

HELP

CXPoint Client Application User

1. Client User Login

1.1 How new user will set password and login for the first time in dashboard?

Step 1. Open the email containing the account setup link and click on it.

Step 2. Enter email and OTP. Then click on Change Password.

Step 3. Set new password and Confirm Password. Then click on Change Password.

Step 4. To login enter Email and Password.

Step 5. To Authenticate, download and use Microsoft Authenticator App and Scan the QR Code then choose Next.

Step 6. Enter one time Password Code then choose Next.

Step 7. Approve the notification we're sending to your app.

Step 8. Once the notification is approved you are authenticated.

[*Click here to go back to list of questions*](#)

1.2 How does a registered user Login?

Step 1. Registered user will open application.

Step 2. Enter your email and password then click on login.

Step 3. Approve notification or code on Authenticator app.

Step 4. Enter One Time Password Code and choose Submit.

[*To go back to list of questions click here*](#)

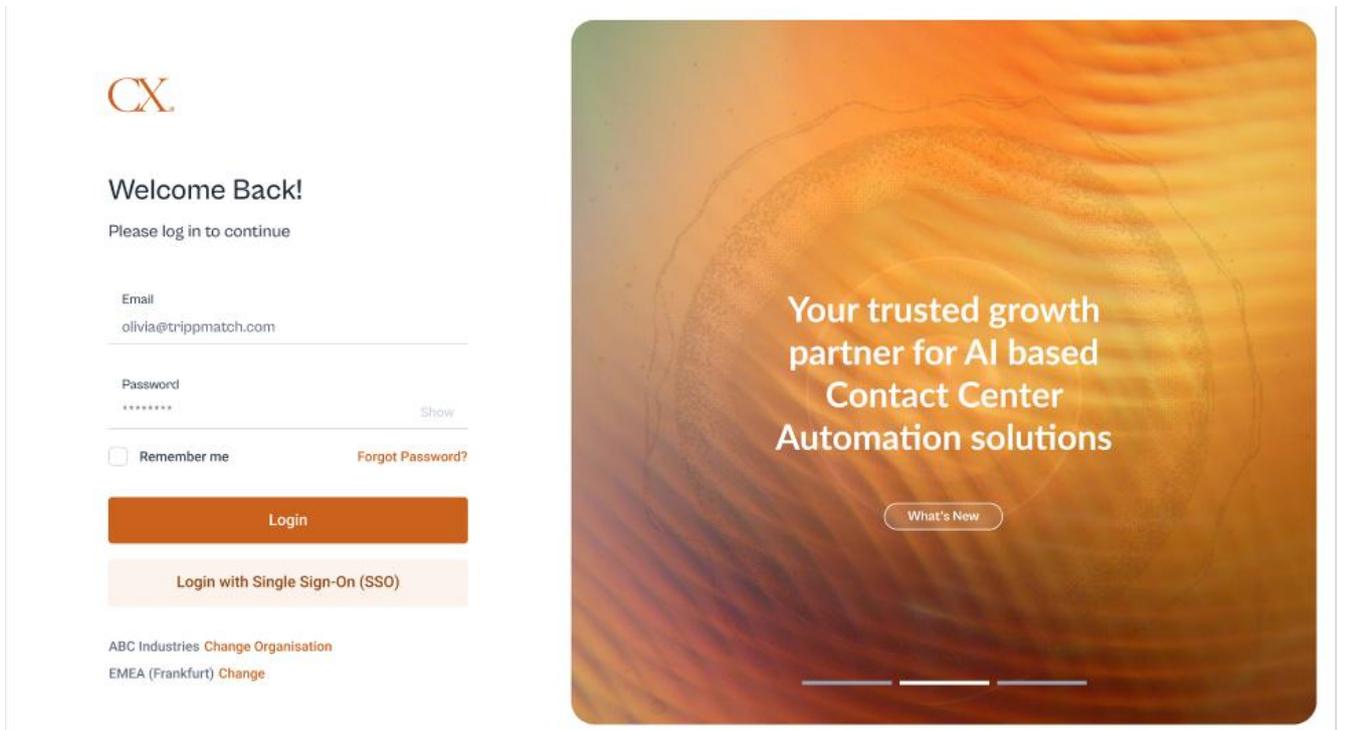
1.3 How Single Sign-on Works?

Step 1. Login with Single Sign-On (SSO)

Step 2. Enter your Single Sign-On email.

Step 3. Verification link will be sent to your email.

Step 4. Verify/Approve from your email.



[To go back to list of questions click here](#)

1.4 How to reset Forgot Password?

Step 1. Enter your email.

Step 2. Click on send OTP on Authenticator App.

Step 3. Enter and Verify code.

Step 4. Create new Password.

Step 5. Login with new Password.

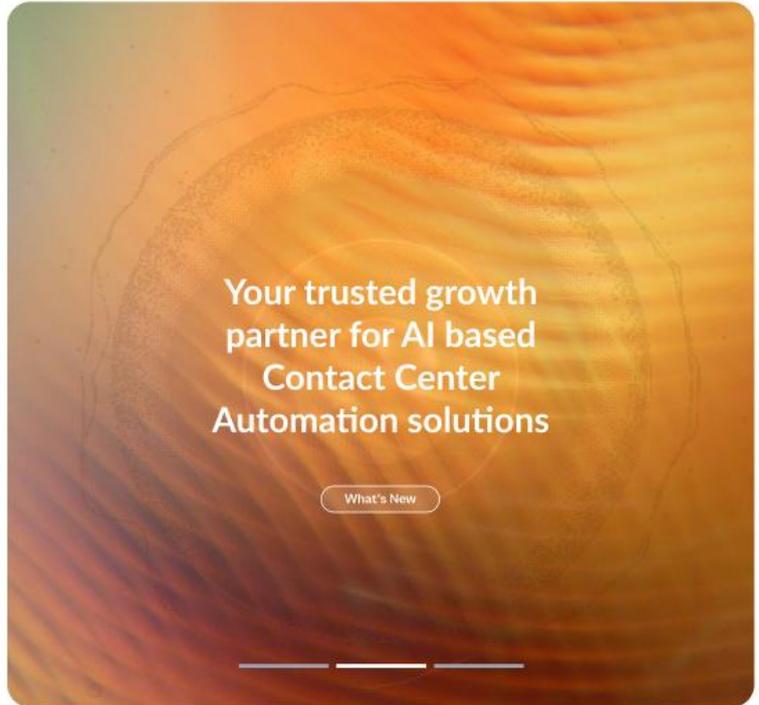


Forgot Password

Enter your email

Email
olivia@trippmatch.com

Send OTP on Authenticator App



[To go back to list of questions click here](#)

1.5 How to change region?

Step 1. Go to login page.

Step 2. Click on Change Region.



Welcome Back!

Please log in to continue

Email
olivia@trippmatch.com

Password
..... [Show](#)

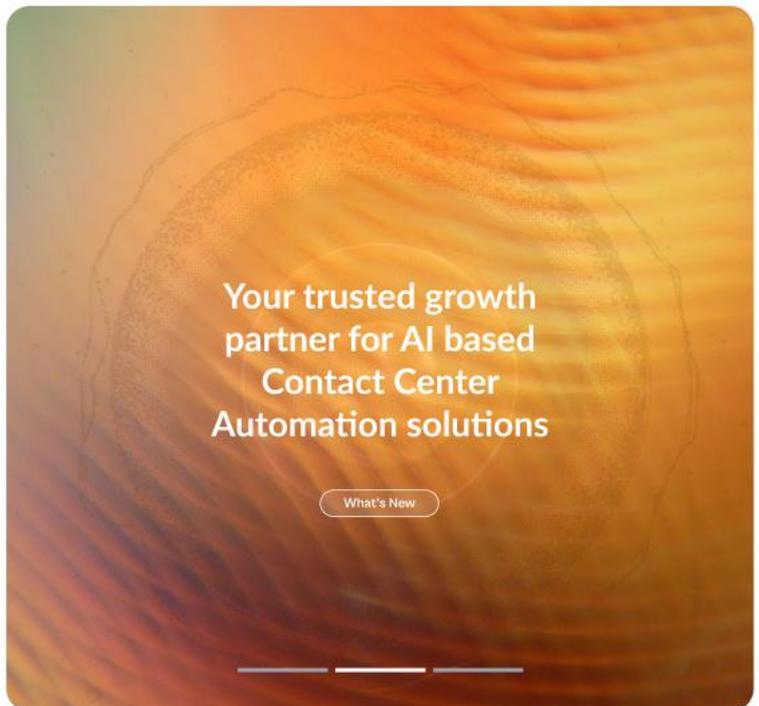
Remember me [Forgot Password?](#)

Login

Login with Single Sign-On (SSO)

ABC Industries [Change Organisation](#)

EMEA (Frankfurt) [Change](#)



Step 3. Select Region and click on submit.

