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.
 <u>To go back to list of questions click here</u>

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.

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| CX. | | |
|--------------------------------|------------------|----------------------|
| Welcome Back! | | |
| Please log in to continue | | |
| Email olivia@trippmatch.com | | Your trusted growth |
| Password | Show | Contact Center |
| Remember me | Forgot Password? | Automation solutions |
| Logi | n: | What's New |
| Login with Single | Sign-On (SSO) | |
| ABC Industries Change Organis | ation | |

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.



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What's New

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

Login with Single Sign-On (SSO)

e Organisation

Forgot Password?

Remember me

ABC Industries Cha

EMEA (Frankfurt) Change



Step 3. Select Region and click on submit. <u>To go back to list of questions click here</u>

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? |
| Logi | in |
| | |
| Login with Single | Sign-On (SSO) |
| Login with Single ABC Industries Change Organis | Sign-On (SSO) |

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.

| Ave Calvar avecalvar@cxpoint.co.uk | Q Search | | | Upgrade Now | Û |
|---------------------------------------|-------------------|----------------------------|--------|---------------------------|-----|
| ☆ Home | Manage Management | Files | ^ | Flow summary | ~ |
| (c) Voyage | voyage Management | Select Project | ~ | Select Main Flow File ✓ → | ; |
| ⊗ Nexa | CSV Files | | | | |
| O APIX | SCXML/VXML Files | | | Save Flow | |
| 🖏 GenOps | (1) WAV Files | | | Generate Report | |
| Activity | S | | | | |
| Directory | Saved Files | | | | |
| D Documents | No Saved Files | | | | |
| di Reports | | | | | |
| B Sotting | | | | | |
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| | | Click to upload or drag an | d drop | | |
| CN7 | | VXML, SCXML, or WAV | | | % + |
| CX Point | | | | | |
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Step2. Go to Files Section & Click on "Click to Upload" option.

| Select Pro | oject | \sim |
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| | Click to upload or drag and dro | i q |
| | VAML, SCAML, OF WAV | |

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

| ☐ Open ← → × ↑ ■ → This PC > | | × Search This PC P | |
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| ↓ Downleads Music E Pictures Wideos Videos Videos | | | |
| Local Disk (C) New Volume (D: Local Disk (E) New Volume (F) New Volume (F) New Volume (F) | New Volume (Dr.) 57.5 GB free of 390 GB | Local Dick (Et) | |
| File name | | Custom Files V Open Cancel | |
| | | | |

Step 4. Select the Workspace or can create new workspace by clicking 'Add new workspace" in which you wish



store the selected file.

| - | Save to Workspace | | × | |
|---|--------------------|-------------|---------------|--|
| - | | | | |
| - | Genesys > Projects | 2 Project 3 | Project 4 | |
| | | | | |
| | | | | |
| | + Add New Project | | Cancel Submit | |
| | | | | |

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.

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





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

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.)

To go back to list of questions click here

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.

| Rename Flow | | × |
|-------------|--------|------|
| Flow name | | |
| Flow 1 | | |
| | | |
| | Cancel | Save |

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

| | Ave Calvar avecalvar@cxpoint.co.uk | | ၃ Search | | | | | | Upgrade Now | Û |
|---------------|---------------------------------------|-------------------|----------------|-----|----------------------------------|---|--------------|-------------|----------------|------|
| ۵ | Home | Vovage Management | | e | Files | ^ | Flow summary | | | ^ |
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| Ø | Nexa | 1 | CSV Files | | | | | | | |
| <۵ | APIX | <u>.</u> | SCXML/VXML Fi | les | | | | | | |
| â | GenOps | | WAV Files | | | | | | | |
| ٩ | Activity | Saveo | d Files | | | | | | | |
| 00 | Directory | ß | Flow 1 | : | | | | | | Defa |
| ¢ | Documents | | Rename Flow | | | | Main Menu | Demo Fl | ow | Tran |
| ill m | Reports | | | | | | | <pre></pre> | | </td |
| 101 | Settings | | Delete Flow | | | | Menulist | Demo | , | Tran |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | Click to upload or drag and drop | | | | | |
| \mathcal{O} | CX Point | | | | Upload From Workspace | | | | ка с м — 66 | ;% + |

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.

| Users List of all the users. | | | |
|---------------------------------|----------------|------|--|
| ٥ | 1000 Active | | |
| Active | Inactive Delet | ted | |
| 8 | Workspace | Role | |

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

| Q Search | : | |
|-------------|-----------------|--|
| Call Routes | Customize Table | |
| Agent Tra | Update Details | |
| Agent Tra | Delete Selected | |

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.



Divisions object

How to create division?
 Step 1. Go to Nexa > People & Person > Divisions

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

Upload CSV File to Update Details + Create Division

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.

| 1000 Active | D 20 Inactive |
|-------------------------|------------------|
| Active Inactive Deleted | |
| Workspace Type | |

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

| Q Search | n 📑 |
|-------------|-----------------|
| Call Routes | Customize Table |
| Agent Tra | Update Details |
| Agent Tra | Delete Selected |

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.





