



**Conversational AI for Customer Success**

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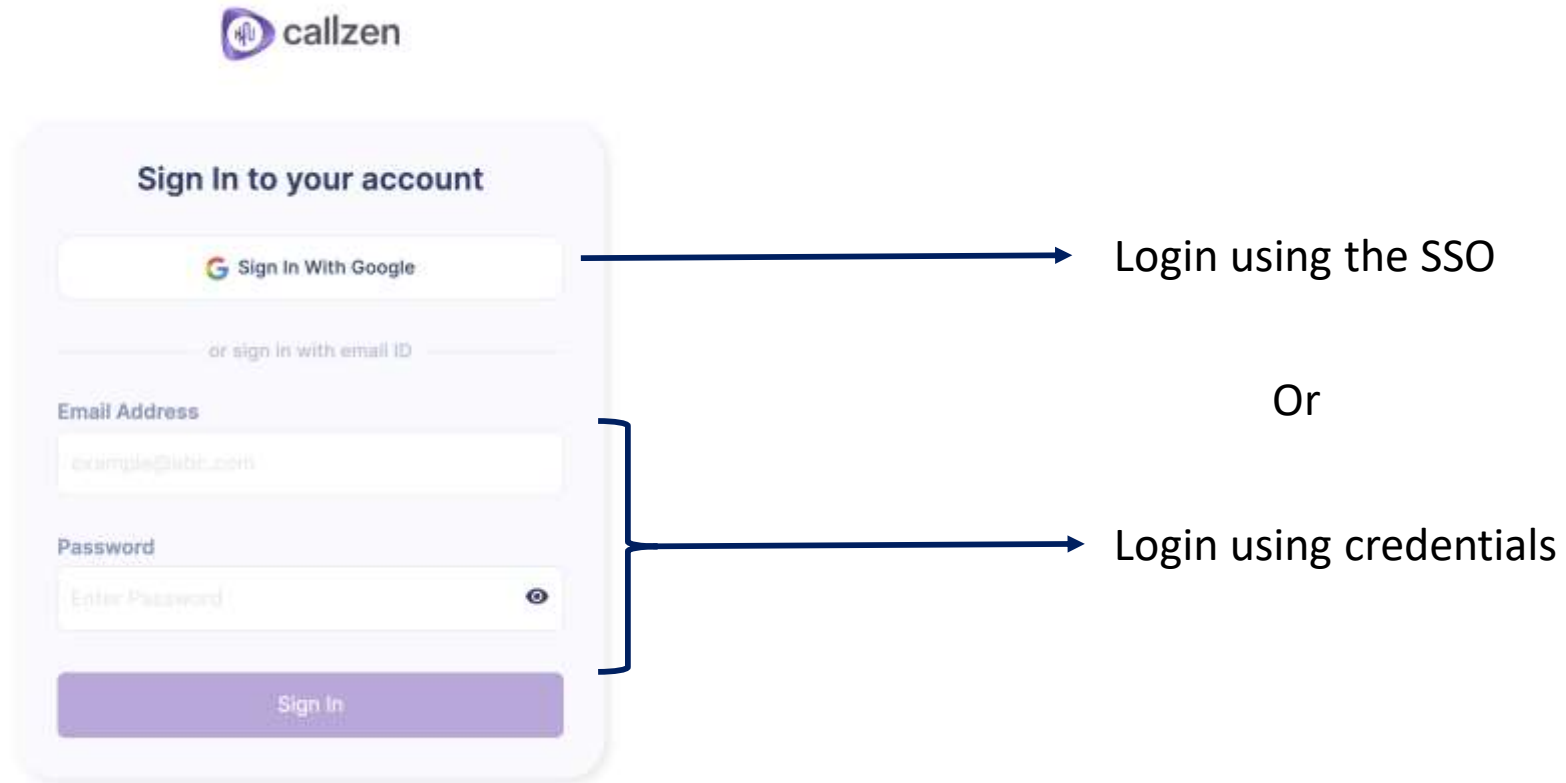
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Agent Section

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Automation

# User Login



The diagram illustrates the user login process for Callzen. It features a central login form with the following elements:

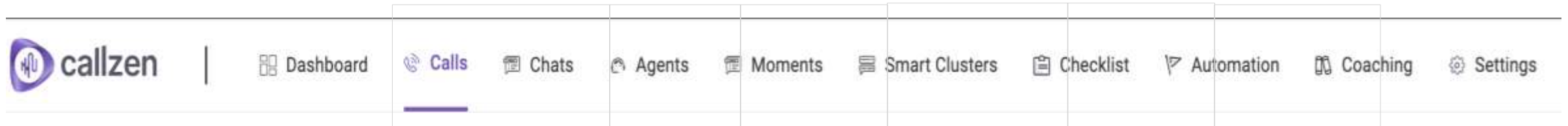
- Callzen Logo:** Located at the top left of the form.
- Title:** "Sign In to your account" centered at the top of the form.
- SSO Option:** A button labeled "Sign In With Google" with the Google logo, which is linked to the text "Login using the SSO".
- Separator:** A horizontal line with the text "or sign in with email ID" centered below it.
- Email Address Field:** A text input field containing the placeholder "example@abc.com".
- Password Field:** A text input field with the placeholder "Enter Password" and a toggle icon (an eye) on the right side.
- Sign In Button:** A purple button labeled "Sign In" at the bottom of the form.

Annotations on the right side of the form:

- An arrow points from the "Sign In With Google" button to the text "Login using the SSO".
- The text "Or" is centered between the two login options.
- A bracket groups the "Email Address" and "Password" fields, with an arrow pointing to the text "Login using credentials".

# Navigation

Use the tabs on top of the screen to navigate between sections



# Calls Page

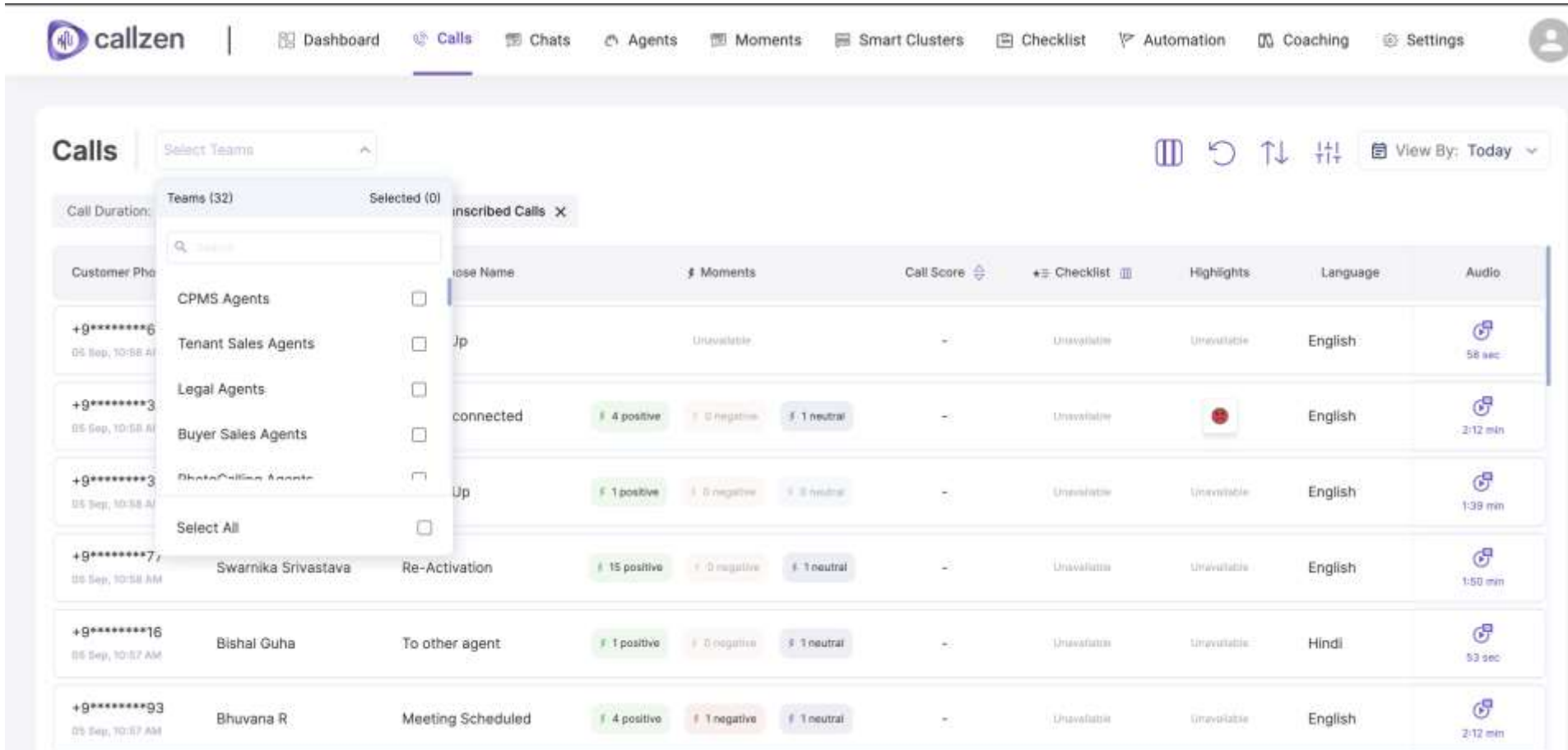
The user can see all the calls in the system on the calls tab

The screenshot displays the 'Calls' page in the Callzen interface. The top navigation bar includes 'Dashboard', 'Calls', 'Chats', 'Agents', 'Moments', 'Smart Clusters', 'Checklist', 'Automation', 'Coaching', and 'Settings'. The 'Calls' tab is active, and the page shows a list of call records for 'Tenant Sales Agents'. The table columns are: Customer Phone, Agent Name, Dispose Name, Moments (with sub-categories for positive, negative, and neutral), Call Score, Checklist, and Audio. The table contains six rows of call data.

Customer Phone	Agent Name	Dispose Name	Moments	Call Score	Checklist	Audio
+9*****57 05 Sep, 10:29 AM	Himadri Naik	Converted	1 positive, 2 negative, 9 neutral	45	45% Tenant Freedom Plan Checklist	4:35 min
+9*****26 05 Sep, 10:34 AM	MoumitaShome N...	INT-Pitched Relax	1 positive, 1 negative, 20 neutral	83	83% Tenant Relax Plan Checklist, 82% Tenant Freedom Plan Checklist	8:03 min
+9*****84 05 Sep, 09:52 AM	Vidyashri VikasBhovi	INT-Pitched Freed...	6 positive, 0 negative, 37 neutral	55	55% Tenant Freedom Plan Checklist	5:23 min
+9*****24 05 Sep, 09:47 AM	GodwinLuisCardoz...	INT-Pitched Freed...	0 positive, 0 negative, 1 neutral	9	9% Tenant Freedom Plan Checklist	1:14 min
+9*****16 05 Sep, 09:47 AM	Snehal Badadal	INT-Pitched Relax	3 positive, 2 negative, 18 neutral	85	67% Tenant Relax Plan Checklist, 64% Tenant Freedom Plan Checklist	8:50 min
+9*****64 05 Sep, 09:45 AM	SenjutiMandal NBT...	Call Back	2 positive, 1 negative, 12 neutral	55	55% Tenant Freedom Plan Checklist	14:27 min

# Calls Page: Team Selection

To filter the calls by teams, select the team(s) from the team selector



The screenshot displays the Callzen interface for the 'Calls' page. A navigation bar at the top includes 'Dashboard', 'Calls', 'Chats', 'Agents', 'Moments', 'Smart Clusters', 'Checklist', 'Automation', 'Coaching', and 'Settings'. The main content area features a 'Calls' header with a 'Select Teams' dropdown menu. The dropdown is open, showing a list of teams: 'CPMS Agents', 'Tenant Sales Agents', 'Legal Agents', 'Buyer Sales Agents', 'BhatCallZen Agents', and 'Select All'. Each team has a checkbox next to it. The background shows a table of call records with columns for 'Customer Phone', 'Agent Name', 'Moments', 'Call Score', 'Checklist', 'Highlights', 'Language', and 'Audio'. The table contains several rows of call data, including one for 'Swarnika Srivastava' and another for 'Bishal Guha'.

\* A person will only be able to see the teams, he/she is a part of

# Calls Page: Moments Overview

To view the tagged Moments against a call, hover over the Positive/Negative/ Neutral Chip in Moments Column

The screenshot shows the Calzen interface with the 'Calls' tab selected. The page displays a list of calls with columns for Phone, Agent Name, Dispose Name, Moments, and Call Score. A tooltip is visible over the '1 positive' chip for the first call, listing 17 tagged moments.

Phone	Agent Name	Dispose Name	Moments	Call Score
***85 -07 330	SkSayefAli NBTS2...	INT-Pitched Relax	1 positive, 1 negative, 12 neutral	92%
***17 -47 330	ShaikMohammadr...	INT-Pitched Mons...	3 positive	100%
***97 -88 330	JatinKumar NBTS2...	INT-Pitched Mone...	0 positive	75%
***08 -47 330	Megha Mukherjee	INT-Pitched Relax	3 positive	58%
***43 -48 330	Shuvankar Saha	INT-Pitched Relax	3 positive	67%
***88 -44 330	VishaKumarSingh ...	INT-Pitched Relax	0 positive	58%

- 17 Neutral Moments
  - Pitched Tenant Relax Plan
  - Capturing Tenant Move in Type
  - Location
  - Relocation
  - Tenant Move in Date
  - Move in date
  - Tenant Budget
  - RM Intro
  - Capturing BHK Requirement
  - FRM benefits
  - FRM Intro
  - Plan Amount Explanation
  - Plans amount owner
  - Number of Available Properties
  - Premium Filters
  - Plan Amount
  - Instant property alerts

This screenshot shows a tooltip over the '1 positive' chip of a call, listing the following moment:

- 1 Positive Moments
  - Sabotage

This screenshot shows a tooltip over the '1 negative' chip of a call, listing the following moment:

- 1 Negative Moments
  - Over Promising

# Calls Page: Checklist Selection



To select the checklist, use checklist selector accessible by clicking the icon on right of Checklist header

The screenshot displays the Calzen Calls page interface. At the top, there is a navigation bar with the Calzen logo and various menu items: Dashboard, Calls, Chats, Agents, Moments, Smart Clusters, Checklist, Automation, Coaching, and Settings. The main content area is titled 'Calls' and includes a dropdown menu for 'Tenant Sales Agents'. Below this, there are filters for 'Call Duration: > 30 secs', 'View By: Today', 'Transcribed Calls', and 'Check List: Tenant Relax Pl...'. A table lists call records with columns for Phone, Agent Name, Dispose Name, Moments (positive, negative, neutral), Call Score, Checklist, and Audio. A dropdown menu is open over the 'Checklist' column, showing a search bar and a list of checklists: 'Tenant Assure Plan Checklist', 'Tenant Freedom Plan Checklist', 'Tenant Relax Plan Checklist', and 'Select All'. Each item has a checkbox, with the 'Select All' option checked. The table also shows call scores and percentages for each record, such as 92% for the first call and 82% for the second.

