

Nextiva Contact Center Admin Guide

Version 1.1



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Getting Started

Boost revenue, drive efficiency, and provide a seamless customer experience with Nextiva Contact Center. Meet your customers where they are with digital-first, frictionless omnichannel journeys. Reduce cost per contact through AI and automation, grow revenue with proactive outbound sales campaigns, and engage and develop teams to deliver exceptional CX with workforce engagement management.

Logging In

We recommend using Google Chrome web browser to ensure the best possible experience and avoid any potential issues or errors.

Visit nextiva.thrio.io and enter your email address and password. Click **Login**.

NOTE: If you have forgotten or lost your password, you can reset it by selecting Forgot Password. Follow the instructions provided in the email. The link will only be valid for 24 hours.

Language Options

You can change the language settings by clicking the **Flag** on the top right. Nextiva currently supports English, Spanish, French, and Portuguese.

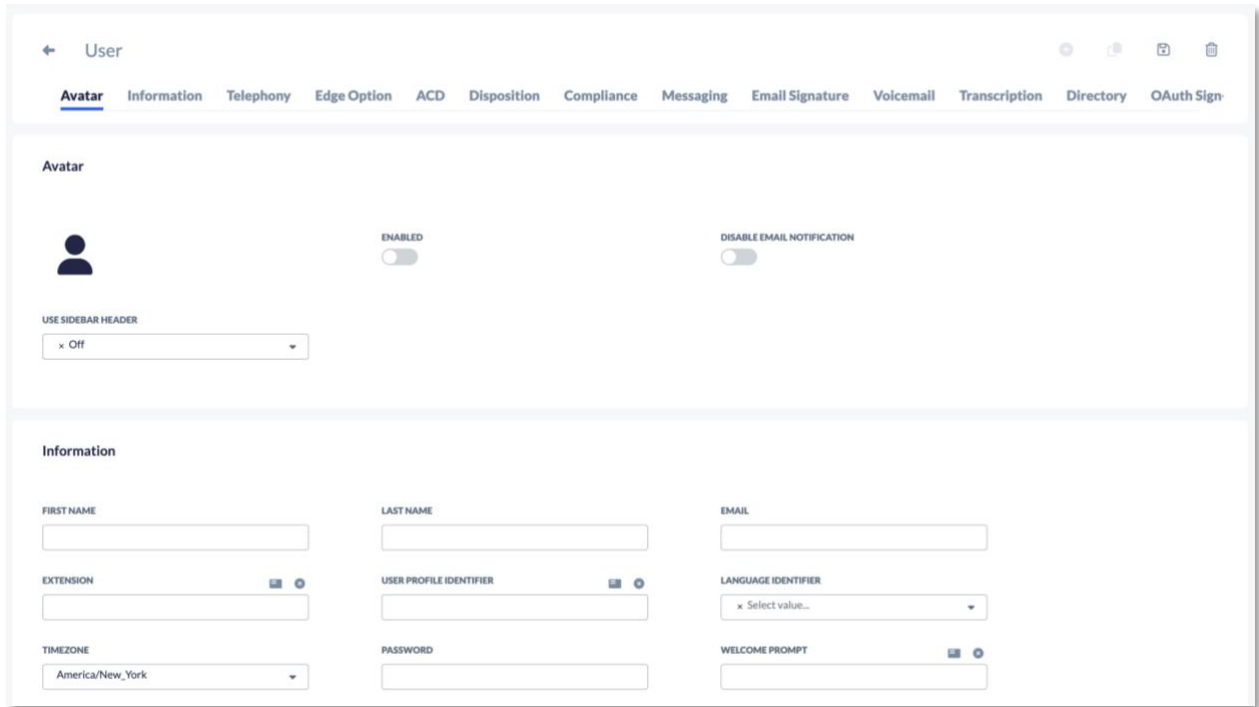
Users

Administrators handle user management in Nextiva Contact Center. Different users have distinct roles, interactions with objects, and permissions within the system. The three primary roles in Nextiva Contact Center are Agents, Supervisors, and Administrators.

- **Agents:** Agents interact directly with customers and other users via various workitems such as Chat, Email, Phone, and SMS. They can be assigned to specific campaigns and queues, assisting customers with any inquiries or issues.
- **Supervisors:** Supervisors oversee agents, manage queues, outbound lists, and workitems. They can monitor workitems in real time, assist agents on live workitems, and generate dashboards and reports for performance tracking.
- **Administrators:** Administrators have the authority to create users, campaigns, queues, recordings, voicemail, and several other system settings.

Creating Users

Search for the **User** icon in the Options Menu. Click **Plus (+)** to the right of the Search field. Enter the required information under each tab.



Avatar Tab

The uploaded photo will be visible to other users in the company directory and the list of users. To upload a photo (less than 100KB), click the default Avatar and select the image.

Toggle Button	Description
Enabled	If enabled, the user can log in to Nextiva Contact Center.
Disable Email Notification	By default, an email will be sent once a user is created to create a password. If disabled, the email will not be sent.

Information Tab

Enter the user details under the information tab, including the option to reset the user's password.

Field Name	Description
First Name	The first name of the user.
Last Name	The last name of the user.
Email	A valid email address for the user. The email address must be valid, as this address will be used to send the user a link for the creation process. The email address will also be used to send the user voicemails.
Extension	The user's phone extension. This is important if your call flow will allow callers to enter an extension number to reach a particular user.
User Profile Identifier	Assign the user a profile (Administrator, Agent, Supervisor). The profile determines the user's access. You can only select one profile for each user.
Language Identifier	The user's preferred language (English, French, Portuguese, or Spanish).
Time zone	The user's time zone.
Password	Create the password for the user to log in to the system. NOTE: An email is sent to the user to create a password, but a supervisor can use this field to overwrite that password.
Welcome Prompt	The welcome prompt is played to the agent when the user logs in. The prompt can be uploaded here manually or in the user profile.

Telephony Tab

The Telephony tab is where to configure how the system will communicate with the user.

Field Name	Description
Use Endpoint	If enabled and set up to use an endpoint, there will be a pop-up to select the phone device attached to their work area.
Phone Type	Where you configure the phone type (PSTN, SIP, and WebRTC), the user will use when making or receiving calls.
Number	Your PSTN phone number so that the system knows where to reach you. NOTE: Users can use multiple devices, one being their PSTN.

Work Offhook	If enabled, the system will call you once and keep you active throughout the day. Available for SIP, WebRTC, and PSTN phone types. This is useful for predictive, so the user doesn't need to be called repeatedly.
Confirm Dial	If enabled, Nextiva displays a "Confirm Dialing" pop-up with the phone number. Click inside the box to dial and click outside to cancel.
Twilio Edge ID	Allows you to choose the closest Twilio node to you from the drop-down list.

Edge Option Tab

Field Name	Description
Twilio Edge ID	For calls that do not go through Twilio, selecting a specific Edge closest to the agent's physical location will improve the quality of their calls. On Twilio, it is detected automatically.
Region	The region assigned to the agent (if applicable).

ACD Tab

The ACD (Automatic Call Distributor) is an automatic workitem distributor offering workitems to agents.

Field Name/Toggle Button	Description
Allow ACD Changes	If users can change their ACD settings, they can enable or disable Auto Accept Workitem, Auto Login to ACD, and ACD Login Status. The user can also decide which queues to log into and which channels to log into. By default, Allow ACD Changes is disabled.
Auto Accept Workitem	If enabled, the user will no longer be required to accept ACD workitems. As soon as the work item is offered, the workitem will become active. A user working OffHook and has auto-accept enabled will connect to each subsequent call without having to accept or pick up the phone.
Auto Login to ACD	If enabled, this user will be automatically logged into the ACD every time they log in to Nextiva Contact Center. If Auto Login To ACD is not enabled, the user must take the extra step to log in to the ACD and select a queue, channels, and status.

ACD Login Status	This allows you to choose the status of this user when they first log in to the ACD. For example, if you want the user to start receiving workitems immediately, you would select an available status.
Ring Phone on ACD Offer	If enabled, users with this profile's phone will ring when receiving ACD offers.

Disposition Tab

At the end of every workitem, a user can choose a disposition. Dispositions can be assigned by campaign and by workitem type. They allow the user to classify the workitem.

Field Name	Description
Disable Disposition	If enabled, the system will auto disposition every workitem.
Auto Disposition	Disposition workitems automatically from an agent's screen when they are in wrap-up for an amount of time established in the "Wait time before Auto Disposition" option below.
Wait Time before Auto disposition	The time to wait before a terminated workitem is auto dispositioned.
Enable Disposition Notification	The pop-up warning notifies them they haven't dispositioned a workitem.
Delay Notification after	How long to wait before providing the Disposition Notification.

Screen Recording Tab

If enabled, when an agent is on a call and the call is being recorded, Nextiva will record the agent's screen and keep a video recording of what was happening on the agent's screen during the call.

Compliance Tab

The Compliance tab ensures compliance with company policy, tenant consent, and call hours.

Toggle Button	Description
Legal Hours	If enabled, every time this user attempts to make an outbound call, the system will verify if the area code is being dialed within the list of hours allowed to be called.
Tenant Consent	If enabled, the system will verify if the phone number exists in the local consent database. The system will warn the user if the consent type is set to DNC, Opt-out, or reassigned.
Verify Consent on SMS	If enabled, the phone number receiving the SMS must be explicitly created in the Consent table with opt-in or opt-in SMS. If Verify Consent on SMS is disabled, the SMS will be sent without verifying against the consent table.
Disable Start Recording	If enabled, the user cannot start recording a call.
Disable Stop Recording	If enabled, the user cannot stop recording a call.

Messaging Tab

Set up a pseudonym and custom message that will be displayed to customers via chat.

Field Name	Description
Pseudonym	A fictitious name will be displayed to customers when they chat with this user. The system will display the user's first name if no pseudonym is entered.
Chat Welcome Message	A message will be displayed to customers when this user accepts a new chat.

Shelf AI Agent Assist Tab

If you have an integration with Shelf AI, you need to have the user's ID in the configuration that is using Shelf AI. If you have live transcription enabled, it gets passed to Shelf AI, which can recommend how to respond to the user. This can be done with any workitem with live transcription enabled.

Email Signature Tab

Add a signature that will automatically be added to outbound email workitems.

Voicemail Tab

Field Name	Description
Voicemail Greeting	You can listen to the user's voicemail greeting by selecting the Speaker icon. Click the ellipses to upload a voicemail greeting for this user.
Voicemail Drop	The default voicemail message.
Default Disposition On Voicemail	The disposition is used when a customer reaches the agent's voicemail.

Transcription Tab

Field Name	Description
Enable Realtime Transcription	Integration with third-party services like Deepgram and Google Generative AI can be enabled or disabled from here.
Percentage of the maximum minutes	Percentage of transcription minutes assigned to this user from the total tenant minutes.

Directory Tab

Choose to hide the user from the Auto Attendant so customers cannot find their direct line via IVR. You can also hide the user from the company directory, so they are not visible to other users on the account.

OAuth Sign-In Tab

OAuth allows Nextiva to grab roles and queues from an external system following the OAuth protocol.

Field Name/Toggle Button	Description
Profile Assignment From External Role	The fieldname in the external system where the role of the user is found.
Queues Assignments	The fieldname in the external system where the list of queues the user is assigned to is found.

Tracing Tab

Enable logging for troubleshooting purposes.

Toggle Button	Description
Enable Client Side Logging	If enabled, the browser will display more data in the JavaScript console.
Enable Server Side Logging	The server logs will capture more data about this user's transactions if enabled.

Home Tabs Tab

Assign home tabs for the user to access quickly. Click **Plus (+)** and select the home tabs to assign. Click **OK**.

Queues Tab

Assign the user to queues by clicking **Plus (+)** and selecting the queues to assign. Click **OK**.

Skills Tab

Assign skills to the user by clicking **Plus (+)** and selecting the skills to assign. Click **OK**.

Supervised Queues Tab

Select queues that a user will supervise by clicking **Plus (+)** and selecting the queues to manage. Click **OK**.

Supervised Users in Queue Tab

To supervise all the users in a selected queue, click **Plus (+)** and select the queue. Click **OK**.

Supervised Users Tab

To select individual users for the user to supervise, click **Plus (+)** and select the users. Click **OK**.

Supervisors Tab

The Supervisor's tab is a list of users that are supervising a user. Click **Plus (+)** and select the users you want to supervise the user. Click **OK**.

Supervised Campaigns Tab

The Supervised Campaigns tab allows you to select campaigns for a user to supervise. Click **Plus (+)** and choose the campaigns. Click **OK**.

User Profiles

User Profiles in Nextiva Contact Center are essential for assigning permissions and roles to different types of users. They allow Administrators to efficiently control what features and capabilities are available to each user, enhancing both security and operational efficiency.

Creating a User Profile

Search for the **User Profile** icon in the Options Menu. Click **Plus (+)** to the right of the Search field. Enter the required information under each tab.

Information Tab

Field Name	Description
Name	The name of the User Profile.
Description	The description of the User Profile.
Authority Set Identifier	The Authority Set that you wish to associate this user profile with.

Options Tab

Toggle Button/Slider	Description
Welcome Prompt	A welcome message is played to users when they log in to the application.
Password Rule	The password rule that should be applied to this user profile.
Show Web RTC Notification	Web RTC notifications will be displayed to users with this profile if enabled.
Ring Phone on ACD Offer	If enabled, users with this profile's phone will ring when receiving ACD offers.
Ring Logged Out Agent's Phone	If enabled, users' phones with this profile will ring when logged out.
Enable screen recording	If enabled, users with this profile will have the workitems screen recorded.
Dual View	If enabled, a user will see a split-screen view.
Enable Changing View	If enabled, it allows a user to switch between the dual and normal views. NOTE: Enable Changing View will appear after enabling the Dual View toggle.

Transcription Tab

Field Name	Description
Enable Realtime Transcription	If enabled, Realtime Transcription will automatically be enabled for all users assigned to this user profile.
Percentage of the maximum of minutes	Percentage of transcription minute assigned to users of this profile from the total tenant minutes.

Auto Disposition Tab

Field Name	Description
Disable Disposition	If enabled, the system will auto disposition every workitem.
Auto disposition	Automatically disposition workitems from an agent's screen when they are in wrap-up for a specified time.
Wait time before auto disposition.	The amount of time in wrap-up that an item will wait in before it is auto dispositioned.

Confirm disposition	If enabled, a pop-up confirmation message will be sent whenever a user disposition a workitem. They will be asked to confirm the disposition.
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ACD Tab

Field Name	Description
Auto Login to Queues	All users assigned to this user profile will automatically be logged in with the status that is configured in their user object.
Wait time before auto disposition	The amount of time in wrap-up that an item will be in before it is auto dispositioned.
Offer Timeout in Seconds	The amount of time the agent waits to accept a workitem before the workitem returns to the queue and is set to No Answer.

Outbound Tab

Toggle Button	Description
Allow campaign selection	Users with Allow campaign selection disabled will be logged into the predictive/progressive campaign corresponding to their group. If enabled, they will be able to choose which campaign.
Allow override	When a consent warning is shown, the user will be given the option to proceed with the call, SMS, or email.
Prevent Manual Outbound on ACD Offer	When a consent warning is shown, the user will be given the option to proceed with the call, SMS, or email.

Auto Dial Tab

Toggle Button	Description
Auto Dial in Review	Automatically dials a lead in progressive mode when the preview is presented to the agent. This saves the agent from having to click to dial.

Edge Option Tab

Field Name	Description
Twilio Edge ID	The region and city that Twilio will use to send the SIP calls through. This improves the quality of the call the closer it is to the agent's SIP address.

Region	The region assigned to the Agent (if applicable).
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Shelf AI Agent Assistant Tab

If you have an integration with Shelf AI, you need to have the ID of the user in the configuration that is using Shelf AI. If you have live transcription enabled, it gets passed to Shelf AI, and Shelf AI can pass recommendations on how to respond to the user. This can be done with any workitem with live transcription enabled.

The OAuth Tab

Field Name	Description
External Identifier	The field name to identify the user profile in an external system.

Channels

A channel is a way to communicate with customers. The types of channels are Chat, Email, Fax, SMS, Social, and Voice. Each channel has the following fields:

- Enable/Disable: If enabled, the user will be able to receive workitems for the channel type from the ACD.
- Priority: If work items from all channels enter the system at the same time, they will be distributed in the order of highest priority to lowest. The channel with the highest priority will receive those workitems of that channel first.
- Simultaneous Limit: The maximum number of work items the users can be offered simultaneously from this channel.
- Support Multi-tasking: If enabled, the user can receive workitems from other channels while working on this one.

