NEXTIVA CONTACT CENTER

EMAIL USER GUIDE

CX TRAINING TEAM
VERSION 2.01

nextiva

Welcome to the comprehensive guide for Nextiva Contact Center (NCC) email features, designed to enhance your customer service experience via email. This detailed resource is tailored for agents using the email-only Contact Center product type, providing them with the tools and insights needed to deliver exceptional service through email. Whether you're handling customer inquiries, resolving issues, or simply ensuring seamless communication, this guide will walk you through the essential features and functionalities of NCC's email capabilities.

Use this guide to:

- **Streamline email Interactions:** Learn how to efficiently manage customer conversations via email.
- **Improve Response Times:** Discover how to quickly address customer inquiries and resolve issues.
- **Enhance Customer Experience:** Understand how to leverage NCC's email features to provide personalized and effective customer service.
- **Optimize email Workflows:** Explore ways to integrate email into your broader customer service strategy for maximum impact.

If you have access to Nextiva's omnichannel or voice features as part of your setup, you may also find our additional guides for these services useful. Utilize the Nextiva Contact Center Resource Hub to enhance your customer service offerings and ensure a seamless experience across all channels.

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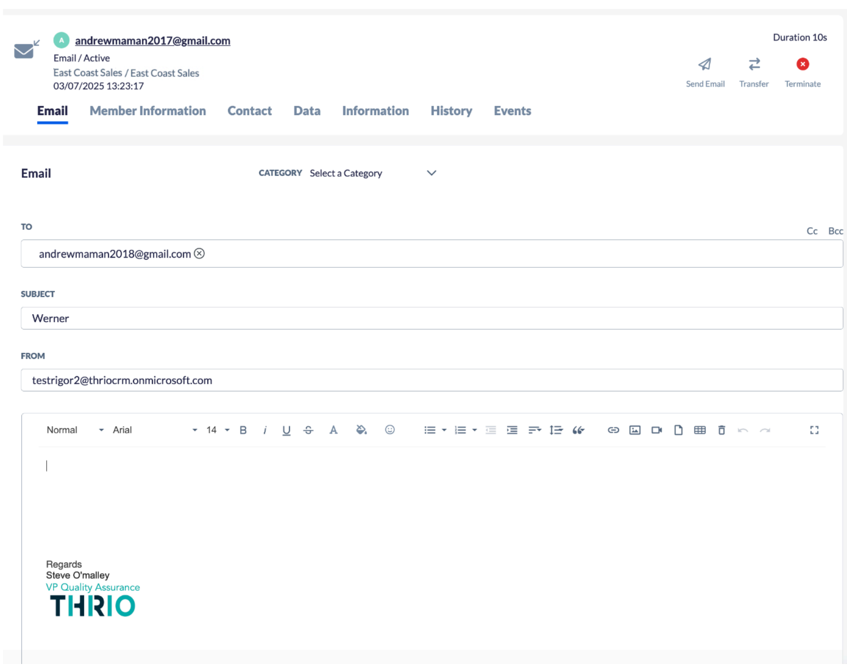
Email Workitems

With the Nextiva system customers have a choice of channel preferences. The Nextiva system also handles incoming emails that are queued and routed by the built-in ACD. The incoming email can receive special treatment by the system including automated email acknowledgment, agent scripts, and suggested email templates. All of this is made possible by Nextiva's built-in workflow engine. As a user you will be presented the scripts and the email response templates once you accept the ACD email offer. This is the icon for Email Workitems:

Incoming Email Workitems

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 as well as 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 not recommended that you change any of these fields unless of course you would like to CC or BCC someone on this email.



If you receive an inbound email with attachments, you can select which of the attachments to attach/include in the reply of the email.

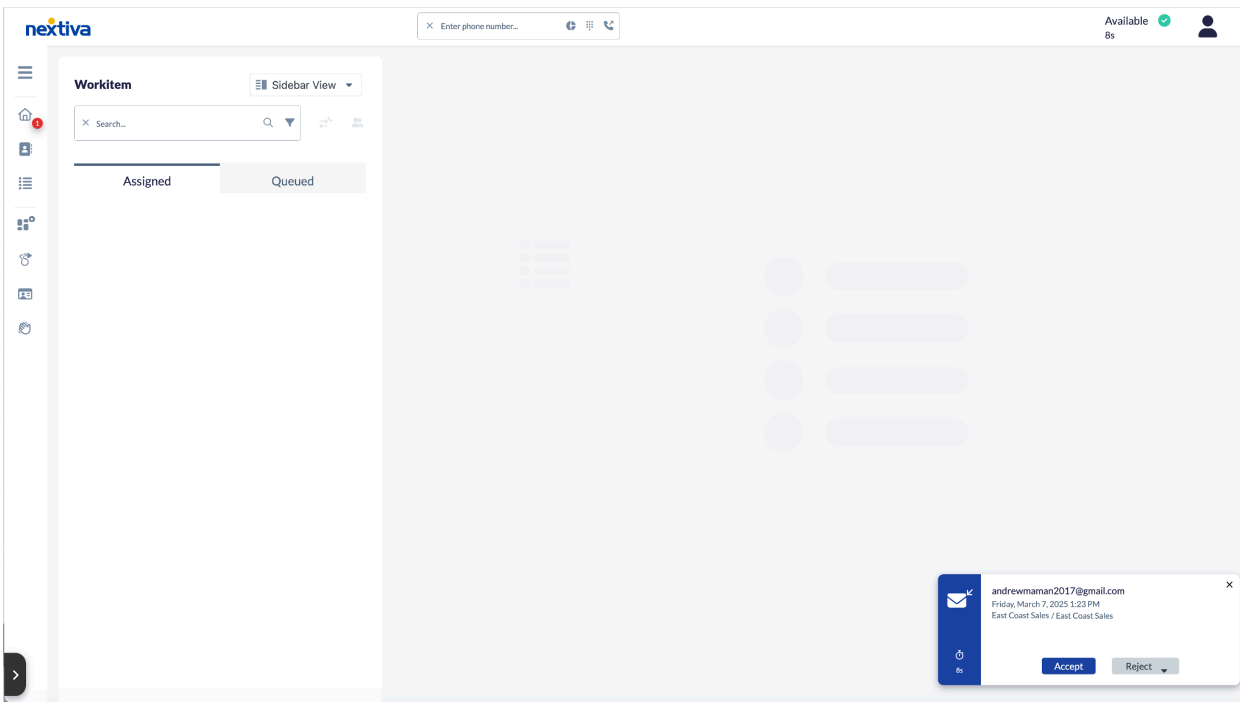
Once you accept

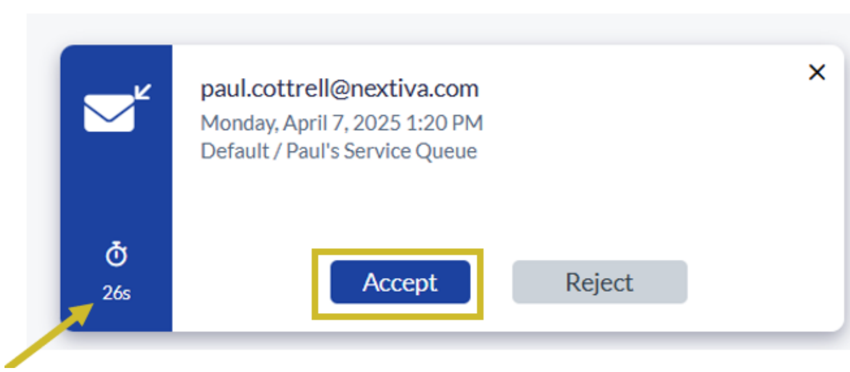
Incoming Email from the ACD Queue

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

What you will see is:

- Title: Displays the contact's name, or their phone/email depending on the work item type.
- Details: Includes creation date, campaign name, and queue name.
- Actions: Shows Accept (to take the work item) or Reject (to return it to the queue). A dropdown lets you choose a different busy status when rejecting.



