



Nextiva Receptionist Dashboard

VERSION 1.0

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Nextiva Receptionist Dashboard

The Nextiva Receptionist Dashboard is a carrier-class Internet Protocol (IP) Telephony Attendant Console developed for hosted environments. Quickly launch the Nextiva Receptionist Dashboard from the Nextiva Voice Portal in a web browser, eliminating the need to install software on a local computer.

The Nextiva Receptionist Dashboard is a full-featured client, designed to support the needs of front-office personnel in any environment. It supports the full set of call control options, large-scale line monitoring, queuing, multiple directory options and views, and other features required in large or distributed organizations.

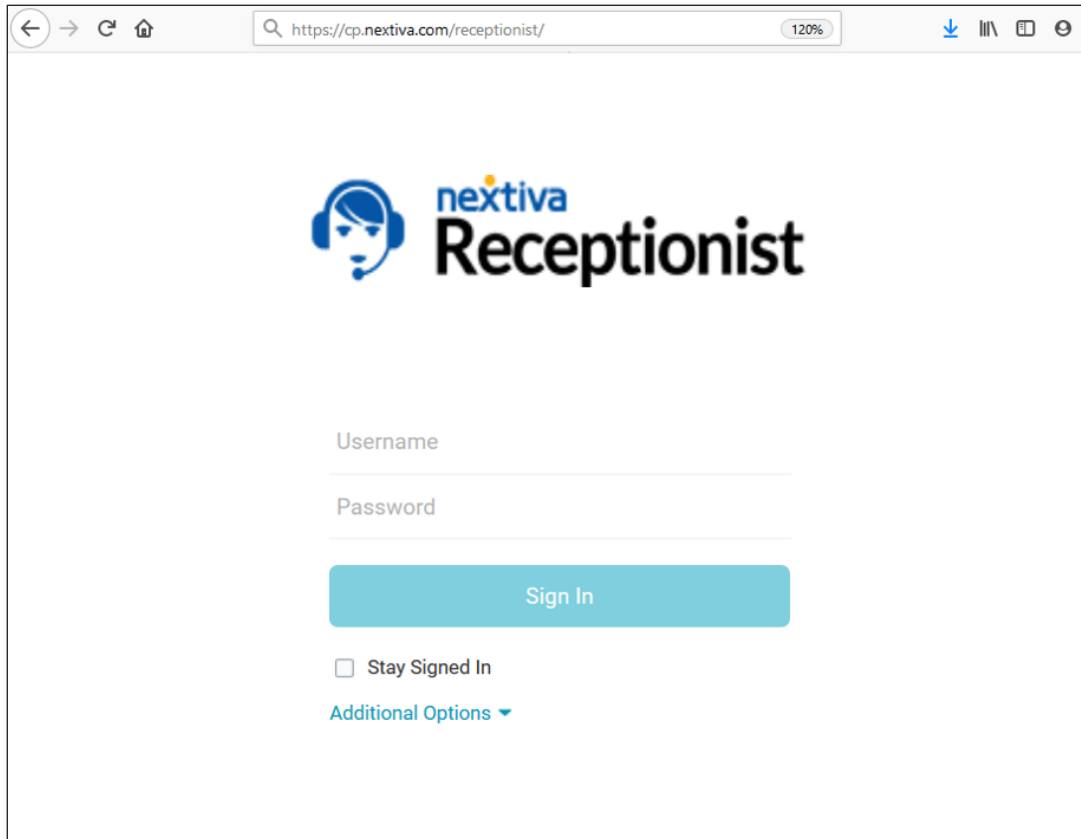
A NextOS Receptionist 1-8 license is required to gain access to the Nextiva Receptionist Dashboard. If the drop-down **Launch Application** option is not available on the Nextiva Voice Portal Dashboard, reach out to an enterprise Administrator to have the license assigned.

Nextiva Receptionist Dashboard Benefits

- An elegant, aesthetically pleasing design that follows the natural “flow” of a call from the left side to the right side of the screen.
- Improved business processes, as only “valid” options are presented to the User.
- Professional call handling as critical information is available in “real-time.”
- Accurate delivery of instant messages, through a one-step process, when Users are unavailable.
- Web-based interface, accessible from a web browser.

