



Nextiva Unity Agent

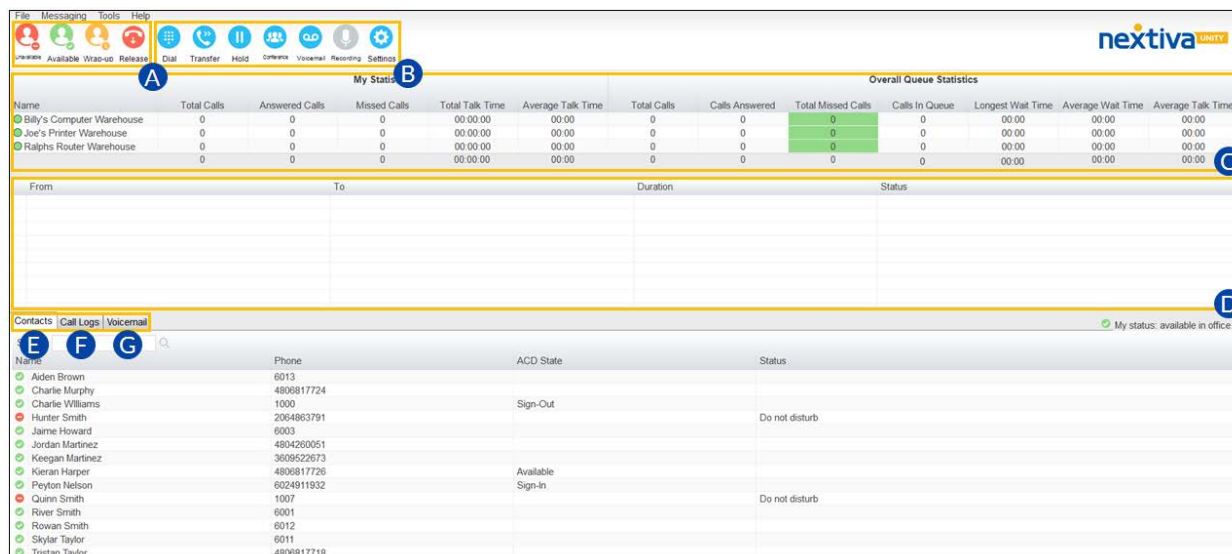
VERSION 1.5

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Nextiva Unity Agent

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



Nextiva Unity Agent Interface

- A. **ACD State Buttons:** Users update their availability in the Call Center queue (Unavailable, Available, and Wrap-up).

NOTE: This feature requires a Nextiva Call Center license, and the User must be assigned to a queue.

- B. **Call Control Buttons:** Provide quick access to common phone features such as Dial, Transfer, Hold, Conference, Voicemail, Recording, Reports, Settings, etc.

NOTE: Only features assigned to the User will be displayed. For example, if Call Recording is not assigned to the User, the option will not be displayed.

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

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

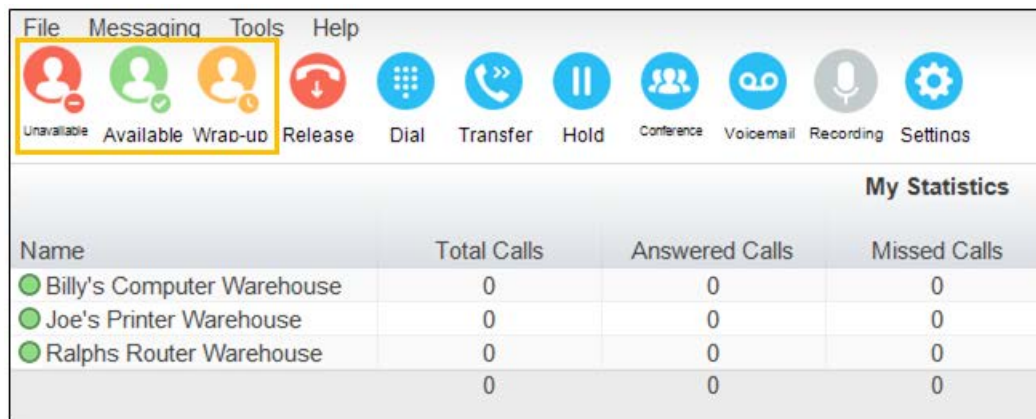
- D. **Active Call Window:** Provides a list of all active calls and the current status (Ringling, Active, or On-Hold), including the total duration of the call.

