ADMINISTRATION GUIDE

PURPOSE: This guide is intended to provide detailed instructions for Administrators of the CXM® call recording system. This document will address logging into the system and administrative duties required to program and maintain a CXM® call management system.

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The purpose of this guide is to provide detailed instructions for the Administrators of the CXM® call recording system. This document is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Co-nexus. Co-nexus assumes no responsibility or liability for any errors or inaccuracies that may appear in this book.

CUSTOMEREXPERIENCEMANAGEMENT

TABLE OF CONTENTS

GETTING STARTED

Welcome to CXM® - your digital, Web-based (intranet), call management software system. This manual introduces you to the basics of administrating the CXM® system. Access to the CXM® system is done with any Internet browser. However, to take advantage of all of the features Microsoft Internet Explorer 5.5 or higher is recommended. The use of any other browser will result in loss of application functionality. It is assumed that the Administrator and Users know how to work in the Microsoft Windows environment. Please refer to Windows documentation if there are questions about how to use menu commands, dialog boxes, scroll bars, edit boxes and so on.

This manual covers logging on and off the system, managing Users, Agents, PBX devices and other recording options.

SYSTEM LOGIN

After launching the browser program, type in the URL for CXM®. All Users and Administrators that access the CXM® system will use this same URL. For future reference please record your CXM® URL on the line below:

http://____

If there are any problems accessing the URL, please contact CXM® Support for further help.

A menu item in Favorites can be set in Internet Explorer for easier access to the URL. Also a desktop shortcut icon can be a placed on the desktop.

In the middle part of the screen is the system login area. The system requires a User name and password. The system Administrator will provide these, and they should be different from the User's network user name and password.

To Login to the CXM® System:

1. Enter User Name and Password into the appropriate *Login* fields.
2. Click *Login* or press *Enter*. All Users are taken to the *Quick Search* screen.

To Change Your Password:

1. To change your password, first select *My Login* and then *Change Password* from the options on the left side of the screen. You can also access the My Login → Change Password screen by clicking on *My Login* and *Change Password* from the CXM® menu.
2. Enter your new password into the *New Password* field.
3. Enter your new password one more time into the *Confirm Password* field.
4. Click the *OK* button to finalize your new password. A confirmation message will appear at the bottom of the screen.

To View Your Profile:

1. To view your profile, first select *My Login* and then *Profile* from the options on the left side of the screen. You can also access the My Login → Profile screen by clicking on *My Login* and *Profile* from the CXM® menu.
2. Your profile will appear on this screen, listing your user information and rights.

ADMINISTRATION

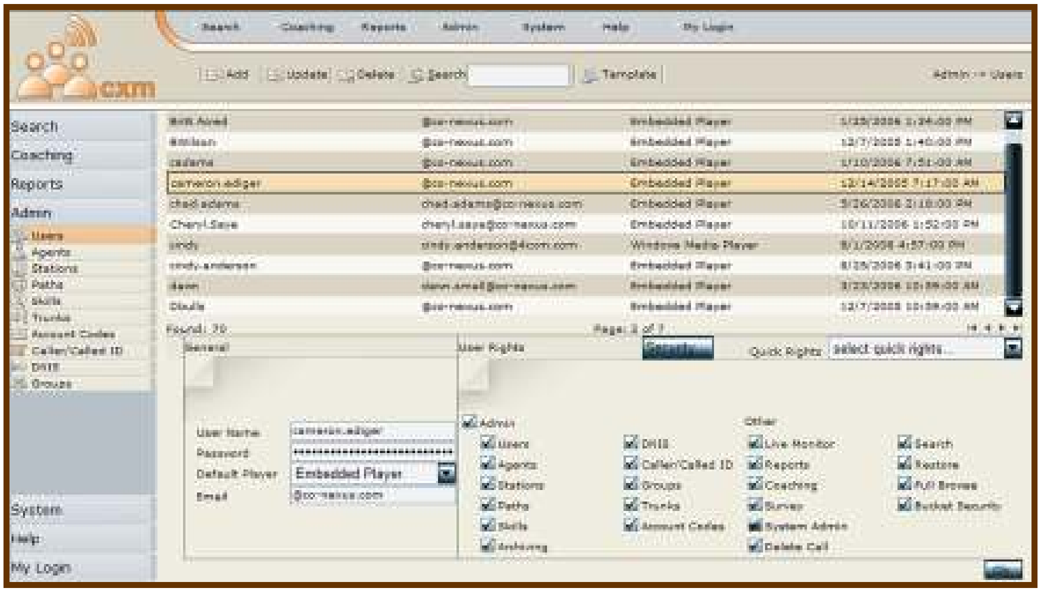
The purpose of the Administrator section is to enable the System Administrator to manage Users and devices in the CXM® System. To go to the Administrator section of CXM®, click on *Admin* in the left column or in the CXM® menu located at the top of the window. This section is only accessible to Users with System Administrator rights.

The System Administrator has the rights to access, set and update the following:

- Users
- Agents
- Stations
- VDN
- Skills
- Trunks
- Account Codes
- CCID
- DNIS
- Groups

USERS

This section displays the Users entered in the CXM® System. *The rules settings will only apply to these Users*. The administrator can search for, add, update and delete User profiles from this screen. Additionally, User rights and security access levels can be set.



To **Add** a User:

1. To add a User to the CXM® system, first select *Admin* and then *Users* from the options on the left side of the screen. You can also access the Admin->Users screen by clicking on *Admin* and *Users* from the CXM® menu.

2. Click the *Add* button located on the CXM® tool bar. This will bring up either the default User template or a created template (if one has already been established) in the *General* section located in the lower portion of the screen. (*Templates will be discussed later in this section.)*

3. In the *General* section, there are four fields that need to be completed in order to add a User.

   - *User Name:* The name used by the User to log into the CXM® system.

   - *Password:* The User's password to gain secured entry to the CXM® system.

- *Default Player:* This option allows the administrator to specify the User's media player to be used for call playback.
  - Embedded Player: This allows the User to play back calls using the CXM® media player embedded in the Search page.
  - Pop-Up Player: This allows the User to play back calls using Windows Media Player, or the User's default media player.
- *Email*: The User's email address.

4. **User Rights**

- **Rules**:
  - Users: This option gives the selected User access to the *Users* section of the CXM® System.
  - Agents: This option gives the selected User access to the *Agents* section of the CXM® System.
  - Stations: This option gives the selected User access to the *Stations* section of the CXM® System.
  - VDN: This option gives the selected User access to the *VDN* section of the CXM® System.
  - Skills: This option gives the selected User access to the *Skills* section of the CXM® System.
  - Archiving: This option gives the selected User access to the *Archiving* section of the CXM® System.
  - DNIS: This option gives the selected User access to the *DNIS* section of the CXM® System.
  - CCID: This option gives the selected User access to the *CCID* section of the CXM® System.
  - Groups: This option gives the selected User access to the *Groups* section of the CXM® System.
  - Trunks: This option gives the selected User access to the *Trunks* section of the CXM® System.
  - Account Codes: This option gives the selected User access to the *Account Codes* section of the CXM® System.
- **Other**:

- Live Monitor: This option gives the selected User access to *Live Monitoring*.
- Reports: This option gives the selected User access to the *Reports* section of the CXM® System.
- Coaching: This option gives the selected User access to the *Coaching* section of the CXM® System.
- Survey: This option gives the selected User access to the *Survey* section of the CXM® System.
- System Admin: This option gives the selected User access to all options under the *Admin* and *System* sections of the CXM® System.
- Delete Call: This option gives the selected User the right to delete calls.
- Search: This option gives the selected User access to the *Search* section of the CXM® System.
- Restore: This option gives the selected User the right to restore an archived call.
- Full Browse: This option gives the selected User the right to browse all calls.
- Bucket Security: This option allows the User to set security on public buckets.

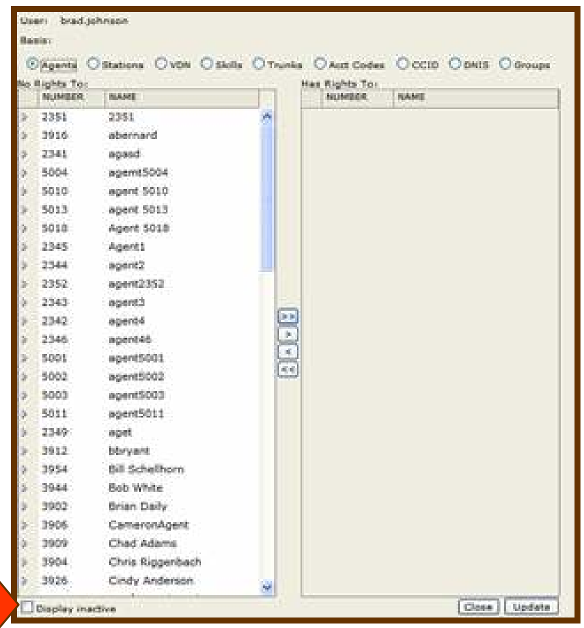
5. **Quick Rights**: The options in this drop down box provide suggested User Rights settings for the selected User.
   - Personal: This option gives the selected User rights to search calls for devices specified in his/her *Security* section.
   - Quality Coaching Admin: This option gives the selected User rights to the *Coaching* section of the CXM® System.
   - Group Administrator: This option gives the selected User rights to create, delete and modify *Groups*.
   - Administrator: This option gives the selected User rights to every option under the *Admin* section.
   - System Administrator: This option gives the selected User rights to all purchased options in the CXM® System.

