



CUSTOMEREXPERIENCEMANAGEMENT

AGENT PORTAL GUIDE

PURPOSE: This guide is intended to provide detailed instructions for users of CXM® Agent Portal.



CONTACT Co-nexus:

Co-nexus, Inc. 866.400.4CXM
5600 Northwest Central Dr Ste. 102
Houston, TX 77092

For more information about CXM®, see your CXM® representative or call 1-866-400-4296.

The purpose of this guide is to provide detailed instructions for users of CXM® Agent Portal. 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.

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TABLE OF CONTENTS

SYSTEM LOGIN	4
To Login to the CXM® System:	4
MY CALLS	5
To Search for Calls:	5
To Listen to a Call:	7
To Grade a Call:	7
MY EVALUATIONS	9
GRADED CALLS	9
To View a Graded Call:	10
SELF GRADING	11
To View a Self-Graded Call:	12
REPORTS	13
To View Graded Call Reports:	17
MY TRAINING	19
ASSIGNED VIDEOS	19
To Access an Assigned Video:	19
TESTS	20
To Complete an Assigned Test:	20
To View Completed Tests:	21
EXAMPLE CALLS	22
To Listen to an Example Call:.....	22
TRAINING LIBRARY	23
To View a Video from the Training Library:	23
MY BULLETINS	24
To View a Bulletin:	24
SYSTEM LOGOUT	25

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 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.

MY CALLS

Welcome to CXM® Agent Portal. From the *My Calls* → *Calls* screen (below) the Agent can search for, listen to and grade his/her own calls.

By default, calls made and received on the current day are listed in the Calls List. The Calls List is arranged by the following columns:

Call Date/Start Time: gives the date and time of the calls. The calls can be arranged in ascending or descending order by clicking the up or down arrow located next to the *Call Date/Start Time* column label. ▲ ▼

Call Duration: displays the length of the calls.

Caller ID: displays the number from which the call was received (for inbound calls).

Dialed: displays the number dialed by the Agent (for outbound calls).

The screenshot displays the 'My Calls' interface in the CXM Agent Portal. At the top, there are navigation tabs: 'My Calls', 'My Evaluations', 'My Training', 'My Bulletins', and 'My Help'. A 'Logout' button is visible. The main content area shows a table of call records. The table has the following columns: 'Call Date/Start Time', 'Call Duration', 'Caller ID', 'Dialed', and 'Queue'. The records are sorted by 'Call Date/Start Time' in descending order. Below the table, there is a search section with fields for 'Caller ID', 'Dialed', and 'Account Codes'. There are also 'From Date' and 'To Date' dropdown menus, both set to '8/1/2006'. A 'Search' button is located at the bottom of the search section. The search results show 'CALLS FOUND 16' and 'PAGE 1 of 2'. A status message at the bottom indicates 'Search completed successfully. (187 ms)'.

Call Date/Start Time	Call Duration	Caller ID	Dialed	Queue
8/1/2006 12:41:30 PM	00:00:37		912298902545	
8/1/2006 12:39:50 PM	00:01:31	2298902545	3934	
8/1/2006 12:15:28 PM	00:00:46		98327975184	
8/1/2006 11:43:07 AM	00:02:19	5862602553	3987	
8/1/2006 10:57:04 AM	00:00:58		92816473754	
8/1/2006 10:04:35 AM	00:01:14	2814431364	3934	
8/1/2006 10:01:52 AM	00:01:40		97139856417	
8/1/2006 10:00:46 AM	00:01:00		97139856435	
8/1/2006 9:52:11 AM	00:06:10	6082561901	3987	

To Search for Calls:

1. To perform a Search for a call in CXM® Agent Portal, first select *My Calls* from the options on the left side of the screen. You

can also access the My Calls → Calls screen by clicking on My Calls from the CXM® Agent Portal menu.

The screenshot shows a search form with the following fields and values:

- Caller ID:
- Dialed:
- Account Code:
- From Date: 8/1/2006 (dropdown)
- To Date: 8/1/2006 (dropdown)

Buttons: Reset, Search

2. CXM® Agent Portal will search for and display a list of all calls made during a given date range. To enter the desired *From Date* and *To Date* into the corresponding fields, either type the desired dates or select them from the drop-down boxes. For example, for a list of all calls made and received on July 7 and July 8, the Agent would enter 7/7/06 into the *From Date* field and 7/8/06 into the *To Date* Field. For a list of calls for one day only, enter the date of the desired day into both the *From Date* and *To Date* fields.
3. To perform the search based only on the date(s) of the calls, click the *Search* button now, or continue with Step 4 for further options.
4. To narrow the search further, enter the appropriate information into one or more of the following fields:
 - **Caller Id:** This option allows the Agent to search for all calls with the given Caller Id number (the number from which an inbound call was received). Enter the desired Caller Id number into the *Caller ID* field.
 - **Dialed Number:** This option allows the Agent to search for calls based upon the Dialed number (the number dialed by the Agent on an outbound call). Enter the desired Dialed Number into this field.
 - **Account Codes:** This option allows the Agent to search for calls based upon the Account Code associated with the call. Enter the desired Account Code into this field.
5. After all desired information has been entered into the appropriate fields in the Search box, click the *Search* button. A list of all calls that fit the given criteria will appear in the Calls List in the top section of the screen.

