CXBOX Hub

User Manual Guide

CXBOX
HUB

All-in-one application for better customer service

Table of Contents

Introduction

CXBOX Hub is developed by Demeter ICT. With its seamless integration with Zendesk and Sunshine Conversations, CXBOX Hub enhances customer interactions across multiple online channels, elevating the overall customer service experience.

This guide provides a step-by-step walkthrough of setting up and utilizing CXBOX's core features, ensuring a smooth and efficient implementation process.

CXBOX Hub Integration

Important Note: CXBOX Hub requires Sunshine Conversations to connect with Zendesk. If your Zendesk plan doesn't include Sunshine Conversations (available in the 'Suite Professional' and 'Suite Enterprise' plans), integration with CXBOX Hub won't be possible. Please make sure your plan includes this feature to use CXBOX Hub fully.


Only "Suite Professional" and "Suite Enterprise" come with Sunshine Conversations Access

To get started, register an account on the CXBOX Hub website at CXBOX Hub. You will receive an email notification to confirm your account. After creating an account, you can then log in to the CXBOX Hub dashboard.
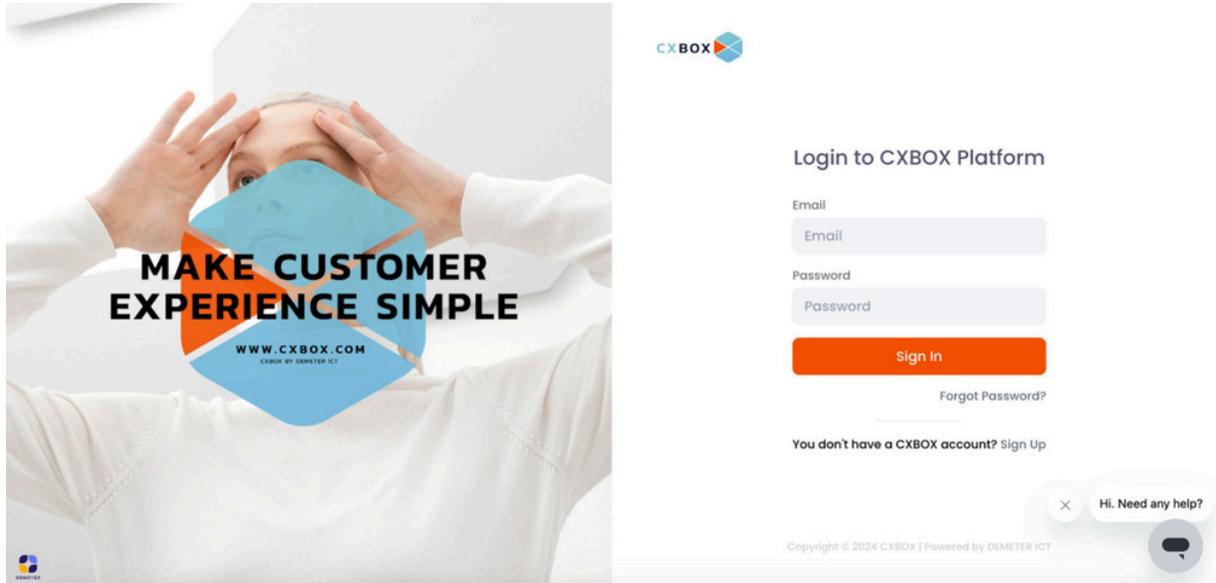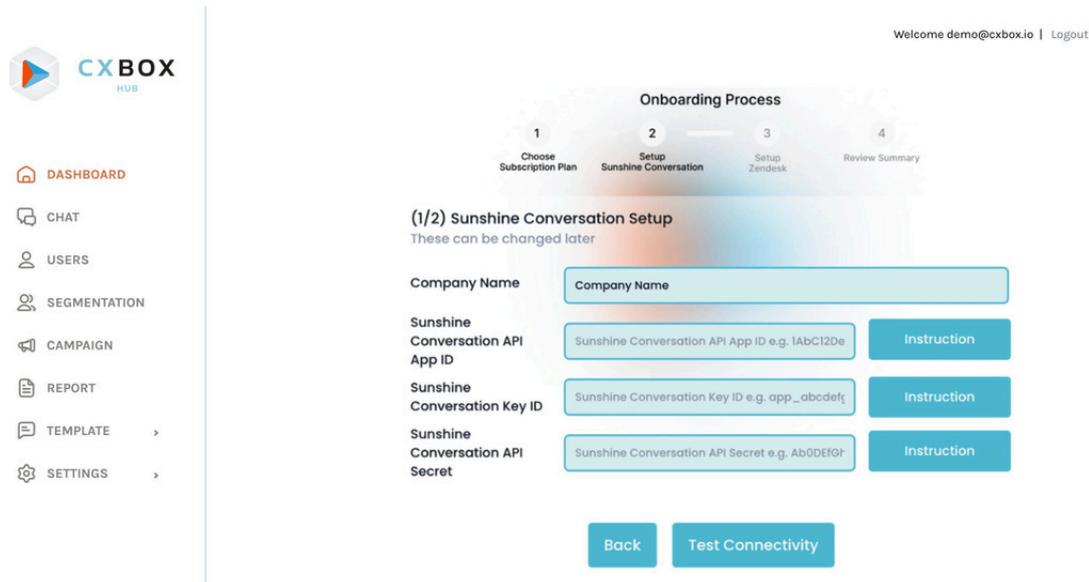

Once logged in, choose the subscription plan that best suits your needs.
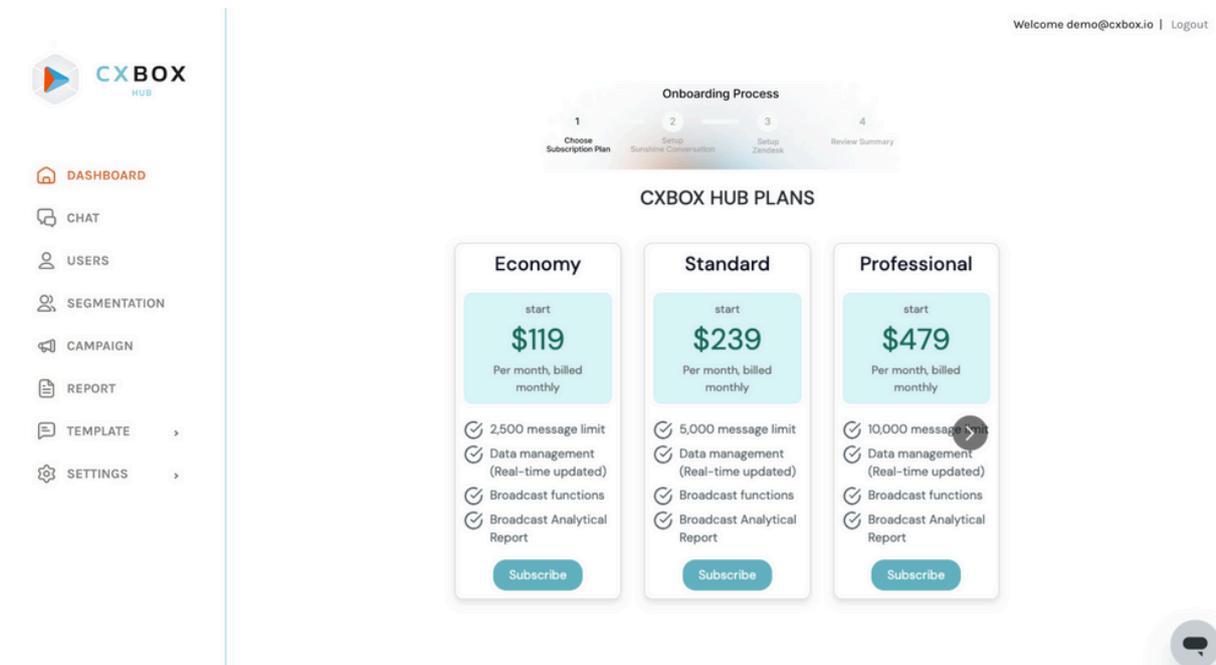

