



THE INTELLIGENT CONTACT CENTRE PLATFORM

Smarter Calls. Deeper Insights. Better Outcomes.

One browser-based platform for outbound dialling, inbound queues, omni-channel messaging, AI-driven quality assurance and live performance intelligence — built for sales and service teams who measure everything and waste nothing.

What's Inside

TURN TO THE PAGE SHOWN FOR THE DETAIL



The Agent Desktop

A browser-based workspace with softphone, call scripts, web forms, callbacks and each agent's own live stats.

Zero installs

PAGE 3



Predictive Dialling

Four dialling modes with live pacing control, hopper management, time-zone safety and caller-ID health tracking.

4 dialling modes

PAGE 4



SmartDial & Data Flows

Blend lead lists by priority, filter and calling window, then automate what happens on every call outcome.

7 automated actions

PAGE 5



Inbound Queues & IVR

IVR menus, ACD queues, DDI routing and callback handling, with full service-level and abandon reporting.

Full SLA reporting

PAGE 6



Live Wallboards

Full-screen displays for the call centre floor, plus real-time agent and campaign monitors and live coaching.

3 wallboard displays

PAGE 7



Agent Gamification

A monthly agent league with five levels, milestones, live leaderboards, career ranks and a TV wallboard.

5 levels, 25 milestones

PAGE 8



Recordings & Auto QA

Every call recorded, transcribed, sentiment-scored and summarised, then rated against your own QA criteria.

100% transcribed

PAGE 9



Omni-Channel Messaging

SMS, WhatsApp, email and live chat, all handled in one shared inbox and reported alongside your voice calls.

6 contact channels

PAGE 11

100%
CALLS RECORDED

AI
SCORED QUALITY

6
CONTACT CHANNELS

50+
MANAGER REPORTS

Live
REAL-TIME DATA

Zero
SOFTWARE INSTALLS



WHY APEX

A Platform Built Around Performance

Apex brings enterprise-grade telephony, omni-channel messaging and applied AI together in one browser-based system — giving contact centres complete control of every customer interaction, from first dial to final disposition.

One system instead of six

Most contact centres run a separate outbound calling system, a phone system, a messaging tool, a recording archive, a QA spreadsheet and a reporting stack — none of which talk to each other. Apex replaces all of them. Outbound dialling, inbound queues, SMS, WhatsApp, email, call recording, AI transcription, automated quality scoring, live wallboards and 50+ reports all share the same data, the same agents and the same login. Nothing to install, nothing to reconcile, and one number that everybody trusts.

What Apex Delivers

SIX CORE OUTCOMES

01 Agent Productivity

Predictive dialling and SmartDial strategies keep agents talking to the right people. Idle time drops, conversations per hour rise, and every shift is worth more.

02 Intelligence as Standard

Every call is transcribed, sentiment-scored, summarised and quality-scored automatically. Insight is built in, not sold as an add-on module.

03 True Omni-Channel

Voice, SMS, WhatsApp, email, live chat and web forms are handled in one agent workspace and reported through one set of dashboards.

04 Complete Visibility

Live wallboards, real-time agent and campaign monitors and a deep historical report suite mean nobody has to guess what happened today.

05 Compliance & Assurance

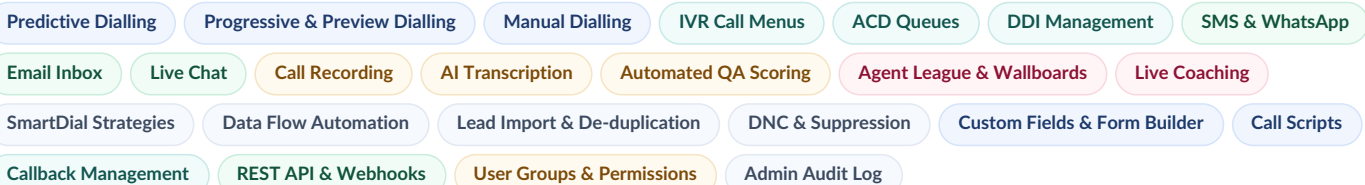
100% call recording, DNC and suppression management, automated QA scoring and a full admin audit trail keep you evidence-ready at all times.

06 Motivation & Retention

The built-in Agent League turns daily KPIs into levels, milestones and leaderboards — making progress visible and keeping good agents engaged.

One Platform, Every Discipline

INCLUDED AS STANDARD



Browser
NO INSTALLS

6
CHANNELS

50+
REPORTS

100%
RECORDED

AI
AUTO QA

Live
WALLBOARDS

Built For

OUTBOUND, INBOUND AND BLENDED

▶ Outbound Sales Teams

High-volume dialling with predictive pacing, SmartDial lead blending, caller-ID health monitoring and disposition-driven automation that recycles data without anyone touching a spreadsheet.

▶ Inbound Service Teams

IVR menus, ACD queues, DDI routing and callback scheduling, backed by service-level, abandon-rate and hour-of-day demand reporting that tells you exactly when to staff.

▶ Blended Operations

Agents move between outbound campaigns, inbound queues and messaging channels in the same session, with every interaction landing in one shared reporting and quality framework.

Scales with your ambition

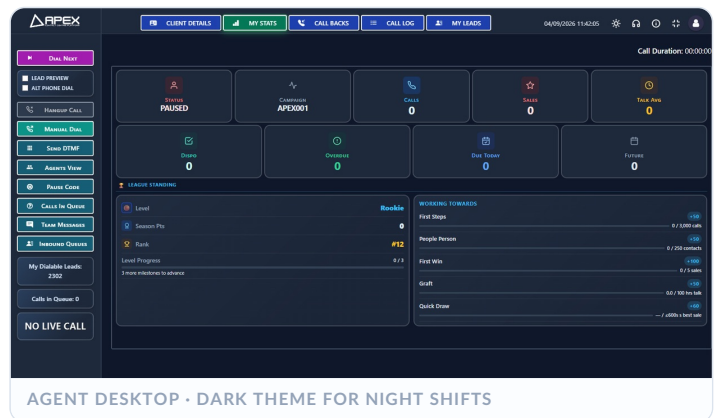
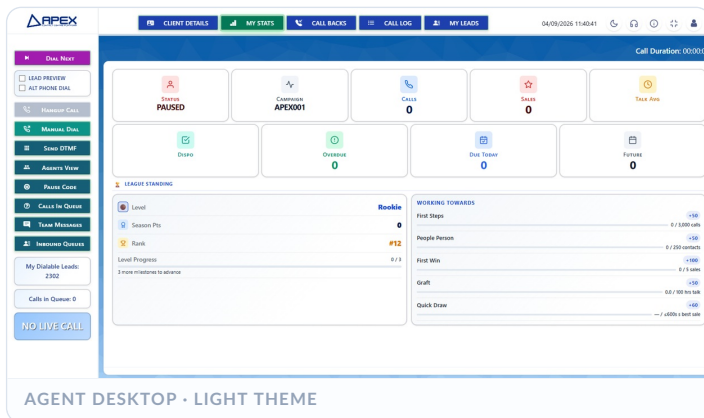
Whether you are running a ten-seat outbound sales team or a multi-site, multi-channel operation of several hundred agents, Apex behaves the same way — one deployment, one set of reports, one place to make changes. Campaigns, queues, user groups and permissions are all configured through the manager interface, so the platform grows with the business instead of being rebuilt around it.

