
HeedBookDoc Documentation

Выпуск latest

апр. 02, 2018

1	General information	3
1.1	System functions	3
1.1.1	Manager role	3
1.1.2	Employee role	3
1.2	Technical requirements	4
1.3	Safety and data storage	4
2	Getting started	5
2.1	User access	5
2.1.1	Manager role	5
2.1.2	Employee role	5
2.2	Registration and account creation	5
2.2.1	Manager role	5
2.2.2	Employee role	7
2.3	Log in	8
3	System usage (Manager)	11
3.1	Navigation	11
3.2	Employee profile view and creation	12
3.3	Supervising in real time	12
3.4	Information about dialogues	13
3.5	Scripts management	16
3.6	View analytical reports	17
3.6.1	1. Quality of service	17
3.6.2	2. Efficiency	18
3.6.3	3. Text analytics	18
3.6.4	4. Customer profile	18
3.6.5	5. Rating	19
3.7	Account information and password change	19
3.8	Company details and billing	20
3.9	PUSH-notifications	21
4	System usage (Employee)	23
4.1	Navigation	23
4.2	Desktop service	23
4.3	Videoconferencing service	25
4.4	Mobile service	27

4.5	Account information and password change	29
4.6	PUSH-notifications	30

Analyzing the customer's emotions, verbal expressions, the content of the conversation with the employee and other parameters, Heedbook offers a complete range of services to measure overall customer satisfaction with the quality of service. Heedbook processes a video and audio stream from a webcam or a mobile phone of a front-line employee in background mode, analyzes more than 20 various parameters of a dialogue using neural networks and Microsoft services. Information is provided in the context of customers, employees and offices of the company.

1.1 System functions

Heedbook service has the following options:

1.1.1 Manager role

1. Company registration and payment
2. Adding and blocking accounts of company staff
3. Connection to workplaces (supervising customer service in real time)
4. Creating words and phrases (scripts) for frequency of use analysis
5. Receiving PUSH-notification about events on the frontline
6. View reports on dialogues (employee, beginning time, duration, text content, video, integral satisfaction index, mimics analysis, percentage of attention, speech and voice analysis)
7. View reports on company (blocks «Quality of Service», «Efficiency», «Text Analysis») for all dialogues conducted for the selected period up to the level of each employee
8. View employee ratings by the average client satisfaction index, workload, percentage of compliance with scripts
9. View customer profile (by gender and age)

1.1.2 Employee role

1. Selection input video and audio devices
2. Beginning and end of session

1.2 Technical requirements

- Browser Chrome/Firefox/Opera, Internet channel from 0.8 Mb/sec (for Manager and Employee roles)
- Free USB 2.0, webcam with resolution from 640*480 and high-quality audio (for Employee role)

1.3 Safety and data storage

The system uses a cryptographic protocol and safe Microsoft data storage. The information is stored in the Azure BLOB storage: video and audio stream – 1 day, dialogues and photos – unlimited.

2.1 User access

2.1.1 Manager role

Gets access to the system after company account creation and payment.

2.1.2 Employee role

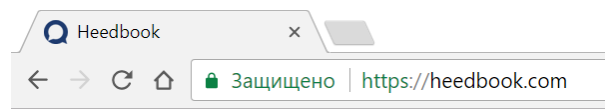
Gets access to the system after account creation by company Manager and receiving an e-mail invitation.

2.2 Registration and account creation

2.2.1 Manager role

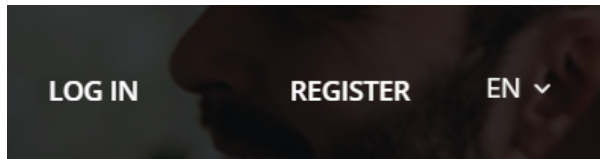
Open the Internet browser and enter the URL [heedbook](https://heedbook.com) in the address bar (picture 1).

Picture 1. Using the browser.



Push the button «Register» on the main page to access the service (picture 2).

Picture 2. Login and registration.



To create an account, enter your name, email, company name, password and its confirmation. Choose country, language for speech recognition, your industry and click «Continue» (picture 3).

Picture 3. Account creation.

The form is titled 'heedbook' with a logo above it. Below the logo is the text 'Please create your account'. The form contains the following fields and controls:

- FullName: Text input field.
- Email: Text input field.
- Password: Text input field.
- Confirm password: Text input field.
- Company name: Text input field.
- Country: Dropdown menu with 'United Kingdom' selected.
- Industry: Dropdown menu with 'Bank' selected.
- Language (speech recognition): Dropdown menu with 'English (US)' selected.
- Continue: A dark blue button.
- Back: A light blue button.

After creating an account, you will be asked to replenish your account. Select required service time and click «Confirm». The minimum amount of replenishment is 300 \$ (picture 4).

Picture 4. Replenishment.


03- Please top up your account





To continue working in the system, top up your account. You pay only hours of work in the system.

Working hours	<input type="text" value="100"/>
Hour price, \$	<input type="text" value="3"/>
Total price, \$	<input type="text" value="300"/>

After you will be redirected to the payment page (picture 5).

Picture 5. Payment.


Тинькофф
 Банк

Amount: 18000,00 ₽

Merchant: Heedbook

Purchase order No.: de68057d-448e-49a7-8f14-b90e4a85f3ff

Secure connection

Card number

Month / Year

CW/CVC

Please enter a valid Card number

☐ I want to receive an email receipt

By providing your email address, you accept the [terms and conditions of the data transfer policy](#)

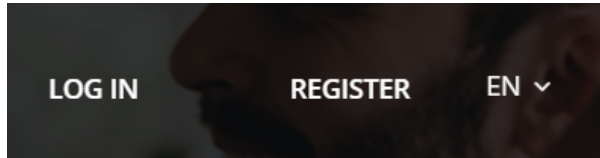
2.2.2 Employee role

Self-registration is not possible. Employee account creation function is available in Manager's personal account in the «Staff» section (see *Employee profile view and creation*).