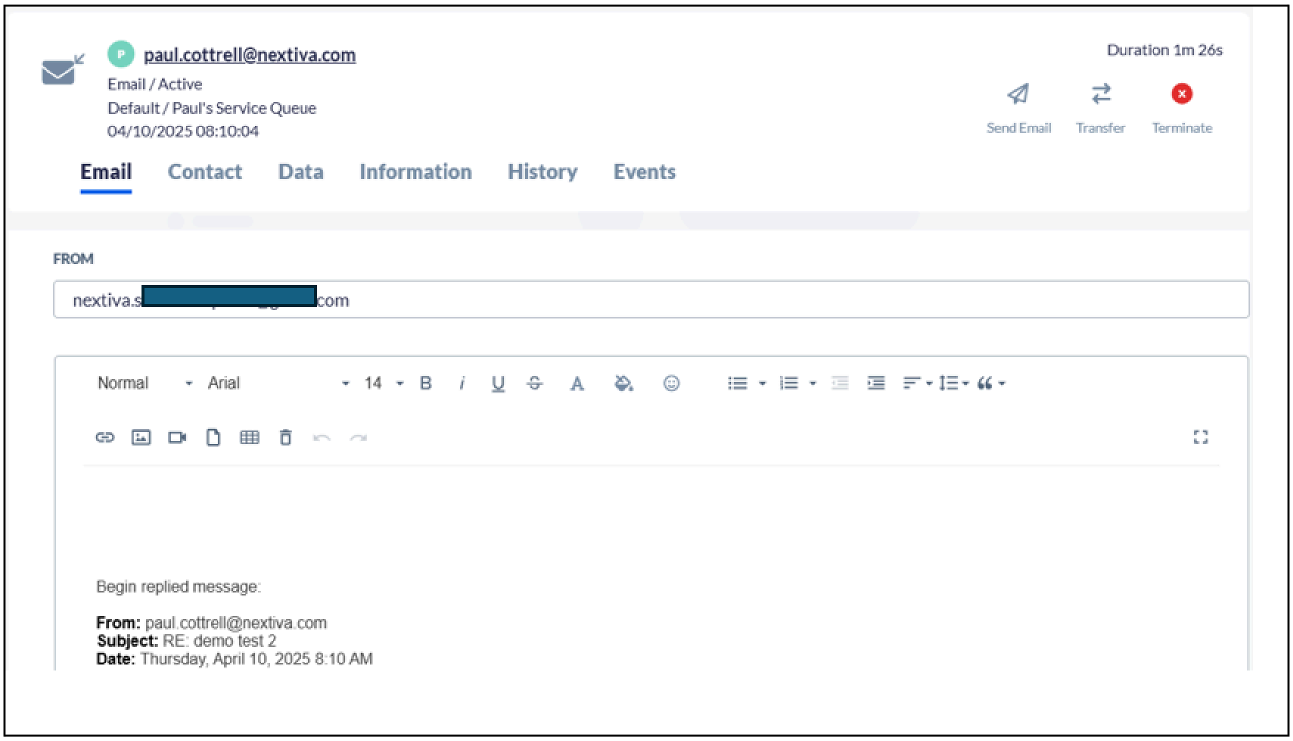


- To answer an incoming email, select the **Accept button** in the pop-up window that shows up when receiving a workitem.

XBert Tip: The workitem will have a timer indicating your workitem needs to be accepted before the timer runs out.

Open a Workitem

1. To open a workitem, select the workitem from your list. This allows you to view details in the Detailed View.
2. Write your reply in the body field.
3. Select the **Send Email** button in the top right corner.



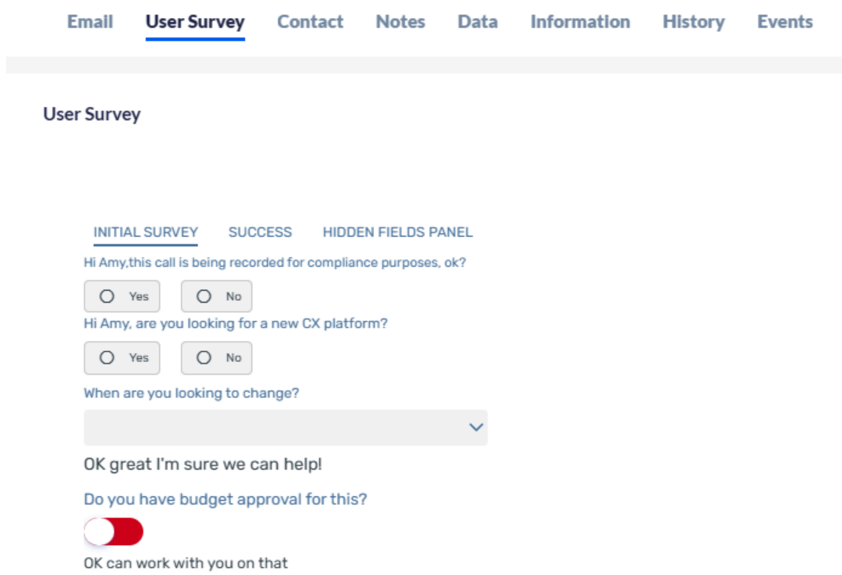
Survey

After accepting an email 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.

To access the User Survey tab on an active email workitem:

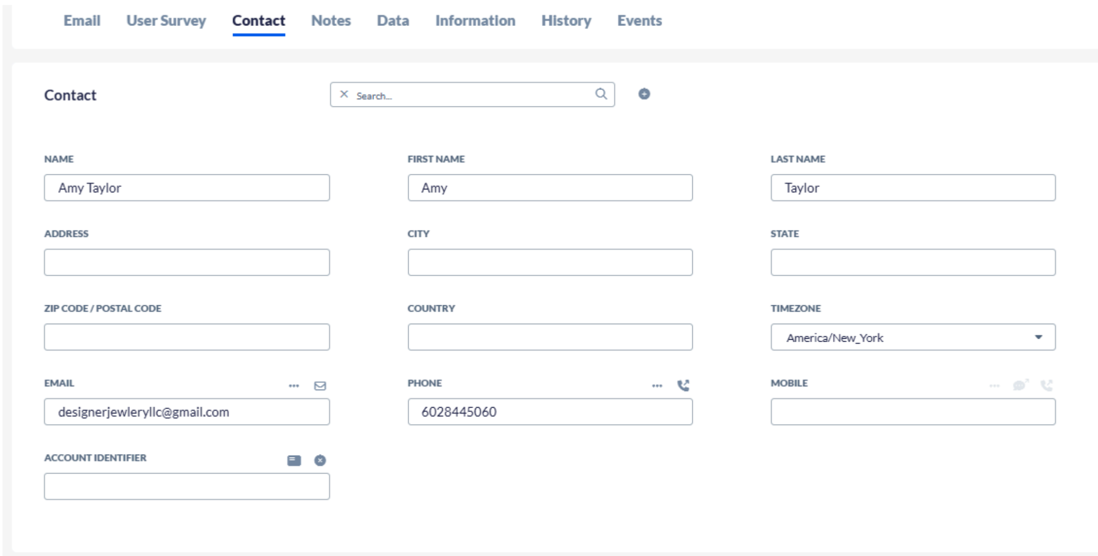
1. Select **User Survey** in the workitem banner.

