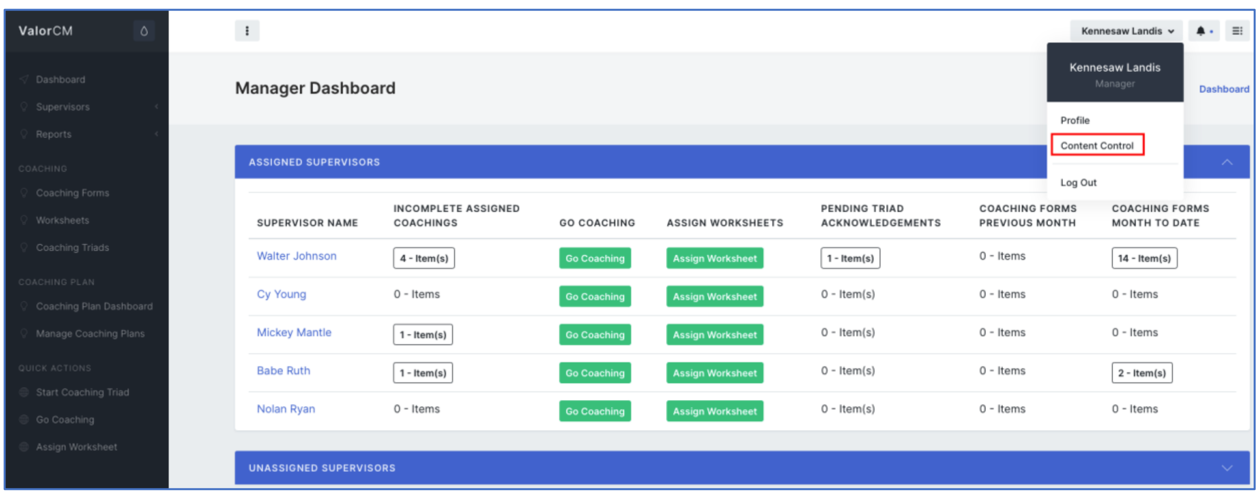
CoachTelesales and CoachCustomerSupport
User Guide - Creating and Editing Content

Managers have the ability to create and edit Modules, Coaching Activities, Coaching Methods and Agent Worksheets. This includes changing or editing activity and worksheet names, worksheet content and activity coaching instructions. Current activities and worksheets can be changed to be inactive or active. Coaching Activity priority rankings can be updated and the timeframe for suggest coaching reset can be lengthened or shortened. Worksheets can be created with text fields that Agents complete as part of independent learning.

Contents:

Create Coaching Activities

1. Select Content Control from the Username drop down menu



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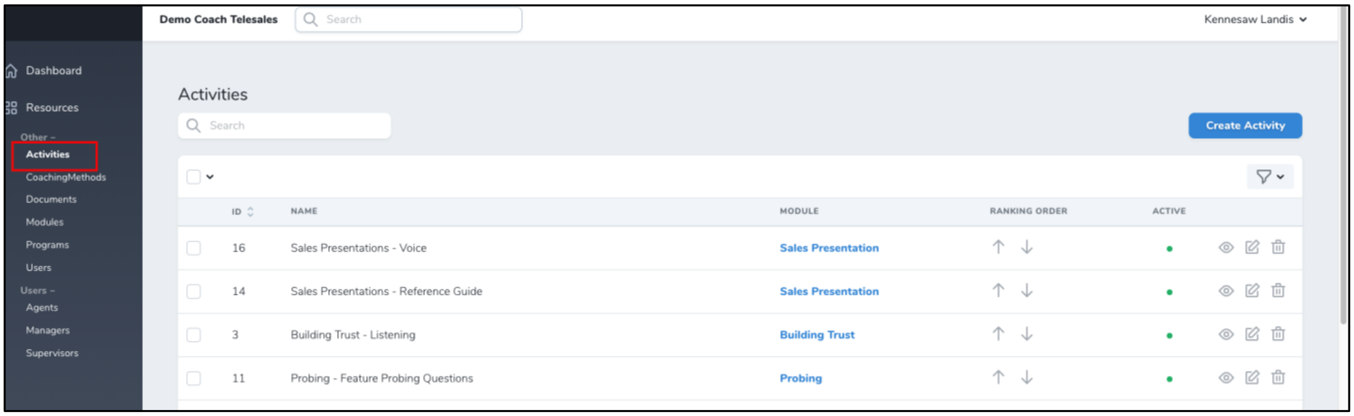
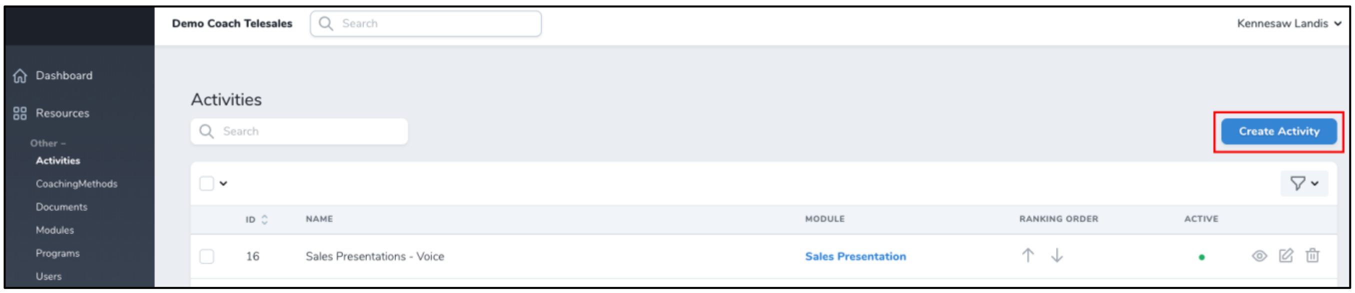
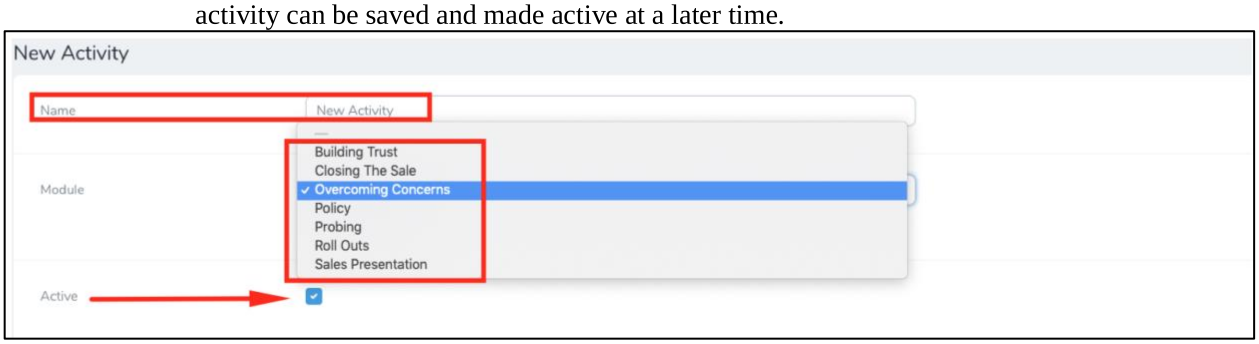
2. Select Activities from the left drop-down menu



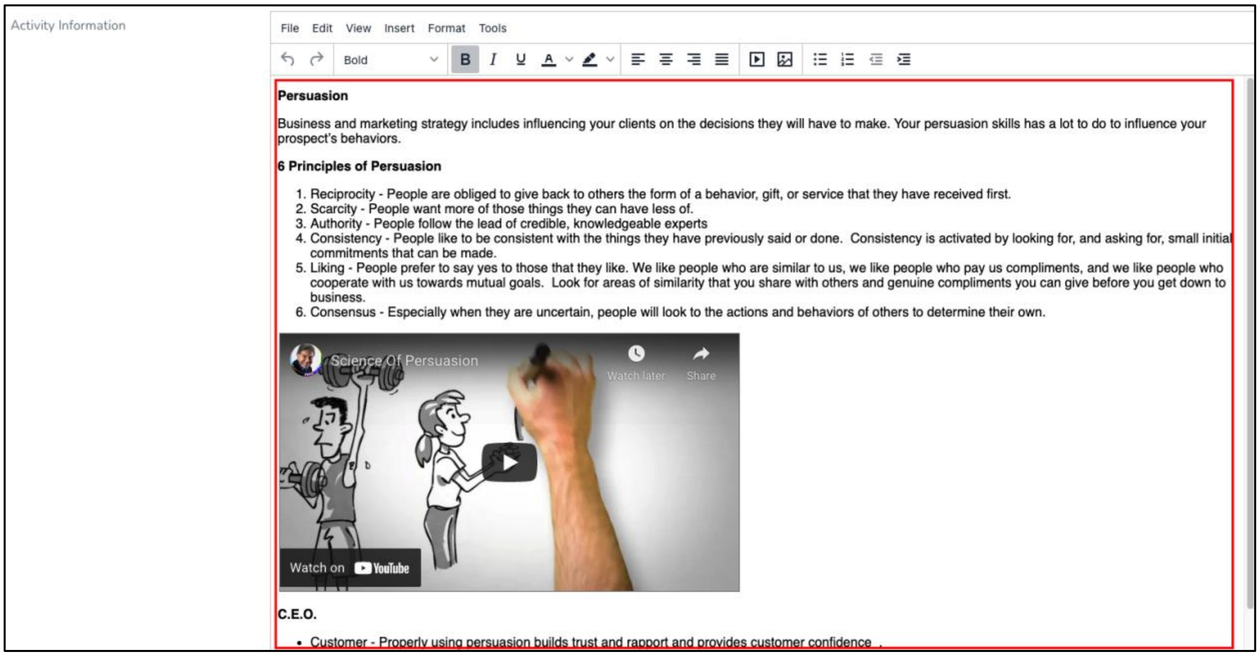
3. Click Create Activity



a. Enter the Name
b. Select the Module from the drop-down menu
c. Click Active (if you would like to have the Activity immediately available for coaching. The activity can be saved and made active at a later time.

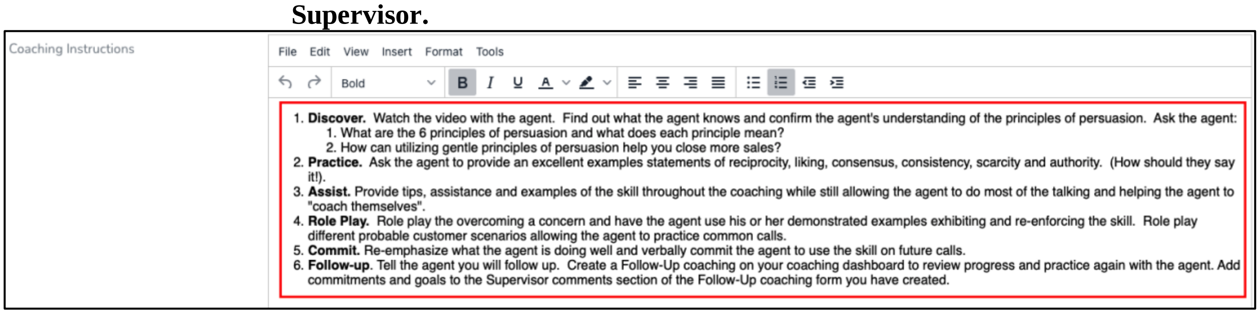


d. Create or write the skill content that you would like the agent to be trained on utilizing in the Activity Information box.
   i. **Content created in the Activity Information box will be visible on the Coaching Form when it is delivered to the agent for Acknowledgement after the coaching is completed.**



e. Create or write the coaching instructions in the Coaching Instructions box (Description).

i. **Content created in the Coaching Instructions box is only visible to the Supervisor.**



Note: You can cut and paste text into the Activity Information or Coaching Instructions box for Activities or for Worksheets. You can also utilize the edit tools

to or insert images, slides, videos or text boxes into worksheets and coaching instructions.

f. Click Create Activity

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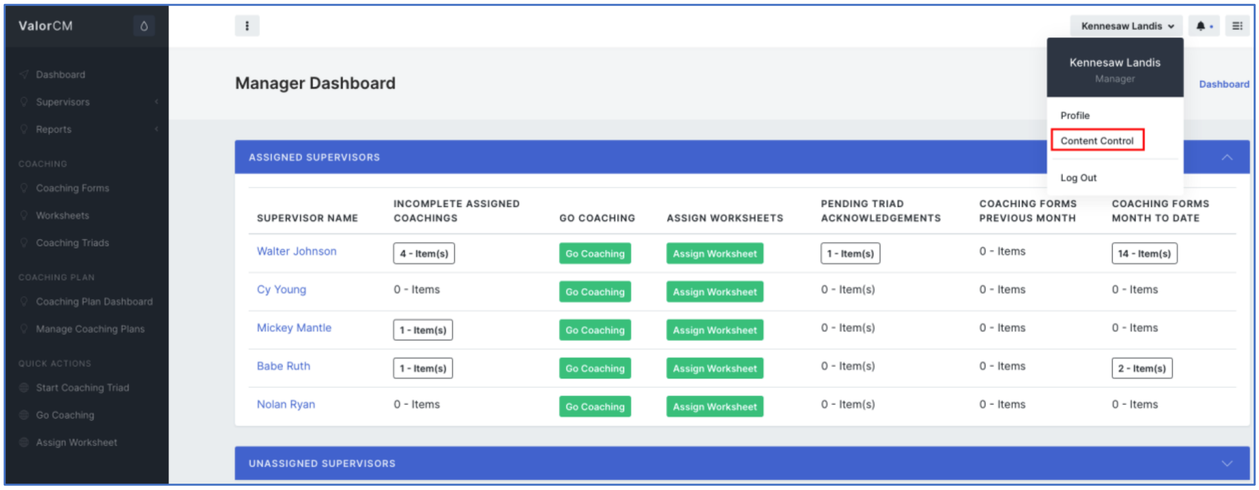
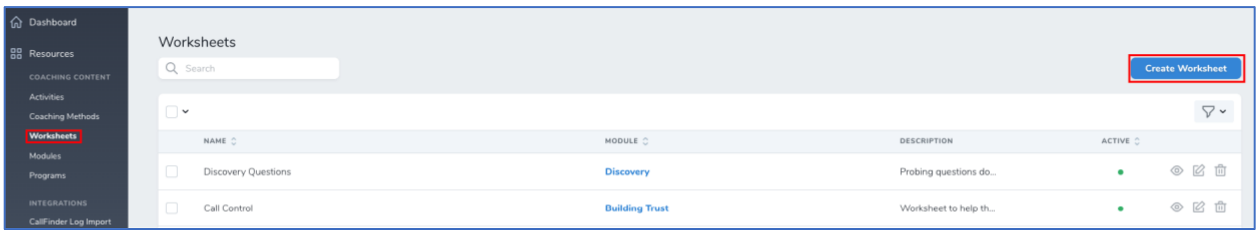
Create Agent Worksheets

