Introduction

CXHub is your access point to monitor and manage your call center and agents. **The purpose of this guide is to provide a tour and navigation of CXHub for managers and supervisors, provide a list of the most important live and historic reports, and several daily tasks you may complete in managing your call center.**

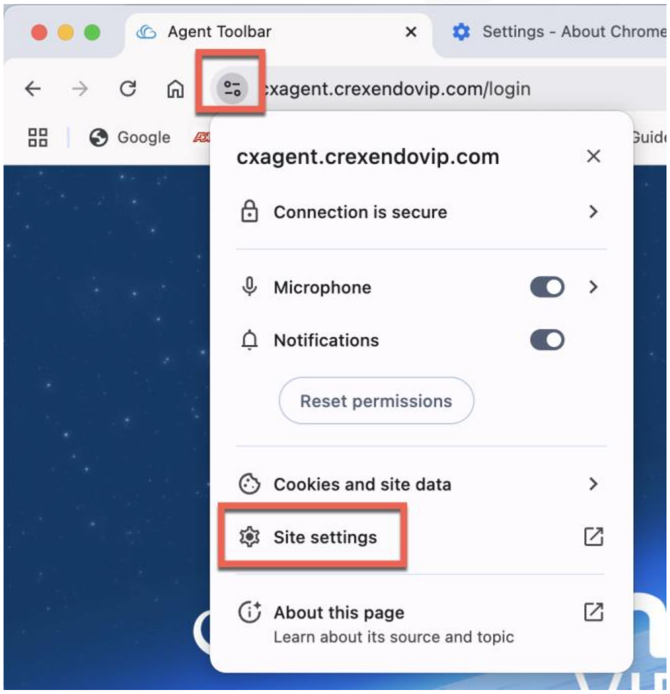
Getting Started

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 when 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:

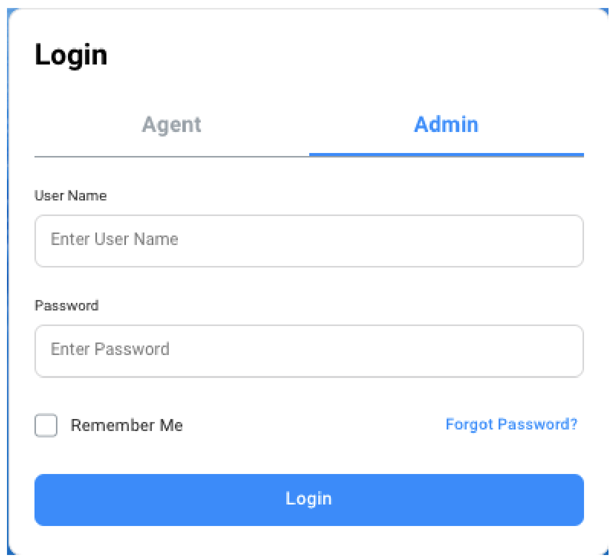
- Navigate to https://cxagent.crexendovip.com/login.
- Select the site "**View site information**" icon  and select "**Site settings**."



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

How to Login to CX Hub

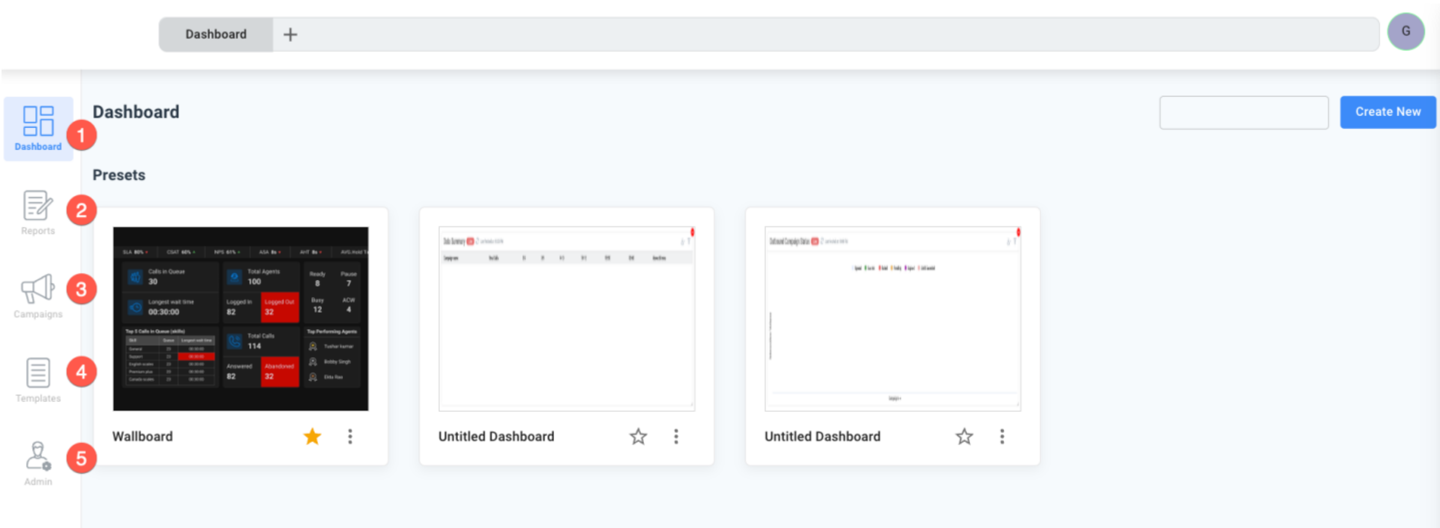
1. Navigate to https://cxhub.crexendovip.com/login



2. From the login screen, make sure you are on the "**Admin Tab**."

3. Enter your login credentials as provided by your administrator and select "**Login**."

CXHub Navigation

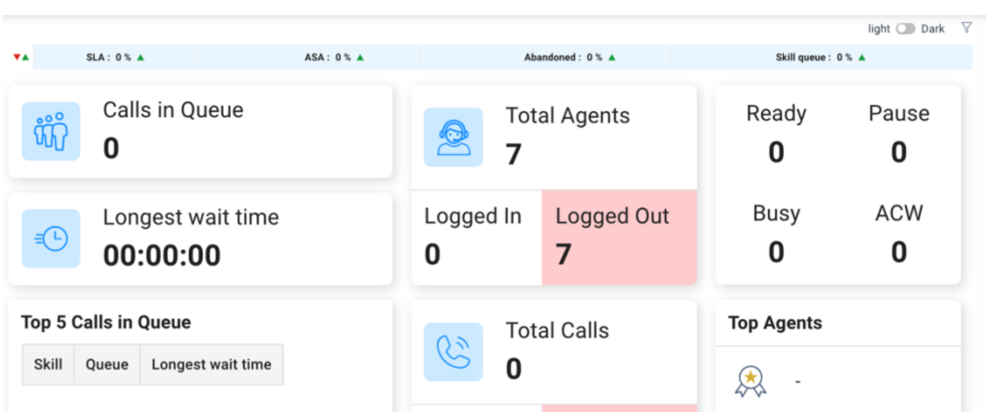


NOTE: Your view of CXHUB may be slightly different based on your level of access set by your administrators.