[To go back to list of questions click here](#)

1.6 How to change organization?

Step 1. Go to login page.

Step 2. Click on Change Organization.



Welcome Back!

Please log in to continue

Email

olivia@trippmatch.com

Password

Show

Remember me

[Forgot Password?](#)

Login

Login with Single Sign-On (SSO)

ABC Industries [Change Organisation](#)

EMEA (Frankfurt) [Change](#)

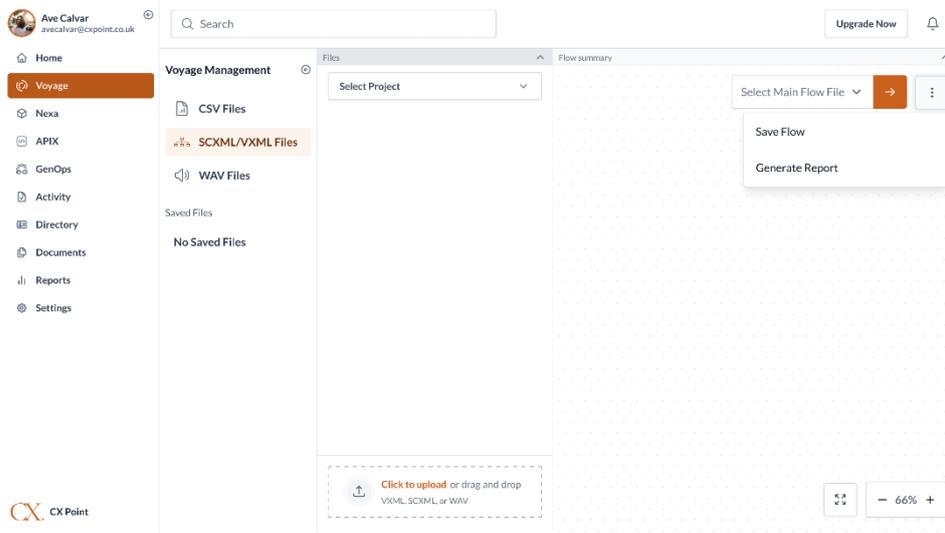
Step 3. Enter your organization name and select continue.

[To go back to list of questions click here](#)

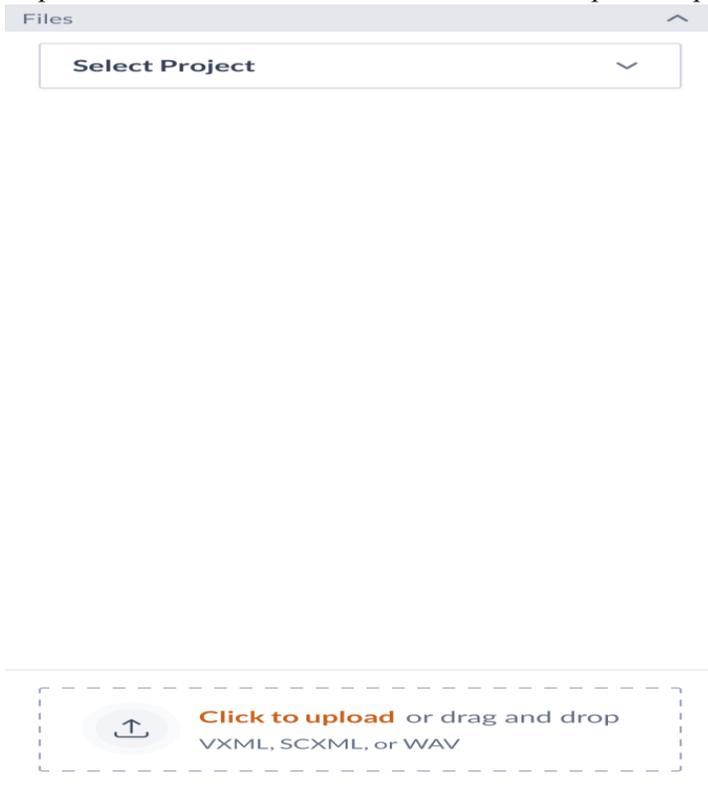
Voyage User

1. How to save to workspace in Voyage?

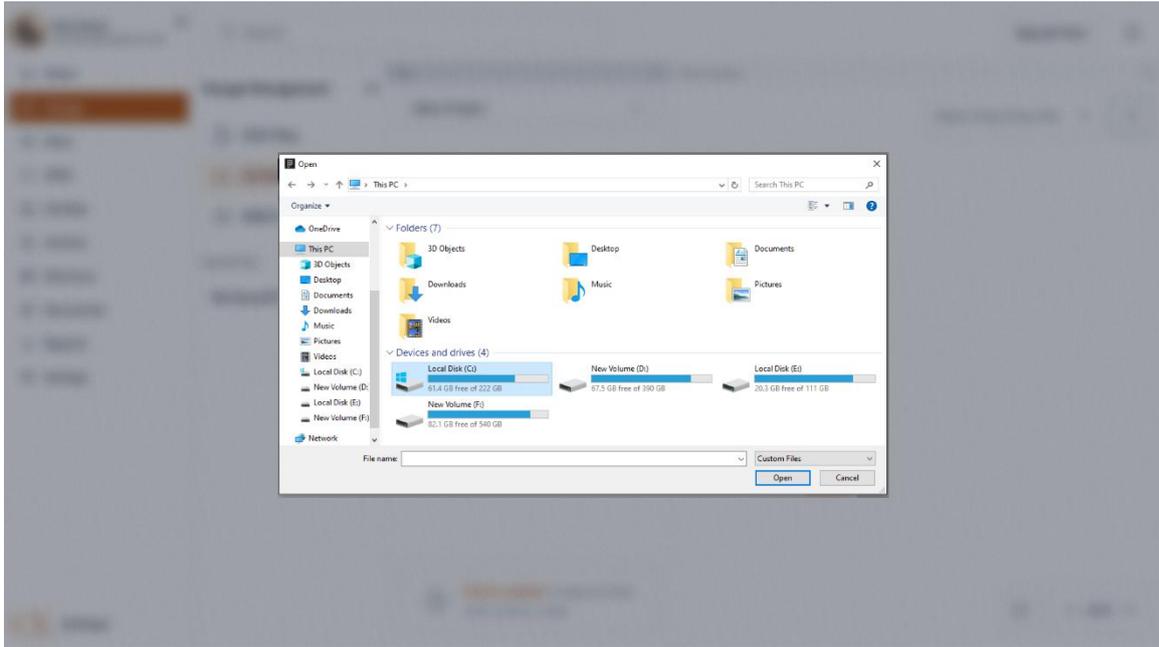
Step1. Go to Voyage page.



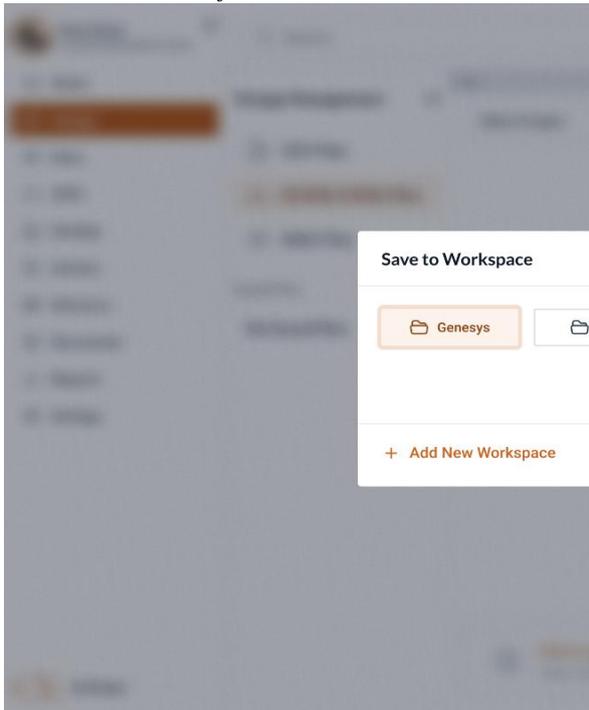
Step2. Go to Files Section & Click on “Click to Upload” option.



