Nextiva Unity Agent

VERSION 1.5
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Nextiva Unity Agent

Nextiva Unity Agent is a powerful application designed for high call volume environments. It allows Agents to join or leave Call Center queues, change their ACD state, view personal and overall Call Center statistics, and more.

Nextiva Unity Agent Interface

A. **ACD State Buttons**: Users update their availability in the Call Center queue (Unavailable, Available, and Wrap-up).
   
   **NOTE**: This feature requires a Nextiva Call Center license, and the User must be assigned to a queue.

B. **Call Control Buttons**: Provide quick access to common phone features such as Dial, Transfer, Hold, Conference, Voicemail, Recording, Reports, Settings, etc.
   
   **NOTE**: Only features assigned to the User will be displayed. For example, if Call Recording is not assigned to the User, the option will not be displayed.

C. **Personal Wallboard**: View performance metrics for all Call Center(s) assigned to the User. Metrics are broken down by My Statistics, which shows the User’s individual performance metrics and Overall Queue Statistics, which detail the current metrics across all call centers.

   **NOTE**: Statistics shown in Personal Wallboard reset every 24 hours at midnight.

D. **Active Call Window**: Provides a list of all active calls and the current status (Ringing, Active, or On-Hold), including the total duration of the call.

E. **Contacts**: Display up to 50 Users, including their phone number/extension, current status, and ACD state.
F. **Call Logs:** View all **Missed calls, Received calls,** and **Dialed calls.**

G. **Voicemail:** Listen and manage voicemail. Right-click any voice message to **Play, Save, Delete, Call,** or **Copy number.**

**Changing ACD State**

Users can change their availability in an assigned Call Center by selecting one of the ACD state buttons at the top of the window.

![ACD State Buttons](image)

The default Agent Availability Codes include:

- **Available:** Available to take inbound calls from the assigned caller center queue(s).
- **Unavailable:** Unavailable to take inbound calls from the assigned Call Center queue(s), including the unavailable reason code if applicable (e.g. break, restroom, etc.).
- **Wrap-Up:** Agent is in a Wrap-up status while performing post-call work.

**Joining and Leaving Call Center Queues**

Users can join or leave Call Center queues either from the **Personal Wallboard** or the **Tools** menu.

**Joining Queues:**

Right-click the **Call Center** listed on the personal wallboard. Select **Join Queue.**
Join Queue from the Personal Wallboard

Users can also click **Tools > Queues > Call Center Queue > Join Queue.**

Join Queue from the Tools Menu

Leaving Queues:

Right-click the **Call Center** listed on the **Personal Wallboard**, and select **Leave Queue.**
Users can also click **Tools > Queues > Call Center Queue > Leave queue.**

**Answering an Inbound Call**

When Unity displays an incoming call, click the **Answer** button or double-click the **Active Call Window** to answer the call. The primary device will automatically answer once the call is answered in Unity.
During an active call, click the new inbound call in the **Active Call List**. Then click **Answer**. The active call will automatically be placed on hold.

**Ending an Active Call**

Click the **Release** button to end the current active call. If multiple calls are in the **Active Call List**, make sure to select the call to end before clicking **Release**.

**Making an Outbound Call**

Users can make outbound calls from the **Dial Window**, **Contacts Panel**, **Clipboard**, or simply drag-and-drop the contact into the **Active Call Window**. The User’s primary phone will ring once the call is initiated. Pick up the handset to establish the outbound call.

**Making an Outbound Call Using the Dial Window:**

Click the **Dial** button and enter the phone number in the **Number** field. Click **Enter** or **Ok** to initiate the call.
Making an Outbound Call Using the Contacts Panel:

Double-click or right-click the desired Contact. Select Call extension or Call number.

NOTE: The Call number option will only display when right-clicking an external contact.

Making an Outbound Call Using Drag-and-Drop:

Click a Contact under the Contacts panel. Drag-and-drop the contact in the Active Call Window.

