



Nextiva Contact Center

Workflow Components

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NCC Workflows Introduction

The campaign and function workflows are very flexible and easy to use. They are composed primarily of drag-and-drop components that use some logic to move from place to place and create dynamically changing states. A state is a self-contained set of instructions with input and output transitions. The main workflow canvas holds the states related to setting up the flow. These can be of varying complexity, and the first thing to do is lay out the states you will need to use on this canvas. These states should be considered separate areas of the flow to make visualizing the flow much easier. Each state can be opened up (by double-clicking) and will include a series of components that carry out different workflow tasks. To use these, simply drag a component into the center of the state canvas. This will fix the component to the center top. Following components can be dropped beneath the component or on top of components, depending on the desired order.

Each component has a set of fields to fill in. These are not always mandatory and give several options to components on how they work.

All workflow canvases come with the default settings of a begin state, an end state, and a start transition between them. These are for campaigns that use outbound workitems; inbound campaigns require a configuration.

NOTE: Outbound campaigns may need a configuration, too, depending on the functionality.

State Machine



By default, you must always have a Begin State that workitems come into. The End State should always contain a terminate action at the end of its flow, this signals the end of the interaction and prepares it for storage in the historical database. It isn't recommended to put much in the End State, use intermediate states instead. The Workflow Option panel in a campaign (located just above the workflow) can determine whether a hang-up event takes the workitem to the End State (where it is terminated) or an intermediate state.

Using this, you can achieve after-call automated flows that finish the workitem off and call any final components before sending the workitem to the database for storage.

Good practices when creating workflows include:

- Any components used in the workflows should be well-labeled and have a good description so that other people who look at them can understand what it's doing.
- Only one person should work on a flow at a time.
- Separate contained parts of the workflow into separate states or functions, if they can be reused in other campaigns.

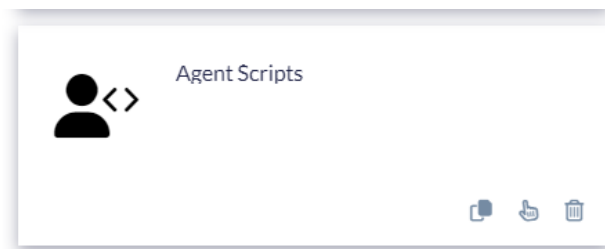
- Any scripting should be done in the Script objects.

Action

The Agent Scripts Component

An agent script presents a set of guidelines to the agent for better engaging in conversation with customers. The Agent Scripts component tells the system which script(s) should be displayed to the agent from the list of all scripts and will replace the currently set script(s) in the campaign. The selection of the scripts may depend on the earlier stages of a workflow or the condition applied. This way, a workflow may set a particular script based on customer preferences. Multiple scripts can be presented within a single workflow and changed dynamically along the way.

NOTE: If all scripts that were assigned to the campaign are to be displayed, this component is not needed in the workflow.



Configuration Fields

After selecting an Agent Scripts component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.

Scripts	Where you select the scripts to be displayed to the agent if this component is run.
---------	---



NAME

Agent Scripts

DESCRIPTION

SCRIPTS



CONDITION TYPE

x None

Close

Save & Close

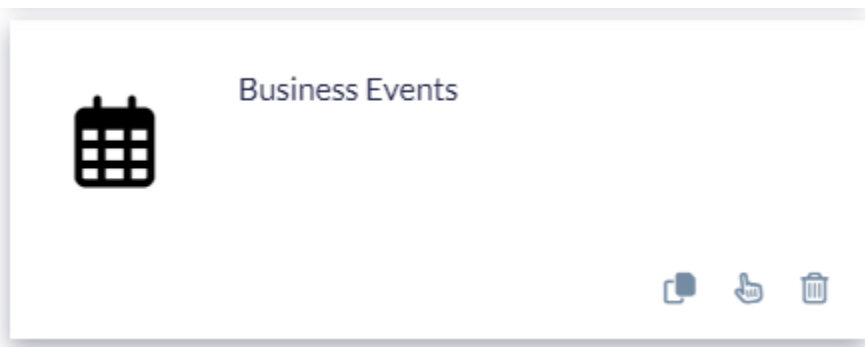
Save

The Business Events Component

The Business Event component allows the system to reload the times that have been configured in the Business Event object into memory. The times that are configured in business events are automatically loaded into memory, temporarily at the beginning of the workflow. If the times need to be reloaded in the middle of a workflow to compare them against the current time, then the Business Event component needs to be placed at that point in the workflow.

The Business Event component should be followed by another component that will have a condition that checks if the current date/time is in the list of times currently configured in the Business Event object and their corresponding time events.

NOTE: The Business Event component is not required if there is no need to check the time events beyond the beginning of the workflow.



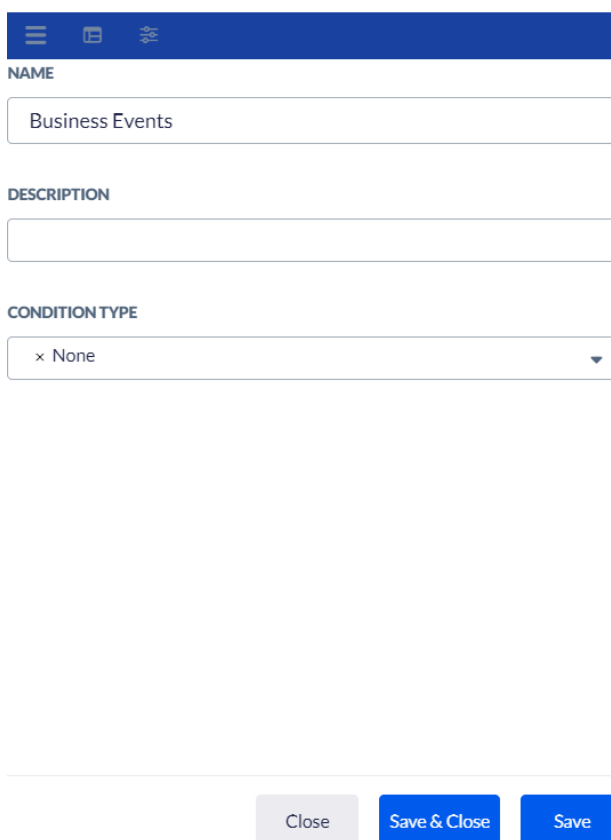
Configuration Fields

After selecting a Business Events component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.

To run a condition that checks the business event in question, it is necessary to have created the business event in its own object without any spaces in the name. Then with the business event object in a JavaScript condition you may find whether the current time is in range.

```
workitem.businessEvents.nameOfEvent == true
```



NAME

Business Events

DESCRIPTION

CONDITION TYPE

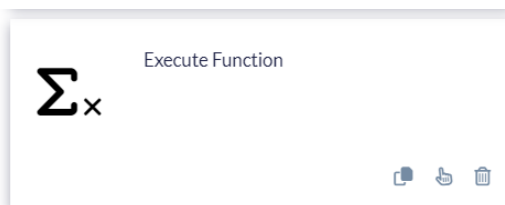
x None

Close Save & Close Save

The Execute Function Component

The Execute Function component allows the workitem to branch out from the workflow to execute a predefined or custom set of actions that were created in a Function object. The function has the ability to return to the workflow it was called from to continue its journey.

A function is essentially a self-contained workflow, such as the flow to create an ACD Voicemail or to check and play the current position in the queue to a customer.



Configuration Fields

The Execute Function component will have the following configuration fields:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Function Identifier (Mandatory)	Where you select the function to be executed.
Function Id from Expression (Optional)	In this field, users can specify the ID of the function or the variable that contains the ID.

NAME

Execute Function

DESCRIPTION

FUNCTION IDENTIFIER

FUNCTION ID FROM EXPRESSION

CONDITION TYPE

× None

Close

Save & Close

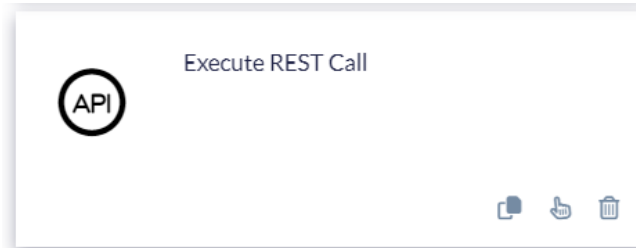
Save

The Execute Rest Call Component

Nextiva uses Rest APIs as its main source of information movement. Restful means that it is in constant communication with the database and can modify data

dynamically. The Execute REST Call component is used to execute a REST API that has been defined in the Rest API object, this is used to call external APIs to connect with external systems, it is possible to call Thrio native APIs that are not included in a component for specific purposes. This component is mostly used to communicate with external systems and can be used to update data in a CRM such as Dynamics or Salesforce.

A RESTful API is an architectural style for an application programming interface (API) that uses HTTP requests to access and use data. That data can be used to GET, PUT, POST and DELETE data types, which refers loosely to the reading, updating, creating and deleting operations concerning resources. Thrio is largely based on REST APIs and by default uses JSON type objects for the transfer of data due to its widespread support on applications.



Configuration Fields

When configuring an Execute REST Call component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type(Optional)	The generic fields as seen in the introduction.
Response Variable (Mandatory)	The variable name to be used to store the result object of the REST API call.
REST Call Identifier (Mandatory)	Select the REST API to be executed from the drop-down list.

A REST API result may then be used in a condition to trigger other components in the workflow. For example an API is executed and the result is saved in a data object called apiResult:

```
workitem.data.apiResult.httpStatus==200
```

This will trigger the next component if the API was run appropriately (result status 200 OK).

NOTE: REST APIs are created using the REST API object available in the Options Menu.

NAME

Execute REST Call

DESCRIPTION

CONDITION TYPE

× None

RESPONSE VARIABLE

REST CALL IDENTIFIER

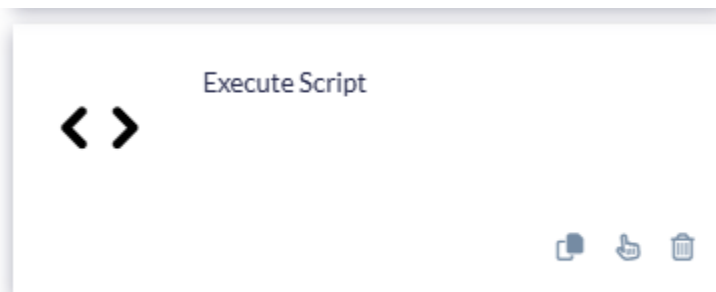
Close

Save & Close

Save

The Execute Script Component

This component executes a script that is created in a script object. You must create the script first in the script tab, then in the workflow you call the script that you previously created.



Configuration Fields

When configuring an Execute Script component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Script Identifier	The script you want executed.
Variable Name	The script executes and saves in the variable. This is hard-coded.

NAME

Execute Script

DESCRIPTION

SCRIPT IDENTIFIER

VARIABLE NAME

CONDITION TYPE

× None

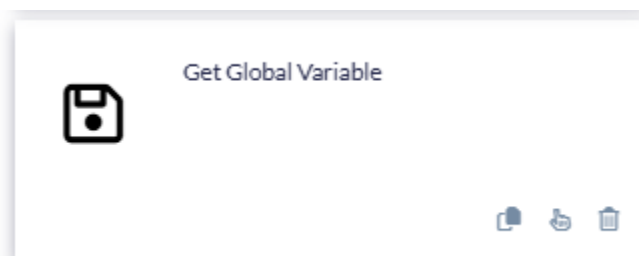
Close

Save & Close

Save

The Get Global Variable Component

The Get Global Variable component retrieves a global variable that was created in the Set Global Variable component, for further use in workflows.



Configuration Fields

When configuring a Get Global Variable component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Global Variable Name	The name of the global variable created in a Set Global Variable Component.
Variable Name	The name of the variable that will host the global variable

NAME

Get Global Variable

DESCRIPTION

GLOBAL VARIABLE NAME

VARIABLE NAME

CONDITION TYPE

× None

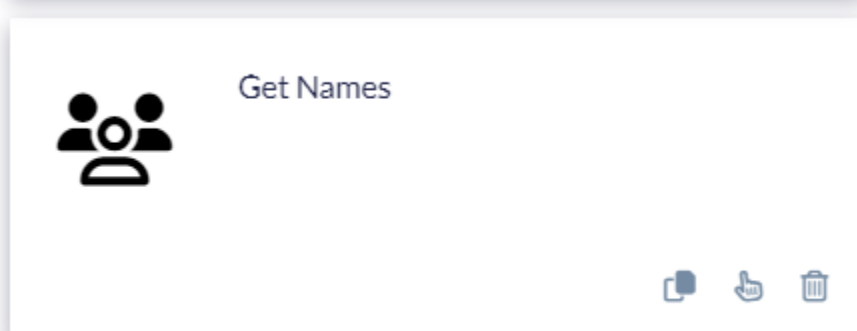
Close

Save & Close

Save

The Get Names Component

Get Names is used to find the names of the users in the application and bring them into the workflow. This is useful to set up an Auto-Attendant in a function, which prompts the customer to enter the first 3 or 4 letters of the name of the agent they would like to speak to and returns the names that match with the Get Names component.



Configuration Fields

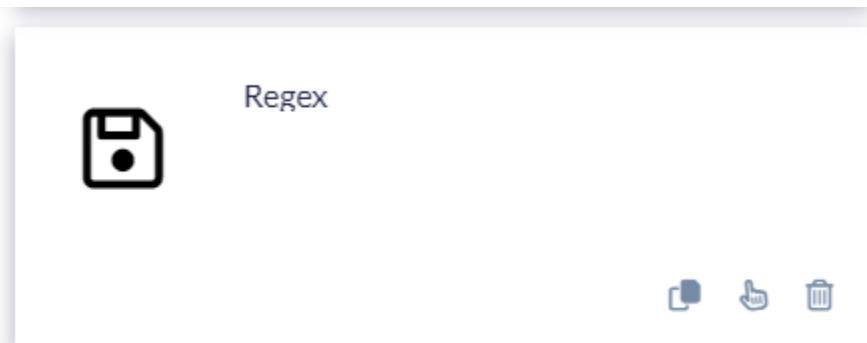
When configuring a Get Names component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Digits	The variable that saved the digits inserted by the customer corresponding to the letters of the agent's name that they are seeking to contact.
Voice Recognition Name	The variable that has saved the recording of the name.
First Name Field	The field inside the Nextiva Users object that corresponds to the First name (almost always firstName).
Last Name Field	The field inside the Nextiva Users object that corresponds to the First name (almost always lastName).

Variable Name	The name of the variable in which to save the list of agent identifiers that match the customer's selection.
---------------	--

The Regex Component

Regular expressions are a standard search and match operation that can validate whether a target string is of a particular pattern. This component takes a string and a pattern to match and will save a result of all the occurrences of the pattern of the target string inside the Variable Name which may then be used in further workflow components. For example, a regex could be used to find if a saved variable is in the appropriate string pattern, or to check whether the content of an SMS or Chat message for a particular pattern type. This will allow workflows to carry out checks on the data that comes through and then make transitional decisions.



Configuration Fields

When configuring a Regex component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Expression	The REGEX expression that is to be pattern matched.

Target	The target string to check if it matches the above pattern.
Variable Name	The name of the variable in which the result of the pattern matching will be saved.

NAME

Regex

DESCRIPTION

EXPRESSION

TARGET

VARIABLE NAME

CONDITION TYPE

× None

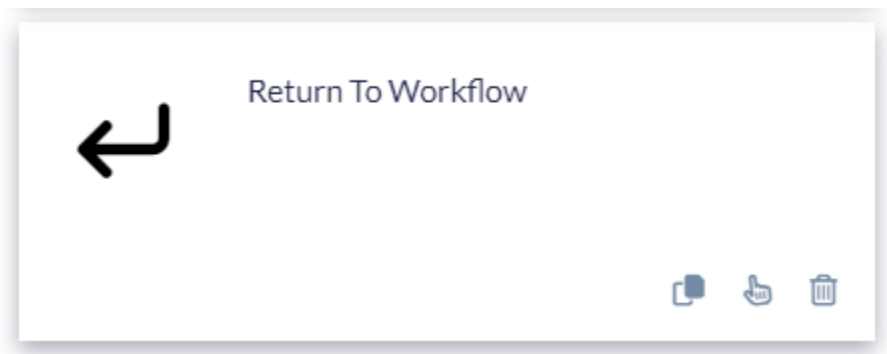
Close

Save & Close

Save

The Return To Workflow Component

The Return to Workflow Component is used inside a function. When used, it will return to the workflow of the original campaign and the workitem will continue from the point at which the function was called. This is used exclusively in a function where the control of the workitem has been taken over by a separate system engine.



Configuration Fields

When configuring a Return To Workflow component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.

NAME

Return To Workflow

DESCRIPTION

CONDITION TYPE

x None

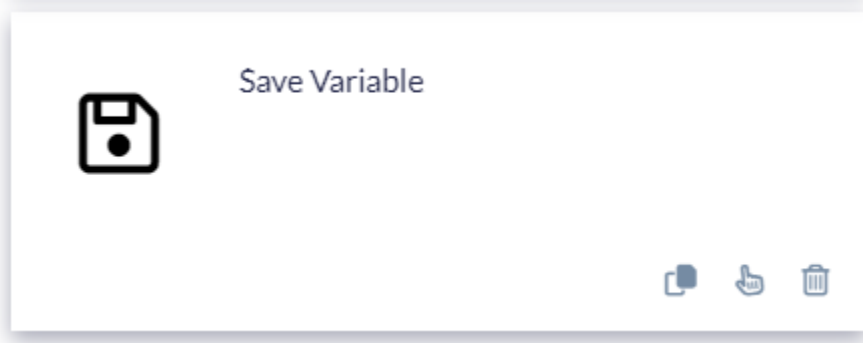
Close

Save & Close

Save

The Save Variable Component

The Save Variable component is used to store information in memory that can be referenced and manipulated at any time while the workitem is in the workflow. So information on a particular workitem can be held in a separate section, which will then be available in history too. The saved values are located inside the workitem object's data section (accessed via `workitem.data.nameOfVariable`).



Configuration Fields

When configuring a Save Variable component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Expression	Any value that the workflow will store in memory. This value can be text, numbers or a formula.
Variable Name	The name of the variable where the expression will be stored. NOTE: All variables that are created with the Save Variable component are stored in memory in the form of: <code>workitem.data.Variable Name</code> .
As Object	Tells the system to save the variable as an object (as opposed to as a string). This should be marked true if the variable

	is to be used for mathematical operations, else it would be necessary to use it as a string in any future conditions in the workflow.
Data Loss Prevention	To be marked true or false if this data is not to be stored in the system. The data will be overwritten before it reaches the database. An example would be if the customer provides sensitive information such as credit card details.
WFM Variable	The workforce management variable. This is the same variable if you're going to integrate with workforce management software.
Send to Dashboard	If enabled, the variable will be sent to a dashboard.

NAME

Save Variable

DESCRIPTION

EXPRESSION

VARIABLE NAME

AS OBJECT

DATA LOSS PREVENTION

WFM VARIABLE

SEND TO DASHBOARD

CONDITION TYPE

×

None

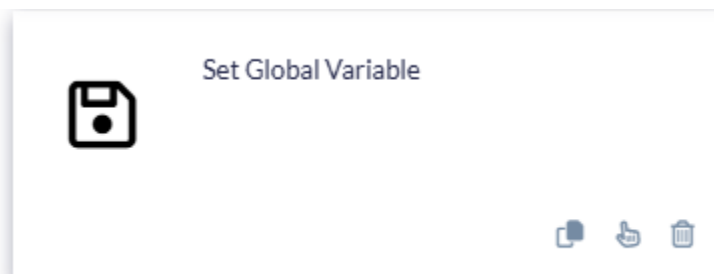
Close

Save & Close

Save

The Set Global Variable Component

The Set Global Variable component allows global variables to be used in workflows and functions in Nextiva Contact Center.



Configuration Fields

When configuring a Set Global Variable component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Global Variable Name	The name of the global variable.
Expression	Any value that the workflow will store in memory. This value can be text, numbers or a formula.



NAME

DESCRIPTION

GLOBAL VARIABLE NAME

EXPRESSION

CONDITION TYPE

× None ▼

Close

Save & Close

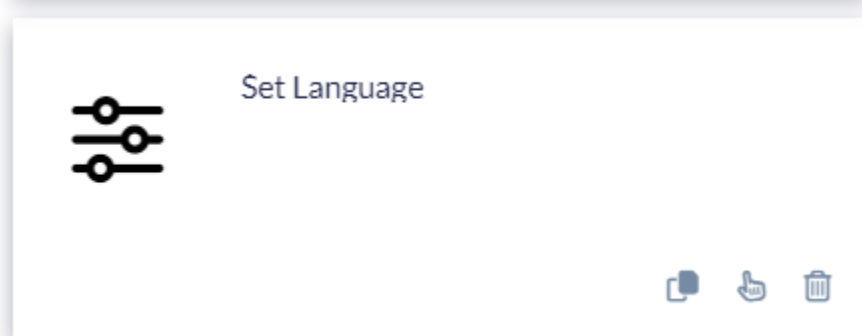
Save

Using Global Variables

<https://nextiva.atlassian.net/wiki/spaces/VP/pages/3190358029/NCC+General+Guides#Using-Global-Variables-in-workflows%2Ffunctions>

The Set Language Component

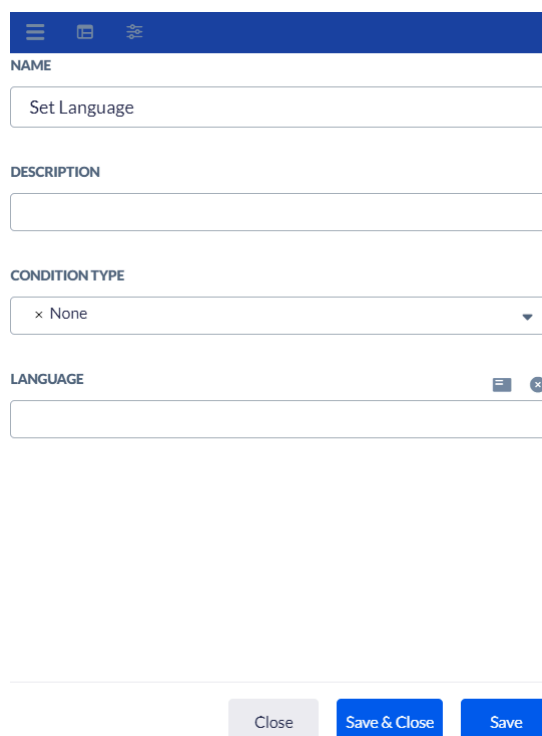
The Set Language component allows the workflow to change the current language used. This will mean that prompts will be played in the alternate language as well and transcription and other recording services will take as the likely language. Most often, this component is used after a choice of language prompt, where digits are collected using the desired language selection.



Configuration Fields

When configuring a Set Language component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Language	Select the language to change to from the list icon.

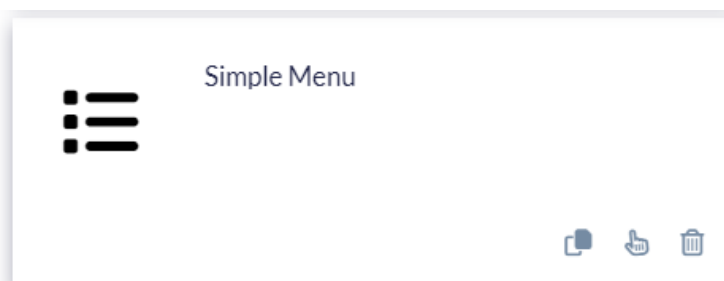


A form for creating a Simple Menu component. It features a blue header bar with three icons: a hamburger menu, a document, and a settings gear. Below the header, the form has four sections: 'NAME' with a text input containing 'Set Language'; 'DESCRIPTION' with an empty text input; 'CONDITION TYPE' with a dropdown menu showing 'x None'; and 'LANGUAGE' with a text input and a small icon of a document with a plus sign. At the bottom, there are three buttons: 'Close' (grey), 'Save & Close' (blue), and 'Save' (blue).

The Simple Menu Component

This component allows a function to define options that are available to a customer in a menu. It can be used to define separate states for selections offered to a customer. This component gives more control over the workflow of an IVR and can be reused in different campaigns because it requires setting one function.

The function must have variables saving the retries and a result at the start of its flow. Then in the menu state the retries on the menu must be decremented as the customer loops round. This gives control over the way that a menu in an IVR may work in a single component.



Configuration Fields

When configuring a Simple Menu in the Workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Error Prompt (Mandatory)	The prompt to play if the customer fails to select an appropriate option from the menu within the number of retries.
Function (Mandatory)	The function that contains the menu options.
Main Prompt (Mandatory)	The prompt that contains the initial menu options.
Retries (Optional)	The number of retries that need to be given.
Timeout In Seconds (Optional)	Timeout for the customer to insert the digits corresponding to their selection after listening to the entire prompt.
Valid Digits (Mandatory)	The list of digits that will have available options in the workflow. Can be all digits but also # (pound/ hash) and * (star).

NAME

Simple Menu

DESCRIPTION

CONDITION TYPE

× None

ERROR PROMPT

FUNCTION

MAIN PROMPT

RETRIES

× Select value...

TIMEOUT IN SECONDS

7

VALID DIGITS

Close

Save & Close

Save

The image shows a configuration form for the 'Start Keep Alive' component. It has a blue header bar with three icons. The form contains several fields: 'CONDITION TYPE' with a dropdown menu showing 'None'; 'ERROR PROMPT', 'FUNCTION', and 'MAIN PROMPT' each with a text input field and a small icon; 'RETRIES' with a dropdown menu showing 'Select value...'; 'TIMEOUT IN SECONDS' with a text input field containing the number '7'; and 'VALID DIGITS' with a large text area. At the bottom, there are three buttons: 'Close', 'Save & Close', and 'Save'.

CONDITION TYPE

× None

ERROR PROMPT

FUNCTION

MAIN PROMPT

RETRIES

× Select value...

TIMEOUT IN SECONDS

7

VALID DIGITS

Close Save & Close Save

The Start Keep Alive Component

The Start Keep Alive component is used with Stop Keep Alive and SMS Wait for Messages components. It is used when you want to give the recipient of an SMS or Chat a maximum amount of time to respond to a message in the workflow, or else the workitem will be terminated. If the amount of time specified elapses before the recipient of the message responds, the workitem is terminated and the next communication (SMS or Chat) from the customer will come in as a new workitem.



Configuration Fields

When configuring a Start Keep Alive component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Timeout In Seconds	Enter the amount of time, in seconds, to give the recipient to respond before terminating the workitem.
Expired State	The expired state of the message.



NAME

DESCRIPTION

TIMEOUT IN SECONDS

EXPIRED STATE

× Select value... ▼

CONDITION TYPE

× None ▼

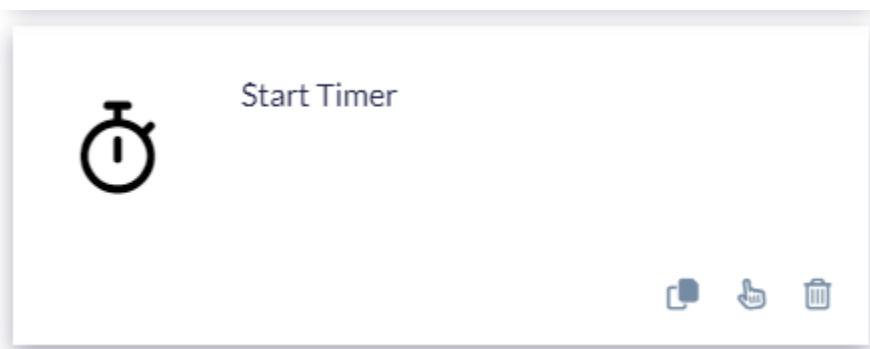
Close

Save & Close

Save

The Start Timer Component

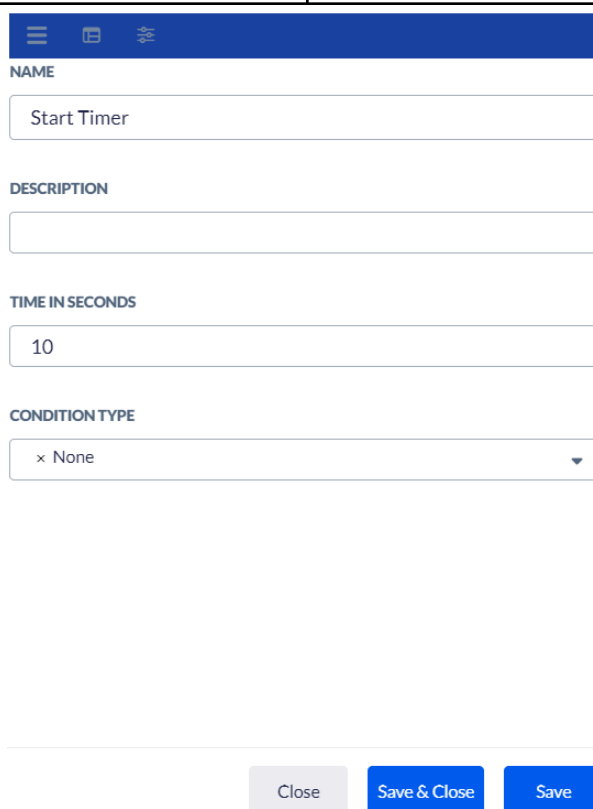
The Start Timer component pauses the workflow for a specified amount of time (in seconds). This may be used to define a certain amount of time to elapse between components or to keep the music playing up until a prompt is played after a desired amount of wait time.



Configuration Fields

When configuring a Start Timer component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Time In Seconds	Enter the amount of time, in seconds, to pause the workflow.



NAME

Start Timer

DESCRIPTION

TIME IN SECONDS

10

CONDITION TYPE

x None

Close Save & Close Save

The Stop Keep Alive Component

The Stop Keep Alive component is used in conjunction with Start Keep Alive and SMS Wait for Messages components, it will trigger an early termination of the workitem. It will do this if no message has been received from the recipient before the time

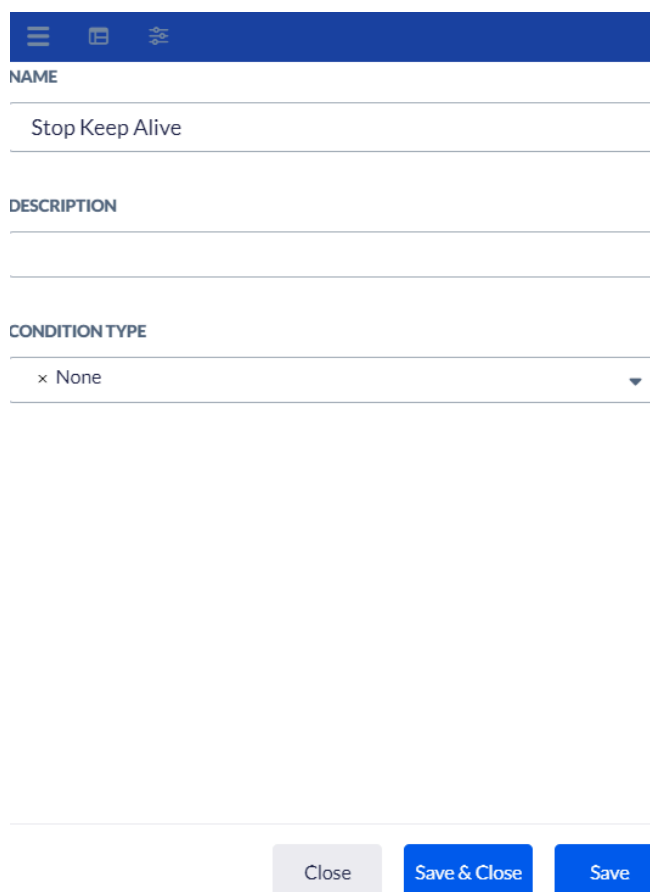
specified in the Start Keep Alive component has expired. If the amount of time specified elapses before the message's recipient responds, the workitem is terminated.



Configuration Fields

When configuring a Stop Keep Alive component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.



The image shows a configuration form for a survey component. At the top is a dark blue header bar with three icons: a hamburger menu, a calendar, and a list. Below the header, the form has three sections: 'NAME' with a text input field containing 'Stop Keep Alive'; 'DESCRIPTION' with an empty text input field; and 'CONDITION TYPE' with a dropdown menu showing 'x None'. At the bottom of the form are three buttons: 'Close' (light gray), 'Save & Close' (blue), and 'Save' (blue).

NAME

Stop Keep Alive

DESCRIPTION

CONDITION TYPE

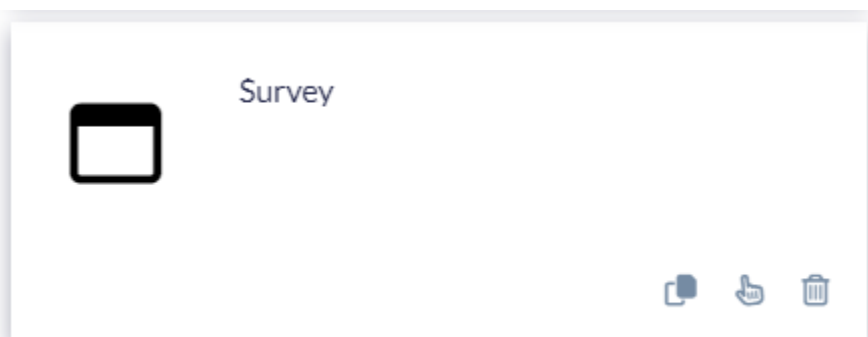
x None

Close Save & Close Save

The Survey Component

The Survey component allows the system to override the survey currently associated with the campaign; it provides a way to change which survey an agent sees dynamically. A survey is a useful tool that helps display dynamic data to an agent and allows them to modify and add information to the workitem. This component is mostly used to specify what survey is to be presented based on the conditional movement of the workitem throughout the workflow. Thrio's powerful workflow system gets the customer to the right agent upon first contact, and the Survey component can present the appropriate script and data to this agent once the communication is established.

