



Nextiva Unity Supervisor

VERSION 1.4

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Nextiva Unity Supervisor

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

The screenshot displays the Nextiva Unity Supervisor interface. At the top, there is a navigation bar with icons for File, Messaging, Tools, and Help. Below this is a toolbar with buttons for Available, Wrap-up, Release, Dial, Transfer, Hold, Conference, Voicemail, Recording, Reports, and Settings. The main area is divided into several sections:

- My Statistics:** A table showing performance metrics for three call centers: Billy's Computer Warehouse, Joe's Printer Warehouse, and Ralphs Router Warehouse (Agent only). Metrics include Total Calls, Answered Calls, Missed Calls, Total Talk Time, and Average Talk Time.
- Overall Queue Statistics:** A table showing queue performance metrics for the same three call centers, including Total Missed Calls, Calls In Queue, Longest Wait Time, Average Wait Time, and Average Talk Time.
- Active Call Window:** A table with columns for From, To, Duration, and Status, currently empty.
- Agent Activity:** A table showing the status of various agents, including Name, Phone, ACD State, and Status.

Annotations A, B, C, and D are placed on the interface to highlight specific features: A points to the ACD State buttons, B points to the Call Control buttons, C points to the Personal Wallboard tables, and D points to the Agent Activity table.

Nextiva Unity Supervisor Interface

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

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

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

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

- C. **Personal Wallboard:** View performance metrics for the Call Center(s) the Supervisor is assigned to. Metrics are broken down by **My Statistics**, which shows the User's individual performance metrics, and **Overall Queue Statistics**, which detail the current metrics across all Call Centers.
- D. **Active Call Window:** Provides a list of all active calls and their current status (Ringing, Active, or On-Hold), including the total duration of each call.

- E. **Contacts:** Displays up to 50 Users, including their phone number/extension, current status, and ACD state.
- F. **Call Logs:** View all **Missed calls**, **Received calls**, and **Dialed calls**.
- G. **Voicemail:** Listen and manage voicemail. Right-click any voice message to **Play**, **Save**, **Delete**, **Call**, or **Copy number**.
- H. **Agent Activity:** View and manage all Agents, or those for a specific queue. Make Agents “Available,” or move them in and out of queues as required.

Changing Agent ACD State

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

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

From the Personal Wallboard:

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

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

Agent Status - Personal Wallboard

From the Agent Activity Tab:

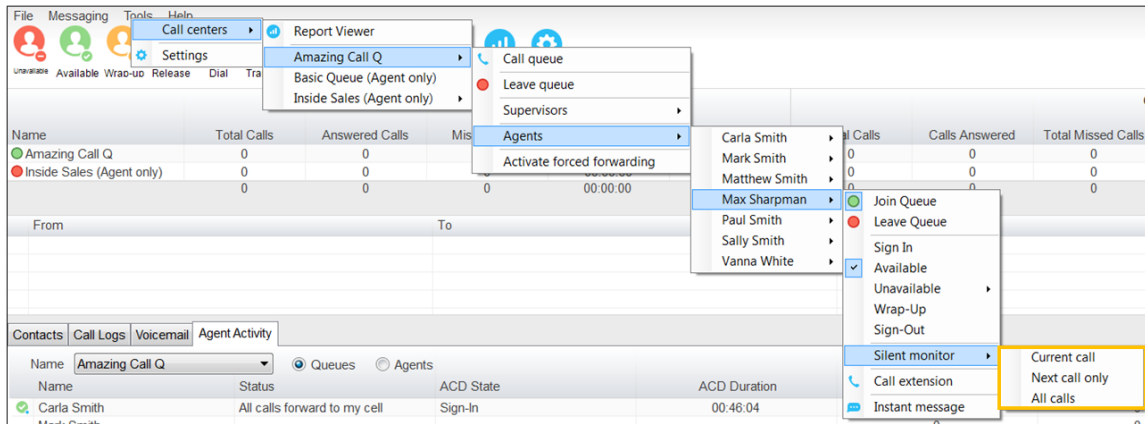
1. Click the **Agent Activity** tab, then select a Call Center from the **Name** drop-down menu.
2. Right-click on the **Agent** and select the Agent availability.