Subscription Plans

After selecting a plan, seamlessly integrate with the Sunshine Conversation API by clicking on the **Next** button.

Sunshine Conversation Setup

In your Zendesk admin panel, navigate to the **Apps and integrations** menu and generate a Conversation API Key. Simply click on the **Create API Key** button, name your application (e.g., CXBOX Hub), and securely store the secret key provided.

After creating the key, copy all of the App ID, key ID and secret key, and save them in the CXBOX Hub application.
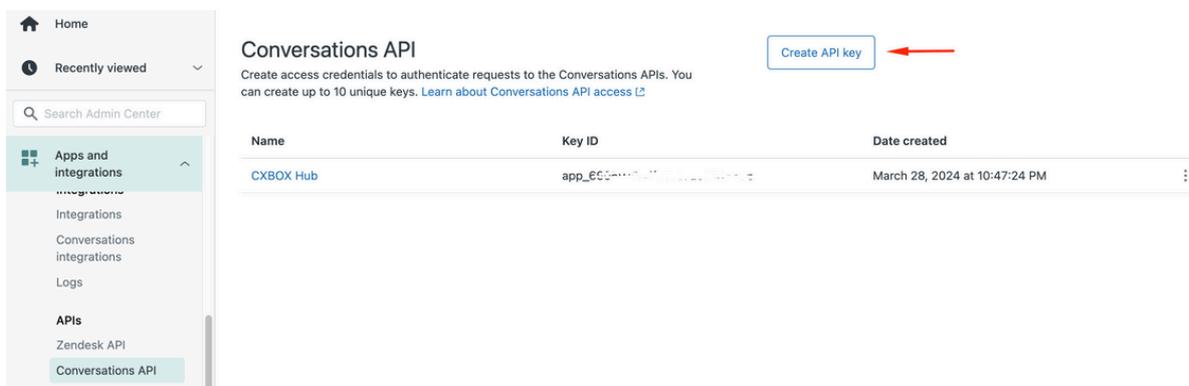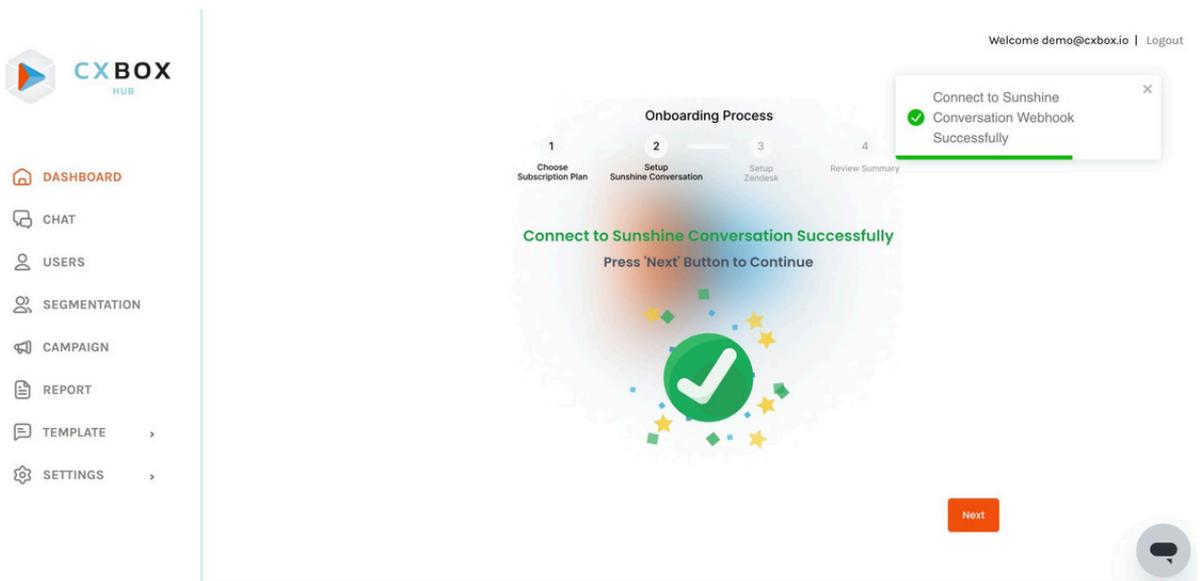

Create conversations API Key in Zendesk
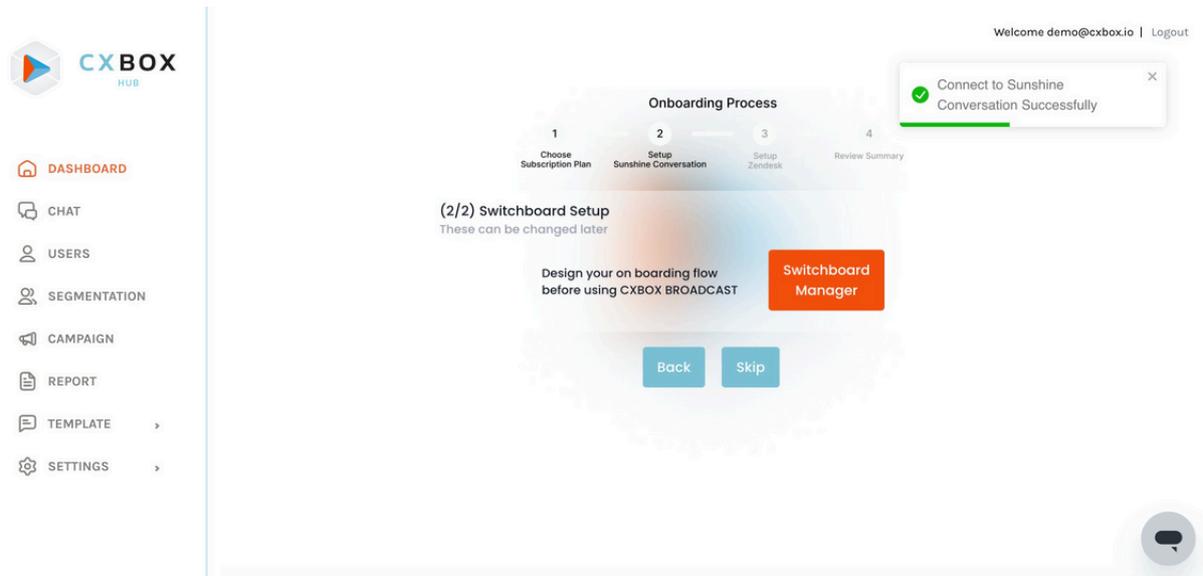
Successful Integration Popup

You can proceed by configuring the switchboard manager with specific keywords to transition between Zendesk and CXBOX, or configure it later.