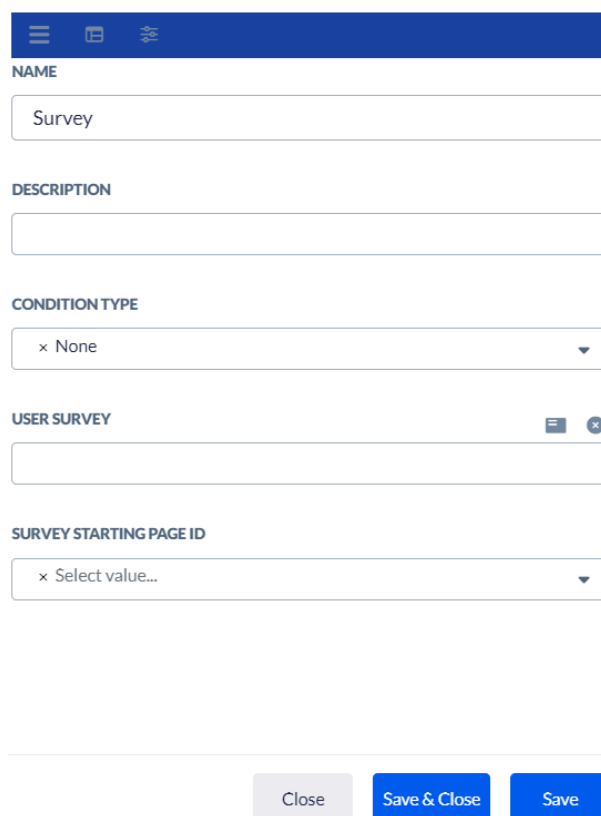
NOTE: This component is unnecessary if there is no need to override the survey currently assigned to the campaign.



Configuration Fields

When configuring a Survey component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
User Survey (Mandatory)	The survey to be displayed to the user.
Survey Starting Page ID (Optional)	You can specify which survey page is presented first by using the page ID. Entry page by default.



The image shows a configuration form for the 'Survey From Expression' component. It has a blue header bar with three icons: a menu, a document, and a speech bubble. Below the header, the form contains several fields: 'NAME' with a text input containing 'Survey'; 'DESCRIPTION' with an empty text input; 'CONDITION TYPE' with a dropdown menu showing 'x None'; 'USER SURVEY' with a text input and a small menu icon; and 'SURVEY STARTING PAGE ID' with a dropdown menu showing 'x Select value...'. At the bottom of the form are three buttons: 'Close', 'Save & Close', and 'Save'.

NAME

Survey

DESCRIPTION

CONDITION TYPE

x None

USER SURVEY

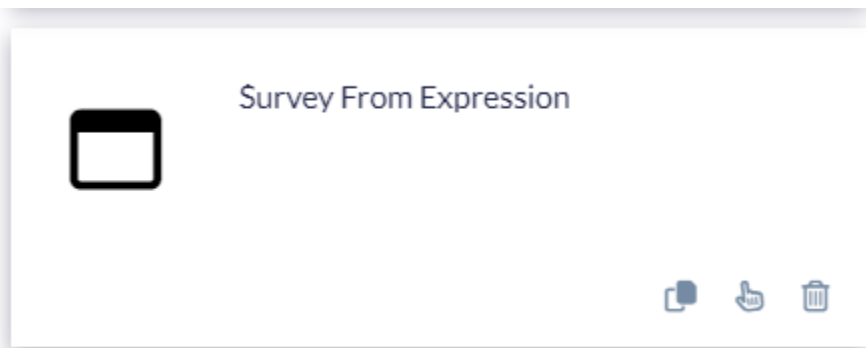
SURVEY STARTING PAGE ID

x Select value...

Close Save & Close Save

The Survey From Expression Component

Survey From Expression works similarly to the Survey component. It is used to change the survey in the workflow dynamically. From Expression means that it is necessary to pass the survey ID in the component to change the survey presented to the agent. The flexibility this component provides can be highlighted by the ability to switch surveys quickly and dynamically without requiring several components to be created in the workflow. It is commonly used in a function that can be reused in separate campaigns, passing the survey ID corresponding to the selected options. For example, suppose multiple campaigns use the same menu but different survey options. In that case, a function can be created with this menu and the Survey From Expression component so that each campaign passes the details of the appropriate survey in the function workflow.



Configuration Fields

When configuring a Survey From Expression component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Survey Id	The survey to be presented, passed via variable.



NAME

DESCRIPTION

CONDITION TYPE

x None

▼

SURVEY ID

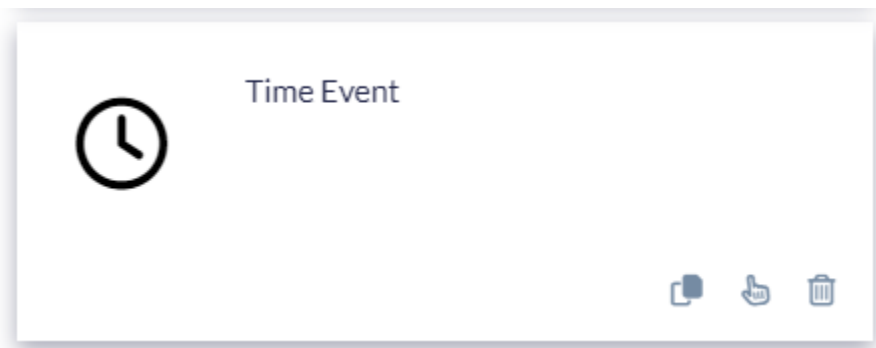
Close

Save & Close

Save

The Time Event Component

The Time Event component is used to record an event that will be saved in the event history of the workitem. It is separate from the Time Events object in that this one simply records a message in the workitem history at that time. It may pass variables into the recorded message. It is mostly used to track the stages at which the workitem has passed different workflow components and will display additional workitem-specific information in the history events. This allows for a clear evaluation and breakdown of where the workitem went.



Configuration Fields

When configuring a Time Event component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Name	The name of the event that is to be recorded in the event history, may take variables
Duration	The duration of the time event. This must be an integer and in milliseconds.



NAME

DESCRIPTION

TIME EVENT NAME

DURATION

CONDITION TYPE

× None

▼

Close

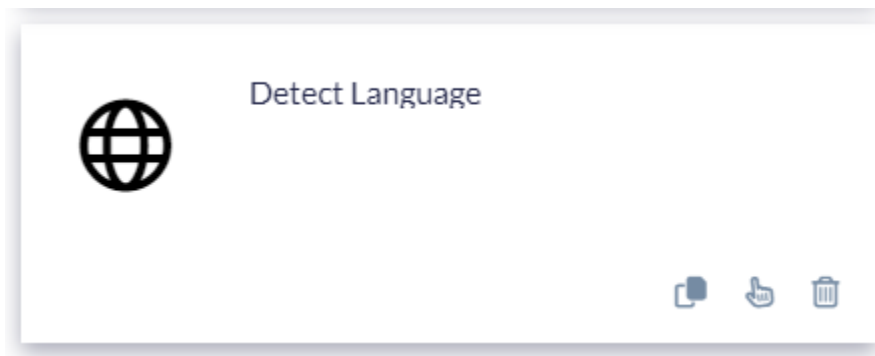
Save & Close

Save

AI

The Detect Language Component

The Detect Language Component takes a string of text and runs it through Google's Detect Language engine, similar to the auto-detect language functionality on Google translate page. This will save the predicted language in a `detectLanguageResult` variable inside the workitem. The `mostLikelyLanguage` variable inside that item will contain a 2 letter estimation of the detected language, such as 'en' for English or 'fr' for French. It is useful to use this on a text-based workitem such as SMS or Email to be able to detect the language and transition to an appropriate queue or set a different language (to English) in the workflow based on that result.



Configuration Fields

When configuring a Detect Language component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Text	The text for which the language detection is supposed to run.

NAME

Detect Language

DESCRIPTION

CONDITION TYPE

x None

TEXT

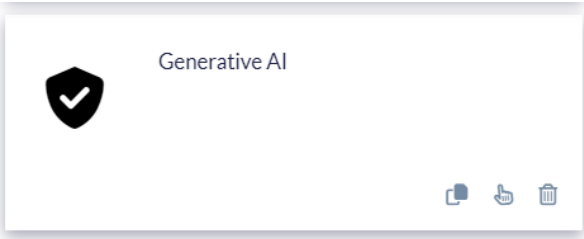
Close

Save & Close

Save

Generative AI Action

The Generative AI action can be used to simulate BOTS or to understand categories and queue text-based workitems.



Configuration Fields

The Generative AI action will have the following configuration fields:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

Content	The content the AI is going to be used on.
Text	The text the AI is going to be used on.
Service	The AI service that is being used.
Response Variable	The variable in which to save the results of the generative AI.

NAME

Generative AI

DESCRIPTION

CONTENT

TEXT

SERVICE

RESPONSE VARIABLE

Close

Save & Close

Save

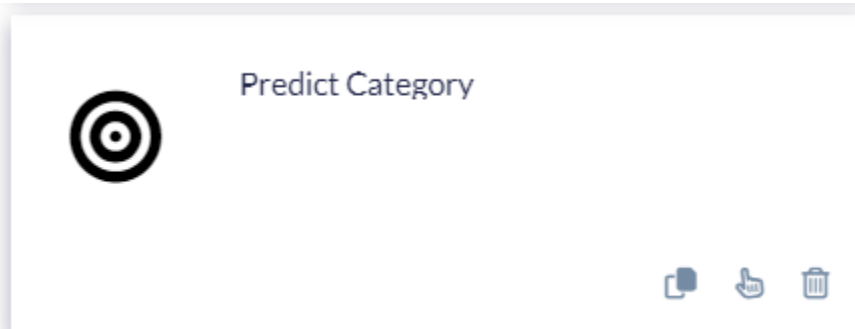
The Predict Category Component

One of the strongest machine learning functionalities that Nextiva implements is Google's Category Prediction component. This component takes input text and passes it through a machine learning model trained on the categories that are most likely to be dealt with in a particular campaign, thus obtaining a label on the incoming workitem which best describes its subject matter. It is an API call which sends text to the back-end classifier and receives a response with a category (label) and a confidence of the prediction. See the category summary documentation to understand concretely how this works.

To be able to use this component in the workflow, it is necessary to save the text to analyze in a variable and pass it into the “Content” component. As such, the prediction category is mostly used on text-based workflows like Chat or WhatsApp, though it may also be used on the content of a transcription or a customer-facing survey. The prediction result will be saved in a variable inside of workitem called predictionResult which in turn contains the following three variables: (lowercase letters)

- status: The result of the API call. If all went ok then this would be 200 (integer not string)
- label: The label of the category that was predicted, this is any of the categories listed for training in the summary model.
- confidence: the percentage likelihood that the prediction label was correct as per the trained model.

This component only works on text-based workitems, such as Chat, SMS or Email.



Configuration Fields

When configuring a Predict Category component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Set Workitem Category	Determines whether the label is to be attached to the workitem or if the prediction should skip this. NOTE: the predictionResult variable still holds all the relative data, even if this toggle is not selected. The predicted value will be

	stored in <code>workitem.categoryId</code> and will be the string value of the category's identifier.
Content	The text content as a string format on which the prediction is to be made.
Category Summary	Choose the category summary model that holds the appropriate trained model.



NAME

Predict Category

DESCRIPTION

CONDITION TYPE

x None

SET WORKITEM CATEGORY

☐

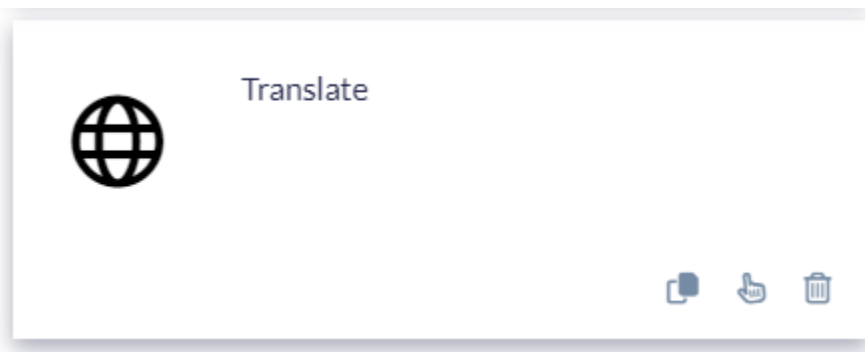
CONTENT

CATEGORY SUMMARY

Close Save & Close Save

The Translate Component

The Translate component translates text from a specified source language into a target language. It uses the basic Google Translate functionality to translate a fixed text from one language to another. It is necessary to know which language the source text is in because the engine will not try to predict it first, so a campaign could have a hard-coded language translation or use the detect language functionality first and then the translate components.



Configuration Fields

When configuring a Translate component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Text	The content which will be translated, may take variables and should be plain text.
Source Language	The language of the content before translation.
Target Language	The language of the content after translation.

The screenshot shows a web interface for configuring a Google TTS component. At the top is a blue header bar with three icons: a menu, a calendar, and a speech bubble. Below the header, the form is organized into sections:

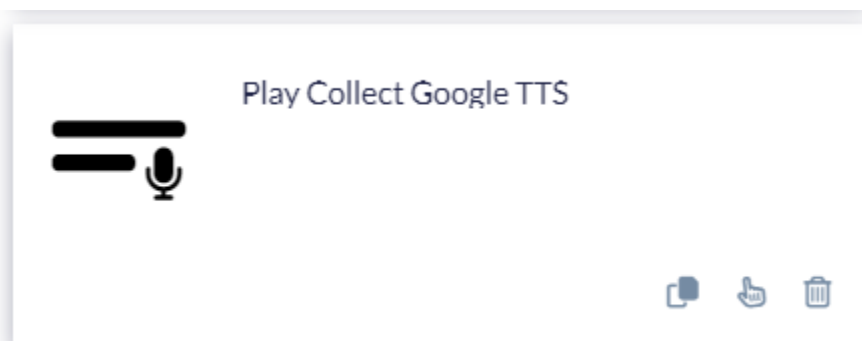
- NAME:** A text input field containing the word "Translate".
- DESCRIPTION:** An empty text input field.
- CONDITION TYPE:** A dropdown menu with "x None" selected.
- TEXT:** An empty text input field.
- SOURCE LANGUAGE:** A dropdown menu with "x Select value..." selected.
- TARGET LANGUAGE:** A dropdown menu with "x Select value..." selected.

At the bottom of the form are three buttons: "Close" (light gray), "Save & Close" (blue), and "Save" (blue).

The Play Collect Google TTS Component

Google TTS is a powerful text-to-speech engine used by Nextiva to create prompts and other spoken messages on the go. This component may take variables as parameters in the text to speak out and has the added advantage of taking SSML tag language to improve the quality of the speech. This is a standard programming tag language and can be used to make synthesized text-to-speech sound more realistic by including pauses in the speech and allowing for the configuration of the pronunciation of numbers as ordinals or fractions in different dialects or even emphasis levels. There is extensive documentation on this [here](#).

This component is a version of the Play and Collect Digits, where a message is played to the end customer where they are prompted to enter digits on their phone's keyboard. These digits are saved in the `workitem.digits` variable and can be used in the following workflow.



Configuration Fields

When configuring a Play Collect Google TTS component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Language	The language in which the text to be synthesized is written.
Gender	The gender of the TTS to be used.
Message	The text that is to be converted and spoken, may take variables from the workflow.
Number Of Digits	The number of digits expected from the customer. The system will stop collecting digits after this limit is reached.
Termination Key	The key that the customer can use to indicate that they have finished typing in the digits.
Timeout In Seconds	The length of time given to the customer to input the digits.
Data Loss Prevention	A boolean (true or false) to specify whether the information that is being

inserted is sensitive and should not be saved in the database.



NAME

Play Collect Google TTS

DESCRIPTION

VOICE

x Select value...

GENDER

x Select value...

MESSAGE

NUMBER OF DIGITS

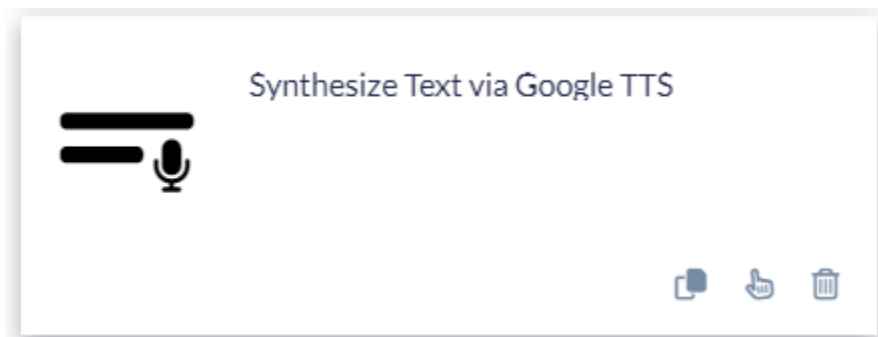
Close Save & Close Save

The Synthesize Text via Google TTS Component

Google TTS is a powerful text-to-speech engine used by Nextiva to create prompts and other spoken messages on the go. This component may take variables as parameters in the text to speak out and has the added advantage of taking SSML tag language to improve the quality of the speech. This is a standard programming tag language and can be used to make synthesised text-to-speech sound more realistic by including pauses in the speech and allowing configurations such as the pronunciation of numbers as ordinals or fractions, in different dialects or even emphasis levels. There is extensive documentation on this [here](#).

This component creates a spoken message prompt. It can be used to fill in variables in between other prompts or can be used to create on the go prompts when specific

warnings or messages need to be created that modify the existing workflow but are not necessarily permanent.



Configuration Fields

When configuring a Synthesize Text via Google TTS Component in the Workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Voice	The language and the gender to be used in the message.
Message	The text (including SSML tags) that is to be synthesized to the customer.

NAME

Synthesize Text via Google TTS

DESCRIPTION

VOICE

×

Select value...

MESSAGE

CONDITION TYPE

×

None

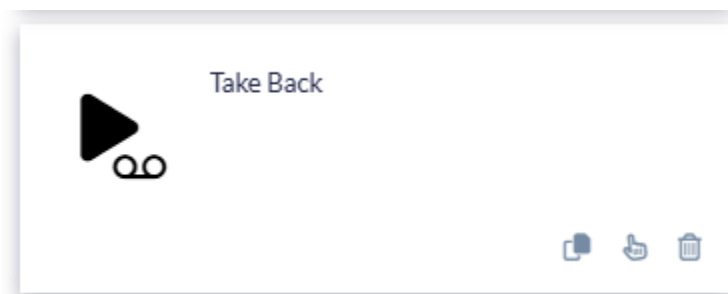
Close

Save & Close

Save

The Take Back Component

This component takes back a call to where it came from when there's an issue transferring it.



Configuration Fields

When configuring a Take Back component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.





NAME

Take Back

DESCRIPTION

CONDITION TYPE

× None ▼

Close

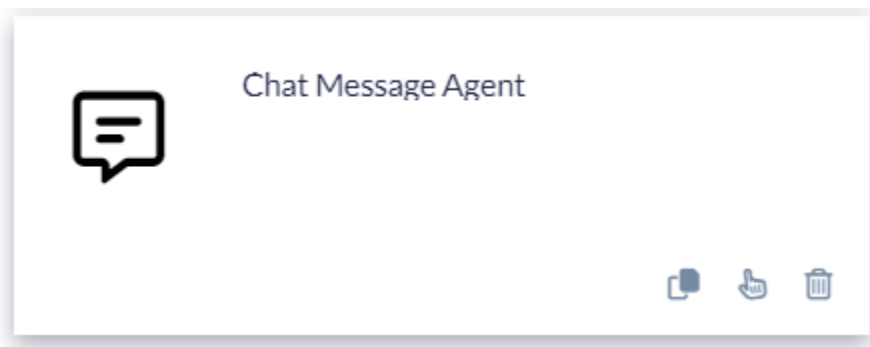
Save & Close

Save

Chat

The Chat Message Agent Component

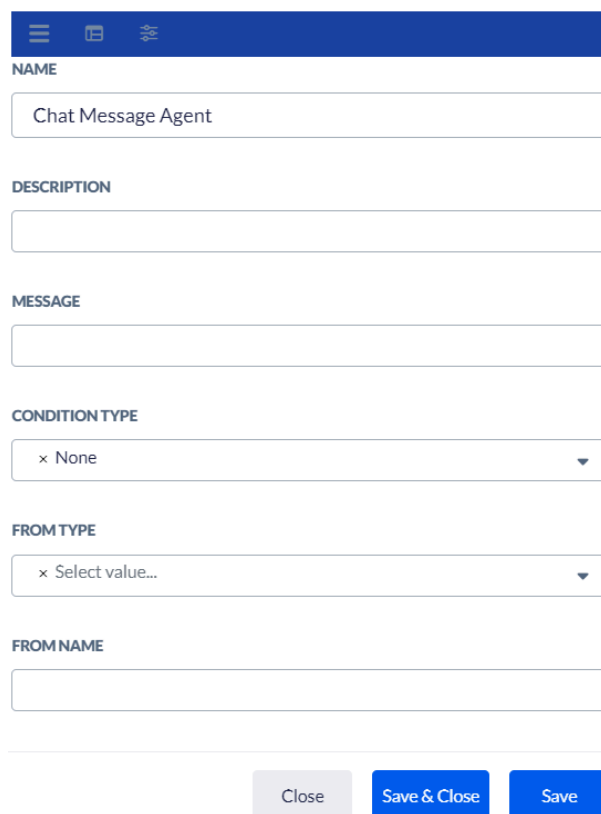
This component is used to send a message to the agent within a chat workitem. This could be presented as a welcome message to the agent when they receive the workitem or during a back and forth conversation with a customer due to triggered conditions. The component may contain variables in the message such as the name or preferences pre-defined in the survey by the customer. This is a way to dynamically display the information that a customer provides in the survey to an agent during the chat.



Configuration Fields

When configuring a Chat Message Agent component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Message	The message to be forwarded to the agent.
From Type	The possible from types are: • Bot • Client • Supervisor
From Name	Depending on what you select it can be a From Type or it can be a variable.



The image shows a configuration form for the 'Chat Message Consumer' component. At the top is a blue header bar with three icons: a menu, a chat bubble, and a speech bubble. Below the header, the form has several fields: 'NAME' with the value 'Chat Message Agent', 'DESCRIPTION' (empty), 'MESSAGE' (empty), 'CONDITION TYPE' with a dropdown menu showing 'x None', 'FROM TYPE' with a dropdown menu showing 'x Select value...', and 'FROM NAME' (empty). At the bottom right, there are three buttons: 'Close' (grey), 'Save & Close' (blue), and 'Save' (blue).

NAME

Chat Message Agent

DESCRIPTION

MESSAGE

CONDITION TYPE

x None

FROM TYPE

x Select value...

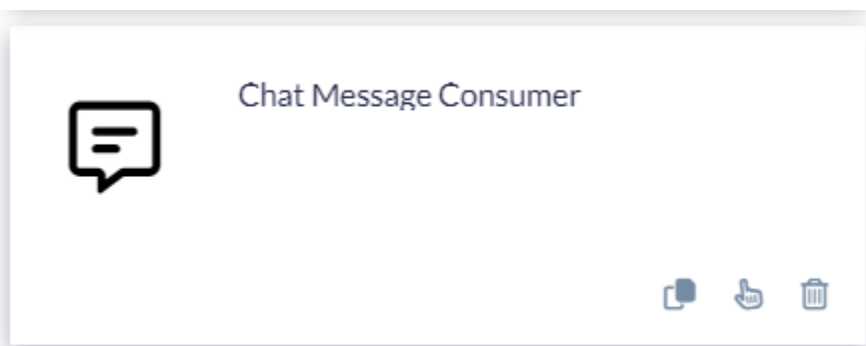
FROM NAME

Close Save & Close Save

The Chat Message Consumer Component

Similar to the Chat Message Agent component. These self-contained messages can be sent to the customer as they interact with the chat. These messages do not come from the agent but rather are defined in the workflow beforehand, allowing the workflow to display initial messages or even options (buttons via the response options field) that they will be able to see and select.

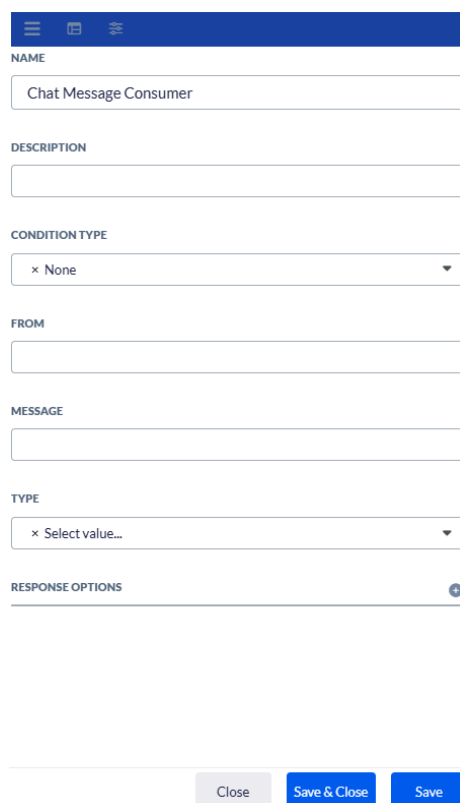
An example would be to use this option if a company works across multiple cities or states and would like to prompt the customer to choose which state they are requesting the chat from.



Configuration Fields

When configuring a Chat Message Consumer component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
From	Name to be displayed by the component when delivering the message to the consumer. (Egs: specialist or Bot)
Message	The content of the message to be displayed, this may include variables.
Type	The type of message. This will set the message as type "User" or "Bot", depending on what type is desired to be registered as the source of the message. (For reporting purposes mainly.)
Response Options	The buttons to be displayed to the customer for them to choose a default response to the message. The response to the message will be seen as a customer type message and should be forwarded to the agent.



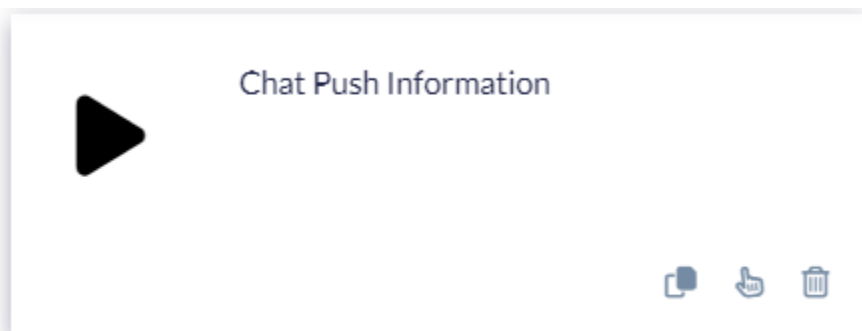
The screenshot shows a configuration form for a chat push message. It has a blue header bar with three icons. The form fields are as follows:

- NAME:** A text input field containing "Chat Message Consumer".
- DESCRIPTION:** An empty text input field.
- CONDITION TYPE:** A dropdown menu with "x None" selected.
- FROM:** An empty text input field.
- MESSAGE:** An empty text input field.
- TYPE:** A dropdown menu with "x Select value..." selected.
- RESPONSE OPTIONS:** A section header with a plus icon to its right.

At the bottom of the form are three buttons: "Close", "Save & Close", and "Save".

The Chat Push Information Component

The Chat Push Information component is used to create messages that can be sent to the customer while they are waiting for an agent to receive the workitem. These push messages can be repeated and looped based on the configuration of the number of seconds given in the content. There are two types of push information: messages and URL, the latter is used to display a waiting page URL to the consumer.



Configuration Fields

When configuring a Chat Push Information component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.
Loop (Optional)	Toggle true or false to have the messages loop across the defined time.
Content (Mandatory)	The messages or URLs that are to be displayed to the customer when they are waiting for an agent to take the workitem. Here, you can define the time in seconds at which they are to be displayed.
Type (Mandatory)	Whether the push information is to be message or URL type.

NAME

Chat Push Information

DESCRIPTION

CONDITION TYPE

×

None

LOOP

CONTENT

+

TYPE

×

Select value...

Close

Save & Close

Save

The Forward Bot Response Component

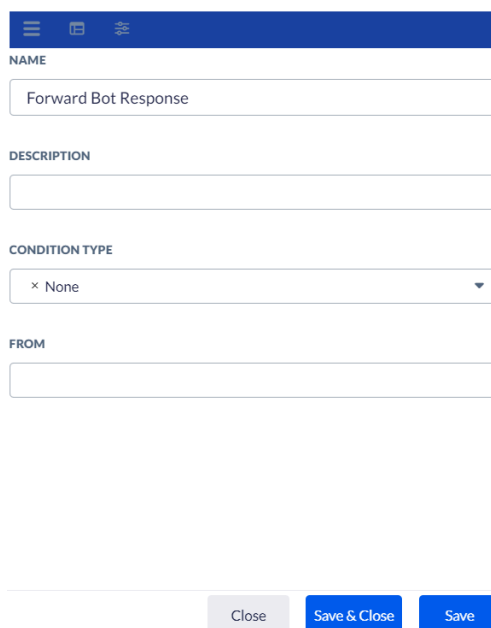
This component is for chat workflows and is used to forward a chat message that has been received by the Message Bot component which communicates with a Dialogflow integration. In this case, if a chat message has been processed by the Message Bot component, then the text sent in the Webhook request can be forwarded to the customer using this component. It is important to understand the flow of a chat campaign (see campaign example) as well as the integrations of Bots in Nextiva.



Configuration Fields

When configuring a Forward Bot Response Component in the workflow, the following fields will be displayed:

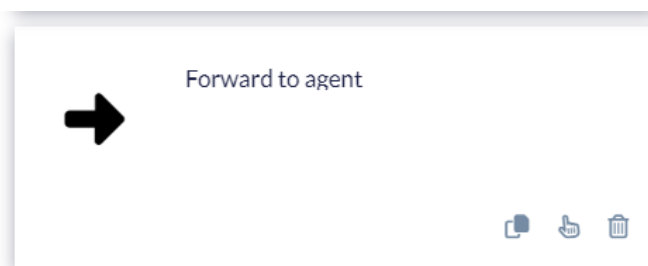
Field Name	Description
Name, Description, (Optional)	The generic fields as seen in the introduction.
From (Mandatory)	The name to be displayed to the customer as the source of the message (eg. specialist, Bot, Dialogflow...).



The screenshot shows a configuration form for a 'Forward Bot Response' component. It features a blue header bar with three icons: a list, a document, and a refresh. Below the header, the form has four sections: 'NAME' with a text input containing 'Forward Bot Response'; 'DESCRIPTION' with an empty text input; 'CONDITION TYPE' with a dropdown menu showing '× None'; and 'FROM' with an empty text input. At the bottom right, there are three buttons: 'Close' (grey), 'Save & Close' (blue), and 'Save' (blue).

The Forward to agent Component

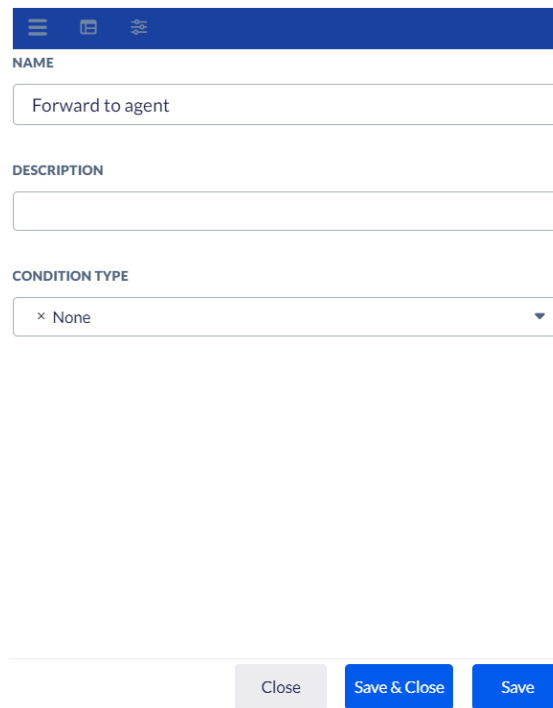
This component is native for chat workflows and is used to forward a chat message that has been received by the wait for chat messages component to the corresponding target. In this case, if a chat message is of type CLIENT then using this component the message is sent to the agent. This component works in conjunction with Wait for Chat Messages.



Configuration Fields

When configuring a Forward to agent component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type(Optional)	The generic fields as seen in the introduction.



NAME

Forward to agent

DESCRIPTION

CONDITION TYPE

x None

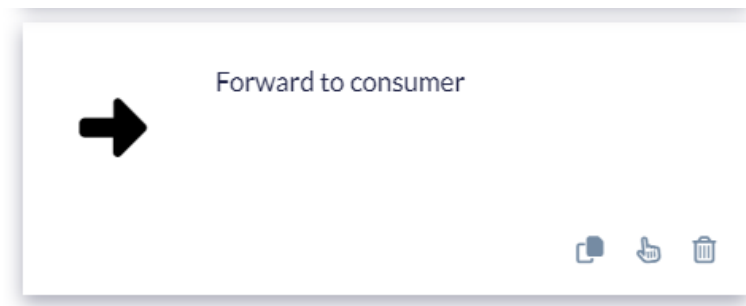
Close

Save & Close

Save

The Forward to consumer Component

This component is for chat workflows and is used to forward a chat message that has been received by the Wait for Chat Messages component to the corresponding target. In this case, if a chat message is of type USER then using this component the message is sent to the customer. It is important to understand the flow of a chat campaign (see campaign example).The Forward to Agent component is used to send the received chat message from the consumer to the agent. This component works in conjunction with the Wait for Chat Messages component.



Configuration Fields

When configuring a Forward to consumer component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type(Optional)	The generic fields as seen in the introduction.

