

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

S M S U S E R G U I D E

CX TRAINING TEAM
VERSION 2.02



nextiva

Welcome to the comprehensive guide for Nextiva Contact Center (NCC) SMS features, designed to enhance your customer service experience via SMS. This detailed resource is tailored for agents using the SMS-only Contact Center product type, providing them with the tools and insights needed to deliver exceptional service through SMS. 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 SMS capabilities.

Use this guide to:

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

Table of Contents

[Table of Contents](#)

[Dial Type](#)

[Select a Dial Type](#)

[Sending an SMS](#)

[Enable SMS for Outbound Messaging \(Admin\)](#)

[Send an SMS to a Customer](#)

[Answering an SMS](#)

[Open a Workitem](#)

[Switch Views \(optional\)](#)

[Transferring SMS](#)

Dial Type

The dial type allows you to select the Direct Inward Dialing (DID- also called a phone number) to make the SMS 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.

DIAL TYPE



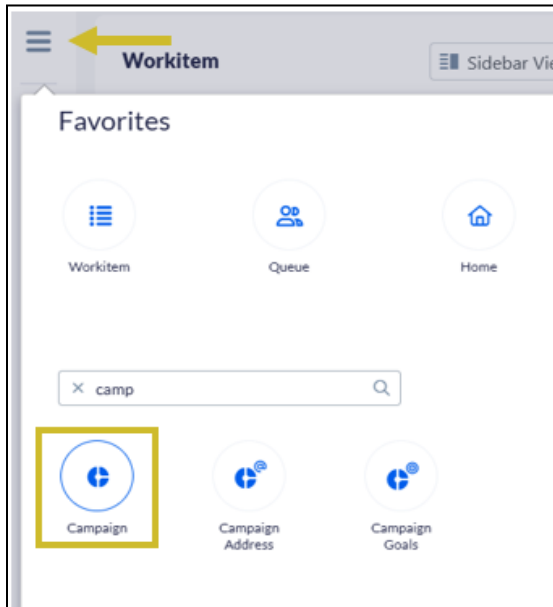
2. The type will darken to show it has been selected, as seen in the image above.
3. Reselect the dial type the next time you need to send a workitem, as the dial type selection will reset upon logging out.

Sending an SMS

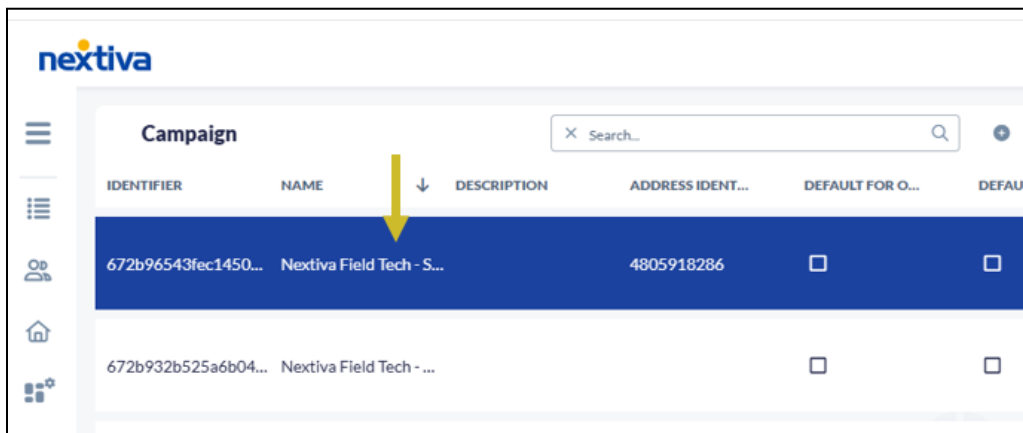
This section walks you through enabling SMS for agents (admin steps) and then details how an agent sends a text message to a customer, based strictly on your provided documentation.