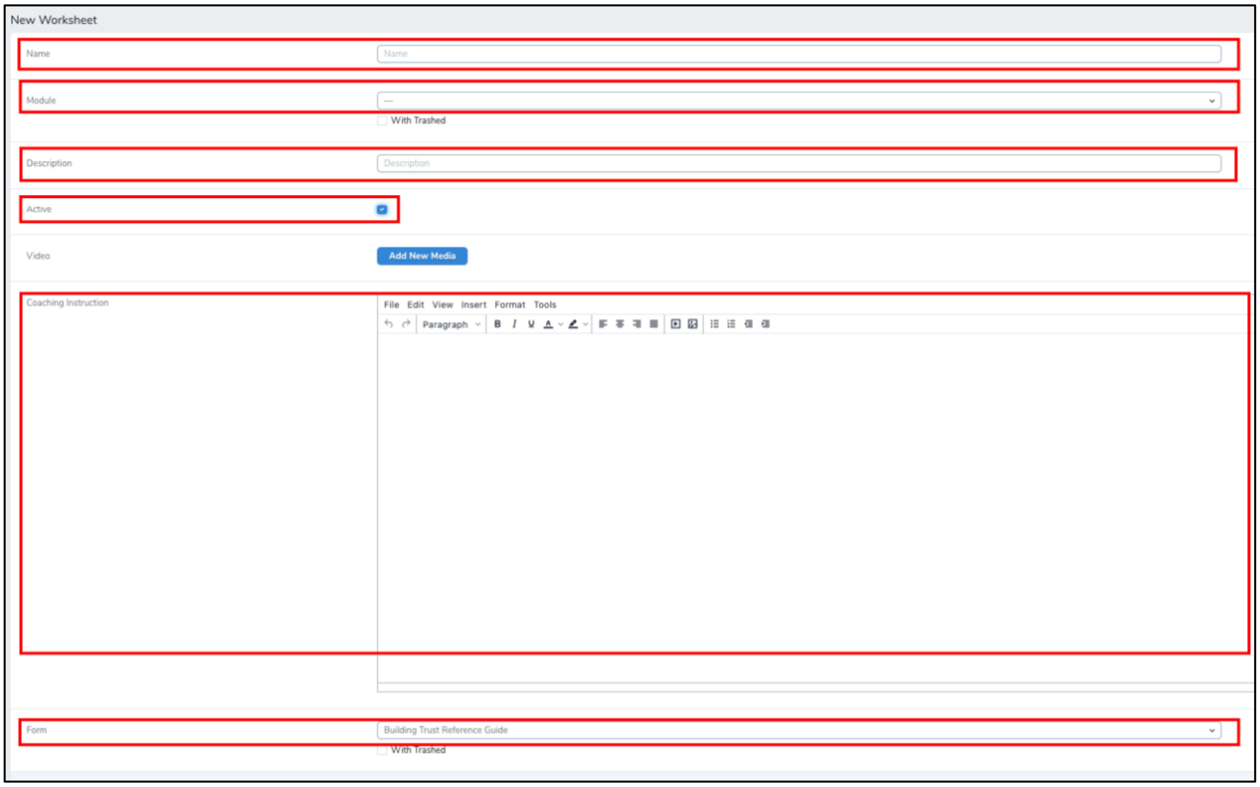
1. Select Content Control from the Username drop down menu



2. Select Worksheets from the left drop-down menu



3. Click Create Worksheet
    a. Enter the Name
    b. Select the Module from the drop-down menu
    c. Enter the Worksheet Description
    d. Click Active (if you would like to have the Worksheet immediately available for coaching. The Worksheet can be saved and made active at a later time.
    e. Create the content of the Worksheet in the Data box area.
    f. Attach a Form to the Worksheet



Note: When editing, you can cut and paste text into the Coaching Instructions box for Activities or the Data box for Worksheets. You can also utilize the edit tools  to or insert images and videos into worksheets and coaching instructions. You can [create Forms or Quizzes] to attach to Worksheets.

g. Click Create Document 

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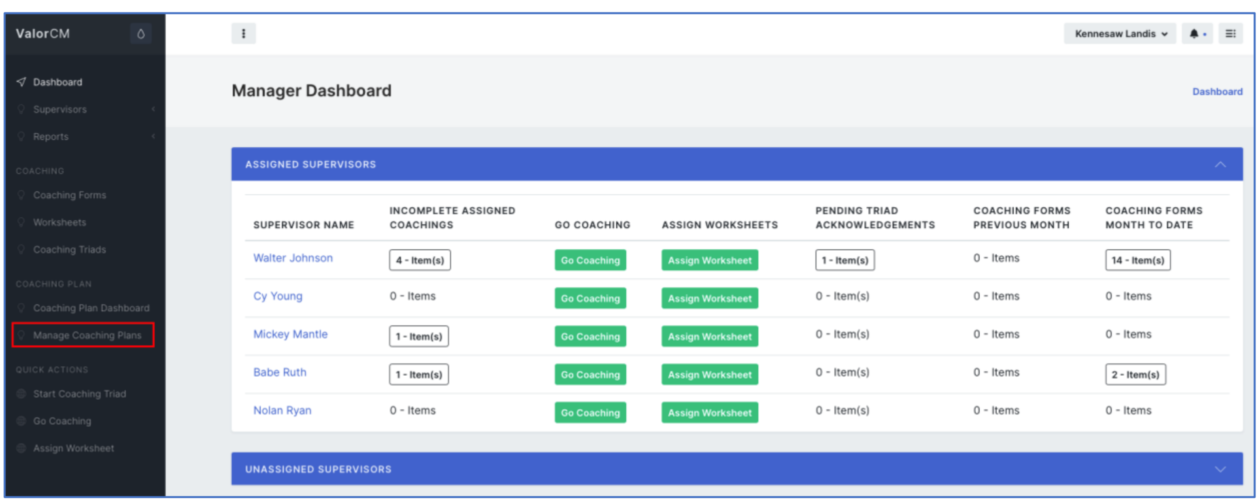
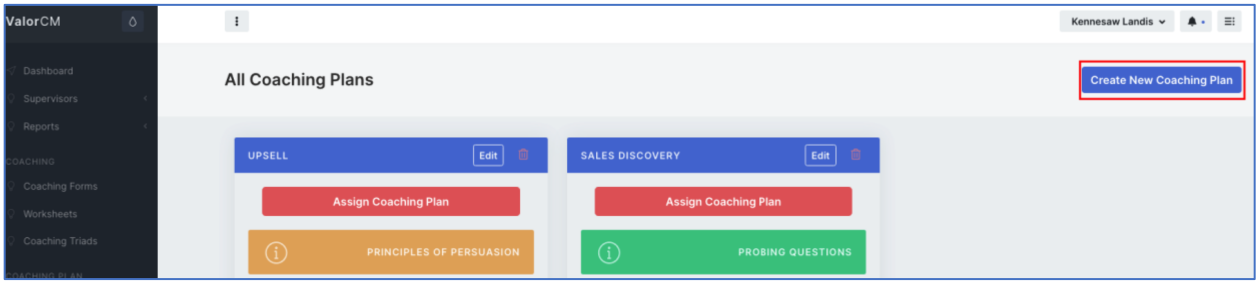
Creating Coaching Plans

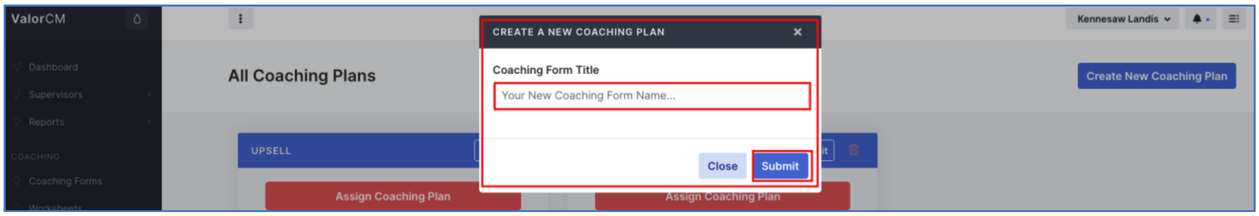
1. Select Manage Coaching Plans from the side bar menu on the Manager Dashboard.



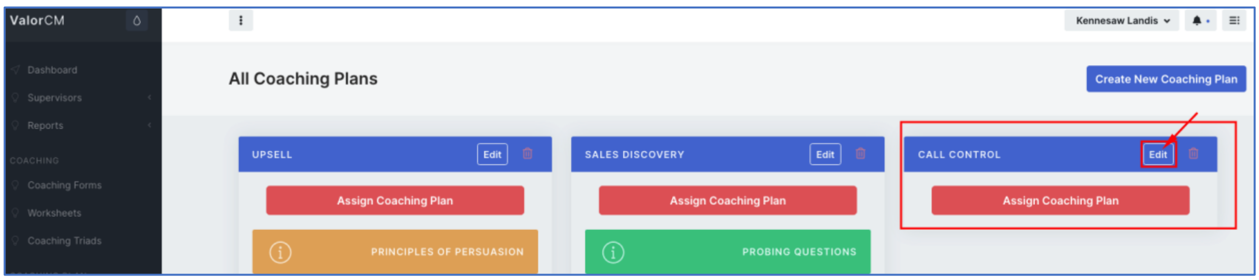
2. Click Create New Coaching Plan



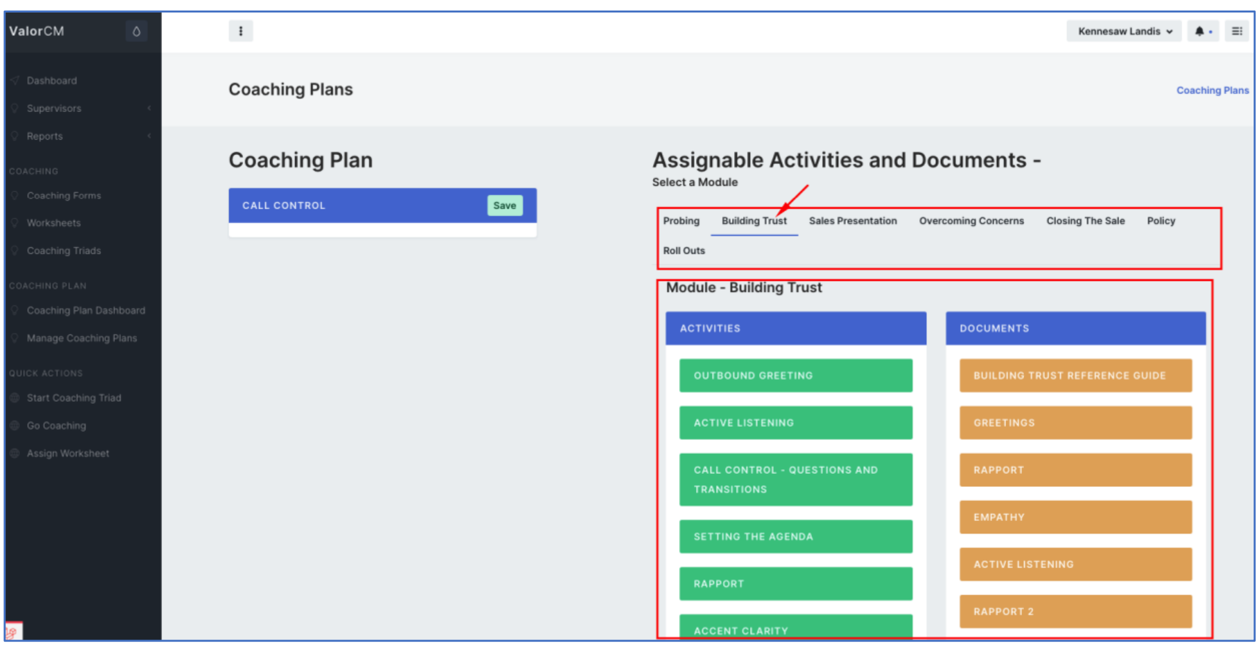
3. Name the Coaching Plan and click Submit.



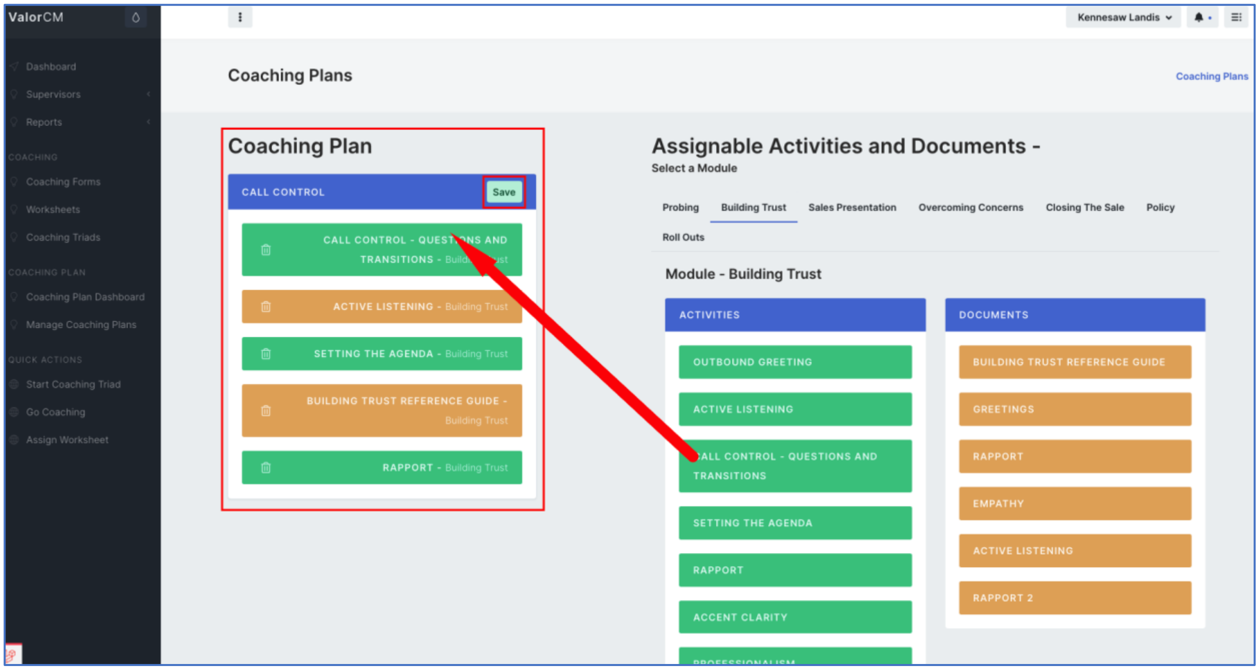
4. Click Edit on your new Coaching Plan.



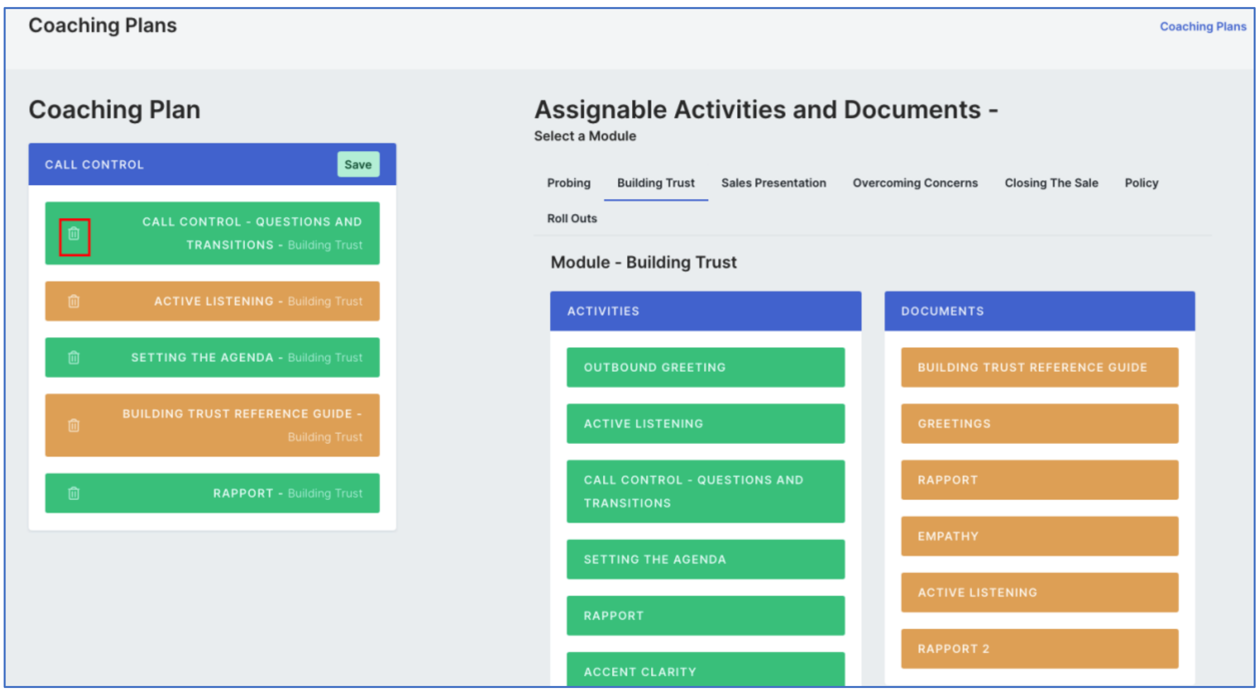
5. Click on each Module to display the available Coaching Activities and Worksheets within that Module that can be added to the Coaching Plan.



