



## Call analysis and call summary

## **Call summaries for agent calls**

With the number of calls that agents make throughout the day, it would be very intuitive and easy for agents to have access to summaries of the calls they made to clients. Keeping notes and referring to recordings can only take you so far and also can take time. And time is money.

As a system that has always been using AI and intelligent systems to push forward the collections industry, we have brought in an AI to help the agents take a quick look at the calls they made.

The AI tool will not only summarize the full call that an agent has made, but will also analyze the call to bring attention to important points within the call, for example; if the agent said the mini Miranda to the consumer.

All this and more will be available in this exciting new feature in RMEx.

## **Call summary setup**

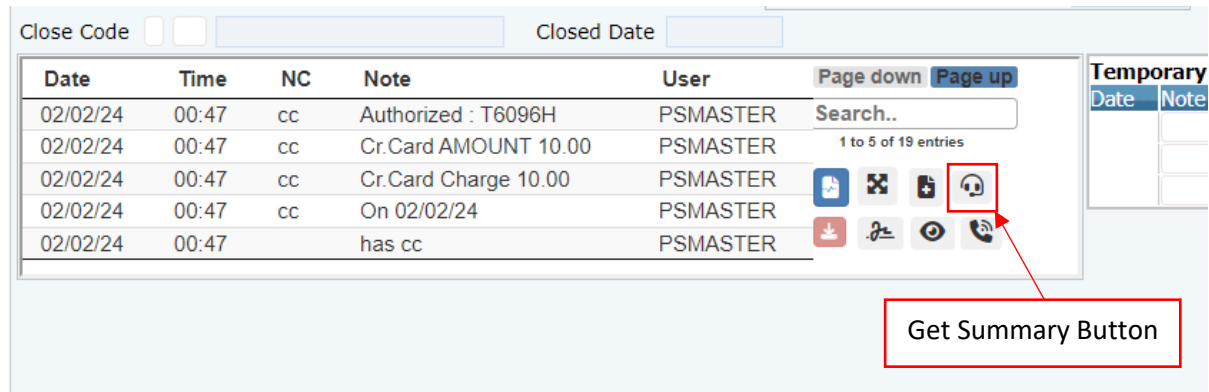
Please contact Quantrax to get set up with the call summary feature and to get started with training programs for agents as required.

## Call Summary and Analysis

### Usage and features

All call summary related features are available in the new notes area in the GUI.

Once a call is made, the agent can click on the generate call summary button. The Agent will then be shown a list of calls that were made to that account.



The screenshot shows a call log table with columns: Date, Time, NC, Note, User, and a set of action icons. A red box highlights the 'Get Summary Button' (represented by a headset icon) in the action column for the first row. A callout box labeled 'Get Summary Button' points to this icon. The table contains five entries, all with a date of 02/02/24 and a user of PSMATER. The notes include 'Authorized : T6096H', 'Cr.Card AMOUNT 10.00', 'Cr.Card Charge 10.00', 'On 02/02/24', and 'has cc'. A search bar and pagination controls are also visible.

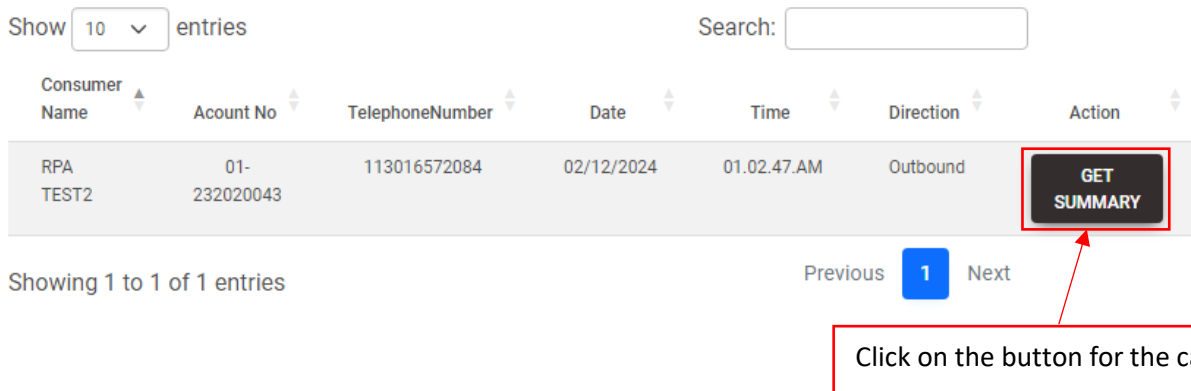
Date	Time	NC	Note	User	Action
02/02/24	00:47	cc	Authorized : T6096H	PSMASTER	[Headset icon]
02/02/24	00:47	cc	Cr.Card AMOUNT 10.00	PSMASTER	[Download icon]
02/02/24	00:47	cc	Cr.Card Charge 10.00	PSMASTER	[Share icon]
02/02/24	00:47	cc	On 02/02/24	PSMASTER	[Refresh icon]
02/02/24	00:47		has cc	PSMASTER	[Phone icon]

Clicking on the get summary button next to the call will enable the AI to go through the call and to generate the summary. Depending on the call length and clarity of the call, this might take some time.

