

## Starting a Beta Trial

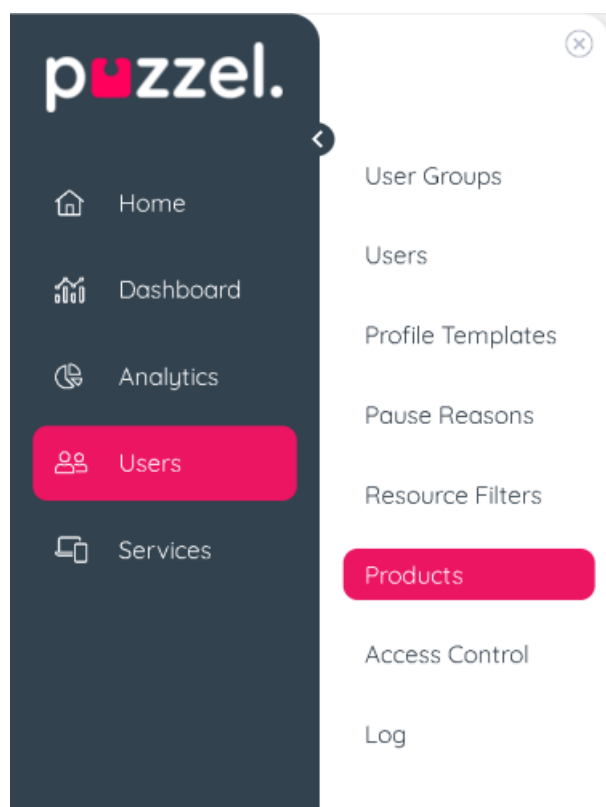
### Note

Please note that Performance Management involves processing of statistical data in Puzzel's authorised sub-processor Microsoft and its cloud infrastructure. Hence you need to make sure that you have read the [information](#) regarding a potential need for an amended Data Processor Agreement (DPA) with Puzzel.

In order to start using Puzzel Performance Management, you will first need to enable the Analytics Menu in the Puzzel Admin Portal.

### Enabling Analytics menu

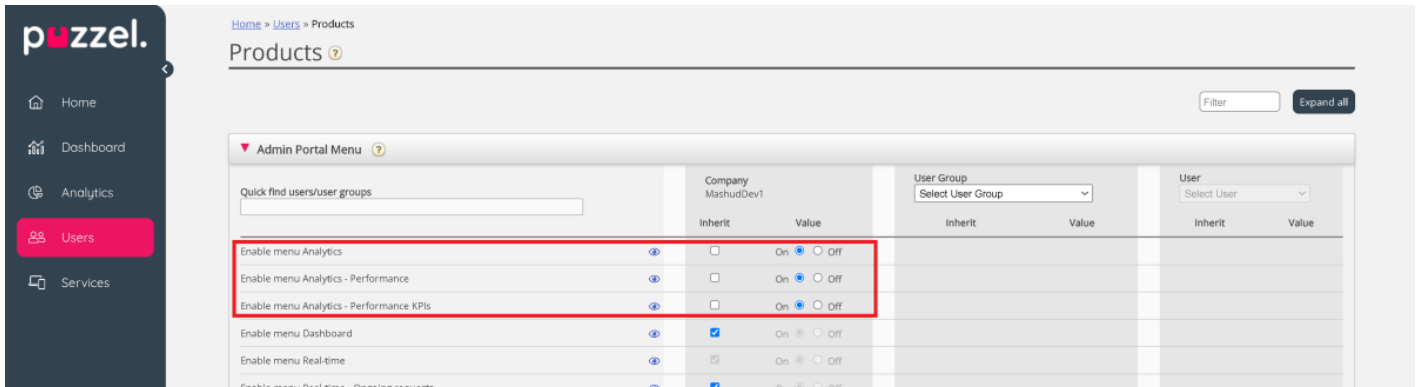
As an admin user with the appropriate privileges in the Puzzel Admin Portal, navigate to the Users Menu and click on the Products Sub Menu as shown below:



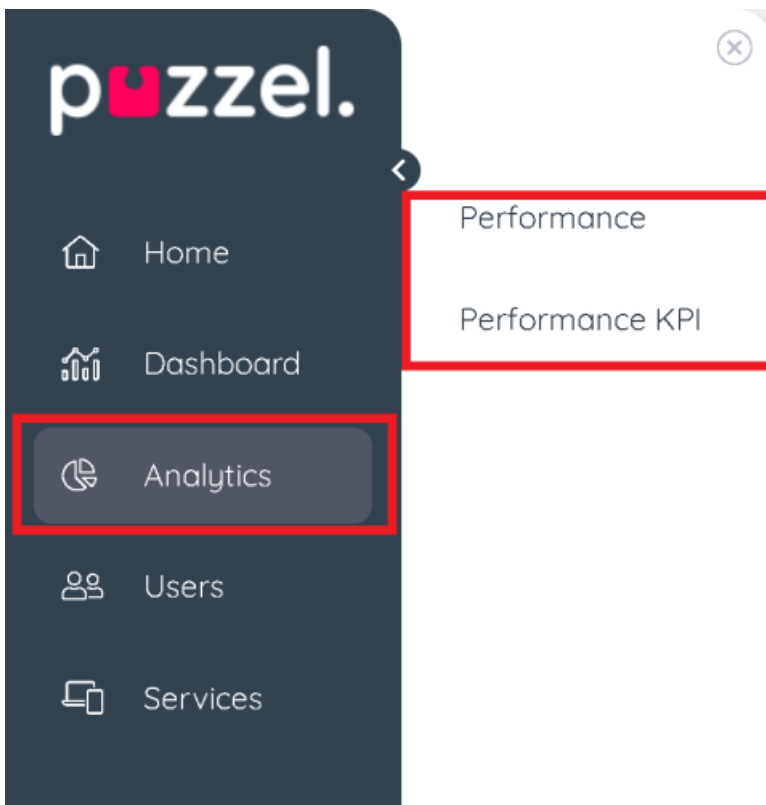
Access to the Analytics Menu can be enabled for your company level, user group level or for specific users from the accordion labelled '**Admin Portal Menu**' as shown below.

The following properties may need to be enabled depending on which user groups or users you wish to grant access to either have visibility, manage performance or both.

- Enable menu Analytics: this makes the Analytics Menu visible
- Enable menu Analytics - Performance: allows viewing of the performance results
- Enable menu Analytics - Performance KPIs: allows access to create and manage KPI configurations and assignment of goals



You will now have access to the Analytics main menu and the respective sub menu as shown below:



## Starting the Free Trial

### Note

We have enabled 'Start 45 days Free Trial' button and can now be used.

To start the beta trial, navigate to Performance KPI or the Performance sub menu item. You will be presented with a landing page and a button to start the 45 days free trial. Clicking on the 'Start 45 days Free Trial' button automatically subscribes your organisation for 45 days and begins loading statistics data for the past 30 days.

This initial process can take 15 - 30 mins depending on the amount of data to be processed. All subsequent data loading and processing happens automatically every 15 minutes.

**Performance Management**  
Create targeted KPIs for all your channels, business queues, agents and user groups and visualise how your contact centre is performing against those targets

- ✓ A standardised framework for tracking and managing all metrics across the whole contact centre
- ✓ Create unlimited targeted KPIs for channels, business queues, agents or user groups
- ✓ Visualise performance and trends over time against your goals
- ✓ Easily identify what you do well and what needs to be improved

[Start 45 days Free Trial](#)

Once the subscription has been setup, you will be presented with a button to configure your first KPI as shown below:

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[Configure First KPI](#)

You can now continue to [creating your KPIs and setting up the goals](#)

### During Trial Period

A small banner will be displayed during your trial period with a reminder of your trial expiration date as shown below:

KPI name	Short name	Based on (KPI)	Modified by	Last modified
<input type="checkbox"/> Bot Survey	bot CSAT	Customer Satisfaction	mashud	18/05/2022
<input type="checkbox"/> Chat AHT	cAHT	Average Handling Time	mashud	11/05/2022
<input type="checkbox"/> Chat Answer Rate	cANS	Answer Rate	James	09/05/2022
<input type="checkbox"/> Chat Survey	cSur	Customer Satisfaction	mashud	18/05/2022

## End of Trial Period

If you have not subscribed to continue using Performance Management before it ends, you will be presented with a message as shown below.



Your free trial has ended.

Contact your account manager to continue using Performance Management.

You can subscribe even after the trial has ended and your KPI configuration data will not be lost.