

# **Nextiva Unity Reception**

VERSION 1.3

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# Nextiva Unity Reception

Nextiva Unity Reception is a powerful application designed for high call volume environments and Users who need to manage a larger number of concurrent calls or require visibility of all Users in the business.

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A			My Statis					01	verall Queue Statis	tics		
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Billy's Computer Warehouse	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00
Joe's Printer Warehouse	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00
Ralphs Router Warehouse	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00
	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00
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Nextiva Unity Reception 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.

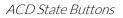
- C. **Personal Wallboard:** View performance metrics for all Call Center(s) assigned to the User. Metrics are broken down by **My Statistics**, which shows the User's individual performance metrics, and **Overall Queue Statistics**, which detail the current metrics across all call centers.
- D. Active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

File Messaging Tools Help	Dial Transfer Hold		ecording Settings
			My Statistics
Name	Total Calls	Answered Calls	Missed Calls
Billy's Computer Warehouse	0	0	0
Joe's Printer Warehouse	0	0	0
Ralphs Router Warehouse	0	0	0
	0	0	0



The default 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.



File Messaging Tools Hel					
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Unavailable Available Wrap-up Release	e Dial Transfer Hold	Conference Voicemail F	Recording Settinas		
			My Statistics		
Name	Total Calls	Answered Calls	Missed Calls		
Billy's Computer Warehouter	Call queue	<u> </u>	0		
Joe's Printer Warehouse	Call queue		0		
Ralphs Router Warehod	Join Queue		0		
C	Refresh statistics		0		
From ×	Remove from personal	wallboard	То		
	Show gridlines				

Join Queue from the Personal Wallboard

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

File Messaging Tools Heln Que Unavallable Wrap-up Release	ngs Dako Dial Tr Joe's	s Computer Warehouse ta's Computer Accesso Printer Warehouse ns Router Warehouse	vries	queue
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time
Billy's Computer Warehouse	0	0	0	00:00:00
Joe's Printer Warehouse	0	0	0	00:00:00
Ralphs Router Warehouse	0	0	0	00:00:00
	0	0	0	00:00:00

Join Queue from the Tools Menu

#### Leaving Queues:

Right-click the Call Center listed on the Personal Wallboard, and select Leave Queue.



File Messagin	Wrap-up Release	Dial Transfer Hold			ecording Settings
					My Statistics
Name		Total Calls	Answe	ered Calls	Missed Calls
Billy's Computer Source Computer Source S	iter Warehouse	0		0	0
Joe's Printer '	Marabauaa	0		0	0
Ralphs Rout	Call queue			0	0
	Leave Queue			0	0
	C Refresh statist	tics			
From				T	Го
	Supervisors		•		
	× Remove from	personal wallboard			
	<ul> <li>Show gridline</li> </ul>	S			

Leave Queue from the Personal Wallboard

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

File Messaging Tool Que			Computer Warehouse a's Computer Accesso		
Unavailable Available Wrap-up Release	Dial Tr	Joe's F	Printer Warehouse	🕨 📞 Call	queue
		Ralph	s Router Warehouse	eav	/e queue
Name	Tota	l Calls	Answered Calls	Misseu Carlo	ervisors
Billy's Computer Warehouse		0	0	0	00:00:00
O Joe's Printer Warehouse		0	0	0	00:00:00
Ralphs Router Warehouse		0	0	0	00:00:00
		0	0	0	00:00:00

Leave Queue from the Tools Menu

### Answering an Inbound Call

When Unity displays an incoming call, click the **Answer** <sup>(2)</sup> 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** <sup>(2)</sup> 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.

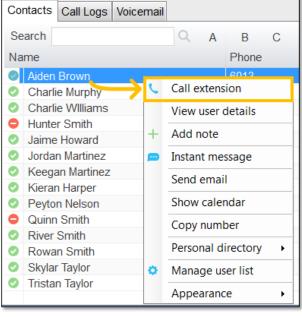
File Messaging Tools Help				00						D	extiv	
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Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Billy's Computer Warehouse	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00
Joe's Printer Warehouse	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00
Ralphs Router Warehouse	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00
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Search Name Aiden Brown Charlie Murphy Charlie Williams Hunter Smith Jaime Howard	Pho 6013 4806 1000 2064 6003	ne 3 5817724 0 1863791 3	E F	ACD S	tate	K L M	Status		R S		A ANNO AND	
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Search Name Aiden Brown Charlie Murphy Charlie Williams Hunter Smith Jaime Howard	Pho 6013 4806 1000 2066 6003 4804 3609	ne 3 5817724 0 1863791 3	E F	ACD S	tate	K L M	Status		RS		A ANNO AND	

Dial Window



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.

Call Extension

#### Making an Outbound Call Using Drag-and-Drop:

Click a **Contact** under the **Contacts** panel. 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 Clipboard:

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

### Sending an Inbound Call to Voicemail

To send an inbound call directly to voicemail, click the **Voicemail**  $\stackrel{69}{=}$  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** <sup>(2)</sup> 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-anddropping 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.