To Listen to a Call:



Listen to this Call Button

1. To Listen to a recorded call, click the *Listen to this Call* button (see above) located at the left end of the row in the Call List that contains the desired call. The call will automatically play on either the embedded player (located in the lower left section of the screen) or Windows Media Player.


CXM® Embedded Media Player



2. To use the CXM® Embedded Media player, click desired button(s). The buttons are “Play/Pause,” “Stop,” “Rewind,” “Fast Forward,” “Mute,” and “Volume Slider,” respectively.

To Grade a Call:

CXM® Agent Portal allows Agents with the proper rights to evaluate his/her own calls using Grading Forms to which the Agent has been given access.

1. To grade a call, first locate the desired call in the Call List. Refer to the [Search for Calls](#) section for instructions to search for a call.
2. To grade a call from the Calls list, click the *Grade this Call* icon  located in the row corresponding to the call to be graded. A *Grade New Call* box will appear.
3. Select (from the drop-down box) the Grading Form to be used to evaluate the call. Click the *Select* button. The Grading Form will appear along with the audio player to listen to the call (see below).



4. To listen to the call while completing the Grading Form, click the “Play” button in the audio player (right side).
5. Answer the questions under the first section tab of the Grading Form by clicking the radio button corresponding to the appropriate answer choice.
6. Repeat step 5 for all section tabs of the Grading Form. A summary of the section grades and total grade can be listed at the bottom of the screen by clicking (view section scores).
7. After all sections of the Grading Form have been completed, click the *Done* button to finalize the grade. A dialog box will appear to confirm the completion of the grade.

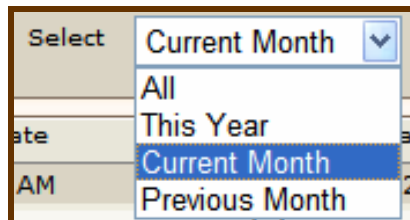
MY EVALUATIONS

The My Evaluations section of CXM® Agent Portal allows the Agent to view graded calls and summary reports based on the Agent's graded calls.

Call Date	Evaluation Date	Form Name	Evaluator
8/1/2006 10:04:35 AM	8/1/2006 10:27:00 AM	Laser	cameron.ediger
7/3/2006 8:15:29 AM	8/1/2006 10:29:00 AM	MySections	cameron.ediger
7/3/2006 10:20:14 AM	8/1/2006 10:30:00 AM	PMI	cameron.ediger
7/5/2006 6:46:21 AM	8/1/2006 10:31:00 AM	MyQuestions	cameron.ediger
7/6/2006 8:06:32 AM	8/1/2006 10:33:00 AM	MySections	cameron.ediger
7/6/2006 8:21:17 AM	8/1/2006 10:33:00 AM	RockStar	cameron.ediger
7/6/2006 9:57:07 AM	8/1/2006 10:34:00 AM	TW Maine Sales	cameron.ediger
7/6/2006 10:15:01 AM	8/1/2006 10:35:00 AM	Laser	cameron.ediger
7/6/2006 4:46:11 PM	8/1/2006 10:36:00 AM	PMI	cameron.ediger
7/7/2006 9:27:36 AM	8/1/2006 10:38:00 AM	PMI	cameron.ediger
7/7/2006 10:09:37 AM	8/1/2006 10:39:00 AM	MyQuestions	cameron.ediger
7/11/2006 6:26:03 AM	8/1/2006 10:41:00 AM	MyQuestions	cameron.ediger
7/12/2006 1:33:42 PM	8/1/2006 10:41:00 AM	RockStar	cameron.ediger
7/13/2006 2:12:29 PM	8/1/2006 10:42:00 AM	TW Maine Sales	cameron.ediger
7/13/2006 2:25:05 PM	8/1/2006 10:43:00 AM	TW Maine Sales	cameron.ediger
7/14/2006 9:11:38 AM	8/1/2006 10:43:00 AM	TW Maine Sales	cameron.ediger
7/14/2006 9:50:05 AM	8/1/2006 10:44:00 AM	Laser	cameron.ediger
7/17/2006 9:07:07 AM	8/1/2006 10:45:00 AM	Laser	cameron.ediger
7/18/2006 9:15:01 AM	8/1/2006 10:46:00 AM	TW Maine Sales	cameron.ediger
7/19/2006 10:44:39 AM	8/1/2006 10:47:00 AM	RockStar	cameron.ediger
7/20/2006 9:18:22 AM	8/1/2006 10:48:00 AM	MyQuestions	cameron.ediger
7/21/2006 9:05:52 AM	8/1/2006 10:49:00 AM	TW Maine Sales	cameron.ediger
7/24/2006 11:27:25 AM	8/1/2006 10:50:00 AM	PMI	cameron.ediger
7/27/2006 9:51:32 AM	8/1/2006 10:53:00 AM	PMI	cameron.ediger

GRADED CALLS

By default, the Graded Calls list displays all calls that were graded during the current month. CXM® Agent Portal will display a list of *All* graded calls, calls graded *This Year*, calls graded during the *Current Month*, or calls graded during the *Previous Month*. **Note: This is the evaluation date, rather than the date the call was made.** The drop-down box located at the top of the screen can be used to change the date range when listing graded calls. Select the desired criteria from the drop-down box and click *Select*.