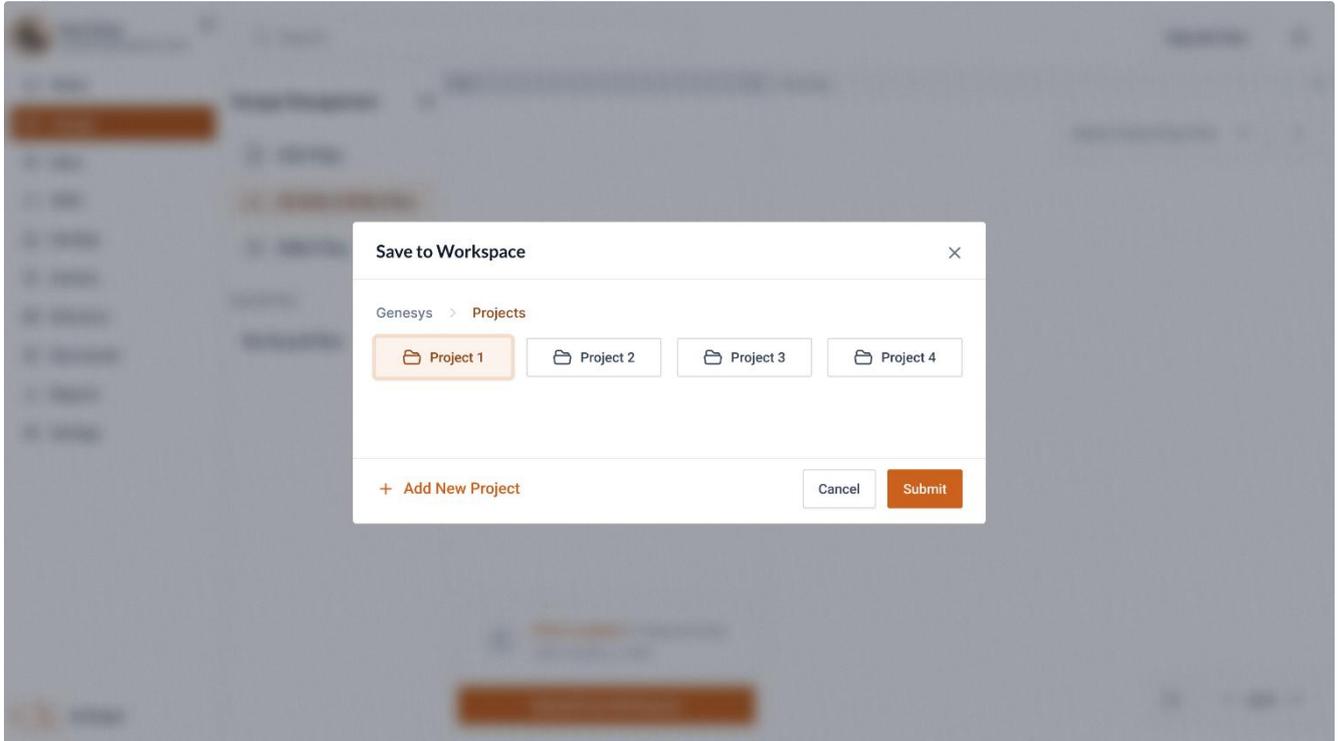
Step3. Select the File to be uploaded and click on “Open”.



Step 4. Select the Workspace or can create new workspace by clicking “Add new workspace” in which you wish store the selected file.



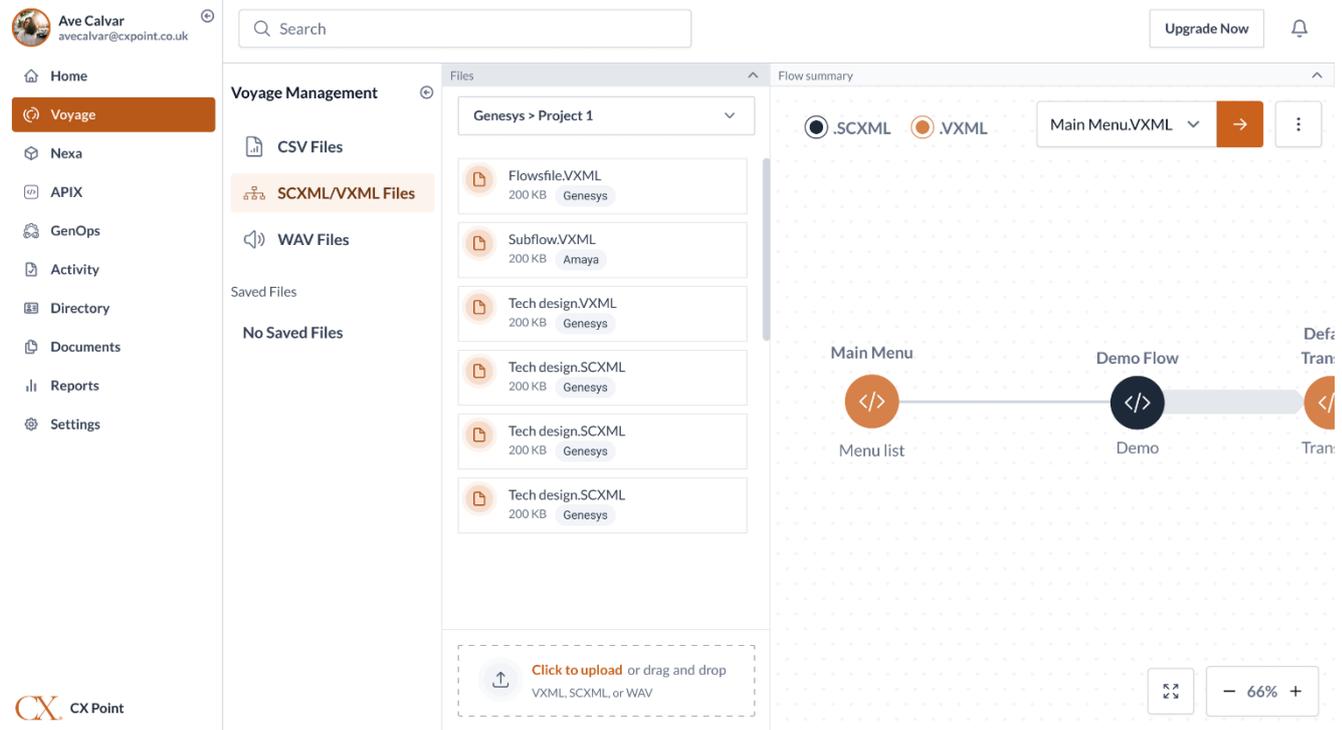
Step 5. Select the Project from selected workspace and click on ‘Submit’ to save the file.



[To go back to list of questions click here](#)

2. Flow Summary & Flow discovery

Step 1. Go to Voyage> Select File from Workspace to view flow summary.



Step 2. Select the category of flow from "Discovery of flows" section.

The screenshot shows the 'Discovery of Flows' section in the CX Point interface. The 'Call Flow' category is selected. Below the category selection, there is a table with the following data:

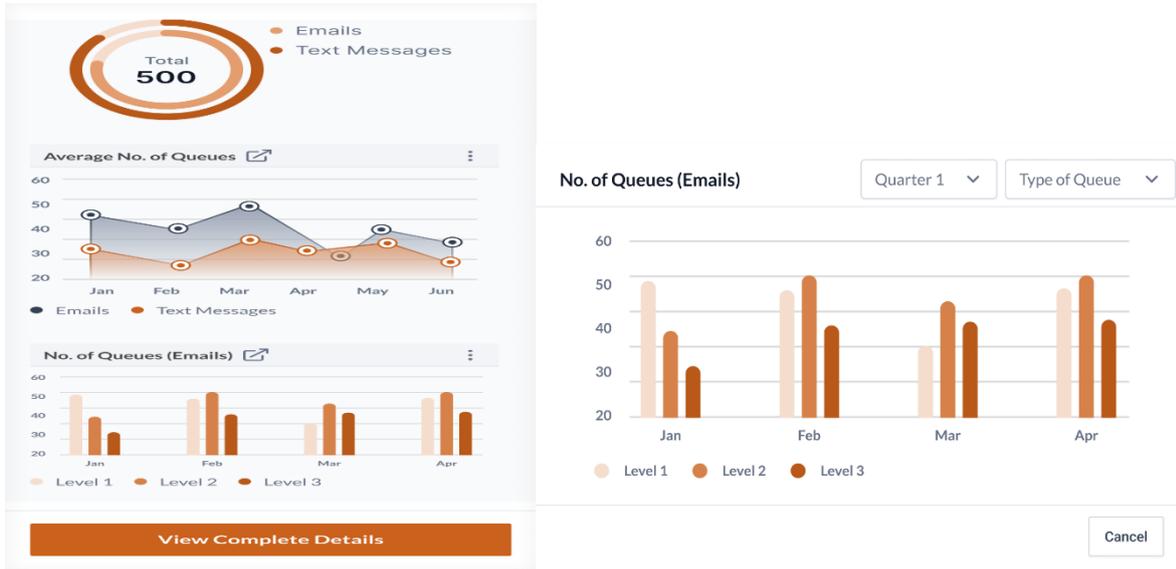
File Name	Previous	Next
Main Menu .VXML	-	Demo Flow .VXML
Demo Flow .VXML	Main Menu .VXML	Default Tra... .VXML
Default Tr... .VXML	Demo Flow .VXML	Route to Agent .VXML
		Route on DNIS .VXML

Below the table, there is a 'Select File' dropdown menu set to 'Default Transfer'. A bar chart titled 'Default Transfer' shows data for months Jan through Jun. At the bottom right, there is a 'View Complete Details' button.