1. **Dashboard** – Create and access real-time dashboards to get an instant view of the Call Center and Agent Status, Agent Monitor, and System Monitor.
2. **Report** – Access live and historical data, call detail records, Admin Dashboard, etc.
3. **Campaigns** – Manage inbound and outbound calls for your agents using manual, predictive or progressive dialing.
4. **Templates** - Create default template messages for your digital campaigns.
5. **Admin** - Add users, agents, and to configure telephone numbers, skills, pause reasons, and dispositions. etc.

Dashboards

In the Dashboard section, you are provided with one default dashboard called "**Wallboard**." This dashboard is a ready built way to monitor your call center and provides real-time information on your queues, agents, and call volume.

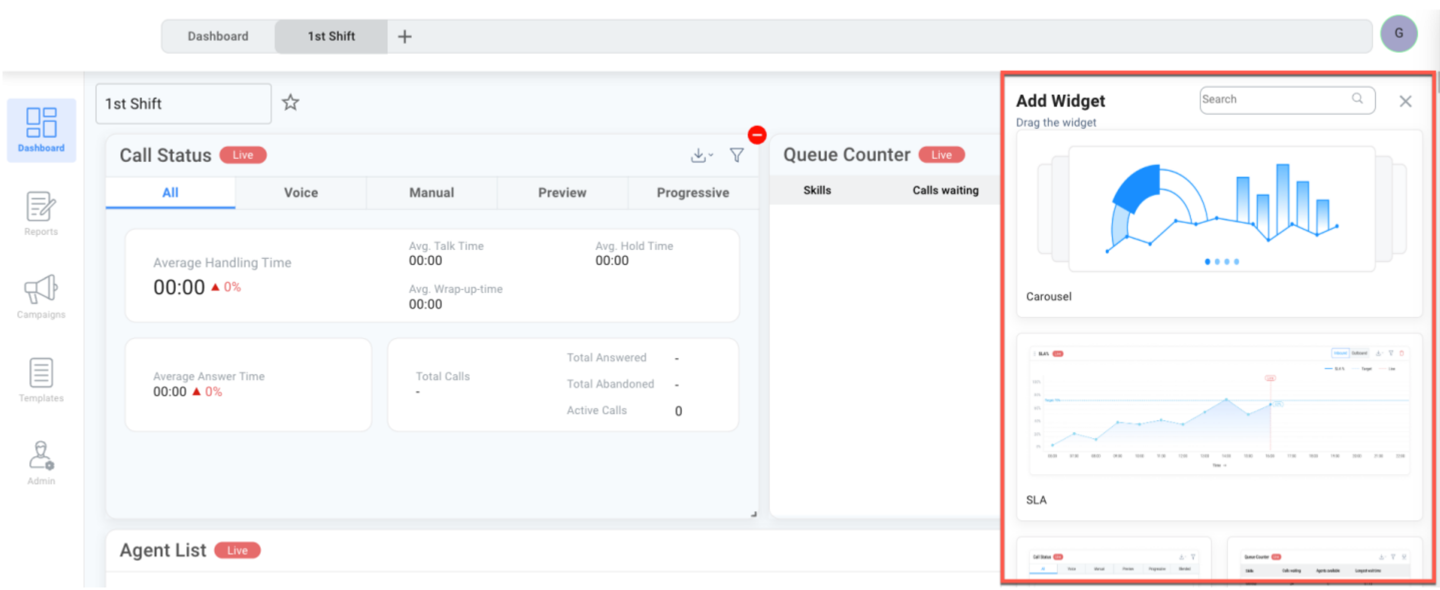


How to Build a Custom Dashboard

If you would like to have other dashboards that display real-time information that is not included in the "Wallboard":

1. On the Dashboard screen, select "**Create New**" on the upper right side of the screen.

2. Give your dashboard a name by clicking the "**Untitled Dashboard**" box.
3. To begin customizing your new dashboard, select "**Add Widget**" on the upper right side of the screen.
4. Select the widget and drag it onto your dashboard.
5. Repeat the process as needed with any of the other widgets.

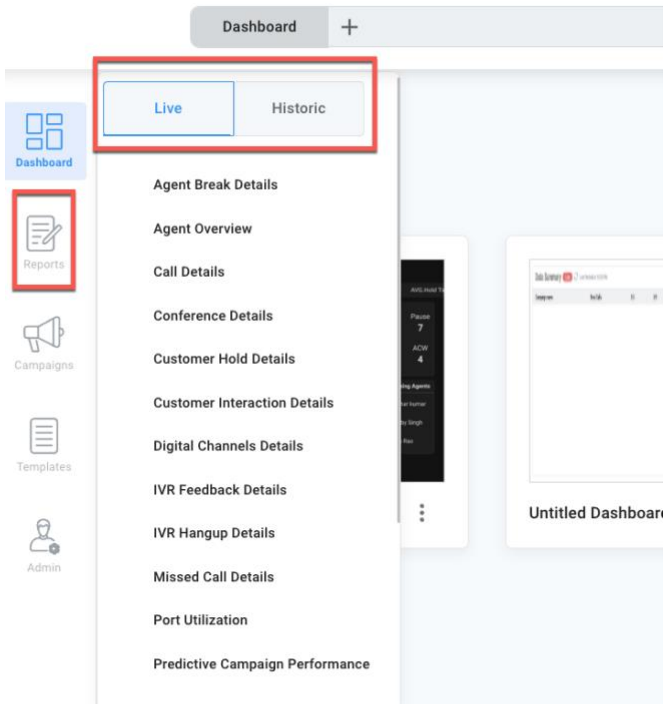


6. To save your new dashboard, select the "**X**" from the Add Widget pane and select "**Save**." You will now see your new Dashboard listed on the Dashboard section.
7. To edit your already existing board, select the ⋮ next to the board and select "**Edit**" to edit your dashboard or "**Delete**" if the dashboard is no longer needed.

