Introduction

CX Hub is your access point to receive agent contact center calls, make outbound calls, and manage digital campaigns based on your role and your company's configuration. **The purpose of this guide is to provide how to login to CX Hub, a tour of the agent dashboard, and how to use your dashboard based on your role.**

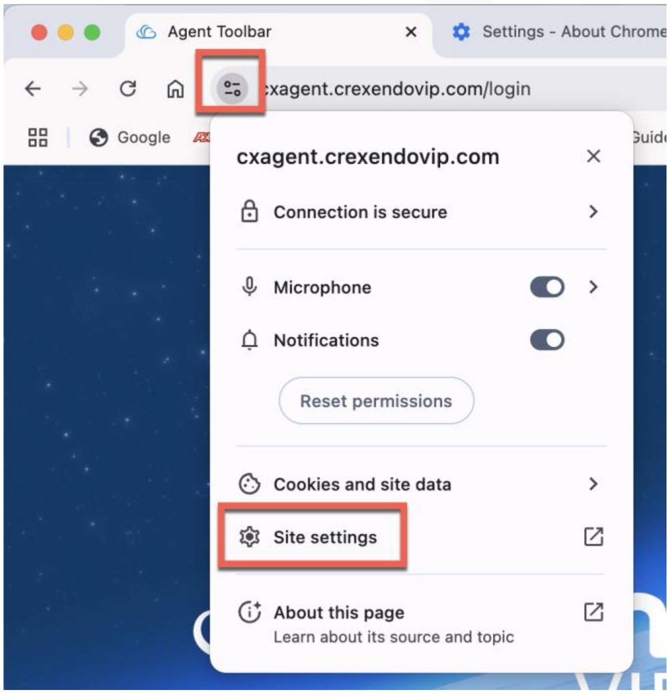
Getting Started

To access CX Hub, you are required to use Google Chrome. To have full functionality, the following Chrome settings must be implemented:

- Third Party Cookies – set to "**Allow third-party cookies**."
- Use graphics acceleration when available – **Toggle off.** You will need to relaunch your browser after this action.
- Verify your version of Chrome is up to date – In the Chrome settings, select "**About Chrome**" which will check your version and update it in necessary. If an update is initiated, relaunch your browser upon completion.

Once your Google Chrome settings are configured correctly, the site permissions must also be configured correctly:

- Navigate to https://cxagent.crexendovip.com/login.
- Select the site "**View site information**" icon and select "**Site settings**."

