

# **NEXTIVA UNITY** Call Center Help Guide

nextiva.com/support

## Nextiva Unity Call Center Help

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#### 1. Naming Conventions for this Help

- a. Call Center instances are also referred to as Queues in this guide.
- b. ACD calls mean incoming calls into the call center/queue
- c. NCC means the Nextiva Call Center platform

## 2. System Requirements

#### 2.1 Windows PC Requirements

- Nextiva Unity will require approx. 100MB of hard drive space on the local machine
- By default, the install directory is C:\Program Files\Nextiva Unity Client
- Minimum computer spec: CPU: single core 3Ghz. Ram: 4MB. Video Card: 256MB onboard RAM
- Nextiva Unity can be rolled out as an MSI file, which supports Active Directory group profiles
- Nextiva Unity is only supported on Windows XP [SP3], Windows 7 [32 and 64-bit versions] and Windows8 [32 and 64-bit versions]. There are no special permissions required to install Nextiva Unity on Win7 and Win8

#### 2.2 Selecting Unity Start-up Version

All Nextiva Unity products are included within the same install file. Choose the Nextiva Unity version in Settings [button] > Settings [tab] > Start-up, and then choose the option from drop down list as shown below.

Unity Settings       Configure Unity to automatically start when the operating system does. You can also select which Unity application to load on startup.         Computer/Phone Integration       Outlook Integration         Outlook Integration       Auto start Unity on operating system boot         Outlook Integration       Auto start Unity on operating system boot         Unity Connect       Quick Keys         Startup       Unity Call Center Agent         Unity Call Center Agent       Unity Call Center Agent         Network       Proxy         Authentication       Authentication	Services Setting	15
	Unity Settings Appearance - Computer/Phone Integration - Dialling Rule - Outbook Integration - Outbook Integration - Call Notification - Unity Connect - Quick Keys - Startup - Update - Instant Messaging & Presence - Security - Innyage Connection - Network - Proxy - Authentication	Configure Unity to automatically start when the operating system does. You can also select which Unity application to load on startup. Auto start Unity on operating system boot Always auto start in minimized state Startup application: Unity Cal Center Agent Unity Cal Center Agent Unity Cal Center Supervisor Unity Cal Center Wallboard



## 2.3 Configuration Options

- Instant Message Log: By default, instant messages are saved to the Instant Message Log folder at C:\Program Files (x86)\Nextiva Unity Client\Instant Message Log. This can be changed in Settings to be any location, for example to a network share on a server.
- 2. **Citrix/Thin Client Support:** Nextiva Unity is supported for use in a Citrix/Terminal Services environment.
- 3. **Proxy Settings:** Nextiva Unity can be configured for use behind an HTTP proxy server in Settings [Button] > Settings [tab] > Proxy.
- 4. Language: Nextiva Unity Desktop [not available on Agent, Supervisor or Wallboard] can support any language based on Latin characters [including local variations such as US and EN English]. Nextiva must first populate the corresponding language prompts in the Nextiva Unity Portal.
- 5. Call Center Statistics Nextiva Unity will poll NCC for current statistics that are used to populate the Personal Wallboard. The polling frequency can be configured between 60 and 900 seconds [with 900 seconds being the default] in Settings [button] > Settings [tab] > Call Center > Statistics. The minimum duration that can be set is determined by what Nextiva has entered in the Nextiva Unity Portal. See 4.4 Statistics Refresh Timer
- 6. Locking Nextiva Unity Settings Nextiva Unity Settings can be locked so that the user cannot change them, such as for a call center environment where the Agent's ability to change settings needs to be restricted. Examples of this include the authentication details, start-up application, start-up/post-call ACD state, or the frequency to refresh call center statistics. See 5.13 Locking Unity Settings

#### 3. Nextiva Unity - Supported Functionality

3.1 Nextiva Unity Telephony Features [Available in Nextiva Unity Agent and Supervisor]:

- 1. Call Control Answer/Release/Transfer/Conference etc.
- 2. Instant Messaging IM available to any other user in the Group that is also running Nextiva Unity
- 3. Service Configuration Allows the user to change their assigned services such as Call Forward
- 4. Busy Lamp Field Engaged/free/ringing extension status of monitored users
- 5. Engaged User Monitoring Hovering the mouse over an engaged [red icon] user will show the name or number of the other party and the current call duration, when viewing the list in Icon View. When viewing in List View, this information is available in the Status column. For privacy, this can optionally be disabled by Nextiva in the Nextiva Unity Portal
- 6. Active Call Window Graphical display of all active calls showing incoming Caller ID or name, dialled party and duration. For calls placed on Hold, the Hold duration is shown
- 7. Audible Alarms Users can specify a .wav file to be played when another user's extension is ringing to facilitate Manager/Secretary interworking, where the Secretary screens the Manager's calls



- 8. **Configurable Keyboard Shortcuts** Quick Keys: for example, to make F1 perform Answer/Release or CTRL + S to transfer the call to Sales
- 9. Call Logs Missed, Received and Dialled calls note: These are user calls not ACD calls
- 10. Directories Centralized Group, Outlook and Personal entries
- 11. Web Pop URL Ability to add incoming Caller ID to a URL for interpretation and screen pop by a webbased database application
- 12. Database Integration Ability to integrate with third party SQL and LDAP directories, including Active Directory

## Note: This guide does not cover the above functions. Please refer to Nextiva Unity Desktop Help, as these functions are uniform across all Nextiva Unity products.

<u>3.2 Nextiva Unity Agent Features</u> [In addition to the Telephony features above]

- 1. Join/Leave Queue Right click a queue to Join or Leave. The corresponding queue icon changes from green to red
- 2. Change ACD State Available, Unavailable and Wrap-up ACD states are clickable buttons
- 3. Call Center Name Presentation The name of the call center queue is displayed in the "To" field in the Active Call Window
- 4. Unavailable Codes As configured in NCC
- 5. Supervisor Escalation Alerting Supervisors that are assigned to the queue by call or IM
- 6. **Personal Wallboard** Displays the Agent's own, and overall stats, for the queues the Agent is a member of. Statistics include Total Calls, Answered Calls, Missed Calls, and Calls In Queue
- 7. **DNIS** Allows Nextiva Unity to change outbound CLI presentation. *Requires NCC Agent Premium user service assigned*
- ACD Behaviour Configure required ACD state [between Available, Unavailable and Wrap-Up] at start-up, post-call, and when the desktop PC is locked
- Configure Wrap-Up In Nextiva Unity Settings, the Agent can specify an automatic post call Wrap-Up duration
- 10. Disposition Codes As configured in NCC. Requires NCC Agent Premium
- 11. Abandoned Caller ID Call Back The Agent can call back abandoned calls if these have been assigned to the Agent by a Supervisor and mark them as Processed. *Requires Nextiva Unity Agent Enterprise, Nextiva Unity Supervisor Enterprise and Nextiva Unity Wallboard*

3.3 Nextiva Unity Supervisor Features [In addition to Nextiva Unity Agent Features above]

 Staffed Ratio – The Personal Wallboard in Supervisor also shows Staffed Ratio - the number of Agents that are available to take calls (by being Joined to the queue and in Available ACD state) against the total number of Agents assigned to the queue in NCC.



- Change Agent State Remotely change the ACD state of any monitored Agent from Available/Unavailable/Wrap-Up/Sign-In/Sign-Out, and force Agents to Join and Leave queues
- 3. Force Join/Leave For any selected call center queue, automatically force all Agents in that queue to Join or Leave the queue
- 4. Threshold Alarms Ability to set thresholds for queues that will prompt a dialogue box, or optionally send an email, to the Supervisor when the threshold has been reached. Thresholds can be set against Calls In Queue, Average Wait Time, and Missed Calls and can be configured individually for each queue
- Call Barge-In The Supervisor can barge into an Agent's call providing the Supervisor has the Direct Call Pick-Up with Barge-In user service assigned in NCC
- Promote Queued Call From the Active Call Window, the Supervisor can promote a queued caller to the top of the queue
- 7. **Transfer Queued Call** From the Active Call Window, the Supervisor can select a call to answer themselves, or to transfer to another queue
- 8. **IM All Agents** For any selected call center queue, the Supervisor can send an instant message to all supervised Agents
- 9. Silent Monitoring Allows the Supervisor to silently monitor the next call, or calls, taken by a specific Agent. Requires the Call Center Monitoring service assigned to the Supervisor in Nextiva Call Center, and is only available with a premium Nextiva Call Center
- 10. Agent and Queue Reporting Provides real-time and historical reports. Requires the NCC server to be deployed
- 11. Daily Stats CSV Export For any selected Agent or Queue, the Supervisor can export current daily stats as .csv
- 12. Abandoned Call Back Nextiva Unity Supervisor will import a list of the Caller ID's of abandoned calls into the call center, listed by Call Center ID, DNIS, Name/Number and Date/Time stamp. The Supervisor can assign these to Agents for callbacks. *Requires Nextiva Unity Wallboard and Nextiva Unity Agent Enterprise*

## 3.4 Nextiva Unity Wallboard Features

- 1. **Graphical Interface** Provides a visual representation of call center activity in a configurable, tabular format
- 2. Auto-Sizing Wallboard will auto-size to the dimensions of the host PC it is installed on
- Configurable Statistics Any number of queues and any mix of statistics can be displayed. The statistics available are: Calls In Queue, Longest Wait Time, Average Wait Time, Missed Calls, Received Calls, Answered Calls and Staffed Ratio
- 4. **Configurable Interface** Font size and grid lines can be changed, queues can be set to scroll, and important queues can always be displayed at the top



- 5. Alarm Thresholds For any selected statistic, thresholds can be set that when breached, will highlight the breached stat inside a black box
- 6. **Highlight Non-Zero Values** Any selected statistic can optionally be highlighted in red when it has current activity
- Event Recorder Wallboard includes Nextiva Unity Event Recorder. This captures transactions on the monitored call centers and is required for the Abandoned Caller ID Call Back capability to be visible to Nextiva Unity Supervisor Enterprise and Nextiva Unity Agent Enterprise

## 4. Nextiva Unity Initial Set-Up

Upon installation, Nextiva Unity will ask for the NCC Username and Password. Other details (covered below) should be pre-populated. Call Center authentication details also need to be added for Nextiva Unity Agent, Supervisor and Wallboard as addressed below.

