Nextiva Call Center Enterprise

Administrator Guide

VERSION 3.0

Table of Contents

Product summary 2
Product Requirements 2
Nextiva Voice Administrator Portal: Logging In 2
Navigating to Call Center from NextOS 3
Navigating to Call Center from Nextiva Voice 3
Nextiva Call Center portal 4
Navigating the Portal 5
Call Center: Profile 5
Call Center: Profile (Other Features) 7
- Announcement Repository 7
- Call Center: Thresholds 9
- Announcements 12
- DNIS (Dialed Number Identification Service) 17

Call Center: Routing Policies Page 19
- Night & Holiday Service 20
- Call Center: Bounced Calls 21
- Call Center: Overflow Routing 22

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Product summary

The Nextiva Call Center Enterprise offering provides Nextiva customers with a complete suite of communication features including advanced routing, custom ACD status, DNIS, after hours routing, and reporting. Call Center Enterprise pairs Nextiva voice options, such as HD voice, vFAX, mobile app, and team presence, with advanced call center access, customizable call center routing options, and unique messaging.

Product Requirements

In addition to a Business Communication Suite (Basic, Pro, or Enterprise), a Nextiva Call Center Enterprise license is required to take advantage of features detailed in the sections below

Nextiva Voice Administrator Portal: Logging In

Visit www.nextiva.com, and click **Client Login** to log in to NextOS.

If you purchased Nextiva business voice service before December 2020, be sure to refer to the Navigating to Call Center from Nextiva Voice section.

If purchased after December 2020, refer to the Navigating to Call Center from NextOS section below.

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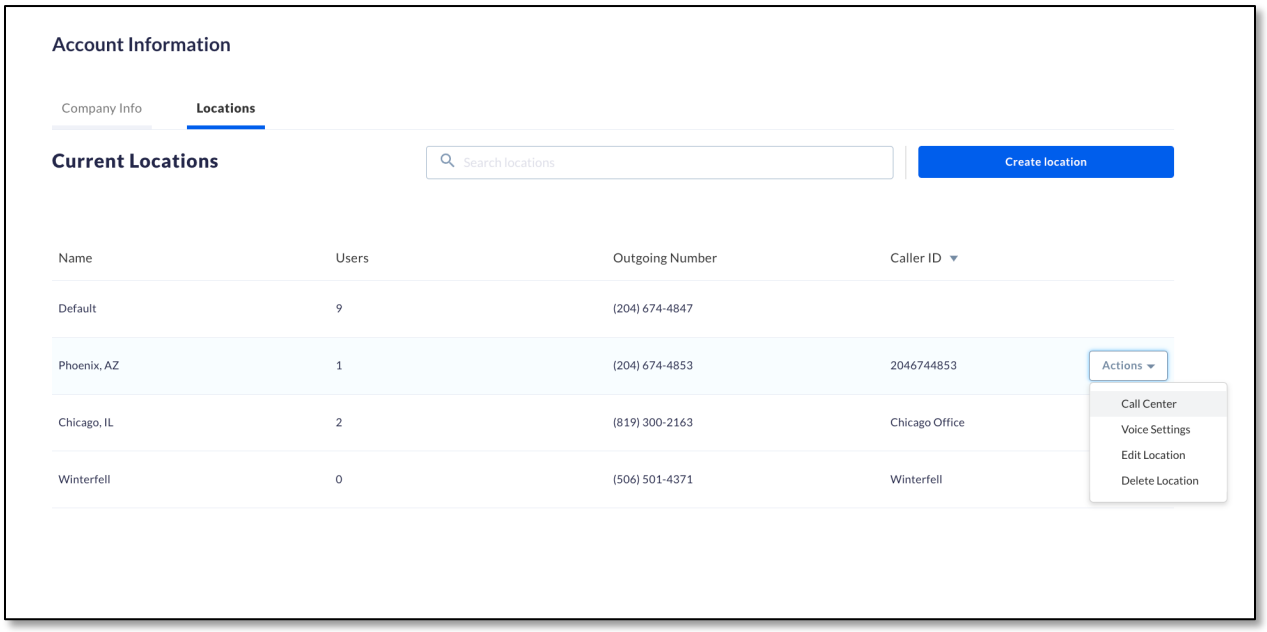
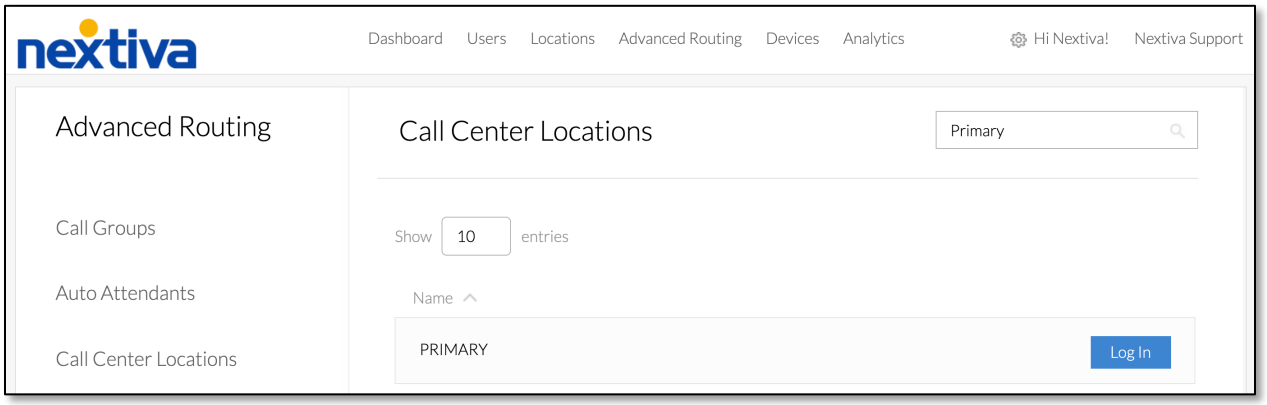
Navigating to Call Center from NextOS

From the NextOS home page, select Communication > Phone System > Voice Overview > Manage Locations > Actions > Call Center.



Navigating to Call Center from Nextiva Voice

From the Nextiva Voice admin dashboard, navigate to Advanced Routing > Call Center Locations > Log In.



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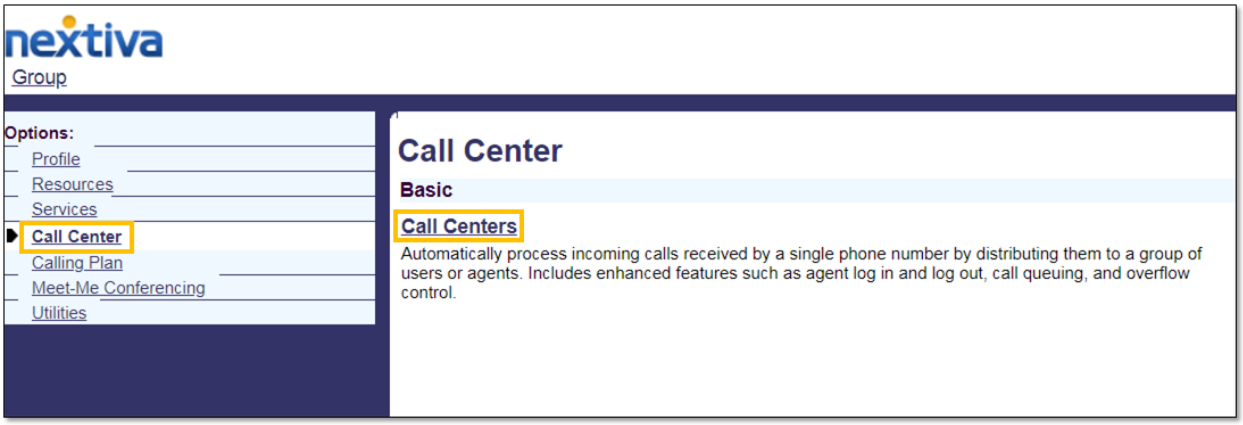
Nextiva Call Center portal

A new window will open displaying the configuration portal (if this isn't automatic, please ensure pop-up blockers are deactivated).

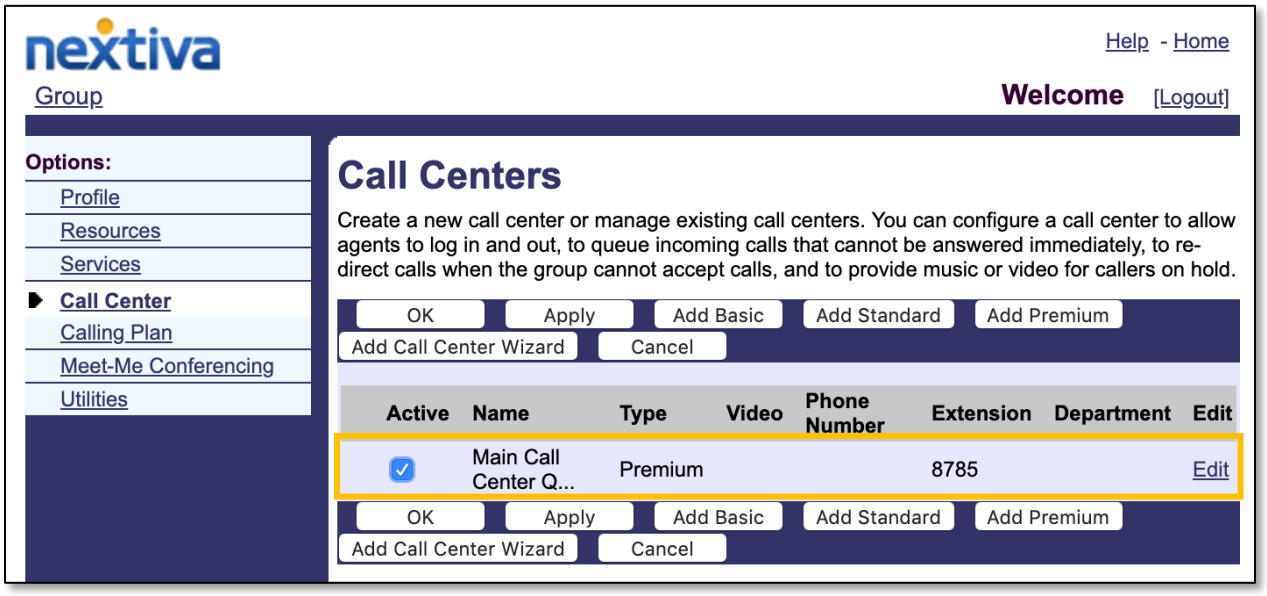
From this screen, select **Call Center** from the menu on the left.

