



Nextiva Chat

VERSION 1.3

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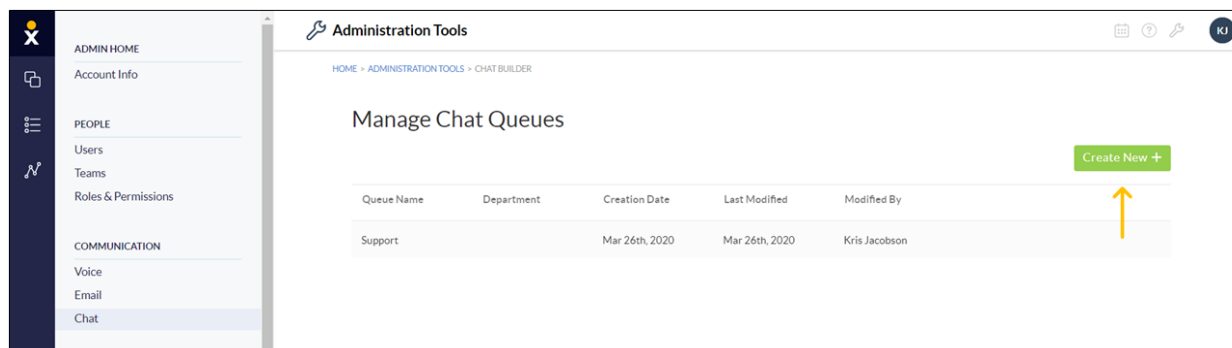
Nextiva Chat

Use Nextiva Chat to have real conversations with your customers. Nextiva Chat allows you to deliver faster service, boost overall efficiency, and solve customer issues quickly. Apply Nextiva Chat anywhere on your website to interact with customers and prospects in real-time.

Creating a New Chat Queue (Admin)

Nextiva Chat requires at least one Chat Queue to distribute chats to the assigned Teams and Users in Nextiva CRM. Administrators can create Chat Queues, including uploading photos, specifying chat limits, and creating schedules for each Chat Queue.

1. Visit nextiva.com, and click **Login** to log in to NextOS.
2. From the NextOS Home Page, select **Chat**.
3. Click the **Create New +** button.



Create New + Button

4. On the **Queues** tab, complete the following fields:
 - a. **Queue Title:** Enter a name for the queue in the text box.
 - b. **Users:** From the drop-down list, select the **Agents** or **Teams** to assign to this Chat queue. Click the **X** next to the selected Agent/Team to remove it.
 - c. **Distribution:** Round-Robin is currently the only distribution option available. Round-Robin distributes incoming chats based on the Agent who has been online and available the longest.
 - d. **Offline Distribution:** Select one or more **Teams** from the drop-down list to receive offline customer inquiries. Only Teams with an email associated with the Team are listed. This offline distribution must be set to create a new queue.

- e. **Queue Limits:** In the text box, enter the maximum number of website visitors allowed to wait in the queue for an Agent before live chat switches to offline chat.
- f. Click **Save**.
- g. Click **Save and Continue**.

The screenshot displays the 'Administration Tools' interface for 'CHAT BUILDER'. The main content area is titled 'Queue Creation' and contains the following fields and options:

- QUEUE TITLE:** A text input field containing 'Sales'.
- DISTRIBUTION:** A dropdown menu set to 'Round-Robin' with the note 'Each chat goes to only one available agent'.
- OFFLINE-DISTRIBUTION:** A dropdown menu set to 'Sales' with the note 'Choose a department with an assigned agent'.
- SMS Settings:** A toggle switch that is currently turned on.
- SMS NUMBER:** A dropdown menu set to 'Unassigned' with the note 'Choose an SMS number for this queue'.
- USERS:** A dropdown menu is open, showing a list of options: 'Sales', 'Select Agents', 'General', 'Support', 'Training', and 'Customer Care'.

At the bottom of the form are 'Cancel' and 'Save' buttons. On the right side, there is a 'Settings' panel with two steps: '1 Settings' (Apply website chat preferences) and '2 Website Code'.