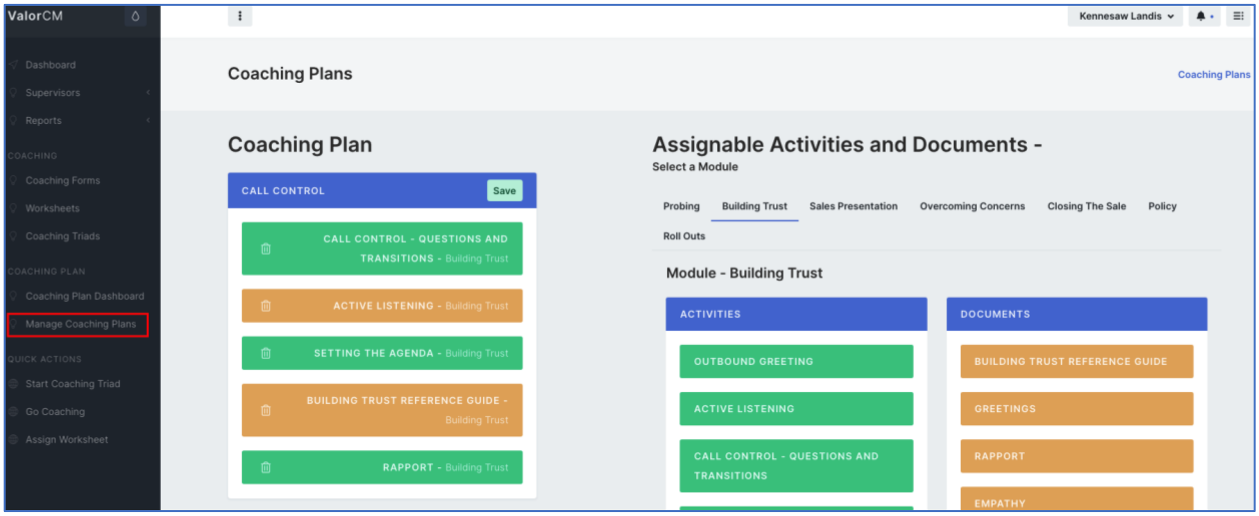
6. Drag and Drop Activities and Worksheets from the Module columns to the Coaching Plan Column.



7. To remove Activities or Worksheets from the Coaching Plan, click the Trash Can icon next to the Activity or Worksheet you would like to remove.



8. After adding or removing the desired Activities and Worksheets, Click Save.
9. Click Manage Coaching Plans to return to the Coaching Plans page and to Assign the new Coaching Plan.



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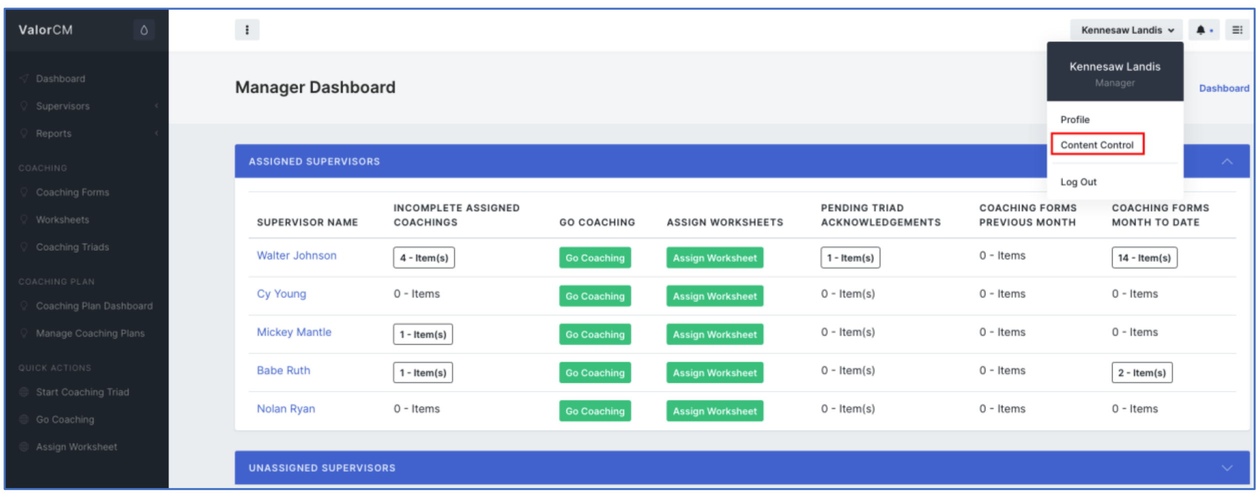
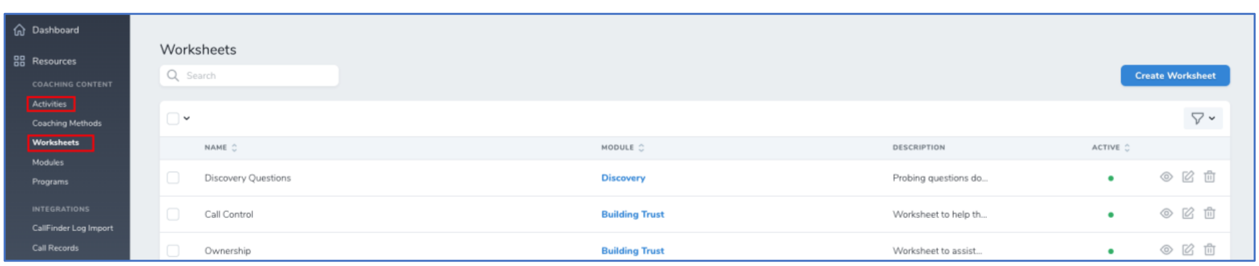
Editing Coaching Activities or Worksheets

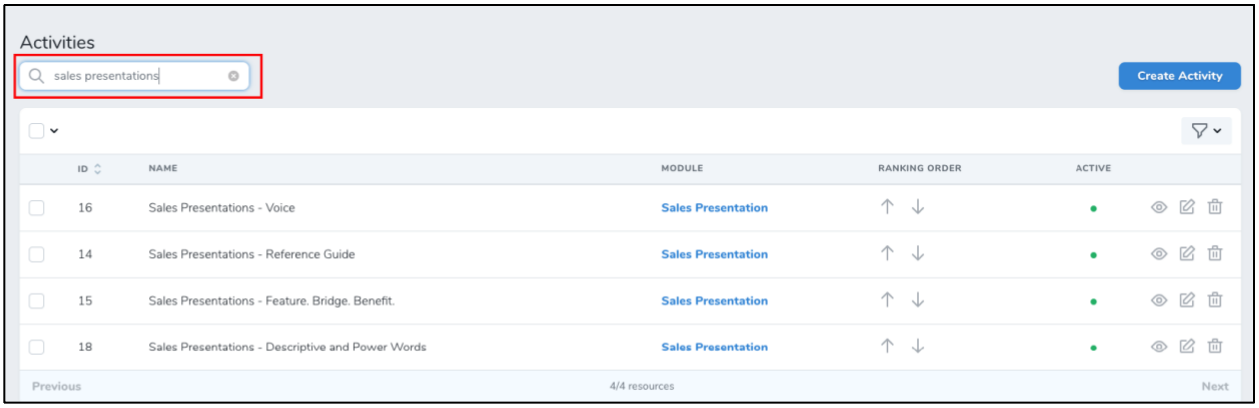
1. Select Content Control from the Username drop down menu



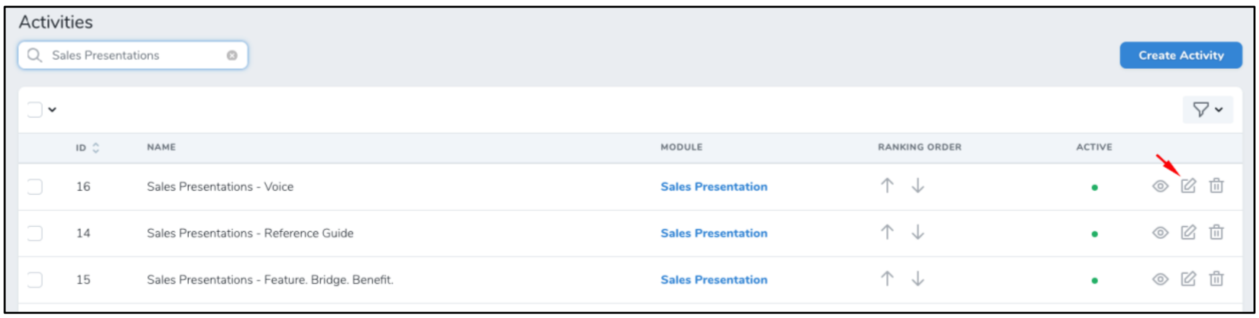
2. Select Activities from the left drop-down menu to edit Coaching Activities or Select Worksheet from the left drop-down menu to edit Worksheets.



3. Locate the Activity or Worksheet you would like to edit. Use the Search bar to filter the list of Activities or Worksheets.

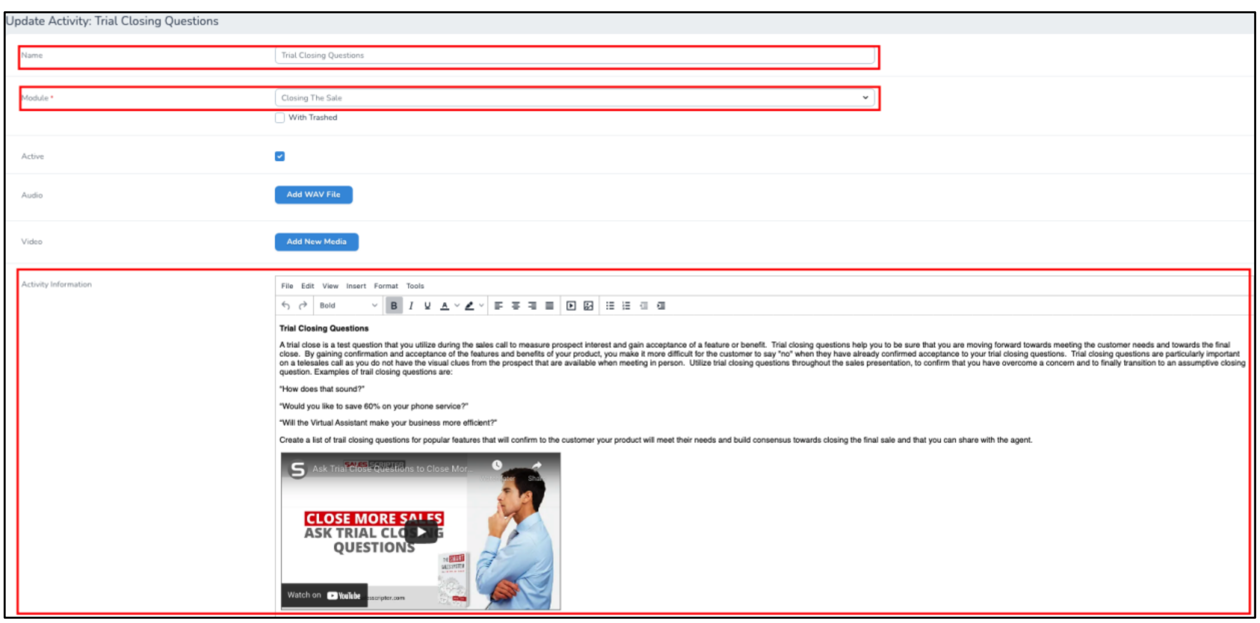


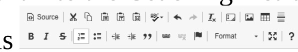
4. Click the Edit icon 



5. Edit the Activity
    a. Activity or Worksheet Name
    b. Module that contains the Activity or Worksheet
    c. Activity Information, Coaching Instructions or Worksheet Data
    d. Save your changes 

or 



Note: When editing, you can cut and paste text into the Coaching Instructions box for Activities for Worksheets. You can also utilize the edit tools  to or insert images and videos into worksheets and coaching instructions. You can create Forms or Quizzes to attach to Worksheets.

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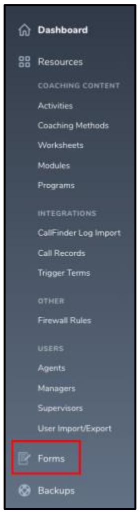
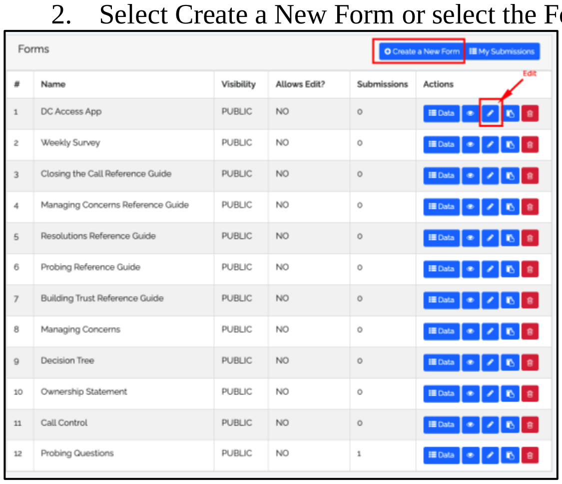
Creating and Editing Forms (Quizzes) for Worksheets

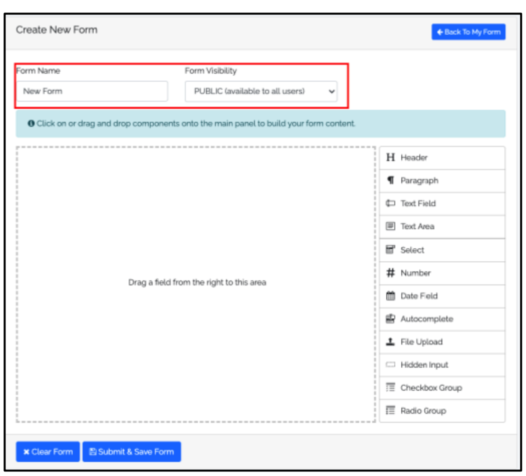
1. In the Admin Dashboard, select Forms from the sidebar menu



2. Select Create a New Form or select the Form you would like to edit.

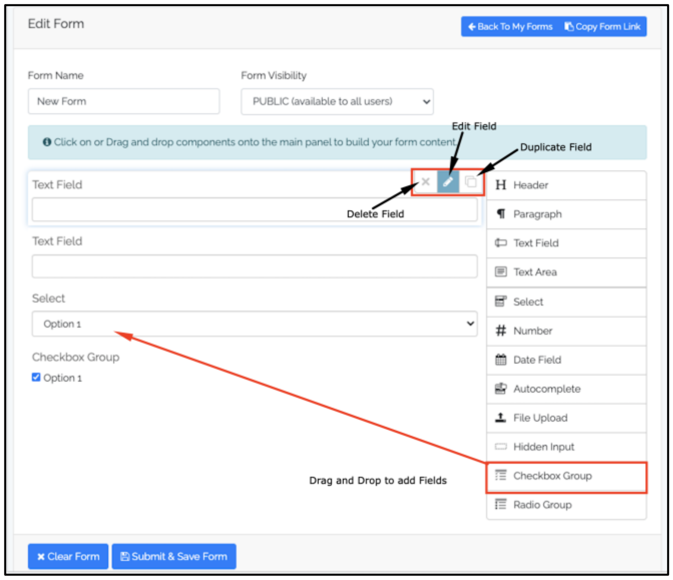


3. For new Forms, enter the Form Name and select Public for the Form Visibility

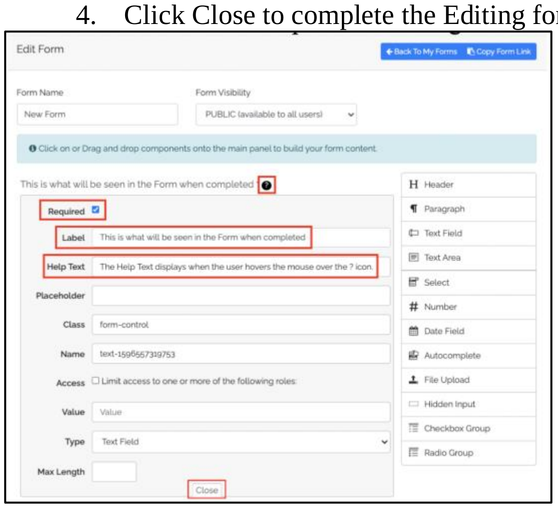


4. Add the fields from the menu that you would like in the Form.
   a. Drag and Drop the field type you would like to add to the Form.

i. Click Edit to add content to the Field.
ii. Click the X to delete an unwanted Field
iii. Click Duplicate Field to create an exact copy of the Field you have created.



b. Edit the Fields you have added.
   i. Text Fields
      1. Select if you would like the Field Required or Not.
      2. The Label is the text that will be displayed on the Form for the end user. This would be where you would type your quiz question.
      3. Enter any Help text or "hint" you would like to display for the end user.
      4. Click Close to complete the Editing for JUST that specific Field.