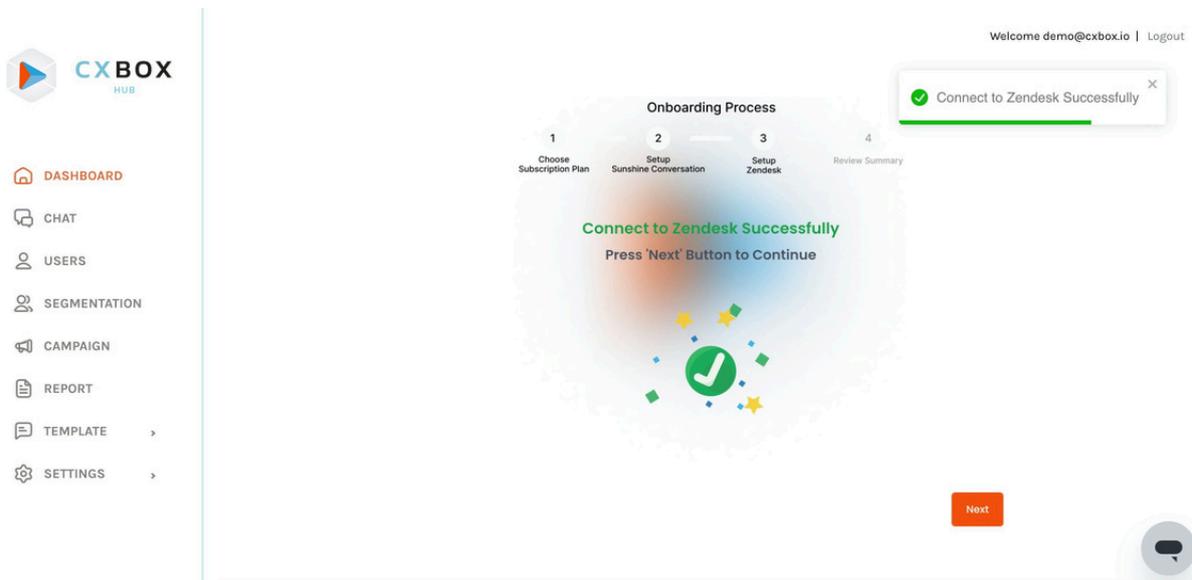Successful Integration Page - Sunshine Conversation

To set up your Zendesk account, create an API token in the Zendesk API, then copy the API token and paste it into CXBOX Hub.
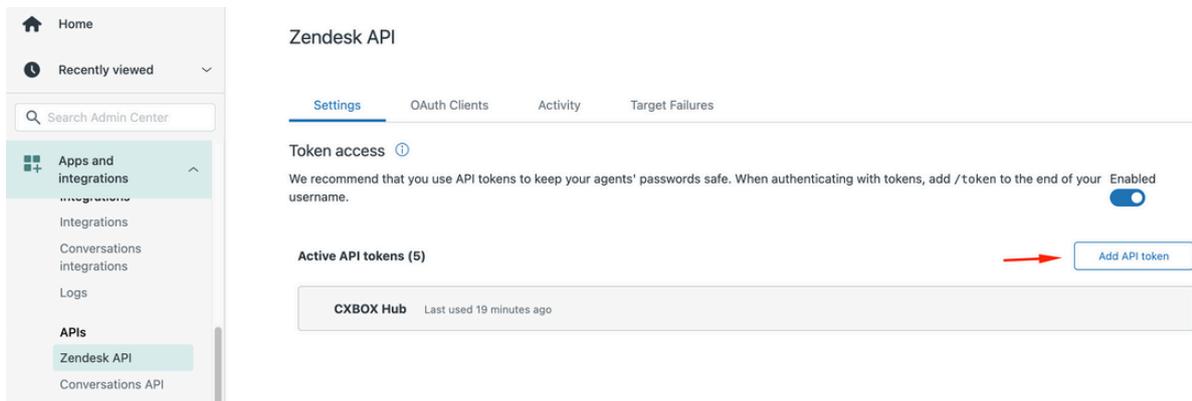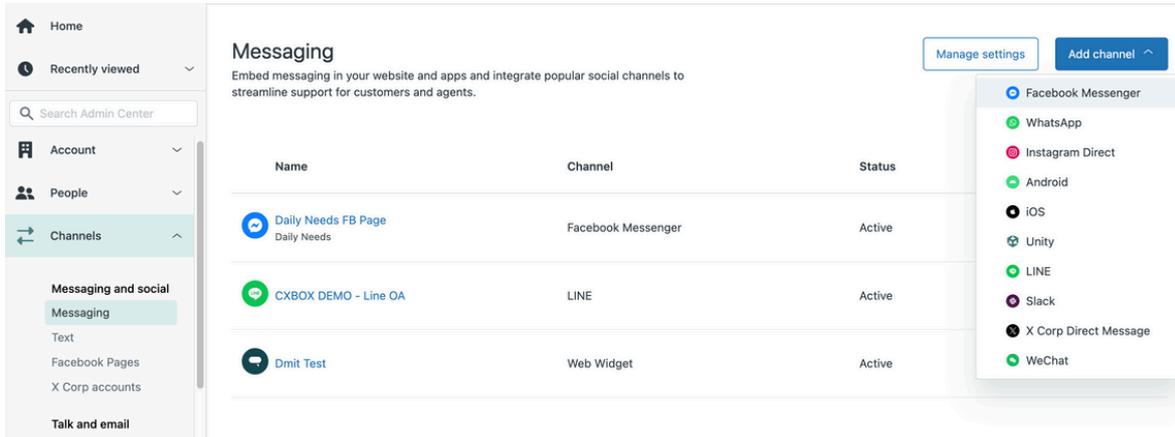

Create Zendesk API Key in Zendesk

After creating the token, copy the token and save it in the CXBOX Hub application. The integration process is complete, and CXBOX is now ready to use.

