NEXTIVA CONTACT CENTER

CALL CENTER

SUPERVISOR

WORK DAY QUICK START GUIDE

SERVICE DELIVERY CUSTOMER TRAINING
VERSION 1.0

nextiva

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NCC Supervisor Work Day Quick Start Guide

Introduction

Welcome to the NCC Supervisor Work Day Quick Start Guide! As a supervisor, you play a vital role in ensuring smooth contact center operations, efficient team management, and exceptional customer service. This guide will equip you with the knowledge and tools to excel in your role as you start your day.

This guide covers key aspects of the supervisor experience:

- Access the Supervisor Dashboard
- Understanding Key Supervisor Dashboard Metrics
- Utilizing the Supervisor Dashboard to monitor and assist agents
- Assisting an Agent live with Agent Assistance

XBert Tip: For information on call functionality and other supervisor tools, refer to the NCC Supervisor Getting Started Guide.

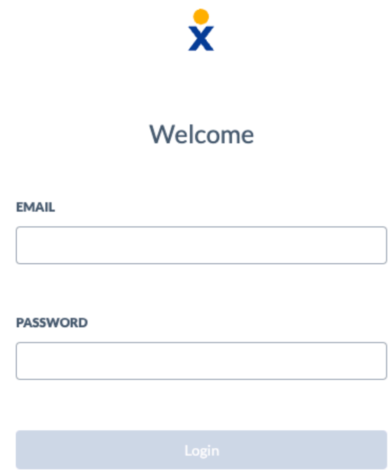
Self-Guided Setup

Logging In

1. Visit nextiva.thrio.io to access NCC.

   XBert Tip: Using Google Chrome web browser will ensure the best possible experience and avoid any potential issues or errors.

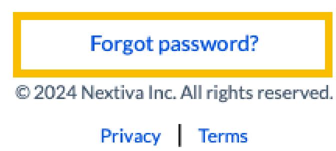
2. Enter email address and password. Select **Login**.

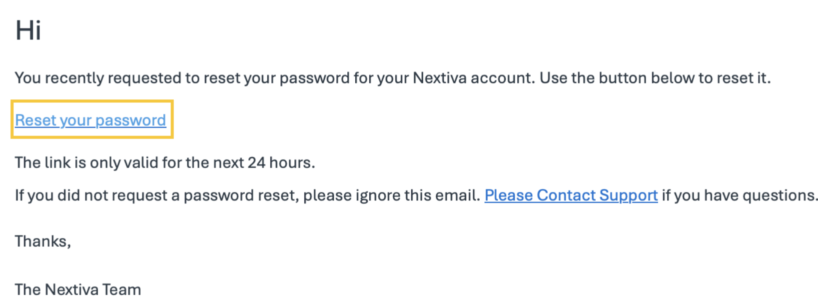


3. If it is your **first time logging in** or to **reset your password**, select **Forgot Password?**

   a. Find the Reset Password email sent from no-reply@nextiva.com

   b. Select the **Reset Your Password link.**

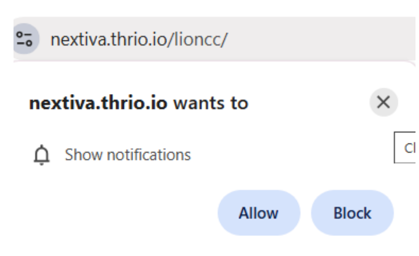




   c. **Follow the prompts** to reset the password within **24 hours** of receiving the email. If **24 hours passes**, select **"Forgot Password"** again.

Audio

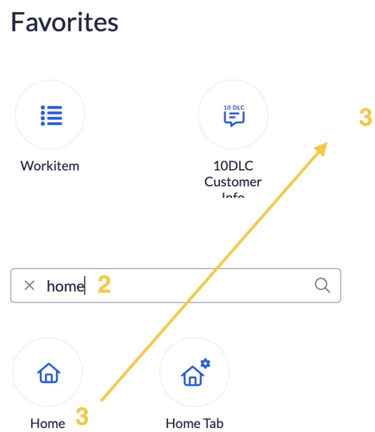
Upon logging in, you must allow **Chrome** to have **access to the microphone**. This is what will allow you to communicate with your headset or computer speakers. Chrome audio access will be based on your **computer's settings**.