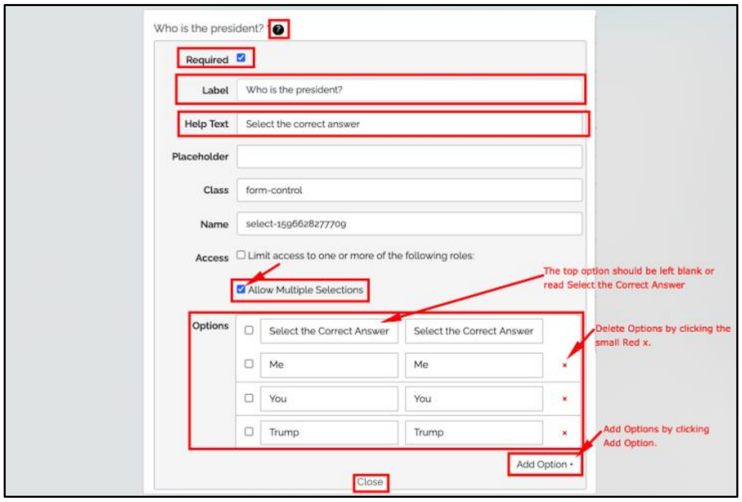


   ii. Select Fields
      1. Select if you would like the Field Required or Not.
      2. The Label is the text that will be displayed on the Form for the end user. This would be where you would type your quiz question.
      3. Enter any Help text or "hint" you would like to display for the end user.
      4. Enter the Options for the end user to select.
         a. Create the number of Options you would like the end user to choose from.
         b. Select Allow Multiple Selections if desired
            i. If Allow Multiple Selections is checked, ALL selections will be visible in the menu at one time to the end user and

they will need to use the control key on the keyboard to select multiple options.

c. Type the text you want for each Option into BOTH columns for each Option.

d. Click Close to complete the Editing for JUST that specific Field.



iii. Checkbox Group and Radio Group Fields

1. Select if you would like the Field Required or Not.
2. The Label is the text that will be displayed on the Form for the end user. This would be where you would type your quiz question.
3. Enter any Help text or "hint" you would like to display for the end user.
4. Enter the Options for the end user to select.

   a. Create the number of Options you would like the end user to choose from.

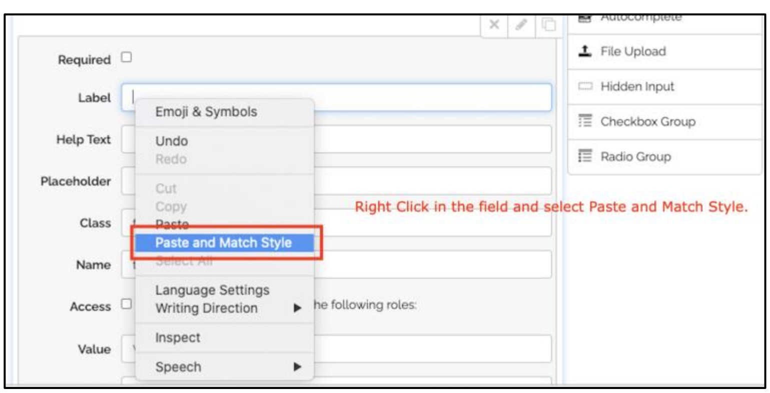
      i. Checkbox Group Fields default to allow for the end user to choose multiple selections.

      ii. Radio Group Fields allow for you to select whether you would like the end user to choose "Other" as the answer and enter text.

   b. Type the text you want for each Option into BOTH columns for each Option.

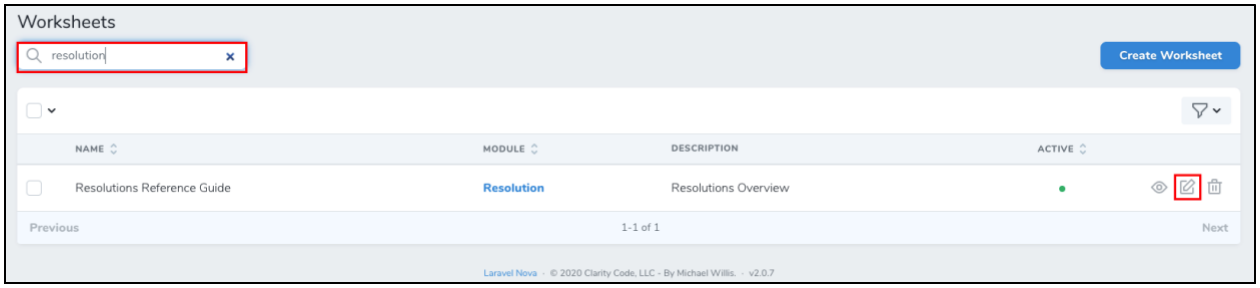
   c. Click Close to complete the Editing for JUST that specific Field.

Note: When using Copy and Paste into Form Fields, you must right click on the mouse and select "***Paste and Match Style***" to see the correct text in the fields when viewing form data that has been entered by end users.

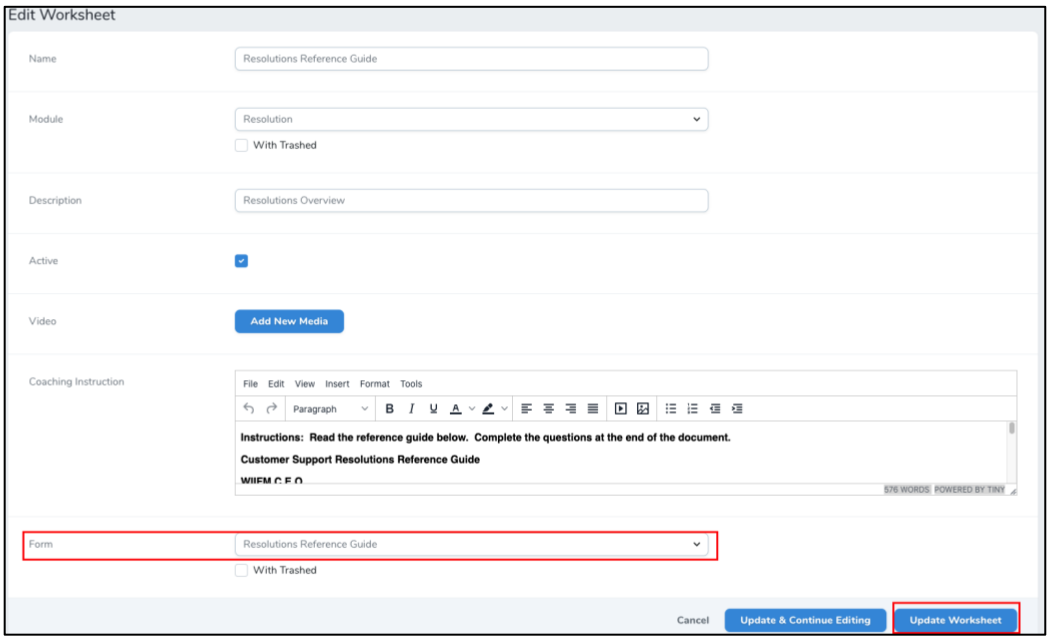


5. Attach the Form to a Worksheet

a. Locate the Worksheet you would like to edit or attach a Form. Use the Search bar to filter the list of Worksheets.
b. Click the Edit icon



c. At the bottom of the Worksheet, select the Form you would like to attach from the Form drop down menu.
d. Click Update Worksheet



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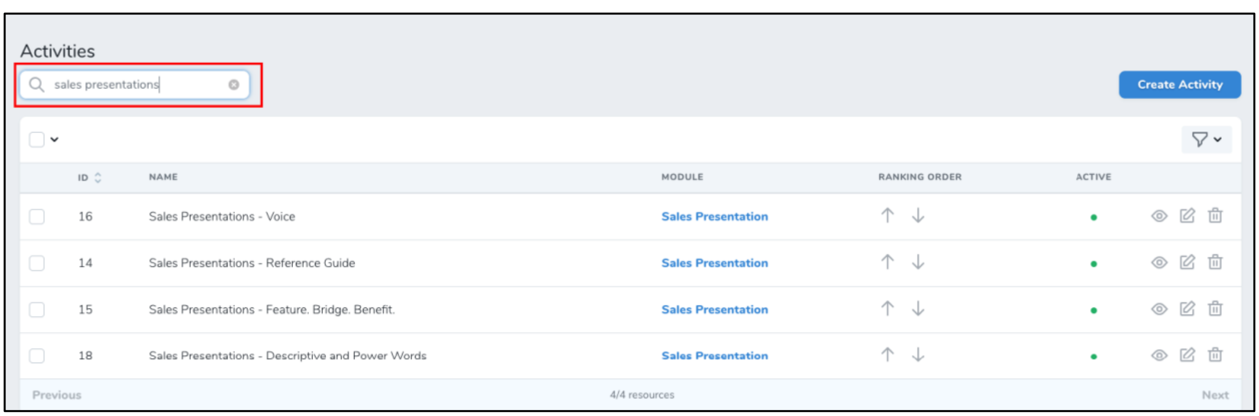
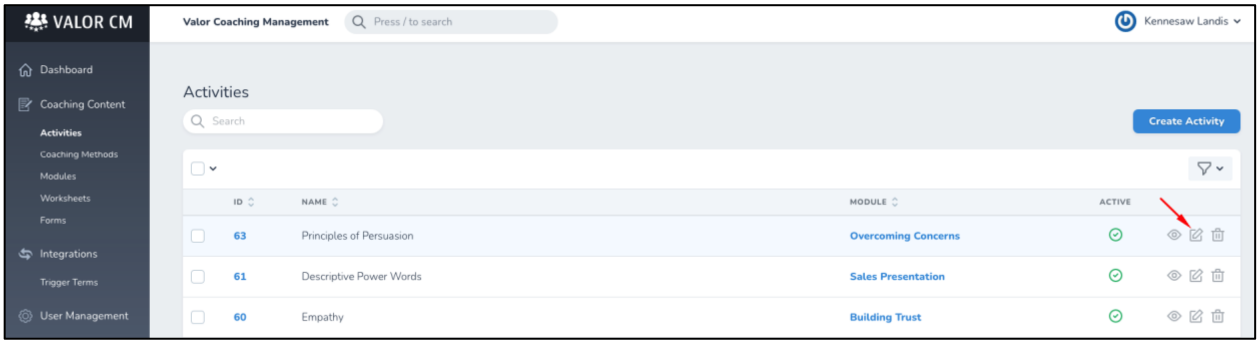
Insert Images into Coaching Activity Instructions and Worksheets

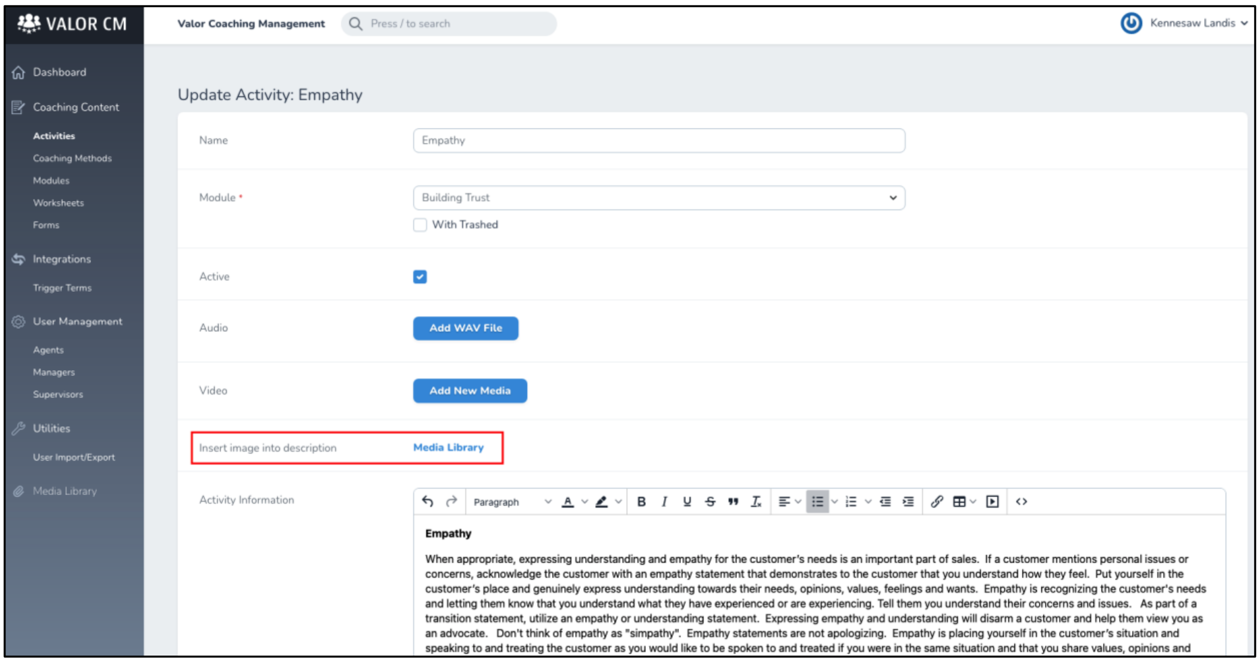
1. Locate the Activity or Worksheet you would like to edit. Use the Search bar to filter the list of Activities or Worksheets.



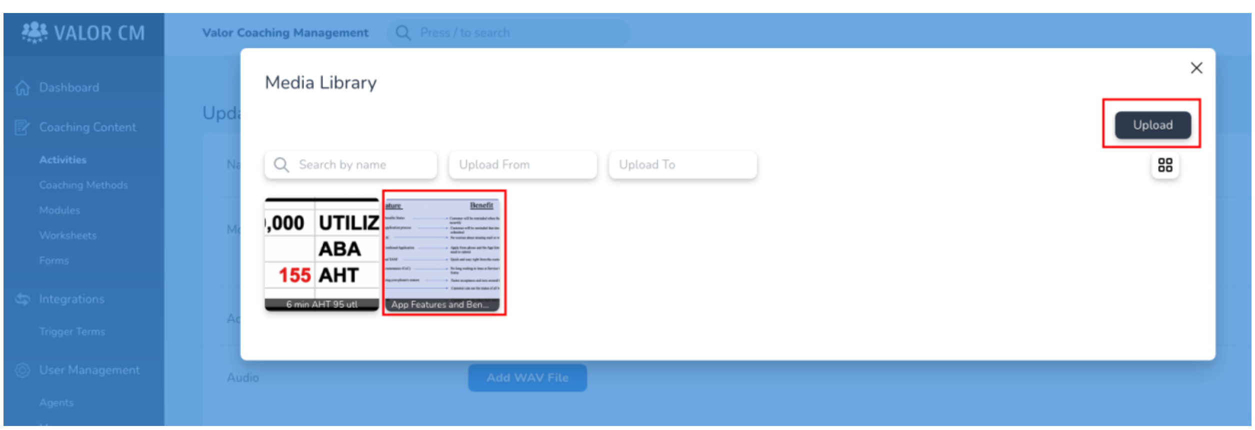
2. Click the Edit icon 



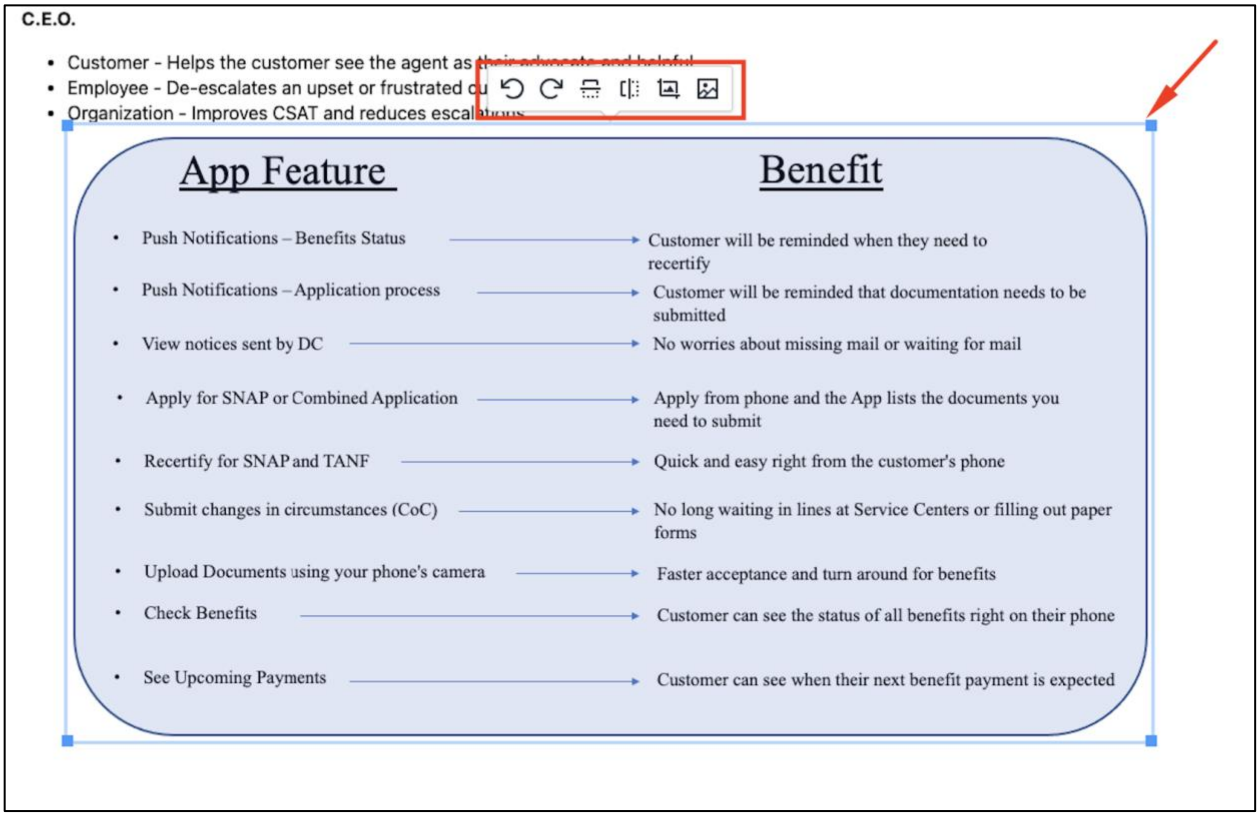
3. Place your mouse curser in the location you would like the image to appear and then click Media Library.