Authentication Credentials Location:

Server Address:	Settings [button] > Settings [tab] > Network
User and Call Center ID:	Settings [button[ > Settings [tab] > Authentication
Unity Product:	Settings [button] > Settings [tab] > Start-Up – select from drop down list



## 4.1 Required Authentication Credentials by Nextiva Unity Variant

Nextiva Unity	Required Authentication Details	Notes
Version		
Desktop	Call Center Server Connection Details	The server address and port should be pre-populated. If not,
Agent, Supervisor	Server Address: cp.nextiva.com	the server address is the one provided by Nextiva
Wallboard	Server Port: 2208	
Desktop	Nextiva Unity Server Connection Details	These settings will be pre-populated
Agent, Supervisor	Server Address: im.unityclient.com	
Wallboard	Server Port: 2208	
Desktop	Nextiva Login Details	Your Username and Password are provided by Nextiva
Agent	Username: username@nextiva.com	
Supervisor	Password: userpassword	
Agent	Call Centers:	1. This is the Call Center ID and Call Center Password from
Supervisor	Login ID: callcentername	Nextiva, provided by Nextiva.
Wallboard	Password: callcenterpassword	2. When using Nextiva Unity Agent, the Call Center IDs are
		pre-populated. Double click the Call Center ID to enter the
		password.
		3. For Supervisor and Wallboard, the Call Center ID and
		Password must both be entered manually.
		4. For Supervisor, the user must be assigned as a Supervisor
		to the call center in NCC.

## 4.2 Nextiva Unity Agent & Supervisor – Entering Call Center IDs

Nextiva Unity will populate the call center queues that the Agent is assigned to. Double click a call center to enter its password. If there are multiple Agent queues with the same password, click the "Apply to all queues without a password" box. Then click the green tick to save.



Call Centers	Qudo Sales VanillaIP Sales Qudo Sales Ov Vanillaip Sales (	erflow Overflow	
	Alert me whe login fails	<u>Oudo Sales Loc</u> Login ID: Password:	ain Details QudoSales@drd.co.uk Apply to all queues without a password The call center logged in successfully.
			* *

## 4.3 Nextiva Unity Wallboard – Entering Call Center IDs

Open Nextiva Unity Wallboard, right click the title bar at the very top of the application, and follow the prompts below.



## 4.4 Agent, Supervisor and Wallboard - Statistics Refresh Timer

If the Client Call Control service is assigned to the queue in NCC then the "Calls in Queue" stat (as shown in Personal Wallboard in Agent and Supervisor and Wallboard) will be a real-time stat. The "Longest Wait" stat is also real-time, in that it will start showing the wait duration in seconds for the longest waiting call in queue from the point it was displayed, so if there are no calls currently in queue then this statistic will be zero. All other stats are polled from NCC on a default 900-second timer. The timer can optionally be configured to a minimum level specified by Nextiva, with the minimum permissible duration being 60 seconds.

## 4.4.1 Configuring Refresh Timer in Agent and Supervisor

Click Settings [button] > Statistics > specify duration





## 4.4.2 Configuring Refresh Timer in Wallboard

Right click the top bar in Wallboard > Nextiva Unity Wallboard Settings > Statistics - specify duration

Settings	
Unity Settings Unity Settings Startup Security Connection Network Proxy Authentication Call Center Wallboard Columns Support Statistics	Specify the statistics refresh frequency. Refresh statistics every 900 seconds Process call centers in 10 v



## 5. Unity Agent User Guide

## 5.1 Introduction to Main Interface

Q	Unity Agen	nt: Steve T	utt - Available	(duration: 02:	:39)									
	ACD Sta	Available	tons	elp Answer	Dial Cal	I Control B	Conference	Voicemail Se	ttings				Ç	uda
					My Statistic	S	Personal	Wallboard		Overall Que	ue Statistics			_
	Nam	ne	Total Calls	Answered Calls	Missed Call	5 Total Time On Calls	Average Talk Time	Total Calls	Answered Calls	Missed Calls	Calls In Queue	Longest V Time	Vait Average W Time	ait Average Talk Time
	Qudo Sa	ales	0	0	0	00:00	00:00	0	0	0	0	00:00	00:00	00:00
	Vanilla IP	Sales	4	1	3	00:49	00:49	4	4	0	1	00:04	00:06	00:23
	Summary		4	1	3	00:49	00:49	4	4	0	1		00:03	00:11
	From Charlot	tte Quarti	ý		-	To /anillaIP Sales (	VanillaIP Sales) Active Ca	all Window	00:0	ation DO	Stat Rin <u>c</u>	ius Jing		
	User Alastair Brown	Status Charlott Quartly	e Chris	Directories Cindy Baker	Colin Farrant	Call Logs Dave Dadds F	David Dea liggins Thomp	n Ed son Thrussel	Harry Dadds	Iain Sinnott	Junaid Qureshi	Laura Evans	Lewis Th Langley Var	My status: none omas ghese

#### 5.2 Using Personal Wallboard

The Personal Wallboard will show current performance metrics for the call centers the Agent is assigned to. The stats are broken down by "My Statistics" which shows the Agents individual performance, and "Overall Queue Statistics" which will show the current performance across the entire call center[s]. The "Calls in Queue" and "Longest Wait Time" stats are real-time, provided the Client Call Control service has been assigned to the call center in NCC. All other stats will poll NCC on a configurable timer. The red/green -/+ at the upper right hand corner of Personal Wallboard switches between showing all call centers individually (Maximised View), or a summary of all call centers combined (Minimised View).

#### Maximised View

	My Statistics						Overall Queue Statistics						
Name	Total Calls	Answered Calls	Missed Calls	Total Time On Calls	Average Talk Time	Total Calls	Answered Calls	Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	
Qudo Sales	0	0	0	00:00	00:00	1	1	0	0	00:00	00:03	00:50	
VanillaIP Sales	1	0	1	00:00	00:00	1	0	0	0	00:00	00:11	00:00	
Summary	1	0	1	00:00	00:00	2	1	0	0		00:07	00:25	

#### Minimised View

	My Statistics					Overall Queue Statistics					4	
Name	Total Calls	Answered Calls	Missed Calls	Total Time On Calls	Average Talk Time	Total Calls	Answered Calls	Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Summary	1	0	1	00:00	00:00	2	1	0	0		00:07	00:25

Note: Statsitics shown in Personal Wallboard reset every 24 hours at midnight.



#### 5.3 Changing ACD State

Clicking Unavailable, Available or Wrap-Up will change your availability for all queues you are a member of.



## 5.4 Using Unavailable Codes

When clicking Unavailable, any Unavailable codes that are entered in NCC are presented in a drop down list. Select the appropriate code.



## 5.5 Joining & Leaving Queues

Right click any queue in the Personal Wallboard to switch between Join and Leave queue. Queues that you are Joined have a green icon next to them. A red icon indicates that you are not in that queue.





## 5.6 Receiving ACD Calls

Inbound ACD calls will diplay the call center name, as configured in NCC, in the "To" field. The "From" field will display the incoming Caller D (if not witheld) or the name of the caller if it can be matched from the Directory. Answer the call by lifting the IP phone handset or clicking the Answer/Release call control button.



#### 5.7 Using Disposition Codes

Nextiva Unity will expose Disposition Codes, as configured on Call Center Agent Premium in NCC, to Agents within the Active Call Window. The Agent can enter one or more Disposition Codes by right clicking the active call and selecting from the drop down list. Disposition Codes can be entered while the call is active, or immediately after, when the call has ended and before another call is answered. Only Disposition Codes configured for the queue that the Agent has answered are displayed.

## Adding Disposition Codes While Call is Active

From	То	Duration	Status	
Steve is a Cust	Nuts Sales (Nuts Sales)	00:20	Active	
	Add number to personal directory			
	Assign disposition code	Selected call	•	Brochure Request
	L	Last call between Nu	its Sales and Steve is a Cust	Sales Call
				French Holiday

#### Adding Disposition Codes Post Call

From	То			Duration	Status		
	Assign disposition code	•	Last call b	etween Nuts Sales ar	id Steve is a Cust	•	Brochure Request
							Sales Call
							Spanish Holiday
							French Holiday

#### 5.8 Auto Answer

Nextiva Unity Agent optionally allows ACD calls to auto-answer when the Agent is in the "Available" state. This is switched on/off in Settings [button] > Service > Agent.

