



NEXTIVA UNITY
DESKTOP
Getting Started User Guide

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1 Introducing Nextiva Unity

Nextiva Unity is a Microsoft® Windows® based application that enhances your hosted VoIP environment to provide call control, directory integration, instant messaging and service configuration. Featuring an intuitive icon-based interface, Nextiva Unity provides point-and-click call control within the familiar desktop environment. Nextiva Unity improves workgroup collaboration by bringing users closer to each other and simplifying internal and external communication.

1.1 System Requirements

1.1.1 Hardware & Operating System

Nextiva Unity is currently supported on Windows 7 and above, with the Microsoft .NET framework version 2.0 or above installed. The hardware requirements to run Nextiva Unity are less than those to run Windows, although 2GB of memory or greater is recommended.

1.1.2 Internet & Firewall

Nextiva Unity requires high-speed internet connectivity [dial-up is not supported] and access to the below locations, which may require firewall rules to be added on the customer premises:

- TCP port 2208 to im.unityclient.com
- TCP port 2208 to the NextOS platform
- HTTP/HTTPS access to portal.unityclient.com

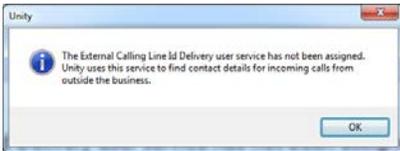
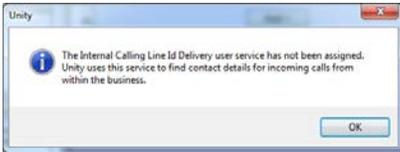
1.2 Service Assignment Requirements

1.2.1 Mandatory Services

The Client Call Control service is mandatory, as this is the service that allows Nextiva Unity to integrate with the NextOS platform. If this service is not assigned, the user will be alerted and Nextiva Unity will not provide any functionality.



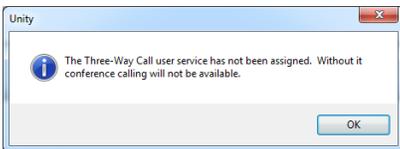
The Internal Calling Line ID Delivery and External Calling Line ID Delivery services should both be assigned, as these services allow Nextiva Unity to identify calls to/from other users in the business. If not assigned, Nextiva Unity will function, but the user will be alerted that this functionality will not be available.



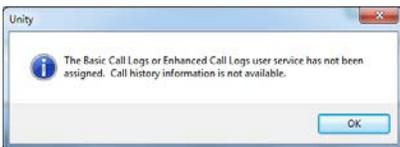
The Call Transfer service is required in order to blind or announce transfer calls to internal and external numbers. Nextiva Unity will alert the user if this service is not assigned.



Either the Three-Way Calling or N-Way Calling service must be assigned to provide conferencing functionality, Nextiva Unity will alert the user if neither service is assigned.



Either Basic Call Logs or Enhanced Call Logs must be assigned to the user in order to see dialled, received, and missed calls. Nextiva Unity will alert the user if neither service is assigned.



1.2.2 Optional Services

Nextiva Unity allows many user services to be utilized and configured through the main User Interface (using My Status for example) or through Settings . However these services are not mandatory, so Nextiva Unity will remove visibility of them if not assigned to the user. The below services are supported:

| Service | Description |
|--------------------------|---|
| Anonymous Call Rejection | Prevent a caller from contacting you if they have explicitly hidden their phone number. |
| Call Forward Always | Automatically forward all incoming calls to a number |
| Call Forward Busy | Automatically forward all incoming calls to a number when the |

| | |
|------------------------------------|---|
| | user is on the phone. |
| Call Forward No Answer | Automatically forward all incoming calls to a number when the call hasn't been answered after a certain number of rings |
| Call Recording | Record inbound and outbound calls |
| CommPilot Express | Use pre-configured routing profiles to handle incoming calls based on the current state of the user |
| Do Not Disturb | Block all incoming calls. They will be routed to voicemail if available |
| Simultaneous Ring | Automatically ring another number when an incoming call is received, the call can then be answered through that number or the primary phone |
| Calling Line ID Delivery Blocking | Hide your phone number when making outgoing calls |
| Nextiva Anywhere | Connect mobile or fixed-line devices to the NextOS account, and switch calls between them |
| Nextiva Mobility | Associate a mobile device with the NextOS account to make or receive calls |
| Call Transfer | Transfer calls to internal or external numbers |
| Call Waiting | Answer an incoming call when already on a call |
| Directed Call Pickup With Barge-In | Answer an incoming call to another user |
| Hoteling Guest | Associate the NextOS account with another device so that it is treated as the primary device. Used in a hot-desking environment |
| Remote Office | Associate a mobile device with the NextOS account to make or receive calls |
| Shared Call Appearance | Control multiple devices for the same NextOS account |
| Voice Messaging User | Provide voicemail for unanswered incoming calls |

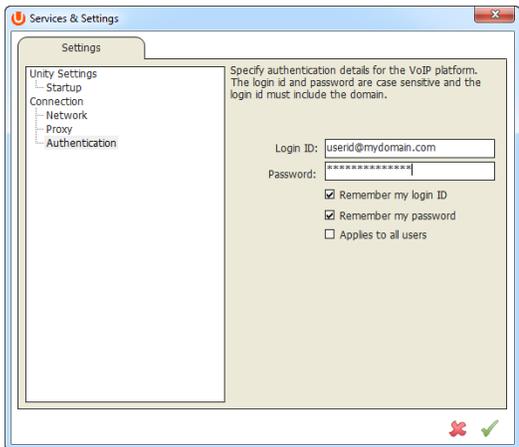
2 Initial Configuration

Nextiva Unity requires an initial configuration in order to communicate with Nextiva's NextOS platform. The first time Nextiva Unity is started, you will be prompted to enter the configuration details, as shown below. Nextiva Unity can then retain the connection and authentication details for later use.

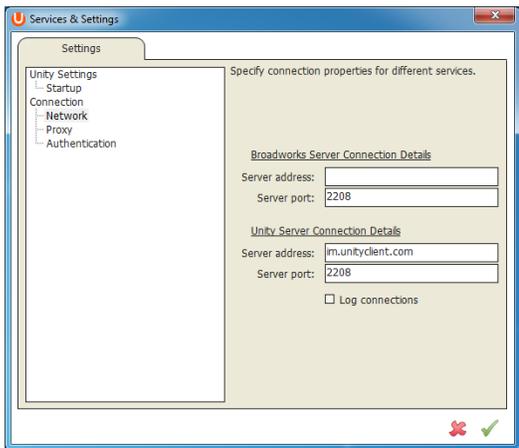


To do this, follow the below steps:

1. Enter your Login ID and password as specified by Nextiva. In some cases the domain may not be required, and Nextiva will confirm if this is the case. You can also set Nextiva Unity to use the same details each time Nextiva Unity is started, which is the default behaviour and recommended in almost all scenarios. In some situations (such as in a hot-desk environment where desks and phones are shared by mobile staff members) you may want all users to use the same authentication details, regardless of who is logged into Windows. The "Applies to all users" setting will provide this functionality.



2. Now select Connection > Network from the list on the left to confirm the connectivity details, as shown below.



3. Enter the Nextiva Server Connection as specified by Nextiva. In some cases this will already be supplied, in which case it does not need to be changed. The Nextiva Unity Server address should always be pre-populated, but please contact Nextiva if this is not the case.

4. To complete and save your settings, click the green check mark in the bottom right corner.

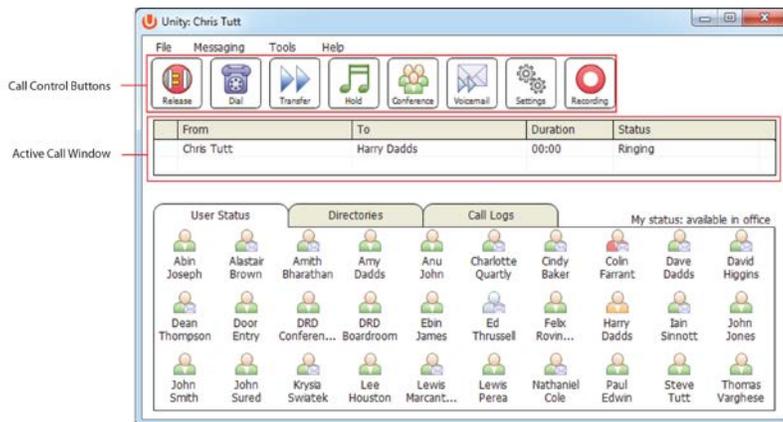
Nextiva Unity will now display a dialogue box "Logging into Nextiva" as the application opens.

3 The Nextiva Unity User Interface

Nextiva Unity is split into three functional areas; Call Control, Current Call List, and Productivity Tabs. The Productivity tabs are further split into User Status, Directories, and Call Logs.

The Current Call List will display the status of all current calls for the logged in user, which are controlled using the Call Control buttons. These call control buttons will change based on the status of the call.

The User Status list will automatically populate with 8 or 30 random users in your group or enterprise when Nextiva Unity first starts, depending on Nextiva Unity license assignment.

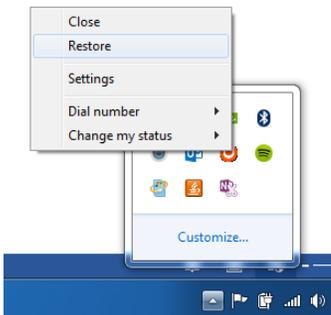


3.1 Resizing Nextiva Unity

Nextiva Unity can be dragged from the bottom right corner to the required size. The Current Call List resizes independently by dragging the border at the bottom of the list (where the lower red line is in the illustration above). When Nextiva Unity is closed, all current dimensions will be saved.