Enable SMS for Outbound Messaging (Admin)

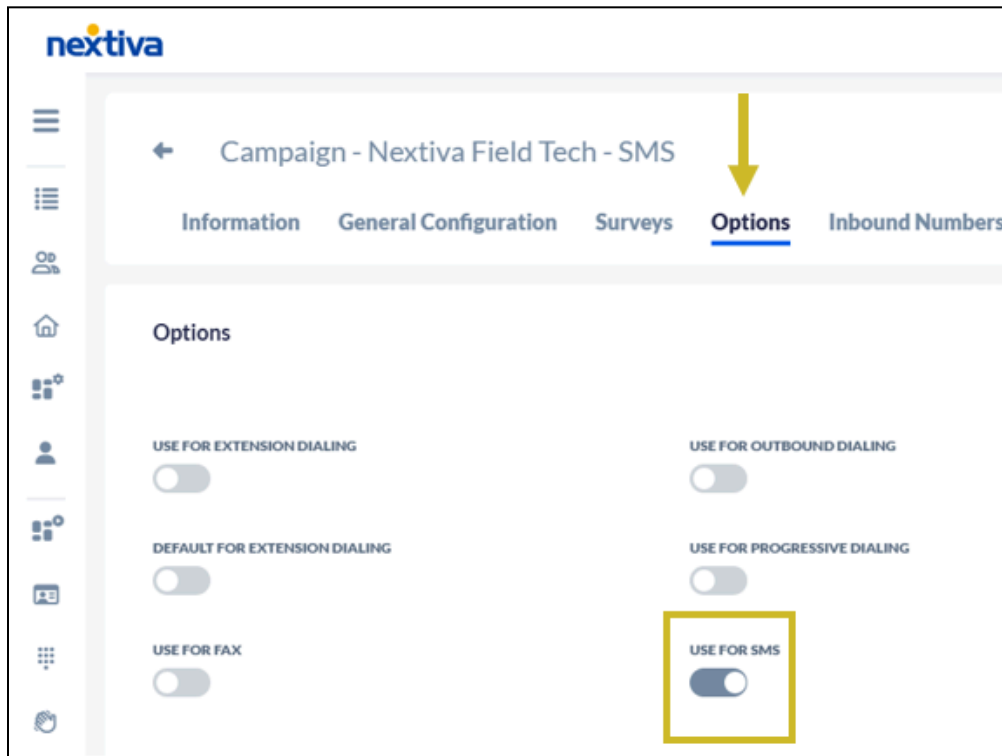
1. Open the Options menu and select Campaign.



2. Select the campaign you want to enable for SMS.



3. Select the **Options** tab, and set the toggle for Use for SMS to ON. This allows agents to send manual outbound SMS to customers.



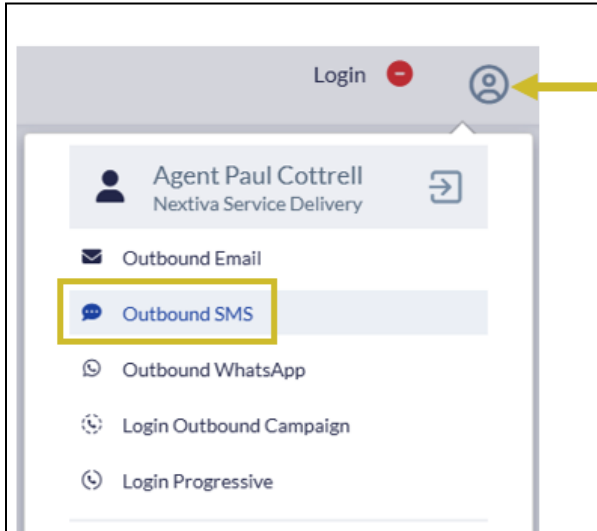
4. Confirm the campaign is assigned a SMS-capable DID (phone number).

XBert Tip: The number must be provisioned for SMS; 10DLC registration is required.