2. The User Survey tab will be visible:



Contact Tab

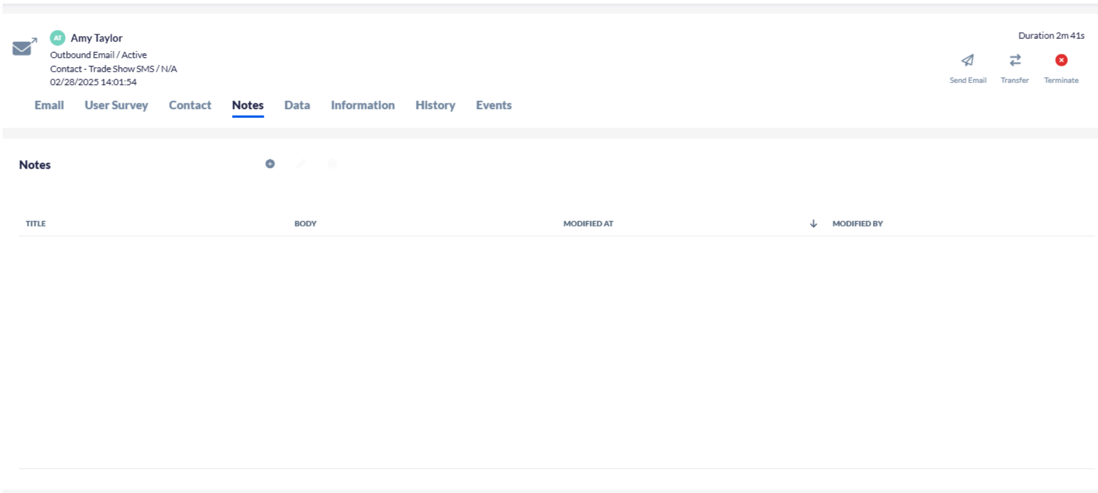
After accepting an email workitem, you can select the Contact tab to reveal the Mini CRM screen. Here you can add or edit information about the customer.



- The contact screen provides you with the ability to get a quick look at essential customer information.
- This includes fields:
    - name,
    - address,
    - email address,
    - time zone,
    - coordinates,
    - date of birth,
    - customer ID numbers
    - 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 you with a shortcut to that section. You can also scroll down to the section you have selected.

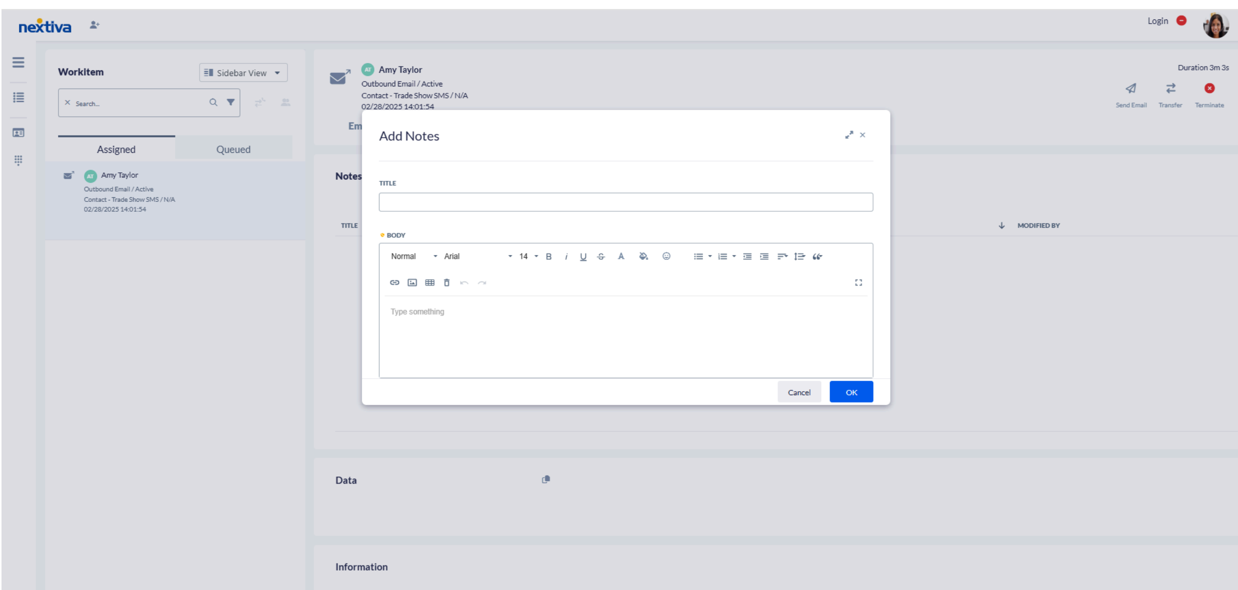
Notes Tab

After accepting a workitem, you can select the Notes tab 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.



To add a note:

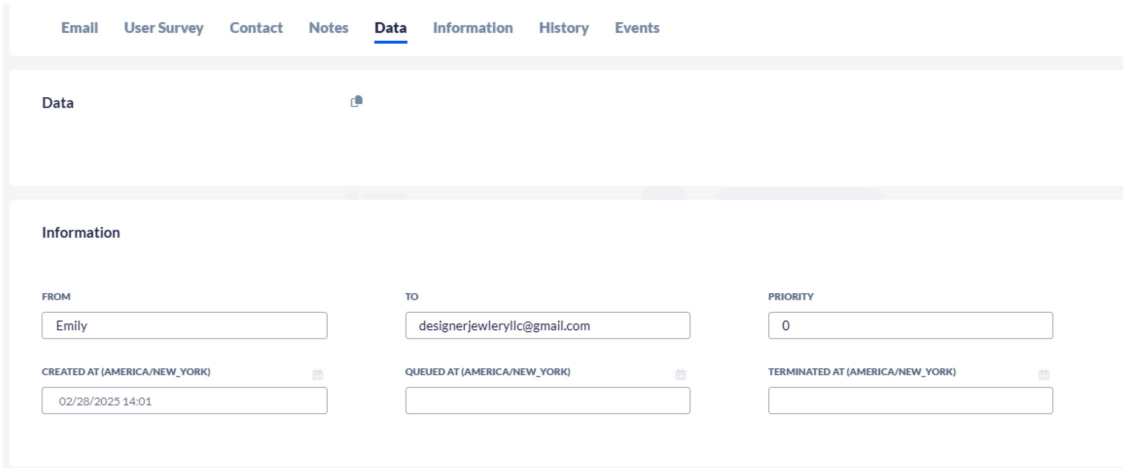
1. Select the **+** sign.
2. A pop-up window will appear.



3. Enter the title of the note in the **Title** field and the note in the **Body** text field
4. Select **OK**.

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.