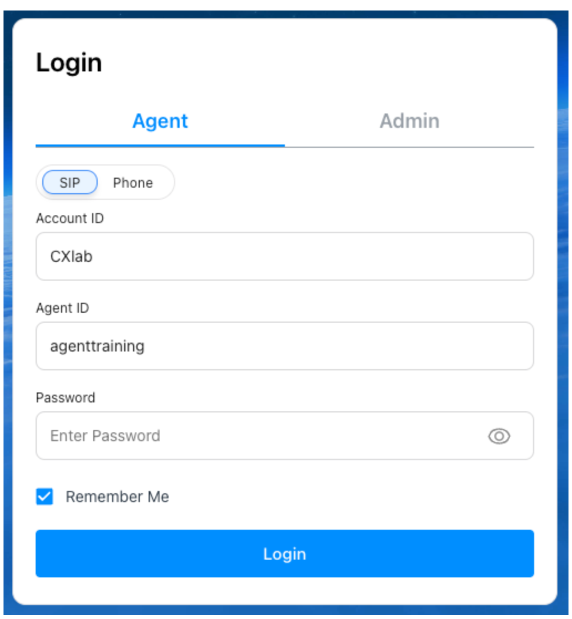


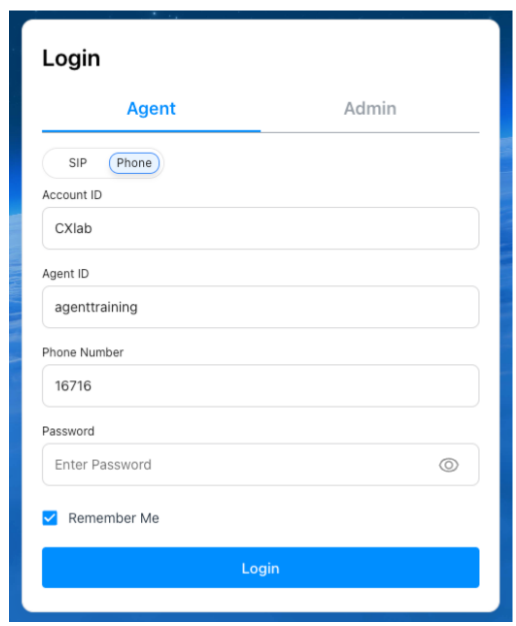
- Ensure the following options are set to “**Allow**”:
  - Microphone
  - Notifications
  - Pop-ups and redirects
  - Sound

How to Login to CX Hub

1. Navigate to https://cxagent.crexendovip.com/login
2. From the login screen, make sure you are on the “**Agent Tab**.”

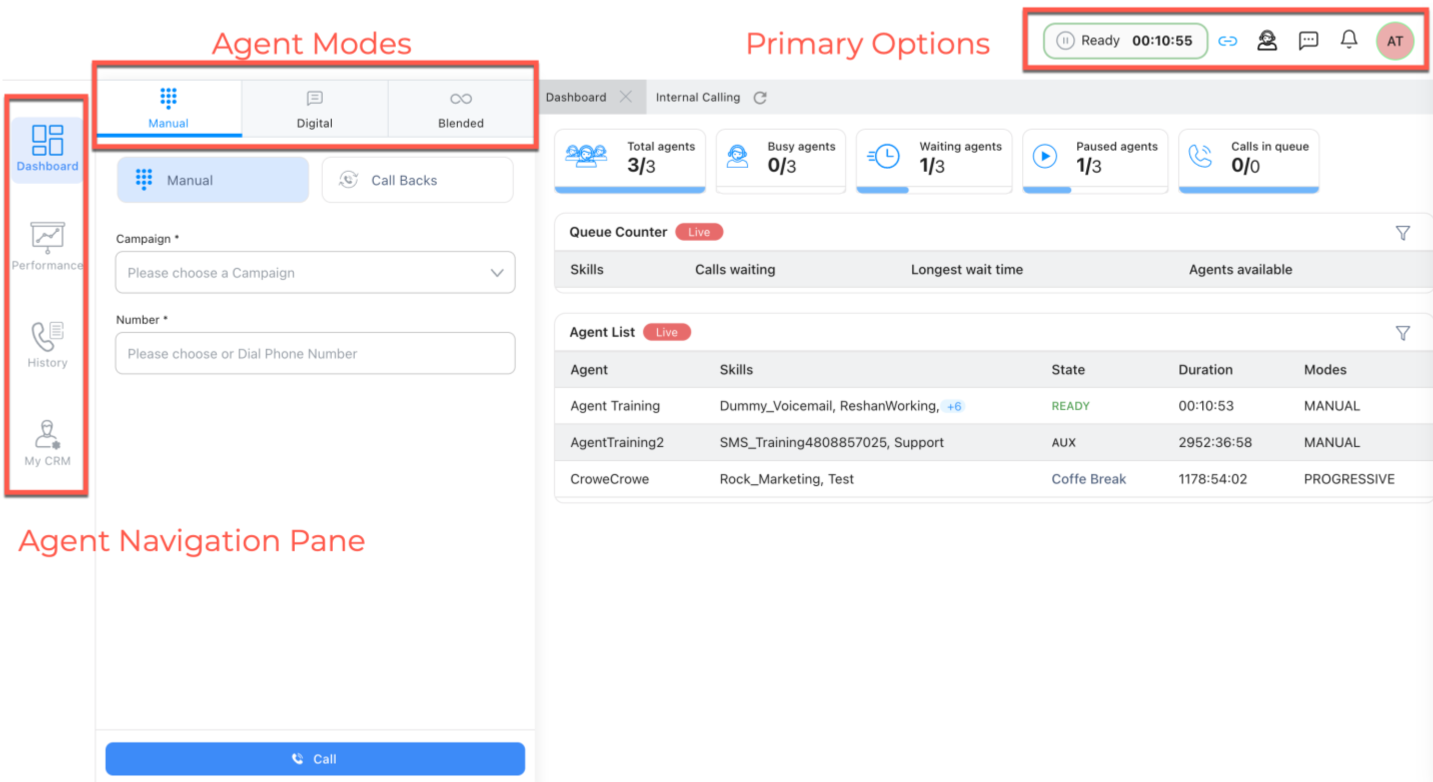
3. There are two options to use when logging in as an agent: **SIP** and **Phone**. Your administrator will instruct you which one to select.