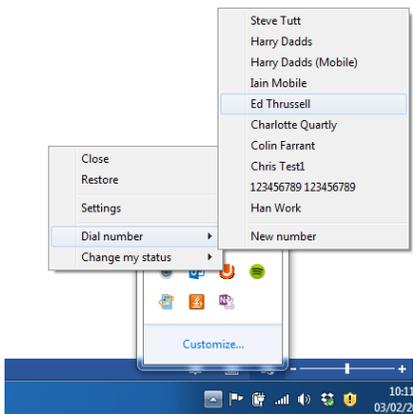
3.2 Maximizing and Minimizing

Nextiva Unity can be maximized and minimized using the standard buttons in the top right hand corner of the application. When minimized, Nextiva Unity appears in the system tray in the bottom right hand corner of the desktop where the Nextiva Unity icon  will be displayed. To re-open Nextiva Unity, simply double-click this icon, or right-click and select "Restore" from the menu, as shown below.



3.3 Using Nextiva Unity from the System Tray

In its minimized state, Nextiva Unity offers the ability to change My Status profiles, edit Settings & Preferences and make a call. Right-click the Nextiva Unity icon  in the system tray to open the menu and left click to select. When making a call, the last 10 numbers can quickly be selected to redial, as shown below.

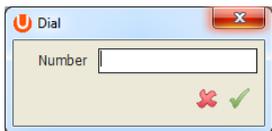


4 Call Control

All calls are managed through the call control buttons at the top of the application. These buttons will change depending on the state of the selected call, or the only call if there is only one call in the current call list. For example the Answer/Release   and Hold/Retrieve   buttons switch, as only one of these options will be valid at any given time. When an inbound call is ringing, Answer becomes the valid option. Once the call is active, the icon will switch to Release as hanging up is the only valid option.

4.1 Make a Call

Click the Dial button  to bring up the Dial dialogue box, as shown below.



Enter the number on the PC keyboard and click the green check mark to place the call. The desk telephone will default to using hands-free speakerphone. If the telephone does not support speakerphone, you will need to lift the handset when the call is answered.

4.2 End a Call

Click the Release button  to end the currently selected call. If there are multiple calls in the current call list, make sure you select the right call before clicking Release.

Note: Replacing the phone handset will also end the call, which will then be remove the call from the current call list.

4.3 Redial

You can also right-click the Dial button to see a list of the last 10 dialled numbers. Simply click on an entry to dial the contact, as shown below.



4.4 Answering a Call

When Nextiva Unity displays an inbound call, click the Answer icon  or double-click the call in the Current Call List to answer the call. Your desk phone will now be on hands-free speakerphone, if it supports this feature with Nextiva Unity. If there is an active call in progress, you will need to click the new inbound call in the Current Call List before clicking Answer. This will automatically place the first call on Hold. Please note that answering a call by lifting the handset on the desk phone will have the same effect as clicking Answer in Nextiva Unity.

4.5 Send Call to Voicemail

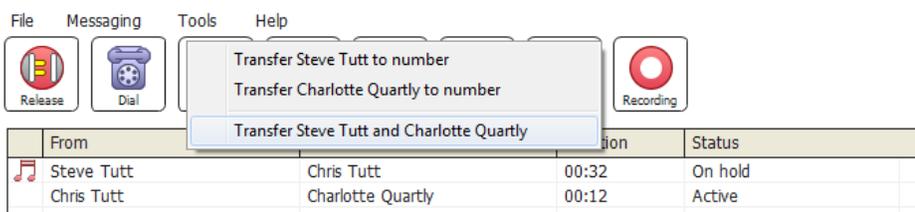
To send an inbound call directly to your voicemail click, the Voicemail button . Please note that if voicemail is not assigned or is disabled, the button will still be visible but inactive.

4.6 Transferring a Call

There are two ways to transfer a call; Announced Transfer, where you introduce the caller to the receiving party before putting the call through, and Blind Transfer, where you transfer the caller directly to a recipient without introducing the call.

4.6.1 Announced Transfer

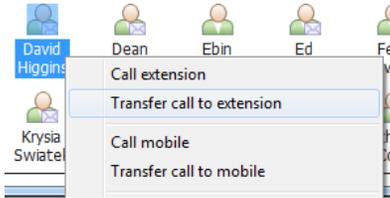
Receive and answer an inbound call. Make a new call to the desired destination extension, either by clicking Dial , double-clicking an available colleague  in User Status or double-clicking a Group Directory or Personal Directory entry. This will automatically place the first caller on Hold and will initiate a new call in the Current Call List. Once the called party answers, click Transfer  and select the context menu option to connect both calling parties together. Both calls will now disappear from the Current Call List.



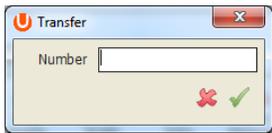
If you have multiple active calls, make sure you first select the calls you wish to connect together by clicking on them (using the CTRL key) in the Current Call List. If there are only two calls in the list then this is not required.

4.6.2 Blind Transfer

While on an active call, right-click the recipient in either User Status, Directory, or Call Logs and select either Transfer call to extension or Transfer call to mobile (if present in the user profile). This will send the caller directly to the destination number. The original call will now disappear from the Current Call List.

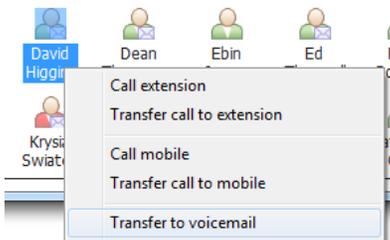


To blind transfer the call to a new number, select the call from the Current Call List and click Transfer . This will bring up a Transfer Call dialogue box. Enter the destination number and click the green check mark or press Enter. The call will be transferred and will disappear from your Current Call List.



4.6.3 Transfer to Voicemail

The option to Transfer to voicemail is valid only for internal company users that have Voicemail assigned and activated. While on an active call, right-click a user in the User Status list and select Transfer to voicemail. This will send the selected call directly to the destination extension voicemail without introducing ringing.

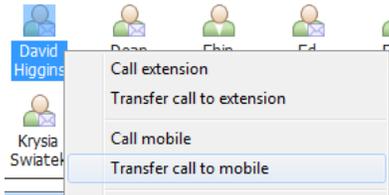


4.6.4 Transfer to Mobile

If the destination user has a mobile number entered as part of their profile in Nextiva, you have the option to right-click and select either Dial Mobile or Transfer Call to Mobile.

To announce the call, click Dial Mobile. Once the recipient answers, click Transfer  and select the context menu option to connect the calls together.

To blind transfer the call without introduction click Transfer call to mobile



Note: If the user does not have a mobile number entered as part of their Nextiva user profile, the Call mobile and Transfer call to mobile options will not be displayed.

4.7 Call Hold

The Hold/Retrieve   function switch depending on the status of the currently selected call. Hold is only available for an active call, while Retrieve is only a valid option for a call currently on Hold. When a call is on Hold, the red Hold icon is shown in miniature to the left of the call in the Current Call List, as shown below.

| | From | To | Duration | Status |
|---|---------------|------------|----------|---------|
|  | Barry Simpson | Chris Tutt | 00:10 | On hold |
| | | | | |

4.7.1 Placing a Call on Hold

To place a current active call on Hold, press the red Hold button . The call status will now show as on hold in the Current Call List, and there will be an On Hold icon alongside the call.

4.7.2 Retrieving a Held Call

Click the held call in the Current Call List to select it. Click the Retrieve button  to take the call off hold. You can also double-click the call to retrieve it. Please note that any other active calls will be placed on hold before the selected call is retrieved, meaning you can switch between calls by double-clicking them in the Current Call List.

4.8 Conference Calling

A conference call can be established with any combination of internal and external numbers. The total number of parties that can be supported is determined by service assignment. The Three-Way Calling user service supports conference calls with two other parties only while the N-Way Calling user service supports conference calls with more participants.

4.8.1 Starting a Conference

Once an active call is established (that you have either made or received), call a second person. You can do this by clicking the Dial button  or double-clicking a user in User Status, Directories or Call Log lists. Making this call will automatically place the first caller on Hold. Once the second party has answered the call, click the Conference button  and a new conference will be created between you and the other two parties. This is represented in the Active Call List as shown below.

| | From | To | Duration | Status |
|--|--------------|---------------|----------|---------------------|
| | Andrew Smith | Chris Tutt | 00:54 | Active (conference) |
| | Chris Tutt | Barry Simpson | 00:06 | Active (conference) |

Selecting either call and clicking Hold will place the conference call on hold, during which time the other callers can still talk to each other.

| | From | To | Duration | Status |
|--|--------------|---------------|----------|----------------------|
| | Andrew Smith | Chris Tutt | 01:38 | On hold (conference) |
| | Chris Tutt | Barry Simpson | 00:50 | On hold (conference) |

Please note that conference calls can be started with any two remote calls, regardless of the direction of either call or if the number is internal or external (for example between two mobile calls).

4.8.2 Ending a Conference

To remove a caller from the conference call but continue speaking to the other caller, simply select the call to release in the Current Call List and click the Release button as you normally would. This will release the selected party (thereby ending the conference call) and will show only the remaining party in the Current Call List, as shown below.

To end the conference call and disconnect both parties, simply hang up the phone or select both calls and select Release .

4.8.3 Leaving a Conference

If you want to leave a conference call that you started but want the remote calls to continue speaking to each other, perform a transfer with announce (as described in section 4.6.1) between the two calls.

| | From | To | Duration | Status |
|--|--------------|---------------|----------|---------------------|
| | Andrew Smith | Chris Tutt | 00:28 | Active (conference) |
| | Chris Tutt | Barry Simpson | 00:17 | Active (conference) |

The calls will then be removed from the Current Call List, but will be able to continue the call without you.

4.8.4 Adding a Call to an Existing Conference

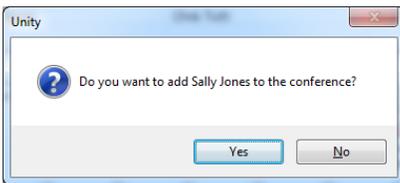
If the N-Way Calling user service is assigned, additional calls can be added to an existing three-way conference. The three-way conference call (with two other parties) must already be in progress. You can then answer an inbound call or dial another party (both actions will place the existing conference on hold).

| | From | To | Duration | Status |
|---|---------------|------------|----------|----------------------|
|  | Barry Simpson | Chris Tutt | 00:41 | On hold (conference) |
|  | Andrew Smith | Chris Tutt | 00:34 | On hold (conference) |
| | Sally Jones | Chris Tutt | 00:20 | Active |

Now click the Conference button  to add the selected call into the conference. Once added, the Current Call List will show all calls in the conference.

| | From | To | Duration | Status |
|---|---------------|------------|----------|---------------------|
|  | Barry Simpson | Chris Tutt | 01:29 | Active (conference) |
|  | Andrew Smith | Chris Tutt | 01:22 | Active (conference) |
|  | Sally Jones | Chris Tutt | 01:08 | Active (conference) |

If a call is not selected when you press the Conference button, , then you may be asked to confirm that you wish to add the caller into the existing conference, as shown below.