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.

| File to Update Details | + Create Role |
|------------------------|---------------|
| Create Single Role | |
| Create Multiple Rol | e |
| | |

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.

| Roles List of all the Roles. | |
|---------------------------------|------------------|
| 1000 Active | D 20 Inactive |
| Active Inactive Deleted | |
| Workspace Type | |

To go back to list of questions click here

Queue object

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

 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.

| Upload CSV File to Update Details | + Create Skills | Migrate |
|--|---------------------------|---------|
| 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

 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.
<u>To go back to list of questions click here</u>

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.
<u>To go back to list of questions click here</u>

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Prompts object

1. How to use prompt converter? Step 1. Go to Nexa > Routing > Prompts > Prompt Migrator

| Ave Calvar exclient.co.uk | Q Search | |
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| 🛱 GenOps | 🗍 Routing 🔷 | Prompt Migrator IVR Prompt Generator |
| Activity | Call Routing | Verliseace Role |
| Directory | 5 5 | p Protrapace Role |
| Documents | Emergency Groups | Prompt File ψ |
| di Reports | Scheduling | Welcome.WAV |
| Settings | Prompts | Silence.WAV |

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

| ۲ | Ave Calvar © avecalvar@cxclient.co.uk | Q Search Upgrade Now Q |
|---------------|--|---|
| ŵ | Home | Nova > Promote > Holaad Promote |
| Ø | Voyage | |
| ଚ | Nexa | Unload Prompt Files |
| | APIX | You can select multiple WAV Files. |
| 6 | GenOps | |
| D | Activity | |
| | Directory | 1. |
| ø | Documents | Click to upload or drag and drop |
| di. | Reports | Upload XWW file (max. 800x400px) |
| ٥ | Settings | |
| | | Or |
| | | 1 Load from Workspace |
| | | File preview will be available once uploaded. |
| | | |
| | | Cancel Convert Promot Files |
| \mathcal{O} | CX Point | |

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

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

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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
<u>To go back to list of questions click here</u>

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

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|----|-------------------------|------------------|--------------------------------------|--|---------------|--------------|
| ŵ | Home | Nexa Management | Prompts | + Brown Committee | + IVB Promo | d Cenerator |
| Ø | Voyage | | List of all the Prompts. | + Prompt Convertor | + TVR Promp | Generator |
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| ଜ | GenOps | 🕅 Routing 🗠 | Prompt Migrator IVR Prompt Generator | | | |
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| | Directory | Emergency Groups | y rompore note | ~ | | |
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| | | | Showing 10 of 1500 entries | 1 2 3 8 9 10 | ← Previous | Next > |

CX.

Step 3. Update Prompts

| Ave Calvar avecalvan@cxclient.co.uk | Q Search | | Upgrade Now |
|---|--------------------------------|----------------------------------|--|
| G Home | Nexa > Prompts > Update Prompt | S | AI Suggestions |
| €# voyage | Attached WAV Files 15/150 | Preview of "Welcome WAV" | Community and the second second |
| ⊗ Nexa | | | number or username so I can look into |
| · APIX | Welcome.WAV 200 KB Genesys | 0 | your issue?" |
| 🕄 GenOps | TransforWAV | • · · · · · · · · · · · · | Con you place any ide your account |
| Activity | D 200 KB Genesys | | number or username so I can look into |
| Directory | B Silence.WAV | File Name | your issue: |
| Documents | 200 KB Genesys | weicome.www | Can you please provide your account |
| ili Reports | D Silence.WAV 0 | Prompt Welcome to CC Analogy. | number or username so I can look into your issue?* |
| Settings | Silence WAV | How can I Help you? | |
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| CX CX Point | | | |

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

| Ave Calvar avecalvar@cxclient.co.uk | Q Search | | | | | Upgrade Now | Û |
|--|----------------------------|--------------|--------------|---------------|---|-------------|--------|
| ᢙ Home | | | | | | | |
| () Voyage | Nexa > Prompts > IVR Promp | ot Generator | | | | | |
| 𝕹 Nexa | | Fill Details | | Create Brownt | | | |
| In APIX | | Fill Details | | Greate Prompt | | | |
| 🛱 GenOps | | | | | | | |
| Activity | | IVR P | ompt Gen | erator | | | |
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| CX CX Point | - Back | | | | | Cancel | Submit |

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

| Ave Calvar exclient.co.uk | Q Search | Upgrade Now |
|---|---|--|
| ය Home © Voyage | Nexa > Prompts > IVR Prompt Generator | AI Suggestions |
| Nexa APIX | Fill Details Create Prompt | Can you please provide your account number or username so I can look into your issue?" |
| GenOps Activity Directory | IVR Prompt Generator Please write prompt text. | Can you please provide your account number or username so I can look into your issue?" |
| Documents II Reports Sottings | Prompt Name Select | Can you please provide your account number or username so I can look into your issue?* |
| to vernigo | Prompt Text Below or Select From Suggestions Select | 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?" |
| CX CX Point | <a>← Back Cancel Submit | |

Your prompt is created.

To go back to list of questions click here