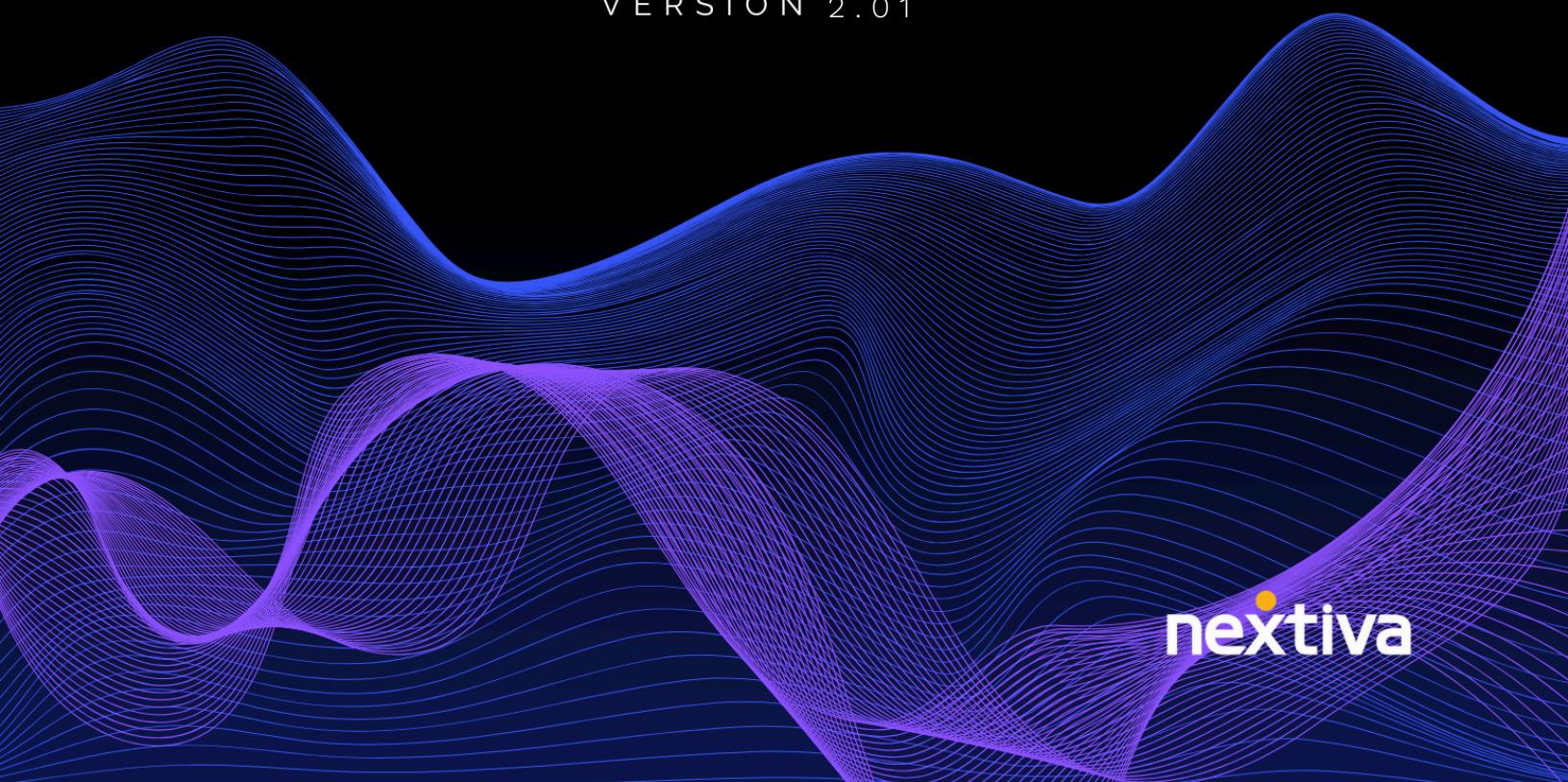


N E X T I V A C O N T A C T C E N T E R

C H A T  
U S E R  
G U I D E

CX TRAINING TEAM  
VERSION 2.01



nextiva

The **NCC Chat Guide** equips agents with the tools and knowledge to manage customer interactions effectively through chat. Chat functionality allows businesses to provide customers with their preferred communication channel, ensuring a seamless and personalized experience. By leveraging chat, agents can handle multiple conversations simultaneously, improving efficiency and response times.

Nextiva's chat system integrates advanced features such as AI-powered chatbots, CRM integration, and response templates, enabling agents to deliver faster service while maintaining high-quality customer support. Whether resolving inquiries or escalating complex issues, this guide ensures agents can confidently navigate every aspect of the chat process:

- **Provide Real-Time Support:** Agents address customer inquiries about products, services, or account details instantly.
- **Manage Multiple Conversations:** Agents engage with several customers simultaneously, reducing wait times and improving overall efficiency.
- **Leverage AI Assistance:** AI chatbots handle routine questions and escalate unresolved issues to live agents for personalized attention.
- **Streamline Communication:** Agents use tools like response templates and chat history to ensure consistent, accurate responses across all interactions.

## Incoming Chats

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# Incoming Chats

## Understanding Incoming Chats

When customers start a chat, the experience may vary depending on how the system is configured. If Nextiva's AI-powered Chat Bot, **NextIQ**, is enabled, customers may first interact with the Chat Bot. NextIQ uses artificial intelligence (AI) Natural Language Processing (NLP) to provide automated responses, answering common questions and resolving issues without needing live agent involvement. In many cases, NextIQ can fully resolve the inquiry to address the customer's needs, and the chat does not escalate to a live agent.