The User’s primary phone will ring once the call is initiated. Pick up the handset to establish the outbound call.

Making an Outbound Call Using Clipboard:

From any Windows application, copy a phone number to the clipboard. Click the Unity pop-up notification to dial the number.

Sending an Inbound Call to Voicemail

To send an inbound call directly to voicemail, click the Voicemail button.
Transferring a Call

There are two options for transferring a call:

- A **Warm Transfer** (attended) allows Users to speak privately with the receiving party before transferring the call. A Warm Transfer also confirms the availability of the receiving party.
- A **Blind Transfer** (unattended) allows Users to send calls to an alternate extension or phone number without waiting for an answer or confirming the availability of the receiving party.

Warm Transferring

**Warm Transfer Using the Transfer Button:**

While on an active call, initiate a second call to the receiving party. Doing so will automatically place the first call on hold. When the receiving party is ready to take the transfer, click the **Transfer** button. Select **Transfer calls together**.

**Warm Transfer Using Drag-and-Drop:**

Drag-and-drop an active call on top of a contact under the **Contacts** tab. Select **Warm transfer call to extension**. Click the **Transfer** button.

NOTE: By default, a Blind Transfer is performed automatically when dragging-and-dropping an active call on top of another call, Call Center queue, or contact. However, Unity can be configured in the settings to display a menu when dropping a call onto a contact. If menu options appear when dropping the call onto a contact, select **Warm transfer call to extension**, and then click the **Transfer** button.

**Warm Transfer Using Right-Click:**

Right-click the contact under the **Contacts** tab, select **Warm transfer call to extension**, then click the **Transfer** button.
Blind Transferring

Blind Transfer Using the Transfer Button:

While on an active call, click the Transfer button, enter the phone number or extension in the Transfer window, then click OK.

Blind Transfer Using Drag-and-Drop:

Drag-and-drop an active call on top of another call in the Active Call Window, a contact under the Contacts tab, or a Call Center queue to perform a Blind transfer.

NOTE: By default, a Blind transfer is performed automatically when dragging-and-dropping an active call on top of another call, Call Center queue, or contact. However, Unity can be configured to display a menu when dropping a call onto a contact. If menu options appear when dropping the call onto a contact, select Blind transfer call to extension.
Blind Transfer Using Right-Click:

Right-click the contact under the Contacts tab. Select Blind transfer call to extension.

![Blind Transfer Using Right-Click](image)

Notes on Previously Transferred Calls

During an incoming call, Unity automatically displays a note in the Active Call Window under the Notes column if the call was previously transferred to another User.

![Incoming Call Notes](image)

Placing a Call on Hold

To place an active call on hold, press the Hold button.

**NOTE:** If there are multiple calls in the active call window, select the desired call before pressing Hold.
Retrieving a Held Call

To retrieve a held call, press the Retrieve button or double-click the call to retrieve it. **NOTE:** If there are multiple calls in the active call window, select the desired call before pressing Retrieve.

Call Parking

Users can park calls on another User’s extension and have the call redirected back to the original User who parked the call if the call is not retrieved. The call stays in the Active Call Window with a “Parked” status, as shown below, until the call is retrieved.

![Call Parked on Extension](image)

**To Park a Call on Extension:**

1. Select the call in the Active Call Window (if multiple calls are present).
2. Right-click the User in the Contacts list, and select Park call on extension.

**To Retrieve Parked Calls:**

Once a call has been parked on a User’s extension, a pop-up window appears. To retrieve the parked call, Users can click the Pickup Call button or the pop-up window. If the call is not retrieved, it redirects back to the original User who parked the call.

![Pickup Call Button](image)

![Call Pop-Up](image)
Configuring Call Park Retrieval:

1. Navigate to Settings > Call Control > Call Park Retrieve.
2. Click Allow me to retrieve parked calls.
3. Select to be notified via Nextiva Unity toast notification or Windows balloon.
4. Click OK.