Name	Status
Dakota Williams	
Kieran Harper	
Peyton Nelson	

Agent Status - Agent Activity Tab

From the Tools Menu:

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



Agent Status - Tools Menu

Silent Monitoring

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

Silent Monitor From the Personal Wallboard:

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

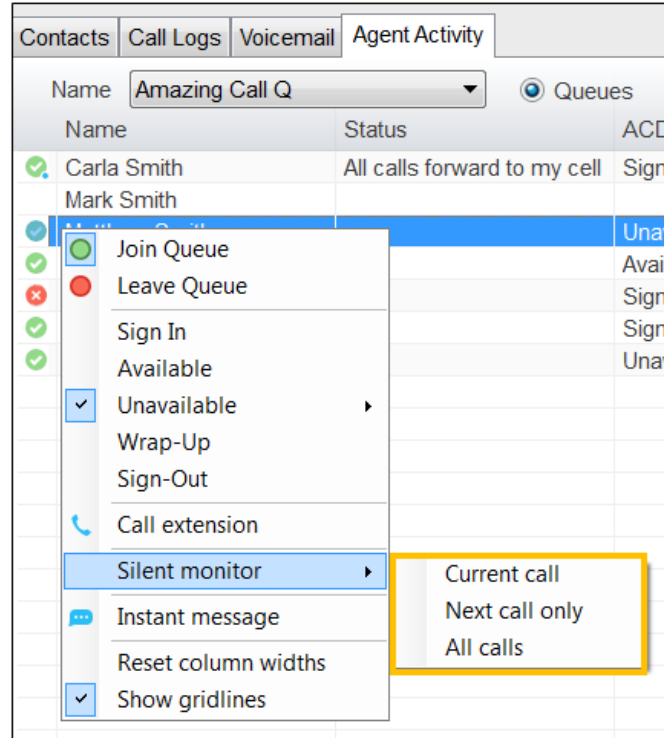
The screenshot displays the Nextiva interface with the 'My Statistics' table and the 'Agents' menu. The 'Agents' menu is open, showing a list of agents including Max Sharpman. The 'Silent monitor' option is selected, and a sub-menu is open showing 'Current call', 'Next call only', and 'All calls'.

Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Ca Answ
Amazing Call C	0	0	0	00:00:00	00:00	0	0
Inside	0	0	0	00:00:00	00:00	0	0

Silent Monitor – Personal Wallboard

Silent Monitor From the Agent Activity Tab:

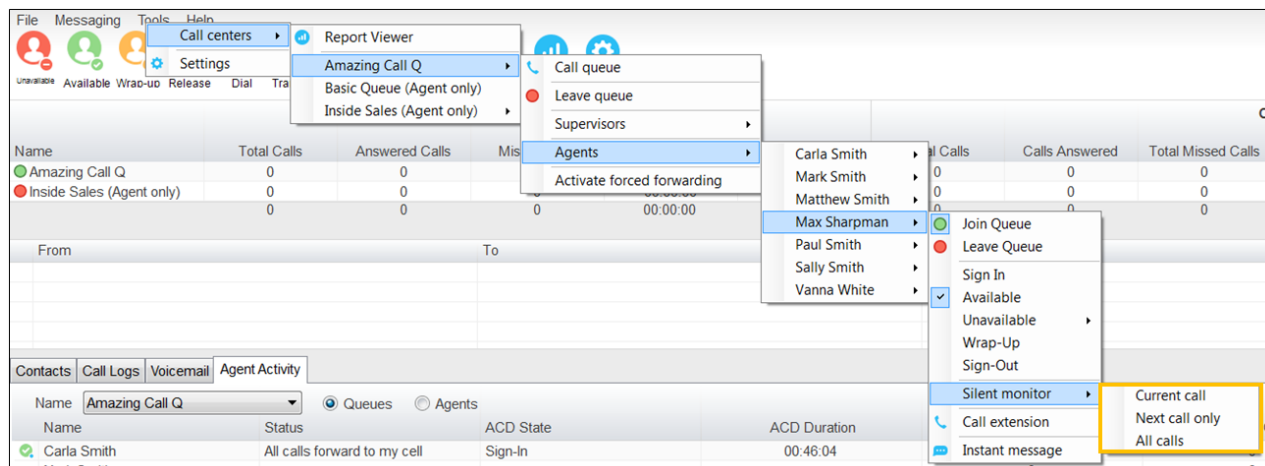
1. Click the **Agent Activity** tab, then select a Call Center from the **Name** drop-down menu.
2. Right-click on the **Agent** and select **Silent Monitor > Current call, Next call only, or All calls**.



