CXBOX Hub

User Manual Guide

CXBOX HUB

All-in-one application for better customer service

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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.
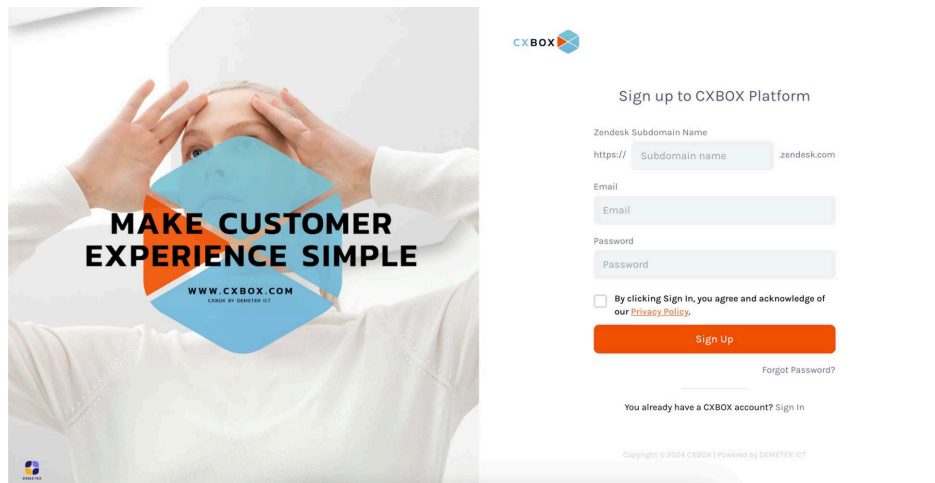
CXBOX Hub Integration

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. Fill in your Zendesk subdomain, email, and password. You will receive an email notification to confirm your account.
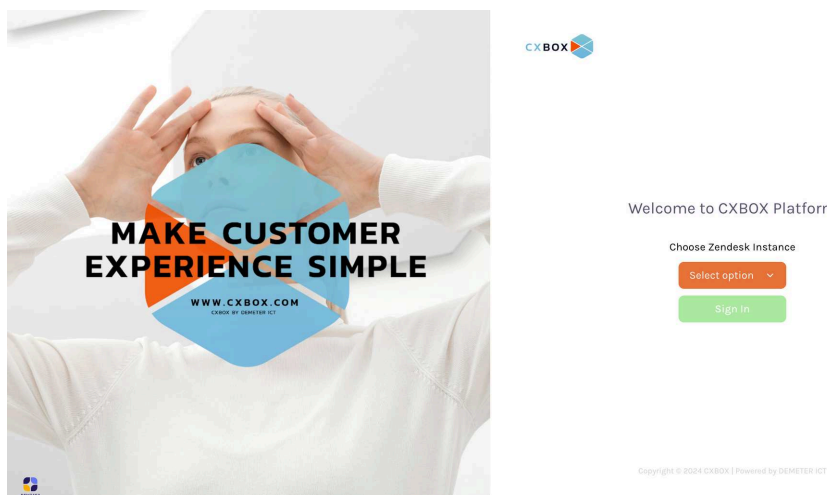

Sign up page

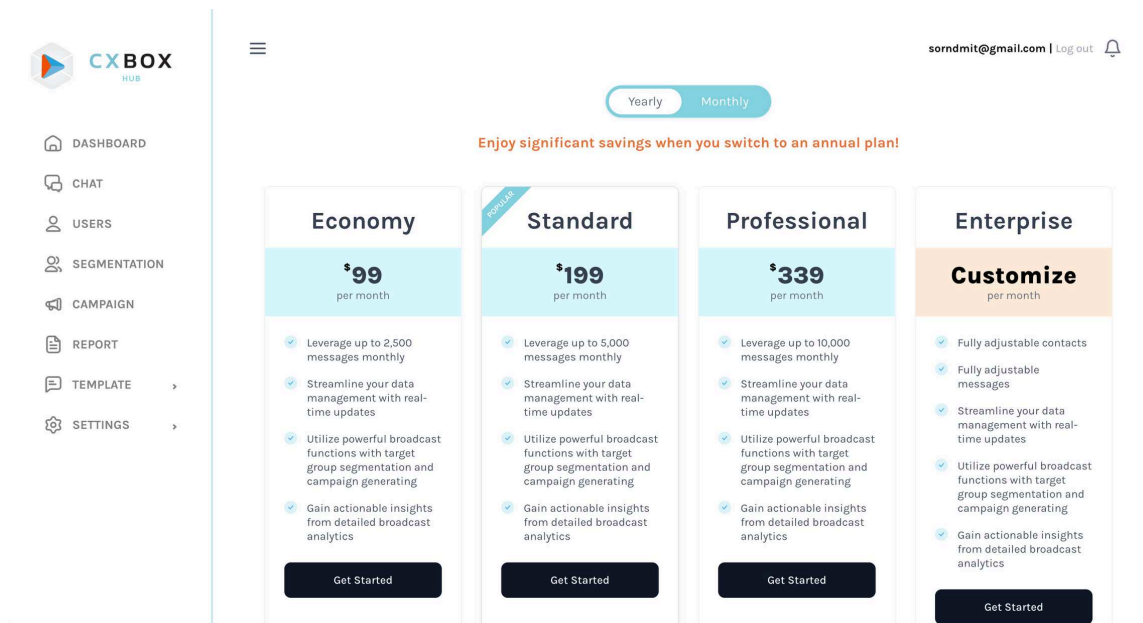After creating an account, you can log in to the CXBOX Hub dashboard.

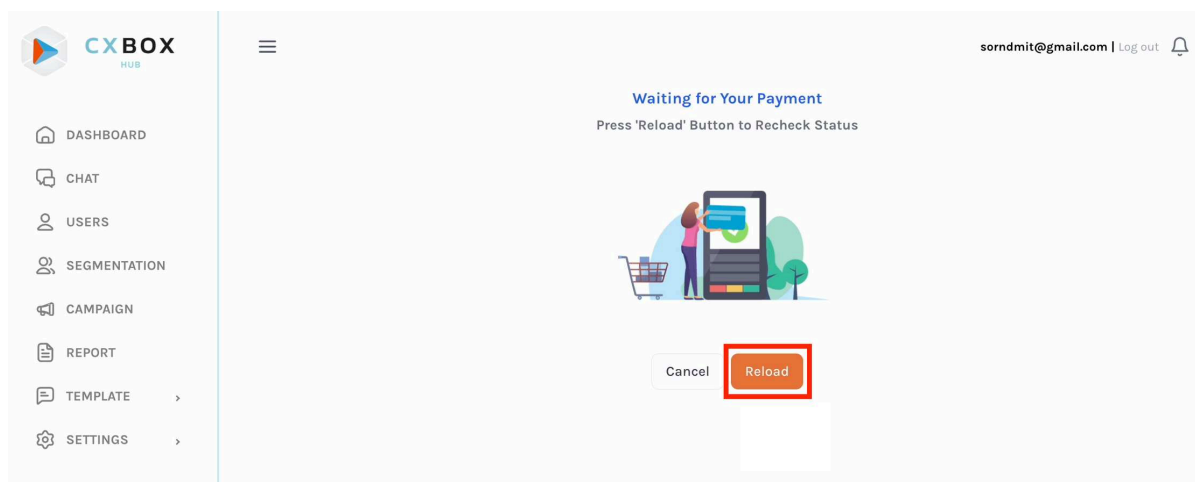User fill in Email Password and consent to signing in.

User selecting the Zendesk subdomain and sign in

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

Selecting the Subscription Plan

Adding your payment after clicking "Reload" button

After adding your payment, seamlessly integrate with the Sunshine Conversation.