Phone	Agent Name	Dispose Name	# Moments	Call Score	Checklist	Audio
***85 -07 204	SkSayefAli NBTS2...	INT-Pitched Relax	1 positive, 1 negative, 17 neutral	92	82% Tenant Relax	4:54 min
***17 -07 204	ShakMohammadr...	INT-Pitched Mone...	3 positive, 1 negative, 25 neutral	98	100% Tenant Rel	8:37 min
***97 -08 204	JatinKumar NBTS2...	INT-Pitched Mone...	0 positive, 0 negative, 17 neutral	71	75% Tenant Rel	8:48 min
***08 -05 204	Megha Mukherjee	INT-Pitched Relax	3 positive, 1 negative, 13 neutral	42	88% Tenant Rel	10:48 min
***43 -04 204	Shuvankar Saha	INT-Pitched Relax	1 positive, 1 negative, 13 neutral	82	67% Tenant Relax Plan Checklist, 84% Tenant Freedom Plan Checklist	6:14 min
***89 -04 204	VishalKumarSingh ...	INT-Pitched Relax	0 positive, 0 negative, 12 neutral	58	88% Tenant Relax Plan Checklist	4:38 min



# Calls Page: Checklist Details

To view the checklist details at glance, click the checklist to see all *eligible* moments, their tagging status, weightage and overall score

The screenshot displays the Callzenn interface for the 'Calls' page. The top navigation bar includes 'Dashboard', 'Calls', 'Chats', 'Agents', 'Moments', 'Smart Clusters', 'Checklist', 'Automation', 'Coaching', and 'Settings'. The main content area shows a table of call records with columns for Phone, Agent Name, Dispose Name, Moments, Call Score, Checklist, and Audio. A popup window is open over the 'Checklist' column of the first row, showing details for the '11/12 Tenant Relax Plan Checklist' with a score of 92%. The popup lists 12 moments in the checklist with their respective weightages.

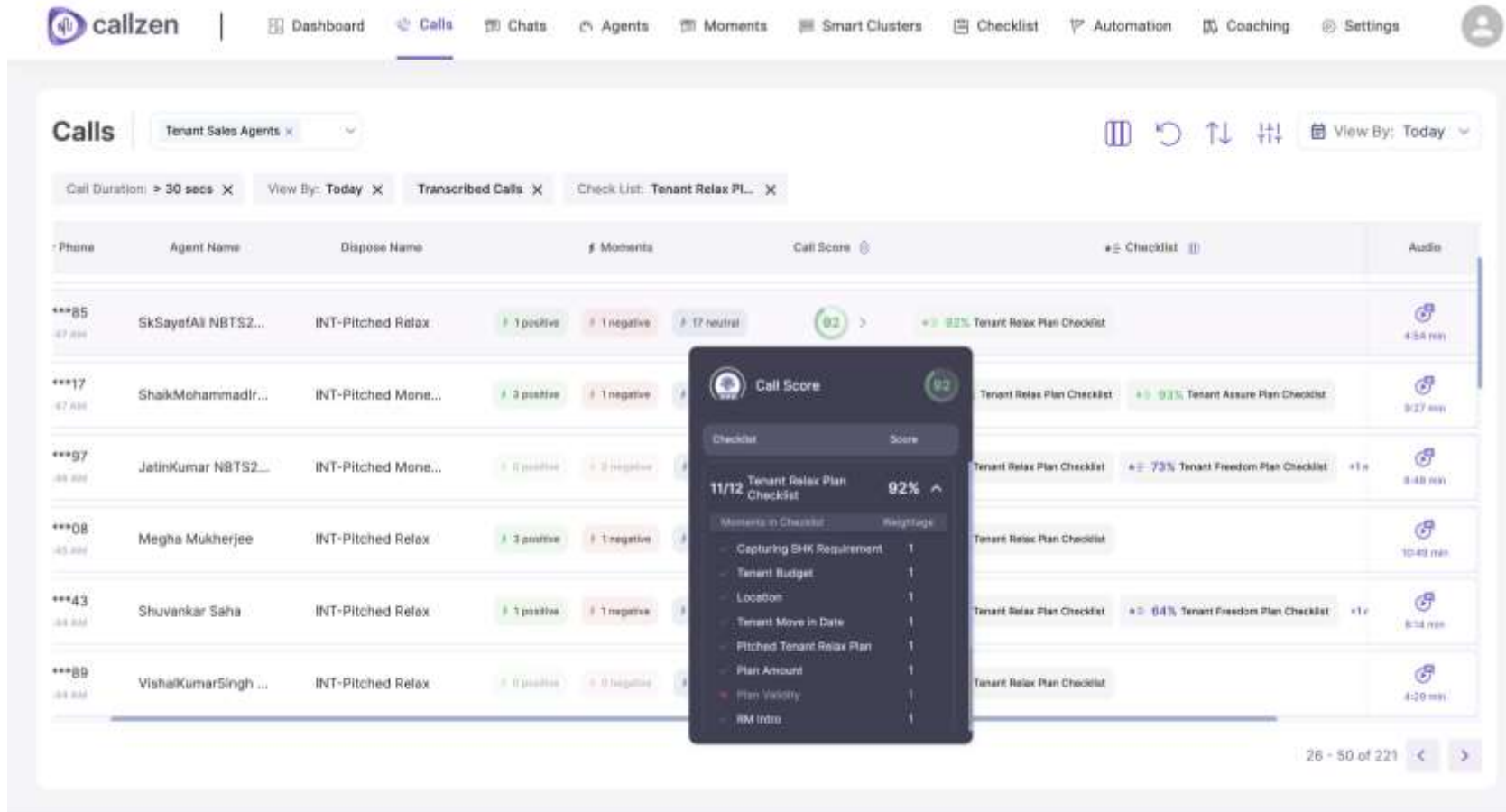
Phone	Agent Name	Dispose Name	Moments	Call Score	Checklist	Audio
***85 07 AM	SkSayefAli NBTS2...	INT-Pitched Relax	1 positive, 1 negative, 17 neutral	82	92% Tenant Relax Plan Checklist	4:54 min
***17 07 AM	ShaikMohammadir...	INT-Pitched Mona...	3 positive, 1 negative, 25 neutral	86	83% Tenant Assure Plan Checklist	0:21 min
***97 08 AM	Jatinkumar NBTS2...	INT-Pitched Mona...	0 positive, 3 negative, 17 neutral	71	3% Tenant Freedom Plan Checklist	0:48 min
***08 08 AM	Megha Mukherjee	INT-Pitched Relax	3 positive, 1 negative, 15 neutral	42	Tenant Move in Date	10:48 min
***43 08 AM	Shuvankar Saha	INT-Pitched Relax	1 positive, 1 negative, 11 neutral	62	Pitched Tenant Relax Plan	8:14 min
***89 08 AM	VishalKumarSingh ...	INT-Pitched Relax	0 positive, 3 negative, 12 neutral	58	4% Tenant Freedom Plan Checklist	4:20 min

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\*The weightage of moments is used to calculate the checklist Score which is used later to calculate the Call Score

# Calls Page: Call Score and details

To view the Call Score details, click the call score to see all eligible checklists and their details



The screenshot displays the Calzen interface for the 'Calls' page. The top navigation bar includes 'Dashboard', 'Calls', 'Chats', 'Agents', 'Moments', 'Smart Clusters', 'Checklist', 'Automation', 'Coaching', and 'Settings'. The main content area shows a list of calls with columns for Phone, Agent Name, Disposal Name, Moments, Call Score, Checklist, and Audio. A call score popup is open over the 'Call Score' column of the first call, showing a score of 92% and a list of checklists with their respective weights.


Phone	Agent Name	Disposal Name	Moments	Call Score	Checklist	Audio
***85 07 000	SkSayefAli NBTS2...	INT-Pitched Relax	1 positive, 1 negative, 17 neutral	92	+92% Tenant Relax Plan Checklist	4:54 min
***17 07 000	ShaikMohammadr...	INT-Pitched More...	3 positive, 1 negative		Tenant Relax Plan Checklist +93% Tenant Assure Plan Checklist	9:27 min
***97 04 000	JatinKumar NBTS2...	INT-Pitched More...	0 positive, 3 negative		Tenant Relax Plan Checklist +73% Tenant Freedom Plan Checklist	8:48 min
***08 04 000	Megha Mukherjee	INT-Pitched Relax	3 positive, 1 negative		Tenant Relax Plan Checklist	10:49 min
***43 04 000	Shuvankar Saha	INT-Pitched Relax	1 positive, 1 negative		Tenant Relax Plan Checklist +64% Tenant Freedom Plan Checklist	8:14 min
***89 04 000	VishalKumarSingh ...	INT-Pitched Relax	0 positive, 0 negative		Tenant Relax Plan Checklist	4:20 min

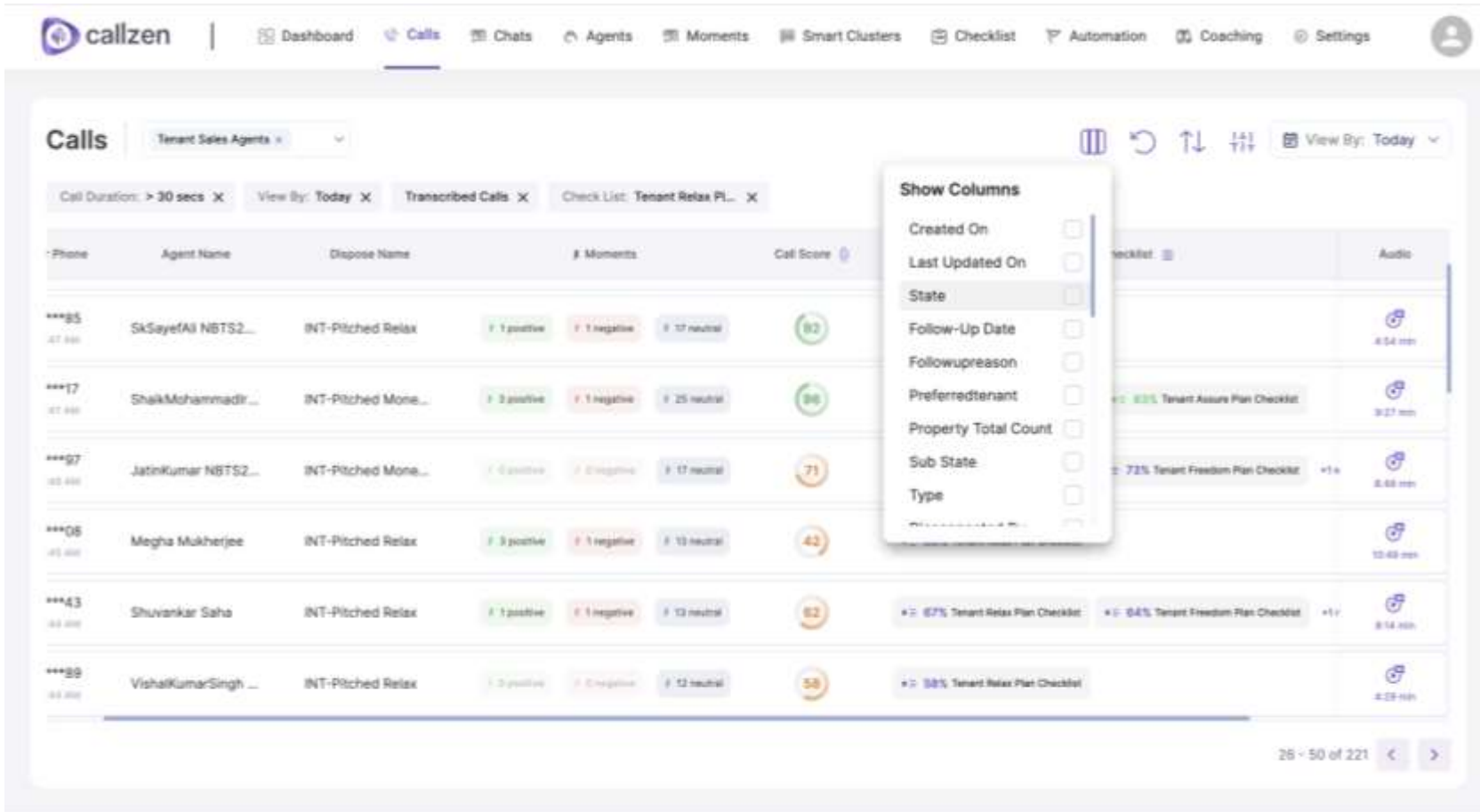
Call Score popup details:

- Score: 92%
- Checklist: 11/12 Tenant Relax Plan Checklist
- Moments in Checklist:
- Capturing SHK Requirement: 1
- Tenant Budget: 1
- Location: 1
- Tenant Move in Date: 1
- Pitched Tenant Relax Plan: 1
- Plan Amount: 1
- Plan Validity: 1
- RM Intro: 1

\*If multiple checklists are eligible, the call score is calculated by taking equal weighted mean of the checklist score