Alternatively, if NextIQ cannot resolve the customer's inquiry or if live assistance is required, the chat will be routed to a live agent. When this happens, the agent will have access to the full conversation history between the customer and NextIQ (if applicable). This ensures a smooth transition and allows the agent to quickly understand the context of the customer's issue.

**For accounts where AI is not enabled, customers will connect directly with a live agent when starting a chat.** In this scenario, agents will begin interacting with customers immediately without any prior automated assistance.

## Receiving an Incoming Chat

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.

This is the icon for Chat Workitems:

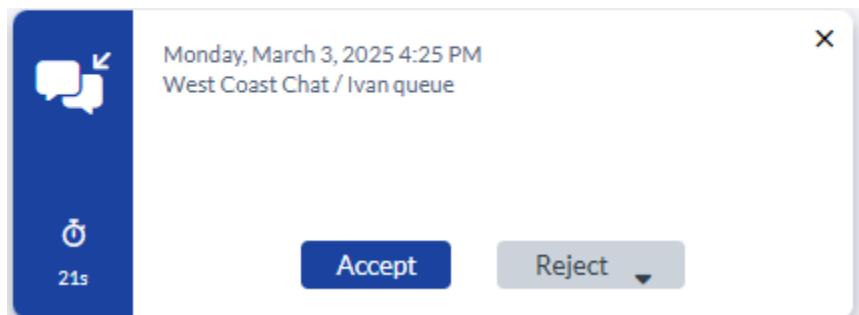


When you are available and an incoming chat is presented to you, the Chat Notification will appear in the lower, right-hand corner of your screen. The pop-up window consists of the following elements:

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

A timer representing the number of seconds the user has before the notification disappears. If the agent selects 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 select 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 select the send button to send the message.

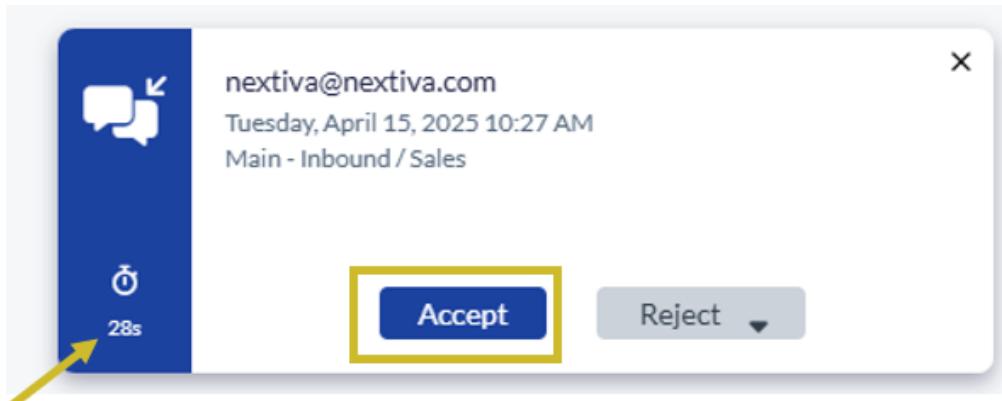
## Inbound Chat Offer



The Inbound Chat Offer popup will appear when an agent is available and a chat comes into a queue for a chat campaign.

## Accepting a Chat Offer

To accept the chat, select the **Accept** button. The chat dialog screen will appear directly in the middle of your workspace.



### XBert Tips:

- Be aware of the **timer** for the workitem forcing you to make a selection before it runs out.
- You will see a timestamp 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.

While the workitem is live, select the **User Survey** tab.



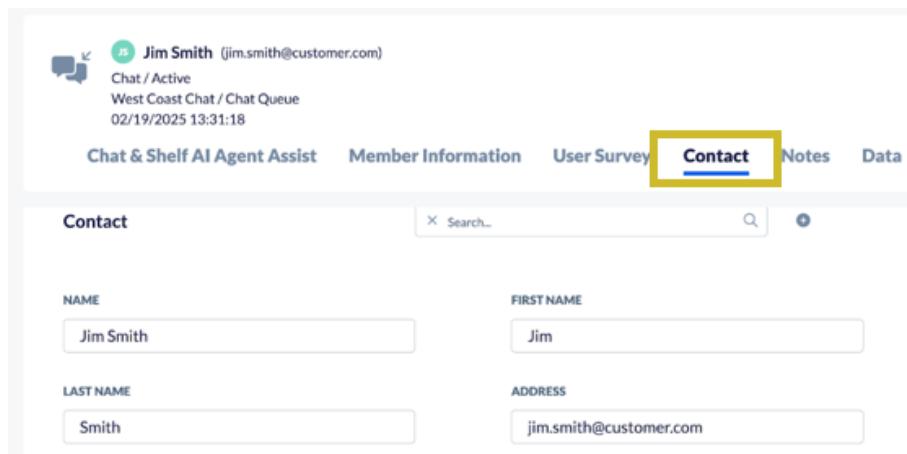
The screenshot shows a contact profile for Jim Smith. At the top, there is a small icon of a speech bubble with a checkmark, followed by the name 'Jim Smith (jim.smith@customer.com)', 'Chat / Active', 'West Coast Chat / Chat Queue', and the date '02/19/2025 13:31:18'. Below this, there are several tabs: 'Chat & Shelf AI Agent Assist', 'Member Information', 'User Survey' (which is highlighted with a yellow box), 'Contact' (which is underlined in blue), 'Notes', and 'Data'. A search bar with the placeholder 'Search...' is positioned below the tabs. Under the 'Contact' tab, there are two input fields: 'NAME' containing 'Jim Smith' and 'FIRST NAME' containing 'Jim'.

