

NEXTIVA CONTACT CENTER
CALL CENTER

AGENT WORK DAY QUICK START GUIDE

SERVICE DELIVERY CUSTOMER TRAINING
VERSION 1.0



nextiva

Welcome To The Nextiva NCC Agent Work Day Quick Start Guide!

Introduction

We're thrilled to have you join the Nextiva community! We understand that effective customer communication is vital for any business, and we've built Nextiva NCC Agent Work Day Quick Start Guide to empower you to connect with your customers seamlessly, no matter where they are.

Table of Contents

[Self-Guided Setup](#)

[Logging In](#)

[Audio](#)

[Going Available](#)

[Inbound Voice calls](#)

[Completing the call](#)

[Going Unavailable](#)

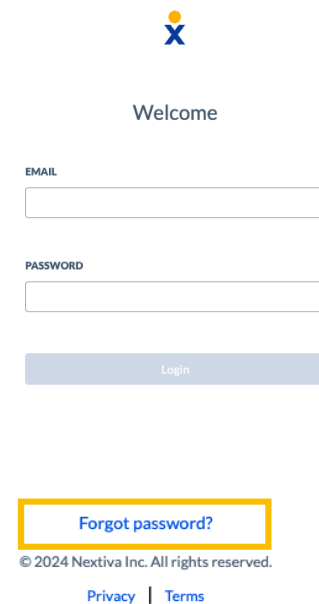
[Signing out](#)

XBert Tip: Check out our full [Nextiva Contact Center Call Center Agent Guide](#) or [Nextiva Contact Center \(NCC\) Agent Webinar](#) for more information on being an Agent in NCC!

Self-Guided Setup

Logging In

1. Visit nextiva.thrio.io to access NCC.
***XBert Tip:** Using Google Chrome web browser will ensure the best possible experience and avoid any potential issues or errors.*
2. Enter email address and password. Select **Login**.
3. If it is your **first time logging in** or to **reset your password**, select **Forgot Password?**
 - a. Find the Reset Password email sent from no-reply@nextiva.com
 - b. Select the **Reset Your Password link**.



The image shows the Nextiva login interface. At the top right is the Nextiva logo (a blue 'X' with an orange dot). Below it is the word 'Welcome'. There are two input fields: 'EMAIL' and 'PASSWORD'. Below these is a 'Login' button. At the bottom, there is a link 'Forgot password?' highlighted with an orange box. Below that is the copyright notice '© 2024 Nextiva Inc. All rights reserved.' and links for 'Privacy' and 'Terms'.

Hi

You recently requested to reset your password for your Nextiva account. Use the button below to reset it.

[Reset your password](#)

The link is only valid for the next 24 hours.

If you did not request a password reset, please ignore this email. [Please Contact Support](#) if you have questions.

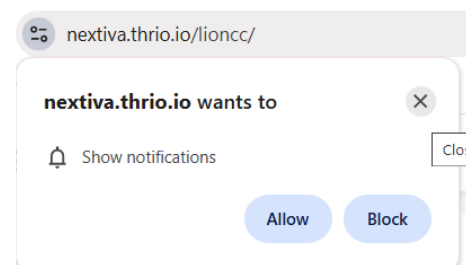
Thanks,

The Nextiva Team

- i. **Follow the prompts** to reset the password within **24 hours** of receiving the email. If **24 hours passes**, select **“Forgot Password”** again.

Audio

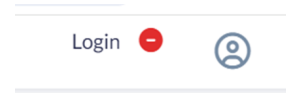
Upon logging in, you must allow **Chrome** to have **access to the microphone**. This is what will allow you to communicate with your headset or computer speakers. Chrome audio access will be based on your **computer’s settings**.



Going Available

When you're going live to take calls, you'll want to make sure you're ready to pick them up. Just follow the steps below to help you get set up so you can take those calls.

1. Select the **Login** icon with a red dot in the top left corner.

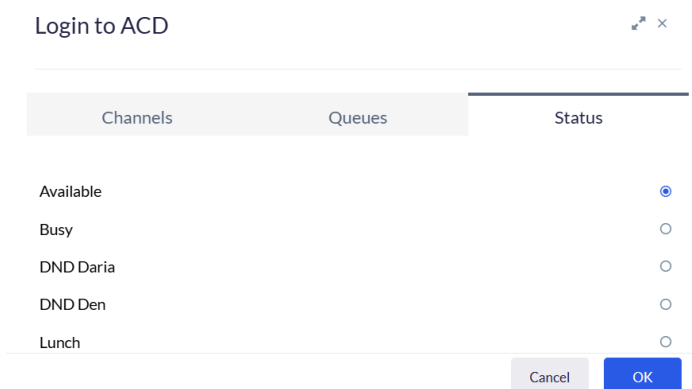


2. A **new window** will display in the middle of the screen, select the **Status** tab.

A window titled 'Login to ACD' with a close button. It has three tabs: 'Channels', 'Queues', and 'Status'. The 'Status' tab is selected. It contains a list of status options: 'Available', 'Busy', 'DND Daria', 'DND Den', and 'Lunch'. Each option has a radio button to its right. The 'Busy' radio button is selected. At the bottom right are 'Cancel' and 'OK' buttons.