Step 3. Select the file from drop down bar > select the object tag from "Select Object tag" to analyze it's summary.

The screenshot shows the 'Select Object Tag' dropdown menu in the CX Point interface. The 'Queue' option is selected, indicated by a checkmark. The dropdown menu lists the following options: Select, Users, Divisions, Roles, and Queue.

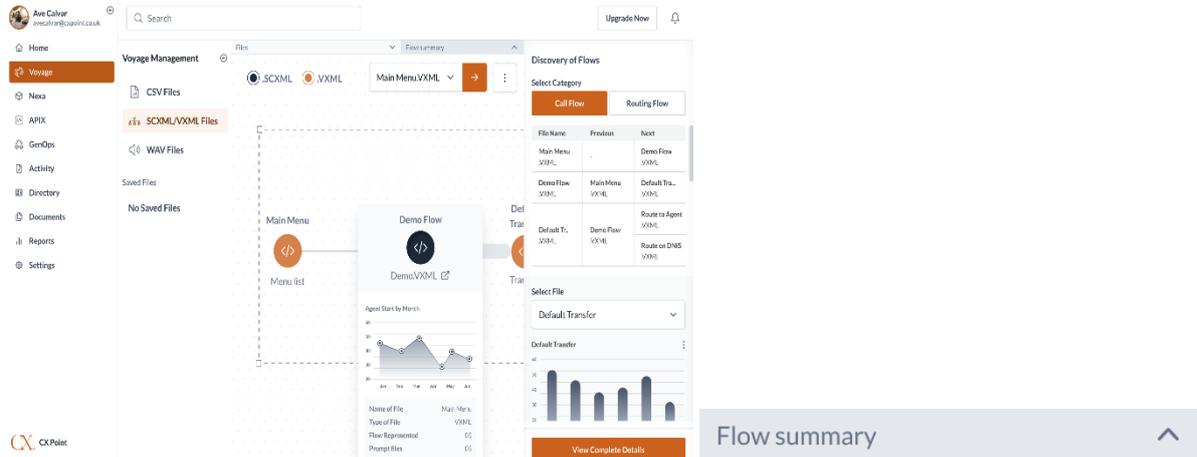
Step 4. Click on “View Complete details” to get the Summary of selected Object tag file.



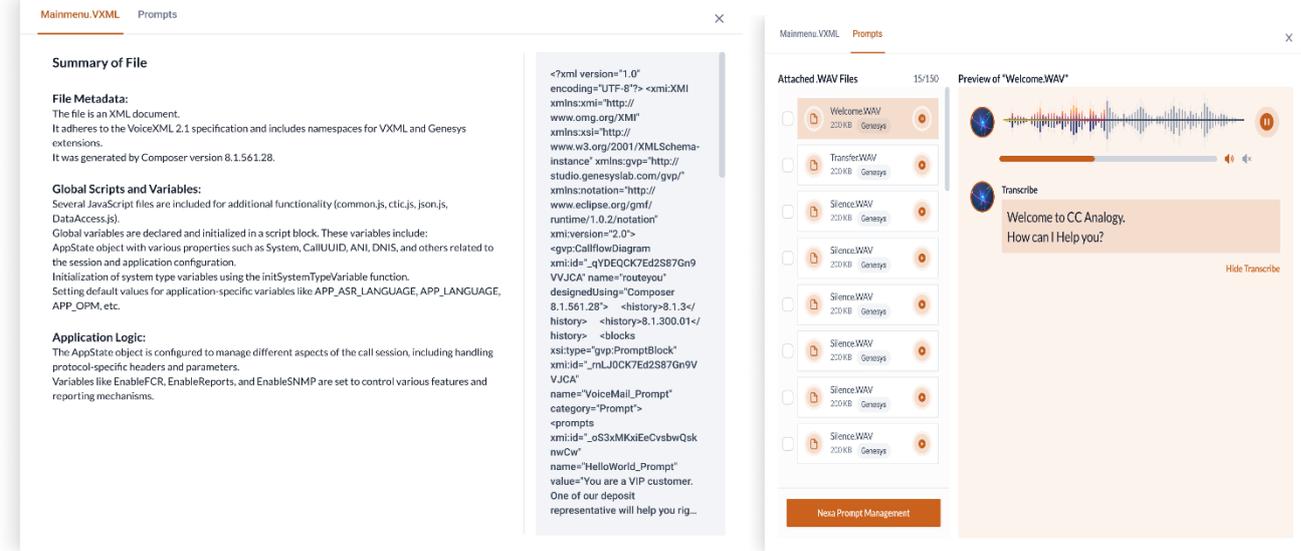
[To go back to list of questions click here](#)

3. Prompts & Transcribe (file meta data, application logic, scripts & variables)

Step 1. Select the file from workspace > click on the “Flow Summary” to view (Meta data ,etc.)



Step 2. Can view summary of file selected > to view Prompts click on option "Prompts".

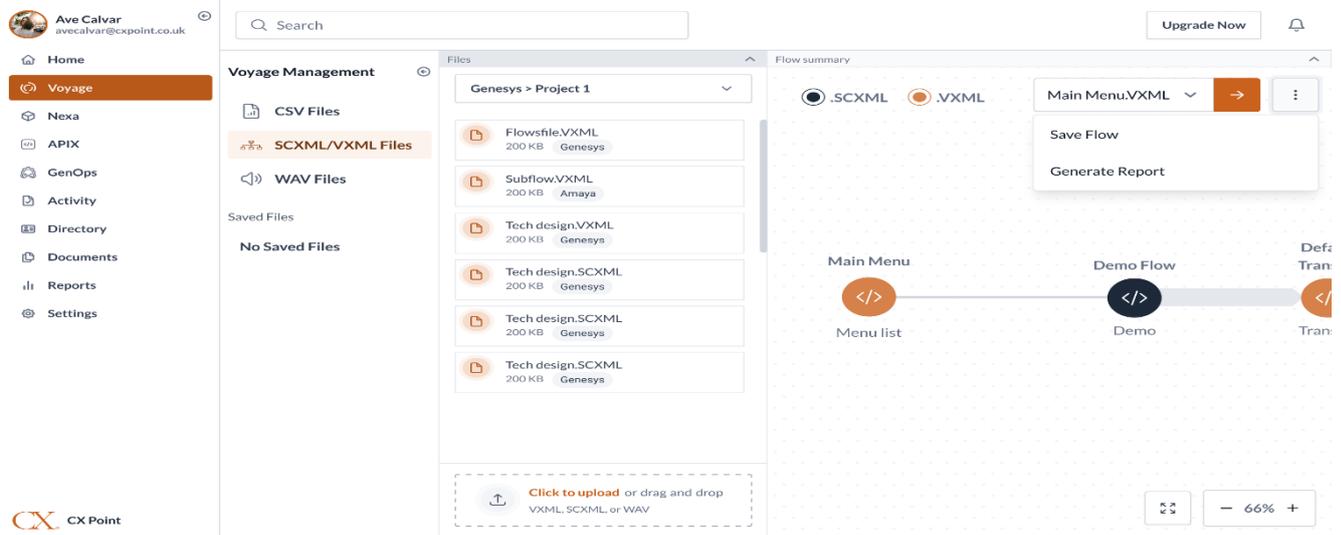


[To go back to list of questions click here](#)

4. Save flow & generate report

Step 1. Goto Voyage management > select the flow category under "voyage management".