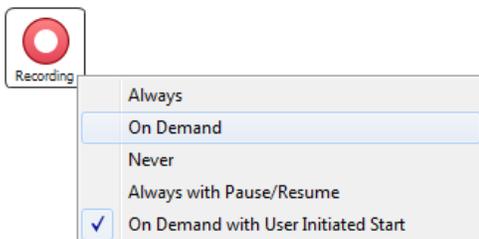
Calls can be added to or removed from the conference, and the conference can be held and retrieved as normal.

4.9 Call Recording

If the Call Recording User service is assigned then the user may be able to manage call recording, although this depends on the functionality offered by the NextOS platform and service configuration parameters. If this service is not assigned, then the Call Recording button  will not be displayed in the main window.

4.9.1 Changing the Call Recording Option

Right-click the Recording button to select the call recording option, as shown below. Please note that depending on permissions this may not be available.



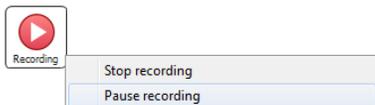
Call Recording options are:

| Option | Description |
|-------------------------------------|--|
| Always | 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 from the start, but recording can be started at any time during the call, in which case the entire call will be recorded. Stop and pause are not available with this option. |
| Never | Calls are never recorded and recording cannot be started while a call is in progress. |
| Always with Pause/Resume | All calls are automatically recorded from the beginning of the call, but recording can be paused and resumed, which is especially important when taking credit card details over the phone (that need to be omitted). This will still result in a single recording for the call, regardless of how many times it was paused and resumed. |
| On Demand with User Initiated Start | Calls are not automatically recorded from the start, but recording can be started at any time. However, any conversation before the recording was started will not be included in the recording. Recording can be paused and resumed, which will result in different recordings being created for a single call. |

4.9.2 Controlling Call Recording

You can start, stop, pause and resume call recording depending on the Call Recording Option currently selected. Left-click the Recording button to manage recording for the selected call in the Current Call List, the options will change dynamically depending on the current recording state of the call.

Click the Record button  to start recording. The image will change to reflect the new state . Once a call is recording (depending on the Call Recording Option), click the Recording button  to pause or stop, as shown below.



Depending on the option selected the Recording button will change to reflect the new state, which will be paused  or stopped . Click the Recording button again to continue/restart recording the call.

5 Current Call List

The Current Call List gives visual representation of the status of all calls for the logged in user. This includes the caller (From), number called (To), Duration, and hold/active/ringing Status. Where the calling number (From) is matched to a contact within a directory (Group/Enterprise, Personal Directory, Outlook etc), the caller name, rather than number, will be displayed.

| | From | To | Duration | Status |
|---|---------------|--------------|----------|---------|
|  | Barry Simpson | Chris Tutt | 00:35 | On hold |
| | Chris Tutt | Andrew Smith | 00:09 | Active |
| | Sally Jones | Chris Tutt | 00:00 | Ringin |
| | | | | |

The number called (To) field will display the user name, destination extension, Call Center, or Hunt group that has been called to enable the call to be answered appropriately. This includes the call center (DNIS) queue name if applicable, as shown below.

| | From | To | Duration | Status |
|--|---------------|-------------|----------|----------------------|
| | Barry Simpson | Bolts Sales | 00:00 | Ringin (redirection) |
| | | | | |
| | | | | |

5.1 Managing Multiple Calls

To manage a particular call, first select it by clicking it in the Current Call List. If there is only one call in the list, it will be selected automatically. You can then use the call control buttons to perform different actions on the call. There is no limit to the number of calls that can be displayed in the Current Call List. This is limited by the number of simultaneous calls allowed, and if the Call Waiting user service is assigned and active.

You can also double-click an incoming (unanswered) call to answer it, or to retrieve it if currently on hold.

5.2 Resizing the Current Call List

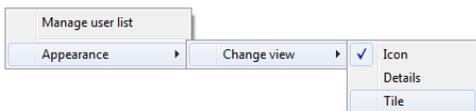
The bottom border of the Current Call List can be dragged down to display as many or as few calls as necessary. Nextiva Unity will save these dimensions when closed.

6 User Status

The User Status tab gives a visual indication of the status of users (within the group/enterprise) that are currently being monitored. When Nextiva Unity first loads, this list is automatically populated with the maximum number of users depending on the Nextiva Unity license assigned; if you are using a Nextiva Unity Lite license this is limited to 8 users, but all other Nextiva Unity licenses will support up to 30 monitored users.

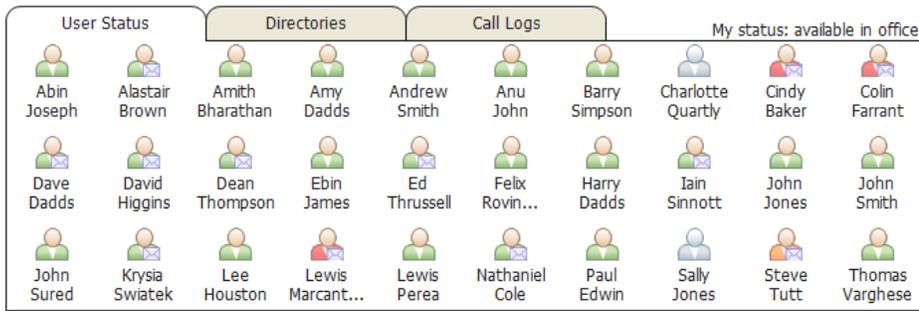
6.1 User Status Views

There are three different views available, as outlined below. Right-click anywhere in the list to change the view.



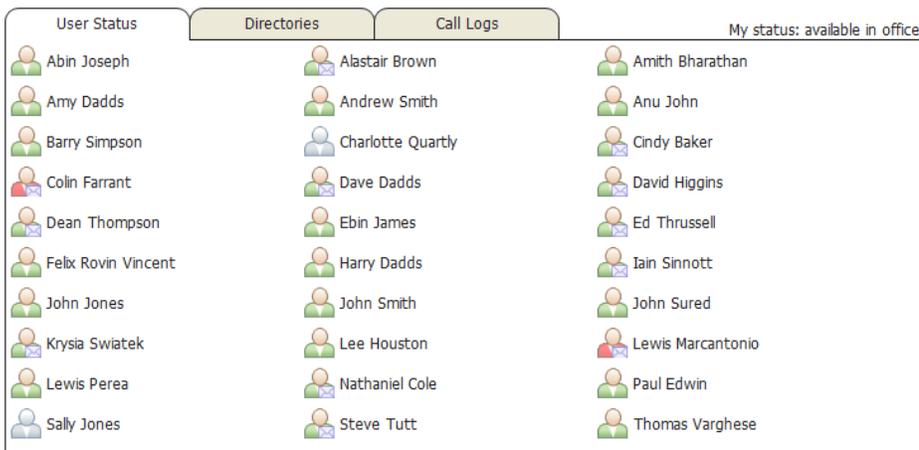
6.1.1 Icon View

This view combines a simplified look and space reduction.

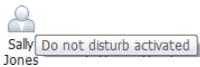


6.1.2 Tile View

This view is similar to Icon view, but uses more white space to provide a cleaner look.



In both the Icon and Tile views, hovering the mouse over the image will provide more information about the monitored user, for example their service configuration:



Or call status (if permitted):



6.1.3 Detail View

This view provides by far the greatest amount of detail, but requires more space (although the list can be shortened, in which case scrollbars will automatically appear).

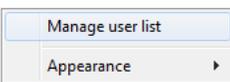
| User Status | | Directories | Call Logs | My status: available in office |
|---------------------|-------------|-------------|-----------|--------------------------------|
| User Name | Department | Status | | |
| Abin Joseph | | | | |
| Alastair Brown | | | | |
| Amith Bharathan | | | | |
| Amy Dadds | | | | |
| Andrew Smith | | | | |
| Anu John | | | | |
| Barry Simpson | | | | |
| Charlotte Quartly | Sales South | | | Unavailable profile activated |
| Cindy Baker | | | | |
| Colin Farrant | | | | Talking to Lewis Marcantonio |
| Dave Dadds | | | | |
| David Higgins | | | | |
| Dean Thompson | | | | |
| Ebin James | | | | |
| Ed Thruswell | | | | |
| Felix Rovin Vincent | | | | |
| Harry Dadds | | | | |
| Jain Sinnott | | | | |
| John Jones | | | | |
| John Smith | Sales South | | | |
| John Sured | | | | |
| Krysia Swiatek | Sales South | | | |
| Lee Houston | | | | |
| Lewis Marcantonio | Sales South | | | Talking to Colin Farrant |
| Lewis Perea | | | | |
| Nathaniel Cole | | | | |
| Paul Edwin | | | | |
| Sally Jones | | | | Do not disturb activated |
| Steve Tutt | Sales South | | | |
| Thomas Varghese | | | | |

With this view, the sort order for each column can be set, which is saved when Nextiva Unity is closed. You can also configure Nextiva Unity to display or hide the department column.