To access a specific queue, click **Call Centers** under Basic.

> NOTE: If there are no call centers listed, or the option is missing from the menu on the left, please contact our Amazing Service team for assistance.



All of the Call Centers associated with this location are displayed. Here, basic information is displayed, including the phone number and/or extension. To deactivate a queue, or take it offline without deleting it, click the checkbox to the left of the Call Center queue name.



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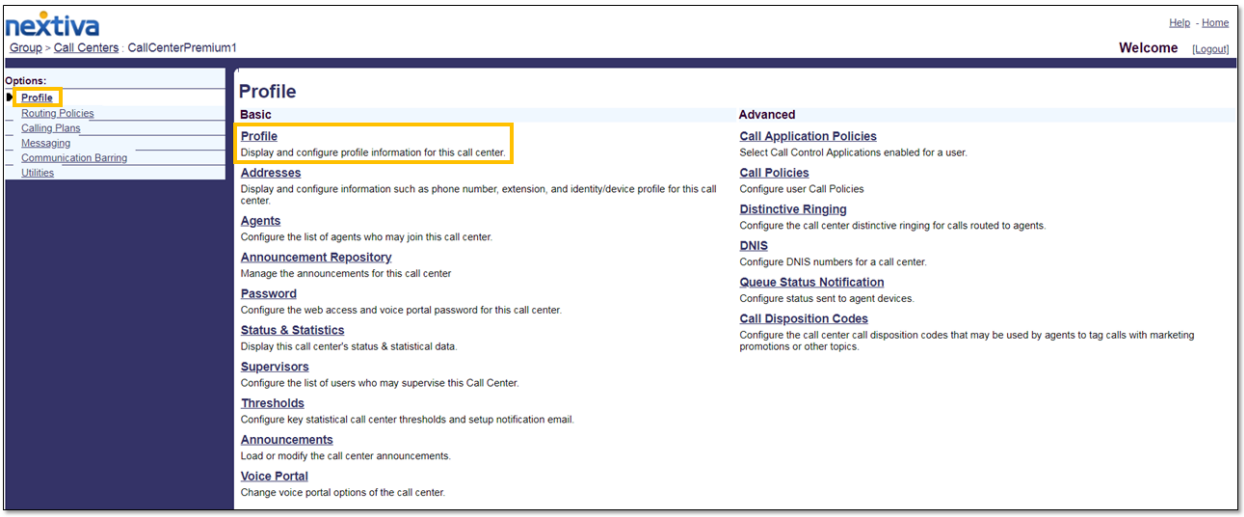
Click on the Call Center Queue needing to be managed or edited. This will open access to the profile and key management features of the Call Center.

> NOTE: Call Center licenses include unlimited Call Center queues. Pro or Enterprise user/agent licenses are sold per-agent. Agents must have a Call Center Pro or Enterprise license assigned to their user profile to receive calls from a Call Center Queue. Dashboards, such as Agent or Supervisor, are additional features that may be added.

Navigating the Portal

For Administrators looking to access the most popular features of a Call Center queue, check out the top two menu options on the left-hand side of the portal: **Profile** and **Routing Policies**. This module will focus on key features within these two menu options.

First, let's explore the **Call Center Profile** option.



Call Center: Profile

For Administrators seeking to make changes to the setup of a specific Call Center queue, click **Profile** on the left menu, and then click the **Profile** option under Basic.

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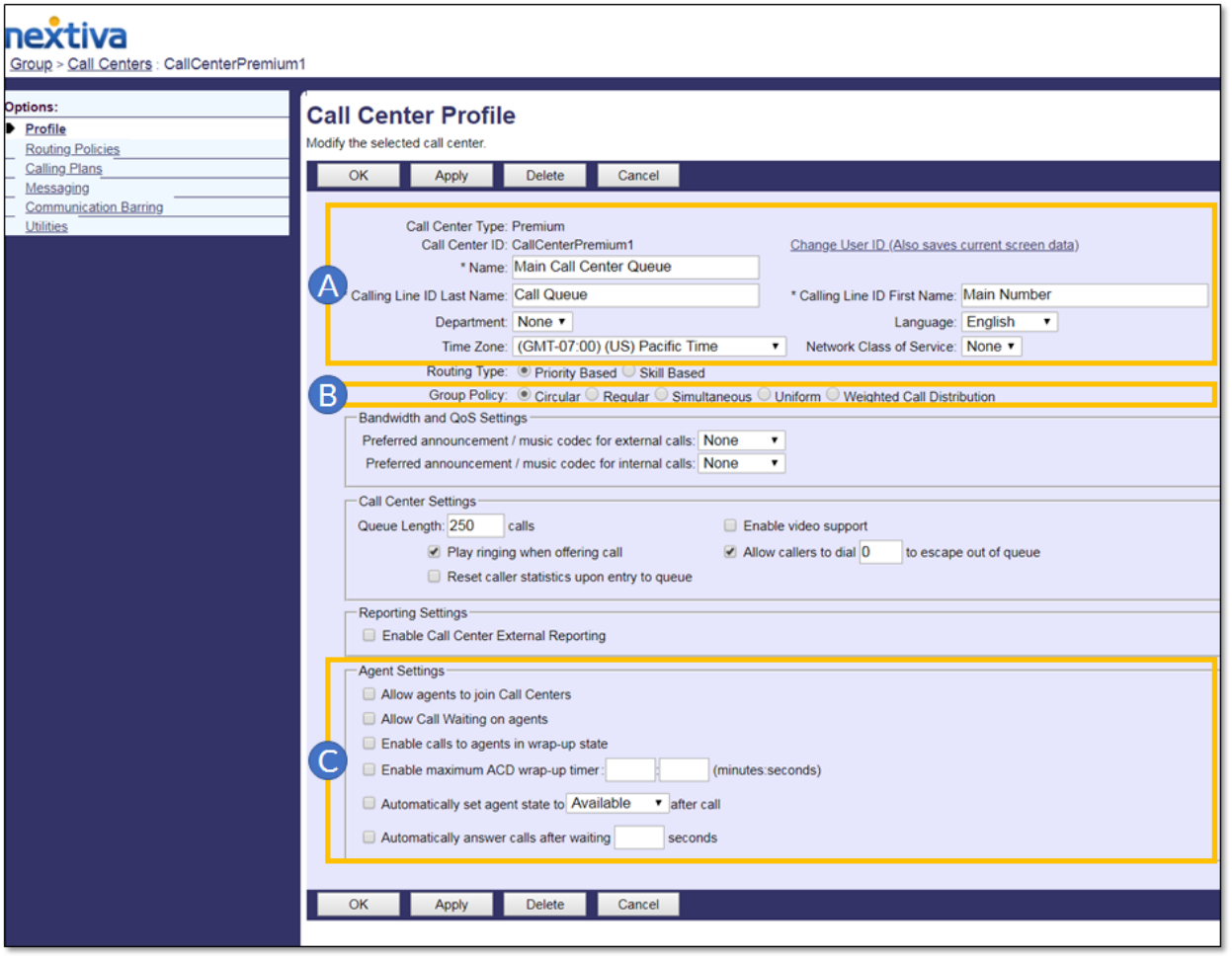
Nextiva not only offers multiple programmable settings to customize the caller's experience while waiting for a live agent, there are also intuitive routing options to determine which waiting caller should be delivered to an agent first (skill-based).

Additionally, the queue may be tied to a Department or Time Zone (see below).



NOTE: The queue pictured above is set up as a Premium, or Enterprise-level, Call Center queue. This means all Nextiva Call Center Enterprise features are available and are included in the account.

A. At the top of the setup screen, Administrators can change key identifiers, such as the name of the Call Center queue and the user ID.

- Calling Line ID First/Last Name field: A customizable field that will be presented to the call recipient on the Caller ID. This is especially important for identifying how the caller reached the agent's phone.

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Example: A caller reaches the main Auto Attendant and pushes 1 to access the Marketing queue. The Calling Line ID may show "Marketing Call" so the agent can answer the call appropriately.

B. There are five Group Distribution Policies or options to deliver calls to a group of users:
   - Circular: Calls are delivered in a round-robin configuration, delivering calls to Agents in the order A-B-C-A-B-C.
   - Regular: Calls are delivered to the Agents starting at the top of the list with each new call. A- always try first. B- only if A is on a call. C- only if A and B are on calls.
   - Simultaneous: Calls are delivered to all users at once. ABC – ring all.
   - Uniform: Calls are delivered to the Agent who has been idle the longest. This policy aims to be as fair as possible at delivering calls.
   - Weighted: As an Administrator, certain percentages or weights can be added to strong Agents (or reduced for new hires or weaker Agents, for example).

C. Under Agent Settings, there are six additional options to customize a queue.
   - Allow agents to join (and unjoin) Call Centers: This option is not normally recommended.
   - Allow Call Waiting on agents: When activated, Call Center Agents can toggle between calls and callers on hold.
   - Enable calls to agents in Wrap-Up state: After a call is finished, Administrators and Agents have the ability to turn on a Wrap-Up state, usually utilized for updating tickets or completing call-related tasks. To "ignore" this status and deliver calls to an agent while in Wrap-Up state, activate this option by checking the box.
   - Enable maximum ACD Wrap-Up timer: Limit the time an Agent can be off the phone in Wrap-Up state.
   - Automatically set agent state to Available after call: Other options include Wrap-Up and Unavailable.
   - Automatically answer calls after waiting __ seconds: This option is not normally recommended.

