Nextiva Contact Center
Agent Guide

Version 1.0

nextiva

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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.

User Interface

The user interface allows various functionalities within the Nextiva system. It consists of a navigation bar on top and a list or detail view on the bottom. You can access different functions depending on whether you are an administrator, agent, supervisor, or any other customized user profile.

The Navigation Bar

The Navigation Bar provides users with various options/functionalities. With the navigation bar, you can manage inbound and outbound workitems on different channels, transfer workitems, and put workitems on hold. You can also change your status within Nextiva Contact Center to accept incoming workitems. The navigation bar is permanent and composed of six distinct areas, giving access to different functionalities based on the profile of the user logged in.

The Navigation Bar consists of:
- The Navigation Menu
- Favorites
- Action
- Control
- Status
- User Menu
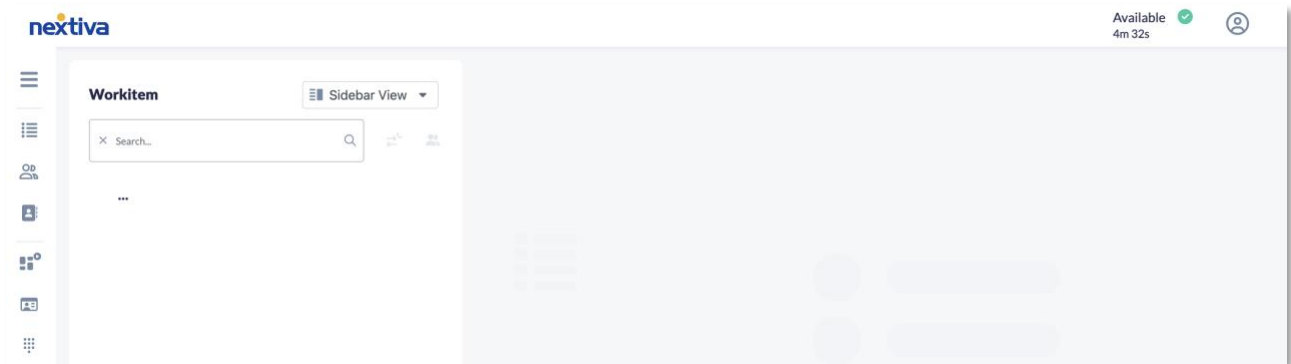
The default Navigation Menu consists of the following options/functions:

Option	Functionality
Options	The first option/function on the left side of the Navigation Bar. When clicked, Options displays the different pages users can see.
Favorites	The functions that users have configured to be their favorites. These are typically the most used options/functions for users.
Company Directory	Allows users to communicate with other users, communicate with queues, share files, and create topics with other agents.
Dialpad	Allows users to make calls. Users can select the dial type and the dial campaign. Users can type the number or use the keyboard.
User Status	The User Status shows your status within the Nextiva system. This is a user's availability for incoming workitems.
User Menu	Allows users shortcuts to send outbound workitems, access user settings, and a link to Knowledge Base articles.

Favorites

The favorites area is where the user places the most common options/functions they use for easy access. Users can customize the Navigation Bar based on their personal preferences. When an option/ function is added to Favorites, it will be displayed in the Navigation Bar.

Customizing Favorites

To add a component to favorites, search for the **Options** icon and drag the icon under the Favorites heading.
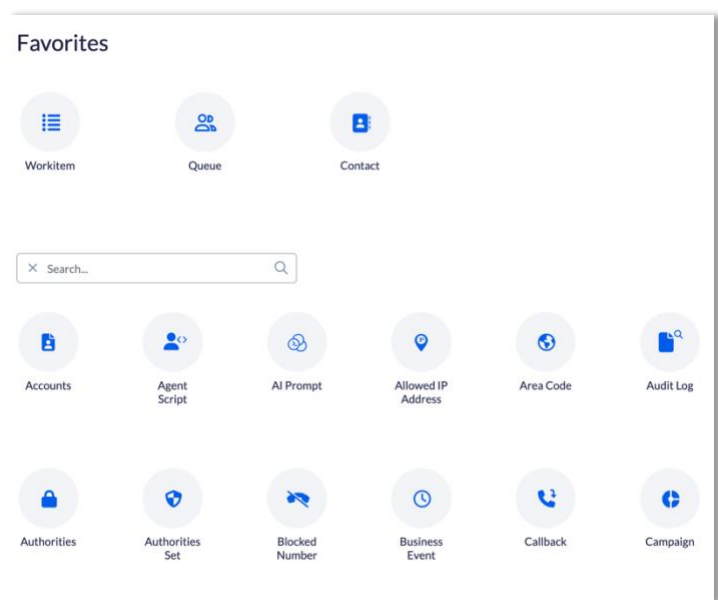
Action

The action area contains additional functionalities and consists of the dashboards, company directory, and dial pad.

Control

The Control area consists of two buttons that are visible when the phone is off-hook and there is access to the disconnect line and mute action. The disconnect line should not be confused with the hang-up from the workitem. When working off-hook, the line is always connected with the server for fastest connection with the caller since users only must accept the incoming workitem instead of picking the phone.

Status

The status displays a user's availability to accept incoming workitems through the ACD. Users must be logged in the ACD and have their status set to Available to interact with workitems, unless they are configured to auto-login to the ACD. By clicking on this option, a pop-up will appear allowing the user to select the queues they need to login to, the media they want to receive, and the user status at login. The pop-up will only show the queues and medias the user is allowed to connect to. Once the user is logged in, they can change their status by clicking back on the option. Then a drop-down of different configured statuses will be available. To logout from the ACD, the user must logout from the application using the option in the avatar menu.

