

Talkdesk Explore

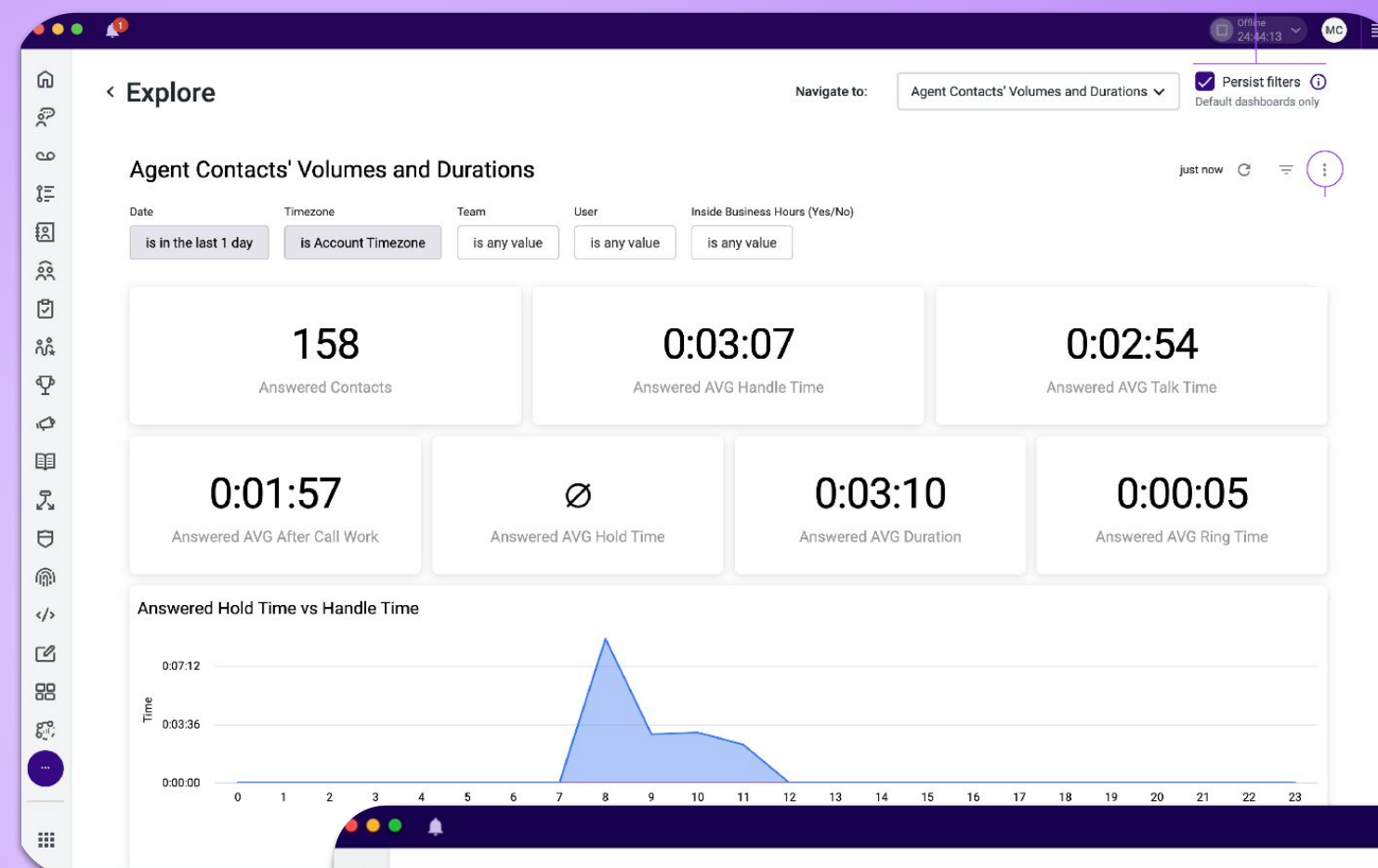
- [Explore | Step-by-step guide](#)



TALKDESK EXPLORE | Step-by-step guide

The following pages show you a step-by-step guide about Talkdesk Explore with the following actions:

- [Explore the Landing Page](#)
- [Research Default Reports and Dashboards](#)
- [Running Reports \(Based on your metrics\)](#)
- [Explore Report Filters](#)
- [Scheduling Reports](#)
- [Sending Reports](#)
- [Downloading Reports](#)