Reports

As a manager or supervisor, you have access to many different types of reports measuring different metrics and capturing data for you to review. There are several reports in which you may find valuable in measuring the success of your call center.

To access the Reports section, hover over "**Reports**" on the left side navigation pane. There are two options for types of reports offered: **Live** and **Historic.**



The following are a list of Live and Historic Reports that you may find useful:

Live Reports:

- **Agent Break Details** - displays an agent's break pattern, such as if they are taking too many breaks or exceeding the approved break duration.
- **Agent Overview** – displays an agent's performance statistics, disposition summary, and agent login information.
- **Call Details** - offers a comprehensive view of each call's metrics, including duration, campaign name, dynamic DID number, and more. It is intended for supervisors to track agent performance in the contact center. Generating the report allows supervisors to get a clearer picture of agent performance on calls and find ways to improve.
- **Conference Details** - provides comprehensive analytics on conference calls that occurred on your account for the current day. It includes key information such as participant's name, duration, start and end time, and the audio recording.

- **Digital Channel Details** - offers a complete overview of all chats and the associated metrics. It allows for online analysis of agent performance in the contact center based on various chat metrics.
- **Skill Report** - provides insight into the assignment of agents to specific skills within a contact center. This information allows administrators to evaluate the distribution of calls among skills and assess the adequacy of staffing. It also helps identify potential adjustments to agent assignments, as well as skill-specific staffing needs.

Historic Reports:

- **Daily Call Summary** - measures the performance of the contact center in terms of incoming call volume and successful call connections. This report provides a breakdown of the total number of calls that have landed in the contact center by campaign and skill set.
- **Hourly Call Analysis** - measures the performance of the contact center on an hourly basis. This information can be used to determine the busiest hours of the day and the efficiency of the contact center during these peak periods.
- **Performance** - measures the performance of the agents in the contact center based on the type of campaign (inbound or outbound). It also measures the handling time of each agent for successful connections.
- **Call Details** - offers a comprehensive view of each call's metrics, including duration, campaign name, dynamic DID number, and more.
- **Campaign Productivity** - measures the performance of the contact center's campaigns by providing a breakdown of the number of calls received for each individual campaign. This report can be useful for tracking the success of individual marketing campaigns and for making data-driven decisions about the allocation of resources to specific campaigns.
- **Hourly Call Details** - measures the volume of inbound calls received by the contact center over a specific time, divided by hour. The report provides a summary of call volume and helps to analyze the load on the contact center, allowing administrators and supervisors to determine if there are enough agents available to handle the volume during different hours of the day.
- **Conference Details** - provides comprehensive analytics on conference calls within your account. It includes key information such as: **participant's name, duration, start and end time, and play audio.**
- **Agent Break Details** - provides an administrator with details about the amount of time agents spend on breaks, including instances where breaks exceed the allotted time.

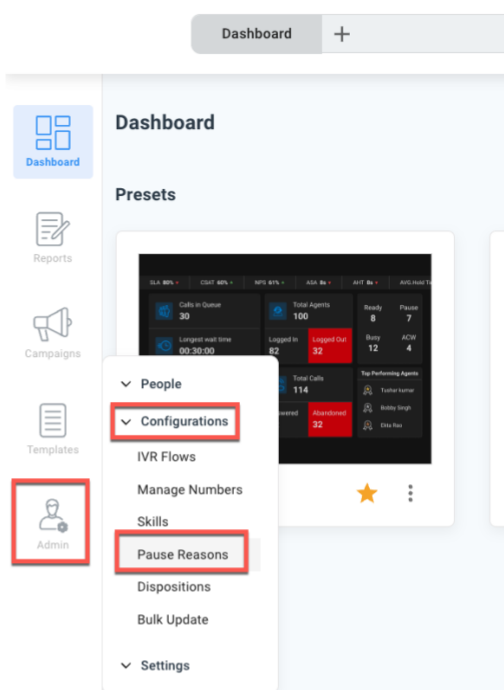
- **Agent Call Summary** - provides an overview of how individual agents are performing based on the type of calls they handle in the contact center and provides an assessment of the agent's proficiency, efficiency, and effectiveness in handling customer inquiries.
- **Agent Productivity** - evaluates the overall performance of an individual agent within a contact center.
- **Agent Login Details** - provides a complete record of an agent's activity during their logged-in time. It acts as an audit trail and tracks all actions performed by the agent during their shift.
- **Digital Channels Details** - offers a complete overview of all chats and the associated metrics. It allows for online analysis of agent performance in the contact center based on various chat metrics.

Daily Admin Tasks

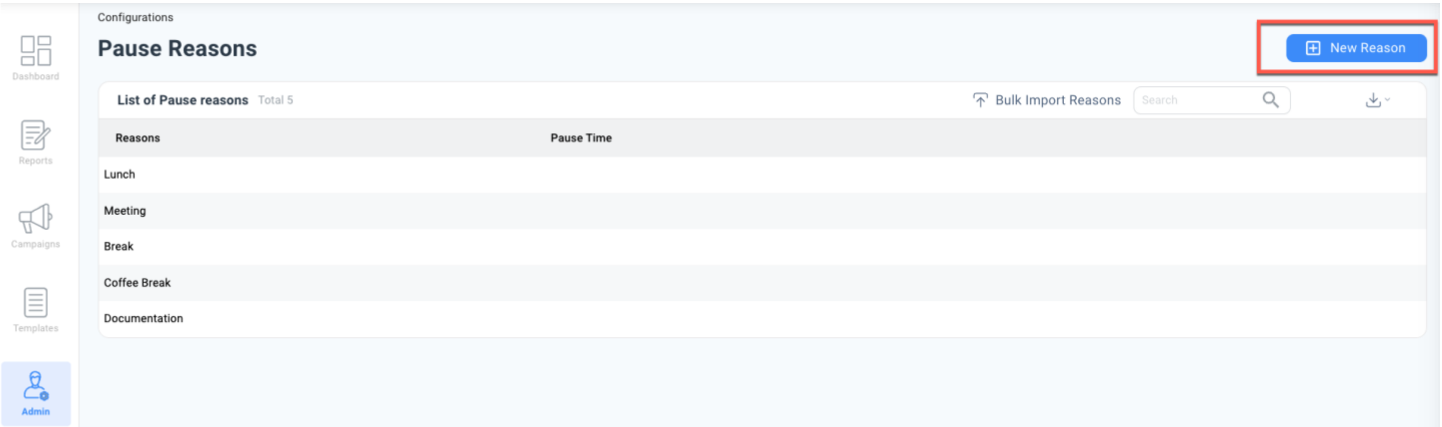
As an administrator or supervisor, you may need to make adjustments to your agents or queues on a daily basis. The topics below are a few tasks you may need to perform in the first few days of using CXHub.