For questions on filling out the user survey please speak to your supervisor or administrator.

## Contacts Tab

The contact screen provides you with the ability to get a quick look at essential customer information.

1. After accepting a workitem, select on the **Contact** tab to show the “Mini CRM” screen. Here you can add or edit information about the customer.

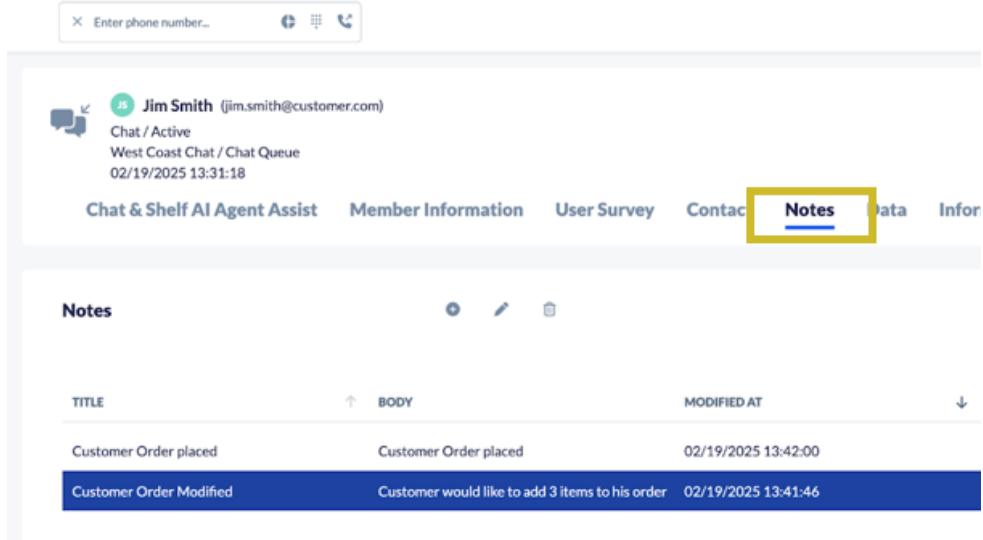


The Contacts tab includes fields for name, address, time zone, coordinates, date of birth, and customer ID numbers or case numbers. Depending on how your system is configured, you may be able to view the same contact information in a native, third-party CRM system that Nextiva is integrated with. The use of tabs here is to provide a shortcut to that section. You can also scroll down to the section you have selected.

## Notes Tab

Selecting the “Notes” tab allows you to see existing notes on the customer taken by other agents and allows you to create a new note. This note-taking capability is set by your system administrator.

1. Select **Notes** in the Workitem banner.



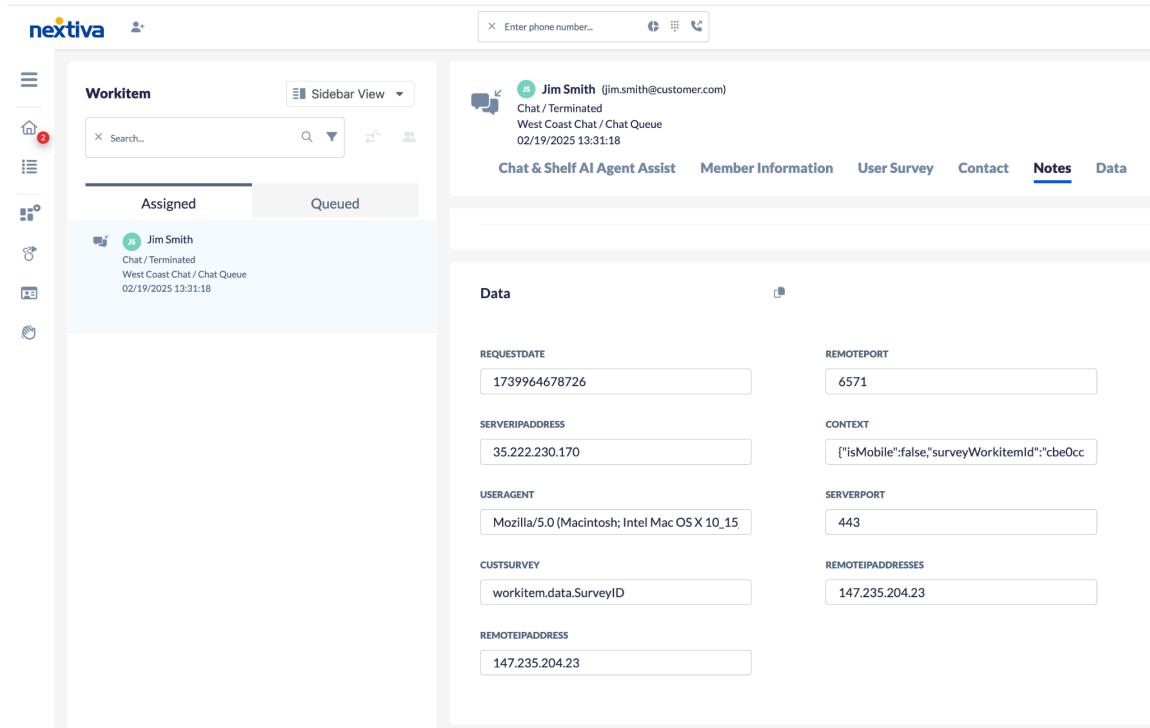
The screenshot shows the Workitem banner for a customer named Jim Smith. The banner includes a search bar, a phone icon, and a video icon. Below the banner, Jim Smith's information is displayed: Chat / Active, West Coast Chat / Chat Queue, and the date 02/19/2025 13:31:18. The banner has several tabs: Chat & Shelf AI Agent Assist, Member Information, User Survey, Contact, Notes, Data, and Infor. The Notes tab is highlighted with a yellow box. Below the banner, a table titled 'Notes' is shown with columns: TITLE, BODY, and MODIFIED AT. The table contains two rows of data.

