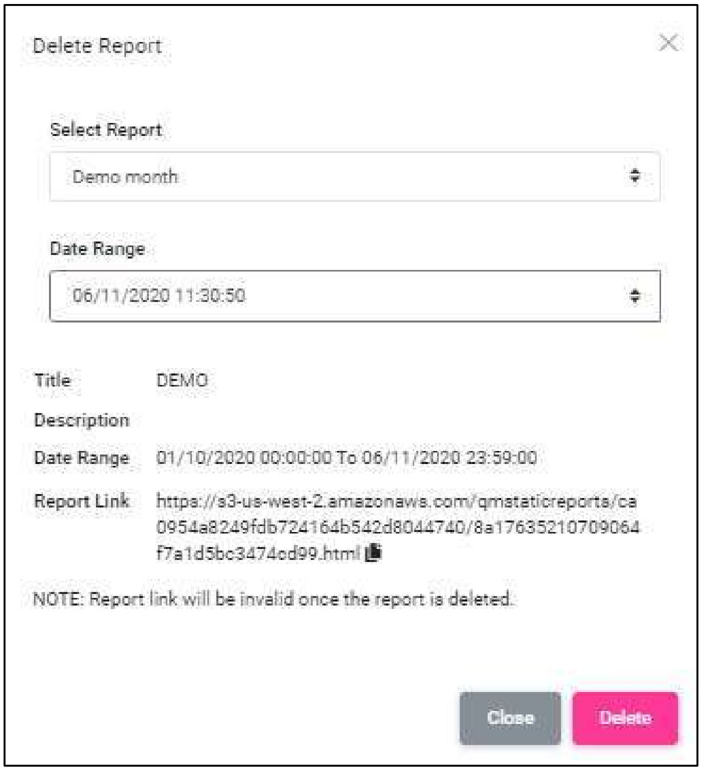
- To view the Report in QuickMetrix. (After getting notifying email). Click on Custom Report – View Report



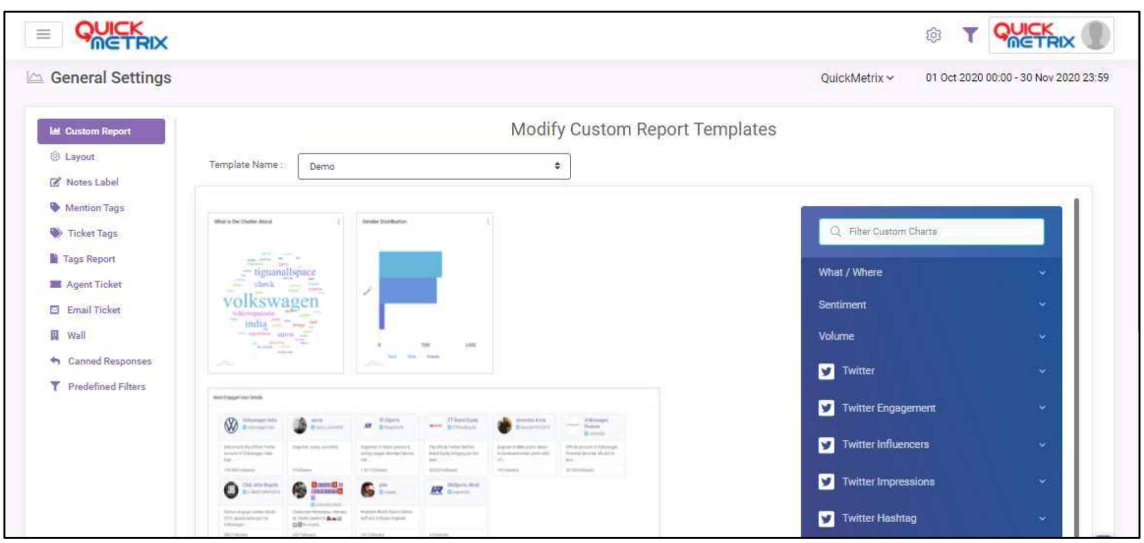
- Choose report name (e.g. – Demo). Select the date and time of the report generated as shown in the image.
- Click on Submit
- Custom report with selected chart for the template (Eg:- Demo) with the date range selected while creating report will be displayed



- To delete the report, you can click on Custom Report – Delete Report.



- Select the Report and Choose the date and time the report was generated and click on Delete.
- The report would be deleted.
- To modify the template of custom Report. In Setting – General Setting. Click on Custom report and then click on Modify Template.

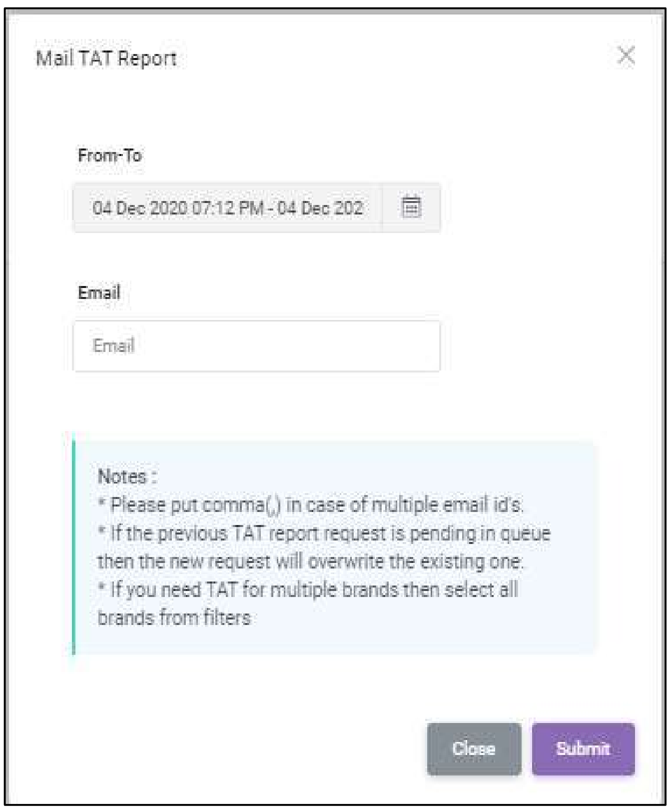


- Select the Template Name
- Select/ Deselect the charts you wish to Add/Remove from the Template
- Click on Save - To save the Modification done in the template

- To Delete the template, Click on Delete Template in Custom Report – General Settings

- Select the template you wish to delete.

➢TAT Report



- Turn Around Time
- For TAT Report the Client need to add the date range and E-mail. The report world me mails to the respective E- mail ID.
- The TAT Report Excel Sheet Includes – Author Name Turn Around Time, Type (Complaint, Query, etc), Response post, Response time, Status (Responded / Pending), Source (Facebook.com, FB DM, Twitter. Com, etc), Links, Snippet, etc.