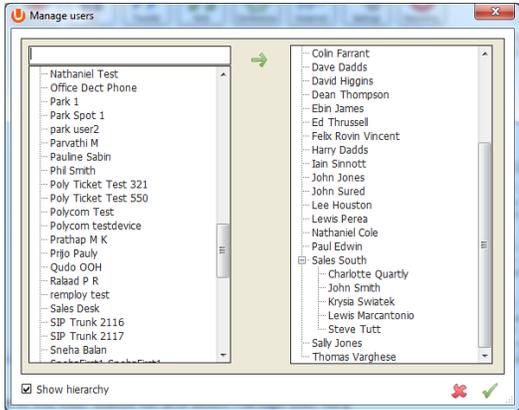
| User Status | | Directories | Call Logs | My status: available in office |
|---------------|------------|-------------|-----------|--|
| User Name | Department | Status | | |
| Abin Joseph | | | | |
| Alastair Bro | | | | Talking to Qudo Support (Test Support) |
| Amith Bhar | | | | |
| Amy Dadds | | | | |
| Andrew Sm | | | | |
| Anu John | | | | |
| Barry Simps | | | | |
| Charlotte Q | South | | | Unavailable profile activated |
| Cindy Baker | | | | |
| Colin Farran | | | | Talking to Lewis Marcantonio |
| Dave Dadds | | | | |
| David Higgins | | | | |
| Dean Thompson | | | | |
| Ebin James | | | | |

6.2 Managing Monitored Users

To modify the list of users currently being monitored, right-click anywhere in the User Status list and select Manage user list.



You will then be able to move users between the lists either by double-clicking them or using the arrow button. All users in the right-side list will be monitored in the User Status tab. This list is saved when Nextiva Unity is closed.



You can also search for specific users or departments, and can move parent items to move all child items of that parent item. Click OK to return to the main window where the User Status list will be automatically updated. You do not need to restart Nextiva Unity. Please note that services such as hunt groups, call centers, trunk groups, auto attendants, etc. cannot be monitored.

6.3 Monitored User States

A monitored user will always be displayed in one of four states:

| State | Description | Image When Online | Image When Offline |
|-------------|--|-------------------|--------------------|
| Available | The user is not currently on the phone, nor do they have Do Not Disturb, Call Forward Always or CommPilot Express Busy/Unavailable profile activated. They are free to receive a call. | Andrew Smith | Andrew Smith |
| Ringing | The user's telephone is ringing. | Andrew Smith | Andrew Smith |
| Engaged | The user is currently engaged on the phone. | Andrew Smith | Andrew Smith |
| Unavailable | Either the user has Do Not Disturb, Call Forward Always or CommPilot Express Busy/Unavailable profile activated. | Andrew Smith | Andrew Smith |

Monitored users are available for instant messaging if they are online, meaning they are currently logged into a running Nextiva Unity client. If this is the case, they will be displayed with an envelope in the User Status list, as shown in the list above.

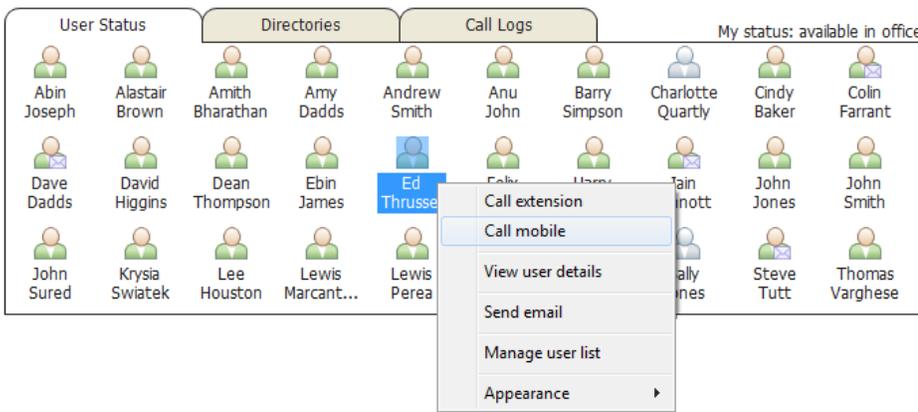
6.4 Performing Call Control Actions in the User Status List

There are many call control functions that can be performed from within the User Status tab, most of which are accessed by right-clicking on a monitored user and selecting a call control action from the context menu. This menu will dynamically change to only show relevant options depending on the state of the monitored user and/or the state of the selected call in the Current Call List (if there is one).

6.4.1 Calling a Monitored User

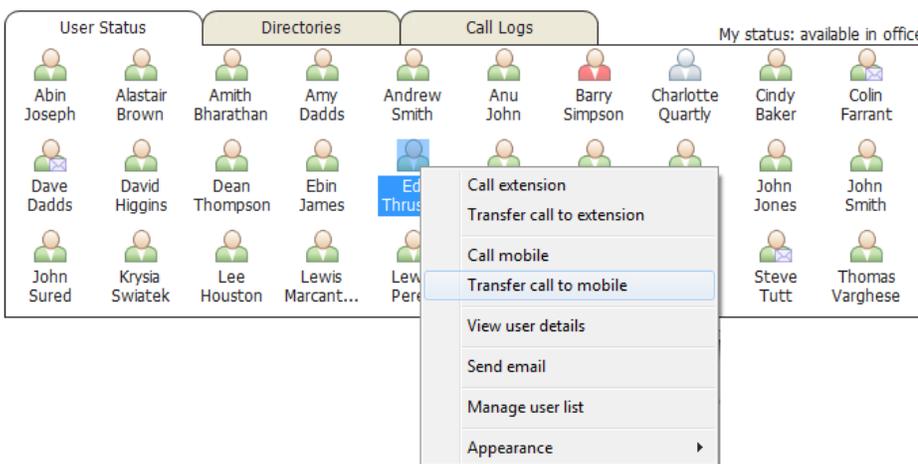
Whether on a call or not, you can double-click a monitored user to dial their extension, or right-click and select which number to dial from the context menu. In the below screenshot the option to call the monitored user's mobile is also available because it has been entered in the profile for that user.

As is always the case, if you are currently on an active call then it will automatically be put on hold first.

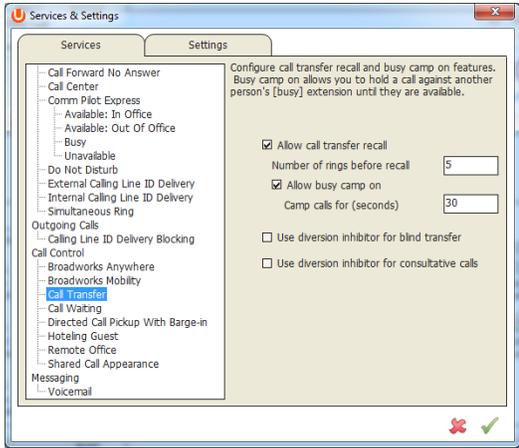


6.4.2 Transferring a Call to a Monitored User

You can right-click a monitored user and either transfer to the user's extension or mobile number (if entered in the monitored user's profile). This will result in a blind transfer; if you wish to perform an announced transfer then you should call the user first, then transfer the calls together after making the announcement.

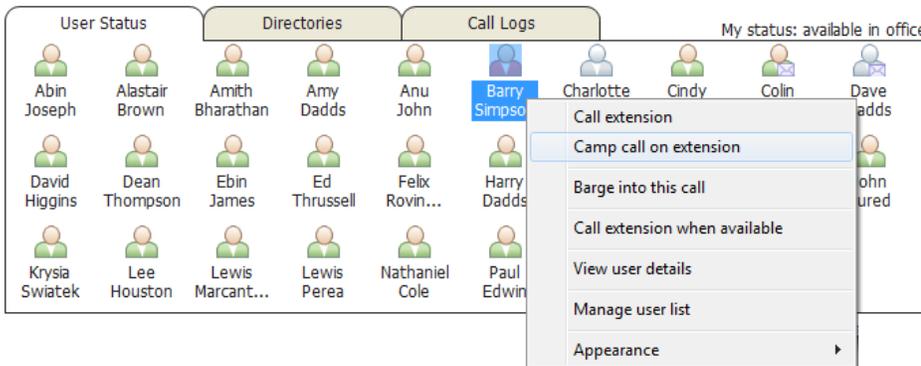


If a call is transferred to a monitored user and they don't answer it, then it can be routed back to the person that transferred. This assumes other factors such as voicemail and call forwarding don't take precedence. This is configured through Settings, as shown below. In this case, a transferred call will be recalled to the user that transferred the call if it hasn't been answered after five rings, and it hasn't been processed by voice messaging or call forwarding routing policies.



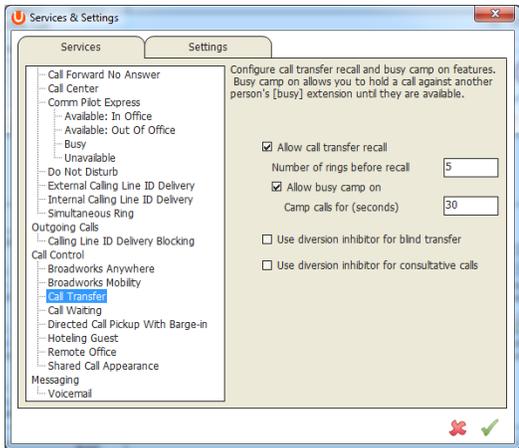
6.4.3 Camping a Call Against a Monitored User

If the monitored user is on the phone, then the call selected in the Current Call List can be camped against that user's extension, as shown below.



When a call is camped against an extension, it is queued for that user for a pre-determined period of time. If the monitored user ends their current call then the camped call will be routed to them and their phone will start ringing, if the call is not routed to them within the pre-defined period then it will be routed back to the user that camped the call.

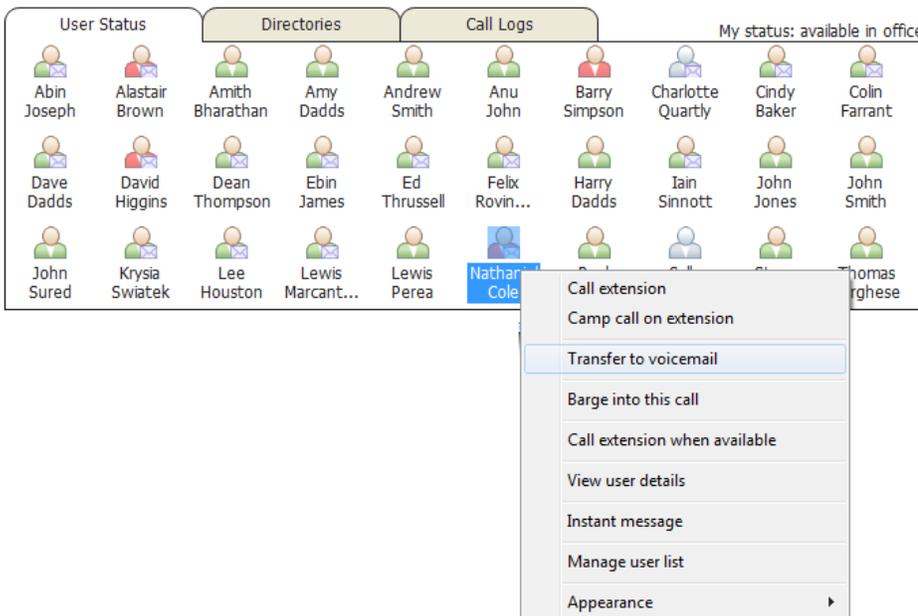
The Camping a call feature must be activated in Settings, as shown below. This is a function of the Call Transfer service.