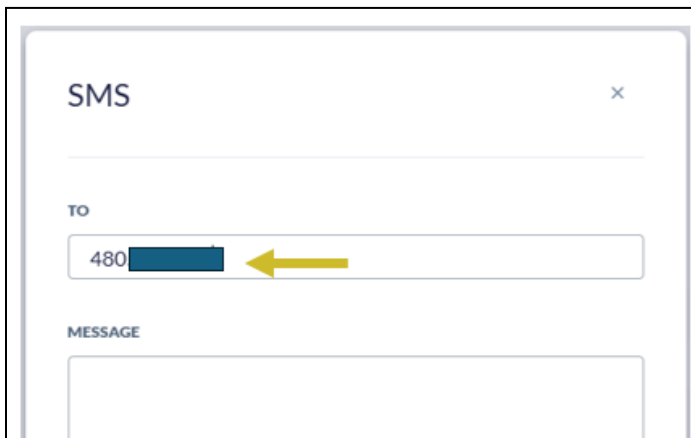
5. Assign Workflow, ensuring the campaign's workflow includes the two-way SMS function as described in your workflow configuration.

Send an SMS to a Customer

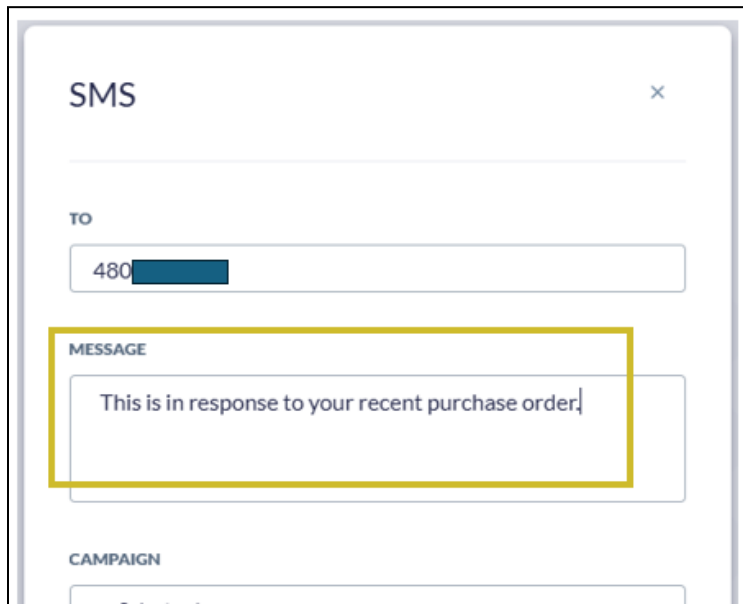
1. Open the Avatar menu and select **Outbound SMS** (the specific menu or button will depend on your interface setup).



2. In the SMS form, enter the customer's mobile phone number (must be a U.S. number and SMS-capable).

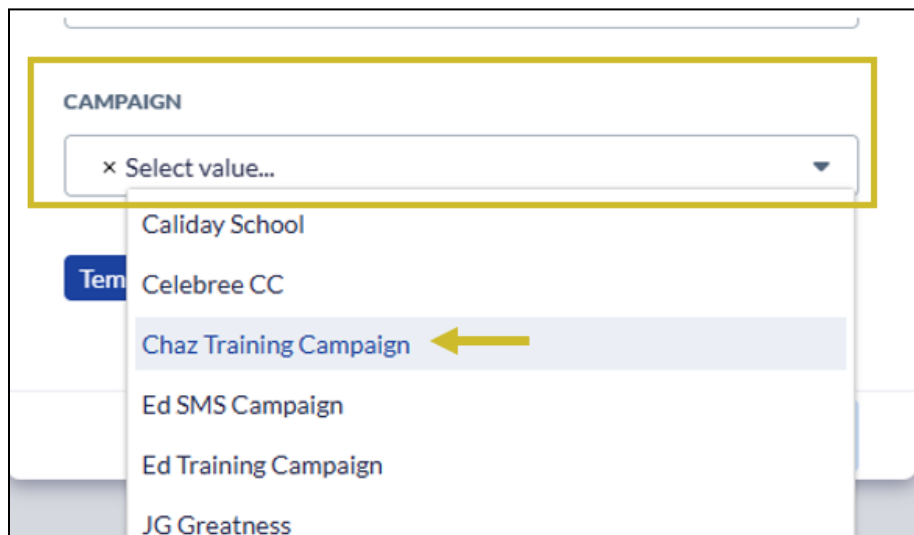
A screenshot of an 'SMS' form. The title 'SMS' is at the top left, and a close button 'x' is at the top right. Below the title, there is a 'TO' label and a text input field. The input field contains the number '480' followed by a blue rectangular placeholder. A yellow arrow points to the input field. Below the 'TO' field, there is a 'MESSAGE' label and a larger text input field for the message content.