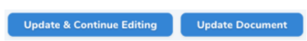
4. Click Upload to choose a new image from your saved images on your computer or click on an image that has already been added to your Media Library.



5. Double click on the image to bring up the image editing tool bar. Rotate, Crop, Brighten or resize your image.



6. Save your changes 

or 

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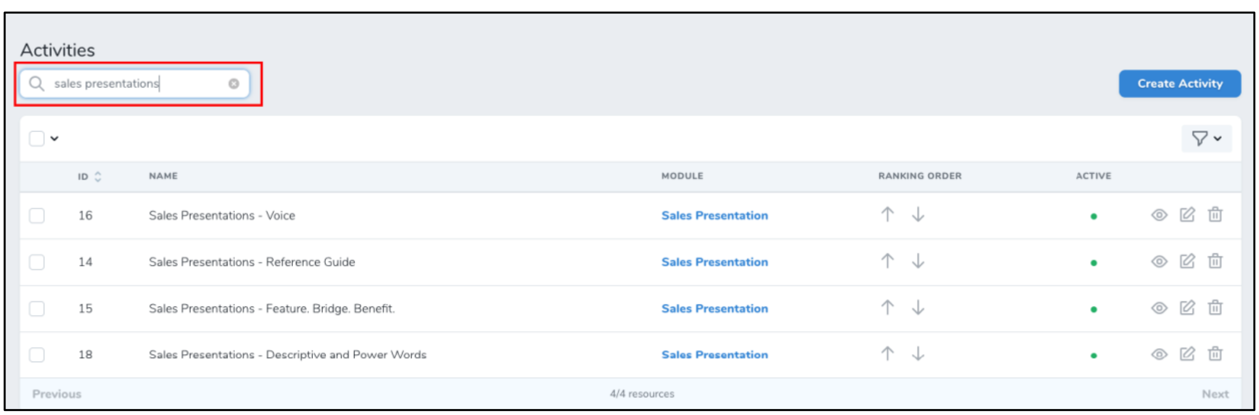
Insert Videos into Coaching Activity Instructions and Worksheets

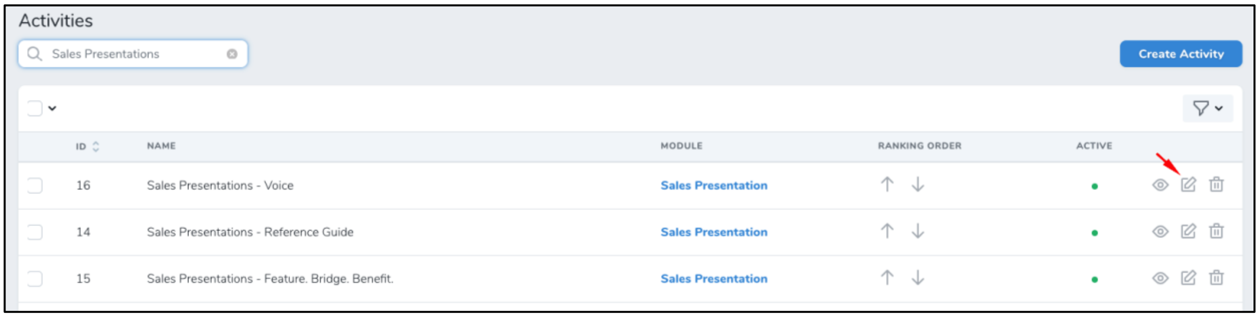
YouTube or Vimeo videos can be viewed in Coaching Activity Instructions and Worksheets, without size restrictions. Videos that are uploaded are restricted to 100 megabytes and MUST be saved in .MP4 format.

YouTube and Vimeo Videos

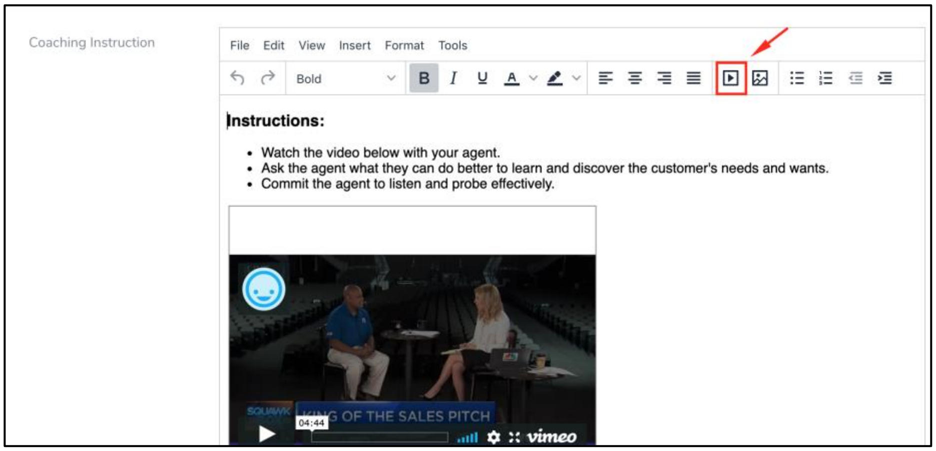
1. Locate the Activity or Worksheet you would like to edit. Use the Search bar to filter the list of Activities or Worksheets.



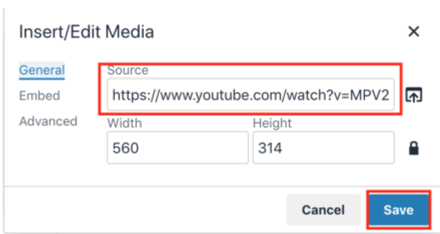
2. Click the Edit icon 

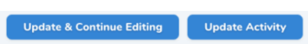
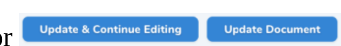


3. Click the Insert Video icon



4. Paste the YouTube or Vimeo URL address in the Source Field and click Save



5. Save your changes  or 

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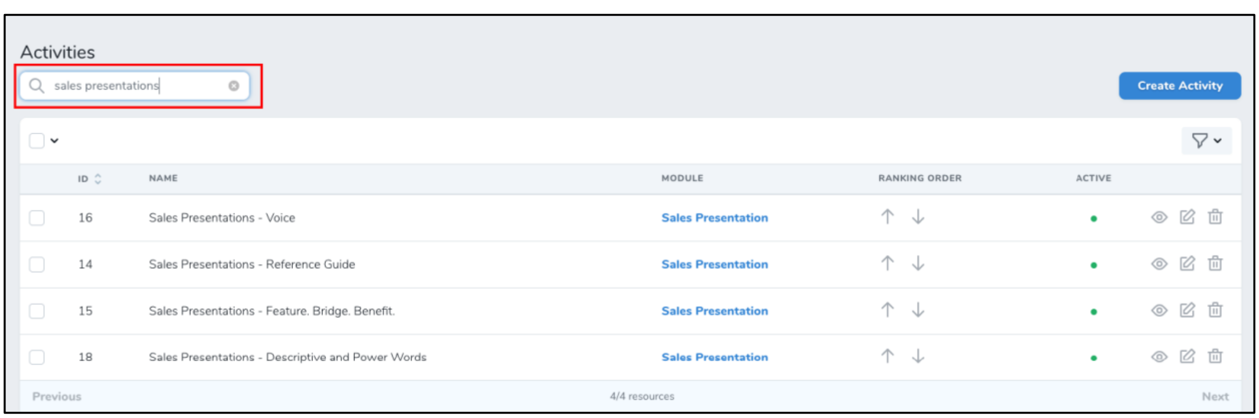
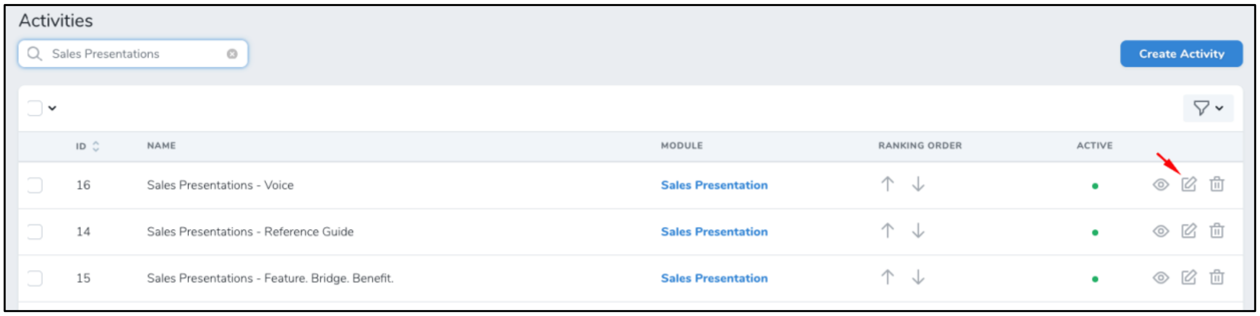
Upload and insert .MP4 Videos (100 MPEG size limit) into Activity Instructions and Worksheets

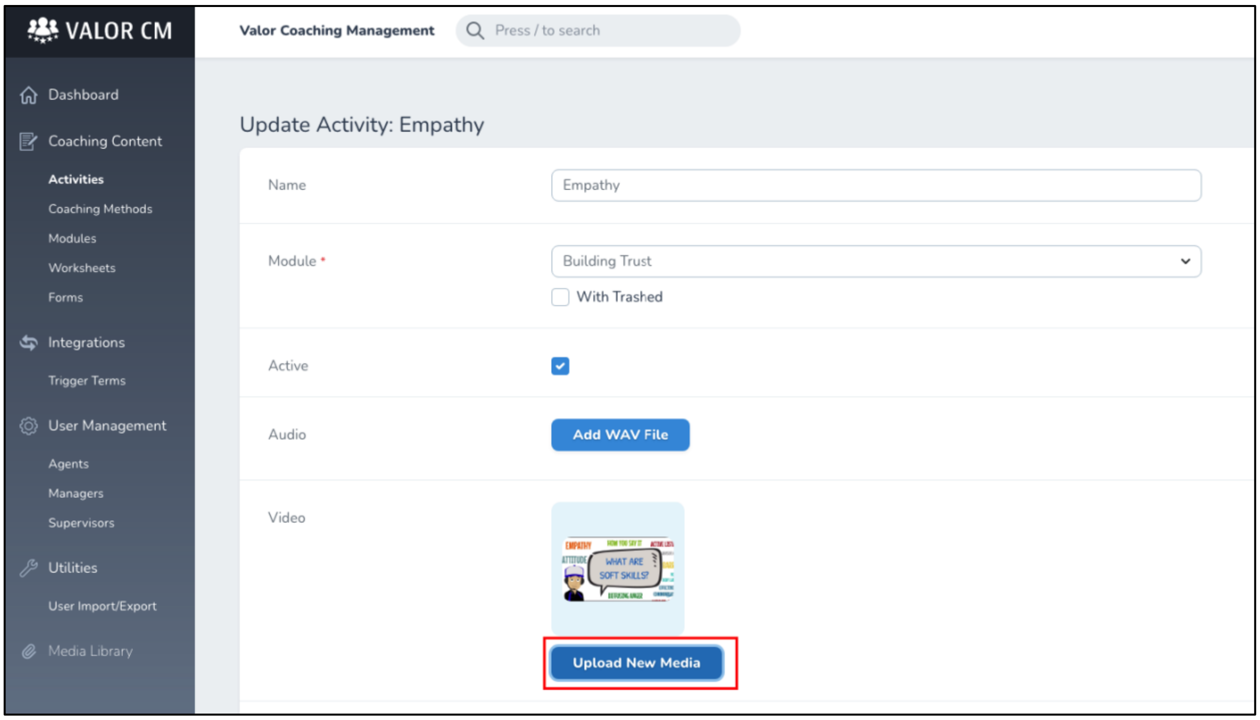
1. Locate the Activity or Worksheet you would like to edit. Use the Search bar to filter the list of Activities or Worksheets.