- E. **Contacts:** Display up to 50 Users, including their phone number/extension, current status, and ACD state.

- F. **Call Logs:** View all **Missed calls**, **Received calls**, and **Dialed calls**.
- G. **Voicemail:** Listen and manage voicemail. Right-click any voice message to **Play**, **Save**, **Delete**, **Call**, or **Copy number**.

Changing ACD State

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



ACD State Buttons

The default Agent Availability Codes include:

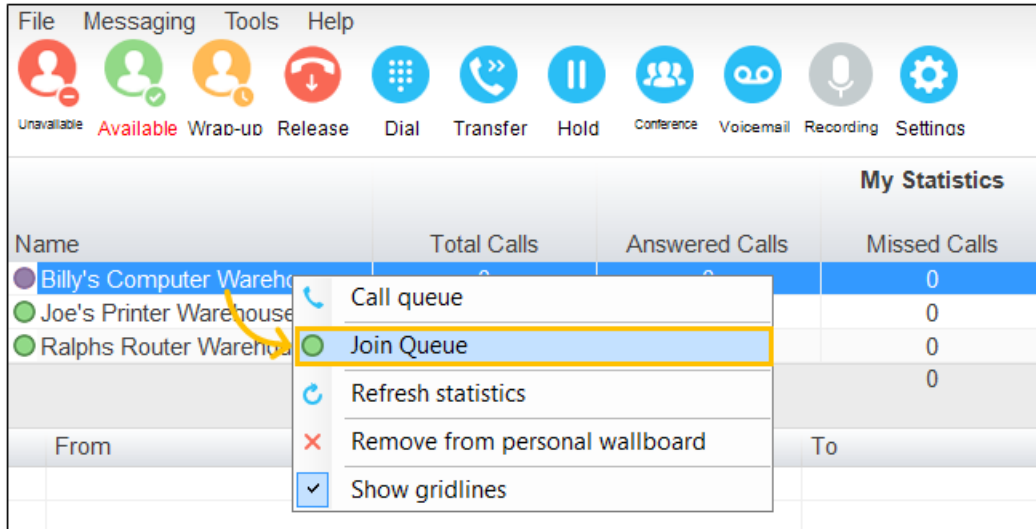
- **Available:** Available to take inbound calls from the assigned caller center queue(s).
- **Unavailable:** Unavailable to take inbound calls from the assigned Call Center queue(s), including the unavailable reason code if applicable (e.g. break, restroom, etc.).
- **Wrap-Up:** Agent is in a Wrap-up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

Joining and Leaving Call Center Queues

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

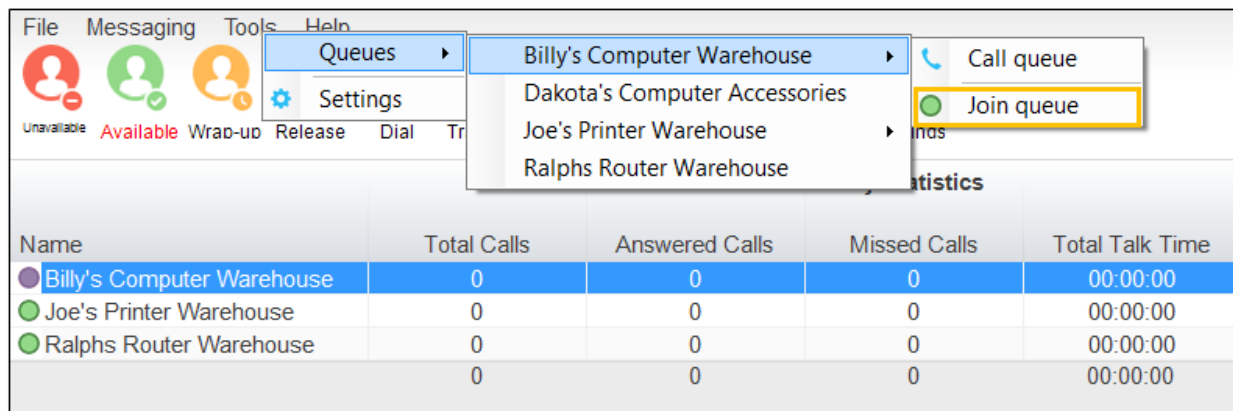
Joining Queues:

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



Join Queue from the Personal Wallboard

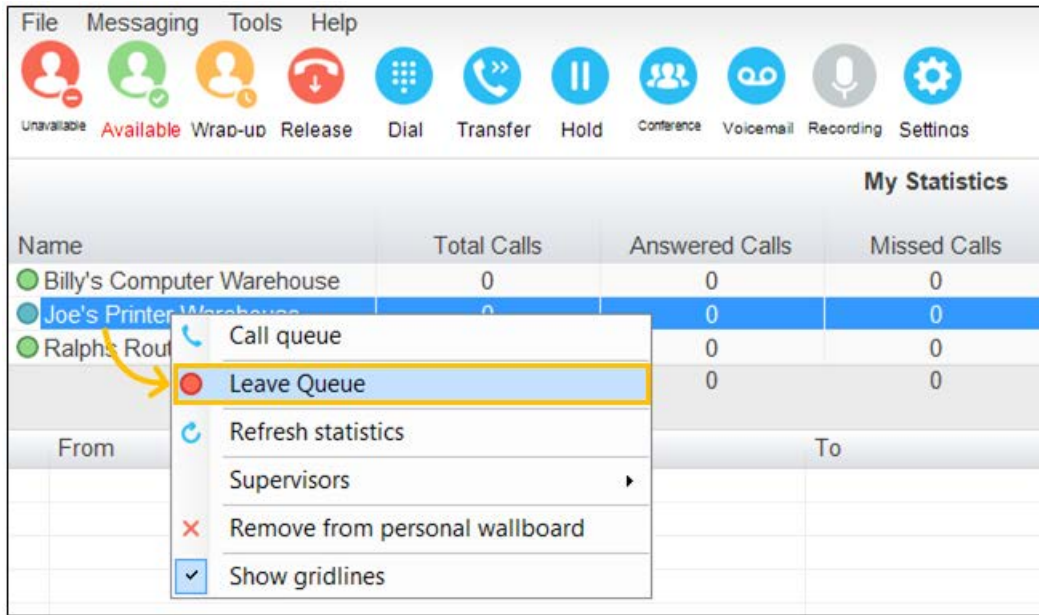
Users can also click **Tools > Queues > Call Center Queue > Join Queue**.



Join Queue from the Tools Menu

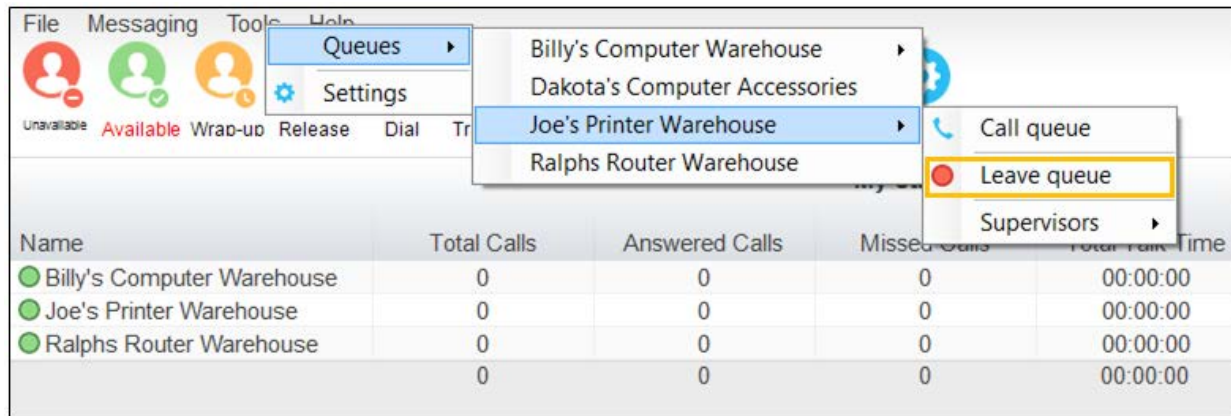
Leaving Queues:

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




Leave Queue from the Personal Wallboard

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




Leave Queue from the Tools Menu

Answering an Inbound Call

When Unity displays an incoming call, click the **Answer**  button or double-click the **Active Call Window** to answer the call. The primary device will automatically answer once the call is answered in Unity.

During an active call, click the new inbound call in the **Active Call List**. Then click **Answer**. The active call will automatically be placed on hold.


Ending an Active Call

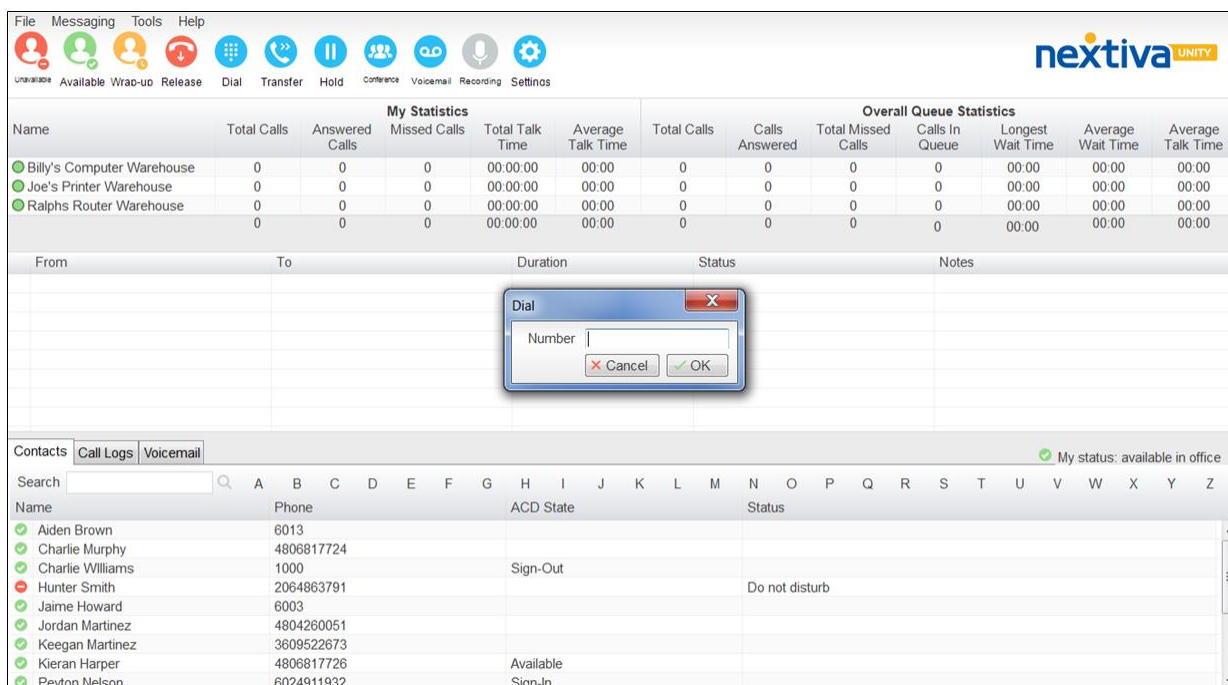
Click the **Release**  button to end the current active call. If multiple calls are in the **Active Call List**, make sure to select the call to end before clicking **Release**.