Month	Author Na	Source	Date Discover	Date Publish	Permal	Snippet	Status	Type	Sentiment	Response Post	Canned	TAT
June	Abhishek som	Twitter.com	2018-06-18 17:44	2018-06-18 17:4	https://ww	@Syskaccessories sir I recei	Pending	Complaint	negative	@abhishek_somar	2018-06-19	19:41:45
June	Abhishek som	Twitter.com	2018-06-19 09:33	2018-06-19 09:3	https://ww	@Syskaccessories sir the I ha	Responded	Complaint	negative	@abhishek_somar	2018-06-19	3:47:26
June	Abhishek som	Twitter.com	2018-06-19 09:48	2018-06-19 09:4	https://ww	@Syskaccessories dear sir in	Responded	Complaint	negative	@abhishek_somar	2018-06-19	3:37:21
June	Ramji	Twitter.com	2018-06-20 09:30	2018-06-19 18:4	https://ww	@Syskaccessories When are	Responded	Request	neutral	@r4ramji Hi @r4ra	2018-06-20	2:51:14
June	Abhishek som	Twitter.com	2018-06-20 14:41	2018-06-20 14:4	https://ww	@Syskaccessories Dear sir it	Responded	Complaint	neutral	@abhishek_somar	2018-06-20	0:33:16
June	Shakir Vorajee	Twitter.com	2018-06-21 10:25	2018-06-21 10:2	https://ww	@Syskaccessories Worst Pro	Responded	Complaint	negative	@shvorajee Hi Sha	2018-06-21	2:11:23
June	Reshu	Twitter.com	2018-06-22 09:30	2018-06-21 20:0	https://ww	@Syskaccessories Team, PL	Responded	Query	neutral	@baranwal_gudiya	2018-06-22	3:48:51
June	Reshu	Twitter DM	2018-06-22 09:30	2018-06-21 20:0	https://ww	@Syskaccessories Team, Ple	Responded	Query	neutral	@baranwal_gudiya	2018-06-22	3:56:37
June	Govind Jha	Twitter.com	2018-06-22 13:24	2018-06-22 13:2	https://ww	@Syskaccessories I bought s	Responded	Complaint	negative	@Govindjha255 Hi	2018-06-23	21:58:55
June	Vikas Chaudh	Facebook.c	2018-06-05 09:30	2018-06-04 20:3	https://ww	Made in china low quality prod	Responded	Complaint	negative	Deepak S Chauhar	2018-06-05	5:17:18
June	Manjusha Jain	Facebook.c	2018-06-12 09:30	2018-06-11 21:2	https://ww	Any winners ?	Responded	Query	neutral	Hi Manjusha Jain,	2018-06-12	4:06:45
June	Yogesh Goyal	Facebook.c	2018-06-14 09:30	2018-06-13 23:4	https://ww	Bought syska power bank in n	Responded	Complaint	negative	Hi Yogesh, we reg	2018-06-14	3:31:53
June	Yogesh Goyal	Facebook.c	2018-06-15 18:16	2018-06-15 18:1	https://ww	Your customer service is pathe	Pending	Complaint	negative	Hi Yogesh, we reg	2018-06-19	3 days, 21:02:5
June	Chiranjit Kedia	Facebook D	2018-06-18 09:30	2018-06-17 14:3	http://www	Syska Accessories: Mobile ba	Responded	Query	neutral	Chiranjit Kedia: Hi	2018-06-18	4:50:21
June	Vinod Chouha	Facebook D	2018-06-21 09:30	2018-06-21 07:2	http://www	Syska Accessories: Hiii	Responded	Query	neutral	Vinod Chouhan: Hi	2018-06-21	3:12:00
June	Vivek Mishra	Facebook D	2018-06-22 09:30	2018-06-22 01:4	http://www	Syska Accessories: Hi	Responded	Query	neutral	Vivek Mishra: Hi V	2018-06-22	3:31:05
June	Ates India	Facebook D	2018-06-25 14:29	2018-06-25 14:2	http://www	Syska Accessories: We need	Responded	Query	neutral	Ates India: Hi Ates	2018-06-25	1:26:00
June	Ates India	Facebook D	2018-06-25 15:56	2018-06-25 15:5	http://www	Syska Accessories: 98311226	Responded	Query	neutral	Ates India: Hi Ates	2018-06-25	2:05:22

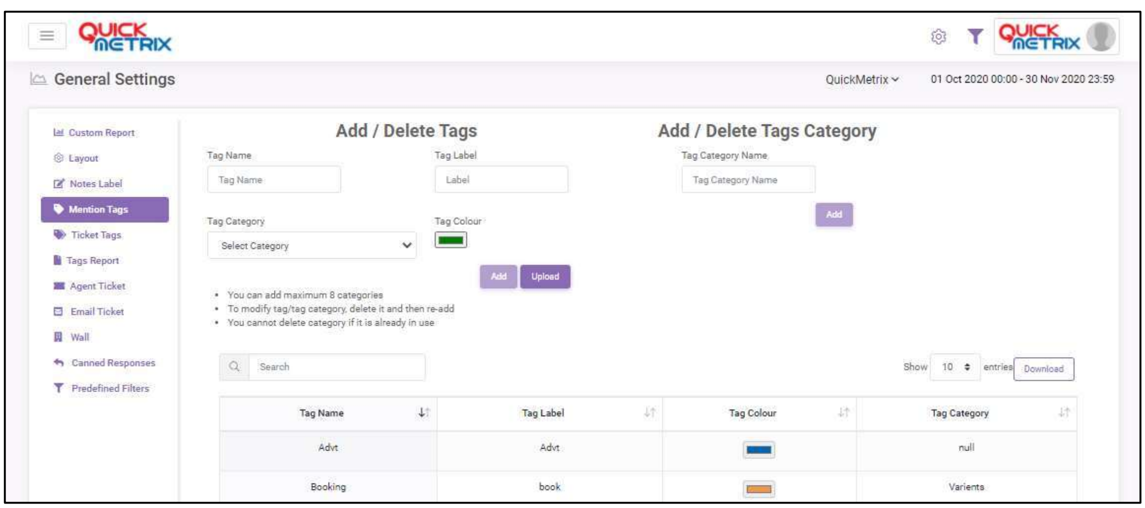
➢ Tags Report

A tag is a keyword or term assigned to a piece of information. This kind of data helps describe an item and allows it to be found again. The set of tags is known as a category in QuickMetrix. This feature will help you improve the quality of your social listening. You will be able to define a specific action you would like to be applied on all new, or even past results. It is an incredible time saver. Tags help you to refine sentiment analysis, remove irrelevant or unnecessary data from the conversations

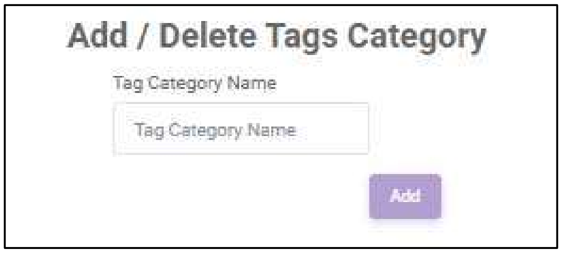
Tags - Tags is basically used as a label attached to posts/messages/videos/comments for the purpose of identification.

How to Generate new tag?