Call Notifications Tab

Toggle Button	Description
Call Failed	Display a notification message to the user when a call fails for unknown reasons.
Call Permission	Display a notification message to the user when a call fails due to a permissions issue.
Call Unavailable	Display a notification message to the user when a call fails due to unavailability reasons such as outbound hours.
Call Network	Display a notification message to the user when a call fails for network reasons.
Call Busy	When a call reaches a busy line, display a notification message to the user.

Call Complete	Display a notification message to the user when a call is completed (terminated).
Call No Answer	Display a notification message to the user when a call fails due to the customer not answering.
Enable Call Connect Notification	Display a notification when a call connects.
Enable Call Ringing Notification	Display a notification when a call is ringing.

First Party Skill Tab

Toggle Button	Description
Notify User about Lead Status	The user is logged into a progressive campaign using First Party Skills if enabled. If no leads are presented to the agent, the agent will receive a pop-up message telling them there are currently no leads available.

Home Tabs

A home tab is one or multiple views of a selection of widgets. This is where users are assigned the widgets that will appear on their home page at the User Profile level.

NOTE: Home tabs specified on the user level will supersede the ones assigned at the profile level.

Adding/Removing Dashboards

Where real-time dashboards are assigned, a user with this profile can see the data related to the campaigns, queues, and users they supervise.

Google Looker Studio

The Google Looker Studio tab is where Google Looker Studio reports are assigned.

The Dispositions Tab

A disposition assigned to the user profile is a subset of the dispositions assigned to the campaign. For example, if the campaign has ten dispositions (A, B, C, D, E, F, G, H, I, J), and the user profile has 5 (A, B, C, D, E), then only A-E will be presented to the user when dispositioning a work item.

If the campaign has five dispositions assigned (C, D, E, F, G) and the user profile has 5 (A, B, C, D, E), when the user dispositions a workitem from this campaign, only the union of the two lists will be shown C-E.

If there is no union, the entire list of dispositions is presented. If there are no possible dispositions on the user's UI, they will be stuck with that workitem on their screen and unable to access any other ACD workitems. They can handle non-ACD workitems, but the undispositioned workitems will stack up on their UI until someone fixes the bad configuration.

Teams Presence Sync Tab

The Teams Presence Sync Tab allows statuses in Microsoft Teams to be changed in Nextiva and vice versa.

NOTE: The names of the statuses in Nextiva must match the names of the statuses in Microsoft Teams.

Toggle Button	Description
Sync Presence to Teams	If enabled, a status change in Nextiva will automatically change in Microsoft.
Sync Presence to Nextiva	If enabled, a status change in Microsoft will automatically change in Nextiva.

Auto Login Tab

The Auto Login Tab allows users with a specific profile to auto-log into either Predictive or Progressive mode when logging into Nextiva. Administrative users can configure the auto-login type depending on the profile, including if it's done by a Group or for a specific Campaign.

Field Name	Description
Auto Login	Which Auto login should be used for the profile.

If Predictive or Progressive are chosen in the Auto Login Field, you will see the Auto Login Type fields, where you can select auto-login with a campaign or group. Then, you will see the Campaign or Group field based on the previous selection.

Entities

Entities in Nextiva Contact Center are subjects identified by Google's Natural Language Processing (NLP) service. These entities can be extracted from transcribed calls and text workitems, allowing them to be processed immediately. By utilizing entities, you can modify their importance for specific campaigns and queues across all workitems. This helps in reporting and developing trends, ensuring that certain subjects are given appropriate weight in analysis and decision-making processes. The Entity object can increase or decrease the importance of these detected entities by campaign, enhancing the relevance and accuracy of your data insights.

Creating Entities

Search for the **Entity** icon in the Options Menu. Click **Plus (+)** to the right of the Search field. Enter the required information under each tab.

Information Tab

Enter the name and description of the entity.

Campaigns Tab

Choose the campaign(s) to associate with the entity. The “Boost” column displays the importance of the entity. Hover over and select the **Ellipses** to edit the importance. Numbers less than 1 reduce the importance, and larger than 1 increase it. If you choose 0, then it will be removed altogether. A single entity may have different boost values in different campaigns.

Queues

Customers waiting to connect with an agent are placed in a queue, which holds these interactions until they can be answered. Queues are essential for ensuring that calls and messages are handled in an orderly manner, prioritizing customer satisfaction by reducing wait times and improving response efficiency.

Creating a Queue

Click **Plus (+)** to the right of the Search field. Enter the required information under each tab.

The screenshot shows a web interface for configuring a queue. At the top, there is a breadcrumb trail: "Queue - IL - Queue". Below this is a horizontal menu with several tabs: "Information", "Real Time", "Company Directory", "Agent Assignment", "Play Announcement", "SLA", "Blended Queue", "Email Working Hours", "Skills Filter", and "Users". The "Information" tab is currently selected and highlighted. Under the "Information" tab, there are four input fields: "NAME" (containing "IL - Queue"), "DESCRIPTION", "ENABLE NO ANSWER AS AVAILABLE" (a toggle switch that is currently off), and "AGENT TO CALL RATIO". Below the "Information" tab is the "Real Time" tab, which contains two toggle switches: "ENABLE REALTIME CHANGES" (which is currently on) and "ENABLE REAL TIME DATA" (which is currently off).

Information Tab

Field Name	Description
Name	The name of the queue.
Description	The description of the queue.
Enable No Answer as Available	If enabled, No Answer statuses will automatically switch to available for agents in the queue. Statuses will also switch when agents miss workitems in the queue.
Agent to Call Ratio	The number of calls allowed in the queue is based on the number of agents.

Real Time Tab

Field Name	Description
Enable Realtime Changes	If enabled, any user assignment will happen dynamically in real-time. If disabled, the assignment will only take effect when the agent logs in.
Enable Realtime Data	If enabled, the queue information will be sent to the workflow in real time. This is used to see the Estimated Wait Time for queues or the caller's position in the queue.

Company Directory Tab

Field Name	Description
Hide In Company Directory	If enabled, the queue will be hidden in the company directory.

Agent Assignment Tab

The Agent Assignment tab is where the type of workitem delivery to be used in the queue is specified. Typically, workitems are delivered based on skill-based routing and Sticky Agent. The Agent Assignment is applied whenever multiple agents are available for a call. The types available are:

Field Name	Description
First In First Out Across All Queues	The agent that has been waiting for a workitem offer for the longest amount of time across all queues will get the workitem.
First In First Out By Status	The agent with their status as Available for the longest time will get the workitem.

First In First Out Per Queue	The agent waiting for a workitem offer for the longest time in this specific queue will get the workitem.
Last In First Out Across All Queues	The agent waiting for a workitem offer for the least time across all queues will get the workitem.
Last In First Out By Status	The agent with their status as Available for the least amount of time will get the workitem.
Last In First Out Per Queue	The agent waiting for a workitem for the least amount of time in this specific queue will get the workitem.

NOTE: If a workitem is routed to multiple queues, and one of the queues uses one of the Agent Assignment Types by Status, that Assignment type will supersede any other Agent Assignment type.

Play Announcement Tab

Field Name	Description
Prompt	Plays an announcement to the agent when the agent receives a workitem from the queue.

SLA Tab

SLA stands for Service Level Agreement. A threshold target (in seconds) for which the workitems should be answered. It is used in the SLA calculations to find a percentage of workitems that meet the target for this queue. There can be SLAs for the following:

- Voice
- Chat
- Email
- Social
- SMS

Three possible SLA calculations can be selected.

SLA	Calculation
SLA 1	$(\text{Ans in Threshold} + \text{Drop in Threshold}) / \text{All}$. Shows the percentage of calls that met the threshold or were dropped out of the total number of calls.
SLA 2	$(\text{Ans in Threshold} / \text{All})$. The percentage of calls that meet the threshold.
SLA 3	$(\text{Ans in Threshold} / \text{Ans} + \text{Drop After Threshold})$. The number of calls that met the target to those that didn't.

Blended Queue Tab

If enabled, this queue is now a blended queue across all campaigns. The blended queues need to be used on a 1:1 ratio. A user in a blended queue will only receive inbound calls for the outbound campaign they're logged into. If you want the inbound calls to overflow from a blended queue to a non-blended queue, you must have an Exit Queue action in the workflow before you enter the non-blended queue.

NOTE: The workflow using a blended queue must be associated with the predictive campaign that the user is logged into.

Email Working Hours Tab

Field Name	Description
Email Working Hours	For email working hours, you need to select a Business Event. Nextiva Contact Center calculates how long a workitem is in the queue before being answered based on the time events assigned. Nextiva calculates service levels based on the queue's open hours.

Skills Filter Tab

Field Name	Description
Disable Skills	If enabled, all calls routed to the queue ignore the skills for routing.

Users Tab

Add users to the queue to accept workitems by clicking **Plus (+)** and selecting the users to add to the queue.

Supervisors Tab

Add supervisors to monitor the queue by clicking **Plus (+)** and selecting the supervisors to add to the queue.

Campaigns

A campaign is a structured set of rules and configurations designed to address specific customer needs by organizing queues, agents, workflows, bots, and other capabilities. Campaigns play a crucial role in supporting various activities, including outbound operations such as progressive dialing. When participating in an outbound campaign, agents will receive screen pop-ups with detailed contact information about the next call, facilitating smoother and more informed interactions.

Campaign Types

Nextiva offers several types of campaigns to address different communication needs:

- **Inbound Campaigns:** Manage workitems coming into Nextiva.
- **Outbound Campaigns:** Handle workitems originating from Nextiva.
- **Blended Campaigns:** Combine inbound and outbound capabilities.
- **Email Campaigns:** Specifically manage email communications.
- **SMS Campaigns:** Focus on handling SMS interactions.
- **Chat Campaigns:** Cater to chat-based customer service.

Creating a Campaign

Search for the **Campaign** icon in the Options Menu. Click **Plus (+)** to the right of the Search field. Enter the required information under each tab.

The screenshot shows the 'Campaign - Company Support Line' configuration page. The 'Information' tab is active, displaying three input fields: 'IDENTIFIER' with the value '65ce31f4b306787996e4010b', 'NAME' with the value 'Company Support Line', and 'DESCRIPTION' which is empty. Below this is the 'General Configuration' section with three fields: 'CAMPAIGN GOALS' (empty), 'MUSIC URL' (a dropdown menu showing 'x Select value...'), and 'MUSIC LIBRARY' (empty). The 'Surveys' section contains three fields: 'USER SURVEY' (empty), 'CUSTOMER SURVEY' (with the value 'Group 09 - Chat - Customer Survey'), and 'QUALITY MONITORING SURVEY' (empty). The top navigation bar includes tabs for 'Information', 'General Configuration', 'Surveys', 'Options', 'Inbound Numbers', 'Inbound Group Numbers', 'Inbound Email', 'Campaign Call ID', and 'Dial Plans'.

Information Tab

MANDATORY FOR: All Campaigns.

Field Name	Description
Identifier	A unique numeric identifier of the campaign.
Name	The name of the campaign.
Description	A description of the campaign.

General Configuration Tab

OPTIONAL FOR: All Campaigns.

Field Name	Description
Campaign Goals	Used to inform users of the expected number of workitems to handle every 24 hours. An administrator sets this goal, and agents can see their progress on their home screens.
Music URL	Default music played when a call is placed on hold.
Music Library	Default music library for music on hold.

Surveys Tab

OPTIONAL FOR: All Campaigns.

Field Name	Description
User Survey	The user survey that is associated with the campaign.
Quality Monitoring Survey	The survey that appears when reviewing a survey in history.
Customer Survey	The survey a customer would access via the web.

Options Tab

MANDATORY FOR: Inbound and Outbound Campaigns.

Toggle Button	Description
Use For Extension Dialing	If enabled, this specific campaign will be the default campaign for extension dialing.
Use For Outbound Dialing	Must be enabled for outbound campaigns.
Default for Outbound Dialing	The campaign will be used for outbound dialing if an agent hasn't specified a default campaign in their user settings.
Default for Extension Dialing	Used for agent-to-agent dialing.
Use for Progressive Dialing	Must be enabled for progressive campaigns.
Use for Fax	Must be enabled for fax campaigns.
Use for SMS	Must be enabled for fax campaigns.
Use for Email	Must be enabled for email campaigns.

Inbound Numbers Tab

MANDATORY FOR: Inbound Voice Campaigns, if there are no numbers in the Inbound Numbers Tab.

This is where the numbers for customers to dial are added. Select a list of Address Identifiers for the Campaign.

Inbound Group Numbers Tab

NOTE: The **Use For Progressive Dialing** toggle button in the Options Tab must be enabled to see this tab.

Add the inbound group numbers to be dialed. Click **Plus (+)**, and select the number. Click **Ok**.

Inbound Email Tab

MANDATORY FOR: All Email Campaigns.

Field Name	Description
Email Account	The email address assigned to a campaign.

Campaign Call ID Tab

MANDATORY FOR: Outbound Voice Campaigns.

Field Name	Description
Number	If you want the number displayed to customers to look like a local call, you can enter the state DID.
State DID	If you want the number displayed to customers to look like a local call, you can enter the state DID.
Outbound ANI	Enable if you want to use the Outbound ANI integration, which allows outbound ANI requests to use numbers, from a customer's system.

Dial Plan Tab

NOTE: The **Use For Progressive Dialing** toggle button in the Options Tab must be enabled to see this tab.

Select the dial plan for the campaign. Click **Plus (+)** and select the dial plan. Click **Ok**.

Campaign Auto Disposition Tab

Configure auto disposition to occur per campaign instead of per user.

Field Name	Description
Wait Time before Auto Disposition	The wait time before the auto disposition happens.

Auto Disposition	The Auto Disposition for the campaign.
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Dispositions Tab

NOTE: The **Use For Progressive Dialing** toggle button in the Options Tab must be enabled to see this tab.

Select dispositions to be associated with the campaign. Click **Plus (+)** and select the disposition. Click **Ok**.

Chat Options Tab

MANDATORY FOR: Inbound Chat Campaigns.

Field Name	Description
Keep Alive	The number of seconds it takes for the workitem to stay open after somebody has closed the chat.
Mobile Keep Alive	The number of seconds it takes for the workitem to stay open after somebody closes the chat on a mobile phone.

Scripts Tab

NOTE: The **Use For Progressive Dialing** toggle button in the Options Tab must be enabled to see this tab.

Select scripts to be associated with the campaign. Click the **Plus (+)** and select the scripts. Click **Ok**.

Lists Tab

NOTE: The **Use For Progressive Dialing** toggle button in the Options Tab must be enabled to see this tab.

Select the lists of leads to be associated with the campaign. Click the **Plus (+)** and select the list. Click **Ok**.

Dialer Configuration Tab

NOTE: The **Use For Progressive Dialing** toggle button in the Options Tab must be enabled to see this tab.

Field Name	Description
Enable Quarterback Mode	Select if you want No Quarterback, Quarterback Agent, or Quarterback Application.
Group	The group of users to be assigned to the campaign.
Max Dial Ratio	The max dial ratio to be used by the campaign.

Agents Available for Inbound	The amount of agents that should be available for an inbound call.
Field Mappings	What field mappings will be used for the campaign.
Abandon Percentage	The abandon percentage to be used by the campaign.
No Answer Timeout	How long Nextiva will wait before considering an attempt on a lead as No Answer.
REST API	Select a REST API to use at the beginning of the dialing process.

Answering Machine Detection Tab

NOTE: The **Use For Progressive Dialing** toggle button in the Options Tab must be enabled to see this tab.

Answer Machine Detection is an exclusive configuration for Predictive and QuarterBack Mode outbound dialing. It allows the administrator to fine-tune the timers associated with the dialer detection (Human/Machine). Nextiva’s outbound detection can include actions or downstream processes similar to the Dispositions. So, depending if the detection was Human, Busy, No Answer, Dialer Abandon (human connected but no agent available to take the call), Answer Machine, Invalid Number, or Fax, Nextiva can define that the best next action is to schedule a call back in 30 minutes, update a record on a third-party entity, or trigger an entirely new workflow as an example.