Silent Monitor – Agent Activity Tab


Silent Monitor From the Tools Menu:

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




Silent Monitor – 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 drag-and-drop the contact into the **Active Call Window**. The User's primary phone will ring once the call is initiated. Pick up the handset to establish the outbound call.

Making an Outbound Call Using the Dial Window:

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

The screenshot displays the Nextiva Unity interface. At the top, there is a menu bar with 'File', 'Messaging', 'Tools', and 'Help'. Below the menu is a toolbar with icons for 'Available', 'Wrap-up', 'Release', 'Dial', 'Transfer', 'Hold', 'Conference', 'Voicemail', 'Recording', and 'Settings'. The main area is divided into two sections: 'My Statistics' and 'Overall Queue Statistics'. 'My Statistics' shows call data for three warehouses: Billy's Computer Warehouse, Joe's Printer Warehouse, and Ralphs Router Warehouse. 'Overall Queue Statistics' shows a summary of call metrics. Below these sections is a table with columns for 'From', 'To', 'Duration', 'Status', and 'Notes'. A 'Dial' window is overlaid on the table, containing a 'Number' input field and 'Cancel' and 'OK' buttons. At the bottom, there is a 'Contacts' panel with a search bar and a list of contacts with their names, phone numbers, ACD states, and statuses.

Dial Window

Making an Outbound Call Using the Contacts Panel:

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

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

The screenshot shows the 'Contacts' panel in the Nextiva interface. The panel has tabs for 'Contacts', 'Call Logs', and 'Voicemail'. A search bar is at the top. Below it is a list of contacts with columns for 'Name' and 'Phone'. The contact 'Aiden Brown' is selected, and a context menu is open over his name. The menu items are: 'Call extension' (highlighted with a yellow box and an arrow), 'View user details', 'Add note', 'Instant message', 'Send email', 'Show calendar', 'Copy number', 'Personal directory', 'Manage user list', and 'Appearance'.

Call Extension

Making an Outbound Call Using Drag-and-Drop:

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

Making an Outbound Call Using Clipboard:

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

Sending an Inbound Call to Voicemail

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


Transferring a Call

There are two options for transferring a call:


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

Warm Transferring


Warm Transfer Using the Transfer Button:

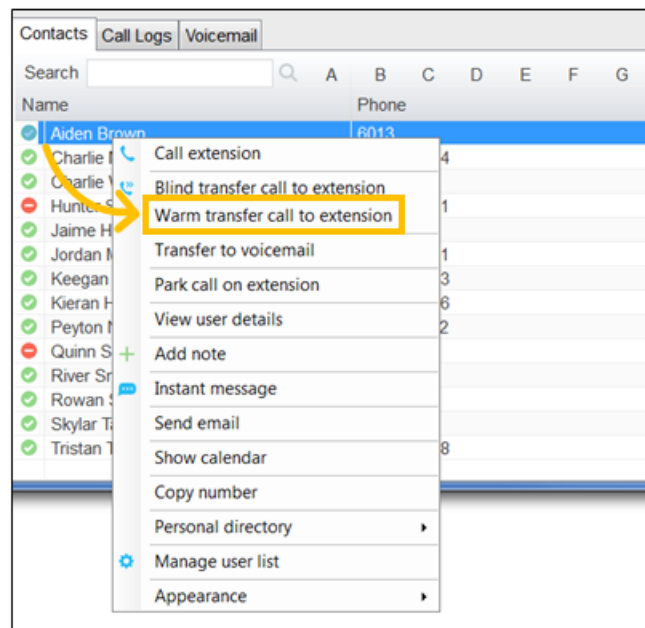
While on an active call, initiate a second call to the receiving party. Doing so will automatically place the first call on hold. When the receiving party is ready to take the transfer, click the **Transfer**  button. Select **Transfer calls together**.

