



Nextiva Call Center

Agent Guide

VERSION 2.5

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Product Summary

Nextiva Call Center provides Nextiva customers with borderless communication features including basic communication features (Voice, Fax, Mobile Apps, and Team Presence), in addition to advanced inbound features, such as ACD statuses, customizable Call Center routing options, and unique messaging configurations.

This document aims to cover the following features related to Call Center Agents:

- Logging In
- User Dashboard
- Call Center Agent Settings
- DNIS and Alternate Outbound ID
- Call Center Status
- Alternative Access

Product Requirements

In addition to a Business Communication Suite (Basic, Pro, or Enterprise), a Nextiva Call Center (Pro or Enterprise) upgrade is required (per User) to take advantage of features detailed in the sections below. If the features described in this User guide are not available, please reach out to an Account Executive or Nextiva Support.

Nextiva Call Center Agent features require:

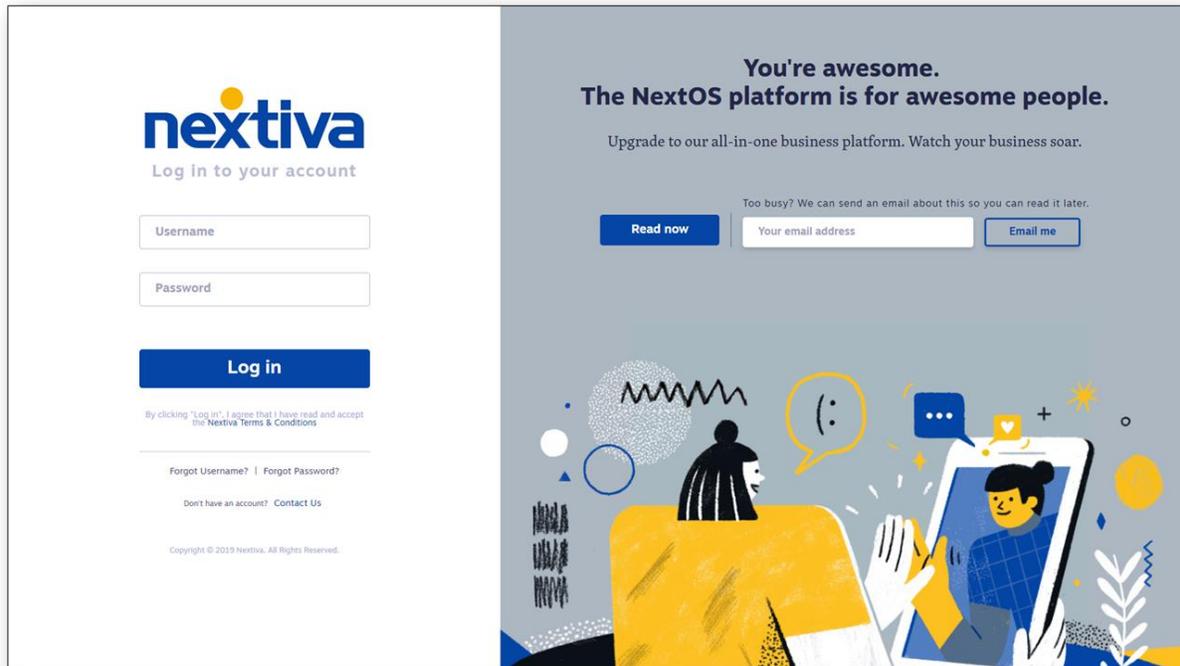
- An active Internet connection
- Access to a web browser such as Google Chrome, Internet Explorer, or Safari
- An active NextOS account
- Login details for the NextOS User Portal
- An Internet phone provisioned on the Nextiva network and/or the Nextiva App

For additional assistance relating to any device or provisioning requirements, please contact a member of our Amazing Service team by emailing support@nextiva.com to immediately open a case.

Nextiva Voice User Portal: Logging In

1. Visit www.nextiva.com, and click **Client Login** to log in to NextOS.
2. From the NextOS Home Page, select **Voice**.