# Calls Page: Column Selection

 To add/remove columns from the view, you can use Column Selector on top right




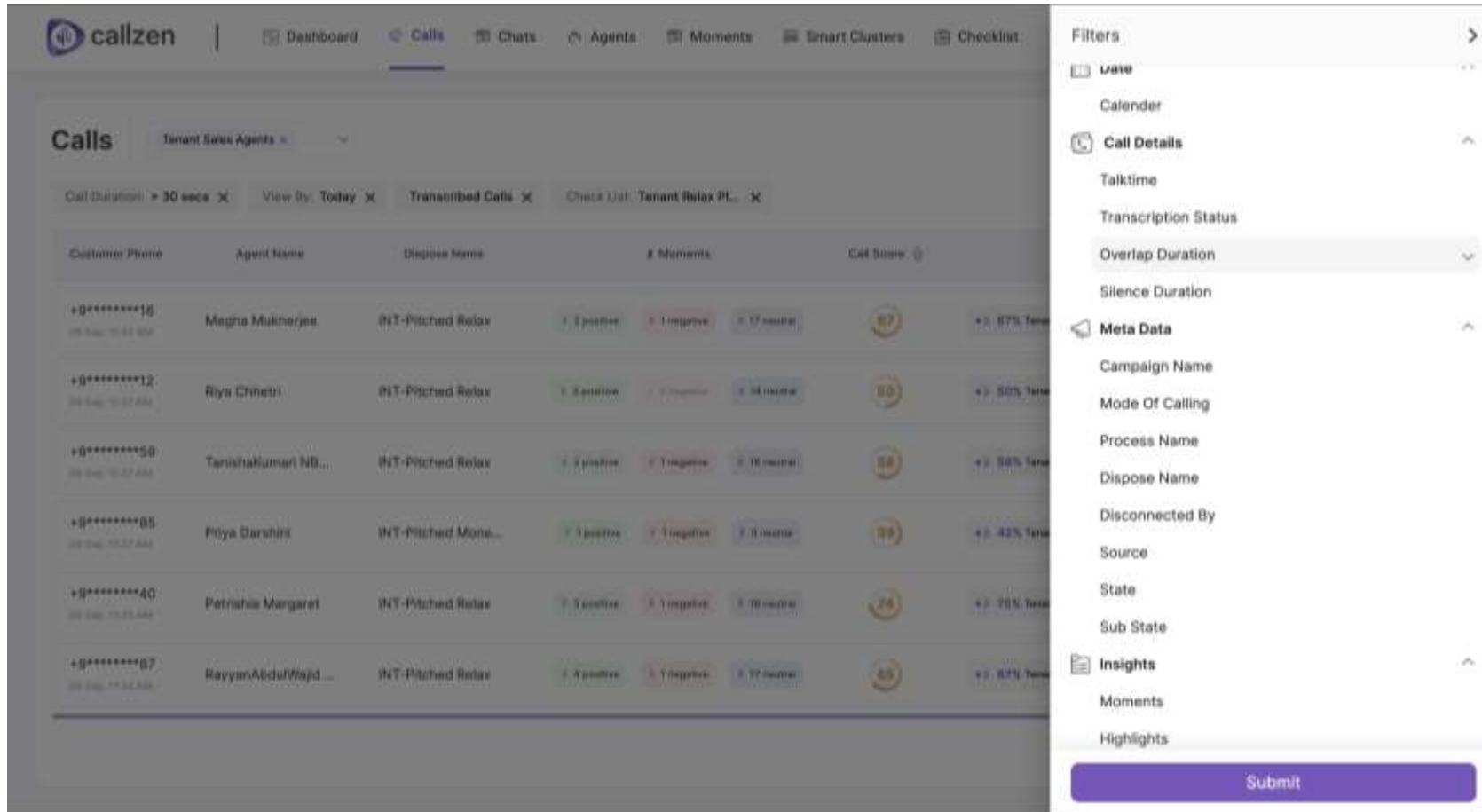
The screenshot displays the Calzen interface for the 'Calls' page. The top navigation bar includes 'Dashboard', 'Calls', 'Chats', 'Agents', 'Moments', 'Smart Clusters', 'Checklist', 'Automation', 'Coaching', and 'Settings'. The main content area shows a list of calls with columns for Phone, Agent Name, Disposal Name, # Moments, and Call Score. A 'Show Columns' menu is open, listing various columns with checkboxes: Created On, Last Updated On, State, Follow-Up Date, Followupreason, Preferredtenant, Property Total Count, Sub State, and Type. The table below the menu shows call details for agents like Sakayefai NBTS2, ShaikMohammadir, Jatinkumar NBTS2, Megha Mukherjee, Shuvankar Saha, and VishalKumarSingh, including their disposal names, sentiment counts, and call scores.

Phone	Agent Name	Disposal Name	# Moments	Call Score
***85 07:40	Sakayefai NBTS2...	INT-Pitched Relax	1 positive, 1 negative, 17 neutral	82
***17 07:40	ShaikMohammadir...	INT-Pitched Mone...	3 positive, 1 negative, 25 neutral	86
***97 03:40	Jatinkumar NBTS2...	INT-Pitched Mone...	0 positive, 0 negative, 17 neutral	71
***08 03:40	Megha Mukherjee	INT-Pitched Relax	3 positive, 1 negative, 13 neutral	43
***43 03:40	Shuvankar Saha	INT-Pitched Relax	1 positive, 1 negative, 12 neutral	82
***89 03:40	VishalKumarSingh ...	INT-Pitched Relax	3 positive, 0 negative, 12 neutral	58

\*The options show in column selector can be changed by changing configuration only accessible to admins

# Calls Page: Filters

 Additional Filters can be accessed by clicking on the icon



The screenshot displays the Calzen interface for the 'Calls' page. The main area shows a list of calls with columns for Customer Phone, Agent Name, Dispose Name, # Moments, and Call Score. The filters sidebar on the right is open, showing various filter categories and options.

Customer Phone	Agent Name	Dispose Name	# Moments	Call Score
+91*****16	Magna Mukherjee	INT-Pitched Relax	1 positive, 1 negative, 17 neutral	87
+91*****12	Riya Chhetri	INT-Pitched Relax	1 positive, 1 negative, 14 neutral	80
+91*****59	Tarishakumari NB...	INT-Pitched Relax	1 positive, 1 negative, 16 neutral	58
+91*****85	Priya Darshini	INT-Pitched Mone...	1 positive, 1 negative, 8 neutral	79
+91*****40	Patrisia Margaret	INT-Pitched Relax	1 positive, 1 negative, 16 neutral	74
+91*****87	RayyanAbduWajid ...	INT-Pitched Relax	1 positive, 1 negative, 17 neutral	63

**Filters**

- Wave
- Calendar
- Call Details
  - Talktime
  - Transcription Status
  - Overlap Duration
  - Silence Duration
- Meta Data
  - Campaign Name
  - Mode Of Calling
  - Process Name
  - Dispose Name
  - Disconnected By
  - Source
  - State
  - Sub State
- Insights
  - Moments
  - Highlights

Submit

# Calls Page: Filters

Additionally, filterable values can also be directly filtered by clicking on the value in cell, then clicking on “filter by this Value”

The screenshot displays the Calzen interface for the 'Calls' page. The top navigation bar includes 'Dashboard', 'Calls', 'Chats', 'Agents', 'Moments', 'Smart Clusters', 'Checklist', 'Automation', 'Coaching', and 'Settings'. The main content area shows a table of call records with various filters and a 'Filter by this value' tooltip.

**Filters:** Call Duration: > 30 secs, View By: Today, Transcribed Calls, Check List: Tenant Relax Pl...

Customer Phone	Agent Name	Dispose Name	# Moments	Call Score	Checklist	Audio
+9*****16 05 Sep, 11:43 AM	Megha Mukherjee	INT-Pitched Relax	2 positive, 1 negative, 17 neutral	67	67% Tenant Relax Plan Checklist	6:11 min
+9*****12 05 Sep, 11:27 AM	Riya Chhetri	INT-Pitched Relax	3 positive, 0 negative, 14 neutral	50	50% Tenant Relax Plan Checklist	10:55 min
+9*****59 05 Sep, 11:27 AM	TarishaKumari NB...	INT-Pitched Relax	2 positive, 1 negative, 16 neutral	58	58% Tenant Relax Plan Checklist	3:29 min
+9*****85 05 Sep, 11:27 AM	Priya Darshini	INT-Pitched Mone...	1 positive, 1 negative, 9 neutral	39	42% Tenant Relax Plan Checklist, 38% Tenant Assure Plan Che	7:30 min
+9*****40 05 Sep, 11:29 AM	Petrishia Margaret	INT-Pitched Relax	3 positive, 1 negative, 16 neutral	74	75% Tenant Relax Plan Checklist, 73% Tenant Freedom Plan Ch	7:55 min
+9*****87 05 Sep, 11:24 AM	RayyanAbdulWajid ...	INT-Pitched Relax	4 positive, 1 negative, 17 neutral	85	67% Tenant Relax Plan Checklist, 64% Tenant Assure Plan Che	15:34 min

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# Audio Detail Page



On clicking the play button on the calls page, user can view the Audio page

The audio player can be used to play the audio

The calls details can be viewed under the session info

The screenshot displays the Callzen interface for a call with ID ShaikMohammadIrfan NBTS29040. The call duration is 6 minutes and 45 seconds. The transcript is divided into segments with tags like 'Salutation', 'Tenant Bud...', 'Capturing Location', and 'Capturing ...'. A search transcript panel on the right allows for finding specific phrases in the transcript.

Session info				
Customer Phone	Customer Id	Agent Name	Date Of Call	Checklist
+9*****16	Ba9fbf827f3e8035017f3...	ShaikMohammadIrfan N..	Sep 05,2023 10:28 AM	12/12 Tenant Relax Plan
Cdr Id	Moments	Highlights	Call Disposition	Campaign Name
ba778644-f016-4331-af3...	24 Found		INT-Pitched ...	RMSales
Mode Of Calling	Process Name	Agent Talktime	Customer Talktime	
Auto	TenantAuto	4 mins 20 secs	58 secs	

24 marked in Moments

The transcription of the call can be seen on the left panel.

The moments tagged can be viewed against each chunk

The individual transcript phrase can also be used to navigate the call audio.

# Audio Detail Page: Summary

The summary of the call can be viewed on the bottom of the audio page.

The screenshot displays the Callzen interface for an audio call. At the top, there is a navigation bar with the Callzen logo and various menu items: Dashboard, Calls, Chats, Agents, Moments, Smart Clusters, Checklist, Automation, Coaching, and Settings. Below the navigation bar, there are five tabs for different call segments: Salutation (From 00:00:08), Deposit (From 00:00:17), Location (From 00:00:50), Capturing Tenant Move... (From 00:01:09), and Tent (From 00:01:27). The main content area is divided into two columns. The left column contains a 'Summary' section with the following details:

- Topic:** Rental property search in Hyderabad
- Discussion Points:**
  - The customer is looking for a 2BHK rental property in Hyderabad, Hyderabad with a budget of Rs. 15,000 to Rs. 13,000.
  - The agent suggests No Broker website, which does not charge any commission or brokerage, and the customer can search for properties based on their requirements without any hidden charges.
  - The agent suggests a plan to the customer based on her requirements.
  - The Tenant Relax Plan, which assigns a telephonic relationship manager to the customer to help her find properties on the No Broker app and register her preferences.
  - If the customer finds a suitable property, the relationship manager will inform the customer and arrange a meeting with the property owner at a convenient time.
  - The plan costs Rs. 2,999 + 18% GST, and the validity of the plan is for 45 days.
  - The customer will get 50 owner details contacts and a premium filter option if she does not find a property through this plan.
  - The Relax Plan is another plan called the Relax Plan that costs ₹5,499+18% GST and offers 50 owner contact details. This plan does not include the option of negotiation of rent or deposit with the owner, but offers the same property details and a refundable deposit.
- Customer Queries:**
  - None mentioned.
- Action Items:**
  - None mentioned.

The right column contains a 'Search Transcript' section with a search bar and a list of transcript entries. Each entry includes a timestamp and a play button icon. The transcript entries are:

- 00:00:00: Hello.
- 00:00:01: Hello, good morning, mam. This is Rulian calling from NoBroker website.
- 00:00:06: Ha ha, kya boire?
- 00:00:08: Mam, NoBroker website se call kar raha hai, mam.
- 00:00:10: Ha, bolie.
- 00:00:12: Ji, mam, aapne rent ke liye aaroch kar rahe na, mam. Property?
- 00:00:15: Ha, search karre.
- 00:00:17: Ji, mam. Mein jaan sakta hun aapka requirement aapka rent budget kitna hai, mam?
- 00:00:22: Ah, 15 to 15000, below 15000.
- 00:00:27: Below 15 thousand.