TITLE	BODY	MODIFIED AT
Customer Order placed	Customer Order placed	02/19/2025 13:42:00
Customer Order Modified	Customer would like to add 3 items to his order	02/19/2025 13:41:46

2. Select the note you would like to view.
3. Can we edit or close the notes? What else can they do?

## Data Tab

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



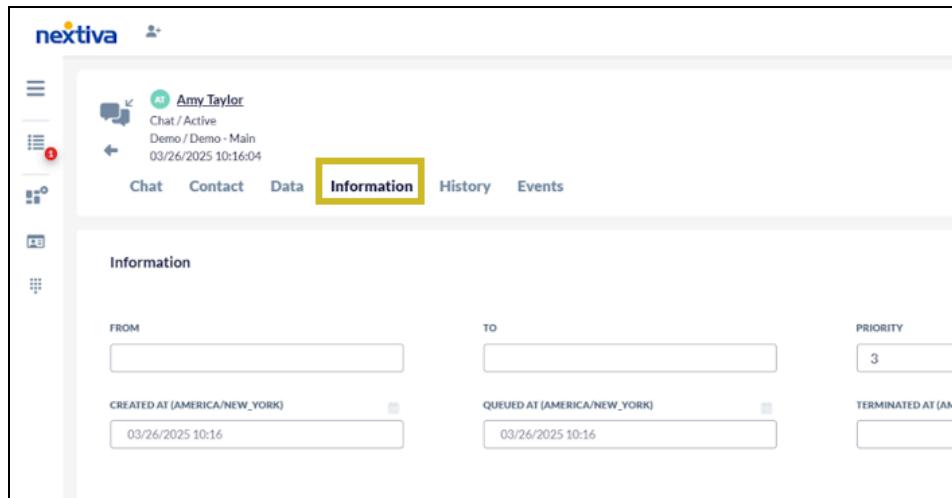
The screenshot shows the Nextiva interface with the 'Data' tab selected. The top navigation bar includes 'Sidebar View', a search bar, and various icons. The main area is divided into sections: 'Workitem' (containing 'Assigned' and 'Queued' tabs, with a list for Jim Smith), 'Chat & Shelf AI Agent Assist', 'Member Information', 'User Survey', 'Contact', 'Notes' (selected), and 'Data'. The 'Data' section contains several data fields with values:

REQUESTDATE	1739964678726	REMOTEPORT	6571
SERVERIPADDRESS	35.222.230.170	CONTEXT	{"isMobile":false,"surveyWorkitemId":"cbe0cc...}
USERAGENT	Mozilla/5.0 (Macintosh; Intel Mac OS X 10_15	SERVERPORT	443
CUSTSURVEY	workitem.data.SurveyID	REMOTEIPADDRESSES	147.235.204.23
REMOTEIPADDRESS	147.235.204.23		

## Information Tab

The Information tab provides details on the workitem including priority, queue information, and start and stop times. These are uneditable fields and just display information.

