NEXTIVA CONTACT CENTER

CHAT USER GUIDE

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

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.

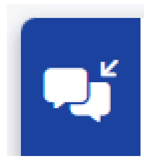
Alternatively, if NextIQ cannot resolve the customer's inquiry or if live assistance is required, the chat will be routed to a live agent. When this happens, the agent will have access to the full conversation history between the customer and NextIQ (if applicable). This ensures a smooth transition and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

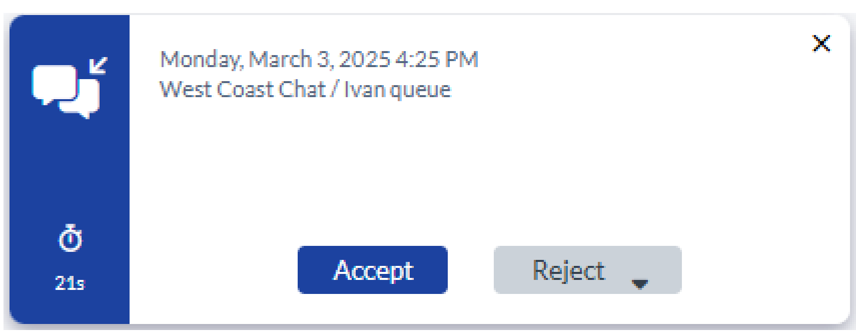


When you are available and an incoming chat is presented to you, the Chat Notification will appear in the lower, right-hand corner of your screen. The pop-up window consists of the following elements:

- 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.

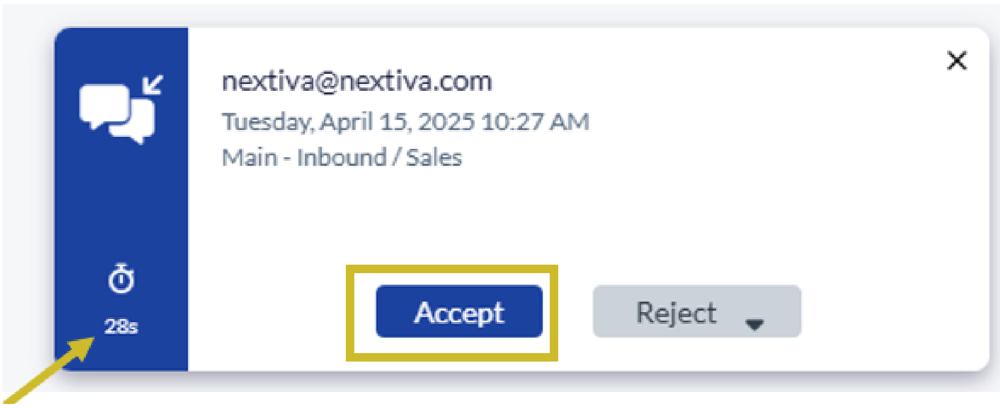
Inbound Chat Offer



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.



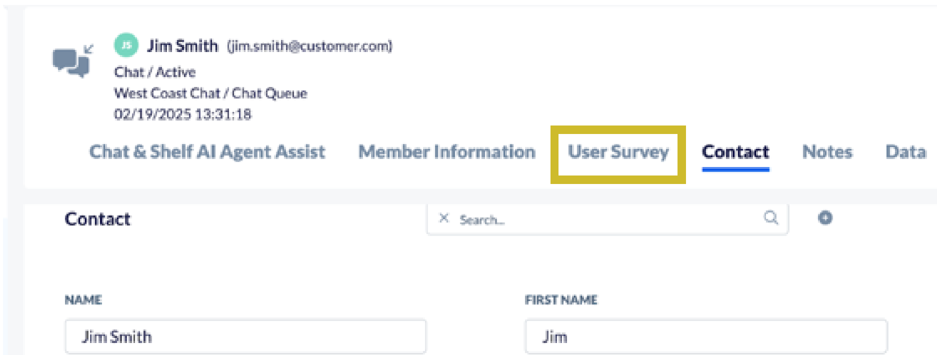
XBert Tips:

- 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.

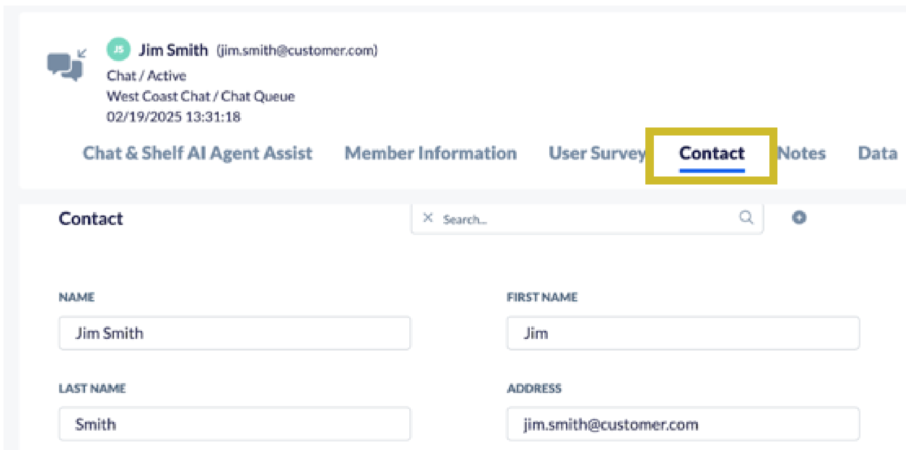


For questions on filling out the user survey please speak to your supervisor or administrator.