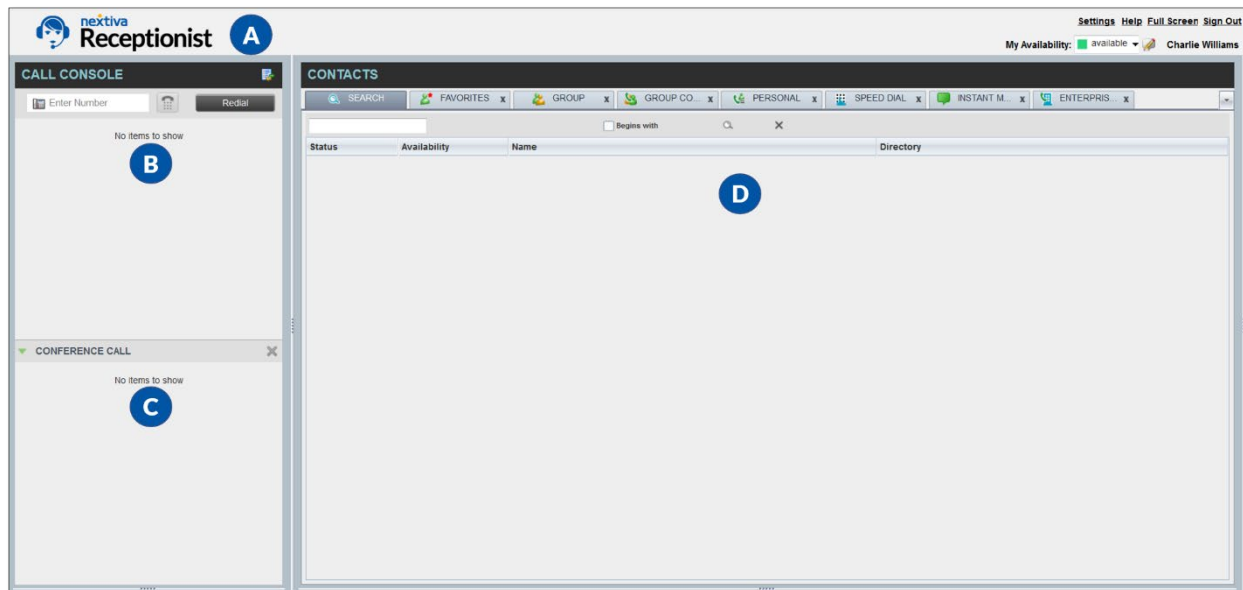
Logging In

1. Navigate to <https://cp.nextiva.com/receptionist/> and enter the User credentials.
2. Click **Sign In** to launch the Nextiva Receptionist Dashboard.

A screenshot of a web browser window showing the login page for Nextiva Receptionist. The browser's address bar displays the URL "https://cp.nextiva.com/receptionist/" and the page is zoomed to 120%. The page features the Nextiva logo (a blue headset icon) and the text "nextiva Receptionist" in a bold, sans-serif font. Below the logo are two input fields labeled "Username" and "Password". A prominent teal "Sign In" button is centered below the password field. Underneath the button is a checkbox labeled "Stay Signed In" and a link for "Additional Options" with a downward-pointing chevron icon.

Nextiva Receptionist Dashboard

Nextiva Receptionist Interface



Nextiva Receptionist Dashboard

The Nextiva Receptionist Dashboard interface displays the following work areas:

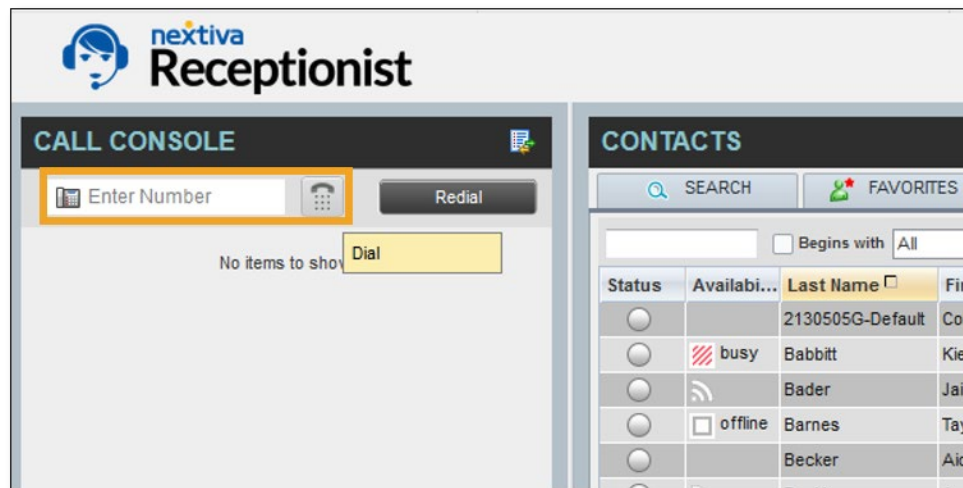
- A. **Logo Pane:** Displays links to other pages or functions of the Dashboard and provides information about the logged-in User. It also shows the error, warning, and information messages to the logged-in User.
- B. **Call Console:** View and manage current calls.
- C. **Conference Call:** View and manage active Conference Calls.
- D. **Contacts Pane:** Access contact directories to make calls to contacts and monitor selected communications.

Call Control

All calls are managed through the Nextiva Receptionist Dashboard and can be placed and received through a desk phone or the Nextiva App.

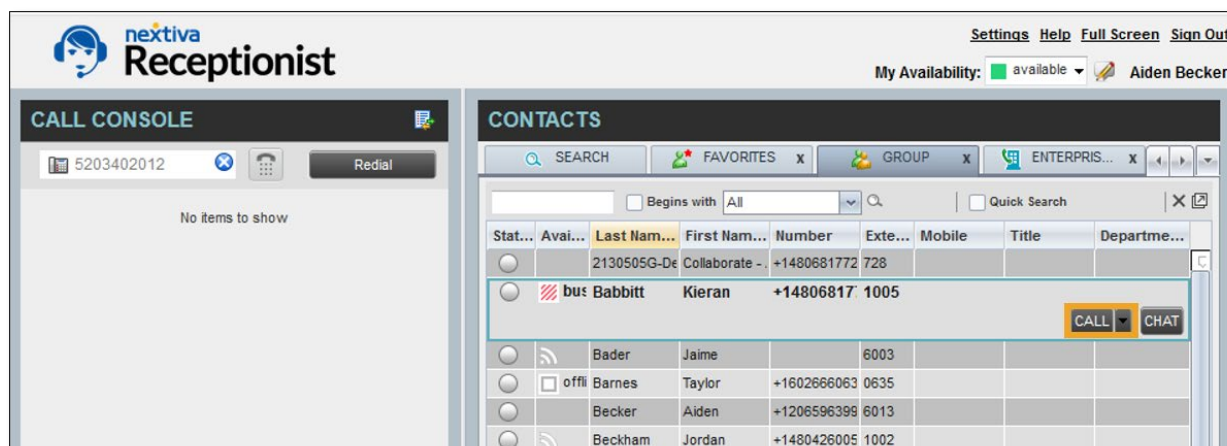
Placing a Call

- In the **Call Console** pane, enter the phone number of the receiving party into the **Enter Number** field and click the **Dial** button to place the call. The Dashboard will ring the associated device or the Nextiva App. Pick up the handset or answer the Nextiva App to activate the outgoing call.



