NEXTIVA CONTACT CENTER

CALL CENTER

AGENT

GETTING STARTED GUIDE

SERVICE DELIVERY CUSTOMER TRAINING

VERSION 2.01

Welcome to **Nextiva Contact Center (NCC) Call Center**, the all-in-one platform for managing customer interactions across multiple channels. This detailed guide will walk the agent through the features and functionalities of NCC, empowering them to provide exceptional customer service.

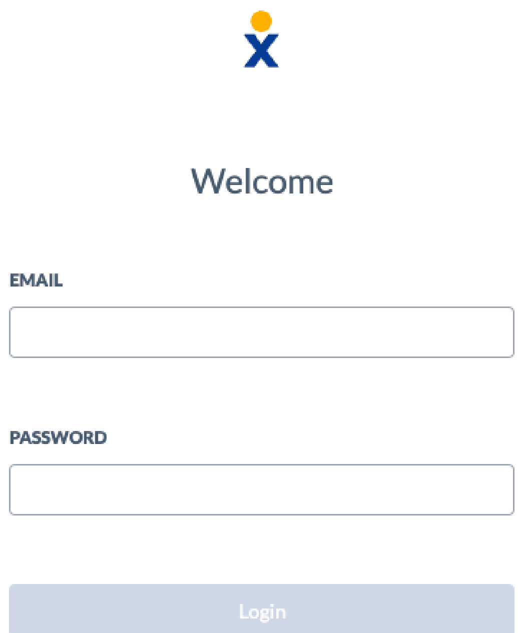
Note: Full Contact Center settings are exposed; however, not all apply to the Voice Only Contact Center product type.

Logging In

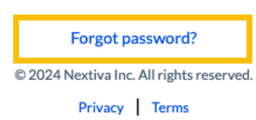
1. Visit nextiva.thrio.io to access NCC.

   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**.

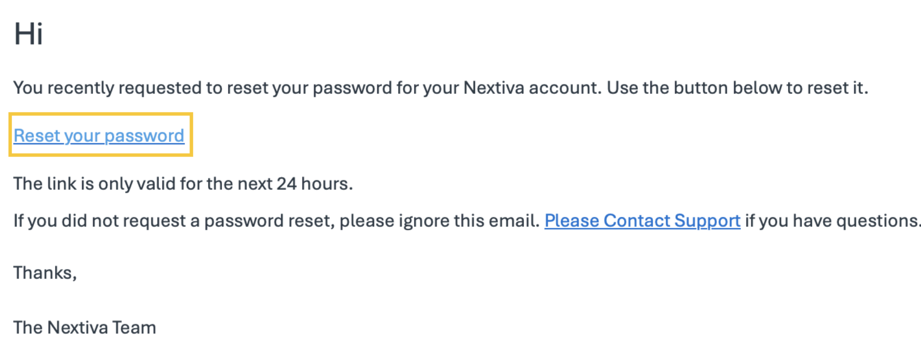


3. If it is your **first time logging in** or to **reset your password**, select **Forgot Password?**



   Find the Reset Password email sent from no-reply@nextiva.com

   i. Select the **Reset Your Password link**.



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

Setting Up Your Agent Profile and Preferences

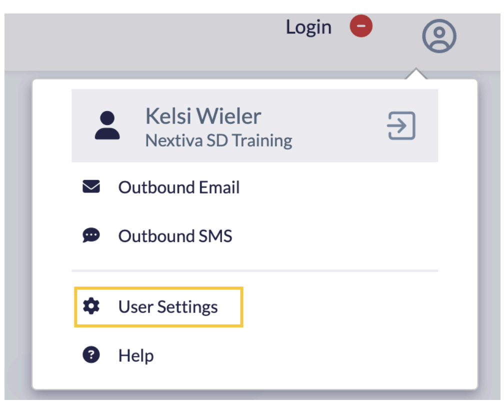
The agent profile and preferences are essential for personalizing the NCC experience and ensuring efficient customer communication. In User settings, there are many options to configure in settings.

Note: All Contact Center settings are visible; however, not all apply to the Voice Only Contact Center product type.

Access User Settings

1. To access User Settings, select **Settings** (avatar icon) from the top right corner. This icon, resembling a person, opens the personal settings menu.

2. Select **User Settings**.



General User Settings

Default Dial Type

The default dial type allows you to select Direct Inward Dialing (DID —also called a phone number). A default dial type can be set to drive consistency in calls. Think of it as the "face" presented to the outside world when making calls.

Campaign: Utilizes a phone number associated with a specific campaign.

Personal: Uses the agent’s direct number.

State: Selects a phone number based on the state or region of the recipient.

Private: Masks the caller ID, displaying a private number to the recipient.

Default Campaign Type

This section lets you choose the preferred campaigns for different types of communication. Setting defaults here can save time by automatically selecting the right campaign when making calls.

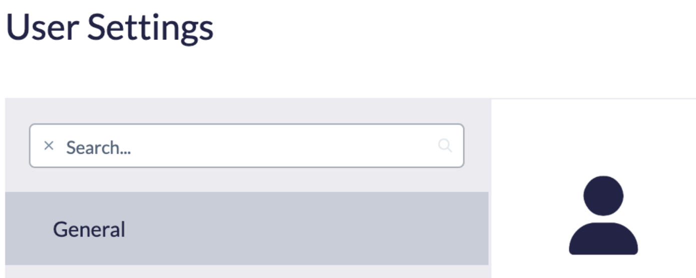
Default Outbound Campaign: Choose the campaign you use most often for making calls.

Default Campaign Extension: If needed, pick a specific extension or internal number to use with your outbound calls.

Note: Fax, SMS, and Email are not included in the Voice Only Contact Center package.

User Icon Photo

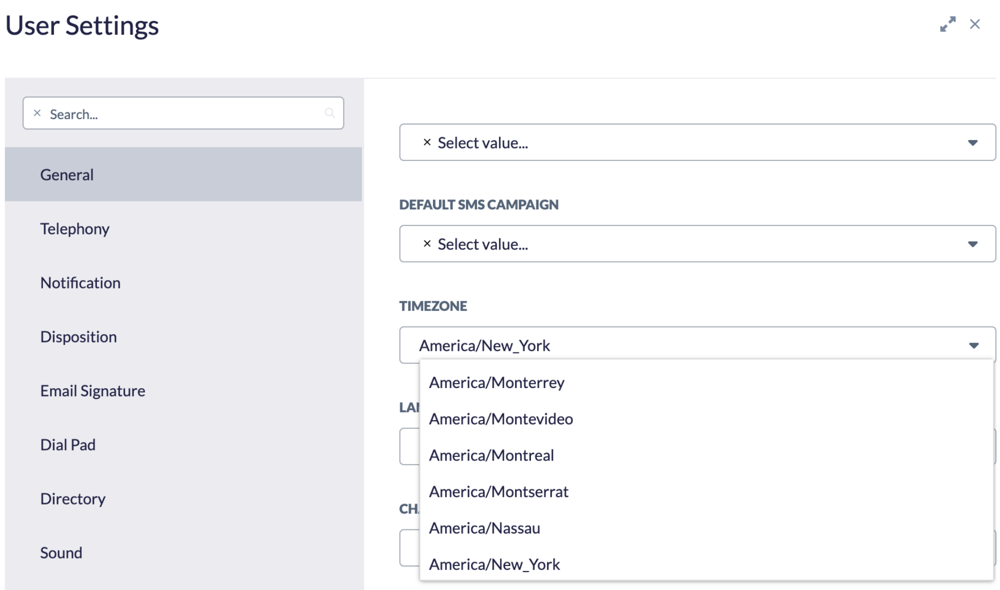
1. In General, select the **user icon**.