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.

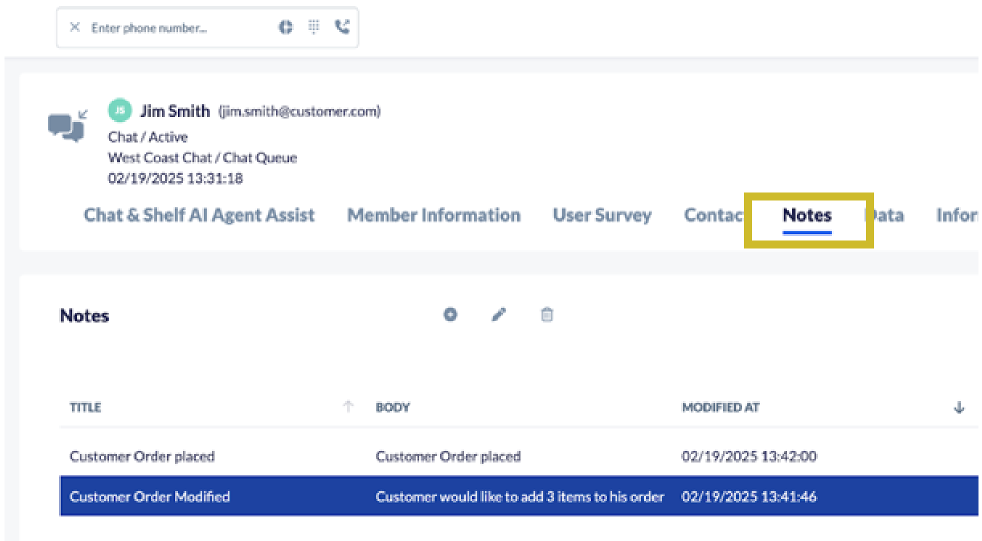


The Contacts tab includes fields for name, address, time zone, coordinates, date of birth, and customer ID numbers or case numbers. Depending on how your system is configured, you may be able to view the same contact information in a native, third-party CRM system that Nextiva is integrated with. The 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.