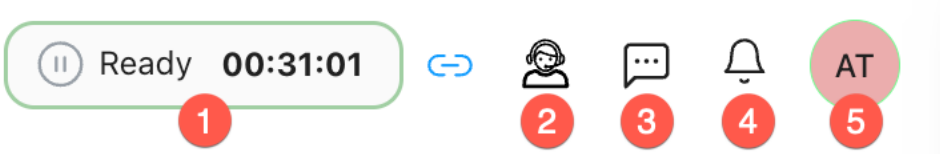


4. Enter your login credentials as provided by your administrator and select “**Login**.”

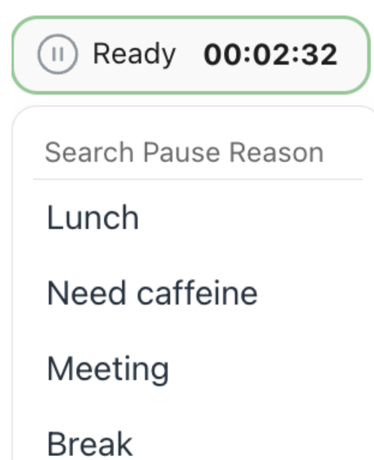
The Agent Dashboard



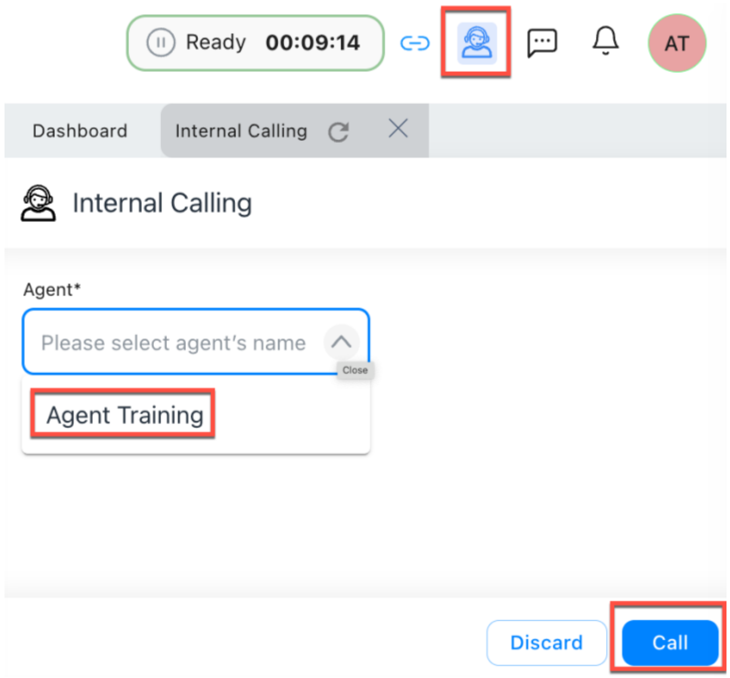
Primary Options



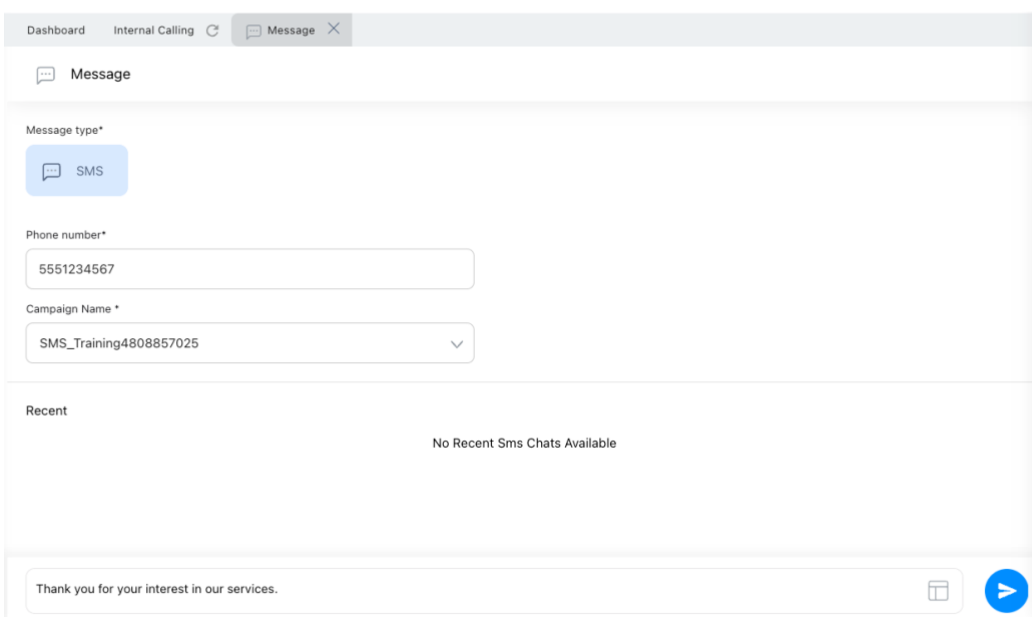
1. **Status Update:** When logging in, your status defaults to **Not Ready**. Click the **"Not Ready"** button again to switch to the **'Ready'** state. To go to a Not Ready state again, select the "**Ready**" button and select the reason.