- Click on Settings right corner.
- Click on Mention Tags under General Settings



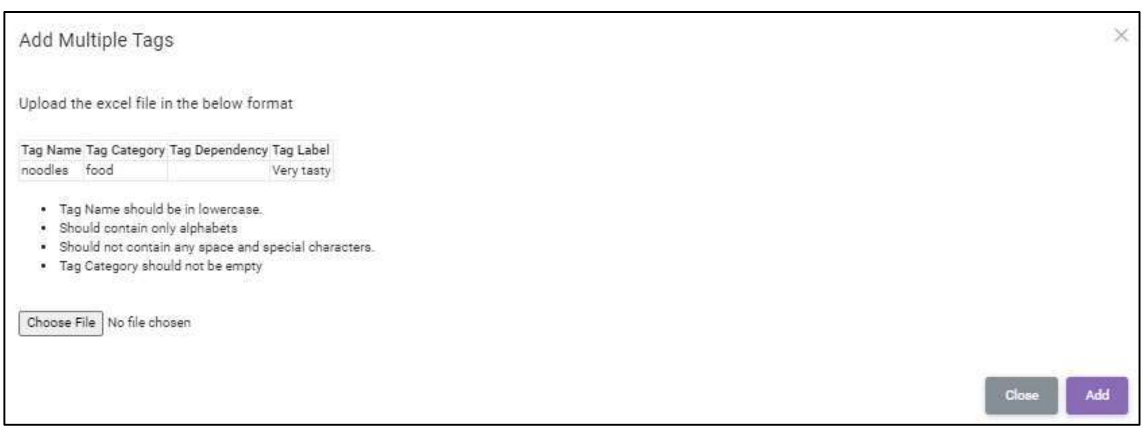
- Under Add/delete tags category enter the category name of your choice and click on Add.



- Move to Add/Delete Tags and enter the Tag name as per your preference and select the category. You can additionally give a label and choose a colour to differentiate.

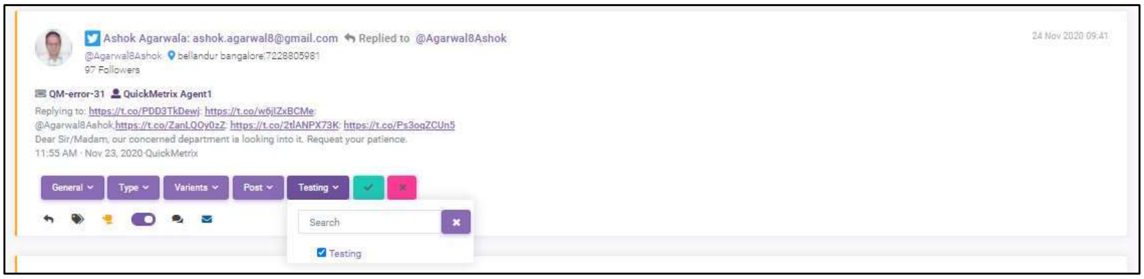
Note: -

- *You can add maximum 8 categories*
- *To modify tag/tag category, delete it and then re-add*
- *You cannot delete category if it is already in use*
- *You can add as many as tags you need.*



To add tag/ label the conversation – Go to Social Inbox

Click on the tags icon  of the conversation you wish to tag.



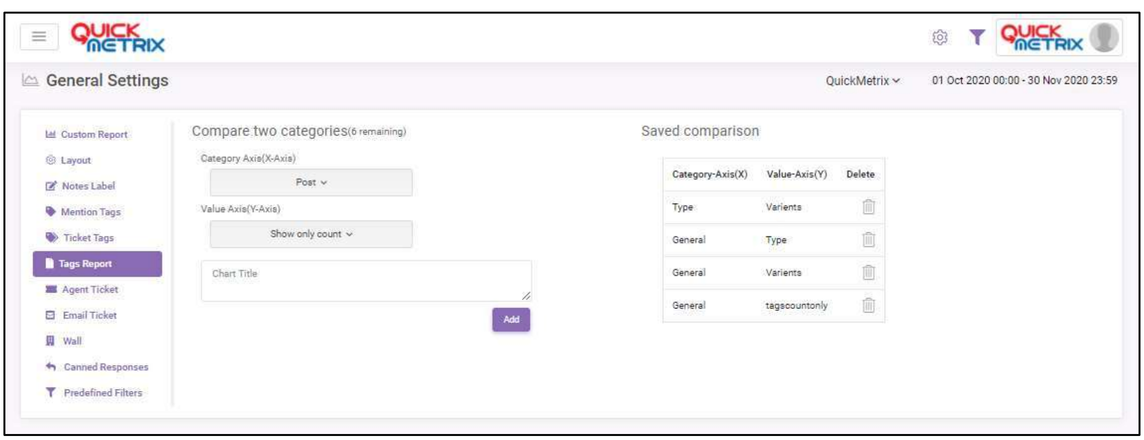
- Select Tag Name from the Tag Categories (for e.g. – Testing)
- Click the tick button to add tags

- Tags would be added to the conversation

Note: - Tag the main tweet and a dialog box would be displayed on the screen, which mention the present No. of retweets and if you want to tag all the retweets. Click on 'OK' to tag all the retweets and click on 'Refresh page' all the retweets would be tagged. That will save your time of manually tagging each retweet.

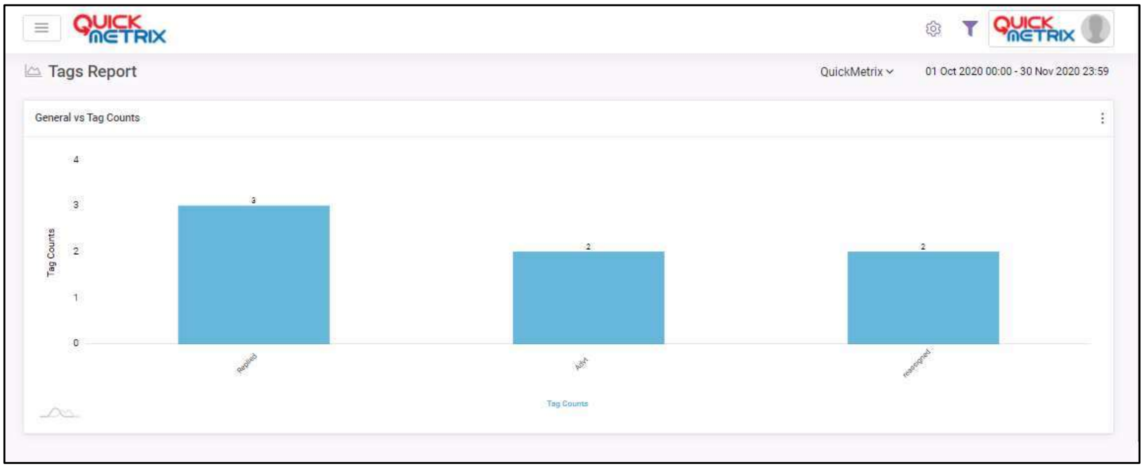
To Create Tags Report –

Reporting on tags is tricky in Insights. There can be any number of tags in a category at the same time. To make this possible; tags report gives you the ability to report.



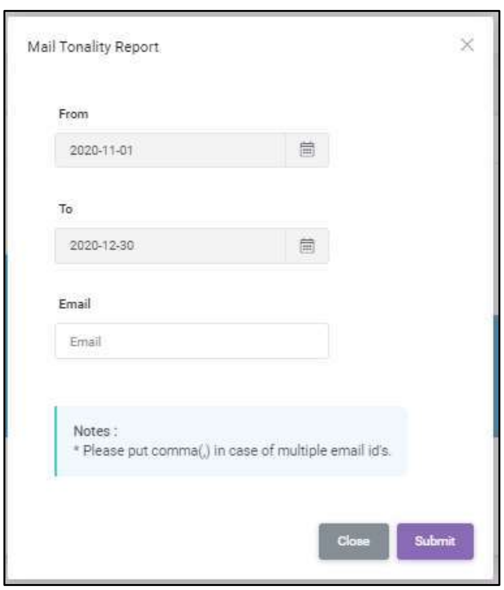
- In settings under the settings tab, there is an option for tags report where you can compare two categories or a single category with its count or sentiments. Refer to the image. [eg: - Select a category on the x-axis (General) and compare it with another category on the y-axis (Type) or analyze it with tags (counts/sentiments) and add the chart title.]
- Click on 'add' button and view the result in tags report.