Warm Transfer Using Drag-and-Drop:

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

Warm Transfer Using Right-Click:

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



Warm Transfer to Contact Using Right-Click

Blind Transferring

Blind Transfer Using the Transfer Button:

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

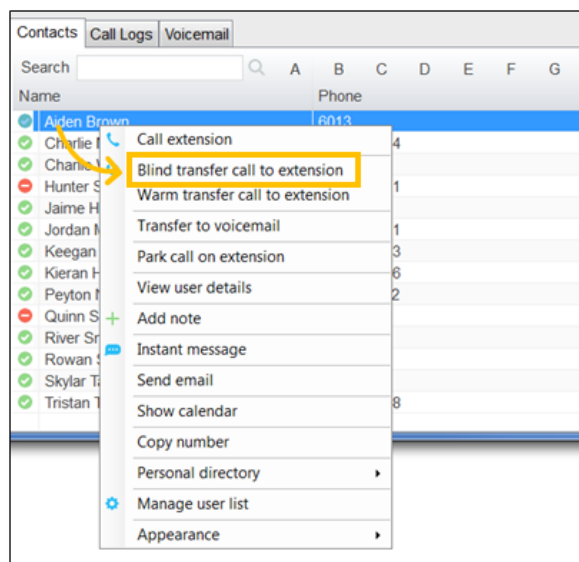
Blind Transfer Using Drag-and-Drop:

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

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

Blind Transfer Using Right-Click:

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



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

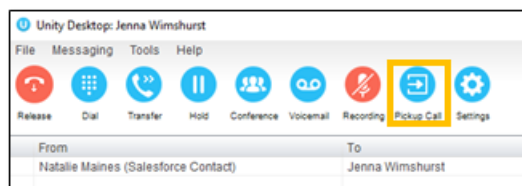
Call Parked on Extension

To Park a Call on Extension:

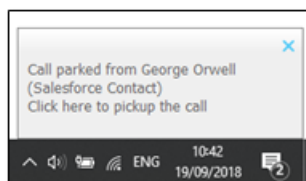
1. Select the call in the **Active Call Window** (if multiple calls are present).
2. Right-click the User in the **Contacts** list, and select **Park call on extension**.

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**.

Starting a Conference Call

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

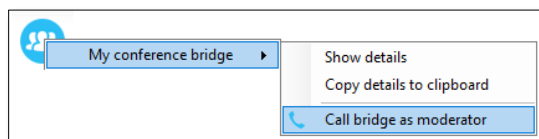
NOTE: Users can also double-click on any contact under the **Contacts** tab or call listed under the **Call Logs** tab to join the conference call.