NAME

Forward to consumer

DESCRIPTION

CONDITION TYPE

× None

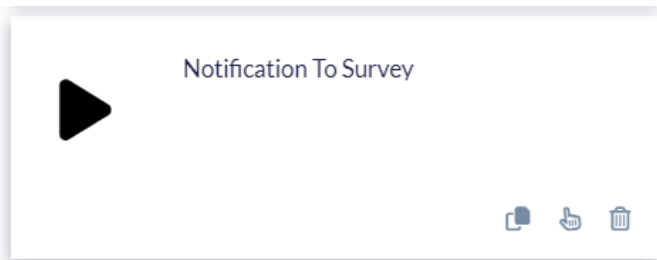
Close

Save & Close

Save

The Notification To Survey Component

This component is used when something happens in the workflow and you want to show it in the survey.



Configuration Fields

When configuring a Notification To Survey component in the Workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Content	A key-value list that will be sent to the survey so that the survey can receive additional data.
Type	Based on something that happens in the workflow you can maximize or minimize the window, send th survey to a different page, terminate the survey, send a pop-up message or you can redirect the survey a URL.
User Survey	Which survey you're going to send the event from the workflow to.
Survey Panel ID	You choose in a drop-down the id of the panel from expression.

Survey From Expression	A variable must be set up to pass that variable to the survey from expression. Put that variable in this field so the correct survey will be passed.
Survey Panel ID From Expression	A variable must be set up to pass that variable to the survey panel ID from expression. Put that variable in this field so the correct survey panel ID will be passed.

NAME

Notification To Survey

DESCRIPTION

CONTENT

TYPE

×

Select value...

CONDITION TYPE

×

None

USER SURVEY

SURVEY PANEL ID

×

Select value...

SURVEY FROM EXPRESSION

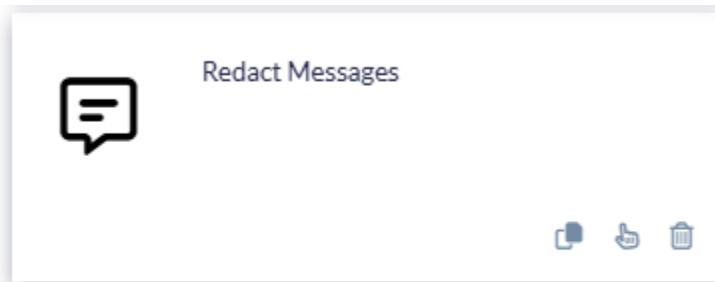
SURVEY PANEL ID FROM EXPRESSION

Close

Save & Close

Save

The Redact Messages Component



Configuration Fields

When configuring a Redact Messages component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.



NAME

Redact Messages

DESCRIPTION

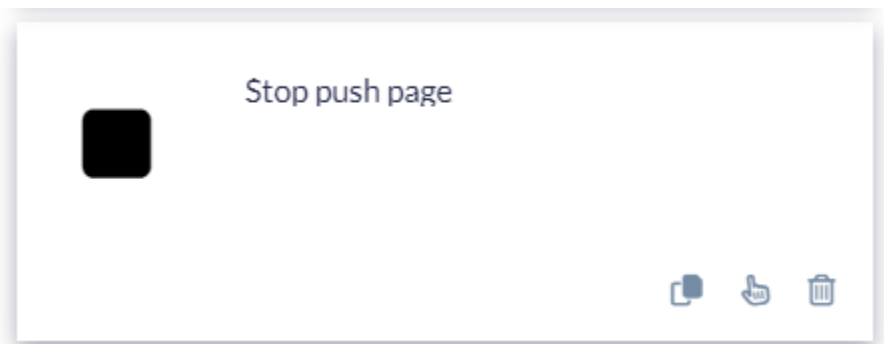
CONDITION TYPE

x None ▼

Close Save & Close Save

The Stop push page Component

This component is used after a Chat Push Notifications component and is used to stop the push notifications when a particular point in the workflow is reached. It is most notably used when the workitem reaches the agent to stop the push messages being sent to the consumer.



Configuration Fields

When configuring a Stop push page component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.

NAME

Stop push page

DESCRIPTION

CONDITION TYPE

× None

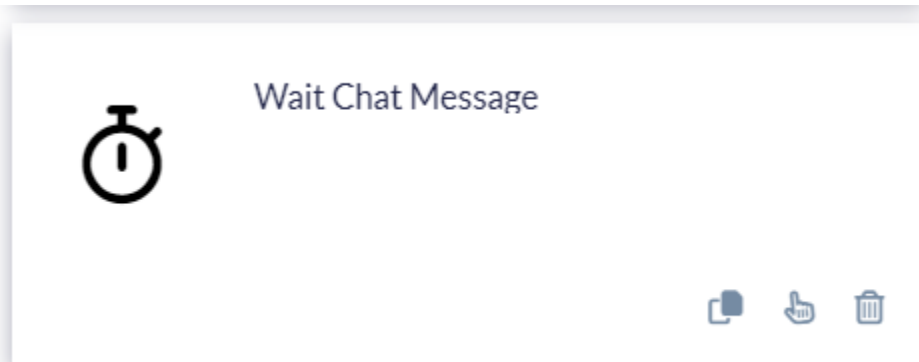
Close

Save & Close

Save

The Wait Chat Messages Component

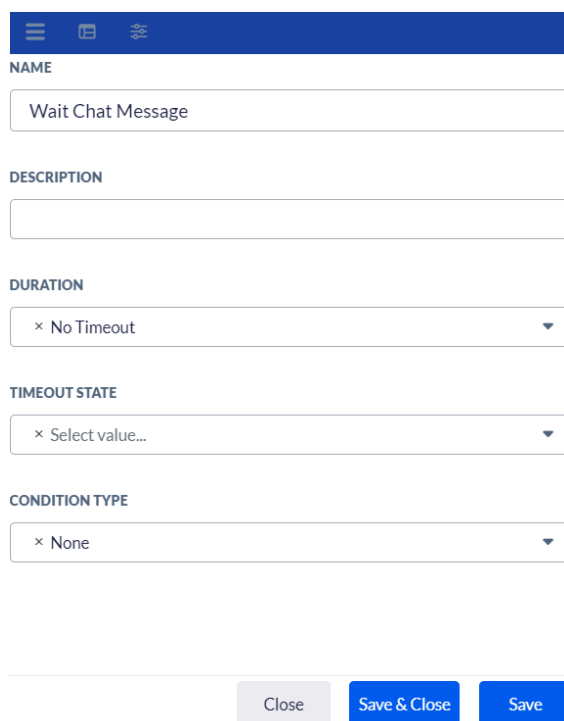
The Wait for Chat Messages component is used to capture Chat messages as they come through the workflow. It is the key component that the Chat functionality rests on and holds the message objects that can then be delivered using the “Forward” component and the properties that are contained inside the message objects. It’s important to note that the message objects will say who the message is from, hold the message text, time and other details.



Configuration Fields

When configuring an Wait Chat Message component in the Workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Duration (Optional)	A time set to wait for the chat message.
Timeout State (Optional)	During this state, a message configured in the Chat Message Consumer Component will be set.



The image shows a web form for adding a lead. It has a blue header bar with three icons: a menu, a calendar, and a speech bubble. Below the header, the form is divided into several sections, each with a label and a corresponding input field or dropdown menu. The sections are: NAME (text input with 'Wait Chat Message'), DESCRIPTION (text input), DURATION (dropdown menu with 'No Timeout'), TIMEOUT STATE (dropdown menu with 'Select value...'), and CONDITION TYPE (dropdown menu with 'None'). At the bottom right, there are three buttons: 'Close' (grey), 'Save & Close' (blue), and 'Save' (blue).

NAME

Wait Chat Message

DESCRIPTION

DURATION

× No Timeout

TIMEOUT STATE

× Select value...

CONDITION TYPE

× None

Close Save & Close Save

Contact

The Add Lead Component

The Add Lead component is used to add a new lead into an existing list in a Predictive or Progressive campaign via the workflow. The Lead field can be used to add the specific details of the lead to the schema (template) taking a label and a value. The labels should be equivalent to the field names in the contact schema and the values should be the lead details that are to be created and added to the new lead object.

LEAD

+

firstName	workitem.data.firstName	
lastName	workitem.data.lastName	
phone	workitem.data.phone	
email	workitem.data.email	
state	workitem.data.state	

This component is most useful in a customer-facing webform campaign. A permanently running list can be included in this campaign and then customers can add their details via a website form (using a customer facing survey) which then generates a new lead. This campaign will therefore have a running list of leads that customers can add themselves to for agents to call them.

Configuration Fields

When configuring an Add Lead component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
List(Mandatory)	Select which list to add the lead into from the list icon.
Lead(Mandatory)	Specify the field in the table as well as the value that should be placed into the field.

NAME

Add Lead

DESCRIPTION

LIST

LEAD

+

CONDITION TYPE

× None

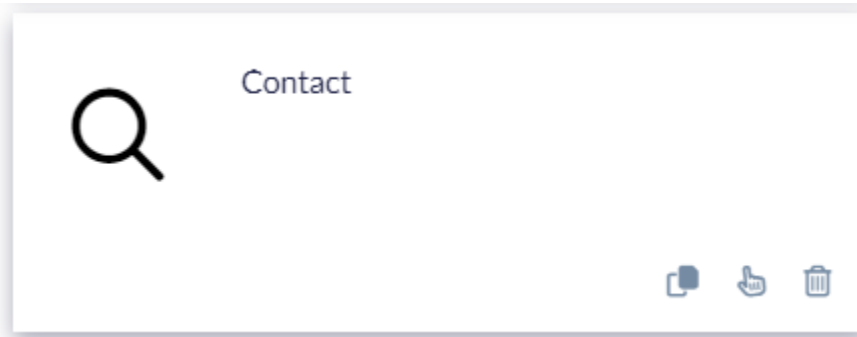
Close

Save & Close

Save

The Contact Component

The Contact component is used to load the contact record based on the information received from the workitem. When using an external contact table, outside of the Nextiva system, it is possible that the request may take a few seconds. If this is the case it is recommended that Play Prompt Async or Play Music components are used just prior to using the Contact component so that the caller will listen to the prompt or music while the system performs the lookup.



Configuration Fields

When configuring a Contact component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Search (Mandatory)	Specify the information the system should search to perform the lookup in the contact table.

NOTE: If you would want the system to lookup the contact record from an incoming call or SMS:

- Set the Condition to: None.
- Set the Search to: workitem.from workitem.from is the variable that contains the customer's phone number.

NAME

Contact

DESCRIPTION

CONDITION TYPE

x None

SEARCH

Close

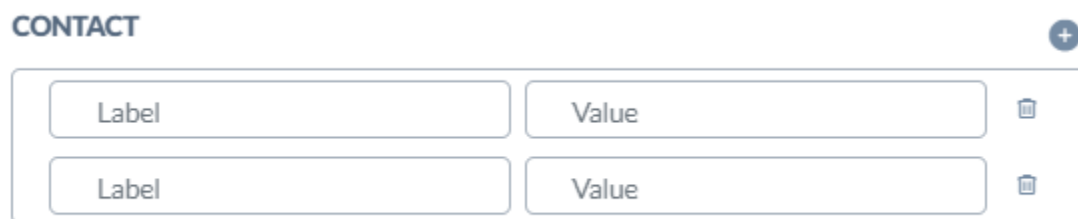
Save & Close

Save

The Create Contact Component

The Create Contact component is used to add a new contact record to the contact table through the workflow. It is necessary to build a JSON object with all the fields that are required to be added to the contact. Some items, such as the phone number or email address, that come in from a customer-facing survey, will be added automatically, but for many other basic items such as First and Last Name it would be necessary to have prompted the customer to provide them. How a contact is created will depend entirely on the type of workflow that is created, and not all fields in a contact form need filling out.

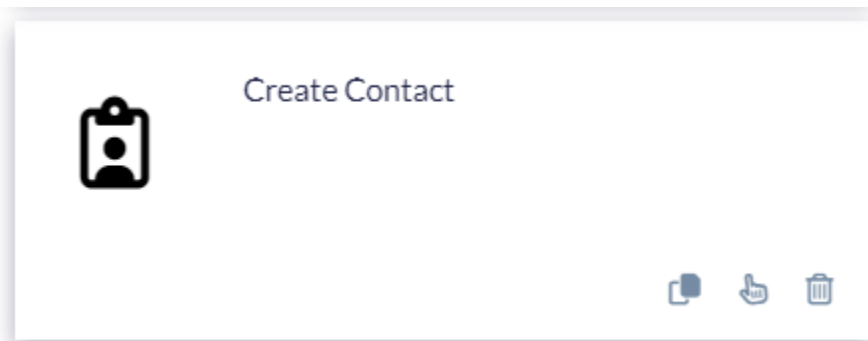
The component includes a contact section:



CONTACT		
Label	Value	🗑️
Label	Value	🗑️

The fields to be filled out here are label (fieldname) and value (the value of the contact field). They will determine what is to be inserted in the contact record.

Following on from the Add Lead component example, these leads that add themselves to a list could also be added into the contact table to maintain a record of these.



Configuration Fields

When configuring a Create Contact component in the workflow, the following fields will be displayed:

Field Name	Description
------------	-------------

Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Contact (Mandatory)	The fields and values of the contact schema that will be inserted into the new contact record.

NAME

Create Contact

DESCRIPTION

CONDITION TYPE

x None

CONTACT

Close

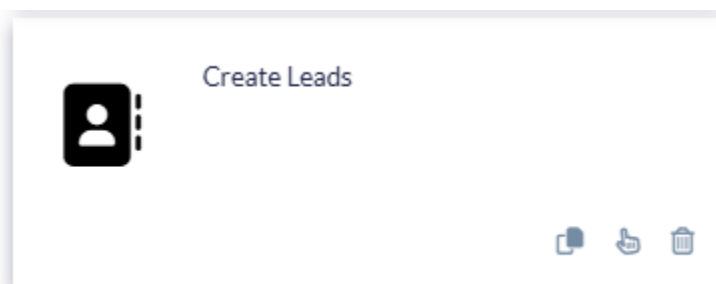
Save & Close

Save

The Create Leads Component

The Create Leads component modifies leads in an existing list in Nextiva Contact Center.

KNOWN ISSUE: This needs to be verified.



Configuration Fields

When configuring a Create Leads component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
List	The list that you want to add the lead to. Click the file to choose the list.
Leads	The leads you want to modify.
Variable Name	The name of the field you want to modify.
Upsert	If enabled, existing leads will be modified.



NAME

Create Leads

DESCRIPTION

LIST

LEADS

VARIABLE NAME

UPSERT

☐

CONDITION TYPE

× None

Close

Save & Close

Save

The Get Consent Component

The Get Consent component is used to look at the current consent setting for the number specified in the Thrio native consent table. It is used to check what permission a contact has given for communication on a particular address of theirs. The consent is necessary in functions that may be assigned in a Dialer Action result.

For example: A lead may be dialed by the system and reaches an answering machine. The system may be set up to send an SMS to this lead if the answering machine is

reached, however the SMS must not be sent if the consent given by that contact forbids it on that address.

When you pass a number in the component, a result will be returned if the number is in the database, otherwise nothing is returned.

Then, using `workitem.commConsent.commType` you can check the Consent Type. This component, will search the consent table and return the following object under `workitem`, to check if the consent type you can do `workitem.commConsent.commType`:

```
{
  "reason": "userId: 616d99281c3b697d65479efb",
  "address": "joe@email.com",
  "contactId": "",
  "modifiedAt": 1670340201554,
  "transactionId": "",
  "objectType": "commconsent",
  "createdAt": 1670340201554,
  "expiredAt": "",
  "deletedAt": 0,
  "createdBy": "616d99281c3b697d65479efb",
  "commType": -41,
  "id": "1896177a-a807-4142-b43f-711ac96f29fe",
  "_id": "1896177a-a807-4142-b43f-711ac96f29fe"
}
```

The possible values are:

DNC: -108

Expired: -39

Opt-In: 33

Opt-Out All: -37

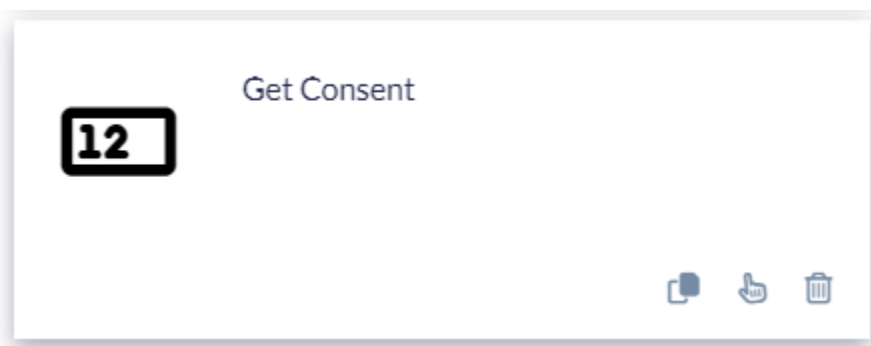
Opt-Out Email: -41

Opt-Out Phone: -34

Opt-Out SMS: -36

Pending: -38

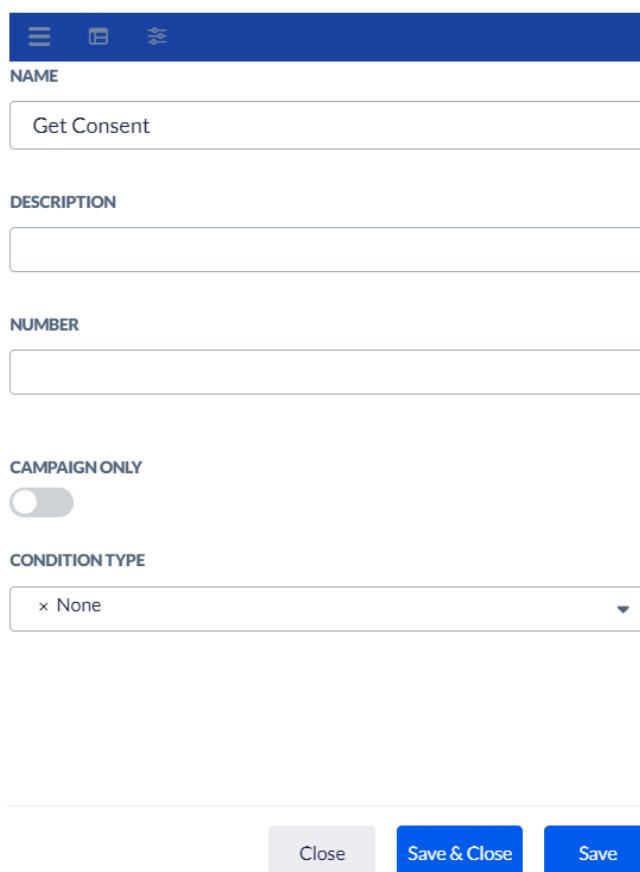
Reassigned: -35



Configuration Fields

When configuring a Get Consent component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Number (Mandatory)	The address for which consent is to be searched on.
Campaign Only	Getting consent for the campaign you're presently on or across all campaigns.



The image shows a configuration form for the 'Get Leads Attempt' component in Nextiva. The form has a blue header bar with three icons: a menu, a calendar, and a settings icon. Below the header, the form is divided into several sections: 'NAME' with a text input field containing 'Get Consent'; 'DESCRIPTION' with a text input field; 'NUMBER' with a text input field; 'CAMPAIGN ONLY' with a toggle switch that is currently off; and 'CONDITION TYPE' with a dropdown menu showing 'x None'. At the bottom of the form, there are three buttons: 'Close', 'Save & Close', and 'Save'.

NAME

Get Consent

DESCRIPTION

NUMBER

CAMPAIGN ONLY

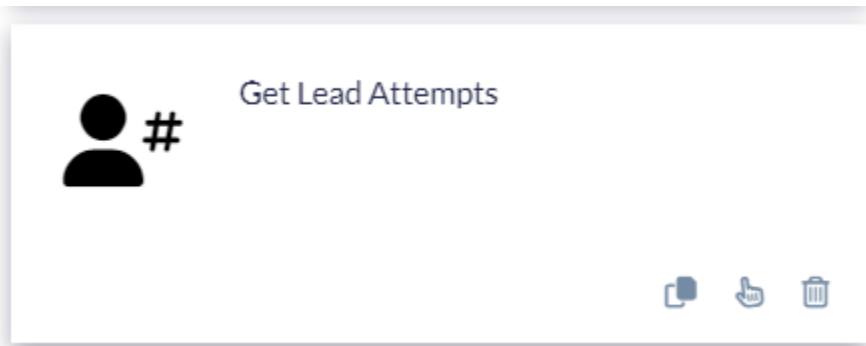
CONDITION TYPE

x None

Close Save & Close Save

The Get Leads Attempt Component

Some Nextiva workflows, such as functions in the dialer actions, may need to carry out different actions on a lead based on how many communication attempts have been carried out. For example; if a lead is dialed and the call reaches the customer's answering machine, the dialer may make an attempt at leaving a voicemail detailing the reason for the communication. However, a callback that is carried out and reaches the lead's answering machine a second time, may not want to leave a second voicemail. This component allows the workflow that would drop the voicemail to check whether a previous attempt reached the answering machine and left a voicemail, so as not to repeat the action. This component is primarily used in this type of function as lead attempts are related to outbound dialers. The Get Lead Attempts component will save a JSON map of the previous attempts made.



Configuration Fields

When configuring a Get Lead Attempts component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Variable Name (Mandatory if returning a result)	The name of the variable in data where the total number of attempts is to be saved.



NAME

DESCRIPTION

VARIABLE NAME

CONDITION TYPE

× None 

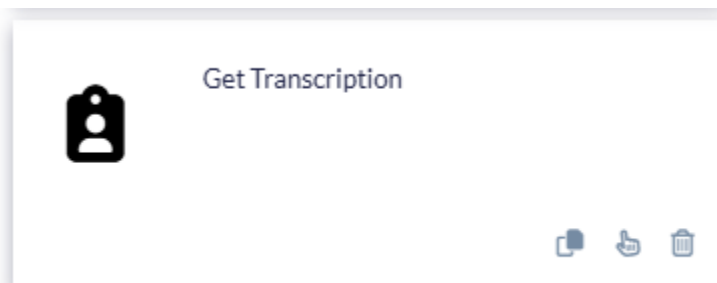
Close

Save & Close

Save

The Get Transcription Component

This component allows an administrator to get the transcription using a function on disposition, if the transcription is sent to a third-party system.



Configuration Fields

When configuring a Get Transcription component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

NAME

Get Transcription

DESCRIPTION

CONDITION TYPE

× None

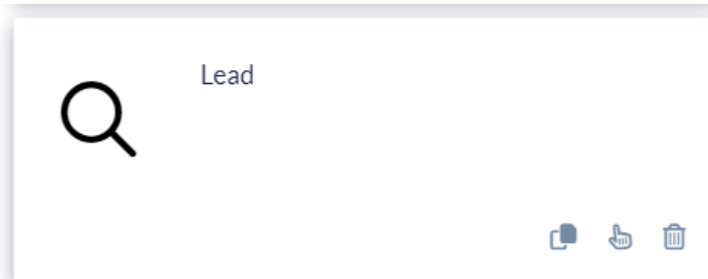
Close

Save & Close

Save

The Lead Component

The Lead component allows you to search for a lead in Nextiva Contact Center, based on workitems associated with leads in history.

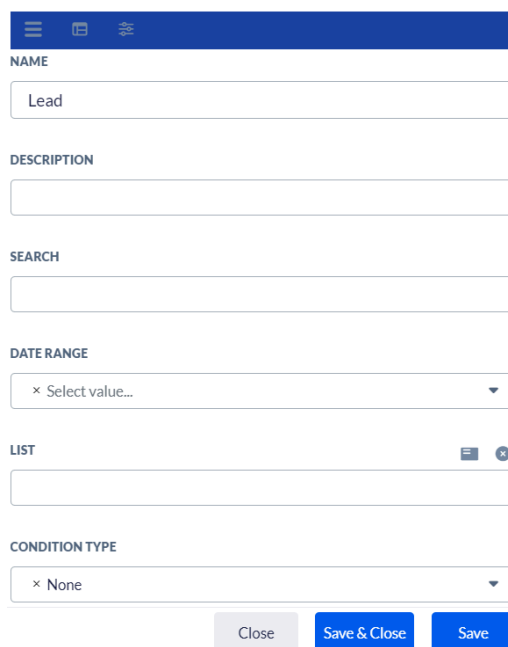


NOTE: There must have been an attempt to contact the lead to use this component.

Configuration Fields

The Lead component will have the following configuration fields:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Search (Mandatory)	Specify what NCC should use to search for the lead, for example, the number of the customer should be: workitem.from.
Date Range (Mandatory)	The date range to search on.
List	The ID of the list that you want to search.



A screenshot of a configuration form for a lead component. The form has a blue header bar with three icons: a menu, a document, and a filter. Below the header, there are several input fields and dropdown menus. The fields are labeled: NAME (with the value 'Lead'), DESCRIPTION, SEARCH, DATE RANGE (with a dropdown menu showing 'x Select value...'), LIST (with a dropdown menu showing 'x None'), and CONDITION TYPE (with a dropdown menu showing 'x None'). At the bottom right, there are three buttons: 'Close', 'Save & Close', and 'Save'.

The Leads Attempt Count Component

This component returns a total count of the number of attempts that have been carried out on a particular lead. This includes all attempts on different addresses that have been performed in the current list on that lead. This component is useful in both Update Lead and Lead Attempts functions where it is important to understand what actions have been carried out. Using this information the Lead update component can create callbacks, or finish the lead depending on the workflow.



Configuration Fields

When configuring a Lead Attempts Count component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Variable Name (Mandatory if returning a result)	The name of the variable in data where the total number of attempts is to be saved.



NAME

DESCRIPTION

VARIABLE NAME

CONDITION TYPE

× None ▼

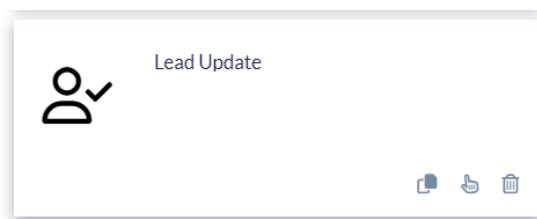
Close

Save & Close

Save

The Lead Update Component

The NCC dialer has built-in capabilities for callbacks and functions when it reaches an answering machine or a busy signal. The function component allows custom actions to be built and the Lead Update component is a key piece here. This component can be used in the workflow of a function to update the status of the lead to remove the lead from lists or multiple types of callbacks, such as next day morning or two day random. The component can take conditions based on the number of attempts.



Configuration Fields

When configuring a Lead Update component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Select Callback Time (Mandatory)	Select when this lead should be called back.
Set Callback Time In Minutes (Optional)	Manually type in when this lead should be called back.
Action (Mandatory)	Select the action that will be taken on this lead.
Disposition (Mandatory)	Select the disposition icon to assign one to this workitem from the list of available dispositions.
Priority (Optional)	Set a new priority on the lead after this workitem's attempt.

NOTE: The lead must have been dialed at least once in order for the update to work.

NAME

Lead Update

DESCRIPTION

SELECT CALLBACK TIME

×

Select value...

SET CALLBACK TIME IN MINUTES

ACTION

×

Select value...

DISPOSITION

PRIORITY

CONDITION TYPE

×

None

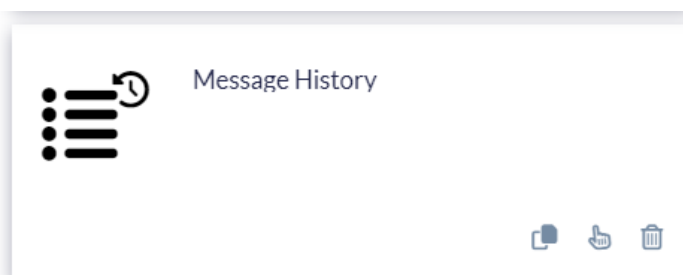
Close

Save & Close

Save

The Message History Component

This component is used to load the list of previous workitems from the contact's history.



Configuration Fields

The Message History component will have the following fields:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Query (Mandatory)	The variable to query the history table on. Most often the contact identifier, phone or email address.
Media Type (Mandatory)	The range of days to search on.
Date Range (Optional)	The prompt that contains the initial menu options.



NAME

DESCRIPTION

QUERY

MEDIA TYPE

× Select value... ▼

DATE RANGE

× Select value... ▼

CONDITION TYPE

× None ▼

Close

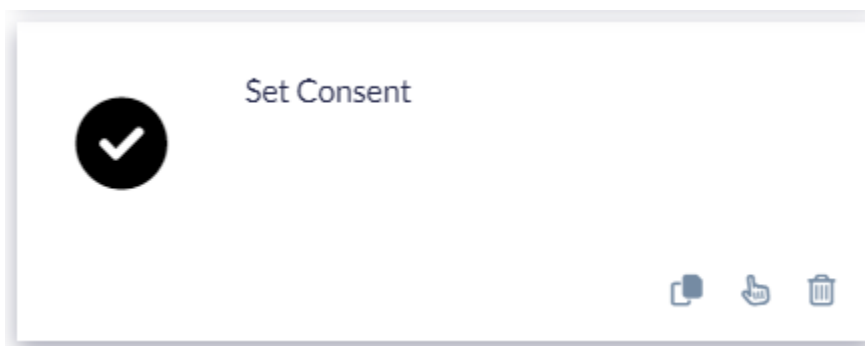
Save & Close

Save

The Set Consent Component

Nextiva has a native consent table for companies to record the consent of on different addresses. Use this component to dynamically set the consent in this table for the

address on the current workitem. For example: This component can be used in IVRs to give the option to a customer to set the consent for their phone number.



Configuration Fields

When configuring a Set Consent component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Consent Type (Optional)	The type of consent.
Number (Mandatory)	The address for which consent is to be set.
Contact Id (Mandatory)	The contact identifier if it is to be linked to the consent.
Response Variable (Mandatory)	The variable in which to save the response of the set consent API call.
Campaign Only	Enable if you want to set consent for a particular campaign, instead of the entire tenant.

NAME

Set Consent

DESCRIPTION

CONSENT TYPE

× Select value...

NUMBER

CONTACT ID

RESPONSE VARIABLE

CAMPAIGN ONLY

CONDITION TYPE

× None

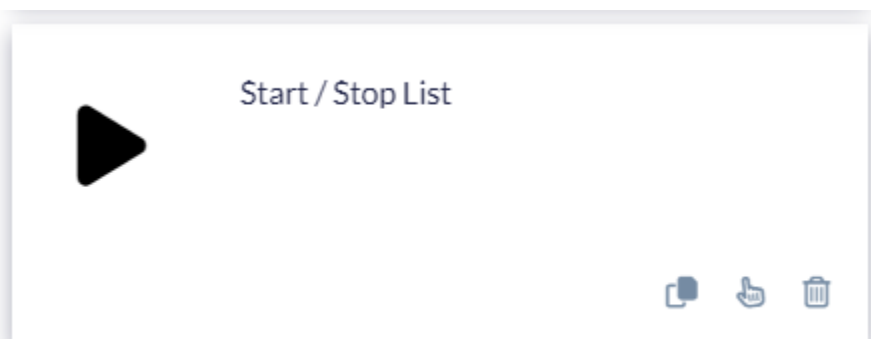
Close

Save & Close

Save

The Start/Stop List Component

The Start/Stop List component allows you to start or stop a Progressive/Predictive/ or QB list through a workflow. This means that functions can take control of the stopping and starting of the list to save an administrator from having to do this. It can be used at the end of list dials or when certain business event times are reached.



Configuration Fields

When configuring a Start/Stop List component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
List (Mandatory)	Select the list to Start or Stop from the dropdown.
Start/Stop List (Mandatory)	If disabled, the selected list will start running. If enabled, the selected list will stop running.

NAME

Start / Stop List

DESCRIPTION

LIST

START / STOP LIST

☐

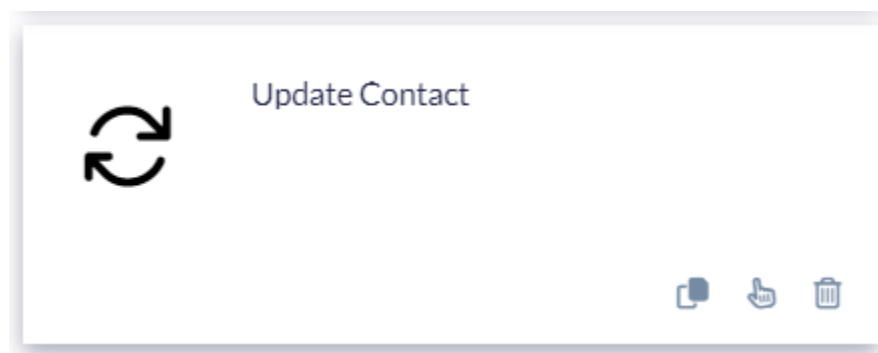
CONDITION TYPE

x None

CloseSave & CloseSave

The Update Contact Component

The Update Contact component is used to update a contact record through the workflow. For this, the contact identifier will be necessary (can be acquired through a contact search on the address) and the fields to be updated will need to be added. Often it is useful to have saved variables with all of the necessary information prior to calling this component.



Configuration Fields

When configuring an Update Contact component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Contact (Mandatory)	Click the '+' to modify the values to existing fields in a contact record. Label corresponds to the fieldname and value is the new value to be inserted in that field.
Contact ID (Mandatory)	Enter the ID of the contact to be updated.

NAME

Update Contact

DESCRIPTION

CONDITION TYPE

x None

CONTACT

CONTACT ID

Close

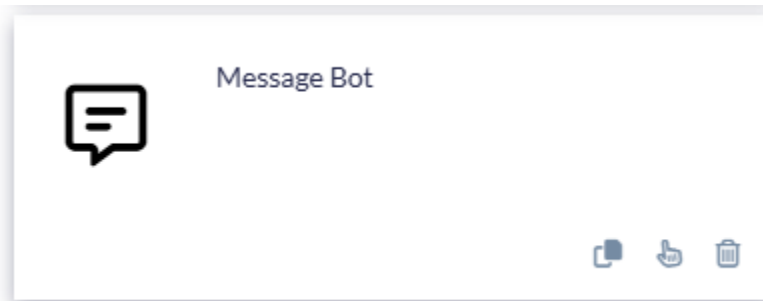
Save & Close

Save

Dialogflow

The Message Bot Component

A message bot sends text to a configured bot. This bot will decide upon a response based on the content it receives and add it to the workitem, the Request that comes in will be of a different format depending on the AI integration selected in the AI service field. This Request has a message that can then be forwarded to the customer using the 'Forward Bot Response' actions. This is the key component of all text-based Bot integrations and is the only way to send a customer message to the Bot. Must always be preceded by a Wait for Messages Component as this expects the customer to send a reply. See the Bot Documentation for better understanding.