Field Name	Description
AMD Timeout	The number of seconds that Nextiva should attempt to perform answering machine detection before timing out and returning unknown. Increasing the value will provide the engine more time to decide.
Machine Detection End Speech Threshold	The number of milliseconds of silence after speech activity, at which point the speech activity is considered complete. Increasing this value will address the short voicemail greeting scenarios better. For short voicemails, there generally is 1000-2000 ms of audio followed by 1200-2400 ms of silence and additional audio before the beep. Increasing the MachineDetectionSpeechEndThreshold to ~2500 ms will treat the 1200-2400 ms of silence as a gap in the greeting but not the end of the greeting, resulting in machine detection. The downsides of such a change include Increasing the delay for human detection by the amount you increase this parameter, e.g., A change of 1200 ms to 2500 ms increases human detection delay by 1300 ms. Cases where a human has two utterances separated by a period of silence (e.g., a “Hello,” then 2000 ms of silence, and another “Hello”) may be interpreted as a machine. Decreasing this value will result in faster human

	detection. The consequence is that it can lead to increased False Human (detected human, actual machine) detections because a silence gap in a voicemail greeting (not necessarily just in short voicemail scenarios) can be incorrectly interpreted as the end of speech.
AMD Unknown as Answering Machine	If enabled, all unknowns will be considered answering machines; otherwise, they will be considered humans.
Machine Detection Initial Silence Timeout	The number of milliseconds of initial silence, after which an unknown result will be returned. Increasing this value will result in waiting for a longer period of silence before returning an 'unknown' AMD result. Decreasing this value will result in waiting for a shorter period of initial silence before returning an 'unknown' AMD result.
Machine Detection Speech Threshold	The number of milliseconds that are used as the measuring stick for the length of the speech activity. A duration lower than this value will be interpreted as a human and longer as a machine. Increasing this value will reduce the chance of a False Machine (detected machine, actual human) for a long human greeting (e.g., a business greeting) but increase the time it takes to detect a machine. Decreasing this value will reduce the chances of a False Human (detected human, actual machine) for short voicemail greetings. The value of this parameter may need to be reduced by more than 1000ms to detect very short voicemail greetings. A reduction of that significance can result in increased False Machine detections. Adjusting the Machine Detection Speech End Threshold is likely the better approach for short voicemails. Decreasing Machine Detection Speech Threshold will also reduce the time it takes to detect a machine.

Lead Options Tab

NOTE: The **Use For Progressive Dialing** toggle button in the Options Tab must be enabled to see this tab.

Specify the percentage of new leads, callbacks, and third-party callbacks.

Field Name	Description
Min number of leads in memory	The minimum number of leads to keep in memory.
Max number of leads in memory	The maximum number of leads to keep in memory.
Percentage of Agent Callbacks	The percentage of agent callbacks.
Percentage of Third Party Callbacks	The percentage of third-party callbacks.

Percentage of New Leads	The percentage of new leads.
Percentage of All Callback Types	The percentage of all callback types
Time Between Alternate Phone Numbers (sec)	The time before switching between alternate phone numbers.
Primary Phone Field	The primary phone number to be used when dialing leads.

Lead Attempts Tab

NOTE: The **Use For Progressive Dialing** toggle button in the Options Tab must be enabled to see this tab.

The Lead Attempts Tab allows you to specify attempts on leads.

Field Name	Description
Max Attempts per Address	The max attempts per address.
Daily Max Attempts	The daily max attempts.
Max Attempts	The max attempts. 0 or less means this functionality is not enabled. Any value over 0 will cause it to take effect.
Delay For	A delay before starting the Max Attempts.
Max Daily Attempts for Outbound Calls	The max daily attempts for outbound calls.

Lead Filters Tab

NOTE: The **Use For Progressive Dialing** toggle button in the Options Tab must be enabled to see this tab.

Field Name	Description
Filter	The tab to select the filter used for the campaign to decide which leads should be called. For example, you can create a filter for California that contains all the California prefixes and assign it to a campaign so that the system can only call California numbers.
Field used to Prioritize Leads	When you upload a list, a priority needs to be assigned to each lead in a field on the list. That field must be associated with the Field mapping. You then assign that field in the outbound campaign so the system knows which field to access to prioritize the leads.
Filter Leads by Number of Days	When you select the number of days, the system will filter out any uploaded leads before the number of days selected.

Partition Count Field	Using a field that's in the uploaded list. For example, you might use the State field, state=CA. If state = CA, then the Nextiva partition field count = 100. Nextiva will only load 100 leads that have CA in the State field at a time.
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Third Party Skills Tab

NOTE: The **Use For Progressive Dialing** toggle button in the Options Tab must be enabled to see this tab.

Specify how Third-Party Skills will be handled in the campaign.

Field Name	Description
Field used for Third Party Skills	A field to determine the criteria to apply the Third Party Skill. The values of this field should also match a defined Skill in Nextiva.
No Third Party Agent Available Callback in (Minutes)	After how long in minutes should the dialer attempt to call the lead again if there are no available agents.
Minimum Available users for Third Party calls	The minimum amount of agents with the Third Party Skills must always be available. The dialer will begin dialing only when there's more than the set number of available agents. This is to preserve agents available for inbound if the agents are taking inbound and dialer calls.
Queue for Third Party Skills	Select the queue and the skill required for the third-party calls. The third-party agent available must have the skill and be a part of the queue.
Only Load Leads for Available Third Party Users	Enable if you don't want to load any leads into memory for third party skill unless there is at least one available agent with that skill.

First Party Skills Tab

NOTE: The **Use For Progressive Dialing** toggle button in the Options Tab must be enabled to see this tab.

Specify how First Party Skills will be handled in the campaign.

Field Name	Description
Field used for First Party Skills	A field to determine the criteria to apply the First Party Skill. The values of this field should also match a defined Skill in Nextiva.

SMS Actions Tab

NOTE: The **Use For SMS** toggle button in the Options Tab must be enabled to see this tab.

Field Name	Description
Success Function	The function that you're calling when the SMS is sent successfully.
Template	What you're using to send in the SMS. This could be text or text and a variable that resolves.
From	The number from which you're sending the SMS.
Failed Function	The function that you're calling when the SMS fails to send.
Messages per Minute	<p>The maximum number of messages Nextiva will send per minute. If you send 60 messages per minute, Nextiva will send one message every second. If you choose to send 120 messages, Nextiva will send two messages per second. If you choose 180 messages, Nextiva will send three messages per second.</p> <p>NOTE: Nextiva rounds down, so if you choose 119 messages per minute, Nextiva will send one message per second (60 per minute.) If you choose 120, Nextiva will send two messages per second (120 per minute).</p>

Services Tab

Field Name	Description
Conversation Insights	The service Nextiva uses for transcription. This is done based on recordings.
Knowledge Base	Only Shelf AI is supported. This field sets up parameters to pass data to the knowledge base; based on what's passed, Shelf AI does a knowledgebase search and returns potential replies in the Nextiva UI.
Real Time Analysis	This is transcription done in near-real time while the conversation is ongoing. This can help generate answers for a customer.
Summary	The service that will summarize the transcription.

Recordings Tab

Field Name	Description
Recording percentage	Recording percentage or probability that a call in that campaign will be recorded (0-100%).

File Server	The File Server object to which recordings will be uploaded.
Filename Format	The format of the recording file name. Report_`\${date}.csv" will result in the file name "Report_20210524.csv". Other available formats are: `\${workitemId}-\${campaignName}-\${date, MM_dd_yyyy}, `\${workitemId}-\${date, MM_dd_yyyy}-\${campaignName}, `\${workitemId}-\${campaignName}-\${date, HH_mm_ss_MM_dd_yyyy}, `\${workitemId}-\${campaignName}-\${date, ss_MM_dd_yyyy}, `\${date, MM_dd_yyyy}, `\${workitemId}, `\${campaignName}, `\${workitemId}-\${campaignName}, id-campaignName-date
Apply Consent On Two Party Regions	If calling a region defined as two-party, with this toggle enabled, it will present a warning asking the user to confirm that both parties have agreed to be recorded.
Disable Recording On Two Party Regions	Blocks recording on two-party regions. Removes the button from the workitem and will not record automatically even if recording is set to 100%.
Recording notification prompt	The prompt to be used for recording notifications.
Recording notification interval	The interval that the recording notification plays at.

Transcription Tab

Field Name	Description
Start Time	Start time of the day for which recordings may be transcribed.
End Time	End time of the day for which recordings may be transcribed.
Minimum Duration (sec)	The minimum duration of a recording is for it to be transcribed.
Maximum Duration (sec)	The maximum duration of a recording for it to be transcribed.
Percentage of the maximum minutes	A percentage of the total transcription minutes available to the tenant.
Languages	Enter the language in which you want the transcription to be done.

Speech Contexts Tab

NOTE: The Use For Progressive Dialing toggle button in the Options Tab must be enabled to see this tab.

Select speech contexts to be associated with the campaign. Click the **Plus (+)** and select the speech context. Click **Ok**.

Data Loss Prevention Tab

This tab deals with protecting sensitive data the customer provides either verbally to an agent or manually typed into the Nextiva system. If the sensitive data is in a recording or transcription, it can be removed. There's a Google service called Google Cloud Data Loss Prevention that goes through the recording/transcription to look for information specified in the Information Type field and improves via speech contexts. The types of information that can be looked for are:

- Credit Card Numbers
- Email Addresses
- IBAN Codes
- Phone Numbers
- Swift Codes

The recording/transcription will be searched, and the specified information will be replaced with silence or a [REDACTED] comment.

The Redaction Type field allows you to select where you want the information to be redacted. There are three options:

- Redact All – Redact the info in both Transcriptions and Recordings.
- Redact Recording – Redact the information only on Recordings.
- Redact Transcription – Redact the information only on Transcriptions.

The Redaction Likelihood field opens a menu where you can select the sensitivity of the redaction. The choices are:

- Likely
- Possible
- Unlikely
- Very Likely
- Very Unlikely

We recommend you start with Very unlikely and move your way up.

Screen Recording Tab

Field Name	Description
Type	Select the type of screen recording that you wish to use. Nextiva is a native recording of the agent's screen if enabled on their profile. Calabrio is a third-party software that requires installation.

Scorecards Tab

NOTE: The **Use For Progressive Dialing** toggle button in the Options Tab must be enabled to see this tab.

Select scorecards to be associated with the campaign. Click the **Plus (+)** and select the response template. Click **Ok**.

Response Templates Tab

NOTE: The Use For Progressive Dialing toggle button in the Options Tab must be enabled to see this tab.

Select response templates to be associated with the campaign. Click the **Plus (+)** and select the scorecards. Click **Ok**.

Spoof ANI Tab

Toggle Button	Description
Spoof ANI on Agent Transfer	If enabled, instead of sending the call center's phone number, you are sending the caller's phone number. So, any third-party system could do an ANI lookup and see the customer's information.

Supervisors Tab

This is where you can assign supervisors to a campaign. Supervisors can also be assigned in the campaign detail view.

Workflow Tab

Field Name	Description
Workflow	Select the workflow object that is to be used by this campaign. It will replace the current workflow options and workflow sections below.

Automated Jobs Tab

Field Name	Description
Job Trigger	Job triggers are business events that are used to trigger jobs.

Conversation Insights Tab

OPTIONAL FOR: All Campaigns.

Field Name	Description
Service	Select NLP (Natural Language Processing) if you want workitem conversations analyzed. NOTE: NLP must be configured as a service in Nextiva.

Survey Region Tab

Field Name	Description
Survey Region	What region will be used to make calls into the campaign from the survey.

Quality Monitoring Recordings Tab

Specify the file server you want the recording on and the file format of the recording.

Field Name	Description
Enable	Enable if you want to use Quality Monitoring Recordings.
File Server	The file server you want the recording on.
Filename Format	The format of the file name

Nextiva supports the following variables for the file format:

- `${workitemId}`
- `${callId}`
- `${userId}`
- `${username}`
- `${workitemId}`
- `${recordingId}`
- `${filename}`
- `${createdAt,<date_format>}`

Field Mappings

Field mappings are essential for converting external objects, such as CSV tables, into Nextiva's native JSON objects. This process allows the Nextiva application to seamlessly use imported items by mapping data fields from the CSV file to fields within Nextiva JSON objects. Proper formatting of the CSV file is crucial for this functionality.

Field mappings are versatile and can be utilized in various scenarios within Nextiva, including campaigns for mapping leads for the dialer and in Load Objects for importing contacts, consent numbers, DNC lists, and more.

Creating a Field Mapping

Search for the **Field Mapping** icon in the Options Menu. Click **Plus (+)** to the right of the Search field. Enter the required information under each tab.

The screenshot shows the 'Field Mappings - CCA Users' interface. It has two tabs: 'Information' (selected) and 'Fields'.
Information Tab:
 - NAME: CCA Users
 - DESCRIPTION: (empty field)
 - FILE NAME: CCA.CSV
 - MAPPING SCHEMA: x User
Fields Tab:
 - MAP FIELD: A list of fields with 'none' selected for each and a dropdown arrow.
 - Fields listed: ACD Login Status, Agent Device, Allow ACD Changes, Always Show Web Notification, Auto Accept Workitem, Auto Disposition, Auto Login To ACD.

Information Tab

Syntax	Description
Name	The name of the Field Mapping. The name you enter should be meaningful so other administrators can easily understand it and make it easy for you to know when assigning Field Mappings to campaigns or loading objects.
Description	The description of the Field Mapping.
File Name	Where you select the file, you wish to import. Field Mappings will take the headers from the file and make them available in the Map Field section.
Mapping Schema	The target JSON object in Nextiva. Different schemas will have different fields for your data.

NOTE: Once you have created the field mapping, you can reuse it every time you import data so long as the CSV file contains the same format each time you import.

Fields Tab

The Fields Tab is where the Map Fields are. Here is where the JSON fields are, and a drop-down on each with the list of CSV headers is provided, hence creating the map.

Assigning a Field Mapping to a Campaign

Once you have created the Field Mapping, you can assign it to a campaign.

Search for the **Campaign** icon in the Options Menu and select the campaign. Scroll down to Field Mapping and select the **File** icon to choose a field mapping to upload predictive and progressive lists. Click **OK**.

You can also use Field Mapping under Load Objects to upload a large list. For example, adding a large number of contacts, campaign addresses, or phone numbers to your company's local do-not-call list.

Select the File icon to the right of Field Mappings and select the field mapping. Click **OK**.

Dispositions

Dispositions in Nextiva represent the outcomes of work items that users assign after they terminate them. Users select the appropriate disposition from a drop-down list, accurately categorizing the outcome of the work item.

Creating Dispositions

Search for the **Disposition** icon in the Options Menu. Click **Plus (+)** to the right of the Search field. Enter the required information under each tab.

Information Tab

Field Name	Description
Name	The name of the Disposition. The name should be descriptive and easily understood by the system users.
Description	The description of the Disposition. This is where you can further elaborate on the purpose of the Disposition. This field is displayed on the creation page but not when a user chooses a Disposition.
Workitem Type	Dispositions can be filtered by workitem type. For example, you may want a particular Disposition to be used with certain workitem types.

Filtering a Disposition by Workitem by Type

The list of workitem types is:

- Chat
- Email
- Inbound Call
- Inbound Fax
- Inbound SMS
- Outbound Call
- Outbound Email
- Outbound Fax
- Outbound SMS
- Predictive Call
- Progressive Workitem

NOTE: Dispositions will only be available for workitem types selected in the list. If none are on the list, the disposition will be available for all workitem types.

Lead Tab

Field Name	Description
Function	The logic is to be carried out by the workflow engine, which is created in a workflow function.
Action	The action taken on a lead could be a callback or removal from the list.
Priority	The priority assigned to the lead in the list.

Possible Disposition Actions

Action	Description
Answering Machine	Will treat the call as an Answering Machine. You can configure how long the dialer will wait before calling the customer back under Callback In.
Busy	Will treat the call as a Busy number. You can configure how long the dialer will wait before calling the customer back under Callback In.
Callback	Users will select a date and time for the Callback from a pop-up window with a calendar.
Personal Callback	Users will select a date and time from a pop-up window with a calendar.

Do Not Call	Add the number to your company's local Do Not Call list and remove it from the dialer-list if the outbound call originated from a Predictive or Progressive list.
Fax Machine	Will treat the call as a Fax Machine and remove it from the dialer list if the outbound call originated from a Predictive or Progressive list.
Invalid Number	Will treat the call as an Invalid Number and remove it from the dialer-list if the outbound call originated from a Predictive or Progressive list.
No Answer	Will treat the call as a No Answer call. You can configure how long the dialer will wait before calling the customer back under Callback In.
Remove From List	Will remove the number from the list of numbers to dial.

System Integration Tab

Field Name	Description
Note	A message will be displayed to the agent when the disposition action calls the API correctly.
REST API	The field that holds the appropriate REST API from the API Object.

Options Tab

Field Name	Description
Resolved	Enabling Resolved will mark the workitem as Resolved, indicating no further action is required.
Force Survey Validation	Enabling Force Survey Validation is used with surveys. If a survey has a mandatory field that is not completed, select a disposition with Force Survey Validation, which will alert the user to complete the required fields before selecting this disposition.
Connect Again	For predictive/progressive calls, Enabling Connect Again will allow you to call back the customer. This changes the workitem ID and allows the agent to contact the lead with a different phone number.
Block Number	Enabling Block Number will add the number associated with the workitem to the Blocked Numbers table.

Force Contact Assignment	If enabled, when a user selects the configured disposition and there's a contact assigned to the workitem, it will be dispositioned. If there's no contact assigned, a pop-up window will appear saying that a contact must be assigned to the workitem.
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User Profiles Tab

A disposition assigned to the user profile is a subset of the dispositions assigned to the campaign.