1. Start by searching for the contact or workitem using the search bar.

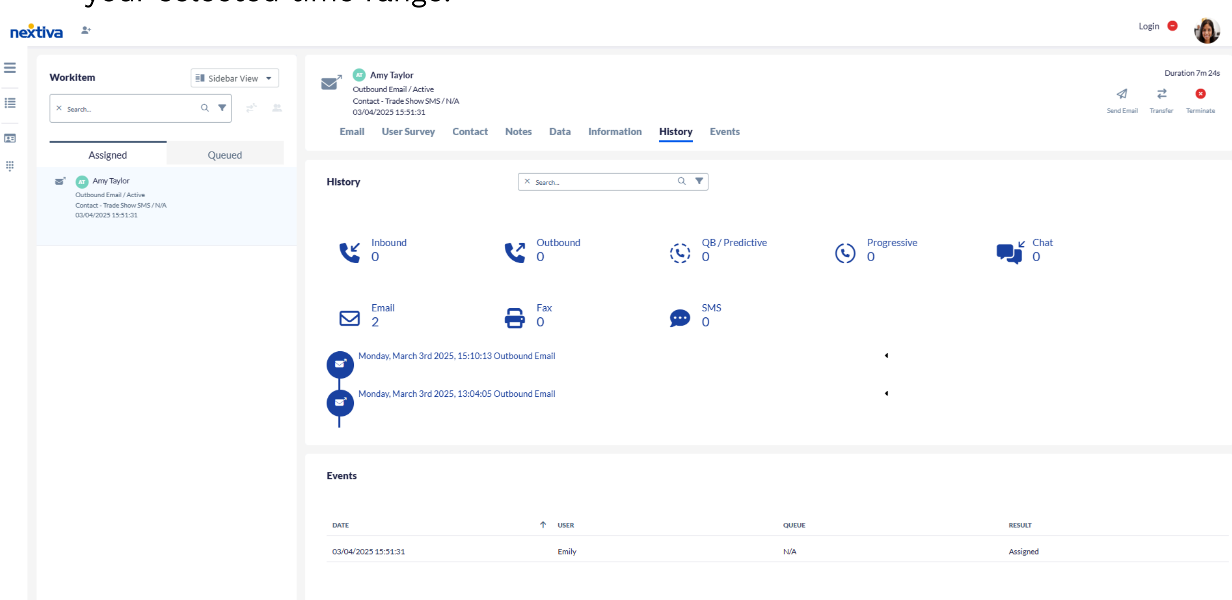
2. Locate the Arrows On the right-hand side of the screen, you'll see arrows next to each result.

3. Select the arrow next to a stored workitem to reveal more detailed information.

4. Once a workitem is active, its interaction history will appear on the right-hand side of your workspace.

5. At the top of the history section, select the drop-down icon to select how far back you want to view past interactions.

6. The system will display a timeline of interactions with the contact, filtered by your selected time range.

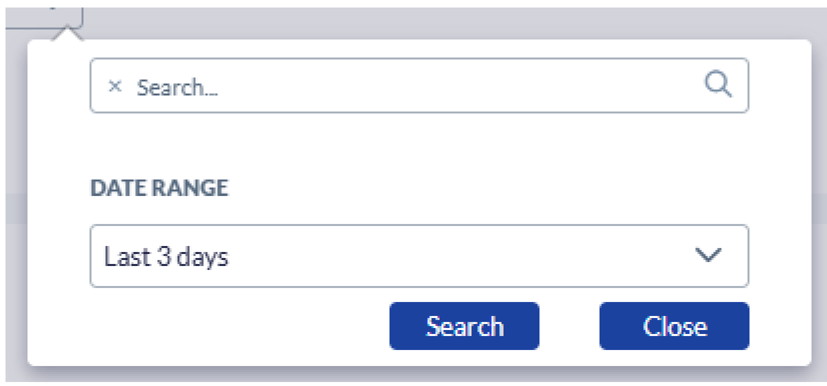


Selection of Timeline Items

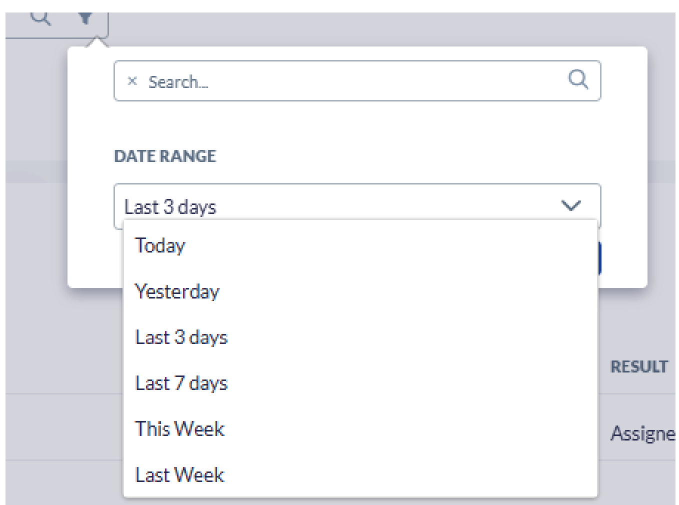
1. Navigate to the **History** tab.

2. Select the magnifying glass icon in the Search field.

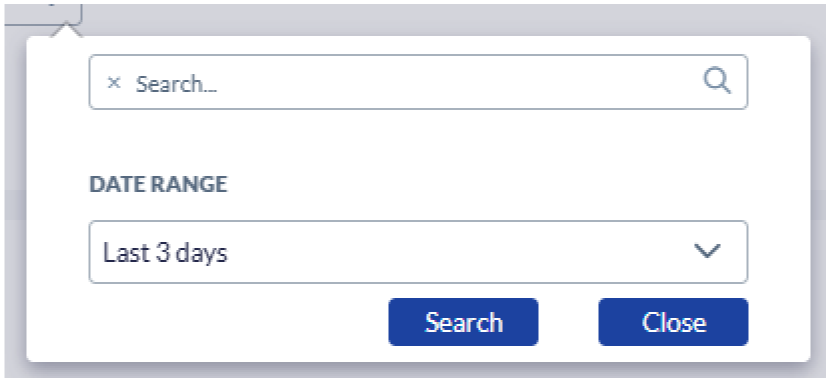
   a. Or Select the Filter icon. A pop-up window will appear.



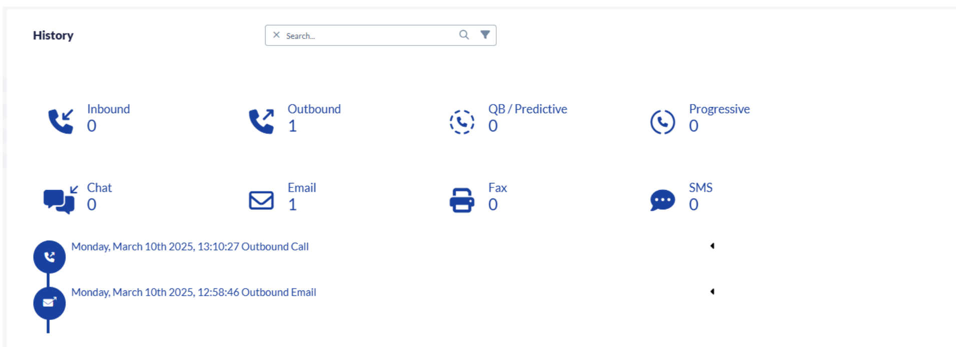
   b. You can manually search for a workitem and/or specify a date range in the **Date Range** field.



   c. Select **Search**.