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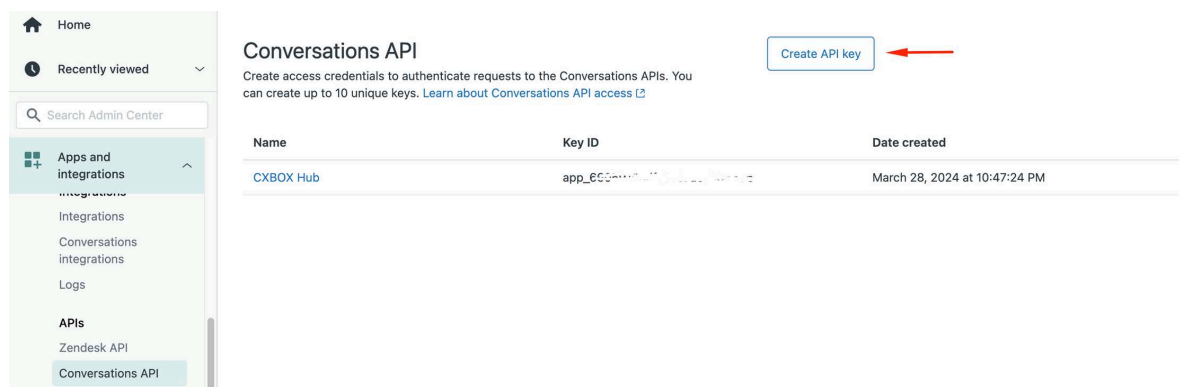
Create conversations API Key in Zendesk

Copy the App ID, Key ID, and Secret Key after creation, then click "Test Connectivity" button to save them in the CXBOX Hub.
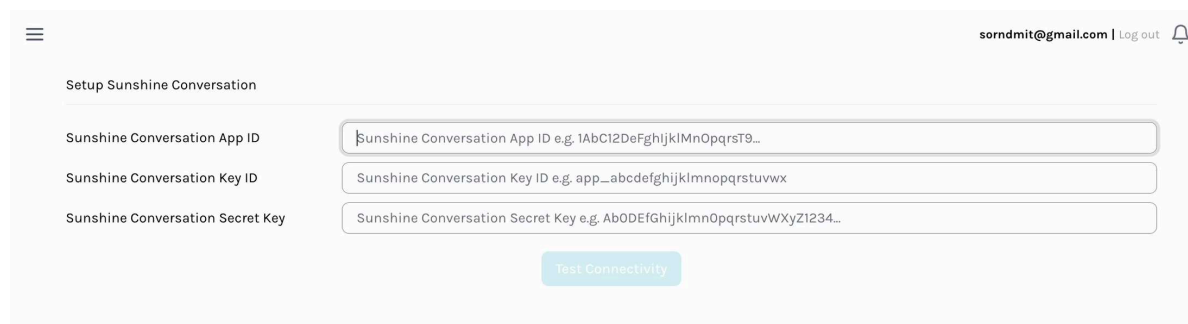
Sunshine Conversation Setup

To set up your Zendesk account, create an API token in the **Zendesk API**, then copy the API token.
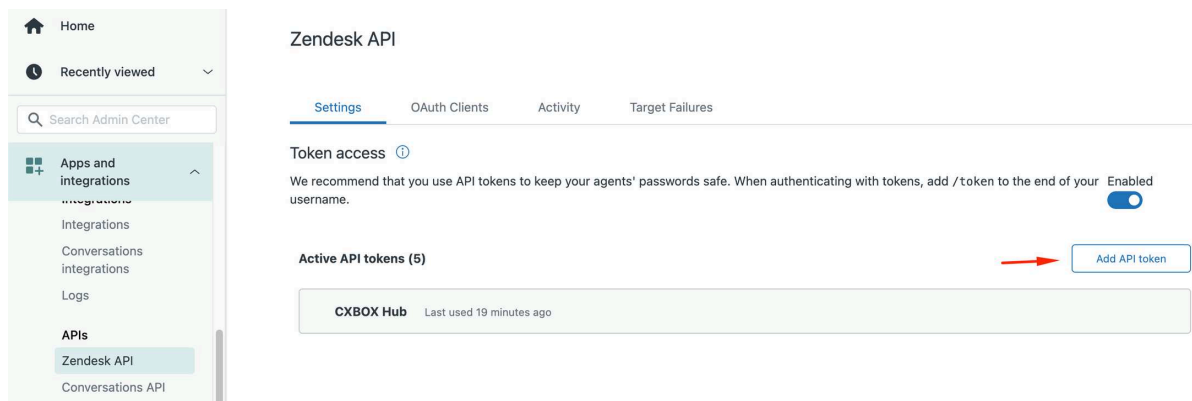
Create Zendesk API Key in Zendesk

After creating the Zendesk API token, return to the CXBOX Hub. Enter your Zendesk login email and paste the generated API token. Verify your Zendesk subdomain name. If incorrect, contact CXBOX support at support@cxbox.io. Once the **Test Connectivity** is successful, the integration is complete, and the CXBOX Hub is ready for use.

Zendesk API Setup

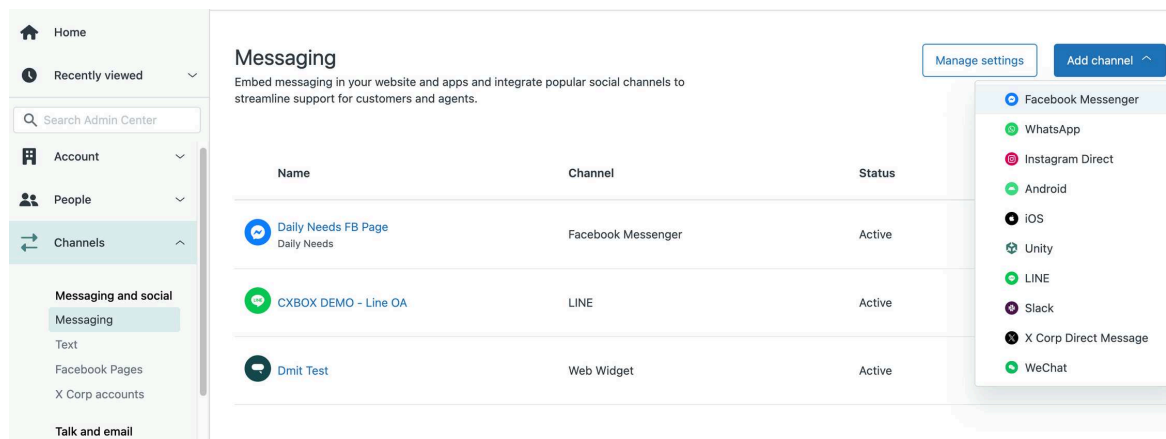# Messaging Channel

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 couldn't find out the channel in CXBOX Hub after connecting in the Zendesk admin center, please click the "Sync Channel" button to see the recently added channel.

Clicking the "Add Channel" button in the native API (Line, Facebook, WeChat) channels section will provide guidance on how to connect each channel, enabling you to send campaigns and messages using the native API.