Adding a campaign, a queue, a channel or a whole new team is a configuration change, not a project. And because every part of the platform writes to the same data, a new team appears in the existing reports, wallboards and quality framework from its first call.

FEATURE 01

One Screen. Every Tool the Agent Needs.

The Apex agent desktop runs entirely in the browser. There is no softphone to install, no headset driver to configure and no desktop client to update — an agent signs in, selects a campaign and starts taking calls, whether they are in the office or at home.



Built Around the Conversation

EVERYTHING ONE CLICK AWAY

Browser Softphone

Audio runs through the browser using open web standards — no plug-ins, no hardware phones and no VPN. Agents work from anywhere with a headset and a connection.

Client Details & Scripts

The customer record, call script and web form all appear the moment the call connects, with live variable substitution filling in names, addresses and account data automatically.

Dispositions & Callbacks

Wrap-up codes are configured per campaign. Agents disposition in one click and schedule callbacks for a date, time and owner without leaving the call screen.

My Stats & League Standing

Agents see their own calls, sales, talk average and callback pipeline live — plus their league level, season points, rank and the milestones they are working towards.

My Leads & Call Log

A personal view of assigned leads, dialable record counts and full call history, so agents can pick up where they left off and chase their own pipeline.

Team Messages & Queues

Internal messaging to supervisors and colleagues, plus a live view of inbound queue depth — all inside the platform, with no external chat tool required.

Scripts, Forms & Data Capture

CONFIGURED BY YOU, NOT BY US

Dynamic Call Scripts

Scripts are written and edited in the manager with a live preview and an insert-variable picker. Customer name, address, account data and the agent's own name drop into the wording automatically, so agents read a personalised script rather than a template full of placeholders.

Customisable Web Forms

Each campaign gets its own on-call form built from your own fields — avatar, script panel, survey, disposition controls, transfer buttons, call history, messaging and recordings can all be switched on or off per campaign.

Surveys & Custom Fields

A drag-and-drop form builder creates structured data capture without development work. Answers are stored against the lead, exportable, reportable and usable as triggers for follow-up automation.

Agent Controls

- ✓ **Dial Next** for predictive and progressive campaigns, with lead preview and alternate phone dialling as optional per-agent settings
- ✓ **Manual dial** for sensitive or high-value contacts, with number entry and DTMF send
- ✓ **Pause codes** let agents record break type — lunch, meeting, training, comfort — so unproductive time is explained, not just counted
- ✓ **One-click transfer** to a supervisor, colleague, inbound queue or external number
- ✓ **Agents view** shows who else is online and available for a warm transfer
- ✓ **Light and dark themes** reduce eye strain on long or overnight shifts
- ✓ **Calls in queue** and dialable lead counts are always on screen, so agents can see the shape of their own day

Nothing to install, nothing to break

Because the agent desktop is delivered as a web application, rolling out a change takes minutes rather than a deployment cycle. New starters need a browser and a login — no build, no image, no IT ticket.

That also makes homeworking and hybrid shifts genuinely practical: the same screen, the same recording, the same supervision and the same reporting, wherever the agent sits.

Zero

SOFTWARE INSTALLS

Any

LOCATION

1

LOGIN

6

CHANNELS

Live

OWN STATS

2

THEMES

FEATURE 02

High-Performance Outbound Dialling

Apex drives outbound productivity with intelligent pacing, flexible campaign management and live controls that keep agents on the phone. Every dialling parameter can be changed while the campaign is running — no restart, no downtime, no waiting for a change window.

Four Dialling Modes, Switchable Per Campaign

01 Predictive

Apex paces ahead of your agents at a configurable ratio, so a connected customer is waiting the moment an agent becomes free. Best for high-volume campaigns.

02 Progressive

One call placed per available agent. Maximum contact rate with no abandoned-call exposure — the safe default for regulated or brand-sensitive campaigns.

03 Preview

The agent sees the record before the call is placed and chooses when to dial. Ideal for high-value accounts, renewals and complex B2B conversations.

04 Manual

Full agent control for follow-ups, callbacks and outbound customer service, with every manual call recorded and reported exactly like a dialled one.

Campaign Control

- ✓ **Live dial-level adjustment** — raise or lower the pacing ratio from the supervisor dashboard and see the effect within seconds
- ✓ **Hopper management** with live depth visibility; load or reset a campaign's dialling queue manually at any time
- ✓ **Dial status filtering** defines exactly which lead outcomes re-enter the queue and how many attempts each record gets
- ✓ **Abandoned-rate monitoring** with configurable thresholds that protect compliance automatically
- ✓ **Time-zone aware dialling** restricts calls to permitted local hours based on the lead's own geography
- ✓ **Multiple concurrent campaigns** run independently from one platform, each with its own data, scripts, dispositions and caller IDs

Caller ID & Contact Strategy

- ✓ **Multiple caller IDs per campaign** with rotation, so outbound presence is spread rather than concentrated on one number
- ✓ **Caller-ID health monitoring** tracks answer and connect performance per number and flags numbers that are degrading
- ✓ **Attempt distribution reporting** shows exactly how much value each dial attempt adds — and where the productive tail ends
- ✓ **Hour-of-day and day-of-week analysis** identifies the windows that actually convert for each campaign and data set
- ✓ **Per-campaign dispositions** with sale and contact flags that drive reporting, automation and quality scoring
- ✓ **Call recording on every call**, inbound or outbound, dialled or manual

The Agent's Outbound Experience

Zero Dead Air

The customer record, script and web form are already on screen when the agent is connected, so the conversation starts immediately instead of with an apology.

Guided Wrap-Up

Per-campaign disposition codes, callback scheduling and required-field validation mean the outcome of every call is captured consistently by every agent.

Live Coaching

Supervisors can silently monitor any active call or whisper-coach the agent so only they can hear — real-time development without interrupting the customer.