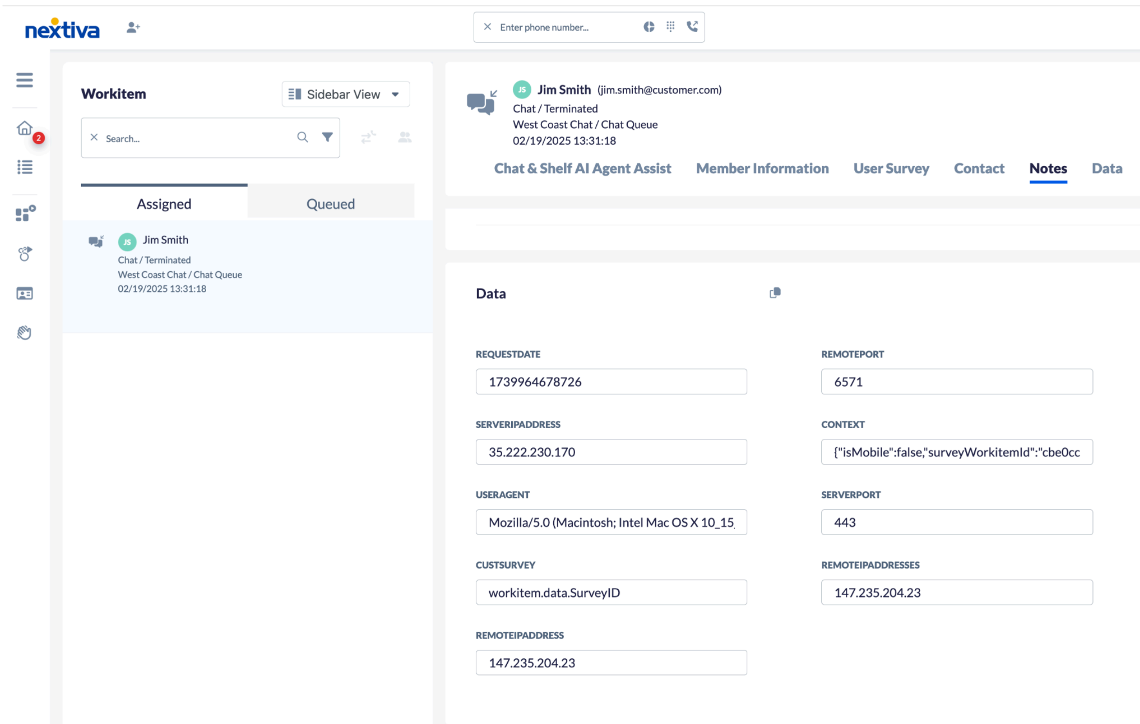


2. Select the note you would like to view.

3. Can we edit or close the notes? What else can they do?

Data Tab

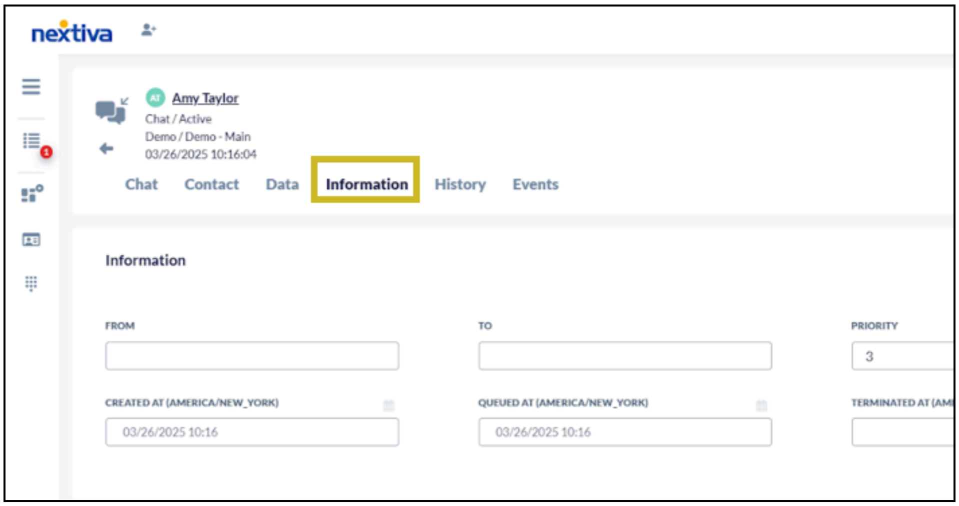
The Data tab stores essential “snapshot” information on the customer including name and file number (if connected to the back-end system).



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.

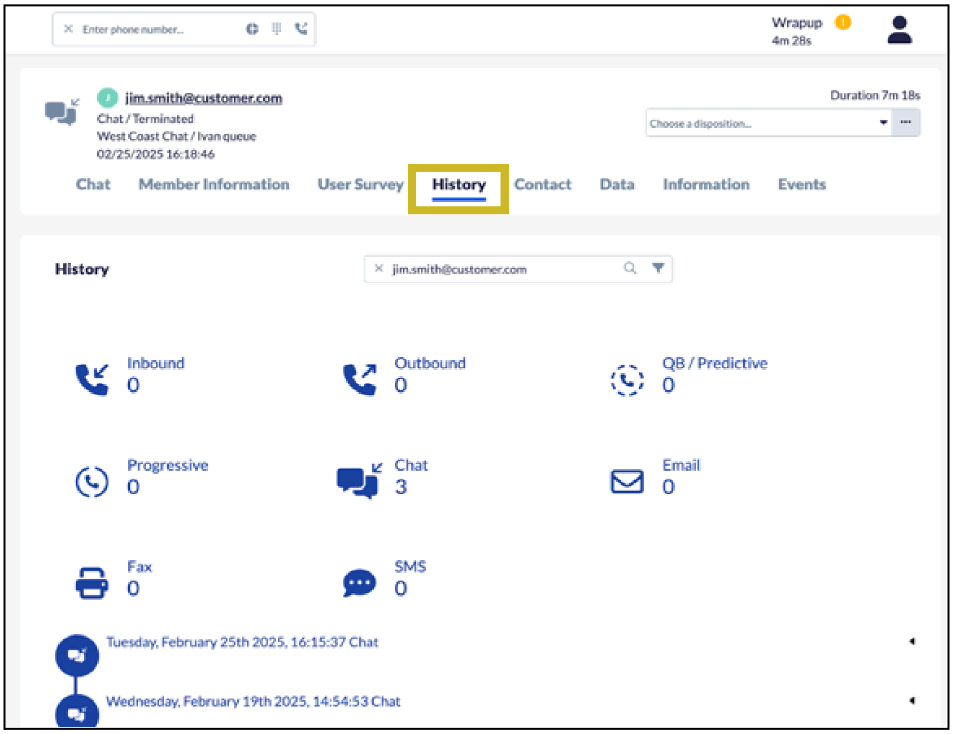
1. While working on a workitem, select the **Information** tab.