If the campaign has ten dispositions: A, B, C, D, E, F, G, H, I, and J, and the user profile has 5 A, B, C, D, and E, then only A, B, C, D and E will be presented to the user when dispositioning a work item.

If the campaign has five dispositions assigned C, D, E, F, and G, and the user profile has 5 A, B, C, D, and E when the user dispositions a workitem from this campaign, only the union of the two lists will be shown C, D, and E.

If there is no union, the entire list of dispositions is presented. This is a protection against a bad configuration.

If there are no possible dispositions on the user's UI, they will be stuck with that workitem on their screen and unable to get any other ACD workitem. They can handle non-ACD workitem, but the undispositioned workitem will stack up on their UI until someone fixes the bad configuration.

Time Events

Time events are utilized to define specific times for certain activities, such as national holidays, business hours, or recurring events like daily or weekly tasks. These events are particularly useful for scheduling tasks, such as generating scheduled reports or setting out-of-office prompts during workflow closing hours.

Creating Time Events

Search for the **Time Events** icon in the Options Menu. Click **Plus (+)** to the right of the Search field. Enter the required information under each tab.

The screenshot shows a web interface for creating a 'Time Event'. The title is 'Time Event - Christmas'. There are two tabs: 'Information' (selected) and 'Interval'. The 'Information' tab contains the following fields:

- NAME:** A text input field containing 'Christmas'.
- DESCRIPTION:** An empty text input field.
- TYPE:** A dropdown menu currently showing 'x Custom Date'.
- FROM (AMERICA/PHOENIX):** A date and time input field showing '12/24/2024 22:00'.
- TO (AMERICA/PHOENIX):** A date and time input field showing '12/26/2024 21:59'.

Information Tab

Field Name	Description
Name	The name of the Time Event.
Description	The description of the Time Event.
Type	Select the type of Time Event you would like to define. <ul style="list-style-type: none"> • Daily: This option allows you to define the Start and End Time of one specific day of the week. • Custom Date: This option allows you to define one specific event's Start and End date/time. • Weekly: This option allows you to select what days of the week this is to occur. • Job: Intervals on days used for scheduled reports or ETL.
Start Time	The start time of the Time Event.
End Time	The end time of the Time Event.
Day	The day of the Time Event.

When creating a new Time Event, you must click the **Save** button on the top right-hand corner of the screen.

Interval Tab

The Interval Tab holds the time interval (only used for type Job).

Recordings

The Recordings feature in Nextiva allows users to manage and analyze their call recordings effectively. Users can search for, listen to, and view transcriptions of recordings. They can also access scorecards, assess the tone and sentiment of conversations, and run transcriptions and scorecards manually.

Accessing a Recording

Search for the **Recording** icon in the Options Menu. Each recording will have the following four tabs.

Information Tab

Field Name	Description
From	The origination address.
To	The destination address.
User Identifier	The user ID.
Call Identifier	The unique Call ID.
Duration	The length of the recording.
Filename	The file name of the recording.

Playing a Recording

This section holds both the call and voicemail recordings, which can be played or downloaded by clicking the ellipsis. If you pause and start a recording within a voice call, a single file will combine all of the recordings. Multiple recordings can be played back.

Transcription and Tone

The transcription is a copy of the recording converted into words. For each line of the conversation, you will have:

- The tone of the person speaking.
- How many seconds into the conversation the person started speaking.
- The length of that portion of the conversation, in seconds.
- The transcribed text.

The Tone will be displayed as one of three emoji faces.

- A Green happy face.
- An Orange neutral face.
- A Red unhappy face.

The curly arrow button can be used to refresh the transcription.

The Scorecard Tab

Scorecards associated with the campaign will be displayed, and the classifications inside of them will have a percentage likelihood that they were covered in the call. A green check or red alert icon beside the classification will present this visually.

NOTE: Scorecards will not run on voicemail recordings.

Campaign Recordings

Each campaign will have the following three tabs related to recordings.

Recording Tab

Field Name	Description
Recording Percentage (Slider)	Recording percentage or probability that a call in that campaign will be recorded (0-100%).
File Server	The File Server Object to which recordings will be uploaded.
Apply Recording on Two Party Regions (Toggle Button)	If calling a region with this toggle enabled, it will present a warning asking the user to confirm that both parties have agreed to be recorded.
Disable Recording on Two Party Regions (Toggle Button)	Blocks recording on two-party regions. Removes the button from the workitem and will not record automatically even if recording is set to 100%.

Transcription Tab

Field Name	Description
Start Time	Start time of the day for which recordings may be transcribed.
End Time	End time of the day for which recordings may be transcribed.
Minimum Duration (Seconds)	The minimum duration of a recording for it to be transcribed.
Maximum Duration (Seconds)	The maximum duration of a recording for it to be transcribed.
Percentage of the Maximum of Minutes (Slider)	A percentage of the total transcription minutes available to the tenant is allocated to this campaign.

Scorecards Tab

This tab contains the list of scorecards to apply to transcriptions in this campaign.

Workitem History

Click on the **History** icon in the Options Menu to view the history of workitems. This option also allows you to listen to recordings and voicemails.

Searching for a Workitem

To search by a specific phone number or Workitem ID, enter the information in the top search window and click **Search**.

Click the **Filter** icon next to the Search icon, and a window will appear that allows you to narrow your search even further. You can limit the search by:

- A specific user
- Campaign
- Queue
- Disposition
- Duration
- Date Range
- A combination of any of the above

You can display an agent's name in the list view in history by double-clicking and selecting the column User (ownedByID). You can display the workitem duration in the List view by double-clicking and adding the column Duration (_duration).

NOTE: Modifying the history of a workitem will not trigger actions and functions associated with the disposition of that workitem.

Clicking on an individual workitem will bring up the Information, Data, and Events of that workitem. Depending on the type of workitem, other information, such as recordings and user surveys, will also be available.

Icons

In the history of any workitem, there will be a row of icons in the right corner:

- Email the transcription.
- Allow access to the QM survey.
- Allow the survey and disposition of the workitem to be modified.
- Allow the history of the workitem to be printed.
- Export the history of the workitem.

History Headers

The headers along the top act as shortcuts to navigate the specified area. You can either scroll down to the options you wish to view or click on one of the headers along the top, and the system automatically brings you to the selected section.

Header	Description
Identifier	A unique call identifier.
Call ID	The ID of the call.
Avatar	The avatar of the user who handled the workitem.
Type	The type of workitem.

From	The origination address of the workitem.
To	The destination address of the workitem.
Duration	The duration of the workitem.
Campaigns	The name of the campaign that the workitem entered.
Queues	The name of the queue that the workitem was handled by.
Users	The user who handled the workitem.
Created At	The date and time that the workitem was created.
Terminated At	The date and time that the workitem was terminated.

Information Tab

Header	Description
From	The origin of the workitem.
To	The destination of the workitem.
Priority	The priority of the workitem.
Created At	The time the workitem was created at.
Queued At	The time the workitem was assigned to a queue.
Terminated At	The time the workitem was terminated at.
Offered At	The time the workitem was offered to a user.
Assigned At	The time the workitem was assigned to a user.
Dispositioned At	The time the workitem was dispositioned at.
Workitem Id	The ID of the workitem.
Call ID	The ID of the call.
Agent	The agent to whom the workitem was assigned.
Queue	The queue that the workitem was assigned to.
Campaign	The campaign that the workitem belongs to.
Disposition	The disposition of the workitem.
Duration	The duration of the workitem.

Conversation Tab

The Conversation tab shows the entire conversation for Chat, SMS, Facebook, or Email workitems.

Recordings Tab

The Recordings Tab will show all recordings attached to the workitem.

User Survey Tab

For workitems with a survey attached to them, the User Survey Tab will represent the survey attached to the workitem.

Quality Monitoring Survey Tab

The Quality Monitoring Survey Tab displays the quality monitoring survey attached to the workitem.

Data Tab

The Data tab displays all the custom variables of the workitem.

Events Tab

Shows the list of events attached to the workitem.

Transcription

Nextiva displays a summary of the workitem provided by an AI integration. The summary is displayed at the end of the workitem and in the history of the workitem.

Translation

- Offline event: You lost connection completely. No information can be received or sent.
- Socket offline: The socket was broken.

Blocked Numbers

Blocking numbers is an efficient way to manage unwanted calls or messages. When a number is added to the blacklist, any incoming calls or messages from that number are automatically rejected. Users can customize how these blocked numbers are handled, such as sending them straight to voicemail or receiving a notification when they attempt to call.

Adding a Blocked Number

Search for the **Blocked Number** icon in the Options Menu. Click **Plus (+)** to the right of the Search field. Enter the required information under each tab.

Information Tab

Field Name	Description
Address	The number to blacklist. This is mandatory.
Description	Any description you'd like to add to why the number is blocked. This is optional.

Using Blocked Numbers

To enable blocked numbers in a campaign, add the "Transition if blocked action" in the workflow begin state.

NOTE: You can also add blocked numbers automatically when agents select a disposition by enabling the blocked number action on the disposition.

Allowed IP Addresses

The "Allowed IP Addresses" feature is a configuration tool used by administrators to grant access to the Nextiva platform. Once specific IP addresses have been added to the list, the platform will only allow access to those addresses. It is important to add your current IP address to the list first to ensure uninterrupted access.

Adding Allowed IP Addresses

Search for the **Allowed IP Address** icon in the Options Menu. Enter the required information under each tab.

Information Tab

Field Name	Description
Name	The name of the IP address.
IP Address	The IP address itself. Ranges cannot be entered. Each IP address must be entered individually.

Prompts

Prompts in Nextiva allow users to create, upload, view, and listen to audio messages used in various workflows. These prompts can be customized for different languages and voices, ensuring clear and consistent communications.

Creating a New Prompt

Search for the **Prompt** icon in the Options Menu. Click **Plus (+)** to the right of the Search field. Enter the required information under each tab.

Information Tab

Field Name	Description
Name	This is the name of the prompt and will be visible when adding a prompt to the workflow.
Description	Although this is not a mandatory field, it is recommended that you enter the text of the prompt that will play so that it will be easy to find in the future, and you will not need to listen to each prompt to find the prompt you are looking for.
Prompt	To upload a prompt, select the circle with the three ellipses. A window will open. Navigate to the folder on your computer that contains the recording you wish to upload, select the file, and select open. This will upload the file to the server. You will see the file name you just uploaded on the bar below.

Text to Speech Tab

Field Name	Description
Content	Select the globe icon to type the message content in different languages. Once the prompt is saved, the audio files will be created automatically. You can use SSML to improve the timing of the message and make it sound more human.
Spanish Voice Name	Choose the specific voice you want for the prompt to generate a file in Spanish. Standard, WaveNet, and Neural formats have different voice qualities.
English Voice Name	Choose the voice you want for the prompt to generate a file in English. Standard, WaveNet, and Neural formats have different voice qualities.
Portuguese Voice Name	Choose the specific voice you want for the prompt to generate a file in Portuguese. Standard, WaveNet, and Neural formats have different voice qualities.
French Voice Name	Choose the specific voice you want for the prompt to generate a file in French. Standard, WaveNet, and Neural formats have different voice qualities.

Finding an Existing Prompt

You can search based on the prompt name or description.

Listening to a Prompt

You can play the prompt by selecting the **Play** icon.

Functions

Functions are reusable pieces of workflow that can be utilized across multiple campaigns. By using functions, you can avoid the redundancy of creating the same workflows repeatedly. For example, if several campaigns play different greeting prompts but share the same menu and actions, you can consolidate these shared elements into a function.

To create or modify a Function, search for the **Function** icon in the Options Menu.

Creating a Function

To create a new function, click **plus (+)** to the right of the search field. The system will present an empty template to fill in. The template will have the following tabs:

Information Tab

Field Name	Description
Name	The name of the function.
Description	A description of the function.
Show in dashboard option	If enabled, and there is a transfer to a function configured in a dashboard, this function will be displayed in the dashboard.

If this is a new Function, you must click the **Save** button at the top right of the screen before configuring the State Machine.

Content Tab

The Content Tab is where the function will be configured.

Configuring an ACD Voicemail Function

To use the ACD Voicemail function correctly, the following settings should be configured in the workflow that will use ACD Voicemail.

2. In the Begin State, add a **Save Variable** action box as one of the first actions with the following parameters:
 - Set the Variable Name to **messageRecorded**.
 - Set the Expression to **0**.
3. In the End State, add an **ACD Voicemail** action box before the **Terminate** action box.
 - Set the Condition Type to **And**.
 - Set the Expression to **workitem.data.messageRecorded**.
 - Set Sign set to **==**.
 - Set Value to **1**.
4. An **Execute Function** action box will need to be placed in the workflow at the point where the customer will be directed to leave the voicemail with the following parameters:
 - Set the Function identifier to **ACD Voicemail**.

NOTE: If a condition is set in this action box, the system will only prompt the caller to leave a voicemail if the condition is true.
5. Set the Workflow Option: Final State Customer Hangup to point to **End State**. This will allow the system to call the End State if the customer hangs up after recording the voicemail.

Security

Nextiva offers password rules to safeguard access to the Nextiva platform. Password rules are a set of parameters designed to encourage users to use strong passwords and passwords properly.

Defining a Password Rule

To define a Password Rule, enter the following:

Field Name	Description
Name	The name of the rule.
Description	A description of the rule.

Defining an Account Policy

For an Account Policy, the following can be configured:

Field Name	Description
Lockout Threshold	Determines the number of failed sign-in attempts that will cause a user account to be blocked.

Lockout Duration	Determines the amount of time with no activity, in milliseconds, that a locked-out account remains blocked before sign-in can be reattempted.
Session Timeout	Determines the amount of time with no activity, in milliseconds, for a user to be automatically logged out.

Password Positive Rules: Possible Configurations

For Password Positive Rules, the following can be configured:

Field Name	Description
Allowed Regex	Requires passwords to conform to a regular expression.
Allowed Alphabetical	Defines the minimum number of alphabetical characters the password requires (upper and lower case).
Allowed Digit	Defines the minimum number of digit characters that the password requires.
Allowed Lowercase	Defines the minimum number of alphabetical characters the password requires (lowercase).
Allowed Uppercase	Defines the minimum number of alphabetical characters the password requires (upper case).
Allowed Special	The list of possible characters to be used in a password. (Use this to restrict the characters from a keyboard they can use.)
Allowed Characters	The list of possible characters to be used in a password. (Use this to restrict the characters from a keyboard they can use.)
Expiration Date	Determines the period of time, in milliseconds, that a password can be used before the system requires the user to change it.

Negative Password Rules: Possible Configurations

For Negative Password Rules, the following can be configured:

Field Name	Description
Allowed Dictionary	Rejects passwords that exactly match an entry in a dictionary (exact match semantics).
Allowed Sub String Dictionary	Rejects passwords containing a dictionary entry (substring match semantics).
Illegal Sequence Alphabetical	Rejects passwords that contain a sequence of N alphabetical characters. (Defines the maximum number of alphabetical

	characters used in a row inside a password.) Example: Illegal Sequence Alphabetical = 4 – You cannot use more than four letters in a row before requiring a digit or special character break inside the password.
Illegal Sequence Numerical	Rejects passwords that contain a sequence of N-digit characters. (Defines the maximum number of digits used in a row.)
Illegal Sentence Qwerty	Rejects passwords that contain a sequence of N US QWERTY keyboard characters. Example: Illegal Sequence qwerty = 3 – Cannot go past “qwe” or “tyu” or “iop”.
Illegal Regex	Rejects passwords that contain a match to a regular expression.
Minimum Length	The minimum required length.
Maximum Length	The maximum required length.
Lower Number Range	Rejects passwords that have numbers that are lower than the defined limit. (Used with upper number range.)
Upper Number Range	Rejects passwords that have numbers that are above the defined limit. (Used with lower number range.)
Illegal Character	Rejects passwords that contain any of the defined set of characters.
Repeat Character	Rejects passwords that contain multiple sequences of repeating characters. (Defines the maximum number of times a character can be repeated.)
Username Rule	Rejects passwords that contain the username of the user providing the password.
Whitespace Rule	Rejects passwords that contain whitespace characters.
Enforce History	If enabled, users will be prevented from resetting their passwords to prior passwords used in the last year.

Audit Log

Use the Audit Log to identify who has accessed or modified the system.

To access the Audit Log, search for the **Audit Log** icon in the Options Menu. Each entry represents a modification of an object or a user's login.

Searching the Audit Logs

Enter the information in the top search window to search by a specific string. The following criteria can refine searches:

- A user
- An operation
- An object type
- An object identifier
- A date range
- Expired data only
- Login, Logout
- Creating a record
- Updating a record
- Deleting a record

The **Information** tab contains the user, operation, object Type, identifier, and date. The **Changes** tab includes a list of modifications made to that object (not applicable on logins and logouts).