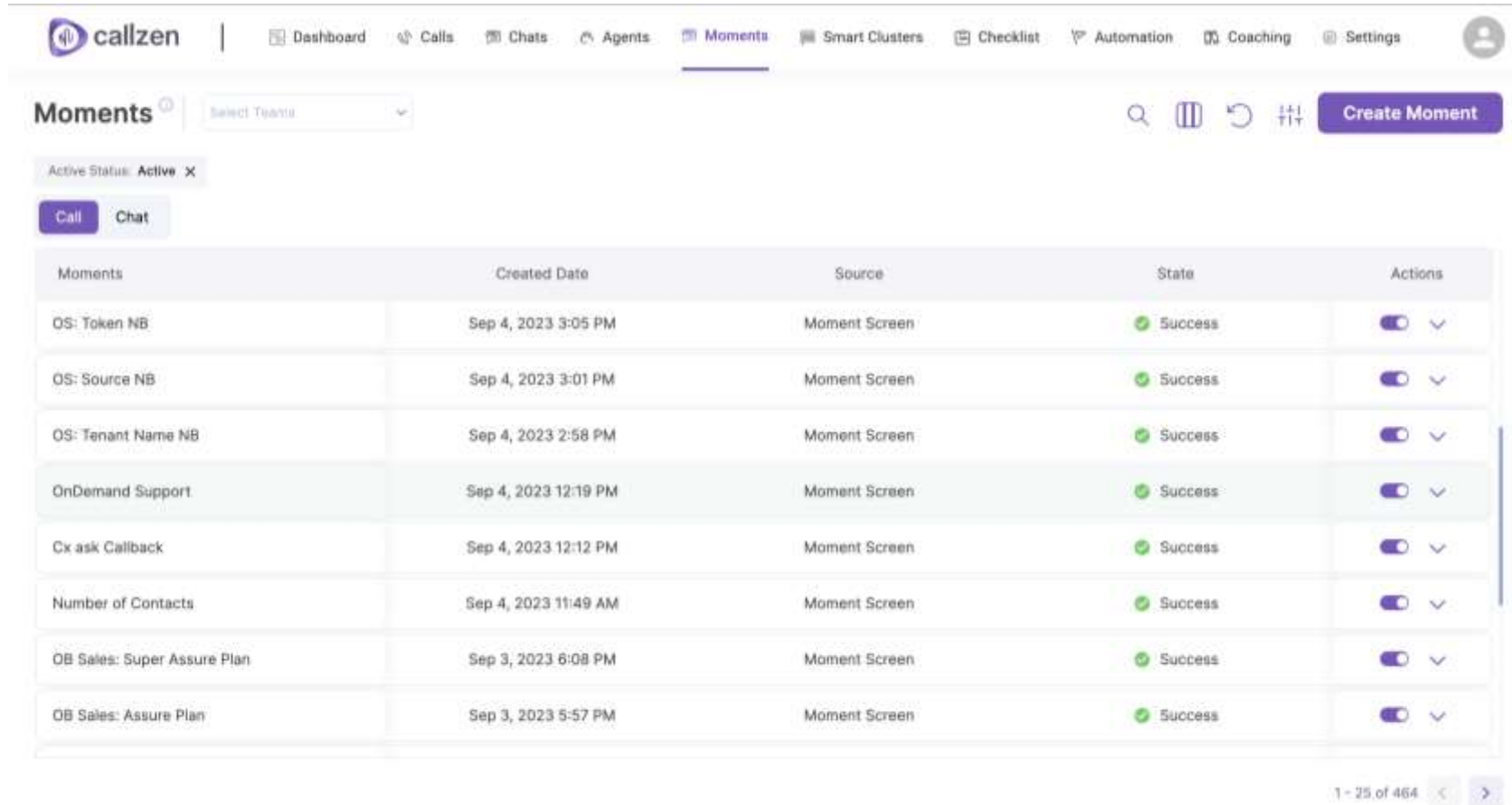
# What are Moments ?

- A moment is a intent of a user of conversation.
- It is be used to capture the smallest unit of intent
- Example: good morning, mention of an entity like company name, voice breakup, asking for refund, gratitude etc.
- Although, multiple intents can be added to a single moment during configuration, one moment must be used to capture one intent only.
- Wrong configuration may affect the tagging behavior, leading to false positives or negatives.



# Moments Page

All the moments can be viewed under moments tab.



The screenshot shows the Callzen Moments page. The navigation bar includes Dashboard, Calls, Chats, Agents, Moments (selected), Smart Clusters, Checklist, Automation, Coaching, and Settings. The Moments page has a search bar, a 'Select Teams' dropdown, and a 'Create Moment' button. Below the navigation is a filter for 'Active Status: Active' and tabs for 'Call' and 'Chat'. The main content is a table with the following data:

Moments	Created Date	Source	State	Actions
OS: Token NB	Sep 4, 2023 3:05 PM	Moment Screen	Success	<input checked="" type="checkbox"/>
OS: Source NB	Sep 4, 2023 3:01 PM	Moment Screen	Success	<input checked="" type="checkbox"/>
OS: Tenant Name NB	Sep 4, 2023 2:58 PM	Moment Screen	Success	<input checked="" type="checkbox"/>
OnDemand Support	Sep 4, 2023 12:19 PM	Moment Screen	Success	<input checked="" type="checkbox"/>
Cx ask Callback	Sep 4, 2023 12:12 PM	Moment Screen	Success	<input checked="" type="checkbox"/>
Number of Contacts	Sep 4, 2023 11:49 AM	Moment Screen	Success	<input checked="" type="checkbox"/>
OB Sales: Super Assure Plan	Sep 3, 2023 6:08 PM	Moment Screen	Success	<input checked="" type="checkbox"/>
OB Sales: Assure Plan	Sep 3, 2023 5:57 PM	Moment Screen	Success	<input checked="" type="checkbox"/>

At the bottom right of the table, there is a pagination indicator: '1 - 25 of 464' with left and right arrow buttons.

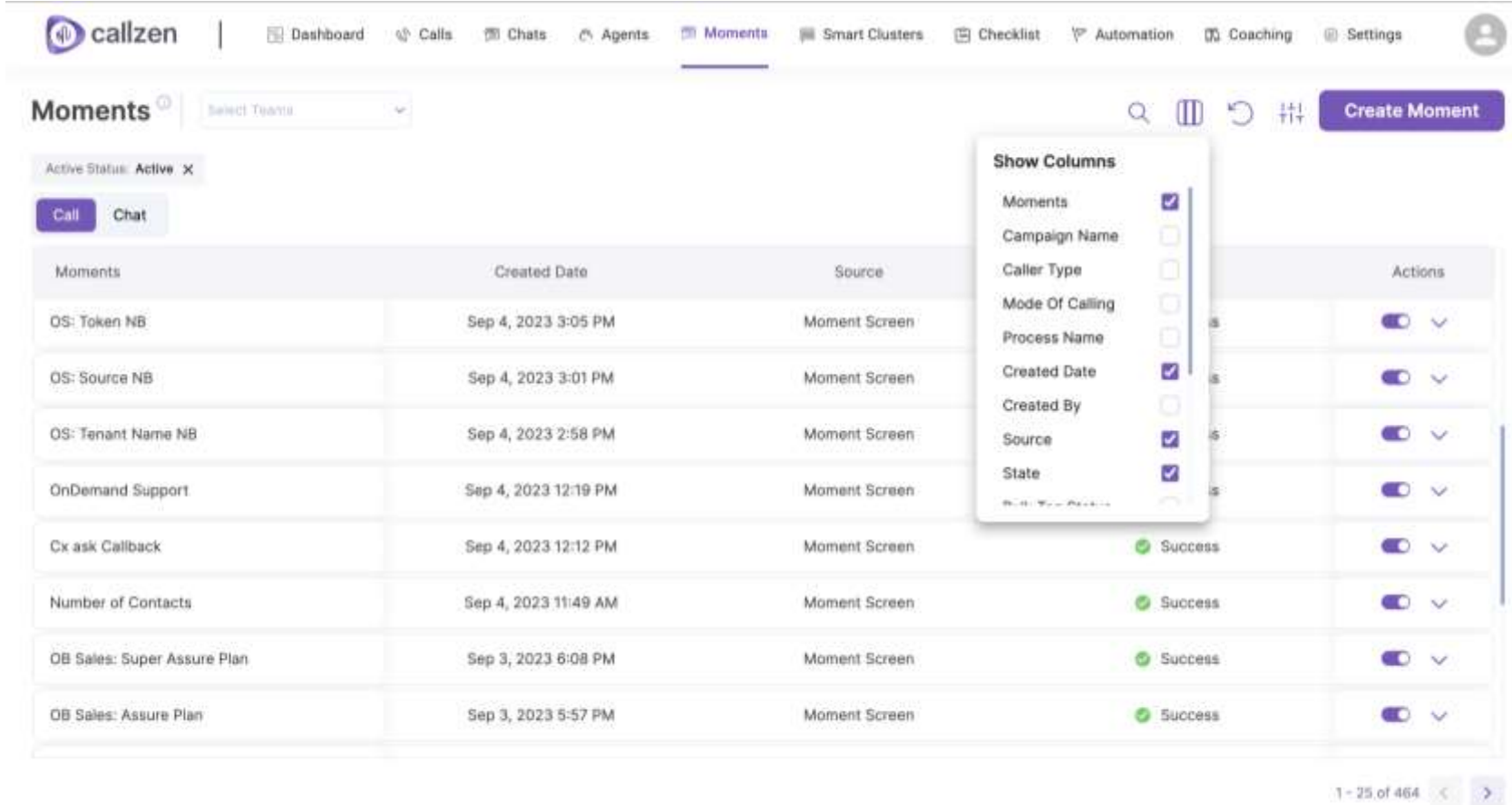
These can be activated/deactivated by from the moments page by clicking on the button under 'Actions' column.

The moment details can be viewed/ edited by clicking on the down button under Actions section

\*If a team is selected, only moments eligible for that team will appear

# Moments Page: Column Selection

 Columns can be added or removed by using the column selector accessed by clicking the icon on the right




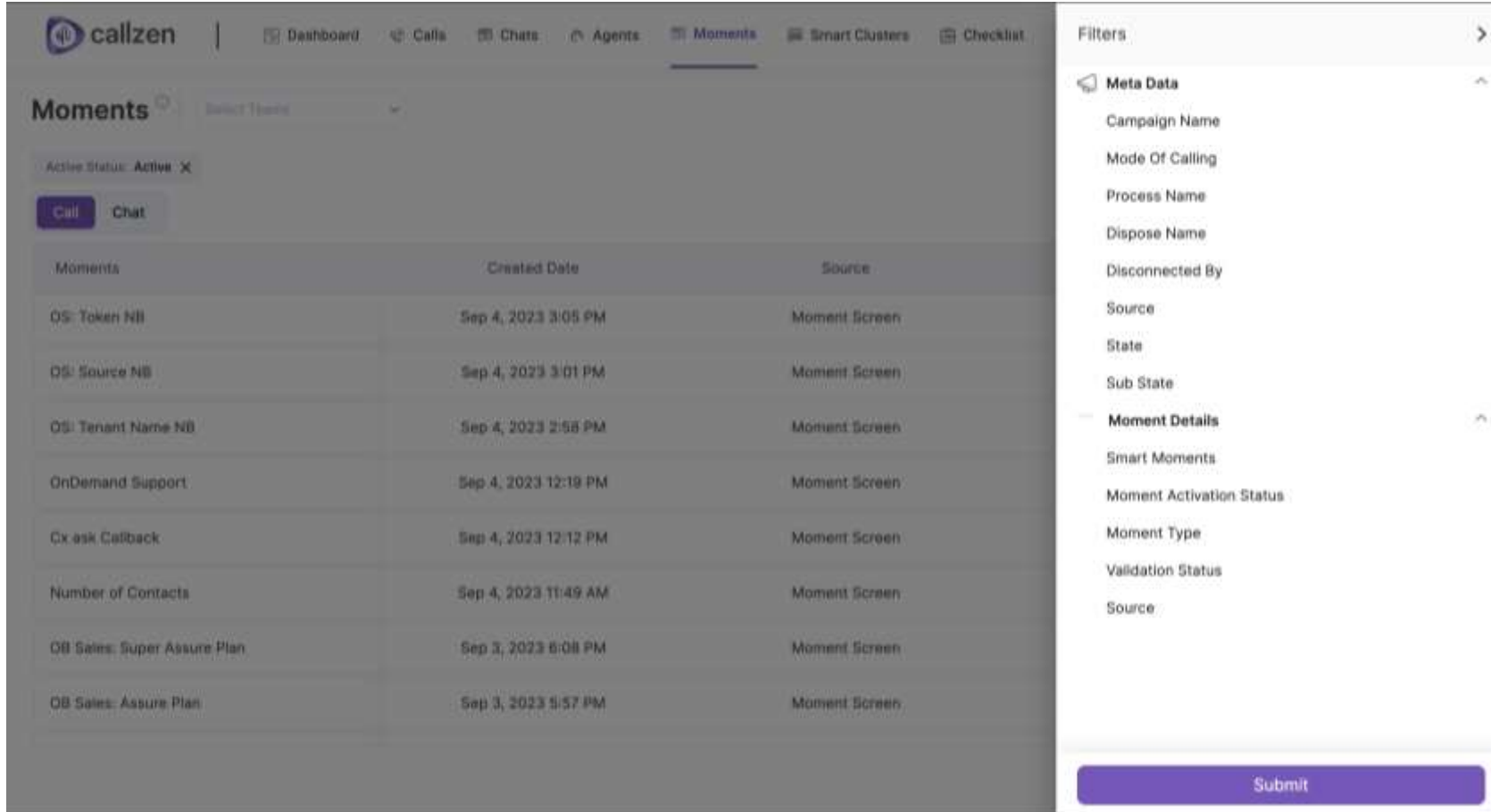
The screenshot displays the Callzen Moments page. The navigation bar includes Dashboard, Calls, Chats, Agents, Moments (active), Smart Clusters, Checklist, Automation, Coaching, and Settings. The Moments page header shows 'Moments' with a 'Select Teams' dropdown, a search icon, a refresh icon, a column selector icon, and a 'Create Moment' button. Below the header, there are filters for 'Active Status: Active' and tabs for 'Call' and 'Chat'. The main content is a table with columns: Moments, Created Date, Source, and Actions. A 'Show Columns' dropdown menu is open, listing various columns with checkboxes to toggle their visibility. The table contains 9 rows of data, each with a 'Success' status and a toggle in the Actions column.

Moments	Created Date	Source	Actions
OS: Token NB	Sep 4, 2023 3:05 PM	Moment Screen	Success
OS: Source NB	Sep 4, 2023 3:01 PM	Moment Screen	Success
OS: Tenant Name NB	Sep 4, 2023 2:58 PM	Moment Screen	Success
OnDemand Support	Sep 4, 2023 12:19 PM	Moment Screen	Success
Cx ask Callback	Sep 4, 2023 12:12 PM	Moment Screen	Success
Number of Contacts	Sep 4, 2023 11:49 AM	Moment Screen	Success
OB Sales: Super Assure Plan	Sep 3, 2023 6:08 PM	Moment Screen	Success
OB Sales: Assure Plan	Sep 3, 2023 5:57 PM	Moment Screen	Success

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# Moments Page: Filter

 The various table filters can be accessed by clicking on the filter icon on the top right.



The screenshot displays the Calzen Moments page. The main content area shows a table of moments with columns for Moments, Created Date, and Source. The filters sidebar on the right is open, showing two sections: Meta Data and Moment Details. A Submit button is visible at the bottom of the filters sidebar.