The Graded Calls List is arranged by the following columns:


Call Date: the date/time the call was made/received

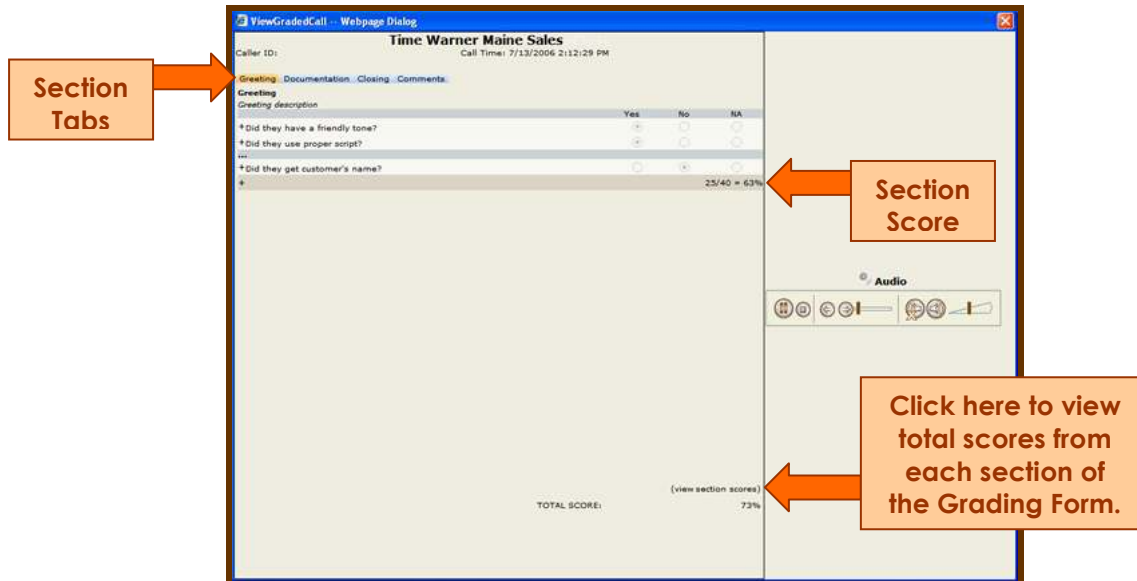
Evaluation Date: the date/time the call was graded (evaluated)

Form Name: the name of the Grading Form used to evaluate the call

Evaluator: the name of the person who graded the call

To View a Graded Call:

1. To view a graded call, first select *My Evaluation* and then *Graded Calls* from the options on the left side of the screen. You can also access the *My Evaluation* → *Graded Calls* screen by clicking on *My Evaluation* and *Graded Calls* from the CXM® Agent Portal menu.
2. Locate the desired Graded call in the Graded Call List. See the [Graded Calls](#) section for instructions regarding the Graded Calls List.
3. Click on the *View this Graded Call* icon  located in the row containing the call to be viewed. The Grading Form will appear with all of the grader's answers completed. **Note: Although completed grading forms can be viewed, the answers may not be changed.**

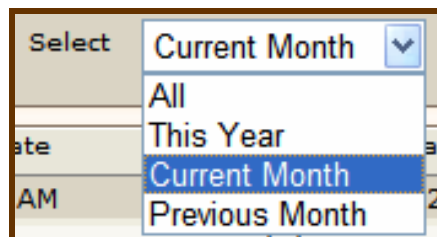


4. The call will automatically begin playing on the embedded player (right side). For instructions on the use of the embedded player, see [Embedded Player](#).
5. Each section of the completed Grading Form can be viewed by clicking on the section tabs (see above).
6. In the lower right corner of the Grading Form screen, the total score of the evaluation is shown. For a section breakdown of the score, click on the words "view section scores" (see above).
7. After the completed Grading Form has been viewed, click the X(Close) button to exit the Grading Form.

SELF GRADING



By default, the Self-Graded Calls list displays all calls that were graded by the Agent during the current month. CXM® Agent Portal will display a list of *All* self-graded calls, calls graded *This Year*, calls graded during the *Current Month*, or calls graded during the *Previous Month*. **Note: This is the evaluation date, rather than the date the call was made.** The drop-down box located at the top of the screen can be used to change the date range when listing graded calls. Select the desired criteria from the drop-down box and click *Select*.