Successful Integration Page - Zendesk

Messaging Channel

To link your social media channel with the CXBOX Hub, you must add the channel in the Zendesk admin center.

Connect social media channel at messaging

If you did not find out the channel in CXBOX Hub that has been connected in Zendesk admin center, please click "Sync Channel" button to see the recently added channel.

Clicking the "Setup" button next to the Line OA channel will provide guidance on how to connect the Line API with CXBOX Hub, enabling you to send campaigns using the Line API.
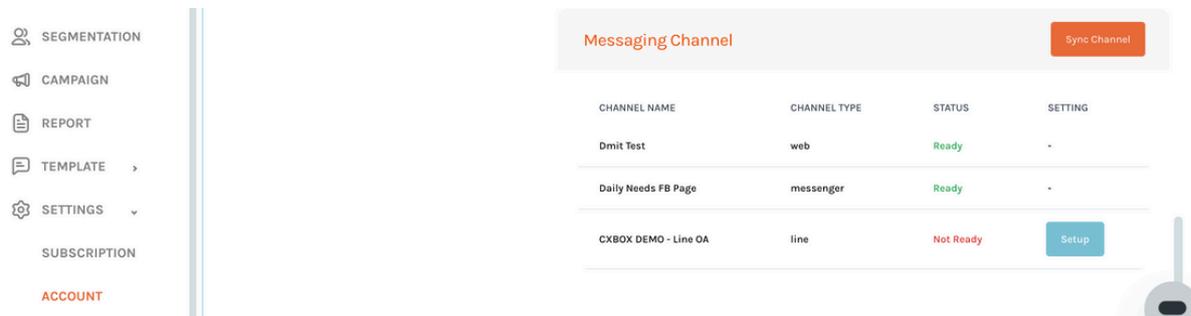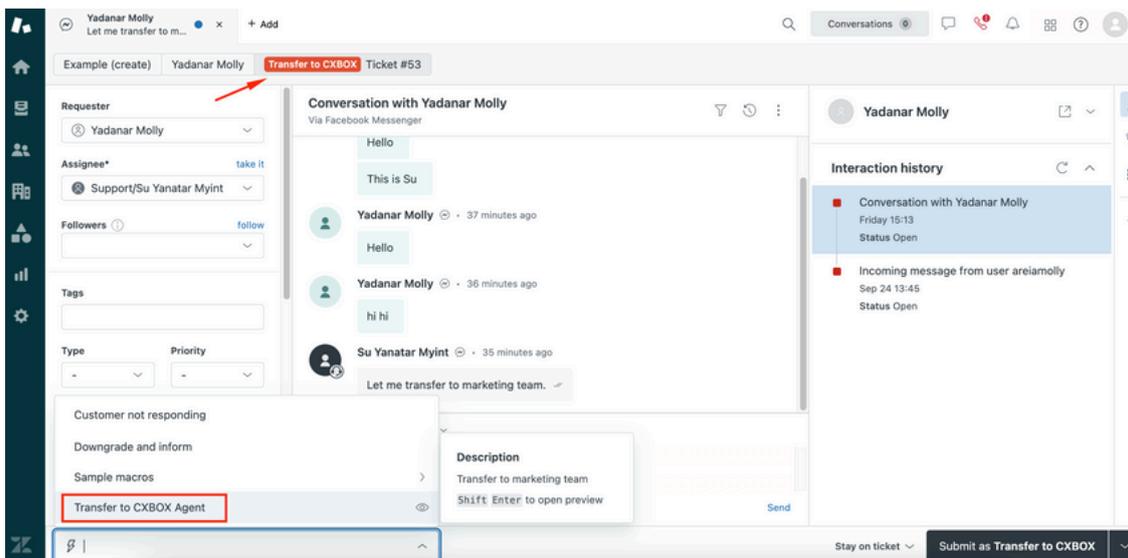