2. **Internal Calling** allows you to call another available agent. The drop-down list will only show other agents that are logged in "Ready" state and they are in inbound/blended mode. Select the name of the agent and select "**Call**" to call the agent.

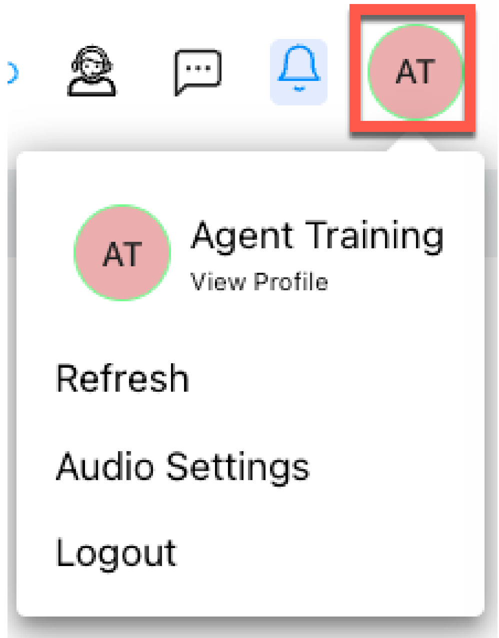


3. **SMS** allows you to send text messages to customers. If you are NOT part of an SMS campaign, you will not be able to send/receive a message.

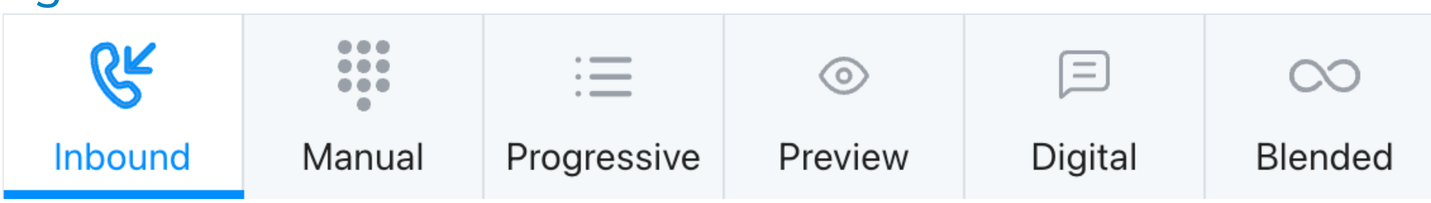


4. **Notifications**: this area allows you to view any messages from your administrator such as emergency notification.