2. Select the image to upload. Select **Open**.

Time Zone

1. In General, scroll down to **Time Zone**.



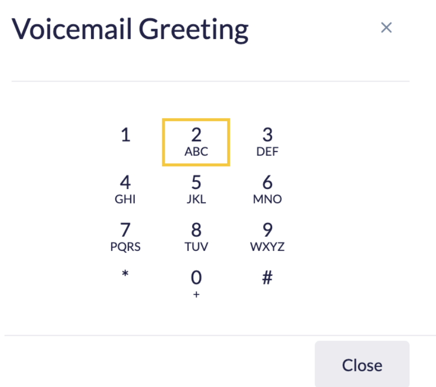
2. Using the dropdown menu, select the **preferred Time Zone**.

Voicemail Greetings

Record Voicemail Greeting

1. Setting the custom **Voicemail Greeting**
2. In General, scroll to the bottom and select **Start Voicemail Greeting Process.**

3. Press **2** to record a person greeting. *Note: Occasionally, this needs to be selected twice.*



4. After the beep, begin recording.
5. Press **2** again to finish the greeting, prompting a beep and saying "Greeting recorded".
6. To hear the greeting, press **1**.

Upload Voicemail Greeting

1. In General, scroll down to **Voicemail Greeting**.
2. Select the **speech bubble icon**.

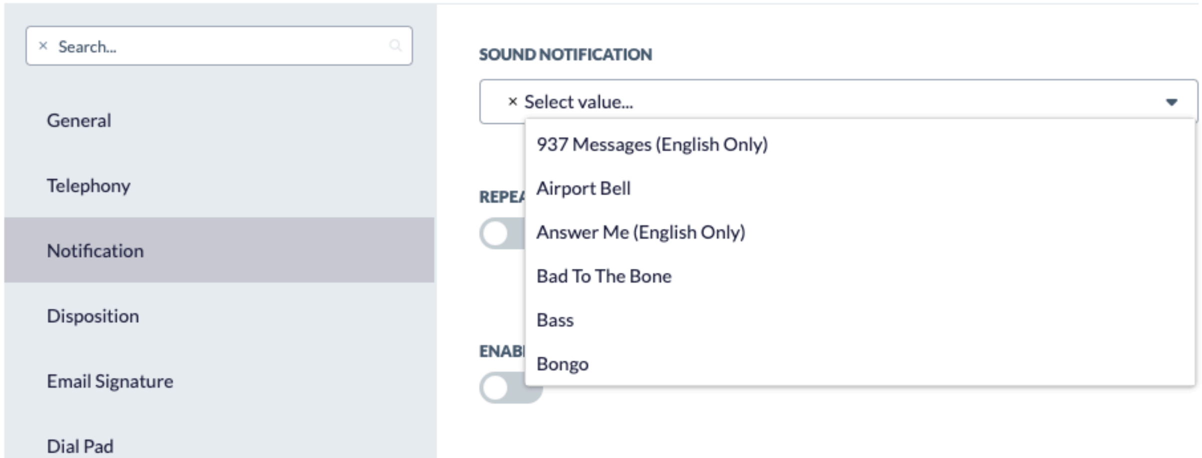
3. Select the audio file.
4. Select **Open**.

Notifications

Notifications can vary per voice workitem, digital workitem, or digital message.

1. On the left-side toolbar, select **Notification**.

2. Use the dropdown menu to select a specific sound for each item type.

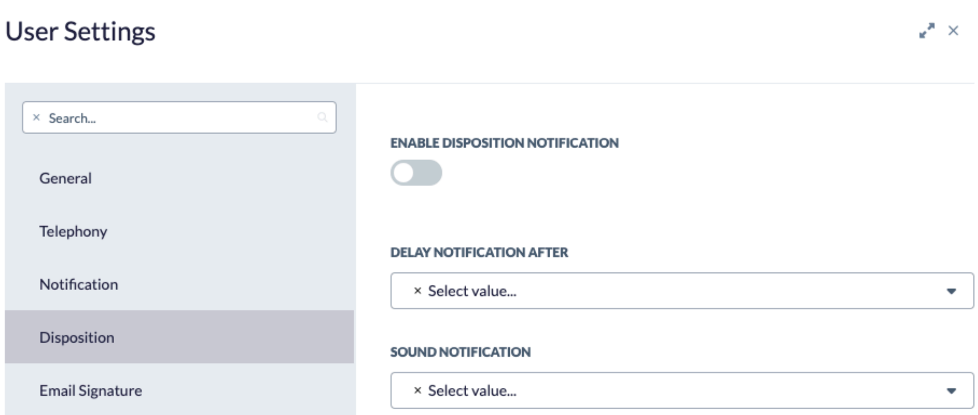


3. Toggle **Repeat Until Answered** to hear the notification until the item is answered.
4. Toggle **Enable Web Notification** to see a web notification. Selecting the notification will redirect you to Nextiva.
    a. For Windows, the notification appears in the bottom right corner of the screen.
    b. For Mac, the notification appears in the top right corner of the screen.

Disposition

A call disposition describes the outcome of a call. The disposition notification serves as a reminder to select a disposition on the workitem.

1. From the left-side User Settings toolbar, select **Disposition**.



2. Toggle **Enable Disposition Notification** to turn on or off the notification.
3. From the dropdown menu, select the disposition notification sound.
4. From the dropdown menu, select the number of seconds to have the notification delayed after a workitem is completed.