6. After all User options have been entered, click the *OK* button, located in the lower right corner, to add the new User. A confirmation message will appear at the bottom of the screen.

7. Security Settings: **A User must be entered in the CXM® system before Security settings can be accessed or established.** To access the *Security* settings, first select the User from the User list and make sure the User's name appears in the *General* section.

8. *Click* the *Security* button located above the *User Rights* options. A *Security* screen will appear.

Selecting the *Display Inactive* option will reveal the objects in this basis that are no longer used in recording. Inactive objects will appear in **red**.



9. Select (by clicking the radio button) a basis by which to grant or deny security access. The CXM® Administrator may grant security access based upon any or all of the following categories:

   - *Agents:* This option allows the CXM® Administrator to assign Agents to whom the selected User has access.
   - *Stations:* This option allows the CXM® Administrator to assign Stations to which the selected User has access.
   - *VDNS:* This option allows the CXM® Administrator to assign VDNS to which the selected User has access.
   - *Skills:* This option allows the CXM® Administrator to assign Skills to which the selected User has access.

- *Trunks:* This option allows the CXM® Administrator to assign Trunks to which the selected User has access.
- *Account Codes:* This option allows the CXM® Administrator to assign Account Codes to which the selected User has access.
- *CCID:* This option allows the CXM® Administrator to assign CCIDs to which the selected User has access.
- *DNIS:* This option allows the CXM® Administrator to assign DNISs to which the selected User has access.
- *Groups:* This option allows the CXM® Administrator to assign Groups to which the selected User has access.

10. The selected User only has security access to the entries in the *Has Rights To* column. *The* selected User does not have security access to any of the entries in the *No Rights To* column.
    - To grant the User access to *ALL* of the entries in the *No Access To* column, click the >> button. All of the entries will move from the *No Access To* column to the *Has Access To* column.
    - To grant the selected User access to ONE of the entries in the *No Access To* column, click on the entry. The entry will be highlighted. Then click the > button. The entry will move from the *No Access To* column to the *Has Access To* column.
11. If there are entries in the *Has Access To* column that need to be removed, either click the << button to move *ALL* the entries to the *No Access To* column, or highlight one entry at a time and then click the < button to move the selected entry to the *No Access To* column.
12. After all additions have been made to one basis of the User's security settings, click the *Update* button located in the bottom right corner of the *Security* screen. The security settings for that basis are now updated. A confirmation message will appear at the bottom of the screen. **Any addition or update of a basis must be finalized by clicking the *Update* button before moving to another basis.**
13. To add entries based on another category, click the radio button next to the desired basis, and repeat steps 9-11.

14. After all amendments have been made to the User's Security settings, click the *Update* button located in the bottom right corner of the *Security* screen. The User's Security settings are now finalized. A confirmation message will appear at the bottom of the screen.
15. Click the *Close* button to return to the Administrator/User screen.

To Create and Access a User Template:

Creating a User Template will enable the CXM® Administrator to establish a set of default options for adding a User to the CXM® System. The User Template will appear in the lower part of the screen when the *Add* button is clicked.

1. To create a User Template, click the *Templates* button located in the CXM® tool bar.
2. Enter the name of the template in the *User Name* field and the default email address in the *Email* field. **Both of these fields must be entered in order to create a User Template.**
3. Set the template (default) options in all desired fields.
4. Click the *OK* button in the lower right corner to finalize the details of the Template. A confirmation message will appear at the bottom of the screen. The Template has now been established.
5. To access the Template after it has been created, click the *Add* button located in the CXM® tool bar. The created Template will appear in the lower portion of the screen, and can now be used to add a new User to the CXM® System.

To Update a CXM® User:

1. To view and manage details for an existing User, click the User's name in the *User Name* column or type the User's name in the *Search* field located in the tool bar. The User's profile and details will appear in the lower portion of the screen.
2. Before updating a User profile, first make sure the User's name appears in the *User Name* box.
3. Make all necessary amendments to the *General*, *User Rights*, *Security*, and *Quick Rights* options.

4. After all necessary amendments are made to the User profile, click *OK* in the bottom right corner to update the User's profile, or click the *Update* button located in the CXM® tool bar. A confirmation message will appear at the bottom of the screen.

To Delete a User:

1. To delete a User from the CXM® system, highlight the User's name in the *User Name* column by clicking on it. The User's name and profile will appear in the *General* section.
2. Click the *Delete* button in the CXM® tool bar. A confirmation dialog box will appear. Click *OK* to delete the User, or click *Cancel* to return to the Users screen.

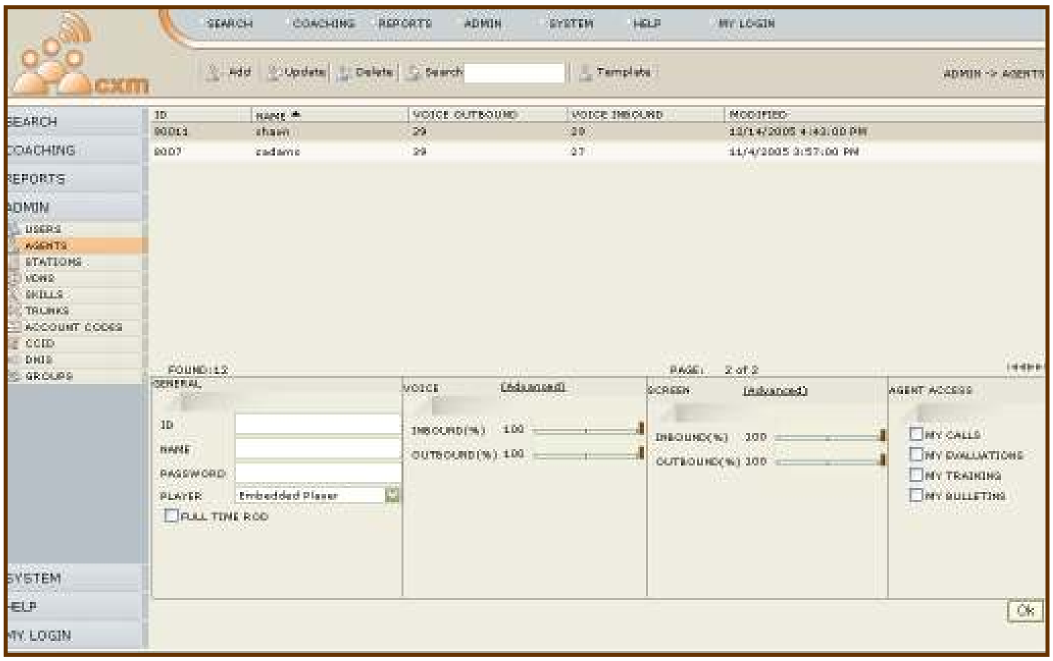
To Search for a User Name:

This option is designed to search for a User name in the list of existing User names.

1. To search for a User, type the User name into the *Search* box located in the CXM® tool bar.
2. Then click the *Search* button. *This function will only locate a User name that matches the Search command exactly.* When a matching User name is located, the User name will be highlighted, and will appear in the *User Name* box located in the *General* section. If no entry is located, check the spelling of the name typed in the *Search* box.

AGENTS

This section displays the Agents entered in the CXM® System. From this screen, Agents can be added, updated, and deleted. Additionally, an Agent's sampling rate and access level can be set. The following information is displayed for each User: Agent ID, User Name and Voice Sampling Rates (Outbound and Inbound).



To Add an Agent:

1. To add an Agent to the CXM® system, first select *Admin* and then *Agents* from the options on the left side of the screen. You can also access the Admin->Agents screen by clicking on *Admin* and *Agents* from the CXM® menu.
2. Click the *Add* button located on the CXM® tool bar. This will bring up either the default Agent template, or a created template (if one has already been established) in the *General* section located in the lower portion of the screen. (*Templates will be discussed later in this section.)*
3. In the *General* section, there are five fields that need to be completed in order to add an Agent:
   - *ID:* The Agent's PBX Agent identification number

- *Name:* The name of the Agent and the name used by the Agent to log into the CXM® Agent Portal
- *Password:* The Agent's password to gain secured entry to the CXM® Agent Portal
- *Player:* This option allows the administrator to specify the Agent's media player to be used for call playback.
    - Embedded Player: This allows the Agent to play back the voice portion of recorded calls using the CXM® media player embedded in the Search page.
    - Pop-Up Player: This allows the Agent to play back the voice portion of recorded calls using Windows Media Player, or the Agent's default media player.
    - Embedded Screen Player: This allows the Agent to play back voice and screen recordings using the CXM® media player embedded in the Search page.
    - Pop-up Screen Player: This allows the Agent to play back voice and screen recordings using the CXM® media player.
- *Full Time Record on Demand:* This option enables the Agent to record an entire call any time *Record on Demand* is initiated during the duration of a call.