NOTE: Within this portal, a User has access to their personal feature profile, as well as Call Center Agent functionality and any applicable dashboards if purchased.



Login Page Authenticate.Nextiva.com

Username and passwords are case sensitive. Users who do not know the username or password may use the “Forgot” options listed below the **Log In** button.

For additional assistance logging in, please contact a member of our Amazing Service team by emailing support@nextiva.com to immediately open a case.

Nextiva Voice User Portal: Navigating

For Users, the Nextiva Voice dashboard shows only User-specific information. Users cannot access administrative features, such as licensing, billing, or other Users' details.

Users can access User-specific extension details and the company directory from this dashboard. There is a simple Activity section, showing Inbound/Outbound call history, as well as Missed Call data.

The screenshot shows the Nextiva Voice User Portal dashboard for Jason Smith. The dashboard is divided into several sections:

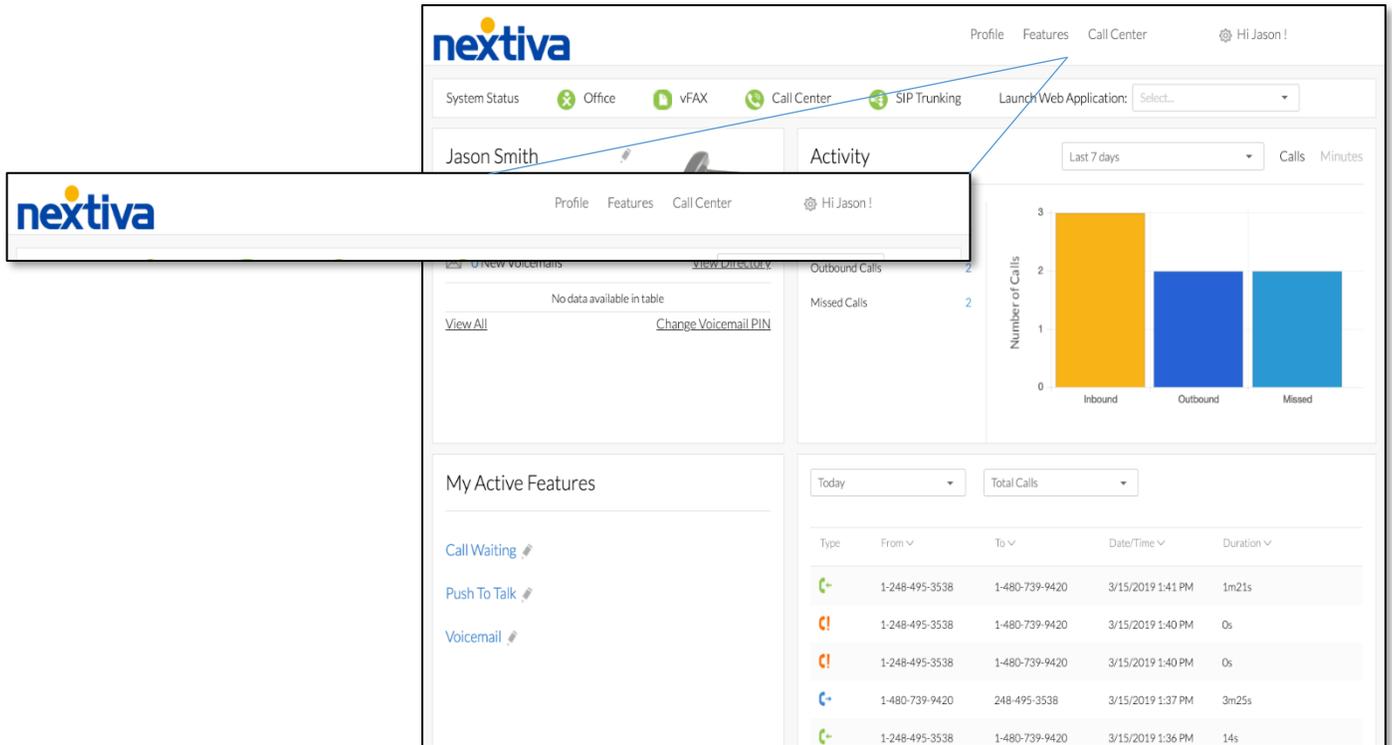
- System Status:** Includes icons for Office, vFAX, Call Center, and SIP Trunking. A "Launch Web Application" dropdown menu is set to "Select...".
- User Profile:** Displays the user's name (Jason Smith), phone number (480-739-9420), and extension (Ext. 9420). It also shows "0 New Voicemails" and a "View Directory" link. A note states "No data available in table" with links for "View All" and "Change Voicemail PIN".
- Activity:** A bar chart showing call activity for the last 7 days. The Y-axis is "Number of Calls" (0 to 3). The X-axis categories are Inbound (3 calls), Outbound (2 calls), and Missed (2 calls).
- My Active Features:** Lists "Call Waiting", "Push To Talk", and "Voicemail" with edit icons.
- Call History:** A table showing call details for "Today" and "Total Calls".