How to Edit or Add a Pause Reason for Agents

1. Login to CXHub.
2. Hover over “**Admin**” on the left navigation pane.
3. Select “**Configurations**” to expand the available options.
4. Select “**Pause Reasons.**”



5. To edit an existing pause reason, double click the pause reason to open the available options.

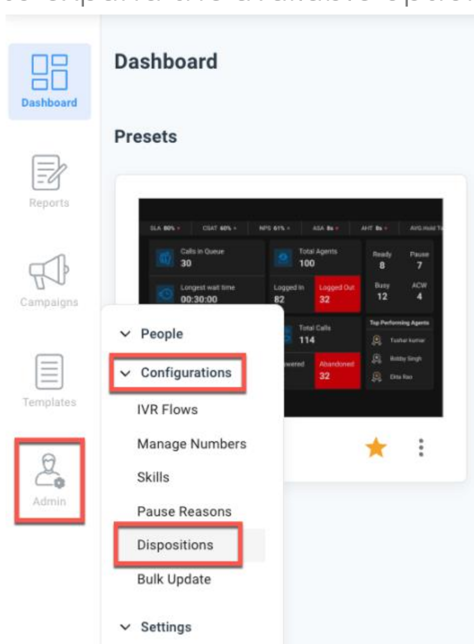


6. To add a new pause reason, select "**New Reason**" and enter the information as needed.

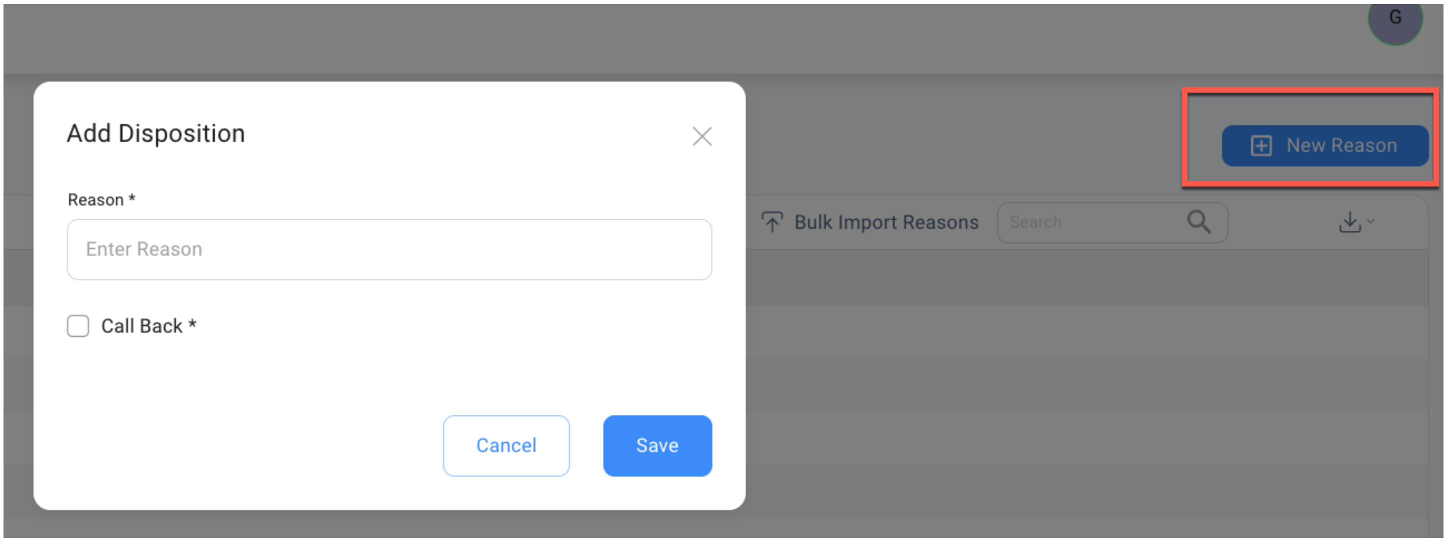
NOTE: If new pause reasons are added, they will not be available to the agent until they log out and login again.

How to Edit or Add a Disposition for Agents

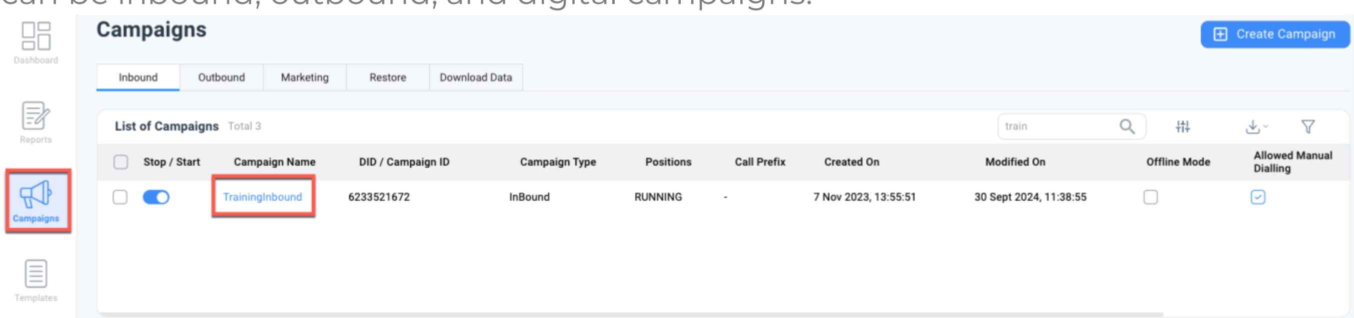
1. Login to CXHub
2. Hover over "**Admin**" on the left navigation pane.
3. Select "**Configurations**" to expand the available options.
4. Select "**Dispositions**"