The Self-Graded Calls List is arranged by the following columns:

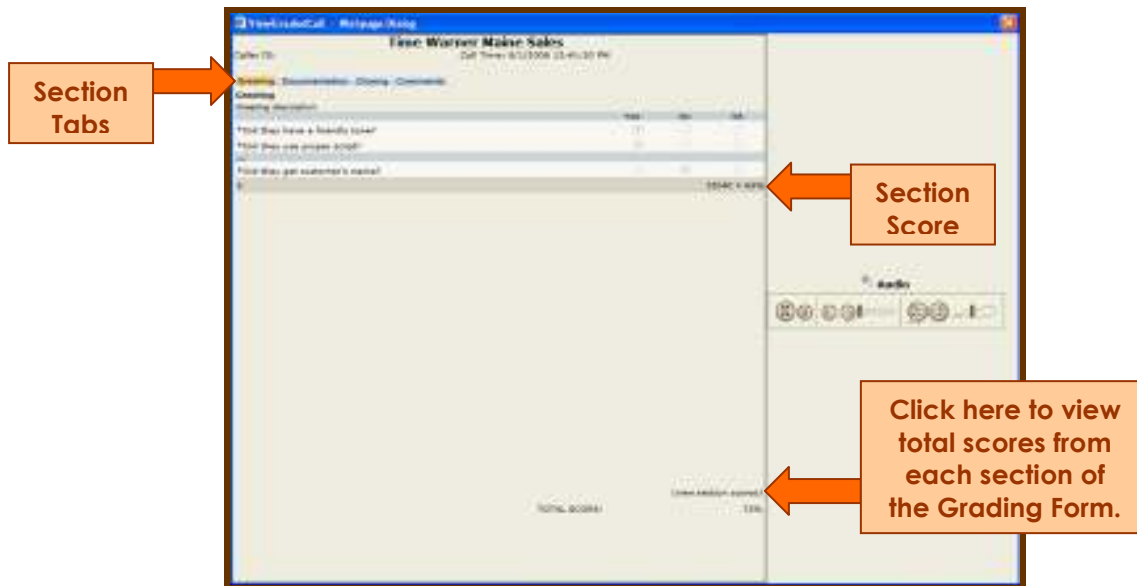
Call Date: the date/time the call was made/received

Evaluation Date: the date/time the call was graded (evaluated)

Form Name: the name of the Grading Form used to evaluate the call

To View a Self-Graded Call:

1. To view a graded call, first select *My Evaluation* and then *Self Grading* from the options on the left side of the screen. You can also access the My Evaluation → Self Grading screen by clicking on *My Evaluation* and *Self Grading* from the CXM® Agent Portal menu.
2. Locate the desired Self-Graded call in the Self-Graded Call List. See the [Self-Graded Calls](#) section for instructions regarding the Self-Graded Calls List.
3. Click on the *View this Graded Call* icon  located in the row containing the call to be viewed. The Grading Form will appear with all of the answers completed. **Note: Although completed grading forms can be viewed, the answers may not be changed.**



4. The call will automatically begin playing on the embedded player (right side). For instructions on the use of the embedded player, see [Embedded Player](#).

5. Each section of the completed Grading Form can be viewed by clicking on the section tabs (see above).
6. In the lower right corner of the Grading Form screen, the total score of the evaluation is shown. For a section breakdown of the score, click on the words “view section scores” (see above).
7. After the completed Grading Form has been viewed, click the X(Close) button to exit the Grading Form.

REPORTS

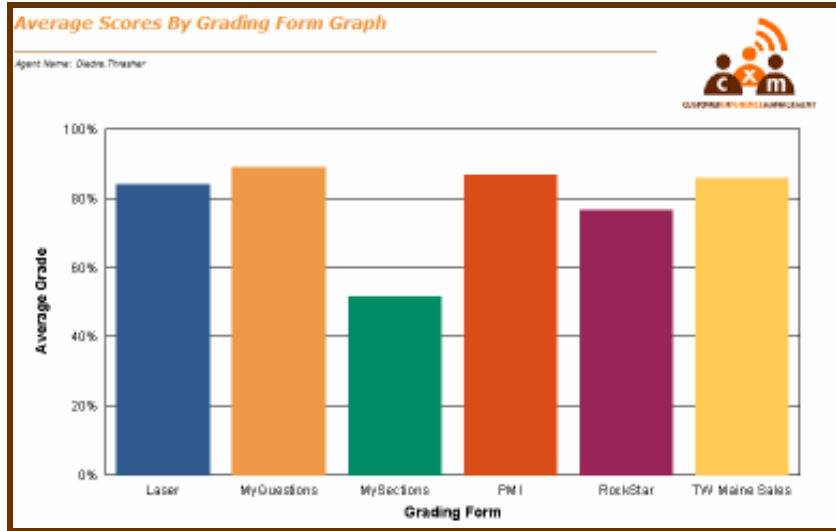
The Reports section of CXM® Agent Portal allows the Agent to view a variety of reports that represent the scores received on graded calls.