3. Type your message in the provided text field.



The screenshot shows an 'SMS' form with a close button (x) in the top right corner. Below the title is a horizontal line. The 'TO' field contains the number '480' followed by a blue square. The 'MESSAGE' field is highlighted with a yellow border and contains the text 'This is in response to your recent purchase order,'. Below the message field is the 'CAMPAIGN' dropdown menu, which is currently empty.

4. If required, select the SMS-enabled campaign from the dropdown list.

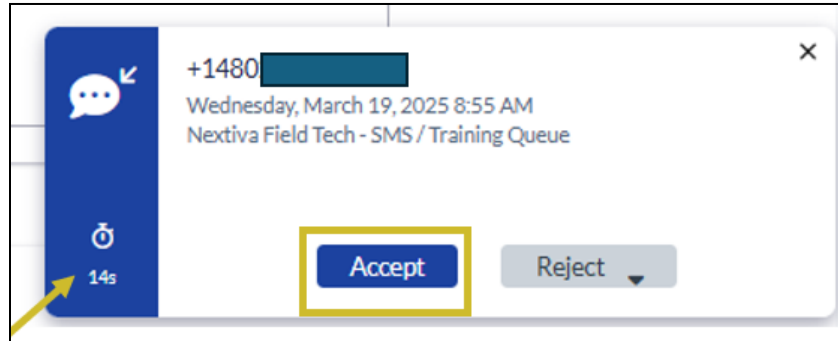


The screenshot shows the 'CAMPAIGN' dropdown menu. The dropdown is open, displaying a list of campaigns. The first option is 'Caliday School'. The second option is 'Celebree CC'. The third option, 'Chaz Training Campaign', is highlighted with a blue background and a yellow arrow pointing to it. The fourth option is 'Ed SMS Campaign'. The fifth option is 'Ed Training Campaign'. The sixth option is 'JG Greatness'. The dropdown menu is enclosed in a yellow border.

5. Select **ok** to transmit the message.
6. Monitor for Replies. The customer's reply will appear as a new SMS workitem in your queue, just like inbound SMS from customers.

Answering an SMS

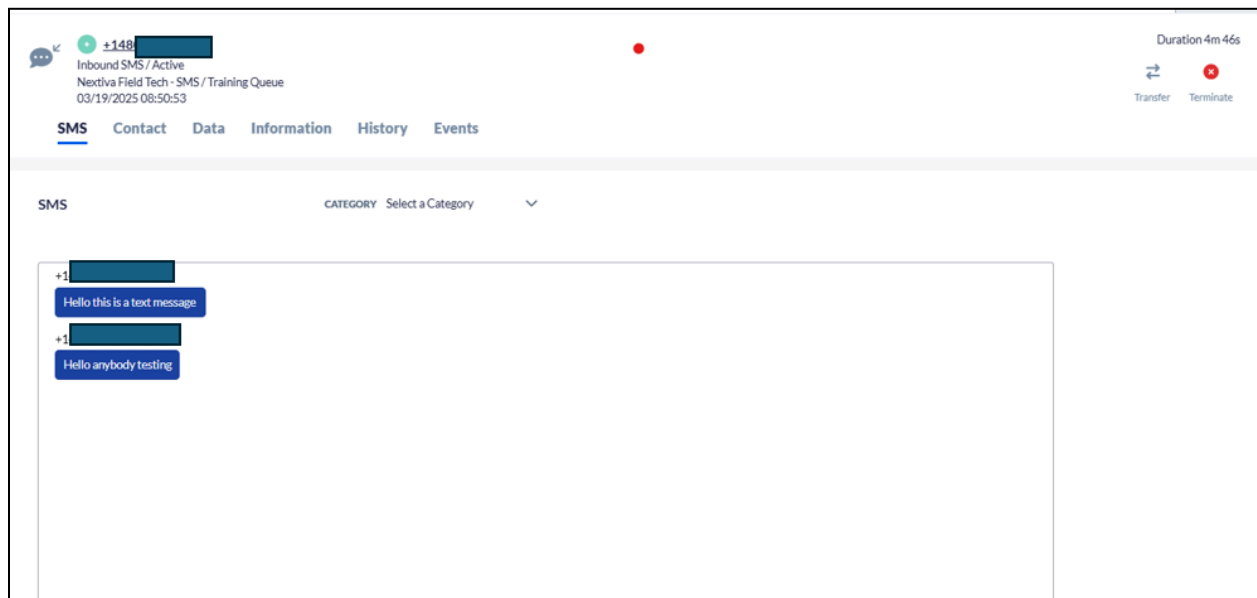
To answer an incoming SMS, select the **Accept button** in the pop-up window that shows up when receiving a workitem.