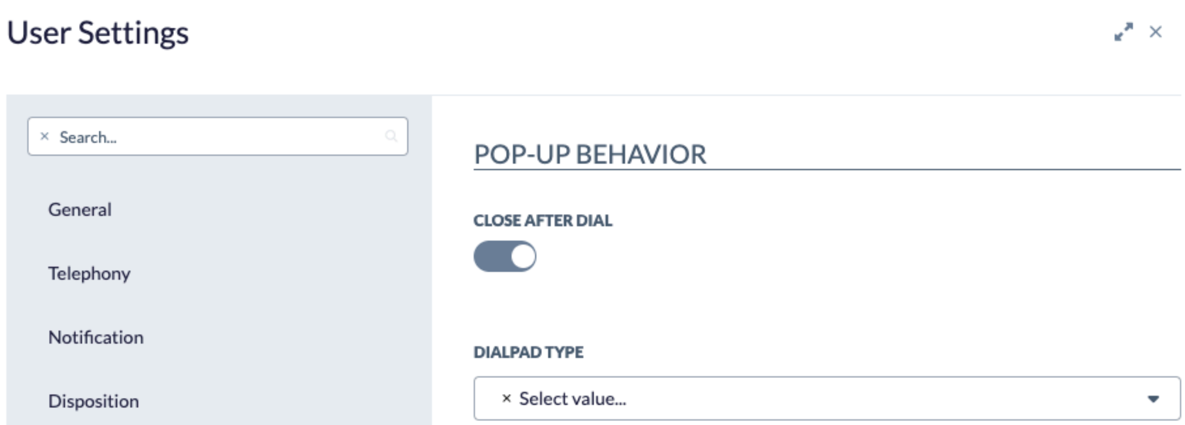
Dial Pad

This customizable dial pad offers both full and minimized views, allowing you to keep it readily available or tucked away as needed. It features an inline display with previously dialed numbers for quick access, enabling you to adjust the campaign and dial type on the fly.

Note: Campaign changes reset upon logout, and dial type selections must be made each time the dial pad is used. To access dial type options, ensure a number is entered before right-clicking the dial icon.

Dial Pad Settings

1. In User Settings, select **Dialpad**.



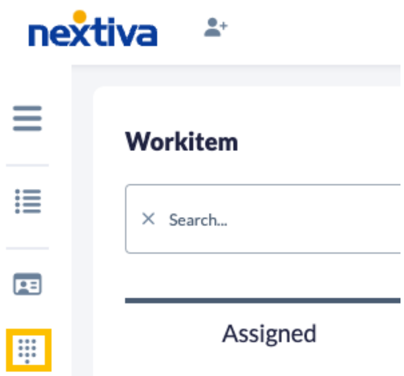
2. Toggle **Close After Dial** to change the pop-up behavior of the dial pad. This will make the dial pad disappear after the dial is completed.
3. **Dial Pad Type** allows you to select your preferred view:
    a. **Full View:** The traditional dial pad, accessible from the header bar.

b. **Minimized:** A smaller, compact dial pad.
Note that the dial pad icon will be removed from the header but can still be accessed from the minimized dial pad.

Inline Dial Pad

The Dial Pad allows users to make calls, similar to a traditional phone dial pad.

To open the dial pad, select the **dial pad icon** on the left-side toolbar.



Positioning

The inline dial pad will initially appear in the middle of the screen. To move it, click and drag the white bar at the top of the dial pad window.

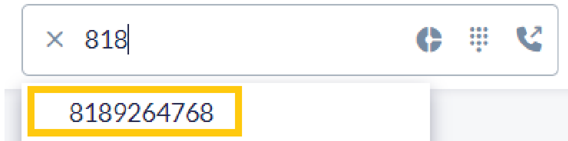
Dialing a Number

There are three ways to dial a number on this virtual dial pad:

1. Using the dialer in the upper right hand corner, insert the phone number and select the **dial icon**.

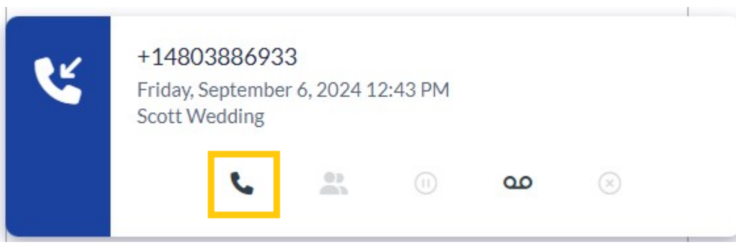
2. Alternatively, you can choose the **dialpad icon** (highlighted) and click on the numbers in the number pad. When ready, select the **dial icon**.

3. There is also an autofill option for previously dialed numbers. When you begin inputting a number, the dialer will populate a dropdown of recently dialed numbers. When you select the number, it will automatically call the number selected.



Answering a Call

To answer an incoming call, simply select the **telephone icon** in the pop-up window that shows up when receiving a call.



Dial Type

The dial type allows you to select the Direct Inward Dialing (DID- also called a phone number) to make the call from. The system offers flexibility to choose a number each call made.

XBert Tip: Think of the dial type as the "face" presented to the outside world when making calls.

Campaign: Utilizes a phone number associated with a specific campaign.

Personal: Utilizes the agent's direct number.

State: Selects a phone number based on the state or region of the recipient.

Private: Masks the caller ID, displaying “private number” to the recipient.

Select a Dial Type

1. Select the icon for the preferred type of dial.
2. The type will darken to show it has been selected, as seen in the image above.
3. The dial type selection will reset upon logging out.

Dial Campaign

The default campaign is set in your user settings in the General section,

To change the campaign temporarily:

1. Select the campaign from the dropdown menu.
2. Place the call.
3. The campaign selection will reset upon logging out.

*XBert Tip: Set Your Default Dial Type. For maximum efficiency, head over to **User Settings** and establish a default Dial Type. This saves the step of selecting it each time a call is made, and ensures consistency in how the calls appear to recipients.*

Speed Dial

The most recently dialed numbers will be displayed in the Speed Dial section of the dial pad.

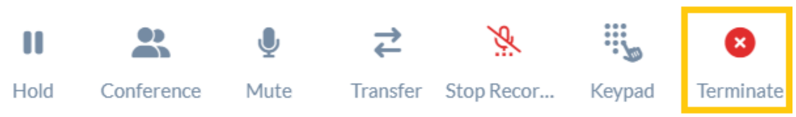
To make a call with the Speed Dial, select the phone icon.

Ending a Call

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

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

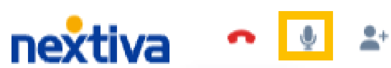
Alternatively, you can choose the terminate icon in the open workitem for the active call.



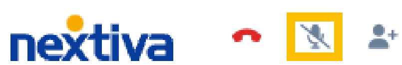
Muting a Call

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

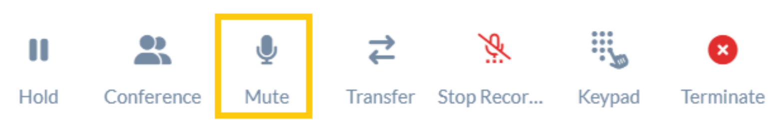
To mute a call, select the **microphone button**.

