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Case Quality Assurance App

Installation & User Guide



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OVERVIEW

The Case Quality Assurance App is designed for the QA Analyst who can perform the case QA right on the case itself and for the leadership team who can judge the performance of the agent by reviewing how he has performed on the laid down standards by checking the score the case agent has achieved based on the defined QA parameter.

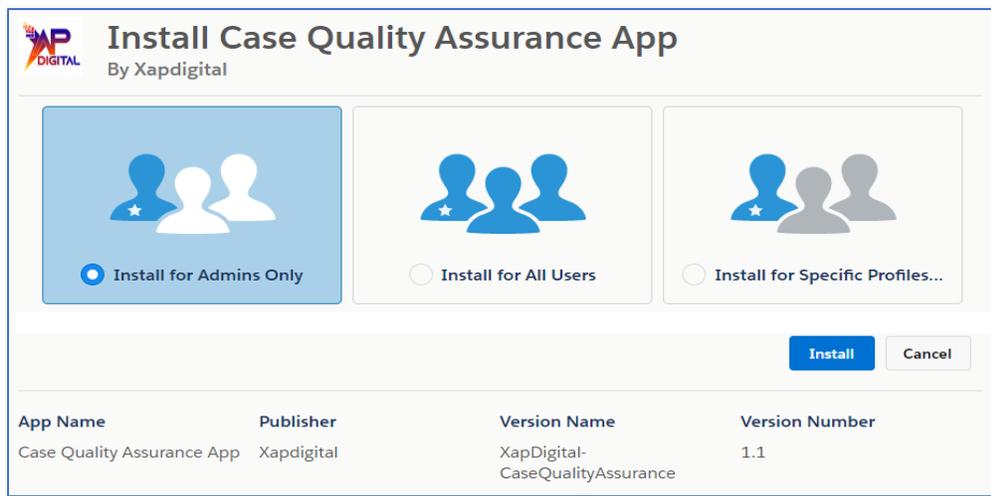
The case QA scores agent has achieved can be used on the various reports to evaluate the overall performance of the agent on weekly/monthly basis and will also help in deciding if the agent need any specific training's to improve his case working skills.



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INSTALLATION STEPS FOR CASE QUALITY ASSURANCE APP

- Use this URL to install the package into any organization:
 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t3t000002zMYz>
- Note: If you are installing into a sandbox organization you must replace the initial portion of the URL with **http://test.salesforce.com**
- Select one of the installation options as shown below and click on “**Install**” button.



App Name	Publisher	Version Name	Version Number
Case Quality Assurance App	Xapdigital	XapDigital-CaseQualityAssurance	1.1



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- Wait till the App finish installing.



Install Case Quality Assurance App

By Xapdigital

 **Installing and granting access to admins Only...**

App Name	Publisher	Version Name	Version Number
Case Quality Assurance App	Xapdigital	XapDigital-CaseQualityAssurance	1.1

Description
The Case Quality Assurance App is designed for the QA Analyst / Leadership team who can perform the case QA and evaluate the performance of an agent right from within the case itself.

Additional Details [View Components](#)

- Click on '**Done**' button once the installation is complete.