2.3 Log in

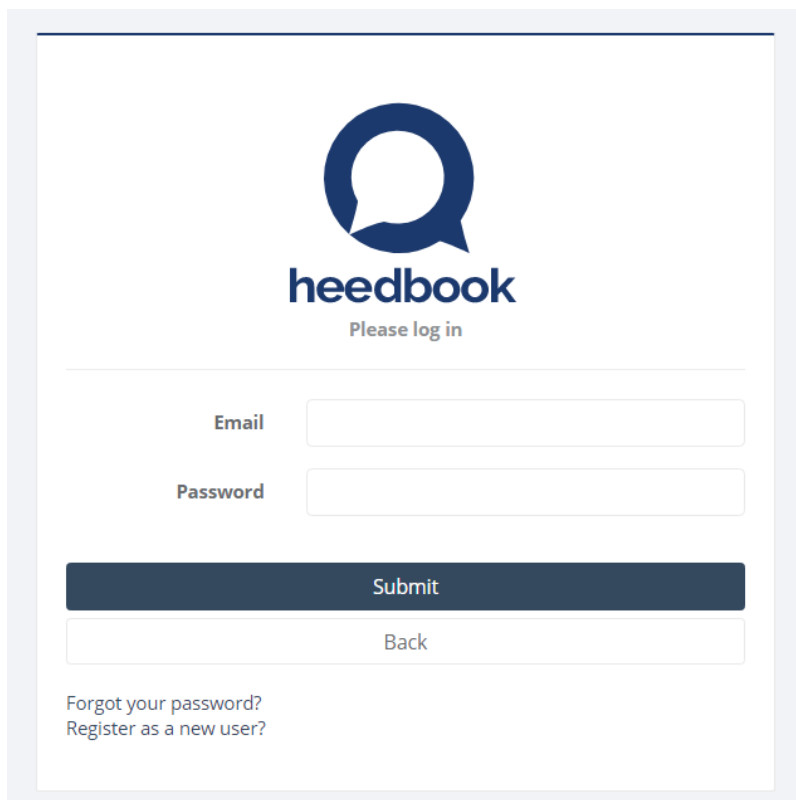
To enter your personal account, click «Log in» on the main page (picture 6).

Picture 6. Login and registration.



To log in, enter your email address and password (specified during registration or recieved by email) and click «Log in» (picture 7).

Picture 7. Login.

The login form is centered on a white background. At the top is the Heedbook logo, which consists of a blue speech bubble icon above the word 'heedbook' in a bold, lowercase sans-serif font. Below the logo is the text 'Please log in'. The form contains two input fields: 'Email' and 'Password', each with a label to its left. Below these fields is a dark blue 'Submit' button. Underneath the button is a light gray 'Back' button. At the bottom of the form, there are two links: 'Forgot your password?' and 'Register as a new user?'.

In case you forgot your password, click on the appropriate link. You will be redirected to the page for resetting your password. Enter email address specified during registration and click «Submit» (picture 8).

You will receive an email with information about your password recovery.

Picture 8. Resetting the password.

Forgot your password?

Please, Enter your email and press Submit button

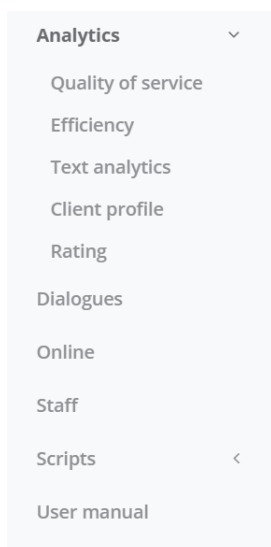
Email

Submit

3.1 Navigation

After login you will be redirected to the personal account. The navigation bar is on the left side of the page (picture 1). By default, you are in the section «Analytics/Quality of service».

Picture 1. Navigation.



To view your and company's profile, use the buttons on the control panel in the upper right corner of the page. You can also change language and log out (picture 2).

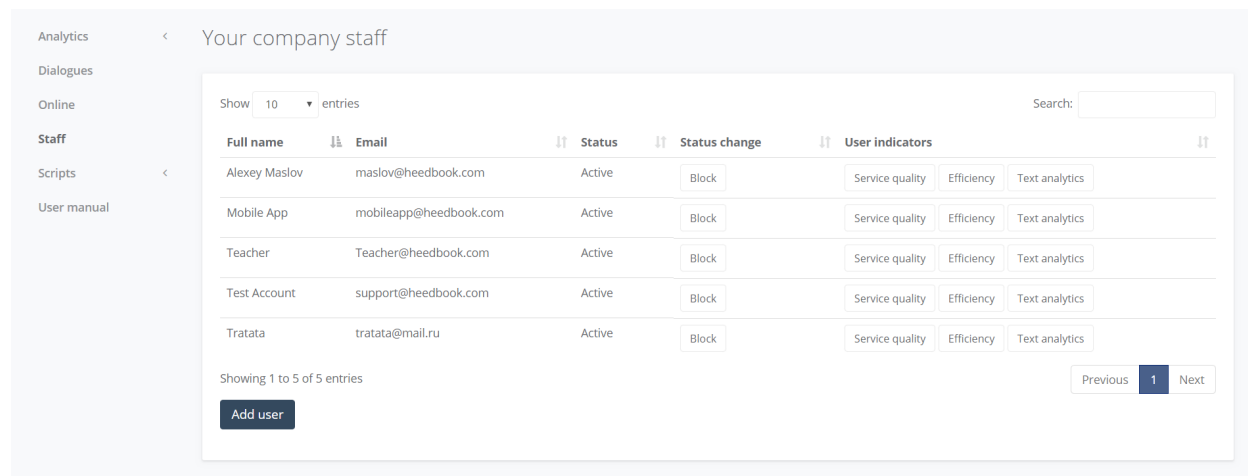
Picture 2. Control panel.