Automatically answer call center calls when I'm available

#### 5.9 Alerting Supervisors

Right click a call center queue in the Personal Wallboard and select "Supervisors" (this option is available for both queues you have a Joined status and those that you are not currently in). This will populate a list of Supervisors that are assigned to the queue in NCC. You can alert the selected Supervisor by calling them (if there is a current call in progress, this will put that call on Hold), or sending an instant message (provided the selected Supervisor has Nextiva Unity open).



			Μ	ly Statistic	S				Overal	Queue Stat		
Name		Total Calls	Answered Calls	Missed Calls	Total Time On Calls	Average Talk Time	Staff Ratio	Total Calls	Answered Calls	Missed Calls		
Qudo	Call					00:00	4/5	1	1	0		
🔘 Vanilla	Can o	lucuc				00:00	4/5	1	0	0		
Summar	Leave	e queue				00:00	8/10	2	1	0		
Fror	Refre	sh statistics	5						Duration			
	Show	agent stat	istics		- T							
	Agen	its			•							
	Supe	rvisors			•	Chris Tut	tt 🕨	Cal	I			
	Insta	nt message	all supervis	ed agents		Iain Sinn Laura Eva	ott ) ans )	Inst	Instant message			
User St	atus		Directori	es		Dave Dag	dds 🕠	ent Stati	stics			
	8	6		3	9	8	R	8	8	-		

#### 5.9.1 Configuring Supervisor List

There are two Supervisor display options; All Supervisors in the Call Center or only those Supervisors that are currently supervising the Agents (as configured in NCC). This option is controlled in Settings [button] > Services > Agent.

When listing supervisors:

- ⊙ Include all supervisors in the call center
- $\bigcirc$  Include only those supervisors that are currently supervising me

#### 5.10 Activating Outbound DNIS

If the Agent is a member of NCC premium queues, and the DNIS capability has been configured in NCC, then the Agent can select an outbound DNIS, which will determine which outbound Caller ID is presented when the Agent makes calls. Right click the Dial icon and hover your mouse over "Change Outbound Number" at the bottom (the numbers above are a clickable list of the last 10 numbers for redial). The outbound DNIS that are available are presented. The current outbound DNIS selected is checked. This will affect all outbound calls until the outbound DNIS setting is changed, or set to none.



Die		Voio	email	Settings		
My S	Charlos Charles				Overall Queu	e Statis
Miss	Appendiate	ital	Calls	Answered Calls	Missed Calls	Calls Quei
	Prove Street	0		0	0	0
	Carl Carl	2		0	0	0
	Agent 7 580	2		0	0	0
	Quality Supports			D	uration	
	Calin Fament					
	Change outbound number	1	Nuts	Sales (Nuts Inte	ernational)	
			Nuts Bolts	Sales (Nuts UK) Sales (Bolts Int	ernational)	-
$\gamma$	Call Logs		Bolts	Sales (Bolts UK	)	
8		2	None			0

#### 5.11 Abandoned Caller Call-Back

If a Supervisor has assigned the Agent's abandoned calls to ring back, they are accessed under the "Abandoned Calls" radio button in the Call Logs tab. The Supervisor that assigned the call back to the Agent is also listed. Double click an entry to call the abandoned call back. This will automatically change the outbound DNIS for this call to that which the call was received on, assuming outbound DNIS is in use. When the call is complete, right click and select "Mark as Processed." This will remove the call from the Agent's list and flag it as completed for the Supervisor.

User Status	Directories	Call Logs					My state	us: none
O Missed calls	O Received calls	⊖ Dialled calls	⊙ Abandoned calls				2	
Call Date	Call Center	DNIS	Number	Name		Assigned By	Assigned Date	
2 Apr 2013 @ 12:14 2 Apr 2013 @ 12:16 2 Apr 2013 @ 12:51	Qudo Support Qudo Support Overflow Qudo Support Overflow	300 	00074000100	Dates Mad Dates Mint	lier lau	Steve Tutt Steve Tutt	Today @ 16:08 Today @ 16:08	
2 Apr 2013 @ 12:51 2 Apr 2013 @ 13:01 2 Apr 2013 @ 14:54	Qudo Support Overflow Availle Support		01240019800	and in case	Assigned	Ву	Assigned Date	
2 Apr 2013 @ 14:57	Availle Support		0000000000	at for	Steve Steve	Call number		
					Steve	Mark as proces	sed :08	
					Steve Tu	tt	loday @ 16:08	
					Steve Tu	tt	Today @ 16:08	

Note: This feature requires the Enterprise version of Nextiva Unity Agent and Supervisor, and also requires the customer to be running Nextiva Unity Wallboard.



## 5.12 Running Agent Personal Reports

Nextiva Unity Agent provides access to the following reports:

- 1. Agent Activity Detail Report
- 2. Agent Activity Report
- 3. Agent Call Detail Report
- 4. Agent Call Report
- 5. Agent Duration Report
- 6. Agent Sign-In/Sign-Out Report

To access these reports, and specify the reporting period, click Tools > Call Centers > Report Viewer. From the Report Viewer interface (shown below), select the desired report and reporting period.

Template	Agent Activity Detail Report	
Start Period	Agent Activity Detail Report	
Start Period	Agent Activity Report	
End Period	Agent Call Detail Report	
	Agent Call Report	
	Agent Duration Report	
Sampling	Agent Sign In Sign Out Report	



## 5.13 Customizing Nextiva Unity Queue Availability and Behaviour

Nextiva Unity Agent offers a cascading heirarchy of availability settings and behaviour that can be configured. This allows for Nextiva Unity to start on Windows boot, automatiocally Join the Agent to their assigned queues, make them immediately Available, and auto-answer ACD calls, or any variation within that chain. Options are as follows;

Action	Behaviour Configuration Options	Configuration Location	Example
OS Boot	Auto-start Nextiva Unity [select as	Settings [button] > Settings	Fig 1
	Desktop, Agent, Supervisor or	[tab] > Startup – select type	
	Wallboard]. Optionally Nextiva Unity	from drop list	
	can start minimized to the taskbar.		
Nextiva Unity Open/Close	Allows the user to specify Join Queue	Settings [button] > Settings	Fig 2
	when Nextiva Unity starts and	[tab] > Startup – select type	
	computer is unlocked, and Leave	from drop list	
	Queue when Nextiva Unity is closed or		
	computer is locked		
Nextiva Unity Close	Activate Sign Out when Nextiva Unity is	Settings [button] > Settings	Fig 3
	closed	[tab] > Services > Call Center	
Start-Up and Desktop Locked	Preset Available, Unavailable or Wrap-	> Agent > ACD State	Fig 4 and Fig 4.1
Post ACD Call State	Up ACD state (Unavailable codes are		
Desktop Locked ACD State	supported if configured in NCC)		
Wrap-Up Duration	Allows the Agent to specify Wrap-Up (in		Fig 5
	seconds) that will apply post-ACD call.		
	The Agent state will change to Wrap-Up		
	before returning to Available at the end		
	of the timer		
Prevent Changing ACD State on	Prevents the Agent from changing state		Fig 6
ACD Call	when they are currently on a call center		
	call		
Auto Answer ACD Call	Switch Auto Answer on/off, typically	Settings [button] > Settings	Fig 7
	used in conjunction with a headset.	[tab] > Services > Call Center	
Specify Supervisor List [when	Determines which Supervisors are	> Agent	Fig 8
right clicking call center queue in	displayed, those assigned to the call		
Personal Wallboard]	center in NCC, or only those that are		
	monitoring the Agent		



*Note:* These settings can be locked to require Admin rights to the local computer in order to prevent Agents from unnecessarily changing behaviour.

#### Fig 1 – Auto start Nextiva Unity on operating system boot

•

- Auto start Unity on operating system boot
   Always auto start in minimized state

Startup application:

Unity Call Center Supervisor

Fig 2 - Join/Leave Call Centers on Nextiva Unity Start

Join all m	y call centers
🗌 whe	n Unity is starting
🗌 whe	n the computer is unlocked
Leave all	my call centers
when	n Unity is closing
🗆 whei	n the computer is locked

Fig 3 -Activate Sign Out when Nextiva Unity is Closed

Activate sign-out ACD state when Unity is closing.

## **Configuring ACD State with Desktop**

Nextiva Unity Agent can be pre-set with an ACD state for Desktop Start-up and Unlock, Post-Call and Desktop Locked. In the below example, the Agent ACD behaviour is set to "Available" at all times. This is configured in Settings [button] > Services > Call Center > Agent > ACD State

## Fig 4 – Configuring ACD State

unlocked ACD state	Available	-
Post call ACD state	Available	•
Desktop locked ACD state	Available	-
Wrap-up duration (sec)	0	loging
Wrap-up duration (sec) ✓ Activate sign-out ACD st □ Prevent me from manuation when on a call center called the second secon	0 ate when Unity is cl ally changing my AC all.	losing. D state



Fig 4.1 – Configuring ACD State showing Unavailable Codes



## Fig 5 Wrap-Up Duration

Wrap-up duration (sec) 0

Fig 6 Prevent Changing ACD State While on a Call

Prevent me from manually changing my ACD state when on a call center call.