The above screenshot shows that if a camped call is not routed to the monitored user within 30 seconds, then it will be routed back to the logged in user.

6.4.4 Transfer to Voicemail

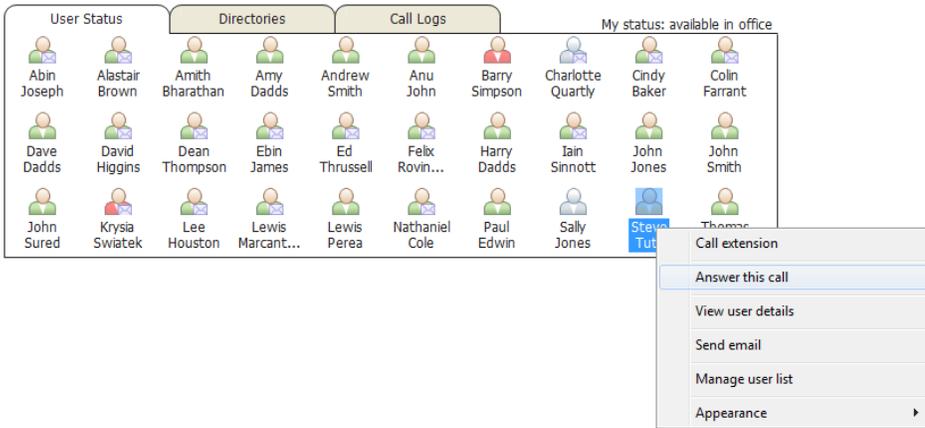
When there is a call in the Current Call List, the user can choose to transfer directly to the voicemail service of a monitored user as shown below. This feature is available even if the monitored user is available, but relies on voicemail being assigned and active for the monitored user. If selected, Nextiva Unity will divert the selected call in the Current Call List to the monitored user's voicemail service directly, without ringing their phone.



6.4.5 Performing Call Pickup

This feature allows the logged in user to answer an incoming call on behalf of a monitored user. It relies on the user being part of the same Call Pickup group as the monitored user, or having the Directed Call Pickup With Barge-In service assigned. In either case,

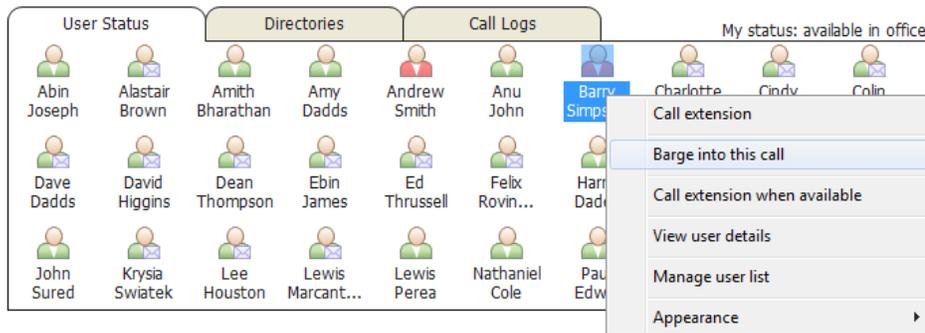
when the user selects the option from the context menu (as shown below) the call will automatically be redirected, and will appear in the Current Call List where it can be answered normally.



Please note that if the user is not a member of the same Call Pickup group and does not have the Directed Call Pickup With Barge-In service assigned, this menu option will not be available. This feature is only available when the monitored user's phone is ringing, indicating an unanswered incoming call.

6.4.6 Barging Into A Call

The Barge-In feature allows the user to join a call that the monitored user is currently on, thereby creating a three-way conference with the monitored user and the remote party.



When barging into a call, the Current Call List will show the two parties of the call that was barged into, as below. The user can then control the conference as normal by holding/retrieving, or adding/removing callers (assuming the N-Way Calling service is assigned).

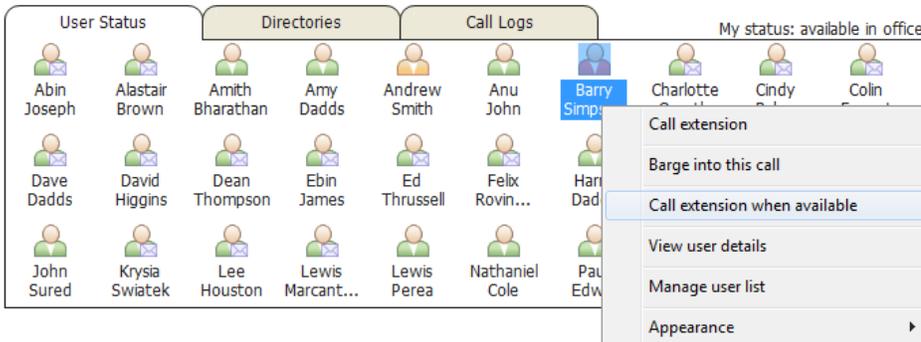
| | From | To | Duration | Status |
|--|------------|---------------|----------|---------------------|
| | Chris Tutt | Barry Simpson | 00:06 | Active (conference) |
| | Chris Tutt | Andrew Smith | 00:06 | Active (conference) |
| | | | | |

Please note that when leaving a call that you barged into, you must transfer the call parties together in order to leave the conference without ending the original call. This is done by selecting the two calls and performing an announced transfer.

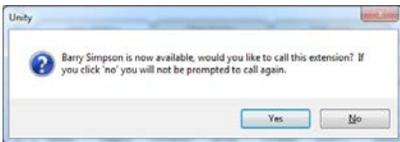
When attempting to barge into a call, if the phone plays a “number does not exist” tone then this means the monitored user cannot be barged into, because they have the Barge-In Exempt service assigned and activated. Only users without this service active can be barged into.

6.4.7 Call Extension When Available

If a monitored user is currently on the phone, you can instruct Nextiva Unity to alert you when the call has ended, as shown below.



Once the user becomes available, Nextiva Unity will ask if you want to call the monitored user. If you click yes, the monitored user will automatically be dialed and the call will appear in the Current Call List.



6.5 Performing Other Actions In The User Status List

6.5.1 View User Details

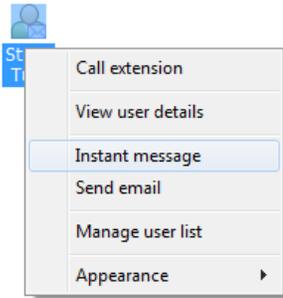
You can right-click a monitored user in the User Status list to view details for the monitored user that have been added to the user profile, as shown below.



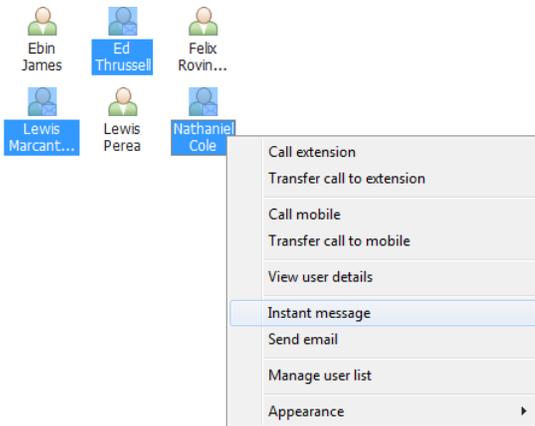
You can also associate a locally saved WAV file to the monitored user. This WAV file will be played in a loop when the monitored user's phone is ringing. This is for use in an Enterprise Assistant environment when the user may want to answer an incoming call on behalf of the monitored user.

6.5.2 Instant Message

If the image that represents a monitored user in the User Status list includes an envelope, then that user is currently logged into Nextiva Unity, which means they are available for instant message chat. To start an instant message conversation from the User Status list, right-click and select from the menu option as shown below.



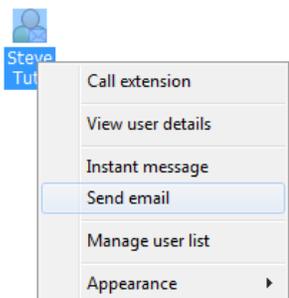
Multiple users can be selected to start an IM conversation (by holding down the CTRL key while selecting users), but they must all be online.



Instant messaging is explained in detail in section [XXX](#) of this document.

6.5.3 Send Email

If an email address is entered in the profile for the monitored user, then you can right-click to send an email using the default email client.



7 Directories

Nextiva Unity integrates with all NextOS-related directories and Outlook contacts by default. Nextiva Unity only loads directories during the start-up process. For example, if a new user is created in the business then they will not appear in the group/enterprise directory until Nextiva Unity has been restarted. Nextiva Unity does not save directories locally; they are stored in the NextOS platform, Outlook profile, etc.

All directories can be accessed in the Directories tab through the drop-down list, as shown below. Depending on the directory selected, the columns in the list will change automatically.

The screenshot shows the 'Directories' tab in the Nextiva Unity interface. The 'Directory name' dropdown is set to 'ABC Company'. A search box contains a magnifying glass icon. Below the dropdown, a list of directories is displayed with columns for 'Name', 'Mobile', and 'Phone Number'. The list includes:

| Name | Mobile | Phone Number |
|------------------|--------|--------------|
| 123456789 123456 | | |
| 9001 9001 | | |
| 9002 9002 | | |
| 9003 9003 | | |
| 9004 9004 | 9004 | |
| 9005 9005 | 9005 | |

7.1 Searching Directories

When performing a contact search, all directories except third-party directories are searched by default. In order to include third party directories in the contact search, you must press ENTER or click the search button . When displaying search results, Nextiva Unity will display each number in a separate line, even if it is for the same contact, as shown below.