1. While working on a workitem, select the **Information** tab.

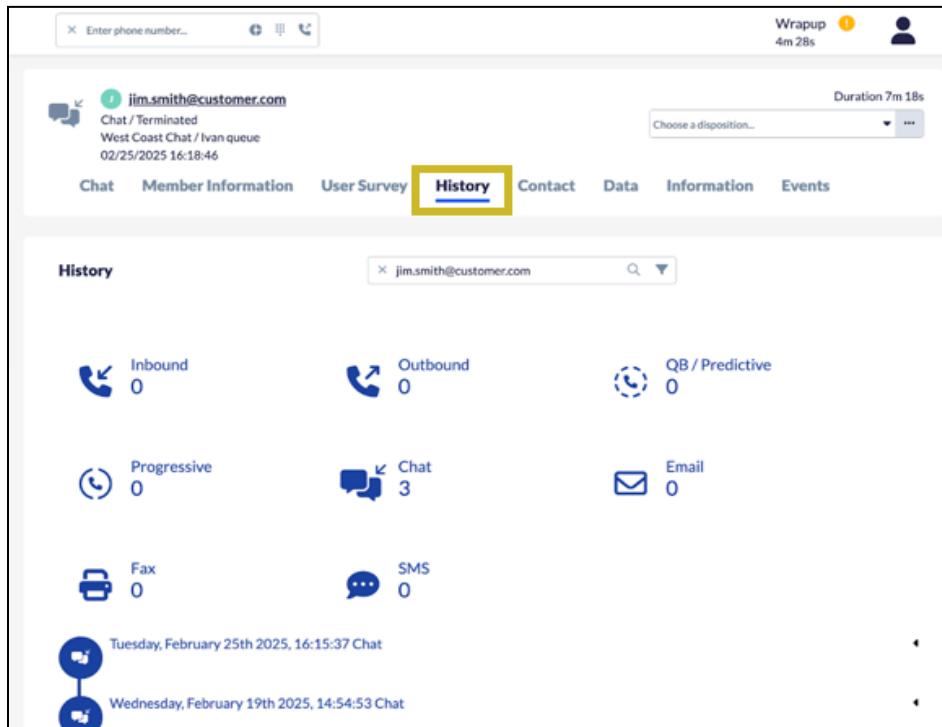


The screenshot shows the Nextiva software interface. At the top, there is a header with the Nextiva logo and a user profile. Below the header, there is a navigation bar with tabs: Chat, Contact, Data, **Information**, History, and Events. The Information tab is highlighted with a yellow box. On the left side, there is a sidebar with various icons and a red notification badge. The main content area is titled "Information" and contains several data fields. The "FROM" field is empty. The "TO" field is empty. The "PRIORITY" field contains the value "3". Below these, there are two timestamp fields: "CREATED AT (AMERICA/NEW\_YORK)" showing "03/26/2025 10:16" and "QUEUED AT (AMERICA/NEW\_YORK)" showing "03/26/2025 10:16". The "TERMINATED AT (AMERICA/NEW\_YORK)" field is partially visible and empty.

## History Tab

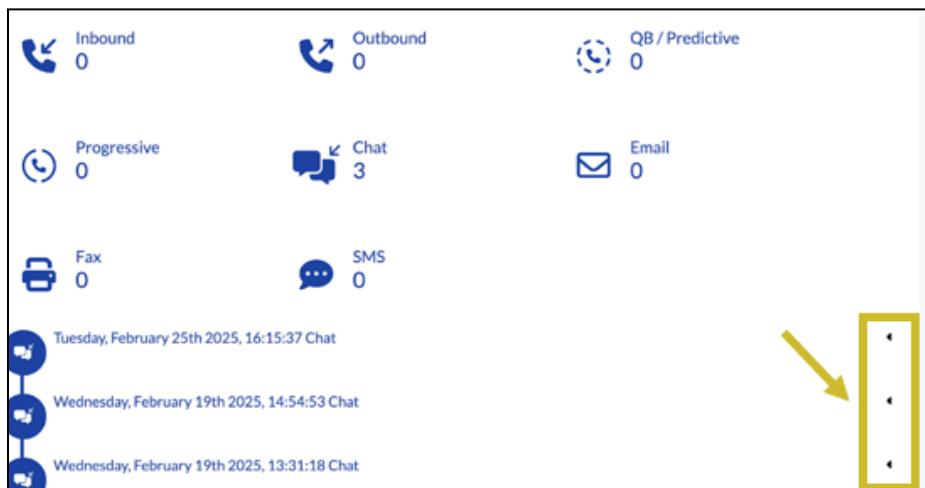
The history tab reveals a chronological timeline of interactions with the customer.

1. While the workitem is live, select the **History** tab.



The screenshot shows the Nextiva interface with the History tab selected. At the top, there is a search bar with placeholder text 'Enter phone number...', a toolbar with icons for phone, email, and other communication, and a status bar showing 'Wrapup 1 4m 28s'. Below the toolbar, a customer profile for 'jim.smith@customer.com' is displayed, showing a chat history from 'West Coast Chat / Ivan.queue' on '02/25/2025 16:18:46'. A dropdown menu for 'Choose a disposition...' is open. The main navigation bar includes Chat, Member Information, User Survey, History (which is highlighted with a yellow box), Contact, Data, Information, and Events. The History section shows a grid of interaction types: Inbound (0), Outbound (0), QB / Predictive (0), Progressive (0), Chat (3), Email (0), Fax (0), and SMS (0). Below the grid, a timeline shows two recent chats: 'Tuesday, February 25th 2025, 16:15:37 Chat' and 'Wednesday, February 19th 2025, 14:54:53 Chat'.

2. Select the arrow from the right side of the screen that corresponds with a stored workitem.



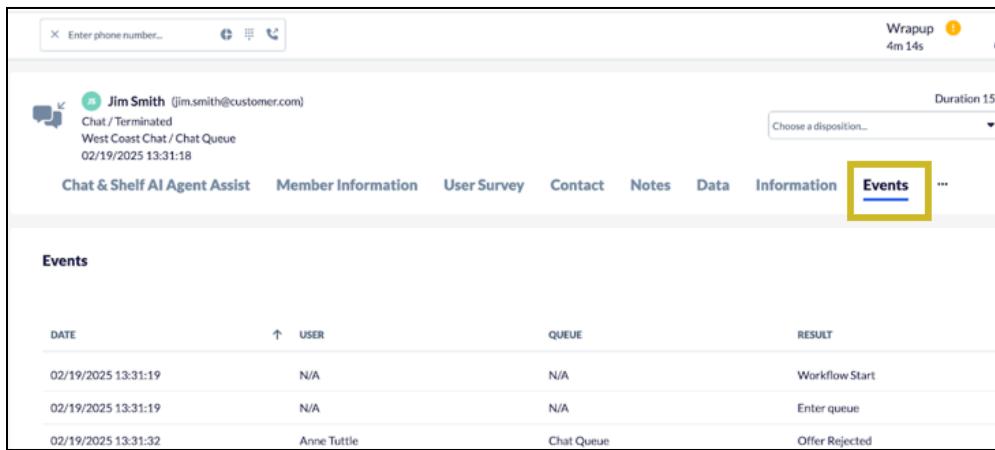
The screenshot shows the Nextiva interface with the History tab selected. The layout is identical to the first screenshot, but a yellow box highlights the vertical scroll bar on the right side of the screen, and a yellow arrow points to it, indicating where to select a stored workitem.

3. More detail will open according to the arrow selected.

## Events Tab

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

Select Events in the Workitem banner to open the Events tab.