3.2 Employee profile view and creation

To add a new company employee, go to the page «Staff». Here you can see all added employees. Click the buttons to view personal analytics in the following sections: Quality of service, Efficiency and Text analytics (picture 3).

Picture 3. Staff.



To create a new employee account, click «Add user». In the pop-up window enter email, name, his/her position and id in your company's system. Enter a new position or select an existing one from the drop-down list. Click «Add and send invitation» (picture 4).

Picture 4. Creating an employee account.

Add user
Please enter user email and full name

Email

Full name

Employee id

Worker type

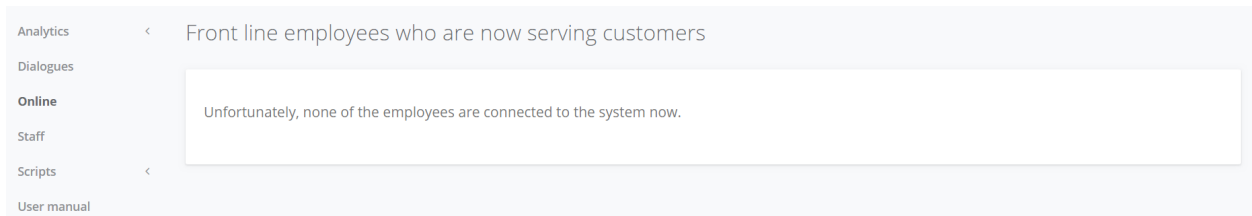
The employee will receive an email with confirmation of registration and password to enter the personal account. To get started, employee must log in (see *Log in*).

For blocking the employee click «Block» opposite the name on the page Staff» (picture 3). After that, access to the service will be denied for this employee.

3.3 Supervising in real time

On the page «Online» you can connect to any workplace on the frontline. To start supervising customer service click Play (picture 5). Please note that an employee should start video and audio stream at the beginning of working day (see *Desktop service*).

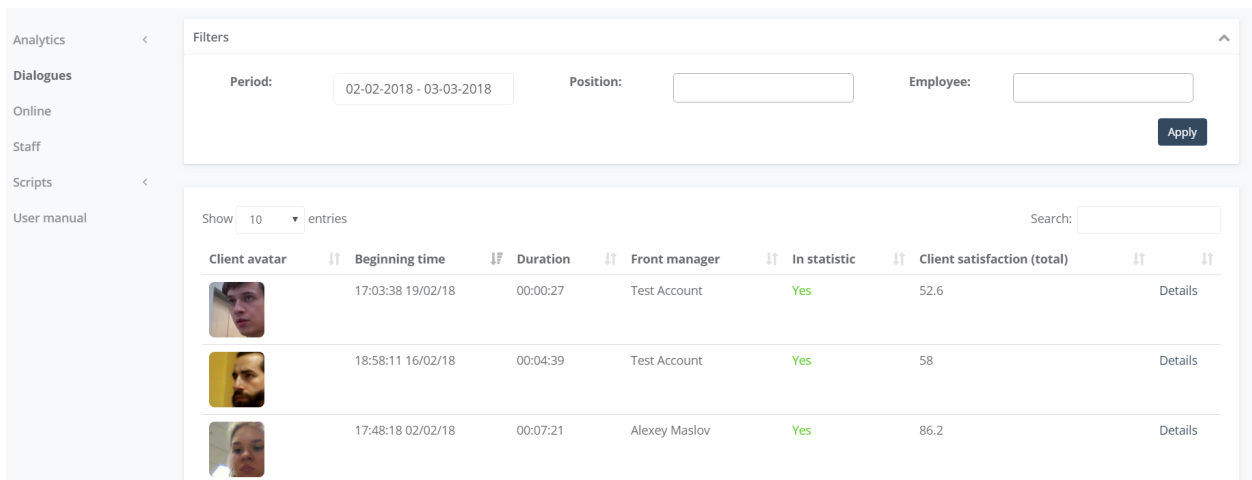
Picture 5. Connection to workplace.



3.4 Information about dialogues

On the page «Dialogues» you can view list of all recorded dialogues with clients (picture 6). You can apply table sorting by beginning time, duration, employees and the integral customer satisfaction index. Also you can customize table using appropriate options (date, employee's position or name) at the top of the page.

Picture 6. Dialogues.




Click «Details» to see more information about dialogue.

The section «**Dialogue details**» (picture 7) represents the following information: front manager, beginning time, duration of dialogue (and percentage of average dialog duration in company), gender and estimated age of client, integral satisfaction index, assessment of client's mood (and it's change), employee self-evaluation (carried out by PUSH-notifications).

Picture 7. Dialogue.

Dialogue details

Front manager Alexey Maslov	Beginning time 16:42:04 02.02.2018	Duration 00:13:57 (101%)
---------------------------------------	--	------------------------------------



female, 18

84.6%
Integral satisfaction index

Negative ↑
client happiness
No data
employee self-evaluation

Dialogue in statistic

You can click on the corresponding button in order to exclude dialog from statistics. Dialogue will not be considered in your company's reports.