The agent will then be given the option to either view or edit the summary and transcript of the call, and to save any changes.

### RMEEx Call Summary

Account Number: 01-232020043



The screenshot shows the RMEEx Call Summary interface. It includes a search bar, a 'Show 10 entries' dropdown, and a table of call records. A red box highlights the 'GET SUMMARY' button in the 'Action' column for the first row. A callout box labeled 'Click on the button for the call.' points to this button. The table has columns: Consumer Name, Account No, TelephoneNumber, Date, Time, Direction, and Action. The first row shows a call to RPA TEST2 on 02/12/2024 at 01.02.47 AM, Outbound.

Consumer Name	Account No	TelephoneNumber	Date	Time	Direction	Action
RPA TEST2	01-232020043	113016572084	02/12/2024	01.02.47 AM	Outbound	GET SUMMARY

The summary popup also shows additional information on the call. The AI will always track if the agent gave the mini Miranda wording ("This is an attempt to collect a debt") to the customer on the call.

Based on the conversation, the screen will also display the confidence level of the call and customer to get better analytics on the calls.

## Call Summary

The screenshot shows a 'Call Summary' interface for account number 01-240300003. At the top, there is a blue button labeled '← BACK TO SUMMARY' (callout 1) and a green box containing the text 'The agent succeeded in mentioning the Mini-Miranda.' (callout 2). To the right, a 'Confident: ▲ 100%' indicator is shown (callout 2). Below this is a section for 'Duration: 01:18:35' (callout 3). The main content consists of two text boxes: 'Summary' (callout 3) and 'Transcript' (callout 4). The 'Summary' box contains the text: 'A representative from Prince Parker, Australia calls and asks for Matrix, but there is some confusion at first. The representative then asks for verification and explains that they are calling about a debt owed to CRH for \$100. The representative asks Matrix to send payment information and makes a payment today.' The 'Transcript' box contains a verbatim transcript of the call. At the bottom right, there is a green 'UPDATE' button (callout 5).

1. This shows if the Agent mentioned the mini-Miranda in the conversation.
2. This shows the confidence level of the summary that is generated.
3. The first text box shows the summary based on the call. This can be edited if permission is given.
4. The second text box displays the transcript of the call. This can be edited if permission is given.
5. Clicking the 'Update' button will finalize any edits and save the call summary.

NOTE: The summary can **only** be edited once. After edits are saved, it cannot be edited again.

Only calls made on that day is available to be requested for call summaries. Once requested and saved, the saved summaries will be available in the account.

The agent can view the available summaries at any time by clicking on the call summary button.

## Call Summary and Analysis

Close Code  Closed Date

Date	Time	NC	Note	User	Page down	Page up	Temporary
02/02/24	00:47	cc	Authorized : T6096H	PSMASTER	Search..		Date
02/02/24	00:47	cc	Cr.Card AMOUNT 10.00	PSMASTER	1 to 5 of 19 entries		Note
02/02/24	00:47	cc	Cr.Card Charge 10.00	PSMASTER			
02/02/24	00:47	cc	On 02/02/24	PSMASTER			
02/02/24	00:47		has cc	PSMASTER			

View Summary Button

Notes are also added on the account. The call summary can also be viewed by clicking on the linked call summary note.

Notes						
Date	Time	NC	Note	User	Page down	Page up
02/01/24	07:57		MOVED TO PSNITE Q	PSMASTER	Search..	
02/02/24	10:45		MOVED TO PSNITE Q	PSMASTER	1 to 5 of 39 entries	
02/03/24	10:25		MOVED TO PSNITE Q	PSMASTER		
02/04/24	10:37		MOVED TO PSNITE Q	PSMASTER		
02/12/24	02:52	CS	"VIEW CALL SUMMARY"	PSNITE		

Both will open a window with the available call summaries for that account.

The transcript is available in the text history window.