Calls

Call Type	Interaction ID	Ring Groups	Dedicated Line	Call Start Time	Call End Time	Talkdesk Phone Number	Custo
🔗	c82166fa83f44d79b1fd0819130b		FALSE	2023-06-21 12:25:18	2023-06-21 12:26:22	+141581807 (Agentless Dialer Pumping Calls)	+1443
🔗	a8c2e449ac8b42e996c633eff2fc2	agents	FALSE	2023-06-21 12:22:39	2023-06-21 12:23:47	+131466499 (DS-DEMO)	+1541
✖	97a0a960d46f47cc90ead2540c009		FALSE	2023-06-21 12:20:24	2023-06-21 12:20:24	+141581807 (Agentless Dialer Pumping Calls)	+1443
🔗	f0899a55af434acd94252bce9912fb		FALSE	2023-06-21 12:20:21	2023-06-21 12:23:23	+141581807 (Agentless Dialer Pumping Calls)	+1443
🔗	c569f6372e4847de88f848723efbe4	talkdesk demos	TRUE	2023-06-21 12:20:19	2023-06-21 12:22:52	+141581807 (Agentless Dialer Pumping Calls)	+1443
🔗	32fc0a9427a34947a16597ce92c5d		FALSE	2023-06-21 12:20:18	2023-06-21 12:23:20	+141581807 (Agentless Dialer Pumping Calls)	+1443
✖	d97ba853497d46be072021e635d		FALSE	2023-06-21 12:20:17	2023-06-21 12:20:17	+141581807 (Agentless Dialer Pumping Calls)	+1443
🔗	913d0408b1bb4b4ebc36a51bf0f19	talkdesk demos	TRUE	2023-06-21 12:15:25	2023-06-21 12:17:58	+141581807 (Agentless Dialer Pumping Calls)	+1443
🔗	ef365c16a48445bca913fd6b879cb		FALSE	2023-06-21 12:15:21	2023-06-21 12:18:23	+141581807 (Agentless Dialer Pumping Calls)	+1443
✖	e48578b1b0bf46b69fc6aa41f5c544		FALSE	2023-06-21 12:15:20	2023-06-21 12:15:20	+141581807 (Agentless Dialer Pumping Calls)	+1443
🔗	c2d7aeabff57454a9dbc3f9294b2a		FALSE	2023-06-21 12:15:18	2023-06-21 12:18:20	+141581807 (Agentless Dialer Pumping Calls)	+1443
🔗	47ea091f381a4d5eb966b08b8f840		FALSE	2023-06-21 12:15:18	2023-06-21 12:18:20	+141581807 (Agentless Dialer Pumping Calls)	+1443
🔗	153d3b6fcf5349ae9f0550e17bef0a	talkdesk customer service	FALSE	2023-06-21 12:14:24	2023-06-21 12:26:37	+131466499 (DS-DEMO)	+1314
🔗	858f697f14b34274b887383e8d70f5		FALSE	2023-06-21 12:10:30	2023-06-21 12:13:32	+141581807 (Agentless Dialer Pumping Calls)	+1443
🔗	bc232fe5f4e94be8bda9308a676fa		FALSE	2023-06-21 12:10:24	2023-06-21 12:13:26	+141581807 (Agentless Dialer Pumping Calls)	+1443
🔗	29b8775096714eeca07edabb8c1d0		FALSE	2023-06-21 12:10:21	2023-06-21 12:13:23	+141581807 (Agentless Dialer Pumping Calls)	+1443
🔗	59d40b6aaf0b45bc9ef0368aef694f		FALSE	2023-06-21 12:10:19	2023-06-21 12:13:21	+141581807 (Agentless Dialer Pumping Calls)	+1443

Exploring the Landing Page

To access **Explore**, on the left panel, click the **Explore** icon [1].

This brings you to the **Landing Page**. From here, you can click on the report needed or you can click **All types** and select your report type (Default, My Dashboards & Reports or Reports that have been shared [2]).

You also have the ability to **search** for the report you are looking for. In the **search bar**, simply type in the name or name containing in the report [3].