Queue Creation

Specifying Chat Limits

The chat limit defines the maximum number of chats a User can receive across all assigned Chat Queues. Administrators can specify:

- The same chat limit for all Users in a Team
- Specific chat limits for each User in a Team
- The same chat limit in bulk (i.e. for Users across multiple Teams)

To specify the same chat limit for all Users in a Team:

1. In the **Max Chat Limit** text box for the desired Team, enter the maximum number of chats allowed for each User to take at a time.
2. Click **Save and Continue**.

The screenshot shows the 'Administration Tools' interface. The breadcrumb trail is 'HOME > ADMINISTRATION TOOLS > CHAT BUILDER'. There are four tabs: 'Queues', 'Chat Limits & Avatars' (which is active), 'Proactive Chat', and 'Schedule'. Below the tabs is a search bar with the placeholder text 'Search for departments or agents to display below'. There is an 'Action' dropdown menu. Below that is a table with columns for 'DEPARTMENT', 'USER', and 'MAXCHAT LIMIT'. The 'Sales' department is selected, and the 'MAXCHAT LIMIT' is set to 3, which is highlighted with a yellow box.

DEPARTMENT	USER	MAXCHAT LIMIT
<input checked="" type="checkbox"/> Sales	See Users >	3

Max Chat Limit for All Users

To specify different chat limits for each User in a Team:

1. Click **See Users >** to expand the list of Users for the desired Team.
2. In the **Max Chat Limit** text box next to each User, enter the maximum number of chats allowed for the User to take at a time.
3. Click **Save and Continue**.

Administration Tools

HOME > ADMINISTRATION TOOLS > CHAT BUILDER

Queues **Chat Limits & Avatars** Proactive Chat Schedule

Search for departments or agents to display below

Action ▾

<input type="checkbox"/>	DEPARTMENT	USER	MAX CHAT LIMIT
<input type="checkbox"/>	Sales	See Users ▾	<input type="text"/>
<input type="checkbox"/>		john smith	<input type="text" value="5"/>
<input type="checkbox"/>		Kris Jacobson	<input type="text" value="3"/>

Max Chat Limit for Each User

To specify the same chat limit in bulk:

1. Under **Settings**, select the **Chat Limits & Avatars** tab.
2. Select the checkboxes corresponding to the desired Teams.
3. Click the **Action** button, then select **Edit Max Chat Limit**.

Administration Tools

HOME > ADMINISTRATION TOOLS > CHAT BUILDER

Queues **Chat Limits & Avatars** Proactive Chat Schedule

Search for departments or agents to display below

Action ▾

- Edit Max Chat Limit
- Edit User Avatars

<input checked="" type="checkbox"/>	DEPARTMENT	USER	MAX CHAT LIMIT
<input checked="" type="checkbox"/>	Sales	See Users ▾	<input type="text"/>
<input checked="" type="checkbox"/>		john smith	<input type="text" value="5"/>
<input checked="" type="checkbox"/>		Kris Jacobson	<input type="text" value="5"/>