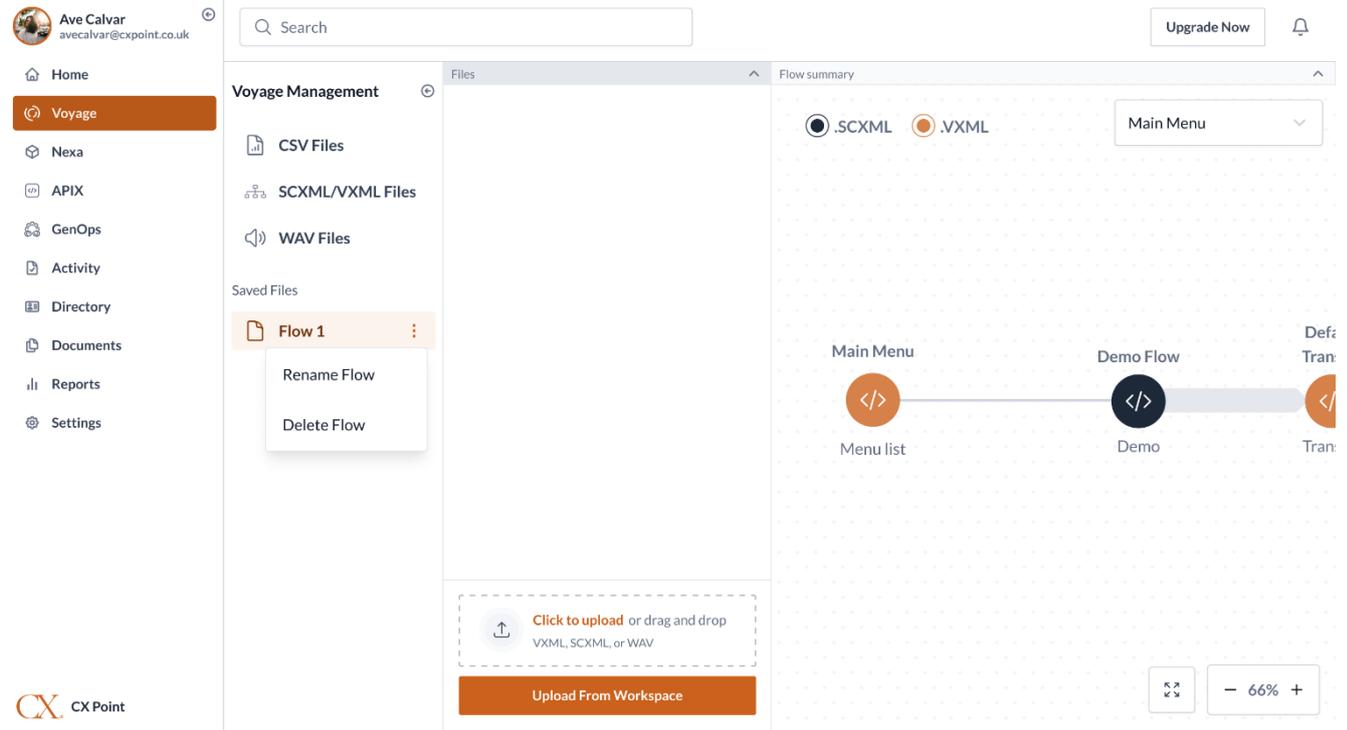
Step 2. Select the flow > and click on "Save flow" or click on "generate report" to view report.



Step3. User can also rename the while saving it in files.



Step 4. User can delete the saved flow by selecting the “Delete flow”.



[To go back to list of questions click here](#)

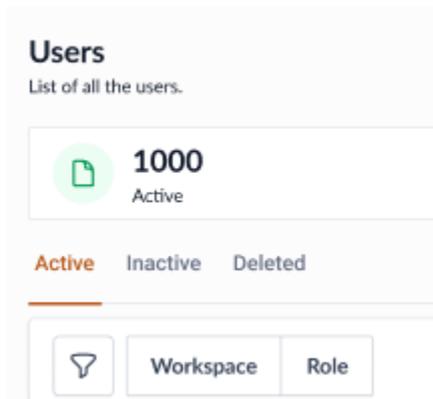
Nexa User

User Object

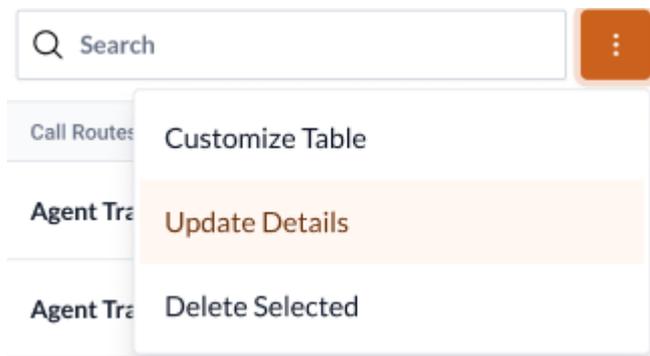
1. How to active and update users?

Step 1. Go to Nexa > People & Person > Users

Step 2. Click on Active to see all the active users.



Step 3. Click on 3 dots beside search bar as shown below.



Step 4. Select Update Details.

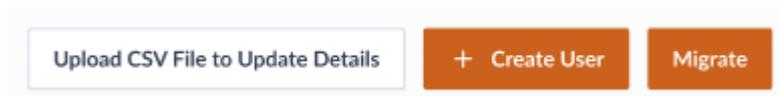
Step 5. Update the details and save.

[To go back to list of questions click here](#)

2. How to create users?

Step 1. Go to Nexa > People & Person > Users

Step 2. Click on +Create User button on top right corner.



Step 3. Upload file to create users.

Step 4. Click on upload or drag and drop or Click on Load from Workspace button.

Step 5. Select file from your device or Select Workspace and click on Open button.

Step 6. Select Project and click on Open button.

Step 7. Select File and click on Submit.

Step 8. Now you can preview the file.

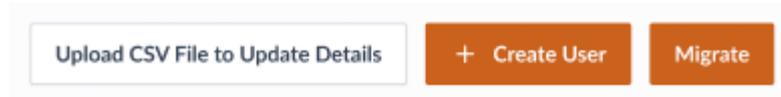
Step 9. Click on submit to create.

[To go back to list of questions click here](#)

3. [How to update users via CSV file?](#)

Step 1. Go to Nexa > People & Person > Users

Step 2. Click on Upload CSV File to Update Details.



Step 3. Upload CSV file to update user details.

Step 4. Click on upload or drag and drop.

Step 5. Locate and select the file you wish to upload, then click Submit.

Step 6. Now you can preview the file.

Step 7. Click on submit.

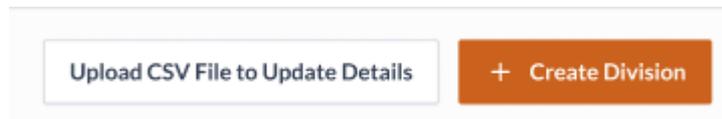
[To go back to list of questions click here](#)

Divisions object

1. [How to create division?](#)

Step 1. Go to Nexa > People & Person > Divisions

Step 2. Click on +Create Division button on top right corner.



Step 3. Upload file to create divisions.

Step 4. Click on upload or drag and drop or Click on Load from Workspace button.

Step 5. Select file from your device or Select Workspace and click on Open button.

Step 6. Select Project and click on Open button.

Step 7. Select File and click on Submit.

Step 8. Now you can preview the file.

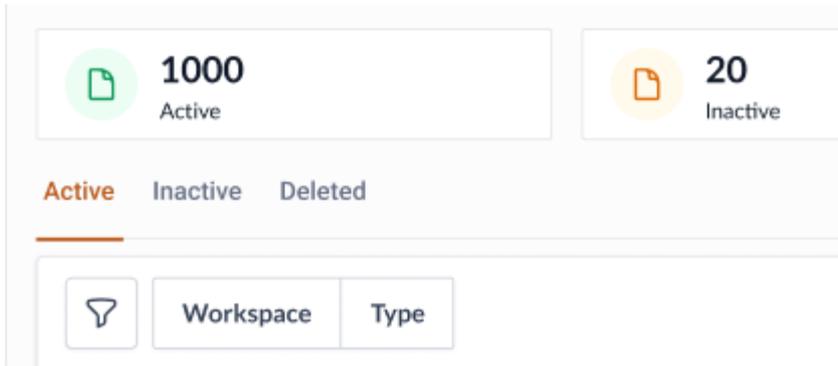
Step 9. Click on submit to create.