The screenshot shows the Workitem banner with the 'Events' tab selected. The banner includes a search bar, a 'Wrapup' section with a duration of 4m 14s, and a 'Choose a disposition...' dropdown. The contact summary for Jim Smith (jim.smith@customer.com) shows a Chat / Terminated status, West Coast Chat / Chat Queue, and the date 02/19/2025 13:31:18. Below the banner is a navigation bar with tabs: Chat & Shelf AI Agent Assist, Member Information, User Survey, Contact, Notes, Data, Information, and Events (which is highlighted with a yellow box). The main content area is titled 'Events' and contains a table with the following data:

DATE	USER	QUEUE	RESULT
02/19/2025 13:31:19	N/A	N/A	Workflow Start
02/19/2025 13:31:19	N/A	N/A	Enter queue
02/19/2025 13:31:32	Anne Tuttle	Chat Queue	Offer Rejected

### Selection of Timeline Events

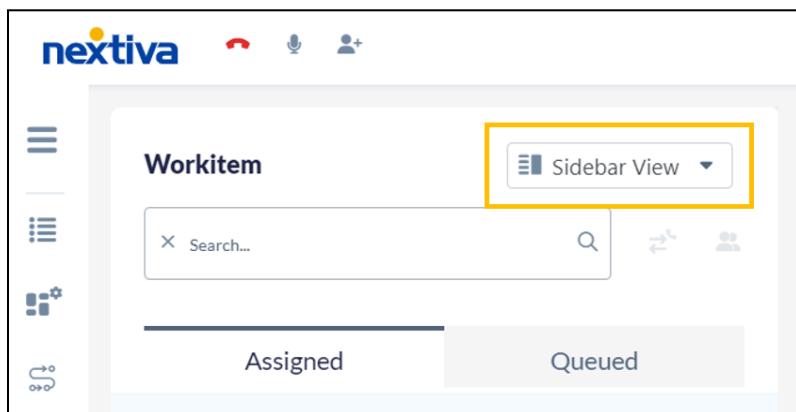
By clicking the “down arrow” icon associated with a particular timeline item, the item detail will expand to include more information.

## Active Chat Workitems

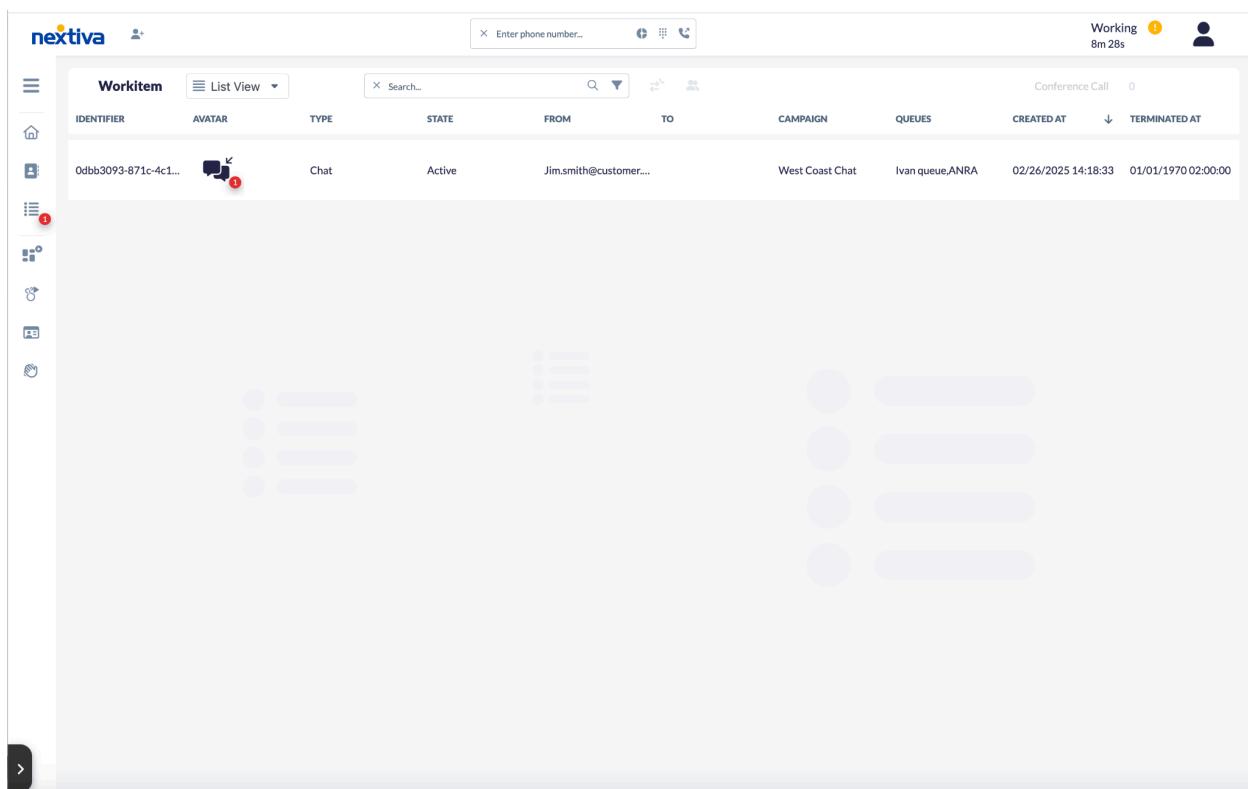
### Views

You can toggle between different views of your live or waiting workitems by selecting **Sidebar View** or **List view**.

1. From your Workitem page, select the dropdown from the top left to change the view.



This is what an active chat workitem looks like in **list view**.