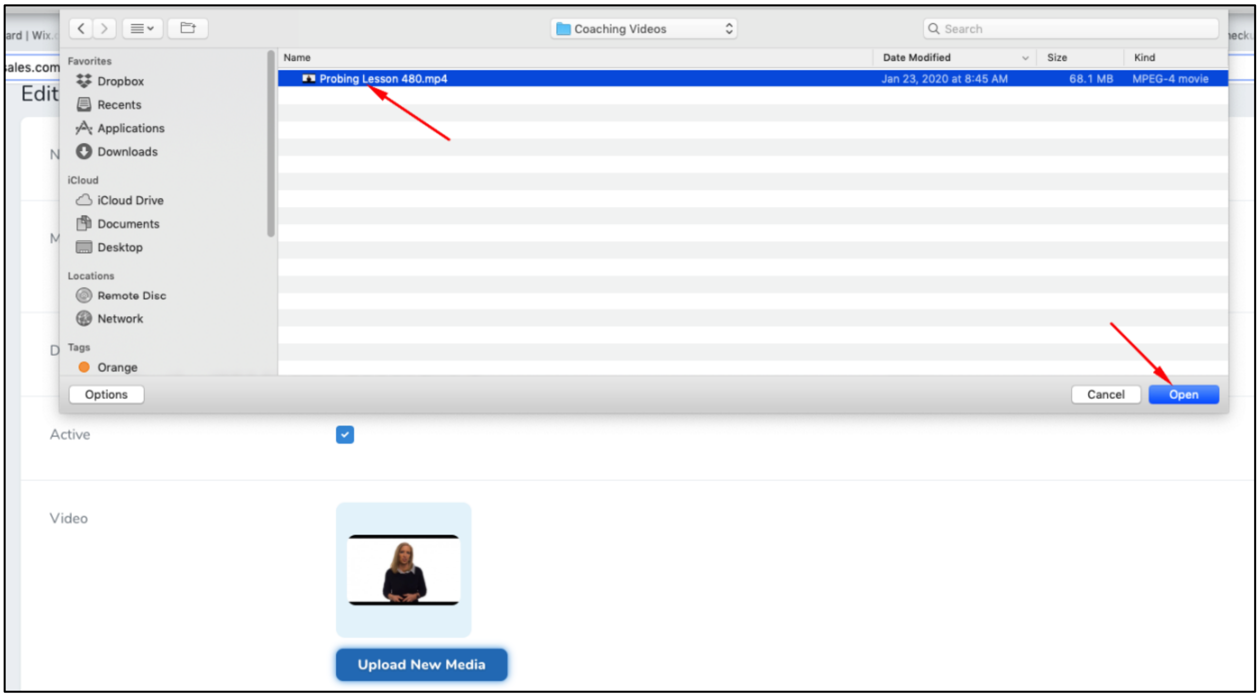
2. Click the Edit icon



3. Click the Add New Media button



4. Locate the Saved .mp4 video in your File Folder and click Open



5. Save your changes 

or 

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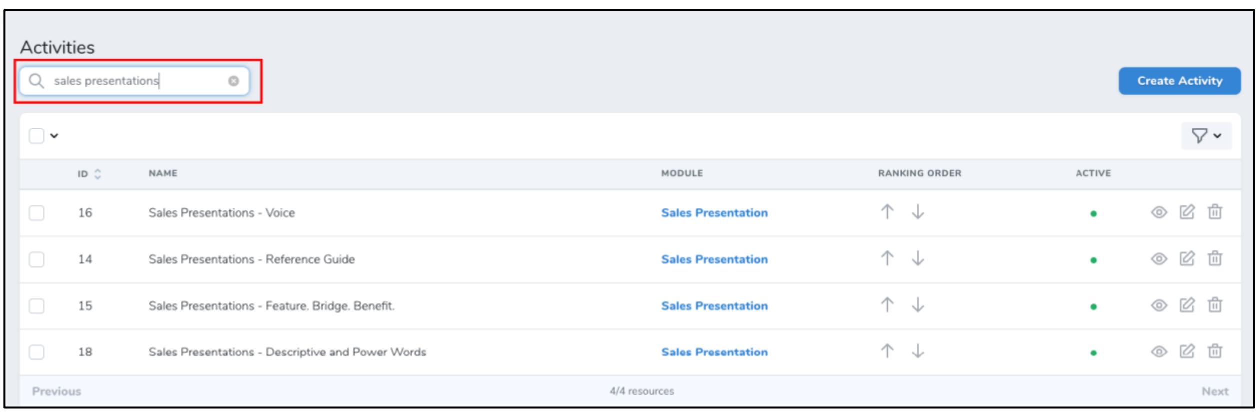
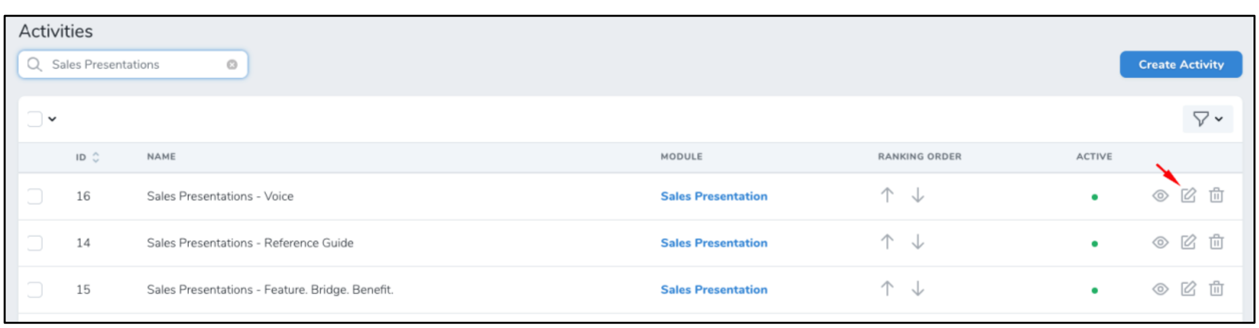
Add Audio Files (.wav) to Coaching Activities and Worksheets

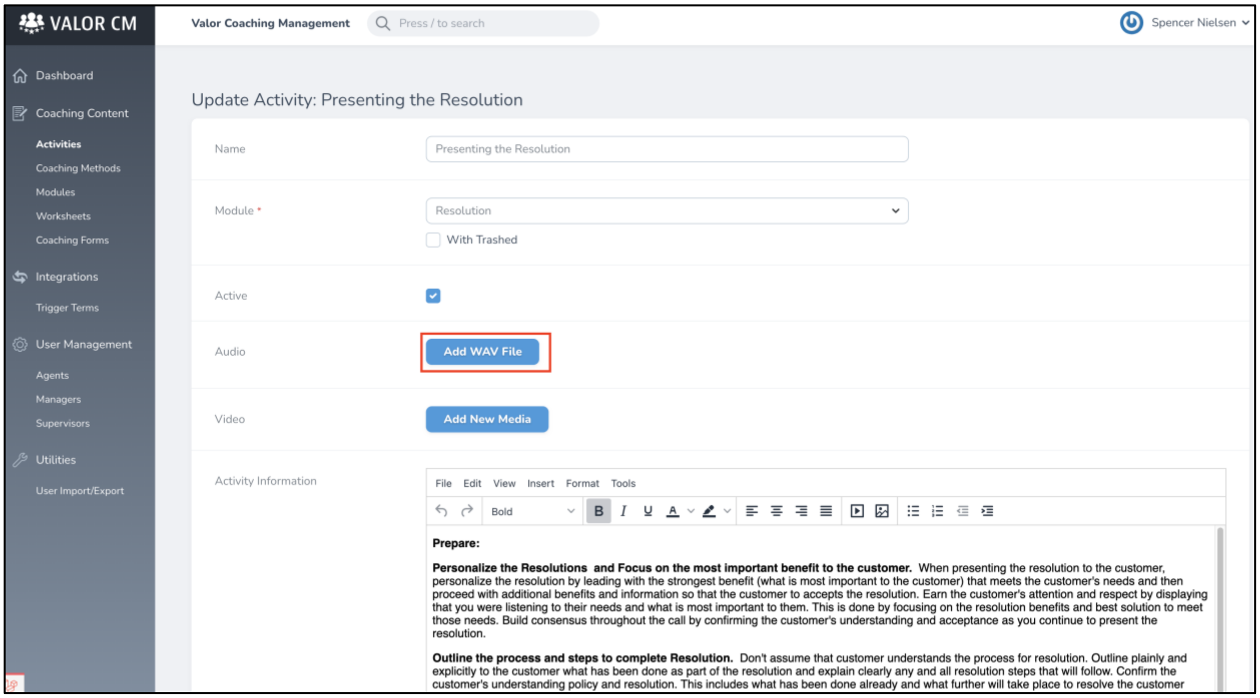
1. Locate the Activity or Worksheet you would like to edit. Use the Search bar to filter the list of Activities or Worksheets.



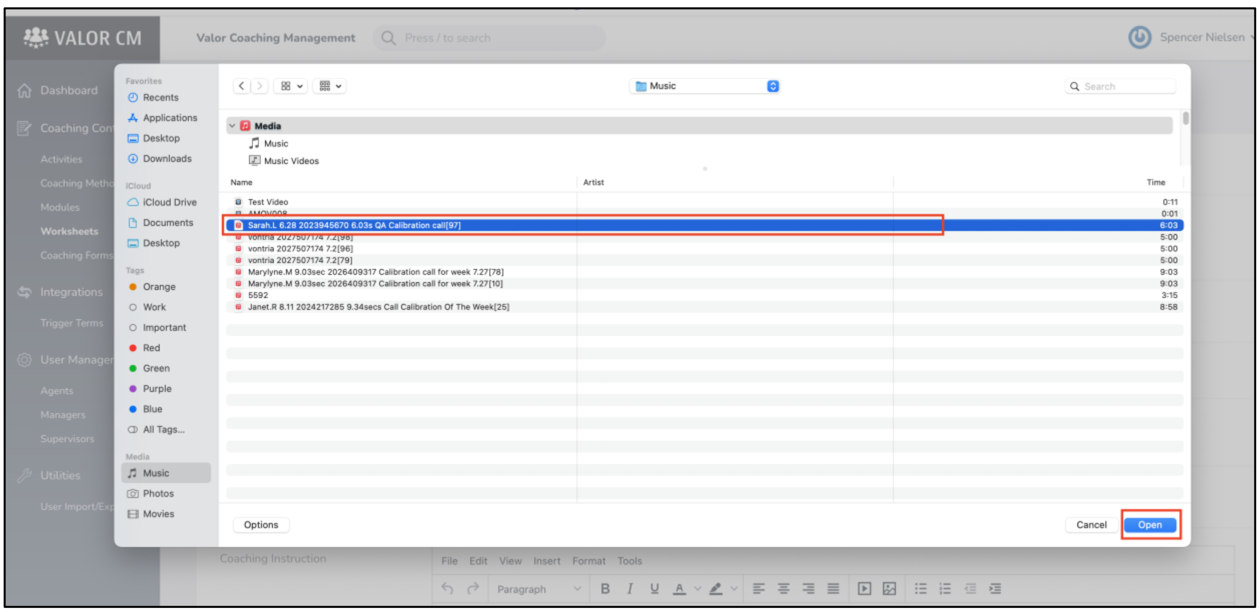
2. Click the Edit icon 

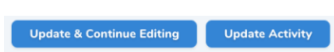


3. Click Add WAV File



4. Locate the saved .wav audio file in your File Folder and click Open



5. Save your changes 

or 

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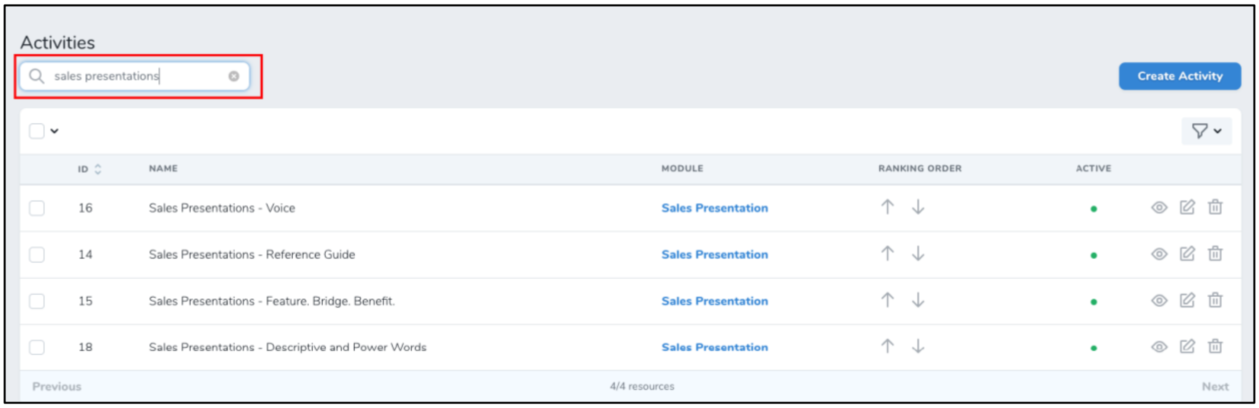
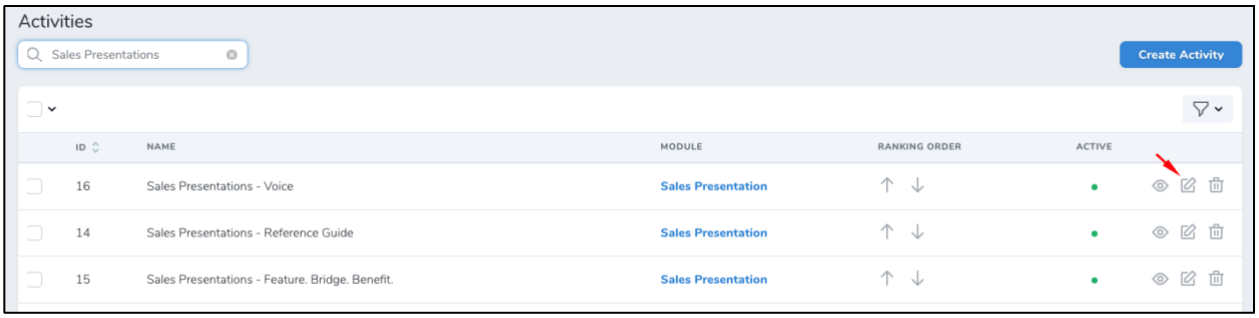
Add PDF (.pdf) files to Coaching Activities and Worksheets

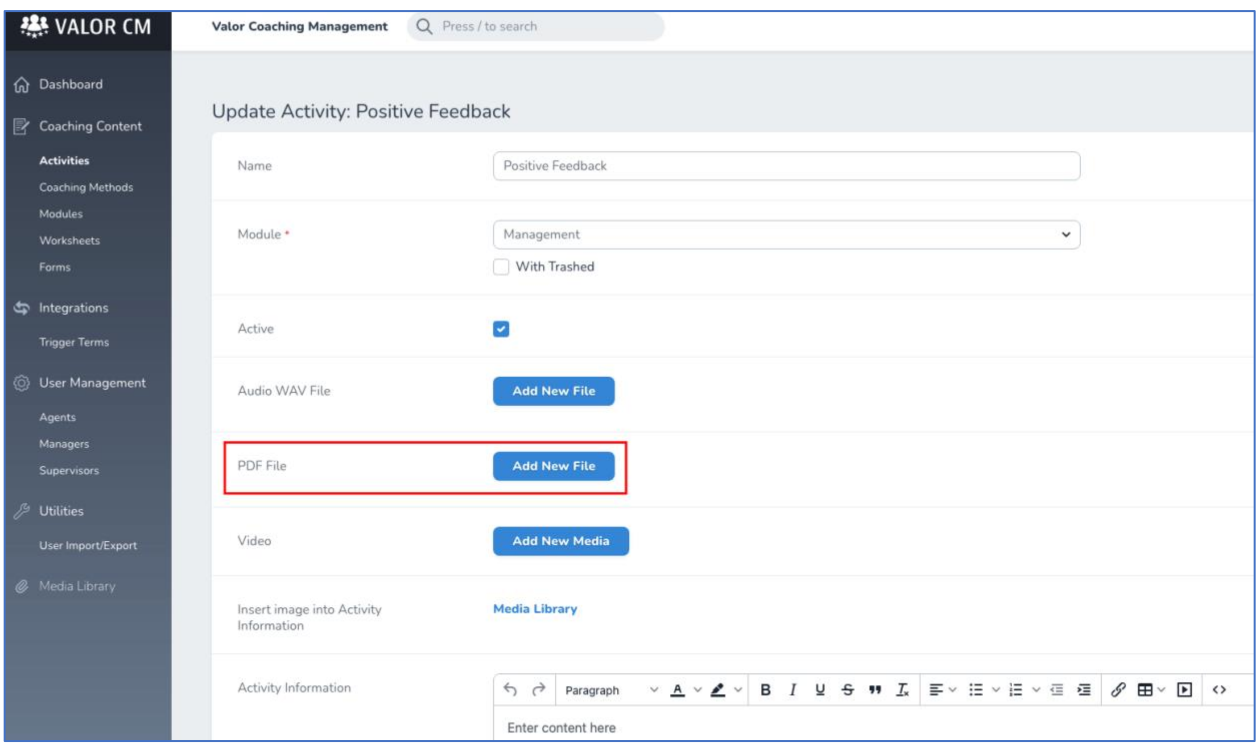
1. Locate the Activity or Worksheet you would like to edit. Use the Search bar to filter the list of Activities or Worksheets.