Configuration Fields

When configuring a Message Bot component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Context (Mandatory)	For use with IBM Bots that allow context to be saved.
Message (Mandatory)	The content which the Bot will be responding to. This should be the content of either an SMS or Chat message in the variables: <code>`workitem.currentSMSMessage.textMsg`</code> <code>`workitem.currentChatMessage.textMsg`</code>

Event (Mandatory)	An event which should occur to force the bot to respond in a particular fashion. Currently only used with Dialogflow bots. This should be the exact text matching the Event in a Dialogflow Intent
AI Service (Mandatory)	The configured AI Service that defines the connection to the Bot that is being used in the integration.





NAME

Message Bot

DESCRIPTION

CONDITION TYPE

x None

CONTEXT

MESSAGE

EVENT

AI SERVICE

Close Save & Close Save

The Response to Dialogflow Component

The Response to Dialogflow Component sends a response to the Dialogflow bot, to be said to the customer. This response is used only in Telephony integrations of Dialogflow

and will define the text to be pronounced back to the customer. Alternatively a specific intent may be triggered in the Bot which contains its own Response by using the Event field. This takes the exact text matching the name of the Event that triggers the necessary Intent. Either the Response or the Event field is used, not both.



Configuration Fields

When configuring a Response to Dialogflow component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Webhook Response JSON	This is the JSON response that will be sent to Google.

NAME

Response to Dialogflow

DESCRIPTION

WEBHOOK RESPONSE JSON

1

2

3

4 |

CONDITION TYPE

× None

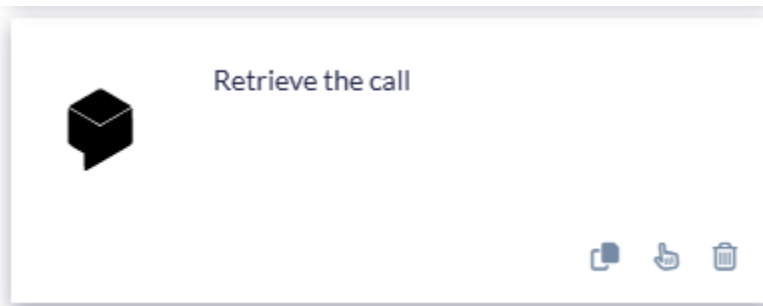
Close

Save & Close

Save

The Retrieve the call Component

The Retrieve the call sends a response to Dialogflow to terminate the Telephony gateway connection, and brings back the call into the NCC workflow to connect to an agent.



Configuration Fields

When configuring a Retrieve the call component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

NAME

Retrieve the call

DESCRIPTION

CONDITION TYPE

×

None

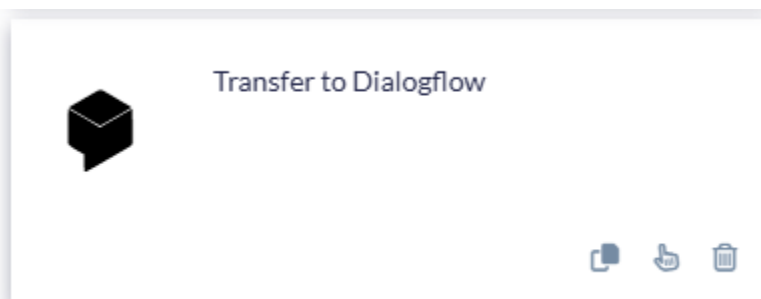
Close

Save & Close

Save

The Transfer to Dialogflow Component

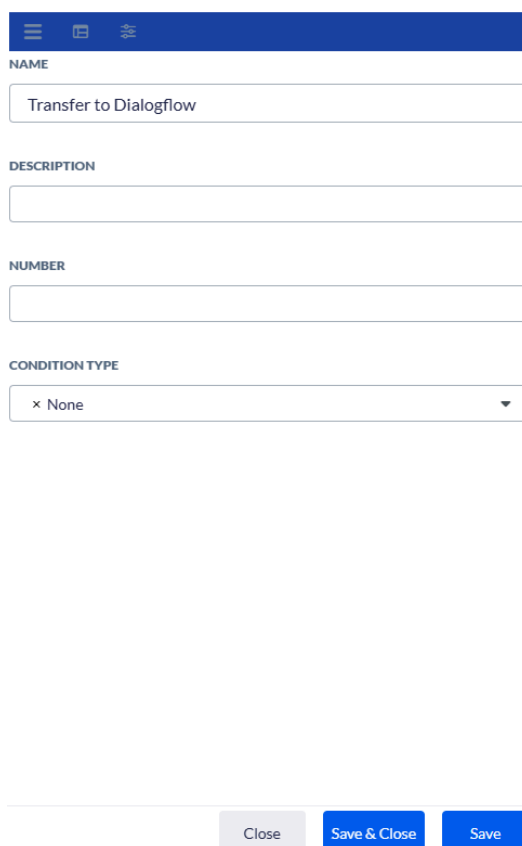
This is the listening component. It waits for a request to be received via the Webhook and then handles saving it in `workitem.data`.



Configuration Fields

When configuring a Transfer to Dialogflow component in the workflow, the following fields will be displayed:

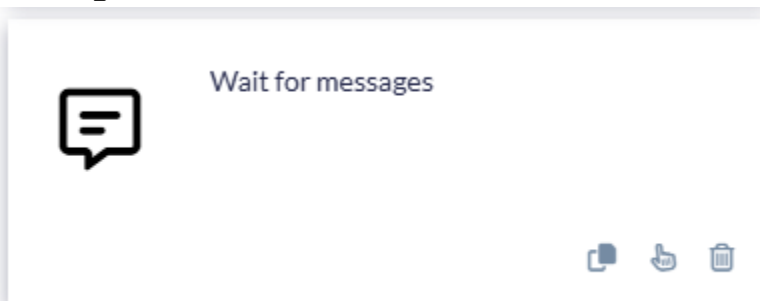
Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Number (Mandatory)	The number of the Dialogflow telephony gateway. This is configured in the 'Integrations' section of the Dialogflow console.



A configuration form for a 'Transfer to Dialogflow' component. The form has a blue header bar with three icons: a list, a document, and a settings gear. Below the header, there are four labeled input fields: 'NAME' (containing 'Transfer to Dialogflow'), 'DESCRIPTION' (empty), 'NUMBER' (empty), and 'CONDITION TYPE' (a dropdown menu showing 'x None'). At the bottom of the form, there are three buttons: 'Close' (grey), 'Save & Close' (blue), and 'Save' (blue).

The Wait for Messages Component

This is the listening component. It waits for a request to be received via the Webhook and then handles saving it in `workitem.data`



Configuration Fields

When configuring a Wait for Messages component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

NAME

Wait for messages

DESCRIPTION

CONDITION TYPE

× None

Close

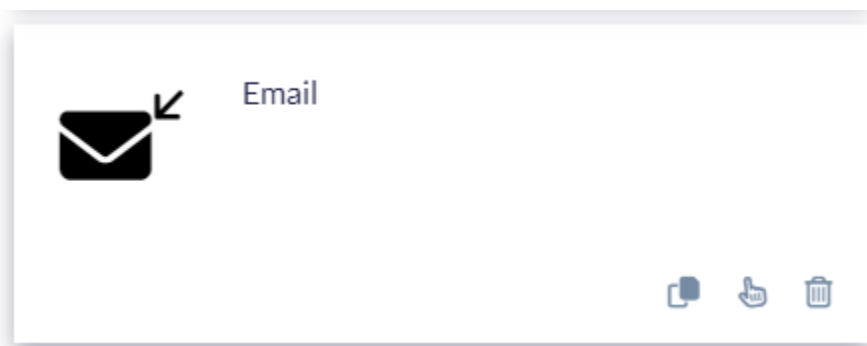
Save & Close

Save

Email

The Email Component

The Email component is used to create an inbound email. This creates a new email workitem and is most often used from a web form where a customer sends an inbound email from the company website. However it can be used in any scenario where an email needs sending to a queue such as confirmation of payment, creation of an order and many others.



Configuration Fields

When configuring an Email component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Body (Optional)	The body of the email. Normally passed via a text variable saved prior (such as from a survey webform text-area component).
Address (Mandatory)	The address from which the email appears to have come (customers' email in the webform).
Queues (Mandatory)	The queues to which to send the inbound email workitem.
Subject (Optional)	The subject matter of the email. (Text or variable.)

NAME

Email

DESCRIPTION

BODY

CONDITION TYPE

× None

ADDRESS

QUEUES

CloseSave & CloseSave



BODY

CONDITION TYPE

× None ▼

ADDRESS

QUEUES  

SUBJECT

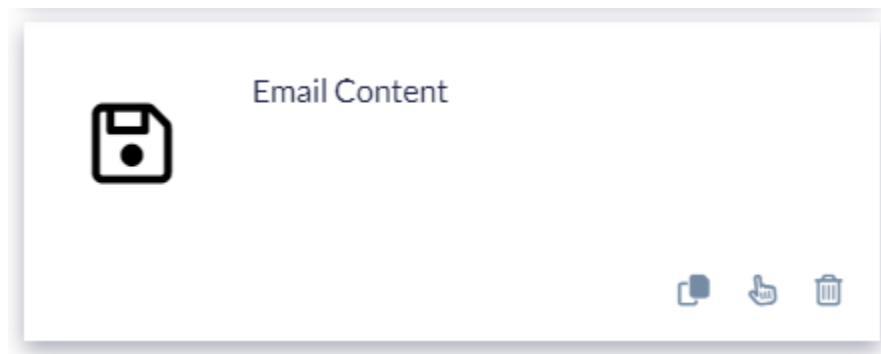
Close

Save & Close

Save

The Email Content Component

This component is used in inbound email workflows. It saves the body of the inbound email in a variable for later use in the workflow. Some examples include classification, dynamic routing or text-to-speech.



Configuration Fields

When configuring an Email Content component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Variable Name (Mandatory if returning a result)	The name of the variable in which the content is to be saved.



NAME

Email Content

DESCRIPTION

VARIABLE NAME

CONDITION TYPE

× None ▼

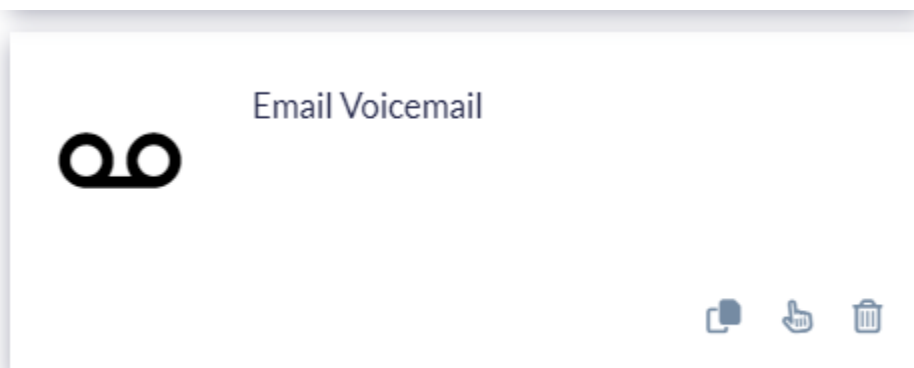
Close

Save & Close

Save

The Email Voicemail Component

This component is used to email the recording of a conversation to a target address at the end of the workflow. It can be used to deliver voicemail recordings or IVR recordings to the inbox of the agent that last handled the item.



Configuration Fields

When configuring an Email Voicemail component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Transcription	If enabled, a transcript of the voicemail will be sent along with the link to the recording.
Attachment	If enabled, an attachment that contains the recordings will be sent along with the link to the recording.
Recording Variable (Mandatory)	The variable that holds the recording.

NAME

Email Voicemail

DESCRIPTION

TRANSCRIPTION

☐

ATTACHMENT

☐

RECORDING VARIABLE

CONDITION TYPE

× None

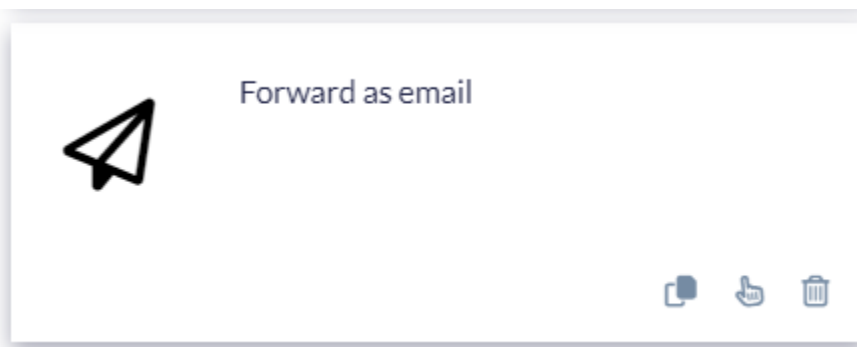
Close

Save & Close

Save

The Forward as email Component

This component forwards a workitem object as the body of an email to a particular email address. This can be used to forward the content of a chat workitem upon termination for review to the customer. Mostly this component will be placed in a workflow's End State. It creates a separate email workitem (important for reporting purposes).



Configuration Fields

When configuring a Forward as email component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Disposition (Mandatory)	The disposition to assign to this email workitem.
From (Mandatory)	The from email address, usually internal company email.
Subject (Optional)	The subject of the email.
To (Mandatory)	The address to which this email is to be delivered.

NAME

Forward as email

DESCRIPTION

CONDITION TYPE

× None

DISPOSITION

FROM

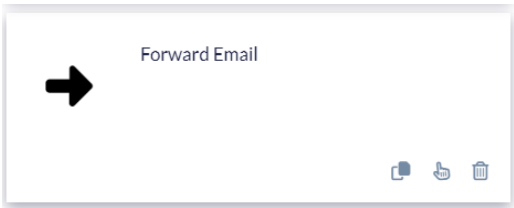
SUBJECT

TO

CloseSave & CloseSave

The Forward Email Component

The Forward Email component forwards an email from a workflow to a specified recipient.



Configuration Fields

When configuring a Forward Email component, the following fields will be displayed:

Field Name	Description
------------	-------------

Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Forward Email from Campaign Inbound Email address (Mandatory)	Enable, if you need to change the from address to the one assigned in the campaign. Otherwise it will use the from email address of the inbound email.
Subject (Optional)	The subject of the email.
To (Mandatory)	The address to which this email is to be forwarded to.
Forward Attachments (Optional)	Enable, if you need to forward the attachments.
Disposition (Optional)	The disposition to assign to this inbound email workitem. An agent disposition will override this. This should be used in case no agent is assigned to the workitem.

NAME

Forward Email

DESCRIPTION

FORWARD EMAIL FROM CAMPAIGN INBOUND EMAIL ADDRESS

☒

SUBJECT

TO

FORWARD ATTACHMENTS

☒

DISPOSITION

CONDITION TYPE

× None

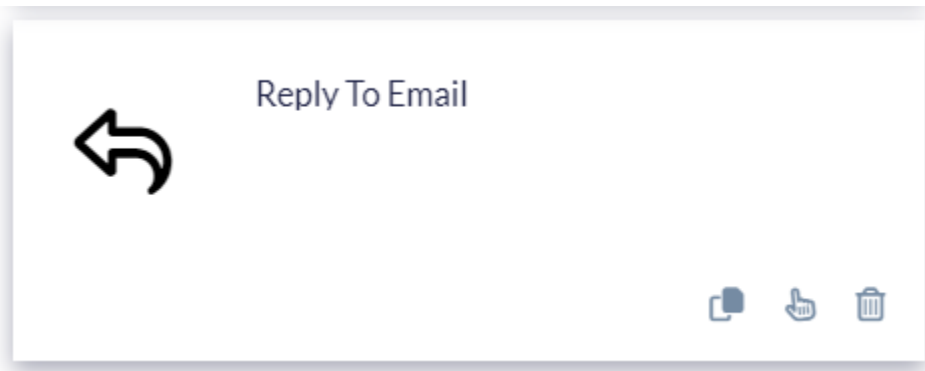
Close

Save & Close

Save

The Reply To Email Component

The Reply To Email component is used to set up automated email replies to inbound email workitems. Often used at the start of a workflow, this component is used to send an email template reply. The email is automatically sent to the incoming address and as such should only be used in email workflows.



Configuration Fields

When configuring a Reply To Email component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Body Template (Mandatory)	The identifier of the template to be used.



NAME

Reply To Email

DESCRIPTION

CONDITION TYPE

× None

BODY TEMPLATE

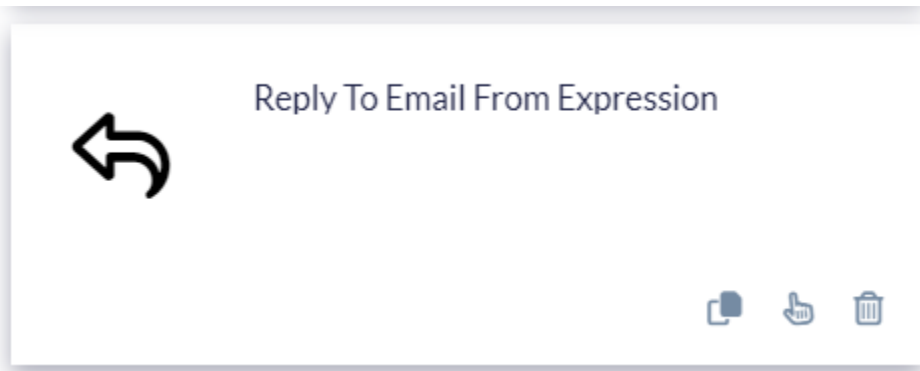
Close

Save & Close

Save

The Reply To Email From Expression Component

Similar to the Reply To Email component, this one is used to send an automated reply to an incoming email. The difference in this case is that the identifier of the email template can be passed as a variable rather than picking it from the list. This component can be used to dynamically send different replies based on the variable that is passed. For example, an incoming email may be passed through a classifier that determines whether it is a sales, tech support or billing inquiry, and based on the result a variable is set with that label. This variable can then be used to pass the corresponding template identifier for the appropriate automated reply.



Configuration Fields

When configuring a Reply to Email From Expression component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Email Template ID (Mandatory)	The identifier of the template to be used. Can be passed as a variable.

NAME

Reply To Email From Expression

DESCRIPTION

CONDITION TYPE

× None

EMAIL TEMPLATE ID

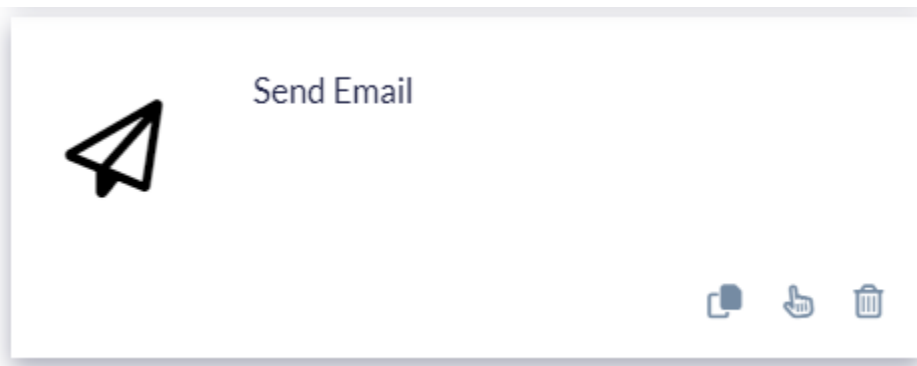
Close

Save & Close

Save

The Send Email Component

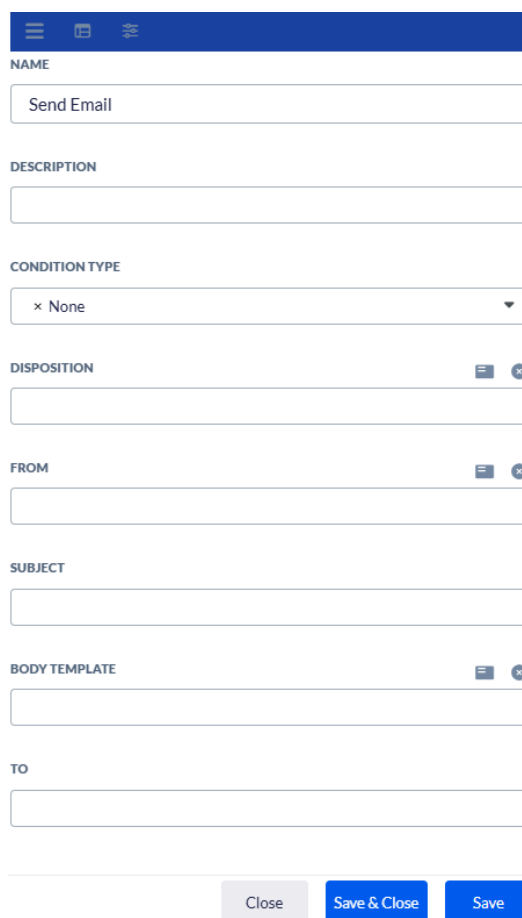
The Send Email component is a standard component to deliver an email template from the workflow. It will create a new email workitem and will need the to, from, subject and disposition to be set.



Configuration Fields

When configuring a Send Email component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Disposition (Mandatory)	Identifier of the disposition for the email workitem that is created.
From (Mandatory)	The internal email address from which the email is to be sent.
Subject (Optional)	The subject of the email.
Body Template (Optional)	The template for the email's content.
To (Mandatory)	The email address to which the email is to be delivered.



The image shows a configuration form for the 'Send Email From Expression' component. The form is titled 'NAME' and contains a text input field with the value 'Send Email'. Below this is a 'DESCRIPTION' field, which is currently empty. The 'CONDITION TYPE' is set to 'x None' in a dropdown menu. The 'DISPOSITION' field is empty, with a small icon to its right. The 'FROM' field is empty, with a small icon to its right. The 'SUBJECT' field is empty. The 'BODY TEMPLATE' field is empty, with a small icon to its right. The 'TO' field is empty. At the bottom of the form are three buttons: 'Close', 'Save & Close', and 'Save'.

NAME

Send Email

DESCRIPTION

CONDITION TYPE

x None

DISPOSITION

FROM

SUBJECT

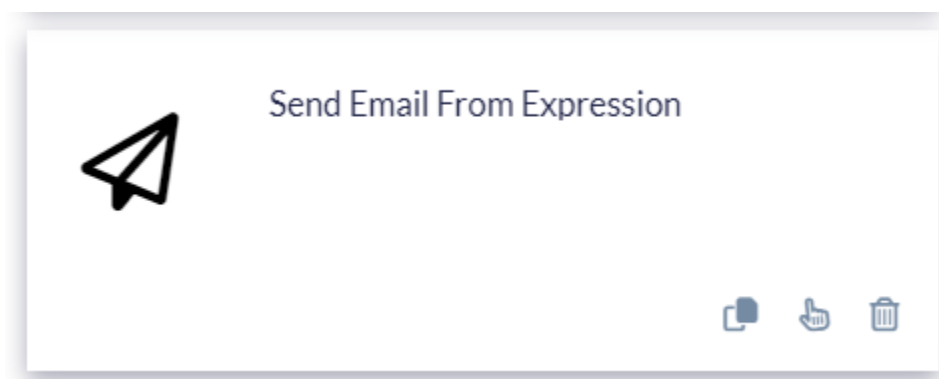
BODY TEMPLATE

TO

Close Save & Close Save

The Send Email From Expression Component

Similar to the Send Email component, the Send Email From Expression will send a new email workitem to a particular address. The difference here is that the content template of the email can be passed via an expression or variable. This allows for dynamic assignment of the template identifier, allowing for more flexibility in the workflow.



Configuration Fields

When configuring a Send Email From Expression component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Disposition (Mandatory)	The identifier of the disposition for the newly created email workitem.
From (Mandatory)	The internal email address from which to send the email.
Subject (Optional)	The subject of the email.
To (Mandatory)	The email address to which the email is to be sent.
Email Template ID (Optional)	The identifier of the email template, which may be passed as a variable.

NAME

Send Email From Expression

DESCRIPTION

CONDITION TYPE

× None

DISPOSITION

FROM

SUBJECT

TO

EMAIL TEMPLATE ID

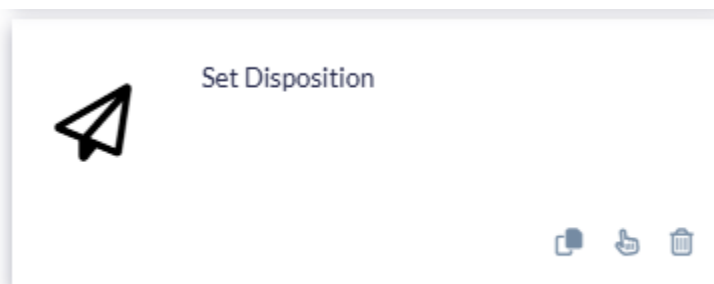
Close

Save & Close

Save

The Set Disposition Component

This component is used for workitems that aren't handled by agents that are going to set a disposition and the disposition is set in the workflow. This is a way for the system to automatically set the disposition of workitems, reports can then be run on those dispositions.



Configuration Fields

When configuring a Set Disposition component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Disposition	The disposition that will workitems in the workflow with this component will be set to.

NAME

Set Disposition

DESCRIPTION

DISPOSITION

CONDITION TYPE

× None

Close

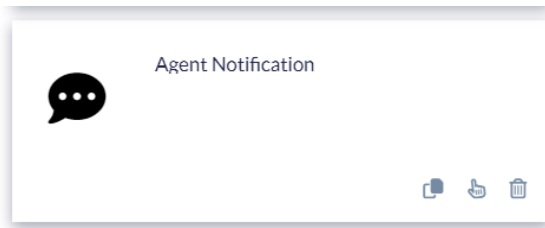
Save & Close

Save

Notification Messaging

The Agent Notification Component

The Agent Notification component in the workflow, creates a user interface notification for an agent or agents.



Configuration Fields

When configuring an Agent Notification component in the Workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Message (Mandatory)	The notification message that will be displayed to the user.
Alert Type (Mandatory)	The kind of pop up alert that will display: Error: Red, Info : Blue, Success : Green, Warning : Yellow
Duration (Mandatory)	How long the message will be presented to the agent before the alert closes automatically.
Current Agent (Mandatory)	If enabled, only the agent currently assigned to the workitem will get the alert.

All Agents (Optional)	If enabled, all agents will get the alert (not just the current agent).
User Direct Number (Mandatory)	If enabled, only the user who matches the direct number assigned to him will get the alert.
Extension	The extension of the user you want to be notified.
User	The user that you want to be notified.
User ID Variable	Instead of specifying a particular user, you will notify the user that's being passed in the variable.

NAME

Agent Notification

DESCRIPTION

MESSAGE

ALERT TYPE

× Select value...

DURATION

× Select value...

CURRENT AGENT

ALL AGENTS

USER DIRECT NUMBER

EXTENSION

USER

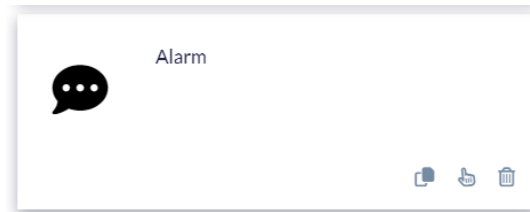
Close

Save & Close

Save

The Alarm Component

The Alarm component raises a compliance alarm on an individual workitem and/or user dashboards. The Compliance alarm needs to be configured in the users and/or workitems dashboard:



Configuration Fields

When configuring an Alarm component in the Workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Message (Mandatory)	The message the alarm will display.

NAME

Alarm

DESCRIPTION

MESSAGE

CONDITION TYPE

× None

Close

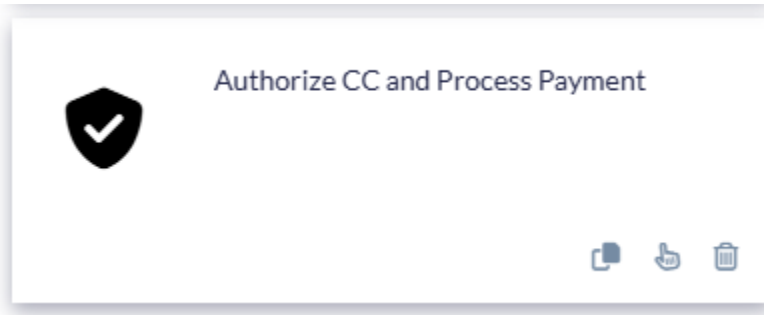
Save & Close

Save

Payment

The Authorize CC and Process Payment Component

This component is used to process secure payments via an Integrated Voice Response (IVR). A payment service can be identified in this component to process payments.



Configuration Fields

When configuring an Authorize CC and Process Payment component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Credit Card Number	The credit/debit card number.
Expiration Month	The expiration month of the credit/debit card.
Expiration Year	The expiration year of the credit/debit card.
Security Code	The 3 or 4 digit security code of the credit card.
Amount	The amount being paid.

Service	The third-party payment gateway service being used. The service must exist in the system to be used.
Response Variable	The response from the gateway gets stored in the response variable

NAME

Authorize CC and Process Payment

DESCRIPTION

T_CARD_NUMBER

EXPIRATION MONTH

EXPIRATION YEAR

SECURITY CODE

AMOUNT

SERVICE

Close

Save & Close

Save



EXPIRATION MONTH

EXPIRATION YEAR

SECURITY CODE

AMOUNT

SERVICE  

RESPONSE VARIABLE

CONDITION TYPE

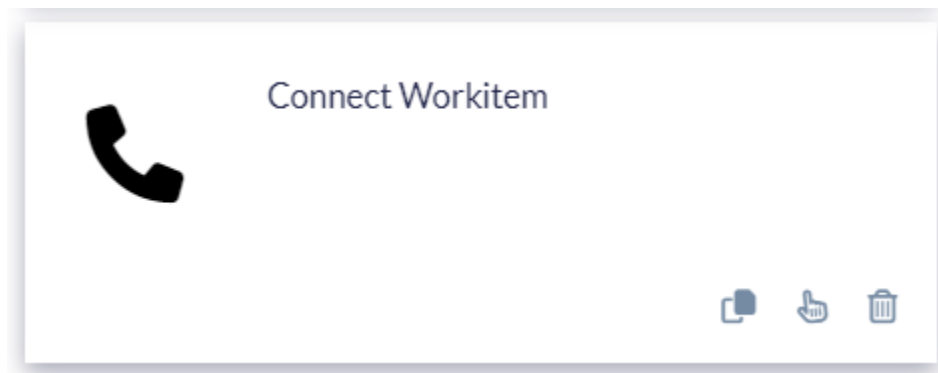
Close

Save & Close

Save

The Connect Workitem Component

This component is used to connect a workitem that was sent to a workflow back with the agent that originally handled it. It is used, for example, to bring back a call to an agent that had sent a customer into a payment IVR to collect necessary credit card information. When an agent has to send a customer into a workflow, there is the choice of removing the agent from the call (when sensitive information is handled), so this component is used in this situation.



Configuration Fields

When configuring a Connect Workitem component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

NAME

Connect Workitem

DESCRIPTION

CONDITION TYPE

× None

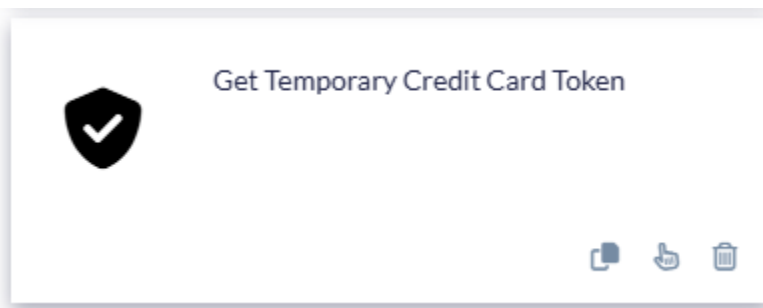
Close

Save & Close

Save

The Get Temporary Credit Card Token Component

When you are making credit card payments, you need to get a token from the verification company in order to be able to pass the information and in order to get a confirmation that the payment has gone through.



Configuration Fields

When configuring a Get Temporary Credit Card Token component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Payment Card Number	The credit card number.
Expiration Date	The expiration date of the credit card.
Security Code	The 3 or 4 digit security code of the credit card.
Service	The third-party payment service being used. The service must exist in the system to be used.
Response Variable	The variable that's being passed, where the system receives the response from the third party system.