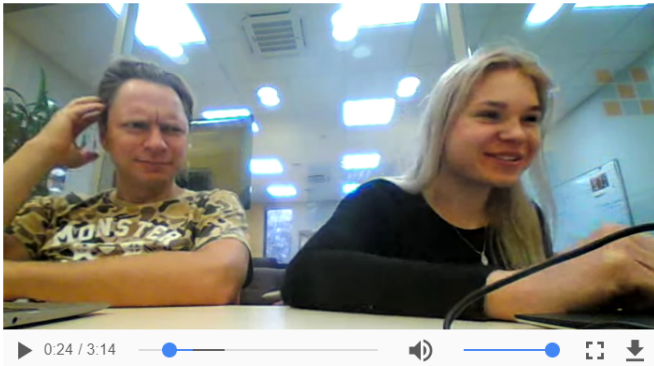
The integral satisfaction index shows if customer service has met or exceeded expectations:

- less than 50 % – Completely does not meet expectations
- 50-70 % – Partly meets expectations
- 70-90 % – Completely meets expectations
- more than 90 % – Exceeds expectations

Video and text content of dialogue are presented on the right side of the page (picture 8). If you click on a certain word, you will see the moment when it was uttered on the video.

Picture 8. Video and text of the dialogue.

Dialogue video



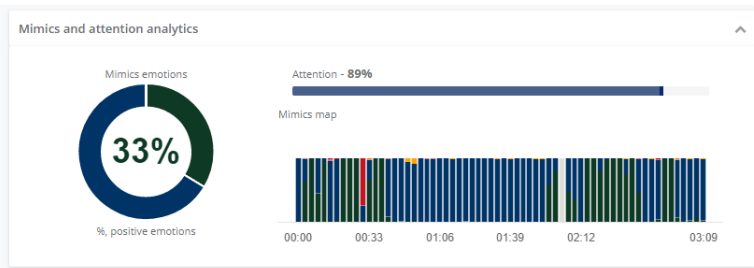
Dialogue content

Detailed information about dialogue is presented in the following blocks: «Mimics and attention analytics» (picture 9), «Voice analytics» (picture 10) and «Speech analytics» (picture 11).

Mimics map in the block «**Mimics and attention analytics**» displays client's emotional distribution for each 3-second interval of dialogue. Click on the time interval in order to watch the corresponding moment on the video of dialogue.

Pie chart shows client's emotional distribution in whole dialogue. The client's attention to dialogue is measured on one hundred-point scale. It is determined by angles of head and eye movement traces.

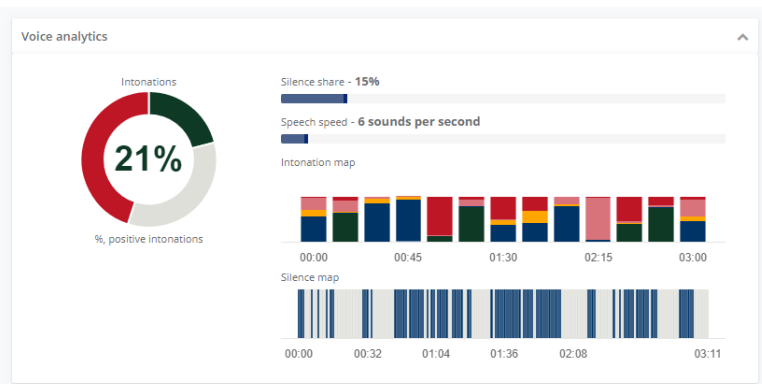
Picture 9. Mimics and attention.



The block «**Voice analytics**» provides information about speed of speech and share of silence from dialogue duration. Intonations distribution for whole dialogue is presented on the pie chart.

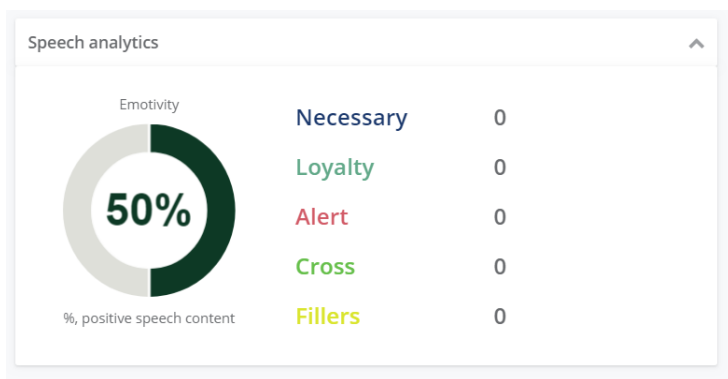
Intonations map shows client's intonations with an accuracy of 15 seconds. Silence map shows presence and absence of speech for each 1-second interval. Click on the time interval in order to watch the corresponding moment in the video of dialogue.

Picture 10. Voice.



Use of the necessary, loyalty, alert, cross-selling and filler words and phrases is represented in the block «**Speech analytics**», in accordance with your company's scripts (see [Scripts management](#)).

Picture 11. Speech.



3.5 Scripts management

On the page «Company scripts» you can see list of all phrases analyzed by the service (picture 12). By clicking on the buttons, you can delete phrases or add new phrases from the library (automatically generated according to the type of your company).

Picture 12. Company scripts.

Company scripts

Show 10 entries

Search:

<input type="checkbox"/>	Script phrase name	Script phrase type	Synonym accept	Word space
<input type="checkbox"/>	Thank you	Necessary	No	3
<input type="checkbox"/>	Let me know if you need something	Loyalty	No	5
<input type="checkbox"/>	Not my problem	Alert	No	2

Showing 1 to 3 of 3 entries

Previous 1 Next

Add new phrase Add phrase from library Delete phrases

To create a new phrase, click the button. Enter phrase text and type, determine allowed number of words between parts of phrase (if it comprises several words), note if you need to use synonyms (picture13).

If you choose parameter «Phrase employee», the system wouldn't analyze use of this phrase by clients. This function is available for work with two microphones, see [Desktop service](#).

Types of phrases:

- Necessary (Good day, Thank you, etc.);
- Loyalty (Nice to meet you, I'll let you know, etc.);
- Alert (Shit, Not my problem, etc.);
- Cross (Discount, Credit card, etc.);
- Fillers (Um, Uh, Okay, etc.).