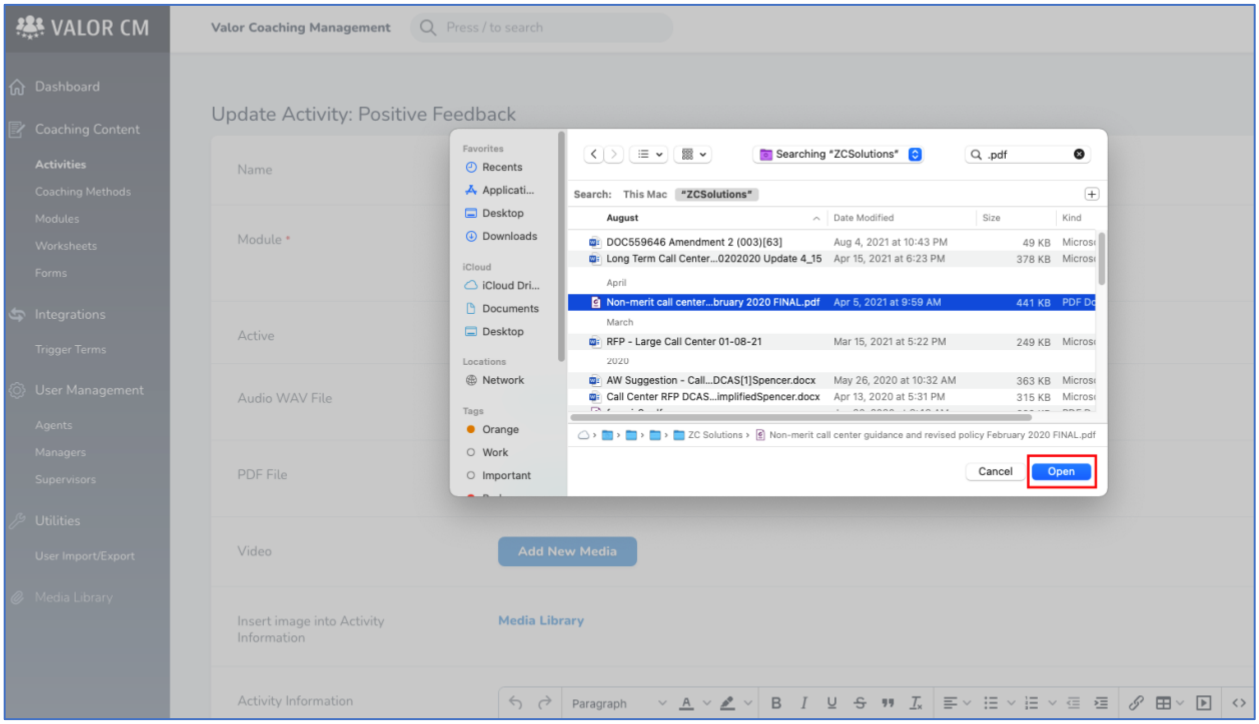
2. Click the Edit icon



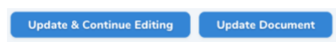
3. Click Add New File



4. Locate the saved .pdf file in your File Folder and click Open



5. Save your changes 

or 

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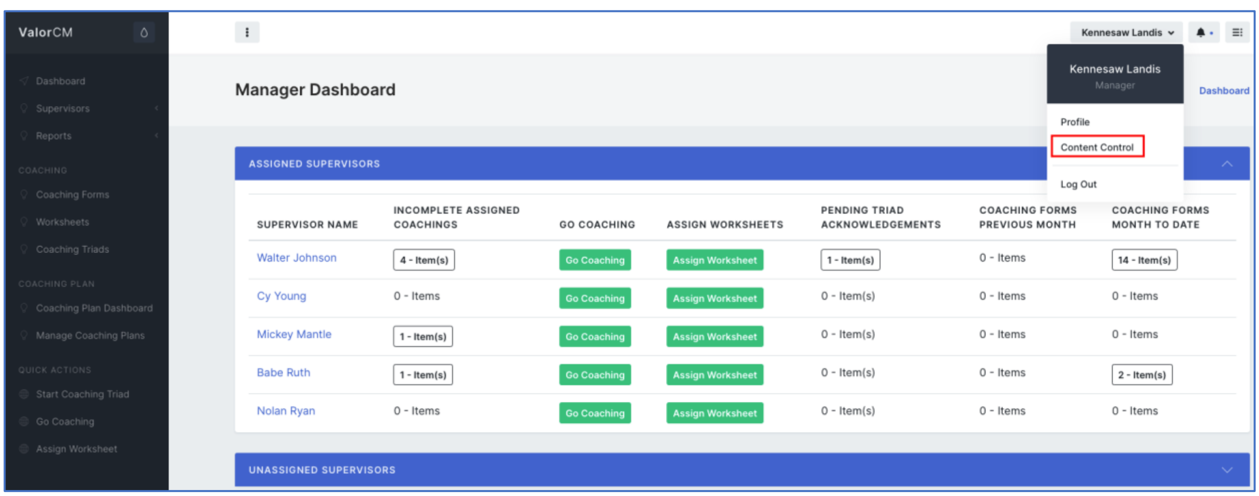
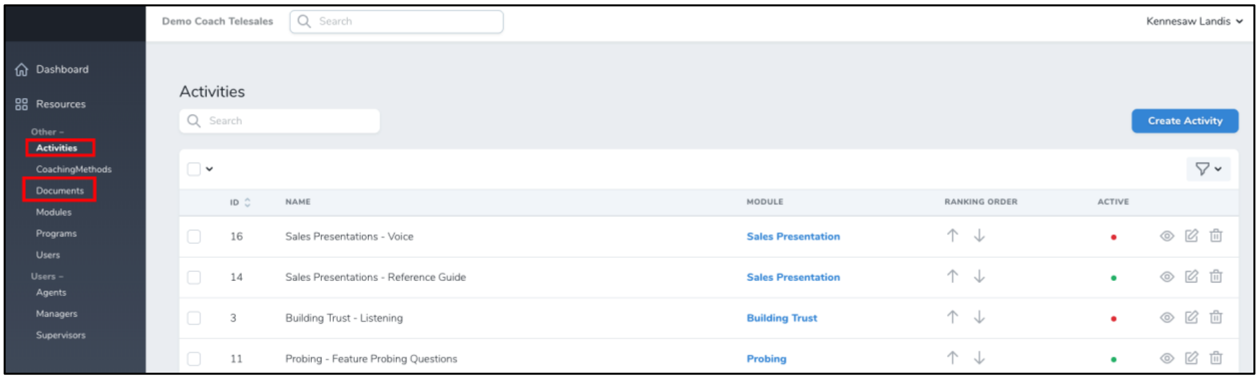
Activate or Deactivate Existing Activities or Worksheets

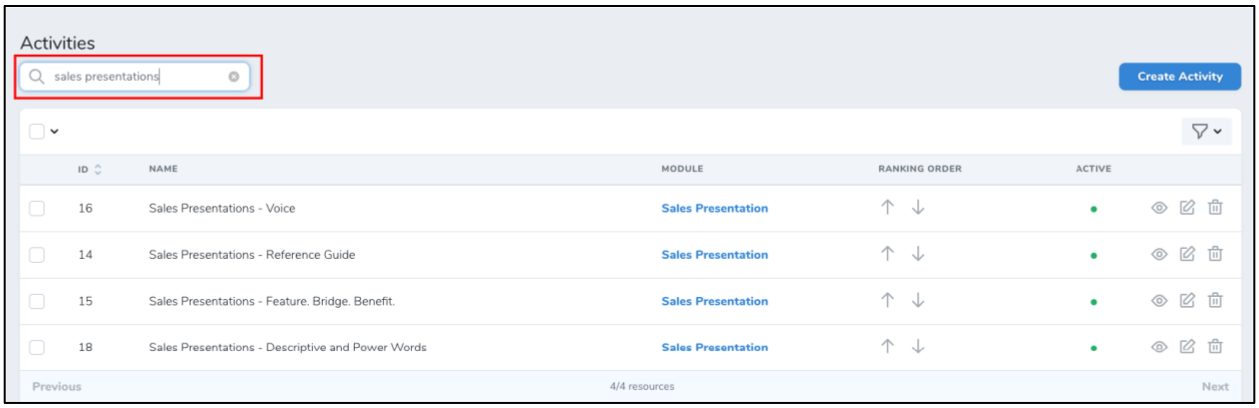
1. Select Content Control from the Username drop down menu



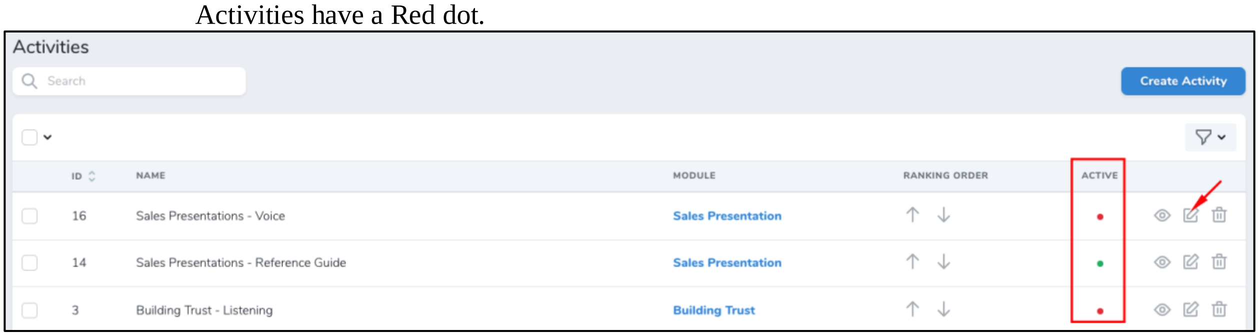
2. Select Activities or Documents from the left drop-down menu



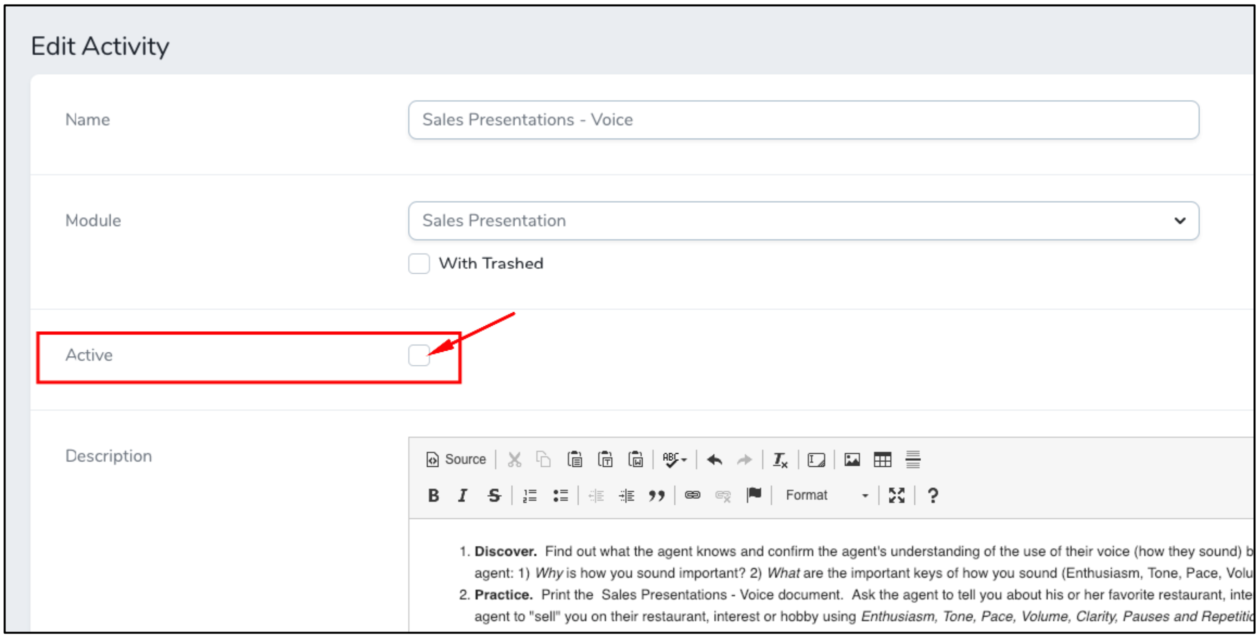
3. Locate the Activity or Worksheet you would like to activate or de-activate. Use the Search bar to filter the list of Activities or Worksheets.



4. Click the Edit icon  for the Activity or Worksheet you would like to Activate or Deactivate
   a. Active Activities and Worksheets have a Green dot in the Active column and inactive Activities have a Red dot.



5. Select or De-select the Active button



6. Save your changes 

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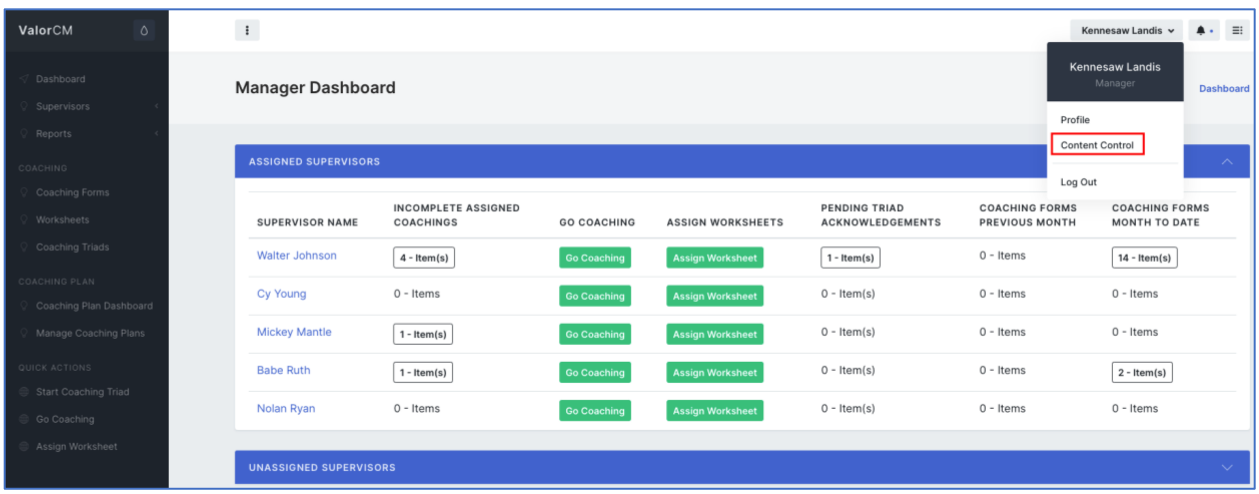
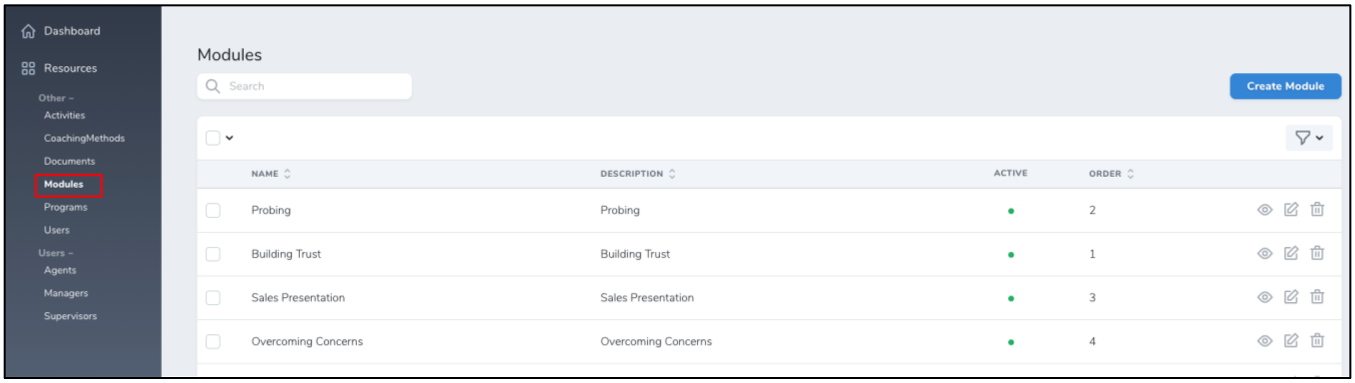
Create New Modules or Edit Existing Modules

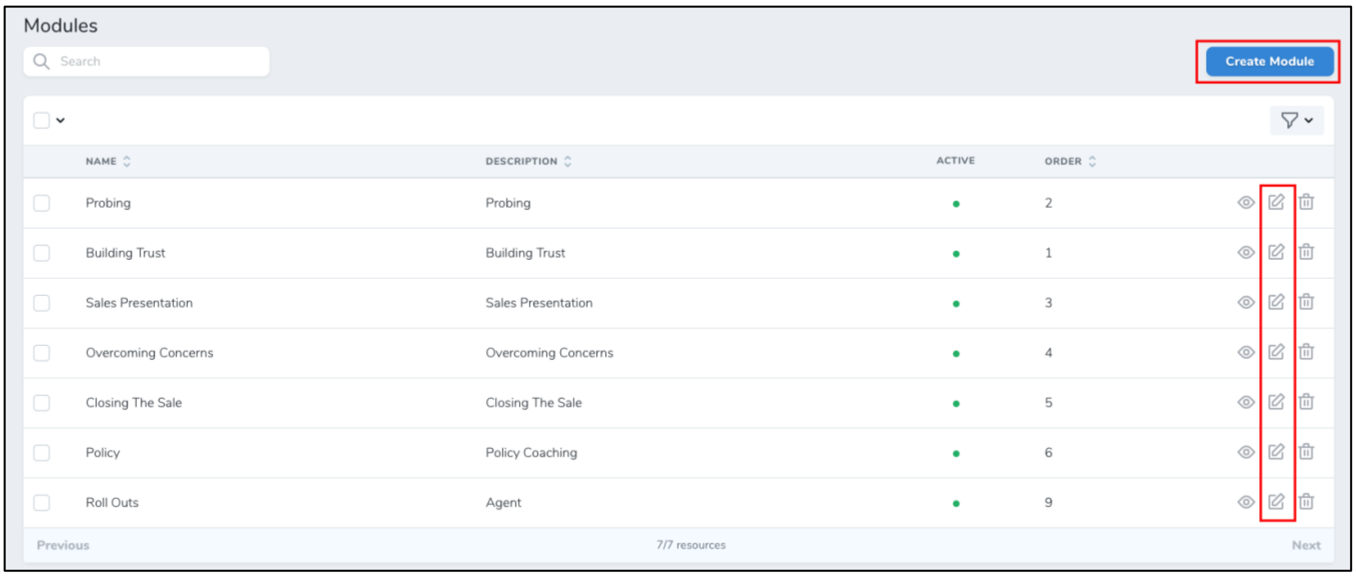
1. Select Content Control from the Username drop down menu