[To go back to list of questions click here](#)

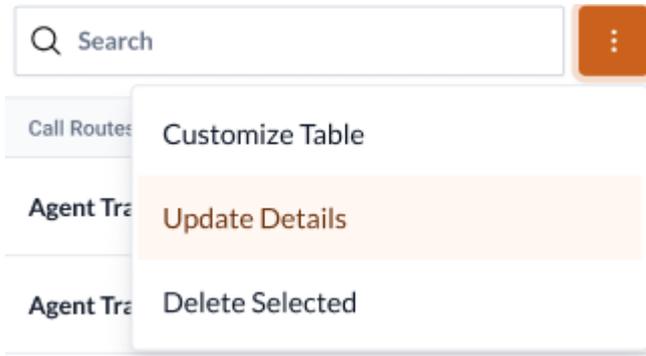
2. [How to active and update users?](#)

Step 1. Go to Nexa > People & Person > Divisions

Step 2. Click on Active to see all the active users.



Step 3. Click on 3 dots beside search bar as shown below.



Step 4. Select Update Details.

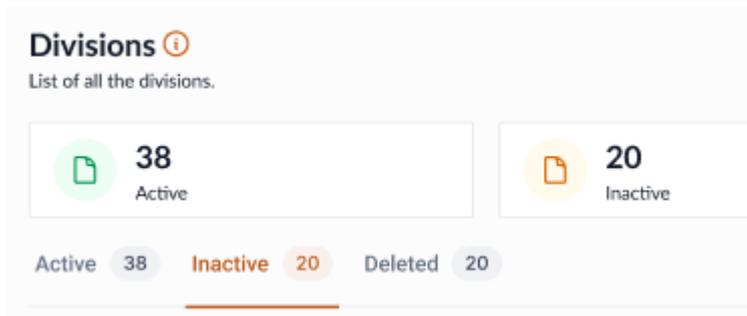
Step 5. Update the details and save.

[To go back to list of questions click here](#)

3. How to inactive and delete divisions?

Step 1. Go to Nexa > People & Person > Divisions

Step 2. Click on Inactive or Deleted to see all the specific details of divisions.



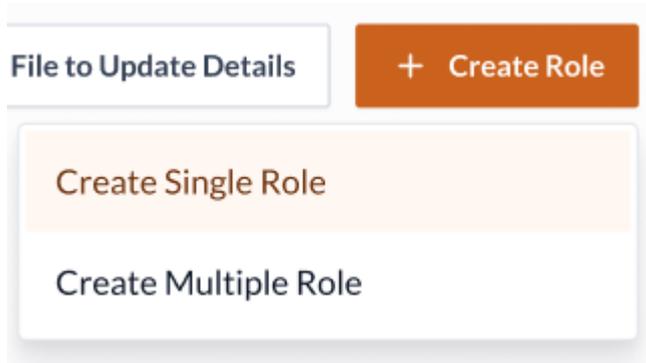
[To go back to list of questions click here](#)

Roles object

1. How to create single role?

Step 1. Go to Nexa > People & Person > Roles

Step 2. Click on +Create Role button on top right corner.



Step 3. Select Create Single Role.

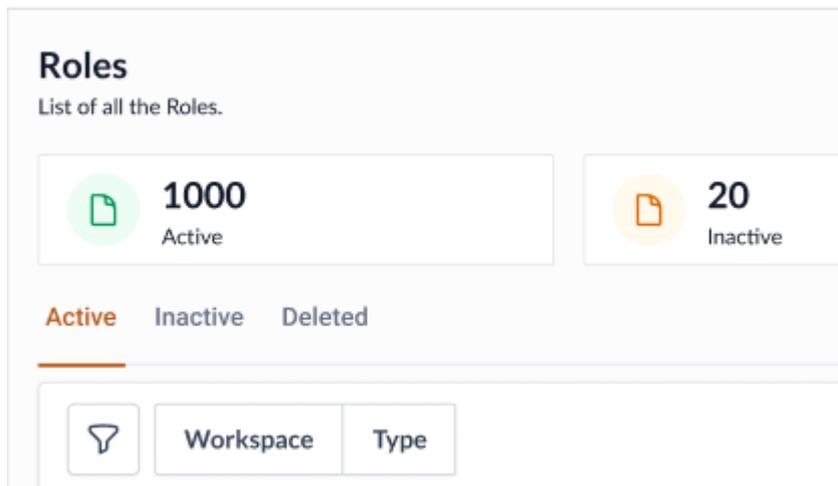
Step 4. Fill in the details and click on submit.

[To go back to list of questions click here](#)

2. How to inactive and delete role?

Step 1. Go to Nexa > People & Person > Roles

Step 2. Click on Inactive or Deleted to see all the specific details of the users.



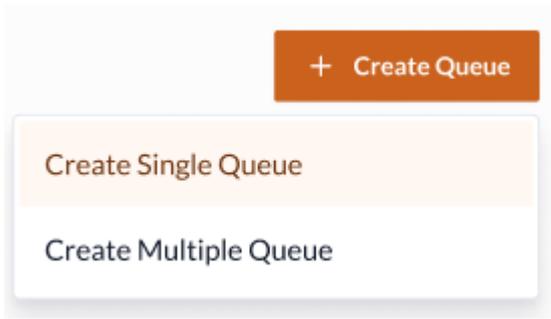
[To go back to list of questions click here](#)

Queue object

1. How to create single queue?

Step 1. Go to Nexa > Contact Center > Queue

Step 2. Click on +Create Queue button on top right corner.



Step 3. Select Create Single Queue.

Step 4. Fill in the details and click on submit.

[To go back to list of questions click here](#)

2. How to upload file to create queues from workspace?

Step 1. Go to Nexa > Contact Center> Queue

Step 2. Click on Workspace

Step 3. Upload file to create Queue.

Step 4. Click on Load from Workspace button.

Step 5. Select Workspace and click on Open button.

Step 6. Select Project and click on Open button.

Step 7. Select File and click on Submit.

Step 8. Now you can preview the file.

Step 9. Click on submit to create.

[To go back to list of questions click here](#)

Skills object

1. How to create skill?

Step 1. Go to Nexa > Contact Center> Skills

Step 2. Click on Workspace

Step 3. Upload file to create Skills.

Step 4. Click on upload or drag and drop or Click on Load from Workspace button.

Step 5. Select file from your device or Select Workspace and click on Open button.

Step 6. Select Project and click on Open button.

Step 7. Select File and click on Submit.

Step 8. Now you can preview the file.

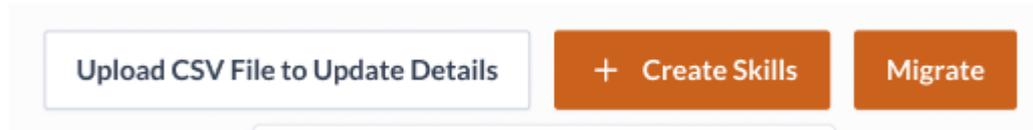
Step 9. Click on submit to create.

[To go back to list of questions click here](#)

2. How to migrate skills?

Step 1. Go to Nexa > Contact Center> Skills

Step 2. Click on Migrate button on top right corner.



Step 3. Upload file for migration.

Step 4. Click on upload or drag and drop.

Step 5. Locate and select the file you wish to migrate, then click Open.

Step 6. Select Workspace and then select file.

Step 7. Click on Migrate button on bottom right corner.

Step 8. Once the file is migrated you can preview the migrated file and create users.

[To go back to list of questions click here](#)

Call Routing object

1. How to upload file to create call routing from workspace?

Step 1. Go to Nexa > Routing > Call Routing

Step 2. Click on Workspace

Step 3. Upload file to create Call Routing.

Step 4. Click on Load from Workspace button.

Step 5. Select Workspace and click on Open button.

Step 6. Select Project and click on Open button.

Step 7. Select File and click on Submit.

Step 8. Now you can preview the file.

Step 9. Click on submit to create.

[To go back to list of questions click here](#)

Emergency Groups object

1. *How to create single emergency group?*

Step 1. Go to Nexa > Routing > Emergency Groups

Step 2. Click on +Create Emergency Groups button on top right corner.



Step 3. Select Create Single Emergency Group.

Step 4. Fill in the details and click on submit.