Enter Number and Click the Dial Button

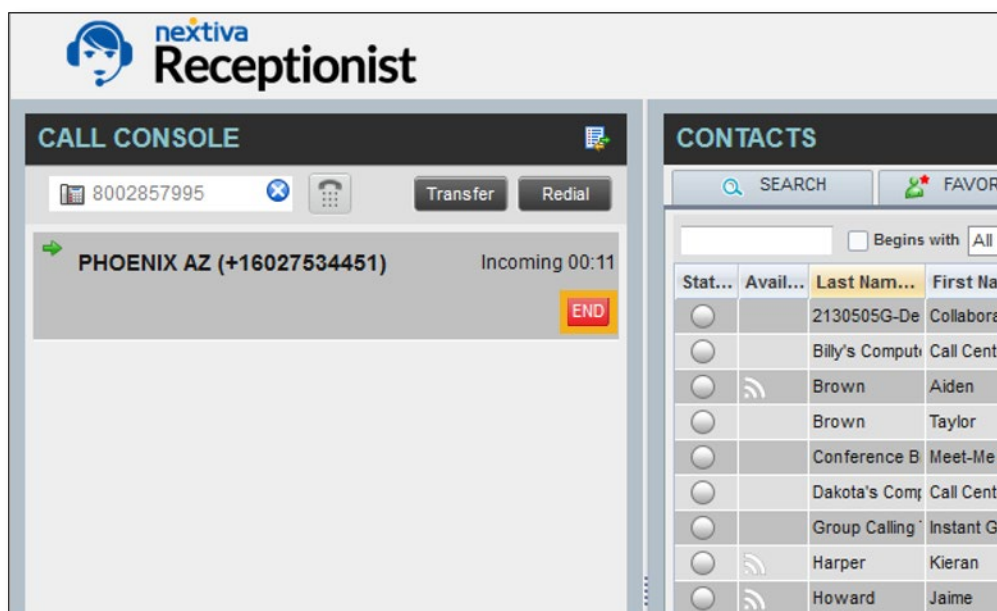
- In the **Contacts** pane, click the desired contact and click **Call**. The Dashboard will ring the associated device or the Nextiva App. Pick up the handset or answer the Nextiva App to activate the outgoing call.



Placing a Call to a Contact

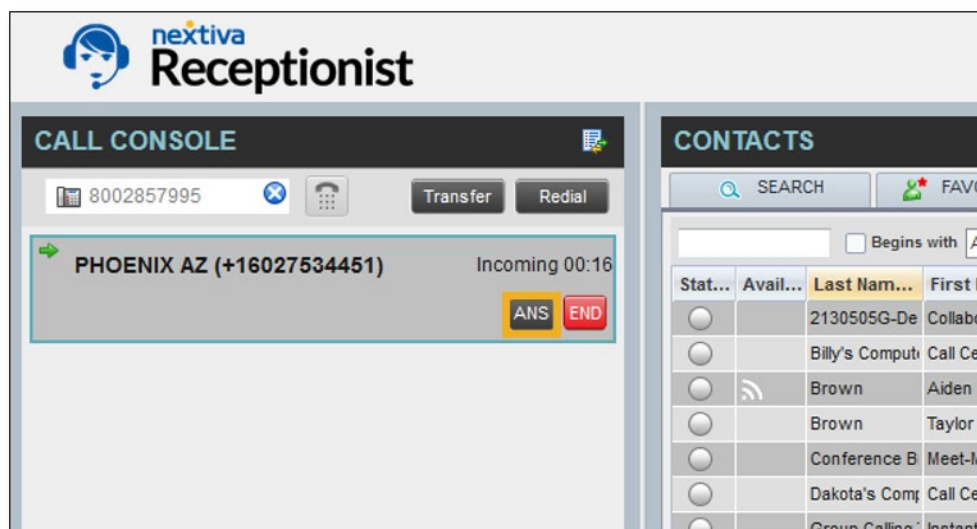
Answering a Call

Incoming calls will display the inbound Caller ID information in the Call Console. If using the Nextiva App, answer the call as usual. The only option available in the Nextiva Receptionist Dashboard is **END** when engaged on a single call on the Nextiva App.



Answering a Call with the Nextiva App

If connected to a desk phone, click **ANS** to answer the call from the **Call Console**. The device will automatically answer on speakerphone if supported. If the device does not support speakerphone functionality, pick up the handset to engage the caller.



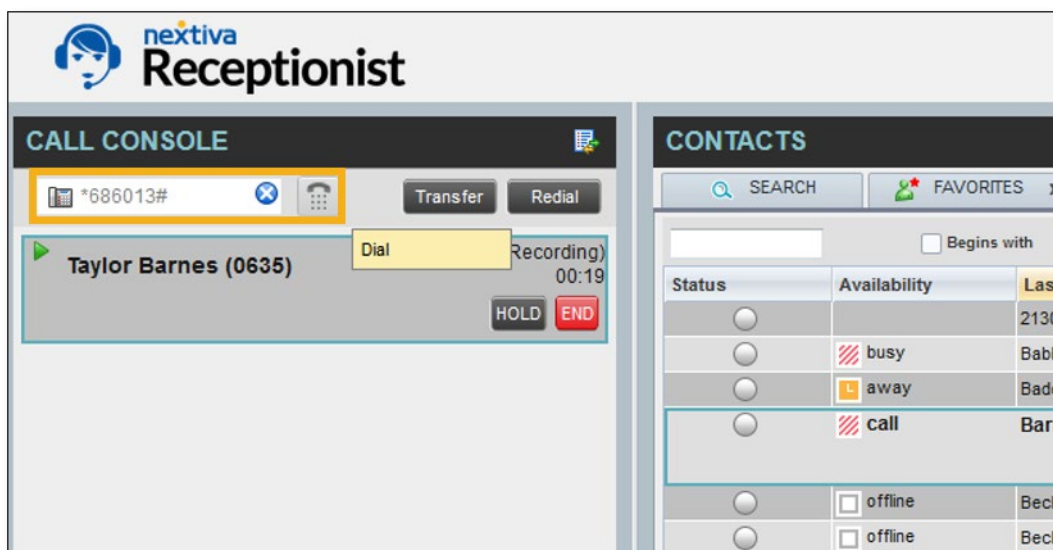
Answering a Call with a Desk Phone

Call Parking

The Call Park service allows Users to park a call against a member of their group so that any other member of the group can retrieve it using a star code. Park a call against any extension on the group or create a group park extension, so multiple Users have a chance to take the call. Calls can be parked by manually dialing or by creating a Speed Dial.