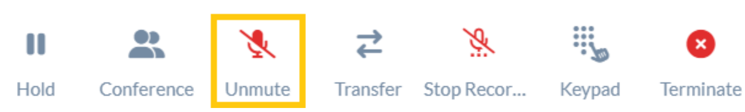


A line over the microphone will appear. Select the icon again to unmute the call.



Alternatively you can mute and unmute in the open workitem for the active call.



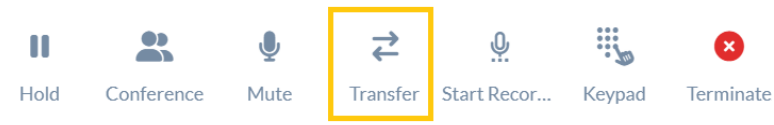


Transferring Calls

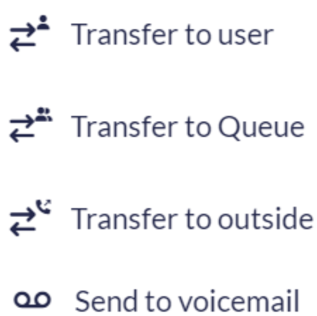
Blind Transfer

A blind transfer, also known as a cold transfer, is when a call is transferred to someone without first speaking with them or providing any prior information.

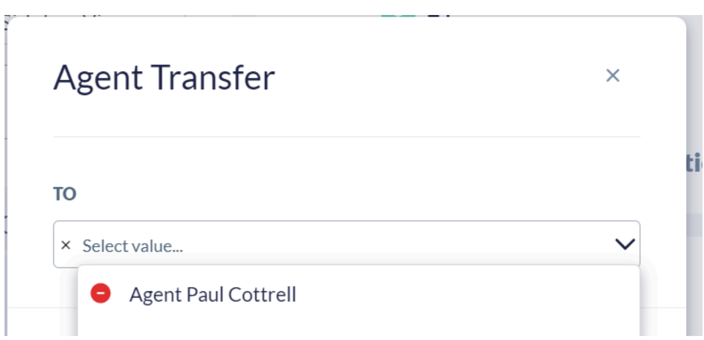
In order to blind transfer a call, first select **Transfer** in your active workitem.



In the drop down menu that appears, choose to blind transfer to a specific user, a specific queue, an outside phone number, or to a user's voicemail.



After you make your selection from the drop down as pictured below and click the blue OK button. Your call will immediately end and your caller has been blind transferred.

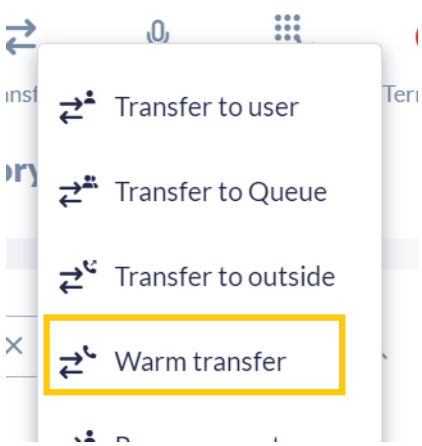


Warm Transfer

A warm transfer occurs when one employee answers a call and then transfers the call to a different employee but passes on any relevant information so that the caller doesn't have to repeat themselves.

In order to warm transfer a call, **you must first be on a two-way call.**

1. Call the third party (using your dial pad, for example.)
2. Once you have the third party on the phone, introduce yourself and provide information to the third party.
3. When ready to warm transfer, select the **transfer button** in the active workitem and select warm transfer.
4. Once the warm transfer is complete, the call will be over for you immediately and the other two parties are connected to each other.
5. Disposition your workitems and change your status back to available.



XBert TIP: Remember the call will immediately end as soon as you click on Warm Transfer. If you are intending to have all three parties on the phone at the same time so you can introduce the person you are leaving them with, follow the instructions for conference call below.

Conference Call

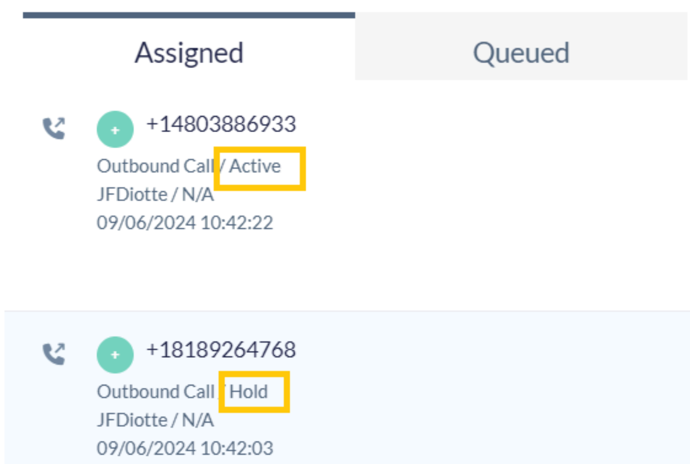
A conference call is a telephone call where three or more people participate simultaneously. It allows people in different locations to have a real-time conversation, as if they were all in the same room. Conference calls are commonly used for business meetings, team discussions, training sessions, and other collaborative purposes.

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

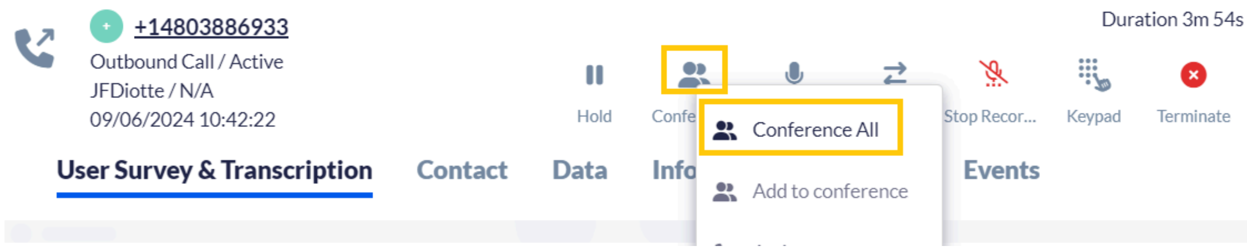
From the Dial Pad

1. To **enter a conference** from the **dial pad**, dial the additional party's number using the dial pad in the upper right hand corner.

2. When you call the third party, the caller you were talking to will automatically be placed on hold. You can see the active call and the call on hold in your workitem list.

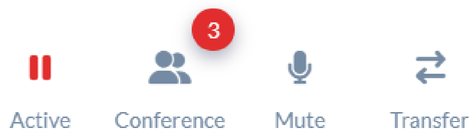


3. When you are ready to merge the call, select **Conference** in the active call and select **Conference All** from the drop down menu.