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

Conference Bridge Integration

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

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



Conference Bridge Integration

Call Recording


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

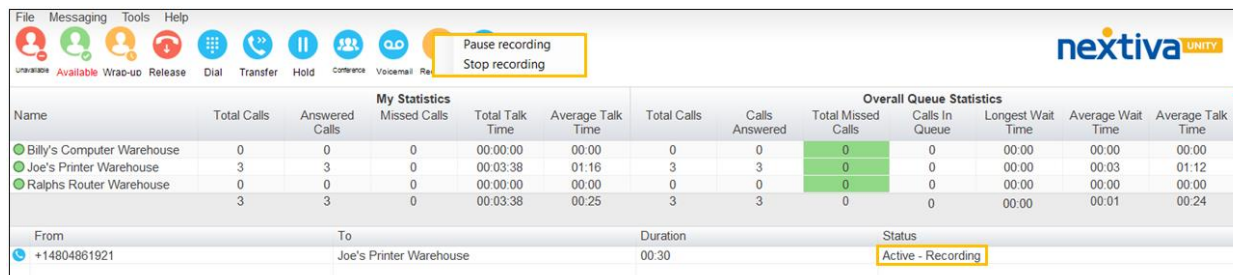
Changing Call Recording Options

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

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

Controlling Call Recording

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



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: Available, Wrap-up, Release, Dial, Transfer, Hold, Conference, and Voicemail. A 'Recording' icon is highlighted with a yellow box, and a dropdown menu is open showing 'Pause recording' and 'Stop recording' options, also highlighted with a yellow box. Below the icons is a table with two main 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 these tables is a 'Call Recording Status' table with columns for From, To, Duration, and Status. The status for the call from +14804861921 to Joe's Printer Warehouse is 'Active - Recording', which 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 menu bar with 'File', 'Messaging', 'Tools', and 'Help'. Below this is a row of status and action icons: Unavailable, Available, Wrap-up, Release, Dial, Transfer, Hold, Conference, Voicemail, Recording, Reports, and Settings. The main area is divided into sections. On the left, there are call status indicators for 'Amazing Call' and 'Inside Sales'. Below these is a 'From' field. The central part of the screen features 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: 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' tab with sub-tabs for 'Call Logs', 'Voicemail', and 'Agent Activity'. A search bar is present above a table of contacts with columns for Name and Phone. The contacts listed are Aaron Meyer (480), Aaron Rodgers (1011), Annie Ceaders (6263845019), Back House (6026663301), and Bob Smith (2424).

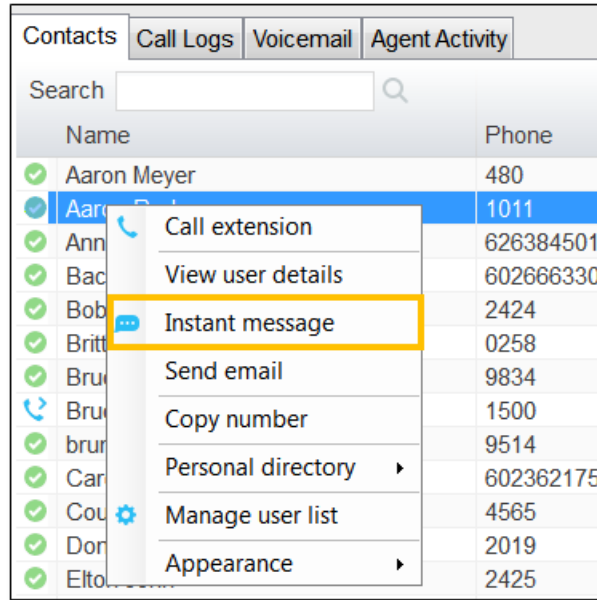
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls
Amazing Call	0	0	0	00:00:00	00:00	0
Inside Sales	0	0	0	00:00:00	00:00	0

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:

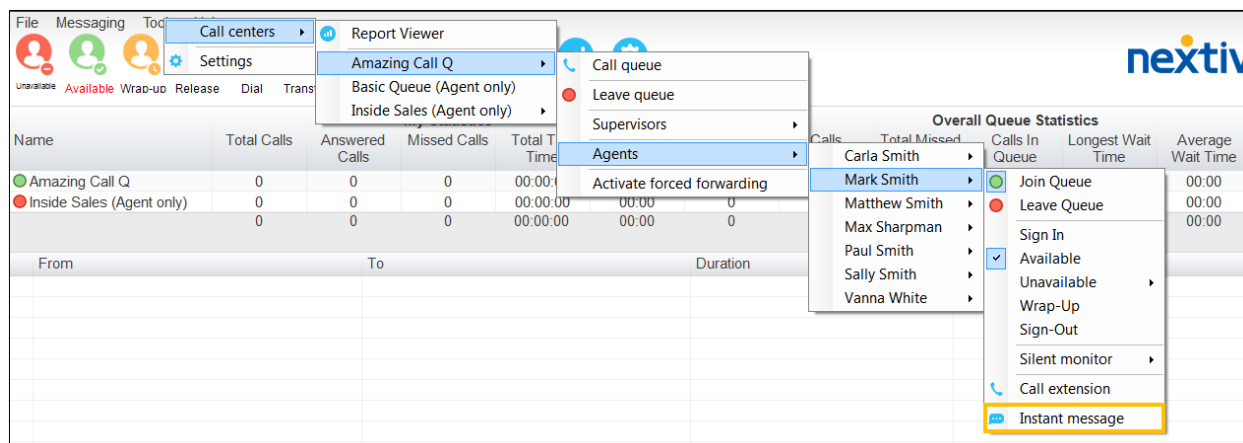
1. Click the **Contacts** tab.
2. Right-click on the **Contact** and select **Instant message**.