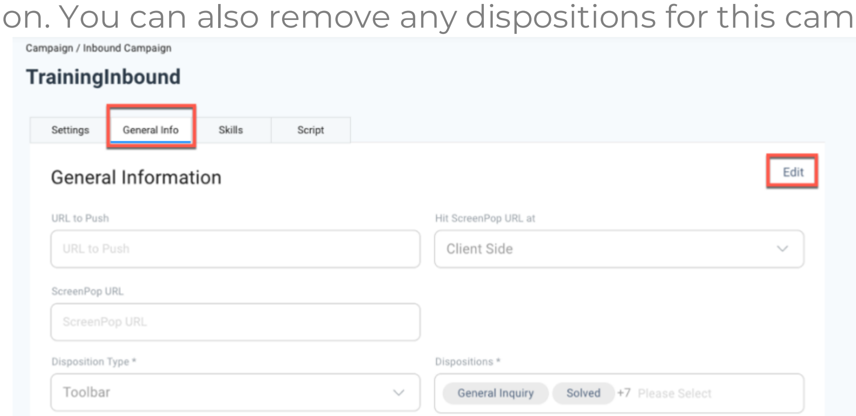
5. To edit an existing disposition, double click the disposition to open the available options.
6. To add a new disposition, select “**New Reason**” and enter the information as needed and select “**Save**.”



7. Once your new disposition has been created, add the new disposition to a specific campaign by selecting “**Campaigns**” from the left navigation pane.
8. Double click on the campaign you would like to add your new disposition to. These can be inbound, outbound, and digital campaigns.



9. Select “**General Info**” and “**edit**.” Click in the Dispositions box and select your new disposition. You can also remove any dispositions for this campaign from here.



10. Select “**Save**” at the bottom of the screen.

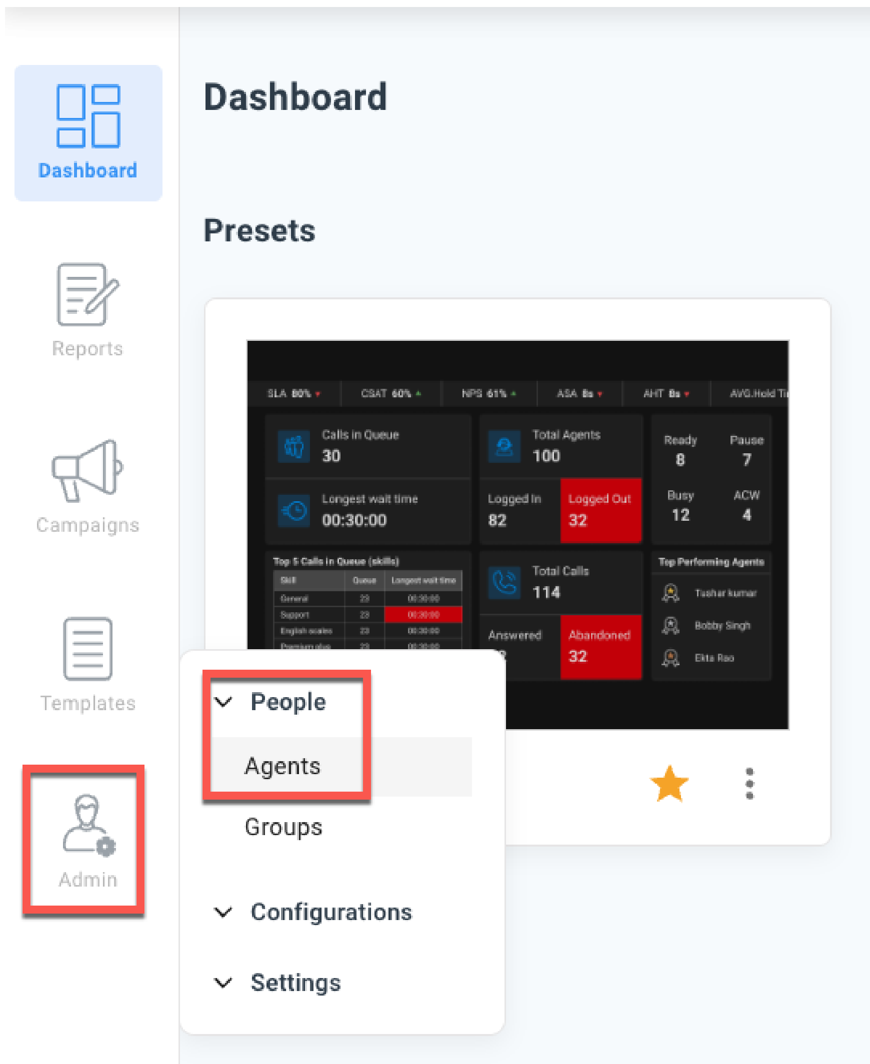
11. Repeat these steps for any other campaigns this disposition needs to be added to.

NOTE: If new dispositions are added, they will not be available to the agent until they log out and login again.