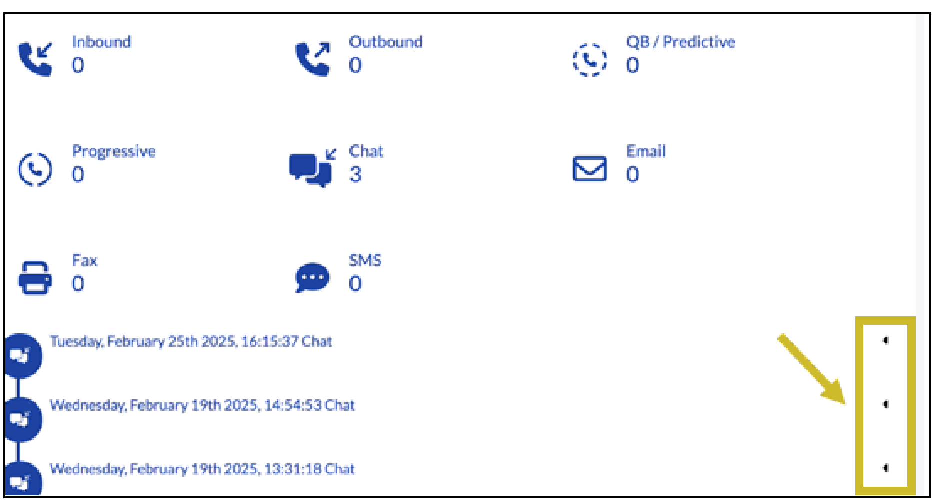
History Tab

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

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



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

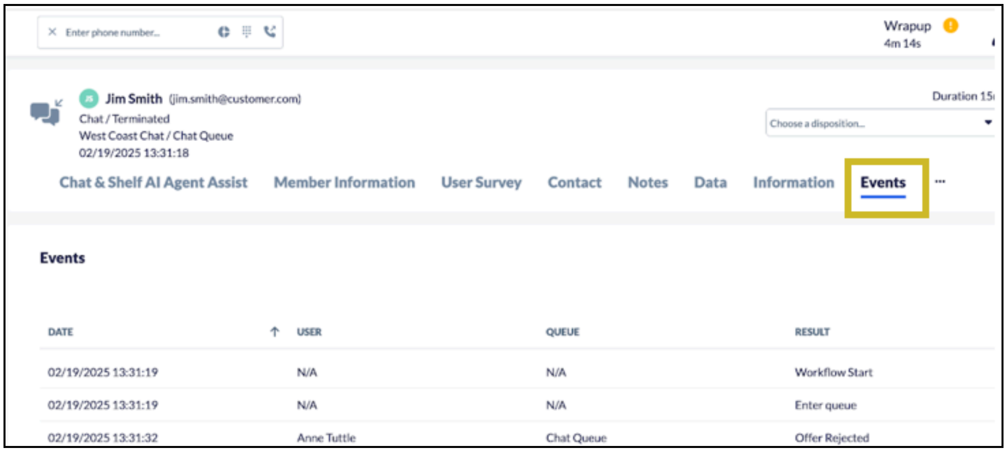


3. More detail will open according to the arrow selected.

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.



Selection of Timeline Events

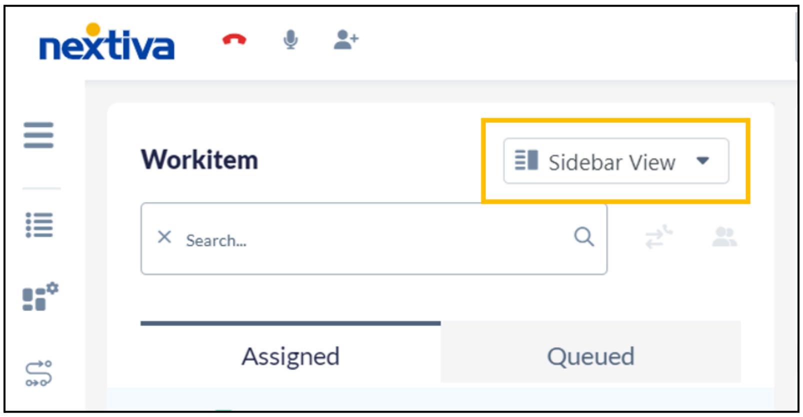
By clicking the “down arrow” icon associated with a particular timeline item, the item detail will expand to include more information.