Max Chat Limit in Bulk

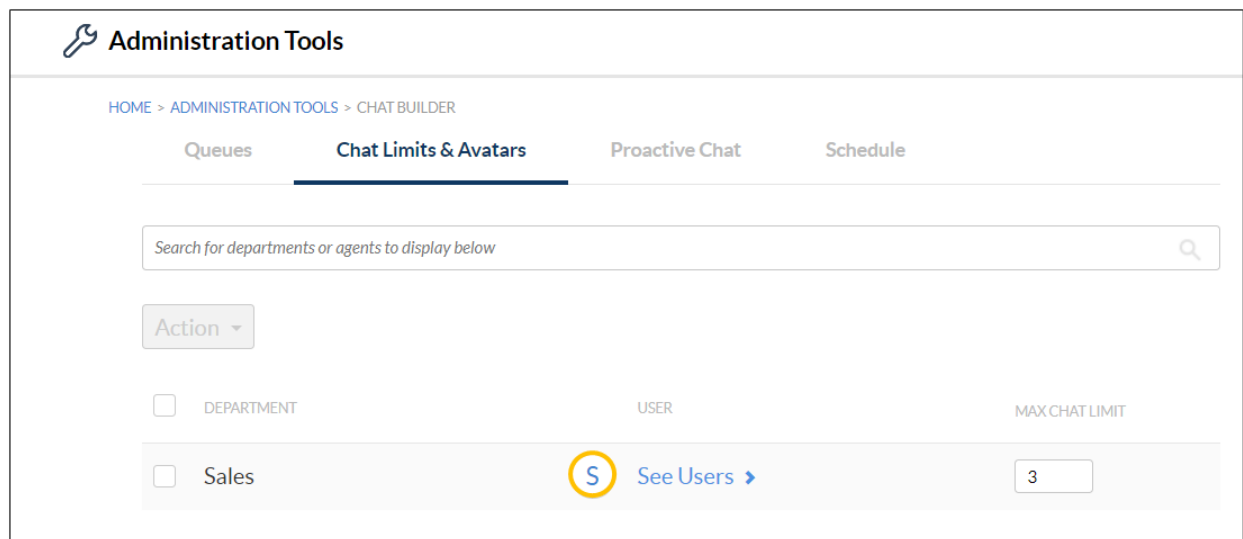
Applying Chat Avatars

A chat avatar is the User image displayed on the chat widget for website visitors. By default, every User's chat avatar is a circle with their first initial. Administrators can customize the chat avatars by applying:

- The same photo for all Users in a Team
- A different photo for each User in a Team
- The same photo in bulk (i.e. for Users across multiple Teams)

To upload the same photo for all Users in a Team:

1. Click the avatar in the User column for the desired Team.
2. In the **Edit the Avatar** dialog box, either drag and drop an image file to the center of the dialog box or click **Upload a Photo**.
3. Click **Apply**. Then click **Save and Continue**.



Uploading a Photo for All Users in a Team

To upload different photos for each User in a Team:

1. Click **See Users >** to expand the list of Users for the desired Team, then click the avatar for the desired User.
2. In the **Avatar** dialog box, either drag and drop an image file to the center of the dialog box or click **Upload a Photo**, then click **Apply**.
3. Repeat the steps for each User. Then click **Save and Continue**.

Administration Tools

HOME > ADMINISTRATION TOOLS > CHAT BUILDER

Queues **Chat Limits & Avatars** Proactive Chat Schedule

Search for departments or agents to display below

Action ▾

<input type="checkbox"/>	DEPARTMENT	USER	MAX CHAT LIMIT
<input type="checkbox"/>	Sales	See Users ▾	<input type="text"/>
<input type="checkbox"/>		john smith	<input type="text" value="5"/>
<input type="checkbox"/>		Kris Jacobson	<input type="text" value="3"/>

Uploading Photos for Each User

To upload a photo in bulk:

1. Select the checkboxes corresponding to the desired Teams or Users.
2. Click the **Action** button, then select **Edit User Avatars**.
3. In the **Bulk Edit External Chat Avatar** dialog box, either drag and drop an image file to the center of the dialog box or click **Upload a Photo**, then click **Apply**.
4. Click **Save and Continue**.

Administration Tools

HOME > ADMINISTRATION TOOLS > CHAT BUILDER

Queues **Chat Limits & Avatars** Proactive Chat Schedule

Search for departments or agents to display below

Action ▾

- Edit Max Chat Limit
- Edit User Avatars**

	USER	MAX CHAT LIMIT
<input checked="" type="checkbox"/>	Sales	<input type="text"/>
<input checked="" type="checkbox"/>	J john smith	<input type="text" value="5"/>
<input checked="" type="checkbox"/>	K Kris Jacobson	<input type="text" value="3"/>

Uploading Photo in Bulk

Enabling Proactive Chat

Proactive Chat allows businesses to automatically engage website visitors based on predefined conditions. For example, once a visitor has spent 60 seconds on a web page, a chat is initiated with an automated message. By enabling Proactive Chat, this Chat Queue will only be a proactive Chat Queue, meaning visitors cannot initiate a live chat.

1. Select the **Make this a proactive chat queue** checkbox.
2. From the **Condition** drop-down list, enter the following conditions:
 - a. **Time on Site** to engage visitors based on the amount of time they spend on a website. Enter a value (seconds) in the text box.
3. In the text box, enter the greeting to display to the visitor.
4. Click **Save and Continue**.

Administration Tools

HOME > ADMINISTRATION TOOLS > CHAT BUILDER

Queues Chat Limits & Avatars **Proactive Chat** Schedule

Proactive Chat

Make this a proactive chat queue
Proactive chat will automatically engage your visitors and invite them into a chat based on specific criteria you configure. This will only be a proactive chat queue.