User Menu

Refer to the User Status section for more information about the User Menu.

List and Detail View

The bottom portion of the user interface can either be seen in list or detail view.

List View

The list view has a header and data sections. The header gives the ability to search the workitem and/or take actions on the items of the list (add, edit, delete, and duplicate based on user permissions). The user can search keywords and when available, can use the advanced search window and select additional criteria to search on.

The data section is where the results of the search are presented in a grid format that can be filtered and sorted. When selecting workitems in the list by clicking on the row, the possible actions on that item will be available for the user to select them. When the user selects to add or edit an item from the list, the view will switch to the detail view where he will be able to look at the item in greater detail.

Detail View

The detail view is used to adjust the different fields or parameters of a workitem. It is composed of a header, tabs, and data sections. The header section allows the user to go back to the list of records or to act on the current record. The tabs section allows the user to navigate to a specific panel instead of scrolling to it. There is an add button to create new records of an object. When editing an existing record, the changes are saved automatically, while the user is adding a new record, they will need to confirm the creation of the record by saving it with the Save icon.

Wallboard

The Wallboard is accessible if the user is logged in to the ACD. Users can open or close it by clicking on the open/close arrow on the right side of the wallboard section. The Wallboard gives information about the queue the user is logged in to by media type and queue. If an administrator of the system selected the aggregate option, then the Wallboard will show the information for all queues that users belong to.

The Wallboard shows the following statistics:

Statistic	Description
Abandoned	The amount of workitems that disconnected while still waiting in the queue.
Answered	The amount of workitems answered in the queue.
AQT (Average Queue Time)	The average amount of time workitems are waiting in a queue.
In Queue	The amount of workitems currently waiting in a queue.

Statistic	Description
MQT (Maximum Queue Time)	The maximum amount of time workitems are waiting in a queue.
SLA (Service Level Agreement)	What wait time is acceptable for the queue and how many workitems are abandoned after the acceptable wait time.
Total Transfers	How many calls have been transferred into the queue.

User Status

User Status is very important to Nextiva, it allows you to accept incoming workitems, and tell other users if you are occupied with another task. User Status also allows you to connect to the ACD by choosing the channels, queues, and status.

Changing User Status

To change the current user status, click on the current user status in the Nextiva system. A list of other statuses will appear.

User Status will also automatically update when accepting and finishing with a workitem.
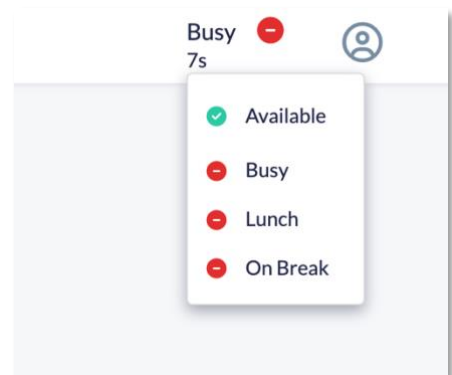
Logging in to the ACD

After you have logged in to Nextiva Contact Center, you can log in to the ACD if you are a member of an ACD queue and are available to process workitems.

> NOTE: You do not have to log in to the ACD to make direct outgoing calls from the dial pad or receive incoming direct calls.

To log in to the ACD, click on **Login** on the right side of the navigation bar. The Login status will change.

Login to ACD Channels

After logging in to the ACD, users can select what media channels they want to receive workitems from.

To add a channel, click the check box next to the name of the channel. Verify all the changes you want to make on each tab, and then click the OK button at the bottom.
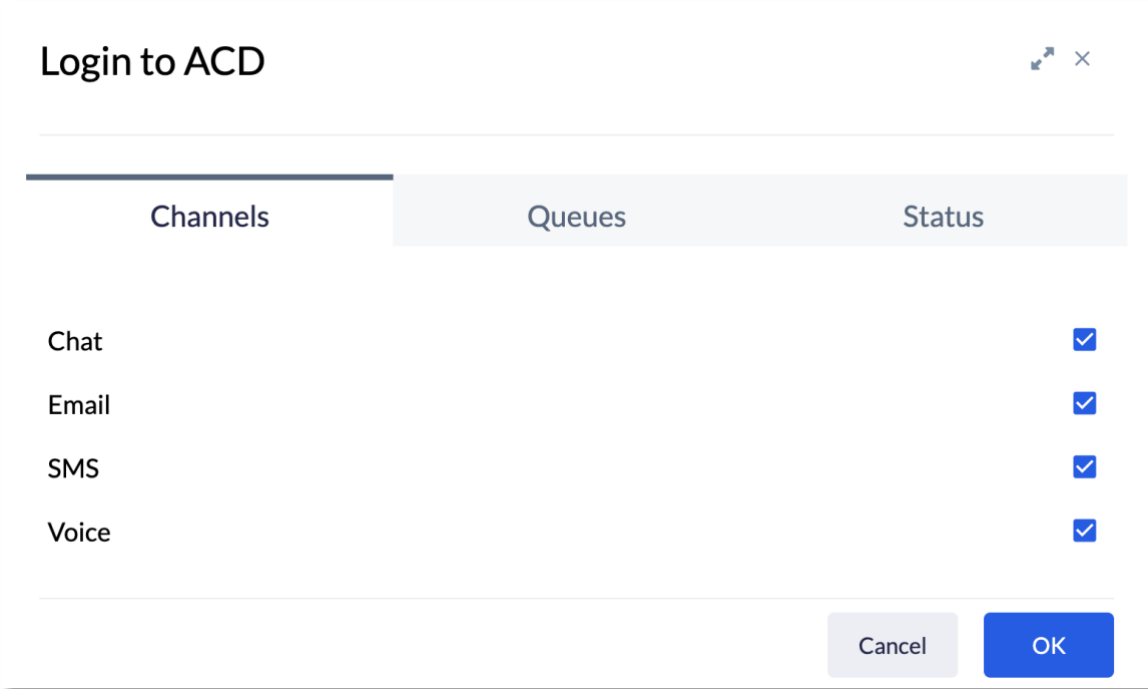
Login to ACD: Queues