Type	From	To	Date/Time	Duration
Inbound	1-248-495-3538	1-480-739-9420	3/15/2019 1:41 PM	1m21s
Missed	1-248-495-3538	1-480-739-9420	3/15/2019 1:40 PM	0s
Missed	1-248-495-3538	1-480-739-9420	3/15/2019 1:40 PM	0s
Outbound	1-480-739-9420	248-495-3538	3/15/2019 1:37 PM	3m25s
Inbound	1-248-495-3538	1-480-739-9420	3/15/2019 1:36 PM	14s

User Dashboard

Profile details can be accessed by selecting **Profile** at the top of the dashboard. Here, Users can update or view email and password information.

User-level features, such as Call Waiting, Mobility, and Forwarding can be reached by selecting **Features** at the top of the dashboard.



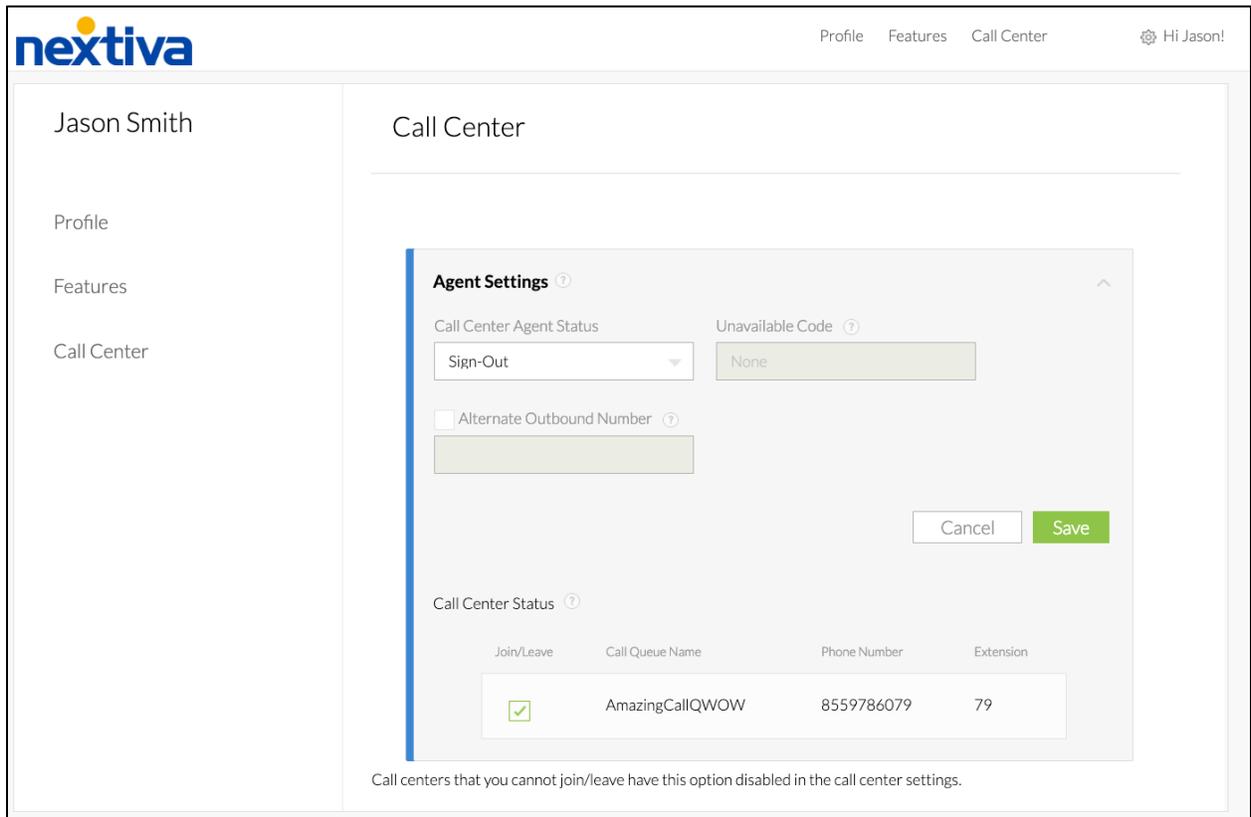
Profile ~ Features ~ Call Center

NOTE: A User will see **Call Center** at the top of the dashboard once they have been set up with a Call Center license (Pro or Enterprise).

If this option is not available, please contact an Account Executive or any member of Nextiva's Amazing Service team by emailing support@nextiva.com to immediately open a case.

Nextiva Voice User Portal: Call Center

Click **Call Center** at the top of the dashboard to access the **Call Center Agent Settings**.



Call Center Agent Settings

Here, the User can view their status within Call Center. In the figure above, notice this Agent/User is in **Status: Sign-Out**. They are unable to take calls currently.

If the Agent chooses to change the Call Center status here, also known as the ACD Status (Automatic Call Distribution), they may simply click the drop-down menu and select any option they like.

NOTE: If the User has a **Call Center Pro** license assigned, only generic Unavailable codes will be available to them. If the User has a **Call Center Enterprise** license assigned, custom Unavailable codes will be shown.

Agent Settings ?

Call Center Agent Status

- Sign-In
- Sign-Out**
- Available
- Unavailable
- Wrap-Up

Unavailable Code ?

None

Cancel Save