The Nextiva Platform doesn't automatically delete "expired" records. However, they can be found by adjusting the filter to search for expired records. Only users with profiles containing the "searchExpired" authority have that option.

Database Schema

A database schema describes data formats and specifies the records that can enter the database. In other words, a schema is the structure of the database that defines the objects in the database. A database generally stores its schema in a data dictionary.

The Nextiva Contact Center platform extends the native database schema with the "schematype" table that defines other tables with their fields, relationships, indexes, types, query fields, combinations of fields that constitute unique keys, and other elements. Schema types are predefined in the Nextiva platform and can be overridden by the tenant. For example, the "user" type is described in the "user" schema type. When looking up a user in the client UI, you see fields like "First Name", "Last Name", etc. All those fields are defined in the "user" schema type.

File Server

A file server is a tenant host outside the Nextiva platform, where a tenant's files can be uploaded and stored. When associating a file server to a campaign, all recordings for that campaign will be uploaded to that file server using a tenant-provided public key. File transfers can be done over SCP or SFTP protocols. SFTP and SCP offer features, including data-in-motion encryption and public key authentication. Additionally, both protocols support transferring large files, as they don't have file size limits.

Creating File Servers

Search for the **File Server** icon in the Options Menu. Click **Plus (+)** to the right of the Search field. Enter the required information under each tab.

Information Tab

Field Name	Description
Name	The name of the public key.
Description	The description of the public key.
Connection Type	Choose the protocol for file transfers, i.e., SFTP or SCP.
Remote Folder	The path on the remote host is where files are uploaded.
Timeout (ms)	The amount of time, in milliseconds, to wait for the file server to respond to the initial connection request.

Authentication Tab

The Authentication Tab will have a drop-down list of Authentication types to choose from:

- AWS Access Key
- Google Credentials
- Password
- Public Key

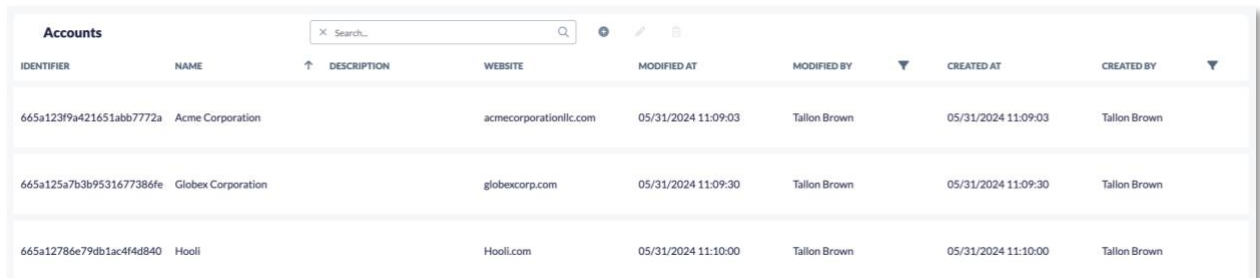
Field Name	Description
Authentication Type	Select the “Password” or “Public Key” authentication.
Username	The username is to be used during authentication.

Encryption Tab

The Encryption Tab will have a toggle button called Encryption, which should be enabled if files are encrypted with a public key.

Accounts

Associate Accounts with Contacts via Account Identifiers. Under Accounts, you can quickly view the business name, description, and website URL - including the option to add, edit, or delete Accounts.



IDENTIFIER	NAME	DESCRIPTION	WEBSITE	MODIFIED AT	MODIFIED BY	CREATED AT	CREATED BY
665a123f9a421651abb7772a	Acme Corporation		acmecorporationllc.com	05/31/2024 11:09:03	Tallon Brown	05/31/2024 11:09:03	Tallon Brown
665a125a7b3b9531677386fe	Globex Corporation		globexcorp.com	05/31/2024 11:09:30	Tallon Brown	05/31/2024 11:09:30	Tallon Brown
665a12786e79db1ac4f4d840	Hooli		Hooli.com	05/31/2024 11:10:00	Tallon Brown	05/31/2024 11:10:00	Tallon Brown

Creating Accounts

Search for the **Contact** icon on the options menu. Click **Plus (+)** and fill out the account details (Business name, Description, and Website URL. Click **Save** when done.

Categories

Categories are labels used for the predictive classification of incoming text workitems such as SMS, email, and chat. Category Summaries are machine learning classifiers that predict the labels of these workitems using Google's AutoML service. By using AI to route text-based workitems accurately, Categories enhance user productivity and reduce queue and response times.

Creating Categories

Creating a Category involves defining a classification that groups similar workitems together, ensuring they are handled consistently.

Search for the **Category** icon on the options menu. Click **Plus (+)** and fill out the required information (Identifier, Name, and Description).

Category Summaries

Category Summaries are essential for training AI classifiers to accurately distinguish and classify text within workitems. By uploading examples of text, the AI learns to identify and categorize similar incoming workitems. This automated classification improves the efficiency and accuracy of routing text-based workitems, such as SMS, emails, WhatsApp messages, and chats.

Creating a Category Summary

Search for the **Category Summary** icon on the options menu. Click **Plus (+)** and fill out the required information.

Information Tab

Field Name	Description
Name	The name of the Category Summary.
Description	A description of the Category Summary.

Categories Tab

The Categories Tab will be where you can select the Categories used in the classifier (the target labels).

Category Summary Tab

The Category Summary Tab is where you upload the CSV with examples first to train the classifier. Each Category Summary can have up to two machine learning models, which can be switched between, so there is always an active and a training model. The buttons allow you to toggle between them.

NOTE: You must disable the first model before enabling the second one.

Authorities

Authorities in Nextiva are used to configure user permissions, ensuring that the right people have access to the necessary features and information. Authorities are grouped into Authority Sets, which are associated with User Profiles to manage permissions across different user groups efficiently.

Creating an Authority

Search for the **Authorities** icon on the options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Name	The name of the authority.
Authority Set Identifier	Select which authority set this authority will be assigned from the list.
Description	The description of the authority.

The Authorities Tab

The Authorities are broken down into three sections:

1. Domain: Select the domain for which the permissions will be configured. The possible domains are:
 - “*”
 - “type”
 - “type.contact”
 - “type.note”
 - “type.tenant”
 - “type.workitem”
 - “ui”
 - “ui-potent”
2. Entity: Select which entities (objects or tables) in the domain to assign or remove permissions from. The types of entities are:
 - *
 - account
 - actiontemplate
 - acd-logout
 - allowedipaddress
 - areacode
 - assistance
 - auditlog
 - authorities
 - authorityset
 - authoritysetassignment
 - billing
 - billingdigitalrate
 - billingvoicerate
 - blocked
 - businessevent
 - businesseventtimeevent
 - calendarevent
 - callback
 - callcontrol-conference
 - callcontrol-hold
 - callcontrol-mute
 - callcontrol-transfer
 - callcontrol-voicemail

- campaign
- campaignagentscript
- campaigncompliance
- campaigndialplan
- campaigndisposition
- campaignentity
- campaigngoals
- campaigngoalsperformance
- campaignoutboundlist
- campaignperformance
- campaignscorecard
- campaignscript
- paignspeechcontext
- campaignstate
- campaignstatedid
- campaignsurvey
- campaigntemplate
- category
- categorygroup
- categorysummary
- channel
- cherrypick
- classification
- click-to-dial-all
- click-to-dial-terminated
- cluster
- commconsent
- compliancedisposition
- component
- consumerportal
- donotrecordnumber
- download-recording
- emailaccount
- email-outbound
- etl
- extension
- facebookpagetoken
- facebookusertoken
- fieldmappings
- file
- fileserver
- filter
- flashconfig
- flashimage
- function
- googlescriptconnector
- googlescriptconnectorgoglescriptdata
- googlescriptdata
- group
- dial-from-icon

- dial-type-select
- dial-pad
- dialplan
- directory
- directory-agent
- directory-queue
- directory-topic
- directory-voice-message
- disposition
- header-click-to-dial
- healthmetric
- holiday
- holidayoutboundrestriction
- home
- hometab
- contactpreferredphonenumber
- contactticket
- countryholidays
- creditcard
- dashboard
- datastudio
- demographicdisposition
- contactnote
- contactnotification
- contactphonenumber
- contactcreditcard
- contactinsight
- contactdial-campaign-select
- dialeractionresult
- hometabwidget
- incident
- incidententry
- incidententrylist
- incidenthealthmetrics
- insight
- invoice
- ipaccesslist
- ipaddress
- language
- lead
- leadattempt
- music
- musicprompt
- networkregion
- note
- notification
- objectlist
- operatinghours
- optin
- outbound-campaign

- outboundhours
- outboundlist
- outboundlistfilter
- outboundrestriction
- outbound-statistic
- passwordrule
- paymentportal
- performance
- phonenumber
- portalpaymentadminsettings
- portalpaymentdebtor
- portalpaymentdisputedebt
- portalpaymentemailtemplate
- portalpaymentinstallment
- portalpaymentlog
- portalpaymentloginattempt
- portalpaymentmessage
- portalpaymentrecurring
- portalpaymentregistration
- portalpaymentrequestdoc
- portalpaymentsettings
- portalpaymenttransaction
- portalpaymenttransactionitem
- portalpaymentuser
- privatekey
- progressdisposition
- prompt
- pstnnumber
- publickey
- quarterback
- queue
- rate
- realtimestats
- recording
- recordingscorecard
- regex
- region
- regionareacode
- regionoutboundhours
- regionoutboundrestriction
- relation
- report
- report-generic-query
- reportlegend
- reportuser
- restcall
- rpc
- rpcdispositon
- salesforceusertoken
- schemalayout

- schematype
- scorecard
- scorecardclassification
- script
- service
- session
- settings
- settings-general
- settings-telephony
- settings-acd
- settings-notification
- settings-duration-notification
- settings-hold-notification
- settings-disposition
- settings-signature
- settings-dialpad
- settings-directory
- settings-sound
- settings-supervised-campaigns
- settings-supervised-queues
- settings-supervised-users
- settings-supervised-users-in-queues
- sharedservice
- sipcredentials
- sipcredentialslist
- sipdomain
- workitem
- workitemhistory
- workitemlog
- workitemtype
- workitem-voice-message
- zipcode
- sipendpoint
- skill
- smscompliance
- sms-emoji
- sms-outbound
- statedid
- statedidptsnumber
- status
- supervisor
- supervisorcampaign
- supervisorqueue
- supervisorqueueusers
- supervisoruser
- survey
- survey-history
- surveytheme
- template
- temporarydnc

- tenant
- tenantcountryholidays
- tenantDNC
- tenantfacebookpagetoken
- tenantfacebookusertoken
- tenantservice
- tenanttoken
- tenanttwitterusertoken
- ticket
- timeevent
- timeeventoutboundrestriction
- token
- topic
- transcript
- translationkey
- twitterusertoken
- user
- userclientsettings
- usergroup
- userhometab
- userprofilechannel
- userprofiledashboard
- userprofilehometab
- userpromo
- userqueue
- usersalesforceusertoken
- userskill
- vertical

3. Values: Sets the permissions for the selected entities. The possible values are:

- “*”,
- “view”,
- “view-mine”,
- “search”,
- “search-all”,
- “create”,
- “update”,
- “update-mine”,
- “delete”,
- “hide”,
- “show”,
- “login”,
- “login-to-tenant”,
- “record”,
- “listen”,
- “join”,
- “logout”,
- “terminate”,
- “outbound”,
- “extension”

Duplicating an Authority

To duplicate an existing authority, highlight the authority and click the **Duplicate** icon to the right of the search field.

Authority Sets

Authority Sets are vital for creating customized user profiles. These sets consist of groups of authorities that define the permissions and access rights for different user profiles. By configuring Authority Sets, you can tailor user access to specific areas within the Nextiva UI, ensuring each user has the appropriate level of access based on their role.

Creating an Authority Set

Search for the **Authorities Set** icon on the options menu. Click **Plus (+)** and fill out the required information (name and description). Click **Save**.

Private Key

A Private Key is essential for authenticating connections to a tenant file server. This method ensures secure and verified communication between the Nextiva service and the tenant's server using public key authentication.

How Private Key Authentication Works

Private key authentication, commonly referred to as public key authentication, involves a pair of keys: a public key and a private key. While like the keys used in encryption, these keys serve a different purpose—authentication rather than confidentiality.

Creating a Private Key

Search for the **Private Key** icon on the options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Name	The name of the private key.
Description	The description of the private key.
File	The private key provided by the tenant.

Public Keys

A Public Key encrypts tenant files into an unreadable format before uploading them to a tenant file server. The tenant then decrypts the files using a different but matching private key. Public and private keys are paired to enable secure communication.

Creating a Public Key

Search for **Public Key** in the options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Name	The name of the public key.
Description	A description of the public key.
Recipient	The public key recipient/username provided by the tenant.
File	Upload the public key file provided by the tenant.

Campaign Addresses

A Campaign Address is the designated phone number or alias used to route inbound work items (such as phone calls, chats, or social media messages) to the intended campaign. These addresses are often linked to phone or SIP routes from a telephone provider but can also be used for Webhooks in chat integrations or social media platforms.

Creating Campaign Addresses

Creating Campaign Addresses is crucial for effectively routing inbound work items to the correct campaign. A campaign address serves as the phone number or alias that directs incoming customer interactions to a specific campaign, ensuring that calls, chats, or messages are handled appropriately.

Search for **Campaign Address** in the options menu. Click **Plus (+)** and fill out the required information.

Campaign Address - +14809147190

Information Group

Information

NUMBER: +14809147190

DESCRIPTION: +14809147190

PROVIDER TYPE: Other SIP

Group

NAME	DESCRIPTION	MODIFIED AT	MODIFIED BY
------	-------------	-------------	-------------

Information Tab

Field Name	Description
Number	The number for inbound calls is the telephone number provided by Nextiva. The number entered must be digits only without any special characters, dashes, or brackets. Based on the phone number, the system will route the call. For inbound chats, the number is an alias that the web server will use to route chats to the correct campaign. Route chats to the correct campaign. The number for social media chat integration is the page ID assigned to your company's social media page.
Description	The description of the campaign address.
Provider Type	The Provider type informs the system which kind of workitem the campaign address will be used with (chat vs. call), as well as how the incoming workitem will be formatted depending on which telecom provider will be sending the incoming call request. The options are as follows: Chat: This should be selected for chat workitems, whether the chat originated directly in the system or through a social media integration. Other SIP: Should be selected for phone call integrations.

Depending on the telephone company carrying the number, an additional setup may be needed before using the number. For example, an API may need to be called, and a verification code may need to be applied before the campaign address is fully enabled. Check with your provider to see what is required.

Group Tab

Add the groups of which the number in the Campaign Address is part.

Campaign Goals

Campaign Goals are designed to inform users of the number of work items they are expected to handle within a 24-hour period. These goals help track performance and ensure that each campaign meets its targets efficiently.

Creating Campaign Goals

Search for **Campaign Goals** in the options menu. Click **Plus (+)** and fill out the required information.

Information Tab

Field Name	Description
Name	The name of the campaign goal. NOTE: Clicking on the globe icon will allow the name to be entered in different languages.
Description	The description of the campaign goal. NOTE: Clicking on the globe icon will allow the description to be entered in different languages.

Workitem Type Goals Tab

Field Name	Description
Inbound	The number of inbound ACD calls that each user should accept every 24 hours.
Outbound	The number of outbound calls that each user should make each 24 hours.
Progressive	The number of progressive calls that each user should make each 24 hours.
Predictive	The number of predictive calls that each user should make each 24 hours.
Chat	The number of chats that each user should accept each 24 hours.
Email	The number of inbound emails that each user should accept within 24 hours.

Assigning a Campaign Goal to a Campaign

Once a Campaign Goal is created, you can assign the campaign goal to a Campaign. After the Campaign Goal is assigned to a Campaign, each User can see the Campaign and the assigned goals on the User's Homepage. On the homepage, the user can see:

- The number of workitems they have handled.
- The average number of workitems handled by their co-workers.
- The highest number of workitems obtained by any of their coworkers.

Classification

Classifications are utilized for scorecards and transcriptions, enabling the system to identify and categorize content based on keywords. Each classification consists of a list of associated keywords that are searched for within transcriptions. Scorecards, which are used to evaluate performance and interactions, contain a selection of classifications grouped by similar types.

Creating a Classification

Search for **Classification** in the options menu. Click **Plus (+)** and fill out the required information.

Information Tab

Field Name	Description
Name	The name of the classification.
Description	The description of the classification.
Data	The list of keywords.