The Queues selector is the second choice in the pop-up window. The check boxes to the right of each selection allows you to indicate which queues you will be servicing while logged in.

Login to ACD: Status

The Status selector is the third choice in the pop-up window. The radio buttons to the right of each selection allow you to choose your availability. You can also change status after logging in with the status icon in the upper, right-hand corner of the screen.

The default system statuses are:

Status	Description
Available	You will receive workitems from the ACD queues you're logged into.
Busy	You will not receive workitems from the ACD queues you're logged into.

User Settings

User Settings allows agents to configure defaults for workitems, enable notifications, as

well as other settings. This chapter will cover certain settings that users can configure for their accounts.

User Settings can be divided into the following sections:

- General
- Telephony
- ACD
- Notification
- Disposition
- Email Signature
- Dial Pad
- Directory
- Sound
- Supervisor

Accessing User Settings

To access User Settings, click on the dropdown arrow under the **User** icon and select **User Settings**.
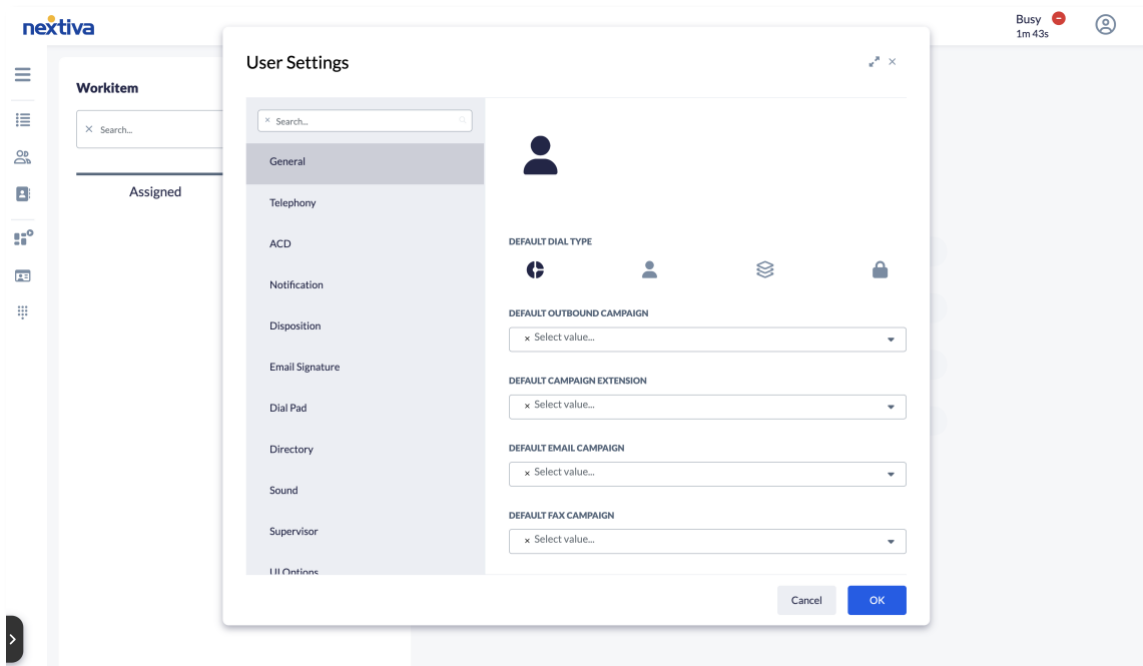
User Settings – General

The General tab allows users to select several defaults for outbound workitems. Users can configure:

- Default Dial Type (To read more about dial types, see Dial Pad Dial Types.)
- Default Outbound Campaign

- Default Email Campaign

- Default Fax Campaign

- Default SMS Campaign

- Time Zone

- Language Identifier

- Chat Welcome Message

- Voicemail Greeting

To change their default settings, Users can use the drop-down icon and scroll through the options available to them or type the specific option they want.

User Settings - Telephony

The Telephony tab shows the phone type and number for a user. There are different fields to fill out depending on the phone type selected. If there is a direct number, it was assigned to a user. Users can also enable the Work Offhook option.

To verify if the phone connection works, users can click the Call Me! button at the bottom of the pop-up window.

User Settings - ACD

The ACD tab allows users to automatically accept workitems, and automatically log in to the ACD. Users can set an ACD login status, as well as what queues to receive workitems from, and what communication channel they would like to use.

To enable the toggle options, the toggles must be switched to the right.

User Settings - Notification

The Notification tab allows users to enable web notifications from Chrome when not working directly in the Nextiva system.