Install Case Quality Assurance App

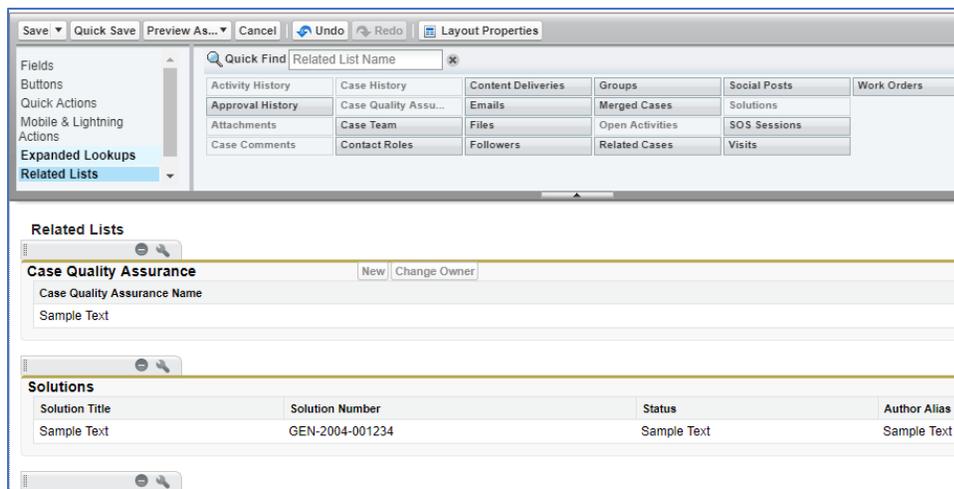
By Xapdigital

 **Installation Complete!**

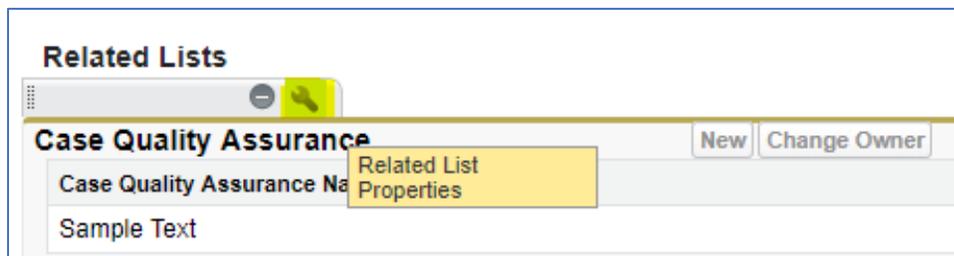
App Name	Publisher	Version Name	Version Number
Case Quality Assurance App	Xapdigital	XapDigital-CaseQualityAssurance	1.1

Description
The Case Quality Assurance App is designed for the QA Analyst / Leadership team who can perform the case QA and evaluate the performance of an agent right from within the case itself.

- Perform the post-installation configurations as shown below:
- Drop the '**Case Quality Assurance**' related list on the case layout.



- Edit the related list properties and add additional fields to the list as shown below and click 'Save' button





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Related List Properties - Case Quality Assurance

Columns Help ?

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields		Selected Fields
Notes & Details		Case Quality Assurance Name
Owner Alias		QA Reviewer
Owner First Name	Add	QA Performed Date
Owner Last Name	Remove	QA Pass/Fail
QA Summary		Score
Record ID		
Timely Updates		
Understanding of the issue		

Sort By: Ascending Descending

Buttons +

OK Cancel Revert to Defaults

- Assign the permission set '**Access to Case Quality Assurance App**' to any user who need access to Case Quality Assurance object, as shown below.

User
John Smith

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#)
[Third-Party Account Links \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#)

User Detail Edit Sharing Reset Password Freeze

Name	John Smith
Alias	jsmit
Email	john@example.com



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Permission Set Assignments **Edit Assignments**

No records to display

Available Permission Sets		Enabled Permission Sets
<ul style="list-style-type: none">Access to Case Quality Assurance AppCase FeedSalesforce CMS Integration Admin	<p>Add</p> <p>▶</p> <p>Remove</p> <p>◀</p>	<p>--None--</p>
<p>Save Cancel</p>		



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- Please ensure that the Profile of the user who need access to '**Case Quality Assurance**' app must have following Field-Level Security permissions on the fields, as shown below.

Save Cancel			
Field Name	Field Type	Read Access	Edit Access
Adhere To Time Zone	Picklist	✓	✓
Case Agent	Lookup	✓	✓
Case Documentation	Picklist	✓	✓
Case Quality Assurance Name	Text	✓	✓
Complete/Meaningful Update	Picklist	✓	✓
Created By	Lookup	✓	<input type="checkbox"/>
Good Communication	Picklist	✓	✓
Improvement Areas	Long Text Area	✓	✓
Last Modified By	Lookup	✓	<input type="checkbox"/>
Notes & Details	Rich Text Area	✓	✓
Owner	Lookup	✓	✓
QA Pass/Fail	Picklist	✓	✓
QA Performed Date	Date	✓	✓
QA Reviewer	Lookup	✓	✓
QA Summary	Text Area	✓	✓
Related Case	Lookup	✓	✓
Score	Percent	✓	✓
Timely Updates	Picklist	✓	✓
Understanding of the issue	Picklist	✓	✓



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GETTING STARTED WITH CASE QUALITY ASSURANCE APP

- Navigate to the Case Quality Assurance Relation list on the Case layout and click on the '**New Case Quality Assurance**' button.