Navigation Favorites

Add Home to Favorites

1. Select the **Options** icon (three lines) in the top left corner.
2. In the search bar, type “home” (NOT “home tab” icon).

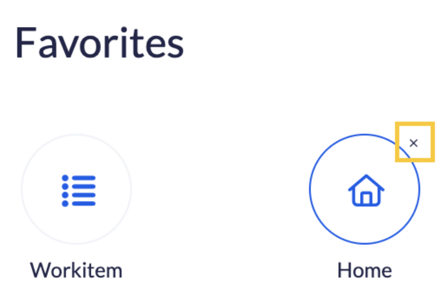


3. Click and drag the icon up to **Add to Favorites**.

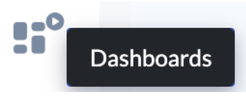
XBert Tip: Adding icons to your favorites list creates shortcuts for those items in the handy sidebar, making them easily accessible whenever you need them.

Removing Icons from Favorites

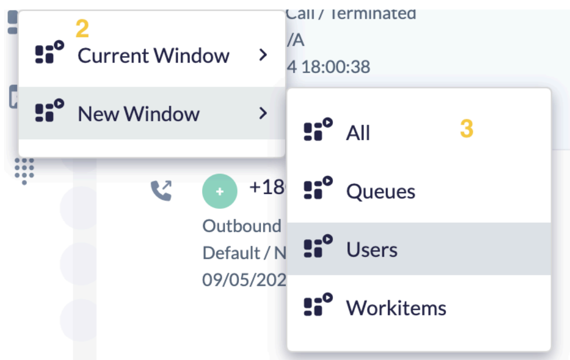
1. Select the **Options** icon to open favorites.
2. Hover over the icon you want to remove from favorites.
3. Select the **x** that populates by the icon.



Opening a Dashboard



1. Select the **Dashboard icon** at the from the left menu toolbar.
2. **Choose your opening preference.** A pop-up or dropdown menu appears, offering where to open the dashboard:
    a. **Current Window**: replacing your current view
    b. **New Window**: opening in a separate tab or window. Each dashboard will appear in a separate tab in your browser.
3. **Select the desired dashboards.**
    a. **All dashboards** open all dashboards assigned to your user profile.
    b. **Specific dashboard** open the selected dashboard from the list.



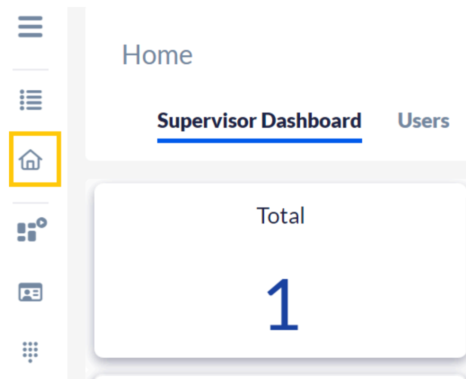
XBert Tip: If you select **All** in **Current Window**, you can click and drag each window so as to view all dashboards simultaneously.

Supervisor Dashboard

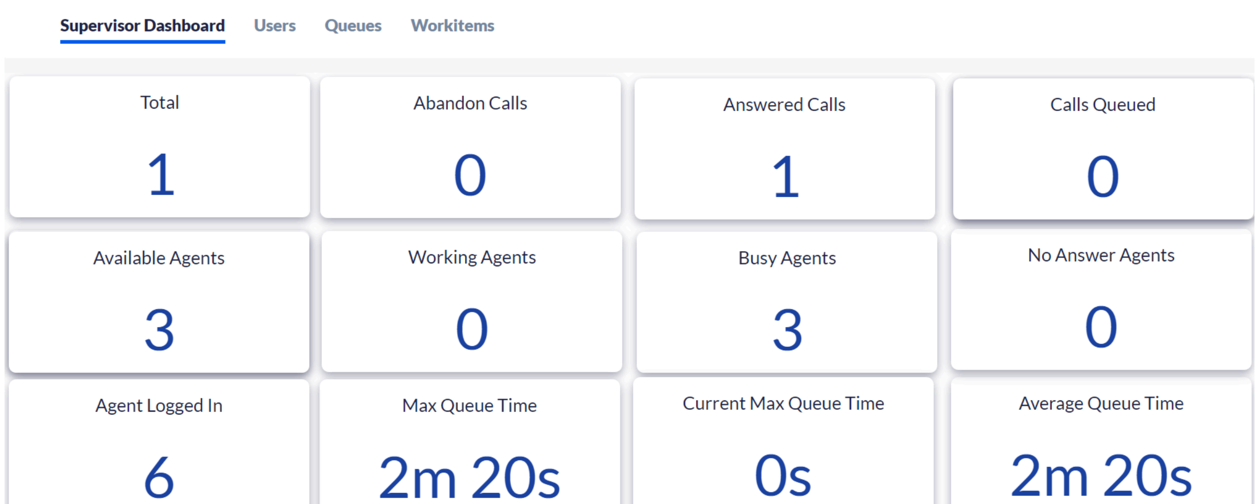
Your Supervisor Dashboard is your central hub for monitoring agent activity.