Report Tab – Tags Report

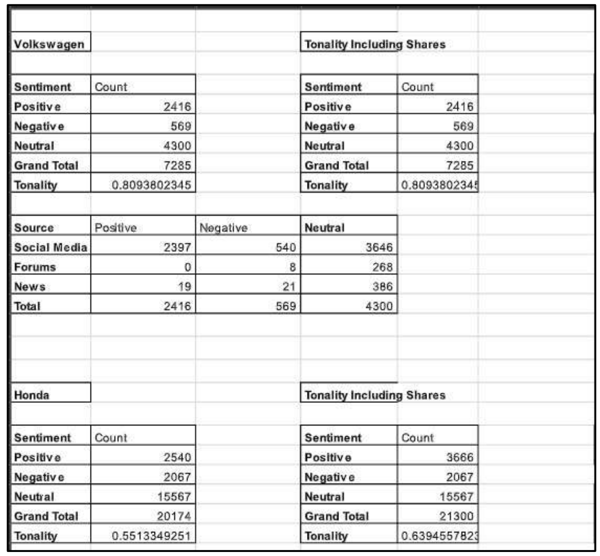


- “Tags Report” in the ‘Report’ tab is the comparison view (e.g.: - Type vs tag Count) to analyse the topics of conversations. Slicing and dicing the conversations drives better results, with the help of Tags report.

➢Tonality Report



- For Tonality Report you need to add the date range and E- mail ID. The report would be mailed to the respective E- mail ID in an excel sheet format.



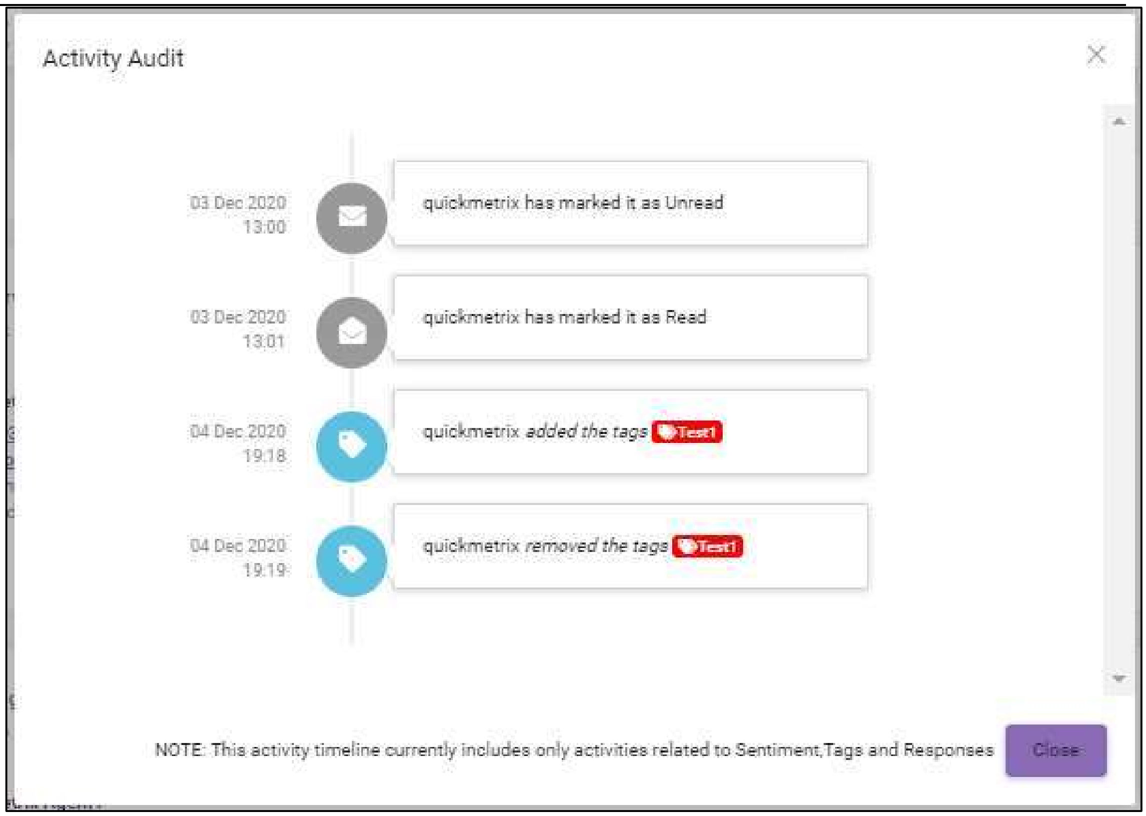
Volkswagen			Tonality Including Shares	
Sentiment	Count		Sentiment	Count
Positive	2416		Positive	2416
Negative	569		Negative	569
Neutral	4300		Neutral	4300
Grand Total	7285		Grand Total	7285
Tonality	0.8093802345		Tonality	0.809380234[illegible]
Source	Positive	Negative	Neutral	
Social Media	2397	540	3646	
Forums	0	8	268	
News	19	21	386	
Total	2416	569	4300	
Honda			Tonality Including Shares	
Sentiment	Count		Sentiment	Count
Positive	2540		Positive	3666
Negative	2067		Negative	2067
Neutral	15567		Neutral	15567
Grand Total	20174		Grand Total	21300
Tonality	0.5513349251		Tonality	0.639455782[illegible]

- The Tonality Report Excel Sheet Includes – Positive, Negative, Neutral, Total and Tonality score (Tonality with shares and without shares count) for Brand and its competitors.

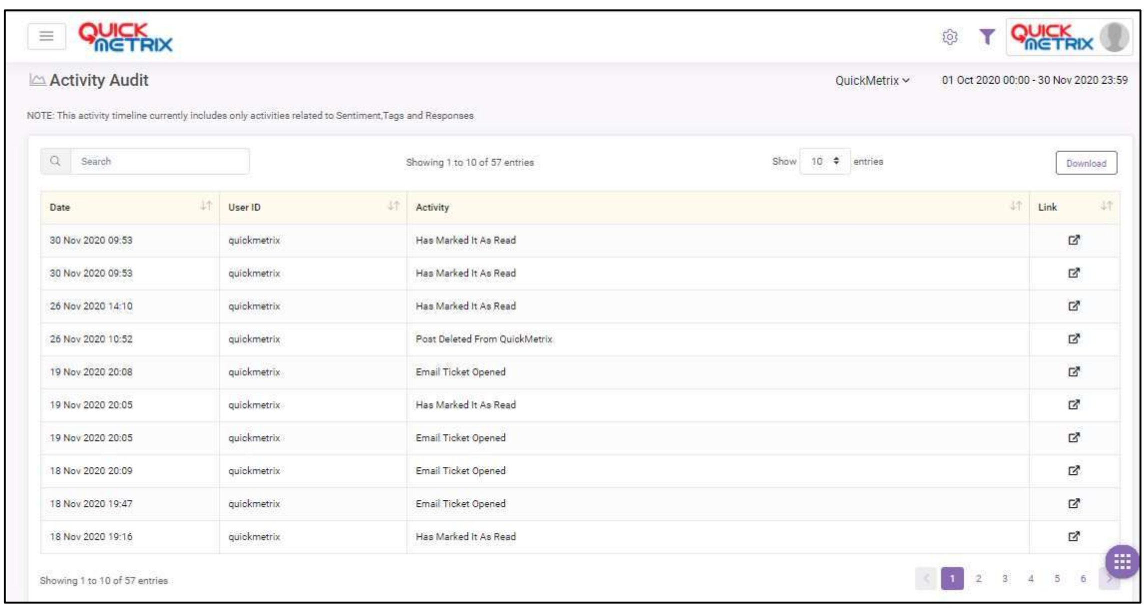
➢Activity Audit

The activity audit report is the lists of all the activities by the accounts related to sentiments, tags, and responses, which helps to monitor the actions in QuickMetrix.