How to Add/Remove a Skill to/from an Agent

1. Hover over Admin on the left side navigation pane.

2. Click the drop-down arrow next to “**People**” and select “**Agents**.”

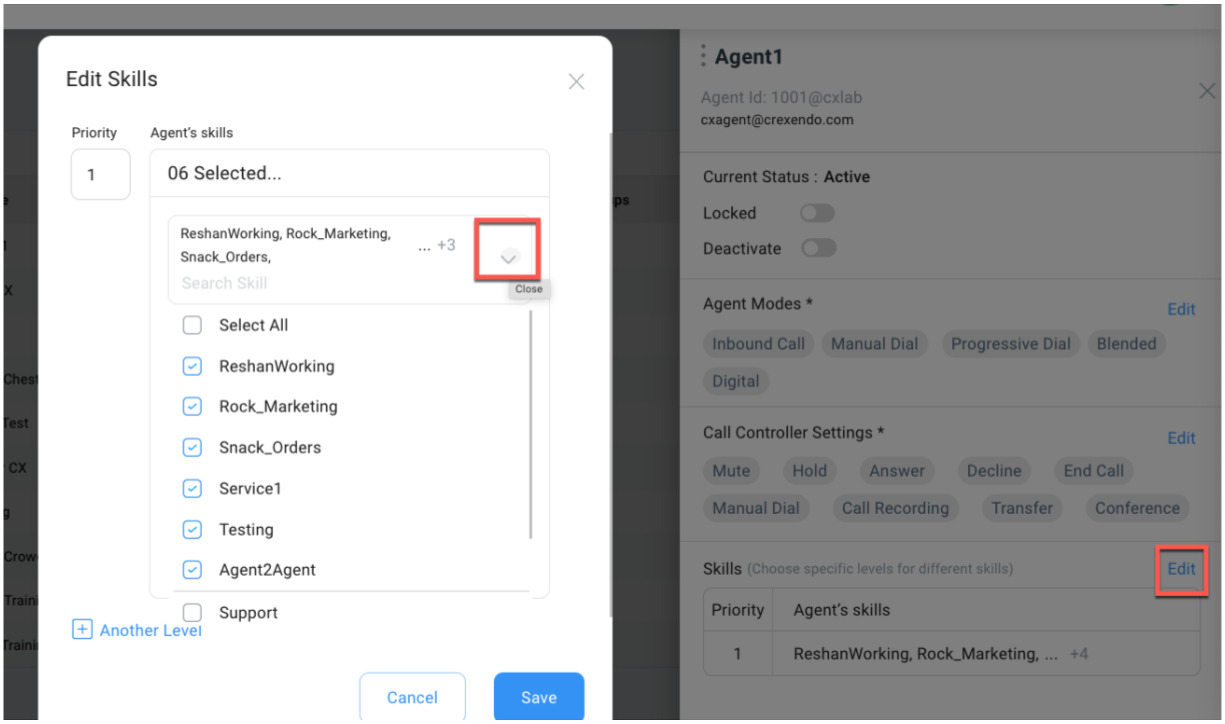


3. Locate the agent you want to add the skill to and double click on the agent ID and a menu screen will appear.

4. Select the “**Edit**” button next to Skills and a window will appear.

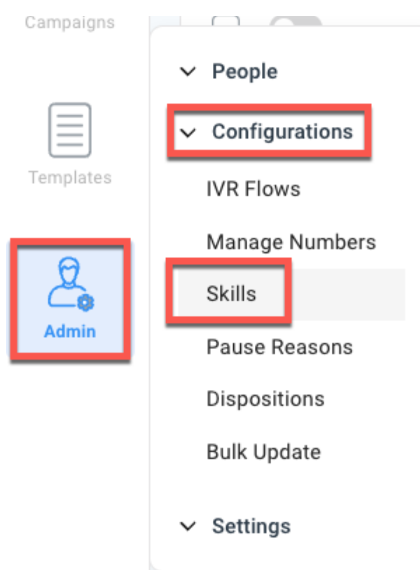
5. Select the drop-down arrow next to the existing skills and you will see any existing skills.

6. Select the skill you would like to add or remove with the agent and select “**Save**.”



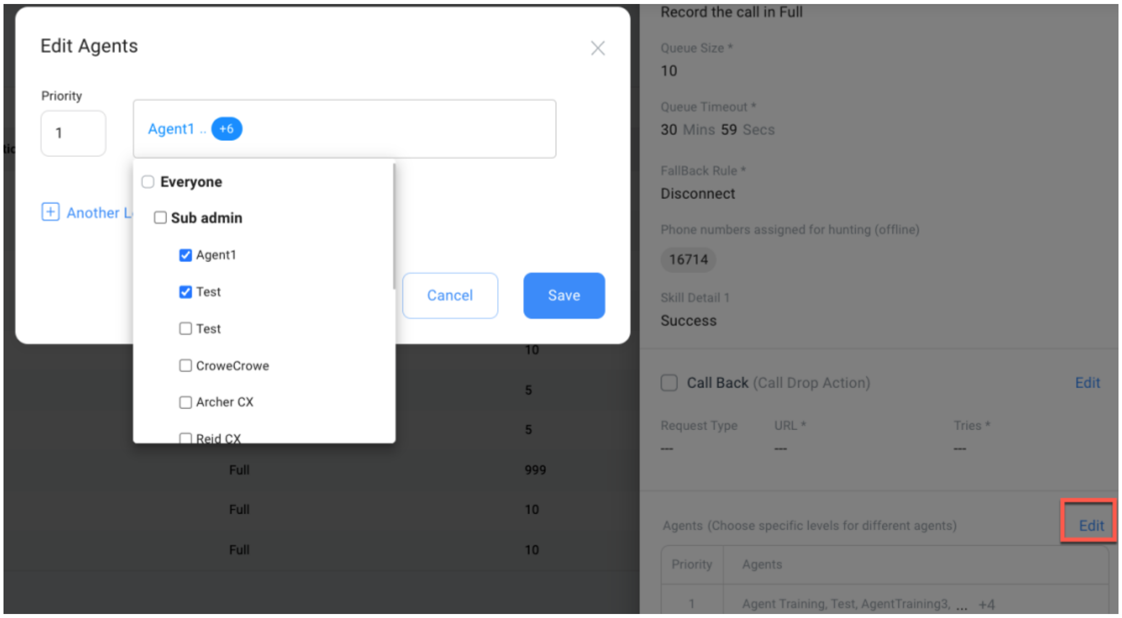
How to Add Multiple Agents to a Skill

1. Hover over Admin on the left side navigation pane.
2. Click the drop-down arrow next to “Configurations” and select “**Skills**.”



3. Locate the skill you would like to add agents to and double-click on the skill and a new menu will appear.

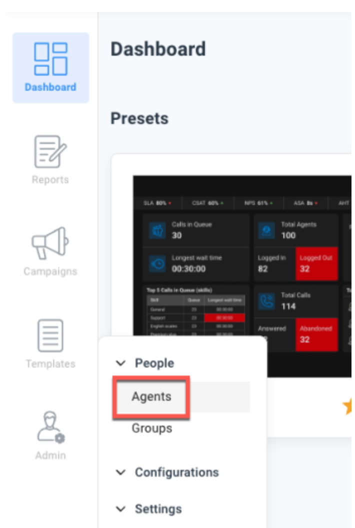
4. In the menu, locate the Agents section at the bottom and select "**Edit**."
5. Click inside the agents box and select the drop-down menu which will display all existing agents.