Using a Star Code

1. While on an active call, enter ***68** and the extension to park the call against, followed by **#** (e.g. ***686013#**).
2. Click **Dial**.
3. Answer the Nextiva App or click **ANS** to activate a second outgoing line. The caller will automatically park against the desired extension.

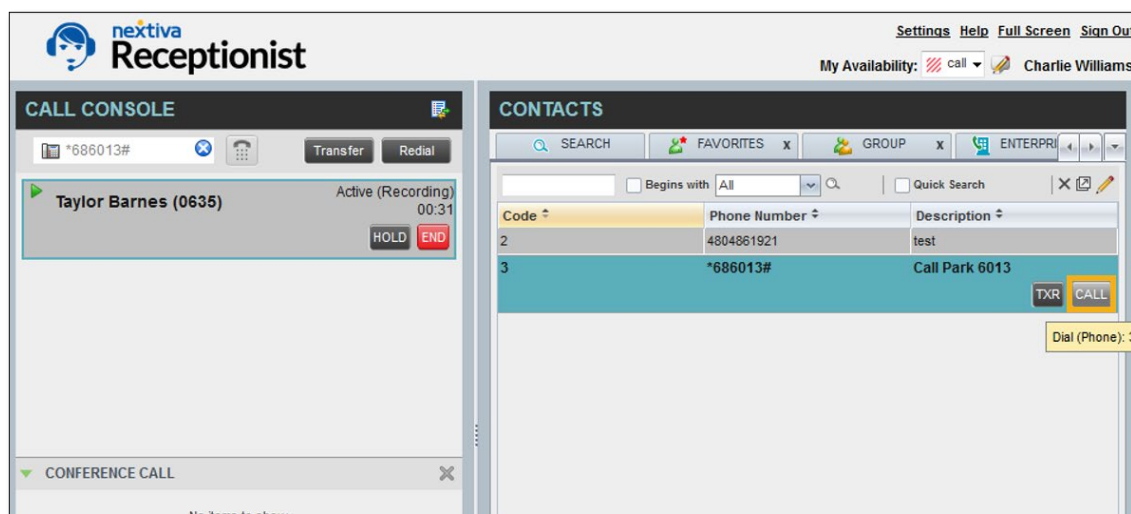


Manually Park Calls Using a Star Code

Park Calls Using Speed Dial

1. With an active call on the line, click the **Speed Dial** directory under the **Contacts** pane.
2. Click the saved **Call Park Speed Dial** option and click **Call**.
3. Click **ANS** to pick up the second outgoing line. The caller will automatically park against the desired extension.

NOTE: To add new Speed Dials for commonly parked-against extensions, click the **Pencil icon** (✎) in the upper-right corner of the **Contacts** pane, then click **Add**.



Parking a Call with Speed Dial

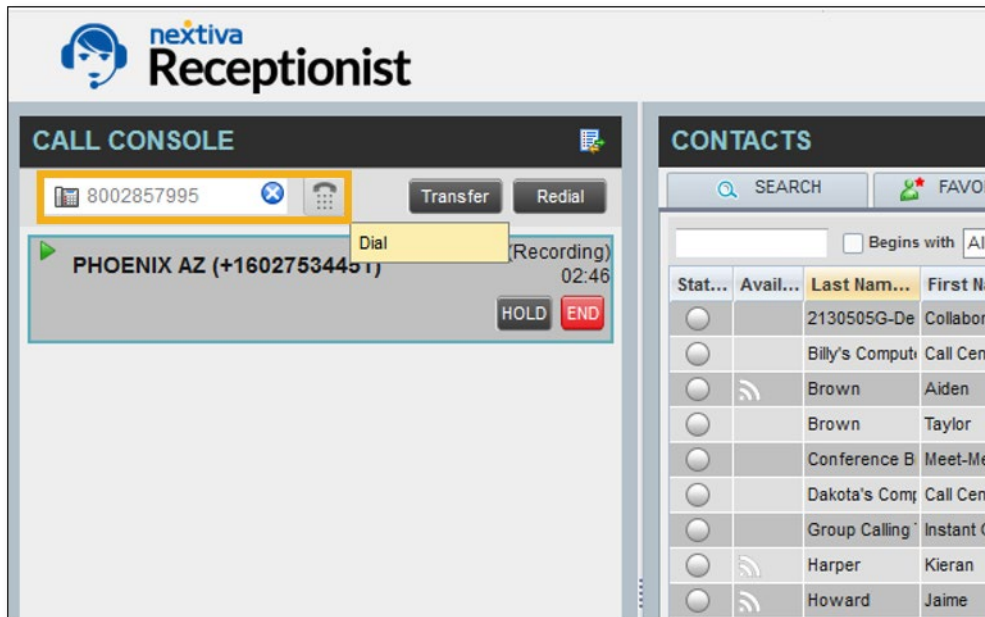
Transferring Calls

A Warm (attended) Transfer allows users to speak privately with the receiving party before connecting the call. A Warm Transfer also confirms the availability of the receiving party.

A Blind (unattended) Transfer 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.