Click «Submit» to save changes.

Picture 13. Phrase creation.

Phrase information

Phrase text

Phrase type Necessary ▼

Phrase employee ☐

Words space

Synonyms allow ☐

Submit Back

3.6 View analytical reports

In the «Analytics» tab you can set the required period and configure filters by employee type and name. Select parameters you need in the block «Filters» at the top of the page (picture 14).

Picture 14. Filters.

Filters

Period: 25-02-2018 - 03-03-2018 Position: Employee Employee: Teacher

Apply

To select the type of report, use the navigation bar on the left side of the page.

3.6.1 1. Quality of service

The page includes the following indicators:

- total number of dialogues with clients
- average clients“ attention to the dialogue
- average integral satisfaction index
- average percentage of positive and negative clients“ emotions.

The list of top 10 employees by the integral client satisfaction index is presented at the right part of the page. To see scores of all employees, click «Details» (see [5. Rating](#)).

The graph «Client satisfaction level» shows change of the average client satisfaction index for selected period (with an accuracy of 1 day). Changes of positive and negative emotions of clients are presented on the graph «Client emotions» (with an accuracy of 1 day).

3.6.2 2. Efficiency

The page includes the following indicators:

- number of dialogues
- average number of dialogues per company per 1 day
- average number of dialogues per employee per 1 day
- share of dialogues from working time
- share of maximum and minimum loads
- average/maximum/minimum dialogue duration
- average time between dialogues

On the right side of the page is the table «Employees efficiency» containing the following indicators (within an employee): working time, dialogue time, average load, number of dialogues and average dialogue duration.

The bar chart «Popular times» shows average number of dialogues for the selected period which were active during the time interval (with an accuracy of 1 hour).

The bar chart «Clients work load» shows ratio of number of dialogues which were active during the time interval to number of active sessions for selected period (with an accuracy of 1 hour). The graph representing the integral client satisfaction index movement for selected period is imposed on the bar chart.

To change a time scale on charts «Popular times» and «Clients work load», use zoom button at the right part of the chart (1H - with an accuracy of 1 hour, 1D - with an accuracy of day of the week).

3.6.3 3. Text analytics

The page includes the following indicators:

- percentage of dialogues in which at least one phrase of each type was pronounced by employees (Necessary/ Loyalty/ Alert/ Cross/ Fillers)
- percentage of dialogues in which at least one phrase of each type was pronounced by clients (Loyalty/ Alert)

Shares of dialogues in which phrases of different types were pronounced by employees are presented on the chart «Types of phrases in dialogues».

See details about types of phrases and creation of new phrases for your company's scripts analysis on the page [Scripts management](#).

The table «Phrases usage in dialogues» contains detailed information about use of each phrase from your company's script. You can apply table sorting by type of phrase and share of dialogues in which it was pronounced at least once. Each line of the table indicates leader among company's employees by the frequency of use.

Visual distribution of use of phrases in dialogues (by column Share of dialogues) is presented at the block «Most frequent phrases».

At the bottom of the page are ratings of employees by use of cross-selling and prohibited phrases.

3.6.4 4. Customer profile

On this page the following indicators are presented:

- total number of customers

- number of men and women among customers
- average age of men and women among customers

The chart (picture 21) shows distribution of customers by 4 age groups.

Picture 21. Customer profile.



3.6.5 5. Rating

The report «Rating» is presented as table with names of employees and numbers of dialogues (picture 22). Employees are rated by the integral customer satisfaction index.

Picture 22. Rating.

Show	10	▼ entries	Search:	<input type="text"/>
Rating number	Full name	Client satisfaction	Client served	
1	Test Account	55	2	
2	Alexey Maslov	48	34	
Showing 1 to 2 of 2 entries				
		Previous 1 Next		

Detailed reports on each employee of your company are available on the page «Staff» (see [Employee profile view and creation](#)).

3.7 Account information and password change


On the page «Your account information» you can change user name and upload profile picture from your PC. To save changes, click «Save» (picture 23).

In order to change password, enter your current password, then new password and confirmation. Click «Change Password» to save changes.

Picture 23. Account.

Your account information

User profile picture



Выберите файл Ф...

Full Name

Email

Company Name

Old password

New password

Confirm password

Change Password

Save

3.8 Company details and billing

On this page general information about your company is presented. Also, here is amount of paid hours and amount of service hours during the last week (picture 24).

Picture 24. Company details.

My company details

Heedbook
Company name

ru-RU
Speech recognition language

5
Front manager number

Billing

...
hours available

...

...
hours usage this week

Below is list of 100 last sessions started by employees of your company and payments history (picture 25). Please, write us by info@heedbook.com if the amount and/or the status of your payments are incorrect. We will deal with the problem as soon as possible.

Picture 25. Service information.

User sessions (last 100)

Show 10 entries Search:

Front user	Session start time	Session duration
Alexey Maslov	13:40:02 19.02.2018	00:01:20
Alexey Maslov	13:39:29 19.02.2018	00:00:11
Alexey Maslov	13:37:29 19.02.2018	00:01:18
Alexey Maslov	13:36:47 19.02.2018	00:00:45
Alexey Maslov	13:35:40 19.02.2018	00:01:02
Alexey Maslov	13:34:08 19.02.2018	00:01:05
Alexey Maslov	16:27:06 02.02.2018	01:23:02
Alexey Maslov	16:06:09 02.02.2018	22:42:36
Alexey Maslov	16:02:36 02.02.2018	01:53:13
Alexey Maslov	15:51:55 02.02.2018	01:54:05

Showing 1 to 10 of 126 entries Previous 1 2 3 4 5 ... 13 Next

Payment list

Payment date	Payment amount, \$	Time paid, hours	Payment status
11:13:20 16.02.2018	10	100000	Passed
18:12:50 29.11.2017	0	0	In progress

3.9 PUSH-notifications

Важно: Make sure that notifications are allowed for the web page [heedbook](#) . The access control functions are in the browser settings.