The Notification tab is made up of 3 separate sections: Voice Workitems, Digital Workitems and Digital Messages. You can set a sound notification, enable web notifications for each section. There is also an option to Always Show notifications.

For Windows, the notification appears in the bottom right corner of the screen, for Mac, the top right corner. Clicking on the notification will direct users to Nextiva.

To enable, the toggle must be switched to the right.

User Settings - Duration Notification

The Duration Notification Tab allows you to enable a notification for different types of calls when you have been active on that call for a certain amount of time.

User Settings - Hold Notification

The User Settings Hold Notification Tab allows you to enable a notification for different types of calls when you have put that call on hold for a certain amount of time.

User Settings - Disposition

The Disposition tab allows users to enable notifications if a disposition for a workitem wasn't selected. Delay Notification is the amount of time after a workitem until the notification appears.

User Settings - Email Signature

The Email Signature tab allows you to add a signature that will automatically be added to email workitems. The Email Signature section will have an editor that can help you with the formatting of the signature.

For the Email Signature in the User Settings, the layout will be divided into 3 parts:

- More Text (Text Options) - For text formatting.
- More Paragraph (Paragraph Options) - For paragraph formatting.
- More Rich (Insert Options) - To insert links and images.

User Settings - Dial Pad

The Dial Pad tab allows you to leave the dial pad on the screen after dialing or leaving it there.

You now can choose between the full dial pad view and the quick dial pad. The full dial pad is what agents are used to seeing accessible from the dial pad icon in the header bar.

To select the full view or minimized view the user goes into his setting in the Dial Pad tab and chooses between the Full View or Minimized in the **Dialpad Type** drop-down.

> **NOTE**: If minimized is selected the dial pad icon will be removed but still accessible from the minimized dialpad.

The inline dialpad will be placed in the middle of the screen, but it can be dragged to another location using the white bar located on the top of the window.

The inline dialpad will have a drop-down of previously dialed phone numbers that will appear when the agent starts typing. You can change the dialed campaign by using the campaign button. By default, it will have the outbound campaign set in the user settings, but you can change it. The change will be reset the next time you log in to Nextiva. You can also choose the dial type by right clicking the dial icon where the

different dial types will be presented. By default, the dial type will be the same one configured in the user settings. A changed dial type is not saved per session and must be changed each time.

A changed dial type is not saved per session and must be changed each time.

NOTE: The number needs to be filled out to be able to right-click the dial pad icon and see the options.

Clicking on the icon before the dial icon brings the dial pad to pop-up window size.

User Settings - Directory

The Directory Tab is made up of three separate sections: Pop-up behavior, High Priority Messages and Agent Messages. Pop-up behavior allows you to control if and when the dial pad dis- appears from the user interface after dialing.

In the Messages section you can select sounds for sound notifications. For Agent Messages and Topic Messages you can choose to enable notifications. For Queue Messages, you can choose which queues you want message notifications for.

User Settings - Supervisor

The Supervisor tab lets you choose what users, queues, campaigns, and users in queue you want to supervise.

Note: Scroll to see all of the options to fill out

User Settings - Sound

The Sound tab allows users to configure where sounds for various notifications from the Nextiva system will come from on their device

Phone Workitems

There are two types of inbound calls that users can accept:

- ACD (Automatic Call Distributor) Calls- Calls distributed to users from a queue.
- Direct Inbound Calls- Calls made directly to a user's phone line.

Accepting Inbound Calls

Incoming Phone workitems will appear on the bottom right corner of the user interface.

Incoming inbound phone calls will have the following phone icon.

NOTE: Not answering an incoming call will set the user status to No Answer.

Outbound Calls

To make outbound calls, use the dial pad which is in the horizontal navigation bar.

At the top of the pop-up window, you need to select the outbound campaign you want to "log" your call to. Enter the number or copy and paste a number. You can also choose from a list of recently dialed numbers.

NOTE: The syntax for dialing a number is: + [country code] [area code] [number]. Example: +18005551212.

Dial Pad Dial Types

When placing an outbound call, there are four dial types you can choose from.

Dial Type	Description
Campaign DID	A number associated with a campaign that will be displayed as the caller id for outbound calls. **NOTE**: If you try to dial out on a campaign with no valid phone number for caller id the call will fail to go out.
User DID	A number associated with a user for caller id under User Settings: Telephony. **NOTE**: The number must be verified and belong to a campaign to work
State DID	A list of numbers that can be entered under Campaigns. These numbers try to make calls look local to the recipient of the call.
Private	A number that will be displayed as private on the caller id.

ACD Voicemail

ACD Voicemail is a feature that can be used when a customer calls into a queue and if

no agent is available to answer the call or if it is after hours, the customer can leave a message that will be placed in the queue for the next available agent logged into that queue. The agent can then listen to the message and can call them back.

When a customer leaves a voicemail, it will be offered to you the same way as a telephone call.

To listen to the message, press the **Play** button. To call the customer back click the hyperlink in the left corner near the phone icon.

> **NOTE**: If it's not necessary to call the customer back, the voicemail must be dispositioned.

ACD Callback

ACD Callback is a feature for when a customer calls into a queue and chooses to leave a phone number instead of waiting in the queue. The customer can be called back with the phone number that they left by the next available agent logged into the queue.

Transferring Calls

There are several types of transfers, and they are accessible from the list of workitems or the detailed view. Cold Transfers allow users to transfer a call to another user without giving any warning or detail about the call. Supervised Transfers allows users to transfer a call with a warning or detail about the call. The default action by clicking on the transfer icon (black box) will be the transfer to an agent. By clicking on the right mouse button on this same icon, a drop-down menu giving more choices will appear.