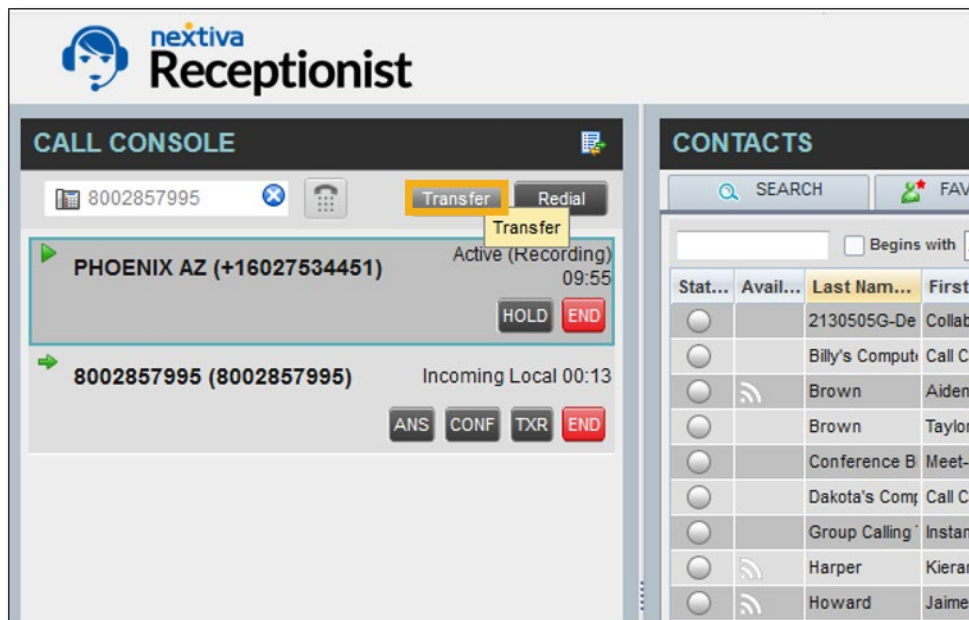
Warm (attended) Transfer

1. With an active call on the line, enter the phone number or extension of the receiving party in the **Call Console**.
2. Click the **Dial** button to make a second outgoing call and place the first caller on hold.



Dial Button

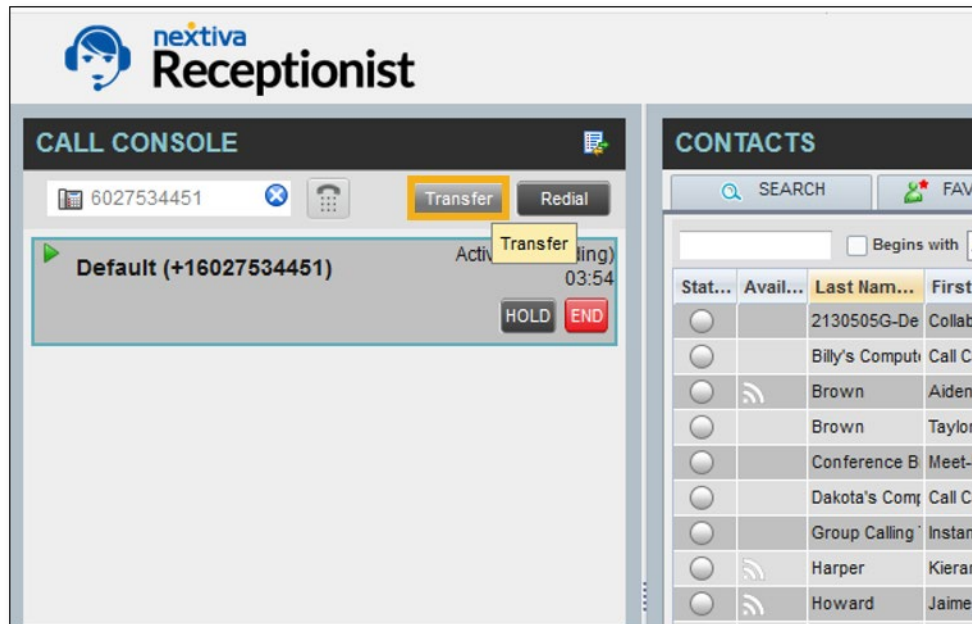
3. Greet the receiving party and advise them of any critical information.
4. Click the **Transfer** button to Warm Transfer the call.



Transfer Button

Blind (unattended) Transfer

1. With an active call on the line, enter the phone number or extension of the receiving party in the **Call Console**.
2. Click **Transfer** to Blind Transfer the call immediately, opening the line for a new call.