NAME

Get Temporary Credit Card Token

DESCRIPTION

PAYMENT CARD NUMBER

EXPIRATION DATE

SECURITY CODE

SERVICE

RESPONSE VARIABLE

CONDITION TYPE

x None

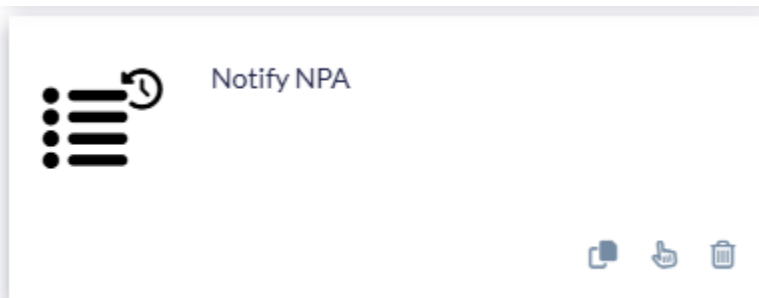
Close

Save & Close

Save

The Notify NPA Component

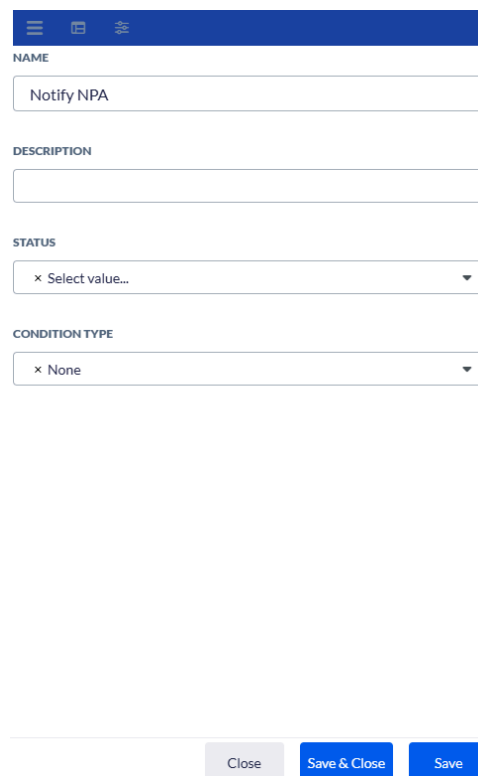
This component updates a NCC user about the status of a workitem as the workitem is going through a function that handles sensitive customer data.



Configuration Fields

When configuring a Notify NPA component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Status	Success or Failure.



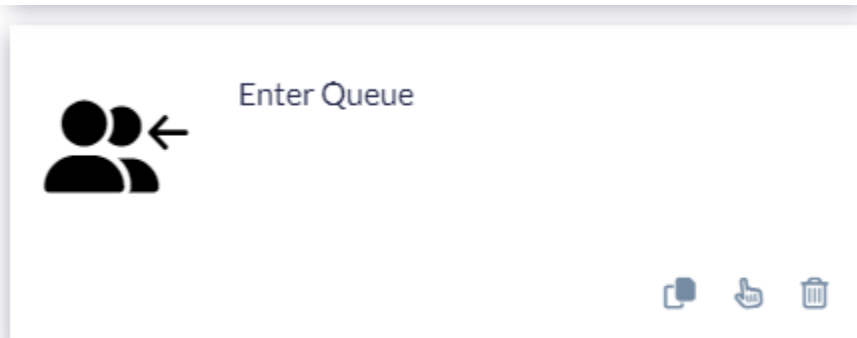
The screenshot shows a configuration form for a 'Notify NPA' component. It features a blue header bar with three icons (hamburger menu, calendar, and a gear). Below the header, the form is organized into sections: 'NAME' with a text input field containing 'Notify NPA'; 'DESCRIPTION' with a text input field; 'STATUS' with a dropdown menu showing 'x Select value...'; and 'CONDITION TYPE' with a dropdown menu showing 'x None'. At the bottom of the form, there are three buttons: 'Close' (light blue), 'Save & Close' (blue), and 'Save' (blue).

Queue

The Enter Queue Component

The Enter Queue component is used to have a workitem enter the specified queue(s) to be handled by the next available agent.

NOTE: The Enter Queue component is usually followed by either a Play Prompt or a Play Music component for the caller to listen to while waiting for the next available agent.



Configuration Fields

When configuring an Enter Queue component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Priority (Mandatory)	Select the priority for this workitem from the drop-down list.
Queues (Mandatory)	Select the queue(s) this workitem can be handled by from the list icon.
Ring All (Optional)	This toggle determines whether all available agents are to be offered the workitem at the same time. The first to accept will receive the workitem.
Enable Sticky Agent (Optional)	If enabled, the workitem will wait for the agent that is specified before trying to go to the next available agent. If disabled, the workitem will follow the normal rules of the queue.
Sticky Agent Type (Optional)	Determines the type of sticky agent. This can be an agent searched from history or

	a fixed agent for the queue, different fields will be displayed below if this is selected.
How long to wait for agent (sec) (Mandatory)	Duration in seconds to wait for the sticky agent to be available before being routed to another agent.

NAME

Enter Queue

DESCRIPTION

PRIORITY

× Select value...

QUEUES

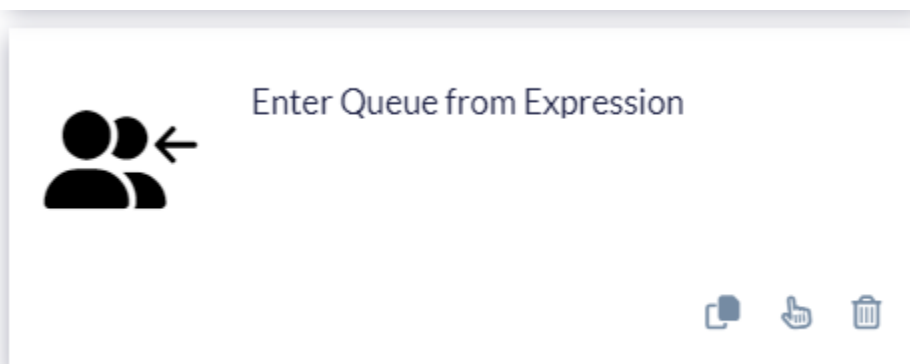
Close

Save & Close

Save

The Enter Queue from Expression Component

Similar to the Enter Queue component, this one allows for the queues to be dynamically assigned in the workflow. Flexibility is brought into the workflow by passing the queue identifiers as variables.



Configuration Fields

When configuring an Enter Queue From Expression component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Priority (Mandatory)	Select the priority for this workitem from the drop-down list.
Queue Ids (Mandatory)	Enter the ID of the queue(s) this workitem can be handled by from the list icon.
Ring All (Optional)	This toggle determines whether all available agents are to be offered the workitem at the same time. The first to accept will receive the workitem.
Enable Sticky Agent (Optional)	If enabled, the workitem will wait for the agent that is specified before trying to go to the next available agent. If disabled, the workitem will follow the normal rules of the queue.
Sticky Agent Type (Optional)	Determines the type of sticky agent. This can be an agent searched from history or a fixed agent for the queue, different fields will be displayed below if this is selected. Only visible if Enable Sticky Agent is on.

How long to wait for agent (sec) (Mandatory)	Duration in seconds to wait for the sticky agent to be available before being routed to another agent. Only visible if Enable Sticky Agent is on.
---	---

NAME

Enter Queue from Expression

DESCRIPTION

PRIORITY

QUEUE IDS

RING ALL

ENABLE STICKY AGENT

STICKY AGENT TYPE

×

Select value...

HOW LONG TO WAIT FOR AGENT (SEC)

Close

Save & Close

Save



PRIORITY

QUEUE IDS

RING ALL

☐

ENABLE STICKY AGENT

☒

STICKY AGENT TYPE

× Select value...

HOW LONG TO WAIT FOR AGENT (SEC)

CONDITION TYPE

× None

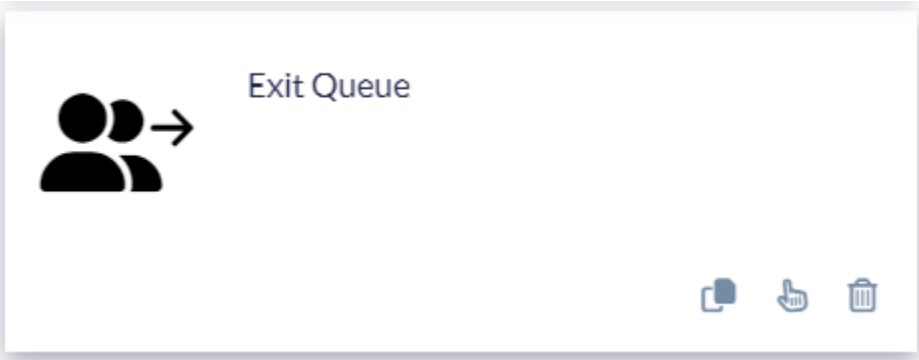
Close

Save & Close

Save

The Exit Queue Component

The Exit Queue component is used to remove the workitem from all queues it is currently waiting in. This is important to use if a workitem is being sent to a function that presents a new IVR, such as voicemail or callbacks, or if the call is to be externally transferred.



Configuration Fields

When configuring an Exit Queue Component in the Workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

NAME

Exit Queue

DESCRIPTION

CONDITION TYPE

× None

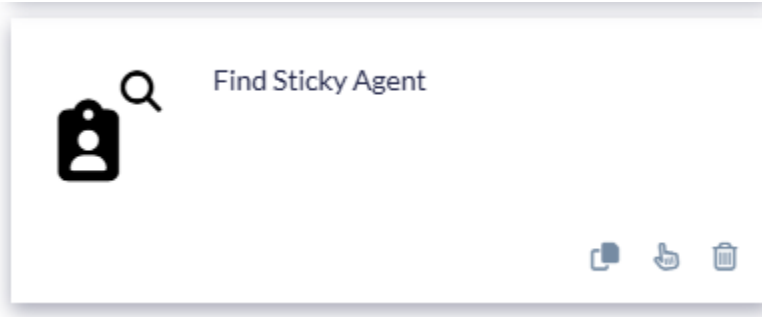
Close

Save & Close

Save

The Find Sticky Agent Component

The Sticky Agent refers to either a unique individual or the last agent that handled a call from this particular caller. Sticky Agent allows the system to wait for a particular agent for a predetermined amount of time before routing the call to other available agents. The Find Sticky Agent component identifies who the last agent to communicate with this caller was.



Configuration Fields

When configuring a Find Sticky Agent component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Query	Most likely going to be workitem.from this is the phone number that the customer is calling in from.
Date Range	How far back do you want to look for the sticky agent. This week, this month, last 30 days. VERIFY
Response Variable	Must be stickyAgent.



NAME

DESCRIPTION

QUERY

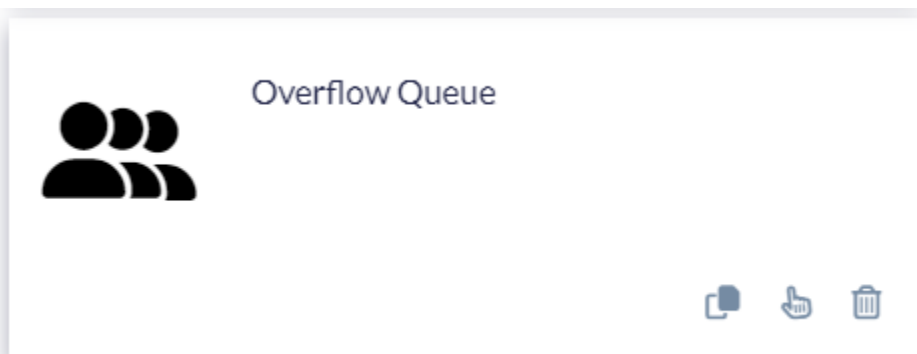
DATE RANGE

RESPONSE VARIABLE

CONDITION TYPE

The Overflow Queue Component

The Overflow Queue component is used to enable other queues to be able to handle the workitem, used when queues often have too many workitems and there aren't enough agents to handle them.



Configuration Fields

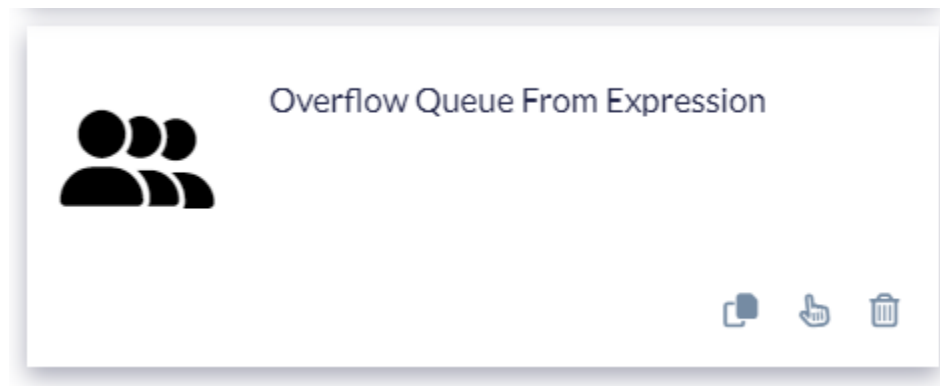
When configuring an Overflow Queue component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Queues (Mandatory)	Select the queue(s) this workitem can be overflowed to from the list icon.

The screenshot shows a configuration form for an 'Overflow Queue' component. At the top is a blue header bar with three icons: a hamburger menu, a list icon, and a refresh icon. Below the header, the form is organized into sections. The 'NAME' section has a text input field containing 'Overflow Queue'. The 'DESCRIPTION' section has an empty text input field. The 'CONDITION TYPE' section features a dropdown menu currently set to 'None'. The 'QUEUES' section includes a large empty list box with a list icon and a close button in its top right corner. At the bottom of the form are three buttons: 'Close' (light gray), 'Save & Close' (blue), and 'Save' (blue).

The Overflow Queue From Expression Component

This component dynamically sets the queues to overflow the workitem into when there aren't enough agents available in the primary queue(s). Queues can be set via a variable.



Configuration Fields

When configuring an Overflow Queue From Expression component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Queue Ids (Mandatory)	The variable or identifiers of the queues to be selected.

NAME

Overflow Queue From Expression

DESCRIPTION

CONDITION TYPE

× None

QUEUE IDS

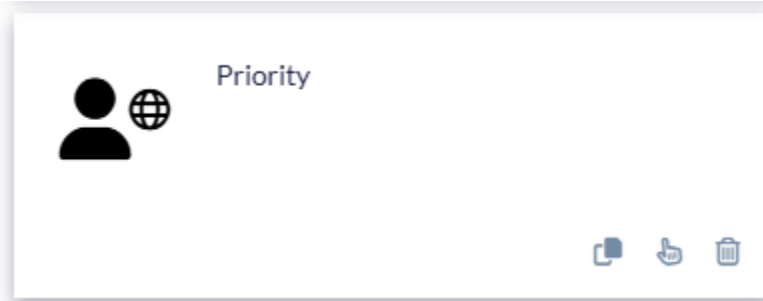
Close

Save & Close

Save

The Priority Component

The Priority component assigns priority to a workitem. If somebody calls in to a workflow from a particular phone number you can increase the priority of that workitem, so that the call will be answered faster.



Configuration Fields

When configuring a Priority component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Priority	The priority to assign to the workitem. The priority options are: • High • Highest • Low • Lowest • Standard



NAME

DESCRIPTION

PRIORITY

× Select value... ▼

CONDITION TYPE

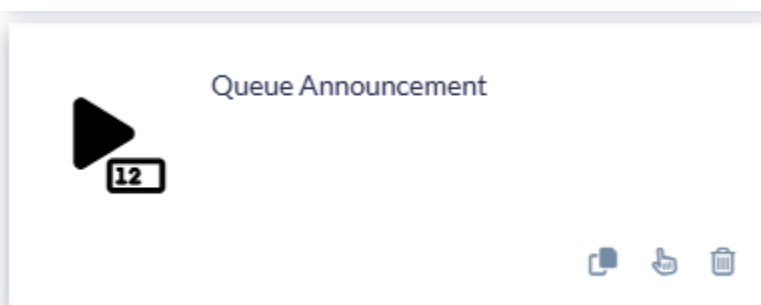
× None ▼

Close

Save & Close

Save

The Queue Announcement Component



Configuration Fields

When configuring a Queue Announcement component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Prompt (Mandatory)	Prompts set here, will override the queue announcement prompt set in the queue. Prompts can be played based on different conditions.

NAME

Queue Announcement

DESCRIPTION

PROMPT

CONDITION TYPE

× None

Close

Save & Close

Save

The Queue Data Component

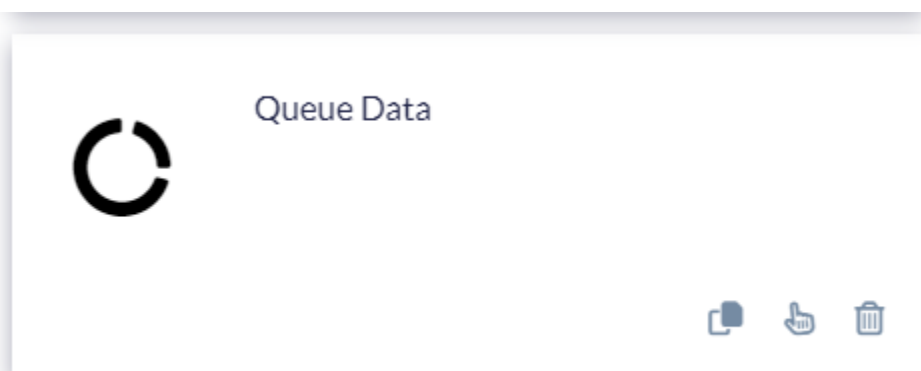
The Queue Data component will return the following information based on the specific queue(s) selected in this component. It will create a variable called `channelAvailability` in the workitem that contains a few pieces of queue information.

- The total number of Logged in agents. The value will be stored in the variable: `workitem.channelAvailability.loggedAgents`.

- The total number of Available agents from the specified queue. The value will be stored in the variable: `workitem.channelAvailability.availableAgents`.
- The estimated wait time a caller has been waiting in the queue. The value will be stored in the variable:
`workitem.channelAvailability.voice.estimatedWaitTimeInSeconds`. For information regarding calculations, see the [Estimated Wait Time article](#).
- The total number of workitems in the queue. The value will be stored in the variable: `workitem.channelAvailability.workitems`.
- The estimated wait time for a workitem that is waiting in the queue. The value will be stored in the variable:
`workitem.channelAvailability.chat.estimatedWaitTimeInSeconds`.
- The estimated wait time a SMS workitem has been waiting in the queue. The value will be stored in the variable:
`workitem.channelAvailability.sms.estimatedWaitTimeInSec`.
- The `workitemsPosition` variable: is a mapping of each workitem identifier to their current smallest position in queue (if in multiple queues). It can be used to play the current position to the customer.

The component can be used if you want to know, prior to entering the queue, if there are any agents logged in, available and/or the amount of time the caller or other workitems might be waiting prior to being routed to an agent. The Queue Data component's functionality can only accept one queue in the configuration of this workflow component.

NOTE: When using the queue data in the workflow, you must have the Real Time Data option enabled in the queue configuration for this to work properly.



Configuration Fields

When configuring a Queue Data component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Queues (Mandatory)	Select the queue(s) this workitem can be overflowed to from the list icon.

NAME

Queue Data

DESCRIPTION

CONDITION TYPE

× None

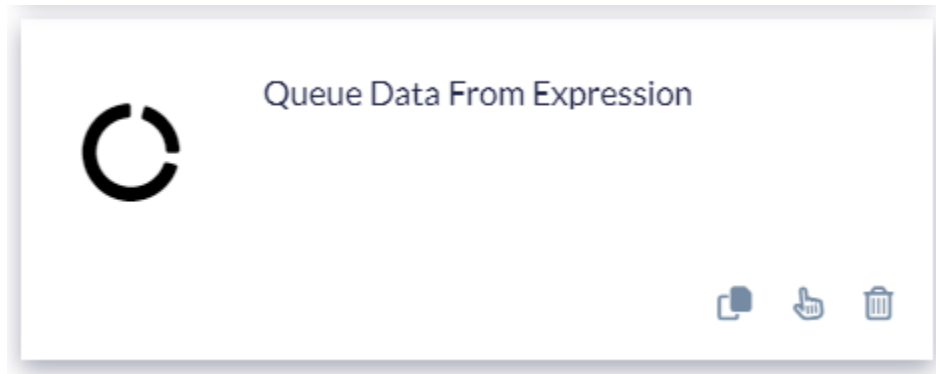
QUEUES

Close Save & Close Save

The Queue Data From Expression Component

In a similar way to the Queue Data component, the Queue Data From Expression component allows the workflow to dynamically assign the queue identifiers to the

component to extract the information from the queue. It makes it possible to assign queues based on what happens in the workflow.



Configuration Fields

When configuring a Queue Data From Expression component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Queue Ids (Mandatory)	The variable or identifiers of the queue(s) for which data is to be added to the channelAvailability variable in the workitem.



NAME

Queue Data From Expression

DESCRIPTION

CONDITION TYPE

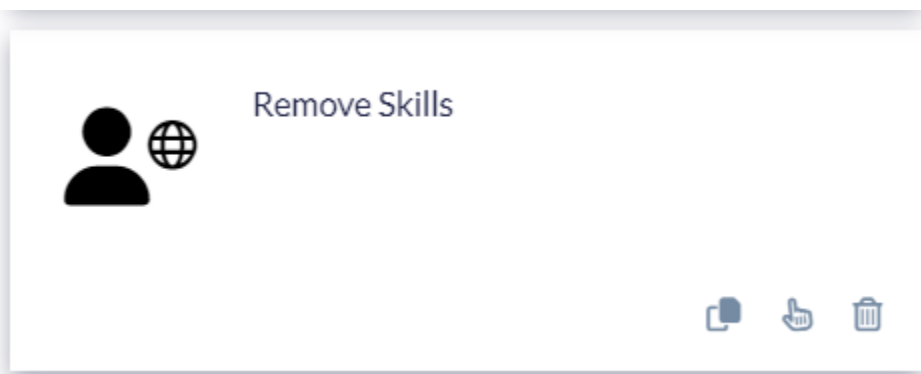
× None

QUEUE IDS

Close Save & Close Save

The Remove Skills Component

The Remove Skills component will remove all skills that are currently associated with the workitem. Once the skills are removed, the workitem will need to be removed and placed back into the queue. This allows any skill restrictions on the item to be changed in case a workitem is not reaching an agent.



Configuration Fields

When configuring a Remove Skills component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Optional Skills To Have	If 2 agents are available, the call will be routed to the agent with the higher skill. If there are no agents available with that skill, the call will still route to another available agent.
Mandatory Skills To Have	If 2 agents are available, the call will be routed to the agent with the higher skill. If there are no agents available with that skill, the call will not route to another available agent.

NAME

Remove Skills

DESCRIPTION

OPTIONAL SKILLS TO HAVE

MANDATORY SKILLS TO HAVE

Close

Save & Close

Save

The Skill Name Component

The Skill Name component works in conjunction with an Enter Queue component. The Skill Name component will calculate the skill level of all users that are specified in the Enter Queue that follows the Skill Name Component. Based on the skill specified, when the workitem enters the queue, the system will route it to the highest skilled users that are logged in and available. The skill can be specified either by entering the name of the skill or by a predefined variable.

NOTE: If a variable is not used, then the skill name specified must be contained in single quotes.

- Example: To enter a skill called Spanish, it would be entered as: 'Spanish'.
- To enter the skill as a variable that would have been assigned earlier in the workflow, it would be entered as: `workitem.data.language`.



Configuration Fields

When configuring a Skills Name component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Skill name (Mandatory)	Enter the skill name or a predefined variable that contains the name of the skill.
Skill (Mandatory)	The skill identifier.

Mandatory skill (Mandatory)	If enabled, the user must have the skill. If disabled, then the skill is considered optional.
-----------------------------	---

NAME

Skill Name

DESCRIPTION

SKILL NAME

SKILL

MANDATORY SKILL

☐

CONDITION TYPE

× None

Close

Save & Close

Save

The Skills Component

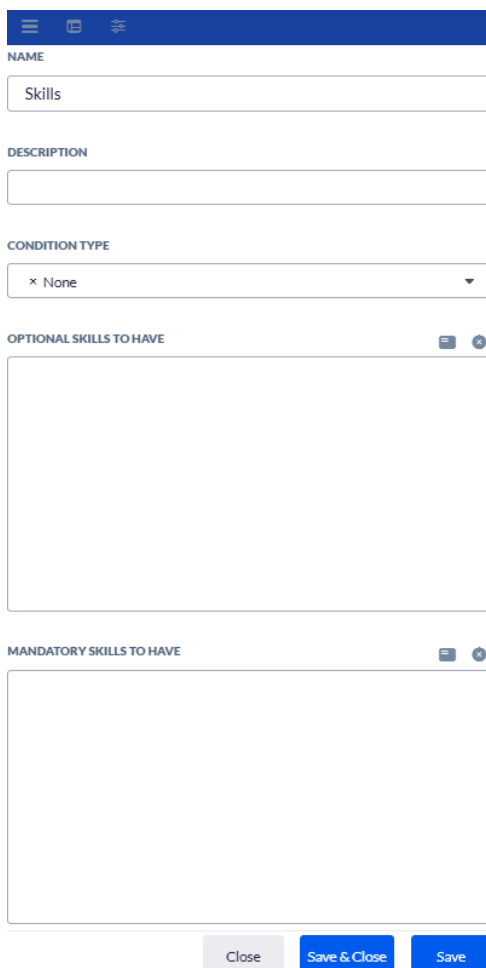
The Skills Component works in conjunction with an Enter Queue component. The Skills Component will calculate the skill levels of all users that are specified in the Enter Queue component that follows the Skills component. Based on the skill(s) selected, when the workitem enters the queue, the system will route it to the highest skilled users that are logged in and available.



Configuration Fields

When configuring a Skills component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Optional Skills To Have	The selection of optional skills the agent must have.
Mandatory Skills To Have	The selection of mandatory skills the agent must have. Take care here as the workitem will not route if there are no users with ALL of the skills in this list.



The image shows a web form for configuring skills. It has a dark blue header bar with three icons: a list, a document, and a settings gear. Below the header, the form is organized into sections. The 'NAME' section has a text input field containing the word 'Skills'. The 'DESCRIPTION' section has an empty text input field. The 'CONDITION TYPE' section features a dropdown menu with 'None' selected. Below this are two large, empty rectangular areas for 'OPTIONAL SKILLS TO HAVE' and 'MANDATORY SKILLS TO HAVE', each with a small list icon and a plus sign in the top right corner. At the bottom of the form are three buttons: 'Close' (light gray), 'Save & Close' (blue), and 'Save' (blue).

NAME

Skills

DESCRIPTION

CONDITION TYPE

x None

OPTIONAL SKILLS TO HAVE

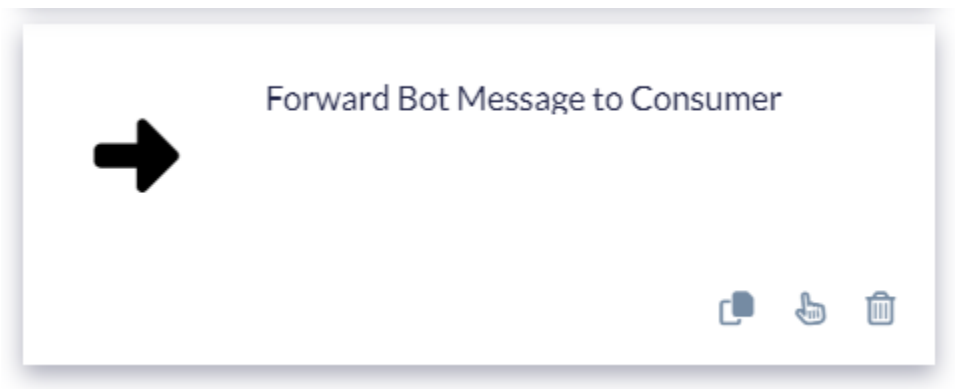
MANDATORY SKILLS TO HAVE

Close Save & Close Save

SMS

The Forward Bot Message to Consumer Component

Similar to what the Chat Bot Message to Consumer component does, the Forward Bot Message to Consumer component is used in conjunction with a Dialogflow Conversational Bot and sends the bot's reply to the consumer. This comes after a Message Bot component always and will forward the text message from a Webhook Request to the consumer building out a new SMS message .



Configuration Fields

When configuring a Forward Bot Message to Consumer component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

NAME

Forward Bot Message to Consumer

DESCRIPTION

CONDITION TYPE

× None

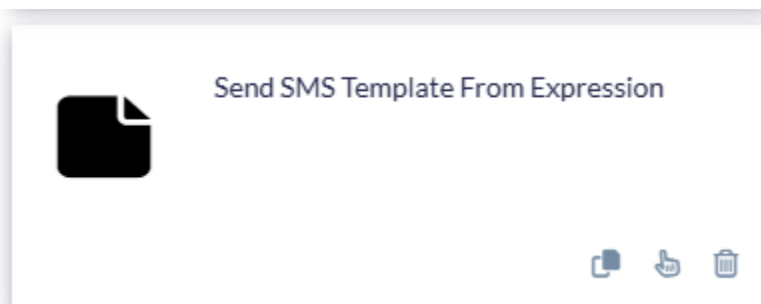
Close

Save & Close

Save

The Send SMS Template From Expression Component

You can set up different Send SMS Template from Expression components that can be triggered based on different conditions in the same workflow.



Configuration Fields

When configuring a Send SMS Template From Expression component in the Workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
From	The address the SMS workitem will be sent from.
To	The address the sms workitem will be sent to. This could be a variable such as workitem.from so the workitem will be sent to the phone number of a caller.
SMS Template ID	The ID of the template that you'll be sending.
Create a New Workitem	If enabled, a new workitem will be created in the system, everytime the workflow is called.



NAME

Send SMS Template From Expression

DESCRIPTION

FROM

TO

SMS TEMPLATE ID

CREATE A NEW WORKITEM

☐

CONDITION TYPE

x None

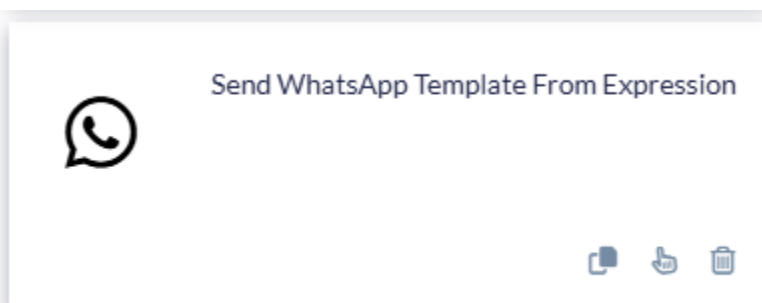
Close

Save & Close

Save

The Send WhatsApp Template From Expression Component

This component would be used if you wanted to send a WhatsApp message to a customer depending on a particular number that they've called, you can choose to send a different message. You can have one workflow and depending on the number the person called, you can send a different template. Alternatively, different templates can be sent based on how variables are set.



Configuration Fields

When configuring a Send WhatsApp Template From Expression component in the Workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
From	The number you're sending the message from.
To	The number you're sending the message to.
WhatsApp Template Identifier	The ID of the WhatsApp template
Create a New Workitem	Enable if you want to create a new workitem

NAME

Send WhatsApp Template From Expression

DESCRIPTION

FROM

TO

WHATSAPP TEMPLATE IDENTIFIER

CREATE A NEW WORKITEM

CONDITION TYPE

x None

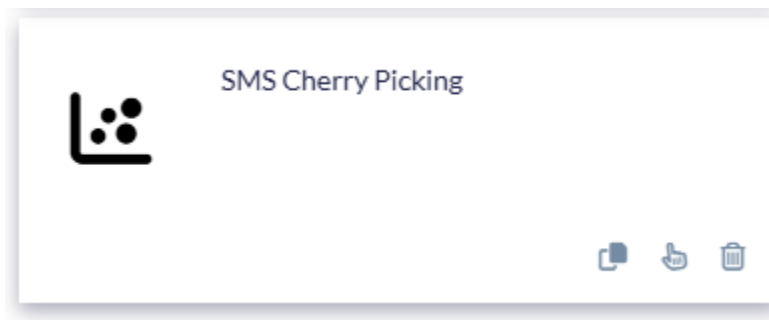
Close

Save & Close

Save

The SMS Cherry Picking Component

This workflow component marks SMS workitems for cherry picking.



Configuration Fields

When configuring a SMS Cherry Picking component in the Workflow, the following fields will be displayed:

Field Name	Description
------------	-------------

Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
---	---

NAME

SMS Cherry Picking

DESCRIPTION

CONDITION TYPE

× None

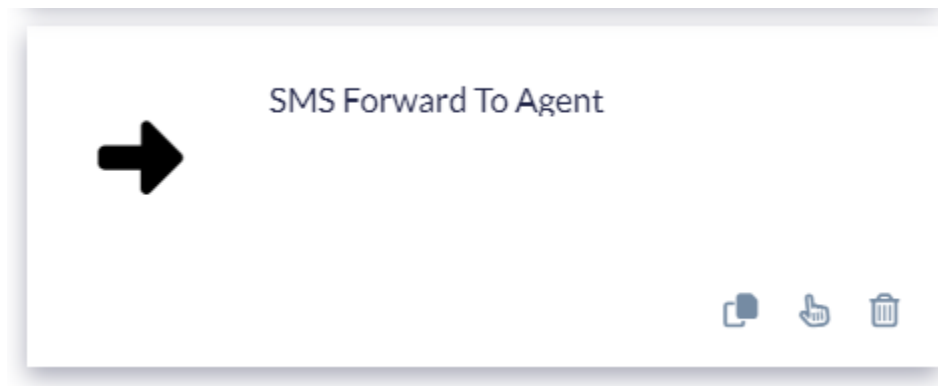
Close

Save & Close

Save

The SMS Forward To Agent Component

The SMS Forward to Agent component is used to send the received SMS message from the consumer to the agent. This component works in conjunction with SMS Wait for Messages.



Configuration Fields

When configuring a SMS Forward To Agent component in the Workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

NAME

SMS Forward To Agent

DESCRIPTION

CONDITION TYPE

× None

Close

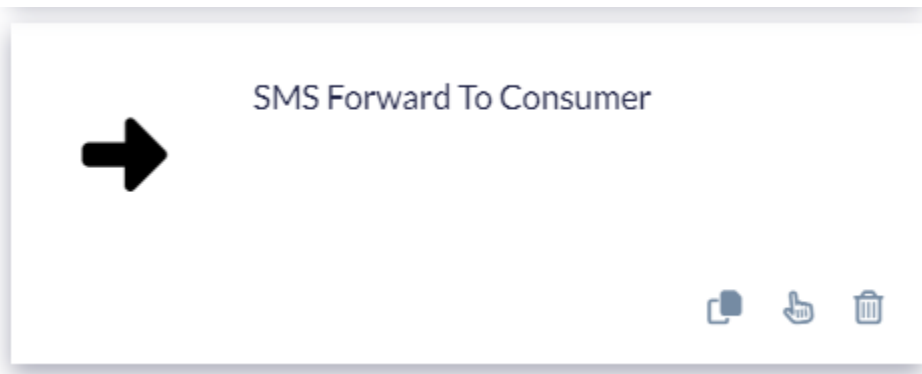
Save & Close

Save

The SMS Forward To Consumer Component

The SMS Forward to Consumer component is used to send the received SMS message from the agent to the consumer.