Moments	Created Date	Source
OS: Token NB	Sep 4, 2023 3:05 PM	Moment Screen
OS: Source NB	Sep 4, 2023 3:01 PM	Moment Screen
OS: Tenant Name NB	Sep 4, 2023 2:58 PM	Moment Screen
OnDemand Support	Sep 4, 2023 12:19 PM	Moment Screen
Cx ask Callback	Sep 4, 2023 12:12 PM	Moment Screen
Number of Contacts	Sep 4, 2023 11:49 AM	Moment Screen
OB Sales: Super Assure Plan	Sep 3, 2023 6:08 PM	Moment Screen
OB Sales: Assure Plan	Sep 3, 2023 5:57 PM	Moment Screen

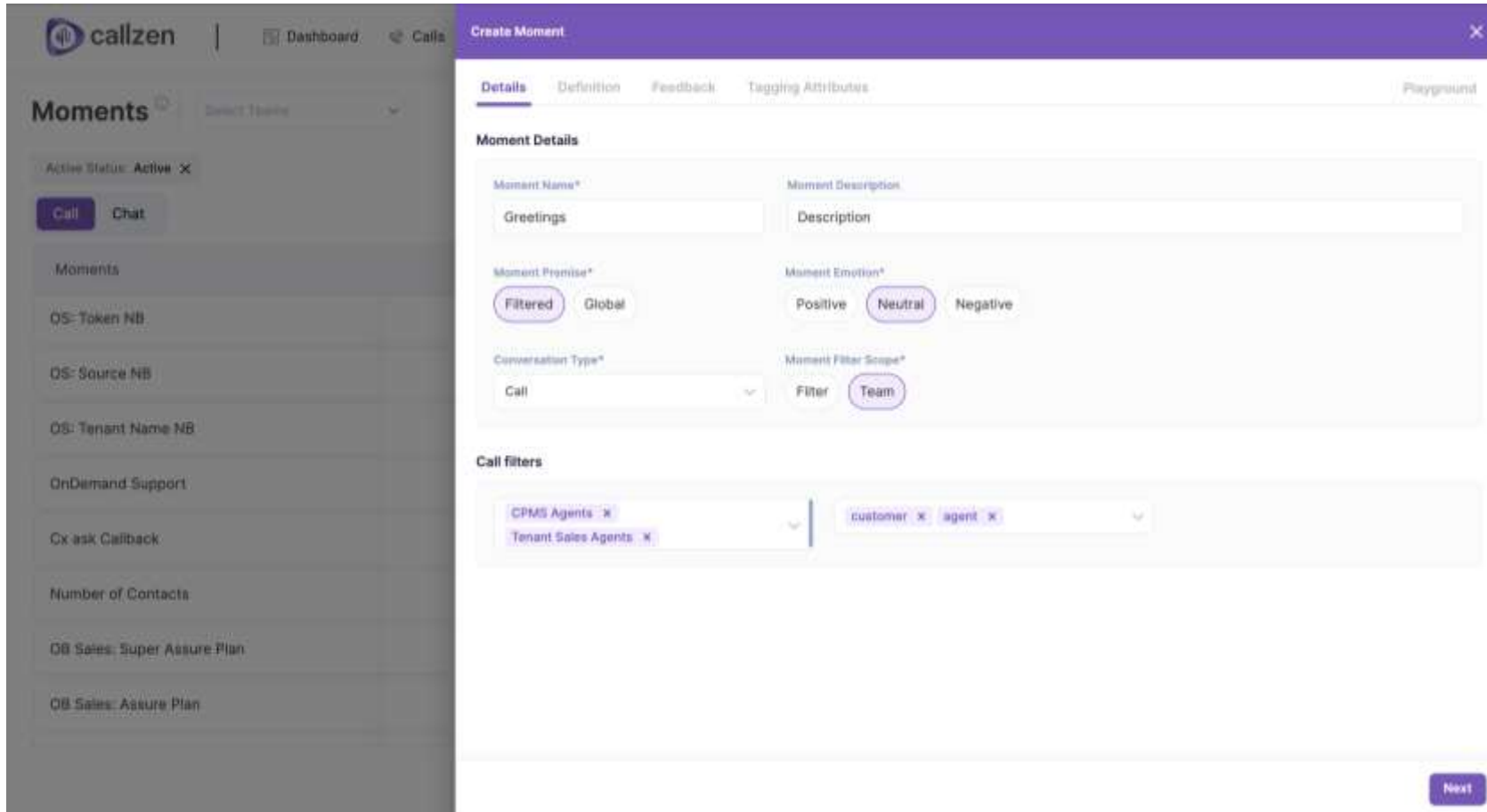
**Filters**

- Meta Data**
  - Campaign Name
  - Mode Of Calling
  - Process Name
  - Dispose Name
  - Disconnected By
  - Source
  - State
  - Sub State
- Moment Details**
  - Smart Moments
  - Moment Activation Status
  - Moment Type
  - Validation Status
  - Source

**Submit**

# Moments Creation: Details

On Clicking  button on Moments page, the moment creation flow starts



The screenshot shows the 'Create Moment' form in the Calzen interface. The form is titled 'Create Moment' and has tabs for 'Details', 'Definition', 'Feedback', 'Tagging Attributes', and 'Playground'. The 'Details' tab is active. The form contains several fields: 'Moment Name\*' (text input with 'Greetings'), 'Moment Description\*' (text input with 'Description'), 'Moment Promise\*' (radio buttons for 'Filtered' and 'Global', with 'Filtered' selected), 'Moment Emotion\*' (radio buttons for 'Positive', 'Neutral', and 'Negative', with 'Neutral' selected), 'Conversation Type\*' (dropdown menu with 'Call' selected), and 'Moment Filter Scope\*' (radio buttons for 'Filter' and 'Team', with 'Team' selected). Below these fields is a 'Call filters' section with two dropdown menus. The first dropdown has 'CPMS Agents' and 'Tenant Sales Agents' selected. The second dropdown has 'customer' and 'agent' selected. A 'Next' button is located at the bottom right of the form.

Fill the details of the moment in the space provided. The Call filters can change based on the configuration of the organization

\*All required fields must be filled to be able to go to next page

# Moment Creation: Keyword

Select the type of the moment using the moment type selector: Semantic, Keyword, Instructional

For Keyword Moment, three types of conditions can be used:

- Contains one of: OR condition
- Contains All: AND condition
- Does not contain: exclusion

The screenshot shows the 'Create Moment' interface in the Calzen system. The 'Moment Type' is set to 'Keyword Moment'. The 'Add Phrases' section has a dropdown menu with three options: 'Contains one of', 'Contains All', and 'Does not contain'. The 'Does not contain' option is currently selected. Below the dropdown is a text input field labeled 'Enter Keyword'. To the right of the input field is a 'View Sample Phrases' button. Below the input field is a 'Guidelines' section with the following bullet points:

- The keyword is exactly matched against the whole input phrase.
- Contains All / Must contain all the inputs ( AND condition).
- Contains one of / Must contain one or all of the inputs ( OR condition).
- Does not contain: Must NOT contain any of the inputs. Note: This condition can only be used when one of the 'Contains' condition is used.

At the bottom right of the interface, there are 'Save as Draft' and 'Next' buttons.

After entering all the information, user can check the sample phrases against which this moment will be tagged by clicking “View Sample Phrases”

\*The Does not contain condition can only be used after any one of the other condition has been used

# Moment Creation: Semantic

Add the phrase in the input section in the left and you will get the similar phrases suggested by the system

calzen | Dashboard | Calls

Create Moment

Details Definition Feedback Tagging Attributes Playground

Moment Type\*

Semantic Moment Keyword Moment Instructional Moment

Add Phrases\*

Deep Search

good morning

Showing results for phrases similar to good morning .  
Show results similar to "good morning"

- good morning pritesh sir mein kunal baat kar raha hun no broker website se
- very good morning sir this is preamangul calling from no broker website
- ah sir good morning my name is sharan i am calling from no broker
- yeah good morning sir this is sadhya calling fro
- hello mam good morning this is deeraj calling from no broker website
- hello good morning mam am fras mata no broker website intha
- hello yeah hai mam good morning my name is guru calling from the no broker dot com

Find all the added phrases here once you search and add phrases

Save as Draft Next

Enter sample phrase to see the examples

Add the phrases to to create moment definition.

\* Need to add minimum of 3 sentences in the moment.

Tip: If the desired sentences always include 1/2 words, enter only those words to see all sentences which include those words, example :good morning , voice, company name etc. If sample phrase has < 3 words, the system will search for all sentences where these words are must present (unlike semantic search)

# Moment Creation: Semantic

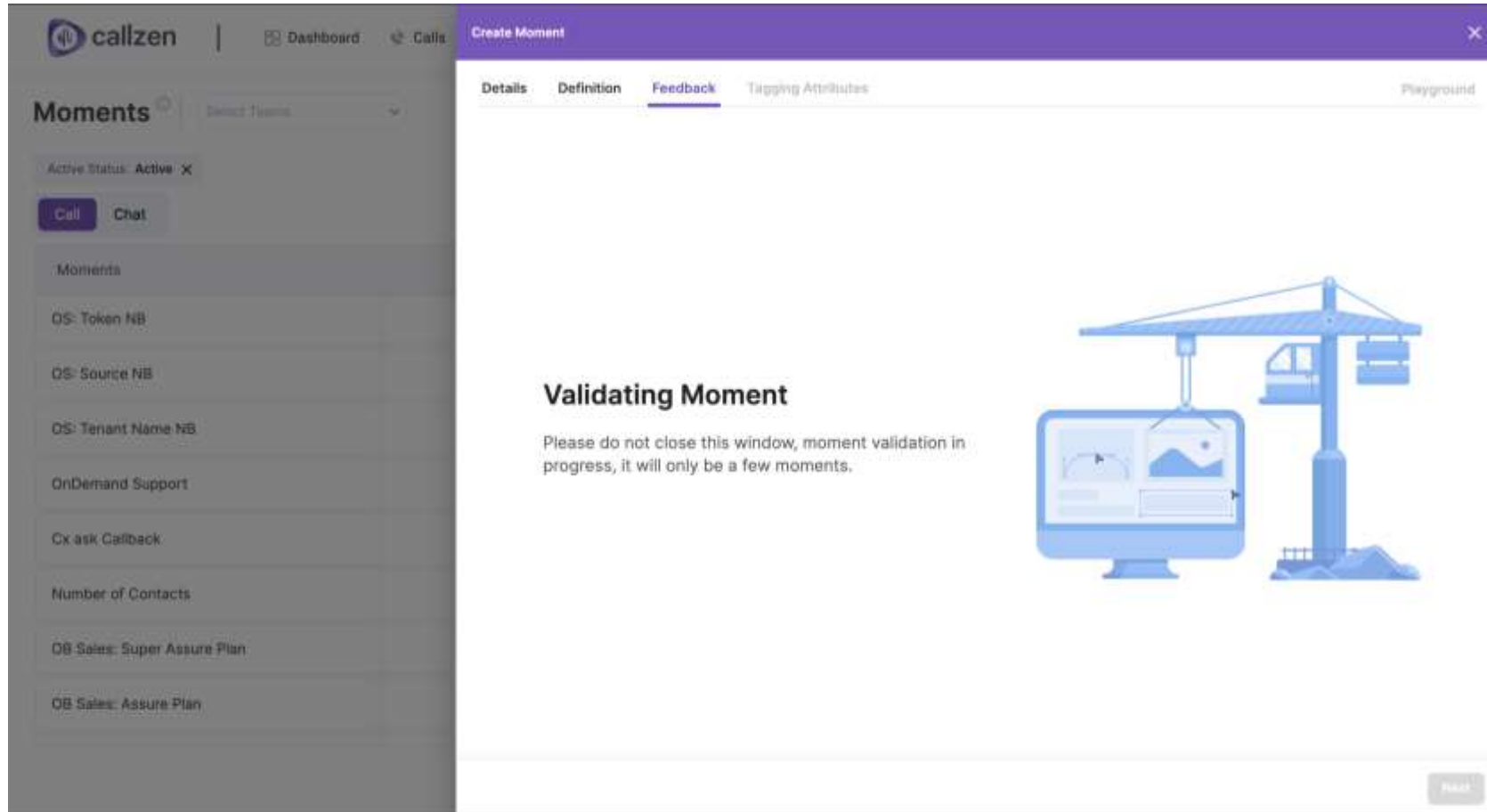
Add all the relevant phrase for semantic moment definition.

The screenshot displays the 'Create Moment' interface in the Callzen application. The 'Definition' tab is active, showing the 'Moment Type' as 'Semantic Moment'. The 'Add Phrase\*' section contains a search bar with the text 'good morning sir mai amir baat kar rha hoon nobroker se' and a list of similar phrases. The 'Add Phrases' section shows a list of phrases added for tagging, including 'ah good morning sir mera naam abale hain mein', 'good morning i have received call from your side', 'good morning sir thank you for calling no broker so you are looking for a rental property right sir', 'yeah hai hai mam very good morning this is primankur calling from no broker website', 'hah good morning madam', and 'very good morning sir this is preamangul calling from no broker website'. The 'Next' button is highlighted with a blue arrow.

Minimum of 3 phrases are required to be added. Once done adding phrases, click Next.

# Moment Creation: Validation

The moment definition will *validated* and if no errors are found, the moment will be created



The screenshot shows the 'Create Moment' interface in the Callzen application. The left sidebar contains a 'Moments' section with a 'Select Teams' dropdown and an 'Active Status: Active X' indicator. Below this are buttons for 'Call' and 'Chat', and a list of moment definitions including 'QS: Token NB', 'QS: Source NB', 'QS: Tenant Name NB', 'OnDemand Support', 'CX ask Callback', 'Number of Contacts', 'OB Sales: Super Assure Plan', and 'OB Sales: Assure Plan'. The main content area is titled 'Create Moment' and has tabs for 'Details', 'Definition', 'Feedback', 'Tagging Attributes', and 'Playground'. The 'Feedback' tab is active, displaying a 'Validating Moment' message: 'Please do not close this window, moment validation in progress, it will only be a few moments.' To the right of the text is an illustration of a computer monitor and a crane. A 'Next' button is visible at the bottom right of the main content area.