Consent

Consent in Nextiva refers to the level of contact permission that a customer has established with the contact center. This ensures compliance with communication preferences and regulations, allowing the organization to respect the customer's wishes regarding how and when they can be contacted. Customers can provide different levels of consent, including:

- **Do Not Call:** The customer does not wish to receive calls.
- **Opt-in:** The customer agrees to be contacted.

Creating a Consent Object

Search for **Consent** in the options menu. Click **Plus (+)** and fill out the required information.

Information Tab

Field Name	Description
Number	The Customer's telephone number or it may be an email address.
Consent Type	There are nine consent types in Nextiva: <ul style="list-style-type: none">• DNC – The customer has requested no further contact from the contact center under any circumstances.• Expired – For consents uploaded in the Temporary DNC list, this is the date and time in which the Temporary DNC expired.• Opt-In – The customer has agreed to be contacted by the contact center in the future at this address.• Opt-Out All– Opted out of all contact on this address.• Opt-Out Email – The customer prefers that the contact center not contact them at that email address.• Opt-Out Phone – The customer prefers that the contact center not contact them at that address.• Opt-Out SMS – The customer prefers that the contact center not contact them on that SMS address.• Pending – No consent has yet been given by the customer.• Re-Assigned – The person contacted has indicated that this phone number has been Re-Assigned and no longer belongs to the customer.
Campaign	The campaign to which the consent should be applied. Select the list icon to select the campaign and click OK.
Reason	Brief description where the system captures how the consent level was set, or a user can capture why a customer has chosen this level of consent.
Contact ID	The contact ID of the customer.

NOTE: The difference between DNC and Opt-Out All is that DNC will block all contact at any address, whereas Opt-Out All will block all contact at that address.

Credentials List

The Credentials List needs to be created when users use SIP phones as their telephones to communicate with customers.

Creating a Credentials List

Search for **Credentials List** in the options menu. Click **Plus (+)** and fill out the required information.

NOTE: If using SIP Endpoints, The Credential List will be automatically created when the first SIP Endpoint is created.

Dial Plan

Dial Plans are used to configure which phone provider to use, depending on the number pattern being dialed. Many dial plans can be created for different phone prefixes or even individual phones. However, it is important to maintain a structured order for these. If you are using an external provider for Nextiva, you must fill out the SIP and SIP Headers tabs.

Creating Dial Plans

Search for **Dial Plan** in the options menu. Click **Plus (+)** and fill out the required information.

Information Tab

Field Name	Description
Name	The name of the dial plan.
Description	The description of the dial plan.
Order	The priority of the particular dial plan. One is the highest priority.
Tag	This is used when making predictive calls, which will be sent to the list of FreeSWITCH machines with this tag. When you create a FreeSWITCH machine, the same tag must be specified. The dial plan will send the call to any FreeSWITCH machine with the same tag. In the Shared Service object in the Options tab, the Tag field must match the tag here in the Dial Plan.
Fallback Dial Plan	The fallback dial plan is to be used.
Internal Route	Set it to true if you're connecting two external systems and not dialing outside.

Dial Plan Tab

Field Name	Description
Dial Plan	Where to upload a list of patterns of numbers that can be used for this Dial Plan.
Dial Route	SIP or PSTN.
Prefix	Where to enter any prefix required by the SIP.

SIP Tab

Field Name	Description
SIP Host	The hostname or IP address that the SIP provider gives.
SIP Proxy	If you want your outbound call to traverse through a SIP proxy, the SIP proxy IP will go into this field.
SIP Username	The username that the SIP provider gives.
SIP Password	The password that the SIP provider gives.

SIP Headers Tab

The SIP Headers Tab allows the creation of Headers for an external SIP dialer. These are key-value pairs that authorize dialing on the external system.

Email Accounts

Creating an email account is essential for organizations that plan to use the Nextiva system to pick up and route email workitems. Accurate and valid information must be entered in all fields to ensure the system can access your email server and manage emails effectively.

Creating Email Accounts

Search for **Email Account** in the options menu. Click **Plus (+)** and fill out the required information.

Information Tab

Field Name	Description
Name	The name of the email account.
Description	The description of the email account.
Email Address	The email address that you want the system to access to pick up and distribute emails amongst your users.
Type	The email communication protocol for connecting to email servers. The types are IMAPS, Microsoft, POP3S, SENDGRID, SMTP + TLS, Gmail Client ID, and Gmail Service Account.
Outbound Email Only	Enable if you want to send emails from a certain account but do not want responses sent to that email address.

Email Configuration Tab

Depending on the email type specified in the Type field, different fields will be displayed in the Email Configuration Tab.

If the Type is IMAPS, the Email Configuration Tab will have the following fields:

Field Name	Description
Username	The username you chose when you created your email account.
Password	The password you chose when you created your email account.

Host	The name of a server or group of servers handling your incoming email. You can find your hostname by consulting your IT Manager or accessing your provider's web page.
Port	The port on the incoming email server is open to communicate with other email servers. You can find your port by consulting your IT Manager or accessing your provider's web page.
SMTP Host	The name of an SMTP server or group of SMTP servers handling your incoming email. You can find your hostname by consulting your IT Manager or accessing your provider's web page.
SMTP Port	The SMTP port on the incoming email server is open to communicate with other email servers. You can find your port by consulting your IT Manager or accessing your provider's web page.
Connection Timeout (ms)	The amount of time you would like the system to wait when connecting to the email account.
Read Timeout (ms)	The amount of time you would like the system to wait when retrieving email from the email account.

If the Type is Microsoft, the Email Configuration Tab will have the following fields:

Field Name	Description
Username	The username you chose when you created your email account.
Password	The password you chose when you created your email account.
Microsoft Azure Tenant ID	Identifier of the Azure Solution, hosting the Registered Application.
Microsoft Azure Client ID	Identifier of the Azure Registered Application to be used to connect to the Microsoft Graph API and send/receive emails using this account.
Microsoft Azure Client Secret	A secret string is used by the Registered Application to prove its identity when requesting a token.

To use OAuth client ID credentials to configure a Microsoft Outlook email account, operate via the Microsoft Graph API in the Information tab, set the “Type” field to Microsoft Client ID. In the Email Configuration tab, enter the “Microsoft Azure Tenant Id”, “Client Id,” and “Client Secret” obtained from an Azure registered application.

NOTE: After saving the email account with the changes described previously, it’s important to click on the Microsoft Graph Icon in the top right of the screen. This will open a pop-up window where users will be prompted to

select an account to login with. The selected account must be the same as the one configured in the Nextiva UI.

If the Type is POP3S, the Email Configuration Tab will have the same fields as the IMAPS type.

If the Type is Sendgrid, the Email Configuration Tab will have the following field:

Field Name	Description
Sendgrid Key ID	Sendgrid Key is a unique identifier that authenticates requests associated with the Sendgrid account.
Sendgrid Sender Name	Customers will see the name associated with the email account as the account that originated the email messages.

If the Type is SMTP + TLS, the Email Configuration Tab will have the same fields as the IMAPS type without the SMTP fields.

If the Type is Gmail Client ID, the Email Configuration Tab will have the following fields:

Field Name	Description
Gmail Client ID	The Gmail Client Id was obtained from a Google Cloud Platform OAuth 2.0 Client ID credential.
Gmail Client Secret	The Gmail Client Secret is obtained from a Google Cloud Platform OAuth 2.0 Client ID credential.

If the Type is Gmail Service Account, the Email Configuration Tab will have the following field:

Field Name	Description
Credentials	Credentials from a Google Service account were created using the Google Gmail API.

NOTE: The email address configured in the Nextiva UI must exist within the domain of the Google project.

Assigning an Email Account to a Campaign

After you have completed creating an email account, you must assign it to a campaign so that the system can begin routing emails.

Under **Campaigns**, select the campaign and scroll down to the email account located under Address. Select the **File** icon to the right of the email account and select the email account to assign to the campaign. Click **OK**.

Endpoints

A user set to use Endpoints will be prompted upon logging into a computer to select the SIP or PSTN phone on which they would like to receive calls. The user will be presented with a list of Endpoints to choose from, so care should be taken when creating these so that the name and description make it easy to understand which endpoint it is.

Creating an Endpoint

Search for **Endpoint** in the options menu. Click **Plus (+)** and fill out the required information.

Information Tab

Field Name	Description
Name	The name of the endpoint.
Description	The description of the endpoint.
Endpoint Type	The type of endpoint. The available types are PSTN and SIP.

Endpoint Tab

If the Endpoint Type is set to SIP, the Endpoint Tab will have the following fields:

Field Name	Description
Username	The username you wish to assign to your SIP device.
Password	The password must be at least 12 characters long and include An uppercase letter, lowercase letter, and number.
SIP Address	The SIP address is username@domainName. (Nextiva will give the domain name upon request.)

If the Endpoint Type is set to PSTN, the Endpoint Tab will have the following field:

Field Name	Description
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Address	The PSTN number to be used in the endpoint.
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ETL

ETL (Extract, Transform, and Load) allows data from multiple sources to be combined in a single location. In Nextiva, an ETL is an object that can copy over the tables from MongoDB to Google BigQuery. The MongoDB database holds the active objects (campaigns, users...), whereas Big Query records past items (mostly workitems) for reporting purposes.

Copying over schema types (tables) allows the current configuration of objects such as campaigns, users, consent, surveys, and many others to be used in standard SQL queries for reporting purposes. You can use these in the Generic Query type Reports.

Creating an ETL

Search for **ETL** in the options menu. Click **Plus (+)** and fill out the required information.

Information Tab

Field Name	Description
Name	The name of the ETL.
Description	The description of the ETL.
Type	For running jobs, this provides a copy of an object in Nextiva in a MongoDB table and moves it to a Google Big Query table.
Schema	Select the schema types (Nextiva native objects) you want to copy into Google BigQuery.
Time	This is the Business Event defining when the tables will be copied over. Time events inside here must be of type "Job".

Workflows

Search for **Workflow** in the options menu. Click **Plus (+)** and fill out the required information.

Information Tab

Field Name	Description
Name	The name of the workflow.
Description	The description of the workflow.

Workflow Option Tab

Field Name	Description
Final State Customer Hangup	When the customer hangs up the phone, what do you want to happen to the call. For example, a function or terminating the call.
Maximum Number of Workflow Actions	After the maximum number of workflow actions, the workitem will terminate.
Final State Agent Hangup	For an agent to hang up, you select what you want to happen to the call. For example, a function that does a survey or terminating the call.

Campaigns Tab

The Campaigns tab will show where the following workflow is assigned.

Workflow Tab

The Workflow tab is where the workflow will be created. Please reference the Workflows category for more detailed Workflow Actions and Components documentation.

Lists

A list is an object that holds a list of leads. Once a list is uploaded to a campaign, it can be found in a List object, where descriptions of the actions carried out on the leads can be found. Several metrics are displayed inside the list object, describing

the completion stage, the number of callbacks, errors, leads still to be dialed, and details regarding the list upload.

There are six tabs in the object:

- The information tab holds the list details, such as name, campaign, and the bigquery table with the leads.
- The Upload Select tab contains a series of choices for uploading in the campaign section.
- The Options tab has a toggle to activate or deactivate the list and a drop-down to assign a weighting to the list out of all the campaign's lists.
- The Filter tab has three fields. The first is to select a filter object, which may be configured separately. This is a SQL "WHERE" clause that applies to the leads and is used to select the leads to be dialed. The other fields display the filter in question and any possible filter at the campaign level.
- The Summary and Filter Summary tabs display data totals of the current state of the list.
- The Leads tab has a search bar to search for leads in the list. This will display the leads in a table where details of the actions can be found. Leads can also be searched by the lead ID. Right-clicking on a lead will also provide a few more options: View Call Attempts, Reset Lead, Forward Lead to Agent and Remove from List.

Creating Lists

Lists should be created in the Campaign List section in a Campaign Object.

Information Tab

Field Name	Description
Identifier	The ID that was automatically assigned to this list upon its creation.
Name	The name that was entered to the list when it was uploaded.
Description	The description that was entered when uploading the list.
Campaign Identifier	The ID that was automatically assigned to the campaign upon its creation is under which this list was created.
Status	Specifies whether the list has been successfully uploaded or not.
Table Name	The table's name in the BigQuery database used for this list contains the data relative to the leads. There are three associated tables: Failed, holds the failed leads. Res holds the result actions. Time contains lead timezone information.

Upload Selection Tab

Field Name	Description
Uploaded File	The name of the file that has been uploaded.

Type	The upload type selected in this campaign. This is the strategy taken on duplicate records in the list: <ul style="list-style-type: none"> • Check duplicate phone numbers across all lists – Removes duplicates from the current list. • Check duplicate phone numbers across the current campaign – Removes duplicates from the current list.
SMS	Determines whether or not the list uses the SMS actions from the campaign. When enabled, the dialer sends SMSs rather than calls.
Workflow	Determines whether the campaign workflow should be used or not.
Scrub Federal DNC	The number of leads scrubbed from the Federal DNC list.
Scrub Reassigned Numbers	The number of leads scrubbed from the Reassigned list.
Opt-In Only	When enabled, the dialer will only use the leads whose consent is set to Opt In (inside Opt-Ina tables).

Options Tab

Field Name	Description
Active	When enabled, the list is active. Can be enabled/disabled here or in the campaign.
List Weighting	The weight assigned to the list relative to the other lists in the campaign.

Filter Tab

Field Name	Description
Filter	Select a filter from the filter object to apply to this list only.
Filter	Read-only field that displays the Filter selected in the previous field.
Campaign Filter	The filter that is applied to the list from the campaign. At the campaign level, the filter applies to all lists. This field displays any if it exists.

Summary Tab

Field Name	Description
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Total Leads	The number of leads that were initially uploaded successfully into the list.
Completed	The number of leads that have been completed and will not be redialed.
Max Attempts	The number of leads that have been dialed the maximum times allowed, configured in the campaign, and will not be dialed anymore.
Percentage Done	The percentage of numbers completed or removed from list.
Never Dialed	The number of new leads that still need to be dialed. This value also includes any callbacks or errors that have been reset.
Never Dialed Now	The number of leads that have not been dialed but are queued to dial now.
Never Dialed 30	The number of leads that have not been dialed but are queued to dial in 30 minutes.
Never Dialed 60	The number of leads that have not been dialed but are queued to dial in 60 minutes.
Callbacks	The total number of leads scheduled to be called back.
Callbacks Now	This value displays, out of all the currently scheduled callbacks, how many have reached or passed their scheduled date and are queued up now.
Callbacks 30	Number of leads that have not been dialed but are queued to dial in 30 minutes.
Callbacks 60	Number of callbacks that are queued to dial in 60 minutes.
Errors	The number of leads that failed to dial out. These leads will be automatically scheduled to be called back if they have not reached their maximum attempts.

Filter Summary Tab

Field Name	Description
Never Dialed	The number of leads that still need to be dialed.
Never dialed now	The number of leads that have not been dialed but are queued to dial now.
Never dialed 30	The number of leads that have not been dialed but are queued to dial in 30 minutes.

Never dialed 60	The number of leads has yet to be dialed, but they are queued to dial in 60 minutes.
Callbacks	The total number of callbacks that have not been dialed.
Callbacks Now	The number of callbacks that are queued to dial now.
Callbacks 30	The number of callbacks that are queued to dial in 30 minutes.
Callbacks 60	The number of callbacks that are queued to dial in 60 minutes.

Leads Tab

The Leads Tab shows a view of the leads and information associated with each lead in a list. You can see the attempts made in each list as well.

Load Objects

Load Objects is used to import large amounts of objects into Nextiva. For example, contacts, users, or consent are often defined in an external database and are desirable to copy in a batch. Load Objects uses field mapping to map the headers of a CSV file to the fields in Nextiva native objects. A successful loading of objects can save a lot of time.

Creating Load Objects

Search for **Load Object** in the options menu. Click **Plus (+)** and fill out the required information.

When uploading objects, it is recommended that you create a field mapping with your CSV. This will ensure that the fields for the uploaded objects are mapped correctly.

Upon saving, the Load Objects will execute, and a set of logs will be displayed as a result of the upload.

Information Tab

Field Name	Description
Name	The name of the Load Objects.
Description	The description of the Load Objects.
Field Mappings	The Field Mapping is to be used to select which objects are being loaded into Nextiva.

Type	<p>The type of loading that is desired. There are two options:</p> <ul style="list-style-type: none"> • Drop and Insert • Insert, Update, Delete <p>Drop and Insert is used when it is the first load objects or when it is desirable to replace all objects. This will drop the table of records and insert the new values.</p> <p>Update, Insert, and Delete are flexible enough to determine and update whether a record exists. If the record does not exist, then it just inserts it. This method can also delete records if a deleted parameter is passed with a UNIX time in milliseconds. To use this method efficiently, you must pass the identifier or unique key of the updated object.</p>
Uploaded File	<p>The CSV contains the list of records to be imported and defines the mapping between the fields of the CSV and the Nextiva native object.</p>

Upload Result Tab

Field Name	Description
Filename	The name of the uploaded file.
Transaction Id	The unique identifier of the insert operation.
Created At	The timestamp of the operation.
Total In File	The number of rows detected in the file.
Total Inserted	The number of new rows inserted into the database.
Total Updated	The number of preexisting records that have been updated.
Total Deleted	The number of records deleted.
Total Exists	The number of existing records.
Total Failed	The number of records that failed to be inserted. Check the Error Report object for additional details on these.