Transfer to an Agent

The transfer to an agent, whether using the transfer icon, the drop-down menu from the list of workitems, or the detailed view, will present the company's telephone directory with the users' view. Once the directory is displayed, the user will have to choose the agent to whom he wishes to transfer the workitem, by selecting it and clicking on the transfer icon. The workitem will disappear from the interface and the transfer will be completed.

Transfer to a Queue

The transfer to a queue is accessible from the drop-down menu and works the same way as the transfer to an agent. The company directory will be presented with a view of the queues. Once the directory is displayed, the user will have to choose the queue to which he wishes to transfer the workitem, by selecting it and clicking on the transfer icon. The workitem will disappear from the interface and the transfer will be complete. The workitem will then be routed to the first available agent in the queue.

Transfer to an External Number

The transfer to an external telephone number is accessible from the drop-down menu. A window will be presented, in which the user will enter the external telephone number where the call will be transferred, and then click on the OK button to confirm everything. The workitem will disappear from the interface and the transfer will be completed.

Supervised Transfer

The supervised transfer is accessible via the drop-down menu and is only accessible via the list of workitems because it involves transferring several workitems at the same time. To do this, the user must have at least two workitems in his list and can select them using the Command key (or Cmd) on Mac and the Ctrl key on Windows. Once the two workitems have been selected, the user will have to use the transfer icon to complete the operation. Once clicked, all the workitems that were selected will disappear from the list indicating the end of the operation.

Conference Calls

Make conference calls easily by using the conference icon in the workitem list or in the detailed view. You can enter or leave the conference call as needed and can remove the workitem from the conference by using the active icon or by ending the call.

Wrap-up Dispositions

Wrap-up is generally the time it takes for you to "wrap-up" the business of the interaction with the customer. Wrap-up happens after you terminate a workitem, but before you take the next workitem. During this time, you make yourself unavailable, so you are not interrupted during wrap-up duties. This may include editing notes on the workitem, updating the contact record, doing fulfillment, or debriefing another agent or supervisor in topics or the company directory. The final act of wrapping up is usually setting a disposition. If enabled, these dispositions are defined by the system administrator and reflect the status that is particular to your business so as you can imagine these vary widely from business to business.

It is very important for you to set the disposition of a workitem as soon as you can during wrap- up. This is an important metric for supervisors to understand the efficacy of the agent team and the performance of the contact center. In fact, you cannot receive subsequent work- items from the queue until you choose a disposition, that's how important it is.

Dispositioning Workitems

If you have Disposition Notification enabled a red warning message will pop-up if you're

on the UI. If you happen to be on a different tab or the browser is minimized and the web notifications enabled, you will receive a web notification. For Windows, the notification appears in the bottom right corner of the screen, for Mac, the top right corner. Clicking on the notification will direct users to the Nextiva system.
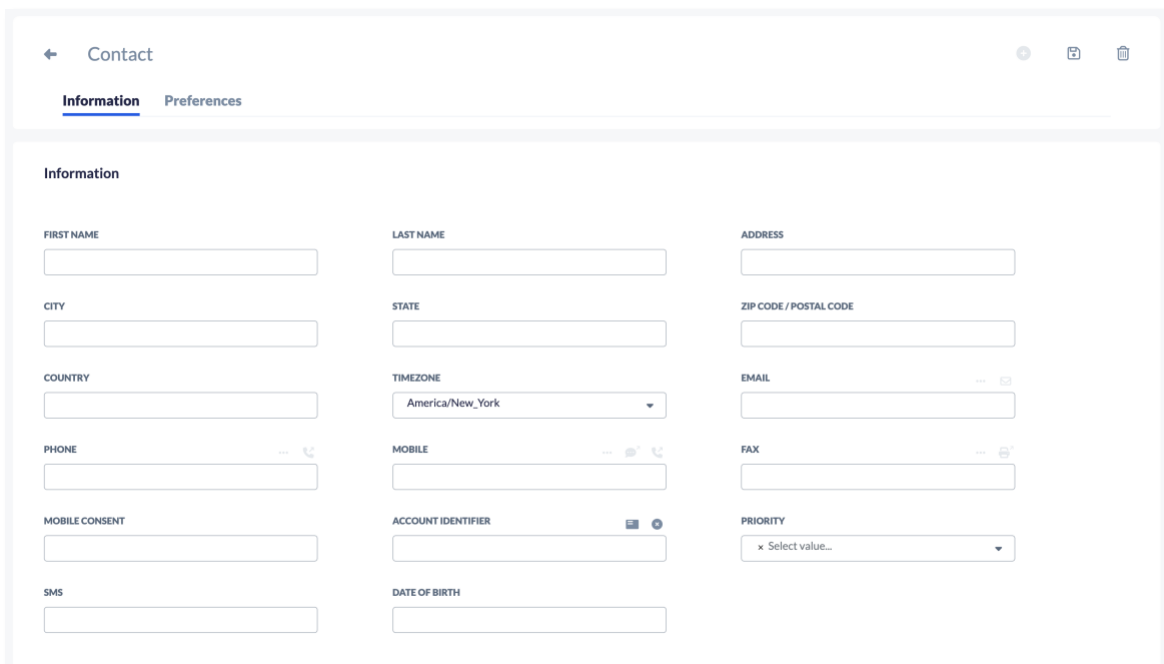
In addition to doing clean-up dispositioning on found workitems, you can quickly disposition work- items while you are active with them that is the one you were just working on. Once you've clicked on the "Choose a Disposition" drop-down icon, you will see a list of dispositions that have been set by the system administrator. Highlight the most appropriate one and click on it to set the dis- position. This is important because you will not be able to work on new workitems until this is done. Once you've chosen the disposition, the active workitem screen will disappear. You can always review the results of the workitem by searching on it later.