Sending an Instant Message via Contacts Tab

Sending Instant Messages Using the Tools Menu:

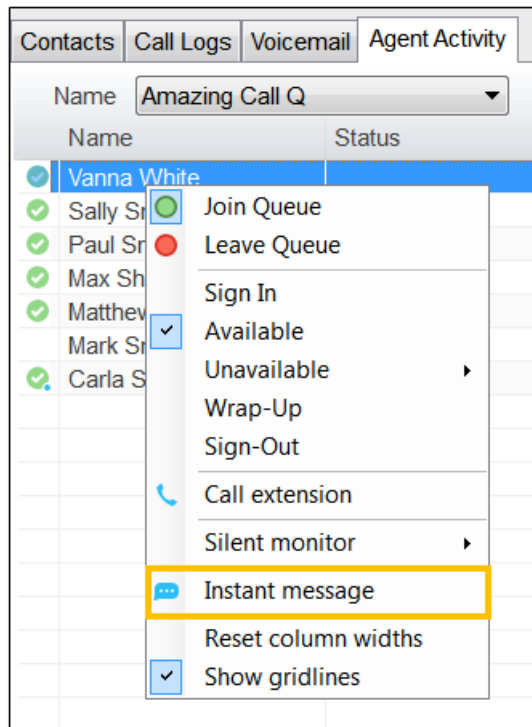
1. Click Tools > Call Centers > *Call Center Queue* > Agents > Agent > Instant Message.