Utilizing the Line Native API for campaign sending provides the capability to include Rich Content. Furthermore, establishing Native API connections for Facebook and WhatsApp unlocks the Opted-in feature, which is beneficial for bypassing the limitations of the 24-hour messaging window on these platforms.
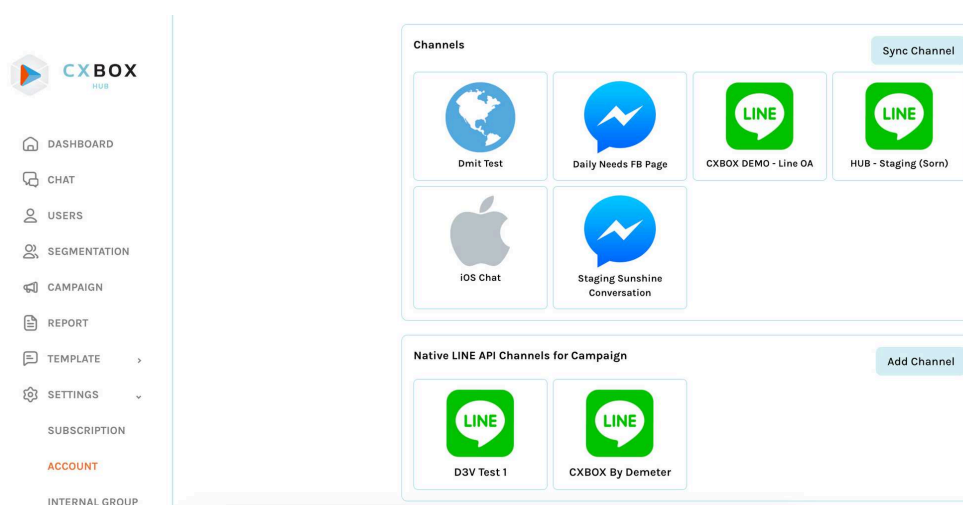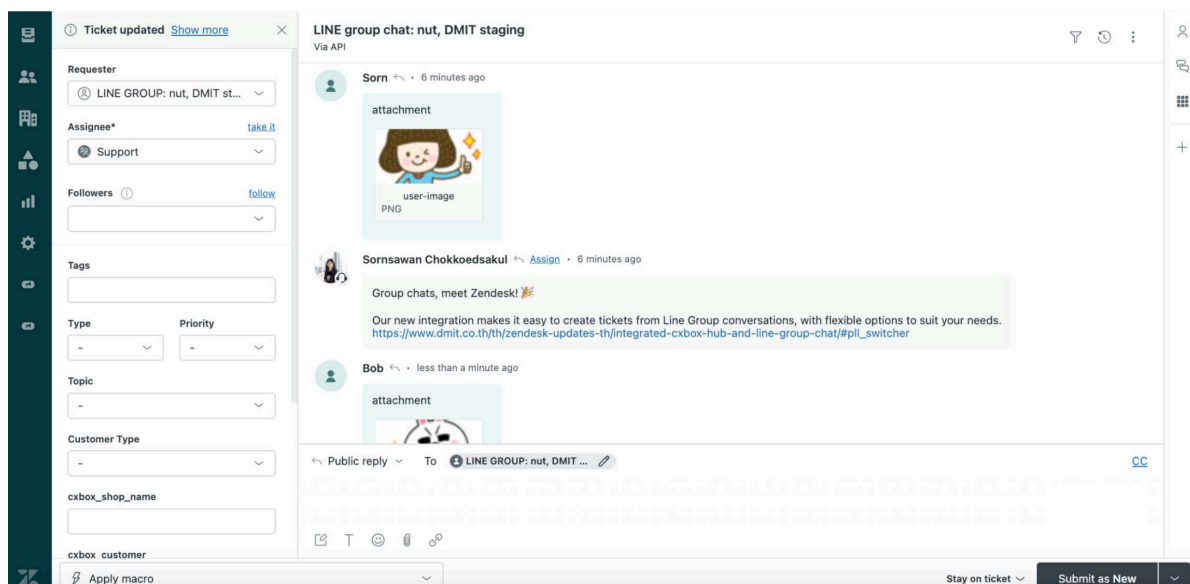

Channel list

Line Group
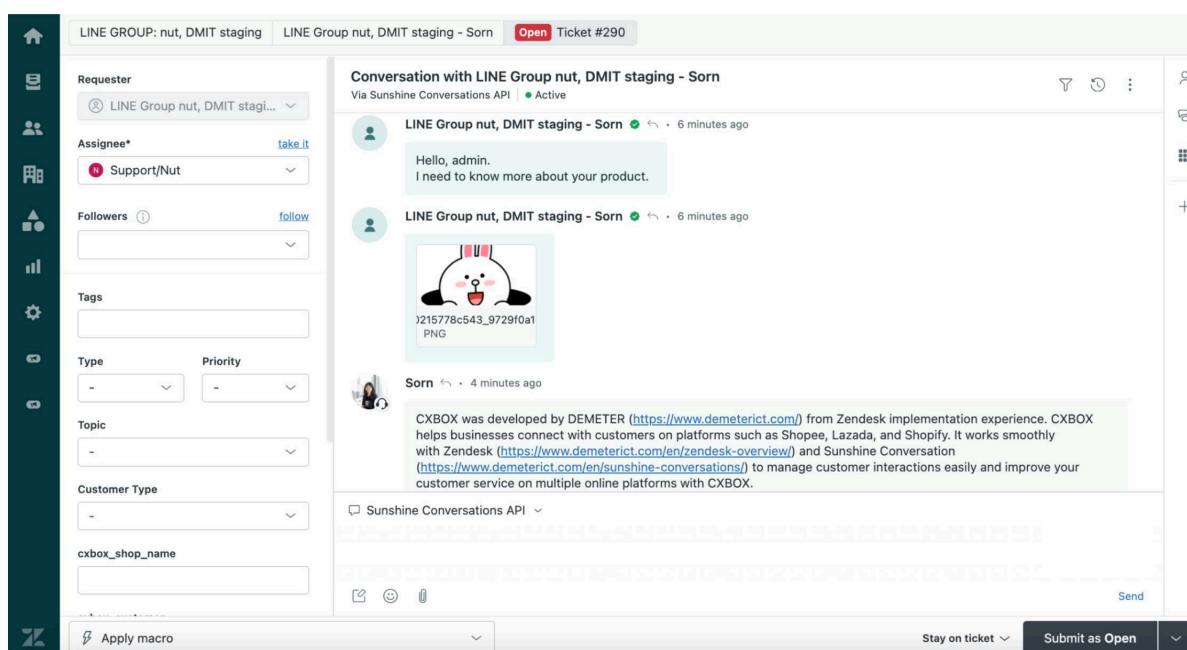
The Line group can display Zendesk ticket conversations in two ways. First, it can update a single ticket for the entire chat using the Zendesk API (Rate limit is 30 messages/10 minutes). Second, it can create individual tickets for each user using the Sunshine Conversations API, as shown below.