## Fig 7 Auto Answer ACD Call

Automatically answer call center calls when I'm available

#### Fig 8 – Specify Supervisor List

- When listing supervisors:
- Include all supervisors in the call center
- O Include only those supervisors that are currently supervising me



## 5.14 Locking Nextiva Unity Settings

Nextiva Unity settings can be locked so that they can only be changed by a user with Administrator rights to the local computer. This is activated in Settings [button] > Settings [tab] > Security.

Services Setting	gs
Unity Settings - Appearance - Computer/Phone Integration - Dialing Rule - Outom Directory Integration - Outlook Integration - Outlook Integration - Unity Connect - Unit	Specify whether Unity settings can only be modified by an administrator of this computer.



## 6. Nextiva Unity Supervisor User Guide

## 6.1 Nextiva Unity Supervisor Main Interface

Unity Supervisor: St	eve Tutt -	Available (du	uration: 03	:14:56)										
				Call	Control	Buttons			~			01	ida	
Unavailable		p Answer	Dial	Trans	sfer Hol	d Confer	ence) Vo	picemail Se	ettings			gu		
		Μ	ly Statisti	cs.		Overall Queue Statistics								
Name	Total Calls	Answered Calls	Missed Calls	Total Time On Calls	Average Talk Time	Staff Ratio	Total Calls	Answered Calls	Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	
Qudo Sales	0	0	0	00:00	00:00	3/5	0	0	0	0	00:00	00:00	00:00	
VanilaIP Sales	1	0	1	00:Pe	rsonal W	/allboard	1	0	0	1	00:03	00:00	00:00	
Summary	-	0	-	00.				0	0	-		00.00	00.00	
From				То				Duration	1	Statu	s			
Charlotte Quar	tly			VanillaIP Sa	ales		00:02 Queued at po					on 1		
Charlotte Quar	tly			VanillaIP Sa	ales (VanillaI	P Sales)		00:00		Ringin	Ig			
				Act	ive Call \	Nindow								
User Status	$\gamma$	Directori	ies	C	all Logs	A	Agent Statistics Agent Statistics					Tab My status: none		
User Name				ACD State			Status							
Alastair Brown			1	Unavailable									<u>^</u>	
Charlotte Quar	tly			Available Sign-Out B	usy Lam	p Field	to 08009700971 & VanillaIP Sales - +442082881233						33	
Cindy Baker														
Colin Farrant				Unavailable			Talk	king to 0195	9701159				-	
David Higgins				Available										
Dean Thompso	n			Sign-In										
Door Entry				Avaibble										
		Do not disturb activated												
Ed Thrussell		Sign-Out		Do	not disturb a	ctivated								
Ed Thrussell				Sign-Out Sign-In			Do	not disturb a king to 0208	ctivated 5889570					

## 6.2 Personal Wallboard

If the Supervisor is not also an Agent for the queue in NCC, then they will not be able to Join/Leave or take calls for those queues. The Join/Leave status icon will show as grey and there will be no stats in the "My Statistics" window as below.

		My Statistics						Overall	Queue S	tatistics				
Name	Total Calls	Answer ed Calls	Missed Calls	Total Time On Calls	Average Talk Time	Staff Ratio	Total Calls	Answer ed Calls	Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	
Qudo Support Overflow	-	-	10	1.7	373	4/4	10	8	2	0	00:00	00:51	03:38	*
VanillaIP Support Overflow	-	-	-	. <del></del>	-	3/4	3	2	1	0	00:00	00:22	06:32	E
Qudo Support	-	-	-	-	-	4/4	34	24	10	0	00:00	00:03	01:41	
VanillaIP Support	-	2	-	1	220	4/5	8	4	4	0	00:00	00:04	00:40	
Qudo Sales	0	0	0	00:00	00:00	4/5	0	0	0	0	00:00	00:00	00:00	*
Summary	2	0	2	00:00	00:00	23/27	57	40	17	0		00:10	01:38	



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**6.2.1 Staffed Ratio** –Personal Wallboard in Nextiva Unity Supervisor includes "Staffed Ratio", an additional stat that is not available in Nextiva Unity Agent. For each queue, Staffed Ratio shows the total number of Agents that are available to take calls (i.e. those that are Joined to the queue and have ACD state set to Available), out of the total number of Agents assigned to the queue in NCC.

**6.2.2 Longest Wait Statistic** – By default Nextiva Unity Supervisor displays the "Longest Wait Time" stat. This shows the wait time of the longest waiting call in the queue. If there are no calls in queue, this will be zero. This stat can optionally be removed in Settings > Services > Supervisor.

Include the 'Longest Wait Time' statistic

**6.2.3 Instant Message All Agents** - Right clicking a queue in the Personal Wallboard will present the Supervisor with a list of actions. Select "Instant message all supervised agents", and the instant message will only be sent to those agents that are supervised by the supervisor and are currently online.

## 6.3 Agent Statistics Tab

The Agent Statistics tab will show busy lamp status, ACD state, and current daily stats for all Agents in a selected call center (Queue View) or an individual Agent's performance and availability for the queues they are assigned to (Agent View).

- Force all Agents to Join Queue [Queue View] or Force Agent to join all queues they are assigned to [Agent View]
- Force all Agents to Leave Queue [Queue View] or Force Agent to leave all queues they are assigned to [Agent View]
- Refresh statistics
- Export statistics as .csv file

## 6.3.1 Agent Statistics Tab – Queue View

A call center can be selected either by clicking into the Agent Statistics tab and then clicking the "Queue" radio button and selecting from the drop down list, by right clicking a queue in the Personal Wallboard and selecting "Show Agent Statistics," or by double clicking the queue in the personal wallboard. Right clicking an individual Agent allows the Supervisor to Join or Leave them to/from the selected queue, and also change their ACD state (which will affect their availability to all queues they are assigned to). Also, Supervisors can right click the menu to instant message and call Agents. Double clicking any Agent will also make a call to them.





Directories Call Logs Agent Statistics				My status:					
aIP Sales	▼ ⊙ Que	eues 🔿 Agents			• •	\$			
ACD State	Total Calls	Answered Calls	Missed Calls	Total Time On Calls	Average	Talk Tin	ne		
Available	0	0	0	00:00	00	:00			
Available	0	0	0	00:00	00	:00			
Sign-Out	0	0	0	00:00	00	:00			
Sign-Out	0	0	0	00:00	00:00				
Sign-Out	0	0	0	00:00	00	:00			
	Directories JIP Sales ACD State Available Available Sign-Out Sign-Out	Directories     Call Log       IIP Sales     ▼     • Que       ACD State     Total Calls       Available     0       Available     0       Sign-Out     0       Sign-Out     0	Directories     Call Logs     Agent Stat       IIP Sales <ul> <li>Queues</li> <li>Agents</li> </ul> Agents     Agents <td>Directories     Call Logs     Agent Statistics       IIP Sales     ▼     • Queues     Agents       ACD State     Total Calls     Answered Calls     Missed Calls       Available     0     0     0       Available     0     0     0       Sign-Out     0     0     0       Sign-Out     0     0     0</td> <td>Directories     Call Logs     Agent Statistics       IJP Sales     ▼     O Queues     Agents       ACD State     Total Calls     Answered Calls     Missed Calls     Total Time On Calls       Available     0     0     0     00:00       Available     0     0     00:00       Sign-Out     0     0     00:00       Sign-Out     0     0     00:00       Sign-Out     0     0     00:00</td> <td>Directories     Call Logs     Agent Statistics       IIP Sales        <ul> <li>Queues</li> <li>Agents</li> <li>Agents</li> <li>AcD State</li> <li>Total Calls</li> <li>Answered Calls</li> <li>Missed Calls</li> <li>Total Time On Calls</li> <li>Average</li> <li>Available</li> <li>0</li> <li>0</li></ul></td> <td>Directories     Call Logs     Agent Statistics     My statu       IJP Sales        <ul> <li>Queues</li> <li>Agents</li> <li>Agents</li> <li>AcD State</li> <li>Total Calls</li> <li>Answered Calls</li> <li>Missed Calls</li> <li>Total Time On Calls</li> <li>Average Talk Tim</li> <li>Available</li> <li>0</li> <li>0</li></ul></td>	Directories     Call Logs     Agent Statistics       IIP Sales     ▼     • Queues     Agents       ACD State     Total Calls     Answered Calls     Missed Calls       Available     0     0     0       Available     0     0     0       Sign-Out     0     0     0       Sign-Out     0     0     0	Directories     Call Logs     Agent Statistics       IJP Sales     ▼     O Queues     Agents       ACD State     Total Calls     Answered Calls     Missed Calls     Total Time On Calls       Available     0     0     0     00:00       Available     0     0     00:00       Sign-Out     0     0     00:00       Sign-Out     0     0     00:00       Sign-Out     0     0     00:00	Directories     Call Logs     Agent Statistics       IIP Sales <ul> <li>Queues</li> <li>Agents</li> <li>Agents</li> <li>AcD State</li> <li>Total Calls</li> <li>Answered Calls</li> <li>Missed Calls</li> <li>Total Time On Calls</li> <li>Average</li> <li>Available</li> <li>0</li> <li>0</li></ul>	Directories     Call Logs     Agent Statistics     My statu       IJP Sales <ul> <li>Queues</li> <li>Agents</li> <li>Agents</li> <li>AcD State</li> <li>Total Calls</li> <li>Answered Calls</li> <li>Missed Calls</li> <li>Total Time On Calls</li> <li>Average Talk Tim</li> <li>Available</li> <li>0</li> <li>0</li></ul>		

Right click a queue in Personal Wallboard and select "Show Agent Statistics "as shown below. This will automatically load the selected queue's Agents into the Agent Statistics tab.