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.

Creating a Contact Record

When you accept an interaction/workitem from a contact, you can create a contact record so that all the information that was recorded about that customer displays in

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your workspace. This information provides some familiarity with the contact and the contact's previous activities or issues.

To easily track the relationship between a contact and the business/company they work with, an Account (Account Identifier) can be assigned to a Contact.

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.

Workitem with No Contact Found

If a workitem is initiated for a new or unassigned contact, you will see a note telling you that you need to assign a contact. You can do this by either creating a new contact while handling the workitem, or by selecting an existing contact and assigning the workitem to it.

Contact Icon and Contact Search

In the upper, left-hand section of the Vertical Navigation Bar, you will see a tab called Contact" The search is not context-sensitive, so capitalization does not matter.

Workitem History

To access the Workitem History, click on the **History** Icon. To search by a specific phone number or Workitem ID for the current day, enter the information in the top search bar and click **Search**.

Clicking the **Filter** icon will lead to a drop-down menu allowing you to narrow your search by the following criteria:

- Specific User
- Workitem Type (including surveys)
- Campaign
- Queue
- Disposition
- Duration
- Date Range
- Any combination of these options

Workitem History User Interface

The User Interface will have the following tabs displayed:

Heading	Description
Identifier	Unique identifier assigned to each work- item.
callId	Unique ID assigned to each call.
Avatar	The avatar associated with the destination address.
Type	The type of workitem.
From	The origination address of the workitem.
To	The destination address of the workitem.
Campaign	The name of the campaign associated to the workitem.
Queue(s)	The name of the queue that the workitem was handled by.
Created At	The date and time that the workitem had been created.
Terminated At	The date and time that the workitem had been terminated.

Workitem History Detail View

Clicking on an individual workitem in History will bring up details on that specific workitem. Different information will be displayed depending on the type of workitem.

- For Chat, SMS, Social, or Email workitems, the entire conversation will be displayed.

- The Data section displays any information captured in the workflow. There can be a lot of information displayed or none, it depends on the setup.

- The Events section displays each event that happened during the workflow.

Sections	Descriptions
Date	The date and time that the event started.
Duration	The amount of time the event took.

User	The name of the user that handled the event.
Queue	The name of the queue that the event came from.
Result	The description of the result of the event.

Editing History

Certain fields in a workitems history can be edited. Click the **Edit** button, and a pop-up window will appear. When done, click **OK**.

Chat Workitems

You may have the option to chat with customers to better communicate with them. Chat provides customers with a choice of channel preference. Chats can also allow you to communicate with multiple customers at the same time.

Incoming Chats

For chats Nextiva may use AI (Artificial Intelligence), so customers may first encounter a Chat Bot. Often, the Chat bot will support an intelligent dialog with the customer and answer all the questions they need, and the chat never becomes "live" for you to intervene. Another scenario occurs when the Chat Bot does all it can do to satisfy the customer, but the customer nonetheless needs live intervention from an agent or supervisor. In this case, when the chat is routed to you, the previous dialog with the Chat Bot will be available for you to see when you accept the chat.

When you are available and an incoming chat is presented to you, the Chat Notification will appear in the lower, right-hand corner of your screen. The pop-up window consists of the following elements:

- The Message Icon.
- The Message itself.
- A text box for the reply to be typed in.

A timer representing the number of seconds the user has before the notification disappears. If the agent clicks in the reply box, the timer will stop, and the agent will need to dispose of the notification by closing it or sending a reply. The duration of the timer is 10 seconds.

If the user wishes to respond directly, they can click in the input field. The input will then resize, and the border will change color indicating he is in edit mode. When

finished, the user will click the send button to send the message.

Accepting a Chat Offer

After accepting a chat, the active workitem control tabs will default to "chat" and show any previous dialog between the Chat Bot and the customer. If there was no Chat Bot involvement, you will see any preamble messages automatically sent to the customer and any chat form data the customer may have filled in. You may now continue the chat dialog "live."

The chat dialog screen will appear directly in the middle of your workspace. You will see a time stamp next to each bit of dialog both from the customer and your responses. This helps you to keep track of response time so you can be diligent in engaging the customer in a timely fashion.

When a customer is typing and preparing to send you the next piece of dialog, you will see a progress indicator letting you know they are typing. This helps to avoid sending unnecessary answers or interrupting the customer whilst they are in thought and typing.

Survey

After accepting a chat workitem, you may see a user survey. User surveys are custom-built by your Administrator. For questions on filling out the user survey please speak to your supervisor or administrator.

Contacts Tab

After accepting a workitem, you can click on the "Contact" tab to show the "Mini CRM" screen. Here you can add or edit information about the customer. The contact screen provides you with the ability to get a quick look at essential customer information. This includes fields for name, address, time zone, coordinates, date of birth, and customer ID numbers or case numbers.

Depending on how your system is configured, you may be able to view the same contact information in a native, third-party CRM system that Nextiva is integrated with. The use of tabs here is to provide a short cut to that section. You can also scroll down to the section you have selected.