Active Chat Workitems

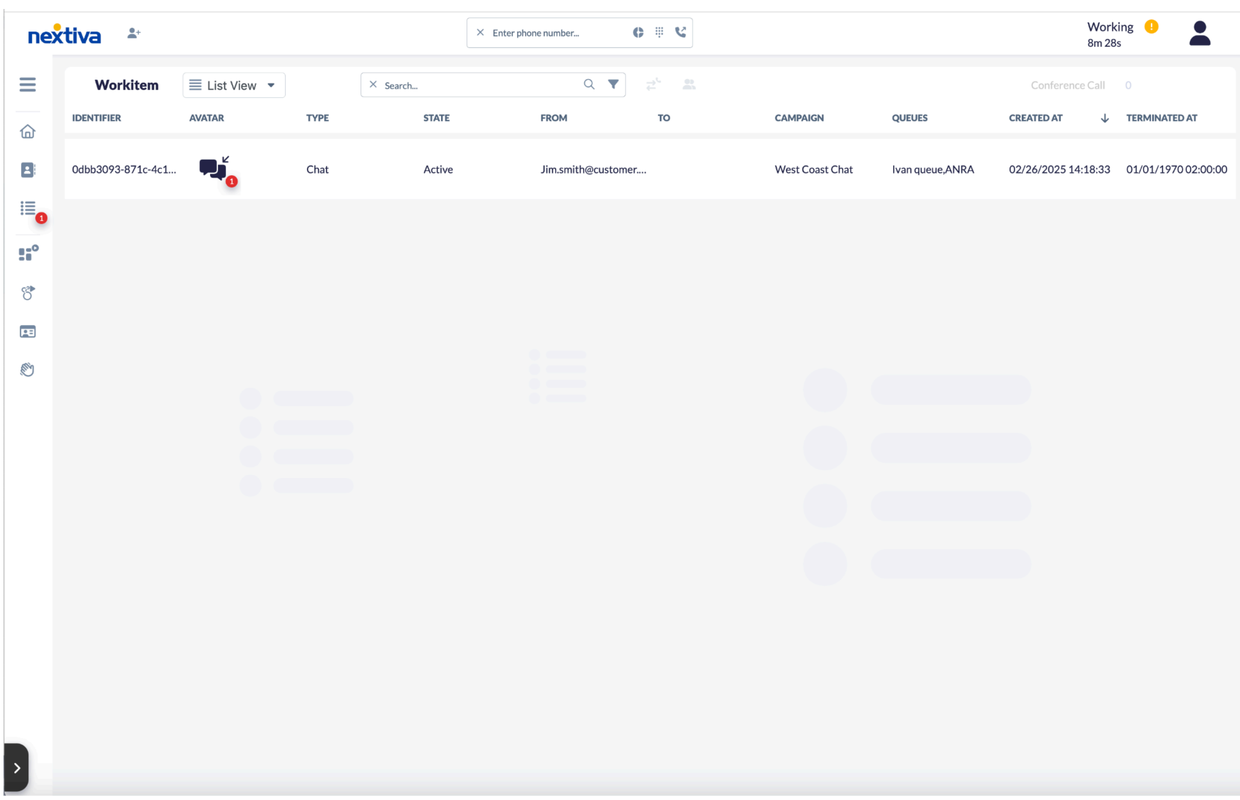
Views

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

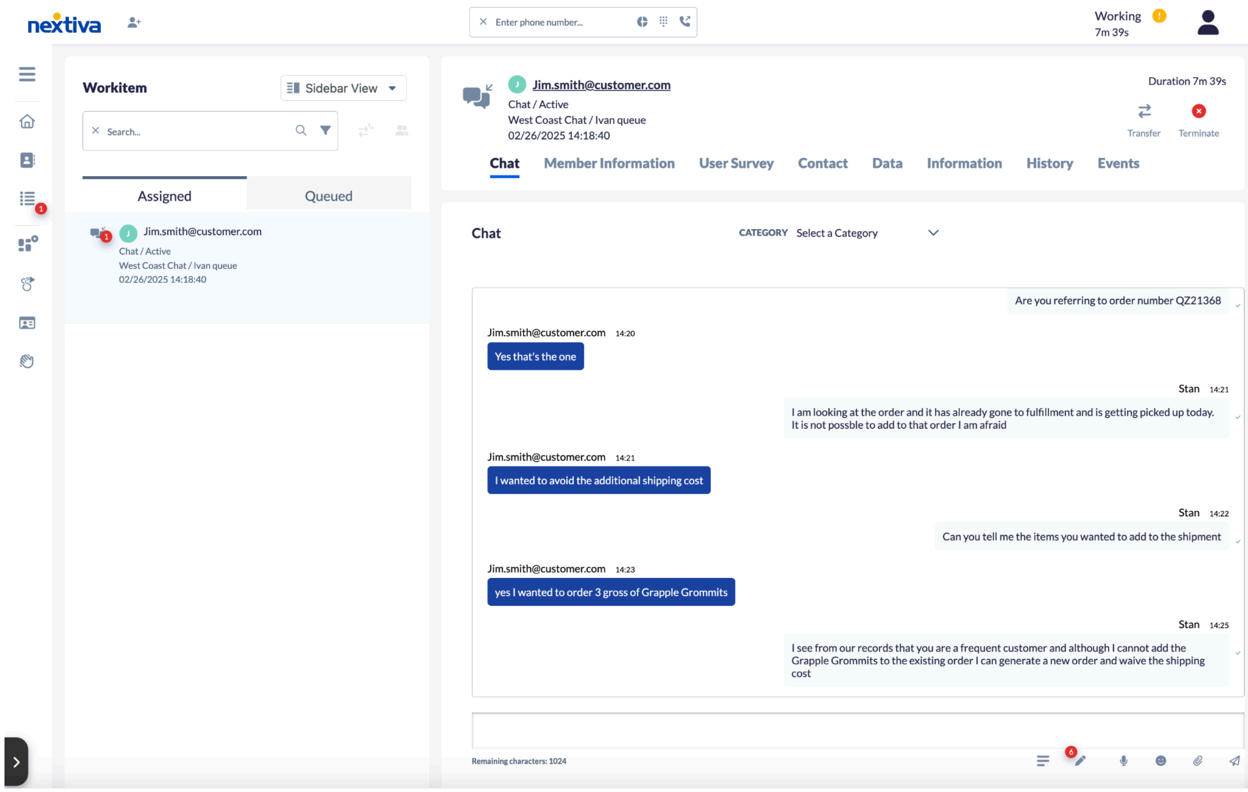
1. From your Workitem page, select the dropdown from the top left to change the view.