1			М	y Statisti
	Name	Total Calls	Answere d Calls	Missed Calls
Qudo Su	pport	20	-	-
Vanilla IP	Support		-	
Qudo	Call queue			0
Vanilla 🖉	con queue			0
Qudo	Leave queue			0
Summai	Refresh statistics			0
Fror	Show agent statistics			
	Agents		×	
	Supervisors		•	
	Instant message all supervise	ed agents		

## 6.3.2 Agent Statistics Tab - Agent View

To display an Agent's queue membership and their current status, click the "Agents" radio button in the Agent Statistics tab and select from the drop down menu. Right clicking an individual queue allows the Supervisor to Join/Leave the Agent to/from each queue or to change their ACD state for all queues the Agent is a member of.

User Status	Directories	Call Log	s Agent S	tatist	ics				M	y statu	us: no
Agent Ch	nris Tutt	▼ O Que	eues ⊙ Agents					0	0		6
Name	ACD State	Total Calls	Answered Calls		Missed Calls	Total Tim	e On Calls	Av	erage '	Talk Ti	me
Qudo Sales VanillaIP Sales VanillaIP Support	Available Available Available	0 0 0 tus	0 0 0 Directories	Ý	0 0 0 Call Logs	00: 00: 00:	:00 :00 :00 Agent Sta	tistic	00: 00: 00:		
	Ag	gent Chris Tutt		•	Queues		Agents				
	Name		ACD State		Total Cal	ls	Ans	were	ed Cal	ls	
	Qudo Sales VanillaIP Sale VanillaIP Sup	es iport	Sign-In Sign-In Sign-In	•	Join Queue Leave Queue Sign In Available Unavailable				•		
	Totals	_	2/3		Sign-Out						
					Call				1		
					Instant message						



#### 6.4 User Status [Busy Lamp Field]

The User Status tab will show the current status of up to 20 other users. By default monitored contacts are displayed in the "Icon" view which shows their busy/ringing/engaged extension status. By right clicking anywhere in the User Status window, Nextiva Unity Supervisor can be configured to display monitored contacts in "List" mode. This will now also display their ACD state and call information for engaged users.

## User Status – Icon View

User	r Status	Di	rectories	$\gamma$	Call Logs		Agent Statist	ics				My status: none
					<u>_</u>		<u>_</u>	<u>_</u>	8		<u>_</u>	
Alastair Brown	Charlotte Quartly	Chris Tutt	Cindy Baker	Colin Farrant	Dave Dadds	David Higgins	Dean Thompson	Door Entry	DRD Boardroom	Ed Thrussell	Harry Dadds	Iain Sinnott
Junaid Qureshi	Laura Evans	Lewis Langley	Office Dect	Thomas Varghese								

## User Status – List View

My status: none		Agent Statistics	Call Logs	Directories	User Status	$\bigcap$
		Status	CD State		User Name	
*	325317651	Talking to 013	vailable		Alastair Brown	
			vailable		Charlotte Quartly	R
			ign-Out		Chris Tutt	B
					Cindy Baker	8
			lign-In		Colin Farrant	2
			vailable		Dave Dadds	8
			vailable		David Higgins	2
E			lign-In		Dean Thompson	8
					Door Entry	8
	o activated	Do not disturb	ign-Out		DRD Boardroom	8
			lign-In		Ed Thrussell	R
			lign-In		Harry Dadds	8
			vailable		lain Sinnott	B
					Junaid Qureshi	8
			vailable		Laura Evans	B
-			vailable		Lewis Langley	B

**User Status – Changing View** – Right click anywhere in User Status to switch the view between Icon and List and to select monitored users.

Manage user list					
Appearance	•	Change view	•	<b>v</b>	Icon
					List

**6.4.1 Barge-In** – The Supervisor can barge-in to an Agent's call by right clicking the engaged (red) Agent in User status and selecting "Barge-in to this call" from the drop down menu.



Note: The Supervisor requires the "Direct Call Pick-Up with Barge-In" user service assigned in NCC.



## 6.5 Remotely Changing Agent State

The Supervisor can change the Agent's availability to the call center either from the Personal Wallboard, Tools menu or Agent Statistics tab. The available actions will force the Agent to Join or Leave specific queues and change their ACD state, including the unavailable reason code if applicable. The Supervisor can also specify an Unavailable code when selecting this state. The Supervisor can also Call or Instant Message the Agent from the drop down list.

#### 6.5.1 Remotely Changing Agent State from Personal Wallboard

Right clicking any queue in the Personal Wallboard will present a drop down list of options. Hover over "Agents" to see a list of all Agents assigned to the selected queue. Hovering over the Agent will also present the Supervisor with options to Join/Leave the Agent from the queue and change their ACD State.

Total Calls	Answered Calls	Missed Calls	Total Time On Calls	Average Talk Time	Staff Ratio	Total (
-	-		·			
-			-	-	3/4	1
	-	-	-	-	4/5	17
-	-	-	-	-	4/5	2
0	0	0	00:00	00:00	2/5	0
	0	0	00:00	00:00	2/5	0
	ρ	0	00:00	00:00	19/29	23
	Т	0				
	+ 0	hris Tutt	•	Join Qu	eue	
	+ C	harlotte Qua	tly 🕨	Leave Q	ueue	
sed agents	Ia	in Sinnott	•	Sign In		Γ
ories	L	aura Evans	•	Availab	le	
0				Unavail	able	
				Unavan	ubic	·
Cindy Co	lin Da	ve Dav	id De	Wrap-U	p	
Baker Farr	ant Dad	lds Higg	ins Thom	Sign-O	ut	Т
				Call		
				Instant	message	
	ories Cindy Co Baker Farr	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 1 To To Chris Tutt Charlotte Quat Jain Sinnott Laura Evans Cindy Colin Baker Farrant Dadds Higg	0     0     00:00       0     0     0       0     0     0       0     0     0       0     0     0       0     0     0       0     0     0       0     0     0       0     0     0       0 <t< td=""><td>0     0     0     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     0     00:00       0     0     0     0       0     0     0     0       0     0     0     0       0     0     0     0       0     0     0     0       0     0     0     0       0     0     0     0       0     0     0     0       0     0     0     0       0     0     0<!--</td--><td></td></td></t<>	0     0     0     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     00:00     00:00       0     0     0     00:00       0     0     0     0       0     0     0     0       0     0     0     0       0     0     0     0       0     0     0     0       0     0     0     0       0     0     0     0       0     0     0     0       0     0     0     0       0     0     0 </td <td></td>	



## 6.5.2 Remotely Changing Agent State from Agent Statistics Tab

To display an Agent's queue membership and their current status, click the "Agents" radio button in the Agent Statistics tab and then select from the drop down list. Right clicking an individual queue allows the Supervisor to Join/Leave the Agent to/from each queue or to change their ACD state for all queues the Agent is a member of.

Agent Chris Tutt						
	<u> </u>	) Queues 💿 Agents			0	-
Name ACD S	State Total Calls	Answered Calls	Missed Calls	Total Time On Calls	Average T	alk Time
Qudo Sales Availa	able 0	0	0	00:00	00:0	0
VanillaIP Sales Availa	able 0	0	0	00:00	00:0	0
VanillaIP Support Availa	able 0	0	0	00:00	00:0	0

User Status	Directories	Y	Call Logs	Agent Statistics
Agent Chris	Tutt		Queues	⊙ Agents
Name	ACD State		Total Calls	Answered Calls
Qudo Sales VanillaIP Sales VanillaIP Support	Sign-In Sign-In Sign-In	•	Join Queue Leave Queue Sign In Available Unavailable	•
Totals	2/3		Wrap-Up Sign-Out Call Instant message	

## 6.5.3 Remotely Changing Agent State from Tools Menu

Clicking Tools > Call Centers will list the call centers currently being supervised. Hover over a call center > Agents to change the Agents ACD state.



U	Unity Supervisor: Steve Tutt - )	Available (duration: 07:27)	-	contribution in its	-						l			×	
	File Messaging Tools	Haln Custom directory Call centers		Report Viewer							9	ύ	C	R	
h		Settings		Qudo Support Overflow	•	Call queue			ł						
	Name	0.0		Qudo Sales		Agents			•	Alastair	Brown	•	-	-	
Ш		Total Calls		Vanillar Support Overflow		Supervisors			•	Colin Fa	rrant	+	۲	Join Queue	- 1
	VanillaIP Support Overflow	-		VanillalP Sales Qudo Support	•	Instant mess	sage all supe	rvised agen	ts	Lewis La	ngley	*		Leave Queue	
	Qudo Support VanillaIP Support	-		VanillaIP Support	·T	59 14	8	53 6	0	Ed Thru	iggins ssell		۲	Sign In	
	Qudo Sales	0		Qudo Sales Overflow (agent only)	- F	0	0	0	0 4		00.00	-0		Available	
11	Qudo Sales Overflow (agen	t only) 0		Vanillaip Sales Overflow (agent only)	+ _	0	0	0	0	00:00	00:00	0		Unavailable	
	Summary	1	-	0 00110 00110	9	102	53	48	0		00:21	0		Wrap-Up Sign-Out	
	From			То		Dura	tion		Status					Sign out	
														Call	
														Instant message	

## 6.6 Threshold Alerts

Thresholds allow the Supervisor to configure performance triggers against various parameters for all the queues they are supervising. These will not affect the call handling and construction of the queue, but are designed as a warning that the call center is experiencing abnormal behaviour and will allow the Supervisor to take action.