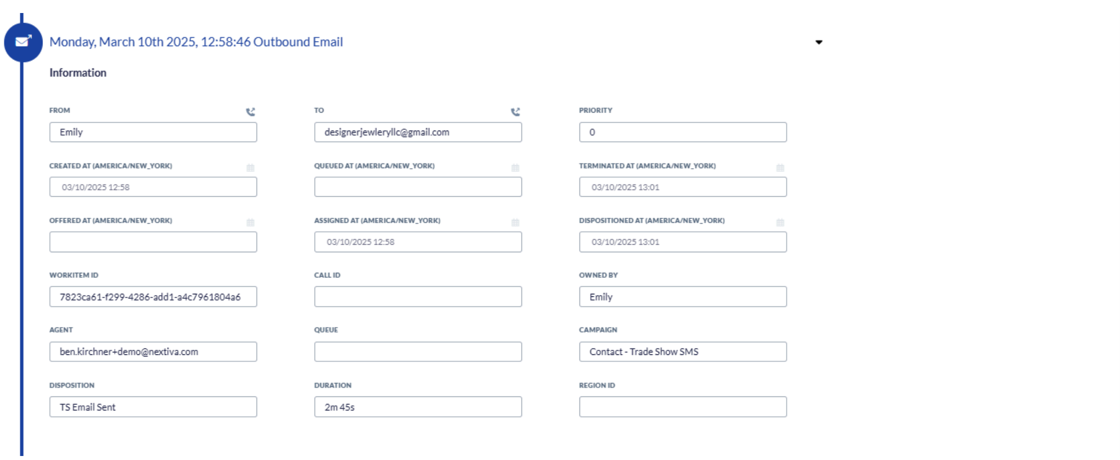


3. You will see a history of workitems with the person contacted in the email. You will see workitems by type and a timeline.



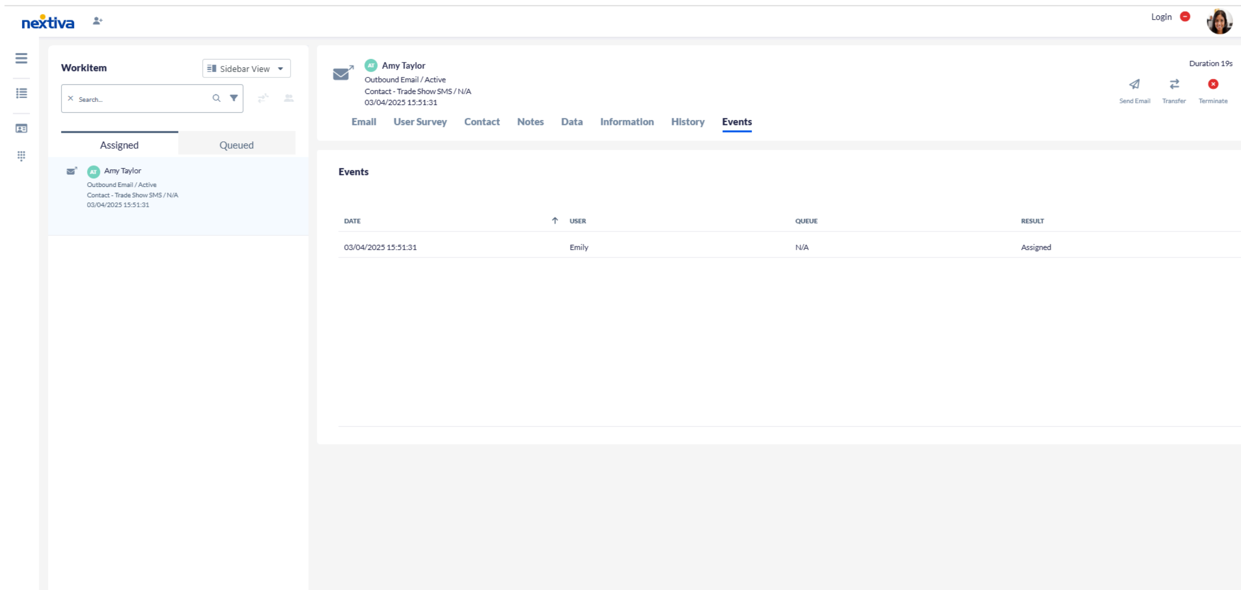
4. Select the black arrow next to an individual workitem in the timeline.

5. More details about the workitem will appear.



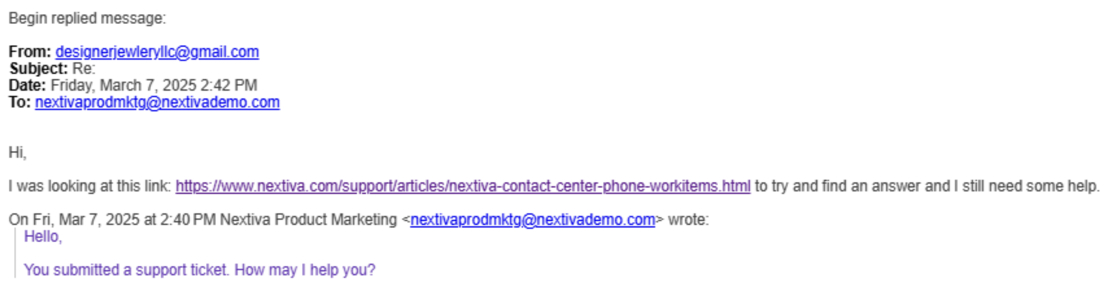
Events Tab

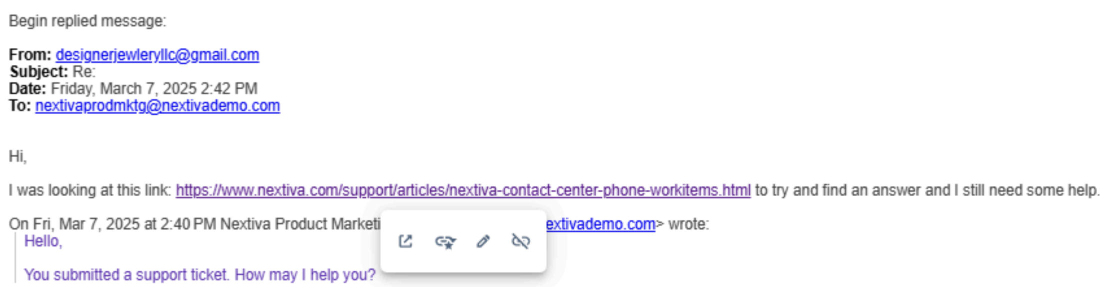
The Events tab provides information on workitems associated with the active work item. For example, routing result and duration.



Selecting on Links in an Email

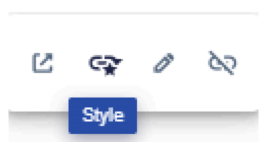
An agent cannot directly select on a link, when the agent selects on a link there will be a pop-up window with options.





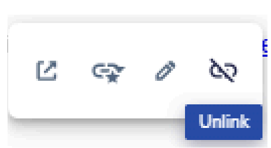
The first option is called Open Link which opens the link in a new tab.

The second one is Style



The third one is Edit Link.

The fourth is Unlink.