4. In the *Voice* section, the CXM® Administrator must select either the *Basic* or *Advanced* sampling percentage levels. To set these percentages, click and drag the slider until the sampling rate is set at the desired percentage.

- *Basic Sampling Percentage:*
    - *Inbound Percent:* This specifies the percent of the Agent's total inbound calls that is to be recorded.
    - *Outbound Percent:* This specifies the percent of the Agent's total outbound calls that is to be recorded.
- *Advanced Sampling Percentage:* To access these options, click the *Advanced* hyperlink located at the top of the *Voice* section. To return to the *Basic* voice settings, click the *Basic* hyperlink located at the top of the *Voice* section.

  - *External Rule*: This rule governs the percentage of the Agent's total external (outside the PBX) inbound and outbound calls to be recorded.
  - *Internal Rule:* This rule governs the percentage of the Agent's total internal (within the PBX) inbound and outbound calls to be recorded.

5. In the *Screen* section, the CXM® Administrator must select either the *Basic* or *Advanced* sampling percentage levels. To set these percentages, click and drag the slider until the sampling rate is set at the desired percentage.
   - *Basic Sampling Percentage:*
     - *Inbound Percent:* This specifies the percent of the Agent's total inbound calls that is to be *Screen Captured*.
     - *Outbound Percent:* This specifies the percent of the Agent's total outbound calls that is to be *Screen Captured*.
   - *Advanced Sampling Percentage:* To access these options, click the *Advanced* hyperlink located at the top of the *Screen* section. To return to the *Basic* Screen settings, click the *Basic* hyperlink located at the top of the *Screen* section.
     - *External Rule*: This rule governs the percentage of the Agent's total external (outside the PBX) inbound and outbound calls to be *Screen Captured*.
     - *Internal Rule:* This rule governs the percentage of the Agent's total internal (within the PBX) inbound and outbound calls to be *Screen Captured*.
6. There are four options in the *Agent Access* section:
   - *My Calls:* This option allows the Agent access to listen to his/her recorded calls in the CXM® Agent Portal.
   - *My Evaluations:* This option allows the Agent access to view his/her evaluations in the CXM® Agent Portal.
   - *My Training:* This option allows the Agent access to his/her training materials in the CXM® Agent Portal.
   - *My Bulletins:* This option allows the Agent access to Group or individual bulletins located in the CXM® Agent Portal.

7. After all Agent options have been entered, click the *OK* button, located in the lower right corner, to add the new Agent. A confirmation message will appear at the bottom of the screen.

To Create and Access an Agent Template:

Creating an Agent Template will enable the CXM® Administrator to establish a set of default options for adding an Agent to the CXM® System. The Agent Template will appear in the lower part of the screen when the *Add* button is clicked.

1. To create an Agents Template, click the *Templates* button located in the CXM® tool bar.
2. Enter the desired default Agent ID number and Name in the *ID* and *Name* fields. **Both of these fields must be entered in order to create an Agent Template.**
3. Set the template (default) options in all desired fields.
4. Click the *OK* button in the lower right corner to finalize the details of the Template. A confirmation message will appear at the bottom of the screen. The Template has now been established.
5. To access the Template after it has been created, click the *Add* button located in the CXM® tool bar. The created Template will appear in the lower portion of the screen, and can now be used to add a new Agent to the CXM® System.

To Update a CXM® Agent:

1. To view and manage details for an existing Agent, click the Agent's name in the *Name* column or type the Agent's name and/or ID number in the *Search* field located in the tool bar. The Agent's profile and details will appear in the lower portion of the screen.
2. Before updating an Agent profile, first make sure the Agent's name appears in the *General* section.
3. Make all necessary amendments to the *General*, *Voice*, *Screen*, and *Agent Access* options.
4. After all necessary amendments are made to the Agent profile, click *OK* in the bottom right corner to update the Agent's profile, or click the *Update* button located in the CXM® tool

bar. A confirmation message will appear at the bottom of the screen.

To Delete an Agent:

1. To delete an Agent from the CXM® system, highlight the Agent's name in the *Name* column by clicking on it. The Agent's name and profile will appear in the *General* section.
2. Click the *Delete* button in the CXM® tool bar. A confirmation dialog box will appear. Click *OK* to delete the Agent, or click *Cancel* to return to the Agents screen.

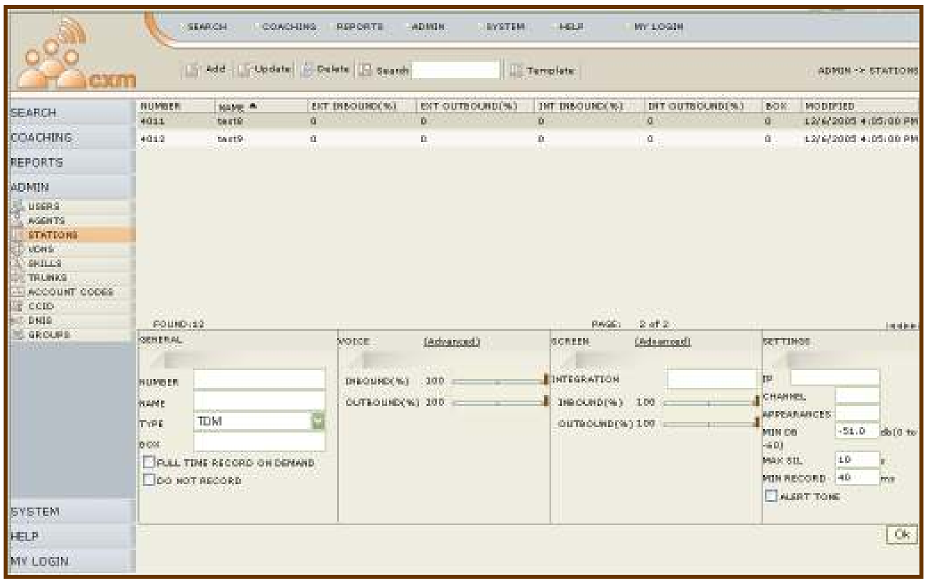
To Search for an Agent Name or ID:

This option is designed to search for an Agent by name or ID number in the list of existing Agents.

1. To search for an Agent, type the Agent's name or ID number into the *Search* box located in the CXM® tool bar.
2. Click the *Search* button. *This function will only locate an Agent name or ID number that matches the Search command exactly.* When a matching Agent name or ID number is located, the Agent's name will be highlighted, and will appear in the *Name* box located in the *General* section. If no entry is located, check the ID number or spelling of the name typed in the *Search* box.

STATIONS

This section displays the Stations entered in the CXM® System. From this screen, Stations can be added, updated, and deleted. Additionally, a Station's voice and screen sampling rate and other settings can be set. The following information is displayed for each Station: Station Number, Station Name, Sampling Rates (External/Internal and Outbound/Inbound), and Box Number.



To Add a Station:

1. To add a Station to the CXM® system, first select *Admin* and then *Stations* from the options on the left side of the screen. You can also access the Admin->Stations screen by clicking on *Admin* and *Stations* from the CXM® menu.
2. Click the *Add* button located on the CXM® tool bar. This will bring up either the default Station template, or a created template (if one has already been established) in the *General* section located in the lower portion of the screen. (*Templates will be discussed later in this section.)*
3. In the *General* section, there are six fields that need to be completed in order to add a Station:

- *Number:* The extension number of the Station
- *Name:* The name associated with the Station
- *Type:* The type of Station
    - TDM
    - IP
    - Audix or Voice Mail
    - Dialer
    - Analog
- *Box:* The number associated with the server to which the Station is connected
- *Full Time Record on Demand:* This option enables the Station to record an entire call any time *Record on Demand* is initiated during the duration of a call.
- *Do Not Record:* This option prohibits call recording at this Station.

4. In the *Voice* section, the CXM® Administrator must select either the *Basic* or *Advanced* sampling percentage levels. To set these percentages, click and drag the slider until the sampling rate is set at the desired percentage.

- *Basic Sampling Percentage:*
    - *Inbound Percent:* This specifies the percent of the Station's total inbound calls that is to be recorded.
    - *Outbound Percent:* This specifies the percent of the Station's total outbound calls that is to be recorded.
- *Advanced Sampling Percentage:* To access these options, click the *Advanced* hyperlink located at the top of the *Voice* section. To return to the *Basic* voice settings, click the *Basic* hyperlink located at the top of the *Voice* section.
    - *External Rule*: This rule governs the percentage of the Station's total external (outside the PBX) inbound and outbound calls to be recorded.
    - *Internal Rule:* This rule governs the percentage of the Station's total internal (within the PBX) inbound and outbound calls to be recorded.

