CXPOINT
CLIENT APPLICATION USER HELP GUIDE

Submitted by CXPoint

Version: 1.0

Release date: Feb 2025

TABLE OF CONTENT

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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

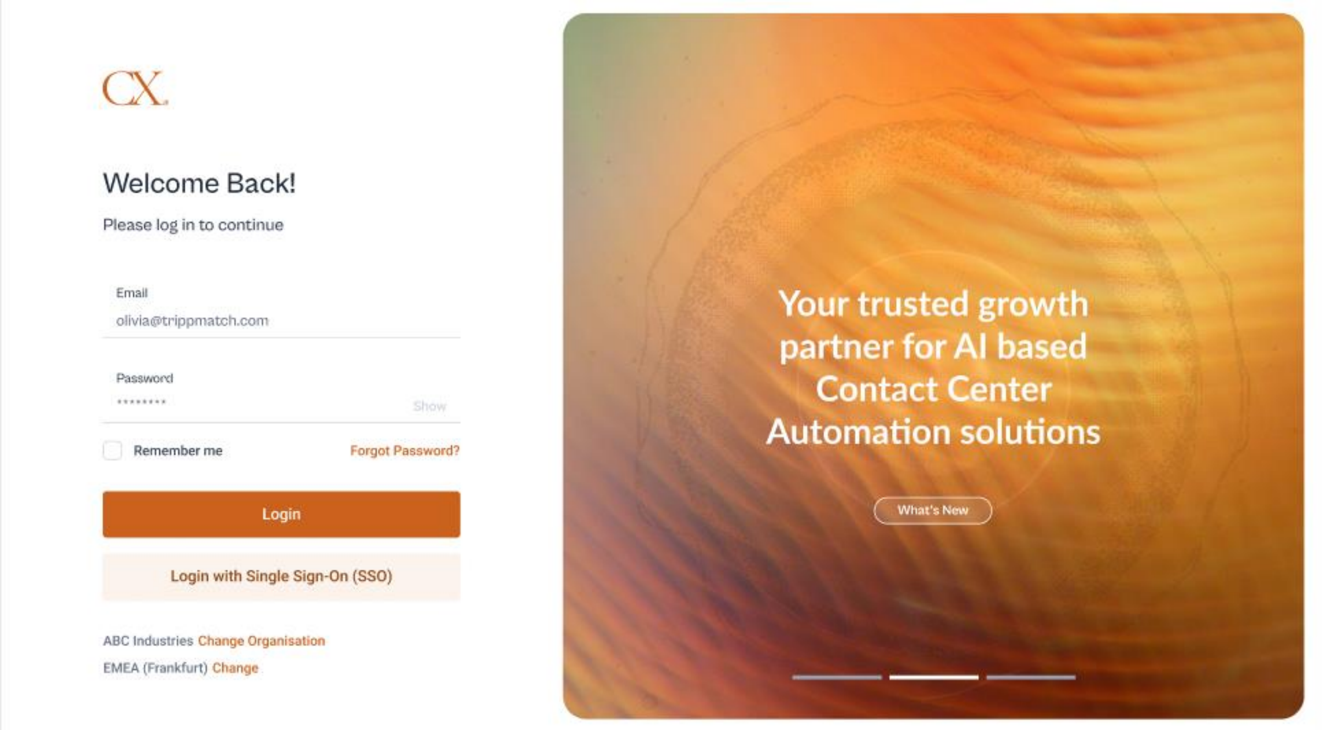
1.3 How Single Sign-on Works?

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?

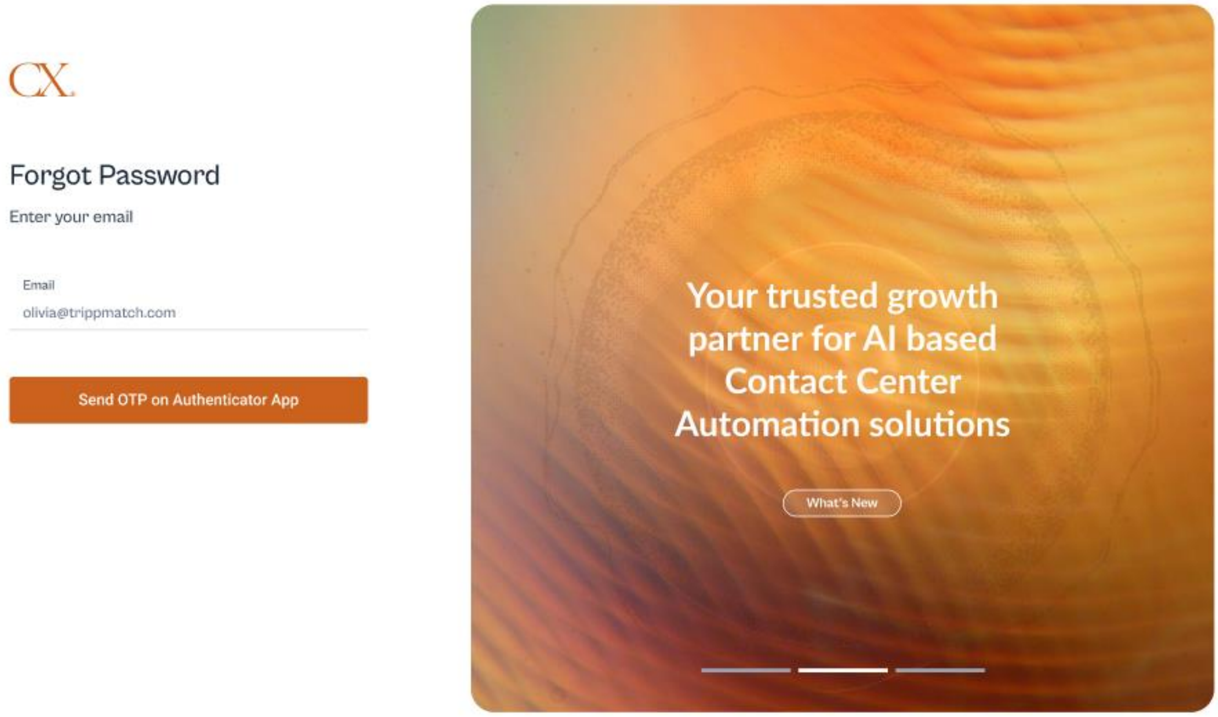
Step 1. Enter your email.

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.

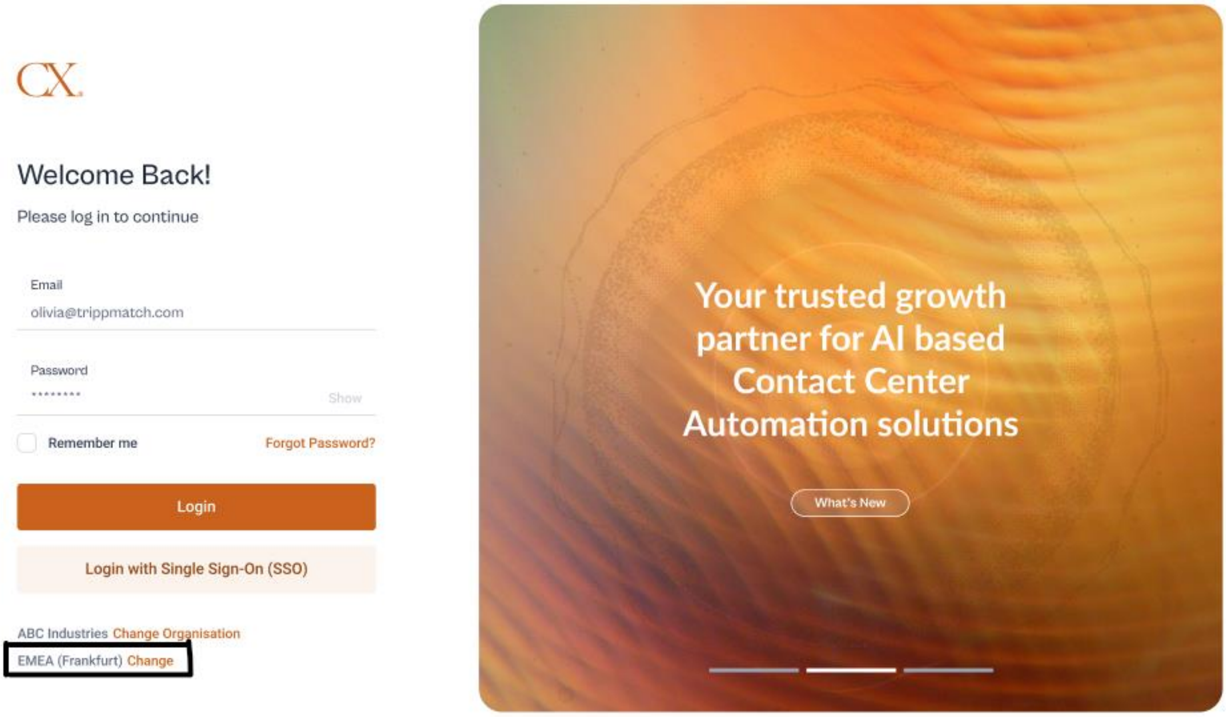


[To go back to list of questions click here]

1.5 How to change region?

Step 1. Go to login page.

Step 2. Click on Change Region.



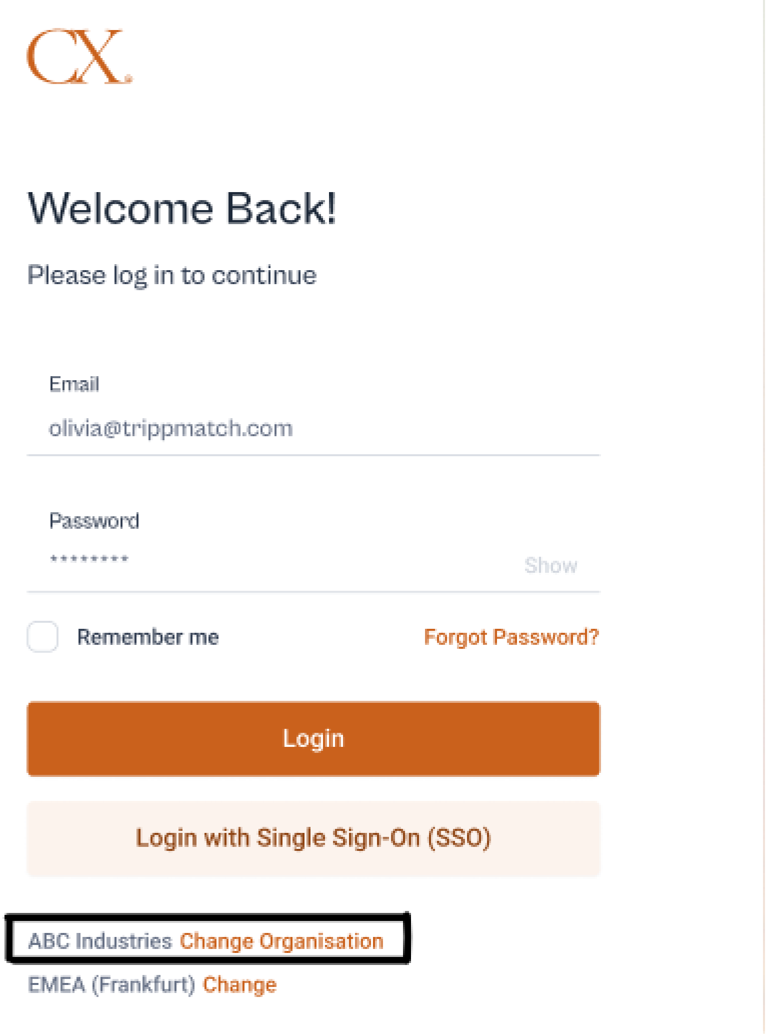
Step 3. Select Region and click on submit.

[*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.



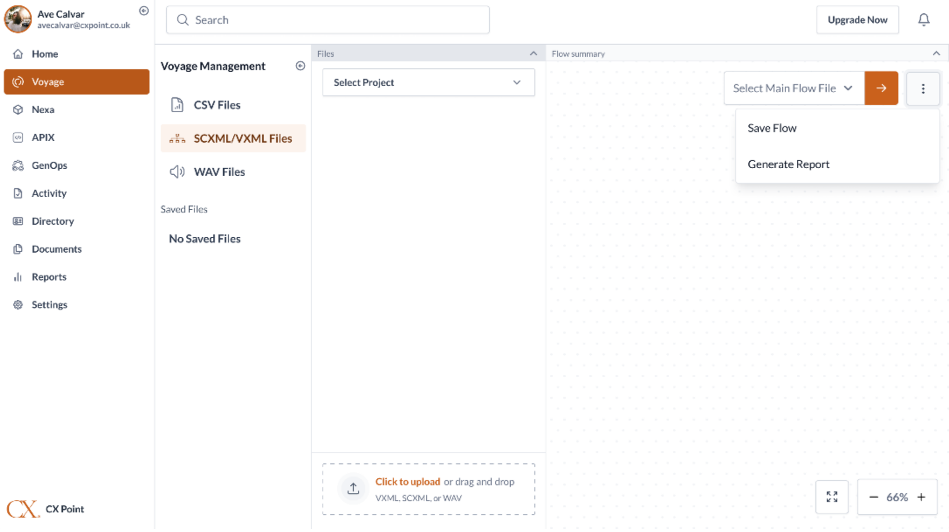
Step 3. Enter your organization name and select continue.