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

Open a Workitem

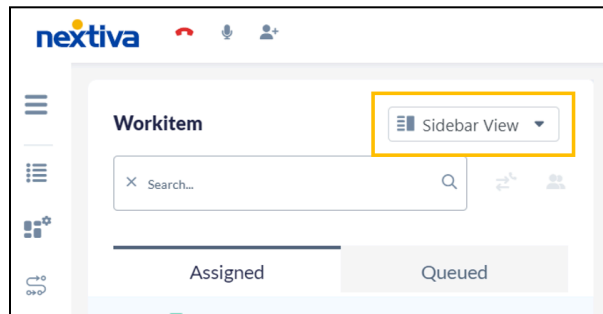
To open a workitem, select the workitem. This allows you to view details in the Detailed View.



Switch Views (optional)

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

- Use **List View** to only view your current workitem
- Use **Sidebar View** to manage multiple workitems simultaneously.



Contacts Tab

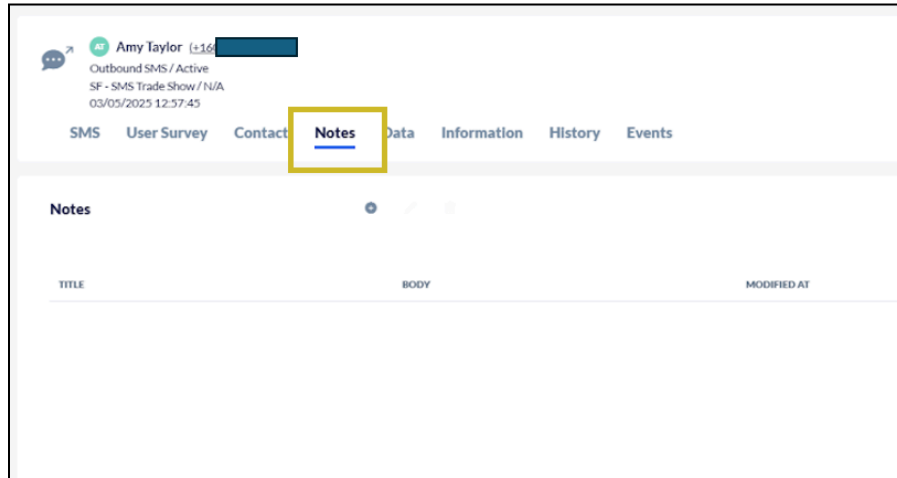
Select the Contacts tab to view more details specific to your customer your messaging

A screenshot of the Nextiva Contacts Tab interface. The top bar shows the contact's name 'Amy Taylor' and status 'Outbound SMS / Active'. Below this, there's a 'Contact' tab highlighted with a yellow box. The main area contains a contact form with fields for NAME, FIRST NAME, LAST NAME, ADDRESS, CITY, STATE, ZIP CODE / POSTAL CODE, COUNTRY, TIMEZONE, EMAIL, PHONE, and MOBILE. The form is pre-filled with 'Amy Taylor' for name, 'Amy' for first name, 'Taylor' for last name, and 'America/New_York' for timezone.

The contact screen provides you with the ability to get a quick look at essential customer information. This includes fields for name, address, email address, time zone, coordinates, date of birth, and customer ID numbers or case numbers.