No Recording

When you add a number to the No Recording list, it will not be recorded in campaigns that have automatic recording. This means that if a call with a number on this list is made during such a campaign, it won't be recorded. If an agent tries to record a call with a number on this list, they will receive a warning.

Creating a No Recording

Search for the **No Recording** icon in the Options Menu. Click **Plus (+)** and enter the required information below. Click **Save** when done.

Field Name	Description
Name	The name of the No Recording.
Description	A description of the No Recording.
Number	The number to which to apply the No Recording.

Regex

Regular Expressions (Regex) follow the worldwide standard for searching strings for specific sequences or patterns of characters. These can be used to find or find and replace parts of sentences and expressions. Regex objects are used across the application to force the strings' structure in places such as survey inputs, passwords, etc.

Creating a Regular Expression

Search for the **Regex** icon in the Options Menu. Click **Plus (+)** and enter the required information below. Click **Save** when done.

Information Tab

Field Name	Description
Name	The name of the regular expression.
Description	The description of the regular expression.
Expression	The regular expression to match on.
Error Message	The message is presented when an input does not match the regular expression.

Region

Regions contain area codes and outbound hours objects, which determine when calls can go out to numbers in these regions.

Creating a Region

Search for the **Region** icon in the Options Menu. Click **Plus (+)** and enter the required information below. Click **Save** when done.

Information Tab

Field Name	Description
Name	The name of the region.
Description	The description of the region (optional).
Type	This is the type of region you are defining. This has three values: area code, country, or state.
Code	The two-letter code for states. This is a short string describing the region.
Monitoring	Either one party or two parties. This describes whether permission for recording needs to be granted by one or two parties (Agent and customer).

Restricted Call Dates Tab

Field Name	Description
Restricted Dates	This is a Business Event that contains dates for which calls are restricted. A warning will be shown when outbound dialing a number in this region. Predictive and Progressive Calls will be blocked by the dialer.
State of Emergency	Works similarly to restricted dates but can only be set to true or false. When true, the warning or dialer will not be present.

Area Codes Tab

The Area Codes tab contains the area codes for the region.

Outbound Hours Tab

The Outbound Hours tab lists weekday hours inside which the region can be dialed.

Configuring Services

A service in Nextiva is used to integrate 3rd-party functionalities into the application. Some of the most common examples are text-to-speech, transcription, or conversational bots. These services are first designed for integration by an engineer, and then a Service object is created to link the code up to the appropriate functionality. For example, text-to-speech is a feature enabled on a tenant's GCP. However, it cannot be used until Nextiva has enabled the service.

There are a few service providers that Nextiva integrates with, most notably Google, as this is where Nextiva gets its transcription, tone analysis, DLP, and text-to-speech features.

Creating Services

Search for the **Service** icon in the Options Menu. Click **Plus (+)** and enter the required information below. Click **Save** when done.

Information Tab

Field Name	Description
Name	The name of the service.
Description	A description of the service.
Provider	The provider of the service.
Type	The type of service. NOTE: Not all service types are provided by all providers. Generally, the type is provider-specific. The current types are Azure, Catasys, Deepgram, DNC, FREESWITCH, Freshdesk, Google, IBM, Moneris, Slack, and Telnyx.
Enabled	Switch the toggle on to enable the service.

Parameters Tab

Depending on the service being enabled, it may be necessary to provide parameters to the service. This is a set of key-value pairs that pass variables in the headers of API calls to third-party systems.

Credentials Tab

Credentials of a particular service can be attached to the object. These are on a JSON file that is uploaded and contains details of the third-party service. It is used to distinguish the service account called by that service object when multiple services of similar nature are created in the same tenant.

SIP Credentials

SIP credentials are used to create the SIP account to register an SIP device that can be used as a user's phone.

Creating/Modifying a SIP Credential

Search for the **SIP Credential** icon in the Options Menu. Click **Plus (+)** and enter the required information below.

Information Tab

Field Name	Description
Username	The username you wish to assign to your SIP device.
Password	The password must be at least 12 characters long and include uppercase letters, lowercase letters, and a number.
List Identifier	The Credentials List is to be used with this SIP device.

SIP Domains

SIP Domains are authorized to send and receive SIP traffic. To enable certain domains to do so, you need to add them to the SIP Domains object.

Creating SIP Domains

Click **Plus (+)** and enter the required information below. Click **Save** when done.

Field Name	Description
Name	The name of the SIP Domain.
Domain Name	The URL of the SIP Domain.
Authentication Type	The type of authentication to use is Credentials List or IP Access List.
List Credentials	The list of SIP Credentials.
Ip Access Lists	The selection of IP Access Lists.

Skills

Skills are essential for skill-based routing.

Creating a Skill

Search for **Skills** in the options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Name	The name of the skill. NOTE: Clicking on the globe icon will allow the name to be entered in different languages.
Description	The description of the skill. NOTE: Clicking on the globe icon will allow the description to be entered in different languages.

Users Tab

Once a skill has been saved, users can be assigned to that skill and workflows to have the ACD use skill-based routing to route calls more efficiently to the appropriate users within a queue.

Third-Party Skills

This feature allows the system to route dialer calls to available non-dialer agents based on specific skills. The third-party skills would match a field in the field mapping to load the lead into the dialer list. The dialer will check for available agents

with third-party skills before dialing the lead. If no agents are available with the third-party skill, it will not call the lead and will wait for a configurable amount of time before calling again.

NOTE: If no agents are available, Nextiva won't go through the list and mark the lead as third-party skills, which sets the callback date for 24 hours.

Third Party Skills Tab

Field Name	Description
Minimum Available Users For Third-Party Skills	How many users must have the Third Party skill before dialing starts with the Third Party Skills.

First-Party Skills

First Party Skills are defined as skills-based routing for Progressive agents. Leads with the assigned skill are only presented to agents with the First Party Skill. If a lead has no associated skill, it will be presented to the longest available agent regardless of skill.

Like third-party skills, first-party skills are uploaded from a field in the leads' file containing the skill. This is done by mapping a field in the field mapping to a field in the leads' file.

In the **Campaign** object, in the **First Party Skills** tab, under "Field used for First Party Skill", you select the field from the Field Mapping used when importing the file.

NOTE: The skill must be created and valid to work.

Creating a status

Search for the **Status** icon in the Options Menu. Click **Plus (+)** to the right of the Search field. Enter the required information under each tab.

Information Tab

Field Name	Description
Name	The name of the status. NOTE: Clicking on the globe icon will allow the name to be entered in different languages.
Description	The description of the status.

	NOTE: Clicking on the globe icon will allow the description to be entered in different languages.
Status	The name of the status.
Present Status to User	If enabled, the user will be able to select this status from the list that is presented when a user manually sets his status.

Teams Tab

The Teams Tab is where you will select an activity. The possible activities are:

- Available
- Away
- Be Right Back
- Busy
- Do Not Disturb
- In A Call
- In A Conference Call
- Inactive
- In A Meeting
- Offline
- Offwork
- Out of Office
- Presence Unknown
- Presenting
- Urgent Interruptions Only

Template

Templates are a way to present contextually relevant information to users when handling workitems. A template may contain an answer to frequently asked questions and common objections or present the user with a web link to forward to customers.

Search for the **Template** icon in the Options Menu to create or modify a template.

Creating a Template

Click **Plus (+)** next to the search bar. The configuration page will have the following tabs: Information, Options, and Script.

Information Tab

Field Name	Description
Name	The template's name.

Description	The description of the template.
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NOTE: Click on the **Globe** icon to enter in various languages.

Options Tab

Toggle Button	Description
Use for Email Template	If enabled, users will view this template when handling an email workitem.
Use for Chat Template	If enabled, users will view this template when handling a chat workitem.
Use for SMS Template	If enabled, users will view this template when handling an SMS workitem.
Use for Assistance Template	If enabled, this will be the default message sent from agents to supervisors when an agent clicks on the Assistance icon in the navigation bar.

Script Tab

This is where you enter the template text you want to present to the user handling the workitems. This could be plain text, an HTML link, an image, or a combination.

NOTE: Some workitem types may not support all kinds of formatting. For example, images won't appear when you send an SMS.

Assigning a Template to a Campaign

After creating a template, you must assign the template to campaigns so that users can view the templates.

1. Go to the **Campaigns** section and select the campaign.
3. Scroll down to the **Response Templates** section and click **Plus (+)** on the right side.
5. A pop-up window will appear with a list of Response Templates. Choose one or more templates from the list and click **OK**.

Now, when a user logs in and has an active work item for this campaign, they can select an appropriate template from the list.

NOTE: Templates will only display on workitems if the template is selected from the Options tab.

Temporary DNC

Temporary DNCs are consent records that include an expiry date. An address will be considered Do Not Call until the expiry has passed. This works with the Consent Object in Nextiva. It can be uploaded manually or using Load Objects (CSV). The maximum number of records a Temporary DNC object can hold is 300,000 records.

Creating a Temporary DNC

Search for **Temporary DNC** in the options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Name	The number to be considered is “Do Not Call”.
Restriction	The Restriction Field has the following options: <ul style="list-style-type: none">• Block All – Blocks all outbound calls and displays the warning message or plays the warning prompt.• Block Manual Calls – Blocks only outbound calls from the Dial Pad and Contact and displays the warning message.• Block Predictive and Warning for Manual Calls – Blocks all predictive calls, displaying the warning message, but manual calls go out, and the warning message is also displayed.• Block Predictive Dialer – Blocks all predictive calls displaying the warning message• None – The restriction to which the record defaults after the expiry date. (All calls will go out.)• Warning – Allows the calls to go out but displays the warning message or plays the warning prompt.
Campaign	The campaign that you would like this consent to apply to. If none is set, then it applies to all campaigns.
Expires After	The date and time of the expiry.

Message Tab

Field Name	Description
Message	The warning message is to be displayed to the agent.
Duration	The time for which the warning message is visible.
Prompt	The prompt will be played on the agent’s headset.

Tenant

The Tenant object is only visible to the system administrators and holds information that is applied globally to the application.

Information here can be modified to suit the company's needs as it evolves. Though some default settings are applied on creation, it can be helpful to revise and tweak these.

Modifying a Tenant

Search for **Tenant** in the options menu and select the tenant you wish to modify. The tenant will have several tabs with fields that can be modified.

Information Tab

Field Name	Description
Name	The name of the company.
Description	The description of the company.
Slogan	The company's slogan.
Email Address	The primary email address for the company.
Language Identifier	The default language for the company.
Timezone	The default timezone of the company.
Session Timeout	The amount of time with no activity, in milliseconds, for a user's session to be automatically logged out.
Extension Range	Digit extensions for agents. If empty, the default is "100 – 99".
Default Inbound Campaign	A default campaign to use when an inbound call is not associated with a campaign.
Default Country Code	The country code where the tenant is located. The country code of the tenant will not have to be dialed when dialing in the same country.

Recording Tab

Field Name	Description
Enable MP3 Recordings	If enabled, recordings in the application will automatically be saved as .mp3 files. The default when disabled is .wav files.
Keep Recordings in Twilio only	If enabled, this will keep the call recordings in Twilio instead of Nextiva.
Expiry	Sets how long the recordings are kept in Twilio or Nextiva.

Queue Tab

Toggle Button	Description
Reset queue idle time overnight	This enables the ACD to reset the idle time values for the queues each night.

Dashboards Tab

Field Name	Description
Group Wallboard Totals	Wallboards display rotating information for the queues that agents are signed in on. Enabling this toggle will group all the values into a single line that doesn't rotate.
Show Logged Out Users	Shows the number of agents assigned to a queue but not logged in to the queue on the dashboard.
Write to RealTime Tables	If enabled, write dashboard information to Google BigQuery.

Voicemail Tab

Field Name	Description
Voicemail Function	This is the function that will be used when using the voicemail feature.
Voicemail Greeting Function	This is the function that will be used to record your voicemail greetings.
Disable Voicemail Notification	Disables notification of unread voicemails on the user's homepage.

Workitems Tab

Field Name	Description
Voice Max Duration In Hours	How long the system will allow a voice workitem to remain within the system. When the max duration is reached, the workitem will be terminated.
Chat Max Duration In Hours	How long the system will allow a chat workitem to remain within the system. When the max duration is reached, the workitem will be terminated.
SMS Max Duration In Hours	How long the system will allow an SMS workitem to remain within the system. When the max duration is reached, the workitem will be terminated.

Email Max Duration In Hours	How long the system will allow an email workitem to remain within the system. When the max duration is reached, the workitem will be terminated.
Social Max Duration In Hours	How long the system will allow a social workitem to remain within the system. When the max duration is reached, the workitem will be terminated.

Security Tokens Tab

Field Name	Description
Token Id	This will tell whether the security token is a Salesforce or Nextiva token.
Name	The name of the token.
User Profile Identifier	The profile whose permissions the token will carry. Lower profiles have less permissions.

Facebook User Tokens Tab

Adding a Facebook user token opens an emerging window and prompts users to sign in to a Facebook account. This will load the credentials for that account for use in the Facebook integration.

Facebook Page Tokens Tab

Adding a Facebook page token opens an emerging window and prompts users to sign in to a Facebook account. This will load the credentials for that account for use in the Facebook integration.

Twitter User Tokens Tab

Adding a Twitter user token opens an emerging window and prompts users to sign in to a Twitter account. This will load the credentials for that account for use in the Twitter integration.

OAuth Tab

This information is used in Microsoft single sign-on applications for a Microsoft Dynamics or Teams integration.

Field Name	Description
Provider	Microsoft. In the future, more may be added.
Base URL	The base URL to which the sign-on will point. This will be based on the Microsoft license that has been acquired.
Verified Domain	The domain of the Microsoft integration.
User Profile	The type of Microsoft profile will determine the access rights for signing in.

Queue	Microsoft queue in teams application.
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Google Single Sign-On Tab

Toggle Button	Description
Enable Single Sign-On	If enabled, you can log in to Nextiva using Google Single Sign-On instead of a user using a password.

Azure Single Sign-On Tab

Field Name	Description
Enable Single Sign-On	If enabled, it allows you to log in to Nextiva using Azure's Single Sign-On instead of a user having to use a password.
Azure Client ID	The unique Application ID was created when your Azure application was registered with Microsoft.
Azure Tenant ID	The ID of the tenant an Azure application is created in.
Azure Client Secret	A secret string known by OAuth to authenticate Single Sign-On.
Azure User Lookup Field	The field to look up users in Azure.

Salesforce Single Sign-On Tab

Field Name	Description
Enable Single Sign-On	If enabled, it allows you to log in to Nextiva using Salesforce Single Sign-On instead of a user having to use a password.
Salesforce Client ID	The unique Application ID was created when your Salesforce app was created.
Salesforce Client Secret	A secret string known by OAuth to authenticate Single Sign-On.
Salesforce Instance URL	The URL where your Salesforce app is.
Salesforce User Lookup Field	The field to lookup users in Salesforce.

ServiceNow Single Sign-On Tab

Toggle Button	Description
Enable Single Sign-On	If enabled, it allows you to log in to Nextiva using ServiceNow Single Sign-On instead of a user having to use a password.

Contact Tab

The Contact tab allows the display of Salesforce object contact information inside Nextiva. Now, administrative users can create, read, update, and delete Salesforce contacts by accessing the Contact object in Nextiva.

To configure this, an administrative user must go into the **Tenant** object, go to the **Contact** tab, and select the type of contacts this tenant will use. Selecting **Salesforce** will show the necessary fields where information from a Salesforce Connected app should be entered. Nextiva currently supports the OAuth password grant_type, so a valid username and password will be required.

Field Name	Description
Type	The type of contact. (Nextiva or Salesforce)
Salesforce Instance URL	The specific server instance of Salesforce being used.
Salesforce Version	The version of Salesforce being used.
Grant Type	The grant type for OAuth, currently only password is supported.
Salesforce Client Id	The client id of the Salesforce contact.
Salesforce Client Secret	The client secret of the Salesforce contact.
Username	The username of the contact in Salesforce.
Password	The password of the contact in Salesforce.

NOTE: Specific schema types and layouts must be implemented for your tenant. Please contact Nextiva support if this functionality is necessary for you.

Slack Alarms Tab

This tab must be configured to send customized notifications through a Nextiva dashboard to Slack.