6. Select the agents you would like to be added to this skill and select "**Save**."

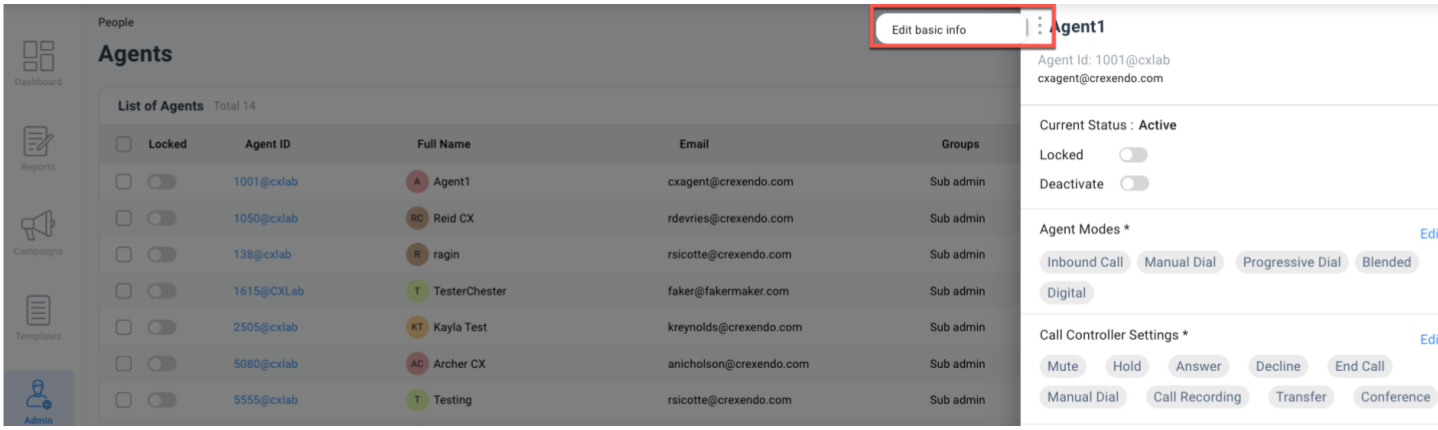
How to Reset an Agent's Password

1. Hover over Admin on the left side navigation pane.
2. Click the drop-down arrow next to "**People**" and select "**Agents**."



3. Locate the agent and double-click on the agent ID and a menu will appear.

4. Locate the three dots next to the agent ID and select “**Edit basic info**.”



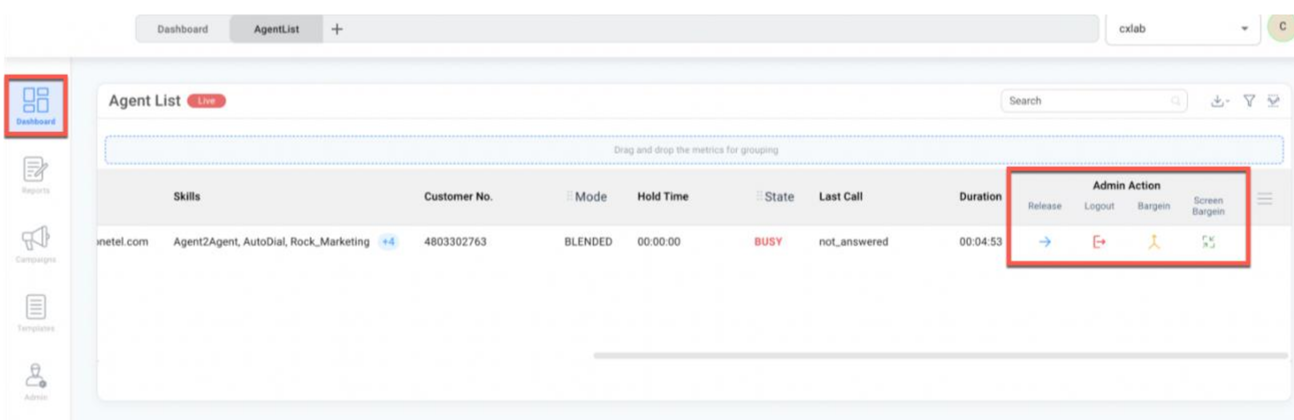
5. In the Edit Basic Info menu, update the password as needed and select “**Save**.”

NOTE: Passwords are encrypted and cannot be recovered. Please use best practices using complex passwords for your organization’s security.

How to Monitor an Agent’s Live Call and Logout the Agent

NOTE: You must have a dashboard with the “**Agent List**” widget.

1. Select “**Dashboard**” from the left navigation page.
2. Select the dashboard that includes your “**Agent List**” widget.
3. Locate the agent in an active call and scroll right to reveal the “**Admin Action**” options.



The available options are:

a. **Release** – releases the agent from a suspended mode to an active state.

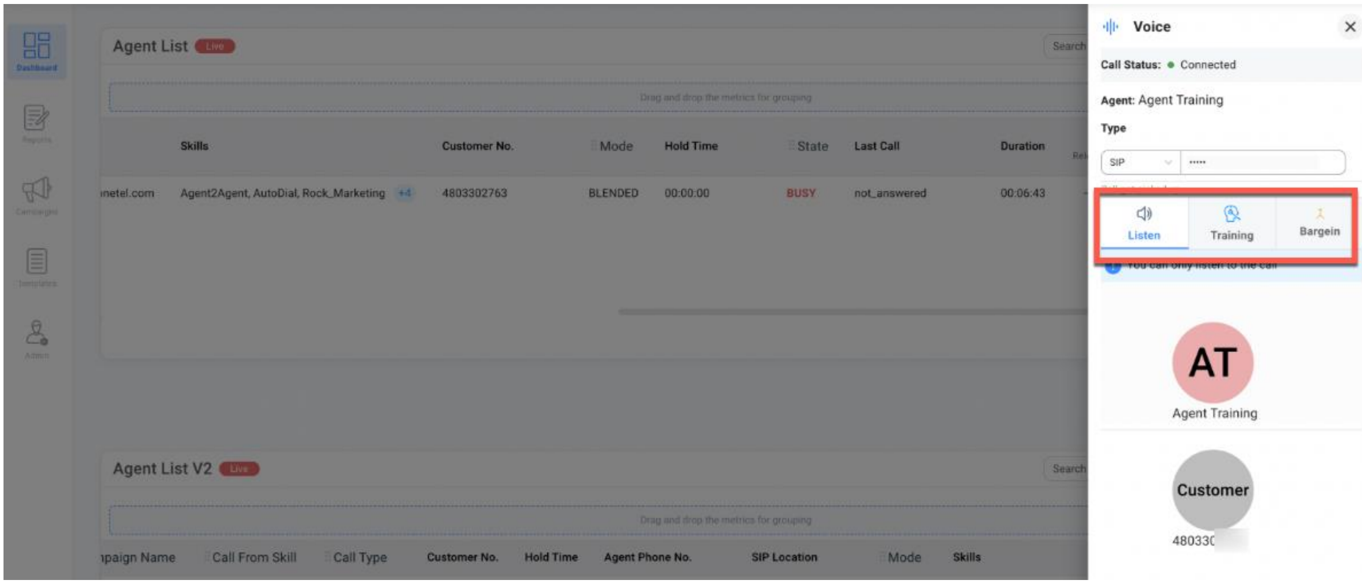
b. **Logout** – logs out the agent immediately whether they are on a call or not.