- You can see an option "Activity Audit "on every chatter. Clicking on this icon would give you the logs as shown below.



- View all the activity logs in one report. Under Reports click on Activity Audit and you can view the logs table



Note: This activity timeline currently includes only activities related to Sentiment, Tags and Responses

Publish

Publish & Scheduling

Content, Video and image posting are possible from QuickMetrix platform from publish tab.

- Maker – Checker Control for Publishing.
- This allows online approval of content before it is published on the social media platforms

- select multiple images for Twitter and LinkedIn posts in ‘Publish tab’ while composing posts.
- The below screen appears after clicking on compose and next click on 'add image' icon, select the video you want to upload, add content and select the media platforms (FB, Twitter) then click on 'post 'or you can 'schedule' the post, all from a single platform.

(Note- Posts without images and videos can be posted for LinkedIn from QuickMetrix.)

Ticket (Additional Feature)

Ticketing System: -

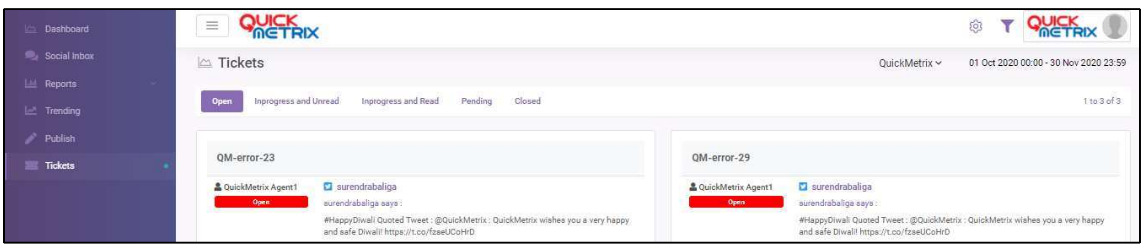
Agents should be allowed to focus on constantly improving customer experience. Instead, most of their time is spent unearthing buried issues, prioritizing them, and making sure that no one else is working on the same issue. There is no more switching between multiple tools. No more missing out on follow-ups and delaying replies.

Agent ticketing system of QuickMetrix act as a shared inbox for all your customer's questions and concerns for Email, Twitter and Facebook. This way, the agent is always provided with a consistent ticket, making ticket management much easier for the agent to help the customer more quickly solve the issue to their satisfaction.

Two types of Accounts are created in QuickMetrix: -

1. Supervisors Login

Supervisors login has access to all features like, Reports, Social Inbox, Ticket Id creation, Feedback form view, etc.



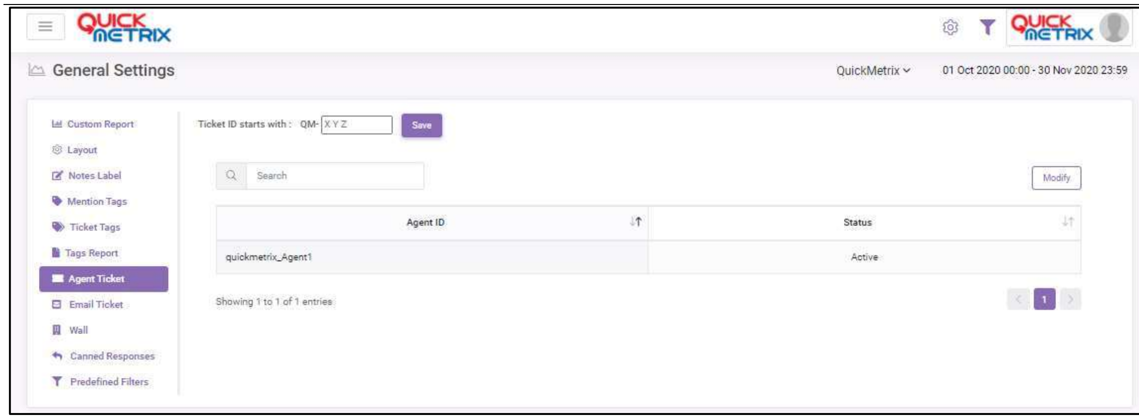
2. Agent login’s

An Agent’s login has access only to the ‘Ticket view’

▪ Ticket ID Generation: -

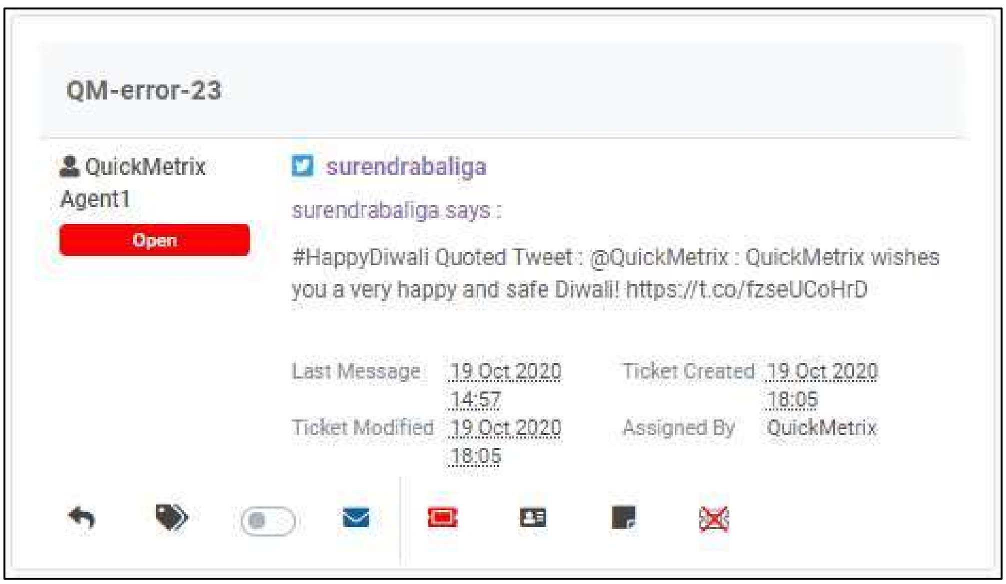
To add start name to Ticket ID generation *(Which can be done only from Supervisors login)*

Click on Setting ➡ General Setting ➡ Ticketing System



Create ‘Ticket ID’ by adding name in “Ticket ID starts with” (For eg:- QM – gen) and then click on save the Id would be saved as (For eg:- QM -gen- XXXX)