Call Center: Profile (Other Features)

Announcement Repository

Nextiva makes managing recorded messages easier than ever with multiple, centrally located Announcement Repositories, which make updating what callers hear simple and quick for Administrators.

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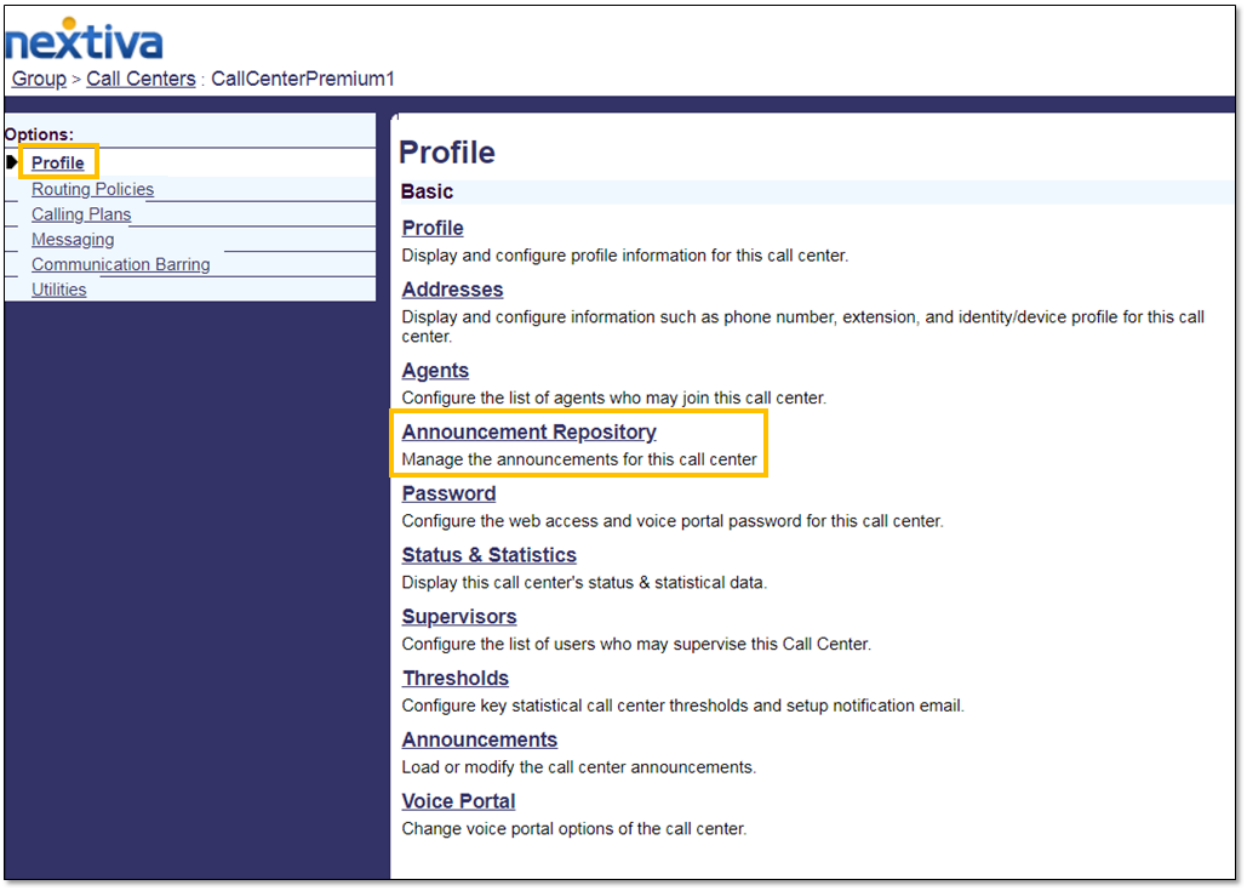
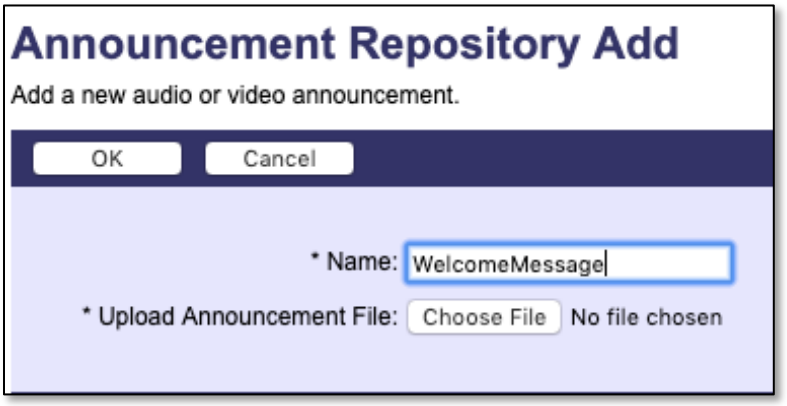
Each Call Center queue has a designated Repository. To access, click **Announcement Repository** from the Profile main page. Click **Add** to name and upload a new file.





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To upload a recorded file, it must follow these formatting rules:

.wav file type
PCM Uncompressed (sometimes called u-Law)
8 or 16 Bit
8000 HZ
Mono

- Please note, individual files larger than 2MB may not upload.
- Custom messages, recordings, and Music on Hold files can be uploaded to any one of many centralized Announcement Repositories. Each user has their own Announcement Repository, as does each Location, Call Center, and Auto Attendant.
- Files recorded via the Voice Portal (dial 9999) will also show in a Repository.
- Once a message/greeting is loaded to a Repository, it can be assigned to a Voicemail, Auto Attendant, After Hours greeting, or any other place callers hear messaging.

  TIP: To record multiple messages easily, turn on VM to Email for a user, and then call the user and leave the recordings as VM messages. The system will email the files to the user for easy upload to the system.

To return to the Profile main page, click OK.

Call Center: Thresholds

To configure key statistical Call Center thresholds to better manage busy times, as well as receive notification emails when the Call Center traffic exceeds custom predetermined limits, Administrators can utilize the Thresholds feature.

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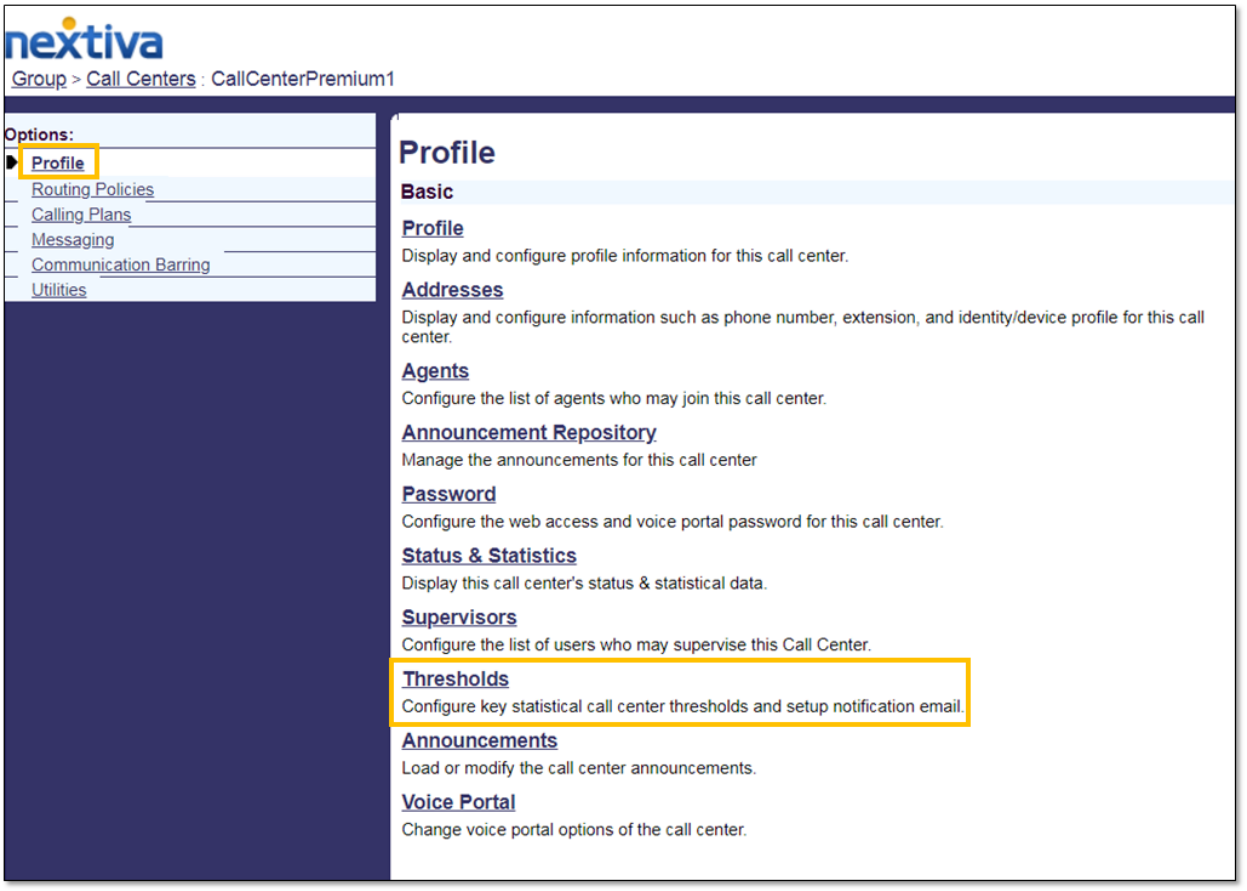

When Call Center Thresholds are activated, and a limit is exceeded, notification emails can be sent to all concerned parties. The goal is to alert as many people as possible to create urgency and, hopefully, lower call queue status below the acceptable levels quickly before callers start to hang up.