5. **Account Settings** allows you to refresh your session, customize your audio settings, and logout of CX Hub.

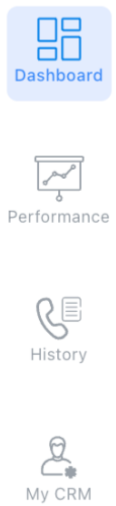


Agent Modes



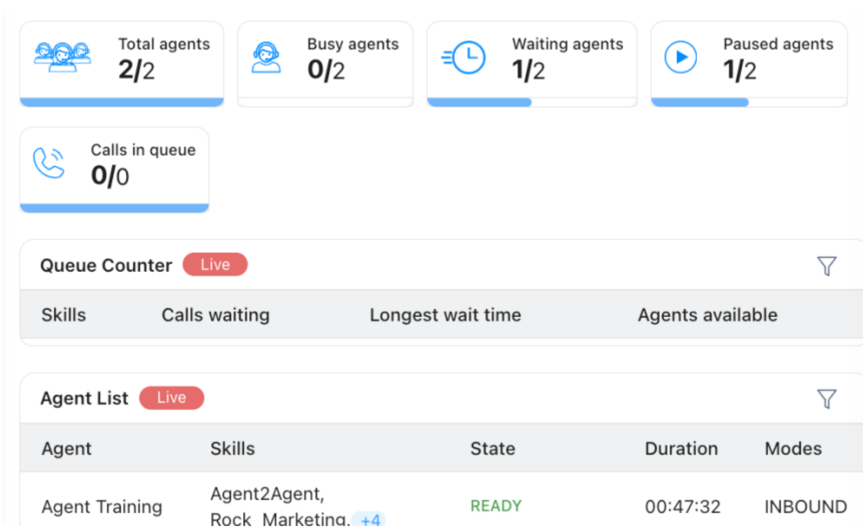
1. **Inbound**: Answer incoming calls.
2. **Manual**: Make manual outgoing calls. This mode does **not** allow inbound interactions.
3. **Progressive**: Automatically makes outbound calls from a list of numbers uploaded by your administrators.
4. **Preview**: Provides a preview of the contact or lead you will be calling before making the actual call including any lead details previously saved.
5. **Digital**: Manage digital channel campaigns including Webchat, inbound SMS/text messages, social media, etc.
6. **Blended**: Handle any channel, including inbound/manual/digital interactions, all in one mode. For example, in blended mode, you could receive an incoming call and then place an outgoing call if enabled to do so.

Agent Navigation Pane

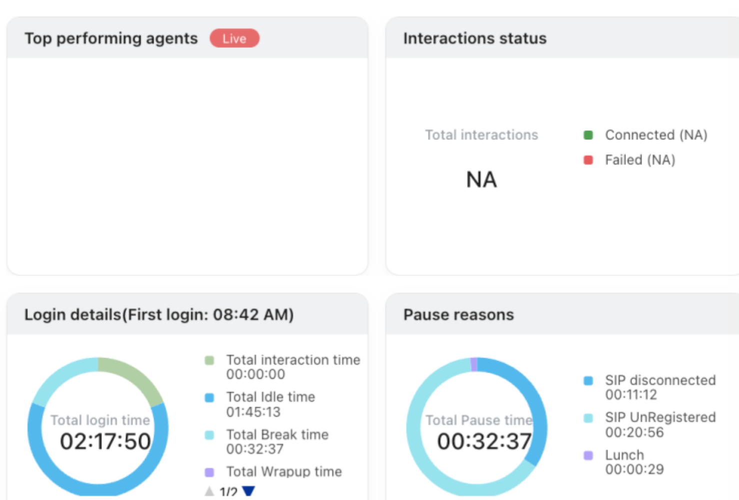


The Agent Navigation Pane provides easy access to your agent dashboard, your individual performance statistics, your call history, and any CRM integrations that your organization may have.

