Nextiva Unity Supervisor

VERSION 1.3
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Nextiva Unity Supervisor

Nextiva Unity Supervisor is a powerful reporting and management application that provides Supervisors relevant, real-time performance information on Agents and queues. Key performance indicators, such as the total number of calls in queue, wait time, and Agents available, are all displayed. Supervisors can easily view and customize Call Center statistics shown, change Agent’s availability, silent monitor, and set up threshold alerts all from Nextiva Unity Supervisor.

**Nextiva Unity Supervisor Interface**

A. **ACD State Buttons**: Used for updating the Supervisor’s availability in the Call Center queue (Unavailable, Available, and Wrap-up).

   **NOTE**: This feature requires a Nextiva Call Center license, and the Supervisor 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 Supervisor are displayed. For example, if Call Recording is not assigned to the Supervisor, the option will not be displayed.

C. **Personal Wallboard**: View performance metrics for the Call Center(s) the Supervisor is assigned to. 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 their current status (Ringing, Active, or On-Hold), including the total duration of each call.
E. **Contacts:** Displays 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.**

H. **Agent Activity:** View and manage all Agents, or those for a specific queue. Make Agents “Available,” or move them in and out of queues as required.

## Changing Agent ACD State

Supervisors can change Agent’s availability for the Call Center either from the **Personal Wallboard,** **Tools Menu,** or the **Agent Activity** tab. Below are the all the Agent availability options to select from:

- **Join Queue:** Assign the selected Agent to the selected queue.
- **Leave Queue:** Unassign the selected Agent from the selected queue.
- **Sign-In:** Update the selected Agent’s ACD state to Sign-In.
- **Available:** Update the selected Agent’s ACD state to Available.
- **Unavailable:** Update the selected Agent’s ACD state to Unavailable, including the unavailable reason code if applicable (e.g., break, restroom, etc.).
- **Wrap-Up:** Update the selected Agent’s current ACD state to Wrap-Up.
- **Sign-Out:** Sign the selected Agent out of all queues.

### From the Personal Wallboard:

1. Right-click on the **Call Center** under the Personal Wallboard.
2. Select **Agents > Agent > Agent availability.**
From the Agent Activity Tab:

1. Click the Agent Activity tab, then select a Call Center from the Name drop-down menu.
2. Right-click on the Agent and select the Agent availability.
From the Tools Menu:

1. Click **Tools > Call Centers > Call Center > Agents > Agent > Agent availability.**

   ![Agent Status - Tools Menu](image)

**Silent Monitoring**

Supervisors can silently monitor current calls, the next call, or all calls taken by a specific Agent.

**Silent Monitor From the Personal Wallboard:**

1. Right-click on the **Call Center** under the Personal Wallboard.
2. Select **Agents > Agent > Silent Monitor > Current call, Next call only, or All calls.**
Silent Monitor From the Agent Activity Tab:

1. Click the **Agent Activity** tab, then select a Call Center from the **Name** drop-down menu.
2. Right-click on the **Agent** and select **Silent Monitor > Current call, Next call only, or All calls**.
Silent Monitor From the Tools Menu:

1. Click **Tools > Call Centers > Call Center > Agents > Agent > Silent Monitor > Current call, Next call only, or All calls.**
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 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:

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

1. Double-click or right-click the desired Contact.
2. 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:

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

Making an Outbound Call Using Clipboard:

1. From any Windows application, copy a phone number to the clipboard.
2. 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:

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

Warm Transfer Using Right-Click:

1. Right-click the contact under the Contacts tab.
2. Select Warm transfer call to extension.
3. Click the Transfer button.
Blind Transferring

Blind Transfer Using the Transfer Button:

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

Blind Transfer Using Drag-and-Drop:

1. 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:

1. Right-click the contact under the Contacts tab, or the Call Center Queue.
2. Select Blind transfer call to extension.
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 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.

![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.

**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**.

![Pickup Call Button](image1)

![Call Pop-Up](image2)
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 second party answers the call, click the Conference button.

Conference Bridge Integration

Unity provides easy access to the Nextiva Conference Bridge. Users can right-click the Conference button to view or copy the Conference Bridge details or call the bridge as a moderator.

*Note:* This feature only displays if a Conference Bridge is assigned to the User’s Nextiva Voice account.

Call Recording

Users may be able to manage Call Recordings, depending on the account configuration and User 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 Instant Messages Using the Tools Menu:

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

Sending Instant Messages Using the Agent Activity Tab (Supervisor Only):

1. Click the **Agent Activity** tab.
2. Right-click on the **Agent** and select **Instant Message.**
Abandoned Calls

A Supervisor can assign abandoned calls to an Agent for a callback. Unity automatically changes the outbound number to match the phone number the caller dialed into.

1. Click the Abandoned Calls tab to view all abandoned calls.

2. Right-click on any abandoned call, click Assign for callback, then select an Agent.

Supervisors can also right-click on any abandoned call to Mark as processed and remove from the abandoned call list.
Customizing Statistics

Customize all statistics displayed under the **Personal Wallboard** and the **Agent Activity** tab. For example, a Supervisor may only want the total number of Calls In Queue, the Average Wait Time, Average Talk Time, and Total Calls displayed under the **Overall Queue Statistics**, and only the Total Talk Time, Total Staffed Time, and current ACD State displayed under the **Agent Activity** tab.

**To Add a New Statistic:**

1. Go to **Tools > Settings > Statistics > Columns**.
2. Select **Agent Columns** (My Statistics), **Call Center Columns** (Overall Queue Statistics), or **Agent Activity**.
3. Click the **Plus (+)** icon at the bottom right corner of the window.
4. Select the new statistic from the **Statistic to display** drop-down menu.
5. Click **OK** to save changes.

**NOTE:** Use the up and down arrows at the bottom right corner of the window to adjust the order in which the statistics are displayed.
To Remove a Statistic:

1. Go to **Tools > Settings > Statistics > Columns**.
2. Select **Agent Columns** (My Statistics), **Call Center Columns** (Overall Queue Statistics), or **Agent Activity**.
3. Click the **Minus (-)** icon at the bottom right corner of the window.
4. Click **OK** to save changes.

**NOTE:** Use the up and down arrows at the bottom right corner of the window to adjust the order in which the statistics are displayed.
Configuring Thresholds

Thresholds allow Supervisors to configure performance triggers against various parameters so they can quickly identify abnormal behaviour and can take corrective action. Supervisors can set values to display different colors under the Personal Wallboard and Agent Activity tab and receive pop-up alerts when those values are met. Supervisors can specify different values and alerts for all statistics displayed. For example, a Supervisor may want the Number of Calls in Queue column to display green anytime there is more than 1 call in queue, yellow when there are more than 5 but less than 10 calls in queue, and red when there are 10 or more calls in queue, as well as a pop-up alert.

1. Go to Tools > Services > Statistics > Columns.
2. Select Agent Columns (My Statistics), Call Center Columns (Overall Queue Statistics), or Agent Activity.
3. Double-click the Statistic (e.g., Calls In Queue), then click the Set threshold alert values checkbox.
4. Double-click All or a specific Call Center to populate the threshold value.

**NOTE:** Different thresholds can be set for all queue parameters for different Call Centers, or all Call Centers can have the same threshold.
5. Click the **Set threshold alert values** checkbox.
6. Enter the threshold values. Click the **Show threshold alert** checkbox to receive pop-up alerts when the specific threshold is met.
7. Click the **OK** button when finished. The threshold will be set as shown below.

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