The screenshot displays the Talkdesk Explore interface. The top navigation bar includes a home icon, a search bar, and a 'Create' button. The main content area shows a list of reports with columns for Name, Type, Schedules, and Creator. A search bar is visible at the bottom of the list, containing the text 'Agent'. A dropdown menu is open, showing options for report types: All types, Default dashboards, Default reports, My dashboards, My reports, and Reports shared with me. Three callout boxes are present: [1] points to the 'Explore' icon in the left sidebar, [2] points to the 'All types' dropdown menu, and [3] points to the search bar.

Name	Type	Schedules	Creator
Account Breakdown Report	Default reports	0	
Activity Report	Default reports	0	
Agent Contacts' Volumes and Durations	Default dashboards	0	
Agent Details	Default dashboards	0	
Agents	Default dashboards	0	Default
Agents Breakdown Report	Default reports	0	Default
Agents Inbound Dispositions Report	Default reports	0	Default
Agents Outbound Dispositions Report	Default reports	0	Default
Agents Report	Default reports	0	Default
Agents Status Report	Default reports	0	Default



Researching Reports & Dashboards

Explore

8 items All types

Name	Type	Creator	Schedules
Agent Contacts' Volumes and Durations	Default dashboards	Default	0
Agent Details	Default dashboards	Default	0
Agents	Default dashboards	Default	0
Agents Breakdown Report	Default reports	Default	0
Agents Inbound Dispositions Report	Default reports	Default	0
Agents Outbound Dispositions Report	Default reports	Default	0
Agents Report	Default reports	Default	0
Agents Status	Default reports	Default	0

talkdesk DATA DICTIONARY [Guides](#) [Knowledge Base](#) [Contact Us](#)

Talkdesk Data Dictionary

Welcome to the Talkdesk Data Dictionary!

Here you can find a comprehensive list of Talkdesk key metrics and their definitions. The data dictionary provides details about every data attribute and metric available in Talkdesk, so you can determine the definition, its calculation if applicable, and details about where to find and how to use it.

All time-based data is presented in the timezone of the account or phone number.

[Get Started](#)

Home

Default Reports

- Account Breakdown
- Activity Report
- Copilot Recommendations
- [View More...](#)

Explore API Reports

- User Status Report via Explore API

Default Dashboard (historical metrics)

- Agent Contacts Volumes and Durations
- Agents
- Agent Details Dashboard
- [View More...](#)

Create Datasets

- Agent Activity Analysis
- Calls Analysis
- Cases

Custom Table Calculations

- Functions
- Operators

Live

- Live Metrics

Take a moment to click around in **Explore** and bring up some reports and dashboards available.

If needed, launch the [Data Dictionary](#) to assist in finding the perfect report for your contact center.



Running Reports & Dashboards

Account Breakdown Report

Activity Report 1

Agent Contacts' Volumes and Durations

Agent Details

Activity Report 2

just now

Run



Filters (4) Call Ring Group is any value AND Phone Number is any value AND Timezone is Account Timezone AND Dedicated Line is any value

Day Date	2024-07-31	2024-08-01	2024-08-02	2024-08-03	2024-08-04	2024-08-05	2024-08-06	WTD	MTD	YTD
Metric Name	Metric Value	Metric Value	Metric Value	Metric Value	Metric Value	Metric Value	Metric Value			
Inbound Calls	0	0	0	0	0	0	0	0	0	1
Inbound Calls Average Talk Time										
Inbound Calls Longest Talk Time										
Inbound Total Talk Time										
Inbound Answered Calls	0	0	0	0	0	0	0	0	0	0
Inbound Missed Calls	0	0	0	0	0	0	0	0	0	0
Inbound Calls Average Waiting Time										
Inbound Calls Longest Waiting Time										
Inbound Calls Average Holding Time										
Inbound Calls Longest Holding Time										
Inbound Calls Abandoned	0	0	0	0	0	0	0	0	0	0
Inbound Calls Abandon Rate										0.00 %
Inbound Calls Average Abandon Time										
Inbound Calls Short Abandon	0	0	0	0	0	0	0	0	0	0
Outbound Calls	1	0	0	0	0	0	1	1	2	5
Service Level										

Once you have located the report or dashboard in **Explore** that you would like to run, click on the report **Name [1]**. Once you click the name, by default the report is going to run for you.

View the report that just ran [2].