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

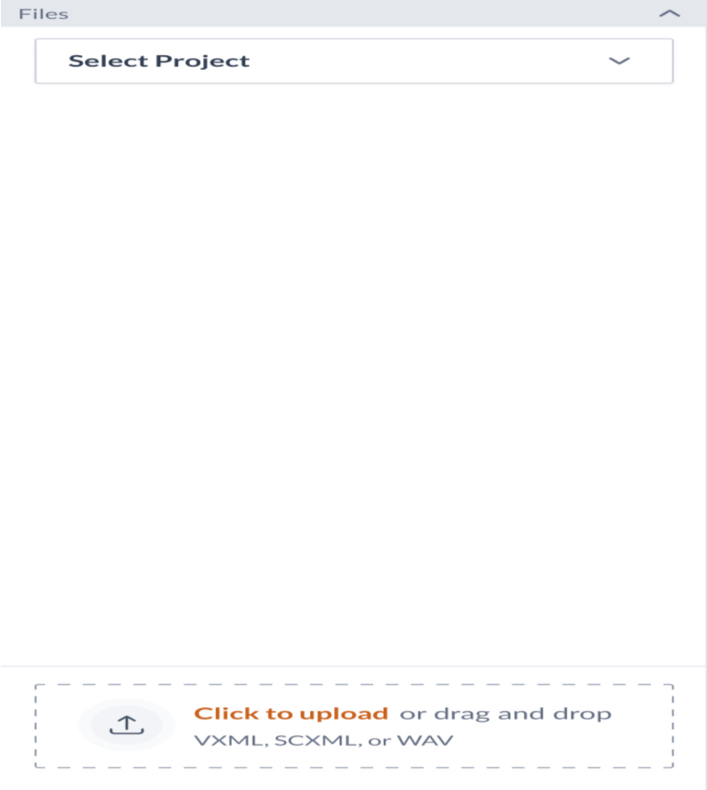
Voyage User

1. How to save to workspace in Voyage?

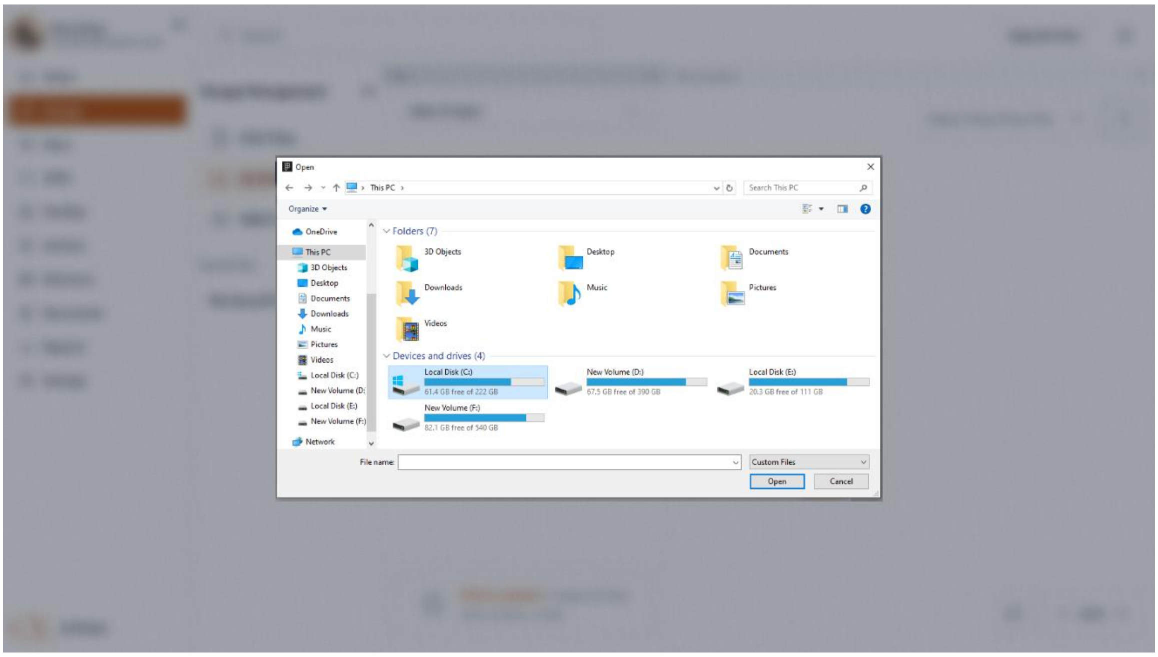
Step1. Go to Voyage page.



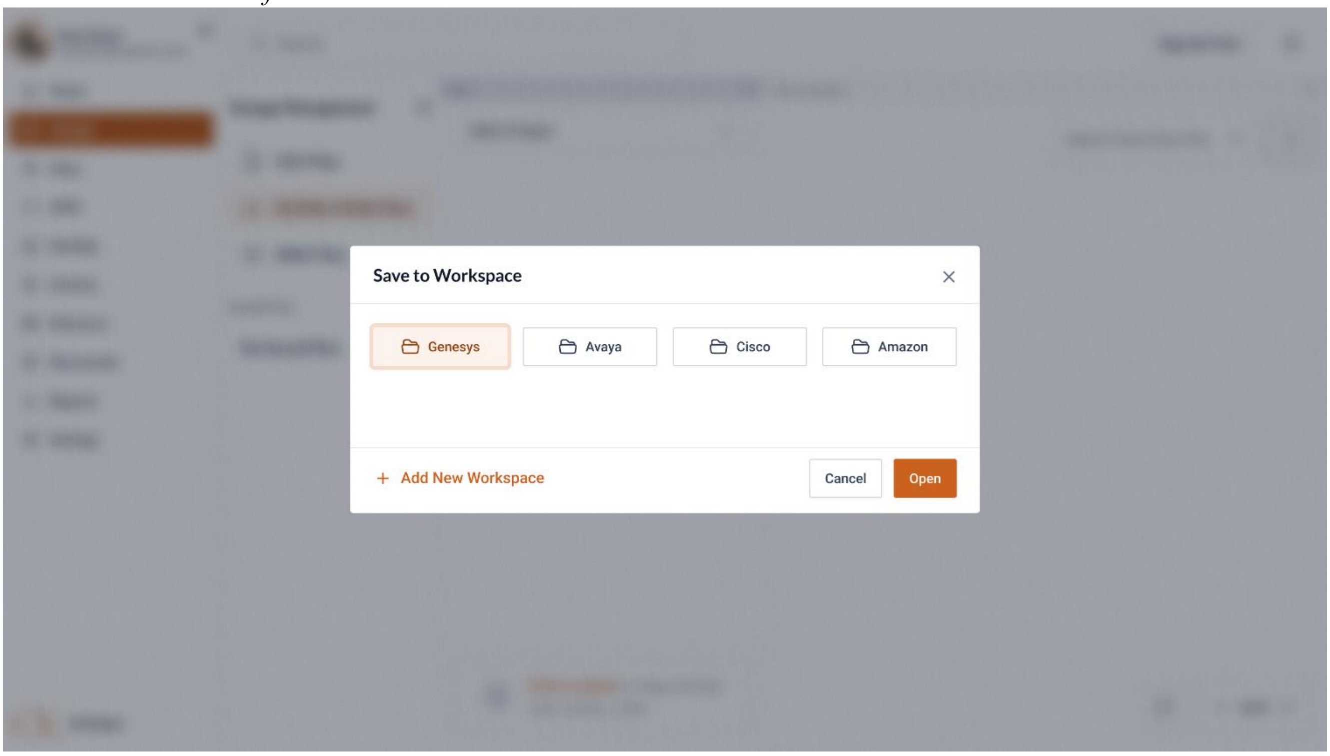
Step2. Go to Files Section & Click on "Click to Upload" option.



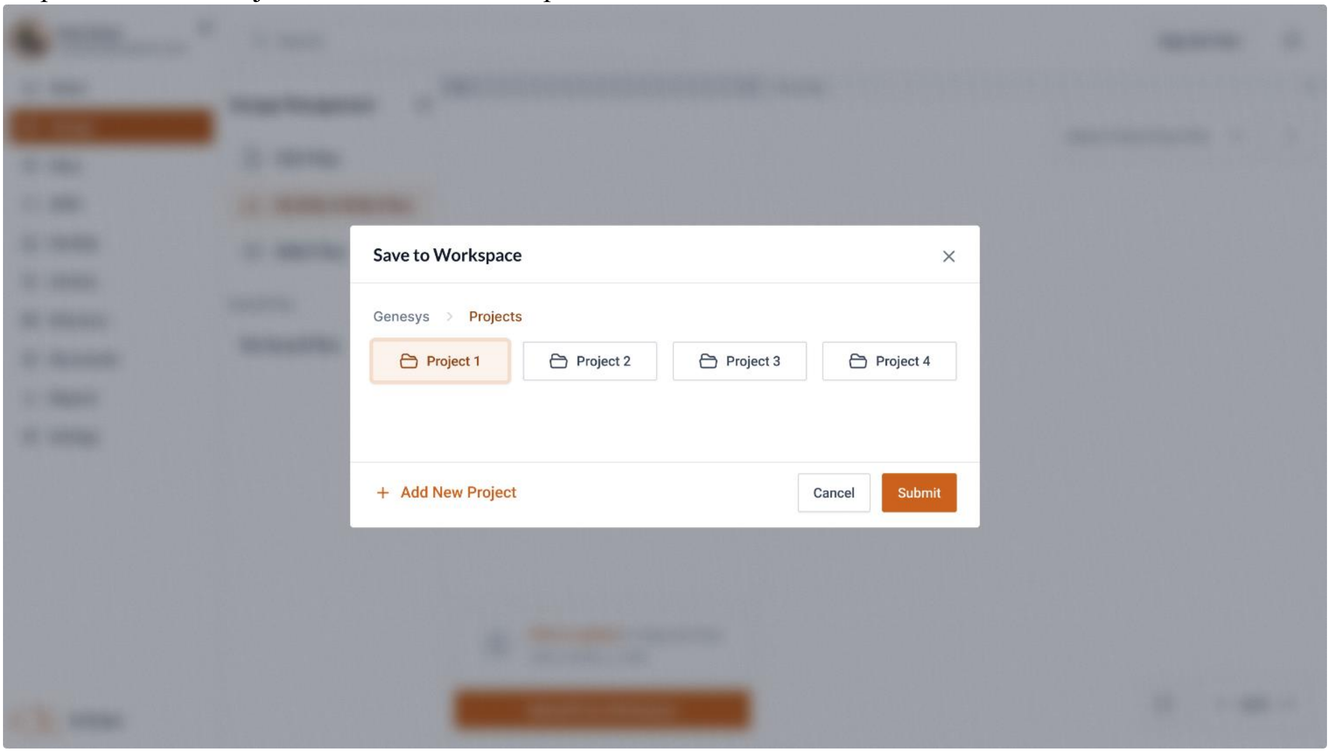
Step3. Select the File to be uploaded and click on ''Open".



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



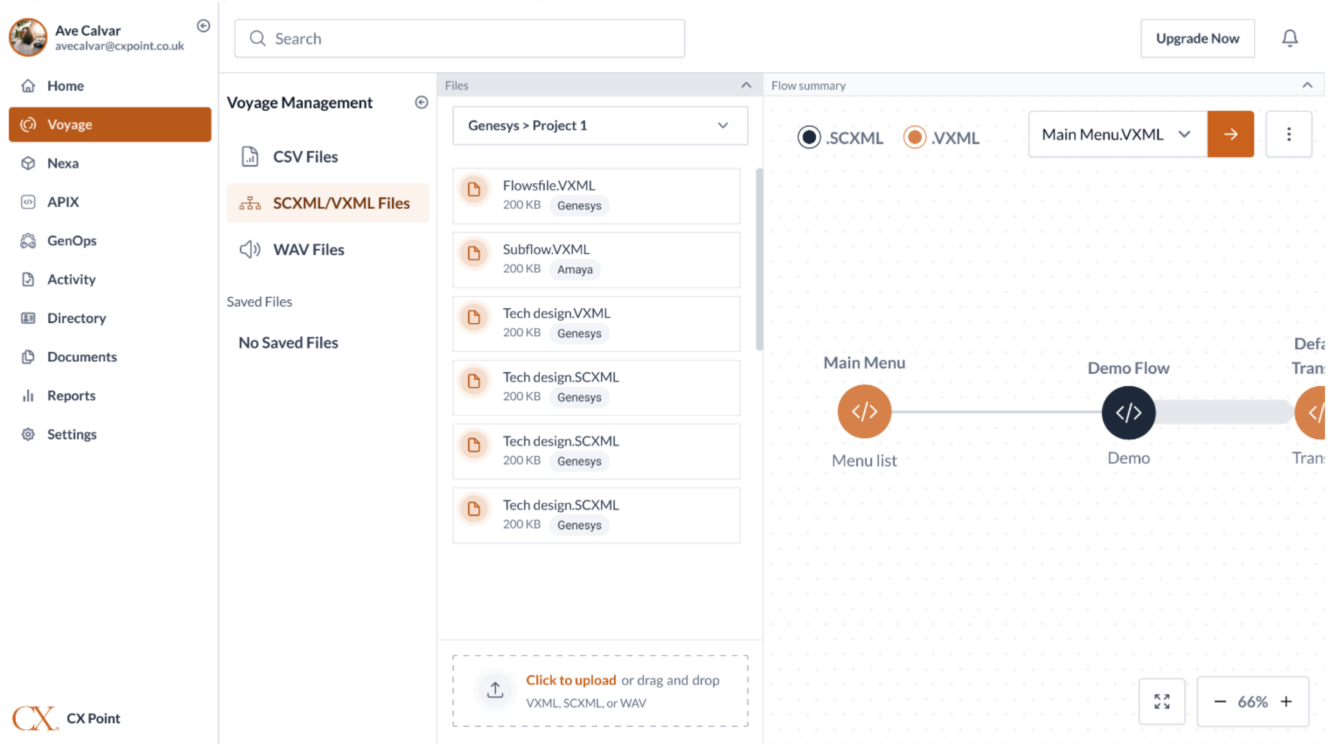
Step 5. Select the Project from selected workspace and click on ‘’Submit” to save the file.