Contacts Call Lo	ogs Voicemail							
Search	(	A A	В	С	D	Е	F	G
Name			Phone					
Adden Brown     Charlie [     Charlie ]     Charlie [     Charlie ]     Jaime H     Jordan I     Keegan     Kieran H     Peyton I     Quinn S +     River Sr     Rowan 3     Skylar T     Tristan 1	Call extension Blind transfer cal Warm transfer ca Transfer to voicer Park call on exter View user details Add note Instant message Send email Show calendar Copy number Personal director Manage user list Appearance	II to exte mail nsion		4 1 1 3 6 2 8 8				

Warm Transfer to Contact Using Right-Click

### **Blind Transferring**

#### Blind Transfer Using the Transfer Button:

While on an active call, click the **Transfer** <sup>(2)</sup> 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-anddropping 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 **Blind transfer call to extension**.



#### Blind Transfer Using Right-Click:

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

Search	Q	A E	0	D C	E	F	G
Name		Pho	one				
Aiden Brown	1	601	3	_			
O Charlie I				4			
Charles	Blind transfer call to e	xtension					
Hunter S	Warm transfer call to	extensio	n	1			
Jaime H	Transfer to voicemail			1			
<ul> <li>Keegan</li> </ul>	Park call on extension	3					
Kieran H				6			
Peyton I	View user details			2			
Quinn S +	Add note						
<ul> <li>River Sr</li> <li>Rowan</li> </ul>	Instant message						
Skylar T	Send email			-			
Tristan 1	Show calendar			8			
_	Copy number						_
	Personal directory		,				
0	Manage user list	-					
	Appearance		,	-			

Blind Transfer Using Right-Click

### 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.

	From	To	Duration	Status	Notes
0	Barry Simpson	Chris Tutt	00:18	Call parked for Andrew Smith	Previously transferred to Andrew Smith
_					

Incoming Call Notes



# **Call Parking**

Users can park calls on another Users 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.

	From	То	Duration	Status	Notes
0	Barry Simpson	Chris Tutt	00:18	Call parked for Andrew Smith	Previously transferred to Andrew Smith

Call Parked on Extension

#### 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

				×
Call parke (Salesford Click here	ce Co	ntact)	rge Orwell ne call	
へ 中) 9重	a a	ENG	10:42 19/09/2018	喝

Call Pop-Up

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.



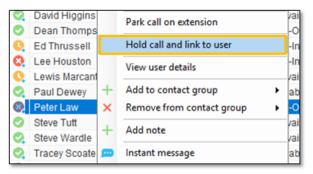
# Hold and Links Calls

This feature allows the receptionist to link a call in the Active Call Window with an internal User in the Contacts list. The receptionist can see whom the caller is holding for and their current status without having to check manually. This is helpful for Users who manage a large number of concurrent calls with several callers on hold simultaneously. When the linked User goes back available, Unity automatically transfers the call or prompts to transfer the call.

#### To Hold and Link a Call to a User:

- 1. Select the call in the Active Call Window (if multiple calls are present).
- 2. Right-click on the User in the **Contacts** list.
- 3. Select Hold call and link to user.

**NOTE:** This feature is only available when the User is currently on the phone.



Hold and Link to User

The call is placed on hold, and the receptionist can take other calls. The **Notes** field turns red to indicate the call is waiting on the User.

	From	То	Duration	Status	Notes
θ	Natalie Maines (Salesforce Contact)	Jenna Wimshurst	03:28 (01:26)	On hold	Waiting for Peter Law

Red Notes Field - Call Waiting on User

When the User becomes available, the Notes field changes to green alerting the receptionist that the monitored User is available to take the call.

From	То	Duration	Status	Notes
Natalie Maines (Salesforce Contact)	Jenna Wimshurst	08:06 (06:05)	On hold	Waiting for Peter Law

Green Notes Field - User Available to Take Call



To transfer the call, either drag-and-drop it on the User or right-click and select **Transfer call to extension**. The call can also be unlinked from the User by right-clicking and selecting **Remove link to user**.

# 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).

From		То		Duration		Status	
+14804861921	+	Add number to personal directory	7	00:45		Active - Not recording	
		Escalate to first supervisor Instant conference/emergency escalate to first supervisor					
		Supervisors +		Charlie WIlliams		Call/escalate	
		Assign disposition code				Instant conference/emergency escalate	
		Reset column widths			e	Blind transfer call to extension	
ntacts Call Logs Vo	~	Show gridlines			ø	Instant message	ailable in offic

Escalating via Active Call Window

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).