Upon successful creation, user will be asked for feedback



# Moment Creation: Validation Error

In case of any error, the corresponding cluster will be *highlighted* and the user must to take action to resolve the error

The screenshot displays the 'Create Moment' interface in the Calzen application. The interface is divided into several sections:

- Header:** 'calzen' logo, navigation links for 'Dashboard' and 'Calls', and a 'Create Moment' title with a close button.
- Left Sidebar:** 'Moments' section with 'Active Status: Active' and buttons for 'Call' and 'Chat'. Below are various filters like 'OS- Token NB', 'OS- Source NB', 'OS- Tenant Name NB', 'OnDemand Support', 'Cx ask Callback', 'Number of Contacts', and 'OB Sales: Super Assure Plan'.
- Main Content Area:**
  - Details Tab:** 'Definition' sub-tab is active. 'Moment Type\*' is set to 'Semantic Moment'. 'Add Phrases\*' section has a search input and a 'Deep Search' toggle. Below is a list of search results for phrases similar to 'Must include\*\*', each with a plus sign for addition.
  - Add Phrases Panel:** Contains a list of phrases. One phrase, 'good morning I have received call from your side', is highlighted in red with a warning icon and the message: 'Phrase does not match with the subsequent phrases. Delete the phrase to validate moment.' Below this phrase is a 'Take Action' button.
  - Cluster 0:** A list of phrases grouped under 'Cluster 0', each with a trash icon for deletion.
- Bottom Right:** A 'Save' button.

\*A cluster is a group of similar sentences (Minimum of 3 sentences). A moment can have many cluster of sentences.

# Moment Creation: Validation Error

If there is an error, User can search for similar sentences to complete a cluster, force Add the current cluster, or delete the cluster.

The screenshot displays the 'Create Moment' interface in the Calzen application. The interface is divided into a left sidebar and a main content area. The sidebar shows a 'Moments' section with a search bar and a list of moments, including 'QS: Token NB', 'QS: Source NB', 'QS: Tenant Name NB', 'OnDemand Support', 'Cx ask Callback', 'Number of Contacts', 'OB Sales: Super Assure Plan', and 'OB Sales: Assure Plan'. The main content area is titled 'Create Moment' and has tabs for 'Details', 'Definition', 'Feedback', and 'Tagging Attributes'. The 'Definition' tab is active, showing 'Moment Type\*' with options for 'Semantic Moment', 'Keyword Moment', and 'Instructional Moment'. Below this is an 'Add Phrase\*' section with a search bar and a list of phrases. A validation error is shown in a red box: 'Phrase does not match with the subsequent phrases. Delete the phrase to validate moment.' The error message is displayed over a phrase: 'good morning i have received call from your side'. A context menu is open over this phrase, offering options: 'Suggest similar phrases', 'Add anyway', and 'Delete phrases'. The 'Add anyway' option is highlighted. The interface also includes a 'Deep Search' toggle and a 'Next' button at the bottom right.

Each cluster requires a minimum of 3 sentences

\*'Add anyway' will force add the incomplete cluster

# Moment Creation: Validation Error

To add similar sentences, click on *'Suggest similar phrases'* and add the relevant sentences that you find.

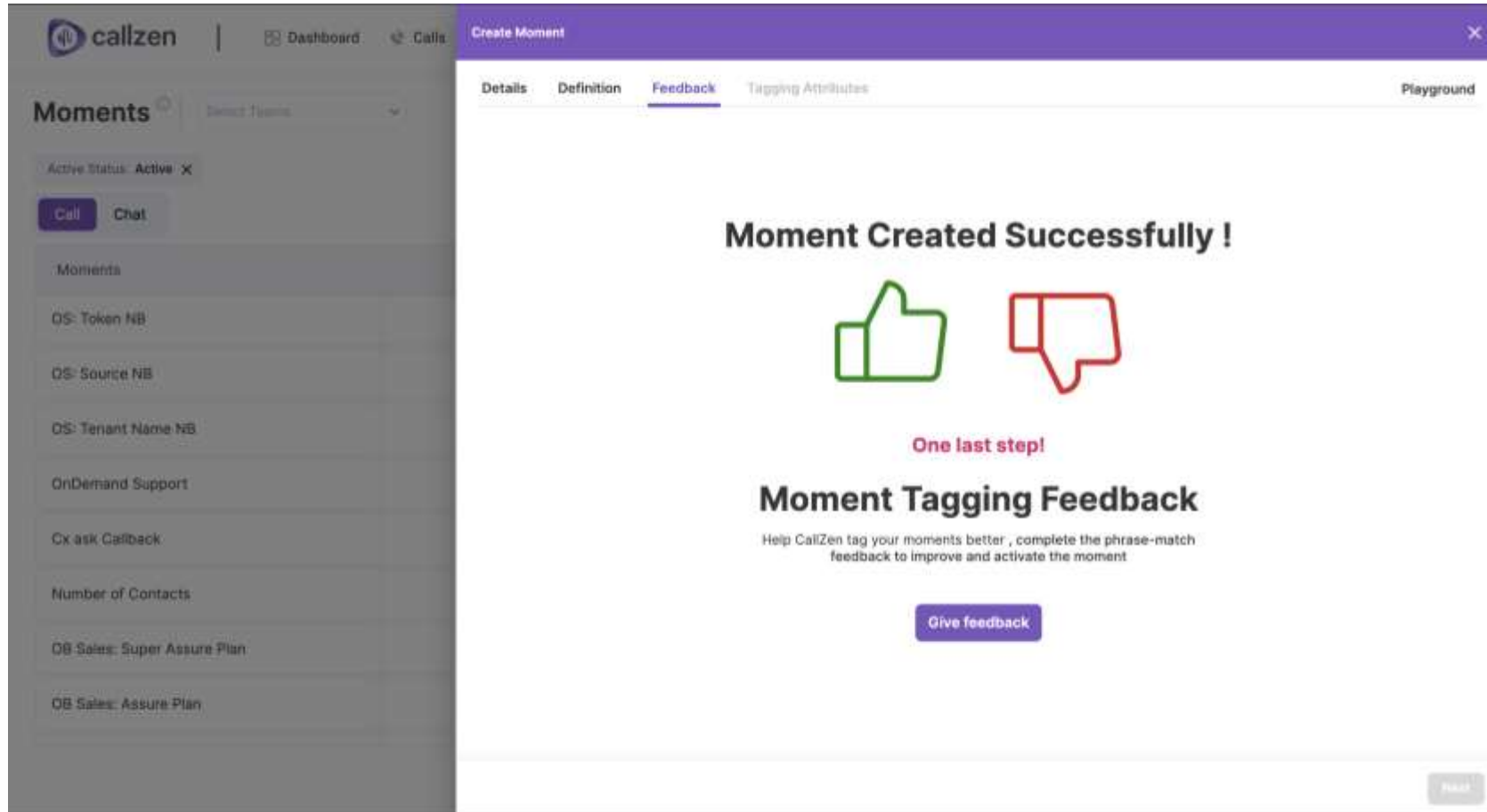
The screenshot displays the 'Create Moment' interface in the Calzen application. The interface is divided into several sections:

- Header:** 'calzen' logo, navigation links for 'Dashboard' and 'Calls', and a 'Create Moment' title with a close button.
- Left Sidebar:** 'Moments' section with 'Active Status: Active X', 'Call' and 'Chat' buttons, and a list of moments including 'OS: Token NB', 'OS: Source NB', 'OS: Tenant Name NB', 'OnDemand Support', 'Cx ask Callback', 'Number of Contacts', 'OR Sales: Super Assure Plan', and 'OB Sales: Assure Plan'.
- Main Content Area:**
  - Definition Tab:** 'Moment Type\*' with 'Semantic Moment' selected, 'Keyword Moment', and 'Instructional Moment' options.
  - Add Phrases\*:** A search box with a 'Deep Search' toggle and a 'Type sentences while doing a semantic search' placeholder.
  - Search Results:** A list of phrases similar to the current moment, such as 'ji namaste sir mein raj baat kar raha hu no broker se', 'ha namaste mam mein raj baat karahahu no broker se', and 'good morning sir i am spoorti from no broker i am speaking'.
  - Add Phrases Section:** A list of phrases to be added, including 'ah good morning madam', 'yeah good morning madam', and 'good morning i have received call from your side'.
  - Validation Error:** A red alert box is displayed over the 'Add Phrases' section, stating: 'Phrase does not match with the subsequent phrases. Delete the phrase to validate moment.' The phrase 'good morning i have received call from your side' is highlighted in red.
  - Buttons:** 'Take Action' dropdown, 'Cancel', and 'Confirm' buttons are visible.

# Moment Creation: Validation Success

If all errors are resolved, user will see the moment created successfully page.

Click on “Give Feedback” to give start giving feedback required for moment activation



The screenshot displays the CalZen user interface for creating a moment. The top navigation bar includes 'Dashboard' and 'Calls', with the current page titled 'Create Moment'. The left sidebar shows a 'Moments' section with a 'Select Teams' dropdown and an 'Active Status: Active X' indicator. Below this, there are tabs for 'Call' and 'Chat', and a list of moment categories including 'Moments', 'QS: Token NB', 'QS: Source NB', 'QS: Tenant Name NB', 'OnDemand Support', 'CX ask Callback', 'Number of Contacts', 'OB Sales: Super Assure Plan', and 'OB Sales: Assure Plan'. The main content area is divided into four tabs: 'Details', 'Definition', 'Feedback' (which is active), and 'Tagging Attributes'. A 'Playground' link is visible in the top right corner. The central message reads 'Moment Created Successfully!' accompanied by a green thumbs-up icon and a red thumbs-down icon. Below this, it says 'One last step!' and 'Moment Tagging Feedback'. A sub-message explains: 'Help CalZen tag your moments better, complete the phrase-match feedback to improve and activate the moment'. A prominent purple 'Give feedback' button is centered below the text. A 'Next' button is located in the bottom right corner of the main content area.

# Moment Creation: Feedback

This feedback is used to more accurate moment tagging, so please provide the feedback carefully

The screenshot shows the 'Create Moment' interface in the Callzen system. The left sidebar contains navigation options like 'Dashboard', 'Calls', and 'Moments'. The main content area is divided into tabs: 'Details', 'Definition', 'Feedback', and 'Tagging Attributes'. The 'Feedback' tab is active, displaying a 'Select The Right Phrases' section with instructions to pick phrases that match the moment. Below this is a 'Feedback Score' of 60%, with a note that higher scores lead to better tagging. To the right, a 'Phrase Match Feedback' section lists ten phrases, each with a thumbs up and thumbs down icon for user input. A 'Submit' button is located at the bottom right of the feedback list.

**Select The Right Phrases**  
From the phrases shown, pick all the ones which matches the moment created by you.

Yes, the phrase is a good match: No, the phrase is a bad match

**Feedback Score**  
Higher the feedback score, better the moment tagging. **60%** Good Score

**Phrase Match Feedback**

- hmm good morning chatan
- yeah mam good afternoon
- yeah hai good good afternoon
- yes sir good morning tell me
- yeah rinkiji good morning
- hai mam ah ah good morning yes tell me
- ah good morning shes tell me
- good morning yeah mam tell me
- good morning tell me madam
- ah yeah mam ha good afternoon

Submit

Give the feedback by clicking on thumbs up and down button.

Thumbs up: The phrase is relevant

Thumbs down: The phrase is not relevant

# Moment Creation: Tagging Attributes

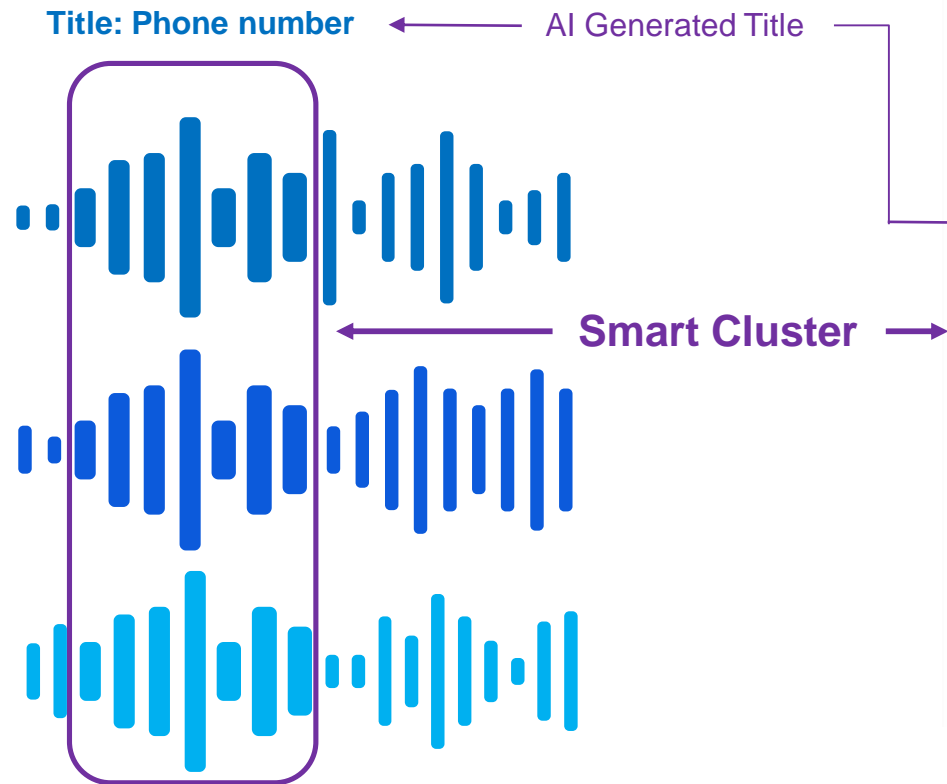
The moment can be activated by clicking on “tag from now” toggler

The screenshot shows the 'Create Moment' interface in the Callzen system. The 'Tagging Attributes' tab is active, showing options for 'Moment Activation' (with a 'Tag from now' toggle), 'Moment Tagging Type' (radio buttons for 'Loosely', 'Normally', and 'Strictly'), 'Tag for previous calls' (with a 'Select date' dropdown), and 'Actionable Moment' (with an 'Enable' toggle). A calendar icon is overlaid on the 'Tag for previous calls' section. A 'Finish' button is visible at the bottom right.