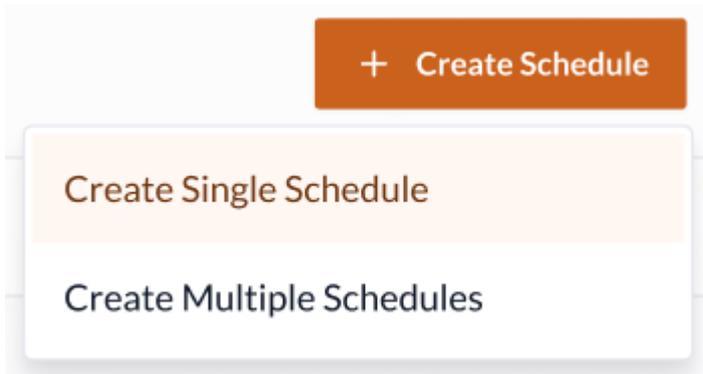
[To go back to list of questions click here](#)

Scheduling object

1. *How to create single schedule?*

Step 1. Go to Nexa > Routing > Scheduling

Step 2. Click on +Create Schedule button on top right corner.



Step 3. Select Create Single Schedule.

Step 4. Fill in the details and click on submit.

[To go back to list of questions click here](#)

2. *How to upload file to create scheduling from workspace?*

Step 1. Go to Nexa > Routing > Scheduling

Step 2. Click on Workspace

Step 3. Upload file to create Scheduling.

Step 4. Click on Load from Workspace button.

Step 5. Select Workspace and click on Open button.

Step 6. Select Project and click on Open button.

Step 7. Select File and click on Submit.

Step 8. Now you can preview the file.

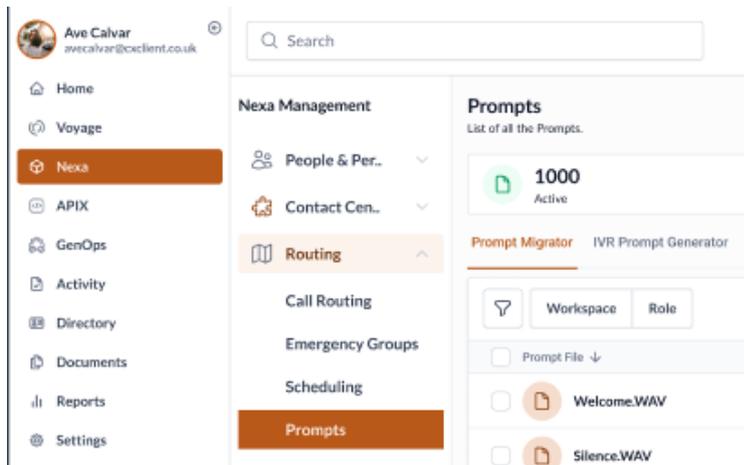
Step 9. Click on submit to create.

[To go back to list of questions click here](#)

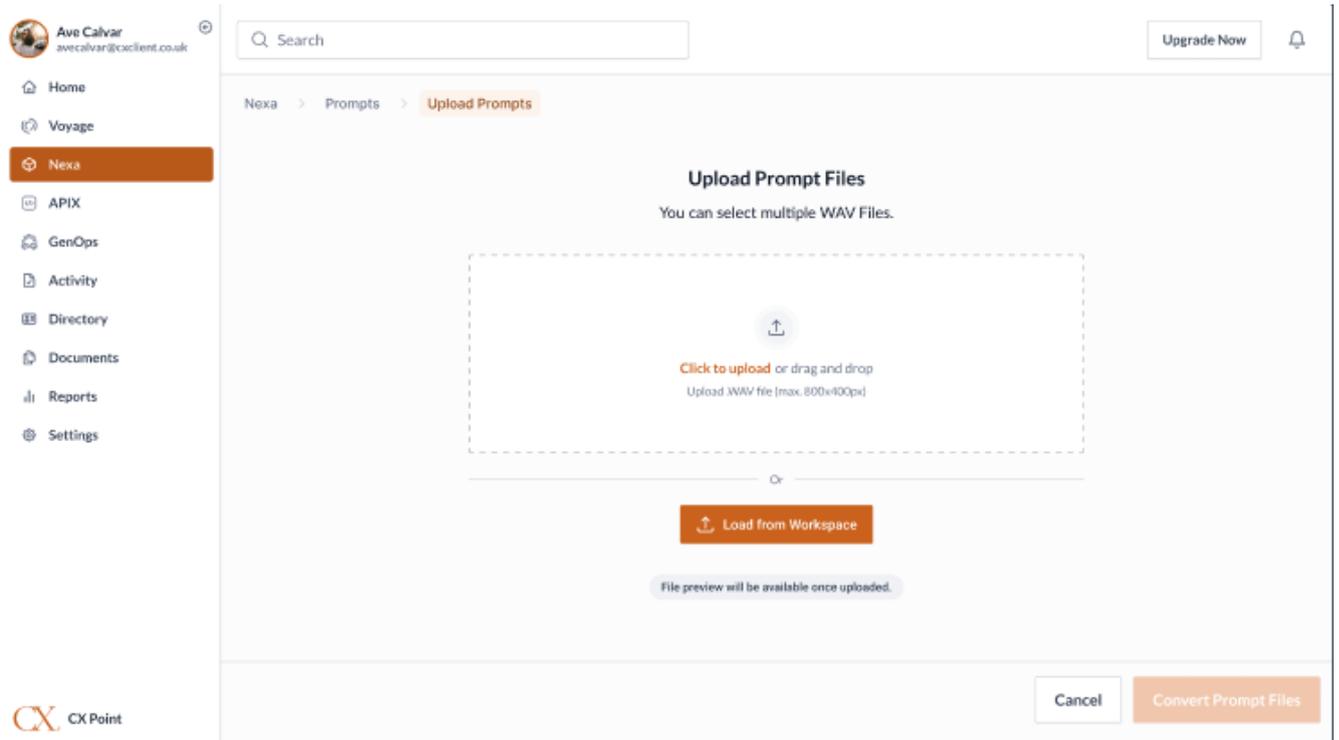
Prompts object

1. How to use prompt converter?

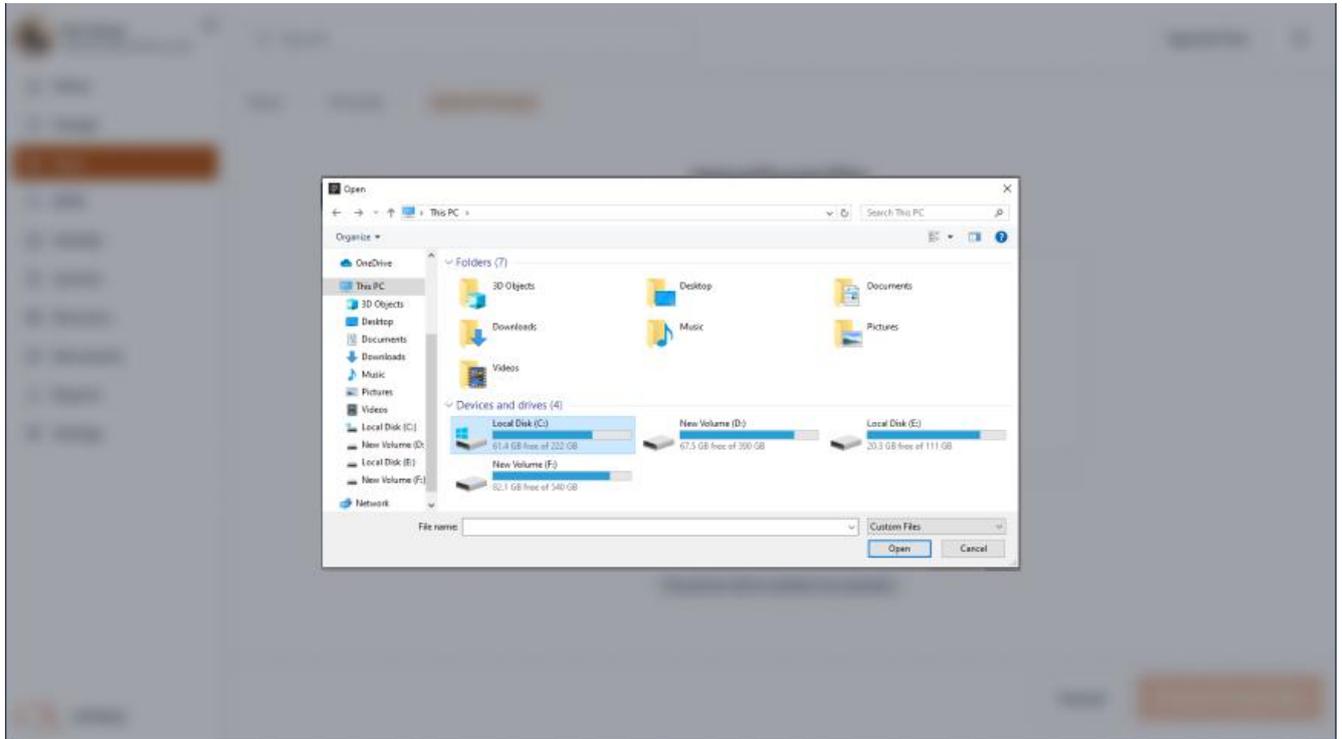
Step 1. Go to Nexa > Routing > Prompts > Prompt Migrator