Select the Call Center Thresholds desired and enable them by setting a value to the right (see below). In this example, when the number of calls in a queue exceeds 10 callers, a Yellow Threshold has been triggered. Also, when the average handling time exceeds 10 minutes, alerts will be sent to managers@ourcompany.com.

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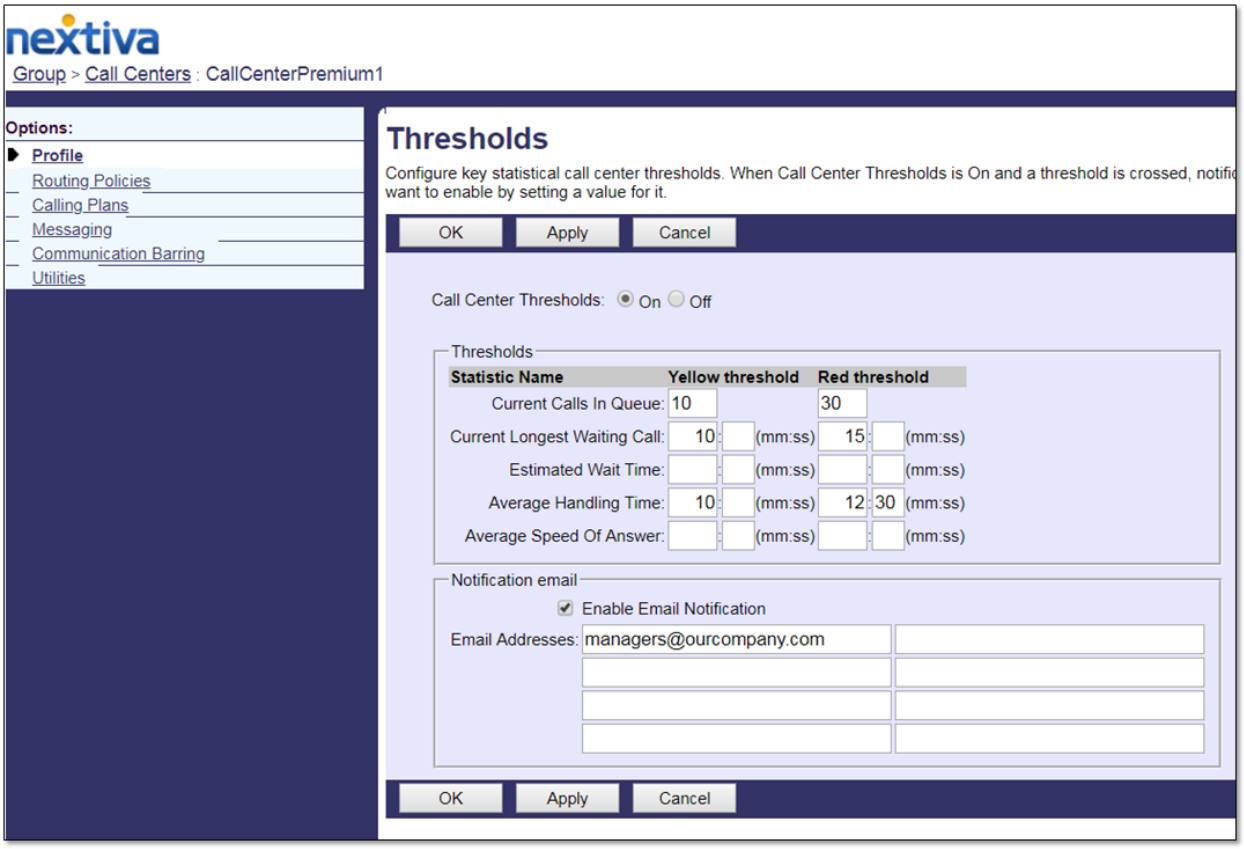

These Yellow and Red Thresholds are displayed on the Call Center dashboard when appropriate. This helps to ensure Agents and Supervisors are all aware of the Call Center traffic.

NOTE: This feature requires an add-on for Enterprise Call Centers.

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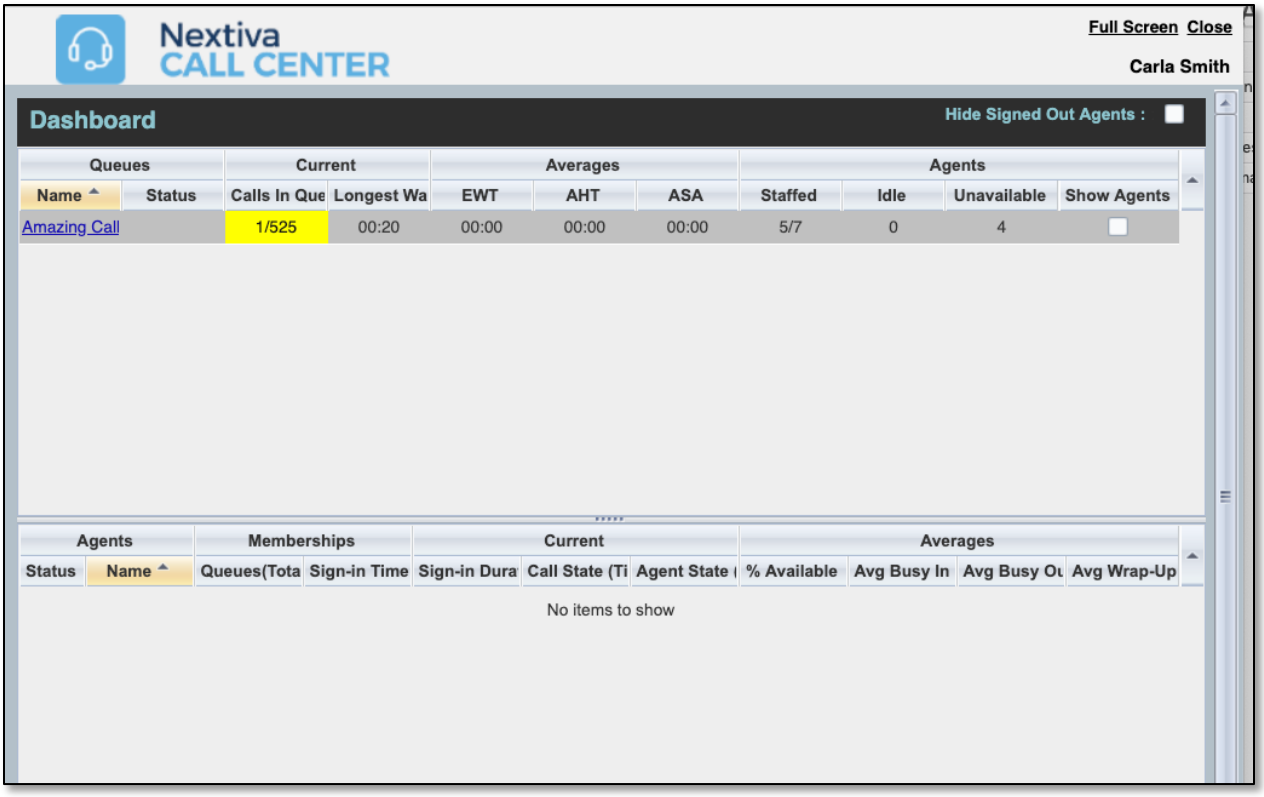

Announcements

Queued callers hear a customized message and/or music, including an initial greeting, HD Music on Hold, advertisements, estimated wait times, and periodic comfort announcements.

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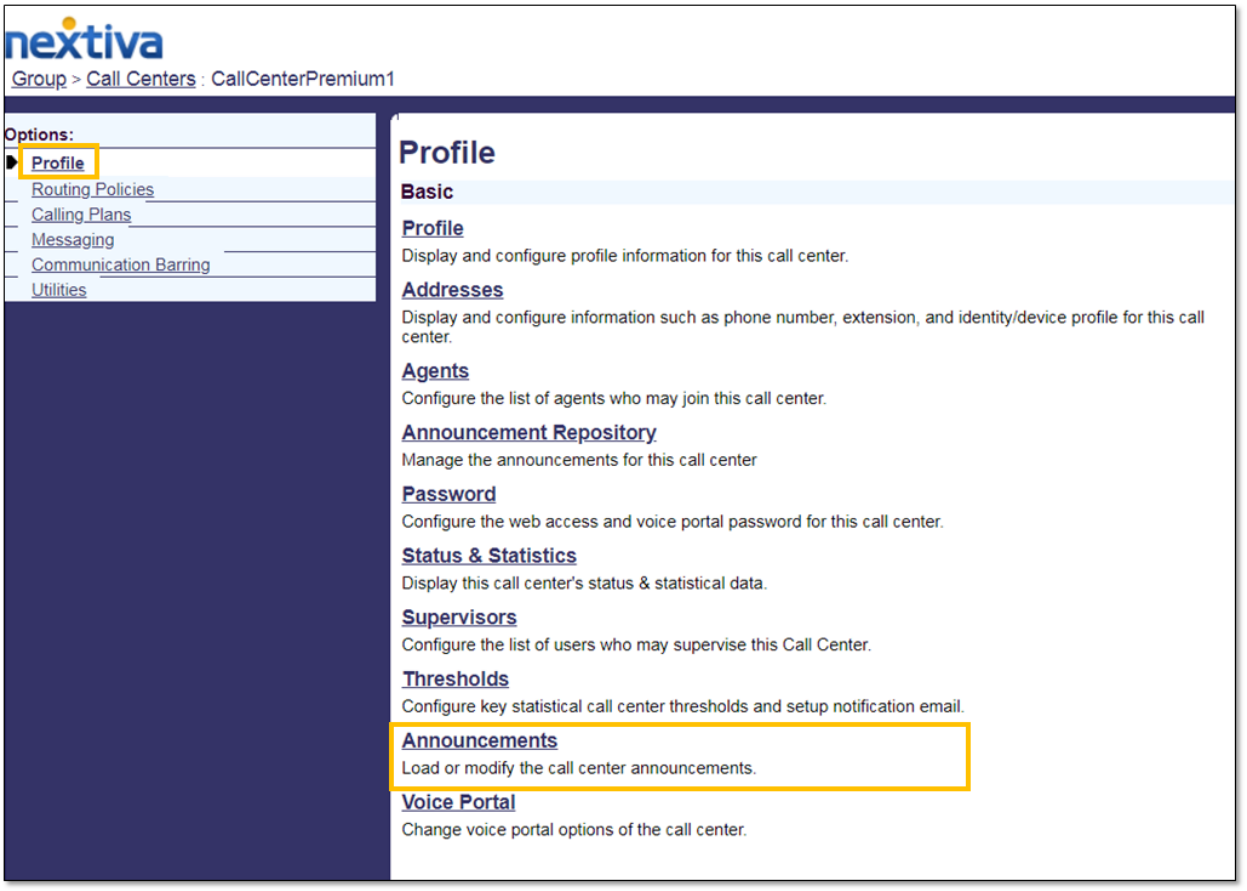

Once files are uploaded to the Announcement Repository, they can be assigned as outgoing messages so callers can hear them. Messages may introduce the caller to a queue, thank them for their patience or announce they've reached a voicemail box, for example.