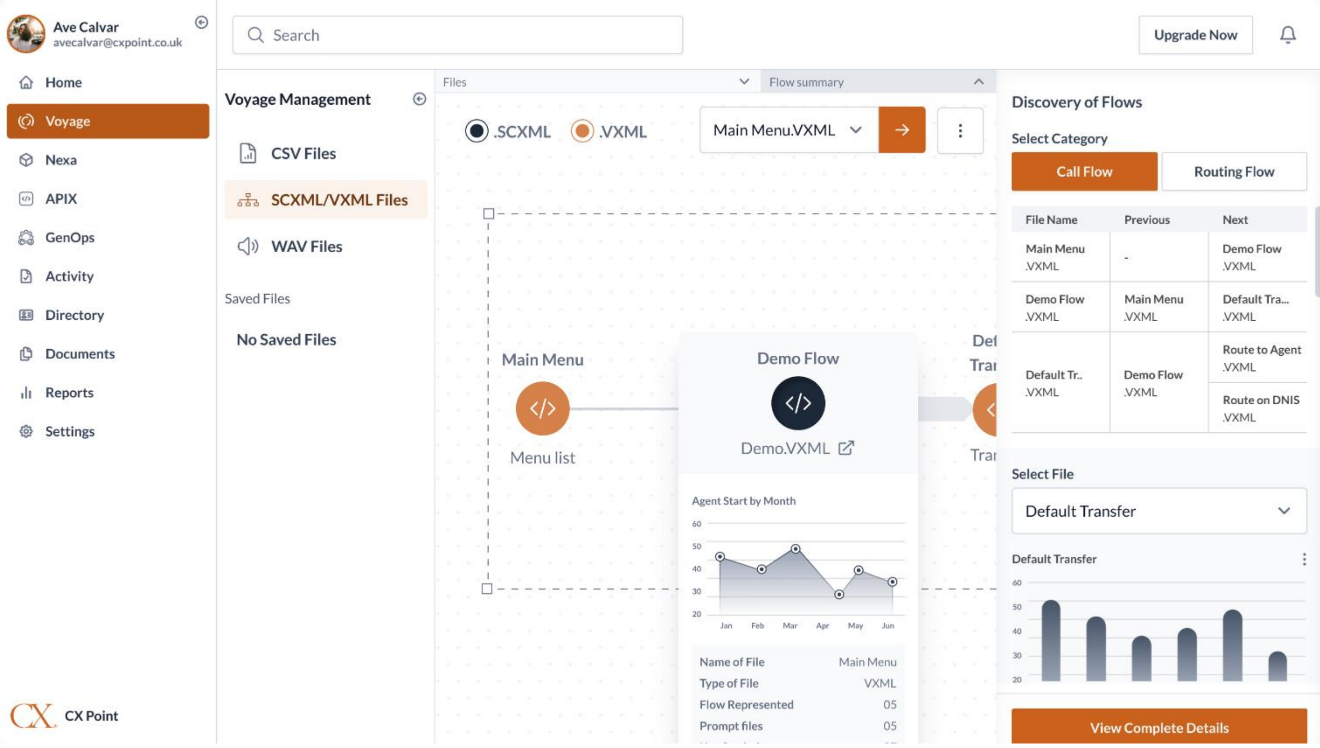
To go back to list of questions click here

2. Flow Summary & Flow discovery

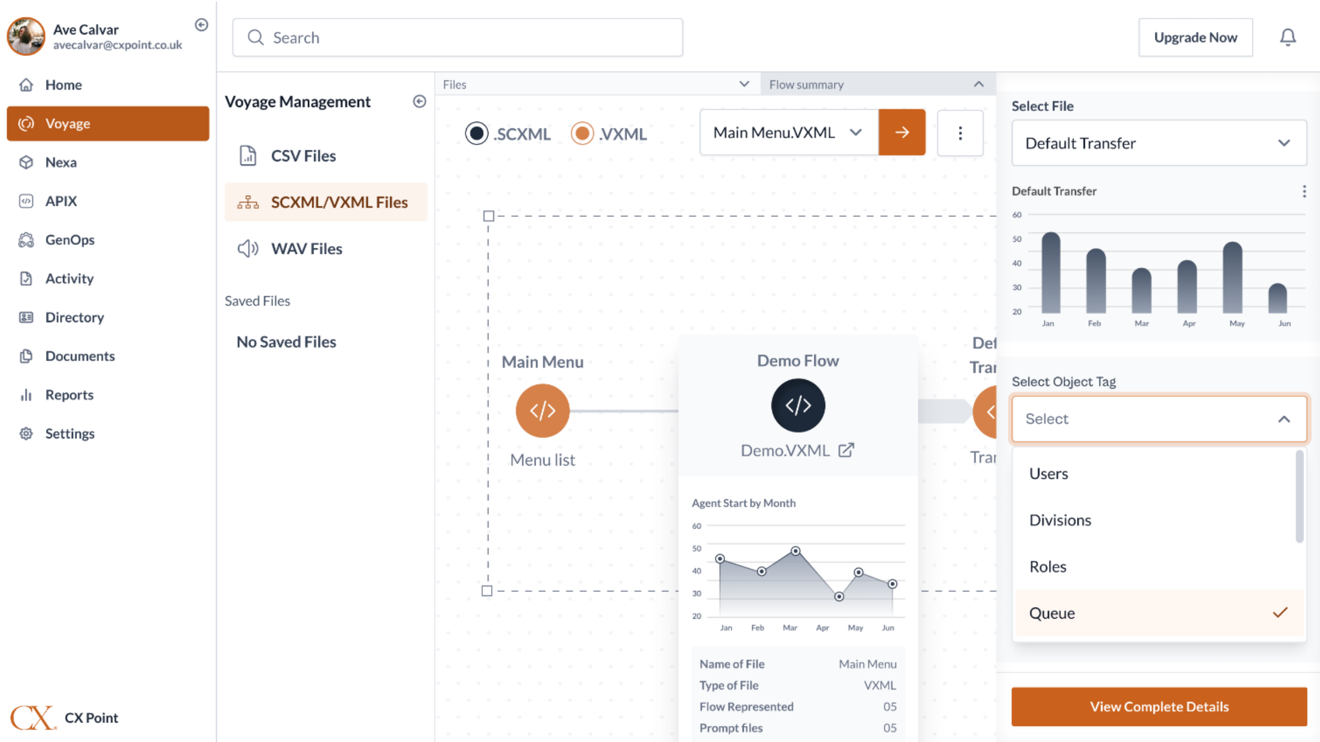
Step 1. Go to Voyage> Select File from Workspace to view flow summary.



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



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

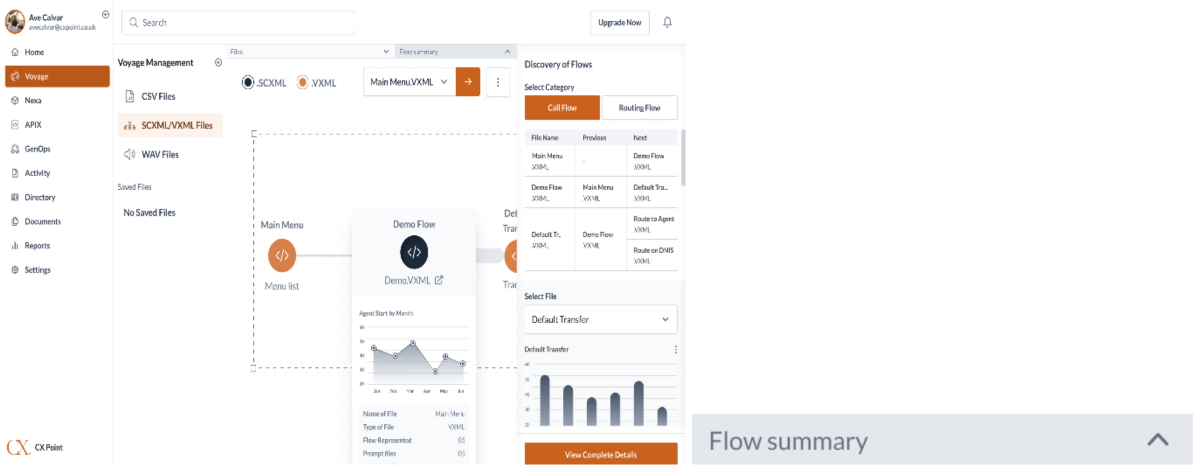


Step 4. Click on ''View Complete details'' to get the Summary of selected Object tag file.

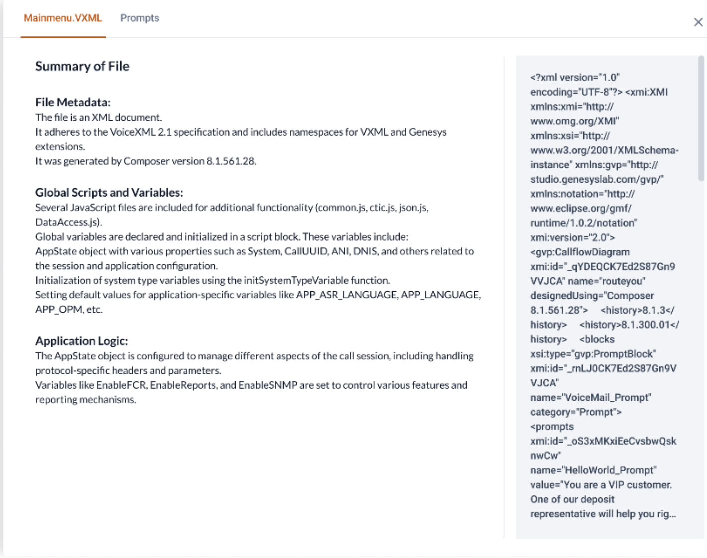
To go back to list of questions click here

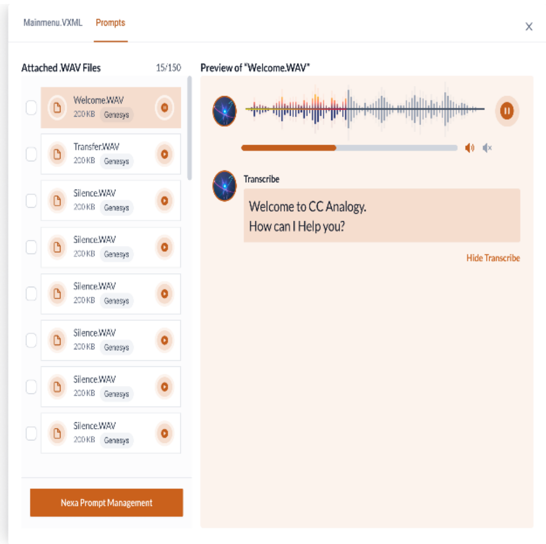
3. Prompts & Transcribe (file meta data, application logic, scripts & variables)

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''.



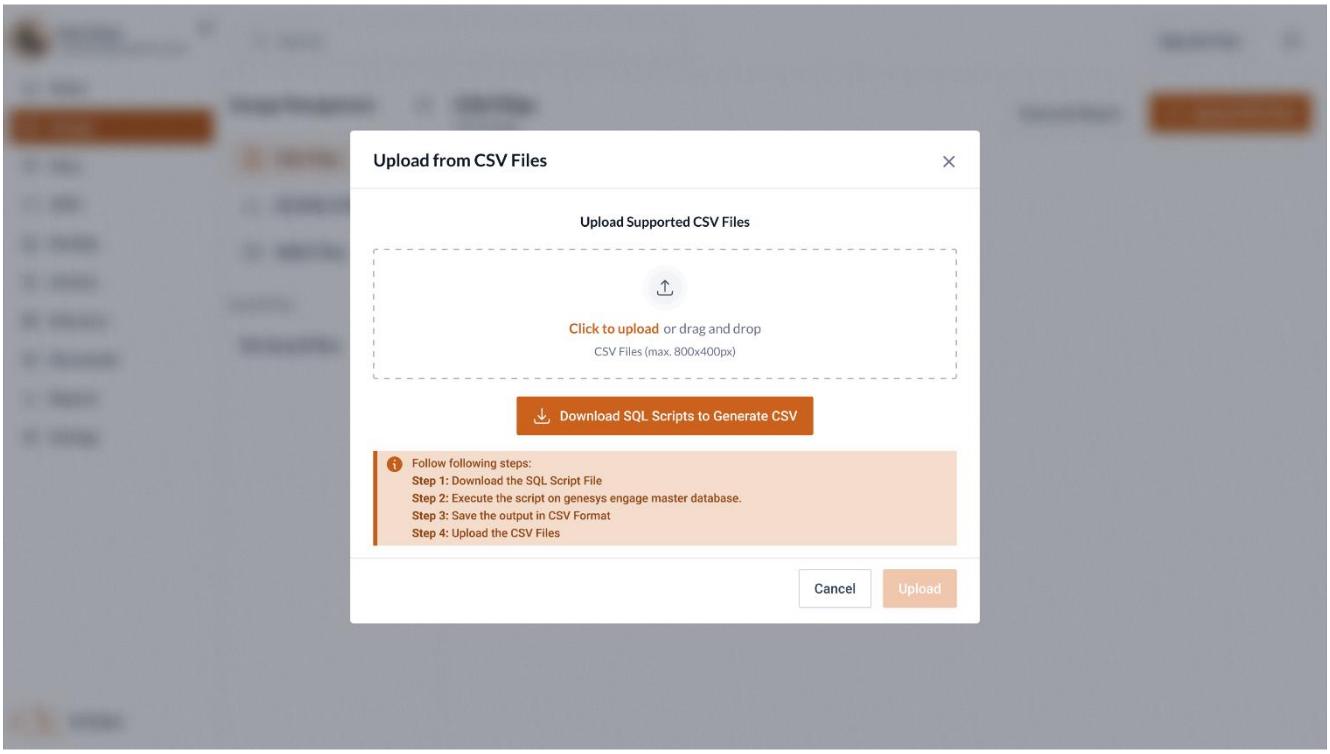


[To go back to list of questions click here]()

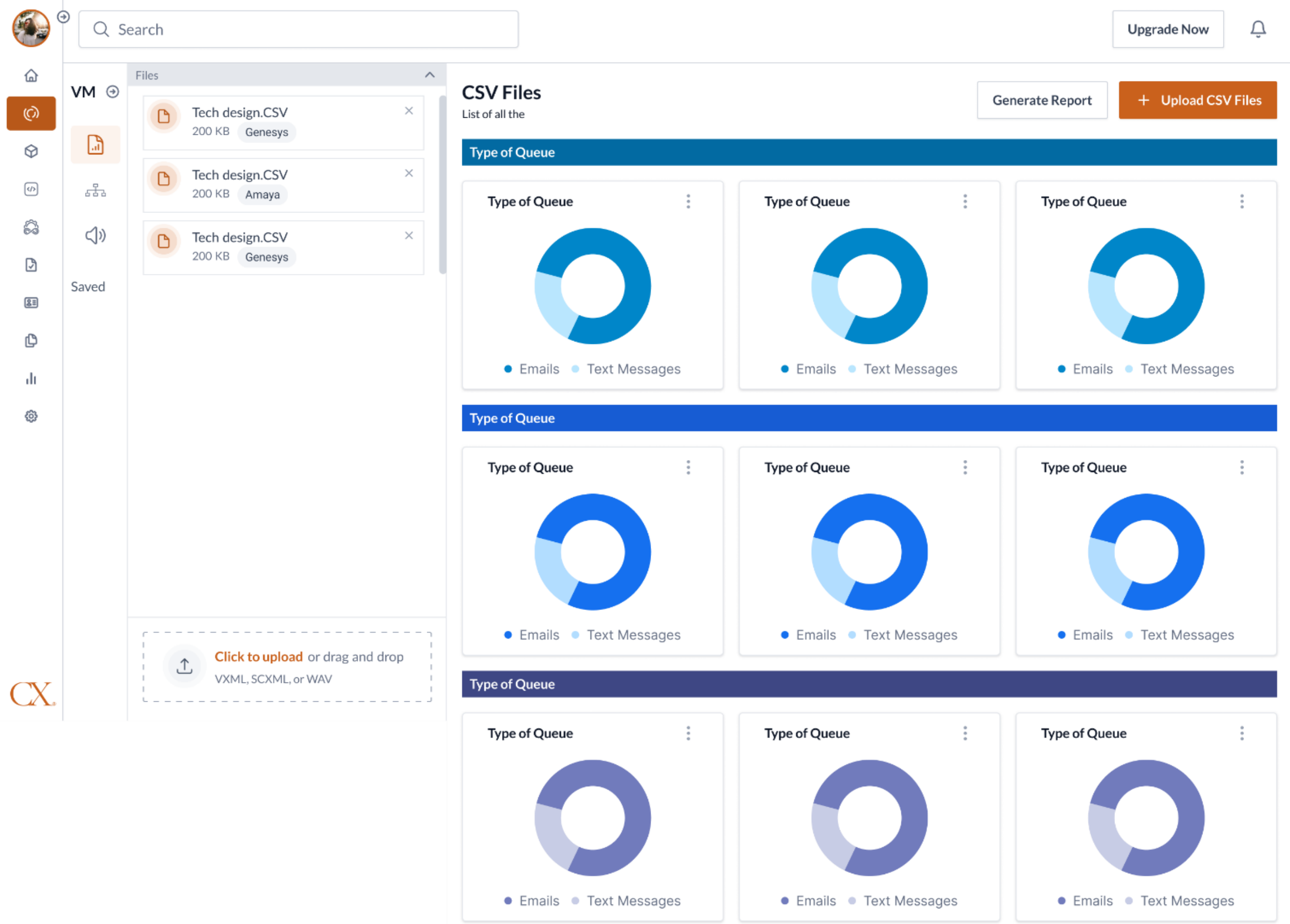
4. How to upload from CSV files

Step 1. Select CSV files option under Voyage Management to select CSV files.