Access the Supervisor Dashboard

Select the **home icon** from your favorites toolbar.



XBert Tip: If home is not on your favorites toolbar, refer to [Add Home to Favorites](#).

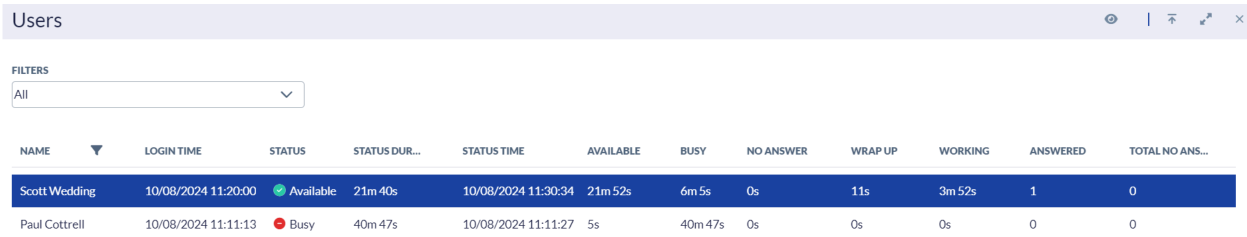


Key Supervisor Dashboard Metrics

- **Total:** Total number of workitems/calls.
- **Abandon Calls:** Total number of abandoned calls (meaning that the caller hung up before the call was answered.)
- **Answered Calls:** Total number of calls answered.
- **Calls Queued:** Total number of calls that are currently waiting in queue.
- **Available Agents:** Total number of agents that are currently in the Available status.
- **Working Agents:** Total number of agents that are currently in the Working status (for calls, this means the agent is currently on the call.)
- **Busy Agents:** Total number of agents that are currently in the Busy status (meaning that they are not available for workitems/calls at this current time.)
- **No Answer Agents:** Total number of agents that are currently in the No Answer status (meaning they were presented with a workitem/call that went unanswered, setting their status to No Answer until they change it.)
- **Agent Logged In:** Total number of agents signed in, regardless of current status.
- **Max Queue Time:** The time of the LONGEST workitem/call that has waited in queue.
- **Current Max Queue Time:** The time of the longest workitem/call that is CURRENTLY in queue.
- **Average Queue Time:** The average amount of time workitems/calls spent waiting in queue.

Users

You can add/remove columns by right clicking the header, and can reorder columns by clicking and dragging. For more information, refer to the NCC Supervisor Getting Started Guide.