Call Center Status ?

Join/Leave	Call Queue Name	Phone Number	Extension
<input checked="" type="checkbox"/>	AmazingCallQWOW	8559786079	79

ACD Status: Sign-Out

Agent Settings ?

Call Center Agent Status

Unavailable

Alternate Outbound Number ?

Unavailable Code ?

- None**
- HR
- Training
- Lunch
- Restroom
- Personal Call
- Break

Cancel Save

Call Center Status ?

Join/Leave	Call Queue Name	Phone Number	Extension
<input checked="" type="checkbox"/>	AmazingCallQWOW	8559786079	79

ACD Status: Customized Unavailable Codes

For Agents wanting to perform outbound calls and control caller ID, there is an option to affect the **Alternate Outbound Number** from this screen.

NOTE: This is only available with a Call Center Enterprise license. A specific feature called DNIS must be set up by the Administrator (or Nextiva Support) prior to use.

XBert tip:
To use alternate outbound numbers, you must go to the DNIS (Dialed Number Identification Service) section of an enterprise call center. Edit a DNIS you would like to dial outbound as and enable the option to: allow outgoing call center call.

Alternate Outbound Number ?

Cancel Save

Call Center Status ?

Join/Leave	Call Queue Name	Phone Number	Extension
<input checked="" type="checkbox"/>	AmazingCallQWOW	8559786079	79

Alternate Outbound Numbers

Below the **Save** button, Users can opt to change the Call Center ACD state for any queues they are joined to, when applicable. Administrators have the option to block Agents from Joining/Leaving Call Centers if desired. However, if set up with appropriate permissions, Agents are able to remove themselves from any joined Call Center queues. Users can also view queue details, such as queue name, any assigned DIDs, and/or extensions numbers.

For additional assistance relating to Call Center features, please contact a member of the Amazing Service team by emailing support@nextiva.com to immediately open a case.