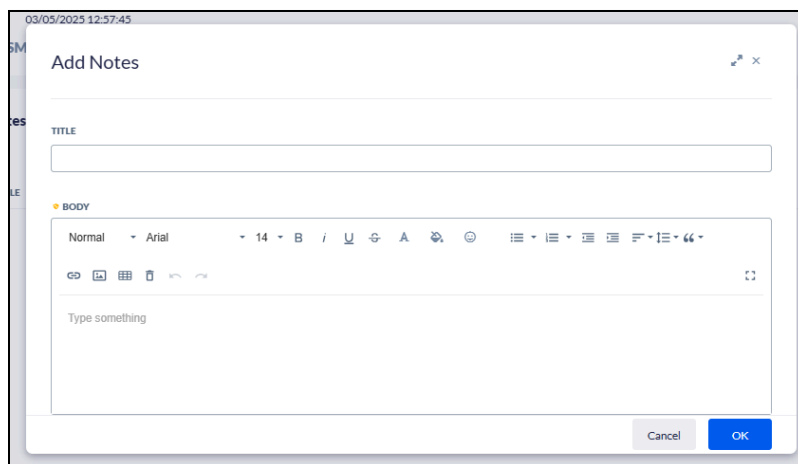
Notes Tab

Select the Notes tab to see existing notes on the customer taken by other agents and you can also create a new note



To create a new note:

1. Select the plus (+) sign at the top. A pop-up window will appear.

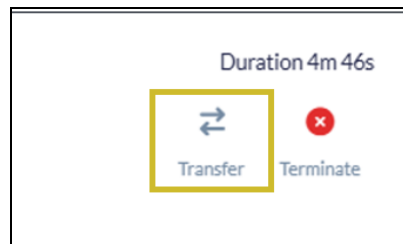


2. Enter the title of the note in the Title field.
3. Enter the note in the Body text field.
4. Click OK.

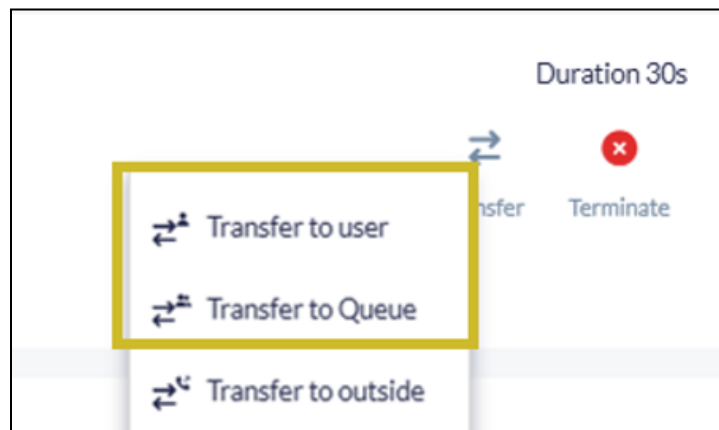
Transferring SMS

If an SMS 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 SMS workitems, all transfers are considered “blind”).

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



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



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

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

- b. Choose **Transfer to Queue** to send the SMS into a queue to follow its routing rules to the next Available agent .

Dispositioning Workitems

Dispositioning a workitem is an effective way to categorize workitems by customer request, reason for the interaction, or the end result of the workitem.

To disposition a workitem:

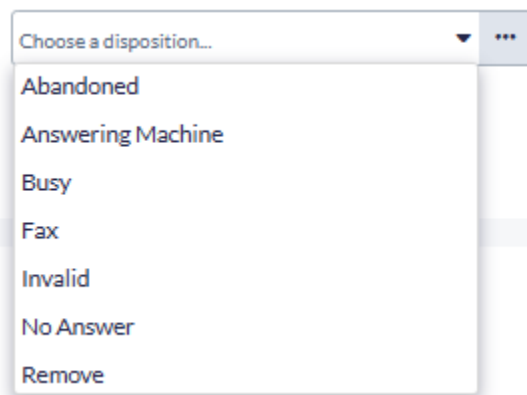
1. Terminate the workitem



2. You will see a drop-down menu in the workitem banner that says Choose a disposition.



3. Click the drop-down arrow, a list of configured dispositions will appear.



4. Choose the disposition that best describes the result of the customer interaction.