CXM® Agent Portal Report Styles:

Average Score by Grading Form: Lists each type of Grading Form used during the given time period and the average of all the scores received for that type of Grading Form.

Grading Form	Average Score
Laser	84.0%
MyQuestions	88.0%
MySections	51.7%
PMI	88.7%
RockStar	76.8%
TW Maine Sales	85.9%
Overall Average Score: 79.0%	

Average Score by Grading Form Graph: Gives, in bar graph format, the average score for each type of Grading Form used.



Average Score by Question: Lists each question on the given Grading Form and reports the average score received on each question.

Average By Question

July 03, 2006 to August 01, 2006

Grading Form: TW Maine Sales

Agent: Diane Thrasher

#	Question	Average Score
1	Did they have a friendly tone?	100%
2	Did they use proper script?	80%
3	Did they get customer's name?	71%
4	Were they thorough?	95%

Score by Day of Week: For each selected Grading Form, this Report lists the days of the week and average scores received on graded calls made/received on each day of the week.

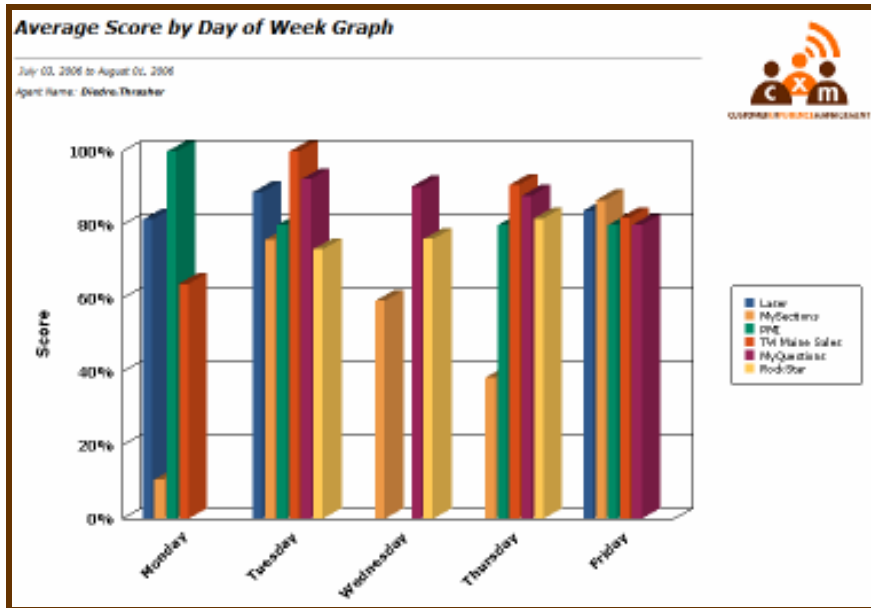
Average Score by Day of Week

July 03, 2006 to August 01, 2006

Agent Name: Diane Thrasher

Grading Form	Day of Week	Average Score
Laser	Monday	81.5%
	Tuesday	89.0%
	Friday	84.0%
MyQuestions	Tuesday	92.5%
	Wednesday	90.5%
	Thursday	88.0%
	Friday	90.0%

Score by Day of Week Graph: Gives, in bar graph format, the average score received for each Grading Form used on each day of the week.



Scores Over Time by Month: For each Grading Form used during a given time period, this Report will list each time the Grading Form was used along with the month it was used and the score received. At the bottom of each Grading Form section, the average score for that Grading Form will appear.

Scores Over Time by Month
 July 03, 2006 to August 01, 2006
 Agent Name: Diedra Thrasher

Grading Form	Month	Average Score
Laser	July 2006	79.0%
	July 2006	84.0%
	July 2006	84.0%
	July 2006	89.0%
	Average Score: 84.0%	
MyQuestions	July 2006	86.5%
	July 2006	86.0%
	July 2006	88.0%
	July 2006	88.0%
	July 2006	90.0%
Average Score: 89.0%		

Scores Over Time by Month Graph: Gives, in line graph format, the average scores for each Grading Form used during each month of the given time period. The average scores are connected by lines to show change over time.



Scores Over Time by Week: For each selected Grading Form, this Report lists the average scores received each week the Grading Form was used, followed by the total average score received using the Grading Form.

Scores Over Time by Week

July 03, 2006 to August 01, 2006
Agent Name: Diadra Thrasher

Grading Form	Week	Average Score
Laster	7/3/2006	79.0%
	7/9/2006	84.0%
	7/16/2006	84.0%
	7/23/2006	89.0%
	Average Score:	84.0%
MyQuestions	7/3/2006	86.0%
	7/9/2006	86.0%
	7/16/2006	88.0%
	7/23/2006	88.0%
	7/30/2006	90.0%
Average Score:	89.0%	

Scores Over Time by Week Graph: Gives, in line graph format, the average weekly score for each given Grading Form. The average scores are connected by lines to show change over time.



Scores Over Time Detailed: For each given Grading Form, this Report lists the date and time the calls were graded, the name of the evaluator and the score received, followed by the total average score received for that Grading Form.