The following queue parameters can have thresholds set against them;

- o Calls in Queue
- o Average Wait Time
- o Missed Calls

## 6.6.1 Configuring Thresholds

Click Settings [button] > Settings [tab] > Supervisor – double click the call center ID to set thresholds. Optionally select the "Apply to all queues" box if the same stats are to be applied to all queues. Select the green check to confirm.



Services Set	ttings		
Incoming Calls — Anonymous Call Rejection — Call Forward Always — Call Forward Busy — Call Forward No Answer — Call Center — Agent — Agent — AcD State Supervisor	Configure call c alerts can also reached. The assigned to the calls. Autor ageni E Only staffe	enter supervisor settings. Individual be set when overall queue thresholds are lient Call Control service must be call center in order to show queued natically add all agents to my supervised list. nclude my supervised agents in the d ratio	
	Show	queue:	Qudo Sales
Comm Pilot Express Available: In Office Available: Out Of Office	Queue Qudo Suppor	Calls in queue	12
Busy Unavailable	Qudo Sales VanilaIP Supp VanilaIP Sales	or Average wait time (sec)	32
- Do Not Disturb - External Calling Line ID Delivery	Qudo Suppor VanillaIP Supp	Missed calls	0
Simultaneous Ring	Qudo Sales O Vanillaip Sales	On Send email to	steve@kakapo.com
Lalling Line ID Delivery Blocking Call Control	-		Apply to all queues
		=	

## 6.6.2 Alerting Options – Dialogue Box and Email

Nextiva Unity Supervisor will receive a pop-up dialogue box indicating the threshold that has been breached.



When the "Send email to" field has been populated, the Supervisors will send an alert via email as shown below.



This is an automated email from Unity (Steve Tutt) because the below alert threshold has been reached: Business: drdcommunications Queue: VanillaIP Sales Alert type: Calls in queue Alert value: 1 Current value: 1

#### 6.7 Silent Monitoring

Allows the Supervisor to silently monitor the next call, or calls, taken by a specific Agent. This requires the Call Center Monitoring service assigned to the Supervisor in NCC. This also requires the Agent Premium Call Center.

To activate Silent Monitoring, right click the call center queue in Personal Wallboard > select the Agent > select Next Call Only or All Calls.

Name     Total Calls     Answered Calls     Missed Calls     Total Time On Calls     Average Talk Time     Staff Ratio     Total Calls     Answered Calls     Missed Calls     Calls In Queue       Avalle Support     -     -     -     -     4/4     1     1     0     0       Avalle Support Overflow     -     -     -     -     3/4     0     0     0       Bolts Sales     Call queue     0     00:00     00:00     -     0     0     0       Nuts Sales     Call queue     0     00:00     00:00     -     0     0     0       Qudo Sale     Join queue     0     00:00     00:00     00:00     -     0     0     0       Qudo Sup     Refresh statistics     -     -     -     4/4     15     11     4       Qudo Sup     Refresh statistics     0     00:00     00:00     00:00     4/5     0     0     0       VanillaIP S     Agents     Agent P 335     -     -     4/4     12     8     4       VanillaIP S     Agent P 550     Agent P 70     -     -     -     4/4     2     0     0       Wodify supervised agent list     Agent P 70 <td< th=""><th></th><th></th><th>Μ</th><th>ly Statistic</th><th>s</th><th></th><th></th><th></th><th>Overal</th><th>l Queue Sta</th><th>atistics</th></td<>			Μ	ly Statistic	s				Overal	l Queue Sta	atistics
Availe Support       -       -       -       -       4/4       1       1       0       0         Availe Support Overflow       -       -       -       -       3/4       0       0       0       0         Botts Sales       Call queue       0       00:00       00:00       4/7       0       0       0       0         Nuts Sales       Call queue       Join queue       0       00:00       00:00       -       0<	Name	Total Calls	Answered Calls	Missed Calls	Total Time On Calls	Average Talk Time	Staff Ratio	Total Calls	Answered Calls	Missed Calls	Calls In Queue
Availe Support Overflow       -       -       3/4       0       0       0       0         Bolts Sales       Call queue       0       00:00       00:00       4/7       0       0       0       0         Nuts Sales       Join queue       Join queue       0       00:00       00:00       -       0<	Avalle Support	-	-	-	-	-	4/4	1	1	0	0
Bolts Sales         Call queue         0         00:00         00:00         4/7         0         0         0         0           Nuts Sales         Join queue         Join queue         0         00:00         00:00         -         0<	Avalle Support Overflow	-	1.7				3/4	0	0	0	0
Nuts Sales         Call queue         0         00:00         00:00         -         0<	Bolts Sales			0	00:00	00:00	4/7	0	0	0	0
Premium t         Join queue         0         00:00         00:00         -         0 </td <td>Nuts Sales</td> <td></td> <td></td> <td>0</td> <td>00:00</td> <td>00:00</td> <td>-</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td>	Nuts Sales			0	00:00	00:00	-	0	0	0	0
Qudo Sale         Refresh statistics         0         00:00         00:00         4/5         0         0         0         0           VanillaIP S         Show agent statistics         0         00:00         00:00         4/5         0	premium t Join queue			0	00:00	00:00	-	0	0	0	0
Qudo Sup VanilaIP S VanilaIP S Vagents       Agent statistics       -       -       4/4       15       11       4       0         VanilaIP S VanilaIP S Vagents       Agent P 335       -       -       4/4       15       11       4       0         VanilaIP S VanilaIP S VanilaIP S VanilaIP S VanilaIP S Vagents       Agent P 335       -       -       4/4       15       11       4       0         Show agent statistics       0       00:00       00:00       00:00       4/5       12       8       4       0         From       Supervisors       -       Agent P 550       -       30/38       30       22       8       0         Modify supervised agent list Agent Y T38       -       -       -       -       -       Status         User Status       Directories       Call Logs       Agent Y T38       -       -       -       -       -       -       -       -       -       -       -       -       -       -	Qudo Sale			0	00:00	00:00	4/5	0	0	0	0
VanillaIP S       Show agent statistics       0       00:00       00:00       4/5       0       0       0       0         VanillaIP S       Agents       Agents       Agent P 335       3/4       2       2       0       0         Summary       Supervisors       Agent P 550       Agent P 670       30/38       30       22       8       0         From       Activate forced forwarding       DRD Boardroom       Agent Y T38       Eave Queue       Sign In       Available       Variable	Qudo Supi Refresh stati	stics		· ·	-	-	4/4	15	11	4	0
VanillaIP S       Agents       0       00:00       00:00       4/5       12       8       4       0         VanillaIP S       Agents       Agent P 335       3/4       2       2       0       0         Supervisors       Agent P 550       Agent P 670       30/38       30       22       8       0         From       Activate forced forwarding       DRD Boardroom       Agent Y T38       Image: Agent P 1738       Status       Status         User Status       Directories       Call Logs       Agent P 00       Wrap-Up       Wrap-Up	Vanilla IP St Show agent	statistics		0	00:00	00:00	4/5	0	0	0	0
VanillaIP S       Agents       Agent P 335       3/4       2       2       0       0         Summary       Supervisors       Agent P 550       30/38       30       22       8       0         From       Modify supervised agent list       Agent P 670       Agent P VVX600       Image: Constraint of the second se	VanillaIP S			0	00:00	00:00	4/5	12	8	4	0
Summary     Supervisors     Agent P 550     30/38     30     22     8     0       From     Modify supervised agent list     Agent P 670     Image: Constraint of the second se	VanillaIP St Agents		+	Age	nt P 335		3/4	2	2	0	0
From       Modify supervised agent list       Agent P 670       Image: Agent P 070       Image: Agent P 070 </td <td>Summary Supervisors</td> <td></td> <td>+</td> <td>Age</td> <td>nt P 550</td> <td></td> <td>30/38</td> <td>30</td> <td>22</td> <td>8</td> <td>0</td>	Summary Supervisors		+	Age	nt P 550		30/38	30	22	8	0
From       Modify supervised agent list       Agent P 0/0       Image: Constraint of the second se				100	nt D 670						
Agent P VVX600     Image: Constraint of the second se	From Modify supe	ervised agent	list	Age	nt P 070		_		h		Status
Activate forced forwarding DRD Boardroom Agent Y T38  User Status Directories Call Logs Activate forced forwarding DRD Boardroom Agent Y T38  User Status Directories Call Logs Activate forced forwarding DRD Boardroom Call Logs Call Content Directories Call Content Call Content Directories Call Content Directories Call Content Call Cont				Age	nt P VVX600		Join Qu	ueue			
Agent Y T38  Sign In Available Unavailable Wrap-Up	Activate for	ed forwardin	ng	DRD	Boardroon	n ≯	Leave	Queue			
Sign In Available Unavailable Wrap-Up				Age	nt Y T38						
Available     Unavailable     Unavailable     Wrap-Up     Wrap-Up							Sign In				
User Status Directories Call Logs Ac Wrap-Up							Availab	ole			
User Status Directories Call Logs Ac Wrap-Up							Unavai	lable	+		
	Lisor Status	Directorio	· ~	Call	0.00	A	Wran	In			
	User Status	Directories	5	Call	Logs	Au	wiap-	υþ			
Oueue Avalle Support	Queue Avalle Sur	port			Oueues	0.4	Sign-O	ut			
	Queue Maile Sur	pore		• •	Queues	U.	Call				
Name ACD State Total Calls Answe	Name	ACD State		Total Ca	lls	Answe	Cuir				; p
Abstair Brown Available 0	Alastair Brown	Available		0			Silent r	nonitor	•	Vext call on	ly f
Colin Farrant Sion-In 0 0 0 All calls	Colin Farrant	Sign-In		0			1		0 4	All calls	
David Higgins Available 0 0 0 0 00:00	David Higgins	Available		0		(	)		0		00:00
Lewis Langley Available 1 1 0 04:05	Lewis Langley	Available		1		t	L		0		04:05