Notifications about beginnings of sessions will appear at the bottom right of the screen in the background (in case you has logged in).

4.1 Navigation

After login you will be redirected to your personal account.

To view your profile, use the button on the control panel in the upper right corner of the page. You can also change language and log out (picture 1).

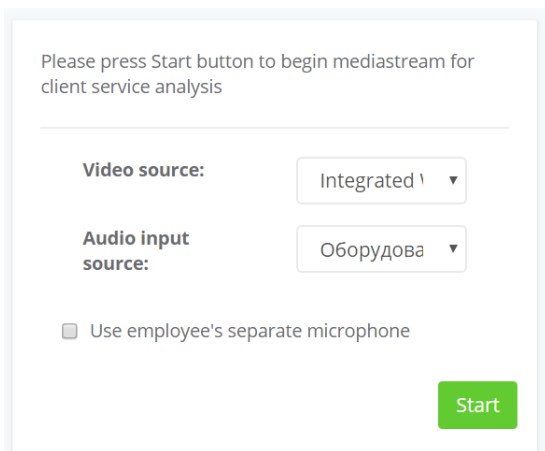
Picture 1. Control panel.



4.2 Desktop service

Connect the webcam via USB. On the right side of the page, select video and audio input devices from drop-down lists (picture 2).

Picture 2. Choice of devices.



Please press Start button to begin mediastream for client service analysis

Video source: Integrated ▾

Audio input source: Оборудова ▾

☐ Use employee's separate microphone

Start

Важно: Make sure that camera and microphone are enabled for the web page.

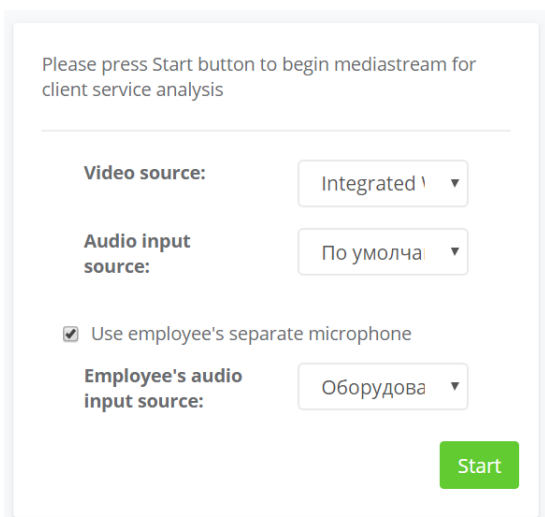
Details about camera and microphone access for different browsers:

- [Google Chrome](#)
- [Opera](#)
- [Mozilla Firefox](#)

If devices are connected correctly and permissions are set up correctly, then you will see image from connected camera on the left side of the page. Make sure the image contains the client's face. If necessary, change the camera position.

To divide a speech of an employee and a client you need to connect an external microphone (via USB). Choose this option and select appropriate audio input device from drop-down list (picture 3).

Picture 3. Choice of microphone.



Please press Start button to begin mediastream for client service analysis

Video source: Integrated ▾

Audio input source: По умолча ▾

☒ Use employee's separate microphone

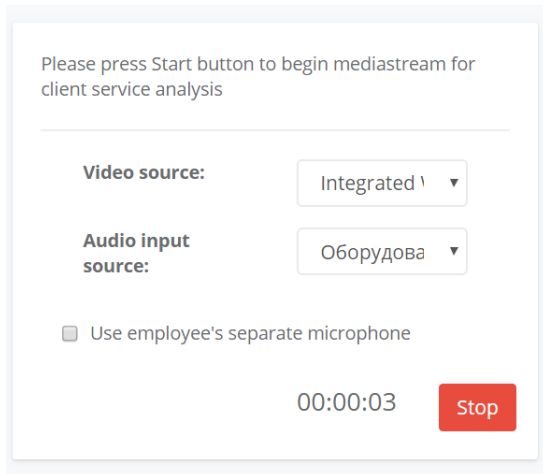
Employee's audio input source: Оборудова ▾

Start

To begin video and audio stream click Start button. You can roll up the browser, the system works in the background.

Total duration of session is displayed at the bottom of the page. To end stream and your work session, push Stop button (picture 4).

Picture 4. End of session.



Please press Start button to begin mediastream for client service analysis

Video source: Integrated \'