Date/Time	Evaluated By	Score
Laser		
8/1/2008 10:27:30AM	cameron ediger	95.0%
8/1/2008 10:44:30AM	cameron ediger	94.0%
8/1/2008 10:45:30AM	cameron ediger	94.0%
8/1/2008 11:31:30AM	cameron ediger	79.0%
		Grading Form Average: 84.8%
MyQuestions		
8/1/2008 10:31:30AM	cameron ediger	93.0%
8/1/2008 10:39:30AM	cameron ediger	90.0%
8/1/2008 10:41:30AM	cameron ediger	95.0%
8/1/2008 10:48:30AM	cameron ediger	88.0%
8/1/2008 11:05:30AM	cameron ediger	88.0%
8/1/2008 11:55:30AM	cameron ediger	90.0%
		Grading Form Average: 89.9%
MySections		
8/1/2008 10:29:30AM	cameron ediger	10.8%
8/1/2008 10:33:30AM	cameron ediger	18.0%
8/1/2008 11:03:30AM	cameron ediger	27.8%
8/1/2008 11:04:30AM	cameron ediger	38.8%
8/1/2008 11:09:30AM	cameron ediger	39.0%
8/1/2008 11:10:30AM	cameron ediger	78.0%
		Grading Form Average: 51.7%
FPI		
8/1/2008 10:30:30AM	cameron ediger	100.0%

To View Graded Call Reports:



1. To view a report, first select *My Evaluation* and then *Reports* from the options on the left side of the screen. You can also access the *My Evaluation* → *Reports* screen by clicking on *My Evaluation* and *Reports* from the CXM® Agent Portal menu.
2. To view a report, click to highlight the name of the desired report in the Reports List. See the [Report Styles](#) section for a

complete list and description of each Report style. Depending upon which report is selected, one of these two Report Criteria boxes will appear on the right side of the screen:



3. Enter the appropriate information into the corresponding fields in the Report Criteria box:

Start Date/End Date: CXM® Agent Portal will locate and compile scores from Grading Forms completed during the time range given by the Agent. For example, to see a report for the graded calls evaluated between 7/3/06 and 8/1/06, enter "7/3/06" into the *Start Date* field and "8/1/06" into the *End Date* field. These values can be entered either by typing the dates or selecting them from the drop-down boxes.

Include Self Graded?: Selecting this option will result in the inclusion of self-graded calls in the Report averages.

Grading Form: Some Reports require a Grading Form (or All Grading Forms) to be selected for use in the Report.

4. After all information has been entered into Report Criteria fields, click the *View Report* button. The desired Report will appear. See the [Report Styles](#) section for a complete list and description of each Report style.

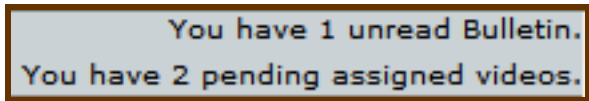
MY TRAINING

The *My Training* section of CXM® Agent Portal allows the Agent to view training videos, view and take assigned tests, and listen to sample calls that have been suggested for training purposes.

ASSIGNED VIDEOS

To Access an Assigned Video:

Two links appear in the top right corner of the CXM® Agent Portal screen at all times to alert the Agent to unread bulletins and pending assigned videos:



1. To access an assigned video, first select *My Training* and then *Assigned Videos* from the options on the left side of the screen. You can also access the *My Training* → *Assigned Videos* screen by clicking on the link that says, "You have (#) pending assigned videos". The *My Training* → *Assigned Videos* screen will appear:



The Assigned Videos list will appear with all training videos that have been assigned to the Agent for viewing. The list includes the video name, a brief description of the video, the date by which the video is to be viewed (set by the person who assigned the video), and a record of the date the video was viewed (when applicable).

2. Click to highlight the row in the Assigned Videos List containing the video to be viewed.
3. Click the *View This Video* icon (below) located at the left end of the row.



4. Windows Media Player or the default media player will appear for playing the selected video.

TESTS

When a Test has been assigned to an Agent, it can be accessed and completed from the *My Training* → *Tests* screen. After a Test has been completed, it can also be viewed from this screen; however, it cannot be modified. The Test List that appears includes the name of the Test, the date the Test was assigned, the date by which the Test is to be completed, and the date the Test was completed (or a note indicating that it is not completed).

	Test Name	Date Assigned	Date Due	Date Completed
My Calls	▶ CameronTest	8/1/2006 9:46:00 AM	8/5/2006 12:00:00 AM	Not Completed
My Evaluations	▶ Employee Handbook Test	8/1/2006 9:47:00 AM	8/5/2006 12:00:00 AM	8/1/2006 9:49:00 AM
My Training (2)	▶ Copy Of - Employee Handbook Test	8/1/2006 9:51:00 AM	8/5/2006 12:00:00 AM	8/1/2006 9:52:00 AM

To Complete an Assigned Test:

1. To complete an Assigned Test, first select *My Training* and then *Tests* from the options on the left side of the screen. You can also access the *My Training* → *Tests* screen by clicking on *My Training* and *Tests* from the CXM® Agent Portal menu. An Assigned Tests List will appear (see above).
2. Locate and click on the name of the Test to be completed. The Test will appear.
3. Answer each question by clicking the appropriate radio button, then click *Next*.