▪ Ticket Specifications: -



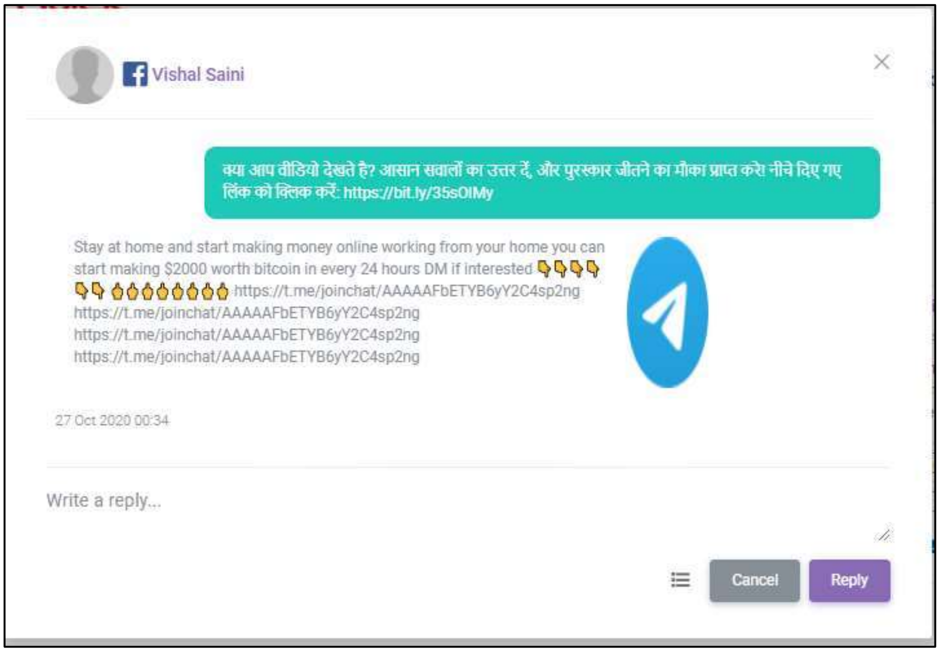
- By click on the cross-icon ticket can be deleted from QuickMetrix

- Ticket Icon [Changes Colour from Red (Open) to Green (Closed)]

- By clicking on the reply icon an agent can reply to it customer

- View Conversation

- View Feedback Form Icon is Visible only in the supervisor Login (once a customer fills the survey form the 'view feedback' icon is visible)



- **Ticket Action Record: -**

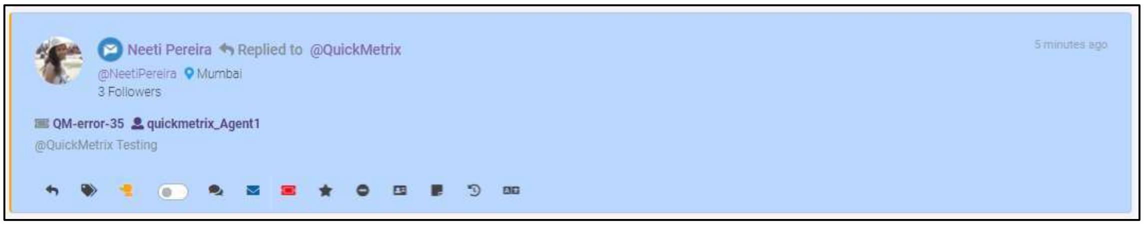
Last Message	19 Oct 2020 14:57	Ticket Created	19 Oct 2020 18:05
Ticket Modified	19 Oct 2020 18:05	Assigned By	QuickMetrix

On the left hand of the ticket you can see the last customer message date and time, ticket modified time, ticked created date and time, and assigned by (i.e. Supervisors name)

Ticketing System: -

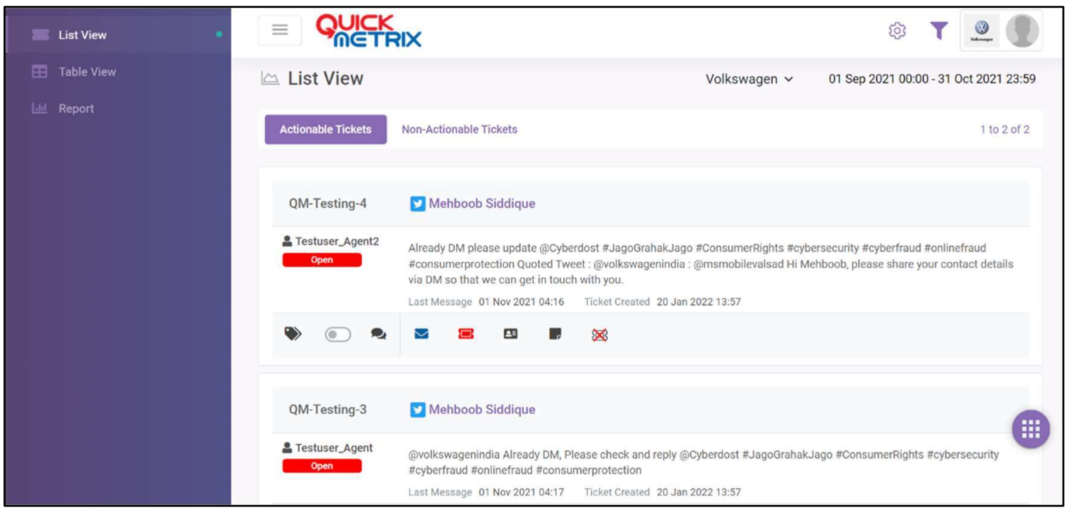
Once a Comment/Reply/DM is sent by a customer to the registered platform (Facebook, Twitter, etc.). It takes around some time to come to Social Inbox in QuickMetrix once refreshed.

After a minute ticket number and agent name gets assigned. The auto assigning uses 'Round Robin' (RR) process for ticketing. And it can be seen in Supervisor and Agent login's to whom the ticket is assigned.
(Note: - It is mandatory that Agent/ Supervisor refreshes the screen frequently for conversational updates)

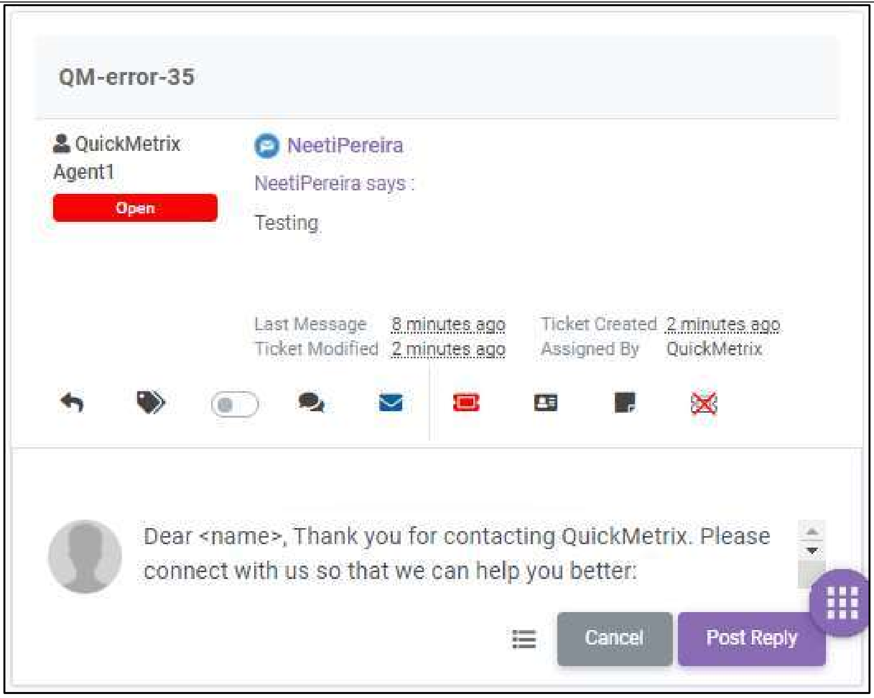


The assigned ticket is seen in 'Ticket Tab'.