Single ticket for each LINE group chat

Multiple tickets for each LINE group chat's member

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.
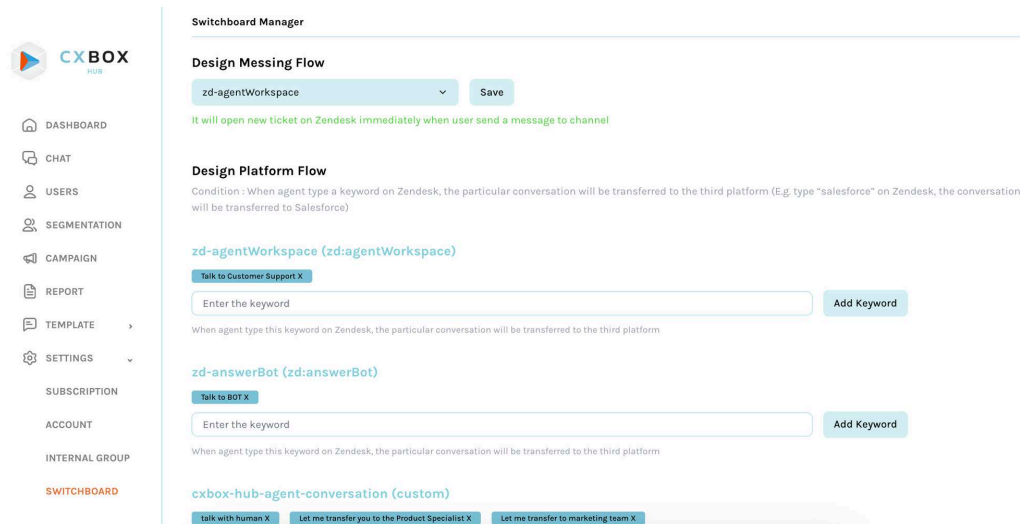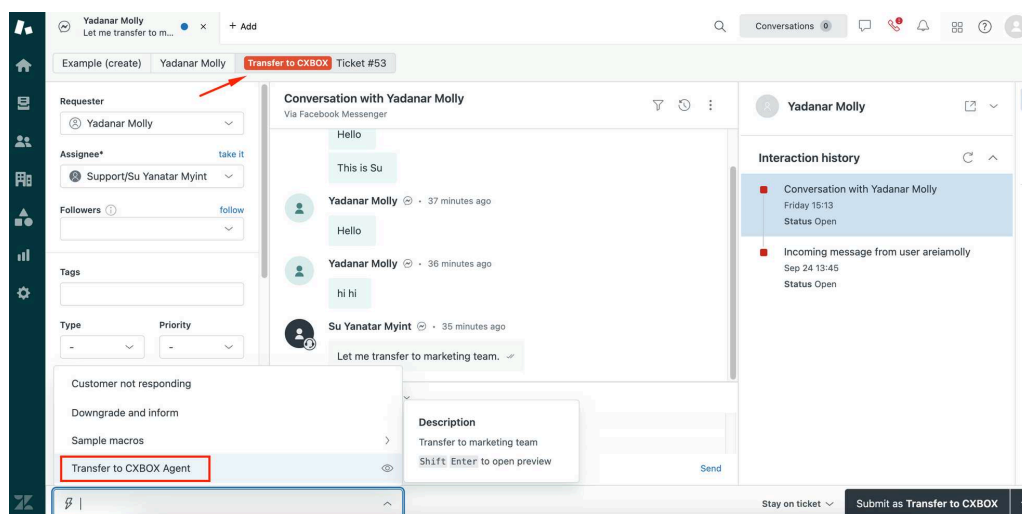

Create Message Format

Message Format list

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 Hub, you can communicate with customers seamlessly.


Switchboard keywords in CXBOX

Set the switchboard keywords and ticket status in macro

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:

- <u>Facebook Messenger</u> 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 <u>here</u>.

- However, if your Facebook Page has opted in for extended messaging, you can send campaign messages outside of this 24-hour window

- Agents can seamlessly switch between Zendesk, CXBOX Hub, as well as chatbot, allowing for seamless transitions during conversations.
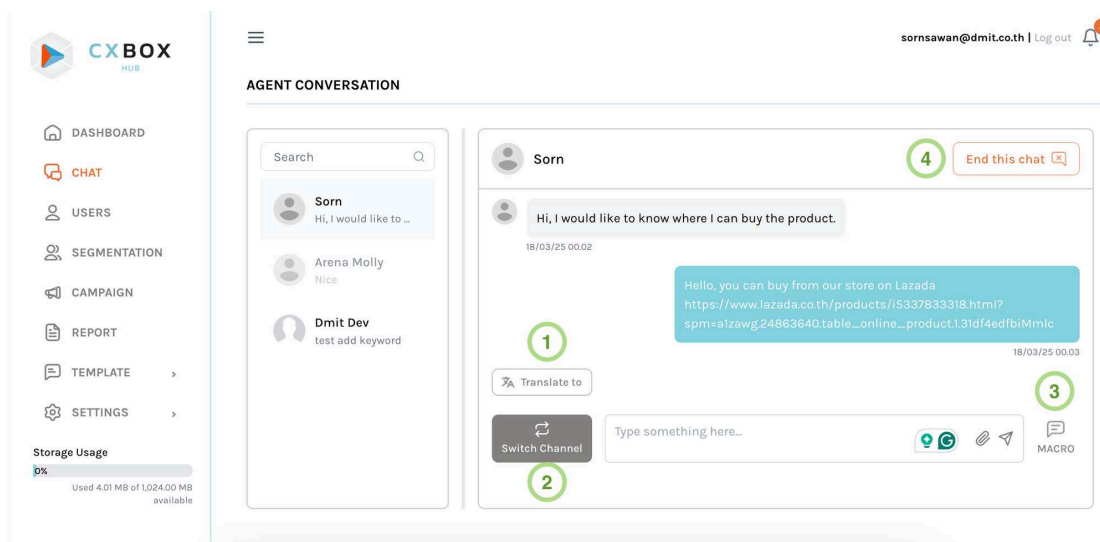
Chat Feature

Main Features:

1. Multiple translation languages are available to assist with translating chat messages.
2. If necessary, you can switch the platform from CXBOX to Zendesk agent or CXBOX to Zendesk bot.
3. The preset message is "Macro", which you can pre-define at the message template.
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.

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

User Profile

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.
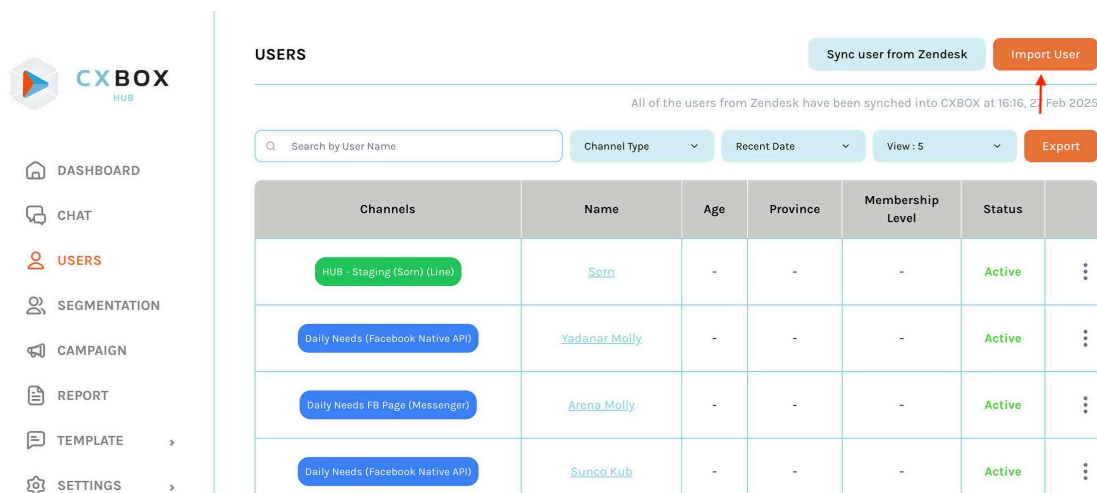
Click "Import User" Button to import

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

Simply Drag & Drop to import user data

There are two options to import the user information into CXBOX Hub by uploading CSV file and synchronizing with your Zendesk account.
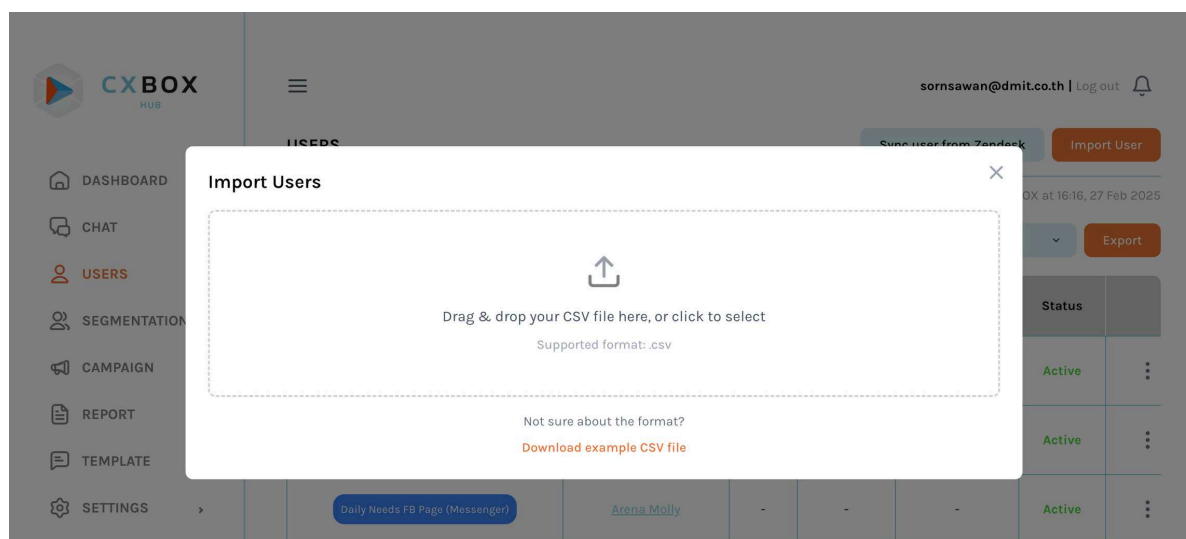
Initially, you may need to synch with Zendesk before uploading the CSV file. Once the synchronizing is done, CSV file will be able to upload into CXBOX Hub.