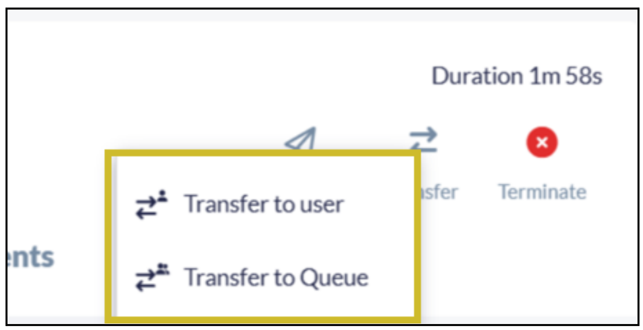


Transferring an Email

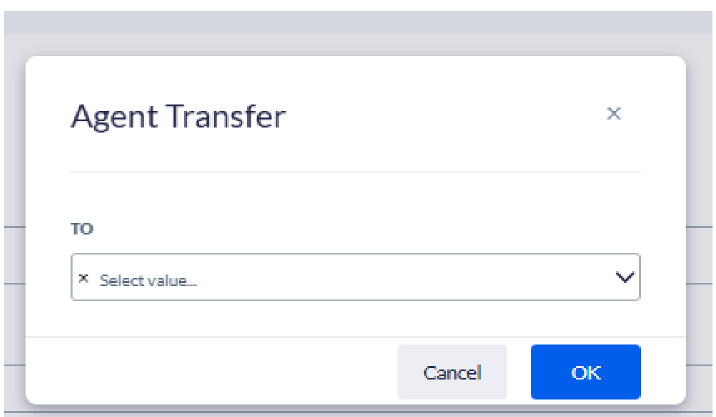
If an email workitem needs to be moved to a new extension or queue, you can use the Transfer feature to redirect it to that new location. (For email workitems, all transfers are considered “blind”).

1. To transfer an email, first select **Transfer** in your active workitem.

2. In the drop down menu that appears, select the relevant option



3. Choose **Transfer to User** to send directly the workitem to another agent.



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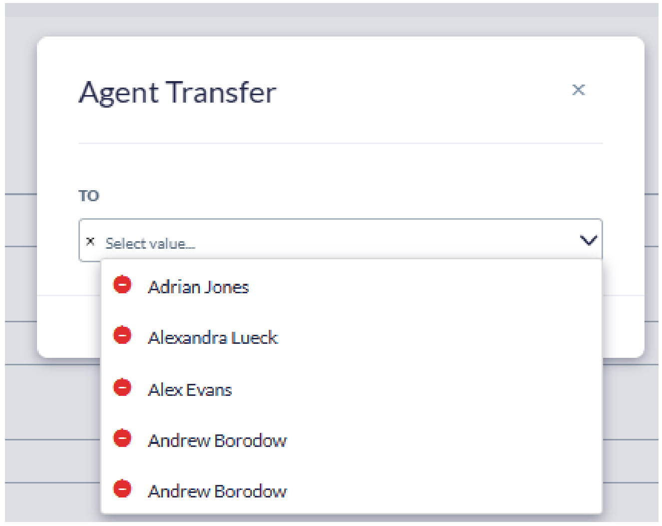
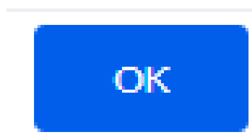
- Select the drop-down arrow to pick the user to transfer the email to.



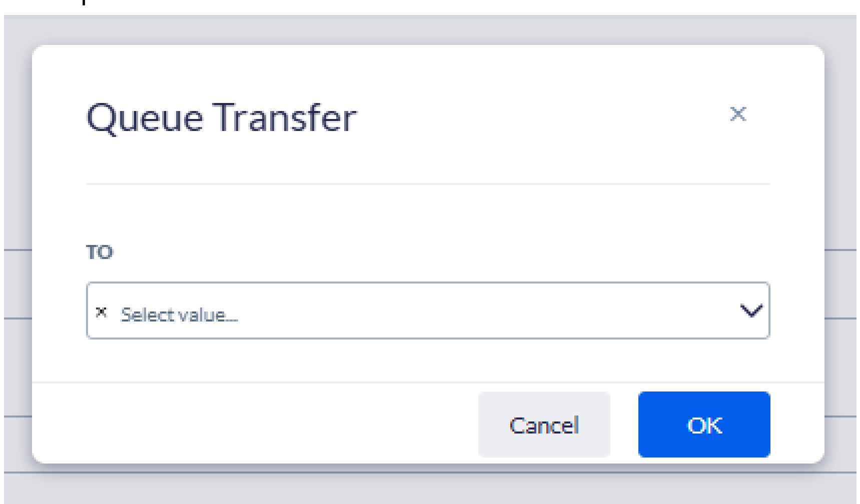
- Select **OK**.



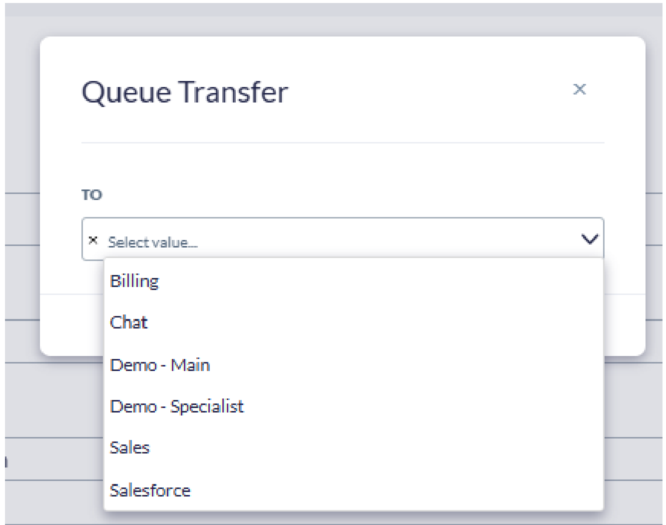
XBert Tip: If you select Transfer to User, another menu will appear where you can select the user's name.

Choose **Transfer to Queue** to send the email into a queue to follow its routing rules to the next Available agent

- Transfer to queue



- Select the drop-down arrow to pick the to transfer the email to.

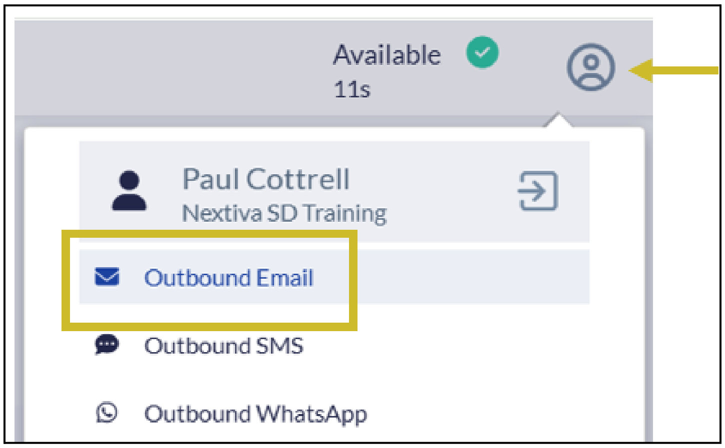


- Select **OK**.

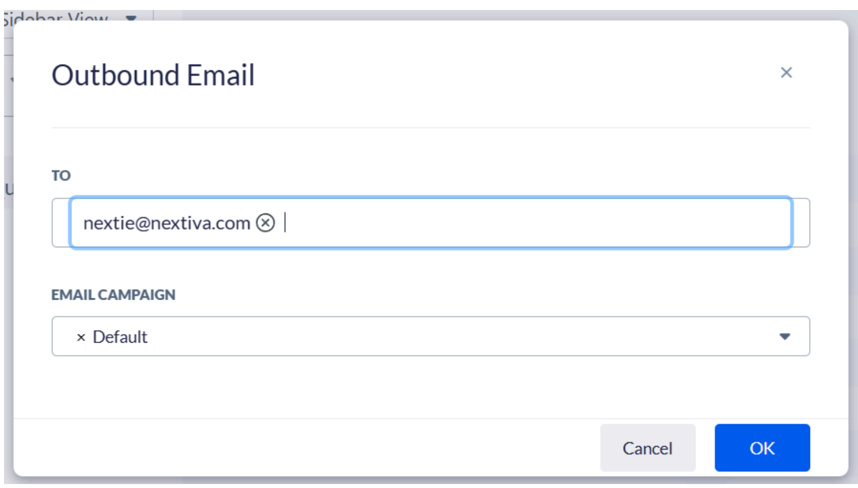
Outbound Emails

Sending an Outbound Email

To begin sending emails, open the **Avatar menu** and select **Outbound Email**



From the pop-up window, type in the recipient's email address and choose the appropriate email campaign address.