Sending an Instant Message via Tools Menu

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

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



Sending an Instant Message via Agent Activity

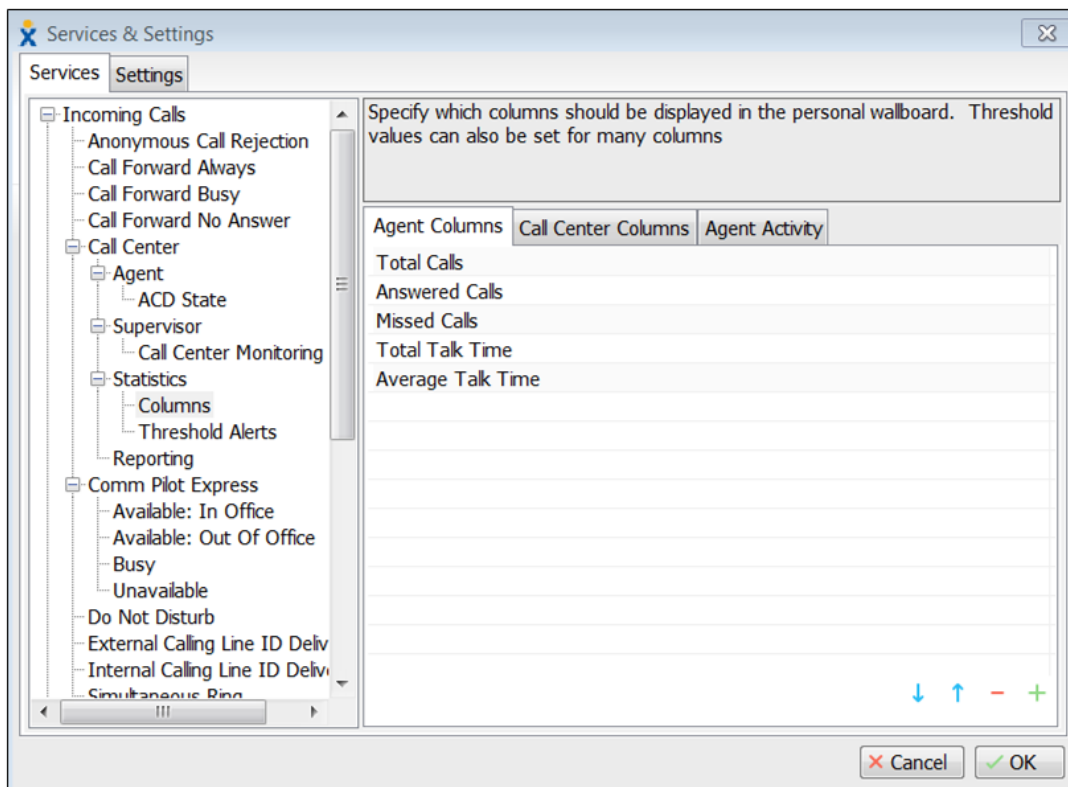
Customizing Statistics

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

To Add a New Statistic:

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

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



Customizing Statistics - Settings

To Remove a Statistic:

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

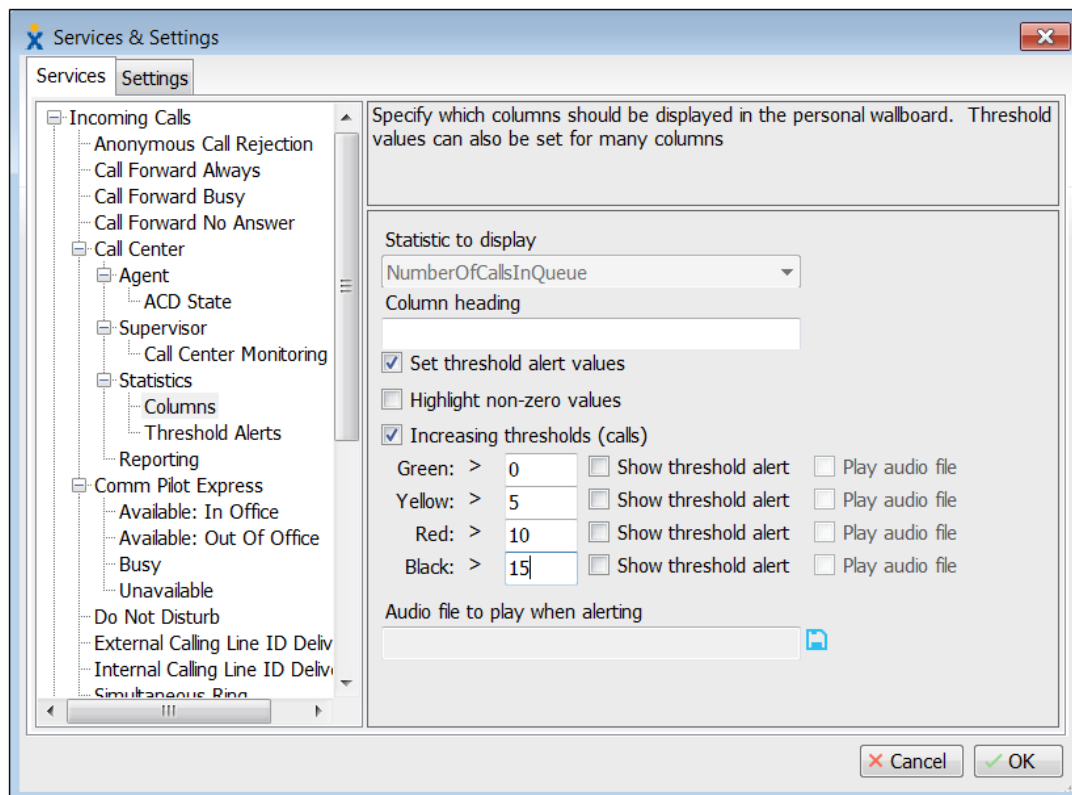
NOTE: Use the up and down arrows at the bottom right corner of the window to adjust the order in which the statistics are displayed.