The screenshot shows the 'Directories' tab with the 'Directory name' dropdown set to 'Personal directory'. The search box contains the text 'thr' and a magnifying glass icon. The search results are displayed in a table with columns for 'Name' and 'Phone Number':

| Name | Phone Number |
|-----------------------------|--------------|
| Ed Thrusell | 1247 |
| Ed Thrusell (direct number) | 02082881247 |
| Ed Thrusell (mobile) | 07919594395 |
| Sticks & Stones Bathroom | 02089778855 |

7.2 Group/Enterprise Directory

This is the business directory, which includes all NextOS users in the same business or enterprise. The directory also includes all group services such as call centers, hunt groups, and auto attendants. Nextiva Unity will display the extension, mobile number (if present in the user profile), and phone number (if assigned).

The screenshot shows the 'Directories' tab with the 'Directory name' dropdown set to 'ABC Company'. The search box contains a magnifying glass icon. The search results are displayed in a table with columns for 'Name', 'Extension', 'Mobile', and 'Phone Number':

| Name | Extension | Mobile | Phone Number |
|---------------------|-----------|----------------|--------------|
| Felix Rovin Vincent | 8331 | 00919895013318 | 02035518331 |
| Gopikrishnan V | 8332 | 00919995942802 | 02035518332 |
| Amith Bharathan | 8333 | 00919995923747 | 02035518333 |
| Prjo Pauly | 8334 | 00918943051332 | 02035518334 |
| Abin Joseph | 8335 | 00919400440034 | 02035518335 |

You can also select a specific department within the group/enterprise to view all users that belong to that department. Please note that only departments that have users associated with it will be included in the drop-down list.

| User Status | | Directories | | Call Logs | | My status: available in office | |
|-------------------|-----------|--------------|--------------|-----------|--|--------------------------------|--|
| Directory name | | -Sales South | | | | | |
| Name | Extension | Mobile | Phone Number | | | | |
| Charlotte Quartly | 1233 | | 02082881233 | | | | |
| Steve Tutt | 1251 | | 02082881251 | | | | |
| Krysia Swiatek | 1261 | 07831210700 | 02082881261 | | | | |
| Lewis Marcantonio | 1265 | 07479552779 | 02082881265 | | | | |
| John Smith | 8787 | | 02086192108 | | | | |

7.3 Group/Enterprise Common Phone List

The Group/Enterprise Common Phone List is a list of commonly called numbers that is shared between all users in the business; for example, a courier company phone number. Although they can be displayed, the user does not have permission to modify the list in any way; only a group administrator can modify the list.

| User Status | | Directories | | Call Logs | | My status: available in office | |
|----------------|--------------|-------------------|--|-----------|--|--------------------------------|--|
| Directory name | | Common phone list | | | | | |
| Name | Phone Number | | | | | | |
| David Langley | 02073678469 | | | | | | |
| Dean Mobile | 07920539393 | | | | | | |
| Dotti | 07428685822 | | | | | | |
| Emme - A2B | 07585957655 | | | | | | |
| Excel | 01132863299 | | | | | | |
| Fiveways | 02073942660 | | | | | | |

If the group/enterprise's common phone list is empty, then it will not be included in the drop-down list.

7.4 Personal Directory

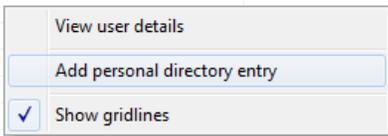
The personal directory is a private list of contacts that is only accessible by that user.

| User Status | | Directories | | Call Logs | | My status: available in office | |
|-----------------------|---------------|--------------------|--|-----------|--|--------------------------------|--|
| Directory name | | Personal directory | | | | | |
| Name | Phone Number | | | | | | |
| Chet Curry | 0018133211069 | | | | | | |
| Chris & Han | 12487 | | | | | | |
| Dad Auckland Landline | 006496344175 | | | | | | |
| Dad mobile | 0064274300005 | | | | | | |
| Dan Builder | 07974810349 | | | | | | |
| Daryl the carpenter | 07984972687 | | | | | | |

The personal directory can be completely managed through Nextiva Unity, as outlined below.

7.4.1 Adding a Personal Directory Entry

To add a new personal directory entry, right-click anywhere in the directory list and select the menu option below. Please note that the personal directory does not have to be loaded to see this option in the context menu.

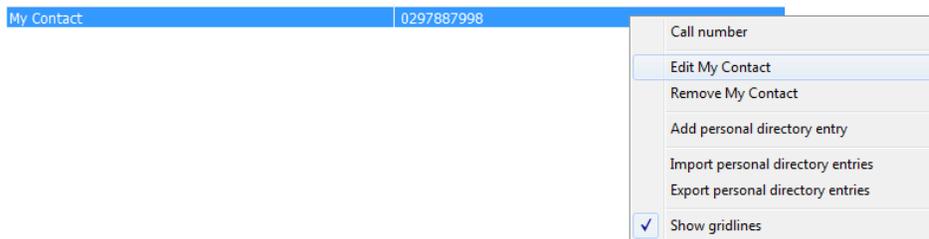


You can then enter the details for the new contact as shown below, then click OK. The entry will automatically be added to the existing personal directory list.



7.4.2 Editing a Personal Directory Entry

To edit an existing personal directory entry, the user must right-click on the entry from the list and select the option below.



The directory entry can then be modified as shown below.

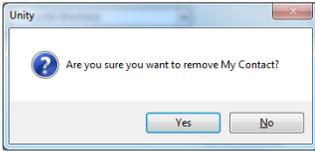


7.4.3 Removing a Personal Directory Entry

To edit an existing personal directory entry, the user must right-click on it from the list and select the option below.



Then confirm the action when prompted, as below.



7.4.4 Exporting the Personal Directory

The personal directory can be exported to a CSV file for storage and/or manipulation outside of Nextiva Unity. This is especially important when recreating a user account or sharing personal contacts between users.

To export the directory, right-click any entry while the personal directory is selected in the Directories drop-down list, and select the menu option below.



You will then be prompted to specify the folder path where you would like the file to be saved, as shown below. It will be saved as PersonalDirectory.csv file by default, however this can be overwritten.

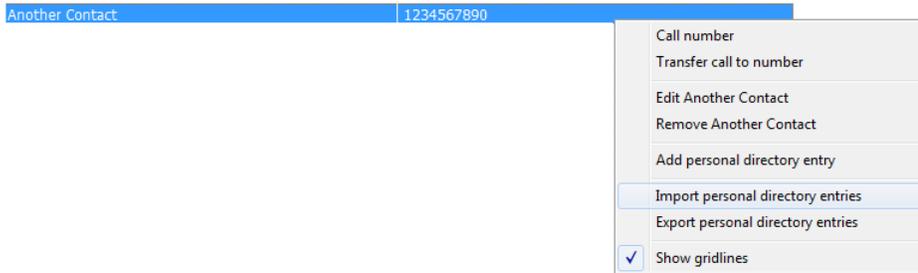


Once the export file location has been selected, Nextiva Unity will export the personal directory entries in "name,number" format. Nextiva Unity will alert you once the export is complete.



7.4.5 Importing the Personal Directory

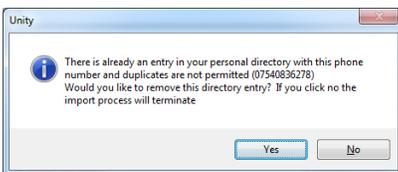
A CSV file that is in “name,number” format can be imported into Nextiva Unity, which will import the list into the personal directory for that user. To perform an import, right-click any entry while the personal directory is selected in the Directories drop-down list, and select the menu option below.



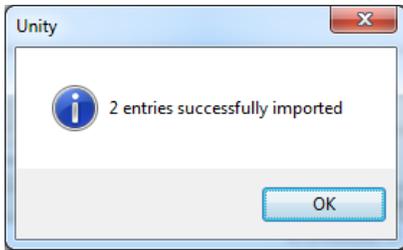
You then need to select the file to be imported, as shown below.



If any errors are encountered during the import, Nextiva Unity will prompt you to continue and will terminate the import. This includes illegal characters and duplicate entries, as shown below.



Nextiva Unity will alert you once the import has been completed successfully. These entries are now saved on the NextOS platform.



7.5 Outlook Contacts

By default, Nextiva Unity will integrate with Outlook 2003 and later to load both private and public contacts. Nextiva Unity supports contacts that are stored in local .pst files, as well as contacts stored on Exchange Servers.