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

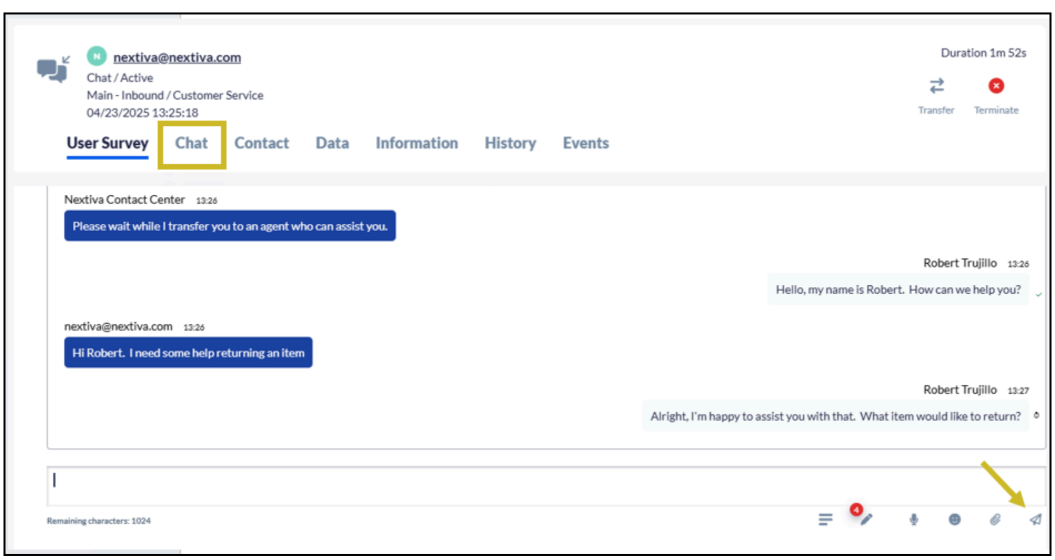


This is what an active chat workitem looks in **detail view.**



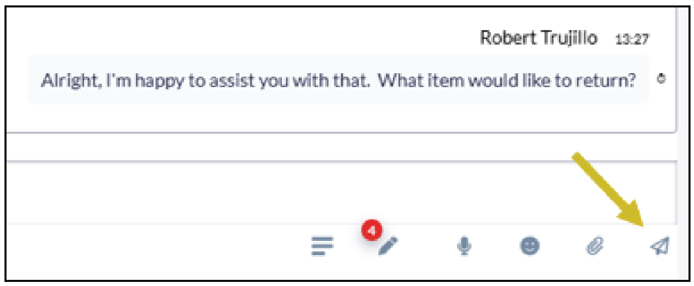
Chat View

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



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.