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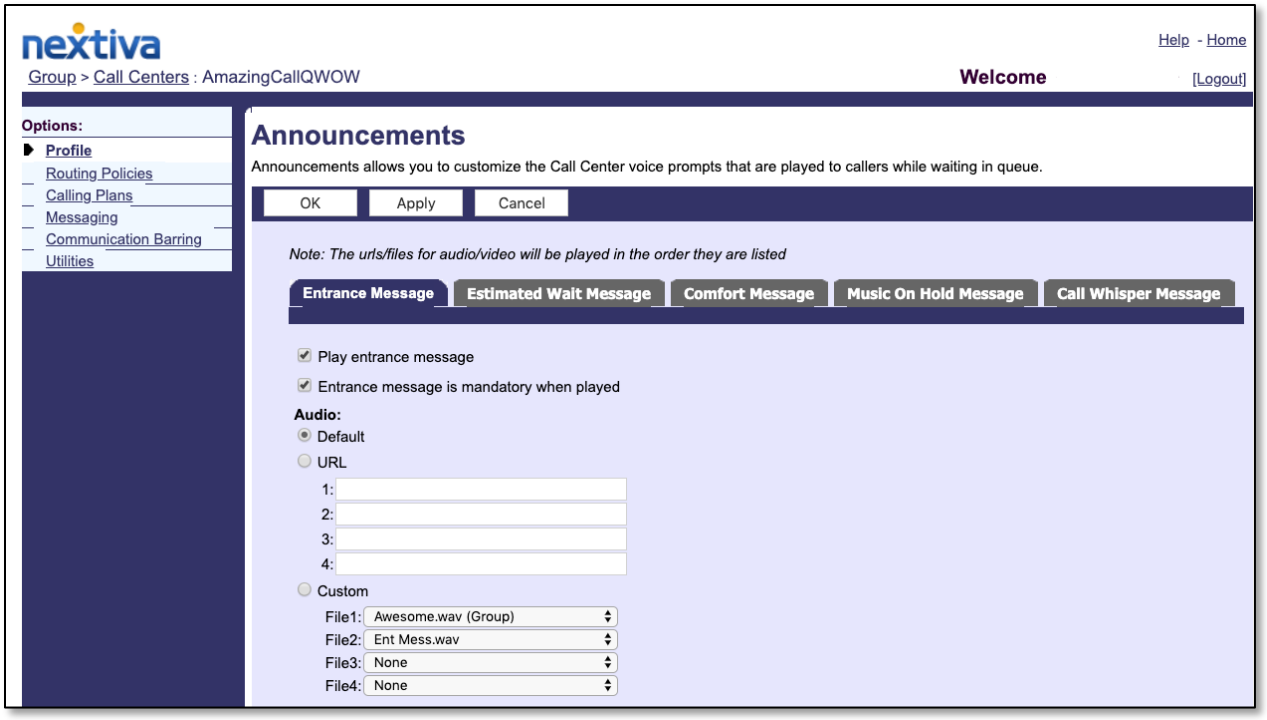

Entrance Message: This is the initial message(s) a caller hears when they enter the queue. There is an option to make the Entrance Message mandatory, which can be useful to let callers know they will be recorded, for example. Multiple files can be configured to play one after the other under the Custom settings.

After the Entrance Message, and in between any Comfort Messages, callers will hear the Music on Hold option selected.

For this section, we are configuring messages for a specific Call Center queue. To configure messages based on a phone number (or group of phone numbers), please see the DNIS section.

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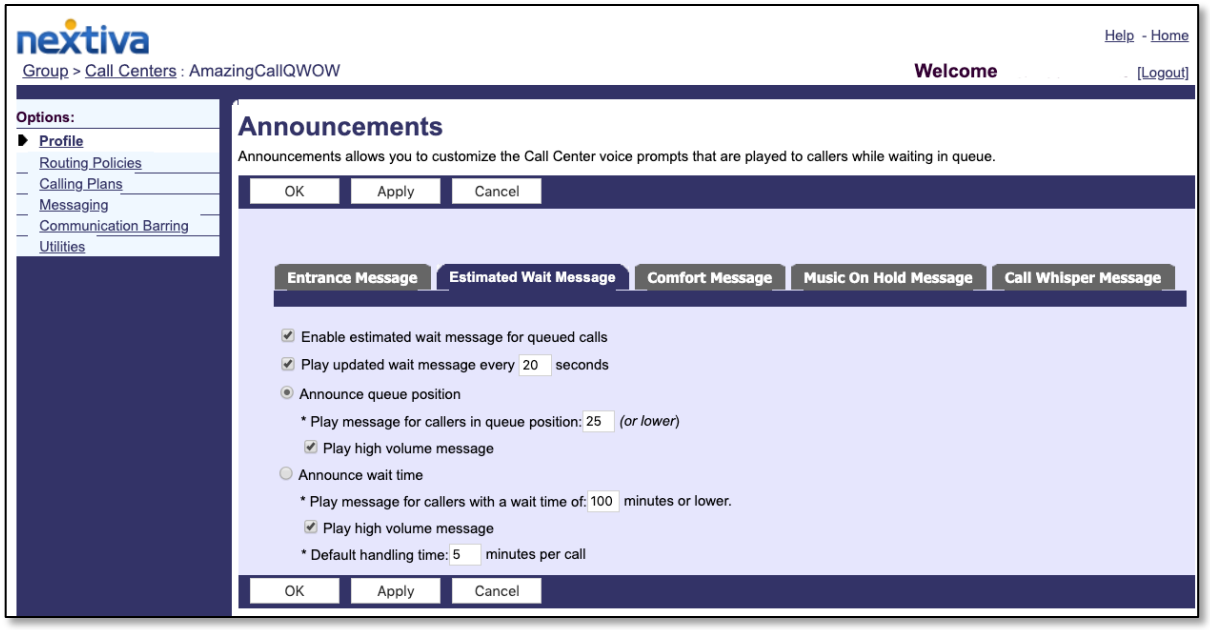
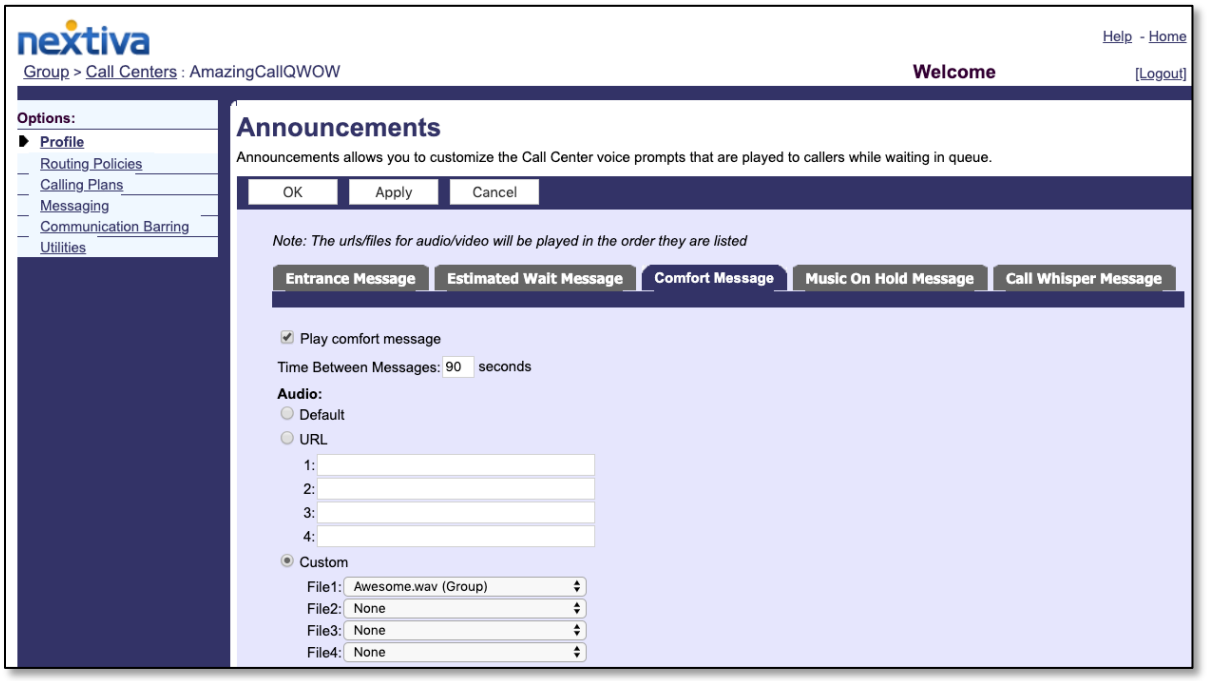


Estimated Wait Message: Callers waiting in a queue can hear either 1) Position or number in the queue OR 2) The estimated amount of wait time. Each queue can be customized based on need. Thresholds can be set so callers facing extreme wait times are not alerted (to help prevent Abandoned calls). The messages callers hear in this section may not be customized and are automated when activated.