Users

FILTERS

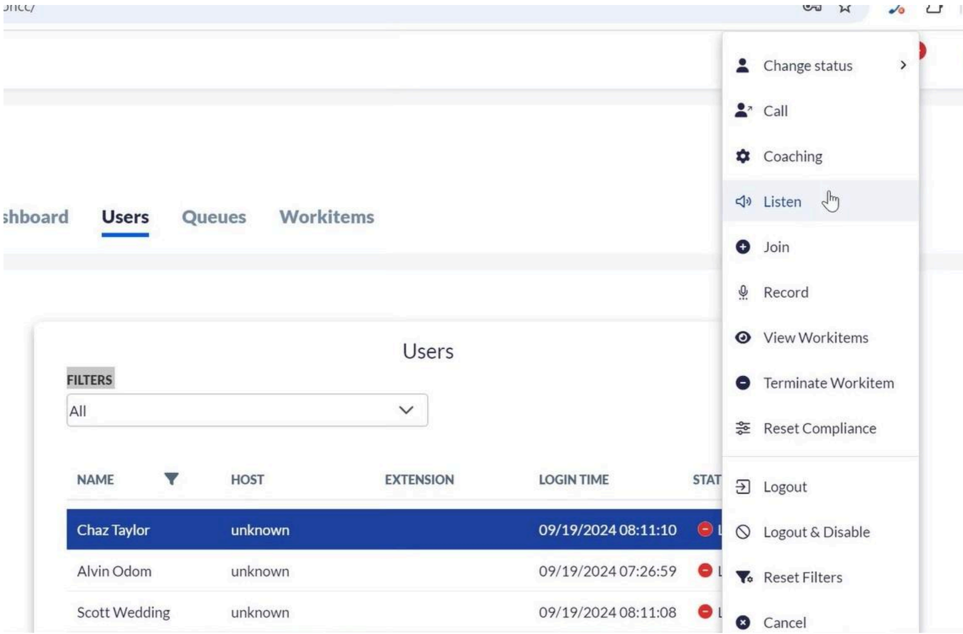
All

NAME	LOGIN TIME	STATUS	STATUS DUR...	STATUS TIME	AVAILABLE	BUSY	NO ANSWER	WRAP UP	WORKING	ANSWERED	TOTAL NO ANS...
Scott Wedding	10/08/2024 11:20:00	Available	21m 40s	10/08/2024 11:30:34	21m 52s	6m 5s	0s	11s	3m 52s	1	0
Paul Cottrell	10/08/2024 11:11:13	Busy	40m 47s	10/08/2024 11:11:27	5s	40m 47s	0s	0s	0s	0	0

Key User Metrics

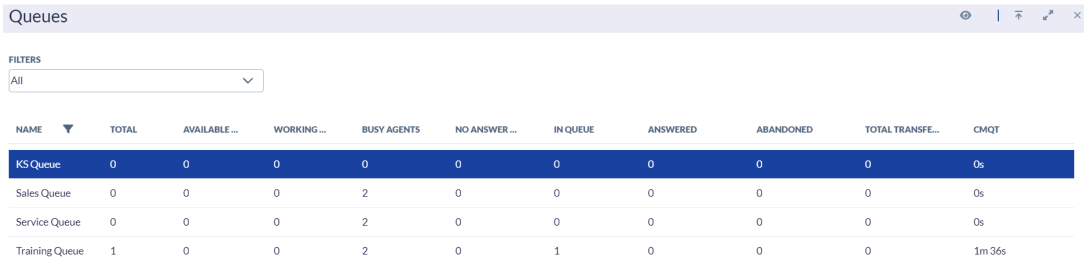
- **Name:** Name of the agent
- **Login Time:** Timestamp of exact time the agent logged in
- **Status:** Current status of the agent (Available, Busy, No Answer)
- **Status Duration:** The amount of time the agent has been in their current status
- **Status Time:** Timestamp of when agent changed to current status
- **Available:** Amount of time spent in the Available status so far today
- **Busy:** Amount of time spent in the Busy status so far today
- **No Answer:** Amount of time spent in the No Answer status so far today
- **Wrap-Up:** Amount of time spent in the Wrap-Up status so far today
- **Working:** Amount of time spent in the Working status so far today
- **Answered:** Number of workitems/calls answered by the agent so far today
- **Total No Answer:** Number of workitems/calls that were presented to agent with no answer so far today

User Right-Click Menu Options



- **Change Status:** Manually update the agent's status
- **Call:** Initiate a call to the agent
- **Coaching:** Listen to a live conversation and provide whispered feedback to the agent (customer cannot hear)
- **Listen:** Silently monitor a live conversation
- **Join:** Join an ongoing call as a third party
- **Record:** Start or stop recording an agent's interactions **not used
- **View Workitems:** See the tasks the agent is currently handling
- **Terminate Workitem:** End an ongoing call or task
- **Logout:** logs the agent out of the queue(s)
- **Reset Filters** resets your search filters