Compliance Built Into the Dial

- ✓ **DNC scrubbing** at system, campaign and list level, applied before a record ever reaches the dialling queue
- ✓ **Suppression lists** maintained automatically per list, with download and audit export
- ✓ **Permitted calling hours** enforced per campaign and per dialling rule, by day and by time range
- ✓ **Consent and outcome evidence** retained against the lead record for the life of the campaign
- ✓ **Campaign-level caller ID** so each brand or client presents its own number
- ✓ **Attempt limits** per record stop data being over-dialled and protect contact quality
- ✓ **Answer machine detection** keeps agents off dead calls and out of voicemail
- ✓ **100% recording** with agent, campaign and lead metadata retained as an evidence trail
- ✓ **Full admin audit log** records who changed which campaign setting, and when
- ✓ **IP and user-group restrictions** limit who can reach Apex and from where

Live campaign monitoring while the campaign runs

The real-time campaign monitor shows calls in progress, agents in each status, hopper depth, current dial level, answer rate and abandon rate — refreshing automatically. Alongside it, campaign status statistics break down disposition distribution across six rolling windows: today, the last six hours, the last hour, fifteen minutes, five minutes and one minute. A supervisor can see a shift in call outcomes as it starts happening and correct pacing, data or coaching before the day is lost.

The same figures feed the agent wallboards, so the floor and the supervisor are always looking at one version of the truth.

4

DIALLING MODES

Live

PACING CONTROL

6

STAT WINDOWS

CID

HEALTH TRACKING

TZ

TIME-ZONE SAFE

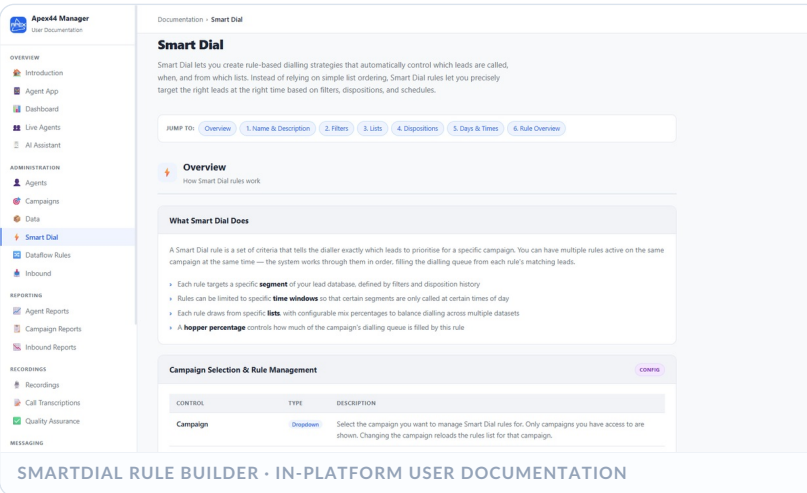
100%

RECORDED

FEATURE 03

Dial Smarter. Let the Data Move Itself.

Two engines sit behind every Apex campaign. SmartDial decides which record an agent should speak to next. Data Flows decide what happens to that record afterwards. Together they remove almost all of the manual list management that normally eats a team leader's day.



Documented inside the platform

Apex ships with a complete user guide built into the manager — every page, field and option explained, with its own navigation and search. New supervisors can answer their own questions on day one.

That matters for a feature like SmartDial: the rules are powerful, so the documentation, live match counts and preview tools are there to make them safe to use.

SmartDial — Dial the Right Record First

RULE-BASED DIALLING STRATEGY

01 Blend Lists by Priority

One campaign can draw from many lead lists at once, each with its own priority and percentage share of the dialling queue — fresh, aged and recycled data mixed to a deliberate recipe.

02 Target by Filter

Rules select records by field value, disposition history, attempt count and geography — and live match counts show how many records a rule will pick up before you switch it on.

03 Call at the Right Time

Every rule has its own calling windows by day and by time range, so working-hours, evening and weekend data are only ever dialled during the hours when they actually answer.

Data Flows — Automation on Every Outcome

RUNS EVERY MINUTE

Triggers — when a rule fires

- ✓ A lead reaches a **specified disposition** or status
- ✓ A lead passes a **call-attempt threshold**
- ✓ A record reaches a **date or age condition**
- ✓ A lead belongs to a **particular list or campaign**

Actions — what it does next

- ✓ **Move** the lead to a different list, or **change its status**
- ✓ Send a personalised **SMS or WhatsApp** message
- ✓ Send a **templated HTML email**
- ✓ **Schedule a callback**, or **call an external API** by webhook

The Lifecycle of a Record

HANDS-OFF FROM IMPORT TO OUTCOME

1

Import

CSV or Excel, mapped

2

De-duplicate

System, campaign, list

3

DNC Scrub

Suppression applied

4

SmartDial

Queued by rule

5

Conversation

Script and form

6

Disposition

Outcome recorded

7

Data Flow

Action fires

8

Reported

Stats and QA

Multiple actions, one rule, full audit trail

A single Data Flow rule can fire several actions at once — move the record, change its status, text the customer and notify your CRM, all from one outcome. Flows are evaluated every minute, every action is written to an audit log, and the manager dashboard shows today, seven-day, thirty-day and all-time execution counts for every rule. You always know your automation is running, and you can prove what it did.

Import & Mapping

CSV and Excel import with a column mapper, saved mapping templates and a preview before commit.

Duplicate Rules

Configurable duplicate checking at system, campaign and list level, applied as records load.

DNC & Suppression

System-wide and per-campaign do-not-call management, with downloadable suppression files.

∞

LISTS PER CAMPAIGN

%

MIX CONTROL

7

ACTION TYPES

60s

FLOW CYCLE

Live

MATCH COUNTS

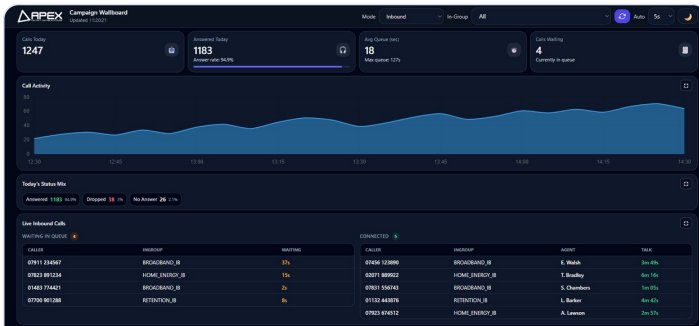
Full

AUDIT LOG

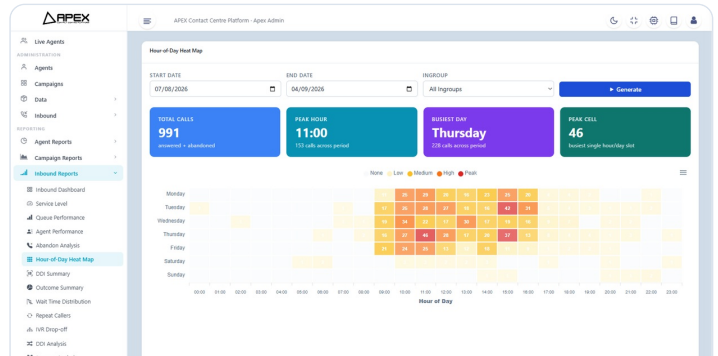
FEATURE 04

Answer Faster. Route Smarter. Staff Properly.