Field Name	Description
URL	Default value: https://slack.com/api/chat.postMessage
Security Token	This corresponds to a Slack token obtained in the OAuth & Permissions section of an app created following the Slack documentation.
Security Channel Name	The name of a channel as it is presented in the Slack user interface, for example: slack-api-test.

Microsoft Team Alarms Tab

This tab must be configured to send customized notifications through a Nextiva dashboard to Microsoft Teams.

Field Name	Description
URL	Default value: https://graph.microsoft.com/v1.0 .
Tenant ID	Corresponds to the Tenant ID in an application under App registrations in the Azure Portal.
Client ID	Corresponds to the Client ID in an application under App registrations in the Azure Portal.
Client Secret	Corresponds to the Client Secret in an application under App registrations in the Azure Portal.
Authentication Username	Corresponds to a user account to be logged into, following the grant-type “password” in OAuth Requests to the Microsoft Graph API.
Authentication Password	Corresponds to a user account to be logged into, following the grant-type “password” in OAuth Requests to the Microsoft Graph API.
Team ID	Corresponds to a specific Team ID within Microsoft Teams.
Channel ID	Corresponds to a specific Channel ID within Microsoft Teams.

OAuth Mapping Tab

This tab maps to the fields in the OAUTH user object if you want Nextiva to override the user profile and queue to which the agent belongs.

Field Name	Description
User Profile	The mapping field for the user profile you want to override.
Queue	The mapping field for the queue you wish to override.

OAuth Sign-Up Tab

This tab allows you to automatically create users in Microsoft Teams when they are created in Nextiva.

Field Name	Description
Automatic User creation	Enable this toggle for automatic user creation.
User Profile Identifier	Select the user profile in Nextiva for which users will be created in teams.

Queue	Select the queues that are to be mapped to teams.
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Teams User Access Token Tab

The Teams User Access Token tab holds specific information regarding Microsoft integration. This will map the tenant to the Microsoft Teams instance.

Field Name	Description
URL	The URL of the Microsoft Teams tenant.
Client ID	The ID of the Microsoft tenant.
Client Secret	The secure passphrase enables the connection to the Microsoft tenant.
Grant Type	The type of connection that will be established with Microsoft Teams.
Scope	The scope of the Teams integration.
Authentication Username	The username of the service account of the integration that will establish the connection.
Authentication Password	The password of the service account of the integration that will establish the connection.
Presence Subscription URL	The URL used when Teams is synced to Nextiva statuses.

NOTE: For more information about single-sign-on and third-party applications, please refer to the Integration Documentation

Teams App Access Token Tab

The Teams App Access Token tab holds specific information regarding Microsoft integration. This will map the tenant to the Microsoft Teams instance.

Field Name	Description
URL	The URL of the Microsoft Teams tenant.
Client ID	The ID of the Microsoft tenant.
Client Secret	The secure passphrase enables the connection to the Microsoft tenant.
Grant Type	The type of connection that will be established with Microsoft Teams.
Scope	The scope of the Teams integration.

Microsoft Base URL	The base URL to which the sign-on will point to in Microsoft.
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Outbound Tab

Field Name	Description
Number of Most Recent Outbound Lists to Check Against	Set the maximum number of lists to search on when searching across all lists to find a lead or remove duplicates when uploading a new list.

ACD Tab

Field Name	Description
Maximum Workitems Queued	Limits the number of workitems in a queue. The minimum is 500 workitems, and the maximum is 10000 workitems.

Prompt Tab

Field Name	Description
DNC Prompt	Plays a prompt to an agent on an audio device trying to dial a phone number that is either on the Do Not Call or Temporary Do Not Call list.

Webhook Workitem Events Tab

Field Name	Description
Enable Workitem Webhook	If enabled, Nextiva will call the webhook whenever an event happens in the workitem.
Enable Workitem URL	The URL of the webhook.

Webhook Workitem Headers Tab

The Webhook Workitem Headers Tab is where to add the headers to pass when making webhook events.

Webhook Status Events Tab

Field Name	Description
Enable Status Webhook	If enabled, Nextiva will call the webhook whenever a user changes their status.
Workitem Webhook URL	The URL of the webhook.

Webhook Status Headers Tab

The Webhook Status Headers Tab is where to add the security header to pass when making webhook status events.

Outbound ANI Tab

The Outbound ANI tab is for integrating Outbound ANI with Nextiva. If you want to integrate with Outbound ANI, it's used to give the ANI, which is the from number when dialing out manually, or progressive/predictive dialing.

Field Name	Description
URL	The URL used to get multiple ANIS at the same time.
Security Token	The HTTP security token for authentication.
Single API URL	The URL used to get one ANI at a time.
Single API Token	The token used for authentication to use the API.
REST API	You need to create the REST API that connects to Outbound ANI. This will inform outbound ANI of the ANI use when Nextiva dials out so it can be reported.

Google Script Config Tab

The Google Script Config Tab is used when you want to enable Google Looker to be visible inside the Nextiva interface.

Field Name	Description
Google Script URL	This will be given by a Nextiva administrator to enable Google Looker in the Nextiva interface.

Call Connection Beep Tab

Toggle Button	Description
Enable Call Connection Beep	Used for when agents are working off-hook. If enabled, the Call Connection Beep plays a tone to indicate to the user that they are now connected to another individual.
Disable Call Connection Beep	The agent is connected on a call, and the other party disconnects. If enabled, the agent will receive a tone indicating a call has been terminated.

NOTE: These are both in addition to the visual notifications.

Theme

Themes are a vital way to customize the look and feel of the Nextiva application, particularly its surveys. Since surveys can face customers or agents, ensuring the colors and styling match your brand may be essential. Nextiva allows you to customize your own theme and gives you some pre-designed ones to help you get started faster.

The application comes with predefined themes:

- Basic
- Pale Berry
- Pale Blue
- Pale Green
- Pale Purple
- Plain Berry
- Plain Blue
- Plain Green
- Plain Grey
- Plain Purple

Creating a Theme

Search for **Theme** in the options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Name	The name of the theme.
Description	The description of the theme.

Theme Tab

When creating a new theme, the base theme colors will appear according to the property name, and you can adjust the colors for a specific property. A color chooser pop-up will appear when you click on the color box on the right of the property, allowing you to select the color needed.

Topics

Topics are used and created in the Company Directory to send private messages to a specified group of users, thus creating a space for conversations on different topics.

Creating Topics

Search for **Topics** in the options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Name	The name of the topic.
Description	The description of the topic.

Outbound Hours

Outbound Hours are the hours a company can dial out and set in the tenant's time zone.

Creating Outbound Hours

Search for **Outbound Hours** in the options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Name	The name of the outbound hours.
Description	The description of the outbound hours.
Open	The time at which the outbound hours start.
Close	The time at which the outbound hours end.
Day	The day of the week for these hours.

NOTE: You must set up separate outbound hours for each day of the week.

NOTE: To use outbound hours for call routing, you need to set up operating hours verification in your campaign workflow.

Regions Tab

The Regions Tab is where you select the regions for which the outbound hours will apply.

User Surveys

User Surveys have multiple functionalities in Nextiva but are essentially canvases with form data. They are one of the most flexible objects in the application and can be used to design dynamic agent scripts, input Web Forms for a client page, or even to load and display information from external systems.

User Surveys take a variety of inputs: form fields, sliders, raters, or radio buttons, and by applying a series of rules, they can execute actions, APIs, such as exchanging information with third-party systems, creating callbacks, initiating chats, and much more.

Creating User Surveys

Search for **User Surveys** in the options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Name	The name of the user survey.
Description	The description of the user survey.
Survey Type	The type of survey. The current types of surveys within Nextiva are Icon and Full page.
Themes	The color theme for the survey. Click the list icon to see the full list of themes available.
Fonts	The font that the survey will be presented in. Click the Arrow icon to see the full list of fonts available.
Entry Panel	Select the Survey panel that will be the starting panel when the survey is loaded. The survey requires at least one panel.
Debug information	Select this toggle to debug information for the survey.

Dimensions Tab

Field Name	Description
Height	A slider to set the height of the survey.

Width	A slider to set the width of the survey.
-------	--

User Survey Tab

The User Survey Tab is where the survey is created and shows the entire User Survey once created.

Right Party Contact (RPC)

Right-party contact is when attempting to contact and reach the person you intended to. The Right Party Contact object in Nextiva allows you to save information about the intended contact and configure settings for how to deal with workitems with them.

Creating a RPC

Search for **RPC** in the Options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Name	The name of the RPC.
Description	The description of the RPC.

Dispositions Tab

In the Dispositions Tab, you will select dispositions to be used with the RPC. Click **Plus (+)** to add disposition.

Callbacks

The Callbacks object is available to supervisor and admin users. It is a list of the callbacks currently registered in the system, extracted by query of a date range from the callbacks table in BigQuery. Changing the date range for which Callbacks may be viewed from the filter icon, alongside searching for specific users, queues, or campaigns to which Callbacks are assigned, is possible. It has the most useful tools for handling future Callbacks.

A supervisor may modify the callback in the system to change the callback date and time or modify the user or queue to which this callback may be presented.

Zip/Postal Code

Nextiva automatically maps all the Postal Codes in North America to their corresponding Area Codes. This can be used with the Region object to find where a Postcode originates.

NOTE: It is not currently possible to add to this list.

Contacts

Contacts contain information about the contact, such as the contact's name, address, phone number, email address, and notes. The Contact section allows you to create, edit, and view contact records.

Creating Contacts

Search for the **Contact** icon on the options menu. Click **Plus (+)** and fill out the required information under each tab. Click **Save** when done.

Information Tab

Field Name	Description
First Name	The contact's first name.
Last Name	The contact's last name.
Address	The contact's address.
Address 2	The contact's address.

City	The city in the contact's address.
State	The state in the contact's address.
Zip Code/Postal Code	The zip/postal code in the contact's address.
Country	The contact's country.
Timezone	The time zone the contact is in.
Email	The contact's email address.
Phone	The contact's main phone number.
Mobile	The contact's mobile phone number.
Fax	The contact's fax address.

Preferences Tab

Toggle Button	Description
Email Preference	Enable it if the contact prefers to receive email communications.
Chat	Enable it if the contact prefers to receive Chat communications.
Voice	Enable it if the contact prefers to receive voice communications.
SMS	Enable it if the contact prefers to receive SMS communications.

Notes Tab

The notes tab lists the associated contact notes created during communication with them or after-call work.

Additional Tabs

Depending on the choice of custom fields associated with the contact record, you may find additional panels containing this information.

Assigning a Contact to a Workitem

Not all incoming workitems will be associated with an existing contact record. If a workitem displays "No Contact Found" at the top of your workspace, you need to decide if you want to associate the workitem with a contact or create a new contact for this workitem.

Filters

Filters can limit the number of leads loaded into memory by Progressive or Automated Dialing campaigns. Choose filters under the dialer configuration tab to filter out leads from the campaign list.

Creating Filters

Search for the **Filter** icon on the options menu. Click **Plus (+)** and fill out the required information under each tab. Click **Save** when done.

Information Tab

Field Name	Description
Name	The name of the filter.
Description	The description of the filter.

Query Tab

The SQL WHERE clause. Example:

```
lastName = 'Doe'  
AND thrioTotalAttempts < 10  
AND city != 'New York'  
AND state = 'New York'
```

Groups

Groups are a convenient way to move teams of users from one predictive/progressive campaign to another. Think of a group as a folder for users. To avoid conflicts across campaigns, each agent can only be associated with one group.

Creating Groups

Search for the **Group** icon on the options menu. Click **Plus (+)** and fill out the required information under each tab. Click **Save** when done.

Information Tab

Field Name	Description
Name	The name of the group. NOTE: Clicking on the globe icon will allow the name to be entered in different languages.
Description	The description of the group. NOTE: Clicking on the globe icon will allow the description to be entered in different languages.

Users Tab

The Users Tab consists of the list of users associated with this group.

Scorecards

A scorecard groups classifications that detect words, sentences, or patterns in text. These can be combined in ways that make sense to the supervisor. Scorecards can also classify call topics and evaluate compliance.

Creating Scorecards

Search for **Scorecard** in the Options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Name	The name of the scorecard.
Description	The description of the scorecard.

Classifications Tab

The Classifications Tab holds the list of classifications to be included in the scorecard.

Group Numbers

The Group Numbers feature allows you to organize campaign addresses into a folder. This way, all the DIDs in a campaign can be grouped together in one place.

Creating Group Numbers

Search for the **Group Numbers** icon on the options menu. Click **Plus (+)** and fill out the required information under each tab. Click **Save** when done.

Information Tab

Field Name	Description
Name	The name of the group.
Description	The description of the group.

Number Pick Strategy Tab

The number-picking strategy is associated with a State DID option in the campaign. When necessary to rotate through the numbers in a list, a group number-picking strategy will specify which numbers get selected first.

It is possible to present numbers on

- An area code level – numbers with the same area code as the number you dial.
- A state-level – numbers with the same state code as the number you dial.
- A random strategy – a random number will be picked to be presented. This is the default if there is no matching numbers to the number that is being dialed.

Numbers Tab

The Numbers tab has the list of numbers associated with the group.

Error Report

An Error Report is an object that holds error files for back-end operations on Google Cloud. Items such as ETL and Upload objects, which execute mass operations at once and provide a report of the items it could not handle.

Creating an Error Report

Search for the **Error Report** icon on the options menu. Click **Plus (+)** and fill out the required information under each tab. Click **Save** when done.

Information Tab

Field Name	Description
Name	The name of the operation to which the error report corresponds.
Description	An optional description of the error report.

Upload Result Tab

Field Name	Description
Filename	Allows you to download the results file from Google Cloud Platform.
Total Exists	The number of records found.
Transaction Id	The unique identifier of the operation.
Total Failed	The number of items that failed.
Created At	The date/time (UTC) of the operation.

Area Code

The Area Code object is used to save specific phone prefixes for use in Nextiva. It is mostly used for American and Canadian phone numbers but can be configured for other countries as well. Area codes are saved in the Region object that uses them to apply different rules to outbound dialing.

Creating Area Codes

The Area Code object is used to save specific phone prefixes for use in Nextiva. It is mostly used for American and Canadian phone numbers but can be configured for other countries as well. Area codes are saved in the Region object that uses them to apply different rules to outbound dialing.

Information Tab

Field Name	Description
Name	The area code name. It should represent the code in string format.
Description	A description of the area code.
Area Code	The area code of the number.
Prefix	The area code-specific prefix of the numbers.

State	A two-letter representation of the state. E.g. CA for California.
Country	The country that this area code belongs to.
Timezone Offset	Integer time zone offset (From GMT).
Daylight Savings	Toggle on to apply Daylight saving to this area code.

File

The File object in Nextiva is where PNGs and GIFs can be uploaded. The uploaded files can be used as avatars, icons, or emojis.

Information Tab

Field Name	Description
Name	The name of the file.
Description	A description of the file.
File	The file itself.

Options Tab

Field Name	Description
Use as Avatar	Enable the file to be used as an avatar.
Use As Emoji	Enable to use the file as an emoji.
Use as Icon	Enable the file to be used as an icon.

Google Looker

The Google Looker object is used to create an embedded Looker Studio Report. Looker embeds dashboards and widgets into Nextiva using organized business data.

Creating a Google Looker Object

Search for **Scorecard** in the Options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Name	The name of the report.
Description	A description of the report.
Report URL	The URL of the Google Looker embedded report.

Google Script Data

The Google Script Data object is where you will create the fields for a Google Looker report or widget.

Creating/Modifying a Google Script Data Object

Search for **Google Script Data** in the Options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Data Name	The name that appears in the query for the Google Script Connector (should match fields)
Data Label	How the field should look in the report.
Data Type	The data type of the field.

Semantics Tab

Field Name	Description
Concept Type	The possible types are DIMENSION and METRIC.
Semantic Type	Semantic types help to describe the kind of information the data represents

Google Script Connectors

A Google Script Connector comprises a SQL query with parameters and a list of the data fields in the Google Script Data object. This query will be run to get the data and used to define the data fields, the data model, and more.

Creating a Google Script Connector

Search for **Google Script Connector** in the Options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Name	The name of the Google Script Connector.
Description	A description of the Google Script Connector.
Widget	Which Nextiva widget should this connector be used for. If left empty, the connector will be used in a dashboard instead of a widget. When a widget is selected, the widget's settings are used; otherwise, the user profile settings are used.

Music Library

A music library holds a list of .mp3 or .wav files that are looped over at random for queue music. The music library option may be selected in a workflow instead of the standard music option from a Play Music component.

Creating a Music Library

Search for **Music Library** in the Options menu. Click **Plus (+)** and fill out the required information. Click **Save**.

Information Tab

Field Name	Description
Name	The name of the music library.
Description	The description of the music library.

Prompts Tab

The Prompts Tab is where the list of prompts is uploaded.