Some tests may give a message indicating whether the answer is correct. Additionally, some tests may allow the Agent to return to previous questions in the test, however, the Agent

may not change any answers. (These features are optional for the writer of the test.)

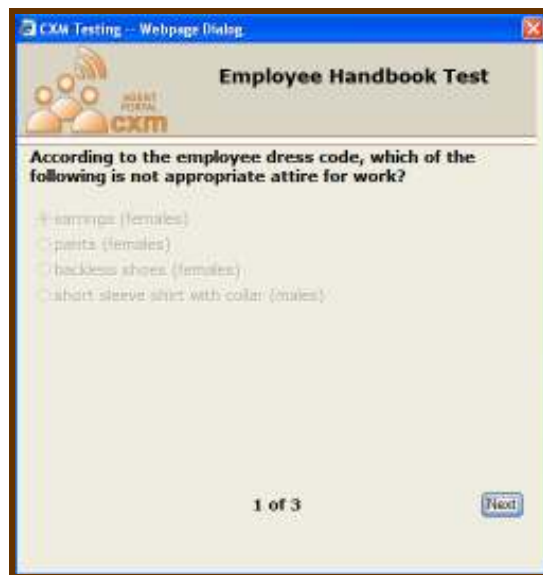
4. After a Test has been completed, the date/time of completion will appear in the *Date Completed* column.

To View Completed Tests:

After a Test has been completed, a date and time will appear in the *Date Completed* column. Completed Tests may be viewed, however, the answers may not be changed.

	Test Name	Date Assigned	Date Due	Date Completed
My Calls				
My Evaluations				
My Training (2)				
Assigned Videos				
Tests				
Example Calls				
Training Library				
	▶ CameronTest	8/1/2006 9:46:00 AM	8/5/2006 12:00:00 AM	Not Completed
	▶ Employee Handbook Test	8/1/2006 9:47:00 AM	8/5/2006 12:00:00 AM	8/1/2006 9:49:00 AM
	▶ Copy Of - Employee Handbook Test	8/1/2006 9:51:00 AM	8/5/2006 12:00:00 AM	8/1/2006 9:52:00 AM

1. To view a completed Test, first select *My Training* and then *Tests* from the options on the left side of the screen. You can also access the *My Training* → *Tests* screen by clicking on *My Training* and *Tests* from the CXM® Agent Portal menu. An Assigned Tests List will appear (see above).
2. Locate and click on the name of the Test in the Test List. The completed Test will appear. The Agent's answers will be indicated, however, they will be grayed out so they cannot be changed.



3. Navigate through each question of the Test using the *Next* and *Previous* buttons located at the bottom of the screen.

Some tests may give a score following the final question. (This is optional for the writer of the Test.)

EXAMPLE CALLS

The *My Training* → *Example Calls* section of CXM® Agent Portal gives the Agent access to example calls for training purposes. A list of Call Buckets appears on the left side of the screen ("Bucket Name"). Each Call Bucket listed contains one or more example calls.



To Listen to an Example Call:

1. To listen to an example call, first select *My Training* and then *Example Calls* from the options on the left side of the screen. You can also access the *My Training* → *Example Calls* screen by clicking on *My Training* and *Example Calls* from the CXM® Agent Portal menu.
2. Click to highlight the name of the Call Bucket containing the desired example call. A list of all calls located in this Call Bucket will appear on the right side of the screen (see above). These calls are listed by the date/time the call was made/received.

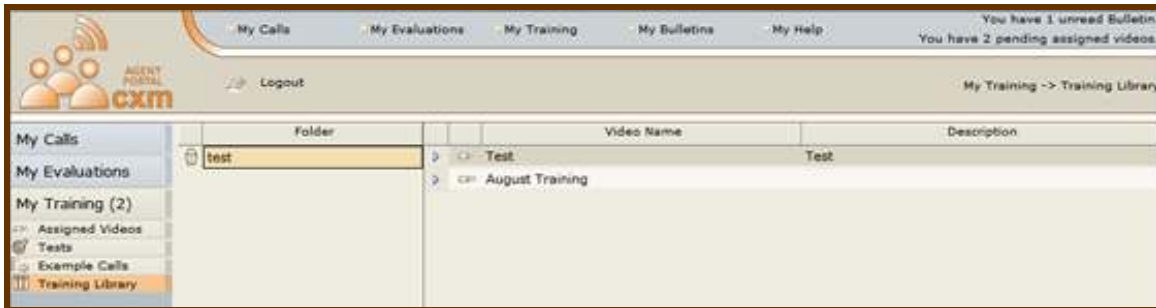
3. Click to highlight the row containing the desired call.
4. Click the *Listen to this Call* icon (below) located at the left end of the row.