Apex handles inbound as a first-class channel, not an afterthought. IVR menus, ACD queues, DDI-level routing and callback handling are configured in the same manager as your outbound campaigns — and reported with the service-level detail an inbound operation actually needs.



LIVE INBOUND WALLBOARD • QUEUE, ANSWER RATE AND CONNECTED CALLS



HOURLY-OF-DAY HEAT MAP • DEMAND BY DAY AND HOUR

Call Handling & Routing

- ✓ **IVR call menus** route callers to the right destination first time, with nested menus and per-option destinations
- ✓ **ACD queues** with priority routing, overflow rules, announcements and configurable wait behaviour
- ✓ **DDI management** assigns each inbound number to its own menu, queue or campaign
- ✓ **Skills and group access** control which agents can receive which queues
- ✓ **Warm and cold transfer** to colleagues, queues or external numbers
- ✓ **Callback scheduling** from an inbound call, owned by an agent or the whole team

Inbound Reporting Suite

Service Level & Queues

Service-level attainment, queue performance and wait-time distribution, by queue and by interval.

Abandon Analysis

Where and when callers give up, how long they waited first, and which queues are losing them.

Hour-of-Day Heat Map

Demand mapped across every hour and weekday, with peak hour, busiest day and busiest single slot.

DDI Summary & Analysis

Volume, answer rate and outcome by inbound number — so marketing spend can be judged by phone response.

IVR Drop-Off

Where callers leave the menu tree, so confusing or unnecessary options can be removed.

Repeat Callers

Who is calling back and how often — the clearest available measure of first-contact resolution.

Callbacks, Transfers & Continuity

Scheduled Callbacks

Callbacks can be booked from any call and owned by the original agent or the whole team, with a manager view of everything pending, overdue and due today.

Transfer Handling

Transfers between agents, queues and external numbers are logged as part of the same customer journey, with recordings for each leg of the call.

Full Contact History

Every call, message and email against a customer record is visible to the agent on screen, so nobody has to ask the caller to explain themselves twice.

IVR

MENU ROUTING

ACD

QUEUE PRIORITY

DDI

NUMBER LEVEL

SLA

SERVICE LEVEL

Live

QUEUE VIEW

100%

RECORDED

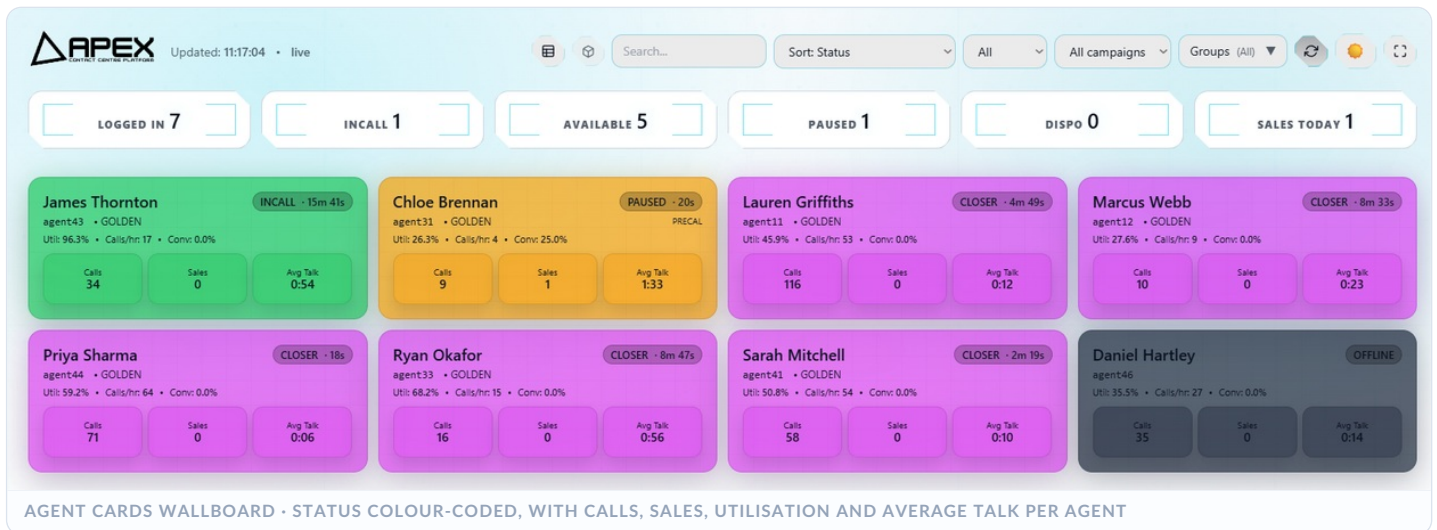
Inbound and outbound in one operation

Because both channels live in the same platform, a blended agent can take queue calls between outbound conversations, and a supervisor sees one combined picture of the day. Recordings, transcripts, quality scores, league points and reporting all work identically whichever direction the call came from.

FEATURE 05

See the Floor, Not Yesterday's Report

Apex gives supervisors live, self-refreshing views of every agent and every campaign — plus full-screen wallboards built to run unattended on a wall display. Problems become visible while there is still a shift left to fix them.