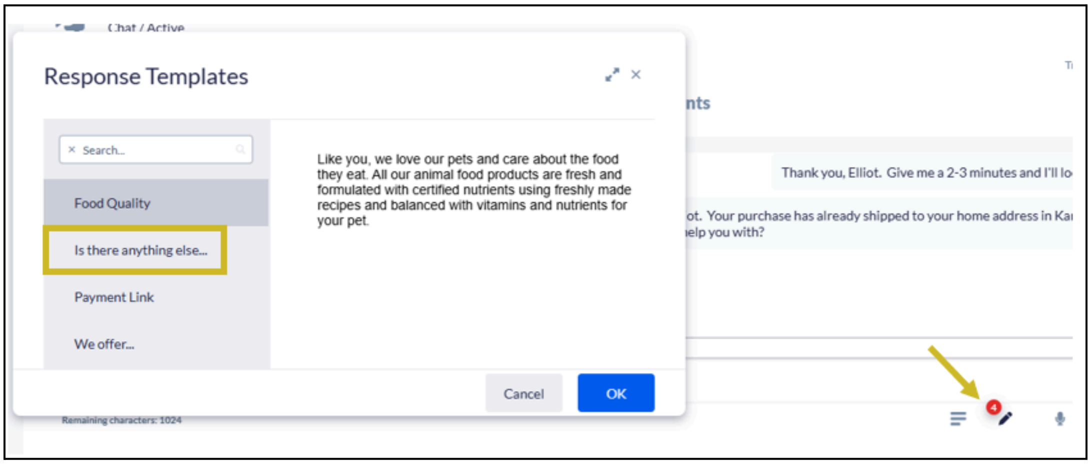
2. Once you have typed your response in the lower window, you can select the **Paper Airplane** button to send the response or select the **Enter** key.



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.

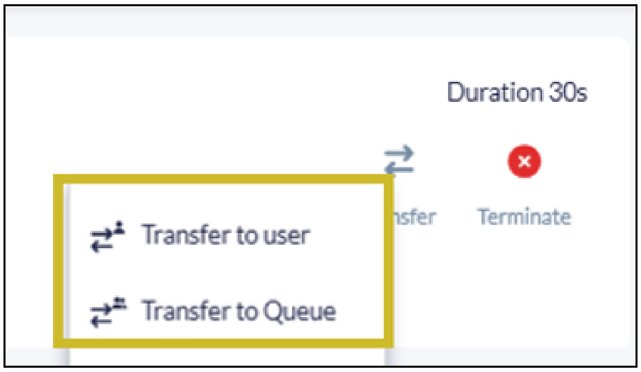


2. Choose the response you want to utilize from the templates.
3. Select **OK** to add the response to your response window.