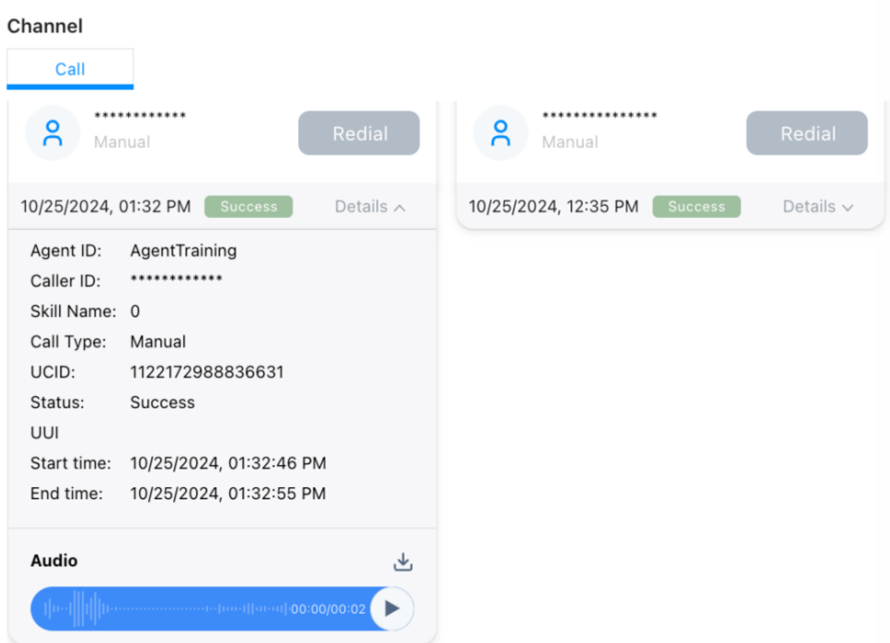
- **Dashboard:** provides live updates for your call queues and agent status updates.



- **Performance:** provides insight into your statistics including Top performing agents, Interactions status, Login details, and your Pause Reasons.



- **Call History** shows all your call history and details including the call recording if enabled.

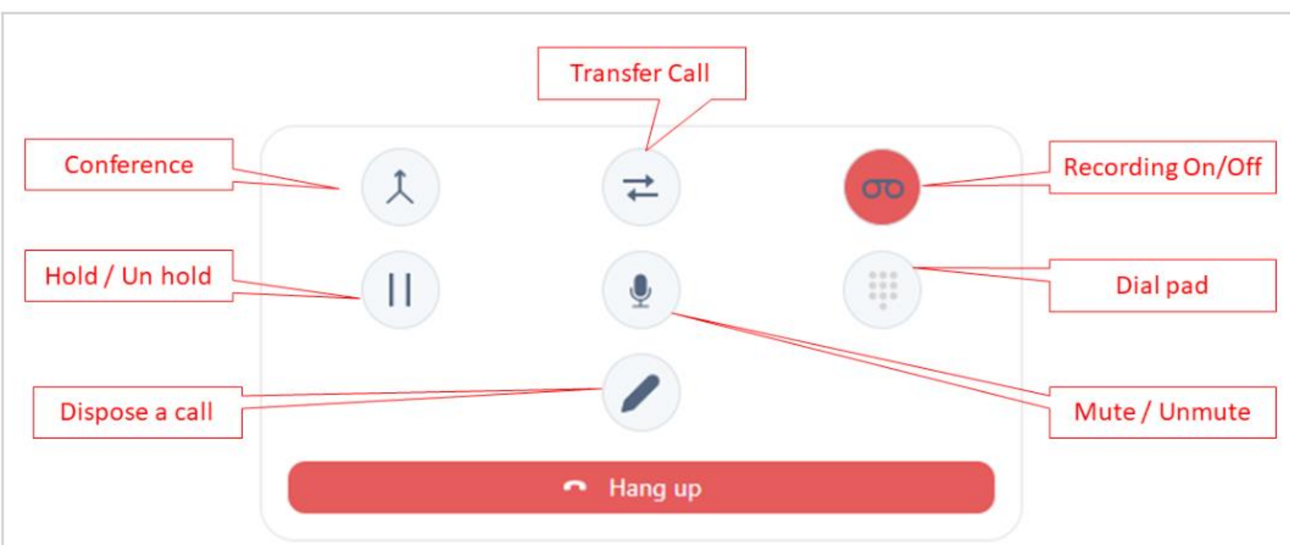


- **My CRM:** if your organization utilizes this section, your administrator will instruct you how you will use it.