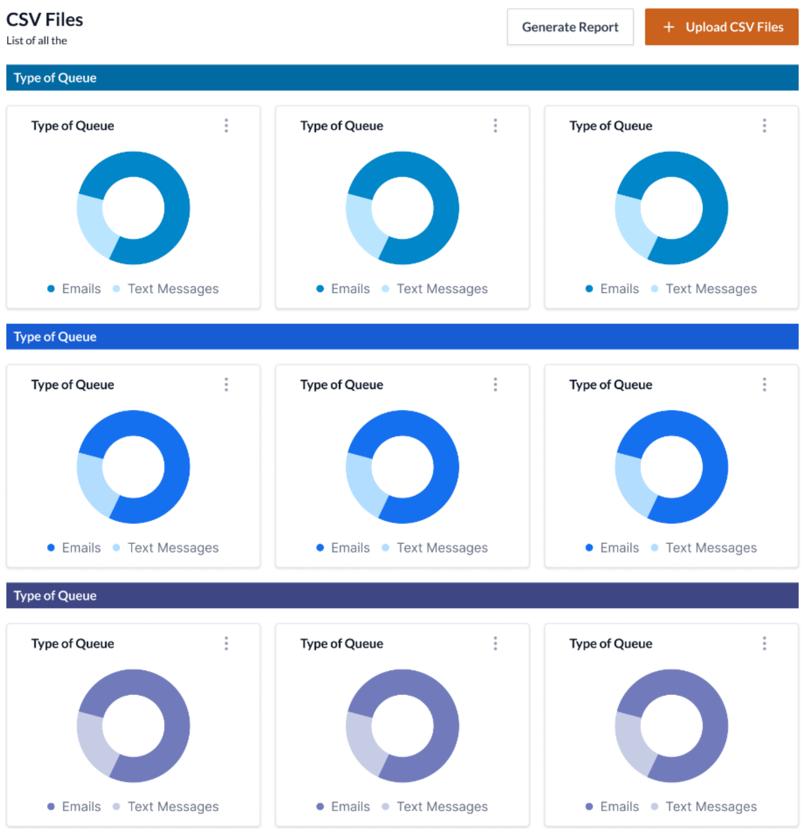
Step 2. Identify the CSV files > Upload the selected file.



Step 3. Selected CSV files is displayed.



Step 4. User can add more CSV files by clicking on ''Upload CSV files" and save files into Workspace.

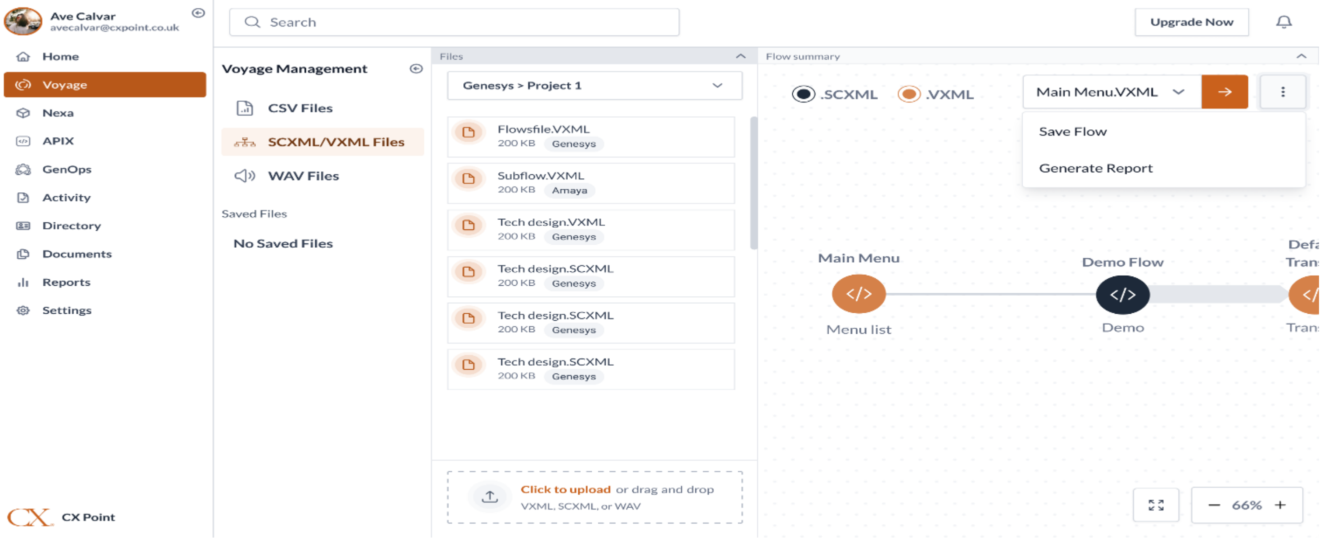


[To go back to list of questions click here]

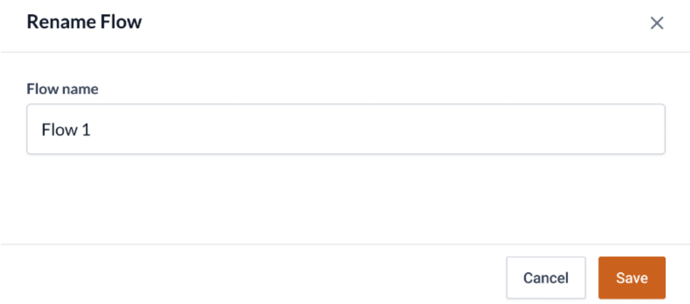
5. Save flow & generate report

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

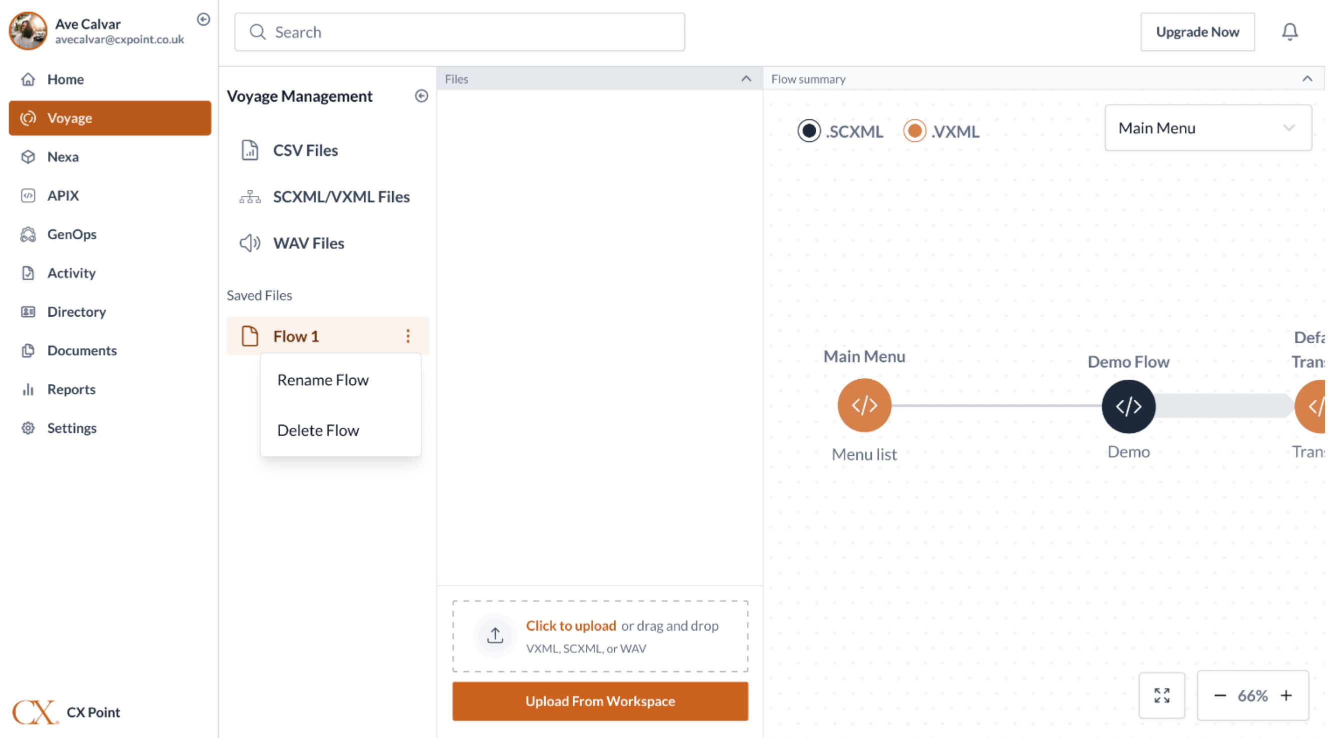
Step 2. Select the flow> and click on ''Save flow'' or click on ''generate report'' to view report.



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*]()

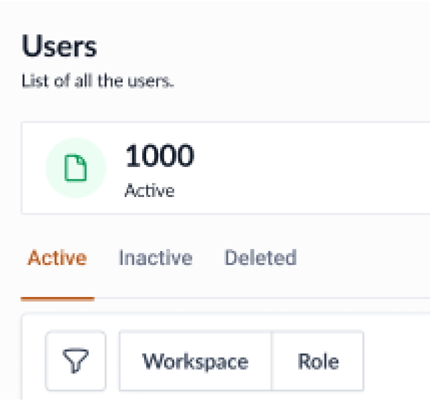
Nexa User

User Object

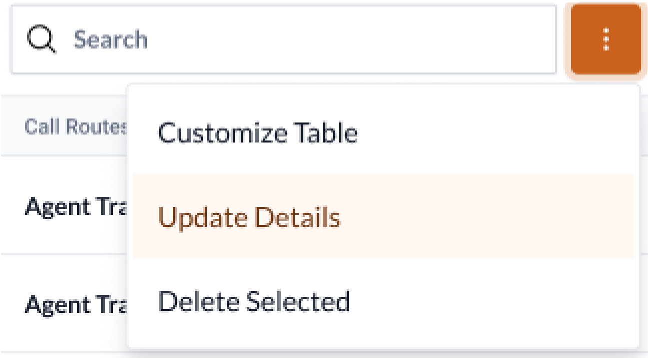
1. How to active and update users?

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.

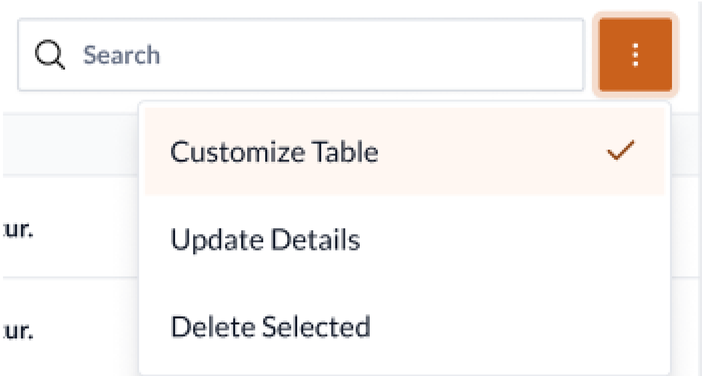
Step 5. Update the details and save.

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

2. *How to customize table?*

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

Step 2. Click on 3 dots beside search bar as shown below.



Step 3. Select Customize Table.

Step 4. Customize the table and select Apply.

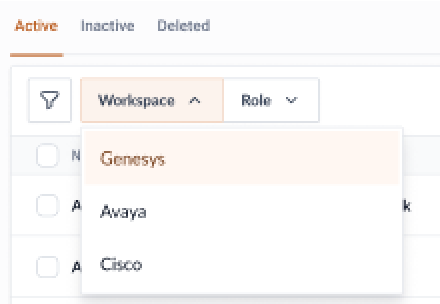
[To go back to list of questions click here]

3. How to use filter and search for user?

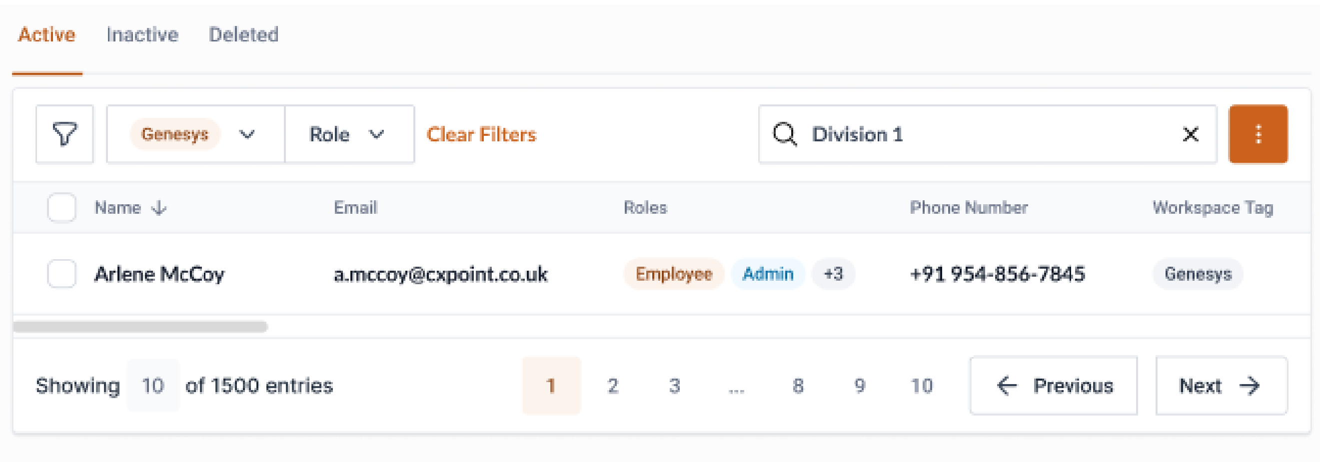
Step 1. Go to Nexa > People & Person > Users

Step 2. Click on Workspace

Step 3. Select Workspace



Step 4. Write your specific detail on search bar and search.