5. In the *Screen* section, there is a box in which to type the *Integration* of the new system. The integration is the host name entered in the Proxy Host software on the user's workstation.
6. In the *Screen* section, the CXM® Administrator must select either the *Basic* or *Advanced* sampling percentage levels. To set these percentages, click and drag the slider until the sampling rate is set at the desired percentage.
   - *Basic Sampling Percentage:*
     - *Inbound Percent:* This specifies the percent of the Station's total inbound calls that is to be *Screen Captured*.
     - *Outbound Percent:* This specifies the percent of the Station's total outbound calls that is to be *Screen Captured*.
   - *Advanced Sampling Percentage:* To access these options, click the *Advanced* hyperlink located at the top of the *Screen* section. To return to the *Basic* Screen settings, click the *Basic* hyperlink located at the top of the *Screen* section.
     - *External Rule*: This rule governs the percentage of the Station's total external (outside the PBX) inbound and outbound calls to be *Screen Captured*.
     - *Internal Rule:* This rule governs the percentage of the Station's total internal (within the PBX) inbound and outbound calls to be *Screen Captured*.
7. There are seven fields to complete in the *Settings* section:
   - *IP:* Either the MAC address or the IP address of the IP Station
   - *Channel:* The channel on the voice board where the Station is to be recorded
   - *Appearances:* Line appearance mapping for DSR CXM® systems
   - *Min DB:* Minimum decibel level denoting activity for analog recording at this Station
   - *Max SIL*: Number of seconds of silence needed to determine the end of a call for analog recording at this Station

- *Min Record:* Number of seconds of sustained activity to engage recording for analog recording at this Station
- *Alert Tone:* Enables or disables audible Alert Tone during the call for analog recording at this Station

8. After all Station options have been entered, click the *OK* button, located in the lower right corner, to add the new Station. A confirmation message will appear at the bottom of the screen.

To Create and Access a Station Template:

Creating a Station Template will enable the CXM® Administrator to establish a set of default options for adding a Station to the CXM® System. The Station Template will appear in the lower part of the screen when the *Add* button is clicked.

1. To create a Station Template, click the *Templates* button located in the CXM® tool bar.
2. Set the template (default) options in all desired fields.
3. Click the *OK* button in the lower right corner to finalize the details of the Template. A confirmation message will appear at the bottom of the screen. The Template has now been established.
4. To access the Template after it has been created, click the *Add* button located in the CXM® tool bar. The created Template will appear in the lower portion of the screen, and can now be used to add a new Station to the CXM® System.

To Update a Station:

1. To view and manage details for an existing Station, click the Station name or number in the *Stations* list or type the Station name or number in the *Search* field located in the tool bar. The Station's profile and details will appear in the lower portion of the screen.
2. Before updating a Station profile, first make sure the Station name and number appear in the *General* section.
3. Make all necessary amendments to the *General*, *Voice*, *Screen*, and *Settings* options.

4. After all necessary amendments are made to the Station profile, click *OK* in the bottom right corner to update the Station profile, or click the *Update* button located in the CXM® tool bar. A confirmation message will appear at the bottom of the screen.

To Delete a Station:

1. To delete a Station from the CXM® system, highlight the Station name or number in the *Name* or *Number* column by clicking on it. The Station name, number and profile will appear in the *General* section.
2. Click the *Delete* button in the CXM® tool bar. A confirmation dialog box will appear. Click *OK* to delete the Station, or click *Cancel* to return to the Stations screen.

To Search for a Station:

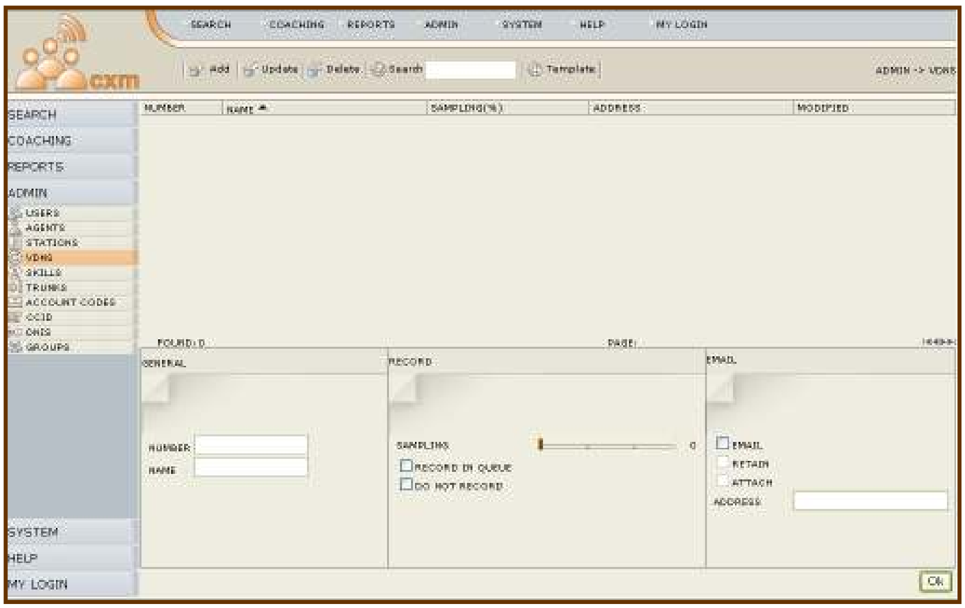
This option is designed to search for a Station by name or number in the list of existing Stations.

1. To search for a Station, type the Station name or number into the *Search* box located in the CXM® tool bar.
2. Click the *Search* button. *This function will only locate a Station name or number that matches the Search command exactly.* When a matching Station name or number is located, the Station details will be highlighted, and the Station profile will appear in the *General* section. If no entry is located, check the Station name and number typed in the *Search* box.

VDN

***NOTE**: In other phone systems, this may be called "Paths" or "Pilots."*

This section displays the VDNs entered in the CXM® System. The term VDN refers to *Vector Directory Number*. From this screen, VDNs can be added, updated, and deleted. Additionally, a VDN's sampling rate, recording options and email information can be set. The following information is displayed for each VDN: Number, Name, Sampling Rates, and email addresses.



To Add a VDN:

1. To add a VDN to the CXM® system, first select Admin and then VDN from the options on the left side of the screen. You can also access the Admin->VDNs screen by clicking on *Admin* and *VDNs* from the CXM® menu.
2. Click the *Add* button located on the CXM® tool bar. This will bring up either the default Station template or a created template (if one has already been established) in the *General* section located in the lower portion of the screen. (*Templates will be discussed later in this section.)*
3. In the *General* section, there are two fields that need to be completed in order to add a Station:

- *Number:* The extension number of the VDN
- *Name:* The name associated with the VDN

4. In the *Record* section, the sampling percentage must be established. The VDN Sampling Rate refers to the percent of the total calls routed through the given VDN that is to be recorded. To set this percentage, click and drag the slider until the sampling rate is set at the desired percentage.
5. There are two additional options in the *Record* section:
   - *Record in Queue:* This option enables call recording at the time the call reaches this VDN.
   - *Do Not Record:* This option prohibits call recording at this VDN.
6. The *Email* section allows the administrator to set all recorded calls that pass through this VDN to be emailed to a specific address. There are three options in the *Email section:*
   - *Email:* This option allows the CXM® Administrator to email a description of all calls through this VDN to the given email address.
   - *Retain:* Select this option to keep the call on the CXM® system after it is emailed. Not selecting this option will result in the deletion of the call from the CXM® system.
   - *Attach:* This option allows the CXM® Administrator to attach the call's wave file to the email.
7. The *Address* field in the *Email* section allows the CXM® Administrator to specify to which email address the recorded calls that pass through this VDN will be sent.
8. After all VDN options have been entered, click the *OK* button, located in the lower right corner, to add the new VDN. A confirmation message will appear at the bottom of the screen.

To Create and Access a VDN Template:

Creating a VDN Template will enable the CXM® Administrator to establish a set of default options for adding a VDN to the CXM® System. The VDN Template will appear in the lower part of the screen when the *Add* button is clicked.

1. To create a VDN Template, click the *Templates* button located in the CXM® tool bar.

2. Enter the desired default VDN number and name in the *Number* and *Name* fields. **Both of these fields must be entered in order to create a VDN Template.**
3. Set the template (default) options in all desired fields.
4. Click the *OK* button in the lower right corner to finalize the details of the Template. A confirmation message will appear at the bottom of the screen. The Template has now been established.
5. To access the Template after it has been created, click the *Add* button located in the CXM® tool bar. The created Template will appear in the lower portion of the screen, and can now be used to add a new Station to the CXM® System.

To Update a VDN:

1. To view and manage details for an existing VDN, click the VDN name or number in the *Name* or *Number* column, or type the VDN name or number in the *Search* field located in the tool bar. The VDN's details will appear in the lower portion of the screen.
2. Before updating a VDN profile, first make sure the VDN name and number appear in the *General* section.
3. Make all necessary amendments to the *General*, *Record*, and *Email* options.
4. After all necessary amendments are made to the VDN profile, click *OK* in the bottom right corner to update the VDN profile, or click the *Update* button located in the CXM® tool bar. A confirmation message will appear at the bottom of the screen.

To Delete a VDN:

1. To delete a VDN from the CXM® system, highlight the VDN name or number in the *Name* or *Number* column by clicking on it. The VDN name and number will appear in the *General* section.
2. Click the *Delete* button in the CXM® tool bar. A confirmation dialog box will appear. Click *OK* to delete the VDN, or click *Cancel* to return to the *VDN* screen.