This component works in conjunction with SMS Wait for Messages and is a key part of any SMS or WhatsApp workflow. This component should only be used in campaigns that will handle these types of messages.



Configuration Fields

When configuring a SMS Forward To Consumer component in the Workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

NAME

SMS Forward To Consumer

DESCRIPTION

CONDITION TYPE

×

None

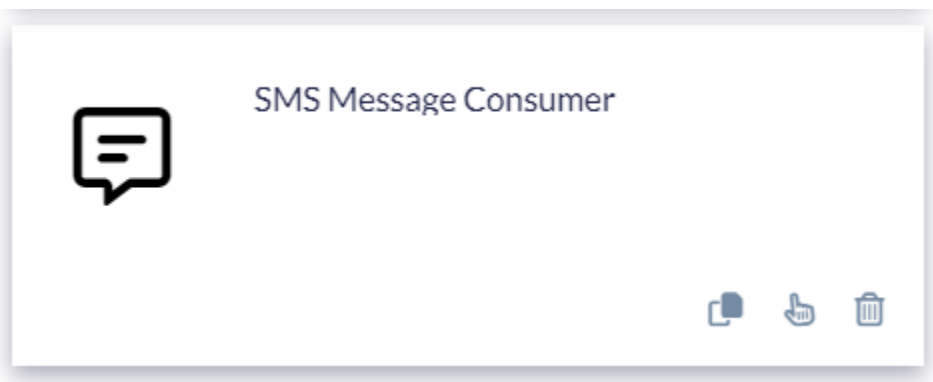
Close

Save & Close

Save

The SMS Message Consumer Component

The SMS Message Consumer component is used to automatically send a specified message to the consumer directly from the workflow. This creates a new outbound SMS workitem and can be used in any workflow to send fixed SMS messages.



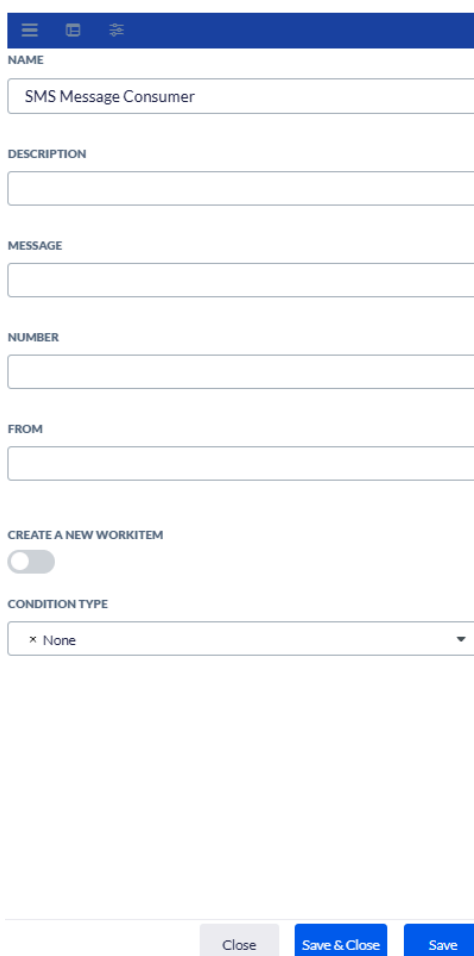
Configuration Fields

When configuring a SMS Message Consumer component in the Workflow, the following fields will be displayed:

Field Name	Description
------------	-------------

Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Message (Mandatory)	Enter the message to be sent to the consumer.
Number (Mandatory)	Enter the phone number where the message will be sent.
From (Mandatory)	Enter a valid system SMS phone number that will be displayed as the caller ID to the consumer.
Create a New Workitem	If enabled, a new workitem will be generated, when processing the workflow action Send SMS.

NOTE: The Number and the From fields can be entered as a variable or directly entered in the format: '+12125551234'.



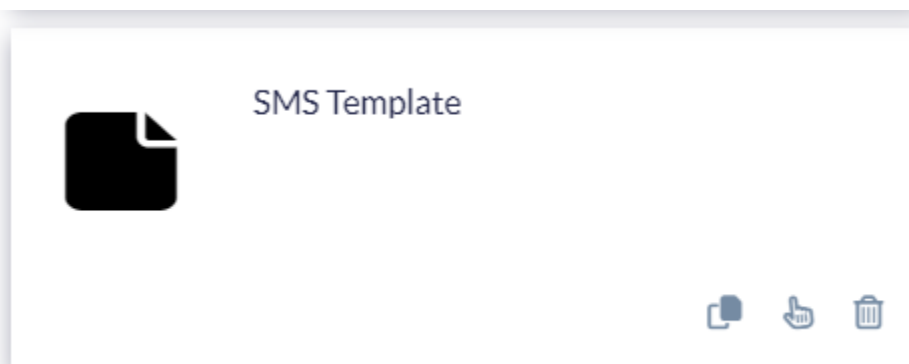
The screenshot shows a configuration form for an SMS Template component. At the top is a blue header bar with three icons: a menu, a document, and a speech bubble. Below the header, the form contains several fields and controls:

- NAME:** A text input field containing "SMS Message Consumer".
- DESCRIPTION:** An empty text input field.
- MESSAGE:** An empty text input field.
- NUMBER:** An empty text input field.
- FROM:** An empty text input field.
- CREATE A NEW WORKITEM:** A toggle switch that is currently turned off.
- CONDITION TYPE:** A dropdown menu with "x None" selected.

At the bottom of the form, there are three buttons: "Close" (light gray), "Save & Close" (blue), and "Save" (blue).

The SMS Template Component

The SMS Template component is used to automatically send a specified message that has been configured in a template to the consumer directly from the workflow. This template may take variables to fill in from the workflow, it is used, for example, in providing the customer with a brief description of their IVR choices. Or sending an HTML link at the end of a conversation. This component will create a new outbound SMS workitem and can be used in any workflow.



Configuration Fields

When configuring a SMS Template component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Body Template (Mandatory)	Select the template that contains the message to be sent from the drop-down list
From (Mandatory)	Enter a valid system SMS phone number that will be displayed as the caller ID to the consumer.
To (Mandatory)	Enter the phone number where the message will be sent.
Create a New Workitem	If enabled, a new workitem will be generated, when processing the new Send SMS workflow action.



NAME

SMS Template

DESCRIPTION

BODY TEMPLATE

FROM

TO

CREATE A NEW WORKITEM

☐

Close

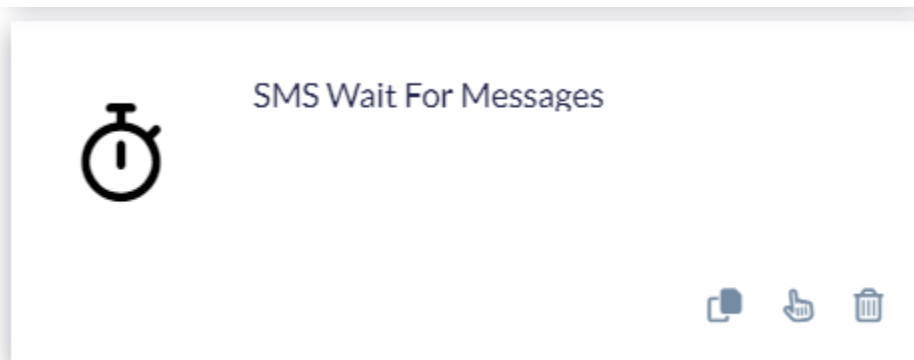
Save & Close

Save

The SMS Wait For Messages Component

The SMS Wait For Messages component is used to capture the SMS messages from either the agent or the consumer as they come into the workflow. This holds a text message object that contains information on the message, which can be used to make conditional transitions to other workflow states.

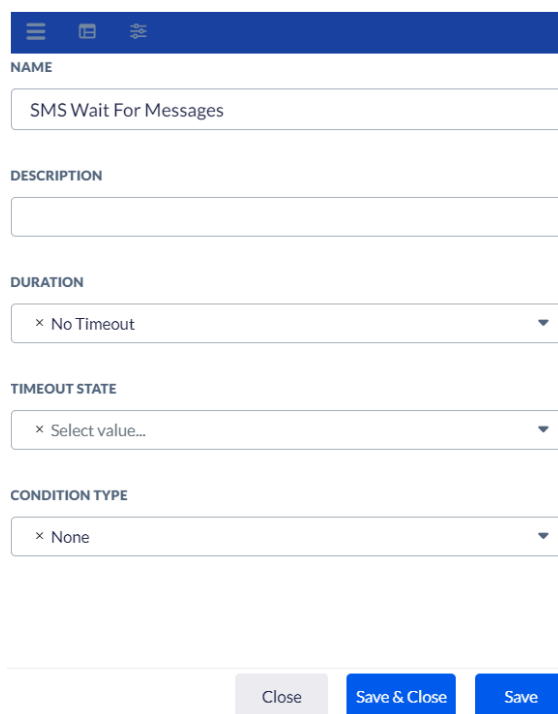
This component works in conjunction with the SMS Forward to Agent and SMS Forward to Consumer components, and is a key part of any SMS or WhatsApp workflow.



Configuration Fields

When configuring a SMS Wait Messages component in the workflow, the following fields will be displayed:

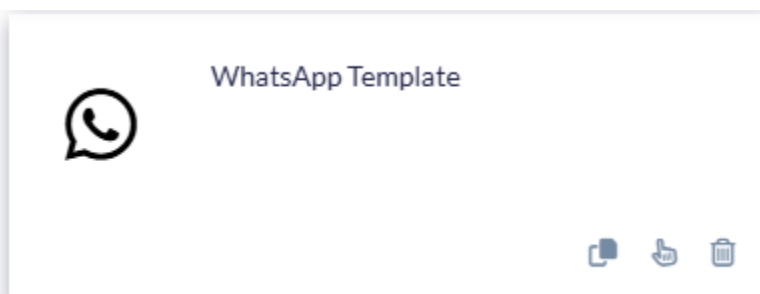
Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Duration	How long to wait for a message.
Timeout State	After the duration has expired, where to route the SMS.



The screenshot shows a configuration form for the 'SMS Wait For Messages' component. It features a blue header bar with three icons: a menu, a calendar, and a settings gear. Below the header, the form is organized into sections with labels in all caps: NAME, DESCRIPTION, DURATION, TIMEOUT STATE, and CONDITION TYPE. Each section has a corresponding input field. The NAME field contains the text 'SMS Wait For Messages'. The DESCRIPTION field is empty. The DURATION field is a dropdown menu with 'No Timeout' selected. The TIMEOUT STATE field is a dropdown menu with 'Select value...' selected. The CONDITION TYPE field is a dropdown menu with 'None' selected. At the bottom of the form, there are three buttons: 'Close' (light gray), 'Save & Close' (blue), and 'Save' (blue).

The WhatsApp Template Component

This is where you select the template for auto-reply for WhatsApp workitems. These can be messages or phone calls.



Configuration Fields

When configuring a WhatsApp Template component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
WhatsApp Template	The template you have to choose.
From	The WhatsApp number you're going to be sending from.
To	The WhatsApp number you're going to be sending the template to.
Create a New Workitem	If enabled, a new WhatsApp workitem will be created.

NAME

WhatsApp Template

DESCRIPTION

WHATSAPP TEMPLATE

FROM

TO

CREATE A NEW WORKITEM

CONDITION TYPE

x None

Close

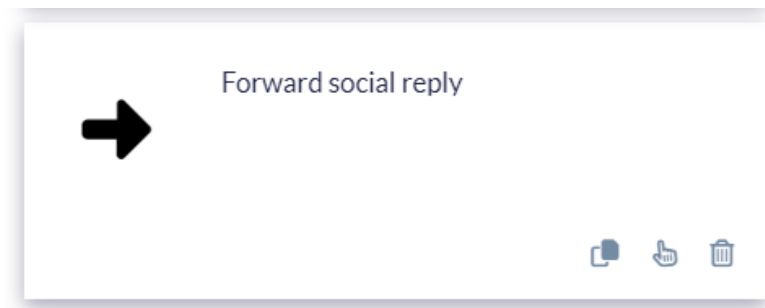
Save & Close

Save

Social

The Forward social reply Component

This component is used by workflows to forward a reply from an agent on a social post or message back to the appropriate system. When a workitem is in communication with a social page, the reply will be sent to the same customer that presented the original message. A Facebook page post will receive a reply on the post, for a Facebook direct message (DM) NCC will send the reply to the consumer's DM.



Configuration Fields

The Forward social reply component will have the following fields:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

NAME

Forward social reply

DESCRIPTION

CONDITION TYPE

× None

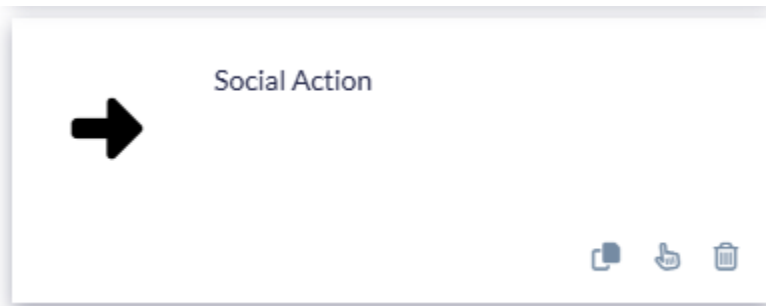
Close

Save & Close

Save

The Social Action Component

The Social Action component is used to deliver a social reply from agent to an end user.



Configuration Fields

When configuring a Social Action component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.



NAME

DESCRIPTION

CONDITION TYPE

× None▼

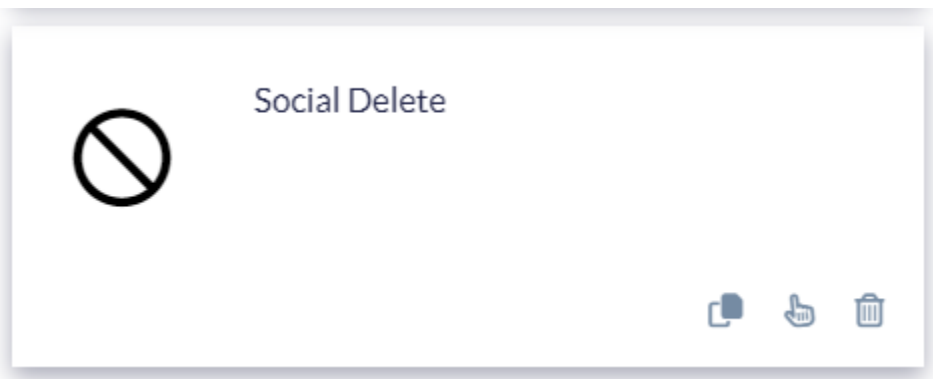
Close

Save & Close

Save

The Social Delete Component

This component will send a delete command in response to a post on Facebook. It will remove the post that created the workitem from the Facebook page.



Configuration Fields

When configuring a Social Delete component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

NAME

Social Delete

DESCRIPTION

CONDITION TYPE

× None

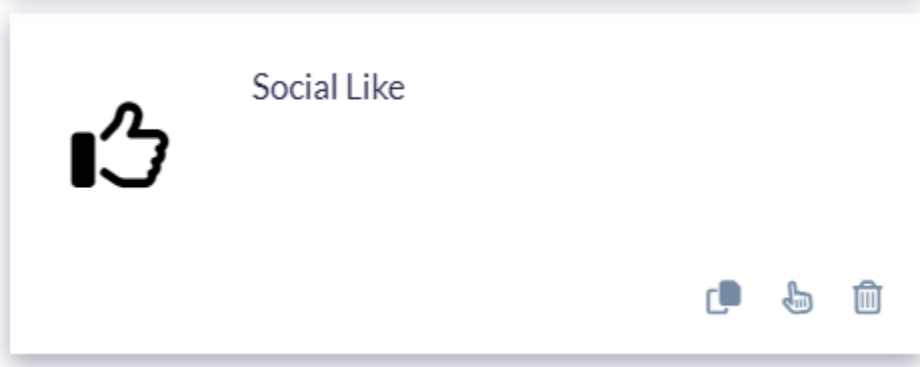
Close

Save & Close

Save

The Social Like Component

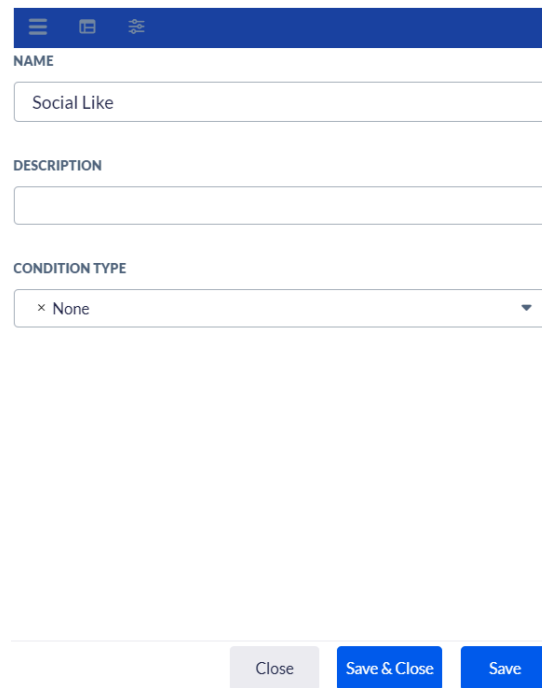
This component replies to a social post or message with a "Like". This will be transmitted in whatever fashion is native to the social platform in question. Example: Facebook will have a thumbs-up icon for the like action.



Configuration Fields

When configuring a Social Like component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

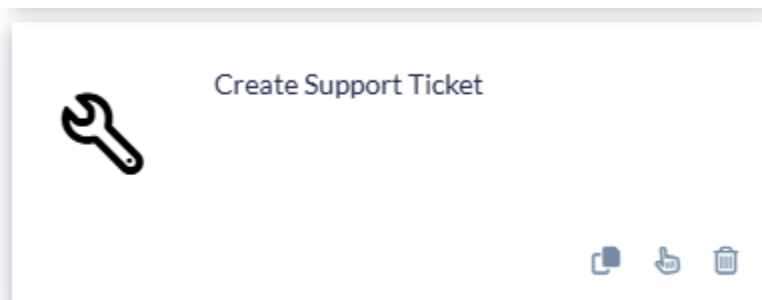


A screenshot of a web form titled "Create Support Ticket". The form has a blue header bar with three icons: a menu, a calendar, and a list. Below the header, there are three input fields: "NAME" with the value "Social Like", "DESCRIPTION" which is empty, and "CONDITION TYPE" with a dropdown menu showing "× None". At the bottom of the form, there are three buttons: "Close", "Save & Close", and "Save".

Support

The Create Support Ticket Component

This component creates a support ticket for Nextiva Contact Center. A service must have been set-up prior to the integration of the component in the workflow. Each service will have its token parameter that corresponds to the business creating the support ticket.



Configuration Fields

When configuring a Create Support Ticket component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Ticket Description (Optional)	The description of the ticket, which must contain enough information for the Support team to understand what the issue is.
Subject (Mandatory)	A brief description of the issue.
Ticket Type (Mandatory)	The Supported type of ticket that is being submitted.
Priority (Mandatory)	The priority of the ticket being submitted.
Status (Mandatory)	The supported status type that corresponds to the ticket.
Email (Mandatory)	The email with which you wish to generate the ticket, support will contact you on this email with their responses.
Phone (Mandatory)	The phone with which you wish to generate the ticket, support will contact you on this number with their responses.
Customer Name (Mandatory)	The name of the customer that is submitting the ticket.
Service (Mandatory)	The service (e.g. Freshdesk) that will be submitting the ticket.

NAME

Create Support Ticket

DESCRIPTION

TICKET DESCRIPTION

SUBJECT

TICKET TYPE

PRIORITY

STATUS

EMAIL

Close

Save & Close

Save

PRIORITY

STATUS

EMAIL

PHONE

CUSTOMER NAME

SERVICE

CONDITION TYPE

× None

Close

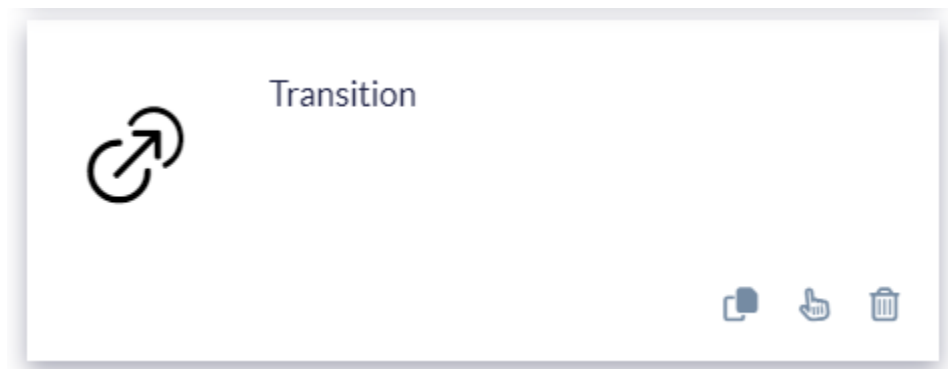
Save & Close

Save

Transition

The Transition Component

The Transition component is used to branch out to another State Box from the current one.



Configuration Fields

When configuring a Transition component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
State (Mandatory)	Select the State Box to branch out to from the drop-down list.

NAME

Transition

DESCRIPTION

CONDITION TYPE

× None

STATE

× Select value...

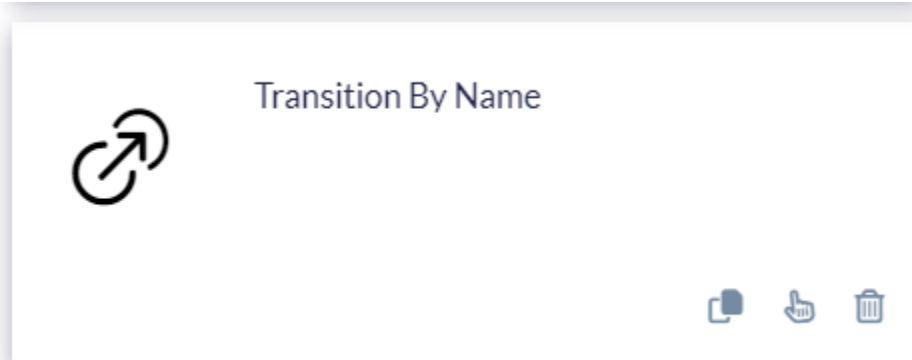
Close

Save & Close

Save

The Transition By Name Component

The Transition By Name component is used to branch out to another State Box from the current one. As opposed to the Transition component, it takes the name of the state as a variable and transitions the workitem to that state. It is important to note that the names of the states should not contain any spaces.



Configuration Fields

When configuring a Transition By Name component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
State (Mandatory)	Select the name of the state to branch out to. Can be hardcoded or passed as a variable.



NAME

Transition By Name

DESCRIPTION

CONDITION TYPE

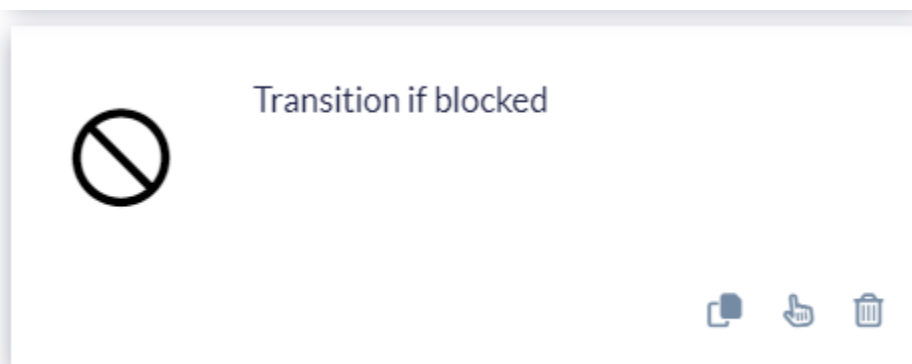
× None

STATE

Close Save & Close Save

The Transition if blocked Component

The Transition if blocked component is used to branch out to another State Box from the current one in the workflow. This one is used when a workitem is not able to transition to any other state from where it is in.



Configuration Fields

When configuring a Transition if blocked component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
State (Mandatory)	Select the State Box to branch out to from the drop-down list.

NAME

Transition if blocked

DESCRIPTION

CONDITION TYPE

× None ▼

STATE

× Select value... ▼

Close

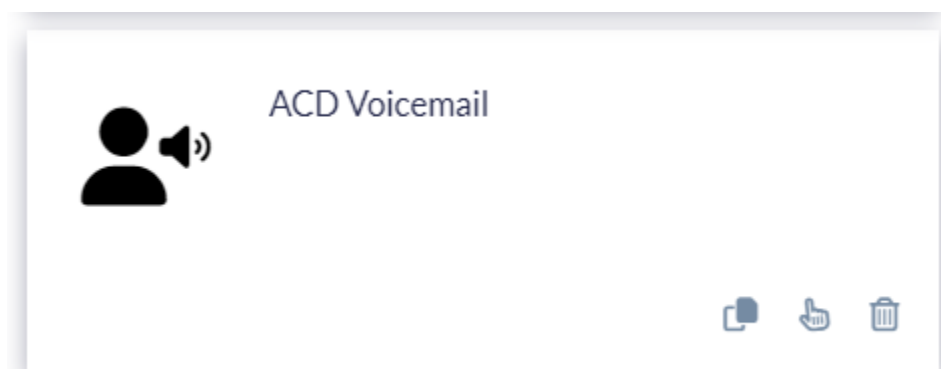
Save & Close

Save

Voice

The ACD Voicemail Component

The ACD Voicemail component is used to add the ACD Voicemail into the queue in order to be routed to the next available agent. This component is used in the ACD Voicemail Function. It creates a new workitem of type outbound call to be able to send it to a queue. A workitem of this type that is accepted by an agent opens up in the "in review" state until they click on the phone number to dial. There will be an additional panel in the workitem that holds the recorded Voicemail so that the agent can listen to it.



Configuration Fields

When configuring an ACD Voicemail Component in the Workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Transcription (Optional)	If enabled, the voicemail transcribed.
Queues (Mandatory)	Select the queue(s) this voicemail can be handled by from the list icon.
Priority (Mandatory)	The priority of the workitem in the queue.

NAME

ACD Voicemail

DESCRIPTION

TRANSCRIPTION

QUEUES

PRIORITY

x Select value...

CONDITION TYPE

Close

Save & Close

Save

The image shows a configuration form for the 'ACD Voicemail From Expression' component. At the top is a dark blue header bar with three icons: a hamburger menu, a calendar, and a list. Below the header, the form is organized into sections. The 'DESCRIPTION' section has a single-line text input field. The 'TRANSCRIPTION' section features a toggle switch that is currently turned off. The 'QUEUES' section contains a large, empty rectangular area with a list icon and a close button in the top right corner. Below this, the 'PRIORITY' section has a dropdown menu with the placeholder text 'x Select value...'. The 'CONDITION TYPE' section has a dropdown menu with the placeholder text 'x None'. At the bottom of the form are three buttons: 'Close' (light gray), 'Save & Close' (blue), and 'Save' (blue).

DESCRIPTION

TRANSCRIPTION

QUEUES

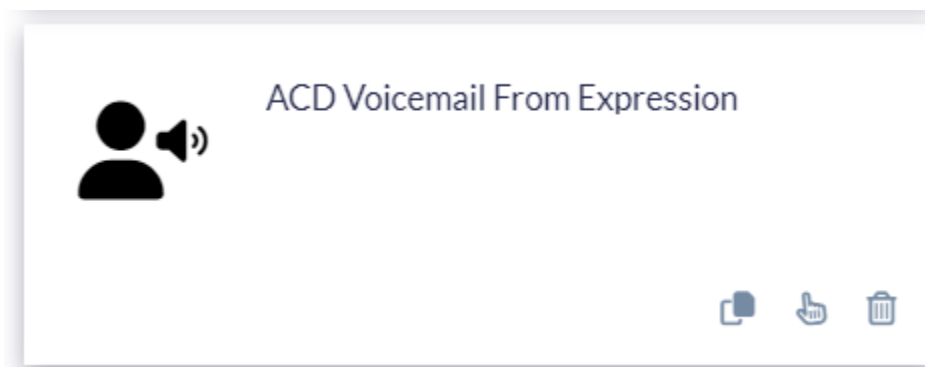
PRIORITY

CONDITION TYPE

Close Save & Close Save

The ACD Voicemail From Expression Component

Similar to the ACD Voicemail component, this component is used in ACD Voicemail flows to send a workitem to a queue. The flexibility provided by the expression part comes from dynamically assigning the queues to send the VM to based on prior workflow actions. Most often the queues are passed as a variable, though the list of identifiers of the queues may be hardcoded too.



Configuration Fields

When configuring an ACD Voicemail From Expression component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Priority (Mandatory)	The priority of the ACD Voicemail in those queues.
Queue Ids (Mandatory)	The identifier(s) that are to be used.
Number	The number that the customer wants to be called back on that is saved as a variable previously in the workflow. Example: <code>workitem.data.callbackNumber</code> (Variable that gets saved). This can be the number the customer called in on or it can be modified when the customer selects a different number.
From	The number the Nextiva Contact User will call in on. This can be a number or a variable like <code>\${workitem.to}</code> .



NAME

DESCRIPTION

TRANSCRIPTION
☐

PRIORITY

QUEUE IDS

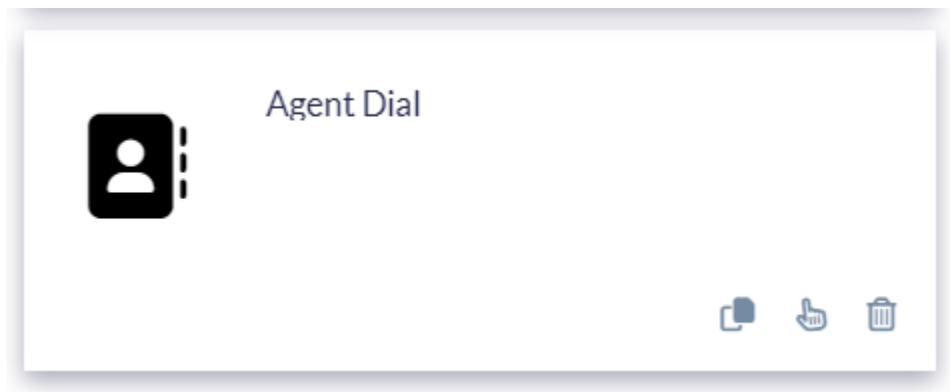
NUMBER

FROM

CONDITION TYPE

The Agent Dial Component

This component is used to create the workflows for remote agents, these are agents who do not work from a computer and will not be working on the Nextiva app. This functionality automatically dials a Remote Agent's PSTN number and will connect a workitem to the agent's endpoint when they pick up. This functionality is very workflow specific and it is recommendable to ask a member of the Nextiva team for support if it is to be implemented. This component is used only in Agent Remote Voice functions.



Configuration Fields

When configuring an Agent Dial component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

NAME

Agent Dial

DESCRIPTION

CONDITION TYPE

× None

Close

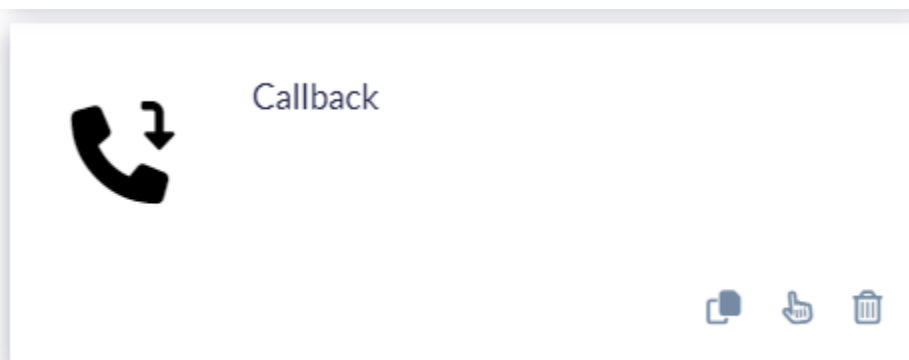
Save & Close

Save

The Callback Component

The Callback component can be used in long queue time workflows so that a caller is given a choice to be called back. The component will create an outbound call to the customer's phone and place this in the queue. An agent that receives this item from the queue will be in-review (to see contact details for example) and will have to dial by clicking on the phone number.

This component is used in the Callback Function that will prompt the caller to enter the phone number they would like to be called back on.



Configuration Fields

When configuring an Callback component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Number (Mandatory)	Enter the phone number or a variable name containing the phone number to be placed in the queue to be called back.
Queues (Mandatory)	Select the queue(s) this callback number can be handled by from the dropdown list.
Priority (Mandatory)	Select the priority to be set to callbacks.
From	The number you're going to be calling from.

Use Inbound Phone Number as ANI	If enabled, when placing the callback to the customer, the From number that will be used to call the customer back will be the same phone number that the customer called into.
To	The number that you're going to call. Usually it will be something like the variable, workitem.from which will capture the caller's phone number.