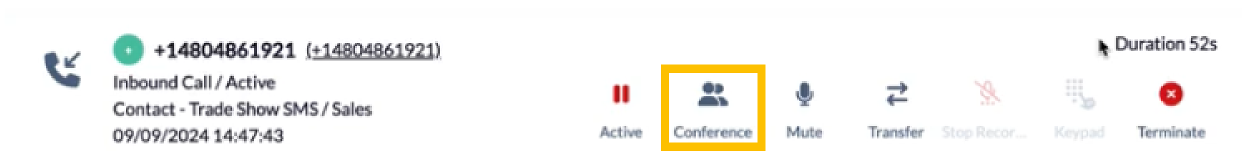
4. All party members will be on the call at the same time.

XBert Tip: The most common number of participants is three, but you can conference in more participants if you repeat the steps. You will see the number of participants above the icon, as seen here.



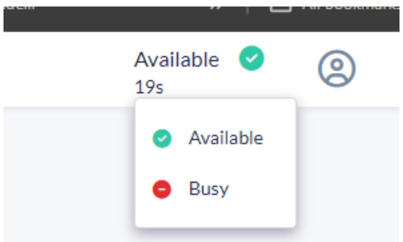
From the **Company Directory**

1. From the **Company Directory** on the left-side toolbar, select the name of the user you wish to add to the call.
2. Select **X** to close the Company Directory box.
3. Select **Conference** to add the new party to the phone call.



User Status

Agents can change their user status by clicking on the status in the upper right hand corner. From the dropdown menu, you can select the status you wish to put yourself into. You will be put into that status immediately (meaning there is no save button to click.) User status will also automatically update when accepting or finishing a workitem.

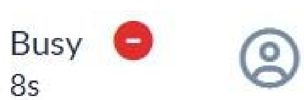


Available

Meaning: Ready to receive workitems

Outcome: The ACD (automatic call distributor) will start routing workitems to you based on queue settings

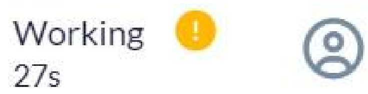
Busy



Meaning: Temporarily Unavailable

Outcome: Your queue(s) will “skip over'' you and send a waiting workitem to the next available agent instead.

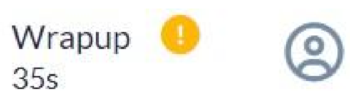
Working



Meaning: Actively handling an interaction.

Outcome: Automatically activated when you accept a work item.

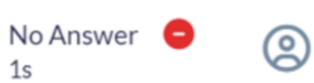
Wrapup



Meaning: Time allotted for completing after-call tasks, like updating notes or selecting a new disposition.

Outcome: Automatically activated when you end a call.

No Answer



Meaning: The workitem was not answered in the maximum allocated time and was redistributed to the next available agent.

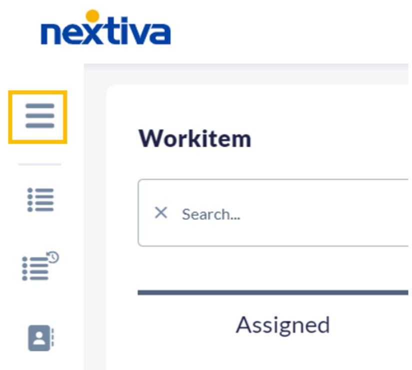
Outcome: Automatically activated when a workitem is missed.

Workspace

Customizing Your Workspace

By taking the time to customize your workspace, you can create a personalized and efficient environment that supports your unique workflow and enables you to deliver the best possible customer experiences. Remember, the Options menu is your gateway to unlocking the full potential of Nextiva Contact Center.

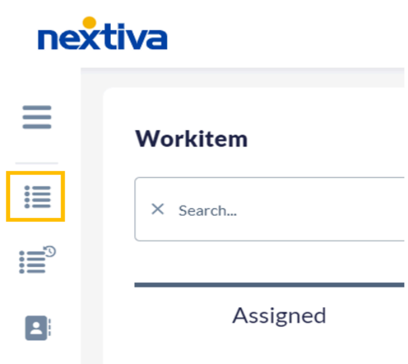
Select the **Options icon** from the left menu bar.
This icon opens a world of possibilities to tailor your NCC experience.



Core Workspace Features

Workitems

This is your central hub for managing customer interactions. It displays incoming calls, emails, chats, and other tasks assigned to you.



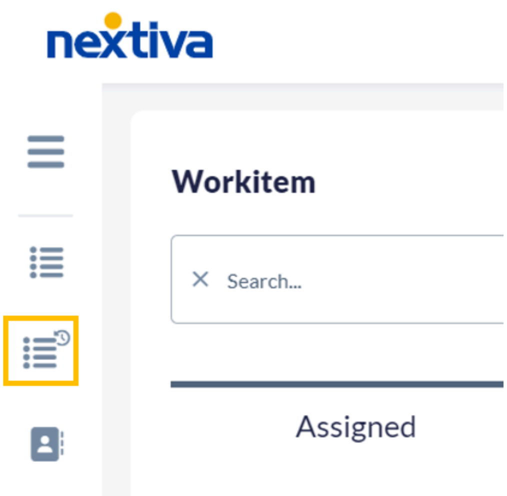
History

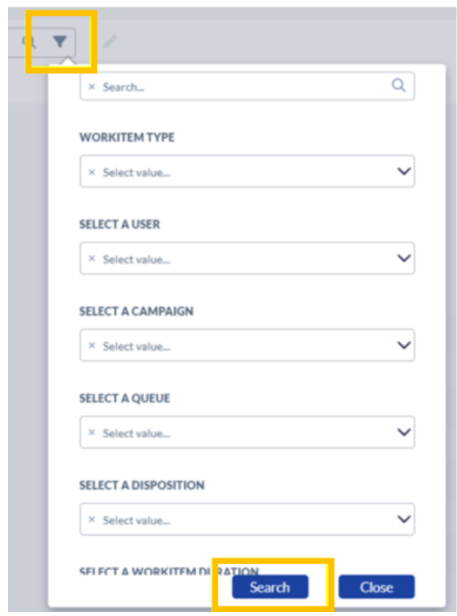
Access a comprehensive record of past interactions with customers. This can be invaluable for understanding their needs and preferences.

Filter History

Filter by date range, interaction type, and more to find specific conversations.

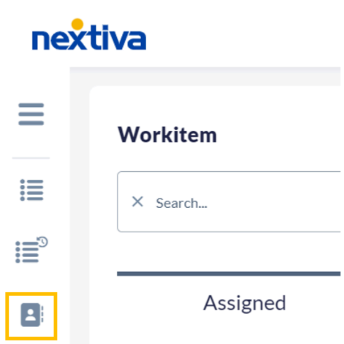
1. From the workitem, select the **filter** icon in the top-right corner.
2. Select the information you wish to filter by.
3. Select **Search**.