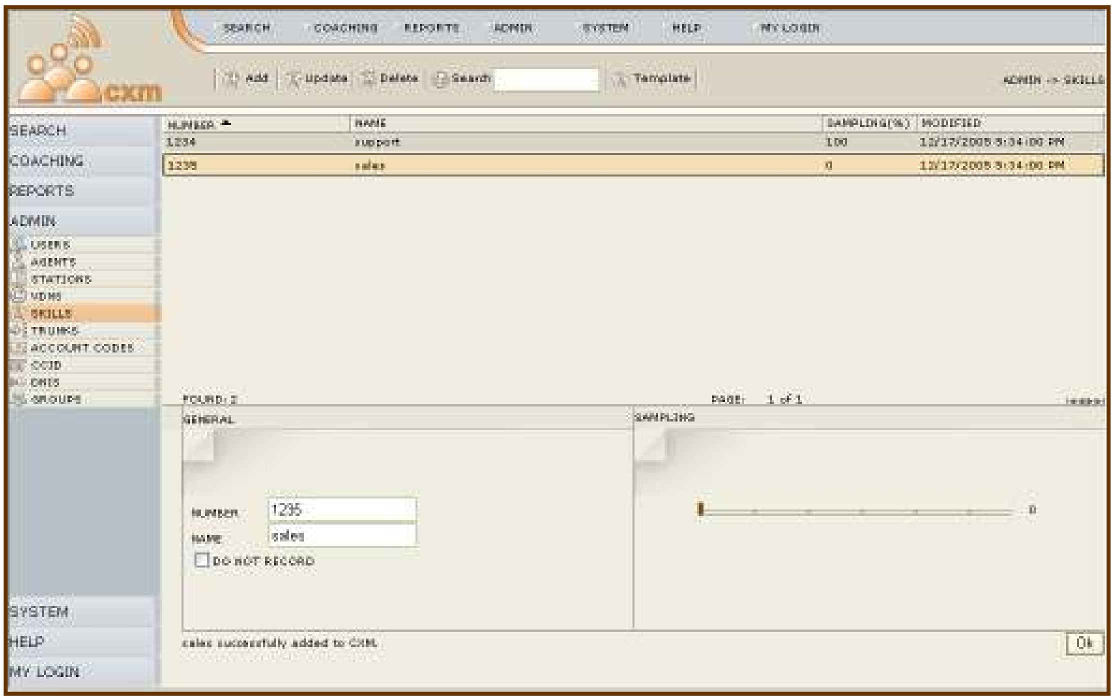
To Search for VDN by Name or Number:

This option is designed to search for a VDN by name or number in the list of existing VDNs.

1. To search for a VDN, type the VDN name or number into the *Search* box located in the CXM® tool bar.
2. Click the *Search* button. *This function will only locate a VDN name or number that matches the Search command exactly*. When a matching VDN is located, the VDN details will be highlighted, and the VDN profile will appear in the *General* section. If no entry is located, check the VDN name and number typed in the *Search* box.

SKILLS

This section displays the Skills entered in the CXM® System. The term *Skill* refers to Automatic Call Distribution (ACD) Groups. From this screen, Skills can be added, updated, and deleted. Additionally, a Skill's sampling rate can be set.



To Add a Skill:

1. To add a Skill to the CXM® system, first select *Admin* and then *Skills* from the options on the left side of the screen. You can also access the Admin->Skills screen by clicking on *Admin* and *Skills* from the CXM® menu.
2. Click the *Add* button located on the CXM® tool bar. This will bring up either the default Skills template, or a created template (if one has already been established) in the *General* section located in the lower portion of the screen. (*Templates will be discussed later in this section.)*
3. In the *General* section, there are three fields that need to be completed in order to add a Skill:
   - *Number:* Extension number of the Skill group

- *Name:* The name associated with the Skill group
- *Do Not Record:* This option prohibits call recording at this Skill group.

4. In the *Sampling* section, the sampling percentage must be established. The Sampling Rate for a Skill is the percent of the total calls routed through the given Skill group that is to be recorded. To set this percentage, click and drag the slider until the sampling rate is set at the desired percentage.
5. After all Skills options have been entered, click the *OK* button, located in the lower right corner, to add the new Skill. A confirmation message will appear at the bottom of the screen.

To Create and Access a Skills Template:

Creating a Skills Template will enable the CXM® Administrator to establish a set of default options for adding a Skill Group to the CXM® System. The Skills Template will appear in the lower part of the screen when the *Add* button is clicked.

1. To create a Skills Template, click the *Templates* button located in the CXM® tool bar.
2. Enter the desired default Skill Group number and name in the *Number* and *Name* fields. **Both of these fields must be entered in order to create a Skills Template.**
3. Set the template (default) options in all desired fields.
4. Click the *OK* button in the lower right corner to finalize the details of the Template. A confirmation message will appear at the bottom of the screen. The Template has now been established.
5. To access the Template after it has been created, click the *Add* button located in the CXM® tool bar. The created Template will appear in the lower portion of the screen, and can now be used to add a new Skill Group to the CXM® System.

To Update a Skill:

1. To view and manage details for an existing Skill, click the Skill name or number in the *Name* or *Number* column, or type the

Skill name or number in the *Search* field located in the tool bar. The Skill's details will appear in the lower portion of the screen.

2. Before updating a Skill profile, first make sure the Skill name and number appear in the *General* section.
3. Make all necessary amendments to the General and Sampling options.
4. After all necessary amendments are made to the Skills profile, click *OK* in the bottom right corner to update the Skills profile, or click the *Update* button located in the CXM® tool bar. A confirmation message will appear at the bottom of the screen.

To Delete a Skill:

1. To delete a Skill from the CXM® system, highlight the Skill name or number in the *Name* or *Number* column by clicking on it. The Skill name and number will appear in the *General* section.
2. Click the *Delete* button in the CXM® tool bar. A confirmation dialog box will appear. Click *OK* to delete the Skill, or click *Cancel* to return to the Skills screen.

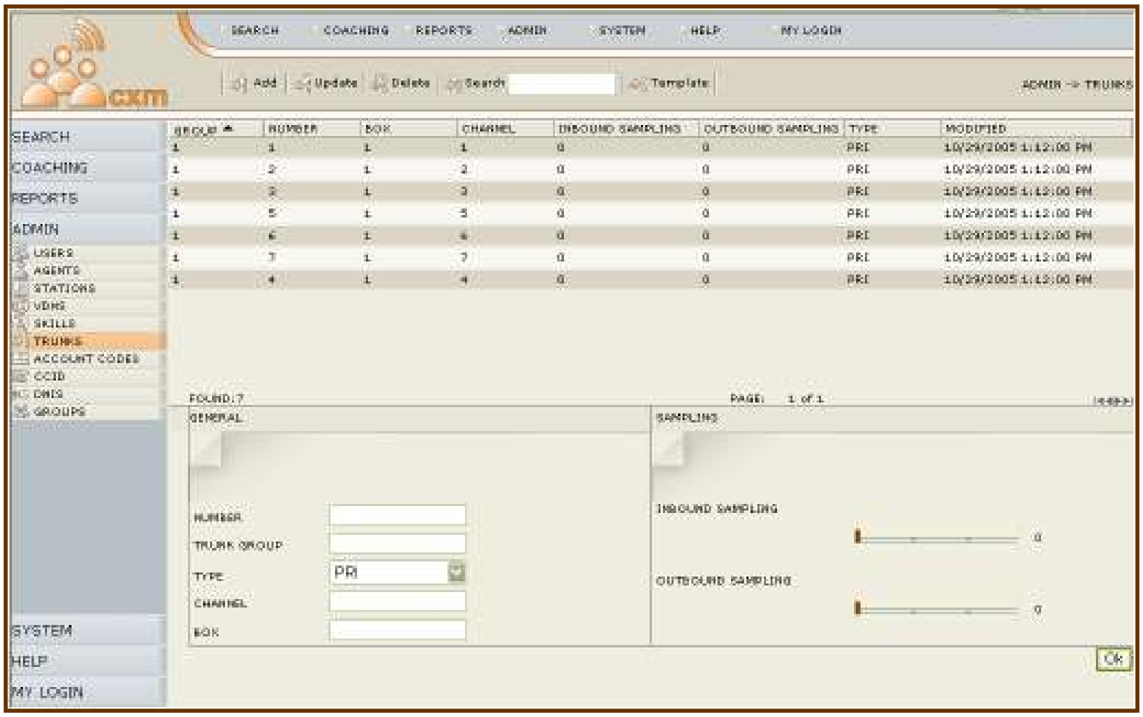
To Search for a Skill by Name or Number:

This option is designed to search for a Skill by name or number in the list of existing Skills.

1. To search for a Skill, type the Skill name or number into the *Search* box located in the CXM® tool bar.
2. Click the *Search* button. *This function will only locate a Skill name or number that matches the Search command exactly.* When a matching Skill is located, the Skill details will be highlighted, and the Skill profile will appear in the *General* section. If no entry is located, check the Skill name and number typed in the *Search* box.

TRUNKS

This section displays the Trunks entered in the CXM® System. The term *Trunk* refers a phone line between the phone company's central office and the local PBX. From this screen, Trunks can be added, updated, and deleted. Additionally, a Trunk's sampling rate (inbound and outbound) can be set. The following information is displayed for each Trunk: Group Number, Trunk Number, Box Number, Channel, Sampling Percents (inbound and outbound), and Trunk Type.