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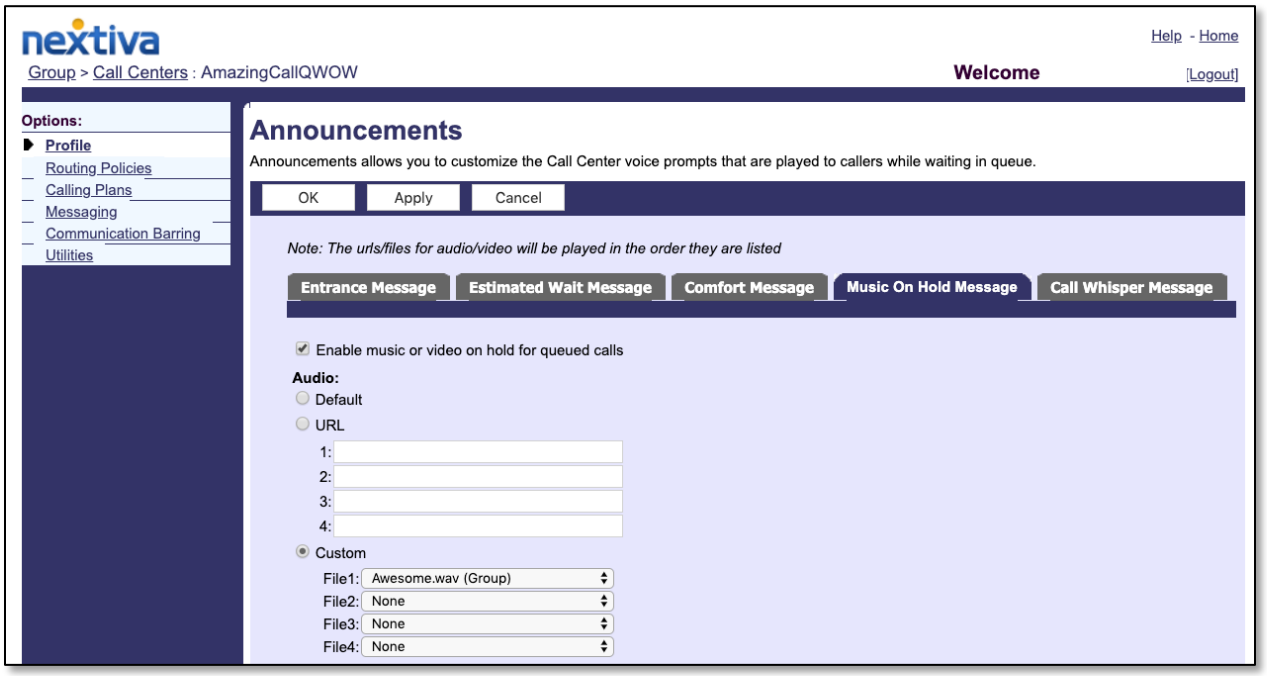
Comfort Message: Periodically while a caller waits for a live agent, they may be prompted to listen to various greetings, which can all be customized. The intent is to comfort the caller to ease their wait in the queue. Often these messages are used to convey important company details, information for the caller, specials and promotions, or any other information. Comfort messages are completely customizable and can be set up to play multiple files in sequence. After the Entrance Message, and in between any Comfort Messages, callers will hear the Music on Hold option selected.



Music On Hold Message: By default, there will be a Music on Hold system file (default and generic) that can be selected. To add a custom file, upload it to the Announcement Repository for the Call Center queue. It will then be available within the drop-down menu under Custom.

> NOTE: Music on Hold will always start at the beginning of the music file when a caller is placed on hold, and in between any Comfort Messages.

> NOTE: To add custom messages or greetings to be heard during Music on Hold, splice files or embed messages periodically throughout the file.

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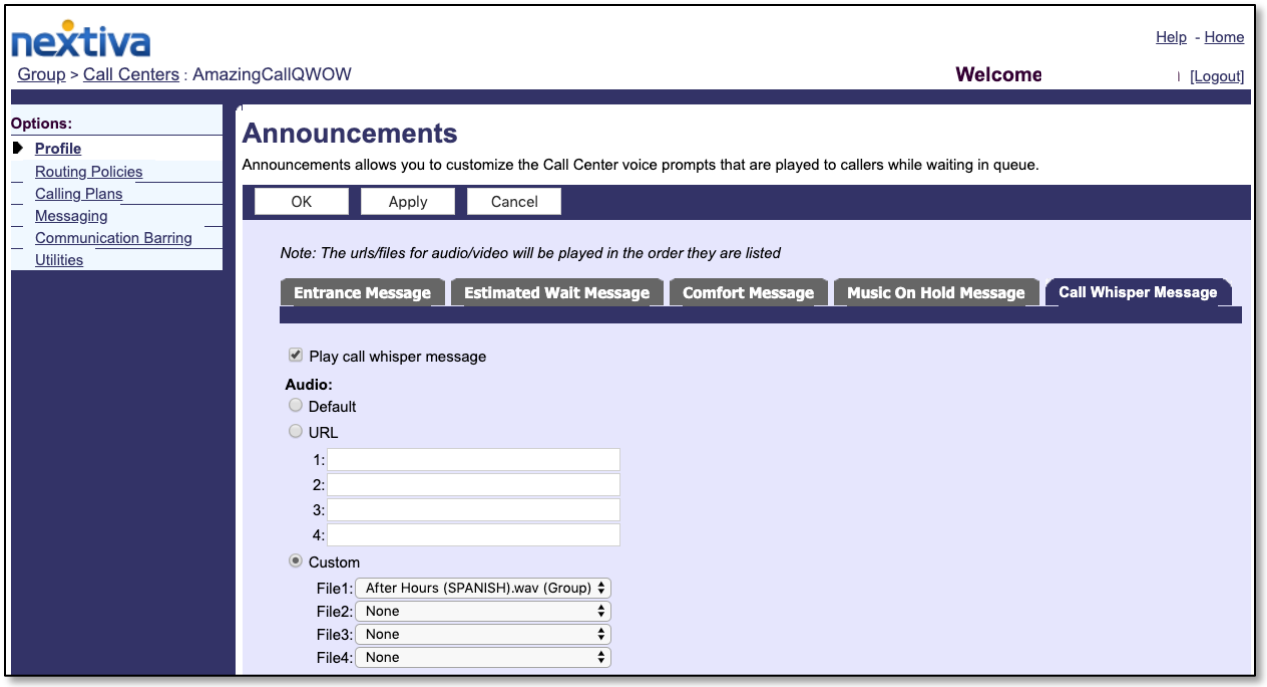

Call Whisper Message: Nextiva Call Whisper offers Administrators the opportunity to customize what an Agent hears while receiving a new caller from a queue. Call Whisper is a pre-recorded message uploaded to the Announcement Repository. It plays to the Agent as the caller exits the queue (the caller cannot hear the message).

Call Whisper is especially helpful to convey new information to an Agent (i.e., new customers are 10% off today), clarify the type of call (i.e., billing versus sales), or to encourage behavior (i.e., smile when you talk).

DNIS (Dialed Number Identification Service)

The Dialed Number Identification Service (DNIS) allows Call Center Administrators to associate multiple phone numbers to a queue for tracking or to play specific messages for those callers. With DNIS, two different callers within the same queue could have vastly different experiences – including different music on hold and wait times.

DNIS can reduce the number of queues needing to be set up, while still prioritizing certain callers if desired. Callers to designated DNIS numbers can be prioritized over other callers in the same queue, such as VIP customers or those nearing cancellation, for example.

Lastly, DNIS is often used to track call traffic from marketing campaigns or advertising endeavors, by assigning each campaign with a unique phone number for reporting.

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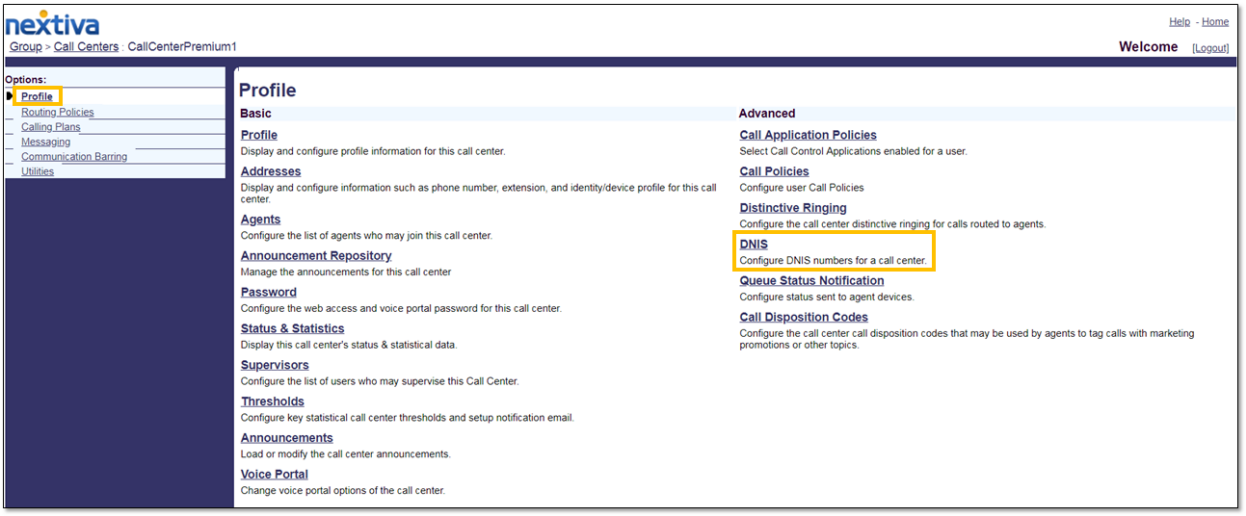
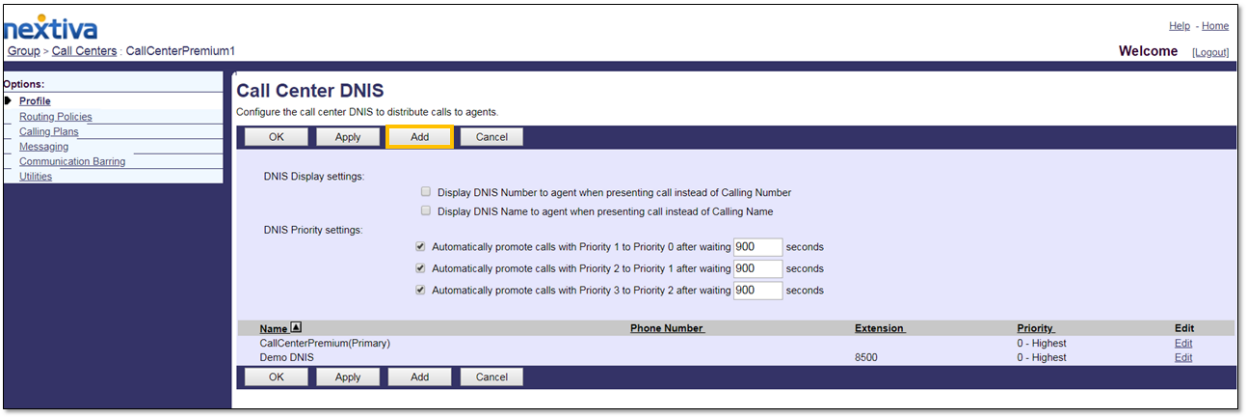
Setting up DNIS is as simple as adding a phone number. From the **Profile** main page, click **DNIS** under Advanced.