IDENTIFIER	AVATAR	TYPE	STATE	FROM	TO	CAMPAGIN	QUEUES	CREATED AT	TERMINATED AT
0dbb3093-871c-4c1...		Chat	Active	Jim.smith@customer...		West Coast Chat	Ivan queue,ANRA	02/26/2025 14:18:33	01/01/1970 02:00:00

This is what an active chat workitem looks in **detail view**.

Workitem Sidebar View

Assigned Queued

Chat / Active West Coast Chat / Ivan queue 02/26/2025 14:18:40

Chat Member Information User Survey Contact Data Information History Events

Are you referring to order number QZ21368?

Jim.smith@customer.com 14:20 Yes that's the one Stan 14:21 I am looking at the order and it has already gone to fulfillment and is getting picked up today. It is not possible to add to that order I am afraid

Jim.smith@customer.com 14:21 I wanted to avoid the additional shipping cost Stan 14:22 Can you tell me the items you wanted to add to the shipment

Jim.smith@customer.com 14:23 yes I wanted to order 3 gross of Grapple Grommets Stan 14:25 I see from our records that you are a frequent customer and although I cannot add the Grapple Grommets to the existing order I can generate a new order and waive the shipping cost

Remaining characters: 1024

## Chat View

1. To open the chat conversation for the workitem, select on the **Chat** tab

nextiva@nextiva.com Chat / Active Main - Inbound / Customer Service 04/23/2025 13:25:18

User Survey Chat Contact Data Information History Events

Nextiva Contact Center 13:26 Please wait while I transfer you to an agent who can assist you.

Robert Trujillo 13:26 Hello, my name is Robert. How can we help you?

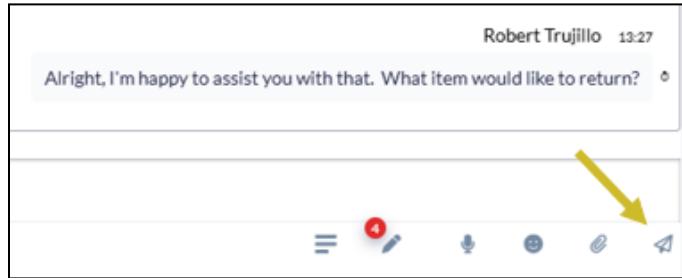
nextiva@nextiva.com 13:26 Hi Robert. I need some help returning an item

Robert Trujillo 13:27 Alright, I'm happy to assist you with that. What item would like to return?

Remaining characters: 1024

**XBert Tip:** You will see a chat window divided into a large upper window and a small lower window. The upper window allows you to view the entire conversation, the bottom window allows you to send messages.

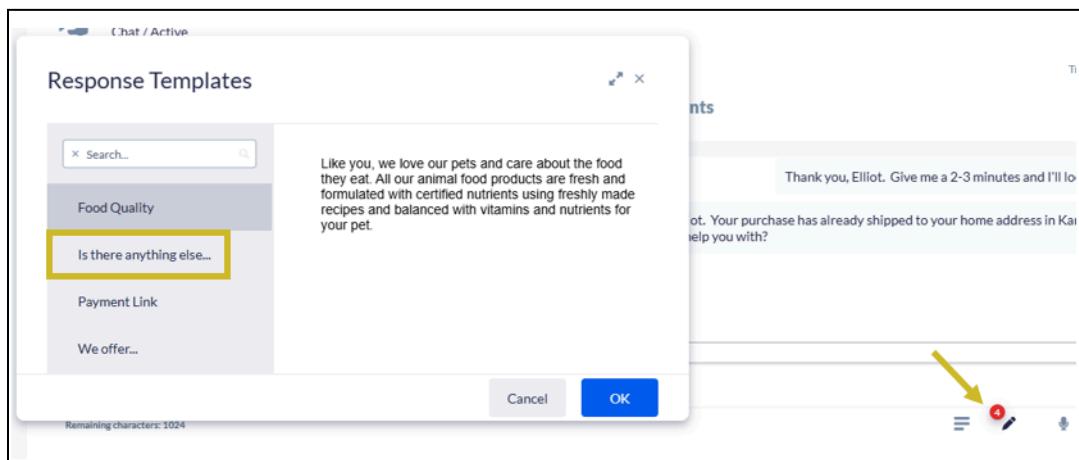
2. Once you have typed your response in the lower window, you can select the **Paper Airplane** button to send the response or select the **Enter** key.



## Response Templates

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 in the chat response library associated with this.

1. To open the Response templates, select the **pencil** icon below the lower window on the right side.

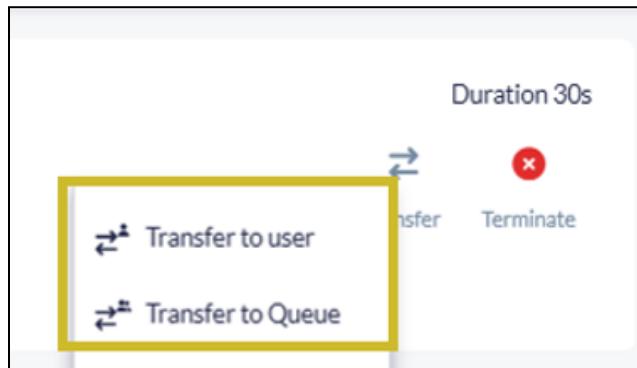


2. Choose the response you want to utilize from the templates.
3. Select **OK** to add the response to your response window.