				My Statistics					Ove	erall Queue Sta	tistics	
		Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	
Billy's Computer Wareh		0	0	0	00:00:00	00:00	0	0	0	0	00:00	
Dee's Printer Wa Call queue					:01:04	01:09	1	1	0	0	00:00	
					:00:00	00:00	0	0	0	0	00:00	
	Transfer G	all to queue			:01:04	00:23	1	1	0	0	00:00	
	Leave Que	eue										
c.	Refresh st	atistics				Duration				Status		
~							00:19	Active - Not recording				
Escalate to first supervisor												
Instant conference/emergency escalate to first supervisor Supervisors Remove from personal wallboard Show gridlines												
					► Cha	arlie WIlliams 🕠	Call/es	Call/escalate				
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							🕲 Blind tr	ansfer call to ex				
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	ر د ×	<ul> <li>Call queue Transfer c</li> <li>Leave Que</li> <li>Refresh st Escalate t Instant co</li> <li>Superviso</li> <li>× Remove fi</li> </ul>	Warehouse     0       Call queue     Transfer call to queue       Leave Queue     Call queue       Escalate to first supervisoon     Instant conference/emerged       Supervisors     Remove from personal ways	Calls       Warehouse     0     0       Call queue     Transfer call to queue       Transfer call to queue       Leave Queue       Refresh statistics       Escalate to first supervisor       Instant conference/emergency escalate to       Supervisors       Supervisors       Refrow from personal wallboard	Total Calls     Answered Calls     Missed Calls       Warehouse     0     0       Call queue     0     0       Transfer call to queue	Total Calls     Answered Calls     Missed Calls     Total Talk Time       Warehouse     0     0     000000       Call queue     00000     000000       Transfer call to queue     0104     00000       Leave Queue     0104     0104       Refresh statistics     Escalate to first supervisor     0104       Supervisors      Char       X     Remove from personal wallboard	Total Calls         Answered Calls         Missed Calls         Total Talk Time         Average Talk Time           Warehouse         0         0         0         00:00:00         00:00           Call queue         01:04         01:09         00:00         00:00         00:00           Transfer call to queue         01:04         00:023         00:023         00:023         00:023           Leave Queue         Escalate to first supervisor Instant conference/emergency escalate to first supervisor         Varie Williams         Charlie Williams           X         Remove from personal wallboard	Total Calls     Answered Calls     Missed Calls     Total Talk Time     Average Talk Time     Total Calls       Warehouse     0     0     00000     00000     0       Call queue Transfer call to queue     01.04     01.09     1       Leave Queue     01.04     00.23     1       Escalate to first supervisor Instant conference/emergency escalate to first supervisor     00.19     01.19       X     Remove from personal wallboard     Call/ess     Instant       Y     Show gridlines     Y     Charlie WIlliams     Call/ess	Total Calls     Answered Calls     Missed Calls     Total Talk Time     Average Talk Time       Warehouse     0     0     0     00.00.00     00     0       Call queue     0     0     00.00.00     00     0     0       Transfer call to queue     01.04     01.09     1     1       Leave Queue     00.104     00.23     1     1       Escalate to first supervisor Instant conference/emergency escalate to first supervisor     00:19     00:19       Supervisors     Charlie WIlliams     Call/escalate Instant conference/emergency	Total Calls     Answered Calls     Missed Calls     Total Talk Time     Average Talk Time     Total Calls     Calls     Total Missed Calls       Warehouse     0     0     0     00:00:00     0     0     0       Call queue     00:00:00     00:00     0     0     0       Transfer call to queue     00:00     00:00     0     0     0       Leave Queue     00:104     00:23     1     1     0       Escalate to first supervisor Instant conference/emergency escalate to first supervisor     Ou:19     Call/escalate       Show gridlines     Charlie Williams     Call/escalate	Total Calls     Answered Calls     Missed Calls     Total Talk Time     Average Talk Time     Total Calls     Calls Answered     Total Missed Calls     Calls Queue       Warehouse     0     0     0     00:00:00     00     0     0     0       Call queue Transfer call to queue     01:04     01:09     1     0     0       Leave Queue     01:04     00:23     1     1     0     0       Refresh statistics     Duration     Status       Supervisor     0:19     Active - Not record       Instant conference/emergency escalate to first supervisor     0.19     Call/escalate       Show gridlines     Show gridlines     Utantant conference/emergency escalate     Utantant	

Escalating via Personal Wallboard

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.

### Placing a Call on Hold

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

**NOTE:** If there are multiple calls in the active call window, select the desired call prior to 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**.



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## Starting a Conference Call

1. While on an active call, click the **Dial** <sup>(1)</sup> 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** <sup>40</sup> 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.



Available Wrap-up Release	Dial Transfer	Hold Conterence	Voicemail Rev	Pause recordi Stop recordin	-						nextiv		
My Statistics						Overall Queue Statistics							
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	
Billy's Computer Warehouse	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00	
O Joe's Printer Warehouse	3	3	0	00:03:38	01:16	3	3	0	0	00:00	00:03	01:12	
Ralphs Router Warehouse	0	0	0	00:00:00	00:00	0	0	0	0	00:00	00:00	00:00	
	3	3	0	00:03:38	00:25	3	3	0	0	00:00	00:01	00:24	
From		То				Duration			Status				
+14804861921		Joe's	Printer Warehou	se		00:30			Active - Recordin	q			

Call Recording Status

For additional assistance, please contact a member of our Amazing Service team by emailing <a href="mailto:support@nextiva.com">support@nextiva.com</a> to immediately open a case.



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