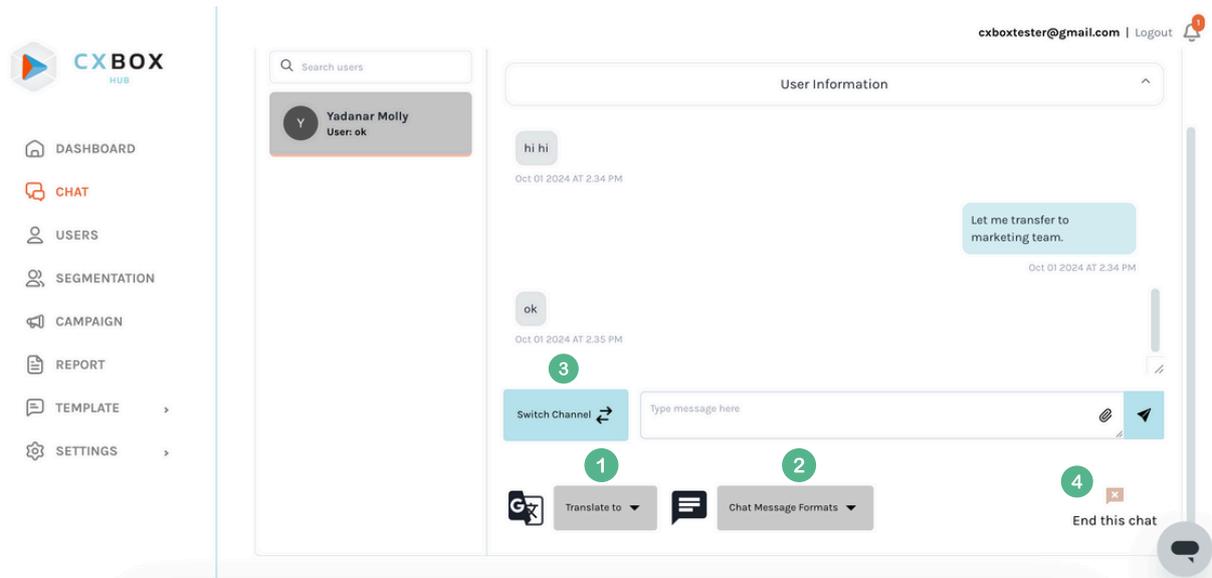Simply Drag & Drop to import user data

Switchboard

According to your keywords in the switchboard settings, Zendesk will allow you to switch the channel from Zendesk to CXBOX. After switching the channel to CXBOX, you can communicate with customers seamlessly.
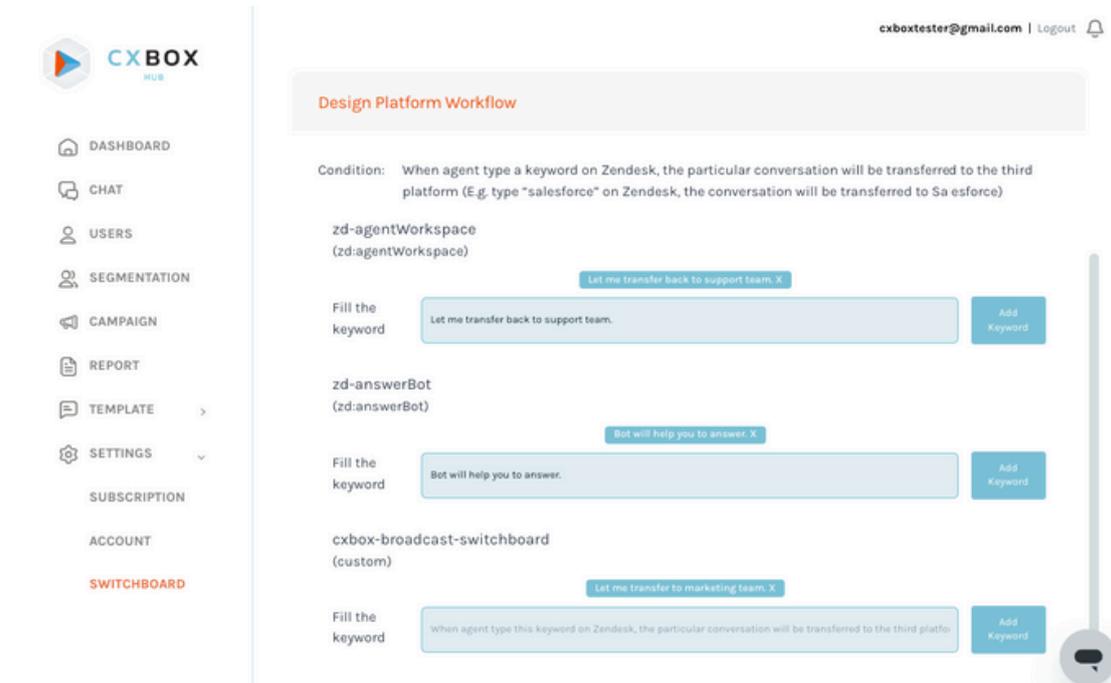
Switchboard keywords in CXBOX

Set the switchboard keywords and ticket status in macro

Conversation is switched to CXBOX

Main Features:

1. Multiple translation languages are available to assist with translating chat messages.
2. The preset message from "Message Format" will mirror a macro in Zendesk. You can predefine the messages at the message format template.
3. If necessary, you can switch the platform from CXBOX to Zendesk agent or CXBOX to Zendesk bot.
4. Once the customer's questions are resolved, the agent can conclude the conversation by selecting "End this chat" and all of the conversations will be synchronized to Zendesk ticket.

Chat

Agent is able to use CXBOX Hub as the one-stop place for handling all customer conversations - whether they are customers from Messenger, Line, WhatsApp, it makes it easy and seamless to serve the customer's requests without having to needlessly switch platforms.

Note:

- Facebook Messenger allows a business only seven days to respond to the end user before the messaging window closes. To prevent messages from being sent but not delivered, the composer will be blocked once the messaging window is closed. The only way to re-open is if the end user sends a new message. For more details click here.

- Messenger also has a limitation whereby broadcast can only be done within a 24-hour window.

- Agents can seamlessly switch between Zendesk, CXBOX Hub, as well as chatbot, allowing for seamless transitions during conversations.
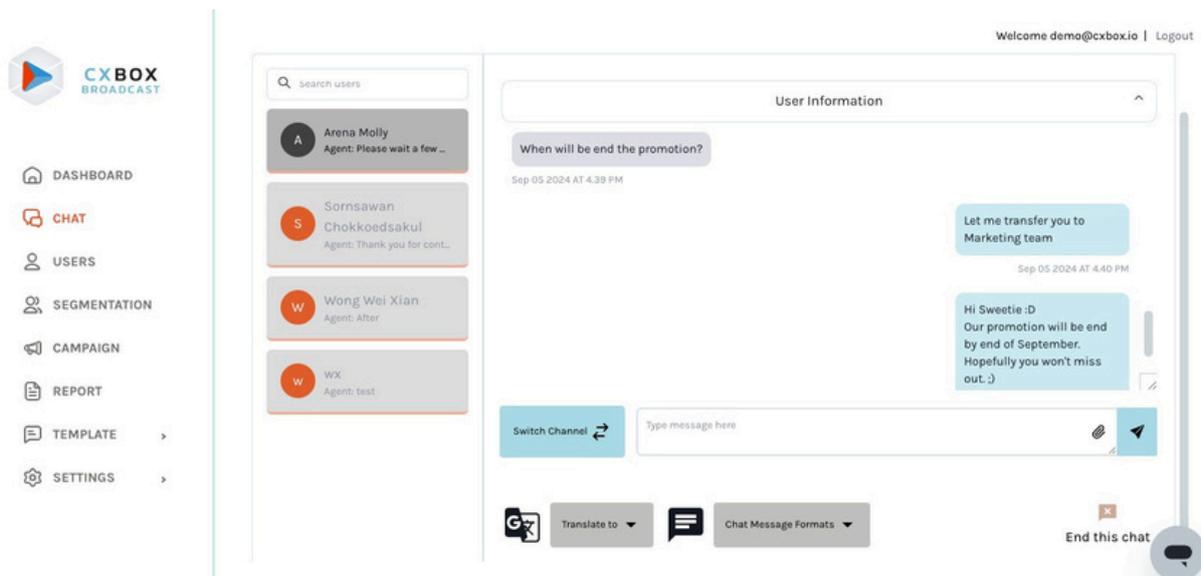
Conversation is switched to CXBOX

User List

All users from various channels will be displayed on the user list, either by importing a CSV file, after engaging in conversations with customers or synchronizing with Zendesk.

User List

Import Users

There are two options to import the user information into CXBOX Hub by uploading CSV file and synchronizing with your Zendesk account.

Initially, you may need to synch with Zendesk before uploading the CSV file. Once the synchronizing is done, CSV file will be able to upload into CXBOX Hub.

Click "Import Users" Button to import

Feel free to download the CSV file template as a reference.