## Preview All Call Summary

Account Number: 01-240300004

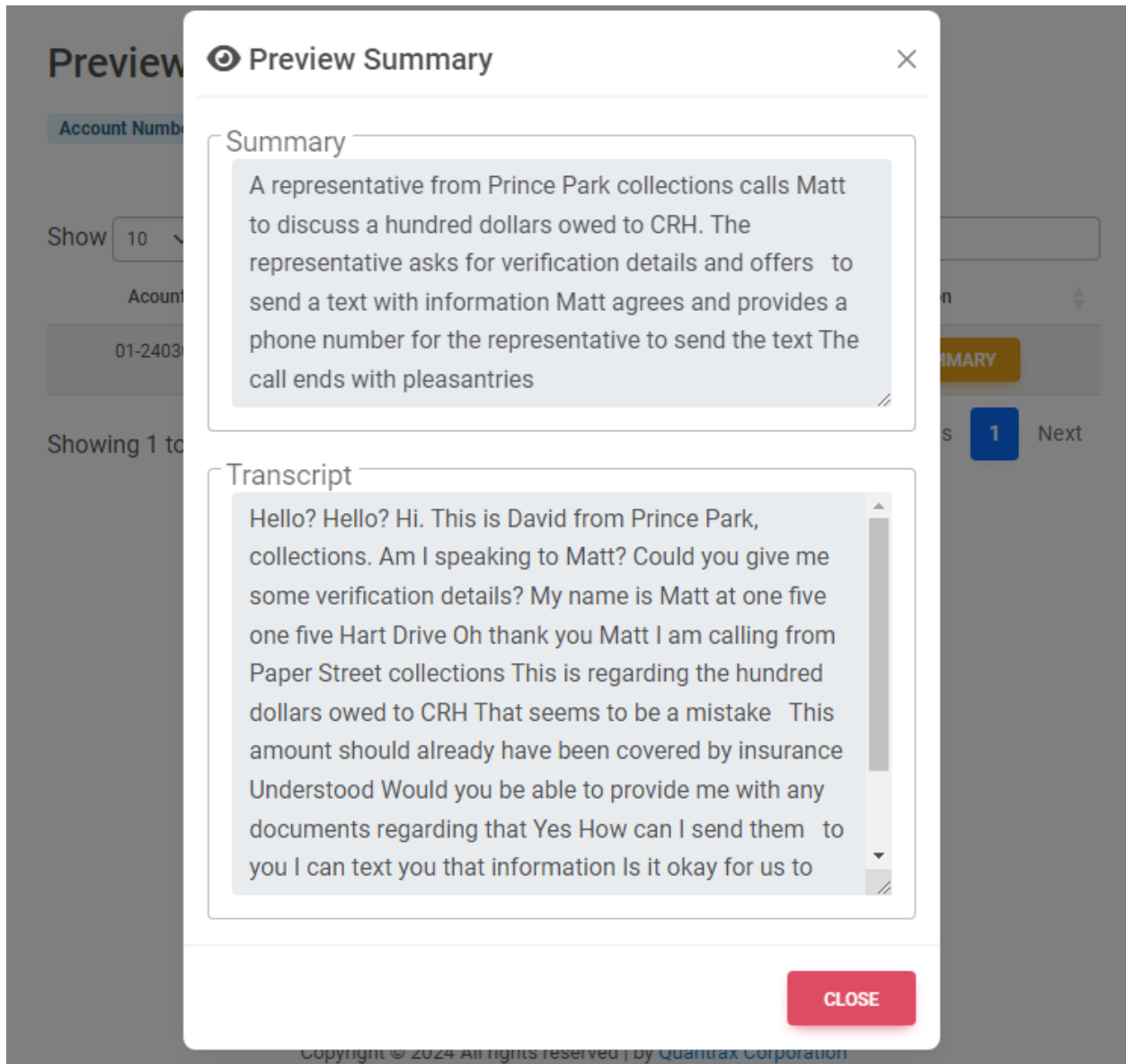
Show  entries Search:

Account No	Date	Time	Action
01-240300004	2024/02/01	02:02:24:AM	<a href="#">VIEW SUMMARY</a>

Showing 1 to 1 of 1 entries Previous **1** Next

The AI also uses the tone of the conversation or details that were said to generate the summary, taking into accounts things such as if the customer seemed confused on the call. The AI is always learning as well. With more use, the better and more accurate the summaries will be.

## Call Summary and Analysis



The image shows a 'Preview Summary' dialog box overlaid on a blurred background of a software interface. The dialog box has a title bar with a close button (X) and a refresh icon. It contains two sections: 'Summary' and 'Transcript'. The 'Summary' section contains a concise summary of a call. The 'Transcript' section contains a verbatim transcript of the call. At the bottom right of the dialog box is a red 'CLOSE' button. The background interface shows a 'Preview' section with an 'Account Number' field, a 'Show' dropdown menu set to '10', and a 'Showing 1 to' indicator. There is also a 'SUMMARY' button and a 'Next' button visible in the background.

**Preview Summary** [X]

**Summary**

A representative from Prince Park collections calls Matt to discuss a hundred dollars owed to CRH. The representative asks for verification details and offers to send a text with information Matt agrees and provides a phone number for the representative to send the text. The call ends with pleasantries.

**Transcript**

Hello? Hello? Hi. This is David from Prince Park, collections. Am I speaking to Matt? Could you give me some verification details? My name is Matt at one five one five Hart Drive. Oh thank you Matt I am calling from Paper Street collections. This is regarding the hundred dollars owed to CRH. That seems to be a mistake. This amount should already have been covered by insurance. Understood. Would you be able to provide me with any documents regarding that? Yes. How can I send them to you? I can text you that information. Is it okay for us to

**CLOSE**

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The agent can view the requested and saved summaries at any point.

This is just one of the many features that Quantrax and RMEX offers to make collections easier. Contact Quantrax for more information and get all the new features set up to use in your company.