[To go back to list of questions click here]

4. 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.

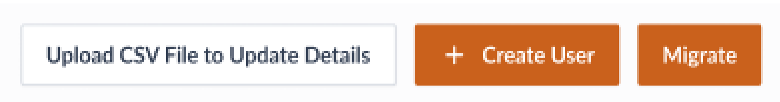
Step 9. Click on submit to create.

To go back to list of questions click here

5. 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.

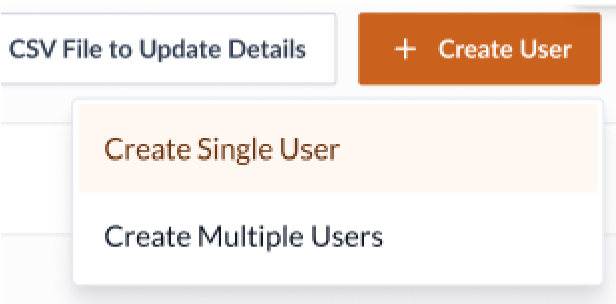
Step 7. Click on submit.

To go back to list of questions click here

6. How to create single user?

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

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



Step 3. Select Create Single User.

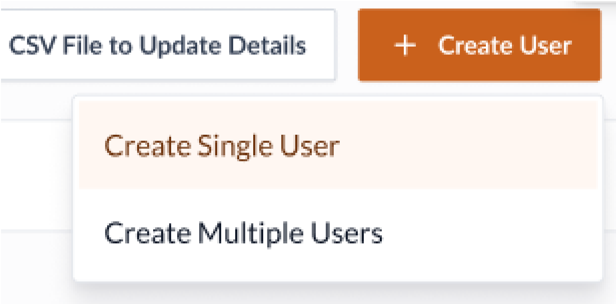
Step 4. Fill in the details and click on submit.

To go back to list of questions click here

7. How to create multiple user?

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

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



Step 3. Select Create Multiple Users.

Step 4. Upload file to create Users.

Step 5. Click on upload or drag and drop or Click on Load from Workspace button.

Step 6. Select file from your device or Select Workspace and click on Open button.

Step 7. Select Project and click on Open button.

Step 8. Select File and click on Submit.

Step 9. Now you can preview the file.

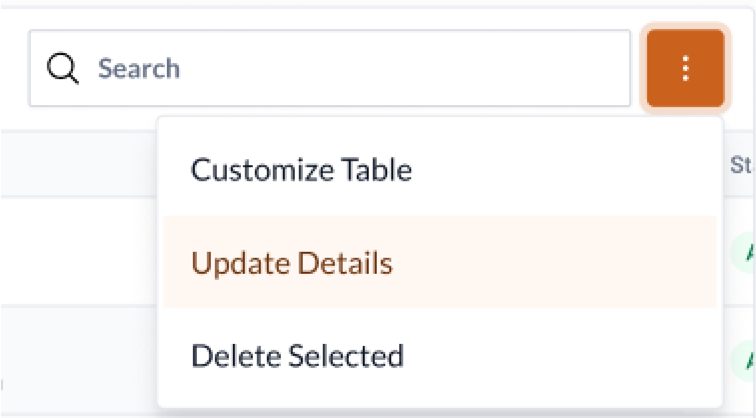
Step 10. Click on submit to create.

To go back to list of questions click here

8. How to upload file to update user details from workspace?

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

Step 2. Click on 3 dots beside search bar as shown below.



Step 3. Select Update Details.

Step 3. Upload file to update user details.

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 go back to list of questions click here

9. How to migrate user?

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

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

Step 3. Upload file for migration or Load files from Workspace.

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

Step 5. Locate and select the file you wish to migrate and then click open or Select Workspace.

Step 6. Then select Project and then select file.

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

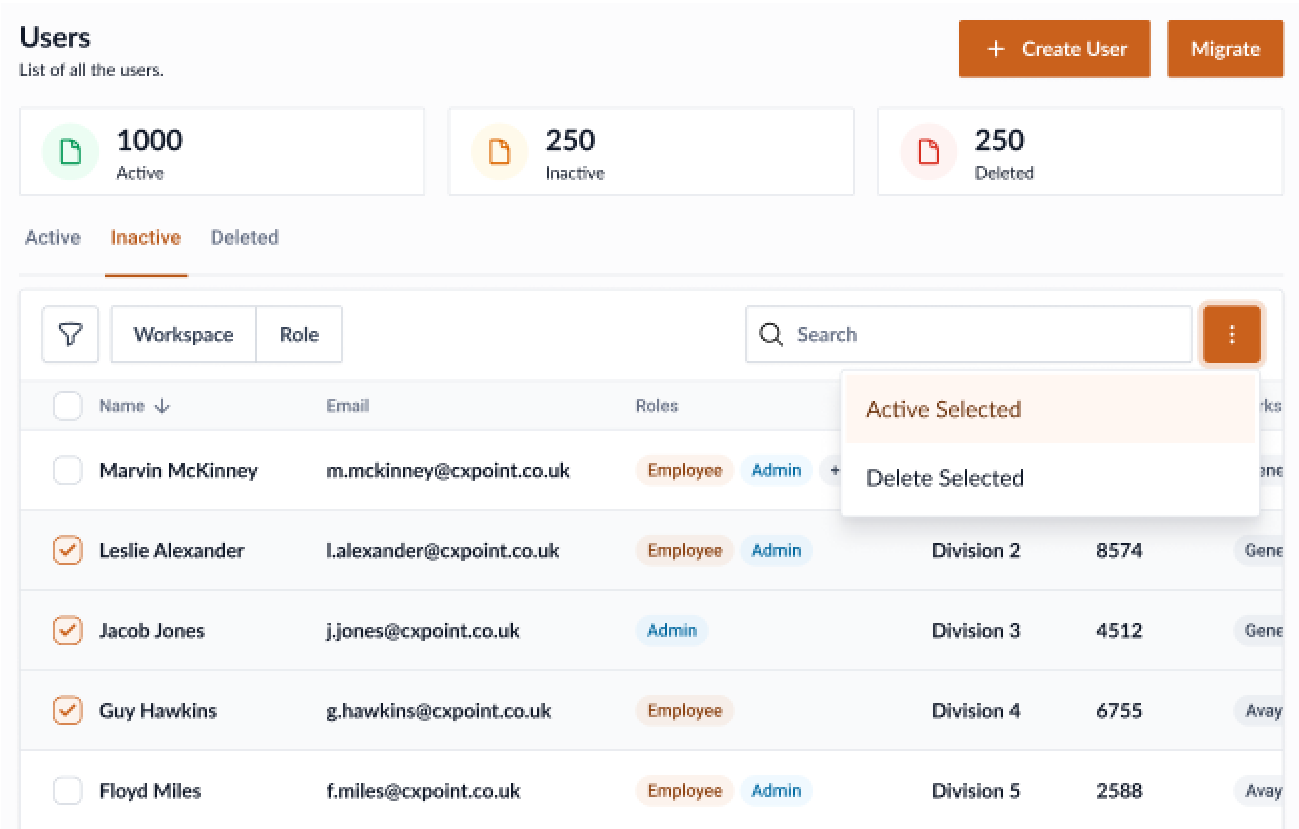
Step 8. Once the file is migrated you can preview the migrated file and create users.

To go back to list of questions click here

10. How to Inactive/Delete user?

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

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

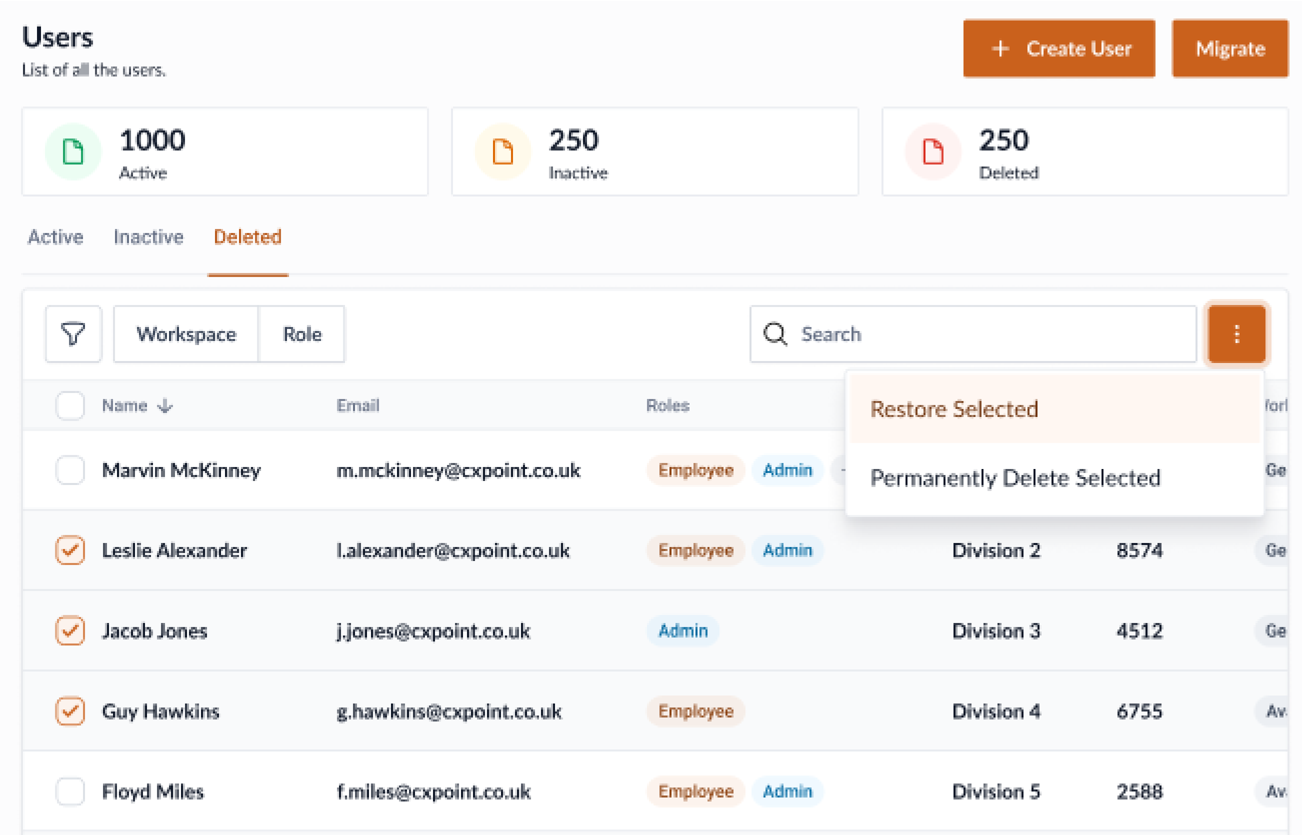


Step 3. Select the users to active or delete the user.

Step 4. Select specific option by clicking on three dots as shown in the above image.

Step 5. Click on Deleted to see all the specific details of the users.

Step 6. Select the users to Restore or permanently delete the user.



Step 7. Select specific option by clicking on three dots as shown in the above image.

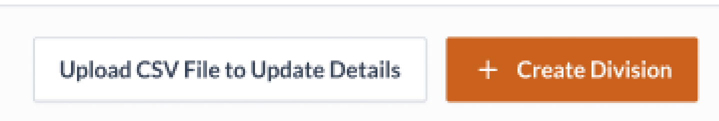
To go back to list of questions click here

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.

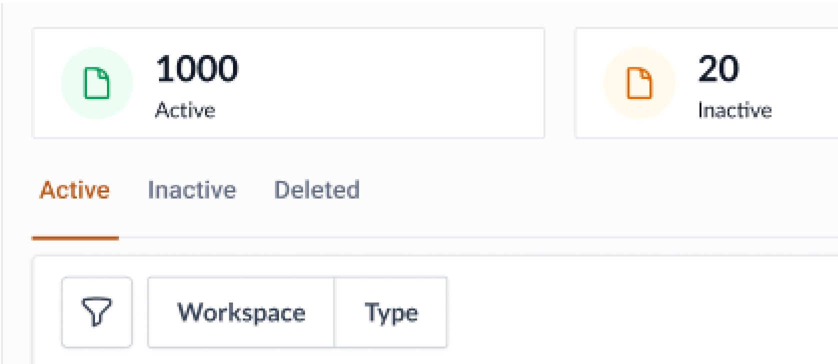
Step 9. Click on submit to create.

[To go back to list of questions click here]

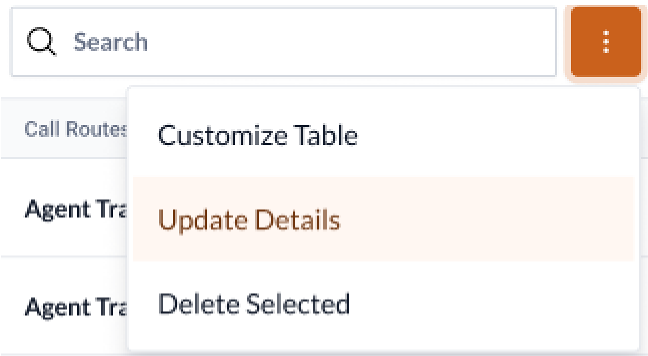
2. How to active and update users?

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.

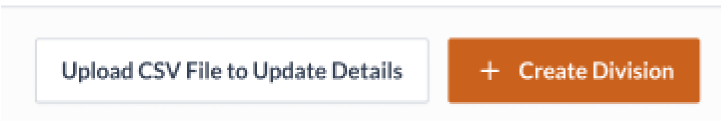
Step 5. Update the details and save.

[To go back to list of questions click here]

3. How to update division details via CSV files?

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

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



Step 3. Upload CSV file to update division 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.

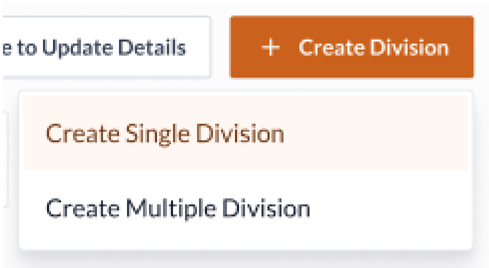
Step 7. Click on submit to update.