There will be no filters applied to the report and all data will present. We will apply filters in the next step.



Exploring Report Filters

1

Activity Report

Filters (4) Call Ring Group is any value AND Phone Number is any value AND Timezone is Account Timezone AND Dedicated Line is any value

Day Date	2024-07-31	2024-08-01	2024-08-02	2024-08-03	2024-08-04	2024-08-05	2024-08-06
Metric Name	Metric Value	Metric Value	Metric Value	Metric Value	Metric Value	Metric Value	Metric Value
Inbound Calls	0	0	0	0	0	0	0
Inbound Calls Average Talk Time							
Inbound Calls Longest Talk Time							
Inbound Total Talk Time							

2

Activity Report

Filters (4)

Call Ring Group is equal to

Dedicated Line is

Phone Number is equal to

Timezone is Account Timez

3

Run

Activity Report

Filters (4)

Call Ring Group is equal to

Dedicated Line is TRUE

Phone Number is equal to

Timezone is America - Denve

Once you have selected your report and your report has data presented (previous step), you can now apply filters.

On the report toward the top left, you'll see the **Filters** option. Click on the little arrow to the left and it will open up the filtering options [1].

Now you can **select** which **filters** you want to apply to the report [2].

Once your filters are applied, click the **Run** button at the top right of the report [3].

The report will then present you with the new data with the filtered criteria.



Scheduling Reports

The screenshot shows the 'Schedule Activity Report' dialog box in the Talkdesk interface. The dialog box is titled 'Schedule Activity Report' and has a close button in the top right corner. It contains the following elements:

- Run Button:** A blue button labeled 'Run' with a gear icon to its right, circled with a purple circle containing the number 1.
- Download Menu:** A dropdown menu with options 'Download', 'Send', and 'Schedule', circled with a purple circle containing the number 2.
- Schedule Dialog:** A modal dialog box titled 'Schedule Activity Report' with a close button in the top right corner, circled with a purple circle containing the number 3.
 - Name Field:** A text input field labeled 'Give your schedule a name.' with the value 'Activity Report' entered.
 - Data Destination:** A section titled 'Where should this data go?' with a radio button selected for 'Email'.
 - Email Recipients:** A text input field labeled 'Who should it be emailed to? *' with a red border and a message below it: 'This field is required. Add recipients, use commas for multiple addresses'. This field is circled with a purple circle containing the number 4.
 - Delivery Schedule:** A section titled 'Deliver this schedule' with radio buttons for 'Daily', 'Weekly', 'Monthly', 'Hourly', and 'By minute'. The 'Daily' option is selected.
 - Send At:** A section with two input fields: 'Send' (set to 'Every day') and 'At' (set to '6 : 00 : AM').
 - Filters:** A section titled 'Filters' with a dropdown menu showing 'Call Ring Group Call Ring Group is any value Phone Number Phone Number is any value Dedicated Line Dedicated L...'. This section is circled with a purple circle containing the number 5.
 - Advanced options:** A section titled 'Advanced options' with a dropdown menu.
 - Buttons:** A 'Send Test' button at the bottom left and a 'Save All' button at the bottom right, both circled with purple circles containing the numbers 5 and 6 respectively.
 - Footer:** A footer bar with 'Unsaved Changes' (yellow triangle icon), 'Cancel', and 'Save All' buttons.

Now that your report is filtered and ran, it is time to **Schedule** the report.

To the right of the Run button, there is a **cog wheel** [1].

Click Schedule [2].

The **Schedule Activity Report** screen will display [3], fill this out accordingly. Name, Email to send to, Delivery schedule, filters, etc. [4].

Once complete you can **Send Test** [5], and don't forget to **Save All** changes [6].



Sending Reports

1

2

3

Run

Download

Send

Schedule

Send Activity Report

Title

Give your schedule a name.

Activity Report

Where should this data go?

Email

Email

Who should it be emailed to? *

This field is required. Add recipients, use commas for multiple addresses

Filters

Call Ring Group Call Ring Group is any value Phone Number Phone Number is any value Dedicated Line Dedicated L...

Advanced options

Send

Now that your report is filtered and ran, you have the ability to **Send** the report.