Simply Drag & Drop to import user data

Segmentation

Segmentation allows you to filter user groups when sending campaigns to specific users. In CXBOX, you can establish multiple conditions to filter users according to specific criteria. All fields are synchronized with your Zendesk and Line accounts.
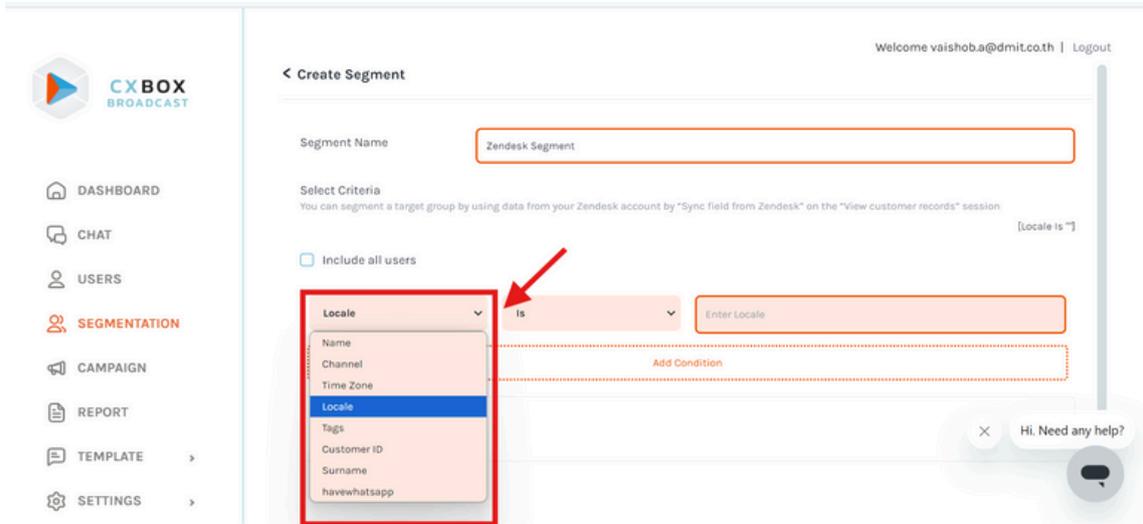
Note:

- Agents cannot send campaign messages to users after 24 hours if they are using Facebook Messenger.

- Agents can upload or merge users using the CSV file upload feature.

- If a CXBOX client's Zendesk account was registered in early 2022, campaign messages cannot be sent to Line users via the Zendesk API. However, these messages can still be sent using the Line API. You may need to setup Line API at the messaging channel.

- The total number of users in the Line channel is not visible when creating segments or campaigns using the Line API. However, the user count is available when using the Zendesk API.
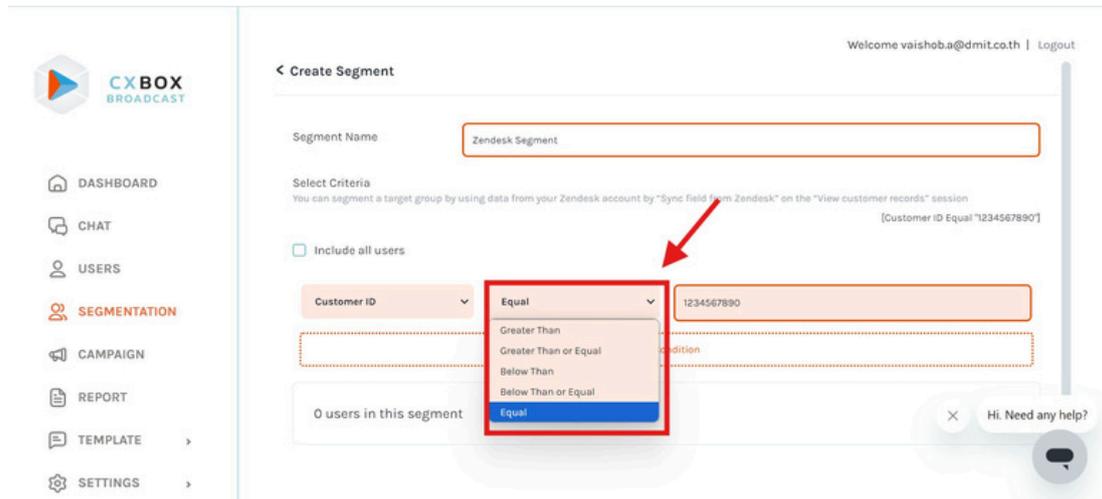
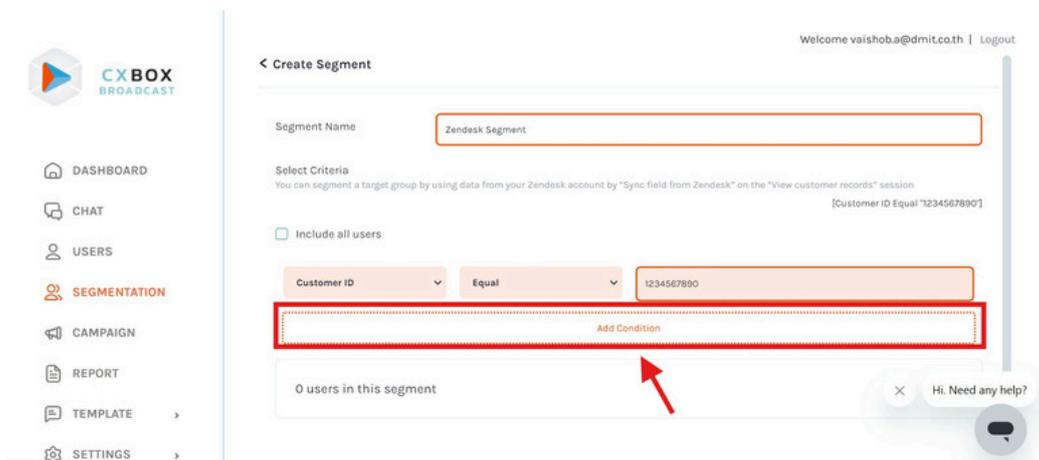## Example 1: User chooses Zendesk Segment

User clicks on "Create Zendesk segment"
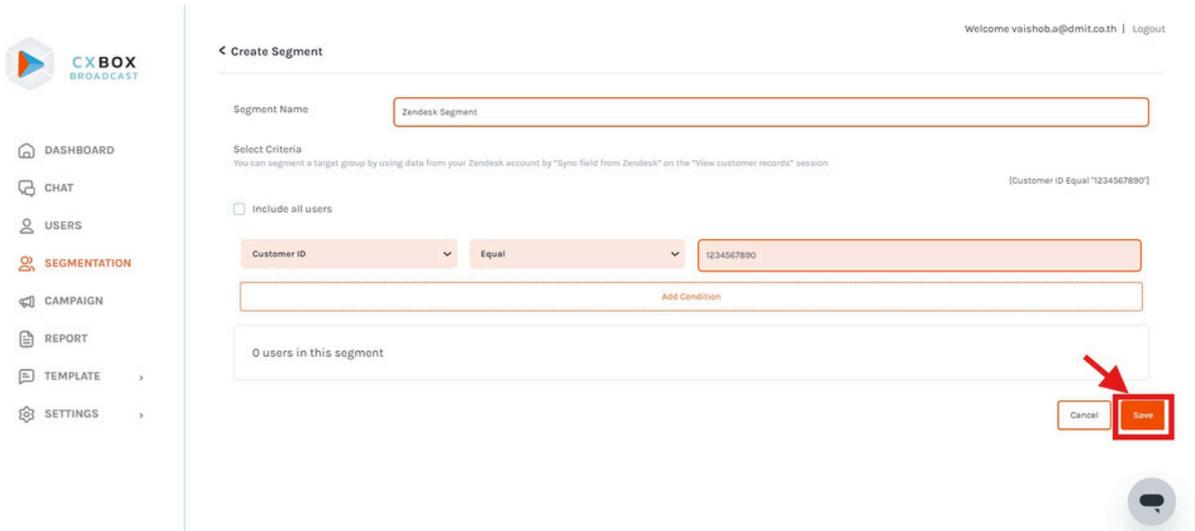
User clicks on dropdown menu to choose selection criteria