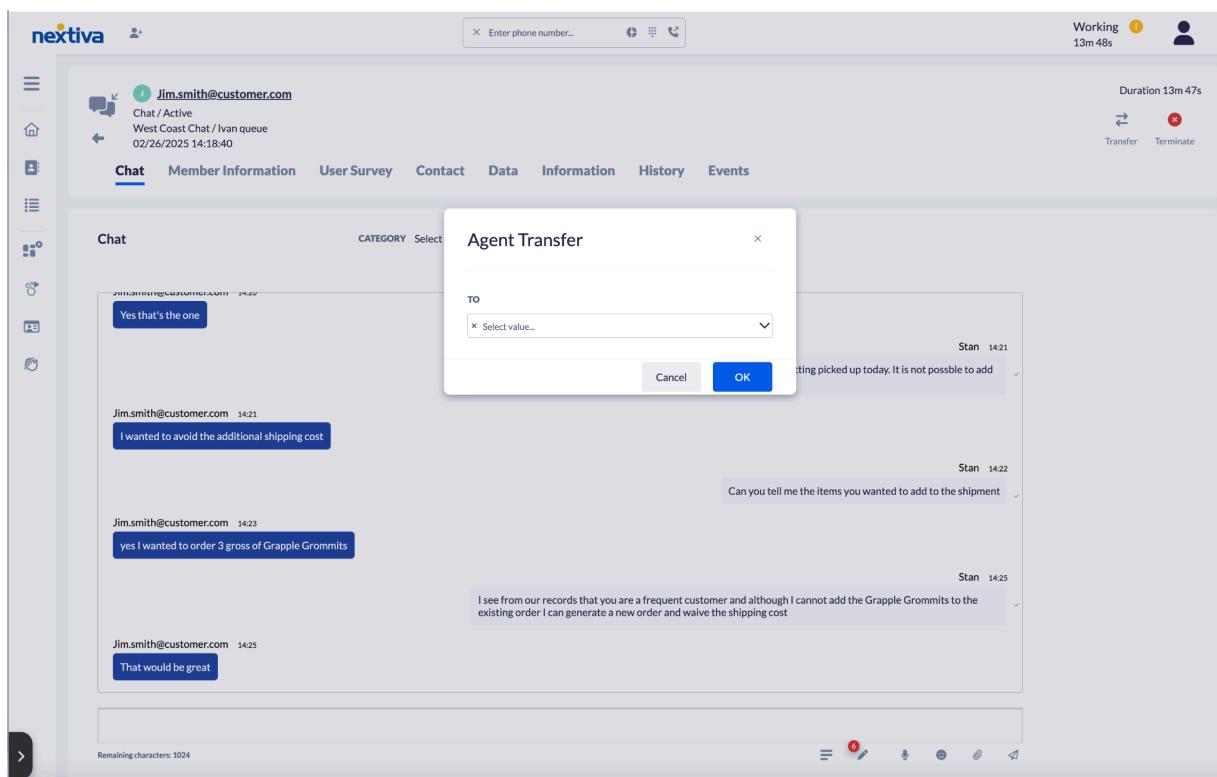
## Transferring a Chat

A user can transfer the chat directly to another user or to a different queue by selecting the transfer icon on the work item.

1. To transfer the chat to another user or queue, select the **Transfer icon** in the top right corner



2. Select the **user or queue**.



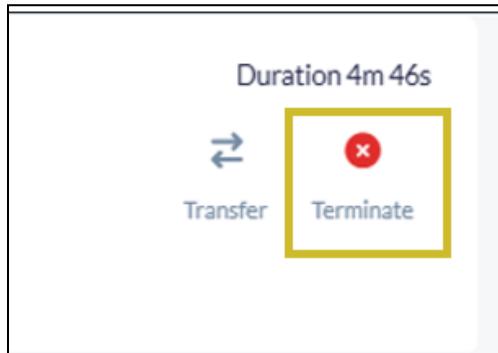
The screenshot shows the Nextiva interface with a 'Chat' window open. The user 'Jim.smith@customer.com' is active in the West Coast Chat / Ivan queue. The agent 'Stan' is currently working, with a duration of 13m 47s. A 'Transfer' dialog box is overlaid on the screen, prompting the user to select a recipient. The main chat window shows a conversation where the user inquired about shipping costs and the agent responded with details about adding items to an order.

The screenshot shows the Nextiva desktop application interface. At the top, there is a search bar with the placeholder "Enter phone number..." and a toolbar with icons for search, filter, and call. The status bar indicates "Working 14m 6s". On the left, a sidebar menu includes "Chat", "Member Information", "User Survey", "Contact", "Data", "Information", "History", and "Events". The main window is titled "Chat" and shows a conversation with a customer named "Jim.smith@customer.com". The customer has sent messages: "Yes that's the one", "I wanted to avoid the additional shipping cost", "yes I wanted to order 3 gross of Grapple Grommets", and "That would be great". The agent, "Stan", has responded: "I see from our records that you are a frequent customer and although I cannot add the Grapple Grommets to the existing order I can generate a new order and waive the shipping cost". A "Queue Transfer" dialog box is open in the center, titled "Queue Transfer". It has a dropdown menu labeled "TO" with the placeholder "Select value...". Below the dropdown are "Cancel" and "OK" buttons. The status bar at the bottom of the interface shows "Remaining characters: 1024".

### 3. Select **OK**.

## Terminating a Chat

1. To terminate a chat, select **Terminate** in the top right corner and select a disposition if enabled.



In some cases, chat summarization and disposition will be included components of the workitem.

2. Once a chat is terminated, select the appropriate disposition from the drop-down and select **OK**.