To Add a Trunk:

1. To add a Trunk to the CXM® system, first select *Admin* and then *Trunks* from the options on the left side of the screen. You can also access the Admin->Trunks screen by clicking on *Admin* and *Trunks* from the CXM® menu.
2. Click the *Add* button located on the CXM® tool bar. This will bring up either the default Trunks template or a created template (if one has already been established) in the *General* section located in the lower portion of the screen. (*Templates will be discussed later in this section.)*

3. In the *General* section, there are five fields that need to be completed in order to add a Trunk:
    - *Number:* The Trunk number
    - *Trunk Group:* The Trunk Group number
    - *Type:* The type of Trunk
        - PRI: 23 voice channels
        - T1: 24 voice channels
        - Analog
    - *Channel:* The channel on the voice board where the Trunk is to be recorded
    - *Box:* The number associated with the server to which the Trunk is connected
4. In the *Sampling* section, there are two percentage levels that must be established. To set these percentages, click and drag the slider until the sampling rate is set at the desired percentage.
    - *Inbound Percent:* This specifies the percent of the Trunk's total inbound calls that is to be recorded.
    - *Outbound Percent:* This specifies the percent of the Trunk's total outbound calls that is to be recorded.
5. After all Trunks options have been entered, click the *OK* button, located in the lower right corner, to add the new Trunk. A confirmation message will appear at the bottom of the screen.

To Create and Access a Trunks Template:

Creating a Trunks Template will enable the CXM® Administrator to establish a set of default options for adding a Trunk to the CXM® System. The Trunks Template will appear in the lower part of the screen when the *Add* button is clicked.

1. To create a Trunks Template, click the *Templates* button located in the CXM® tool bar.
2. Set the template (default) options in all desired fields.
3. Click the *OK* button in the lower right corner to finalize the details of the Template. A confirmation message will appear at

the bottom of the screen. The Template has now been established.

4. To access the Template after it has been created, click the *Add* button located in the CXM® tool bar. The created Template will appear in the lower portion of the screen, and can now be used to add a new Trunk to the CXM® System.

To Update a Trunk:

1. To view and manage details for an existing Trunk, click the Trunk number in the *Number* column, or type the Trunk number in the *Search* field located in the tool bar. The Trunk's details will appear in the lower portion of the screen.
2. Before updating a Trunk profile, first make sure the Trunk number appears in the *General* section.
3. Make all necessary amendments to the *General* and *Sampling* options.
4. After all necessary amendments are made to the Trunk profile, click *OK* in the bottom right corner to update the Trunk profile, or click the *Update* button located in the CXM® tool bar. A confirmation message will appear at the bottom of the screen.

To Delete a Trunk:

1. To delete a Trunk from the CXM® system, highlight the Trunk number in the *Number* column by clicking on it. The Trunk number will appear in the *General* section.
2. Click the *Delete* button in the CXM® tool bar. A confirmation dialog box will appear. Click *OK* to delete the Trunk, or click *Cancel* to return to the Trunks screen.

To Search for a Trunk by Number:

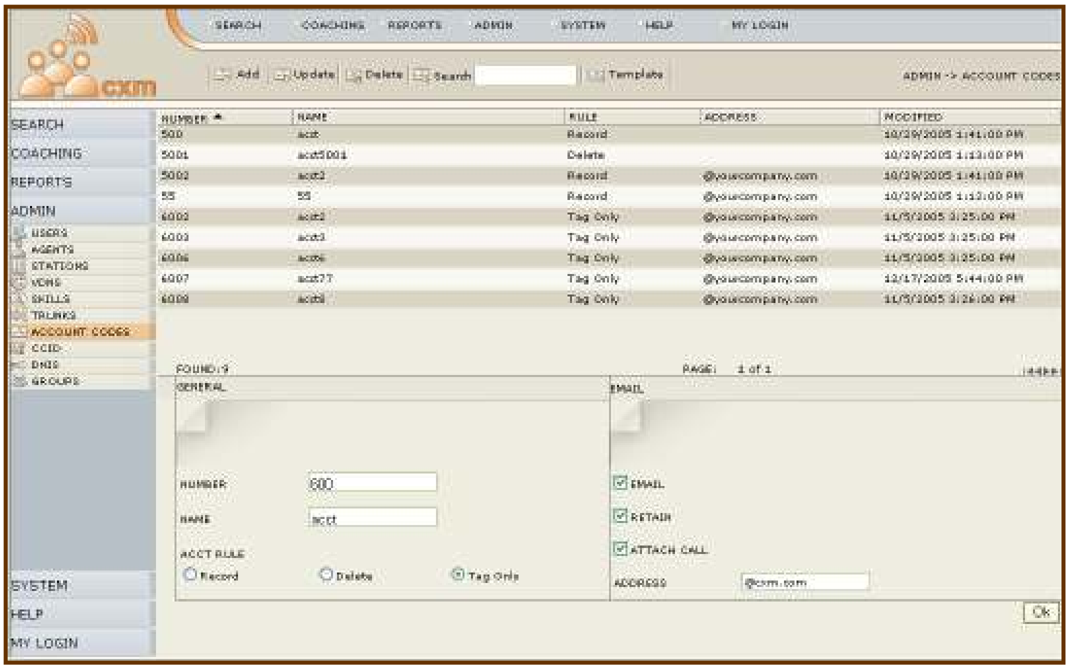
This option is designed to search for a Trunk by number in the list of existing Trunks.

1. To search for a Trunk, type the Trunk number into the *Search* box located in the CXM® tool bar.
2. Click the *Search* button. *This function will only locate a Trunk number that matches the Search command exactly.* When a

matching Trunk is located, the Trunk details will be highlighted, and the Trunk profile will appear in the *General* section. If no entry is located, check the Trunk number typed in the *Search* box.

ACCOUNT CODES

This section allows the CXM® Administrator to assign call recording based on the account code entered on a call. From this screen, Account Codes can be added, updated, and deleted. Additionally, the CXM® Administrator can set up individual recording rules and email instructions for a call with a given account code. The following information is displayed for each account code: Account Code Number, Name, Rule, and Email Address.



To Add an Account Code:

1. To add an Account Code to the CXM® system, first select *Admin* and then *Account Codes* from the options on the left side of the screen. You can also access the Admin->Account Codes screen by clicking on *Admin* and *Account Codes* from the CXM® menu.
2. Click the *Add* button located on the CXM® tool bar. This will bring up either the default Account Codes template or a created template (if one has already been established) in the *General* section located in the lower portion of the screen. (*Templates will be discussed later in this section.)*

3. In the *General* section, there are two fields and three options that need to be completed in order to add an Account Code:
    - *Number:* The Account Code
    - *Name:* The name associated with the Account Code
    - *Account Rules:* These options determine how the call's Account Code affects the recording of the call.
        - Record: records all calls with the given Account Code
        - Delete: deletes all calls with the given Account Code
        - Tag Only: applies the Account Code to the call record
4. The *Email* section allows the administrator to set all calls with a given Account Code to be emailed to a specific address. There are three options in the *Email section:*
    - *Email:* This option allows the CXM® Administrator to email a description of all calls with the selected Account Code to the given email address.
    - *Retain:* Select this option to keep the call on the CXM® system after it is emailed. Not selecting this option will result in the deletion of the call from the CXM® system.
    - *Attach:* This option allows the CXM® Administrator to attach the call's wave file to the email.
5. The *Address* field allows the CXM® Administrator to specify to which email address the calls with the given Account Code will be sent.
6. After all Account Codes options have been entered, click the *OK* button, located in the lower right corner, to add the new Account Code. A confirmation message will appear at the bottom of the screen.

To Create and Access an Account Codes Template:

Creating an Account Codes Template will enable the CXM® Administrator to establish a set of default options for adding an Account Code to the CXM® System. The Account Codes Template will appear in the lower part of the screen when the *Add* button is clicked.

1. To create an Account Codes Template, click the *Templates* button located in the CXM® tool bar.

2. Enter the desired default Account Code Number and Name in the *Number* and *Name* fields. **Both of these fields must be entered in order to create an Account Codes Template.**
3. Set the template (default) options in all desired fields.
4. Click the *OK* button in the lower right corner to finalize the details of the Template. A confirmation message will appear at the bottom of the screen. The Template has now been established.
5. To access the Template after it has been created, click the *Add* button located in the CXM® tool bar. The created Template will appear in the lower portion of the screen, and can now be used to add a new Account Code to the CXM® System.

To Update an Account Code:

1. To view and manage details for an existing Account Code, click the Account Code number in the *Number* column, or type the Account Code number in the *Search* field located in the tool bar. The Account Code's details will appear in the lower portion of the screen.
2. Before updating an Account Code profile, first make sure the Account Code number appears in the *General section*.
3. Make all necessary amendments to the *General* and *Email* options.
4. After all necessary amendments are made to the Account Code profile, click *OK* in the bottom right corner to update the Account Code profile, or click the *Update* button located in the CXM® tool bar. A confirmation message will appear at the bottom of the screen.