Based on selection the middle and right-hand side dropdown menu displays the available options to select from
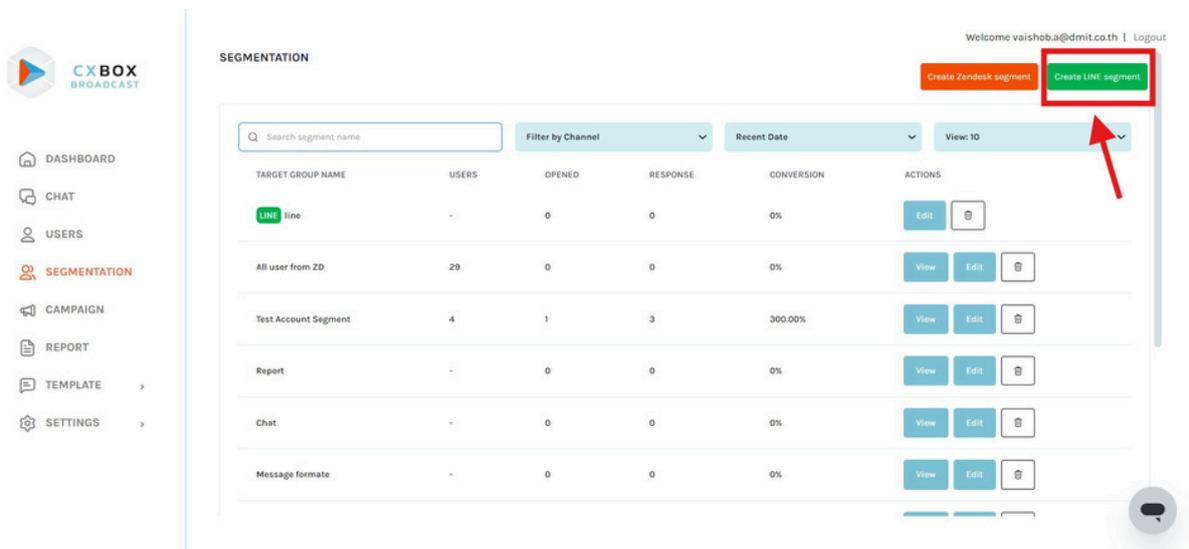

User may have multiple selection criteria for the same segment

Once done, User clicks "Save" to save the settings for the current segment

Example 2: User chooses Line Segment

User clicks on "Create Line segment"

User clicks on dropdown menu to choose selection criteria

User can choose to filter by a specific region

User saves new segment settings

Campaign

The campaign list displays the number of campaigns that are scheduled, sent, or in draft. Utilize the calendar to locate ongoing, upcoming, and past campaigns. Create and launch your campaign using segments and channels. There are four content types to select from: text, image, file, and carousel.

You have the flexibility to send the campaign immediately or schedule it for a specific date and time. Additionally, CXBOX Hub offers the option for recurring campaigns.

Campaign overview

Create a Campaign

Report

The Report page provides users with comprehensive metrics on their campaigns, segments, and channels. Users can filter reports by specific time periods to gain insights into their marketing and customer service performance. Overall campaign success are displayed in easy-to-read charts, graphs and metrics such as total sends, total reach, total unique clicks, total clicks, total replies and total actions. This functionality allows users to evaluate the impact of their efforts and make data-driven decisions for future campaigns.
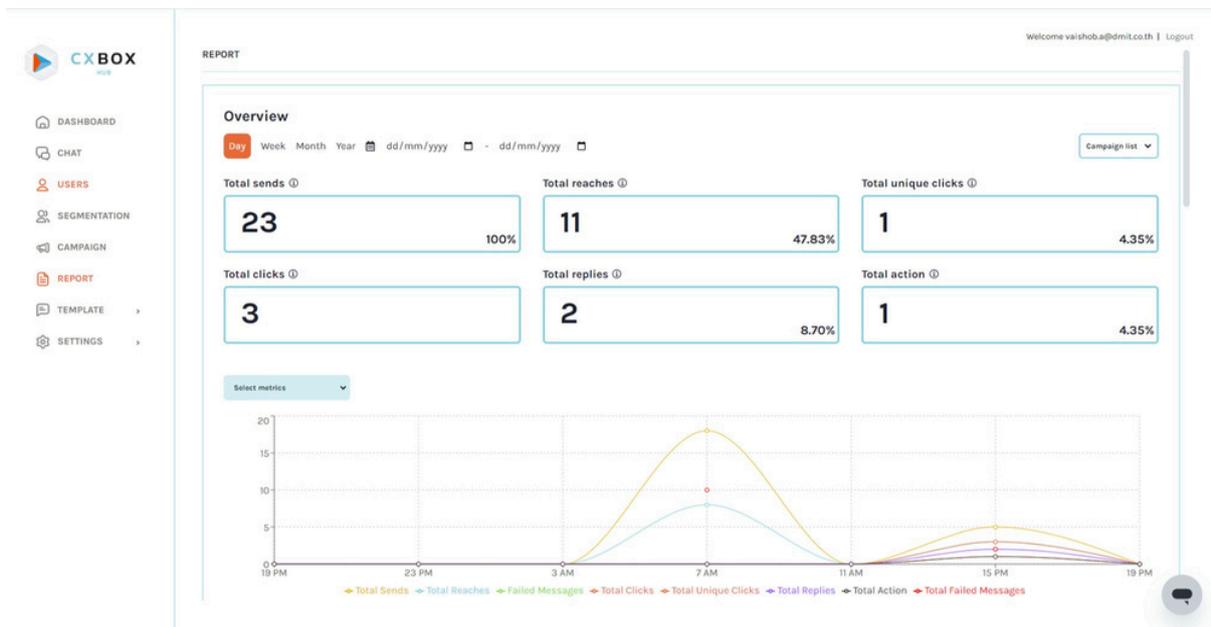
Main Report Dashboard

Showing by Segment, Channel

All Campaigns

Campaign Comparison

Filter by time period

Templates

Preset messages in message formats can be beneficial for saving time for agents when handling customer inquiries, especially in live chat conversations. These templates can be customized to cater to various customer scenarios, such as order confirmations, delivery updates, or service inquiries.

WhatsApp Template

The **WhatsApp Template** functionality allows agents to set up predefined messages. These messages can include text-only or text accompanied by images, offering a variety of options for communication.

After creating the Whatsapp template, you many need to wait Whatsapp's approval and it will take at least 2 hours.