Queues


Queues

FILTERS

All

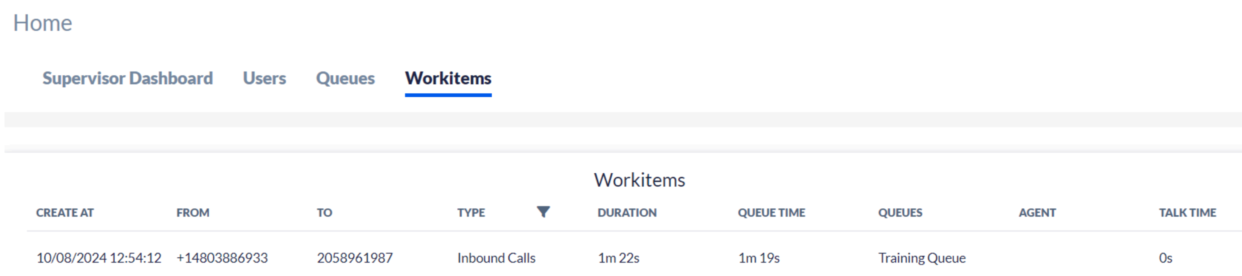
NAME	TOTAL	AVAILABLE ...	WORKING ...	BUSY AGENTS	NO ANSWER ...	IN QUEUE	ANSWERED	ABANDONED	TOTAL TRANSFE...	CMQT
KS Queue	0	0	0	0	0	0	0	0	0	0s
Sales Queue	0	0	0	2	0	0	0	0	0	0s
Service Queue	0	0	0	2	0	0	0	0	0	0s
Training Queue	1	0	0	2	0	1	0	0	0	1m 36s

XBERT TIP: You can add/remove columns by right clicking the header, and can reorder columns by clicking and dragging. For more information, refer to the Customize Column Headers section above.

Key Queue Metrics

- **Name:** The name of the queue(s)
- **Total:** The total number of workitems/calls handled by the queue. A workitem/call can be counted twice if it is transferred back into the queue.
- **Available Agents:** Number of agents that are currently in the available status
- **Working Agents:** Number of agents in the working status (engaged with a workitem/call)
- **Busy Agents:** Number of agents that are currently in the busy status
- **No Answer Agent:** Number of agents that are currently in the no answer status
- **In Queue:** Number of workitems/call currently sitting and waiting in queue
- **Answered:** Number of answered workitems/call
- **Abandoned:** Number of abandoned workitems/calls. For example, if somebody hangs up while waiting in a call queue, that would be an abandoned call to the queue.
- **Total Transferred:** Number of transferred workitems/calls.
- **CMQT (Current Maximum Queue Time):** Longest wait time the CURRENT customer in queue has been waiting

Workitems



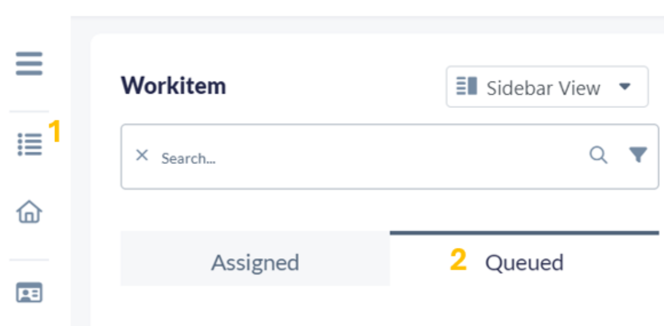
CREATE AT	FROM	TO	TYPE	DURATION	QUEUE TIME	QUEUES	AGENT	TALK TIME
10/08/2024 12:54:12	+14803886933	2058961987	Inbound Calls	1m 22s	1m 19s	Training Queue		0s

Key Workitem Metrics

- **Create At:** The date and time the workitem/call was created.
- **From:** Phone number of the caller calling into the queue.
- **To:** Phone number that the caller dialed to enter the queue.
- **Type:** Specific type of workitem (will usually be inbound/outbound calls, but systems integrated to include items such as SMS or Email will be labeled as such.)
- **Duration:** Amount of time that the workitem has existed.
- **Queue Time:** Amount of time that the call spends waiting in queue (if call is currently in queue the number updates in real time.)
- **Queues:** The queue is the workitem in (or if already answered, the queue that it came from.)
- **Agent:** If the workitem/call is actively with an agent, this is the agent who received/made the workitem/call.
- **Talk Time:** For calls, this is the amount of talk time spent on this call (so far.)