## 6.7.1 Silent Monitoring Warning Tone

The Supervisor can optionally play the Agent a tone to alert them that they are being monitored. This can be switched on/off in Settings [button] > Settings [tab] > Supervisor.



Services	Settings	
Incoming Calls Anonymous Call Rejection Call Forward Always Call Forward Busy Call Forward No Answer Call Center Agent Agent Call Center Call Center Call Center Call Center Call Center Call Center Call Center Call Center Monito Call Center Monito Call Center Monito	Configu they and	re call center monitoring to alert the agent when a being monitored.

## 6.8 Queued Calls in Active Call Window

The Supervisor can optionally display queued calls, for the queues the Supervisor is monitoring, in the Active Call Window as shown below.

From	То	Duration	Status
Charlotte Quartly	VanillaIP Sales	00:04	Queued at position 1
Charlotte Quartly	VanillaIP Sales (VanillaIP Sales)	00:00	Ringing
Qudo Support	VanillaIP Sales	00:00	Queued at position 2
Qudo Support	VanillaIP Sales (VanillaIP Sales)	00:00	Ringing

Right clicking a queued call displays options for the Supervisor to re-order the call. The options are:

- Promote queued call
- o Transfer queued call
- o Directly answer a queued caller

From				То				Durati	on	Status		
Charlo Charlo	otte Quartly otte Quartly			VanillaI VanillaI	Move	to top of qu	Jeue	00.04		Queueo Ringing	at position 1	(previously ab
					Transf	er call			▶ to n	ne		
									to a	nother call co	enter 🕨	Avalle Support
User	r Status	Dir	ectories	$\gamma$	Call Logs		Agent Statisti	cs				Avalle Support Overflo Bolts Sales
	-							8		<b>A</b>		Nuts Sales
Alastair	Charlotte	Chris	Cindy	Colin	Dave	David	Dean	Door	DRD	Ed	Harry	premium test
Brown	Quartly	Tutt	Baker	Farrant	Dadds	Higgins	Thompson	Entry	Boardroom	Thrussell	Dadds	Qudo Sales



#### Switch Queued Calls On/Off

The ability to display queued calls in the Active Call Window can be switched on/off in Settings [button] > Settings [tab] > Supervisor, then check the "Show queued calls in my current call list".



## 6.9 Abandoned Calls in Active Call Window

Nextiva Unity Supervisor will keep a local cache of all abandoned calls into the call center that the Supervisor is monitoring. This allows the Supervisor to bring up a list of abandoned calls, and also flags Calls in Queue (see Calls in queue xx.xx) as having been previously abandoned.

			М	y Statist	ics				Overall	Queue S	tatistics			1	
	Name	Total Calls	Answere d Calls	Missed Calls	Total Time On Calls	Average Talk Time	Staff Ratio	Total Calls	Answere d Calls	Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time	
VanillaIP Su	pport	-	-	-	-	-	4/5	5	4	1	0	00:00	00:05	01:54	*
Vanilla IP	loo.	6	0	6	00:00	00:00	3/5	6	2	4	0	00:00	00:00	00:00	
Qudo S	Call queue			0	00:00	00:00	-	0	0	0	0	00:00	00:00	00:00	
Vanillaip				0	00:00	00:00	-	0	0	0	0	00:00	00:00	00:00	Ŧ
Summary	Leave queue			6	00:00	00:00	21/29	53	36	17	0		00:16	01:48	
	Refresh statistics									65					
From	Show agent statistics							Durati	on	5	status				\$2
02082 02082 02082	Show abandoned calls Clear abandoned calls			ales (\ ales (\ ales (\	/anillaIP Sa /anillaIP Sa /anillaIP Sa /anillaIP Sa	iles) iles) iles)		00:11 00:08 00:10		H H H	Abandone Abandone Abandone	d at 12:2 d at 12:2 d at 12:2 d at 12:2	3:27 5:15 5:27		
02004	Agents		· · ·	ales (1	diniidiP 3d	iles)		00.09		,	Dalloone	u dl 12.2.	1.19		
	Supervisors		•												
	Instant message all super	vised agen	ts												



From		То	Duration	Status	
02082881233		VanillaIP Sales (VanillaIP Sales)	00:02	Abandoned at 15:32:59	
02082881233		VanillaIP Sales (VanillaIP Sales)	00:02	Abandoned at 15:33:04	
02082881233		VanillaIP Sales (VanillaIP Sales)	00:02	Abandoned at 15:33:13	
Abandoned Cal	lerID	Queue that CallerID	Hold duration before	Date and time stamp	

Note: This function requires that real-time Calls in Queue is enabled.

#### 6.10 Abandoned Call – Caller ID Capture and Assign to Agent

Nextiva Unity Supervisor can capture the Caller ID of all abandoned calls into the call centers that the Supervisor is managing. This list can then be divided amongst Agents and assigned to them for call back. When the Agent has successfully contacted the abandoned caller, the call is marked as processed.

#### 6.10.1 Populating Abandoned Caller ID List

Click the "Call Logs" tab > Abandoned Calls and Nextiva Unity will automatically pull up records. Lists can be reordered by clicking Call Date, Call Center, DNIS, Number and Name. Calls that have already been assigned to Agents are shown in the "Assigned To" and "Assigned Date" columns. Once an Agent has completed an assigned call back and marked the call as processed, the call will be removed from this Supervisor list.

User Status	Directories	Call Logs	Agent Statistics			My status	: none
O Missed calls	O Received calls	Dialled calls	⊙ Abandoned calls			\$	
Call Date	Call Center	DNIS	Number	Name	Assigned To	Assigned Date	
26 Mar 2013 @ 16:34	Qudo Support Overflow		03300022016	Paul Warburton			*
26 Mar 2013 @ 16:36	VanillaIP Support Overfl		Privata	<b>Private</b>	Agent P 335	30 Apr 2013 @ 15:43	
27 Mar 2013 @ 14:09	Qudo Support		CONTRACTOR 3	Tax. Paggett	Agent P 335	30 Apr 2013 @ 15:43	
27 Mar 2013 @ 16:14	Qudo Support Overflow		02033260302	30 Minne			
27 Mar 2013 @ 16:45	Qudo Support		Printin	Britalia			
27 Mar 2013 @ 17:02	Qudo Support		67508868222	Lawse Langing (Multile)	DRD Boardroom	11 Apr 2013 @ 15:59	
27 Mar 2013 @ 17:40	Qudo Support		1,240	Lancin Langley	DRD Boardroom	11 Apr 2013 @ 15:59	
28 Mar 2013 @ 09:29	Oudo Support		0.20080-001000	Errol Highman	DRD Boardroom	11 Apr 2013 @ 15:59	
28 Mar 2013 @ 09:54	Qudo Support		0.21080-0.2000	Error Haltmat	DRD Boardroom	11 Apr 2013 @ 15:59	
28 Mar 2013 @ 11:15	Oudo Support		01314840032	Derrop Pflighter	DRD Boardroom	11 Apr 2013 @ 15:59	
28 Mar 2013 @ 11:24	Oudo Support Overflow		01140000000	012100000000			135
20 May 2012 @ 17:06	Oude Current Ouerflaur		of the local division in the local divisione	ACCOUNT OF A DATE OF A DAT			-

## 6.10.2 Assigning Abandoned Caller ID's to Agents

Right click (or Shift right click for multiple) the abandoned call and then right click to assign to Agents.



andonea cano		- 2	¥	(ca)
Number	Name	Assigned To	Assigned Date	
03300022016 Privata	Paul Warburton Private Ten Pagentt	Agent P 335 Agent P 335	30 Apr 2013 @ 15:43 30 Apr 2013 @ 15:43	
April 1261302 Private	Jo Phone Minate	Call number		
175306666222	Levis Langley (Mobile)	Assign for callbac	k 🕨	Steve Tutt
12086483000	Error Prennet	Unassign		Lewis Langley
12086-483000	Jamas Missine	Mark as processed	I	Alastair Brown

Note: This capability requires Nextiva Unity Supervisor Enterprise, Nextiva Unity Wallboard and Nextiva Unity Agent Enterprise.