If all of the following conditions are met:

CONDITION

Time on Site is equal to 60 seconds

Hi, is there anything I can help you with?

Enabling Proactive Chat

Setting Chat Queue Schedules

Set the schedule for Chat Queues to define when specific Chat Queues are available. If the schedule is not defined, the chat queue will remain offline. If a schedule is set, but there is no agent online to chat with the website visitor, then the live chat option will change to the offline chat option for the visitor to complete a form that creates a Case.

1. Select a time zone from the **Time Zone** drop-down list.
2. Select the checkboxes corresponding to the days of the week for the Chat Queue to be online. Then use the sliders to define a time frame. If desired, add multiple time frames per day. Use the green + icon to add time frames.

TIP: For multiple time frames, start with the latest time frame and work backward. For example, add 6:00pm – 9:00pm, then 1:00pm – 5:00pm, and then 6:00am – 12:00pm. Use the green – icon to remove time frames, starting with the latest time frame.

3. Click **Save and Continue**.

Administration Tools

HOME > ADMINISTRATION TOOLS > CHAT BUILDER

Queues Chat Limits & Avatars Proactive Chat **Schedule**

Queue Schedule

Create or edit a schedule for this queue.

TIME ZONE
US/Arizona

If a schedule is not created below, your queue will remain offline

Monday 7:00am - 12:00pm, 1:00pm - 6:00pm

Tuesday 7:00am - 3:00pm

Wednesday 7:00am - 9:00am, 10:00am - 12:00pm, 1:00pm - 6:00pm

Cancel Save and Continue

Chat Queue Schedule

Adding Nextiva Chat to Web Pages

The code for embedding Nextiva Chat on web pages is dynamically generated and updated during the Chat Queue creation process. To embed on a web page, copy the code and paste it into the HTML code of the web page. You can access the code at any time by clicking on the desired Chat Queue and selecting **Website Code** from the right panel.

1. Click **Copy Webcode**. Then click **Save and Exit**.

Administration Tools

HOME > ADMINISTRATION TOOLS > CHAT BUILDER

Code

```
<script defer name="next-chat" src="https://dev.dev.nextiva.xyz/apps/chat-js-apps/nextchat.js"
  { "nextivaChatConfig": "NmViNTcyYmMtNmZhYi0xMwVhLTlmM2ItMDA1MDU2YTMyZTYzfn4zMtG4Njc5" }
</script>
```

[Copy Webcode](#)

Install on other website providers:

Have a different provider and need some help with adding Nextiva Chat to your site? Try one of the setup guides below to get started.

Save and Exit

Website Code

Editing Chat Queues (Admin)

Administrators can edit Chat Queues to change the settings, or copy the code to embed Nextiva Chat on web pages.

1. From the **Manage Chat Queues** page, click the desired chat and select **Edit**.

Administration Tools

HOME > ADMINISTRATION TOOLS > CHAT BUILDER

Manage Chat Queues

Create New +

Queue Name	Department	Creation Date	Last Modified	Modified By
Sales	Sales	Mar 26th, 2020	Mar 26th, 2020	Kris Jacobson
Support		Mar 26th, 2020	Mar 26th, 2020	Kris Jacobson

Edit Chat Queues

Deleting Chat Queues (Admin)

Administrators can delete Chat Queues that are no longer needed. Be sure to remove the chat code from the web pages as well.