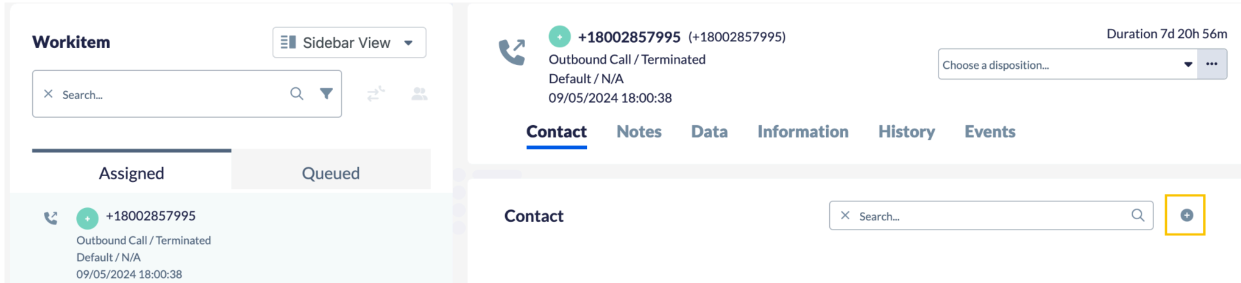
Contacts

View and manage your customer contact information, including names, phone numbers, email addresses, and any notes you've added.

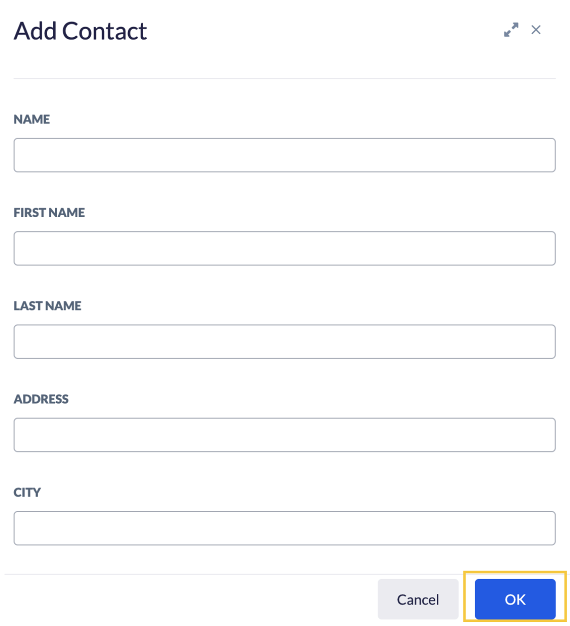


Add a New Contact

1. Select the **plus sign (+)** icon next to the contact.

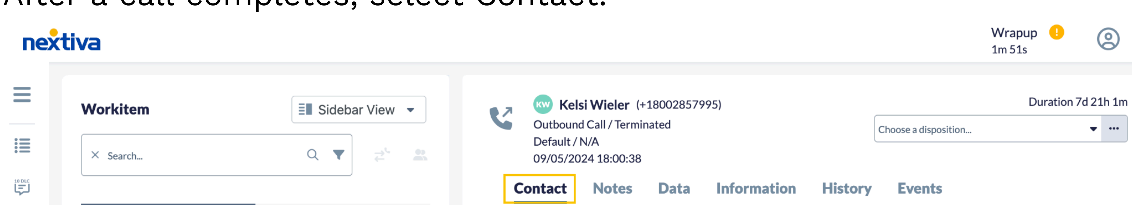


2. Enter contact information.
3. Select **OK** to save.



Edit Existing Contact

1. After a call completes, select Contact.



2. Make the changes to the contact.
3. Select another cell; the update automatically saves.

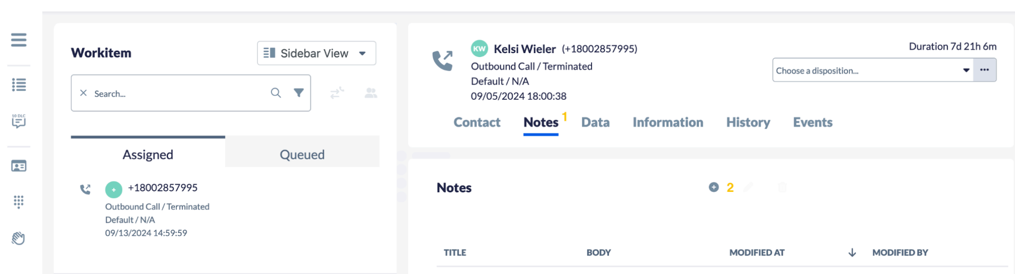
Add Contact Notes

Leverage the power of Contact Notes to ensure your future phone calls are productive and personalized. Beyond simple reminders, these notes can store invaluable details like:

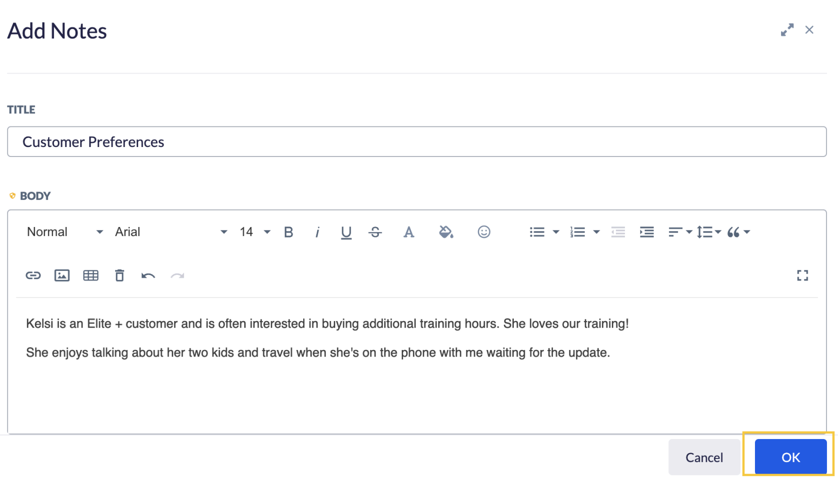
- Customer Preferences: How they like to be addressed, preferred communication channels, or specific business practices they follow.
- Hobbies, projects they mentioned, or what they're passionate about.
- Previous Interactions: Key points from past conversations, any action items to follow up on, or potential pain points they've expressed.

This wealth of information, readily accessible within your team, empowers you to build rapport, tailor your approach, and demonstrate genuine interest in your clients.

1. After a call completes, select **Notes**.



2. Select the **plus sign (+)**.
3. Add notes.
4. Select **OK** to save.



Other Contact Features

History: Filter the event history.

Events: See a related log of events related to outbound and inbound calls made by the contact.