To go back to list of questions click here

4. How to create single division?

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

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



Step 3. Select Create Single Division.

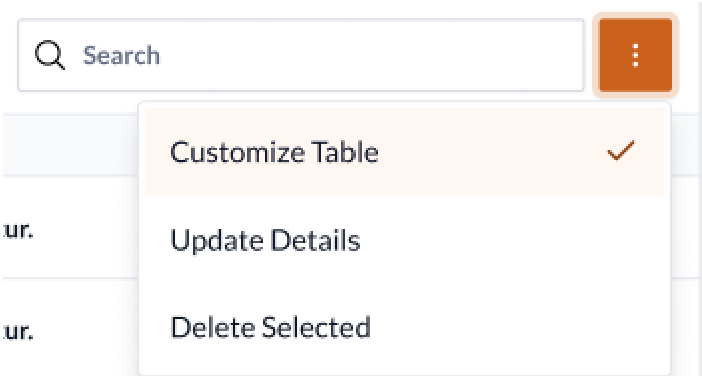
Step 4. Fill in the details and click on submit.

To go back to list of questions click here

5. How to customize table in division?

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

Step 2. Click on 3 dots beside search bar as shown below.



Step 3. Select Customize Table.

Step 4. Customize the table and select Apply.

To go back to list of questions click here

6. How to upload file to create divisions from workspace?

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

Step 2. Click on Workspace

Step 3. Upload file to create divisions.

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.

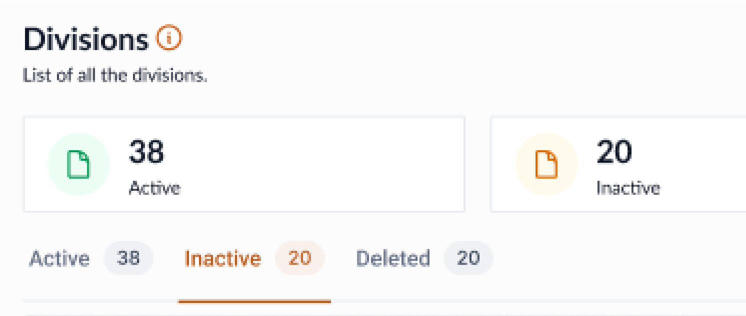
Step 9. Click on submit to create.

To go back to list of questions click here

7. 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.



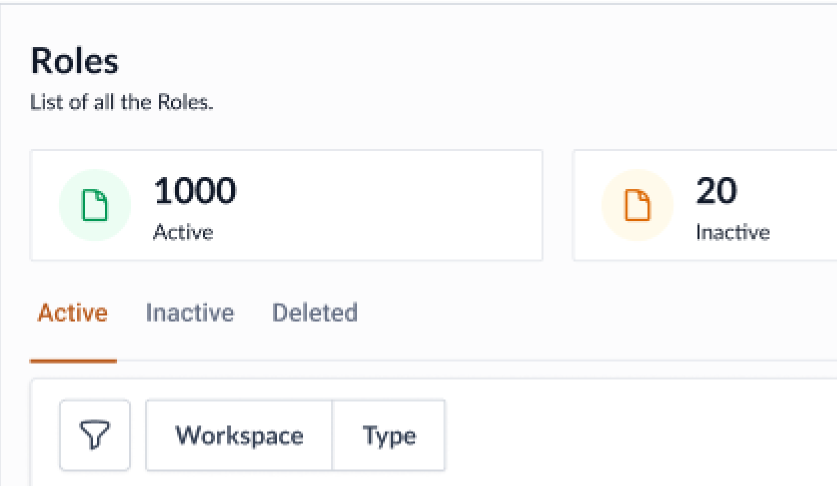
To go back to list of questions click here

Roles object

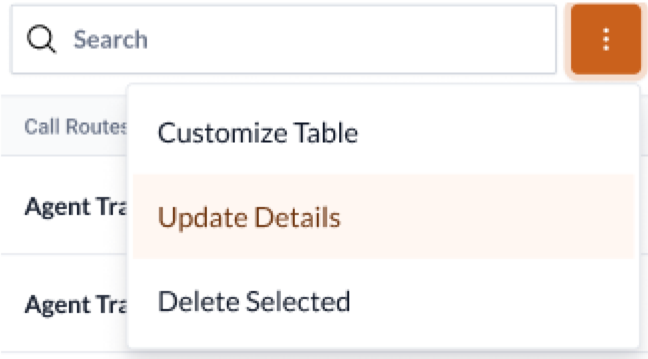
1. How to active and update users?

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

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



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



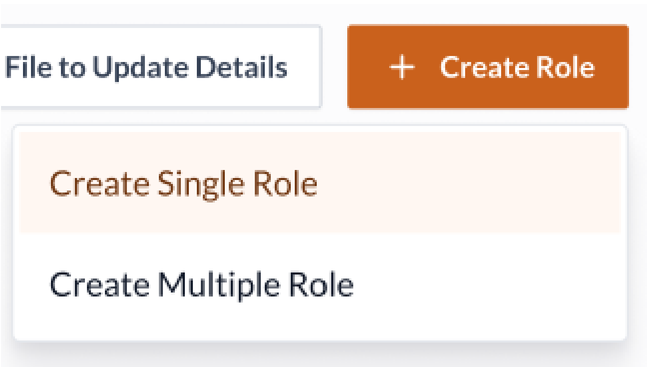
Step 4. Select Update Details.

To go back to list of questions click here

2. 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.

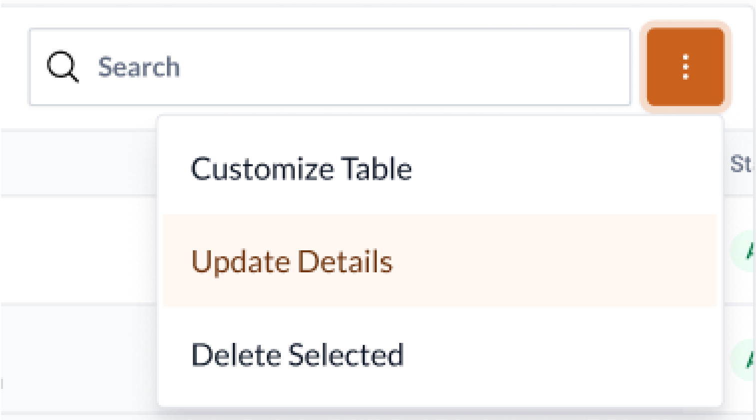
Step 4. Fill in the details and click on submit.

To go back to list of questions click here

3. How to update users via CSV file?

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

Step 2. Click on 3 dots and select Update Details.



Step 3. Upload CSV file to update Roles 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.

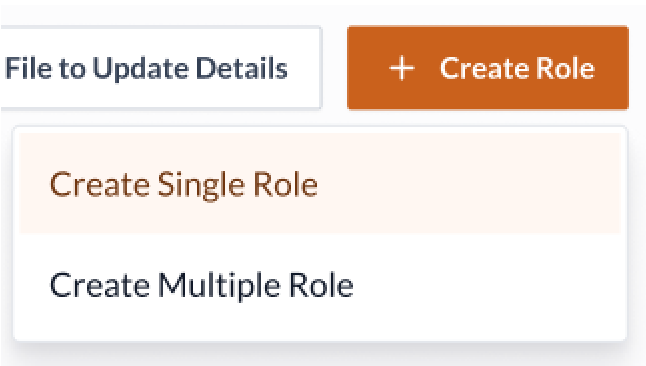
Step 7. Click on submit to update.

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

4. How to create multiple role?

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

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



Step 3. Select Create Multiple Roles.

Step 4. Upload file to create Roles.

Step 5. Click on upload or drag and drop or Click on Load from Workspace button.

Step 6. Select file from your device or Select Workspace and click on Open button.

Step 7. Select Project and click on Open button.

Step 8. Select File and click on Submit.

Step 9. Now you can preview the file.

Step 10. Click on submit to create.

To go back to list of questions click here

5. How to upload file to create roles from workspace?

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

Step 2. Click on Workspace

Step 3. Upload file to create Roles.

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.

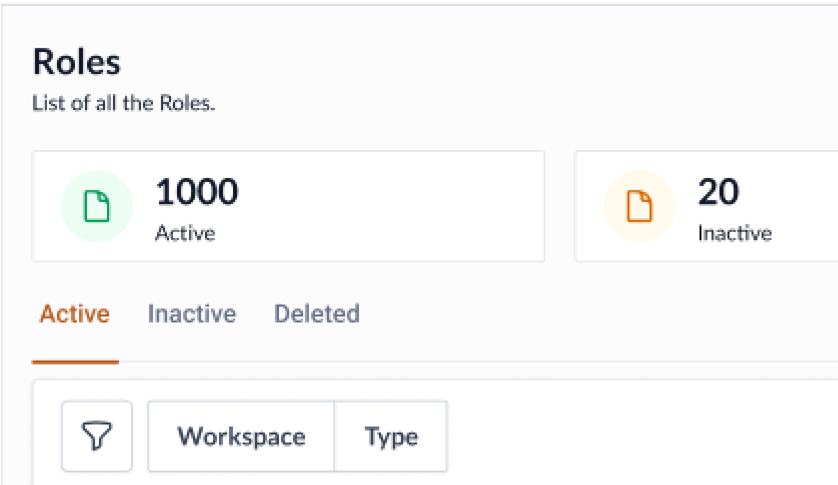
Step 9. Click on submit to create.

To go back to list of questions click here

6. 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 see active queue?

Step 1. Go to Nexa > Contact Center> Queue

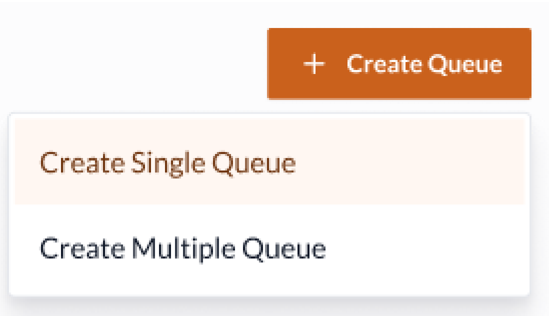
Step 2. Click on Active to see all the active queues.

[To go back to list of questions click here]

2. 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.

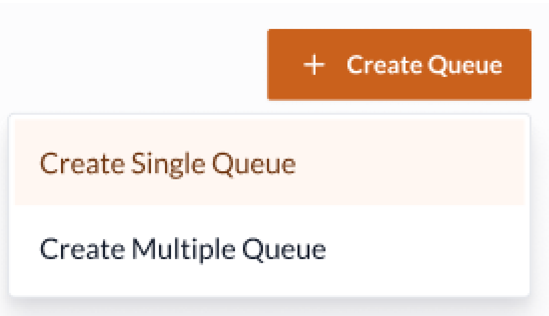
Step 4. Fill in the details and click on submit.

[To go back to list of questions click here]

3. How to create multiple queue?

Step 1. Go to Nexa > Contact Center> Queues

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



Step 3. Select Create Multiple Queue.

Step 4. Upload file to create queue.

Step 5. Click on upload or drag and drop or Click on Load from Workspace button.

Step 6. Select file from your device or Select Workspace and click on Open button.

Step 7. Select Project and click on Open button.

Step 8. Select File and click on Submit.

Step 9. Now you can preview the file.

Step 10. Click on submit to create.

To go back to list of questions click here

4. 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.

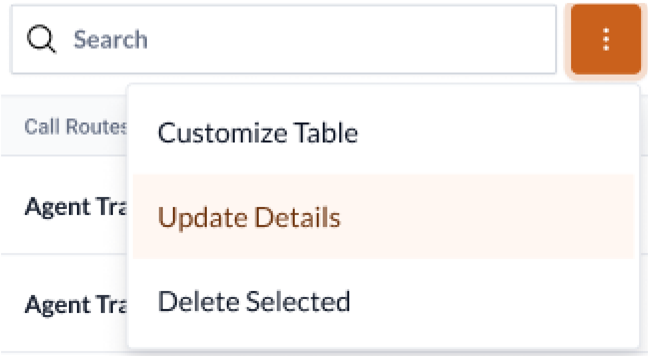
To go back to list of questions click here

2. How to active and update Skills?

Step 1. Go to Nexa > Contact Center> Skills

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.

To go back to list of questions click here

3. How to update skills via CSV files?

Step 1. Go to Nexa > Contact Center> Skills

Step 2. Click on Workspace

Step 3. Upload CSV file to update Skill 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.

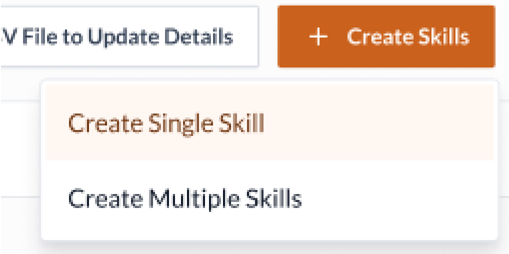
Step 7. Click on submit to update.

To go back to list of questions click here

4. How to create single skill?

Step 1. Go to Nexa > Contact Center> Skills

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



Step 3. Select Create Single Skill.

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

To go back to list of questions click here

5. *How to upload skills from workspace?*

Step 1. Go to Nexa > Contact Center> Skills

Step 2. Click on Workspace

Step 3. Upload file to create Skills.

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.

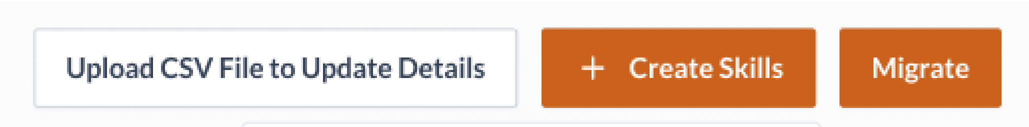
Step 9. Click on submit to create.

To go back to list of questions click here

6. *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

Language object

1. *How to search Language?*

Step 1. Go to Nexa > Contact Center> Languages

Step 2. You can see Language tab

To go back to list of questions click here

Call Routing object

1. How to create users in call routing?

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 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.

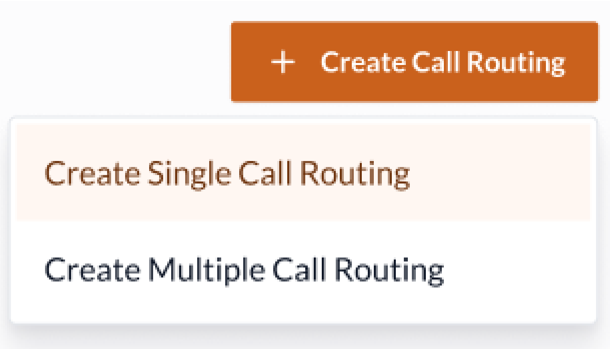
Step 9. Click on submit to create.