ROW VIEW • SORTABLE BY STATUS, UTILISATION, CALLS PER HOUR OR CONVERSION

AGENT	CAMPAIGN	STATUS	UTIL %	CALLS/HR	CONV %	CALLS	SALES	AVG TALK
James Thornton (agent43)	GOLDEN	INCALL - 15m 41s	96.3%	17	0.0%	34	0	0:54
Priya Sharma (agent44)	GOLDEN	INCALL - 1s	59.3%	63	0.0%	69	0	0:06
Chloe Brennan (agent31)	GOLDEN	CLOSER - 7m 58s	26.3%	4	25.0%	9	1	1:37
Lauren Griffiths (agent11)	GOLDEN	CLOSER - 4m 24s	45.9%	53	0.0%	116	0	0:12
Marcus Webb (agent12)	GOLDEN	CLOSER - 8m 08s	27.6%	9	0.0%	10	0	0:23
Ryan Okafor (agent33)	GOLDEN	CLOSER - 8m 22s	68.2%	15	0.0%	16	0	0:56
Sarah Mitchell (agent41)	GOLDEN	CLOSER - 1m 54s	50.8%	54	0.0%	58	0	0:10
Daniel Hartley (agent46)	—	OFFLINE	35.5%	27	0.0%	35	0	0:14

Two views, one wallboard

The same live data renders as colour-coded agent cards for the floor display, or as a dense sortable table for a supervisor's second monitor. Filter by campaign, user group or agent, choose the sort, and leave it running — it refreshes itself.

Header counters always show logged in, in call, available, paused, in wrap-up and sales today, so the state of the operation reads at a glance from across the room.

Live Monitors

AUTO-REFRESHING, NO PAGE RELOADS

Live Agents

Status, current campaign, talk time, pause time and pause reason for every logged-in agent, with drill-down into any individual.

Live Campaigns

Calls in progress, dial level, hopper depth, answer rate and abandon rate per campaign, updating automatically.

Campaign Dashboard

Live campaign stats with per-list breakdowns, so you can see which data is carrying the day and which is dragging.

Coaching & Intervention

- ✓ **Silent monitoring** — listen to any live call without the agent or customer knowing
- ✓ **Whisper coaching** — talk to the agent mid-call so only they can hear you
- ✓ **Coaching log** records which sessions took place, with whom and when
- ✓ **Force logout** clears a stuck or absent agent from Apex, with a full audit trail of who did it

Displays for the Floor

- ✓ **Agent cards wallboard** — one colour-coded tile per agent, ideal for a large screen
- ✓ **Campaign wallboard** — outbound and inbound modes with live queue and call detail
- ✓ **League wallboard** — the monthly agent leaderboard as a TV display (*page 8*)
- ✓ **Light and dark modes** plus full-screen, so displays suit the room they live in

Pre-aggregated, so live views stay fast

Apex pre-calculates today's agent and campaign statistics in the background rather than re-querying the full call history every time a dashboard refreshes. That is why wallboards can update every few seconds across dozens of agents without slowing the platform down for the people actually taking calls — and why reporting heavy enough to answer real questions never competes with live dialling.

Live

AGENT STATUS

10s

STAT REFRESH

3

WALLBOARD APPS

Whisper

LIVE COACHING

Silent

MONITORING

Audit

EVERY ACTION

FEATURE 06

Make Progress Visible. Keep Good Agents.

The Agent League turns everyday KPI activity into levels, milestones and a live leaderboard. It resets on the first of every month so nobody is ever out of the running, and a persistent career rank recognises agents who perform season after season.

September 2026 Day 4 13% through the month 28 days left 11:36:42

470 CALLS TODAY 48 CONTACTS TODAY 1 LEADS TODAY 4h 39m TALK TIME TODAY

	Chloe Brennan	Lauren Griffiths	Sarah Mitchell	Priya Sharma	Daniel Hartley	James Thornton	Ryan Okafor	agent14	Marcus Webb	Agent 47
CALLS	39	148	80	83	54	36	19	0	11	0
CONTACTS	19	24	4	0	0	0	0	0	1	0
LEADS	1	0	0	0	0	0	0	0	0	0
TALK	37m 5s	52m 24s	27m 4s	17m 16s	20m 5s	1h 23m	34m 0s	—	7m 56s	—
BASE	260	437	191	175	117	104	50	0	35	0
BONUS	0	0	0	0	0	0	0	0	0	0
TODAY	260	437	191	175	117	104	50	0	35	0
TODAY #	#2	#1	#3	#4	#5	#6	#7	#8	#9	#10
SEASON	3,468	3,326	2,171	1,694	1,386	1,356	774	660	287	168
SEASON #	#1	#2	#3	#4	#5	#6	#7	#8	#9	#10

ALSO COMPETING: 19 pts #11 agent13 0 leads 19 pts #11

A fresh season every month

The league resets completely on the 1st, so a slow month is never permanent and new starters are not competing against a year of accumulated points.

Within the month, agents climb five levels by completing milestones. Higher levels earn points **faster** through a multiplier rather than just receiving a one-off bonus, so the gap between a Rookie and a Legend is real.

Total points = (base points × level multiplier) + milestone bonuses.

LEAGUE WALLBOARD • FULL-SCREEN TV DISPLAY FOR THE FLOOR, ROWS ANIMATE AS STANDINGS CHANGE

Levels, Points & Milestones

FULLY CONFIGURABLE, NO CODE

Five Levels Per Season

LEVEL	MULTIPLIER	TO ADVANCE
1 • Rookie	1.00×	3 of 5
2 • Contender	1.15×	3 of 5
3 • Pro	1.30×	3 of 5
4 • Elite	1.50×	3 of 5
5 • Legend	2.00×	Top tier

Daily KPI Scoring

SCORED ACTIVITY	DEFAULT POINTS
Calls made	2 per call
Contacts reached	5 per contact
Sales	20 per sale
Talk time	1 per 5 min
Login time	1 per 10 min

Apex Agent League — August 2026

RANK	AGENT	LEVEL	POINTS	BASE	BONUS	TODAY	# BEST SALE	TREND
1	Lauren Griffiths	Pro	17,580	16,490	+1,090	386	8m 23s	▲
2	James Thornton	Gold	11,548	10,638	+910	97	24 - 0	—
3	Agent 42	Gold	10,553	9,643	+910	—	53s	—
4	agent13	Platinum	9,358	8,388	+1,070	—	1m 52s	—
5	Chloe Brennan	Gold	7,991	7,081	+1,010	201	25m 47s	—
6	Daniel Hartley	Silver	7,779	7,369	+410	77	1m 43s	—
7	Ryan Okafor	Silver	7,430	7,230	+200	48	15m 24s	—
8	agent14	Gold	7,017	5,987	+1,030	—	1m 43s	▲
9	Sarah Mitchell	Silver	6,304	6,154	+150	163	17m 54s	▼
10	Priya Sharma	Silver	5,283	5,233	+50	161	34m 21s	—

LEAGUE TABLE • RANK, LEVEL, POINTS AND CAREER BADGE

Agent League — Admin Settings

Milestone Configuration

Edit milestone names, target values and bonus points per level. Agents complete **N** milestones from their current level to advance (set in Levels tab).