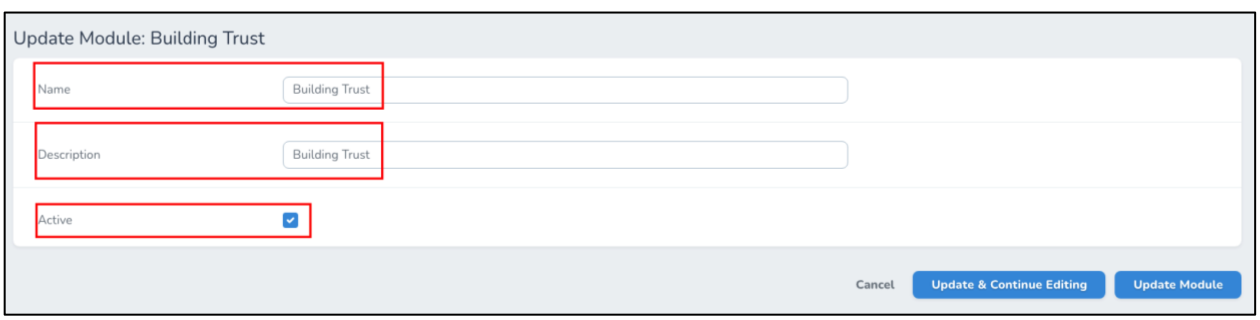
2. Select Modules from the left drop-down menu



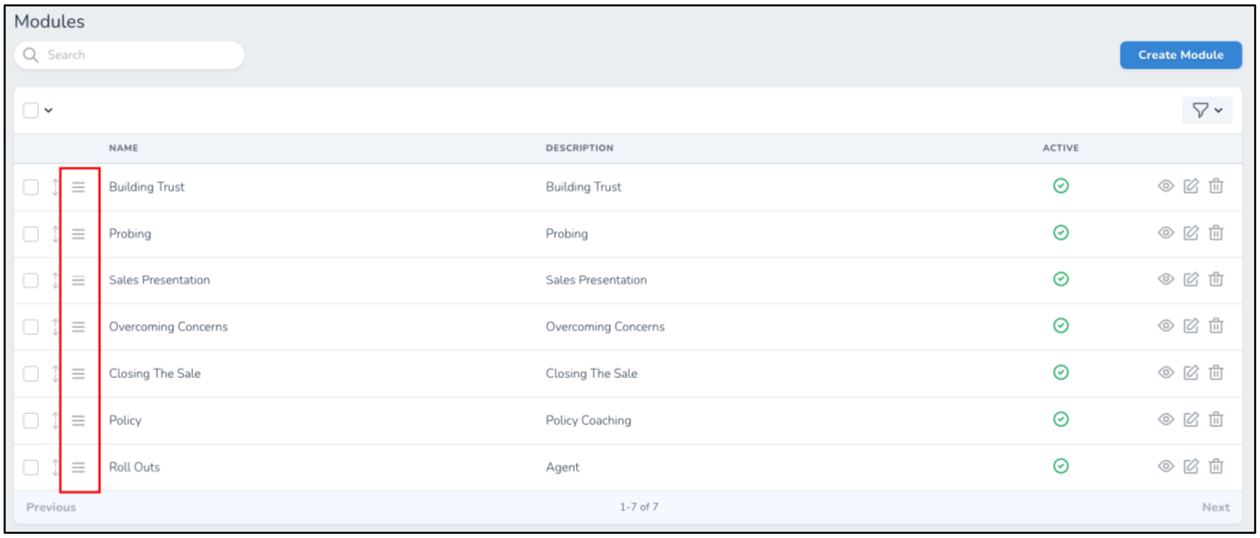
3. Click Create Module to create a new module or click the Edit icon for a selected module to update an existing module.



4. Update or enter the Module information
   a. Module Name
   b. Description
   c. Select Active or Deactivate
   d. Click Update or Create Module



5. Place the Modules in the order that you want them to appear on the coaching dashboard menu by clicking the 3 lines icon and dragging and dropping the Modules into the proper order.



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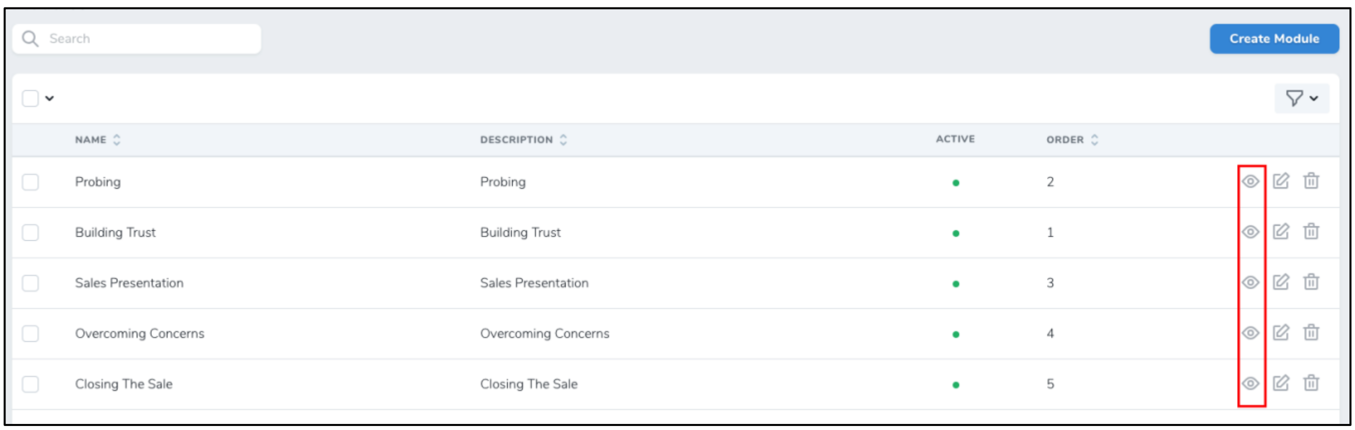
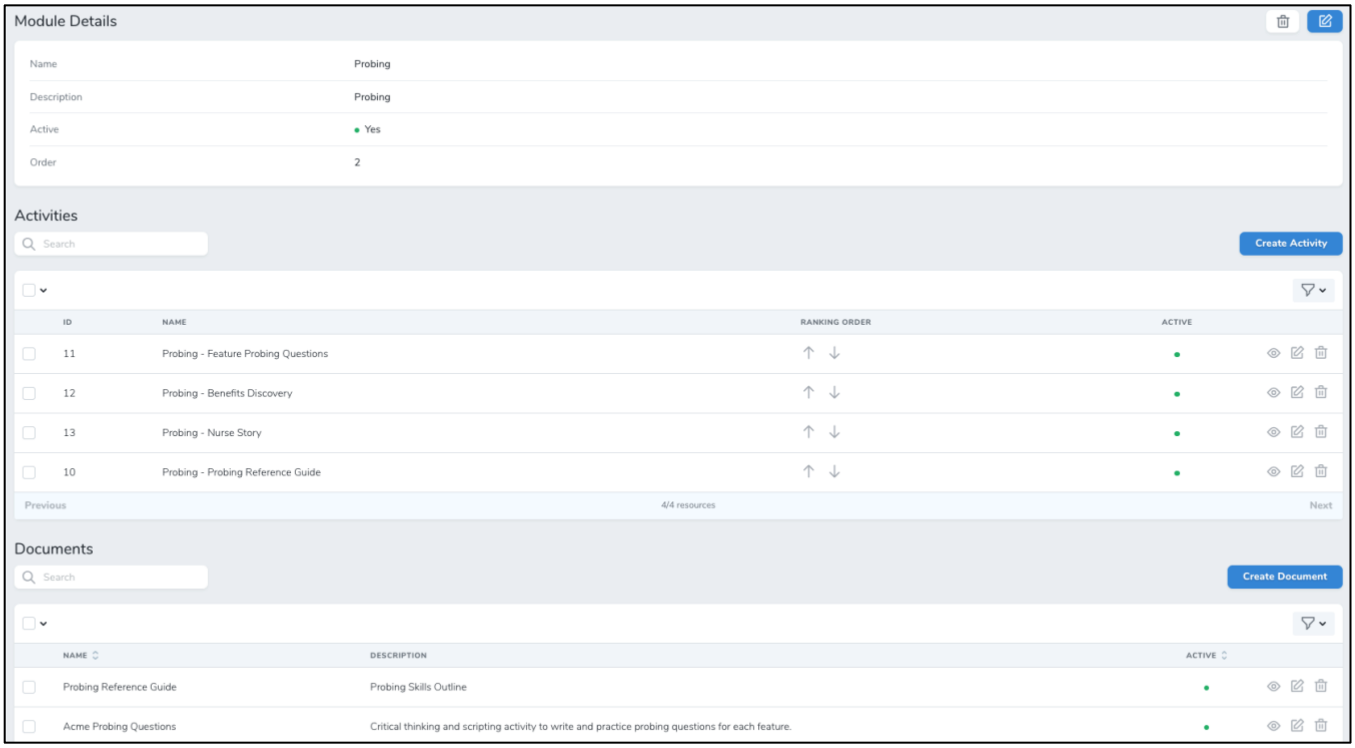
Tip: You can view and edit the specific Activities and Worksheets that are in a specific Module by clicking on the view icon for a Module.



Here you can edit the Module or select any of the Activities or Worksheets to edit. You can also create new Activities and Worksheets.



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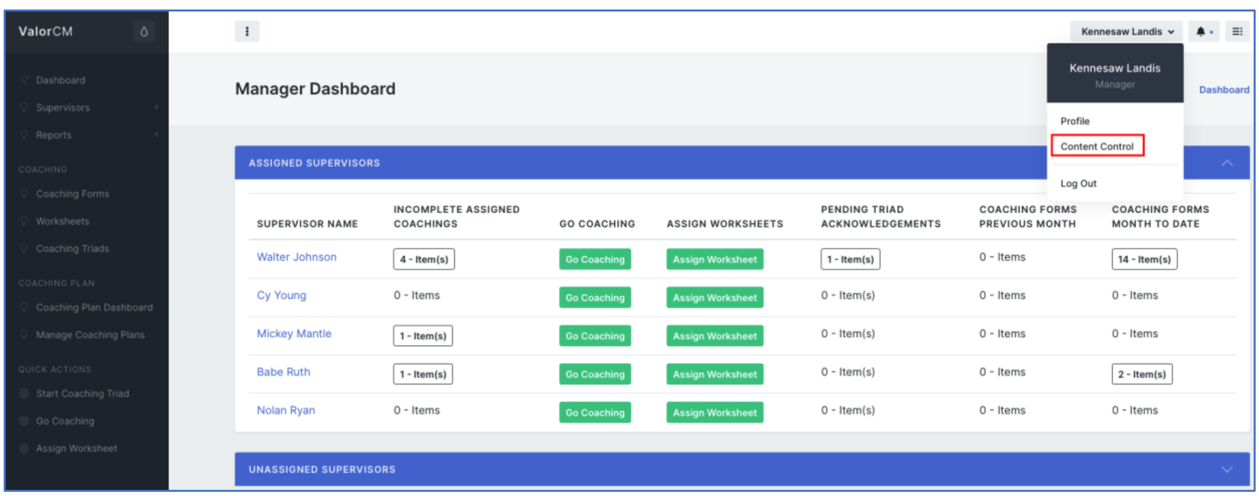
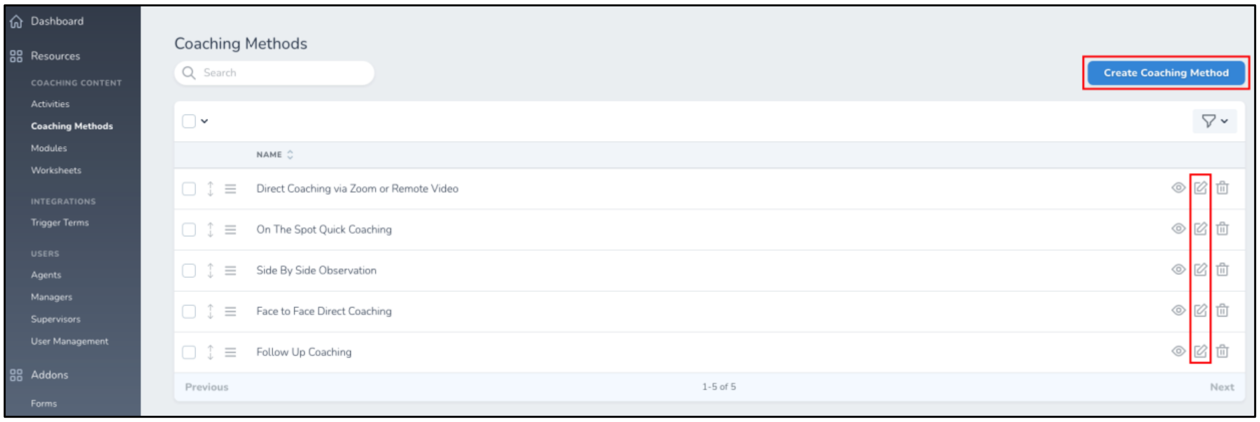
Edit and Create Coaching Methods

1. Select Content Control from the Username drop down menu

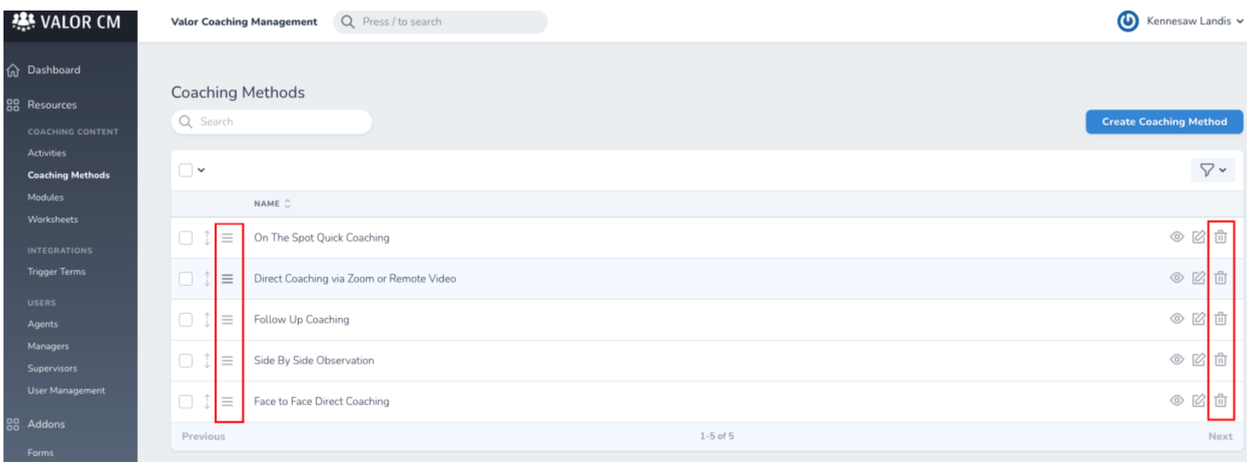


2. Select Coaching Methods from the left drop-down menu



3. Click Create Coaching Method or the Edit icon for the Coaching Method you would like to edit.
4. Enter or update the Name of the Coaching Method
    a. Click Update or Create Coaching Method

5. Reorder the Coaching Methods drop-down menu on coaching forms by clicking on the 3 lines icon ☰ and Dragging and Dropping Coaching Methods into the order you want them to appear.



6. Delete Coaching Methods by clicking the Trash Can icon.

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