The user can choose to loosely or strictly tag the moment. Loose tagging will lead to more false positives.

To tag the defined moment on previous calls, select the duration from the dropdown and submit.

# Smart Clusters



Name	Analysed Transcripts	Clusters	Moments Created	Clustering Density	User Name	Request Date
Cross Sell Offer Pitch	45K	508	50	3	Aahan Sharma	Dec 15, 2022 04:06 PM

Smart Moments (190)	Other Clusters (245)	Update cluster with 15,345 new calls
<b>Troubleshooting Poor Audio Quality</b> <span>New</span>	<b>Asking for Contact Number of the Customer</b> <span>New</span>	<b>Explaining Plan Benefits</b>
Moment Details	Moment Details	Moment Details
8% Calls Present > <a href="#">View Moment</a>	30% Calls Present > <a href="#">View Moment</a>	25% Calls Present > <a href="#">View Moment</a>
Moment Phrases (18)	Moment Phrases (9)	Moment Phrases (8)
<b>Explaining Payment Details to the Customer</b>	<b>Providing Information About Refund</b>	<b>Explaining Plan Validity</b>
Moment Details	Moment Details	Moment Details
12% Calls Present > <a href="#">View Moment</a>	2% Calls Present > <a href="#">View Moment</a>	20% Calls Present > <a href="#">View Moment</a>
Moment Phrases (17)	Moment Phrases (13)	Moment Phrases (18)

\*Smart Clusters can be used to automatically create moments or get uncover patterns are occurring in calls. These can also be used to get user insights.

# Smart Clusters: Create New Job

To create a job, click on “*Create New Cluster*” on the top right corner and fill the required details. The fields may vary based on the organization configuration

The screenshot displays the Calzen Smart Clusters interface. A modal window titled "Create New Cluster" is open, allowing users to configure a new cluster. The background interface shows a navigation bar with options like Dashboard, Calls, Chats, Agents, Moments, Smart Clusters, Checklist, Automation, Coaching, and Settings. The main content area includes a "Smart Moments" section with a list of moments and a "Create new Cluster" button in the top right corner.

The "Create New Cluster" modal form contains the following fields:

- Group Name \***: Hood Subscriptions - Agent
- Campaign Name \***: HoodSubscription
- Mode Of Calling \***: manual, Inbound
- Process Name \***: BSubServiceOUT, BSubServiceIN
- Caller Type**: agent
- Clustering Density**: A slider control.

A green "Create Cluster" button is located at the bottom right of the modal. The background interface also shows a table with columns for Request Date, Status, and Action, and a search bar.



# Smart Clusters

All the created clusters / moments can be seen by opening the accordion associated with the job

The screenshot displays the Callzen Smart Clusters interface. At the top, there is a navigation bar with various icons and a user profile. Below this, the 'Smart Clusters' section is active, showing a 'Select Teams' dropdown and a 'Create new Cluster' button. The main content area is divided into 'Call' and 'Chat' tabs. A table lists the clusters with the following data:

Group Name	Analysed Transcripts	Clusters	Moments Created	Clustering Density	User Name	Request Date	Status	Action
Inbound outgoing calls	11688	33	15	1	Tanmay Saxena	Aug 02, 2023 04:48 PM	Completed	^

Below the table, there are tabs for 'Smart Moments' and 'All Clusters'. The 'Smart Moments' tab is selected, showing three clusters with their respective moments:

- Enquiring About Rental Budget**: Moments include 'what is your minimum to maximum rental budget', 'sir dekhiye uss time me hame uss time ke hisaab se check karna padega sir kitna yaha pe rent budget ja raha hain kitna plans ji', and 'one eight two aur maximum rent budget kitna rahega aapka'. It is typically present in 1% calls.
- Enquiring About Bachelors Staying in the Property**: Moments include 'it is for family or it is for bachelor', 'right and are you looking for ah are you going to stay with your family or are you looking for bachelors', 'ah i am looking for male pg actually', and 'so this are you looking out for family for'. It is typically present in 2% calls.
- Explaining the Process of Connecting with perso**: Moments include 'so you will be getting a call from joti', 'aap abhi call matlab mein hi poochte karta hun call aap', 'i will disconnect and i will come back to you', and 'a mere ko call aa raha ha uske baat karke pir'. It is typically present in 5% calls.

At the bottom, there are toggle switches for 'Enable auto tag' and 'Enable auto update'. The page number '1 - 25 of 121' is visible at the bottom right.

\*Only relevant clusters are created as Smart Moments. The rest can be seen by clicking “All Clusters”

# Checklists

Checklists are set of moments which can be used to evaluate the call against a script.

Checklist Name	Campaign Name	Caller Type	Mode of calling	Process Name	Created Date	Actions
Tenant Assure Plan Checklist	RMSales	agent	Inbound +2 more	SalesTenantOUT +7 more	Aug 23, 2023 4:41 PM	<input checked="" type="checkbox"/> <span>▼</span>
Tenant Freedom Plan Checklist	RMSales	agent +1 more	manual +2 more	TenantAuto2IN +7 more	Aug 23, 2023 4:41 PM	<input checked="" type="checkbox"/> <span>▼</span>
Tenant Relax Plan Checklist	RMSales	agent	Auto +2 more	TenantAutoIN +7 more	Aug 23, 2023 4:39 PM	<input checked="" type="checkbox"/> <span>▼</span>

All the created checklists can be seen on "Checklist" page.

The checklist can be activated or deactivated by clicking on the toggler under the "Actions" column

# Checklist Creation: Details

On clicking **Create Checklist** on the checklist page, Checklist creation flow will start

The screenshot shows the 'Create Checklist' form in the Calzen system. The form is titled 'Create Checklist' and has tabs for 'Details', 'Moments', and 'Condition'. The 'Details' tab is active. The form contains the following fields:

- Checklist Name\***: Plan Checklist
- Checklist Description**: Description
- Conversation Type\***: Call
- Checklist Filter Scope\***: Filter, Team

Below these fields are 'Call filters' with dropdowns for 'Tenant Sales Agents', 'customer', and 'agent'. At the bottom right are 'Save as Draft' and 'Next' buttons.

Add the relevant information in the space provided. The fields may vary based on the organization configuration

# Checklist Creation: Moments Addition

Add the active moments from the left side. The global moments can be found by selecting the Global radio button. The rest of the moments can be found under filter.

The screenshot shows the 'Create Checklist' interface. On the left, there is a table of existing checklists:

Checklist Name	Campaign Name
Tenant Assuro Plan Checklist	RMSales
Tenant Freedom Plan Checklist	RMSales
Tenant Relax Plan Checklist	RMSales

The main interface is the 'Create Checklist' modal, which has three tabs: 'Details', 'Moments', and 'Condition'. The 'Moments' tab is active. It features a search bar for 'Add Moments' and a list of moments with plus signs next to them. The 'Added Moments' section shows a list of 5 moments that have been added to the checklist:

- 1 rapport building
- 2 Tenant Budget
- 3 Location
- 4 Refund explanation
- 5 RM Intro

At the bottom of the modal, there are 'Save as Draft' and 'Next' buttons.

Add the moments to the checklist

The user may or may not give the weightage to moments. But it should be consistent. Either weightage must be given to all moments or none

# Checklist Creation: Moments Addition

Weighted checklist can be used by adding weightages.

The screenshot shows the 'Create Checklist' interface in Callzen. The 'Moments' tab is active, displaying a list of moments to be added to the checklist. The 'Added Moments' section shows five items with their respective weightages:

Order	Moment	Weightage
1	rapport building	+ 5
2	Tenant Budget	+ 20
3	Location	+ 20
4	Refund explanation	+ 10
5	RM Intro	+ 5

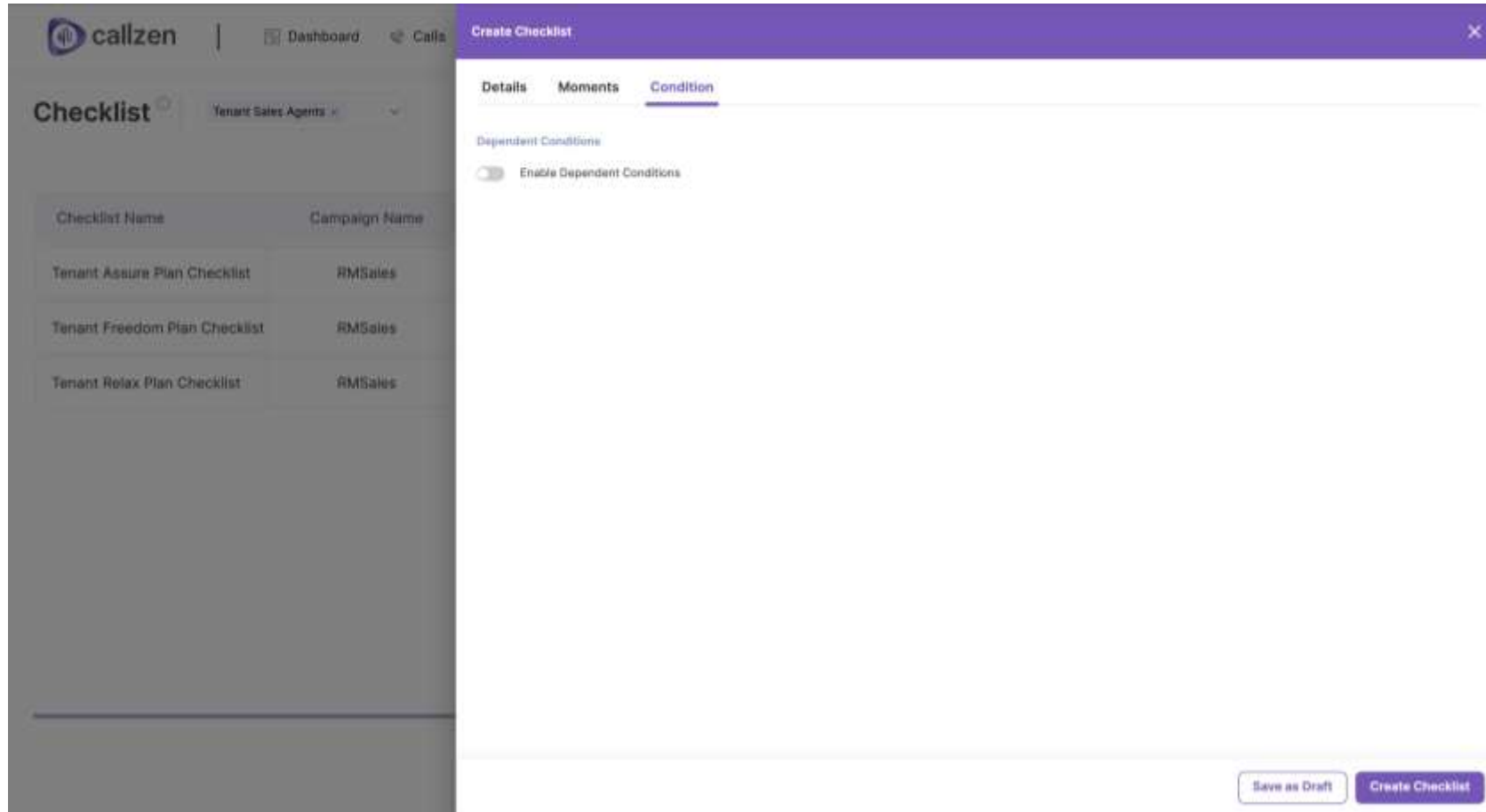
The user need to add weightage to all the moments added if it is given to any of the moment.

\*The call score will be calculated based on the weightage defined.

\*If no weightage is given, all moments are given equal weightage by default.

# Checklist Creation: Conditionality

The checklist can be conditionally eligible or not.



If unconditional, then, it will be eligible across all the calls that match against the call filters defined in the details page

# Checklist Creation: Conditionality

If conditionality is enabled, then, it will be eligible only across all those calls, where the condition is met.

Currently, the condition can be based on the moments only.

The screenshot shows the 'Create Checklist' interface in the Calzen system. On the left, there is a table of existing checklists:

Checklist Name	Campaign Name
Tenant Assure Plan Checklist	RMSales
Tenant Freedom Plan Checklist	RMSales
Tenant Relax Plan Checklist	RMSales

The main area is the 'Create Checklist' form, currently on the 'Condition' tab. It features a toggle for 'Enable Dependent Conditions' which is turned on. Below this is the 'Add Dependencies' section, which includes a 'FIELD' dropdown set to 'Moments', an 'CONDITION' dropdown with a menu open showing options: 'Present', 'Not Present', 'Present is any one of', and 'Present is not one of', and an 'ID/NAME' dropdown set to 'SELECT...'. At the bottom right, there are 'Save as Draft' and 'Create Checklist' buttons.