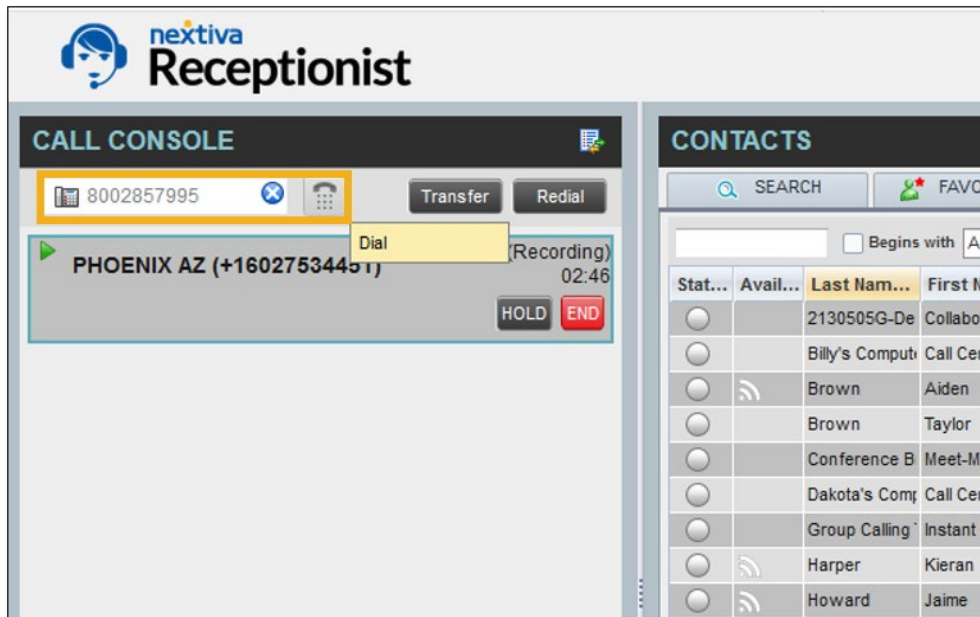


Blind Transferring a Call

Conferencing

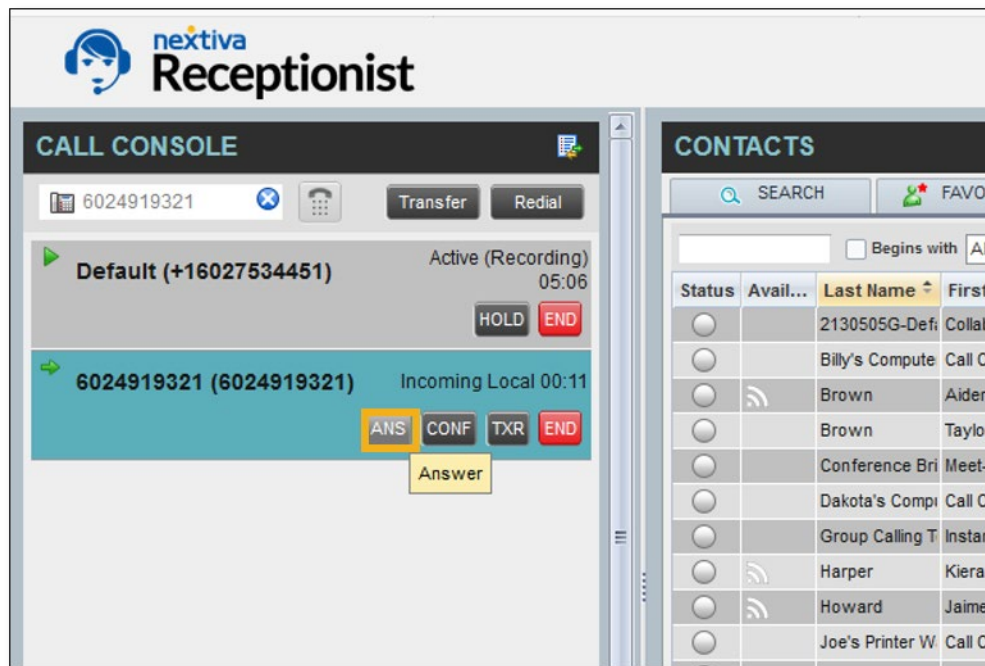
Initiating a conference call allows Users to add a third party to a conference so that all parties can speak with each other. Commonly used to redirect customers to the appropriate User or Department, Conferencing allows multiple parties to interact at once, with a maximum of 6 total participants.

1. With an active call on the line, enter the phone number or extension of the third party and click **Dial**.



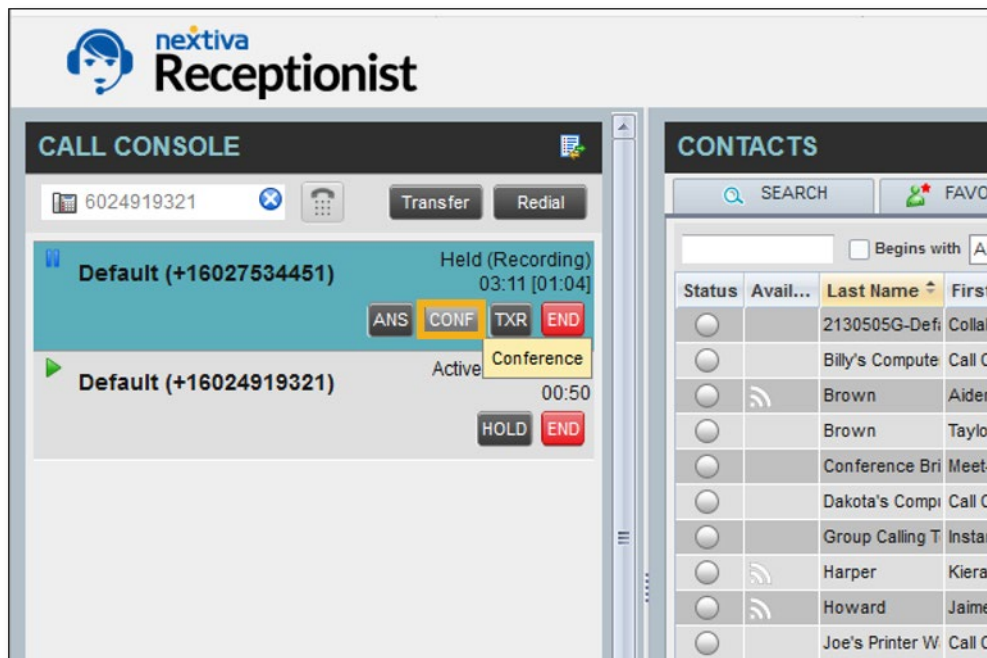
Initiating New Call

2. Click **ANS** to place the initial call on hold and dial out to the third party.



Dialing Out to the Third Party

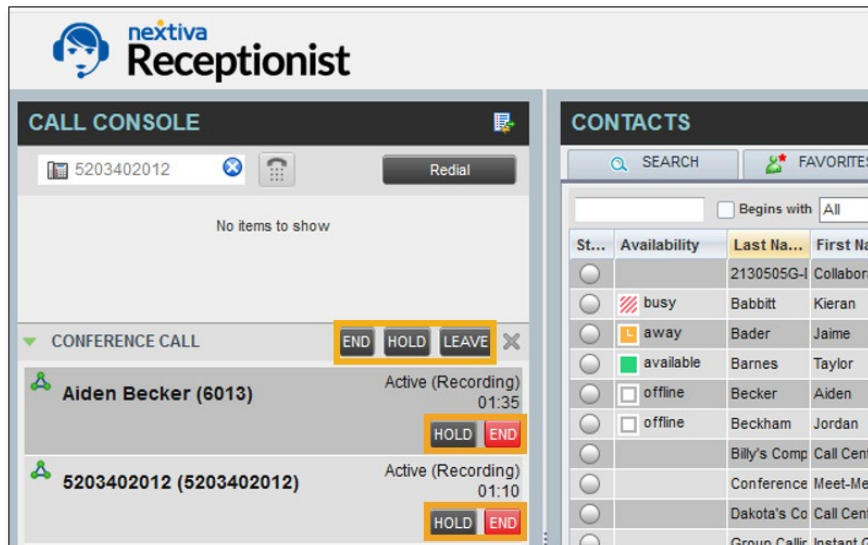
3. Speak to the third party and click **CONF** to bring all parties on the line together, moving the conversation to the **Conference Call** pane.