Making an Outbound Call

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

Making an Outbound Call Using the Dial Window:

Click the **Dial**  button and enter the phone number in the **Number** field. Click **Enter** or **Ok** to initiate the call.



The screenshot displays the Nextiva Unity interface. At the top, there is a navigation bar with icons for File, Messaging, Tools, and Help, along with status indicators for Available, Wrap-up, Release, Dial, Transfer, Hold, Conference, Voicemail, Recording, and Settings. The main area is divided into two tables: "My Statistics" and "Overall Queue Statistics".

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
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

Below the statistics is a call log table with columns: From, To, Duration, Status, Notes. A "Dial" dialog box is overlaid on this table, featuring a "Number" input field, a "Cancel" button, and an "OK" button.

At the bottom, the "Contacts" panel is visible, showing a search bar and a list of contacts with columns for Name, Phone, ACD State, and Status.

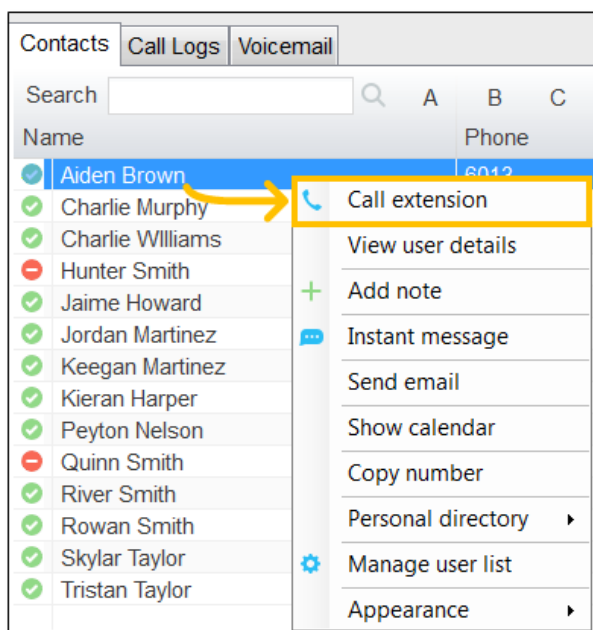
Name	Phone	ACD State	Status
Aiden Brown	6013		
Charlie Murphy	4806817724		
Charlie Williams	1000	Sign-Out	
Hunter Smith	2064863791		Do not disturb
Jaime Howard	6003		
Jordan Martinez	4804260051		
Keegan Martinez	3609522673		
Kieran Harper	4806817726	Available	
Peyton Nelson	6024911932	Sign-In	

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 in the **Active Call Window**.

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

Making an Outbound Call Using Clipboard:

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

Sending an Inbound Call to Voicemail

To send an inbound call directly to voicemail, click the **Voicemail**  button.


Transferring a Call

There are two options for transferring a call:

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

Warm Transferring

Warm Transfer Using the Transfer Button:


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

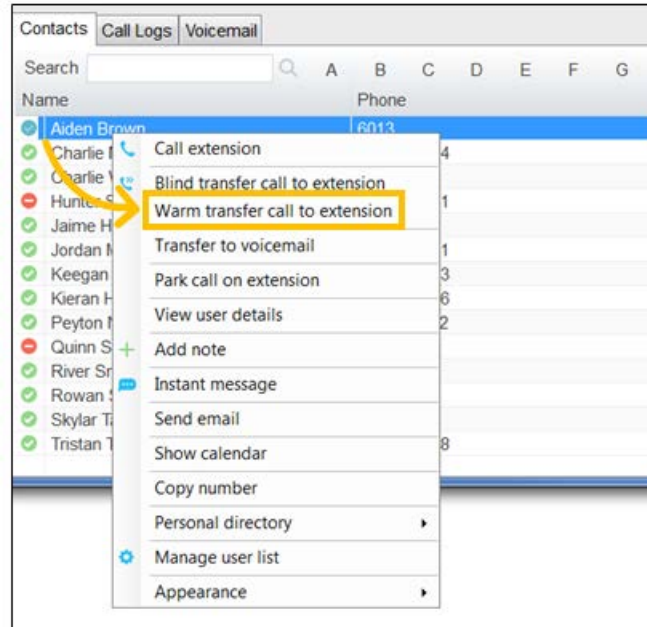
Warm Transfer Using Drag-and-Drop:

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

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

Warm Transfer Using Right-Click:

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



Warm Transfer to Contact Using Right-Click

Blind Transferring

Blind Transfer Using the Transfer Button:

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

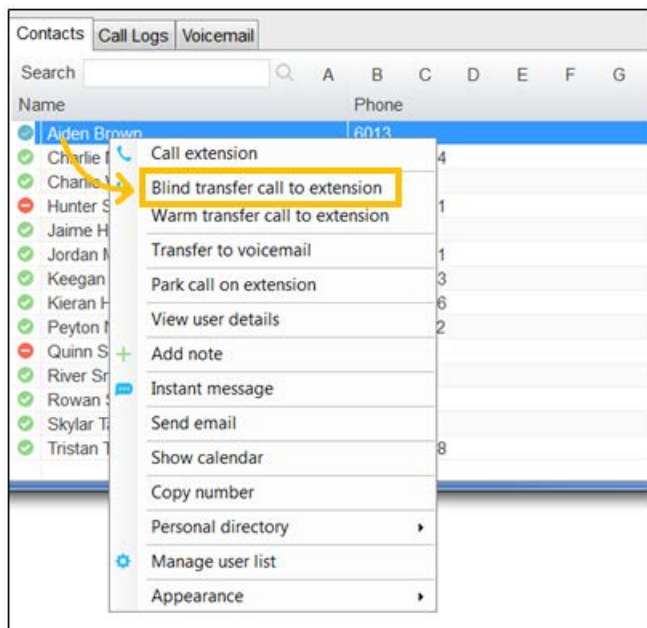
Blind Transfer Using Drag-and-Drop:

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

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

Blind Transfer Using Right-Click:

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



Blind Transfer Using Right-Click


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
Barry Simpson	Chris Tutt	00:18	Call parked for Andrew Smith	Previously transferred to Andrew Smith

Incoming Call Notes

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.

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

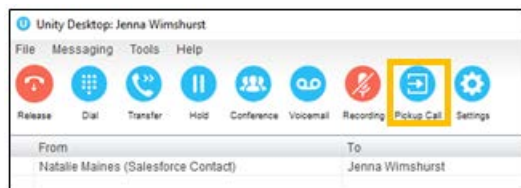
Call Parked on Extension

To Park a Call on Extension:

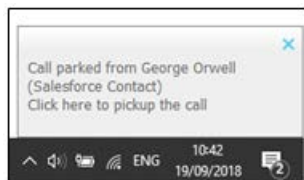
1. Select the call in the **Active Call Window** (if multiple calls are present).
2. Right-click the User in the **Contacts** list, and select **Park call on extension**.

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 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**.

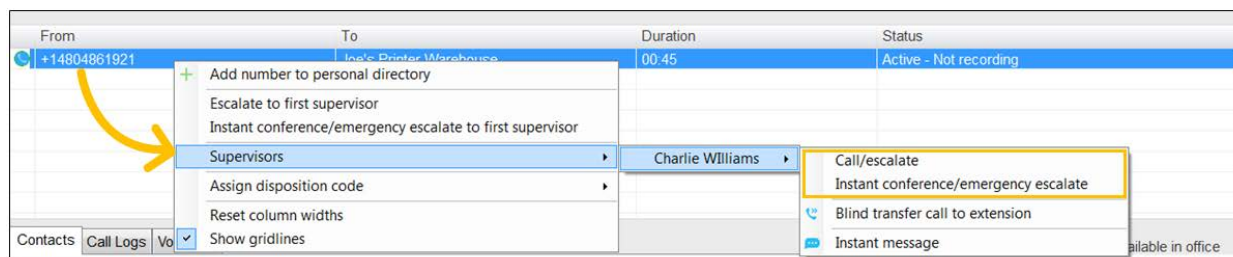
Escalating a Call to a Supervisor

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).