NAME	DESCRIPTION	KPI	PERIOD	TARGET	BONUS PTS	ACTIVE
First Steps	Make 3,000 calls this month	calls	monthly total	3000.00	50	☒
People Person	Make 250 contacts this month	contacts	monthly total	250.00	50	☒
First Win	Send 5 leads this month	sales	monthly total	5.00	100	☒
Graft	Accumulate 1h40m of talk time in a single day	talktime	single day	100.00	50	☒
Quick Draw	Close a lead in under 10 minutes	shortest-lead	single call	600.00	60	☒

ADMIN • 25 MILESTONES, FIVE PER LEVEL, FULLY EDITABLE

Career Rank — Recognition That Carries Over

PERSISTENT ACROSS EVERY SEASON

Bronze

The starting rank for every new agent

Silver

A top-ten finish, or three seasons played

Gold

A top-three finish in any season

Platinum

A first-place finish in any season

Deliberately designed not to be gamed

Closing a sale quickly is **not** continuously scored — it counts only towards milestones and appears as a personal-best figure — because rewarding speed on every call would push agents to rush customers. Sale and contact outcomes are picked up automatically from whichever dispositions you have flagged as a sale or a human answer, so the league always scores the same definitions your reports use. Point values, milestone targets, level names, multipliers and the number of milestones needed to advance are all editable in the admin screens, and a season can be recalculated at any time.

FEATURE 07

Record Everything. Review What Matters.

Every call is recorded, transcribed, sentiment-scored and summarised automatically — then scored against your own quality criteria without a reviewer having to listen to it first. Your call archive stops being storage and starts being a coaching tool.

QA Rating Transcriptions

0:00 / 32:58

[Download Recording](#) [PDF](#)

SPEAKER 1 00:01
w that's completely fine parminster i've got that yes just give me a moment while i just write it down in the form mmmm okay and what's your nationality

SPEAKER 2 00:19
i'm british

SPEAKER 1 00:20
british that's completely fine and do you normally live in the great britain

SPEAKER 2 00:38
sorry

SPEAKER 1 00:39
do you live in the great britain yes yes yeah and have you been outside of the uk in the last four in the last three years four weeks

SPEAKER 2 00:45
for four weeks i go to india

SPEAKER 1 00:46
india about their nationality fine but also not a resident

QA Metrics

Intro AI
Sales Intro Message
No clear sales intro message delivered at call start; agent jumps directly into verification questions. ★★☆☆☆

Polite AI
Agent was polite throughout call.
Agent consistently polite, patient with language barrier, uses reassuring language throughout. ★★★★★

Terms
Terms and Conditions read out. ★★★★★

QA Notes
No clear sales intro message delivered at call start; agent jumps directly into verification questions.
Agent consistently polite, patient with language barrier, uses reassuring language throughout.

QA REVIEW · TRANSCRIPT SYNCHRONISED TO AUDIO, AI SCORE AND REASONING PER METRIC

Quality assurance at full coverage

Traditional QA samples a handful of calls per agent per month, which means most coaching decisions rest on a fraction of a percent of the evidence.

Apex scores **every** transcribed call against your criteria automatically. Supervisors spend their time reviewing the calls that were flagged, agreeing or overriding the scores, and coaching — not hunting for something to listen to.

Each metric records who scored it, the score, and a written reason.

Call Recording

- ✓ **100% of calls recorded** automatically, inbound and outbound, with no per-agent setup
- ✓ **In-browser playback** — no download needed to listen to a call
- ✓ **Search** by agent, phone number, date range, campaign, disposition, surname or postcode
- ✓ **Download** individual recordings, or export in bulk for a compliance request
- ✓ **Linked to the lead record**, so a customer's full call history is always one click away
- ✓ **Configurable retention** with secure server-side storage
- ✓ **Every leg recorded** on a transferred call, not just the first conversation
- ✓ **Bulk export** of recordings and transcripts for a regulator or client audit

Transcription & Analysis

- ✓ **Automatic transcription** of every completed call by neural speech recognition
- ✓ **Speaker separation** labels who said what, turn by turn
- ✓ **Sentiment scoring** tracks emotional tone across the conversation
- ✓ **AI call summary** condenses a thirty-minute call into a readable paragraph
- ✓ **Profanity detection** counts and flags calls that need escalating
- ✓ **Click-to-seek transcripts** — select any line to jump the audio to that moment
- ✓ **Queue visibility** — see which recordings are waiting to be transcribed, and when
- ✓ **Searchable archive** — the whole back catalogue becomes queryable text, not just audio

Automated Quality Assurance

YOUR CRITERIA, YOUR WEIGHTINGS

Campaign Settings

Campaign Calling Inbound Transfers Webforms/URLs **QA Score Options** Multiple Caller ID

Description	Explanation/Guidance	Active	Weighting	Order	
Intro	Sales Intro Message	Y	1	1	Remove
Polite	Agent was polite throughout call	Y	1	2	Remove
Terms	Terms and Conditions read out	Y	2	3	Remove

Add a new Metric using this form below

[Add](#)

QA CRITERIA ARE DEFINED PER CAMPAIGN, WITH GUIDANCE TEXT, WEIGHTING AND ORDER

AI Scoring, Human Override

- ✓ Define your own scoring dimensions and weight each one
- ✓ Every AI score carries a written reasoning note
- ✓ Supervisors can agree with or override any score
- ✓ Both the AI and human score are retained for audit
- ✓ Restrict QA by call type, sale status or minimum duration
- ✓ Score a whole campaign, or re-run scoring after a criteria change

Find Any Conversation

Search transcripts by keyword, agent, campaign, customer surname, postcode or QA status — evidence in seconds rather than an afternoon of listening, and proof rather than recollection.

Escalate by Exception

Profanity counts, sentiment dips and low QA scores surface the calls that need attention, so supervisor time goes where the risk actually is instead of where the sampling happened to land.

Evidence Trail

Recordings keep their agent, campaign and lead metadata, giving a complete trail for regulatory, compliance and dispute purposes, for as long as your retention policy requires.