To Delete an Account Code:

1. To delete an Account Code from the CXM® system, highlight the Account Code number in the *Number* column by clicking on it. The Account Code number will appear in the *General* section.
2. Click the *Delete* button in the CXM® tool bar. A confirmation dialog box will appear. Click *OK* to delete the Account Code, or click *Cancel* to return to the Account Codes screen.

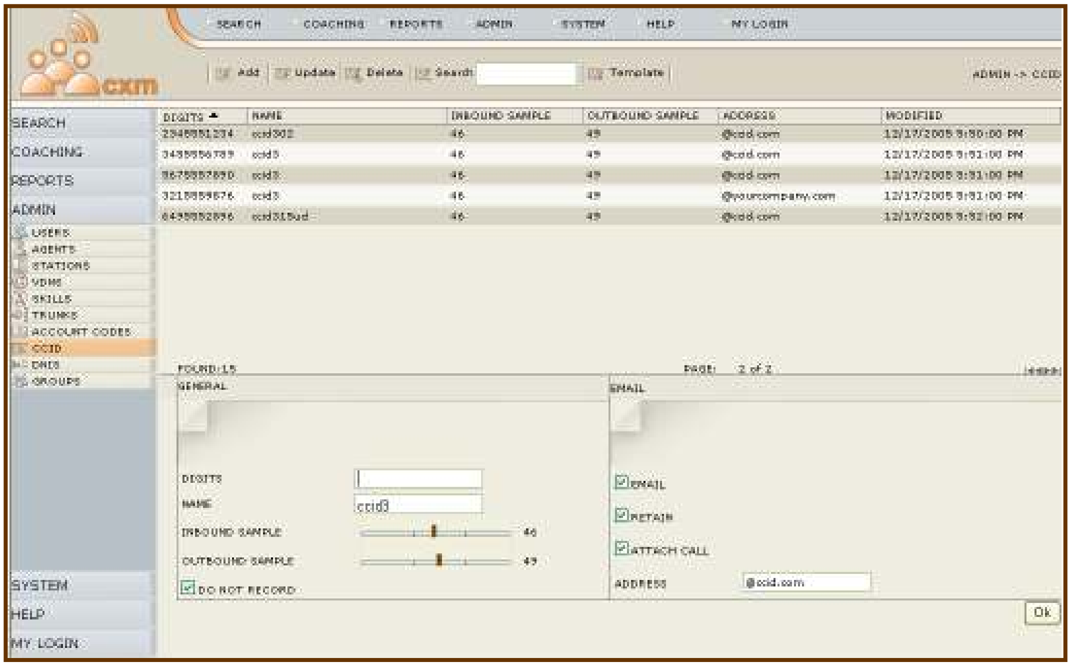
To Search for an Account Code:

This option is designed to search for an Account Code by number in the list of existing Account Codes.

1. To search for an Account Code, type the Account Code number into the *Search* box located in the CXM® tool bar.
2. Click the *Search* button. *This function will only locate an Account Code that matches the Search command exactly*. When a matching Account Code is located, the Account Code details will be highlighted, and the Account Code profile will appear in the *General* section. If no entry is located, check the Account Code number typed in the *Search* box.

CCID-CALLER/CALLED ID

This section allows the CXM® Administrator to set call recording based on the call's CCID. The term *CCID* refers to Caller/Called Identification. From this screen, CCIDs can be added, updated, and deleted. Additionally, the CXM® Administrator can set up individual recording rules and email instructions for a call with a given CCID. The following information is displayed for each account code: CCID Digits, CCID Name, Sampling Rates (inbound and outbound), and Email Address.



To Add a CCID:

1. To add a CCID to the CXM® system, first select *Admin* and then *CCID* from the options on the left side of the screen. You can also access the Admin->CCID screen by clicking on *Admin* and *CCID* from the CXM® menu.

2. Click the *Add* button located on the CXM® tool bar. This will bring up either the default CCID template or a created template (if one has already been established) in the *General* section located in the lower portion of the screen. (*Templates will be discussed later in this section.)*

3. In the *General* section, there are two fields and three options that need to be completed in order to add a CCID:
   - *Digits:* The Caller/Called Identification number
   - *Name:* The name associated with the Caller/Called Identification
   - *Sampling Rates: To set these percentages, click and drag the slider until the sampling rate is set at the desired percentage.*
     - *Inbound Percent:* This specifies the percent of the Caller ID's total inbound calls that is to be recorded.
     - *Outbound Percent:* This specifies the percent of the Called ID's total outbound calls that is to be recorded.
   - *Do Not Record:* This option prohibits call recording of calls with the selected CCID.
4. The *Email* section allows the administrator to set all calls with a given CCID to be emailed to a specific address. There are three options in the *Email section:*
   - *Email:* This option allows the CXM® Administrator to email a description of all calls with the selected CCID to the given email address.
   - *Retain:* Select this option to keep the call on the CXM® system after it is emailed. Not selecting this option will result in the deletion of the call from the CXM® system.
   - *Attach:* This option allows the CXM® Administrator to attach the call's wave file to the email.
5. The *Address* field allows the CXM® Administrator to specify to which email address the calls with the given CCID will be sent.
6. After all CCID options have been entered, click the *OK* button, located in the lower right corner, to add the new CCID. A confirmation message will appear at the bottom of the screen.

To Create and Access a CCID Template:

Creating a CCID Template will enable the CXM® Administrator to establish a set of default options for adding a CCID to the CXM® System. The CCID Template will appear in the lower part of the screen when the *Add* button is clicked.

1. To create a CCID Template, click the *Templates* button located in the CXM® tool bar.
2. Enter the desired default CCID Digits and Name in the *Digits* and *Name* fields. **Both of these fields must be entered in order to create a CCID Template.**
3. Set the template (default) options in all desired fields.
4. Click the *OK* button in the lower right corner to finalize the details of the Template. A confirmation message will appear at the bottom of the screen. The Template has now been established.
5. To access the Template after it has been created, click the *Add* button located in the CXM® tool bar. The created Template will appear in the lower portion of the screen, and can now be used to add a new CCID to the CXM® System.

To Update a CCID:

1. To view and manage details for an existing CCID, click the CCID digits or name in the list of CCIDs, or type the CCID digits or name in the *Search* field located in the tool bar. The CCID's details will appear in the lower portion of the screen.
2. Before updating a CCID profile, first make sure the CCID appears in the *General section*.
3. Make all necessary amendments to the *General* and *Email* options.
4. After all necessary amendments are made to the CCID profile, click *OK* in the bottom right corner to update the CCID profile, or click the *Update* button located in the CXM® tool bar. A confirmation message will appear at the bottom of the screen.

To Delete a CCID:

1. To delete a CCID from the CXM® system, highlight the CCID digits or name in the list of CCIDs by clicking on it. The CCID will appear in the *General* section.
2. Click the *Delete* button in the CXM® tool bar. A confirmation dialog box will appear. Click *OK* to delete the CCID, or click *Cancel* to return to the CCID screen.

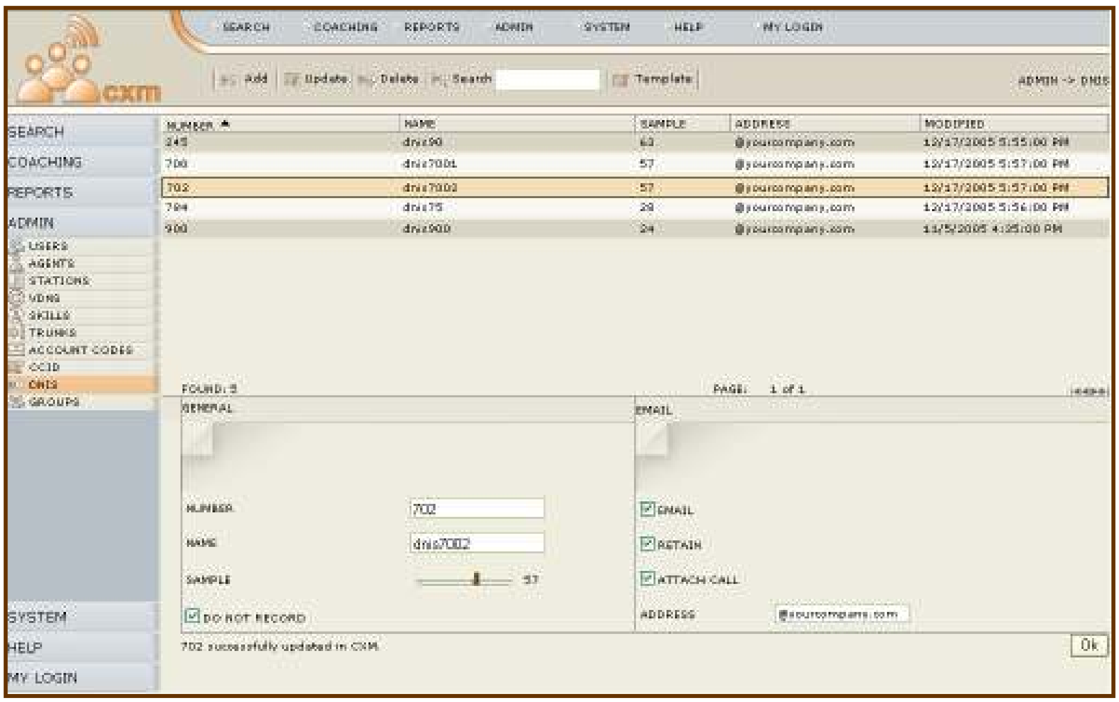
To Search for a CCID:

This option is designed to search for a CCID by digits or name in the list of existing CCIDs.