To go back to list of questions click here

2. How to create single call routing?

Step 1. Go to Nexa > Routing > Call Routing

Step 2. Click on +Create Call Routing button on top right corner.



Step 3. Select Create Single Call Routing.

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

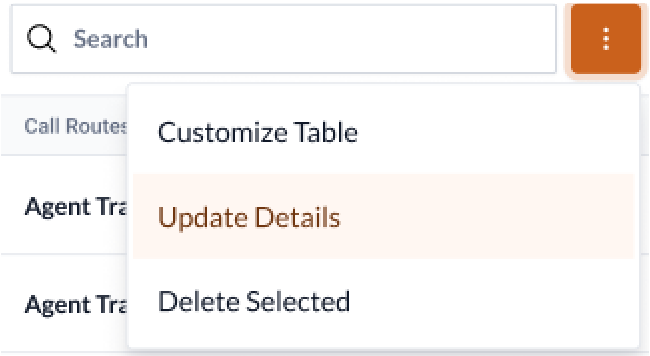
To go back to list of questions click here

3. How to active and update users in call routing?

Step 1. Go to Nexa > Routing > Call Routing

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.

[To go back to list of questions click here]

4. How to update users via CSV file?

Step 1. Go to Nexa > Routing > Call Routing

Step 2. Click on Workspace

Step 3. Upload CSV file to update Call Routing 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 update.

[To go back to list of questions click here]

5. 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 users in emergency group?*

Step 1. Go to Nexa > Routing > Emergency Groups

Step 2. Click on Workspace

Step 3. Upload file to create Emergency Groups.

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 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.

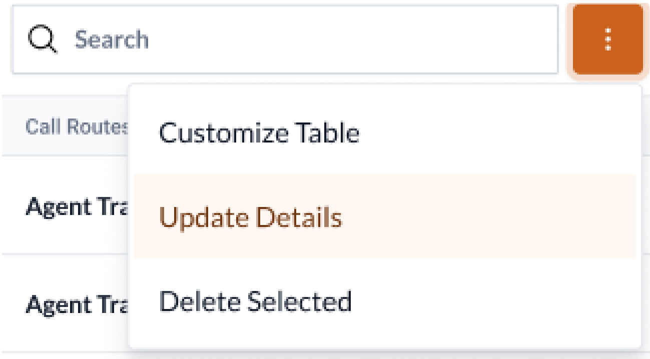
To go back to list of questions click here

3. *How to see active and update users in emergency group?*

Step 1. Go to Nexa > Routing > Emergency Groups

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.

To go back to list of questions click here

4. *How to update users via CSV file?*

Step 1. Go to Nexa > Routing > Emergency Groups

Step 2. Click on Workspace

Step 3. Upload CSV file to update Emergency Groups 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 update.

To go back to list of questions click here

5. *How to upload file to create emergency groups from workspace?*

Step 1. Go to Nexa > Routing > Emergency Groups

Step 2. Click on Workspace

Step 3. Upload file to create Emergency Groups.

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

Scheduling object

1. How to create users in schedule?

Step 1. Go to Nexa > Routing > Scheduling

Step 2. Click on Workspace

Step 3. Upload file to create Scheduling.

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.

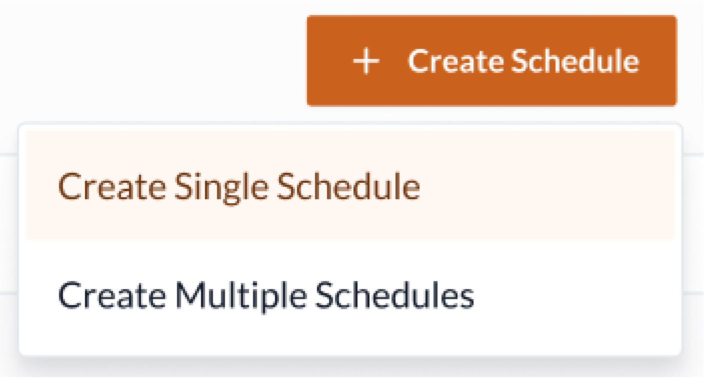
Step 9. Click on submit to create.

To go back to list of questions click here

2. How to 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

3. How to update users via CSV file?

Step 1. Go to Nexa > Routing > Scheduling

Step 2. Click on Workspace

Step 3. Upload CSV file to update Scheduling 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 update.

To go back to list of questions click here

4. 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

5. How to migrate users from schedule?

Step 1. Go to Nexa > Routing > Scheduling

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.

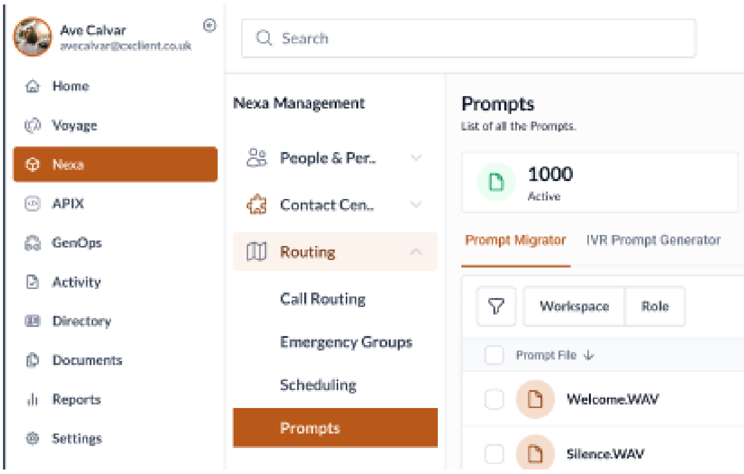
Step 8. Now you can preview the migrated file and create users.

To go back to list of questions click here

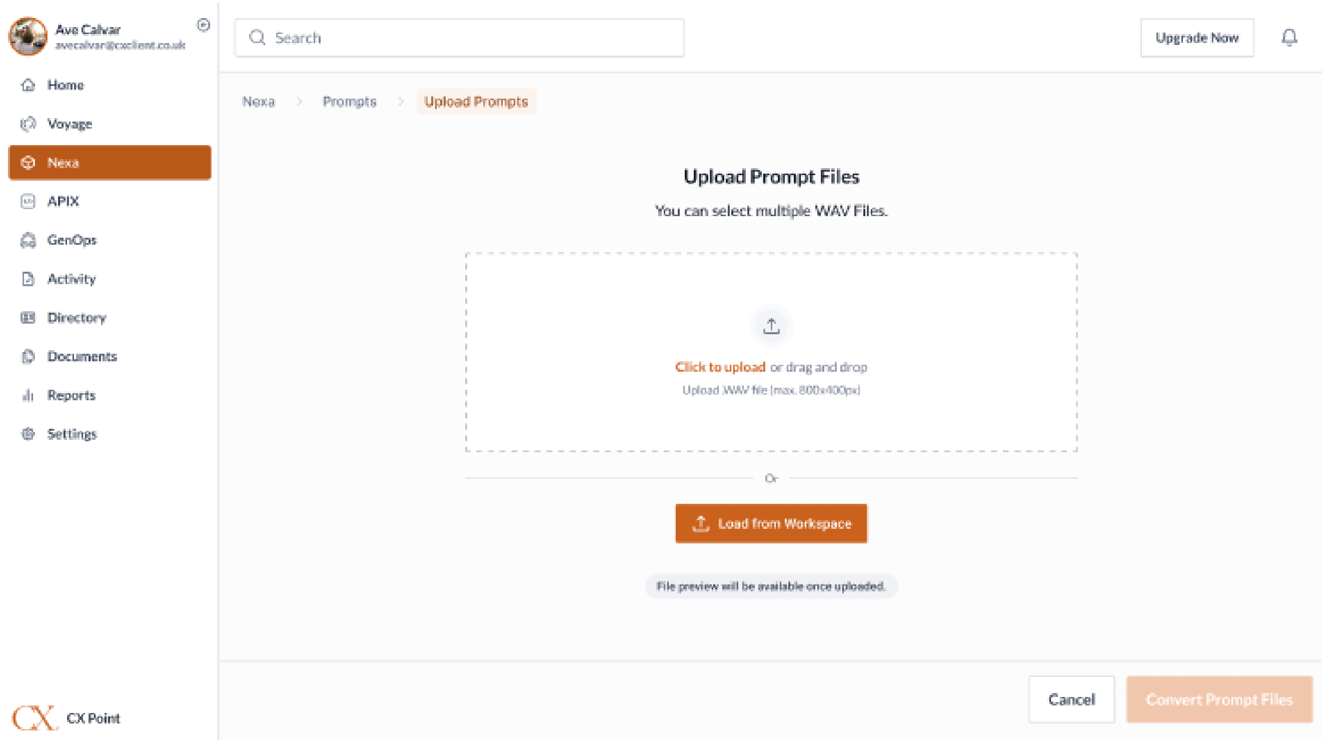
Prompts object

1. How to use prompt converter?

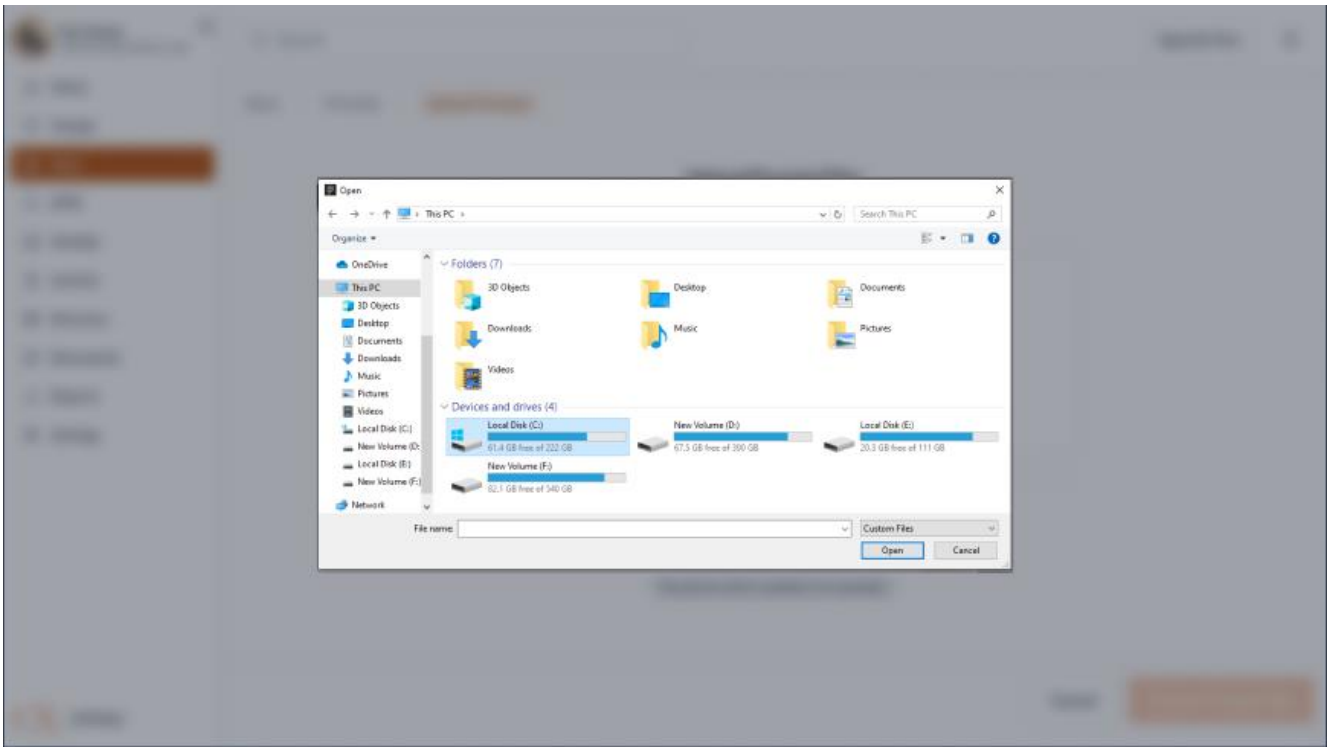
Step 1. Go to Nexa > Routing > Prompts > Prompt Migrator



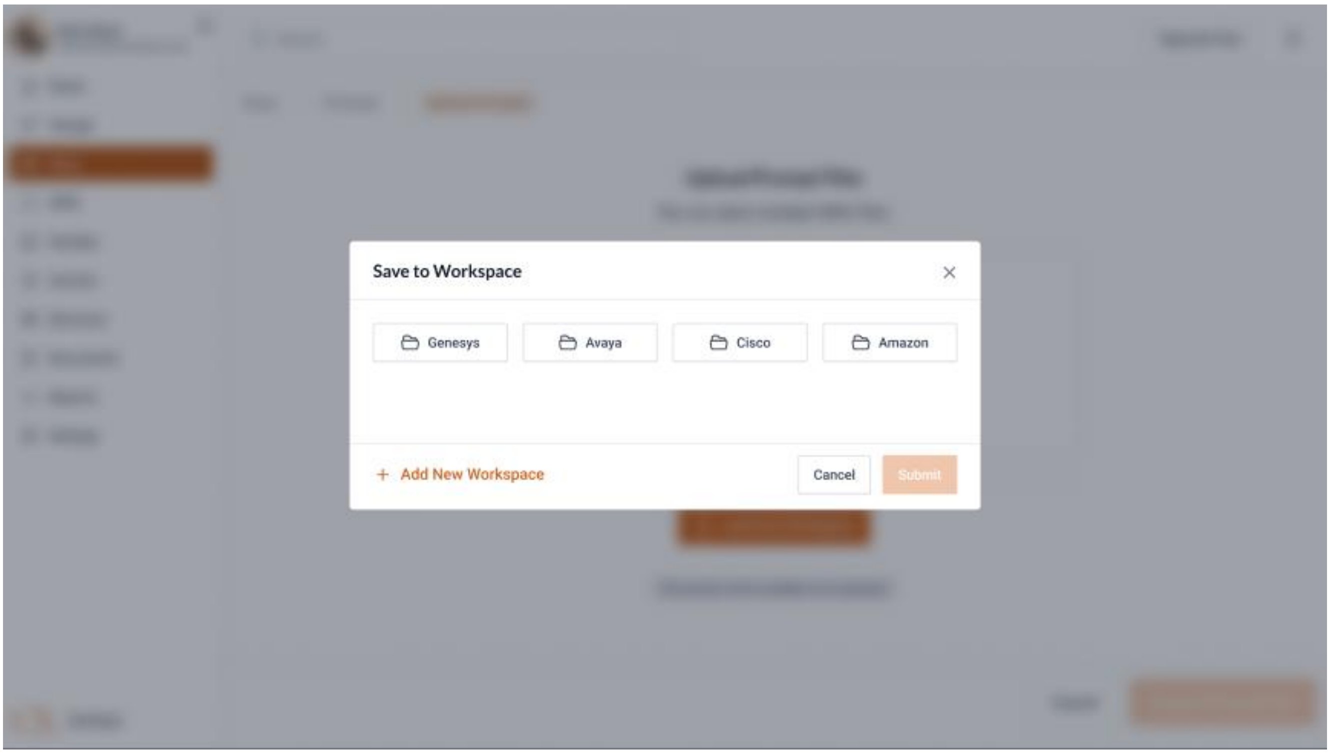
Step 2. Select the prompt that you want to edit or update