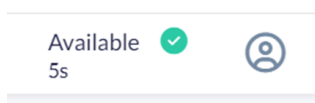
| Channels | Queues | Status |
|----------|--------|---------------------------------------|
| | | Available <input type="radio"/> |
| | | Busy <input checked="" type="radio"/> |
| | | DND Daria <input type="radio"/> |
| | | DND Den <input type="radio"/> |
| | | Lunch <input type="radio"/> |

3. Within Status, make sure **Available** is selected and **click** Okay.

A window titled 'Login to ACD' with a close button. It has three tabs: 'Channels', 'Queues', and 'Status'. The 'Status' tab is selected. It contains a list of status options: 'Available', 'Busy', 'DND Daria', 'DND Den', and 'Lunch'. Each option has a radio button to its right. The 'Available' radio button is selected. At the bottom right are 'Cancel' and 'OK' buttons.

| Channels | Queues | Status |
|----------|--------|--|
| | | Available <input checked="" type="radio"/> |
| | | Busy <input type="radio"/> |
| | | DND Daria <input type="radio"/> |
| | | DND Den <input type="radio"/> |
| | | Lunch <input type="radio"/> |

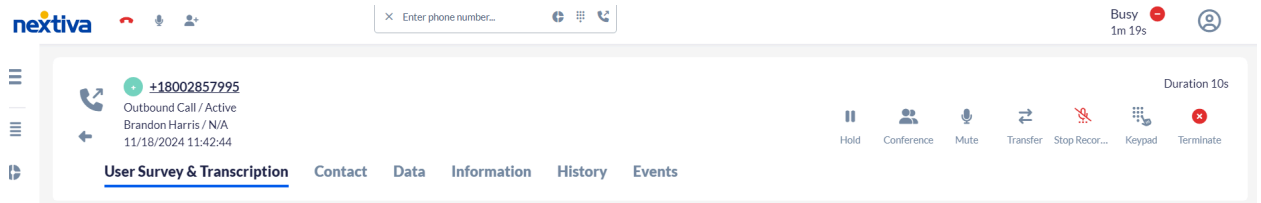
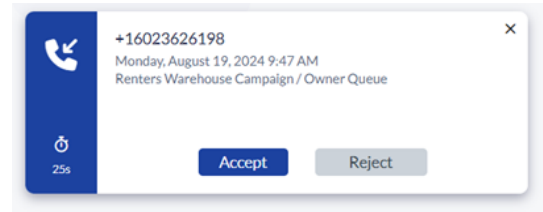
4. You should now see **Available** in the top right corner.



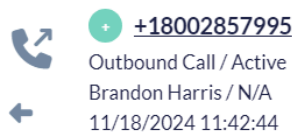
XBert Tip: Learn more about User Status types in the [NCC Call Agent Getting Started Guide!](#)

Inbound Voice calls

1. When receiving an inbound call, you will see the main notification in the bottom right corner. Select **Accept**.
2. Dashboard will update to look like below. This screenshot focuses on the top half with the call controls.



1. This is the inbound caller's information: Name, Number, Company Info or Personal, Date and Time Call started.



2. Quick access to hanging up the call, muting your microphone



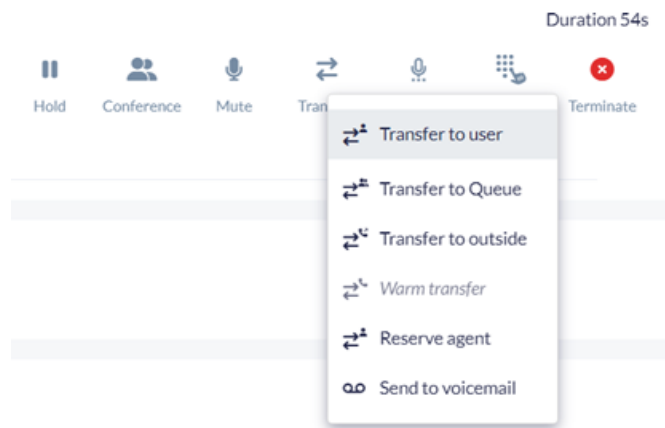
3. Here are the controls for hold, conference, mute, transfer, and call recording.



Transferring Calls

Transferring has several options but two main options:

- a. **Transfer to User** – anyone within the contact center
- b. **Transfer to Outside** – anyone outside the contact center, requires 10-digit dialing



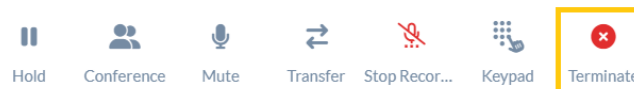
Completing the Call

Once the call has been made, a toolbar will appear at the top of the screen.

1. To end a call, select the **red phone** button.



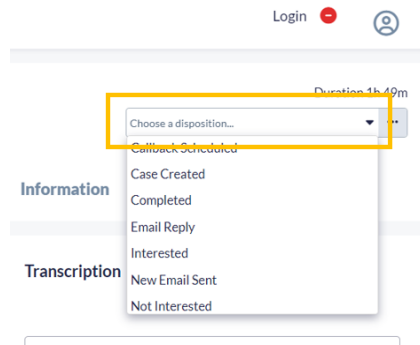
Alternatively, you can choose the terminate icon in the open workitem for the active call.



2. You'll need to **disposition** the call (below).

Disposition

After completing a queued workitem, select the appropriate outcome category from the available options.



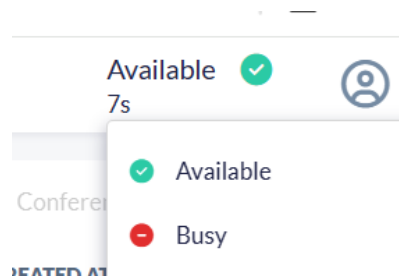
XBert Tip: Do not disposition until you've finished all your after-call work. Dispositioning the call prematurely will cause the contact center to automatically set you to available.

Going Unavailable

Once you've wrapped up your day, make sure to sign out. You definitely don't want customers waiting in line with no agents around to help them, so this step is really important when you're done.

XBert Tip: Unavailable will be used for breaks, meetings, outbound dialing, and lunch.

1. Select the **Available** icon top right.
2. Select **Busy**.



Signing out

Select the avatar in the top right, select **Logout of ACD**.