Notes Tab

After accepting a workitem, you can click on the "Notes" tab to reveal to see existing notes on the customer taken by other agents and you can also create a new note. Depending on your authority or class of service, you may not be able to create new notes. This note-taking capability is set by your system administrator.

Personality Insights Tab

The Personality Insights tab reveals tips on how to best interact with the customer. Insights will only appear if there has been enough historical dialog with the customer to determine personality.

Data Tab

The Data tab stores essential "snapshot" information on the customer, including name and file number (if connected to the back-end system).

Information Tab

The Information tab provides details on the workitem, including priority, queue information, and start and stop times.

History Tab

The history tab reveals a chronological timeline of interactions with the customer. On the right-hand side of the screen, you will see arrows. Clicking on an arrow corresponding to a stored work item will show more details about that item.

Selection of Timeline Events

By clicking the "down arrow" icon associated with a particular timeline item, the item detail will expand to include more information.

Events Tab

The Events tab provides information on workitems associated with the active contact, such as queue name, routing result, duration, and priority.

Chat View

You will see a chat window divided into a large upper window and a small lower window.

The upper window lets you view the entire conversation, and the bottom window enables you to send messages.

Below the lower window, you can choose to open the editor. The editor allows you to type your response in a larger window. Once you have reviewed your response, click the OK button to send the text in the editor to the lower window. You can then send the message from the lower window. Clicking on the happy face icon will open a pop-up window that allows you to send emojis.

Depending on administration configuration, you may or may not have access to Response Templates. Response Templates can be used for frequently asked questions. Instead of typing a response or looking for where the response is located, you can find the answers associated with this in the chat response library.

Transferring a Chat

Users can transfer the chat directly to another user or a different queue by selecting the transfer icon on the work item. Selecting the transfer icon opens the company directory, where the agent can choose where to transfer the work item.

Terminating a Chat

To terminate a chat, click the **X** and select a disposition if enabled.

Email Workitems

With the Nextiva system, customers have a choice of channel preferences. The Nextiva system also handles incoming emails queued and routed by the built-in ACD. The incoming email can receive special treatment from the system, including automated email acknowledgment, agent scripts, and suggested email templates. As a user, you will be presented with the scripts and the email response templates once you accept the ACD email offer.

Incoming Email from the ACD Queue

When you are available, and an incoming email offer is presented, the Workitem Offer Pop-Up will appear in the lower right-hand corner of your screen.

Incoming Email Pop-up Window

The pop-up window has components similar to those of other work items. However, there are some differences:

- Channel Type Icon: Email
- Email Address, Timestamp, Campaign, and Queue Indicator: The email address, timestamp, campaign, and queue indicator are in the upper middle part of the Workitem Control Pop-up. This gives you text-based information on who the customer is when the workitem came in, and to which campaign and queue the email came in.
- Countdown Timer: Located in the upper right-hand part of the Pop-Up.

Incoming Email Workitem

Upon accepting an email from the workitems tab, the email will open and show you the To address where your email reply will be sent and the CC address if one exists. You will also see the subject of the email and a From address. The From address is the address that you are sending from. It is recommended that you change any of these fields if you would like to CC or BCC someone on this email.

Survey

After accepting an email workitem, you may see a user survey. Your administrator custom-builds user surveys. If you have questions about filling out the user survey, please speak to your supervisor or administrator.

Contact Tab

After accepting an email workitem, click the Contact tab to reveal the Mini CRM screen. Here, you can add or edit information about the customer. The contact screen allows you to quickly review essential customer information, including fields for name, address, email address, time zone, coordinates, date of birth, and customer ID numbers or case numbers.

Depending on how your system is configured, you may be able to view the same contact information in a native, third-party CRM system with which Nextiva is integrated.

The use of tabs here provides you with a shortcut to that section. You can also scroll down to the section you have selected.

Notes Tab

After accepting a workitem, you can click on the Notes tab to reveal existing notes on the customer taken by other agents and create a new note.

Depending on your authority or class of service, you may need help to create new notes. Your system administrator sets this note-taking capability.

Personality Insights Tab

The Personality Insights tab reveals tips on how to best interact with the customer. Insights will only appear if there has been enough historical dialog with the customer to ascertain personality.

Data Tab

The Data tab stores essential customer snapshot information, including name and file number (if connected to the back-end system).

Information Tab

The Information tab provides details on the workitem, including priority, queue information, and start and stop times.

History Tab

The history tab reveals a chronological timeline of customer interactions. After performing a search, you will see arrows on the right side of the screen. Clicking on an arrow corresponding to a stored workitem will reveal more detail.

The history detail in an active workitem screen will appear on the right-hand side of the workspace. After a search, it provides a chronological history of interactions with the active contact.

You can click the drop-down icon at the top of the history section to choose how far back in history you want to see. Your choice will then display only items in that time frame selected.

Selection of Timeline Items

By clicking the "down arrow" icon associated with a particular timeline item, the item detail will expand to include additional information.

Events Tab

The Events tab provides information on workitems associated with the active work item, such as routing results and duration.

Transferring an Email

If other agents are available, you can transfer an email. You can transfer an email from the list or detail view. Click on the **Transfer** icon in the upper right-hand corner of the workitem workspace to initiate a transfer.

Once you initiate a transfer request, the company directory will pop up. Simply select an available agent or queue and then click the **Transfer** icon just below and to the right of the user or queue's name.