100%
RECORDED

100%
TRANSCRIBED

AI
SCORED

Both
AI & HUMAN

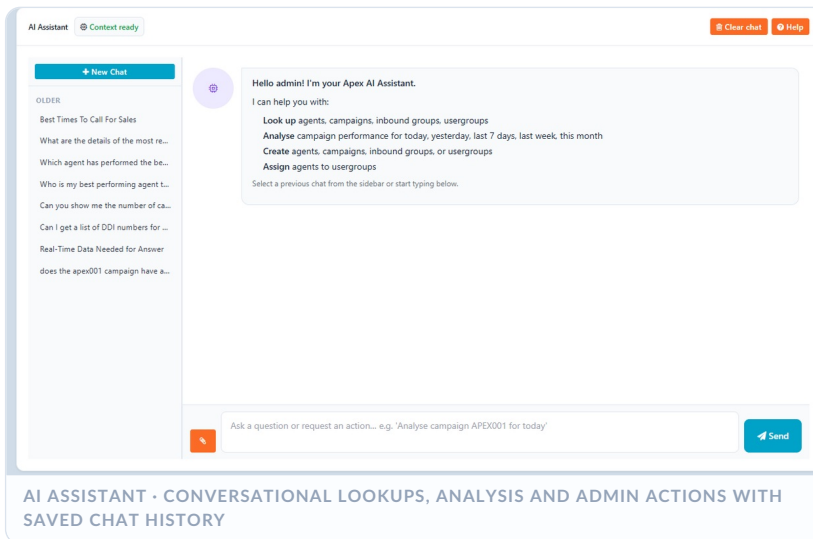
Sync
AUDIO & TEXT

Full
AUDIT TRAIL

FEATURE 08

Ask Apex Anything About Your Operation

The Apex AI Assistant sits inside the manager interface with live access to your own data. Ask a question in plain English and get an answer grounded in today's figures — or hand it an administrative job and let it do the work.



Grounded in your data, not generic

The assistant is given live context before it answers: today's agent statistics, campaign dialling figures, active campaigns, inbound groups and your disposition codes.

So "who was the top agent this week?" returns your actual top agent — not a plausible-sounding guess. Every chat is saved, so a question asked on Monday can be revisited on Friday.

Three Things It Does

01 Look Up & Analyse

Agents, campaigns, inbound groups and user groups, plus performance analysis for today, yesterday, the last seven days, last week or this month.

02 Create & Assign

Create agents, campaigns, inbound groups and user groups through conversation, with a confirmation step before anything is written and a full audit entry after.

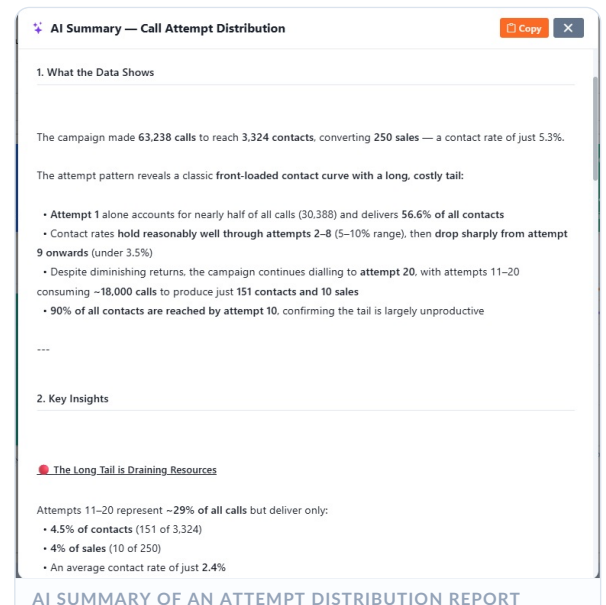
03 Import Leads

Attach a file, describe the campaign, and the assistant maps the columns, runs duplicate checks and imports the records conversationally.

One-Click AI Summaries on Reports

Reports throughout the manager carry an **AI Summary** button. Instead of reading a grid of numbers, you get a written analysis of what the data shows, the key insights, and where the money is going — in the same language you would use to explain it to the board.

- ✓ Identifies the pattern, not just the totals — *"a front-loaded contact curve with a long, costly tail"*
- ✓ Quantifies waste — which dial attempts consume calls but produce almost no contacts or sales
- ✓ Highlights the threshold that matters, such as the attempt by which 90% of contacts are reached
- ✓ Copyable and shareable, so analysis can go straight into a meeting pack
- ✓ Available on the reports where it earns its keep — attempt distribution, campaign performance, list analysis and agent comparison



Questions Managers Actually Ask

How many calls did we make today?

Who was the top agent this week?

What is the drop rate on this campaign?

Best times to call for sales?

Which list is converting worst?

Show me the DDI numbers for this group

Create a new agent in this user group

Analyse this campaign for yesterday

How did the team do last week?

What is our average talk time today?

Add these agents to a usergroup

Live

DATA CONTEXT

Chat

PLAIN ENGLISH

Write

ADMIN ACTIONS

1

CLICK SUMMARIES

Saved

CHAT HISTORY

Audit

EVERY CHANGE

FEATURE 09

Meet Customers Where They Are

Voice is where most contact centres start and stop. Apex treats messaging as a first-class channel — the same agents, the same customer record, the same supervision and the same reporting, whether the conversation happens on the phone or in a text thread.

Voice

Inbound and outbound, fully recorded

SMS

Two-way, with templates

WhatsApp

Managed templates

Email

Threaded conversations

Live Chat

Session-managed inbox

Web Forms

On-call data capture

SMS & WhatsApp Inbox

A shared messaging inbox with full session management. Agents pick up, reply to, assign or transfer conversations; supervisors see every open

session and a live count of what is waiting. Templated messages carry personalised variable substitution for high-volume outreach, and WhatsApp templates are created and managed centrally without leaving the platform.

Email Conversations

Inbound and outbound email handled in the agent workspace with conversation threading, an HTML template editor and delivery-status

tracking. Email sits on exactly the same footing as voice — routed to agents, assignable, transferable, searchable and reported through the same cross-channel dashboards.

Web Forms & Data Capture

Every call surfaces a customisable web form populated live from the lead record, with survey capture, custom fields, disposition controls and transfer buttons — configured per campaign, no third-party form tool required.

Internal Agent Messaging

Agents, team leaders and supervisors message each other inside the platform. Conversations are logged and searchable, which keeps operational chatter inside your secure environment instead of on a consumer chat app.

How an Inbound Message Is Handled

SAME DISCIPLINE AS A QUEUED CALL

1

Arrives

SMS, chat or email

2

Matched

To the lead record

3

Queued

New session created

4

Assigned

To an available agent

5

Handled

Reply or transfer

6

Logged

Searchable history

7

Reported

Cross-channel stats

Unified Reporting

One messaging performance report aggregates SMS, WhatsApp, email and chat into a single view of total engagement — not just calls.

Response Times

Session duration, first-response and agent response times per channel, so messaging gets the same service-level scrutiny as the phone.

Template Library

Central SMS, WhatsApp and email template management with active/inactive control and per-template content editing.