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, Facebook and Line accounts.

Note:

- Agents can send campaign messages to users within 24 hours of their last interaction especially for Facebook users. However, if your Facebook Page has opted in for extended messaging, you can send campaign messages outside of this 24-hour window.

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

Example 1: User chooses Zendesk Segment

User clicks on "Create segment" Button

The user clicks the Segment type dropdown and selects Zendesk.

Select criteria from the dropdown to filter customers and define this segment

User may have multiple selection criteria for the same segment

Once done, User clicks "Create Segment" 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
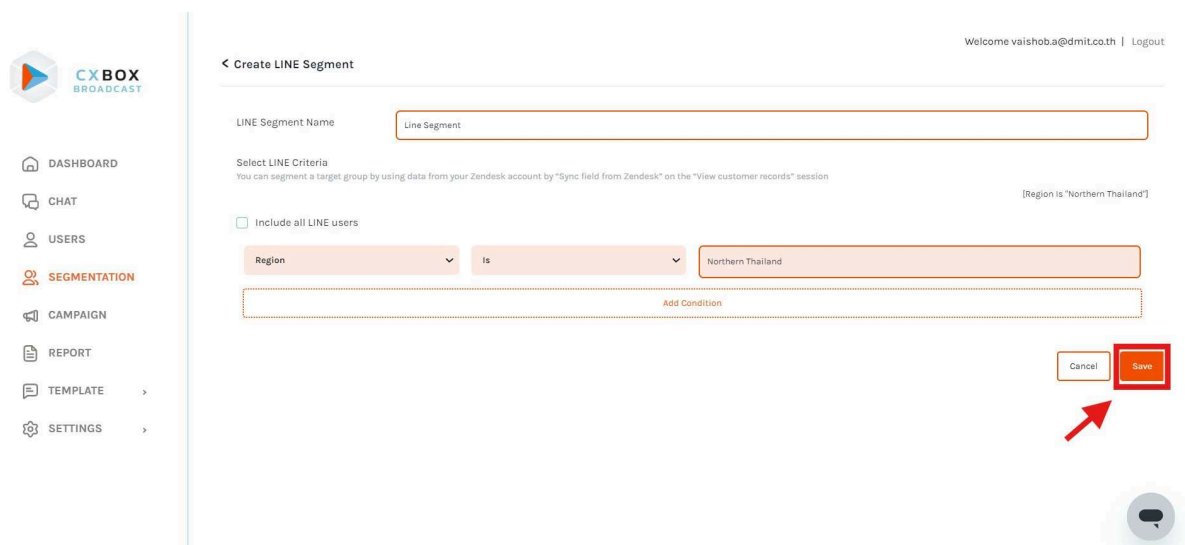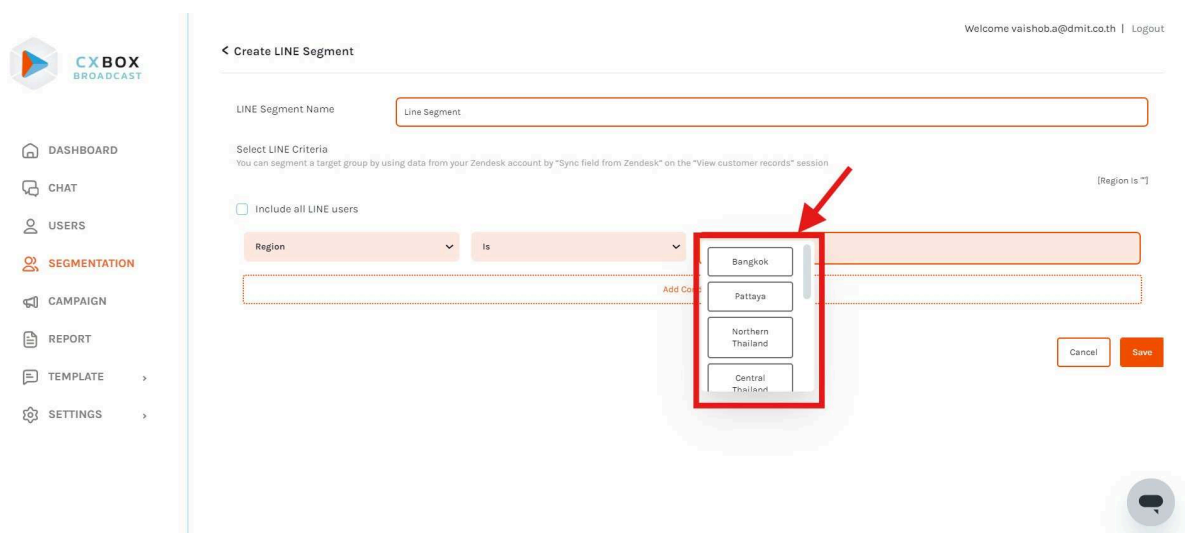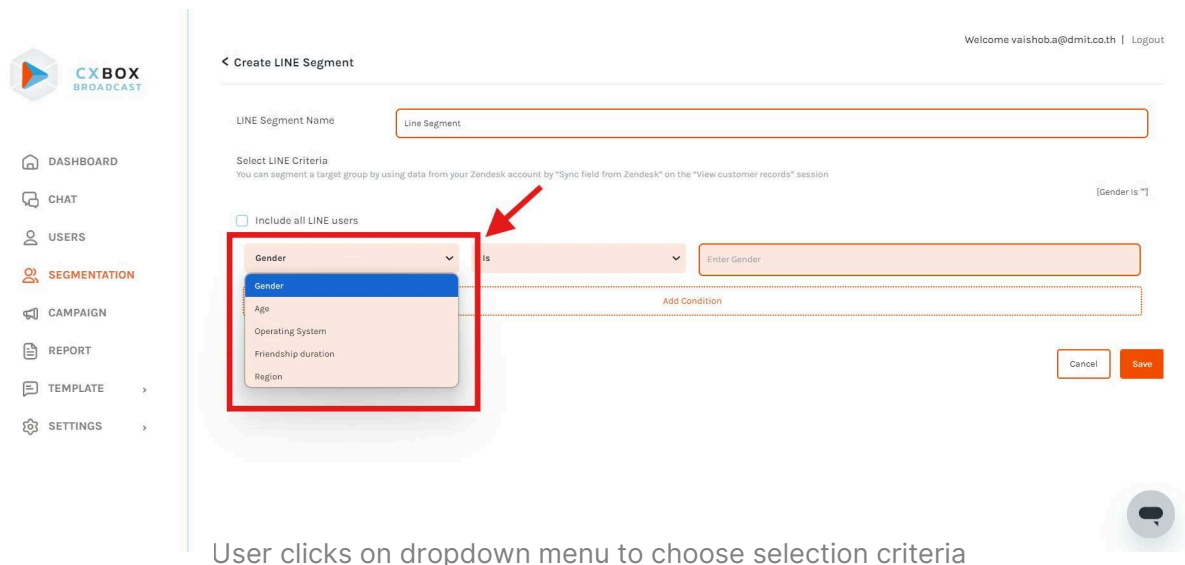
Campaign