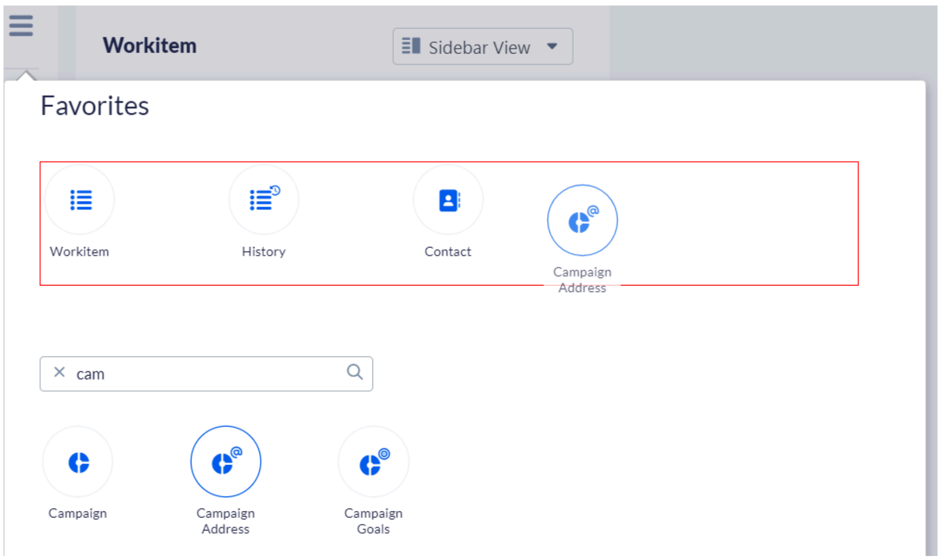
Events

DATE ↑	USER	QUEUE	RESULT
09/05/2024 18:00:38	Kelsi Wieler	N/A	Outbound Call Started
09/05/2024 18:00:38	Kelsi Wieler	N/A	Assigned
09/05/2024 18:00:39	Kelsi Wieler	N/A	Ring Time
09/05/2024 18:00:39	Kelsi Wieler	N/A	Call Connected
09/05/2024 18:00:44	Kelsi Wieler	N/A	User Terminated By Hang Up

Personalize Your Favorites

Identify the features you use most frequently and make them more accessible.

1. Open **options** on left side toolbar.
2. Search the widget you would like to make a favorite.
3. Click drag and drop the widge into the red Favorites box.

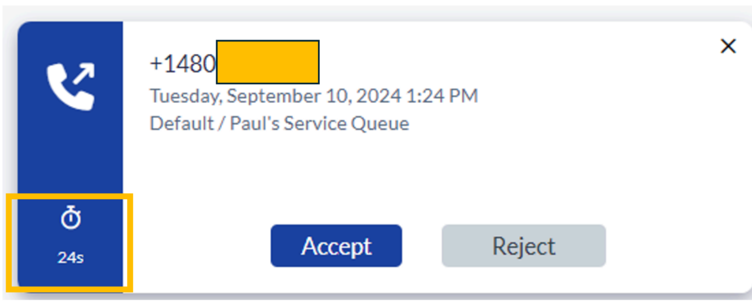


Managing Workitems

Monitor Incoming Workitems

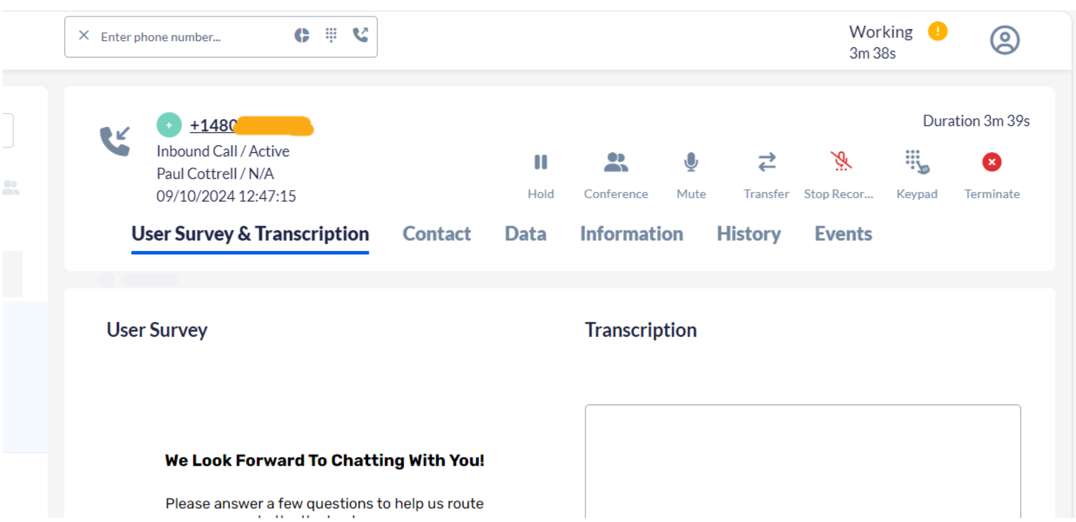
New interactions (calls, emails, chats) appear in the bottom right corner.

XBert Tip: Pay close attention to queued workitems with timers.



Open a Workitem

Select the workitem to view details in the Detailed View.

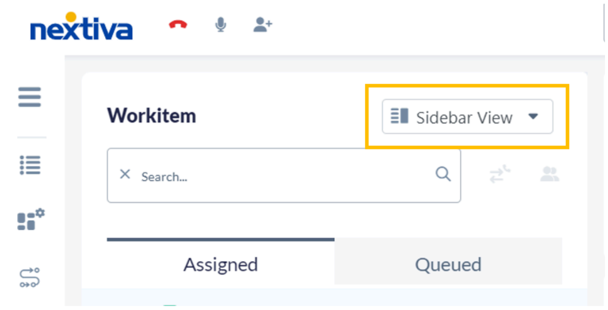


Switch Views (optional)

Switch between List View and Sidebar View, depending on your workitem preference.

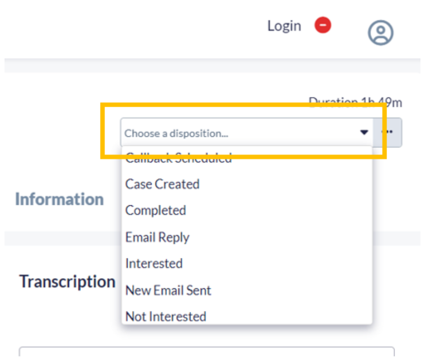
a. Use **List View** to only view your current workitem

b. Use **Sidebar View** to manage multiple workitems simultaneously.