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

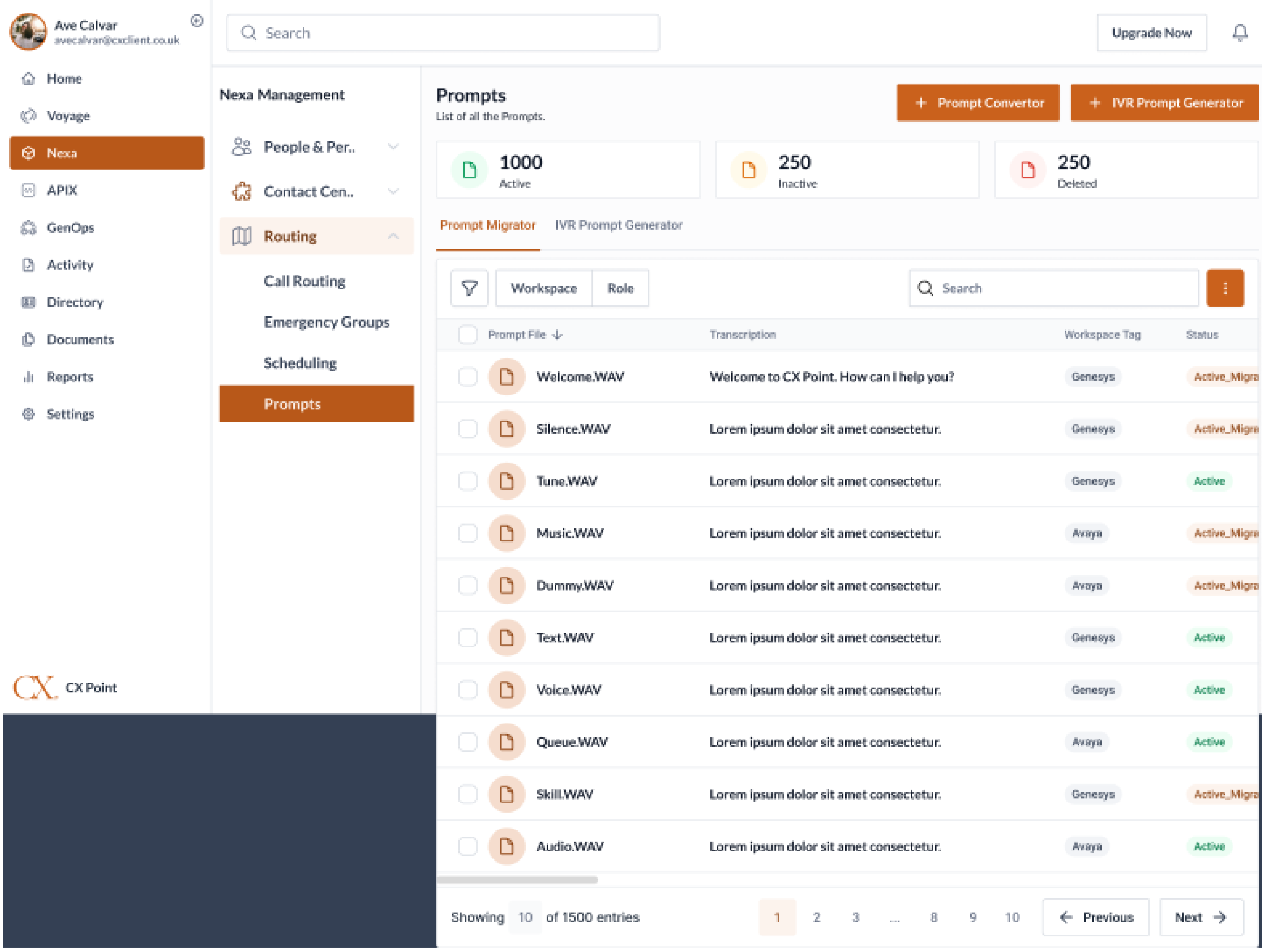
Step 8. Select the prompt that you want to edit or update

[To go back to list of questions click here]

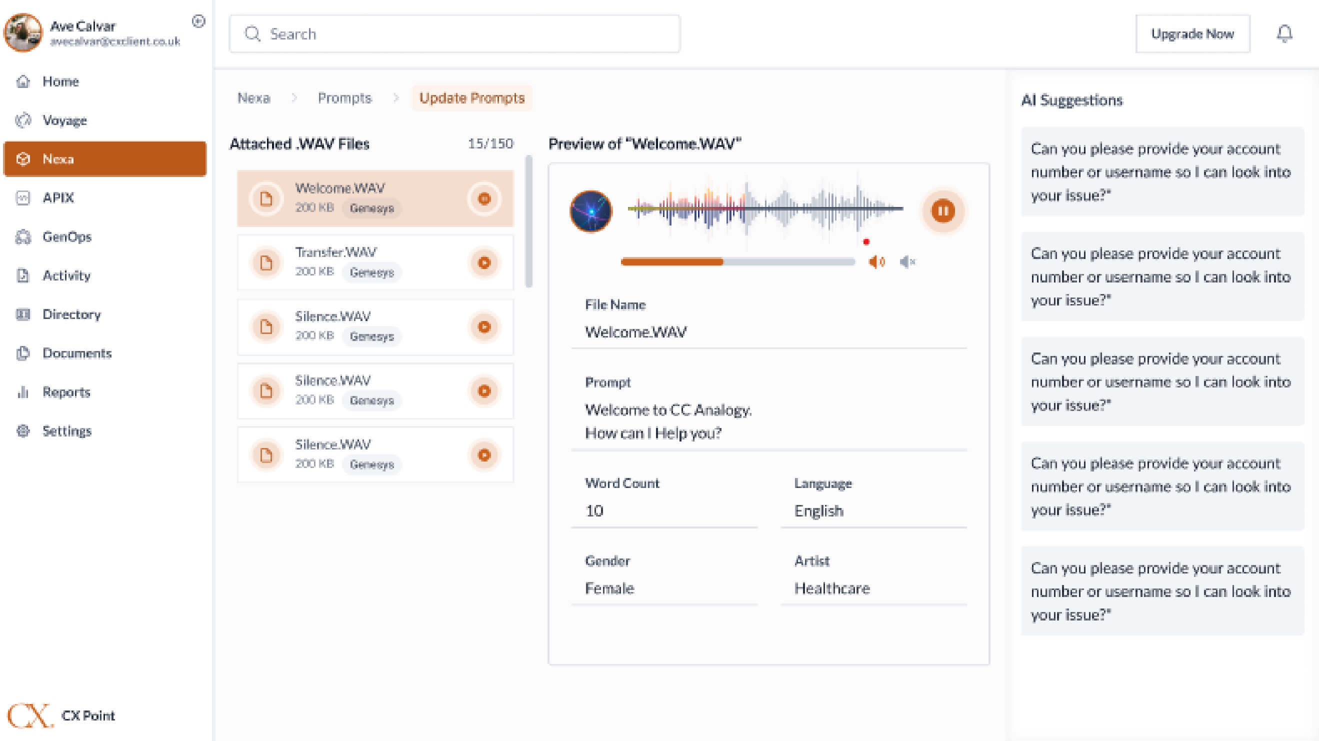
2. *How to edit prompt?*

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

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



Step 3. Update Prompts

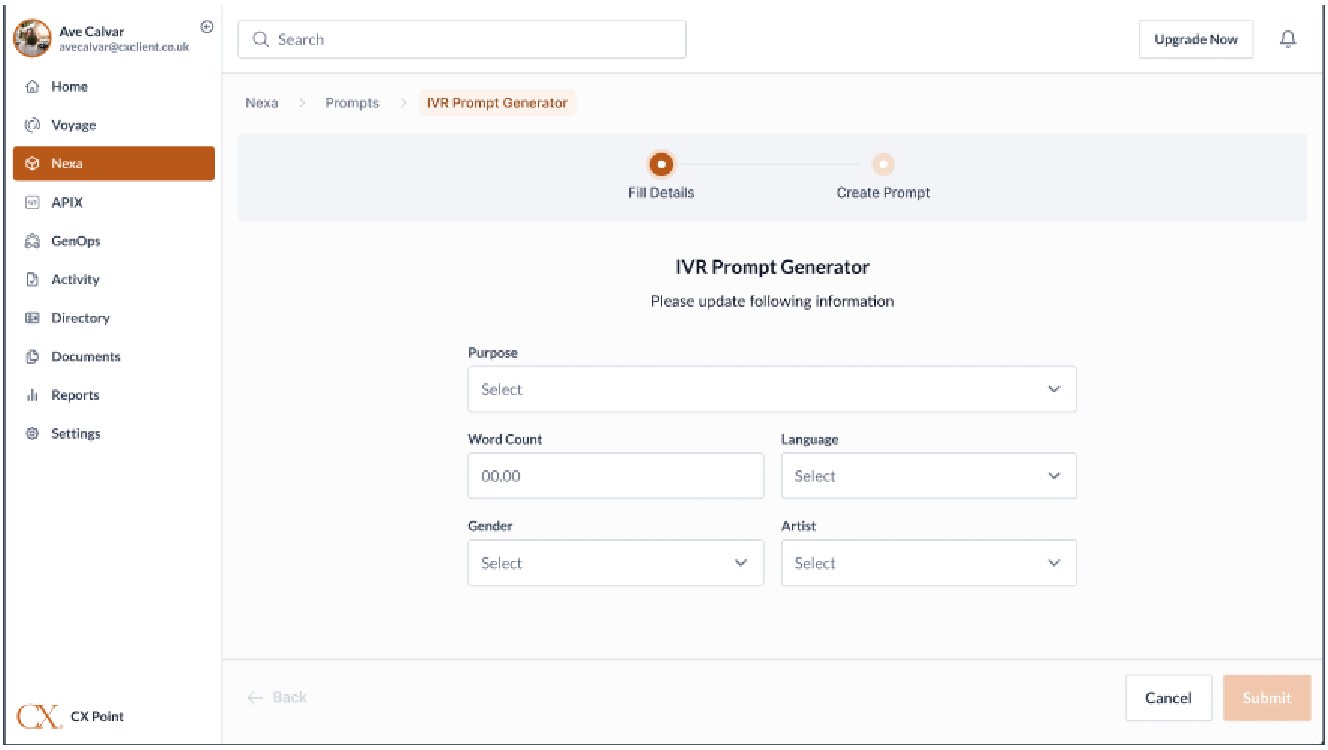


[To go back to list of questions click here]

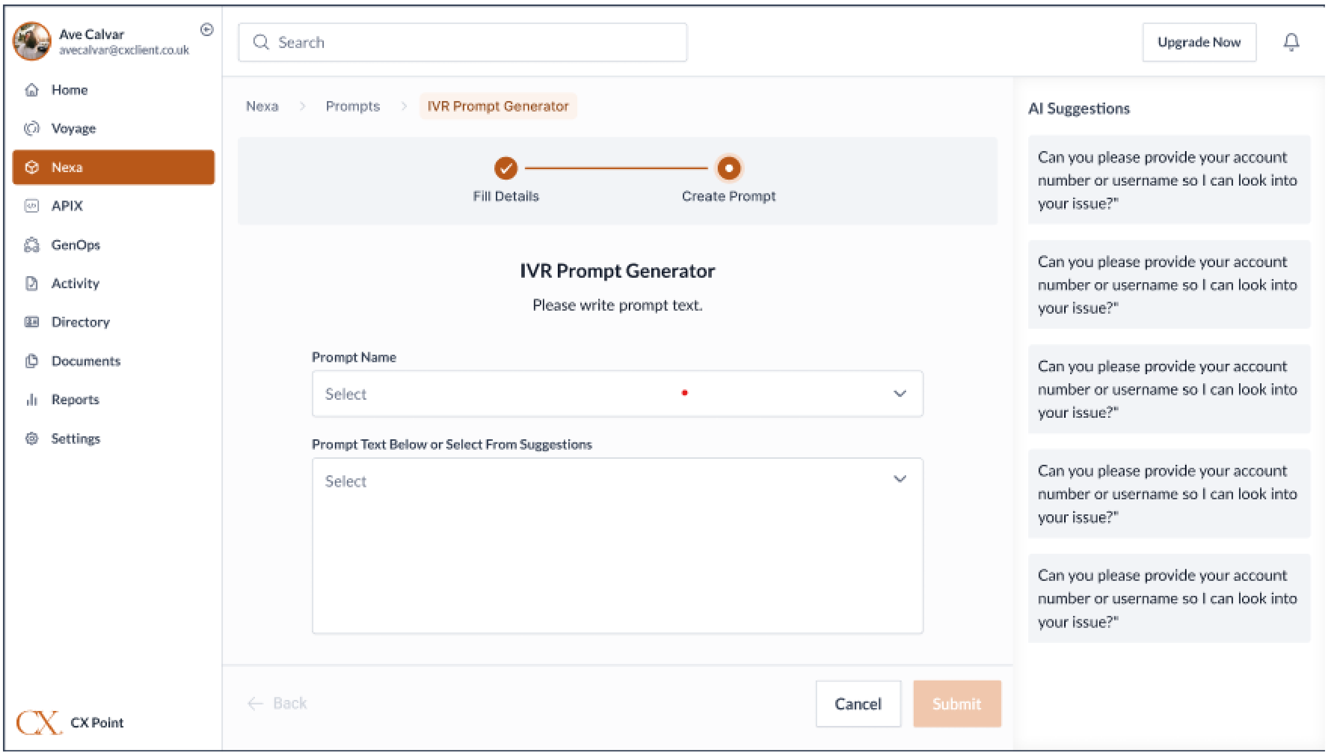
3. How to use IVR prompt generator?

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

Step 2. Fill Details and click on submit



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*]