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.
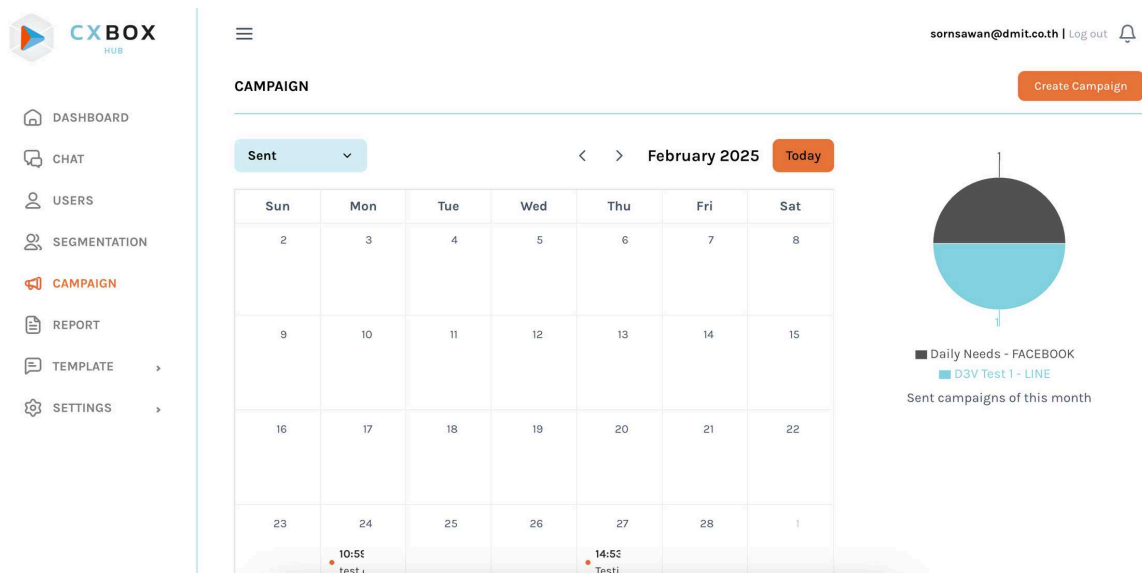
Campaign overview

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 is 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.
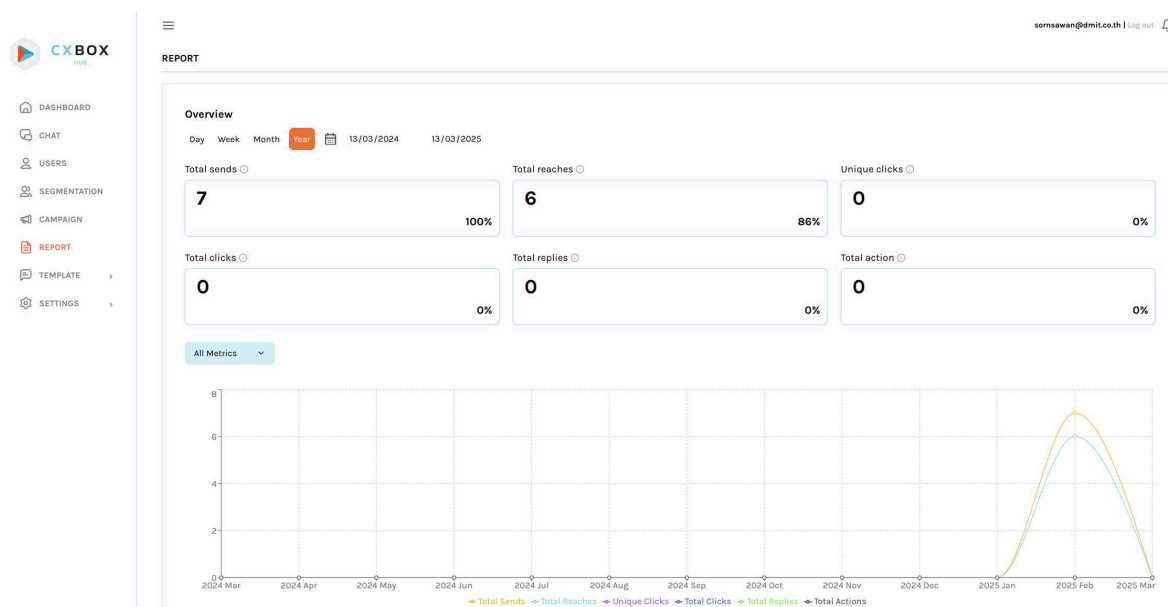
Main Report Dashboard
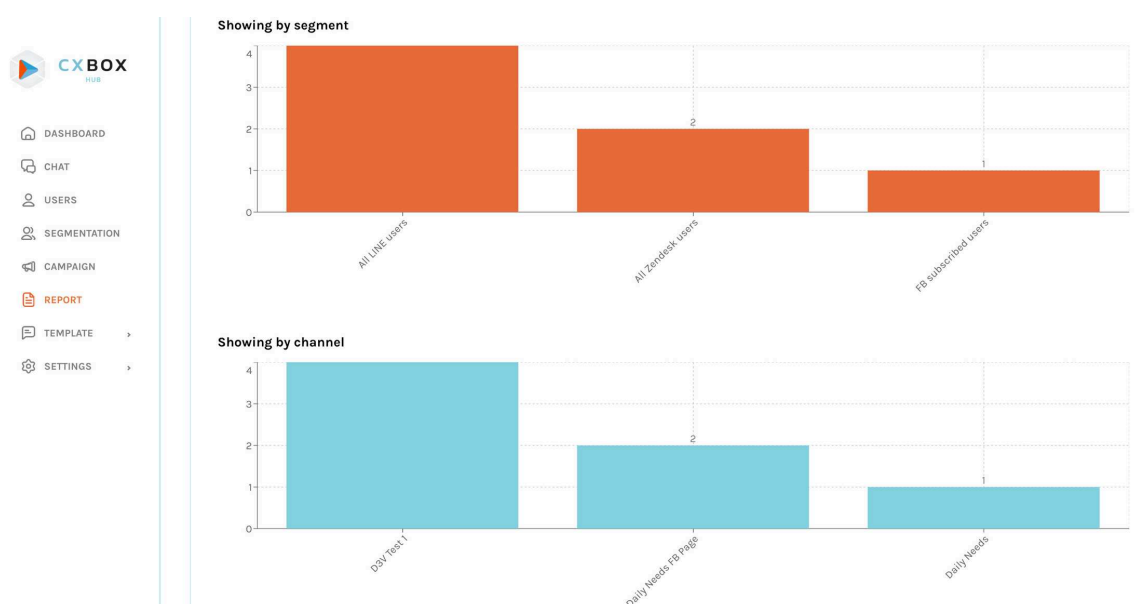
Showing by Segment, Channel

CXBOX
HUB

- DASHBOARD
- CHAT
- USERS
- SEGMENTATION
- CAMPAIGN
- REPORT
- TEMPLATE
- SETTINGS

Campaign Comparison

dd/mm/yyyy   dd/mm/yyyy

Testing FB campaign vs test campaign vs (+)

Total sends	**3**	Total sends	**1**
Total replies	0/3	Total replies	0/1
Action rate	0%	Action rate	0%
Total reaches	2/3	Total reaches	1/1
Total clicks	0/3	Total clicks	0/1
Unique clicks	0/3	Unique clicks	0/1

Testing FB campaign   test campaign

Testing FB campaign   test campaign

Daily Needs

Campaign Comparison

Setting

Subscription

Under the Subscription section within the CXBOX Hub settings, the user can monitor the message quota for both CXBOX Hub and the connected Line Official Account. Furthermore, the number of contacts integrated through Sunshine Conversations is also visible.