Session Handling

- ✓ **Assign, transfer and reassign** any conversation between agents mid-thread
- ✓ **Live session counters** show supervisors what is new, open and waiting
- ✓ **Automatic lead matching** ties inbound messages to the existing customer record
- ✓ **Full thread history** travels with the conversation, so a new agent has the context
- ✓ **Agent search** finds the right colleague to transfer to by name or user group

Control & Compliance

- ✓ **Approved templates only** where required, so outbound wording stays compliant
- ✓ **Every message logged** and searchable by number, agent, campaign or date
- ✓ **Delivery status tracked** per message, with failures visible rather than silent
- ✓ **Opt-out handling** feeds straight into suppression, across every channel
- ✓ **Permissions control** which user groups can send on which channel

6

CHANNELS

2-Way

MESSAGING

1

AGENT WORKSPACE

Auto

LEAD MATCHING

Live

SESSION VIEW

Full

MESSAGE LOG

Bulk Outreach

Send a personalised templated message to a whole list or segment, then handle the replies as normal two-way conversations in the shared inbox.

Reminders & Nudges

Appointment confirmations, callback reminders and renewal prompts fire automatically from a Data Flow rule instead of an agent's to-do list.

Cheaper Follow-Up

A message costs a fraction of a call attempt. Moving low-value follow-ups to messaging frees agent hours for the conversations that convert.

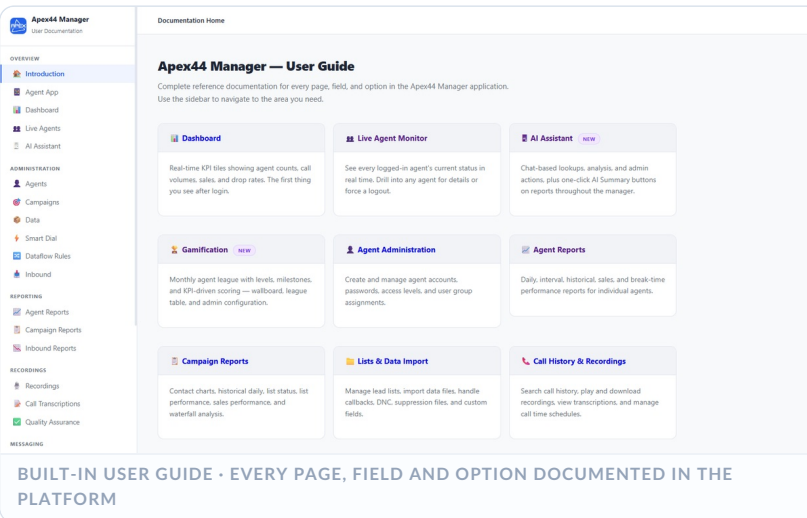
Automation joins the channels together

Data Flows connect a call outcome to every other channel. A specific disposition can send a follow-up SMS, dispatch a templated email, move the lead to a nurture list and notify your CRM — all from one rule, all logged, all without an agent remembering to do it. Messaging stops being a separate team with separate numbers and becomes part of the same contact strategy.

FEATURE 10

Everything Reported. Everything Auditable.

More than fifty manager reports cover agents, campaigns, inbound queues, messaging, recordings and quality — all filterable, exportable and backed by a complete administrative audit trail.



Documented and supportable

Apex ships with its own complete user guide, navigable and searchable inside the manager. Supervisors and team leaders can answer their own questions without raising a ticket or waiting for training.

Combined with the audit log, that means a change made at nine o'clock can be understood, explained and — if necessary — reversed by someone else at ten.

The Report Library

50+ REPORTS, ALL FILTERABLE AND EXPORTABLE

Agent Performance

Daily, interval and historical performance, activity logs, status distribution, sales conversion, agent-versus-agent comparison and break-time analysis.

Campaign Performance

Historical trends, dialling statistics, disposition trend, attempt distribution, sales performance and campaign heat maps.

Inbound & Service Level

Service level, queue performance, abandon analysis, wait-time distribution, repeat callers, IVR drop-off and DDI analysis.

Data & List Reports

List statistics, campaign list performance, single-list deep analysis, hopper status and suppression reporting.

Messaging Reports

SMS, WhatsApp, chat and email volume, delivery metrics, session duration and agent response times across every channel.

Quality & Audit

QA score reporting, transcript search, transcription queue status, agent login activity and the full admin action audit log.

Administration & Security

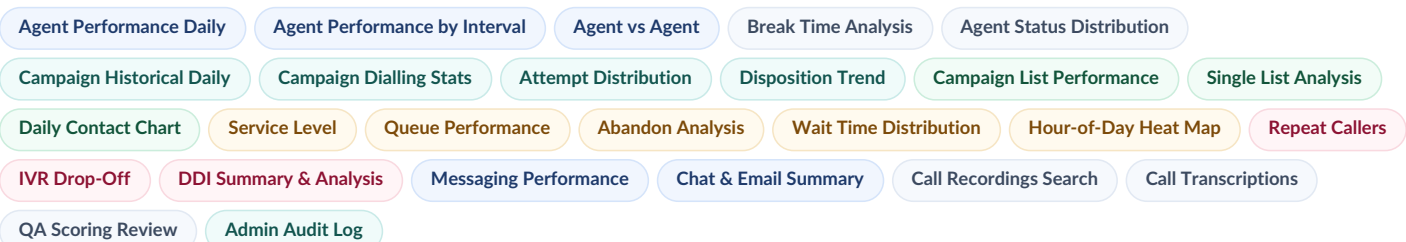
- ✓ **User groups** with granular, per-function permissions
- ✓ **IP-based access restriction** per user group
- ✓ **Campaign-level access control** — agents and supervisors see only their own operation
- ✓ **Admin audit log** recording who changed what, and when
- ✓ **Session timeouts** and level-based menus limit exposure
- ✓ **Bulk configuration tools** for updating campaigns and lists together

Integrations & API

- ✓ **REST API** for leads, calls, agents and campaign data
- ✓ **Outbound webhooks** fire on any call outcome via Data Flows
- ✓ **Connect any CRM** or business system that accepts an HTTP POST or GET
- ✓ **Inbound lead injection** from web forms, landing pages and partners
- ✓ **CSV and Excel** import and export throughout the platform
- ✓ **Delivery-status callbacks** keep messaging results in sync automatically

A Sample of What Is Included

EVERY REPORT FILTERABLE BY DATE, CAMPAIGN, GROUP AND AGENT



See Apex running on your own data

We will walk you through the platform against a real campaign, show you the reports that matter to your operation, and give you a straight answer on what it would take to move.

apexccp.com

BOOK A DEMONSTRATION