When displaying Outlook contacts in the Directory list, Nextiva Unity will include the Business Name (if configured through Settings), Business Phone, Home Phone, and Mobile columns. However, additional contact properties are loaded into Nextiva Unity when uploading, which are available when searching for contacts.

| User Status | | Directories | | Call Logs | | My status: available in office | |
|------------------|----------------|------------------|--------|-----------|--|--------------------------------|------------------|
| Directory name | | Outlook contacts | | | | | |
| Name | Business Phone | Home Phone | Mobile | | | | |
| Karen Connell | | 123456789 | | | | | |
| Kingston Leisure | | 02085461042 | | | | | |
| Stephen.noone | | 02082881248 | | | | | |
| Teimour | 0013103602046 | | | | | | |
| April | +1 6102300404 | | | | | | +1 (555) 2178462 |

When searching for contacts, Nextiva Unity will search the below Outlook contact properties:

- Business Main Phone
- Business Phone Two
- Home Phone
- Home Phone Two
- Primary Phone
- Other Phone
- Company Name
- Contact Name

When displaying search results, the name column will include the location of the number if it is an Outlook contact, as shown below.

| User Status | | Directories | | Call Logs | | My status: available in office | |
|-------------------------|--------------|----------------------------|--|-----------|--|--------------------------------|--|
| Directory name | | DRD Communications Limited | | | | todd | |
| Name | Phone Number | | | | | | |
| Todd Dempsey (business) | 02074491026 | | | | | | |
| Todd Dempsey (home) | 01054779899 | | | | | | |
| Todd Dempsey (other) | 07797554036 | | | | | | |

You can also search by business name to display all contacts within that business.

| User Status | | Directories | | Call Logs | | My status: available in office | |
|--------------------------------|--|----------------------------|--|-----------|--|--------------------------------|--|
| Directory name | | DRD Communications Limited | | pwd | | | |
| Name | | Phone Number | | | | | |
| Karen Connell - PWC (business) | | 03950664021 | | | | | |
| Karen Connell - PWC (home) | | 02074115447 | | | | | |
| Todd Dempsey - PWC (business) | | 02074491026 | | | | | |
| Todd Dempsey - PWC (home) | | 01054779899 | | | | | |
| Todd Dempsey - PWC (other) | | 07797554036 | | | | | |

7.6 Third Party Directories

Nextiva Unity can connect to any Microsoft SQL Server or LDAP-compliant database (including Microsoft Active Directory) to load and search contacts. Unlike other directories, Nextiva Unity will load or search for contacts within third party directories in real-time. The third party directory integration is configured through the Add Directory wizard, which is accessed through Tools > Custom Directory. Part of this configuration includes specifying which columns to include in the list, as shown below.

| User Status | | Directories | | Call Logs | | My status: available in office | |
|----------------|----------------------|----------------|----------------|-----------|--|--------------------------------|--|
| Directory name | | CRM Contacts | | | | | |
| FirstName | LastName | VoipNumber | ContactMobile | | | | |
| Clare | Smith | +44-2086190533 | | | | | |
| Clare | Wheeler | +44-1865885318 | | | | | |
| Clare Evans - | SC - Civil | +44-2035518027 | | | | | |
| Clark | Inglis | +44-3300020014 | | | | | |
| Claudia | Hsu | +44-2033285611 | | | | | |
| Claudia | Stallion | +44-1273783709 | | | | | |
| Claudine | Tisdell | +44-1173052139 | | | | | |
| Claudio | Deidda | +44-2070847118 | | | | | |
| Claus | Prom | +44-1732759881 | | | | | |
| Clayton | Kells | +44-2030318333 | | | | | |
| Clean | Supply | +44-2087737840 | | | | | |
| Clement | Andreau | +44-2070846930 | | | | | |
| Clement May | Reception | +44-2071860800 | | | | | |
| Clementine | Lerner | +44-2035514021 | 00447525323572 | | | | |
| Cleo | McLaren - NA - Crime | +44-2035518120 | 07825410361 | | | | |
| Cleo | Parthenoglou | +44-2077986130 | | | | | |
| Clerk | of Works | +44-1224441114 | | | | | |
| Clerk | Of Works | +44-1752424458 | | | | | |
| Clerk of | Works | +44-1823220008 | | | | | |

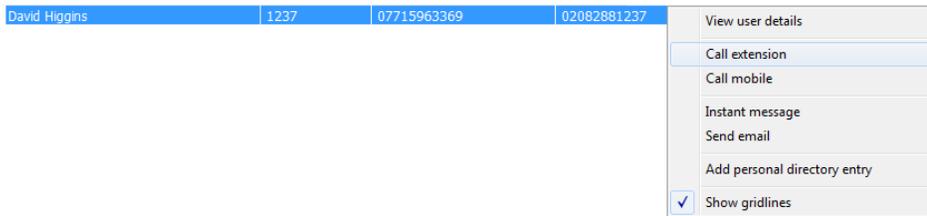
Third party directory integration is achieved through a wizard, which is outlined in the “Connecting To Third Party Databases” document.

7.7 Performing Call Control Actions In The Directory List

7.7.1 Calling a Contact

Double-clicking a directory entry will automatically place any active calls on hold and dial that number. If the contact is a group/enterprise user, then Nextiva Unity will dial the user’s extension number. If the contact is from a third-party directory, then Nextiva Unity will dial the first number in the list, and if it is from any other directory type (common phone list, personal directory etc) or Nextiva Unity is displaying the search results, then the contact will only have one phone number.

You can also right-click the contact to select a number to dial, as shown below. This also applies to third-party directory entries. If the contact is a group/enterprise user then the mobile number can also be called if present in the directory.



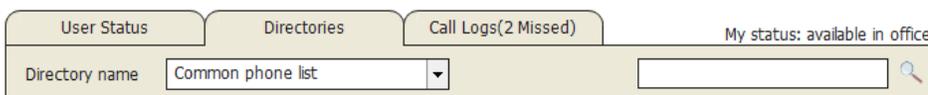
7.7.2 Transferring To a Contact

To transfer a call from the Current Call List, right-click the contact and select the menu option, as shown below. If the contact is a group/enterprise user, then the option to transfer to mobile will also be present. This will result in a blind transfer, but if you wish to perform an announced transfer, then you need to call the user first, and then transfer the calls together after making the announcement.



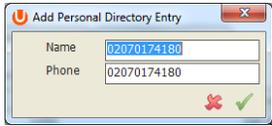
8 Call Logs

The Call Logs tab displays Missed, Received and Dialed Calls in chronological order (although the sort order can be changed by clicking on the column header). The Call logs tab will show the number of missed calls since Nextiva Unity was last used, as well as any missed calls received while Nextiva Unity is running, as shown below.



Double-click any entry to make a call to that number, or right-click to add the number to your personal directory.





9 My Status

The My Status feature provides two functions; quick access to commonly used services, and real-time notifications of service activation that could result in the primary device not receiving calls.

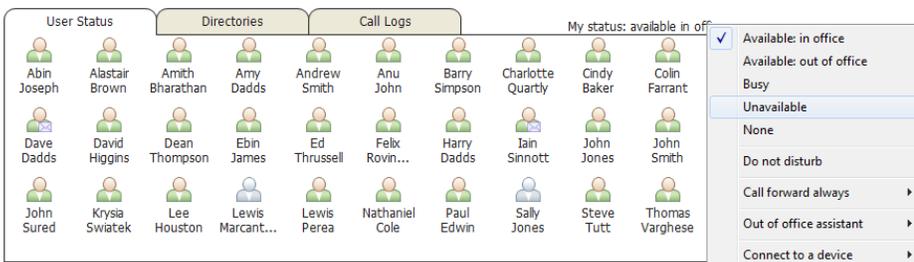
The options presented through the My Status link will dynamically change based on user assignment. For example, if the CommPilot Express service is not assigned to the user then it will not be included in the context menu.

9.1 CommPilot Express Profiles

CommPilot Express profiles are used to apply a pre-configured call routing policy based on your current state. CommPilot profiles are also used to convey presence information to other users within the group or enterprise. As users change their CommPilot Express state, any Nextiva Unity client that is monitoring that user (through the User Status list) will see their image change, as outlined below.

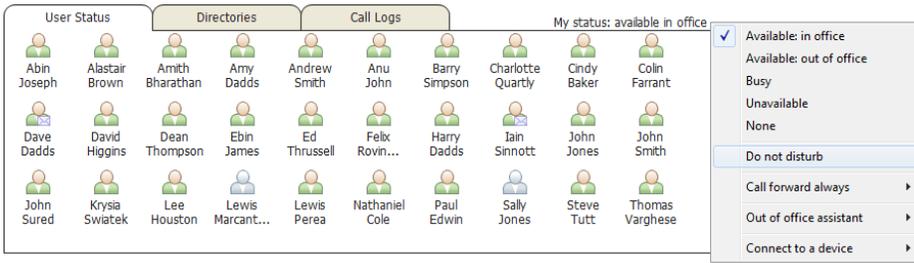
| User State | Description | User Status Image |
|--------------------------|---|---|
| Available: In Office | I am in the office and available to receive calls. |  Andrew Smith |
| Available: Out Of Office | I am not in the office, but am available to take calls. |  Andrew Smith |
| Busy | I am currently busy (short term). |  Andrew Smith |
| Unavailable | I am currently unavailable (longer term). |  Andrew Smith |
| None | No call routing plan is in use. |  Andrew Smith |

The My Status link will show the current CommPilot Express state, unless overridden by another service activation such as Do Not Disturb or Call Forward Always. To change the current status, click on the My Status link and select the state from the context menu, as shown below.

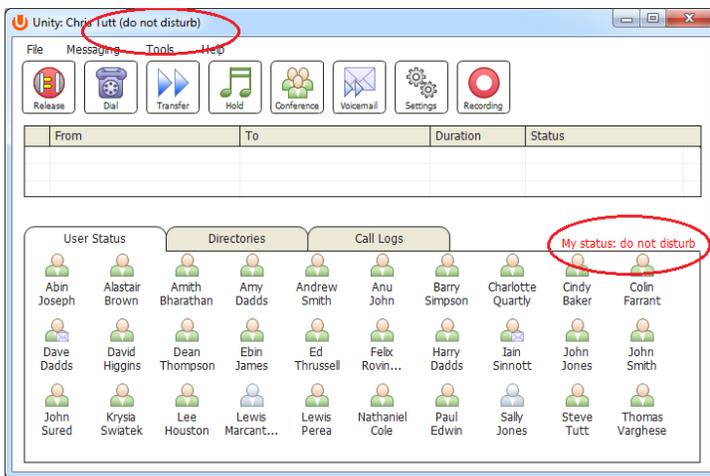


9.2 Do Not Disturb

To activate Do Not Disturb, click on the My Status link and click the menu option, as shown below.



Nextiva Unity will show that the user currently has DND activated through the My Status link and the Nextiva Unity title bar.



Anyone monitoring the user (in the User Status list) will also see that they currently have Do Not Disturb activated.