In addition to monitoring message and contact quotas, this page enables the user to increase your CXBOX Hub quota within the current billing cycle. This can be achieved through a temporary quota increase, referred to as a top-up, or by upgrading the current plan. Users can also edit their payment information on this page, such as changing the linked credit card.
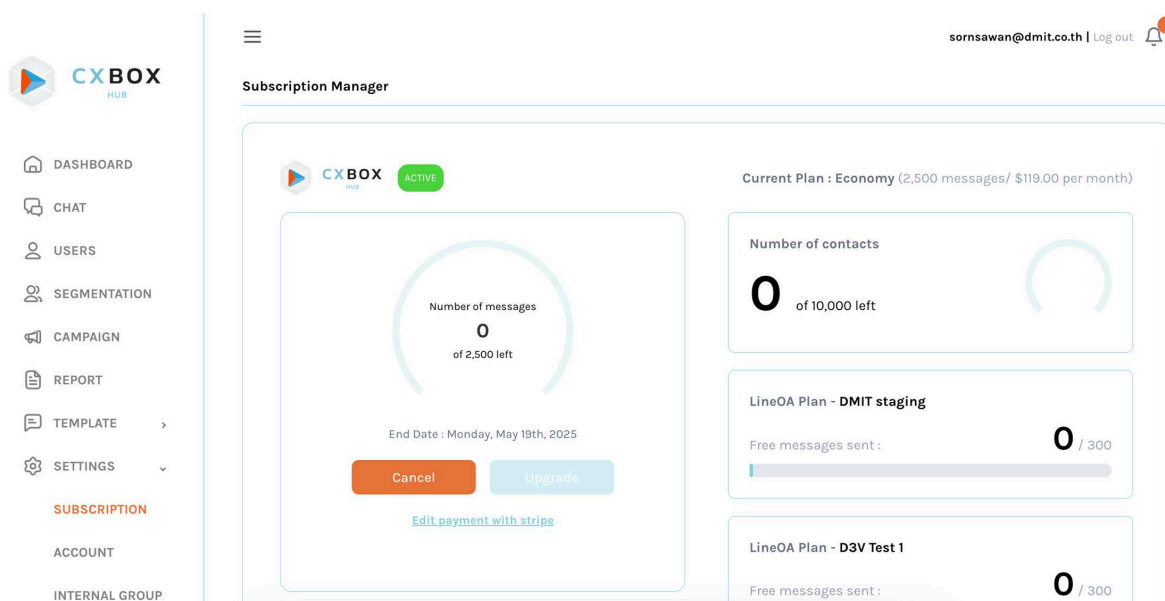
Subscription page

Account

Within the Account section, the user can review the configurations established during the onboarding process. This includes the Zendesk connection, the Sunshine Conversations integration, and any channels that have been added. Furthermore, this section allows the user to connect additional channels using native APIs.

Account page show the setup.

Additionally, the user can add team members to access CXBOX Hub by clicking the "Add Agent" button. To add a member, the user must enter the email address of the intended user and select their role. There are two available roles: ADMIN (full access) and MARKETER (restricted access to the Account page). Newly added users are required to confirm their access by clicking a link sent to their email address.

The administrator can add an agent by clicking the "Add Agent" button, filling in a new agent email, selecting a role from the drop-down, and clicking the "Add Agent" button to save

Administrators also have the ability to edit the roles of other agents by clicking the "Edit" button located next to the agent's name and selecting the desired role from the drop-down menu. Furthermore, administrators can delete agents by clicking the "Delete" button.
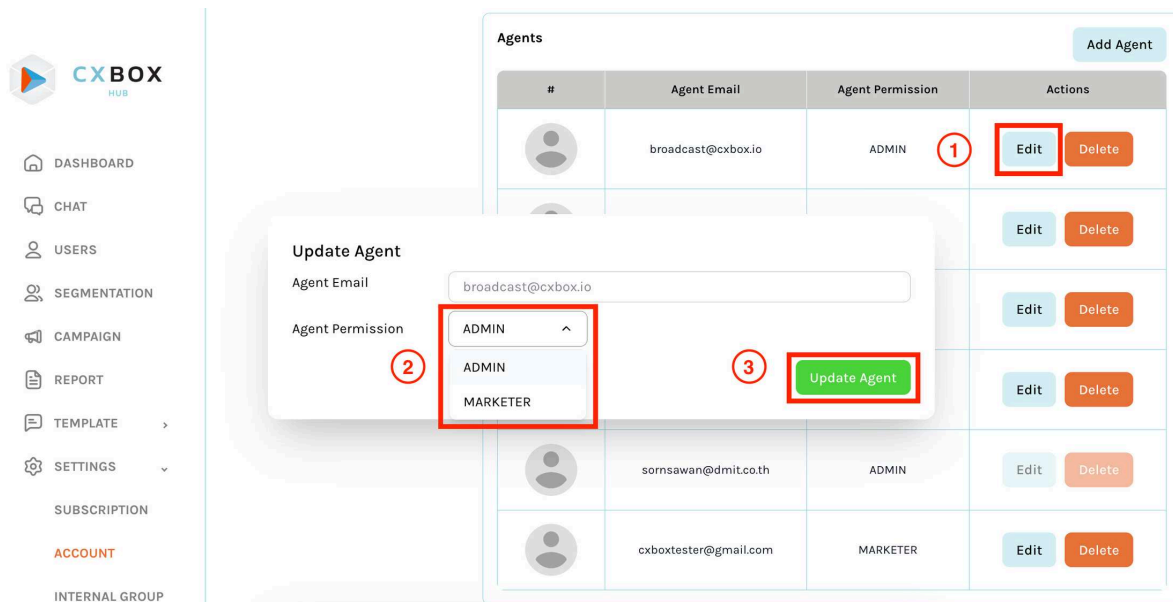
The administrator can edit an agent role by clicking the "Edit" button, selecting a new role, and clicking "Update Agent" to save
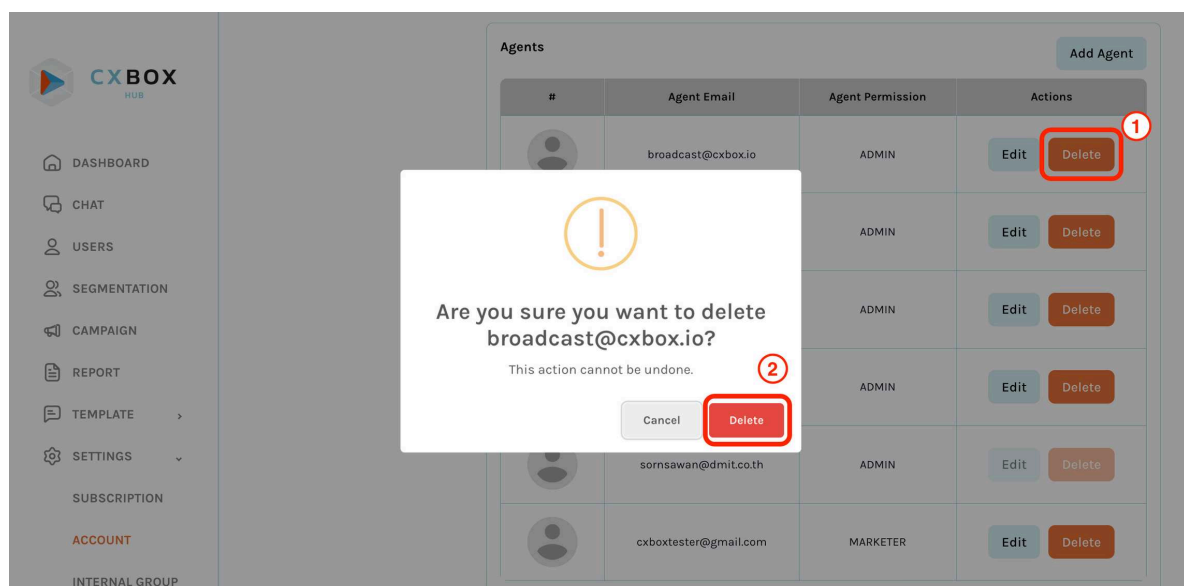
The administrator can delete an agent by clicking the "Delete" button, and clicking "Delete" again to confirm