Taking a Workitem as a Supervisor

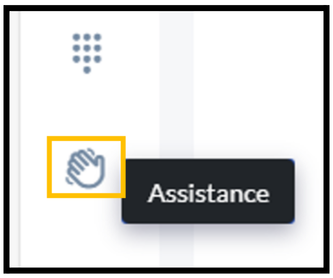
If at any time you'd like to redirect a workitem from the queue to yourself, this can be done by navigating to the **Workitems** option and selecting from the **Queued** tab

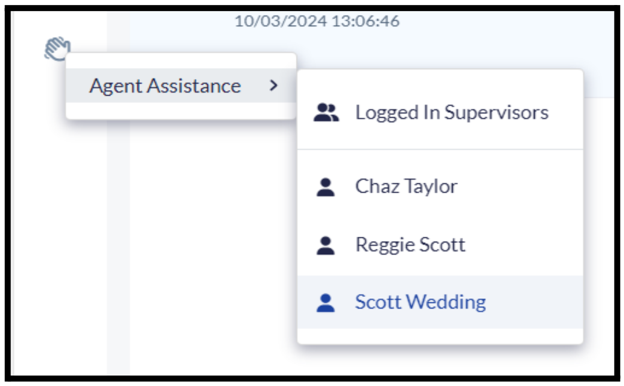


Agent Assistance

This feature allows agents to proactively reach out for help during a customer interaction. From the icon in the Options menu, the agent will choose the name of the supervisor. You'll receive a notification that looks like a Workitem.

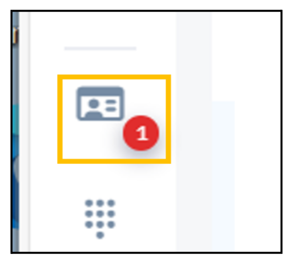
From the agents perspective:

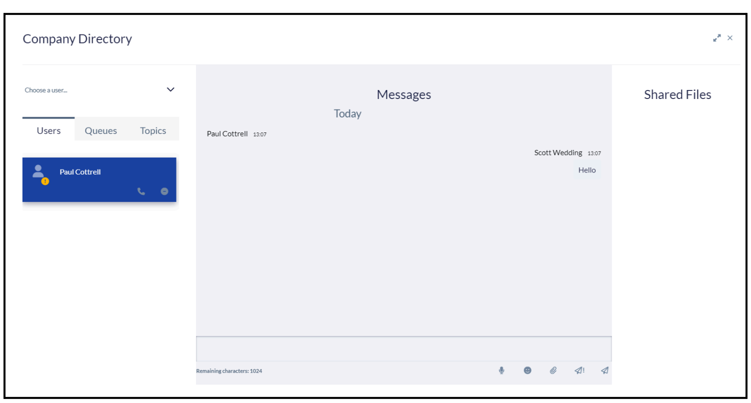




Company Directory

The Company Director is where you'll chat with the live agent. The agent can then call you directly or transfer their workitem to you.



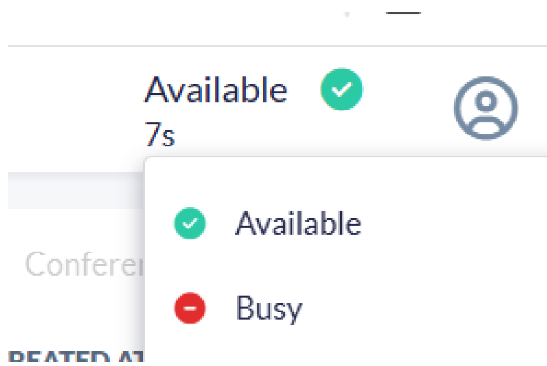


Going Unavailable

Once you've wrapped up your day, make sure to sign out. You definitely don't want customers waiting in line with no agents around to help them, so this step is really important when you're done.

Unavailable: this will be used for breaks, meetings, outbound dialing, and lunch.

1. Click on the **Available** icon top right.
2. Select **Busy**.



Signing out

Click the avatar in the top right, select **Logout of ACD.**