Configuring Thresholds

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

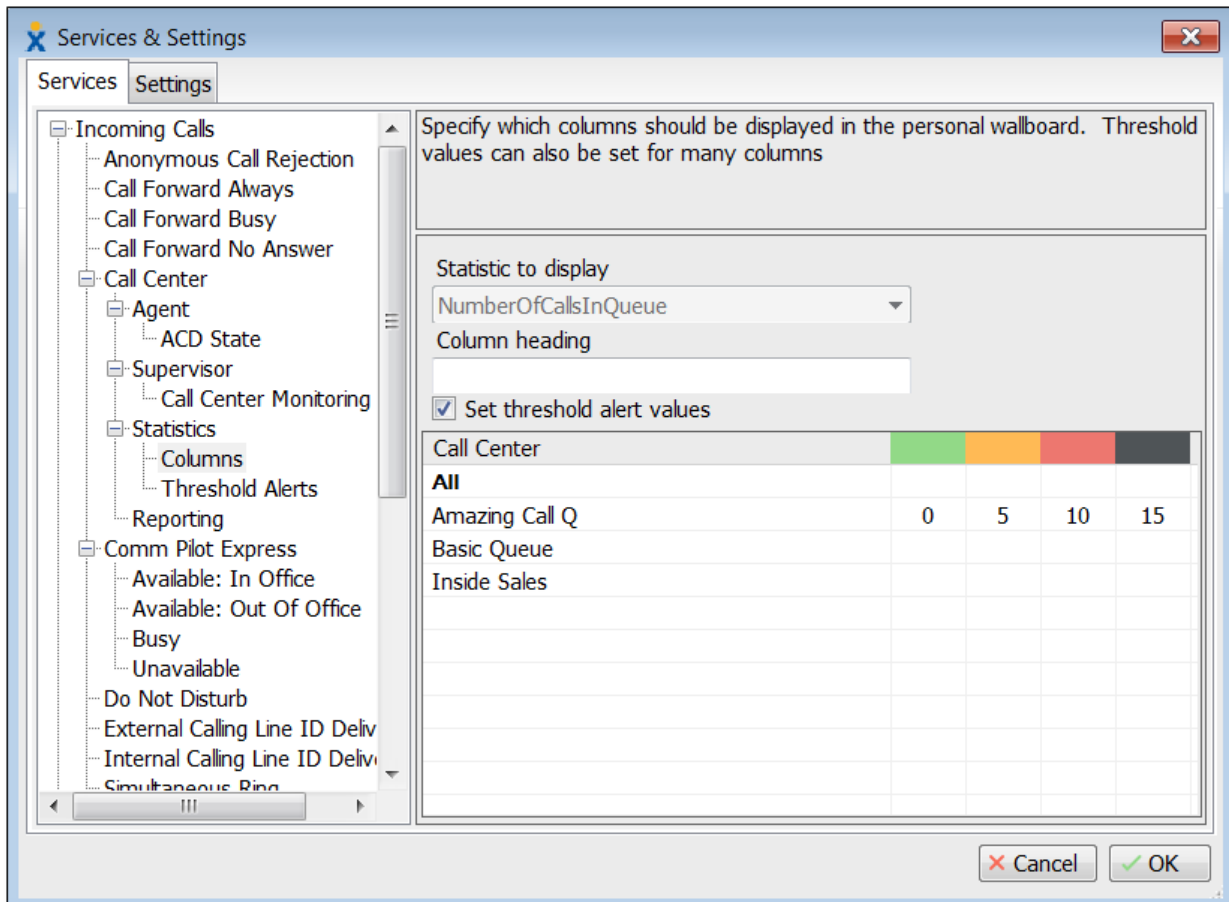
1. Go to **Tools > Services > Statistics > Columns**.
2. Select **Agent Columns (My Statistics)**, **Call Center Columns (Overall Queue Statistics)**, or **Agent Activity**.
3. Double-click the **Statistic** (e.g., Calls In Queue), then click the **Set threshold alert values** checkbox.
4. Double-click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

NOTE: Different thresholds can be set for all queue parameters for different Call Centers, or all Call Centers can have the same threshold.



Configuring Thresholds- Settings

5. Click the **Set threshold alert values** checkbox.
6. Enter the threshold values. Click the **Show threshold alert** checkbox to receive pop-up alerts when the specific threshold is met.
7. Click the **OK** button when finished. The threshold will be set as shown below.



Configuring Thresholds- Settings

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