Audio input source: Оборудова

☐ Use employee's separate microphone

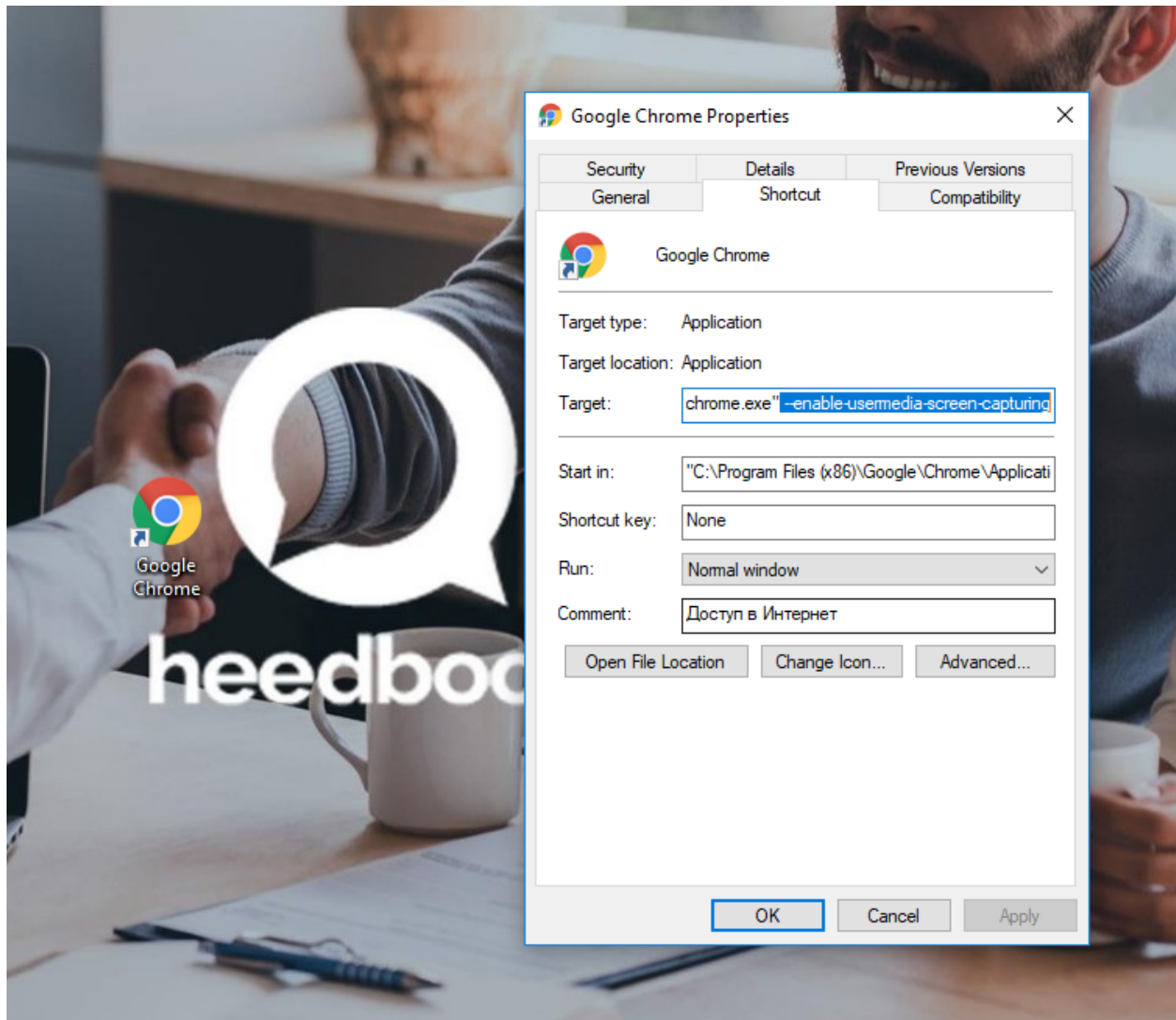
00:00:03 **Stop**

4.3 Videoconferencing service

To use the Heedbook videoconferencing service, follow the next steps:

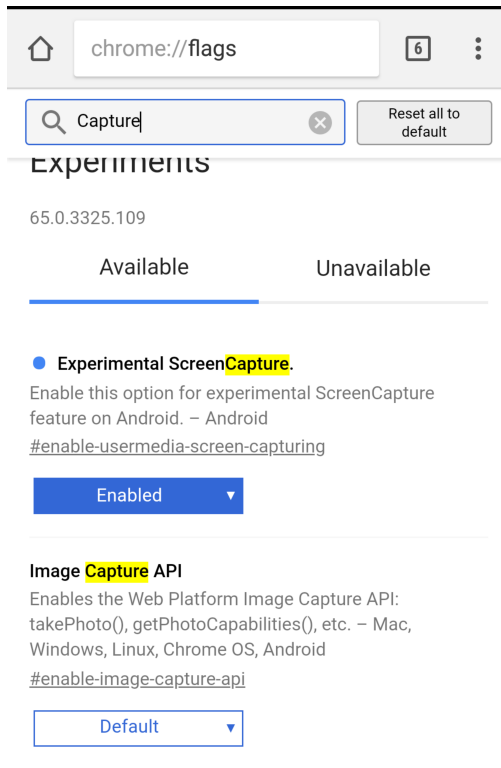
Right-click on your web browser icon (Google Chrome, Opera, Mozilla FireFox) on the desktop. Click «Properties» and open «Shortcut». After tab «-enable-usermedia-screen-capturing» in the field «Target».

Picture 5. Browser.



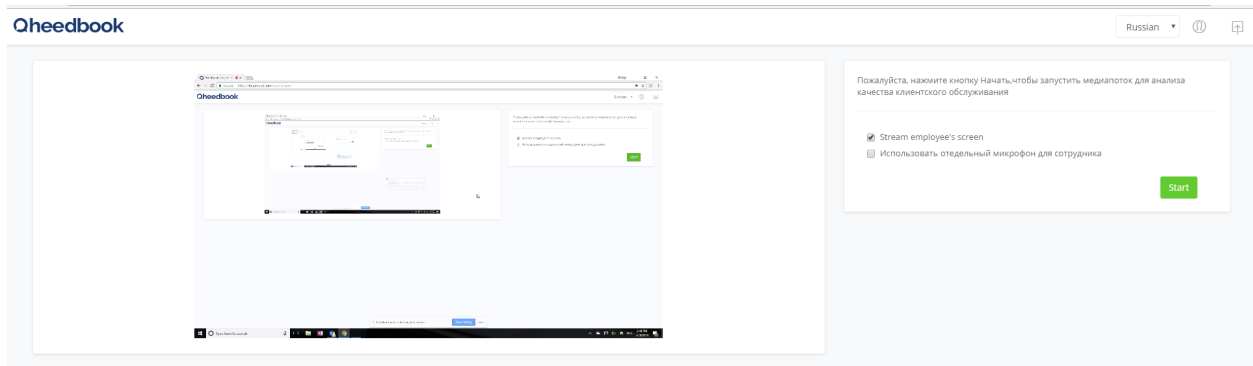
If you use a mobile device, you need to enable screen capture (go to the hidden browser settings). We recommend to use Google Chrome. In the address bar tab `chrome://flags` and select «Enabled» for «Experimental ScreenCapture» parameter (picture 6).