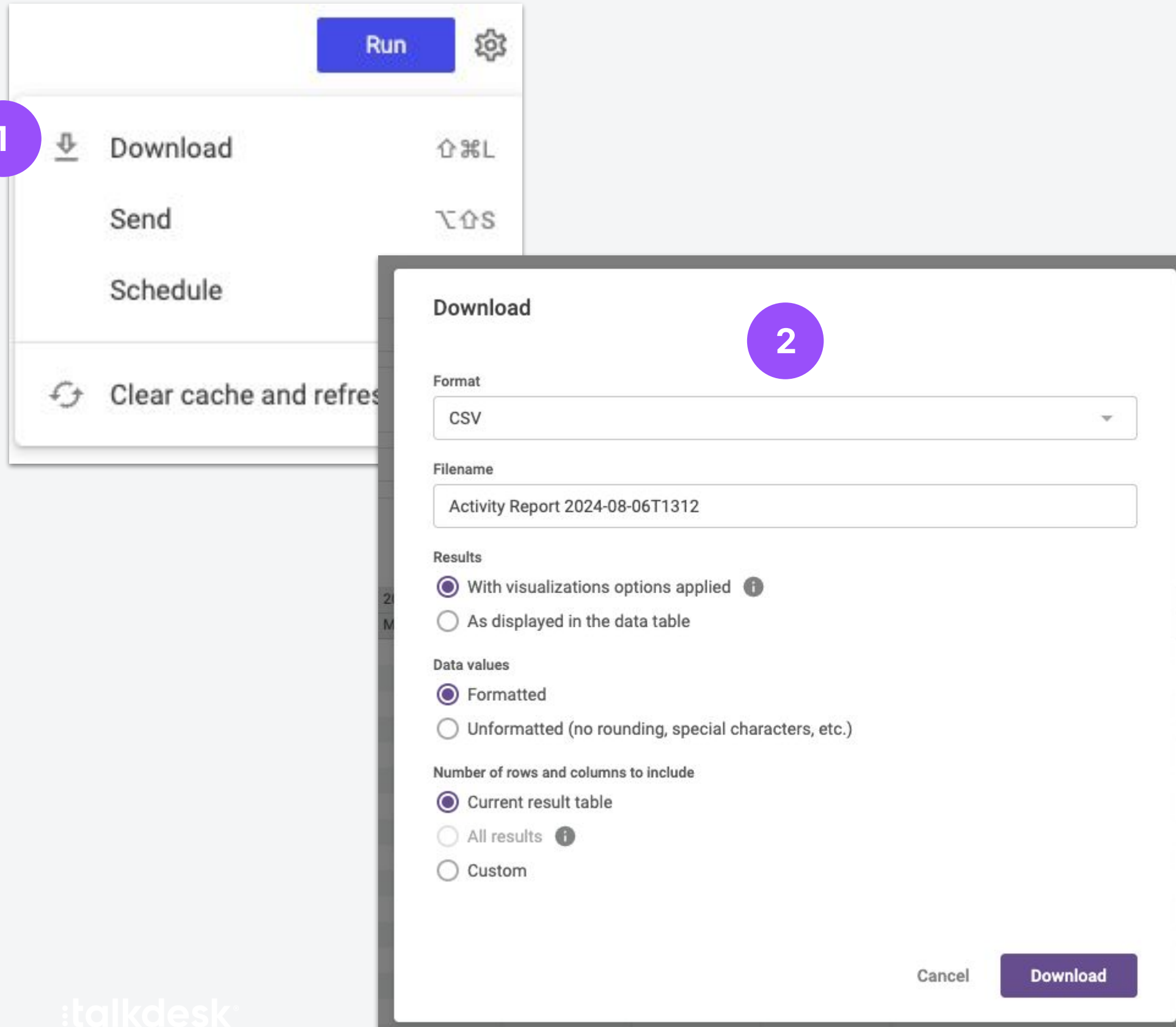
Next to the **Run** button, click the cog wheel and select the **Send** option [1].

The **Send Activity Report** screen will display, give your activity a Title, Email to be sent, apply additional filters if you'd like [2].

Click **Send** [3].



Downloading Reports



Now that your report is filtered and ran, you have the ability to **Download** the report.

Next to the **Run** button, click the cog wheel and select the **Download** option [1].

The **Download** screen will present. Choose your Format, Results, Data Values and Number of rows and columns to include [2].

Click **Download** [3].