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).

Name	My Statistics				Overall Queue Statistics					
	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 Warehouse	0	0	0	00:00:00	00:00	0	0	0	0	00:00
Joe's Printer Wa	1	1	0	01:04	01:09	1	1	0	0	00:00
Ralph's Router V	0	0	0	00:00	00:00	0	0	0	0	00:00
	1	1	0	01:04	00:23	1	1	0	0	00:00
From +14804861921						Duration	Status			
						00:19	Active - Not recording			

Call queue	
Transfer call to queue	
Leave Queue	
Refresh statistics	
Escalate to first supervisor	
Instant conference/emergency escalate to first supervisor	
Supervisors	Charlie Williams
Remove from personal wallboard	
Show gridlines	

Call/escalate
Instant conference/emergency escalate
Blind transfer call to extension
Instant message

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.

Starting a Conference Call

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

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

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

Call Recording


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

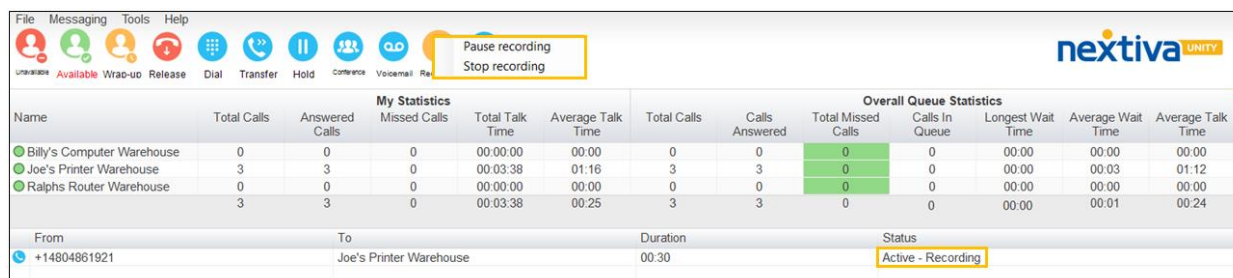
Changing Call Recording Options

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

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

Controlling Call Recording

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



The screenshot shows the Nextiva Unity interface. At the top, there is a menu bar with 'File', 'Messaging', 'Tools', and 'Help'. Below the menu bar are several icons for call control functions: Available, Wtap-up, Release, Dial, Transfer, Hold, Conference, Voicemail, and Record. The Record icon is highlighted with a yellow box, and a context menu is open over it with options 'Pause recording' and 'Stop recording', also highlighted with a yellow box. Below the icons is a table with two sections: 'My Statistics' and 'Overall Queue Statistics'. The 'My Statistics' table has columns for Name, Total Calls, Answered Calls, Missed Calls, Total Talk Time, and Average Talk Time. The 'Overall Queue Statistics' table has columns for Total Calls, Calls Answered, Total Missed Calls, Calls In Queue, Longest Wait Time, Average Wait Time, and Average Talk Time. Below the statistics tables is a call log table with columns for From, To, Duration, and Status. The status 'Active - Recording' is highlighted with a yellow box.

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
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	To	Duration	Status
+14804861921	Joe's Printer Warehouse	00:30	Active - Recording

Call Recording Status

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**.

The screenshot displays the Nextiva Personal Wallboard interface. At the top, there is a navigation bar with icons for various functions: Unavailable, Available, Wrap-up, Release, Dial, Transfer, Hold, Conference, Voicemail, Recording, Reports, and Settings. Below this is a 'My Statistics' table with columns for Name, Total Calls, Answered Calls, Missed Calls, Total Talk Time, Average Talk Time, and another Total Calls column. A context menu is open over the 'Agents' section, showing a list of agents: Carla Smith, Mark Smith, Matthew Smith, Max Sharpman, Paul Smith, Sally Smith, and Vanna White. A sub-menu is open for Mark Smith, listing actions such as Join Queue, Leave Queue, Sign In, Available (checked), Unavailable, Wrap-Up, Sign-Out, Silent monitor, Call extension, and Instant message (highlighted with a yellow box). At the bottom, there is a 'Contacts' section with tabs for Call Logs, Voicemail, and Agent Activity, and a table listing contacts with their names and phone numbers.