1. From the **Manage Chat Queues** page, click the desired chat and select **Delete**. Click **Confirm**.

Administration Tools

HOME > ADMINISTRATION TOOLS > CHAT BUILDER

Manage Chat Queues

Create New +

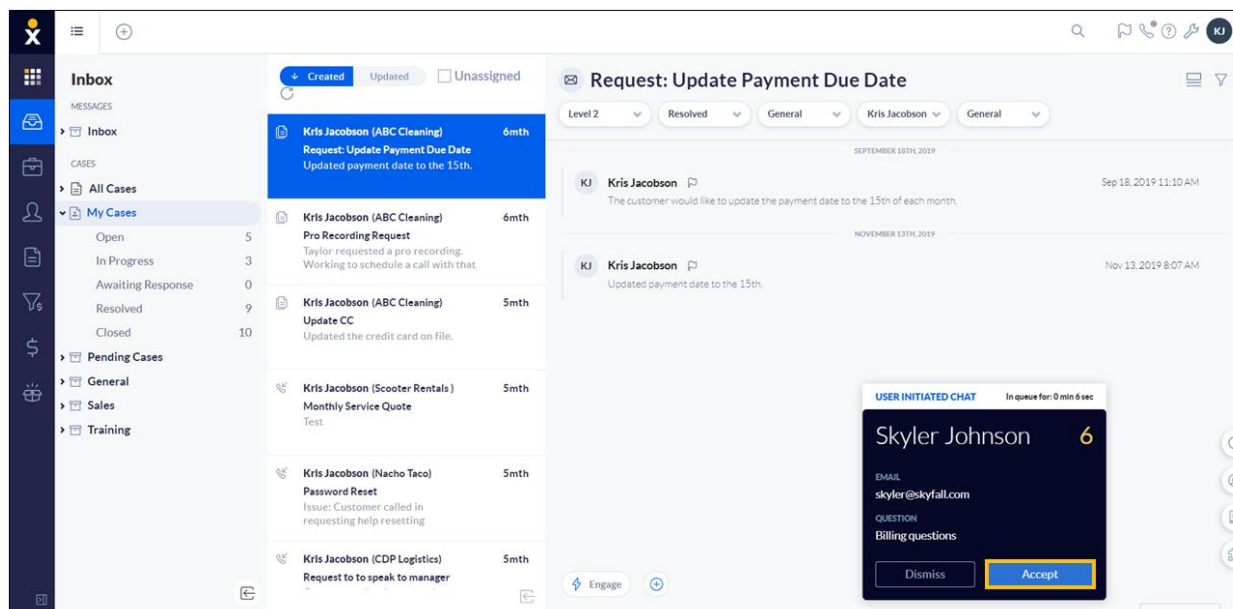
Queue Name	Department	Creation Date	Last Modified	Modified By
Sales	Sales	Mar 26th, 2020	Mar 26th, 2020	Kris Jacobson
Support		Mar 26th, 2020	Mar 26th, 2020	Kris Jacobson

Delete Chat Queue

Responding to Chats (User)

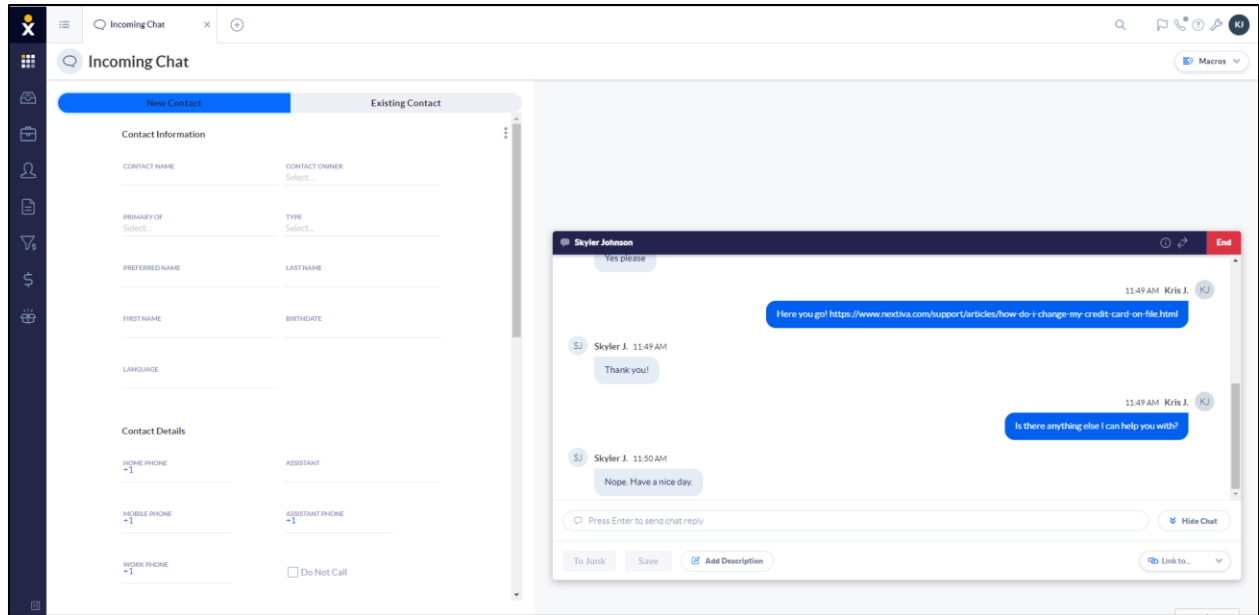
Nextiva Chat Users receive a Chat Pop in the bottom-right corner when a new chat arrives. The User must be signed into Nextiva CRM to receive incoming chats. The Chat Pop includes information about the visitor (name, email, question) and their wait time in queue. By default, Users have 10 seconds to accept or dismiss a chat before it automatically routes to the next available User assigned to the Chat Queue.