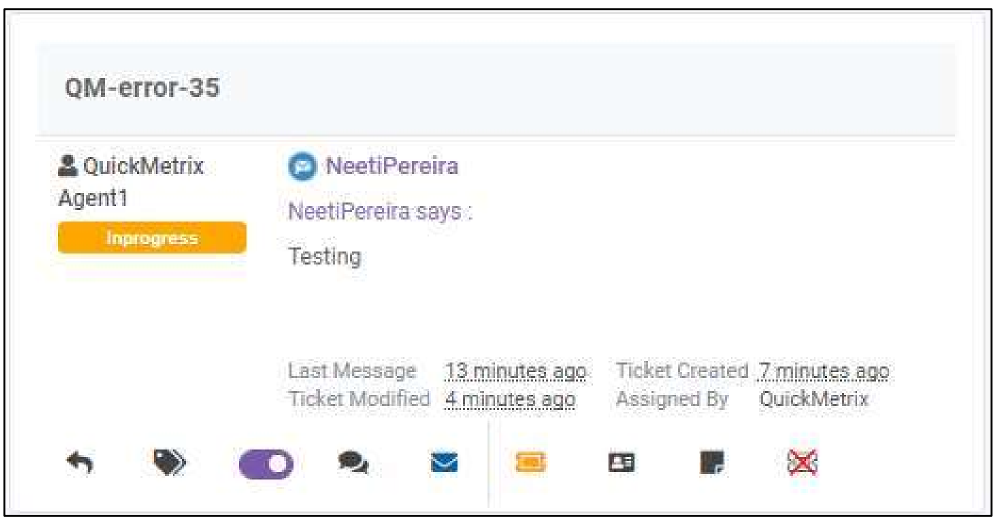
- Once the ticket is assigned it gets 'Open' and the colour of the Ticket changes to 'Red'. Ticket is Auto assigned to 'QuickMetrix Agent1' and is marked as 'Unread'



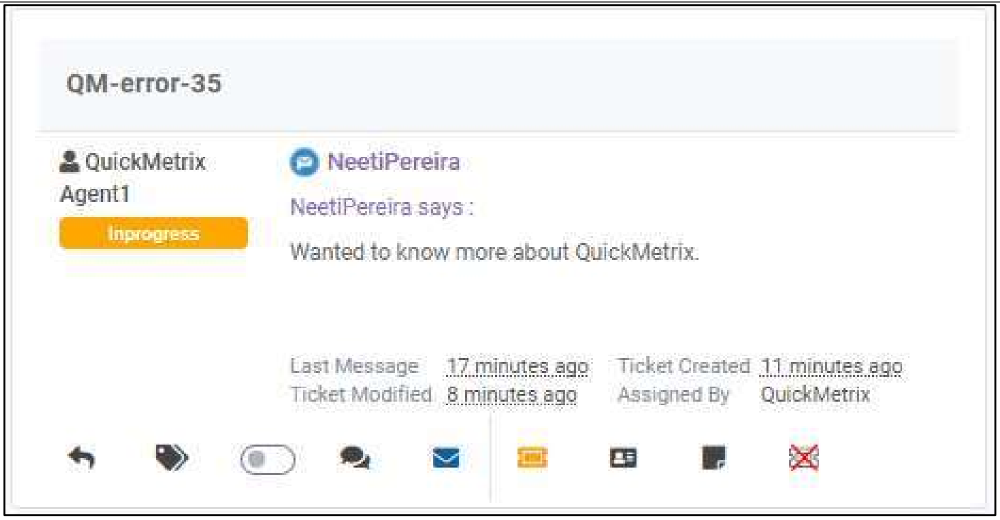
- The assigned agent (e.g.: QuickMetrix Agent1) can click on 'Reply' icon, to reply the customer



- Once the Agent replies the customer the ticket automatically changes its status to ‘In Progress’ and ‘Read’, the ticket colour is changes to ‘Yellow’

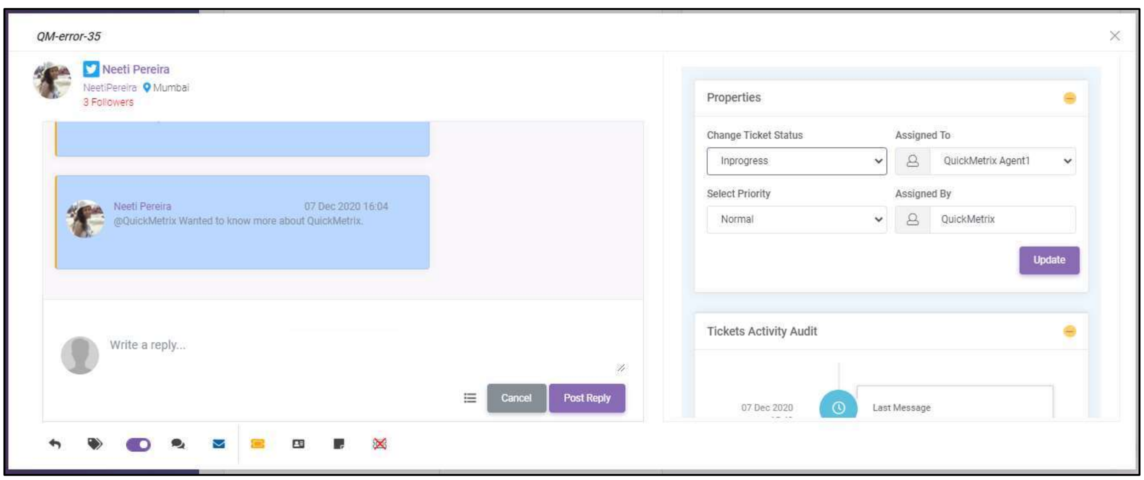


- When a customer replies the conversation is automatically marked to ‘Unread’

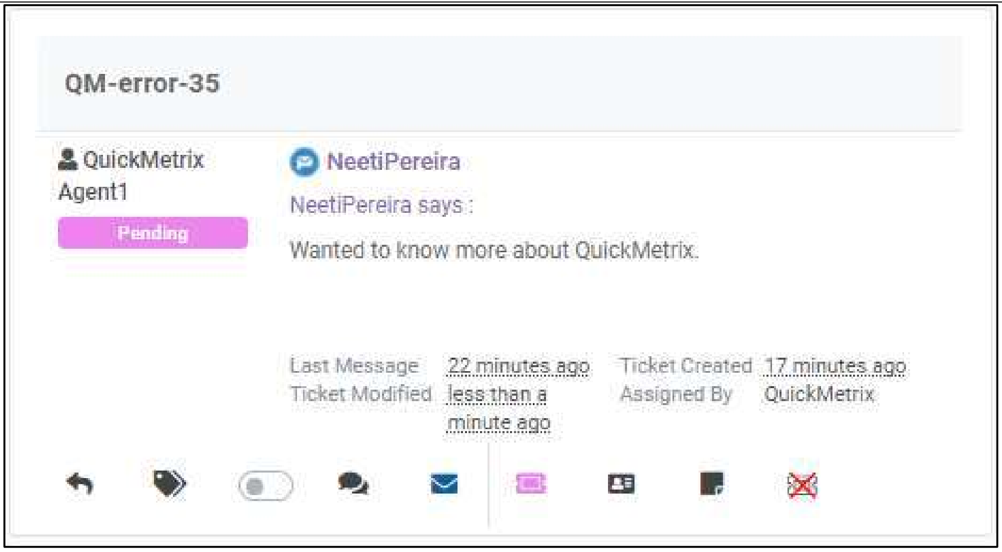


Pending and closed should be manually done (depending on agent's requirement).