Conferencing All Parties Together

Conference Call Controls

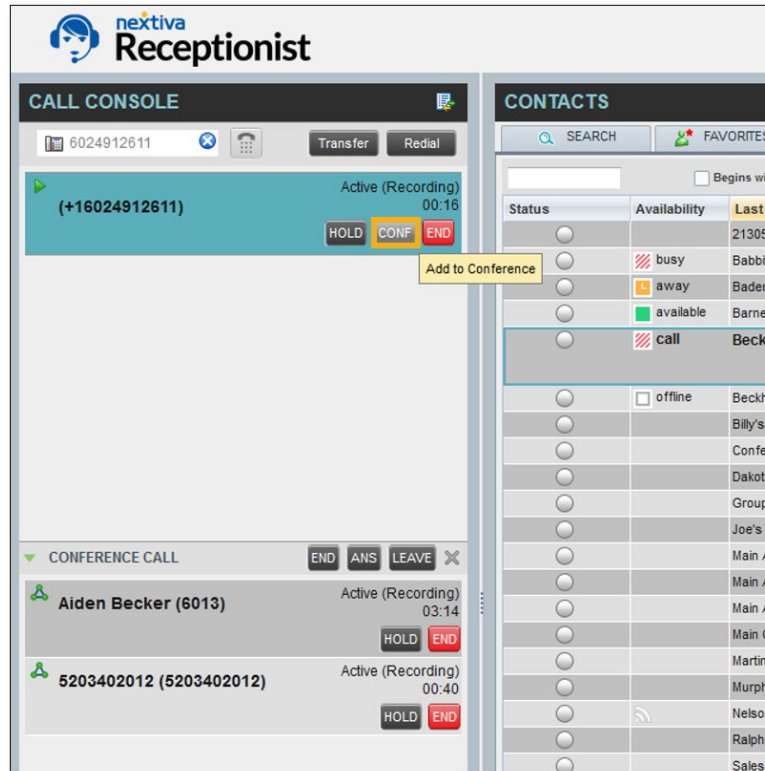
- **END (Conference):** Ends the call, disconnecting all parties.
- **HOLD (Conference):** Places the conference on hold, leaving both external parties connected without hold music playing.
- **LEAVE (Conference):** Leaves the conference call with both external parties still connected.
- **END (Participant):** Removes a participant while keeping the conference active with other participants.
- **HOLD (Participant):** Places a participant on hold while keeping the conference active with other participants.



Conference Call Controls

Adding Additional Callers to a Conference Call

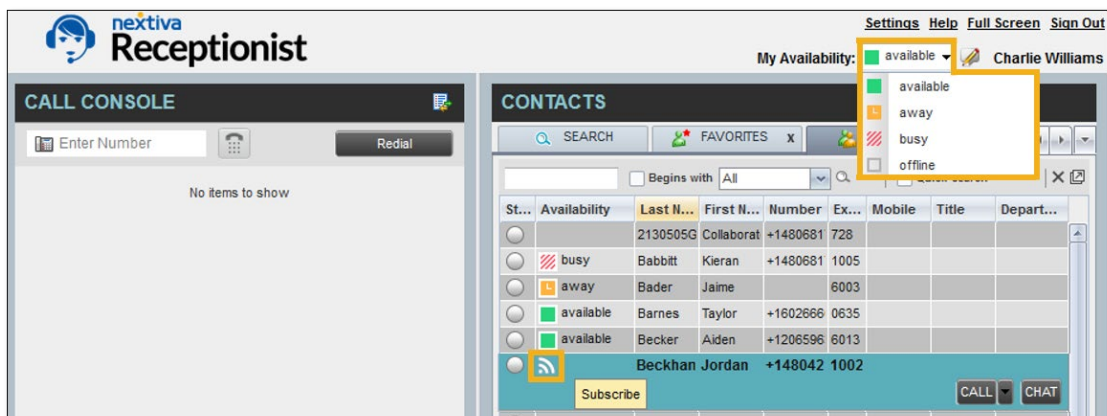
1. With an active conference on the line, enter the phone number or extension of the new party and click **Dial**.
2. When the other party answers the call, click **CONF** to join all callers to the same conference. Repeat these steps to add up to a total of 6 concurrent participants.



Adding Additional Callers to a Conference

Availability and Team Presence

With the Nextiva Receptionist Dashboard, any Users on the Nextiva App will display their Team Presence, known as **Availability** in the Dashboard. The Dashboard will automatically show when subscribed Users are on a call. Click the **Subscribe** icon to request permission to view a User's availability. Team Presence can be adjusted when using the Dashboard by clicking the **My Availability** drop-down menu.



Subscribe to View a User's Availability and Set Personal Availability

Contact Directories

Directory Name	Contents	Comments
Favorites	Contacts whose phone statuses are monitored. The list of contacts to monitor must be configured by a User or Administrator.	Monitoring is limited to 200 static contacts enterprise-wide.
Group/Enterprise	All contacts in the Nextiva Group or Enterprise directory. This same directory is also accessed through the web portal. If an enterprise Administrator has restricted access to the enterprise directory, only the contacts in the group will be accessible.	The maximum number of contacts that can be dynamically monitored is configured by the enterprise Administrator, and it cannot exceed 100.
Group/Enterprise Common	All contacts in the group's or enterprise's common phone list, configured by the enterprise Administrator.	The directory may be empty if the enterprise Administrator has not configured any contacts.
Personal	All contacts in the personal directory on the Nextiva Voice Portal.	If the directory is empty, it will not appear.
Speed Dial	All speed dial codes configured for Speed Dial services.	The speed dial service must be assigned by an enterprise Administrator. Click the Pencil icon to edit the Speed Dial list.