How to Answer and Manage an Inbound Call

1. If your phone is not set to auto-answer, select "**Answer**" to be connected with the caller. 

2. Once you are connected with the caller, you have several options available:



a. **Mute**: temporarily mutes your microphone

b. **Hold**: places the caller on hold

c. **Transfer**: moves the call to another agent. This action can be done through a Blind Transfer or a Warm Transfer.

   i. **Blind Transfer** – moves the call to another agent and removes you from the conversation.

   ii. **Warm Transfer** – you can transition the call to another agent by introducing the new agent before removing yourself from the call.

d. **Conference**: adds another agent to participate in the call with you.

e. **Recording**: you can disable audio recordings for sensitive information and enable it as needed.

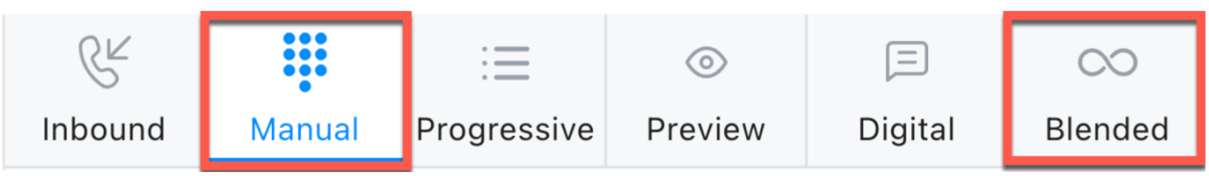
f. **Dial Pad**: can be used for navigating menus during outgoing calls.

g. **Disposition**: used to record the results of the call including any prepopulated codes, comments, or schedule call back date and time. This can be edited during or after the call.

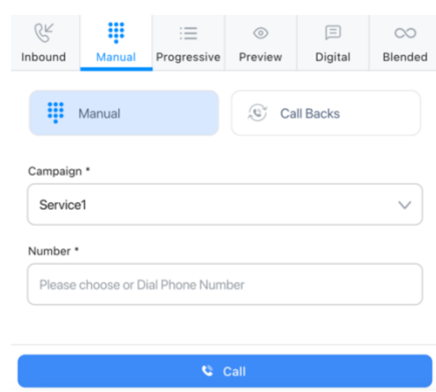
3. Once the call has completed, based on your organization's setup, you will complete the disposition or go back to a ready state for the next call. Your organization may have a wrap-up time (ACW) to complete any notes on the disposition screen. **If you save the disposition before the wrap-up time is complete, you will go back to a ready state**.

How to Make an Outbound Call

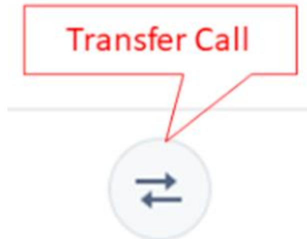
1. Select either **Manual Mode** or **Blended Mode**.



2. Select the campaign from the drop-down menu that you will be calling from.
3. Enter the number you want to call in the blank.
4. Select "**Call**" to place the call.



NOTE: Depending on your organization's setup, you may need to select "**Answer**" to be connected to the outbound call you are attempting.

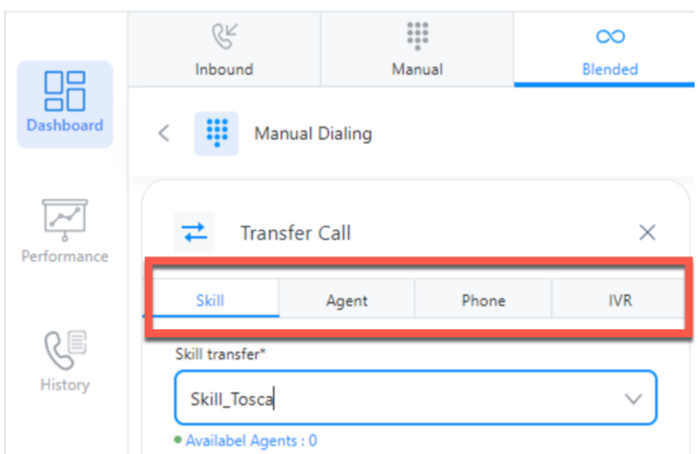


How to Transfer a Call

If you need to move the call to another agent, this action can be done through a **Blind Transfer** or a **Warm Transfer**.