Click **Add** to start the setup process. Any existing DNIS phone numbers already set up on this queue are listed at the bottom of the screen.

> NOTE: Although DNIS can be configured as an extension only, to utilize all the benefits, there should be unassigned phone numbers on the account that can be used to set up this feature.



On the **Configure DNIS** tab, fill in the required fields, including a unique DNIS Name (only visible to internal users). Assign a phone number (minimum requirement is an extension). Since each DNIS number can have a unique priority, select the rating (zero is highest). This priority is attached to incoming calls received on this DNIS number, and calls are distributed to Agents based on their priority. In the Calling Line ID field, enter the Calling Line ID.

To use a custom name for the DNIS **Calling Line ID**, check **Use custom Calling Line name settings** and enter the custom calling line first and last name in the **Calling Line ID Last Name**

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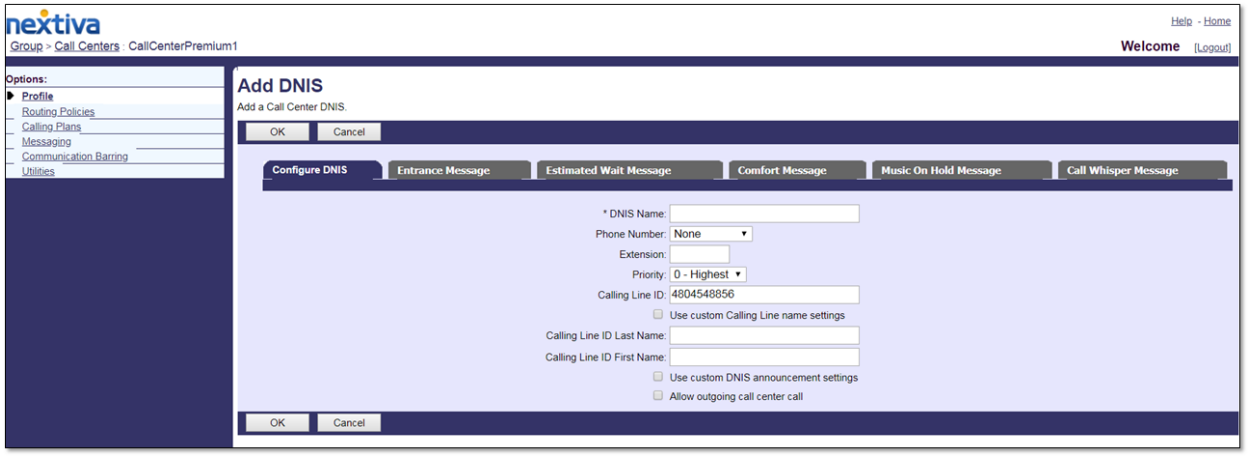
and Calling Line ID First Name boxes. Calling Line ID is the caller ID name that is visible to the agent receiving the call. This is especially useful if the Agent is part of multiple groups or queues and needs to identify how the caller is reaching him or her.

The Use custom Calling Line name settings option determines whether the DNIS level caller ID values override the call center level caller ID name values. If the option is enabled, the DNIS Calling Line ID Last Name and the DNIS Calling Line ID First Name are used for all outgoing calls. If the option is disabled, the Call Center's caller ID last and first name are used instead.

To use custom announcement settings, check Use Custom DNIS announcement settings.

To allow outgoing calls using this DNIS number, check Allow outgoing call center call.



Click OK to save and submit. To customize the Announcements specific to this DNIS addition, access the tabs to the right of Configure DNIS: Entrance Message, Comfort, etc.

Call Center: Routing Policies Page

Next, in this section we'll explore the Call Center Routing Policies main page.

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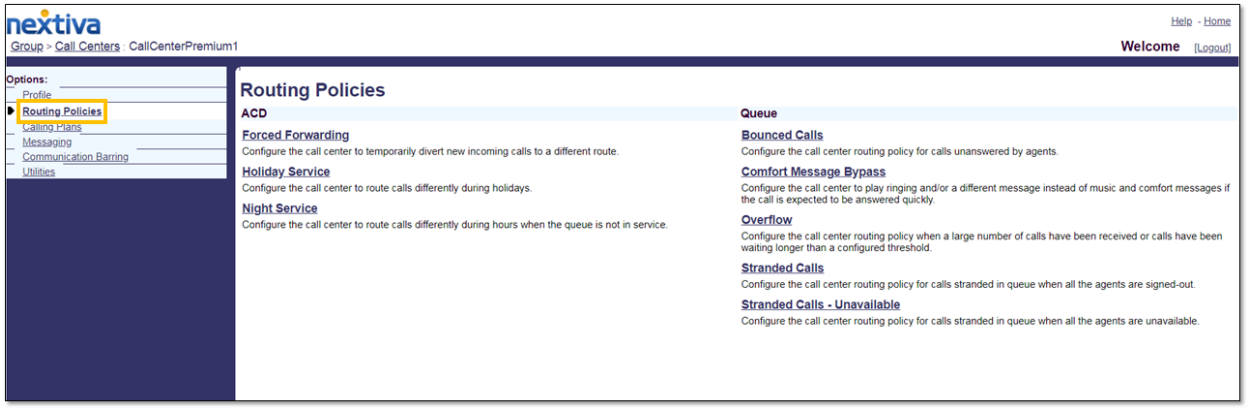
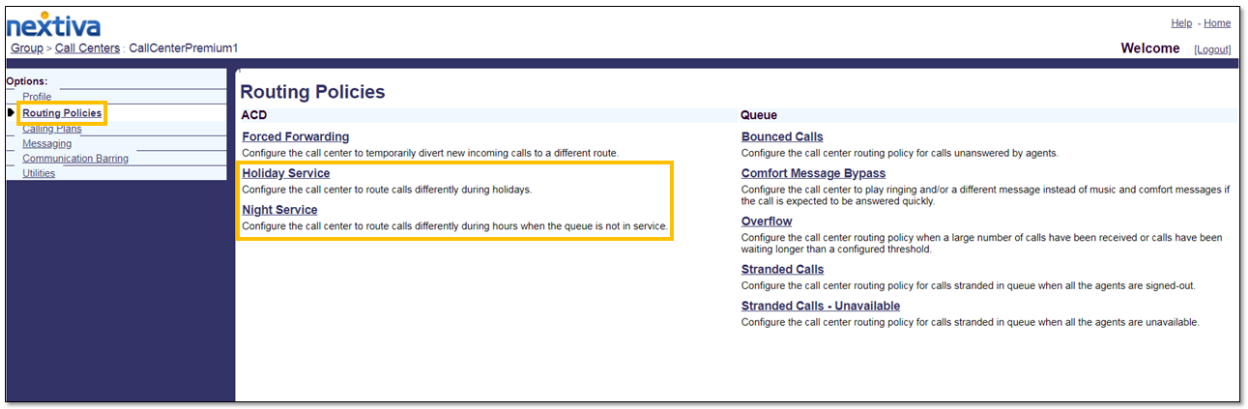


Routing Policies can also be set up to route callers during closed times or even times of extreme traffic. Let's explore some common options for routing.

Night & Holiday Service

To configure after hours routing, select Routing Policies > Night Service or Holiday Service.



Configure the Call Center to route calls differently during hours when the queue is not in service. This is determined by a schedule that defines the business hours of the queue. Better track calls that come in when the business is closed, and uniquely route calls when the Call Center queue is not in service, based on Night and Holiday Schedules. Customize messaging so callers know when the business is closed and options for contact.