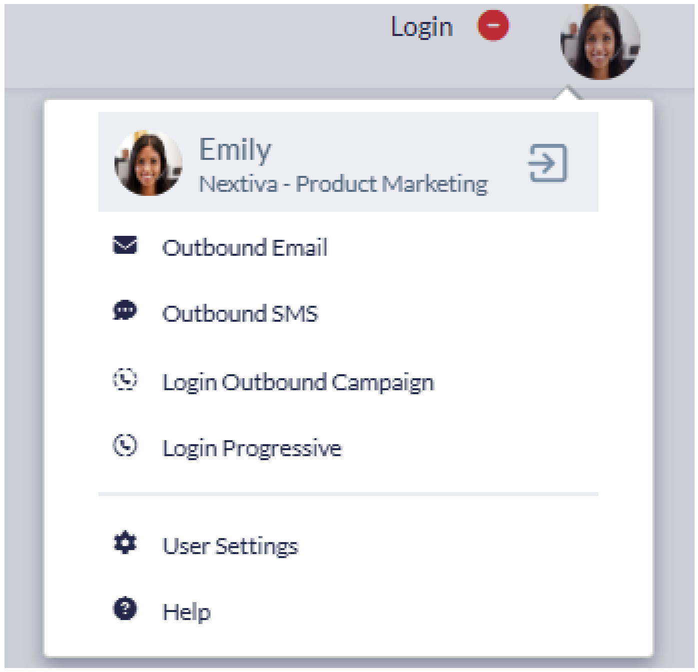
Select the **OK** button to open the email as a workitem and continue.

XBert Tip: Once you've typed in the recipient email address, you **MUST SELECT THE ENTER KEY** for the address to save in the **To** field.

Sending Outbound Emails from the User Menu

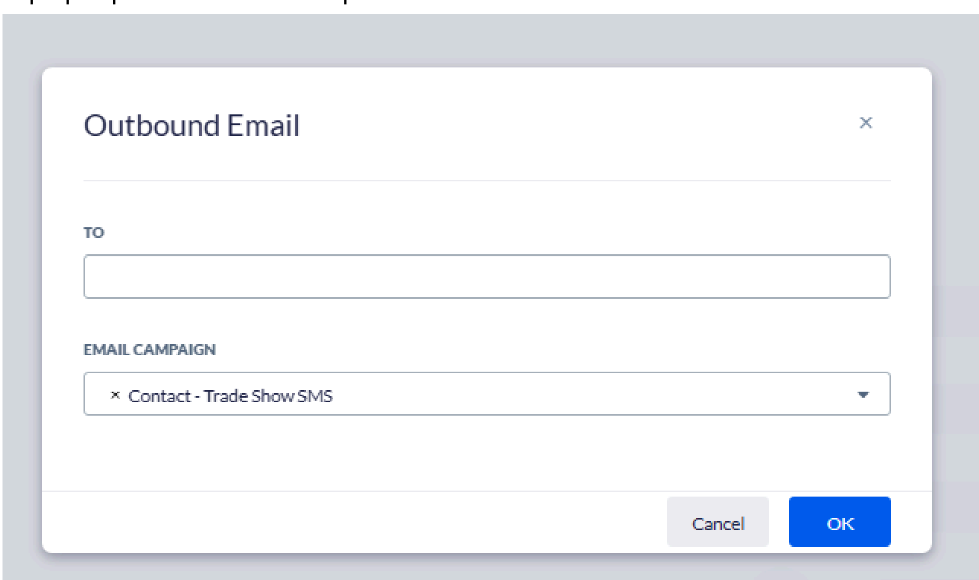
To send an outbound email:

1. Select the avatar icon to access the User Menu.



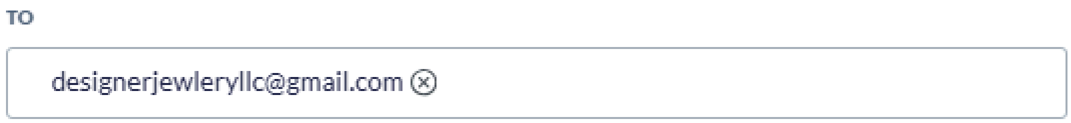
2. Select **Outbound Email**.