Outbound Emails

Sending an Outbound Email from the User Menu

Access the User Menu and click Outbound Email to send an outbound email. Enter the email address and press **Enter**. Select the email campaign you wish to use from the Email Campaign drop-down list and click **OK**.

Sending an Outbound Email from a Contact

You can also send an email from a contact by selecting the **Envelope** icon next to the contact's email address. When initiating an outbound email from a contact, the Nextiva system will use the default email campaign you selected under user settings. Enter your message and click **Send**. This will terminate the workitem.

Email Signature

You can now add a signature that will automatically be added to email workitems. The Email Signature section will have an editor to help you format the signature.

There will be a toolbar across the top of the editor that allows you to modify the:

- Headings
- Font
- Font size
- Text formatting (bold, italics, underlining, and text color)
- Emojis (New emojis have been added to Nextiva that can be used anywhere messages are sent in Nextiva, including different skin colors, and you can search for emojis by emotion.)
- Lists
- Paragraph formatting
- Inserting links
- Inserting files
- Inserting images
- Inserting tables
- Cleaning
- Undo/Redo
- Expand the editor to full-screen

> **NOTE**: If you try to insert an inline image over 2MB, it will be added to the attachments instead of in the email. Files over 20MB will be rejected. If the total size of the files exceeds 20MB, you will receive an error message, and the file will not be attached to the email.

SMS Workitems

When you are available in the ACD, and an incoming SMS is presented to you, the SMS Notification will appear in the lower right-hand corner of your screen.

Accepting SMS Workitem Offers

Upon accepting an SMS, the active workitem control tabs will default to "SMS" if you receive it from the Workitem view. You may now continue the SMS dialog "live."

The SMS dialog screen will appear directly in the middle of your workspace. You will see a time stamp from the customer and your responses next to each dialog. This helps you keep track of response time so you can engage the customer in a timely fashion.

Active SMS Workitems

When you have an active SMS, you can respond by typing in the input box below the main chat window and selecting the send icon on the bottom right-hand side.

To the left of the send button is an Emoji Icon. If you click the emoji icon, a window will open. Select the emoji you want to send, which will be added to the input box. Then click the send icon to send the SMS.

The icon to the left of the Emoji Icon is the Response Templates Icon. If your administrator has assigned SMS templates, you will see a red badge and a white number indicating the number of email response templates.

If you select the response templates icon, a window will open with the names of the response templates listed on the left-hand side. On the right-hand side is the text that can be added to the SMS. To add the text, click the OK button at the bottom of the window. To cancel without adding any text, click the Cancel button at the bottom of the window. To send the text of the response template, click the send icon.

Survey Tab

After accepting an SMS workitem, you may see a user survey. Your administrator custom-builds user surveys. If you have questions about filling out the user survey, please speak to your supervisor or administrator.

Contacts Tab

After accepting an SMS workitem, click the Contact tab to show the Mini CRM screen. Here, you can add or edit information about the customer. The contact screen allows

you to quickly review essential customer information, including fields for name, address, email address, time zone, coordinates, date of birth, and customer ID numbers or case numbers.

Depending on how your system is configured, you may be able to view the same contact information in a native, third-party CRM system with which Nextiva is integrated. Tabs provide a shortcut to each section. You can also scroll down to the section you have selected.

Notes Tab

After accepting a workitem, you can click on the Notes tab to view existing notes on the customer taken by other agents and create a new note.

Depending on your authority or class of service, you may need help to create new notes. Your system administrator sets this note-taking capability.

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The history detail in an active workitem screen will appear on the right-hand side of the workspace. After a search, it provides a chronological history of interactions with the active contact.

You can click the drop-down icon at the top of the history section to choose how far back in history you want to see. Your choice will then display only items in that chosen timeframe.

Selection of Timeline Items

By clicking the **Down arrow** icon associated with a particular timeline item, the item detail will expand to include more information.

Events Tab

The Events tab provides information on workitems associated with the active work item, such as routing results and duration.

Outbound SMS

Access the User Menu and click Outbound SMS to send an outbound SMS. Enter the phone number in the To Field. Enter the text in the SMS field and select the SMS campaign you wish to use from the SMS Campaign drop-down list. Click **OK**.

Response Templates can be used when initiating an Outbound SMS workitem. A new Template button has been added, showing the campaign templates. If a campaign is selected, the search will return its templates. If no campaign is chosen, all SMS templates will be displayed.

Sending an Outbound SMS from a Contact

You can also send an SMS from a contact within the Nextiva system.

Navigate to the contact and select the **SMS** icon next to the contact's mobile phone number. When initiating an outbound SMS from a contact, the system will use the default SMS campaign you selected under user settings.

To see the outbound SMS, you must navigate to the workitem view.

Once you have written the SMS, select the send button to send the email to the phone number. This will terminate the workitem.

> **NOTE**: The SMS will remain an active workitem on your screen until you terminate it. Unlike a Chat, which can terminate when the customer disconnects, an SMS does not terminate independently. It is your responsibility to terminate the SMS conversation. If the customer responds later, a new SMS conversation will be routed to the next available agent via the ACD.

Predictive SMS

Your organization can choose to have the system send automated SMS Messages to reach your leads based on their channel preference. This can result in more customer contacts

than can be reached in a day.

> **NOTE**: Users do not need to be logged into the system to send Predictive SMS messages. However, they must be logged in if you want an agent to answer the customer's SMS responses.

You will need to set up an inbound SMS campaign for SMS replies to be routed to an agent.

This is what an outbound SMS with a reply looks like.