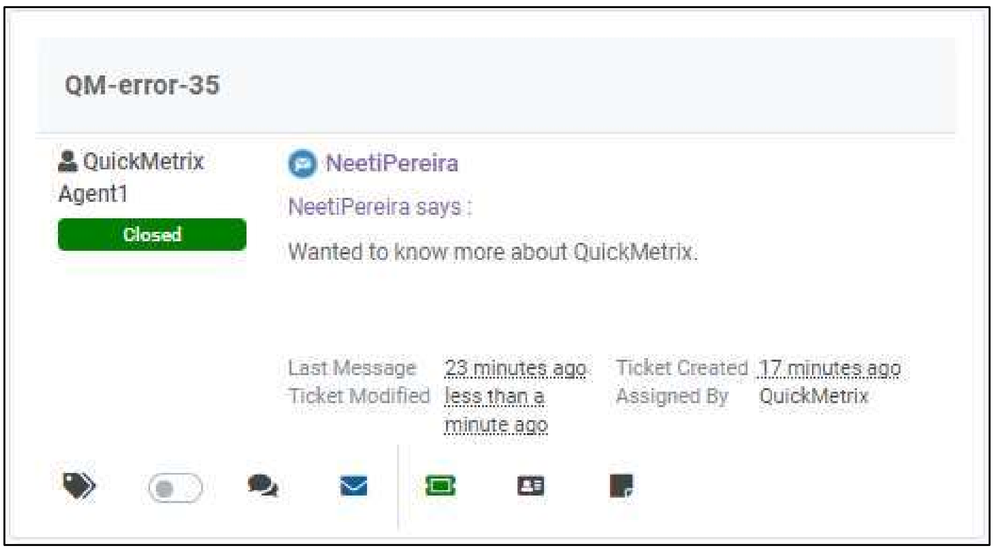
- To change the status manually the agent needs to click on the ticket Icon, a dialog box would be displayed where the status of the ticket can be changed and to save click on 'Update'. As shown Below



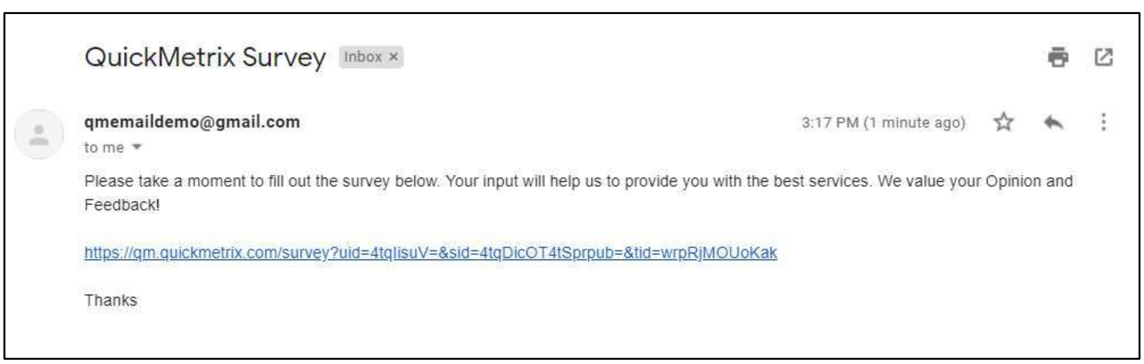
- If the agent selects the ticket status as pending, then the status of the ticket would be changed to pending and the ticket colour will change to 'Purple'



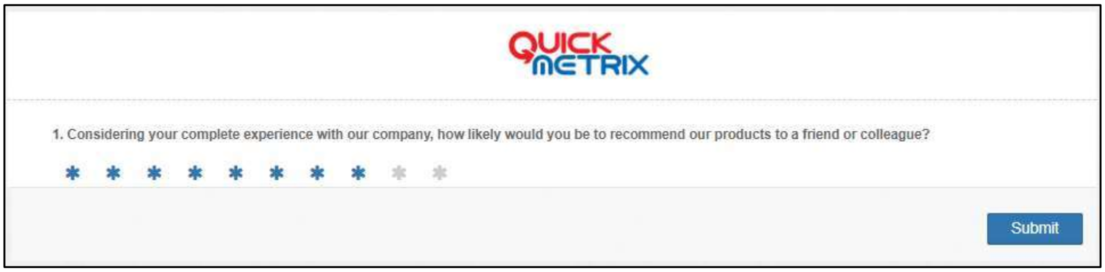
- Once the agent changes the ticket status to ‘Closed’, the colour changes to ‘Green’



- When the ticket is closed, a survey mail is sent to the customer, As shown in the below Image

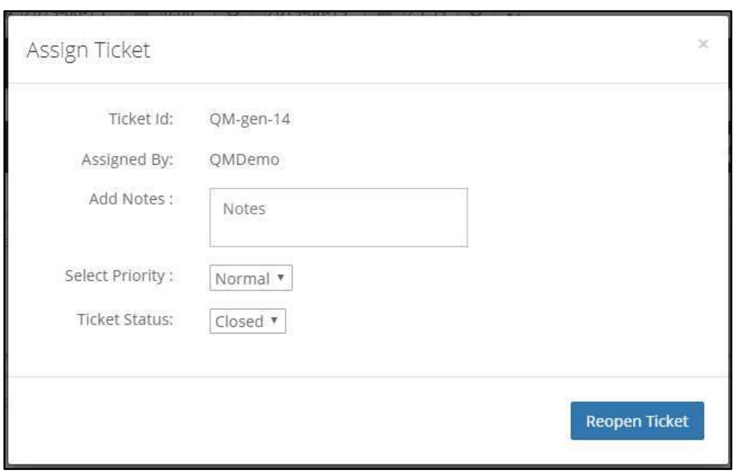


- Once the customer opens the give link, he/she need to feel the survey and click on ‘Submit’



- The survey Feedback Form will only be seen in the ‘Supervisors’ Login

- If you want to re-open the ticket, click on the ticket icon – a dialogue box will appear with a ‘Reopen’ Button



- If the customer replies on same email, then ticket will be assigned to agent who handles it initially.

(Note: -

1) *Likewise, ticketing operates for Facebook and Twitter platforms.*
2) *Auto-assignment of tickets is not enabled for Twitter/Facebook.*
   Reason: Several messages/comments/tweets may come in for these platforms, it is up to the supervisor/agent to decide if ticket creation is required. This evades unnecessary ticket creations.)

How to logout?

Once your work is done on the QuickMetrix application, it is important that you properly terminate the current session by clicking the Logout icon.
In ‘List Operations’, the button to terminate the current session (Logout) is also located.

Thank You