## 6.11 Running Reports

Nextiva Unity Supervisor provides access to the real-time and historical reports provided by the NCC reporting server. The information in these reports is entirely produced by NCC. To access these reports, click Tools > Call Center > Report Viewer.

Custom directory	+		
Call centers	•	Report Viewer	

From the Report Viewer interface, select the desired report in the "Template" drop down list.



Unity Report Viewer			
Template	Abandoned Call Report		•
Start Period	Mon, 24 Jun	-	00:00
End Period	Mon, 24 Jun	•	15:45
	🗹 Real-time report		
Sampling	Daily		-
Filter Type	Call center		-
Filter(s)	<ul> <li>All call centers</li> <li>Qudo Support Overflov</li> <li>Qudo Sales</li> <li>✓ VanillaIP Support Over</li> <li>✓ VanillaIP Sales</li> <li>Qudo Support</li> <li>✓ VanillaIP Support</li> </ul>	/ flow	
Abandoned call threshold	15		
Service level	15		
			∢ يو

## 6.12 Adding Agents to Monitored Agents List

By default, Nextiva Unity Supervisor will take the list of supervised agents from NCC. To monitor a specific subset of the total Agents, go to Settings [button] > Settings [tab] > Supervisor and uncheck "Automatically add all agents top my supervised agent list," then restart Nextiva Unity.



Now right click the call center queue in Personal Wallboard, select "Modify supervised agent list" and add the Agents you want to supervise.





## 6.13 Supervised Agents in Staffed Ratio Statistic

The Supervisor can optionally configure the "Staffed Ratio" statistic so that it only shows Agents that are being supervised as indicated in point 6.12 above. In Settings [button] > Settings [tab] > Supervisor, check "Only included my supervised agents in the staffed ratio." This means that even if there are hundreds of other agents available in the queue, the Supervisor will only see how many of the agents they supervise are available in each queue through the staffed ratio statistic.

Automatically add all agents to my supervised agent list.

Only include my supervised agents in the staffed ratio

Show queued calls in my current call list.

#### Nextiva Unity Wallboard User Guide

7.1 Wallboard Main Interface



Unity Wallboard					C 0 - X
Tech Queues Wallboard Name		Statist	ics to Display		
Queue	Calls In Queue	Longest Wait	Answered Calls	Missed Calls	Average Wait Time
Nuts Sales	0	0:00	0	0	0:00
Bolts Sales	0	0:00	0	0	0:00
Qudo Sales	0	0:00	0	0	0:00
Qudo Sales Overflow	Highlight Non-Zero Values [in red]	0:00	Thresholds	0	0:00
VanillalP Sales	1	0:06	3	9	0:05
Vanillaip Sales Overflow	0	0:00	0	0	0:00

Nextiva Unity Wallboard is highly customizable to accommodate different size screens, different font sizes and different customer requirements for stats and queues to be displayed. By default, Wallboard will resize full screen to the dimensions of the host machine.

## 7.2 Statistics Refresh Timer

Wallboard is designed to display real-time, daily statistics. All statistics are from midnight the previous day and are automatically reset by Nextiva.

If the Client Call Control service is assigned to the queue in NCC, then the "Calls in Queue" stat will be a realtime stat. All other stats are polled from NCC on a default 900-second timer. The timer can optionally be configured to a minimum level specified by Nextiva with the minimum permitted duration being 60 seconds.

#### 7.3 Licensing

Nextiva Unity Wallboard licences against the MAC address of the network adaptor of the host computer. To see which MAC is currently licensed, click About Nextiva Unity Wallboard in Settings.





## 7.4 Available Statistics

The following statistics are available;

Statistic	Description
Calls In Queue	Provides a count of calls currently in queue
Longest Wait Time	Wait time, in seconds, of the longest waiting caller into the queue
Average Wait Time	Average wait time, in seconds, for all calls that have been answered
Missed Calls	Abandoned calls
Received Calls	Total calls that were delivered to the queue
Answered Calls	Total calls that were answered by an Agent
Staffed Ratio	The number of Agents available to take calls (Joined to the queue and in
	Available state) against the total number of Agents assigned to the queue in
	NCC

## 7.5 Accessing Wallboard Settings

To enter call center queue IDs and change settings, right click the very top bar in Wallboard > Nextiva Unity Wallboard Settings





## 7.6 Configuration Options

After changing settings, select the green box to update the settings.

## 7.6.1 Adding Call Center Queues

Configure in: Settings > Authentication

Click the green + and add the call center ID and password from NCC. Click the red – to remove calls centers.

U Services & Settings		3
Settings		
Unity Settings Unity Settings Startup Sscutty Connection Network Proxy Authentication Cal Center Wallboard Columns Display Statistics	Specify call center authentication details. All login ids and passwords are case sensitive and each login id mus include the domain. Statistics will be displayed in the order listed. Call Centers Nuts Sales Bobts Sales Qudo Sales Qudo Sales Qudo Sales Qudo Sales Overflow Vanillap Sales Overflow	t
	Alert me when a call center login fails	
	<b>\$2</b> 🗸	P

## 7.6.2 Changing Queue Display Order

Configure in: Settings > Authentication

Click the call center and switch position up or down with the green arrows on the right.



Services & Settings Settings	Constitute of antipopulation data in All Insis ide
Unity Settings – Update – Statup – Saturby – Security Connection – Proxy – Proxy – Anthenication – Call Center Walboard – Call Center Walboard – Colums – Display – Statistics	Specify call center authentication details. All loginid must include the domain. Statistics will be displayed in the order inited. Call Centers Nuts Sales Bobs Sales Quido Sales Sales Quido Sales Sales Quido Sales Sales Sales Sales S

## 7.6.3 Adding and Removing Statistics

Configure in: Settings > Columns

Click the green +, then the "Statistic to display" drop down list will display available statistics that are not already selected. Select a statistic and then the red – to remove it from Wallboard.

U Services & Settings				
Settings	Settings       Unity Settings       - Update       - Statistics   Specify the columns call center name is call center name		s to include in the statistics list. always the first column in the lis	
			Statistic to display	<b>•</b>
			Column heading	Received Calls Staffed Ratio
			Alignment	Center
				Highlight non-zero values
				□ Set threshold alert value

## 7.6.4 Changing Statistics Order

Configure in: Settings > Columns

Click the call center to highlight it, and then use the green arrows on the right to change the order.





## 7.6.5 Renaming Statistics Headings

Configure in: Settings > Columns

Double click the call center in the Columns list to open the configuration page for the queue. Statistics can be renamed in the "Column Heading" field. In the example below, the "Answered Calls" stat has been renamed "Sales Hits."

Statistic to display	Answered Calls	
Column heading	Sales Hits	
Alignment	Center	
	Highlight non-zero values	
	☑ Set threshold alert value	
	to 1 calls	

Sales Hits Calls In Queue	4
Longest Wait	
Average Wait Time	1
	2

Unity Wallboard	uno Alab -	the second and	and address and
Tech Queues			
Queue	Sales Hits	Calls In Queue	Longest Wait
Nuts Sales	0	0	0:00

## 7.6.6 Changing Statistics Alignment

Configure in: Settings > Columns

Double click the call center in the Columns list to open the configuration page for the queue. Choose Left,

Center or Right from the "Alignment" drop down list.



Statistic to display	Answered Calls
Column heading	Sales Hits
Alignment	Center  Left Center Right Set unesnou arent value to 1 calls

## 7.6.7 Highlight Non-Zero Values

Configure in: Settings > Columns

Double click the call center in the Columns list to open the configuration page for the queue. Checking the "Highlight non-zero values" box will highlight any stat greater than zero in red.



## 7.6.8 Setting Thresholds

Thresholds are a way of visually showing that a pre-set normal behaviour has been breached. Thresholds are set against a statistic, and when the threshold is breached, Wallboard displays the stat in a black box. Configure in: Settings > Columns



Double click the call center in the Columns list to open the configuration page for the queue. Checking the "Highlight non-zero values" box will highlight any stat that is greater than zero in red.

Statistic to display Column heading	Missed Calls Missed Calls	•	
Alignment	Center ☑ Highlight non-zero values ☑ Set threshold alert value to 3 calls	Calls In Queue	Missed Calls
	1	0	3
	0	0	1

## 7.6.9 Changing Font, Gridlines and Logo

Configure in: Settings > Display

Change the display properties of Wallboard, including the head name and the logo.

Logo path:		÷
Heading text:	Tech Queues	
Font size:	28	•
Show gridlines:	Both	•

Unity Wallboard	
Tech Queues	
Queue	

## 7.6.10 Configuring Scrolling Queues

Configure in: Settings > Display



To enable queue scrolling, uncheck the "Show all queues at once" box. The scrolling options below will now become configurable. Loop queues will mean that Nextiva Unity will always display a full list of queues in the Wallboard.



## 7.6.11 Forced Queue Display

Configure in: Settings > Authentication

Where scrolling queues are being used, it is possible to always display one or more queues. Double click the queue in Authentication and click "Always show these statistics." When the queues scroll, this call center will always be shown. When more than one call center is to be shown, their order can be set in Changing Queue Display Order above.