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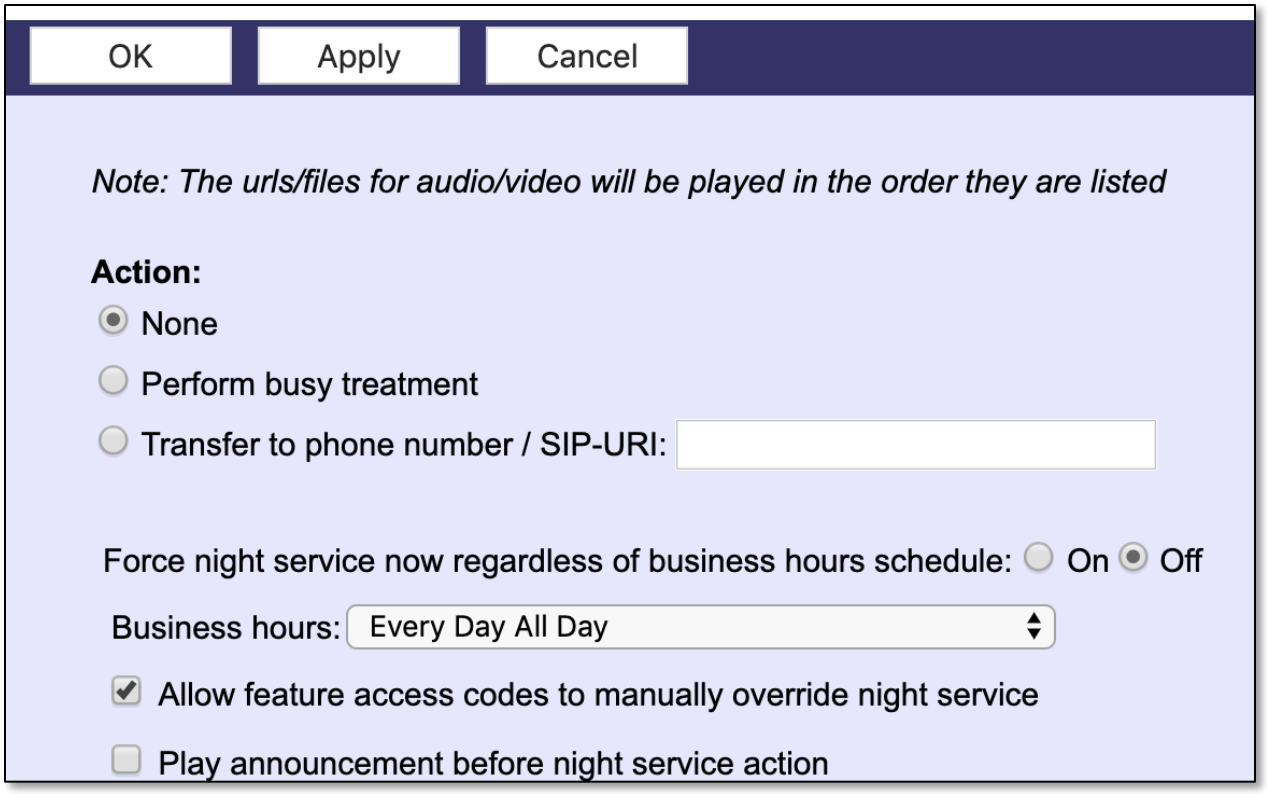

Action: Choose which option to follow when Night Service is activated.

Example: Transfer to phone number "480-999-8888" (after hours answering service).

Example: Transfer to phone number "101" (receptionist extension with Voicemail set up).

Business hours: Assign a pre-configured schedule to the Night Service. Custom announcements may also be set up on this screen.

Call Center: Bounced Calls

For Administrators looking to route calls that have been unanswered by Agents, a Bounced Call policy is always recommended.

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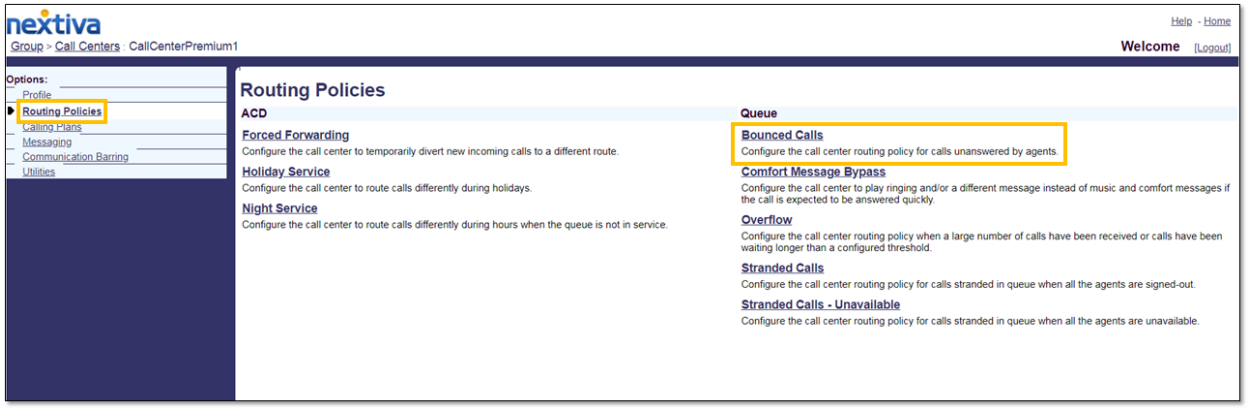
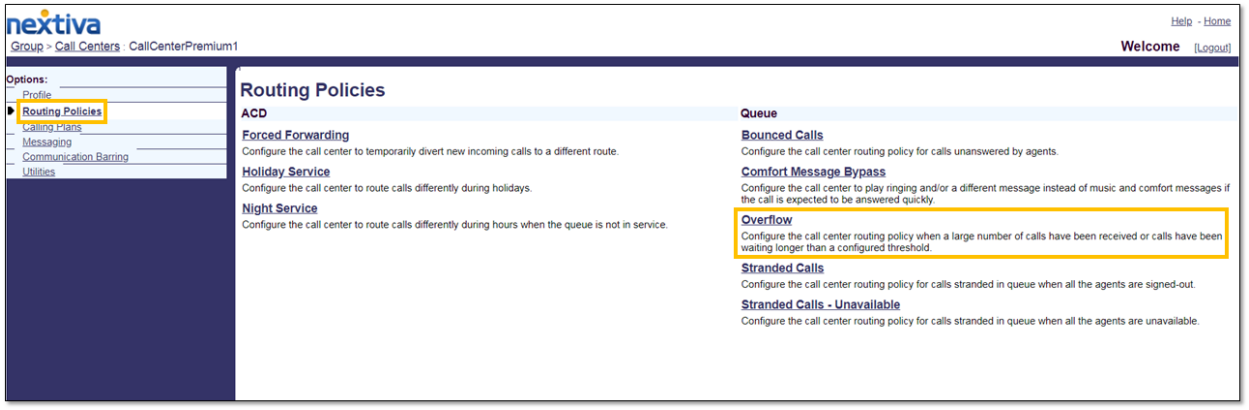


If an Agent forgets to change their ACD status and leaves their station, even though they are set to “Available” in the queue, they are not currently able to answer calls. Calls that come into that Agent will be unanswered or "Bounced". Bounced Call routing must be customized to prioritize Bounced Calls over other callers in queue. This configuration screen also allows Administrators to limit the number of calls an Agent can be delivered in this status.

Call Center: Overflow Routing

Configure a Call Center Overflow routing policy when many calls have been received or calls have been waiting longer than a configured level.



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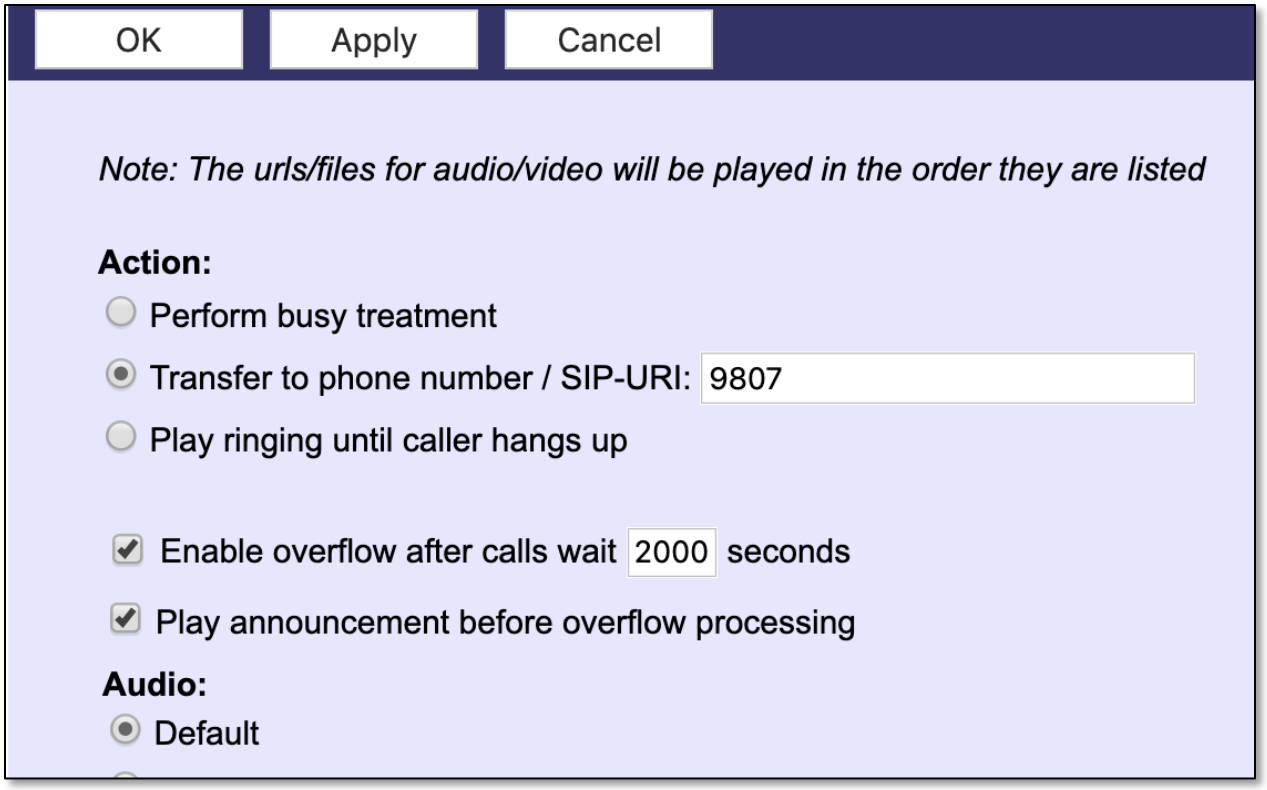

Callers can hear custom messaging, be routed to Voicemail, or be routed to a phone or extension number.

NOTE: For more options, such as Queue-for-Me waiters, see Nextiva Advanced IVR.

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