Select Disposition

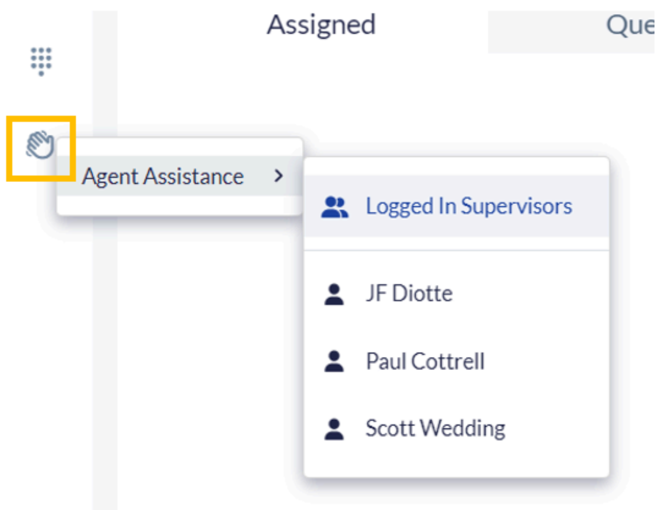
After completing a queued workitem, select the appropriate outcome category from the available options.



Agent Assistance

Agent assistance is designed to provide you with quick and easy access to your supervisor or available supervisors when you encounter a situation during a call that requires additional support.

1. From the Options Menu on the left side toolbar, select **Agent Assistance**.



2. Choose the preferred Supervisor option.

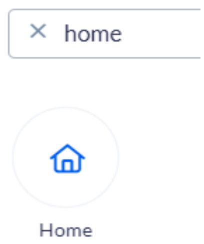
    a. **Supervisor's Name** to send a direct message or transfer a call to your supervisor for immediate help.

    b. **Logged In Supervisors** to reach multiple supervisors at once. This can be useful if your supervisor is unavailable or if the situation requires input from multiple supervisors.

Monitor Your Performance

Monitor your performance through the performance widgets on the home page.

Access **Home** (house icon) in the favorites section.
This opens your personalized dashboard.

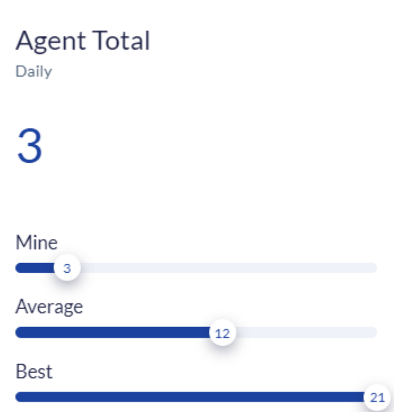


XBert Tip: Initially, widgets stacked on top of one another. Click and drag them to spread them apart.

Performance Widgets

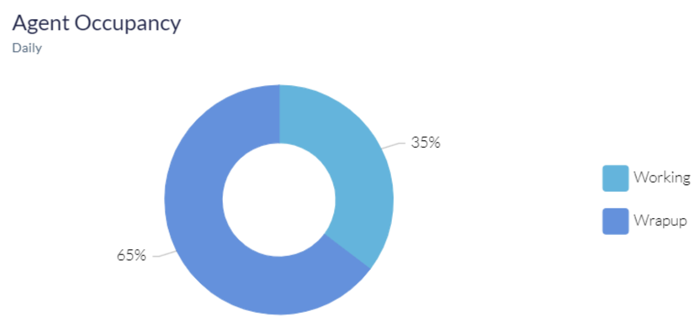
Agent Total

Compare your performance metrics (e.g., calls handled, average handle time) with the average and top-performing agents in your team. This gives you a quick snapshot of how you're doing relative to your peers.



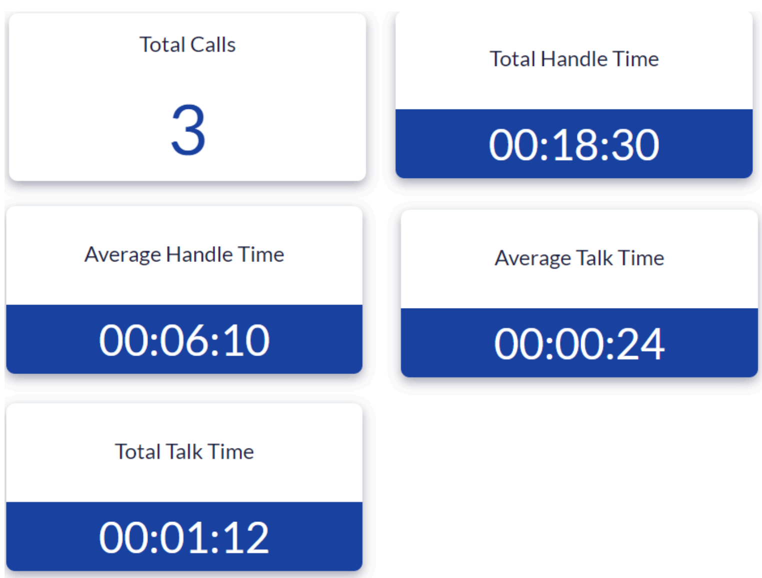
Agent Occupancy

Track your time spent in various statuses (Available, Working, Wrap-up, etc.). This can help you identify areas where you can optimize your workflow and improve your productivity.



Key Performance Indicators (KPIs)

Monitor important metrics relevant to your role, such as talk time, wrap-up time, handle time, number of calls answered, and customer satisfaction ratings. These KPIs can help you understand your strengths and areas for improvement. For example:

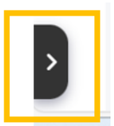


Performance Dashboard

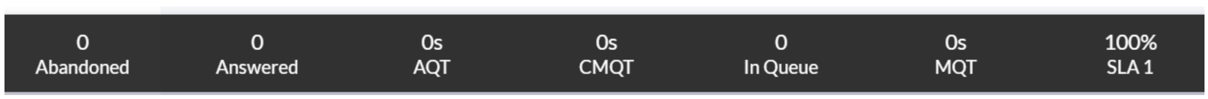
See real-time data on customers waiting, answered workitems, maximum queue time, and abandoned calls.

1. Ensure you've selected the 'Available' status within your system. This indicates that you're ready to take calls and will enable the dashboard icon.

2. Select the black arrow icon in the bottom left corner.



3. This will expand the Performance Dashboard, revealing real-time data about your queue's activity.



Abandoned: # of customers who hung up before reaching an agent

Answered: # of workitems accepted today

AQT (Average Queue Time): Average length of time the customer waits in queue for a call to be answered.

CMQT (Current Max Queue Time): How long the current wait time is

MQT (Maximum Wait Time): The longest wait time for the day

SLA (Service Level Agreement): Threshold that the admin can set for the queue to determine if calls accepted in that queue were answered according to the policy of the company

In Queue: # of customers waiting to speak to an agent

4. Select the black arrow again to close the dashboard.

Additional Resources

Agent Guide

Agent LMS

All Things NCC Agent Webinar

Nextiva Contact Center Support hub