c. **Barge In** – this allows you to monitor the call with three options

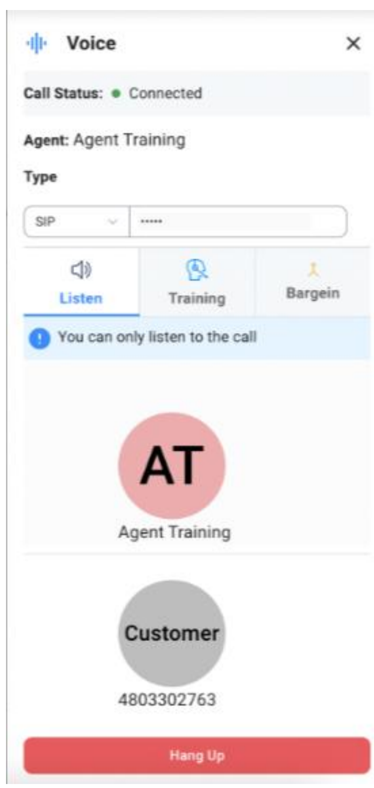
   i. **Listen** – this allows you to listen in without notifying the agent or caller

   ii. **Training** – this allows you to speak directly to the agent without the caller being able to hear you.

   iii. **Barge In** – this allows you to join the call and both agent and caller will hear you.

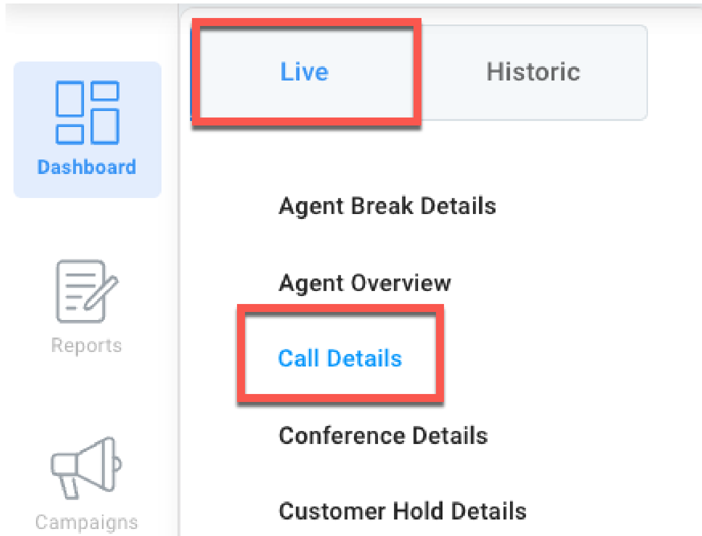


NOTE: Once you finish monitoring the call, you must select "**Hang Up**."

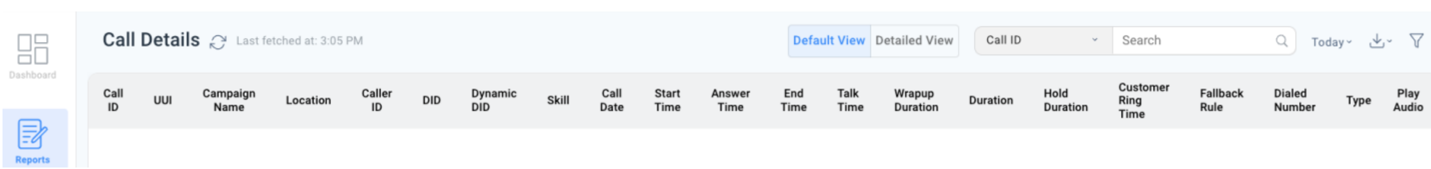


How to Listen to Call Recordings from Today

1. Hover over “**Reports**” on the left navigation pane.
2. Select the “**Live**” tab at the top of the menu and select “**Call Details**.”



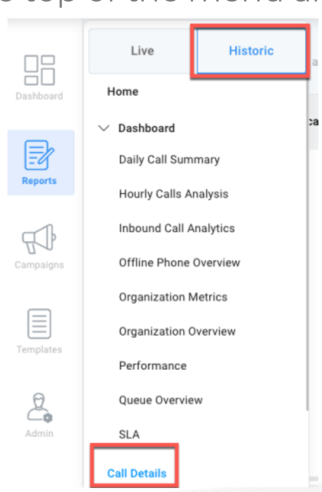
3. You can navigate through any recordings or to locate a specific call, select “**Caller ID**” from the drop-down menu and enter the phone number to search. You can also choose a time range to filter the calls through.



4. You can listen to the call by selecting the “**Play**” button or download the recording.

How to Listen to Historic Call Recordings

1. Hover over “**Reports**” on the left navigation pane.
2. Select the “**Historic**” tab at the top of the menu and select “**Call Details**.”



3. You can navigate through any recordings or to locate a specific call, select "**Caller ID**" from the drop-down menu and enter the phone number to search. You can also choose to search between **Yesterday**, **Last Seven Days**, or set a **Custom date range**.
4. You can listen to the call by selecting the "**Play**" button or download the recording.