1. To search for a CCID, type the CCID digits or name into the *Search* box located in the CXM® tool bar.
2. Click the *Search* button. *This function will only locate a CCID that matches the Search command exactly.* When a matching CCID is located, the CCID details will be highlighted, and the CCID profile will appear in the *General* section. If no entry is located, check the CCID digits or name typed in the *Search* box.

DNIS-DIALED NUMBER IDENTIFICATION SERVICE

This section allows the CXM® Administrator to administer call recording for a DNIS. The term *DNIS* refers to Dialed Number Identification Service. From this screen, a DNIS can be added, updated, and deleted. Additionally, the CXM® Administrator can set up individual recording and email instructions for a call with a given DNIS. The following information is displayed for each DNIS: DNIS Number, DNIS Name, Sampling Rate, and Email Address.



To Add a DNIS:

1. To add a DNIS to the CXM® system, first select *Admin* and then *DNIS* from the options on the left side of the screen. You can also access the Admin->DNIS screen by clicking on *Admin* and *DNIS* from the CXM® menu.

2. Click the *Add* button located on the CXM® tool bar. This will bring up either the default DNIS template or a created template (if one has already been established) in the *General* section located in the lower portion of the screen. (*Templates will be discussed later in this section.)*

3. In the *General* section, there are two fields and two options that need to be completed in order to add a DNIS:
   - *Number:* The dialed number
   - *Name:* The name associated with the dialed number
   - *Sampling Rate:* This is the percent of the total calls with the given DNIS that is to be recorded. *To set this percentage, click and drag the slider to the desired percentage.*
   - *Do Not Record:* This option prohibits the recording of calls with the given DNIS.
4. The *Email* section allows the administrator to set all calls with a given DNIS to be emailed to a specific address. There are three options in the *Email section:*
   - *Email:* This option allows the CXM® Administrator to email a description of all calls with the selected DNIS to the given email address.
   - *Retain:* Select this option to keep the call on the CXM® system after it is emailed. Not selecting this option will result in the deletion of the call from the CXM® system.
   - *Attach:* This option allows the CXM® Administrator to attach the call's wave file to the email.
5. The *Address* field allows the CXM® Administrator to specify to which email address the calls with the given DNIS will be sent.
6. After all DNIS options have been entered, click the *OK* button, located in the lower right corner, to add the new DNIS. A confirmation message will appear at the bottom of the screen.

To Create and Access a DNIS Template:

Creating a DNIS Template will enable the CXM® Administrator to establish a set of default options for adding a DNIS to the CXM® System. The DNIS Template will appear in the lower part of the screen when the *Add* button is clicked.

1. To create a DNIS Template, click the *Templates* button located in the CXM® tool bar.
2. Enter the desired default DNIS Number and Name in the *Number* and *Name* fields. **Both of these fields must be entered in order to create a DNIS Template.**

3. Set the template (default) options in all desired fields.
4. Click the *OK* button in the lower right corner to finalize the details of the Template. A confirmation message will appear at the bottom of the screen. The Template has now been established.
5. To access the Template after it has been created, click the *Add* button located in the CXM® tool bar. The created Template will appear in the lower portion of the screen, and can now be used to add a new DNIS to the CXM® System.

To Update a DNIS:

1. To view and manage details for an existing DNIS, click the DNIS number or name in the DNIS list, or type the DNIS digits or name in the *Search* field located in the tool bar. The DNIS details will appear in the lower portion of the screen.
2. Before updating a DNIS profile, first make sure the DNIS appears in the *General section*.
3. Make all necessary amendments to the *General* and *Email* options.
4. After all necessary amendments are made to the DNIS profile, click *OK* in the bottom right corner to update the DNIS profile, or click the *Update* button located in the CXM® tool bar. A confirmation message will appear at the bottom of the screen.

To Delete a DNIS:

1. To delete a DNIS from the CXM® system, highlight the DNIS number or name in the DNIS list by clicking on it. The DNIS will appear in the *General* section.
2. Click the *Delete* button in the CXM® tool bar. A confirmation dialog box will appear. Click *OK* to delete the DNIS, or click *Cancel* to return to the DNIS screen.

To Search for a DNIS:

This option is designed to search for a DNIS by number or name in the existing DNIS list.

1. To search for a DNIS, type the DNIS number or name into the *Search* box located in the CXM® tool bar.
2. Click the *Search* button. *This function will only locate a DNIS that matches the Search command exactly.* When a matching DNIS is located, the DNIS details will be highlighted, and the DNIS profile will appear in the *General* section. If no entry is located, check the DNIS number or name typed in the *Search* box.

GROUPS

This section allows the CXM® Administrator to establish and manage Groups in the CXM® System. The term *Group* refers to a set of devices that can be grouped by category for ease in assigning rights to Agents and Users. From this screen, a Group can be added, updated, and deleted.

To **Add** a Group:

1. To add a Group to the CXM® system, first select *Admin* and then *Group* from the options on the left side of the screen. You can also access the Admin -> Group screen by clicking on *Admin* and *Group* from the CXM® menu.
2. There are two fields to complete in the *Manage Groups* section in order to add a Group:
   - *Name:* The name assigned to the Group
   - *Description:* A description of the Group

3. Click the *Add* button below the *Description* field to add the Group to the CXM® System. The Group name will appear in the *Groups* drop down box located at the top of the Groups screen once the Group has been added. **A Group must be added to the CXM® System before the CXM® Administrator can assign the devices to be included in that Group.**

4. To assign the devices to be included in a Group, first select the name of the Group from the *Groups* drop down box. The name and description of the Group will appear in the *Manage Groups* section.

5. Next, select a basis (from the *Basis* drop down box) by which to assign devices in the selected Group. The CXM® Administrator may assign devices based upon any or all of the following categories:

   - *Agents:* This option allows the CXM® Administrator to assign Agents to the given Group.
   - *Stations:* This option allows the CXM® Administrator to assign Stations to the given Group.
   - *VDNS:* This option allows the CXM® Administrator to assign VDNS to the given Group.
   - *Skills:* This option allows the CXM® Administrator to assign Skills to the given Group.
   - *Trunks:* This option allows the CXM® Administrator to assign Trunks to the given Group.
   - *Account Codes:* This option allows the CXM® Administrator to assign Account Codes to the given Group.
   - *CCID:* This option allows the CXM® Administrator to assign CCIDs to the given Group.
   - *DNIS:* This option allows the CXM® Administrator to assign DNISs to the given Group.
   - *Groups:* This option allows the CXM® Administrator to assign other Groups to the given Group.

6. The selected Group does not include any of the devices in the *Not in Groups* column. To include *ALL* of these devices, click the >> button. All of the devices will move from the *Not in Groups* column to the *In Groups* column. To include one of the devices in the *Not in Groups* column, highlight the device by

clicking on it. Then click the > button. The device will move from the *Not in Groups* column to the *In Groups* column.

7. If there are devices in the *In Groups* column that need to be removed, either click the << button to move *ALL* the devices to the *Not in Groups* column, or highlight one device at a time and then click the < button to move the selected entry to the *Not in Groups* column.
8. After all amendments have been made to the Group by the specified basis, click the *Update* button located below the *In Groups* column, or in the CXM® tool bar. A confirmation message will appear at the bottom of the screen. **Any addition or update of a basis must be finalized by clicking the *Update* button before moving to another basis.**
9. To add devices to the selected Group based on another category, select the new basis from the *Basis* drop down box, and repeat steps 6-9.

To Update a Group:

1. To view and manage details for an existing Group, select the Group from the *Groups* drop down box. The Group name and description will appear in the *Manage Groups* section.
2. Select a basis from the Basis drop down box. *Make* all necessary amendments to the Group's devices by that basis.
3. Click the *Update* button below the *In Groups* column to finalize the amendments for that basis. A confirmation message will appear at the bottom of the screen. **Any addition or update of a basis must be finalized by clicking the *Update* button before moving to another basis.**
4. To update devices to the selected Group based on another category, select the new basis from the *Basis* drop down box, and repeat steps 2-3.

To Delete a Group:

1. To delete a Group from the CXM® system, select the Group name from the *Groups* drop down box. The Group name and description will appear in the *Manage Groups* section.
2. Click the *Delete* button below the *Description* field, or click the *Delete Groups* button in the CXM® tool bar. A confirmation

dialog box will appear. Click *OK* to delete the Group, or click *Cancel* to return to the *Groups* screen.

SYSTEM LOGOUT

1. To log out of the CXM® System, click *My Login* in the bottom left corner, or from the CXM® menu. The *Logout* page will appear.
2. Click *Logout* to end your CXM® session. This will take you to the CXM® *Login* screen.