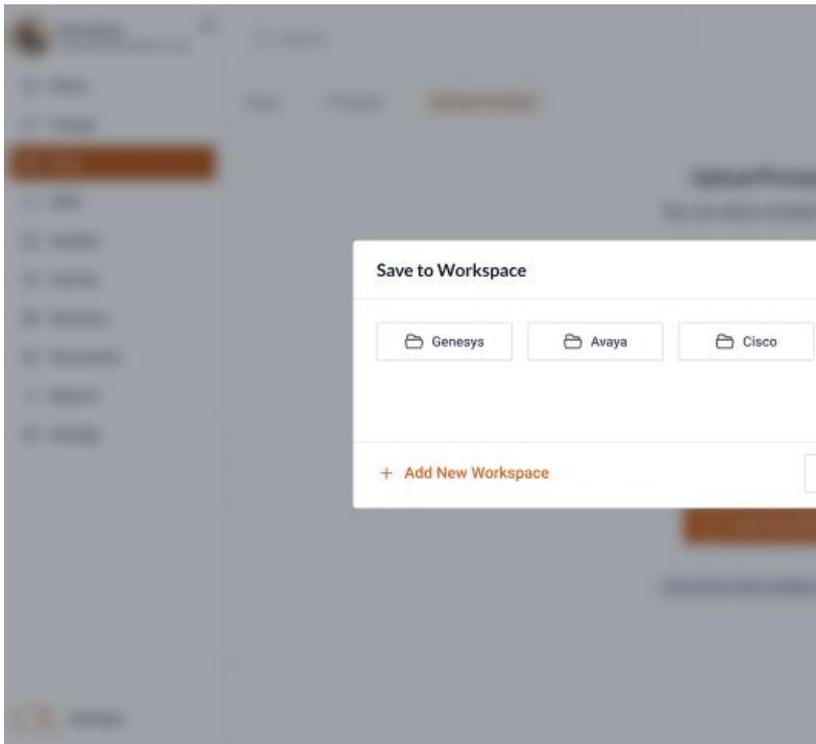
Step 2. Select the prompt that you want to edit or update



Step 3. Go to/ Select the prompt that you want to edit or update



Step 4. Select the prompt that you want to edit or update



Step 5. Go to/ Select the prompt that you want to edit or update

Step 6. Select the prompt that you want to edit or update

Step 7. Go to/ Select the prompt that you want to edit or update

Step 8. Select the prompt that you want to edit or update

[To go back to list of questions click here](#)

2. How to edit prompt?

Step 1. Go to Nexa > Routing > Prompts > Prompt Migrator

Step 2. Select the prompt that you want to edit or update

The screenshot displays the 'Prompts' management interface in the CX Point application. On the left, a sidebar contains navigation links for Home, Voyage, Nexa (highlighted), APIX, GenOps, Activity, Directory, Documents, Reports, and Settings. The main area features a search bar, an 'Upgrade Now' button, and two action buttons: 'Prompt Converter' and 'IVR Prompt Generator'. Below these, summary cards show 1000 Active prompts, 250 Inactive prompts, and 250 Deleted prompts. The 'Prompts' section is divided into 'Prompt Migrator' and 'IVR Prompt Generator' tabs. A table lists prompts with columns for 'Prompt File', 'Transcription', 'Workspace Tag', and 'Status'. The table contains 10 rows of data, including 'Welcome.WAV' with transcription 'Welcome to CX Point. How can I help you?' and 'Audio.WAV' with transcription 'Lorem ipsum dolor sit amet consectetur.' The status column shows various states like 'Active_Migra', 'Active', and 'Active_Migra'. A footer indicates 'Showing 10 of 1500 entries' and includes pagination controls.

Step 3. Update Prompts

Attached .WAV Files 15/150

- Welcome.WAV 200 KB Genesys
- Transfer.WAV 200 KB Genesys
- Silence.WAV 200 KB Genesys
- Silence.WAV 200 KB Genesys
- Silence.WAV 200 KB Genesys

Preview of "Welcome.WAV"

File Name: Welcome.WAV

Prompt: Welcome to CC Analogy. How can I Help you?

Word Count	Language
10	English
Gender	Artist
Female	Healthcare

AI Suggestions

- Can you please provide your account number or username so I can look into your issue?*
- Can you please provide your account number or username so I can look into your issue?*
- Can you please provide your account number or username so I can look into your issue?*
- Can you please provide your account number or username so I can look into your issue?*

[To go back to list of questions click here](#)

3. How to use IVR prompt generator?

Step 1. Go to Nexa > Routing > Prompts > IVR Prompt Generator

Step 2. Fill Details and click on submit

IVR Prompt Generator

Please update following information

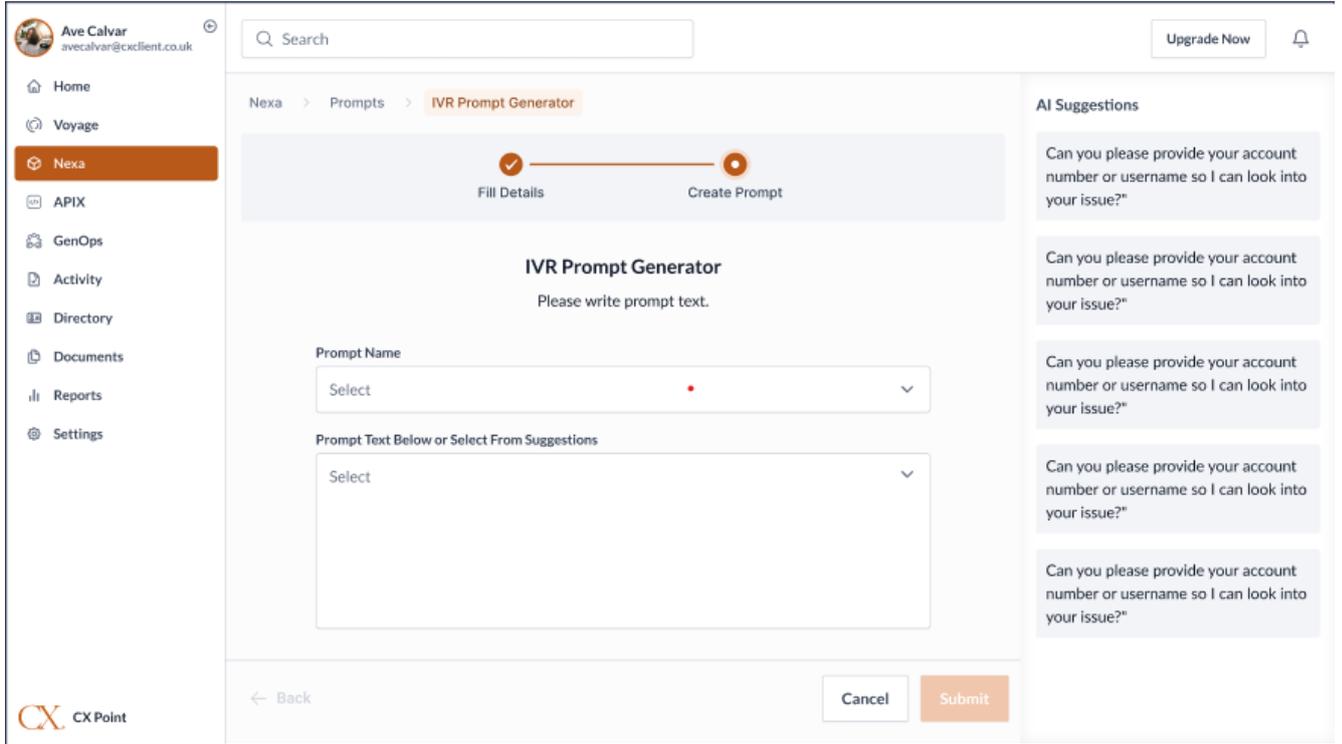
Purpose:

Word Count: Language:

Gender: Artist:

← Back Cancel Submit

Step 3. Then you'll move toward choose prompt. Write prompt name and text and click on submit.



Your prompt is created.

[To go back to list of questions click here](#)