- **Blind Transfer** moves the call to another agent and removes you from the conversation. **This option is NOT available during outbound calls.**
- **Warm Transfer** allows you to transition the call to another agent by introducing the new agent before removing yourself from the call. When performing a warm transfer, you have two options available:
  - **CANCEL Transfer** will cancel the transfer to another agent if they are unable to take the call which will allow you to try another agent.
  - **COMPLETE Transfer** will transfer the caller to the other agent and remove you from the call.

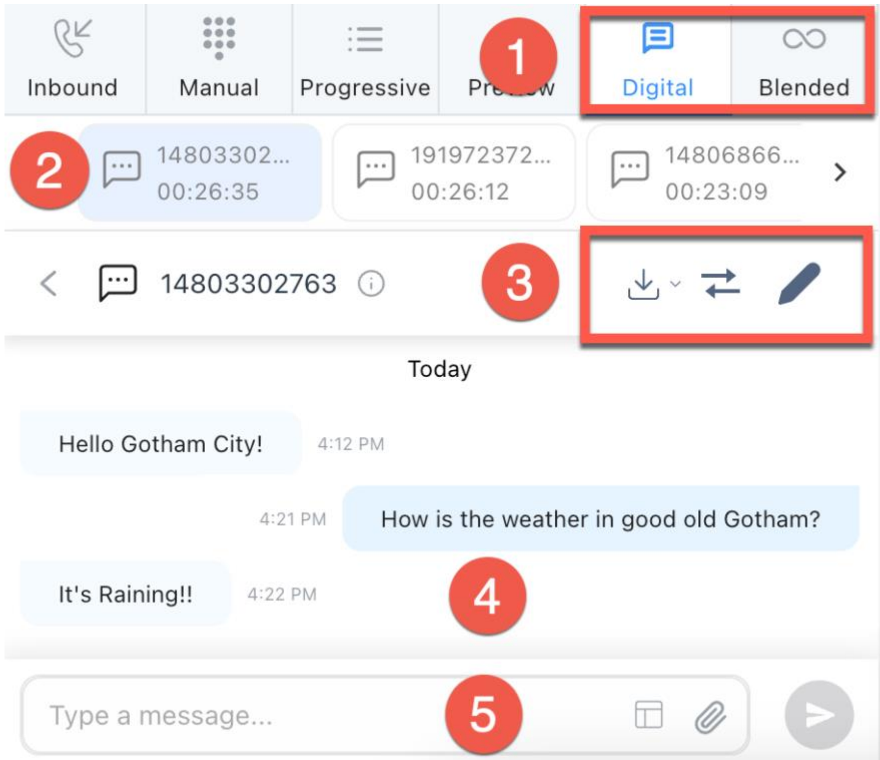
When making a transfer, you can choose to transfer a call to specific groups or numbers:



1. **Skill**: Used when customers need to be rerouted to the correct group or queue.
2. **Agent**: For transferring a call to a specific agent. Only available agents in an inbound mode and in a ready state will be shown.
3. **Phone**: For transferring a call to a number outside your organization.
4. **IVR**: Transfers the call to an Interactive Voice Response system or auto attendant.

Digital Interactions

All digital channels can be found in the Chat option, regardless of the customer's entry point (SMS, Webchat, Twitter, Facebook, etc.) You can handle multiple sessions at the same time if enabled by your administrator.



1. To interact with digital interactions, you must be in either **Digital** or **Blended** mode
2. If you have multiple digital interactions at the same time, you can toggle between them as needed.
3. Available digital interaction options:
    a. **Download**: you can download the conversation or chat history for documentation purposes.
    b. **Transfer**: you can transfer the digital interaction to another queue or agent that is in ready state.
    c. **Disposition**: once the interaction is complete, choose the disposition icon to give a disposition reason and any comments as needed.
4. **Digital Interaction Body**: the active conversation
5. **Message Input**