The conditions can be one of four condition:

Present: ALL Present

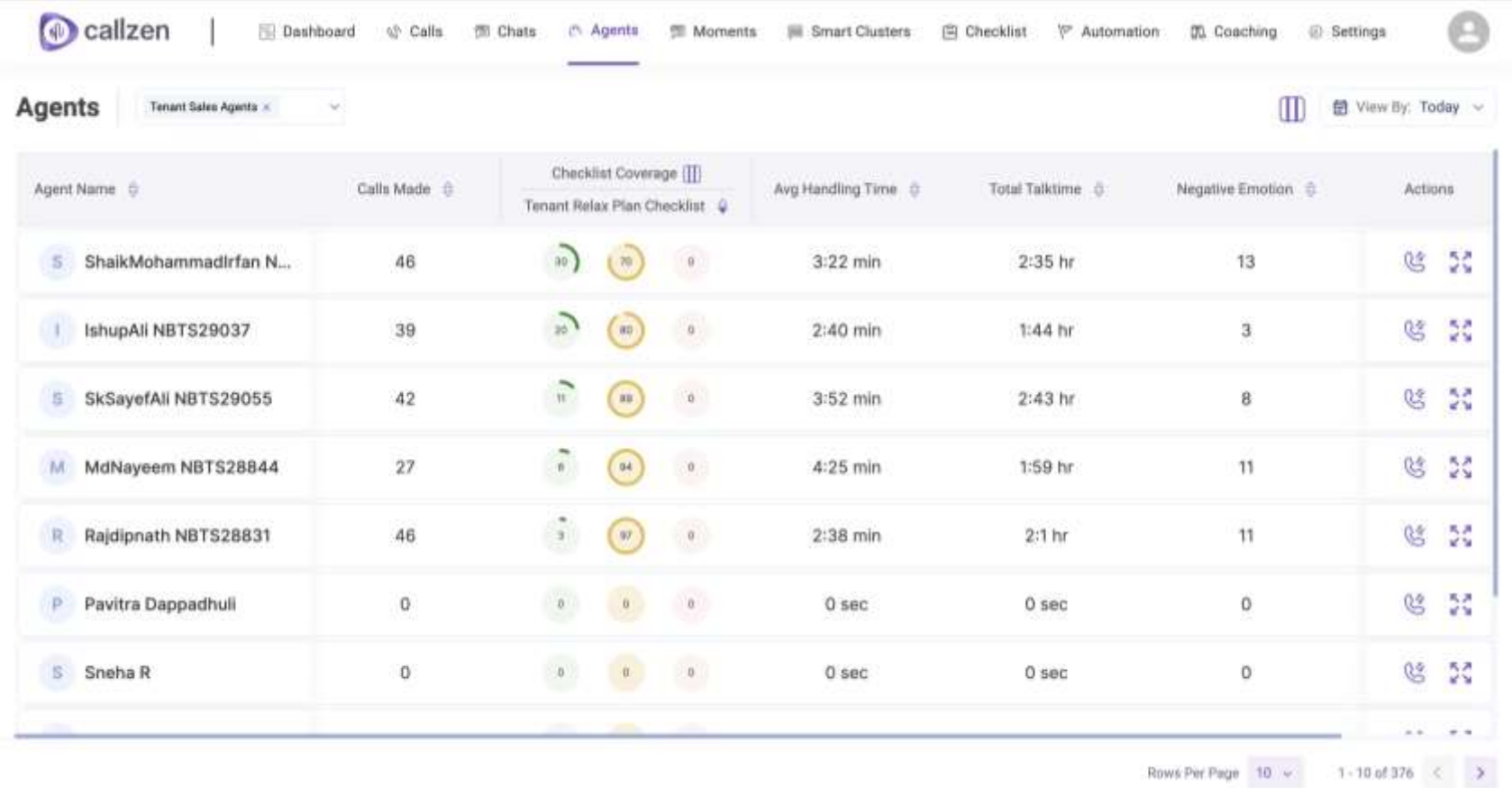
Not Present: ALL these should not be present together

Present is any one of: OR condition

Present is not one of: any of the moments should not be present

# Agent Screen

The user can view all the agents under the selected team under the Agents team



The screenshot shows the Callzen Agents interface. At the top, there is a navigation bar with the Callzen logo and menu items: Dashboard, Calls, Chats, Agents (selected), Moments, Smart Clusters, Checklist, Automation, Coaching, and Settings. Below the navigation bar, the page title is 'Agents' and the selected team is 'Tenant Sales Agents'. There is a 'View By: Today' dropdown menu. The main content is a table with the following columns: Agent Name, Calls Made, Checklist Coverage (Tenant Relax Plan Checklist), Avg Handling Time, Total Talktime, Negative Emotion, and Actions. The table lists seven agents with their respective metrics. At the bottom right, there is a pagination control showing 'Rows Per Page 10' and '1 - 10 of 376'.

Agent Name	Calls Made	Checklist Coverage Tenant Relax Plan Checklist	Avg Handling Time	Total Talktime	Negative Emotion	Actions
S ShaikMohammadIrfan N...	46	90 70 0	3:22 min	2:35 hr	13	📞 🔍
I IshupAli NBTS29037	39	20 80 0	2:40 min	1:44 hr	3	📞 🔍
S SkSayefAli NBTS29055	42	11 88 0	3:52 min	2:43 hr	8	📞 🔍
M MdNayeem NBTS28844	27	6 04 0	4:25 min	1:59 hr	11	📞 🔍
R Rajdipnath NBTS28831	46	3 97 0	2:38 min	2:1 hr	11	📞 🔍
P Pavitra Dappadhuli	0	0 0 0	0 sec	0 sec	0	📞 🔍
S Sneha R	0	0 0 0	0 sec	0 sec	0	📞 🔍

🔍 The individual agent details can be view by clicking on the icon under the Actions column

📞 View the calls done by the agent



# Agents Screen: More Details

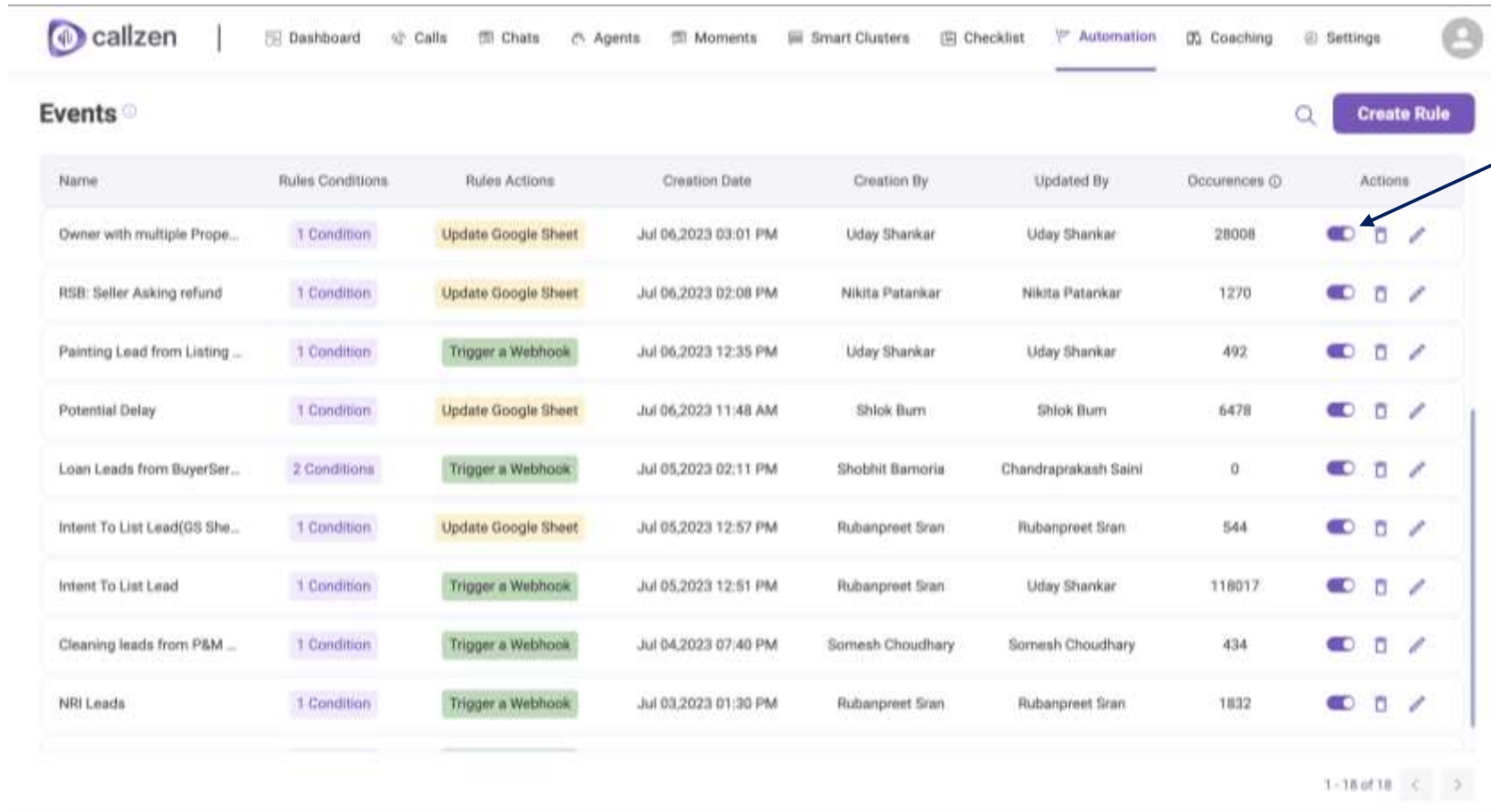
The screenshot displays the Calzen Agents interface. A modal window is open for agent ShaikMohammadIrfan NBTS29040, showing the following statistics:

- 46** Calls Made
- 46 / 46** Customers Reached
- 189 WPM** Average Talk Speed (range: 178 WPM to 211 WPM)
- 203 secs** Average Handling Time (range: 27 secs to 235 secs)
- 0%** Talk Ratio Per Call
- 28.26%** Negative Customer Sentiments

The background shows a list of other agents and a navigation menu with options like Dashboard, Calls, Chats, Agents, Moments, Smart Clusters, Checklist, Automation, Coaching, and Settings. The bottom of the screen shows pagination: Rows Per Page 10, 1 - 10 of 376.

# Automations

Under automation tab, the user can view all the rules defined under the current configuration



Name	Rules Conditions	Rules Actions	Creation Date	Creation By	Updated By	Occurrences	Actions
Owner with multiple Prope...	1 Condition	Update Google Sheet	Jul 06,2023 03:01 PM	Uday Shankar	Uday Shankar	28008	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
RSB: Seller Asking refund	1 Condition	Update Google Sheet	Jul 06,2023 02:08 PM	Nikita Patankar	Nikita Patankar	1270	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Painting Lead from Listing ...	1 Condition	Trigger a Webhook	Jul 06,2023 12:35 PM	Uday Shankar	Uday Shankar	492	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Potential Delay	1 Condition	Update Google Sheet	Jul 06,2023 11:48 AM	Shlok Bum	Shlok Bum	6478	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Loan Leads from BuyerSer...	2 Conditions	Trigger a Webhook	Jul 05,2023 02:11 PM	Shobhit Bamoria	Chandraprakash Saini	0	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Intent To List Lead(GS She...	1 Condition	Update Google Sheet	Jul 05,2023 12:57 PM	Rubanpreet Sran	Rubanpreet Sran	544	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Intent To List Lead	1 Condition	Trigger a Webhook	Jul 05,2023 12:51 PM	Rubanpreet Sran	Uday Shankar	118017	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Cleaning leads from P&M ...	1 Condition	Trigger a Webhook	Jul 04,2023 07:40 PM	Somesh Choudhary	Somesh Choudhary	434	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
NRI Leads	1 Condition	Trigger a Webhook	Jul 03,2023 01:30 PM	Rubanpreet Sran	Rubanpreet Sran	1832	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

The rules can be activated/deactivated on

\*Automations/Connectors can be used to take actions if a trigger event has occurred in a call, for example, voice issue moment has occurred, or long silence highlight, or negative customer sentiment has been identified etc.

# Automation: Create Rule ( Triggers )

To create a rule, click on **Create Rule** button on the top right of the page.

The screenshot displays the 'Create Rule' modal in the Calzen application. The modal is titled 'Create Rule' and has a close button (X) in the top right corner. It is divided into three main sections:

- Rule Name:** A text input field labeled 'Automation Name'.
- Rule Conditions are:** A section for defining triggers. It includes a 'FIELD' dropdown set to 'Moments', a 'CONDITION' dropdown set to 'Present', and an 'ITEMS' dropdown set to 'Select...'. Below these are three radio button options: 'Not Present', 'Present is any one of', and 'Present is not one of'. An 'Add new field' button is also present.
- Perform these actions:** A section for defining actions. It includes a 'FIELD' dropdown set to 'Trigger a Webhook', a 'REQUEST TYPE' dropdown set to 'POST', and a 'URL' input field.

At the bottom of the modal, there are 'Reset' and 'Save' buttons. An arrow from the text on the right points to the 'ITEMS' dropdown in the 'Rule Conditions are' section.

The triggers for the rule can be selected out of the options defined in the dropdown

# Automation: Create Rule ( Actions )

If the trigger is present, then the defined action will be performed.

The screenshot displays the 'Create Rule' interface in the Callzen system. The background shows a table of existing rules with columns for Name, Rules Conditions, Rules Actions, Creation Date, and Creation User. The foreground shows a modal window for creating a new rule, with a dropdown menu open for selecting an action. The dropdown menu lists several options, with 'Trigger a Webhook' highlighted. An arrow points from the text on the right to this highlighted option.

Name	Rules Conditions	Rules Actions	Creation Date	Creation User
PrM partner asking to can...	1 Condition	Update Google Sheet	Jul 19,2023 08:13 PM	Shlok B
Request More Properties	1 Condition	Trigger a Webhook	Jul 19,2023 07:29 PM	Abhinav B
RA to PrM bot	1 Condition	Trigger a Webhook	Jul 18,2023 06:26 PM	Shlok B
RA to PrM leads	1 Condition	Update Google Sheet	Jul 17,2023 07:31 PM	Shlok B
Listing from HTS	1 Condition	Trigger a Webhook	Jul 13,2023 02:50 PM	Tanmay S
Premium Targeting	1 Condition	Update Google Sheet	Jul 06,2023 03:09 PM	Ravi R
Owner with multiple Prope...	1 Condition	Update Google Sheet	Jul 06,2023 03:01 PM	Uday Sha
RBB: Seller Asking refund	1 Condition	Update Google Sheet	Jul 06,2023 02:08 PM	Nikita Pat
Painting Lead from Listing ...	1 Condition	Trigger a Webhook	Jul 06,2023 12:35 PM	Uday Sha

**Perform these actions**

FIELD ID

Trigger a Webhook

- Send an Email
- Trigger a Webhook
- Update Google Sheet
- Add Note
- Add Tag
- Update Disposition
- Set Custom Field
- Send Slack Alert

JSON (OR JSON)

```
{  
  "campaign": "callzen-crm-lead-prm",  
  "process": "Lead from Listing"}
```

Reset Save

The action can be chosen from the drop down and the relevant fields filled