WhatsApp Template

Message Format

The **Message Format** feature enables users to create pre-configured responses that can be quickly deployed during customer interactions. These templates support various content formats, such as text, images, and files, and can be customized based on the specific needs of different campaigns or customer inquiries. It functions similarly to a "macro" in Zendesk.
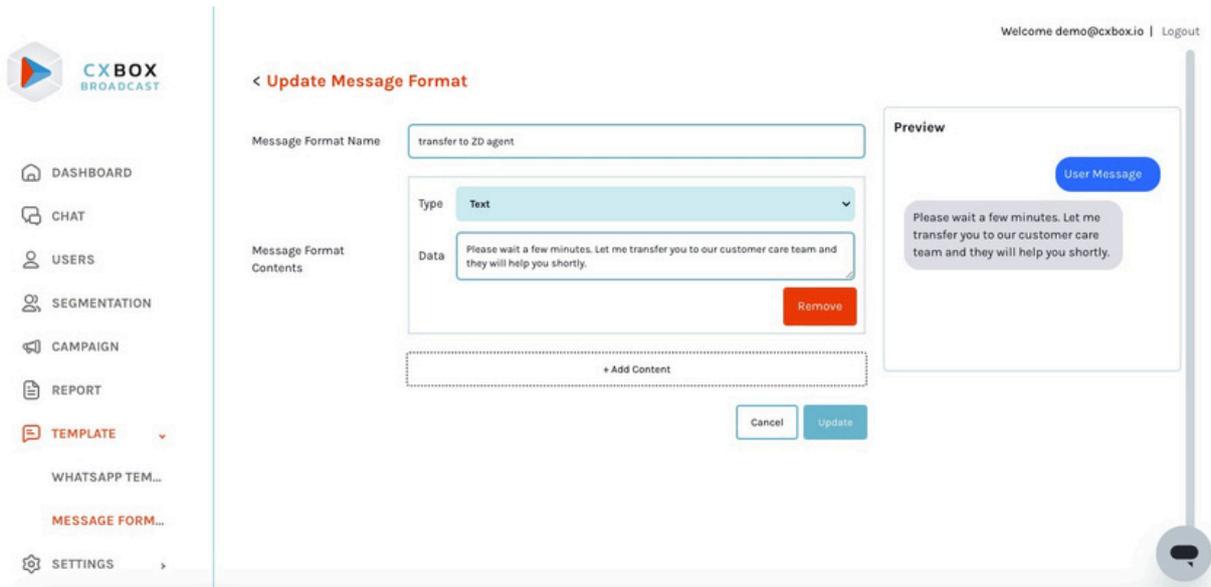
Update Message Format
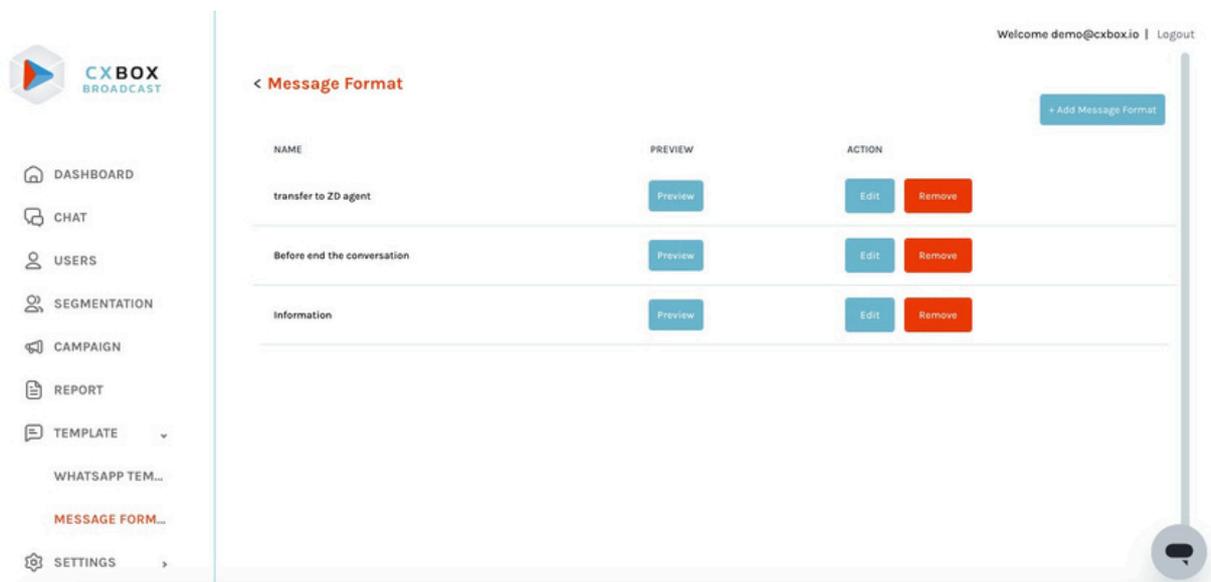
Message Format

FAQs

Q1: What should I do if I encounter an error during integration?

A1: Ensure that all API keys and credentials are correctly entered. If the issue persists, contact support at support@cxbox.io or submit the request via support portal.

Q2: How do I reset my password?

A2: Click on "Forgot Password" on the login page, and follow the instructions to reset your password.

Q3: How many channels can CXBOX Hub connect?
A3: CXBOX Hub connects with customer channels via Zendesk Conversation API. Here is the list of channels supported by Zendesk Conversation API.

Best Practices & Tips

- **Optimizing Response Time:** Utilize preset message formats to quickly respond to customer inquiries.

- **Segmentation Strategies:** Filter user groups effectively for targeted campaigns to increase engage ment.

- **Regular Updates:** Keep your integrations and API tokens updated to avoid disruptions in service.

Glossary

- **API Key:** A unique identifier used to authenticate requests associated with your project.

- **Macro:** A set of instructions that automate tasks in Zendesk.

- **Segmentation:** The process of dividing your user base into specific groups for targeted marketing.

CXBOX's Products

Discover more about how CXBOX can enhance your business's customer service. Visit our website for additional resources or contact our support team for personalized assistance.

On the Zendesk Marketplace, we offer two products under the CXBOX brand:

CXBOX Commerce

- Centralizes all eCommerce customer inquiries, making it easier than ever to respond promptly and efficiently.
- Able to integrate with eCommerce platform such as Lazada and Shopee.

   Key Features:

   - One-stop shop for all eCommerce customer inquiries.
   - Able to interact with customers in real time via every channel on a single platform
   - Rapidly verify customer order details

CXBOX Commerce - Shopify

- Able to search the order information within Zendesk

CXBOX Hub

- Deliver personalized broadcasts in social media channels at once
- Able to understand customer engagement and retention with powerful insights

   Key Features:

   - Segmentation function for targeted campaigns
   - Seamless communication with customers outside Zendesk
   - Switchboard function for seamless transition between Zendesk and CXBOX Hub platforms, ensuring smooth conversation flow with customers.