Escalating a Call to a Supervisor

Users can quickly escalate calls to a Supervisor queue by right-clicking the active call under the Active Call Window or the Call Center queue under the personal wallboard. Unity allows standard and emergency call escalations, and both types of escalations can only be performed on Call Center calls.

- **Standard Escalation:** Standard escalations allow the User to speak with the Supervisor without conferencing in the remote party, similar to a Warm Transfer. Calls can be escalated to a specific Supervisor or to the first Supervisor who is available. The Agent’s Unity client will automatically place the call on hold, then dial the extension of the Supervisor as an escalated call. At any time, the User can release the escalated call, transfer, or conference both calls together if required.

- **Emergency Escalation:** Emergency escalation allows the User to immediately conference in a Supervisor with the remote party. When performing an Emergency Escalation, Unity will place any active calls on hold, then dial the selected Supervisor or the first Supervisor who is available.

Escalating via Active Call Window

From the Active Call Window, right-click the active call > Supervisors > Supervisor > Call Escalate (Standard Escalation), or Instant conference/emergency escalate (Emergency Escalation).
Users can also select **Escalate to first supervisor** (Standard Escalation) or **Instant conference/emergency escalate to first supervisor** (Emergency Escalation) to escalate the call to the first available supervisor.

**Escalating via Personal Wallboard**

From the personal wallboard, right-click the **Call Center queue > Supervisors > Supervisor > Call Escalate** (Standard Escalation), or **Instant conference/emergency escalate** (Emergency Escalation).

Starting a Conference Call

1. While on an active call, click the **Dial** button. Enter the phone number of the third party.

   **NOTE:** Users can also double-click on any contact under the **Contacts** tab or call listed under the **Call Logs** tab to join the conference call.

2. Once the third party answers the call, click the **Conference** button.
Call Recording

Users may be able to manage Call Recordings, depending on the account configuration and Agent permissions. If this service is assigned to the User, the **Call Recording** button will be displayed under the **Call Control** buttons.

Changing Call Recording Options

Right-click the **Recording** button to select one of the following options:

- **Always**: All calls are automatically recorded from the beginning of the call. There is no option to pause or stop recording.
- **On-Demand**: Calls are not automatically recorded, but recording can be started at any time during an active call, and the entire call will be recorded from the beginning.
- **Never**: Calls are never recorded, and the feature is disabled.
- **Always with Pause/Resume**: All calls are automatically recorded from the beginning of the call, but recording can be paused and resumed.
- **On-Demand with User Initiated Start**: Calls are not automatically recorded from the beginning of the call, but recording can be started and paused at any time.

Controlling Call Recording

Users can start, stop, pause, and resume Call Recording depending on the Call Recording option selected by clicking the **Recording** button. The **Active Call List** will also indicate the recording status of the call.
Sending Instant Messages

Send and receive instant messages between any Nextiva Unity User (Reception, Agent, or Supervisor). Users can send messages from the Personal Wallboard, Contacts tab, Agent Activity tab, and the Tools menu. Instant messages can only be sent to other Nextiva Unity Users. If the contact is not a Nextiva Unity User, the instant message option will not be displayed. Messages sent to offline Users will be delivered once the recipient opens Unity.

Sending Instant Messages Using the Personal Wallboard:

1. Right-click on the Call Center under the Personal Wallboard.
2. Select Agents > Agent > Instant message.
Sending Instant Messages Using the Contacts Tab:

1. Click the **Contacts** tab.
2. Right-click on the **Contact** and select **Instant message**.

![Sending an Instant Message via Contacts Tab](image)

Sending Instant Messages Using the Tools Menu:

1. Click **Tools** > **Call Centers** > **Call Center Queue** > **Agents** > **Agent** > **Instant Message**.

![Sending an Instant Message via Tools Menu](image)

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