Case Detail Edit Delete Close Case Clone Sharing

Case Owner	<input type="checkbox"/> Amit Sharma <a>(Change)
Contact Name	
Account Name	
Escalated	<input type="checkbox"/>
Subject	Activity 2: Collaborate on a Case
Description	Learn how Service Cloud allows agents to easily collaborate on cases.
Type	Trial
Status	New
Priority	Medium
Contact Phone	
Contact Email	
Case Origin	

Edit Delete Close Case Clone Sharing

Case Quality Assurance New Case Quality Assurance Case Quality Assurance Help ?

No records to display



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- Enter the requested information to record agent's performance on the case.

The screenshot shows the 'Case Quality Assurance Edit' form. It includes sections for 'Information', 'Initial & Ongoing Process Adherence', 'Communication', 'QA Notes', and 'Score'. The 'Information' section contains fields for Case Quality Assurance Name, Related Case, Case Agent, QA Summary, QA Reviewer, QA Performed Date, and Improvement Areas. The 'Initial & Ongoing Process Adherence' section has dropdowns for Timely Updates?, Adhere To Time Zone, Complete/Meaningful Update?, and Case Documentation. The 'Communication' section has dropdowns for Understanding of the Issue? and Good Communication. The 'QA Notes' section has a rich text editor with a toolbar and a text area containing a note about the QA process. The 'Score' section has a dropdown for QA Pass/Fail and a text input for Score.

- Each QA parameter field has 3 options:
- 'Yes' - select this option, if agent qualify for it.
- 'No' - select this option, if agent did not qualify for it.
- 'N/A' - select this option, if the parameter is not applicable for evaluating the agent.

This close-up shows the dropdown menus for 'Initial & Ongoing Process Adherence' and 'Communication'. The 'Adhere To Time Zone' dropdown is open, showing options 'Yes', 'No', and 'N/A'. Other dropdowns for 'Timely Updates?', 'Complete/Meaningful Update?', 'Case Documentation', 'Understanding of the issue?', and 'Good Communication' are also visible, all showing 'Yes' or 'N/A' as selected options.



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- After entering the details, click on '**Save**' button. The '**QA Pass/Fail**' result will be generated along with the '**Score**' of an agent and will be displayed on the detail screen.
- **Note:** The pass percentage threshold value is **75%**, so if the agent scores above it then the result will be '**Pass**' else '**Fail**'

Case Quality Assurance
Case QA Review

[Open Activities \(0\)](#) | [Activity History \(0\)](#)

◀ [Back to List: Users](#)

Edit Delete Clone Sharing

Case Quality Assurance Name	Case QA Review	Related Case	00001005
QA Summary	Case Review the evaluate the performance of the case agent.	Case Agent	John Smith
QA Reviewer	Navratan Chowhan	QA Performed Date	8/19/2020
Improvement Areas	The agent took all the necessary steps to resolve client issue but case documentation is not done appropriately. The agent will need to be coached to make improvement in this area.		

▼ **Initial & Ongoing Process Adherence**

Timely Updates?	Yes	Complete/Meaningful Update?	Yes
Adhere To Time Zone	N/A	Case Documentation	No

▼ **Communication**

Understanding of the Issue?	Yes
Good Communication	Yes

▼ **QA Notes**

Notes & Details	The QA on this case is done based on the request from the Agent's Manager to identify any missing gaps from agent's point of view, which resulted in low score survey returned.
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▼ **Score**

QA Pass/Fail	Pass	Score	80.00%
Created By	Amit Sharma , 8/19/2020, 2:34 AM	Last Modified By	Amit Sharma , 8/19/2020, 2:34 AM



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Thank You