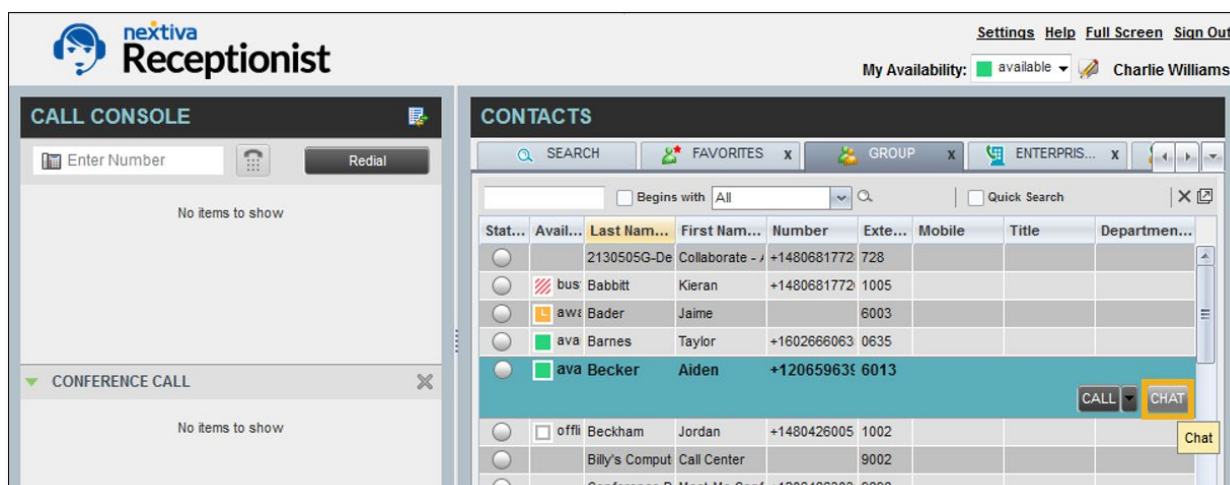
Chat

In the Nextiva Receptionist Dashboard, chat with Users logged in to the following applications:

- Nextiva Supervisor Dashboard
- Nextiva Agent Dashboard
- Nextiva Receptionist Dashboard
- Nextiva App

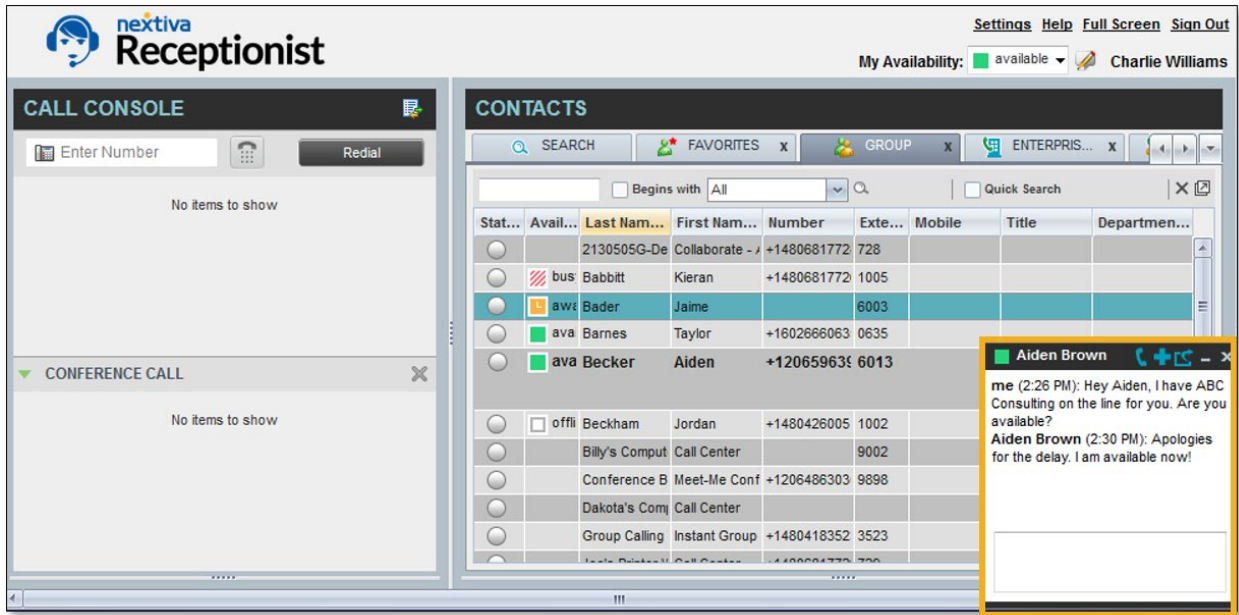
If a User is not available, missed messages will appear in the Nextiva App **Chat History** section or auto-populate when the User logs back in to the Supervisor, Agent, or Receptionist Dashboard.

1. Click a User in the Receptionist Console, then click **CHAT**.










Chat Button in the Nextiva Receptionist Dashboard

2. Enter a message for the User and press the **Enter** key.



Chatting with Another User

When engaged in a chat window, click an icon to perform the corresponding action.

	Call the User.
	Add Users to the current Chat window.
	Pop out the Chat window from the Dashboard into a new window.
	Restore the Chat window to the Dashboard.
	Minimize the Chat window.
	Maximize the Chat window.
	Close the Chat window.

Chat Action Icons