NAME

DESCRIPTION

NUMBER

QUEUES

PRIORITY

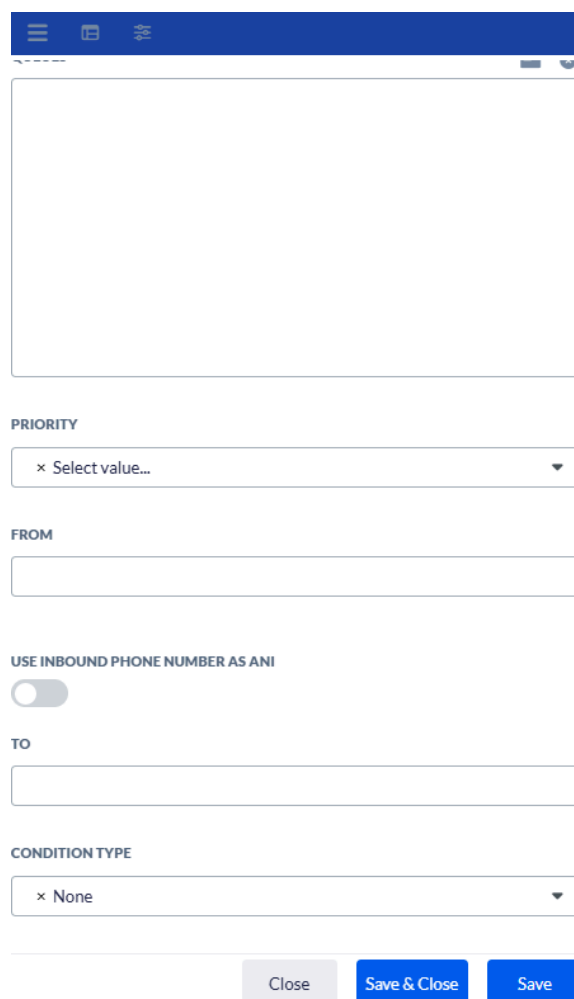
× Select value...

FROM

Close

Save & Close

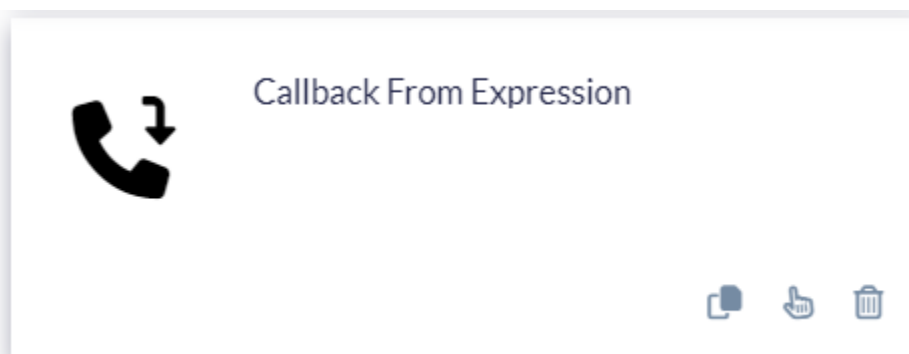
Save



The image shows a web-based configuration form for a 'Callback From Expression' component. At the top is a blue header bar with three icons: a menu, a calendar, and a list. Below the header is a large, empty rectangular box. The form contains several fields: a 'PRIORITY' dropdown menu with the text '× Select value...', a 'FROM' text input field, a 'USE INBOUND PHONE NUMBER AS ANI' toggle switch (currently turned off), a 'TO' text input field, and a 'CONDITION TYPE' dropdown menu with the text '× None'. At the bottom right of the form are three buttons: 'Close' (light gray), 'Save & Close' (blue), and 'Save' (blue).

The Callback From Expression Component

The Callback From Expression component can be used in long queue-time workflows so that a caller is given a choice to be called back. The component will create an outbound call to the customer's phone and place this in the queue. An agent that receives this item from the queue will be in-review (to see contact details for example) and will have to dial by clicking on the phone number. Using the By expression section allows you to pass the identifiers of the queues to which the callbacks are to be sent to as variables which can be hard-coded or set using JavaScript in the component. This gives flexibility to the workflow so that different queues can be used at different times by passing them as a variable.



Configuration Fields

When configuring an Callback From Expression component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Number (Mandatory)	Enter the phone number or a variable name containing the phone number to be placed in the queue to be called back.
From	The number you're going to be calling from.
Use inbound phone number as ANI	If enabled, when placing the callback to the customer, the From number that will be used to call the customer back will be the same phone number that the customer called into.
Queues (Mandatory)	The Ids of the queues this callback number can be handled by from the dropdown list.
Priority (Mandatory)	Select the priority to be set to callbacks.



NAME

DESCRIPTION

NUMBER

PRIORITY

× Select value... ▼

FROM

USE INBOUND PHONE NUMBER AS ANI
☐

QUEUE IDS

CONDITION TYPE

× None ▼

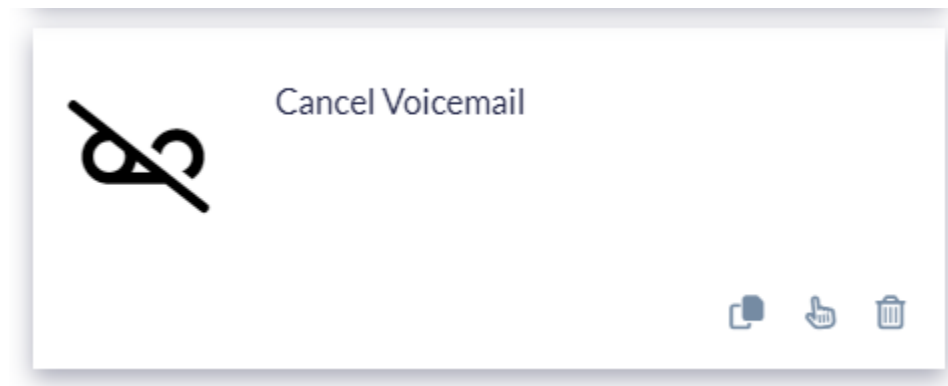
Close

Save & Close

Save

The Cancel Voicemail Component

This component triggers a cancellation of voicemail if one has been started. Usually takes a condition where the customer triggers this component by pressing '*'. This component can be used in functions to create voicemail flows of varying complexity, as can be seen in the example of the ACD VM function.



Configuration Fields

When configuring a Cancel Voicemail component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

NAME

Cancel Voicemail

DESCRIPTION

CONDITION TYPE

× None

Close

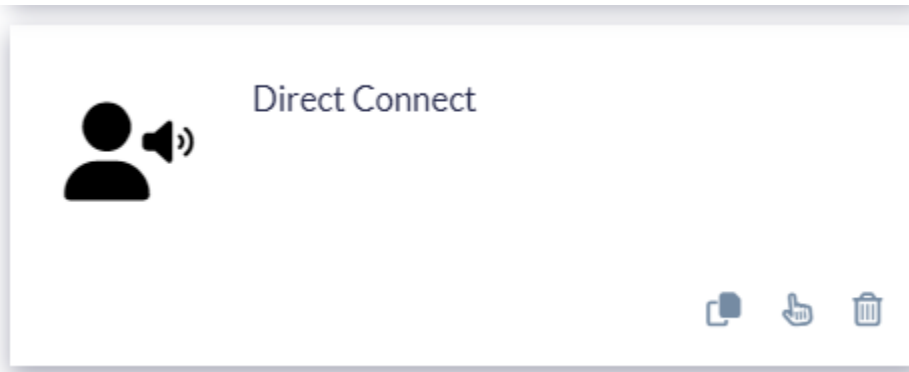
Save & Close

Save

The Direct Connect Component

This component is used to send an incoming call directly to a specific agent. It is used in incoming voice campaigns to be able to target an agent via their identifier (using the

selection), their direct number or extension by hard-coding of these values or by passing them as a variable previously saved in the workflow.



Configuration Fields

When configuring a Direct Connect component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
User Direct Number (Mandatory)	The direct number of the user in question, hard-coded or via variable.
Extension (Mandatory)	The direct extension number of the user in question, hard-coded or via variable.
User (Mandatory)	The extension of the user in question, hard-coded or via variable.
User ID Variable	Instead of selecting a particular user, you can use the user ID variable. The user ID variable must be captured earlier in the workflow. The benefit of doing this is that all direct connects, can be routed through the same workflow so that if you wanted to make a change in the workflow it would simultaneously happen across all direct connects. Example: A closed due to emergency message.

Notify User when there are Missed Calls(Optional)	True or false.
Variable Name (Optional)	Name of the variable that should save the result of Nextiva checking whether the extension (or Direct Number) that was passed to the component is valid or not. The result saved will say True or False and can be used in further workflow logic.
From (Optional)	The number that will be displayed as the agent when making calls. NOTE: This field must be filled for Nextiva Remote calls.

NAME

Direct Connect

DESCRIPTION

USER DIRECT NUMBER

EXTENSION

EMAIL

USER

USER ID VARIABLE

NOTIFY USER WHEN THERE ARE MISSED CALLS

×

Select value...

VARIABLE NAME

Close

Save & Close

Save

EXTENSION

EMAIL

USER

USER ID VARIABLE

NOTIFY USER WHEN THERE ARE MISSED CALLS

× Select value...

VARIABLE NAME

FROM

CONDITION TYPE

× None

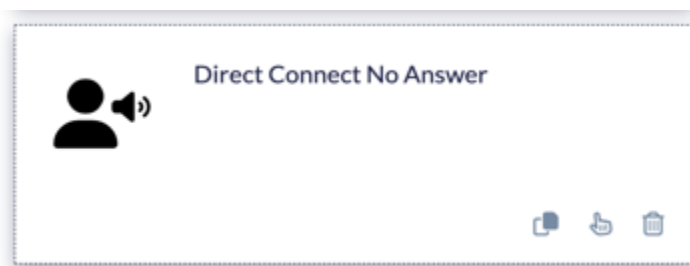
Close

Save & Close

Save

The Direct Connect No Answer Component

This component allows a direct call that is not answered to be transferred externally via a function.



Configuration Fields

When configuring a Direct Connect No Answer component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Function Identifier	The function the workflow should call





NAME

Direct Connect No Answer

DESCRIPTION

FUNCTION IDENTIFIER

Route to Queue with Callback



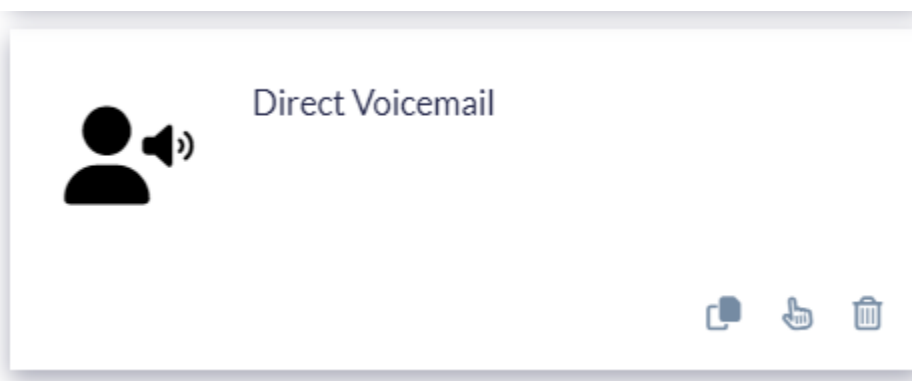

CONDITION TYPE

× None

▼

The Direct Voicemail Component

This component is most often used after a Direct Connect to Agent component. The Direct Voicemail Component sends an incoming voice call to be sent to a fixed user. There are 3 possible ways to select the agent to send the call to: by their direct number, their extension or by manually selecting them from the list. When this component is triggered, the customer will hear the Agent's personal greeting followed by the voicemail options.



Configuration Fields

When configuring a Direct Voicemail component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
User Direct Number (Mandatory)	The direct number of the user in question, hard-coded or via variable.
Extension (Mandatory)	The direct extension number of the user in question, hard-coded or via variable.
User (Mandatory)	The extension of the user in question, hard-coded or via variable.
Notify User when there (Optional)	True or false.
Variable Name (Optional)	Name of the variable that should save the result of Nextiva checking whether the

	extension (or Direct Number) that was passed to the component is valid or not. The result saved will say True or False and can be used in further workflow logic.
--	---

NAME

Direct Voicemail

DESCRIPTION

USER DIRECT NUMBER

EXTENSION

USER

NOTIFY USER WHEN THERE ARE MISSED CALLS

× Select value...

VARIABLE NAME

CONDITION TYPE

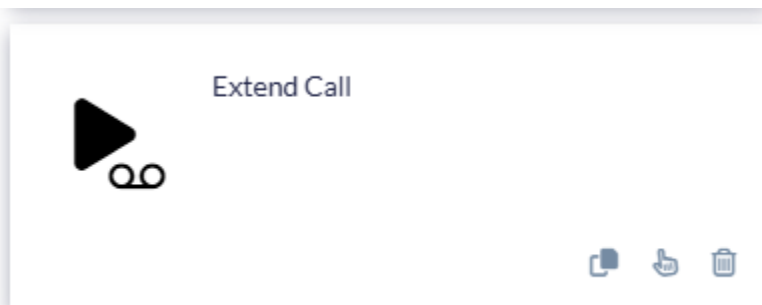
× None

Close

Save & Close

Save

The Extend Call Component



The Extend Call component is used if a user is speaking to a customer and terminates the call. Instead of terminating the call for the customer, the call is sent to a function. For example, the call could be sent to an after-call survey for the customer to rate the agent.

Configuration Fields

The Extend Call component will have the following fields:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Function Identifier (Mandatory)	The identifier of the function you want to send the call to.

NAME

Start

DESCRIPTION

Transition to another state

CONDITION TYPE

x None

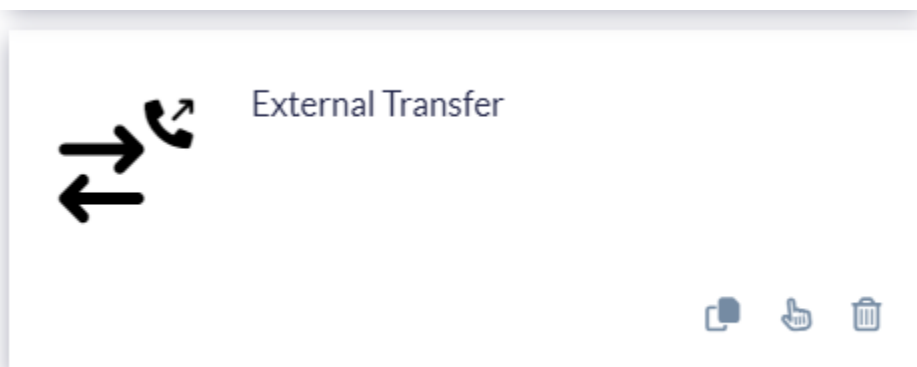
STATE

x End State

Close Save & Close Save

The External Transfer Component

This component is used to forward a call from the workflow to an external number. It does not create a conference call or disposition the workitem, so only use this when you are sure of who you are connecting the workitem to. For example, you can use an external transfer component in after hours workflows or for targeting specific personal mobile phones.



Configuration Fields

When configuring an External Transfer component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Number (Mandatory)	The external number to be dialed, passed as string or variable.
Extension (Mandatory)	The extension of the user in question, hardcoded or via variable.
From (Mandatory)	The Nextiva ANI that is to be presented to the external number, passed as a string or variable.
No Answer Timeout (Mandatory)	The amount of time for the external call to wait for an answer before ringing off.
Record Call (Optional)	Select this to record the external call.
State to Route Call on Connect Failure (Mandatory)	The workflow state to send the workitem to if the external call is not connected. The state must be in the current workflow.
On Success State	The workflow state to send the workitem to if the external call is successfully connected. The state must be in the current workflow.
External System (Mandatory)	Select True if calling into an external system instead of a person, select False if not.
SIP Headers	If using an external system, what's in the SIP Headers will be passed to the external system.
Agent	Enable, if you are transferring the workitem to an agent.
Disable Ringback	If enabled, when a call is transferred externally there will be no ringing sound, it will just be a direct connection.

NAME

External Transfer

DESCRIPTION

NUMBER

FROM

NO ANSWER TIMEOUT

×

Select value...

RECORD CALL

×

Select value...

STATE TO ROUTE CALL ON CONNECT FAILURE

×

Select value...

ON SUCCESS STATE

×

Select value...

EXTERNAL SYSTEM

×

Select value...

SIP HEADERS

Close

Save & Close

Save

FROM

NO ANSWER TIMEOUT

×

Select value...

RECORD CALL

×

Select value...

STATE TO ROUTE CALL ON CONNECT FAILURE

×

Select value...

ON SUCCESS STATE

×

Select value...

EXTERNAL SYSTEM

×

Select value...

SIP HEADERS

AGENT

DISABLE RINGBACK

CONDITION TYPE

×

None

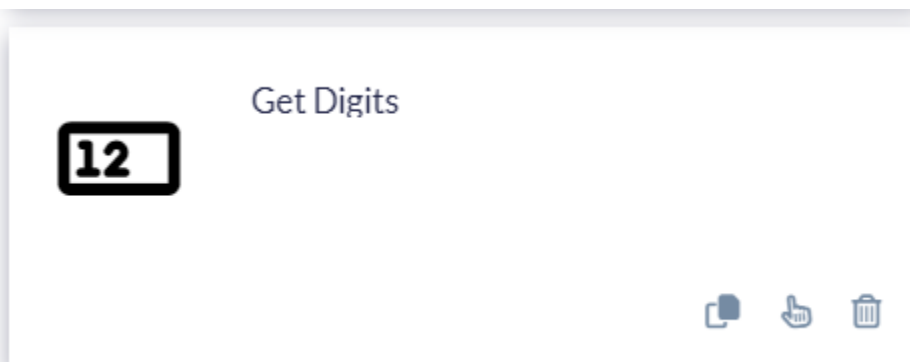
Close

Save & Close

Save

The Get Digits Components

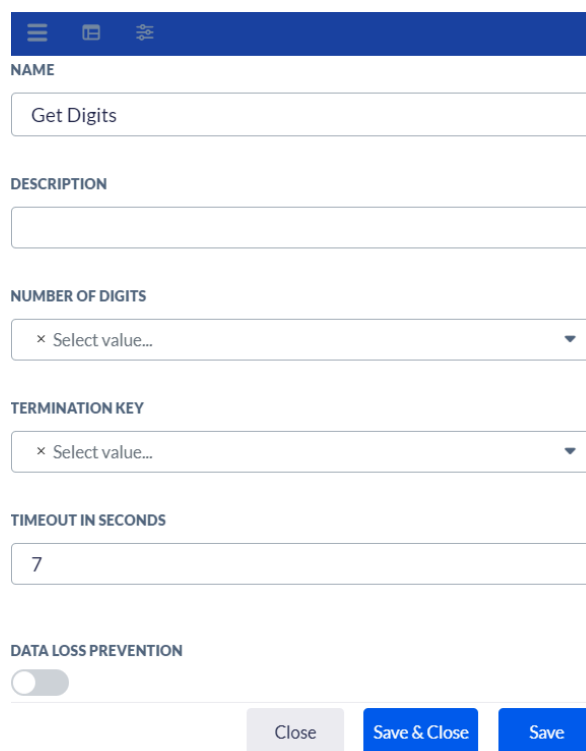
The Get Digits component is used to prompt the customer's phone to input numbers from its keyboard. This component is most often used after a play prompt where an option can be given and the customer is expected to select one. This component together with the play prompt acts as a Play and Collect Digits component but gives the flexibility of having them separately.



Configuration Fields

When configuring a Get Digits component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Number Of Digits (Mandatory)	The maximum expected number of digits that the customer will enter. If this number is reached then the Collect Digits is terminated.
Termination Key (Mandatory)	The termination key for the customer if they do not use the maximum digits expected.
Timeout In Seconds	How long do you want to allow the person to enter the digits. For example, if a person does not enter the required number of digits within 10 seconds, continue on in the workflow.
Data Loss Prevention	If you want to apply data loss prevention for data that you don't want stored in the database, such as credit card information.



The screenshot shows a configuration form for an 'Outbound Call Action'. It has a blue header bar with three icons: a menu, a calendar, and a person. The form fields are as follows:

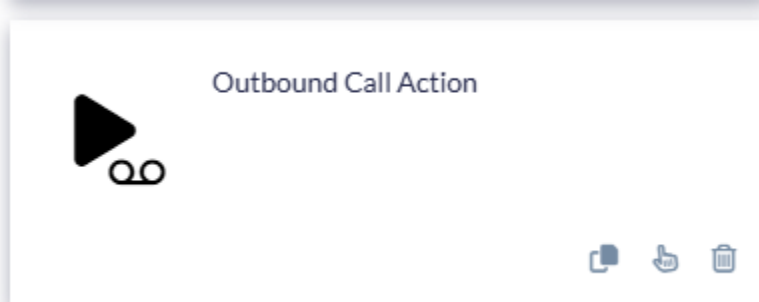
- NAME:** A text input field containing 'Get Digits'.
- DESCRIPTION:** An empty text input field.
- NUMBER OF DIGITS:** A dropdown menu with the placeholder text '× Select value...'.
- TERMINATION KEY:** A dropdown menu with the placeholder text '× Select value...'.
- TIMEOUT IN SECONDS:** A text input field containing the number '7'.
- DATA LOSS PREVENTION:** A toggle switch that is currently turned off.

At the bottom right of the form are three buttons: 'Close' (grey), 'Save & Close' (blue), and 'Save' (blue).

The Outbound Call Action Component

There's a feature for every outbound call you can call a workflow. Every time an agent requests an outbound call you can call the workflow. The workflow can do anything. The Outbound Call Action allows outbound calls, if it's not allowed it will be refused. The message is what's displayed on the agent's screen when the call is refused.

NOTE: This is used when you attach an outbound function to a campaign and will determine if you make the call or not. If not calling, another message can be received.



Configuration Fields

When configuring an Outbound Call Action component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Allow Outbound Call	If enabled, an outbound call will be made. If not, the call won't be made and the message in the message field will be displayed.
Message	If not allowing an outbound call, the message here will be displayed to the NCC user.

NAME

Outbound Call Action

DESCRIPTION

ALLOW OUTBOUND CALL

☐

MESSAGE

CONDITION TYPE

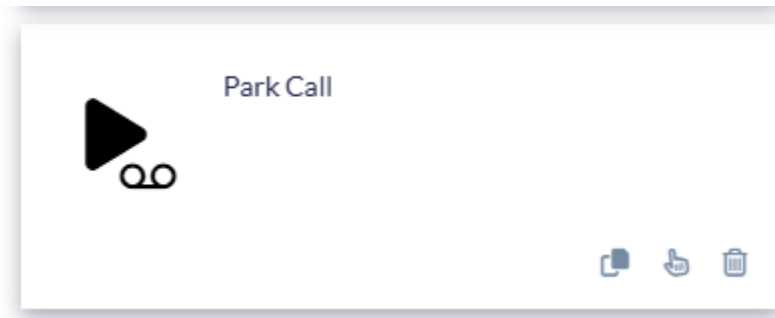
× None

Close

Save & Close

Save

The Park Call Component



Configuration Fields

When configuring a Park Call component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.



NAME

Park Call

DESCRIPTION

CONDITION TYPE

x None ▼

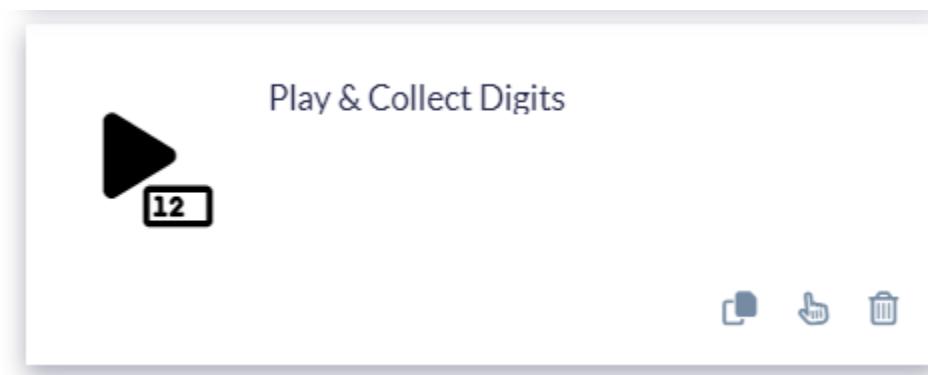
Close

Save & Close

Save

The Play & Collect Digits Component

Play & Collect Digits is an asynchronous component which simultaneously plays a prompt and is waiting for digit responses from the customer's keypad. This allows for the customer to interrupt the prompt (message) and insert the choice digits. It works as a combination of Play Prompt and Collect Digits and should be used in preference most times.



Configuration Fields

When configuring a Play & Collect Digits component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Loop (Mandatory)	The number of times to play the prompt to the user. Loops occur in a row, meaning that the prompt will play that number of times before moving on to the next component.
Number Of Digits (Mandatory)	The maximum expected number of digits that the customer will enter. If this number is reached then the Collect Digits is terminated.
Prompt (Mandatory)	Select the prompt from the list that is to be played to the customer.
Termination Key (Mandatory)	The termination key for the customer if they do not use the maximum digits expected.

Timeout In Seconds (Mandatory)	The amount of time from the start of this component to the timeout. If this is reached then the Collect Digits terminates.
Data Loss Prevention (Optional)	Toggle this option on if the Digits expected from the customer contain sensitive information such as Credit Cards or passwords.

NAME

Play & Collect Digits

DESCRIPTION

LOOP

× Select value...

NUMBER OF DIGITS

× Select value...

PROMPT

TERMINATION KEY

× Select value...

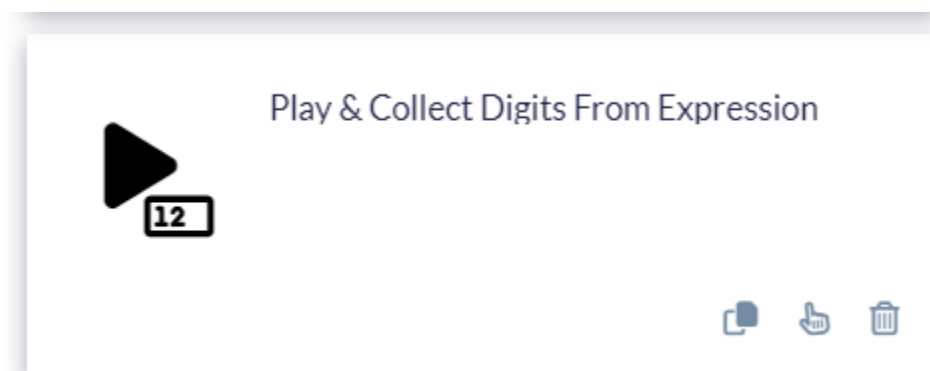
Close

Save & Close

Save

The Play & Collect Digits From Expression Component

The Play & Collect Digits From Expression component takes the ID of the prompt to be played instead of offering a list of prompts. This allows the prompt to be dynamically assigned in the workflow.



Configuration Fields

When configuring a Play & Collect Digits From Expression component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Loop (Mandatory)	The number of times to play the prompt to the user. Loops occur in a row, meaning that the prompt will play that number of times before moving on to the next component.
Number Of Digits (Mandatory)	The maximum expected number of digits that the customer will enter. If this number is reached then the Collect Digits is terminated.
Data Loss Prevention (Optional)	Toggle this option on if the Digits expected from the customer contain sensitive information such as Credit Cards or passwords.
Termination Key (Mandatory)	The termination key for the customer if they do not use the maximum digits expected.
Timeout In Seconds (Mandatory)	The amount of time from the start of this component to the timeout. If this is

	reached then the Collect Digits terminates.
Prompt Id (Mandatory)	The identifier of the prompt that is to be played to the customer. This may be hardcoded or passed as a variable.

NAME

Play & Collect Digits From Expression

DESCRIPTION

CONDITION TYPE

×

None

LOOP

×

Select value...

DATA LOSS PREVENTION

NUMBER OF DIGITS

×

Select value...

TERMINATION KEY

×

Select value...

TIMEOUT IN SECONDS

PROMPT ID

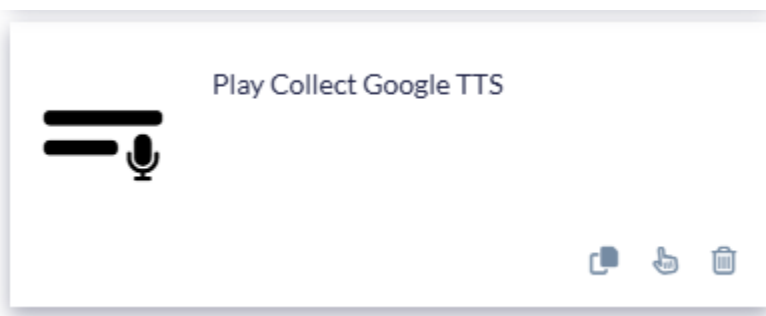
Close

Save & Close

Save

The Play Collect Google TTS Component

Google will take the message in this component and play it as a prompt to the customer. The message could include a variable that will be played to the customer.



Configuration Fields

When configuring a Play Collect Google TTS component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Voice	Google provided a list of voices, select the type of voice you want from the drop-down.
Gender	Select whether you want a male or a female voice.
Message	The message you want the component to play.
Number of Digits	The number of digits you want to capture.
Termination Key	Usually something like #. Once pressed digit collection will stop.
Timeout in Seconds	The number of seconds the system will wait to enter digits.
Data Loss Prevention	Toggle this option on if the Digits expected from the customer contain sensitive information such as Credit Cards or passwords.

NAME

Play Collect Google TTS

DESCRIPTION

VOICE

× Select value...

GENDER

× Select value...

MESSAGE

NUMBER OF DIGITS

× Select value...

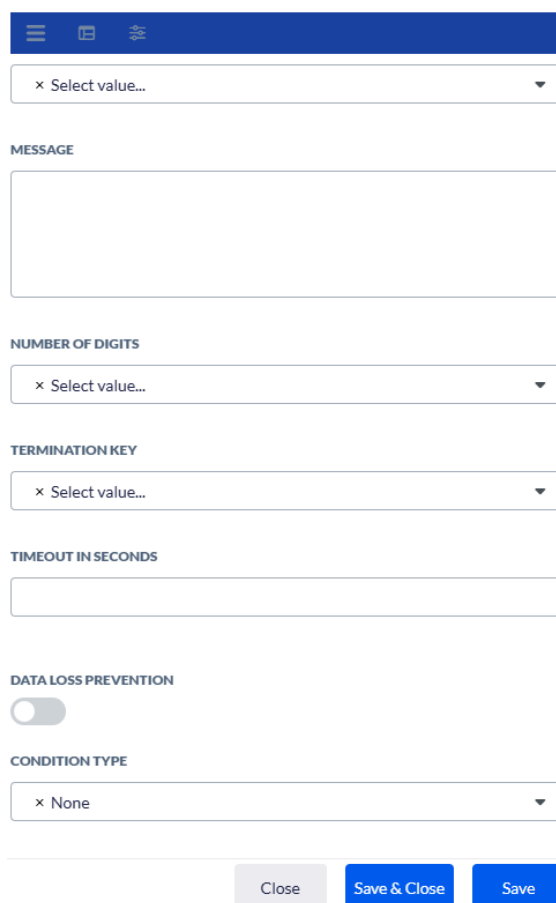
TERMINATION KEY

× Select value...

Close

Save & Close

Save



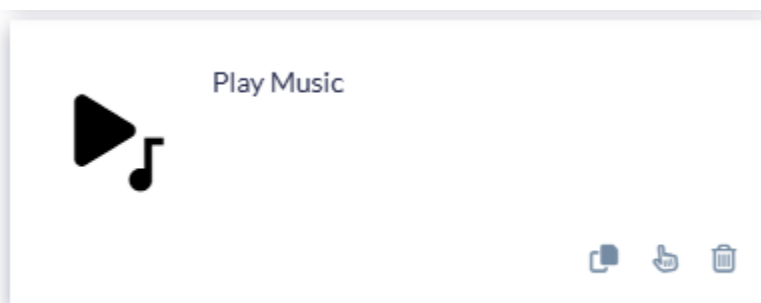
The screenshot shows a configuration window with a blue header bar containing three icons: a menu, a document, and a settings gear. Below the header is a dropdown menu with the text "x Select value...". The main content area is divided into several sections:

- MESSAGE**: A large, empty rectangular text box.
- NUMBER OF DIGITS**: A dropdown menu with the text "x Select value...".
- TERMINATION KEY**: A dropdown menu with the text "x Select value...".
- TIMEOUT IN SECONDS**: A large, empty rectangular text box.
- DATA LOSS PREVENTION**: A toggle switch that is currently turned off.
- CONDITION TYPE**: A dropdown menu with the text "x None".

At the bottom of the window, there are three buttons: "Close" (grey), "Save & Close" (blue), and "Save" (blue).

The Play Music Component

Primarily used for when a call enters a queue, instead of the caller sitting in silence, the system will play music.



Configuration Fields

When configuring a Play Music component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Music URL	Used in a Twilio environment and you select the URL from the dropdown
Music Library	Used in a FreeSwitch environment and must be created using prompts that are uploaded to the system.



NAME

DESCRIPTION

MUSIC URL

MUSIC LIBRARY



NUMBER OF DIGITS

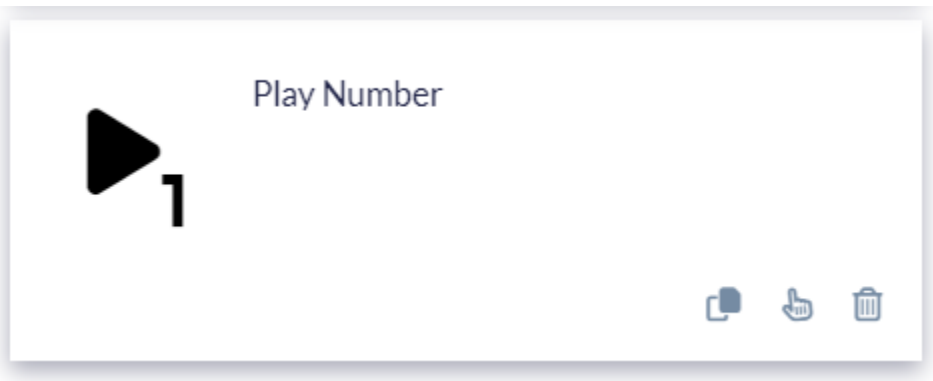
TERMINATION KEY

TIMEOUT IN SECONDS

CONDITION TYPE

The Play Number Component

The Play Number component plays a spoken number to the customer's phone line. This is particularly useful when a number is to be prompted to the customer to write down. For example a please call us back on 555-555-5555 could use this component.