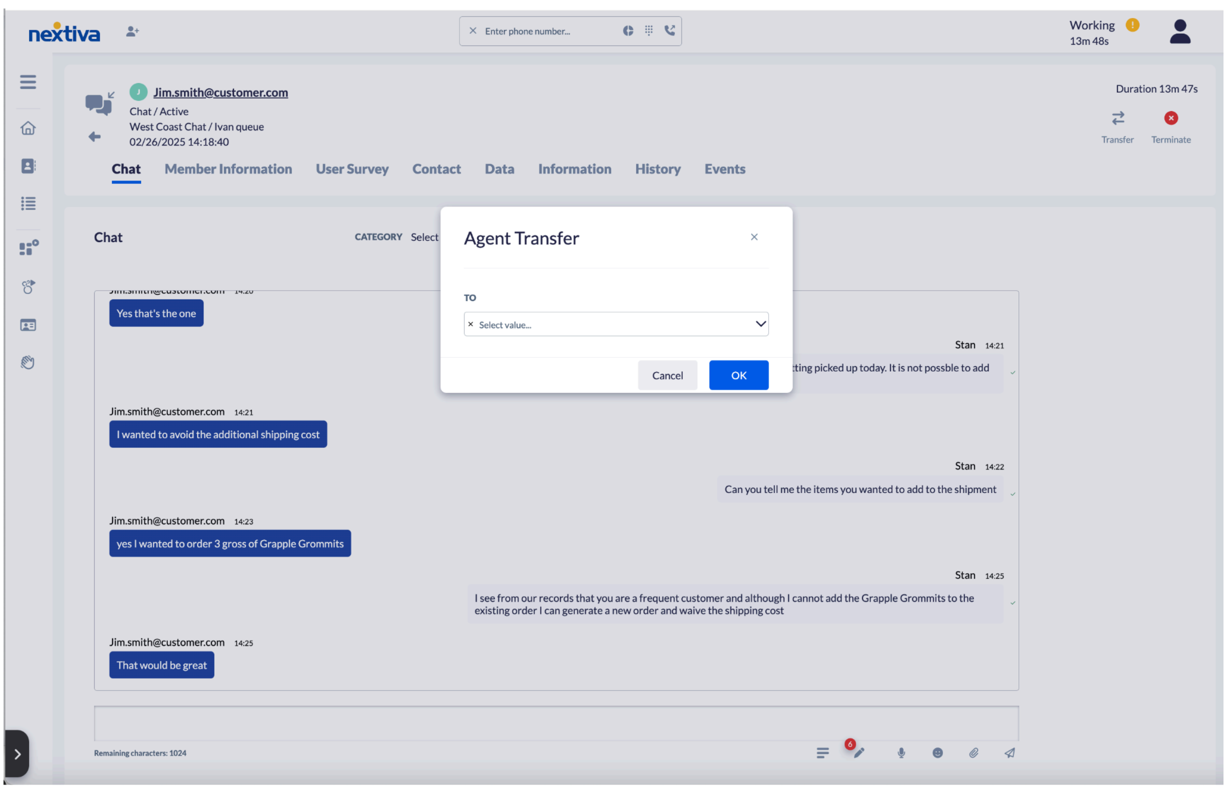
Transferring a Chat

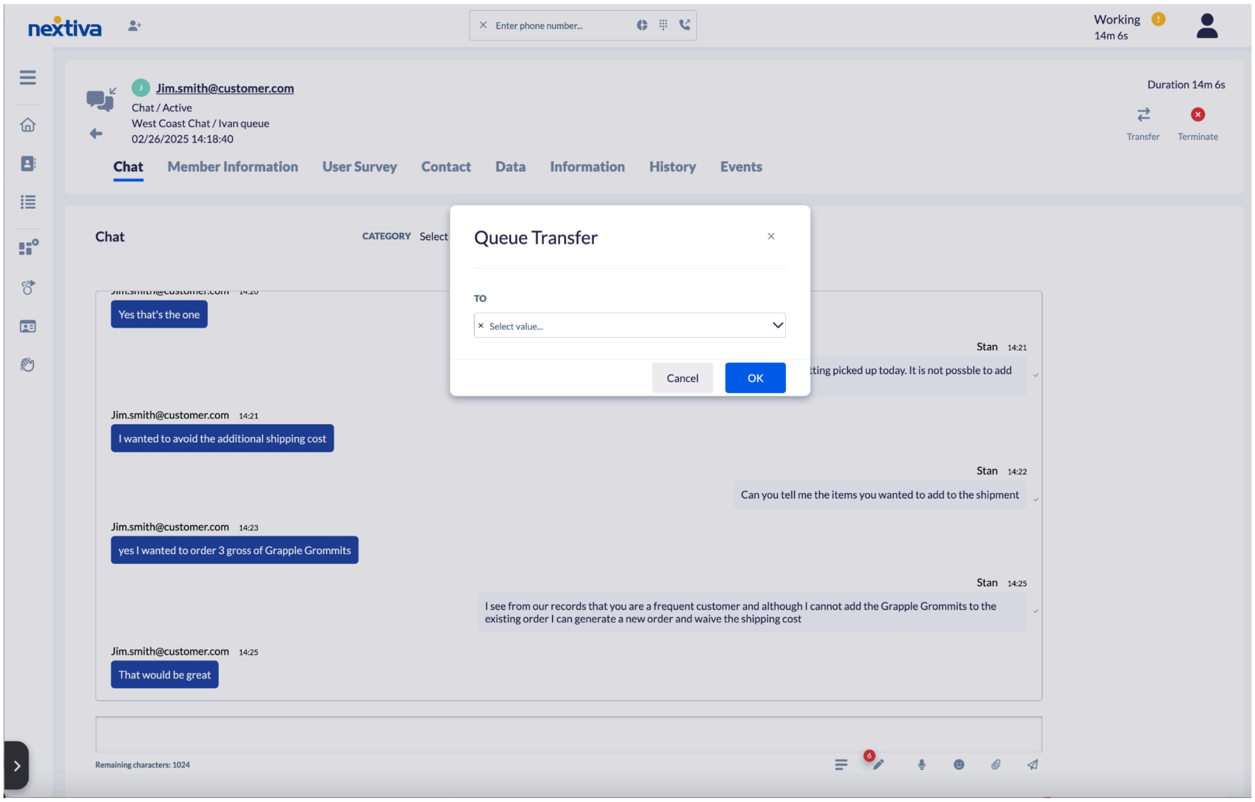
A user can transfer the chat directly to another user or to a different queue by selecting the transfer icon on the work item.

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**.

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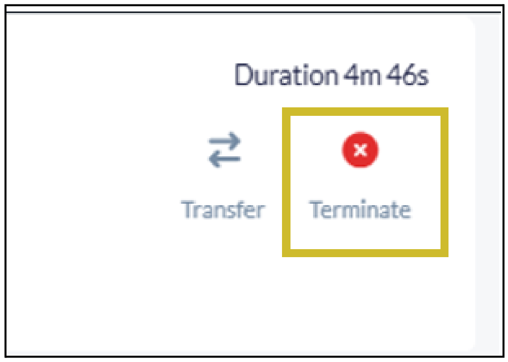
Enter phone number...
Working
14m 6s
Jim.smith@customer.com
Chat / Active
West Coast Chat / Ivan queue
02/26/2025 14:18:40
Duration 14m 6s
Transfer
Terminate
Chat
Member Information
User Survey
Contact
Data
Information
History
Events
Chat
CATEGORY
Select
Queue Transfer
TO
Select value...
Cancel
OK
Yes that's the one
Stan 14:21
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 Grommits
Stan 14:25
I see from our records that you are a frequent customer and although I cannot add the Grapple Grommits to the existing order I can generate a new order and waive the shipping cost
Jim.smith@customer.com 14:25
That would be great
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**.