Picture 6. Mobile device.



Log in your [heedbook](#) account. At the right part of the page you need to select parameter «Stream employee's screen» and audio input device (picture 7). Push Start button and roll up the browser.

Picture 7. Choise of parameters.



Launch any videoconferencing service on your PC or mobile device. After the dialog return to the heedbook web page and stop streaming.

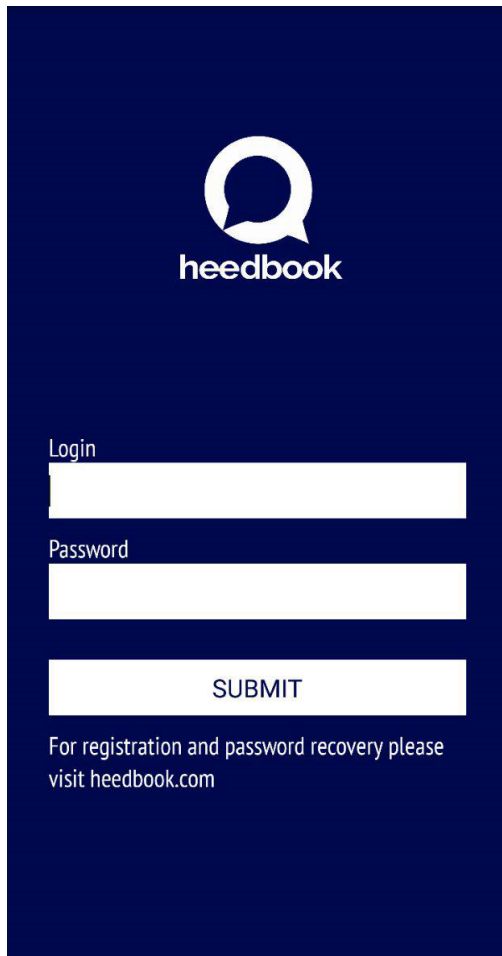
4.4 Mobile service

Download the Heedbook mobile app from the [Google Play catalog](#). Connect any web cam using USB – Micro USB/USB Type-C adapter.

Важно: Make sure that microphone usage, memory usage and notifications are enabled for the app.

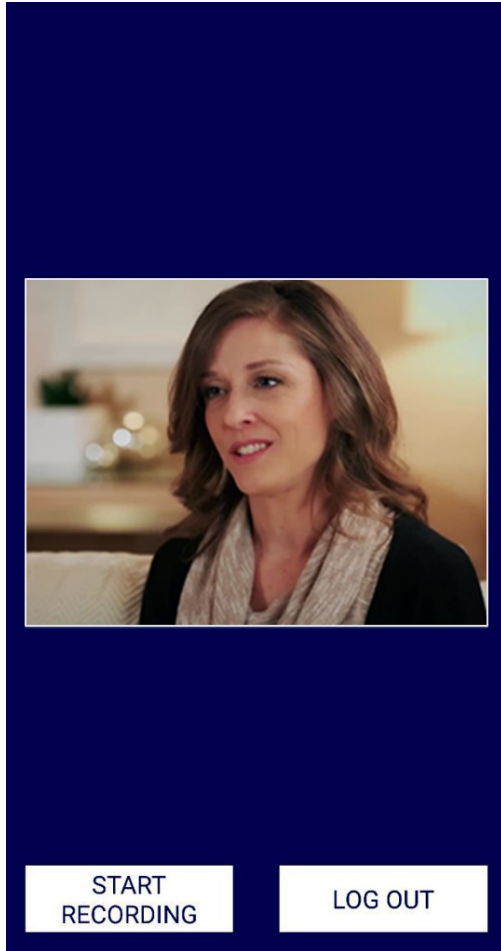
Launch the app, after tab your account info (picture 8).

Picture 8. Parameters.

The image shows a login screen for the Heedbook app. It has a dark blue background. At the top center is the Heedbook logo, which consists of a white speech bubble icon with a 'Q' shape inside, and the word 'heedbook' in white lowercase letters below it. Below the logo, there are two white input fields. The first is labeled 'Login' and the second is labeled 'Password'. Below these fields is a white button with the text 'SUBMIT' in blue uppercase letters. At the bottom, there is a line of white text that reads: 'For registration and password recovery please visit heedbook.com'.

After log in make sure that the image from the camera contains client's face (picture 9). Click «Start recording» to begin video and audio stream.

Picture 9. Launch the session.



You can collapse mobile app, the system works in the background mode. After the work return to the app. Push «Stop recording» and «Log out» buttons to finish your working session.

4.5 Account information and password change


On the page «Your account information» you can change user name and upload profile picture from your PC. To save changes, click «Save» (picture 10).

In order to change password, enter your current password, then new password and confirmation. Click «Change Password» to save changes.

Picture 10. Account.

Your account information

User profile picture



Выберите файл

Файл...ран

Full Name

Test Account

Email

support@heedbook.com

Company Name

Heedbook

Save

Old password

New password

Confirm password

Change Password

4.6 PUSH-notifications

Важно: Make sure that notifications are allowed for the web page [heedbook](#) . The access control functions are in the browser settings.

During the dialogue or after it you will receive notification for customer satisfaction evaluation. Notification will appear at the bottom right of the screen. Click on notification to estimate dialogue.