The call will automatically begin to play on the embedded player located at the bottom of the screen. For further instructions on the use of the embedded player, see the [Embedded Media Player](#) section.

TRAINING LIBRARY

The CXM® Agent Portal Training Library contains all of the training videos that have been made for public use.



To View a Video from the Training Library:

1. To view a video from the Training Library, first select *My Training* and then *Training Library* from the options on the left side of the screen. You can also access the *My Training* → *Training Library* screen by clicking on *My Training* and *Training Library* from the CXM® Agent Portal menu. A list of Folders appears on the left side of the screen. Each Folder listed contains one or more Training Videos.
2. Click on the name of the Folder that contains the video to be viewed. A list of all videos in this Folder will appear on the right side of the screen.
3. Click to highlight the row containing the name of the video.
4. Click the *View this Video* icon (below) located at the left end of the row.

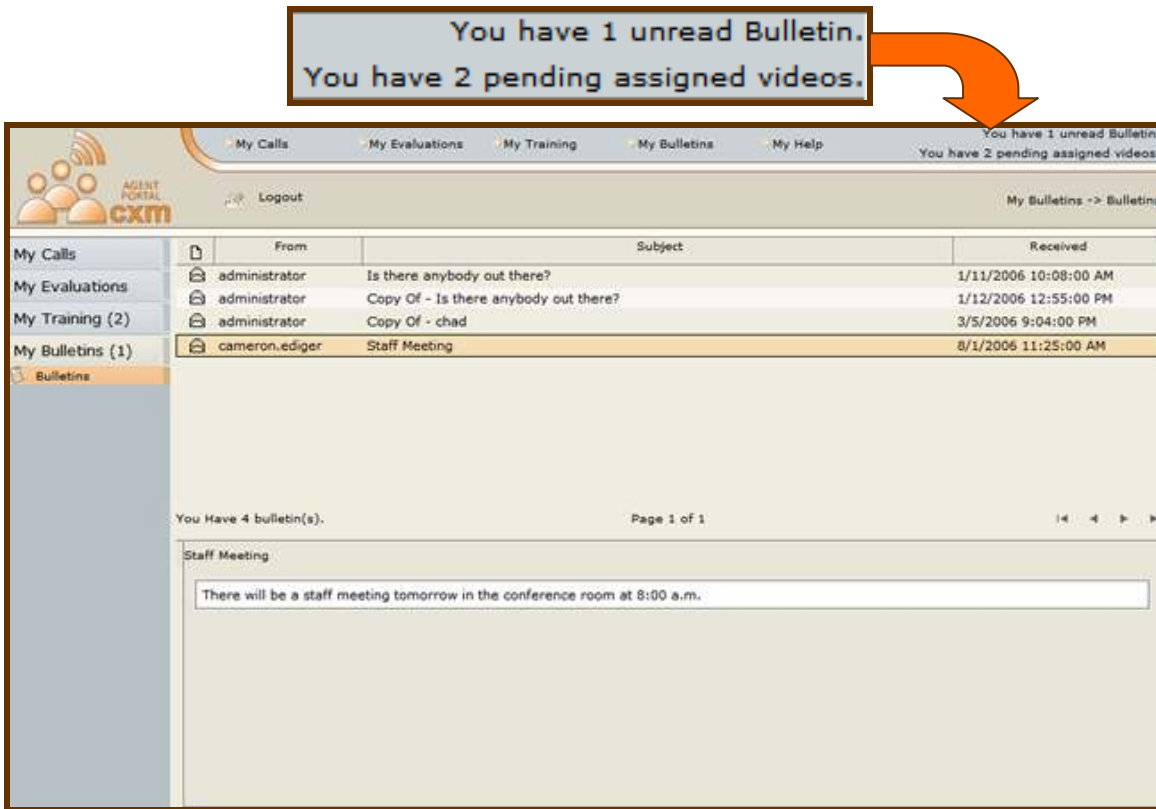


The default media player will appear for playing the video.

MY BULLETINS

To View a Bulletin:

The link that says “You have (#) unread Bulletins” (see below), located in the top right corner of the CXM® Agent Portal screen at all times notifies the Agent of recently received Bulletins. The *My Bulletins* page can be accessed by clicking on this link, or by clicking on *My Bulletins* in the lower left corner.



The *My Bulletins* section lists and stores all Bulletins that have been assigned for the Agent to read. Bulletins in the list that have not been read are labeled with a closed envelope, while Bulletins that have been read are labeled with an open envelope.

The Bulletin List also indicates who sent the Bulletin, the subject of the Bulletin and the date/time the Bulletin was received. All Bulletins will remain in the Bulletin List until its expiration date (set by the sender).

1. To view a Bulletin in the Bulletin List, click to highlight the row containing the Bulletin to be read.
2. The Bulletin will appear in the lower portion of the screen.

SYSTEM LOGOUT

To log out of CXM® Agent Portal, click the *Logout* button located in the top left corner below the CXM® Agent Portal menu.