1. Click **Accept** in the Chat Pop to engage with the visitor.



Chat Pop

2. Type a message in the text box, and press **Enter** to send.
3. When done engaging with the visitor, click **End** to end the conversation.
4. Click the **Link to** drop-down and choose the record type (**Case, Contact, Account, Lead, Opportunity**) to associate the chat interaction with. For example, if you select **Contact**, you can choose to create a **New Contact** or add to an **Existing Contact**.
5. Click **Add Description** to add a description of the chat interaction.
6. Click **Save**.



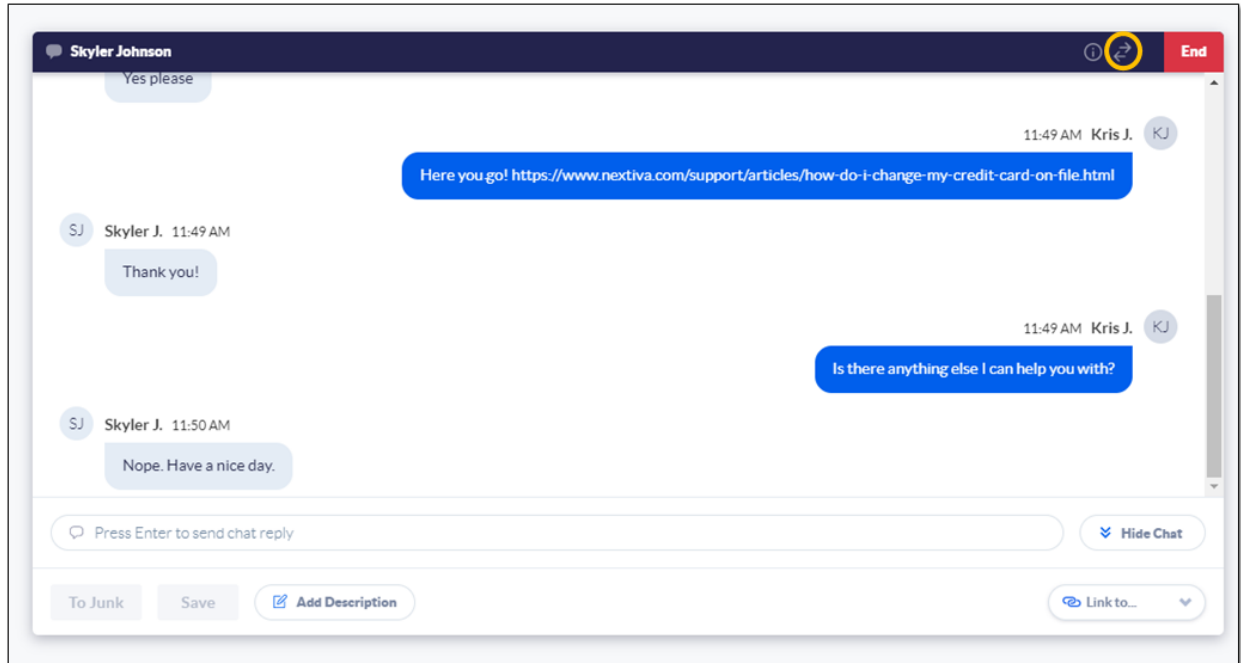
Chat Interaction

TIP: Click the **Info** icon on the top right corner of the Chat window to view any associated Contacts or Accounts.

Transferring Chats

Transfer Chats to other online agents in the Chat Queue.

1. While on a live chat, click the **Transfer** icon on the top right corner of the chat window and select the **Agent**.



Transfer Chat Option