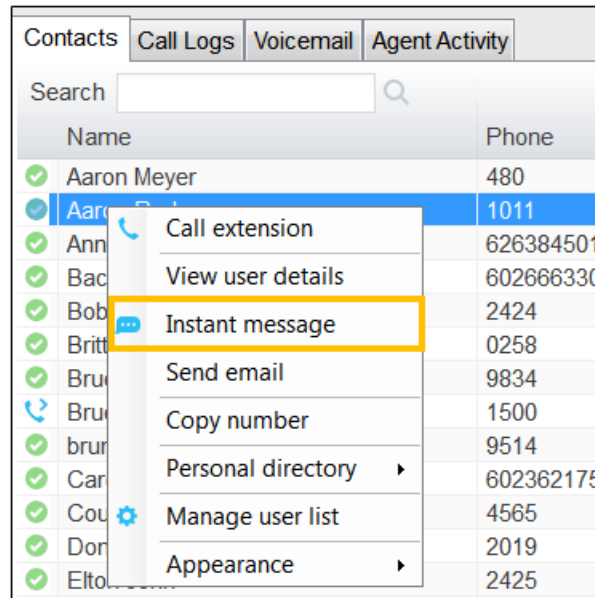
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls
Amazing Call	0	0	0	00:00:00	00:00	0
Inside Sales	0	0	0	00:00:00	00:00	0

Name	Phone	ACD
✓ Aaron Meyer	480	
✓ Aaron Rodgers	1011	
✓ Annie Ceaders	6263845019	
✓ Back House	6026663301	
✓ Bob Smith	2424	

Sending an Instant Message via Personal Wallboard

Sending Instant Messages Using the Contacts Tab:

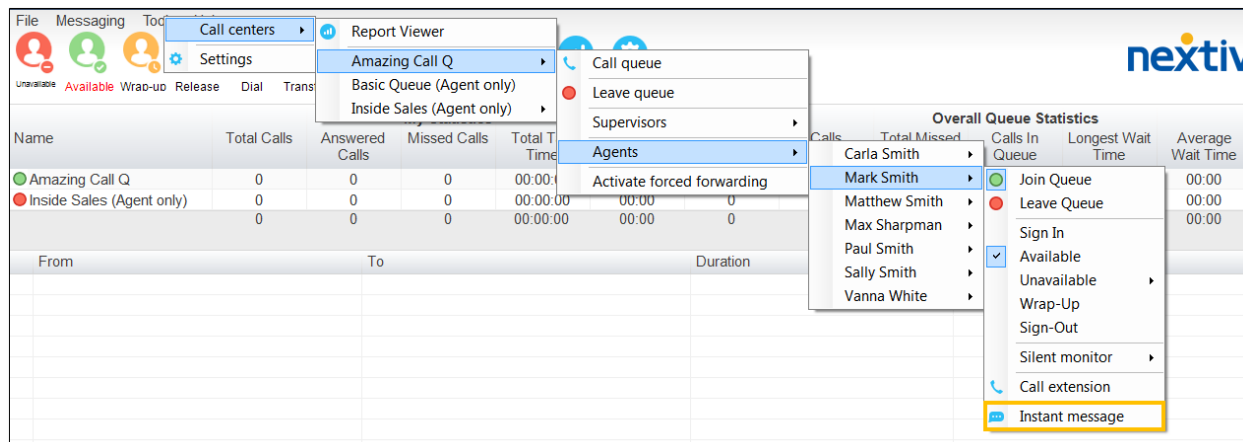
1. Click the **Contacts** tab.
2. Right-click on the **Contact** and select **Instant message**.



Sending an Instant Message via Contacts Tab

Sending Instant Messages Using the Tools Menu:

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



Sending an Instant Message via Tools Menu

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