Configuration Fields

When configuring a Play Number component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Number (Mandatory)	The number to be played to the customer, a digit at a time.

NAME

Play Number

DESCRIPTION

CONDITION TYPE

× None

NUMBER

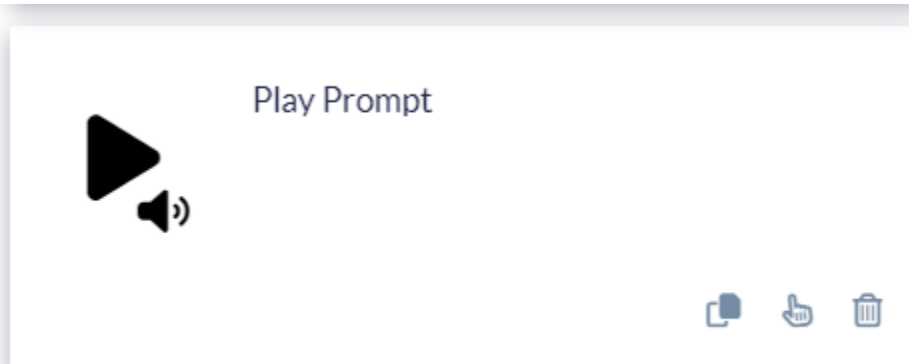
Close

Save & Close

Save

The Play Prompt Component

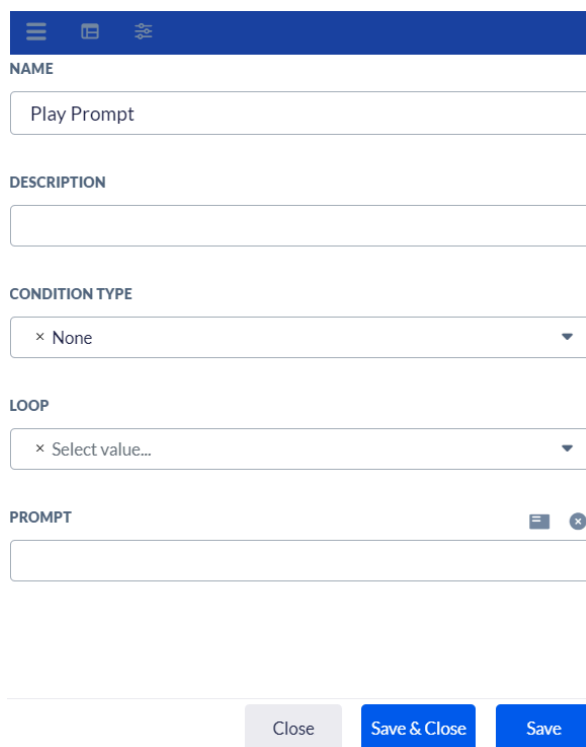
The Play Prompt component is used in IVR workflows for Voice campaigns. It will play a message to the customer. The Prompt object in the application contains all of the uploaded prompts that come standard with the system as well as any customised ones that can be created.



Configuration Fields

When configuring a Play Prompt component in the workflow, the following fields will be displayed:

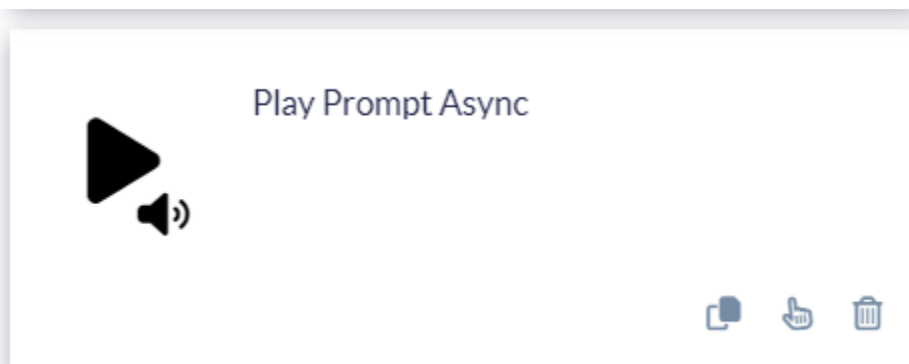
Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Loop	The number of times in a row that the message is to be played to the consumer.
Prompt	Select the desired prompt from the list.



The screenshot shows a configuration form for the 'Play Prompt Async' component. It has a dark blue header bar with three icons: a list, a document, and a speaker. Below the header, the form is organized into sections: 'NAME' with a text input containing 'Play Prompt'; 'DESCRIPTION' with an empty text input; 'CONDITION TYPE' with a dropdown menu showing '× None'; 'LOOP' with a dropdown menu showing '× Select value...'; and 'PROMPT' with a text input and a small icon of a document with a plus sign. At the bottom of the form are three buttons: 'Close' (light gray), 'Save & Close' (blue), and 'Save' (blue).

The Play Prompt Async Component

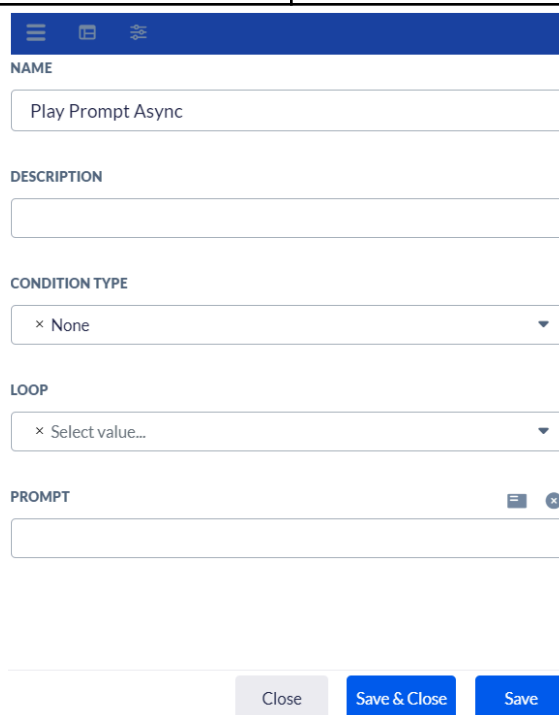
This component is very similar to the regular Play Prompt component, but the workflow will continue while the message is being played. This allows the workflow to simultaneously play the message to the customer and carry out other tasks at the same time. Careful consideration must be taken of the situation and other components inside a workflow that contains this component as transitions to other states may occur before the customer has had time to hear the entire prompt.



Configuration Fields

When configuring a Play Prompt Async component in the workflow, the following fields will be displayed:

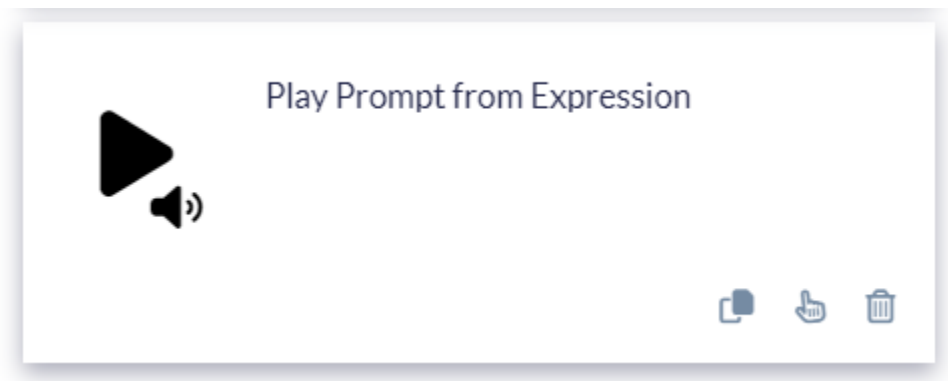
Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Loop	The number of times in a row that the message is to be played to the consumer.
Prompt	Select the desired prompt from the list.



The screenshot shows a configuration form for the 'Play Prompt Async' component. It features a blue header bar with three icons (list, card, and a gear). Below the header, the form is organized into sections: 'NAME' with a text input field containing 'Play Prompt Async'; 'DESCRIPTION' with an empty text input field; 'CONDITION TYPE' with a dropdown menu showing 'None'; 'LOOP' with a dropdown menu showing 'Select value...'; and 'PROMPT' with a text input field and a small icon to its right. At the bottom of the form are three buttons: 'Close', 'Save & Close', and 'Save'.

The Play Prompt from Expression Component

Similar to other by Expression components, this component will play the prompt that is passed to its prompt identifier field. This allows for dynamic assignment of the prompt in the workflow. This is used in Voice flows.



Configuration Fields

When configuring a Play Prompt from Expression component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Loop	The number of times in a row that the message is to be played to the consumer.
Prompt Id	Select the desired prompt from the list.

NAME

Play Prompt from Expression

DESCRIPTION

CONDITION TYPE

x None

LOOP

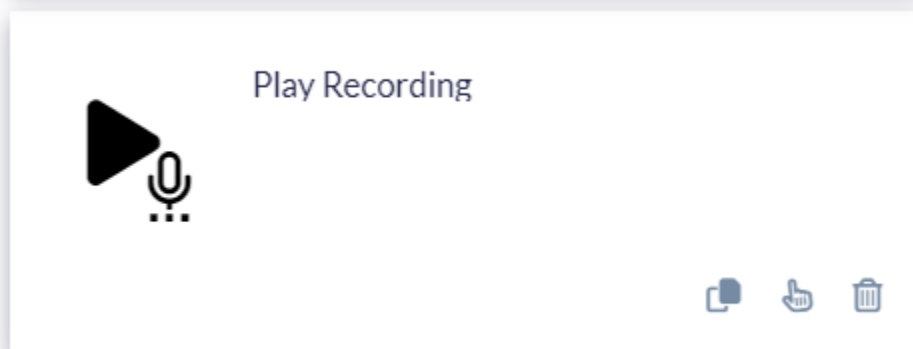
x Select value...

PROMPT ID

CloseSave & CloseSave

The Play Recording Component

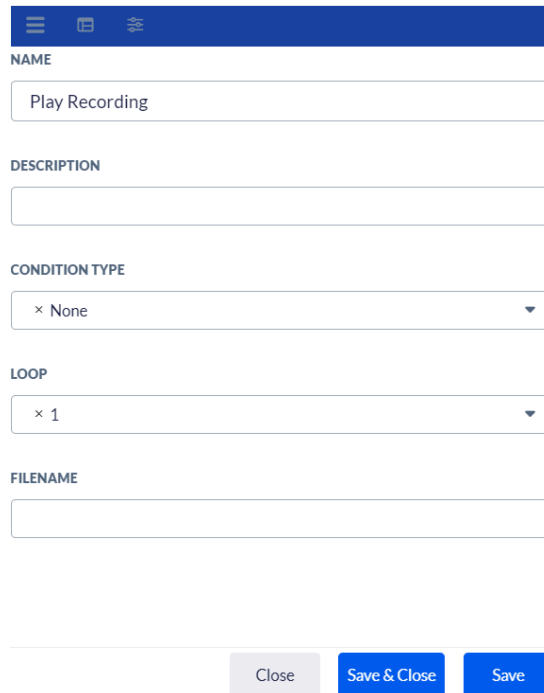
This component will play a previously recorded message to the customer. This is mostly used to play messages that a customer leaves back to them. For example, the ACD VM function allows a customer to leave a voicemail and then access a menu, in that menu they are prompted to choose between save recording, re-record, or listen to the recording which uses this component. Only used in Voice campaign workflows.



Configuration Fields

When configuring a Play Recording component in the workflow, the following fields will be displayed:

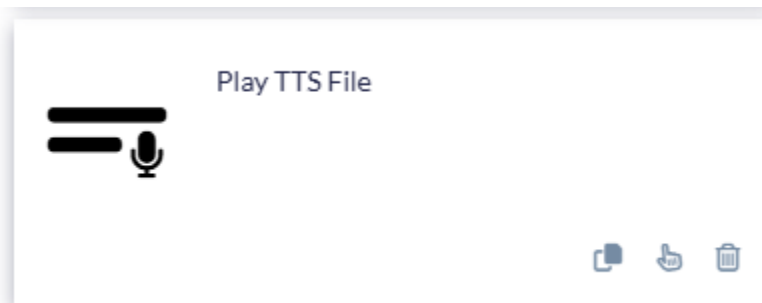
Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Loop	The number of times in a row that the message is to be played to the consumer.
Filename	The name of the file that was recorded. This can be hardcoded or passed as a variable. The name of recordings from the workflow can be found inside of the variable that saved the recording. Eg: <code>workitem.data.recordingVariable.filename</code>



A configuration form for a 'Play Recording' component. It features a blue header bar with three icons (list, grid, and a third icon). Below the header, the form has several fields: 'NAME' with a text input containing 'Play Recording'; 'DESCRIPTION' with an empty text input; 'CONDITION TYPE' with a dropdown menu showing '× None'; 'LOOP' with a dropdown menu showing '× 1'; and 'FILENAME' with an empty text input. At the bottom right, there are three buttons: 'Close' (grey), 'Save & Close' (blue), and 'Save' (blue).

The Play TTS File Component

This component plays the file that was previously created in the Prepare TTS Text component.



Configuration Fields

When configuring a Play TTS File component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

Filename	This should be the variable you created in Prepare TTS Text Component.: <u>workitem.data.name</u>
----------	--

NAME

Play TTS File

DESCRIPTION

FILENAME

CONDITION TYPE

x None

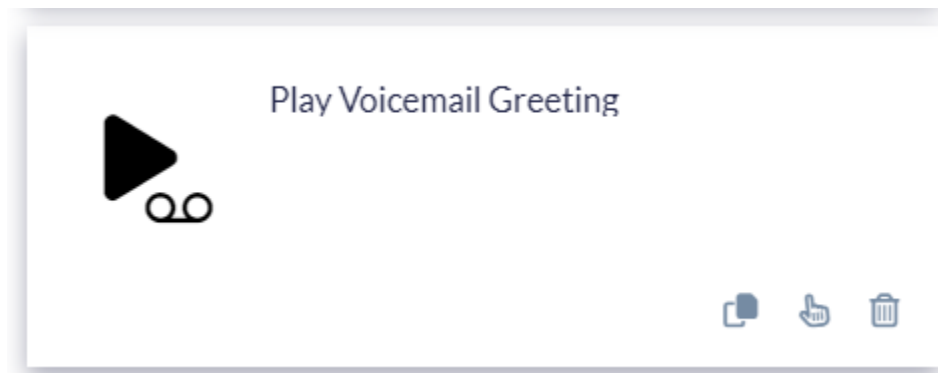
Close

Save & Close

Save

The Play Voicemail Greeting Component

This component is used to play agent-specific voicemail greetings. Every user in Thrio may record or upload a greeting in their User Settings, this file will be played to the customer in this component. This component is mostly used inside Voicemail Functions due to the fact that it will search for a User associated with the workitem. It is important to note that workitems that have been in queue but never reached an agent will not be able to execute this component.



Configuration Fields

When configuring a Play Voicemail Greeting component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.

NAME

Play Voicemail Greeting

DESCRIPTION

CONDITION TYPE

× None

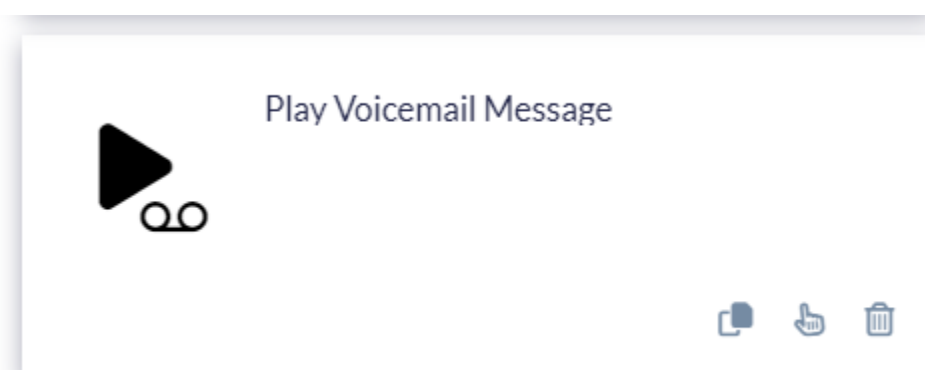
Close

Save & Close

Save

The Play Voicemail Message Component

This component will play the Voicemail drop MP3 file for a particular user to the customer. This is best used in Voice functions where an agent can push this file to be played into a customers voicemail and thereby free themselves from leaving a message every time. It improves the speed at which an agent can rotate through workitems when predictive dialing and reaching a customer's Answering Machine. Most often this component is used with the identifier of the user being passed as `workitem.data.userId` so that a Survey can be built that works for all agents.



Configuration Fields

When configuring a Play Voicemail Message component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
User (Mandatory)	Select a user from the list.
User as Variable (Mandatory)	Pass the identifier of the user. Can be hard coded or via variable, Eg. <code>workitem.data.userId</code> .

NAME

Play Voicemail Message

DESCRIPTION

USER

USER AS VARIABLE

CONDITION TYPE

× None

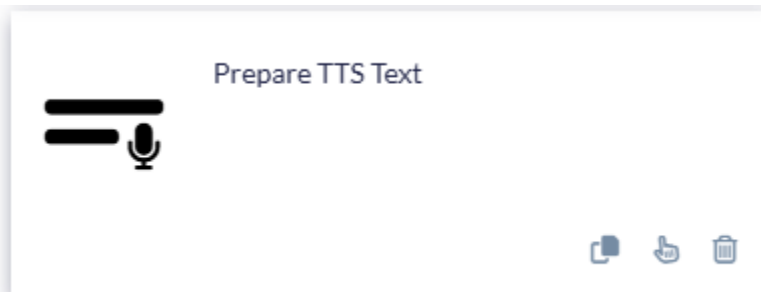
Close

Save & Close

Save

The Prepare TTS Text Component

This component prepares files that will be read to the customer as text-to-speech and saves the file as a variable. This is done to avoid silences while waiting for text-to-speech results.



Configuration Fields

When configuring a Prepare TTS Text component in the workflow, the following fields will be displayed:

Field Name	Description
------------	-------------

Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Voice	Which voice you want to read the message.
Message	The message to be read to customers.
Filename	An mp3 file that will be played to customers. This is the file being prepared.
Response Variable	This is where you store the variable for that will be used in the Play TTS File component.

NAME

Prepare TTS Text

DESCRIPTION

VOICE

× Select value...

MESSAGE

FILENAME

RESPONSE VARIABLE

CONDITION TYPE

× None

Close

Save & Close

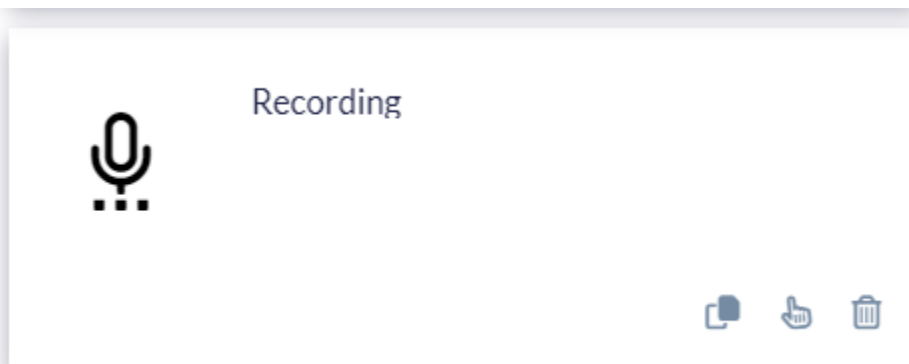
Save

The Recording Component

The Recording component is used to prompt the customer to leave a message. It will record their leg of the conversation into an MP3 file which will be associated with the workitem and can be handled by the workflow in later components. To play the

recording back use the filename that is found inside of the recording object. The recording object will have a filename and a duration attribute inside it, which can then be accessed. For example: if the variable name is acdvm then the mp3 file can be accessed using the following notation:

Workitem.data.acdvm.filename



Configuration Fields

When configuring a Recording component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Max Length In Seconds (Mandatory)	The maximum duration of the recording. Recording will stop when this limit is reached.
Play Beep Before Recording (Optional)	Toggle on to play the beep that warns a customer that recording has begun.
Silence Timeout In Seconds (Mandatory)	If the customer stops speaking, the component can check the number of seconds of silence and stop the recording.
Termination Key (Optional)	The key that the customer may press to indicate that they have finished the message and to stop the recording.

Trim Recording (Optional)	Trims silence from either end of the recording to shorten the file.
Variable Name (Mandatory)	The variable inside which the recording object is to be saved for later handling in the workflow.

NAME

Recording

DESCRIPTION

MAX LENGTH IN SECONDS

PLAY BEEP BEFORE RECORDING

SILENCE TIMEOUT IN SECONDS

TERMINATION KEY

×

Select value...

TRIM RECORDING

VARIABLE NAME

CONDITION TYPE

×

None

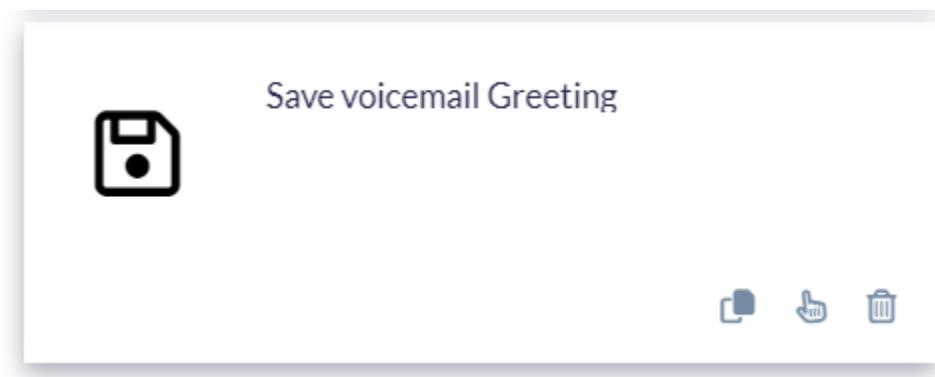
Close

Save & Close

Save

The Save voicemail Greeting Component

This component is currently only used in the Voicemail Greeting Recording function. This function is found in all user's user settings in the avatar menu. Using this function, an agent may record a personal voicemail greeting. In particular this component is used to save the recording as an mp3 file for the agent associated with the function call.



Configuration Fields

When configuring a Save voicemail Greeting component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Filename (Mandatory)	The name of the file that was recorded. This can be hardcoded or passed as a variable. The name of recordings from the workflow can be found inside of the variable that saved the recording. Eg: <code>workitem.data.recordingVariable.filename</code>

NAME

Save voicemail Greeting

DESCRIPTION

FILENAME

CONDITION TYPE

× None

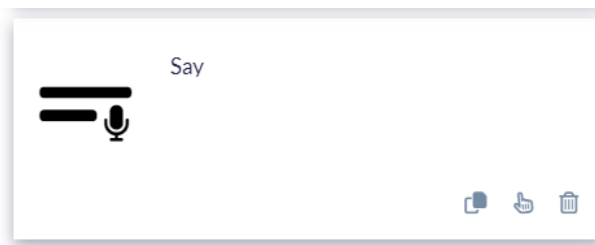
Close

Save & Close

Save

The Say Component

Using Nextiva’s native TTS service, this component is used in a similar way to the Google TTS component and will play a text message to a customer’s phone. The message may take variables therefore changing the content of the message dynamically.



Configuration Fields

When configuring a Say component in the workflow, the following fields will be displayed:

Field Name	Description
------------	-------------

Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Gender (Mandatory)	The selected gender of the voice that plays the message to the customer.
Language (Mandatory)	The language that the text is in.
Loop (Mandatory)	The number of times in a row that the message is to be played to the customer.
Text (Mandatory)	The message that is to be played.

NAME

Say

DESCRIPTION

CONDITION TYPE

× None

GENDER

× man

LANGUAGE

× Select value...

LOOP

× 1

TEXT

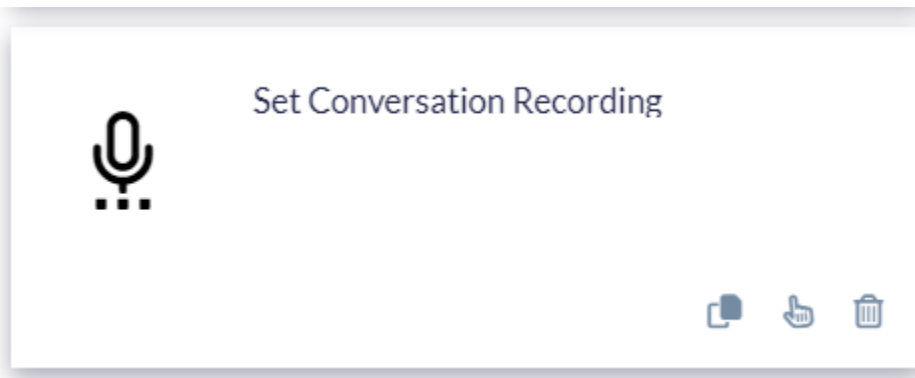
Close

Save & Close

Save

The Set Conversation Recording Component

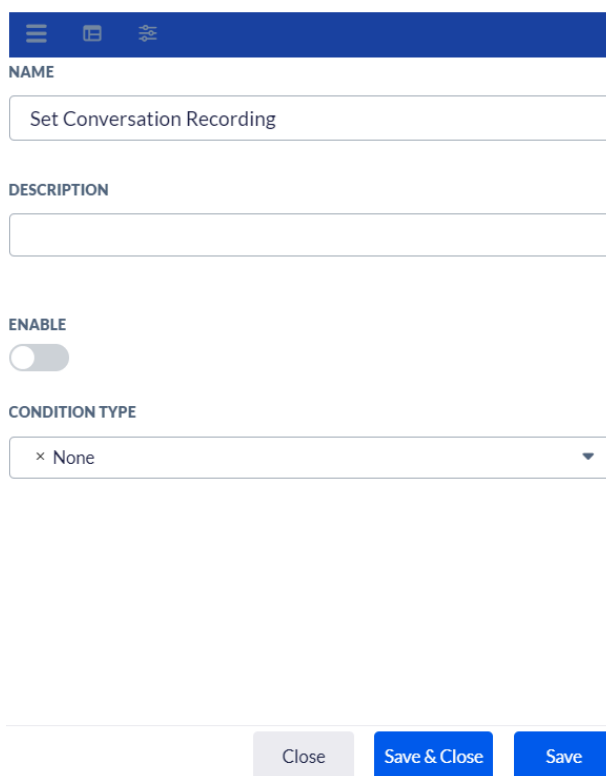
This component allows the workflow to toggle the recording on and off in an IVR. It is possible to set the recording of a call on or off based on a consumer's choices. When the toggle is on the call is recorded, when off it is not. For example: a campaign may need customer party consent to start the recording, and as such a customer should be prompted to accept or not to the recording of the call using a play and collect digits, and based on the digit result the component is toggled on or off.



Configuration Fields

When configuring a Set Conversation Recording component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Enable (Mandatory)	Toggle on to record the call, off to stop recording the call.



The screenshot shows a configuration form with a blue header bar containing three icons: a menu, a calendar, and a speech bubble. The form has the following sections:

- NAME**: A text input field containing "Set Conversation Recording".
- DESCRIPTION**: An empty text input field.
- ENABLE**: A toggle switch currently in the "off" position.
- CONDITION TYPE**: A dropdown menu showing "× None".

At the bottom of the form are three buttons: "Close" (grey), "Save & Close" (blue), and "Save" (blue).

The State Abbreviation Component

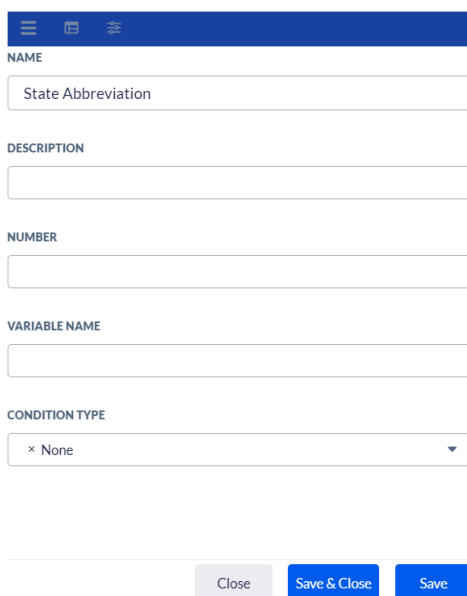
This component is used to extract the state from a phone number. It will save the abbreviation of the state, eg. FL for Florida in the variable specified. This can be used to save data for reporting purposes or for intelligent routing of the workitem. For example, a group of agents may handle East Coast sales and thus a workitem that comes in with a Florida ANI can be routed to this team.



Configuration Fields

When configuring a State Abbreviation component in the workflow, the following fields will be displayed:

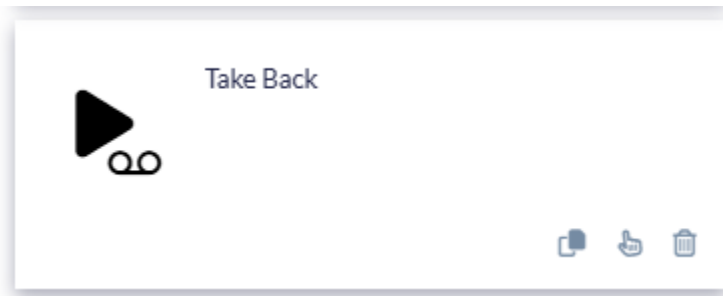
Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.
Number (Mandatory)	The ANI from which the state is to be extracted.
Variable Name (Mandatory)	The variable inside workitem data in which the state abbreviation is to be saved.



The screenshot shows a configuration form for a State Abbreviation component. It has a blue header bar with three icons (hamburger menu, document, and list). Below the header, the form is organized into sections with labels in all caps: NAME, DESCRIPTION, NUMBER, VARIABLE NAME, and CONDITION TYPE. Each section has a corresponding input field. The NAME field contains the text 'State Abbreviation'. The DESCRIPTION, NUMBER, and VARIABLE NAME fields are empty. The CONDITION TYPE field is a dropdown menu with '× None' selected. At the bottom of the form, there are three buttons: 'Close' (light gray), 'Save & Close' (blue), and 'Save' (blue).

The Take Back Component

This component takes back a call to where it came from when there's an issue transferring it.



Configuration Fields

When configuring a Translate component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type	The generic fields as seen in the introduction.



NAME

Take Back

DESCRIPTION

CONDITION TYPE

× None ▼

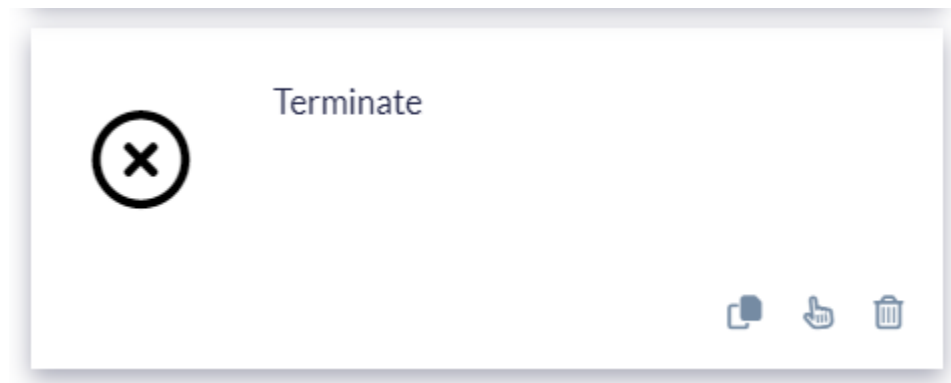
Close

Save & Close

Save

The Terminate Component

This component terminates the workitem, sending it to the wrap-up state (if applied) and then processes the workitem for storage in the historical database. Most often used in the End state, but can also be used after specific functions that terminate items. It should be used exclusively at the end of workflows.



Configuration Fields

When configuring a Terminate component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, Condition Type (Optional)	The generic fields as seen in the introduction.



NAME

DESCRIPTION

CONDITION TYPE

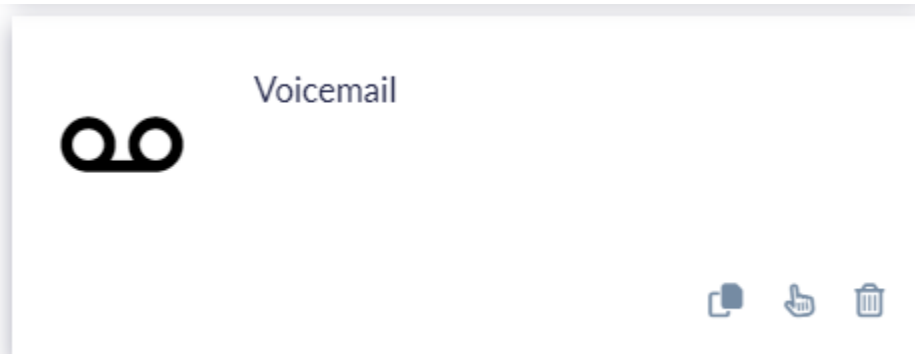
× None

▼

[Close](#)[Save & Close](#)[Save](#)

The Voicemail Component

This component is used at the end of workflows to trigger voicemail functions in Voice workflows. This component will start the voicemail system function for a direct to agent call. For best practices use this component only after a Direct Connect and a Timer Components. It will initiate the voicemail process for that user.



Configuration Fields

When configuring a Voicemail component in the workflow, the following fields will be displayed:

Field Name	Description
Name, Description, (Optional)	The generic fields as seen in the introduction.

NAME

Voicemail

DESCRIPTION

Close

Save & Close

Save