3. A pop up-window will open.

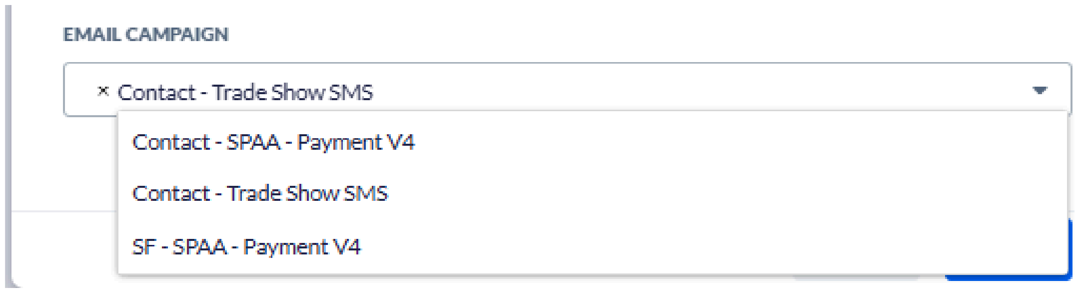


4. Enter the email address of the person you wish to send an email to in the **To** field.

5. Hit the **Enter** key on your keyboard. You should see a small “x” next to the address.

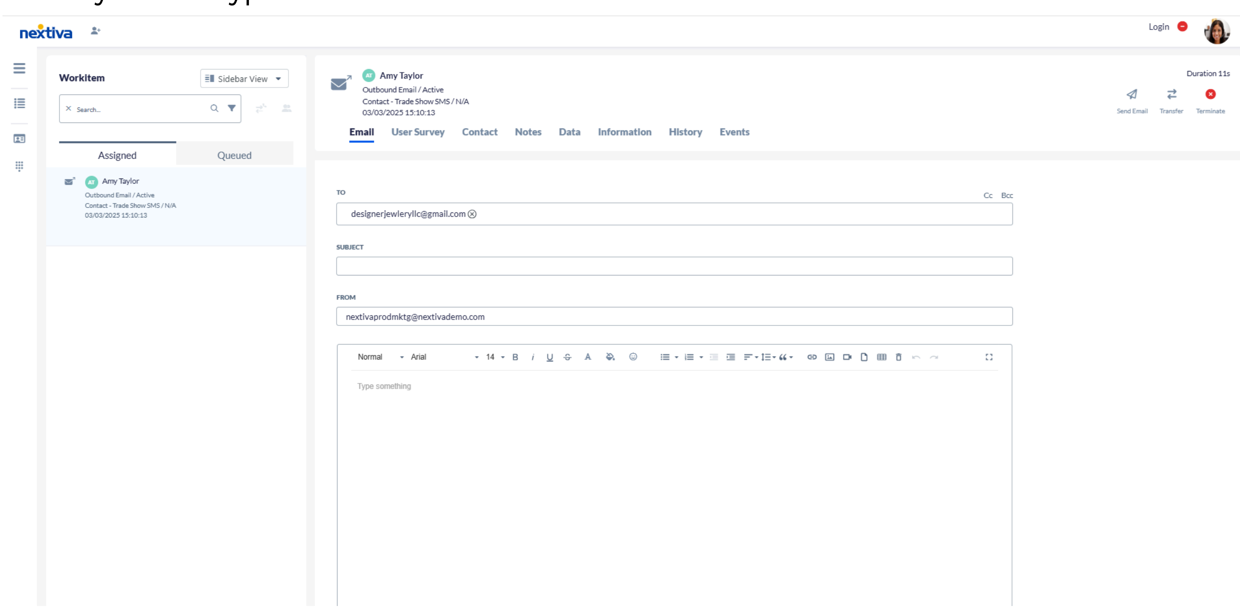


6. Then select the email campaign you wish to use from the **Email Campaign** drop-down list.



7. Select **OK**.

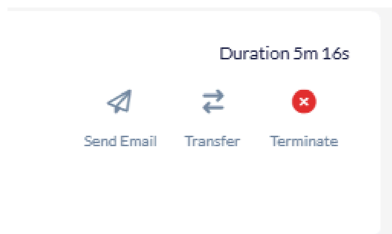
8. After you Select OK, you will be directed to an active email workitem where you can type the email.



9. You can add a subject in the **Subject** field.

10. You can send the email by scrolling down and selecting the Send icon.

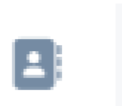
Or you can select the **Send Email** icon in the Workitem banner.



Sending an Outbound Email from a Contact

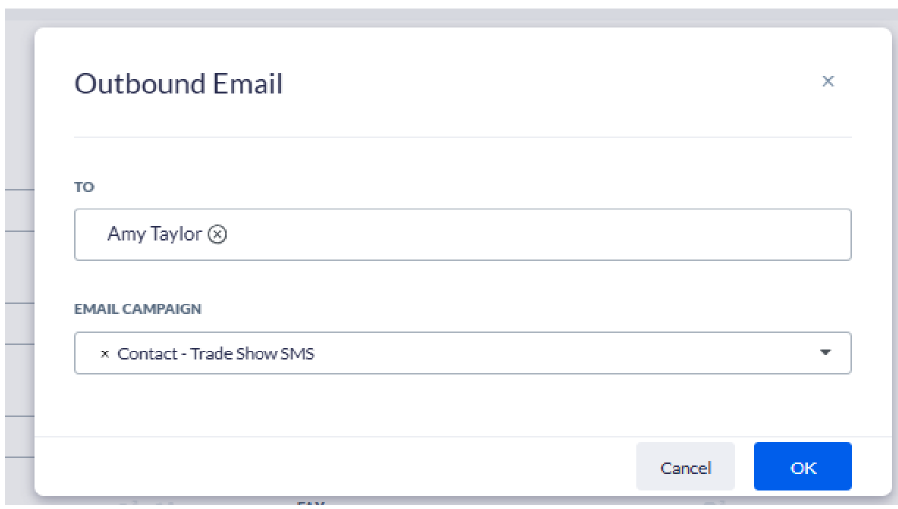
You can also send an email from a contact within the Nextiva system.

1. Select the contact icon from a navigation bar or the User Menu.

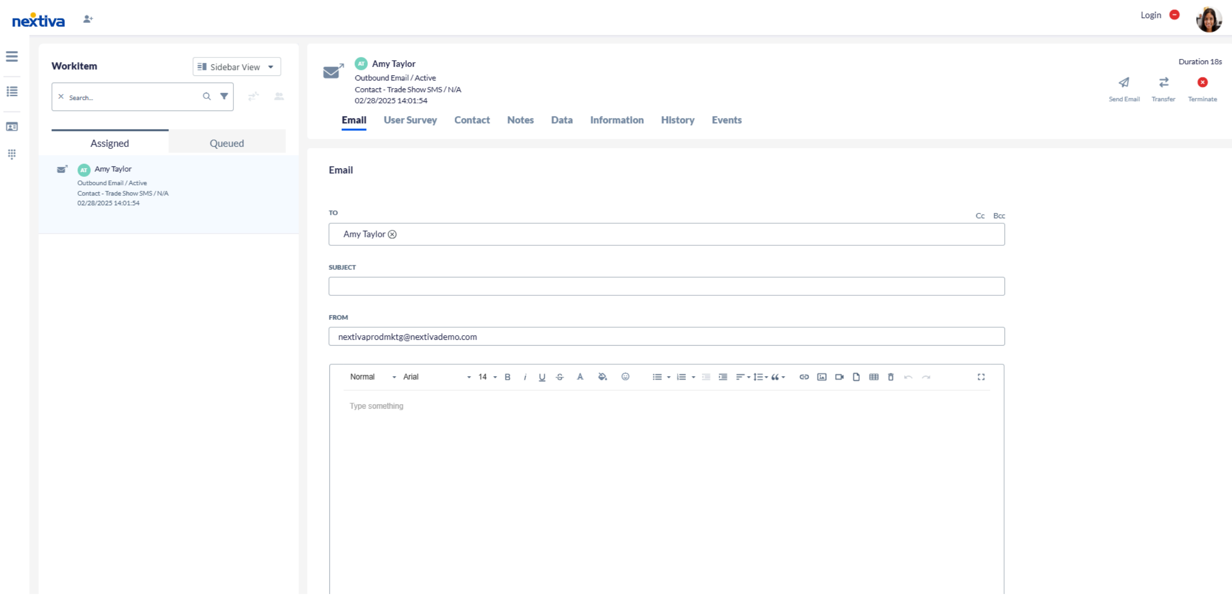


2. Double select the contact you want to send an email to.
3. Select the envelope icon next to the contact's email address in the Email field in the Information tab.

4. When initiating an outbound email from a contact the Nextiva system will use the default email campaign that you have selected under user settings.



Xbert Tip: To see the outbound email you will need to navigate to the workitem view.



Xbert Tip: Busy Connect Again does not work with email workitems.

Email Signature

You can now 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.

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

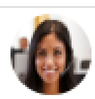
- Headings
- Font
- Font size
- Text formatting (bold, italics, underlining and text color)
- Emojis (New emojis have been added to Nextiva that can be used anywhere messages are sent in Nextiva including different skin colors and you can search for emojis by emotion.)
- Lists
- Paragraph formatting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

Xbert Tip: If you try to insert an inline image over 2MB it will be added to the attachments instead of inserted in the email. Files over 20MB will be rejected. If the total size of the files is greater than 20MB, you will receive an error message and the file will not be attached to the email.

Xbert Tip: .eml files are supported. Quicktime (.QT) files are not supported.

To create an email signature:

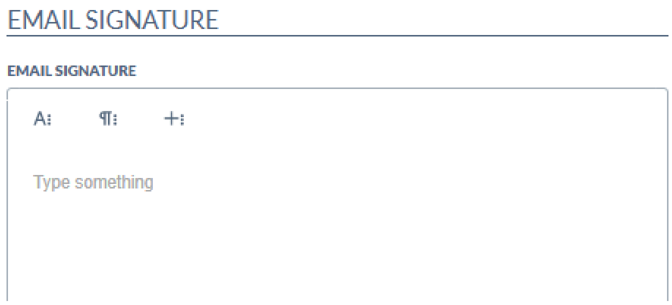
1. Select the avatar icon.



2. The User Menu will appear. Select **User Settings**.

3. Select **Email Signature** on the left-hand side of the pop-up window.

4. Enter the email signature.



5. Select **OK**.

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.