Finally, within the Account section, the user can edit their own profile by clicking on their profile picture and selecting the desired image file.
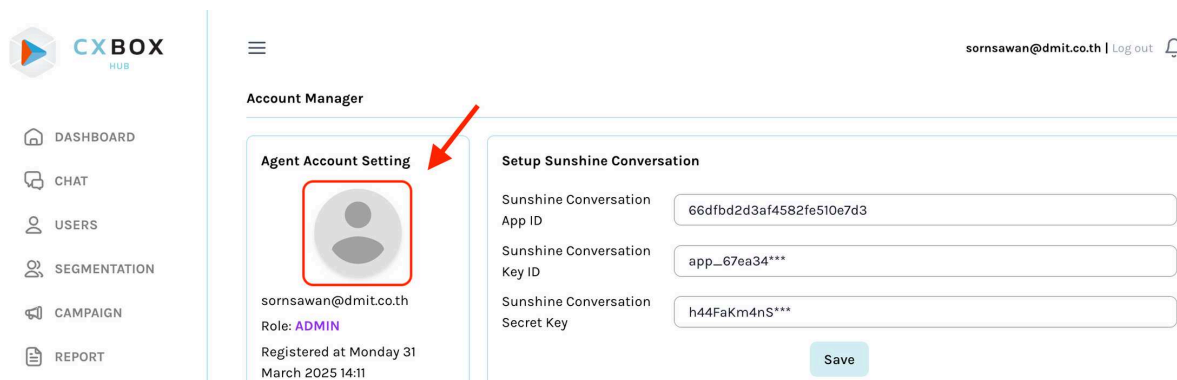
The agent can edit profile picture

Internal Group

The "Internal Group" section under Settings is similar to the Segment feature, but with a crucial distinction. Unlike segments, messages directed to internal groups will not appear on the Campaign page and will be excluded from reports. This design allows users to test campaigns effectively without impacting or being reflected in live customer communications.
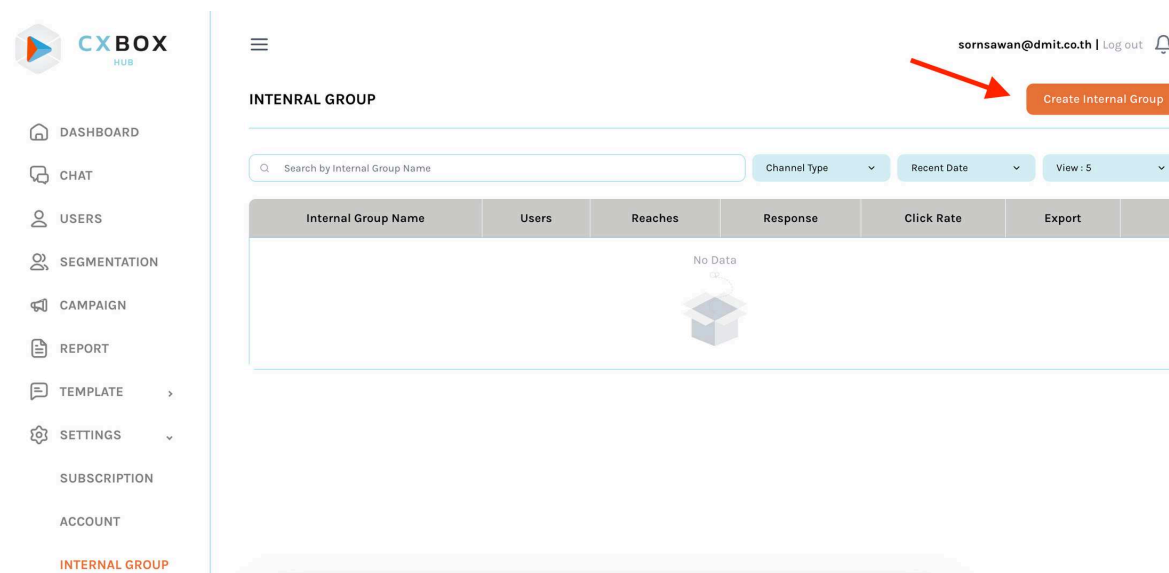
The user can create internal group for sent test campaign by clicking the "Create Internal Group" button

The user defines the internal group name, internal group type, and criteria filter, and clicks the "Create Segment" button to save

Switchboard

The Switchboard section, building upon previous mentions, provides users with the ability to define the initial destination for incoming customer messages. Within this area, users can configure whether messages are first received by platforms such as Zendesk Tickets, the Zendesk Bot, CXBOX Hub Chat, or any other integrated systems.

The example image below shows a setup where incoming messages are primarily routed to the Zendesk Ticket system. To adjust this flow, users can choose a different connected system from the provided drop-down list and save their selection.

The user can defines the initial destination for incoming customer messages

In addition to defining the initial destination, the Switchboard also allows users to switch between chat systems during a conversation using keywords. For instance, as shown in the example image below, the keyword "Transfer to Zendesk agent" has been defined. When this keyword is detected in any chat system, the conversation will be switched to a Zendesk ticket. Users can easily add or remove keywords within this section.
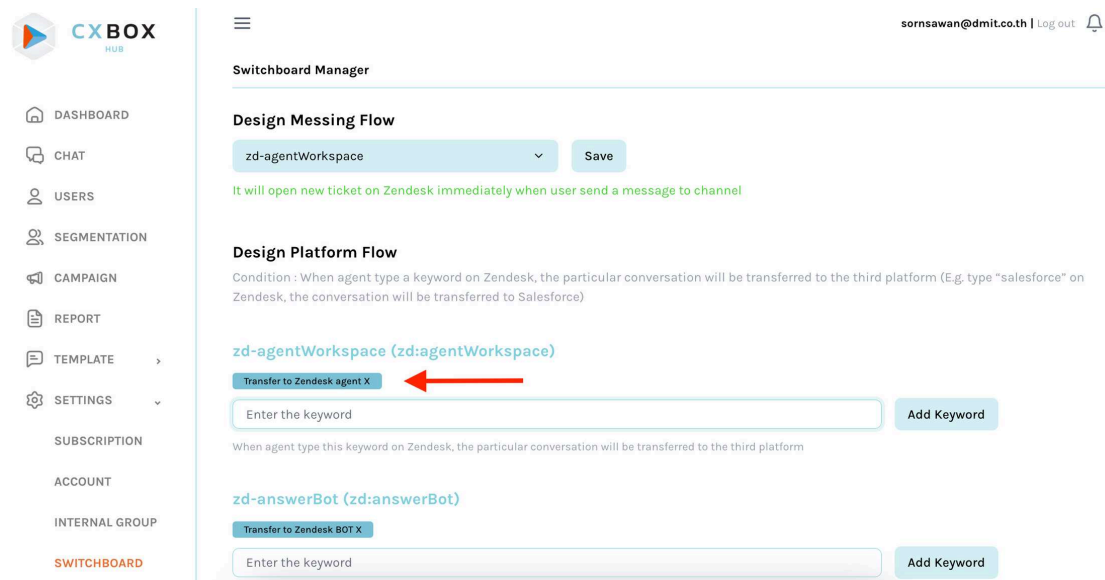
The user can defines the keyword for switch channel

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 <u>website</u> for additional resources or contact our <u>support team</u> 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.