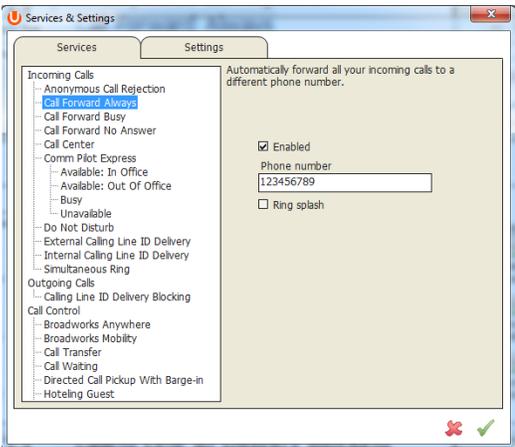
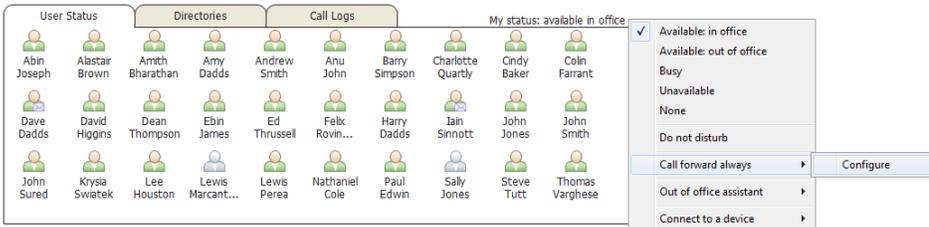


Click on the same menu option or a CommPilot Express status to deactivate Do Not Disturb.

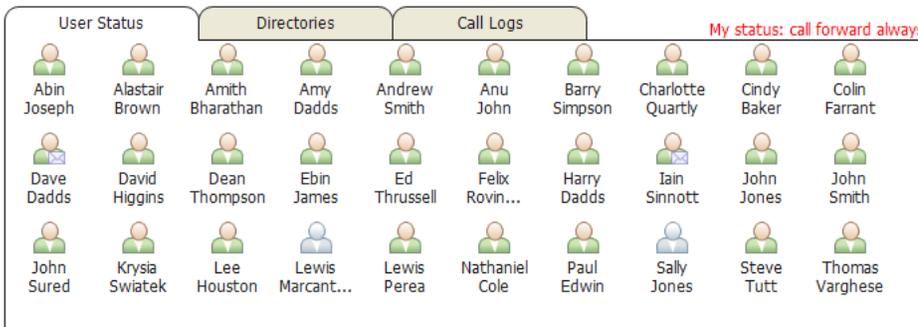
9.3 Call Forward Always

Call Forward Always will automatically route all incoming calls to the pre-defined phone number, meaning the user's phone will not ring.

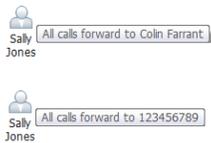
To activate this service, click on the My Status link and activate the service as shown below.



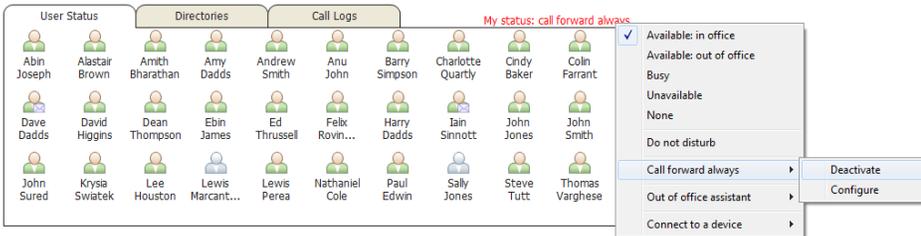
Nextiva Unity will show that the user currently has Call Forward Always activated through the My Status link.



Anyone monitoring the user (in the User Status list) will also see that they currently have Call Forward Always activated, including the forwarding number. If the number is matched to a directory number, then the contact name will be displayed rather than the number.

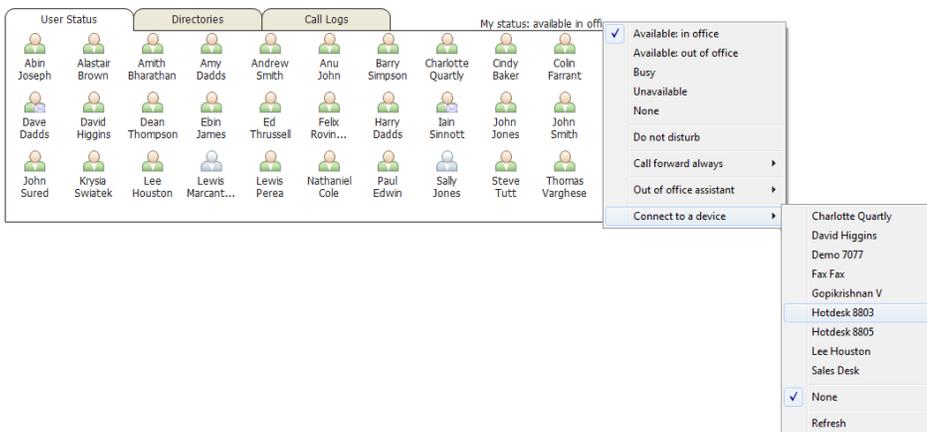


The Call Forward Always service can be deactivated through the My Status link (as shown below) or in Settings .

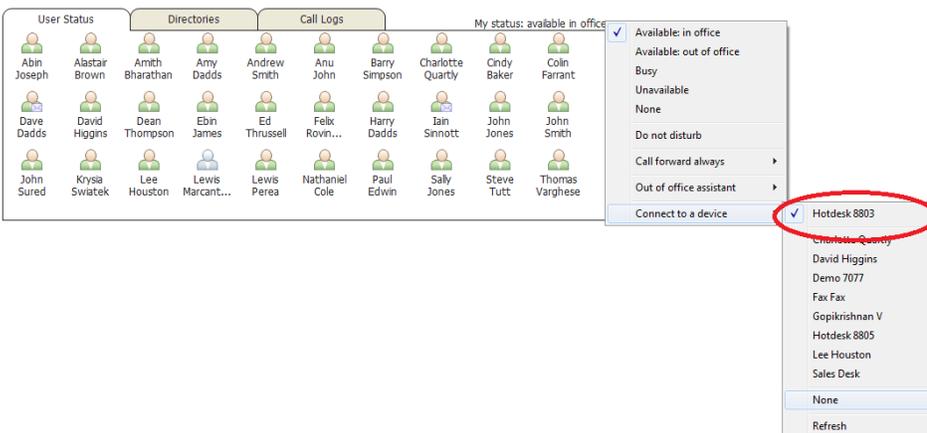


9.4 Hoteling Guest

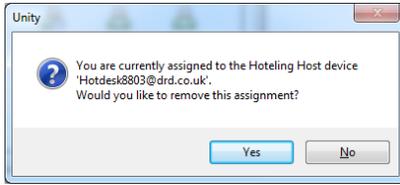
Hoteling Guest allows the user to connect to a device, typically in a hot-desk environment. To attach the user account to a device, select the device from the menu option below. Please note that only available devices (that aren't already in use) will be displayed.



There is no visual notification that the user account is attached to a device, other than if the user clicks on the My Status link, in which case they will see that the device is selected.



When Nextiva Unity is closing, it will prompt the user to remove the device attachment.



If the user selects No, they will continue to be attached to the device until the association is automatically ceased by the Nextiva platform.

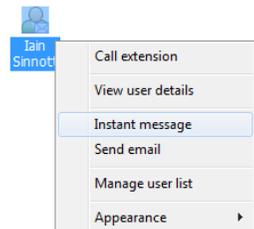
10 Instant Messaging

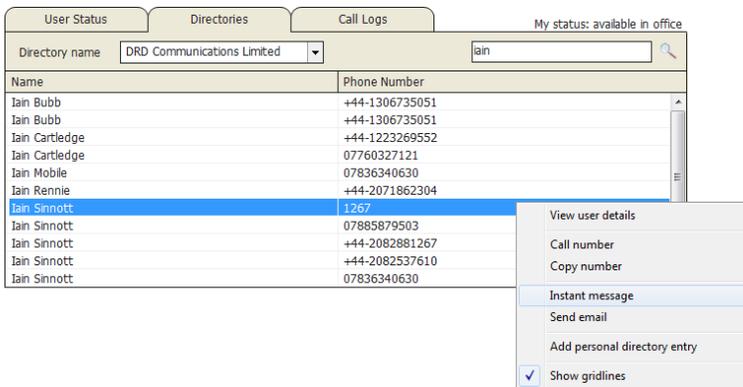
Nextiva Unity Instant Messaging provides company-wide online chat to colleagues within the User Status or Directory lists, or the Messaging menu option. There is no separate login required, and all IM registration is dynamic, meaning “buddy” lists are not required. Any user running Nextiva Unity is automatically available for instant messaging, which is illustrated in the User Status list by showing an envelope with the user image for each user state, as illustrated below.



10.1 Sending an Instant Message

Right-click the user icon/name in User Status or the Group Directory and select Instant Message. Please note that there is no indication of whether the contact is currently online in the directory list, but the menu option will not be displayed if contact is not available. You can select multiple users in the User Status list or in the Directory to quickly initiate a group chat with all selected users, provided they are currently online.

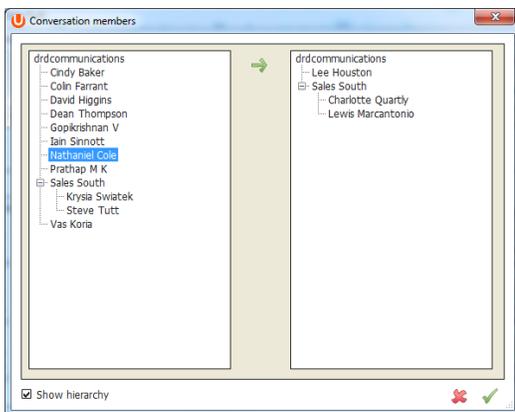




To send a message to multiple people or any user not displayed in the User Status list, click Messaging > Start Conversation.

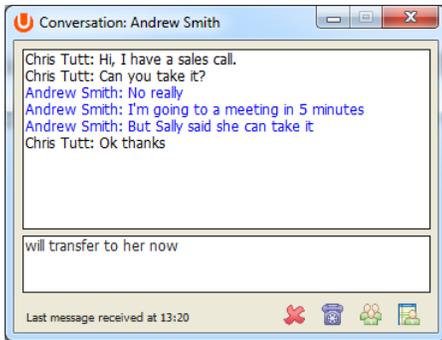


You can then select the users to include in the IM conversation. Please note that only users currently online will be displayed in the lists. The left list contains all online users, and to include them in the IM conversation, move them to the right list by double-clicking the entry or using the arrow button →.



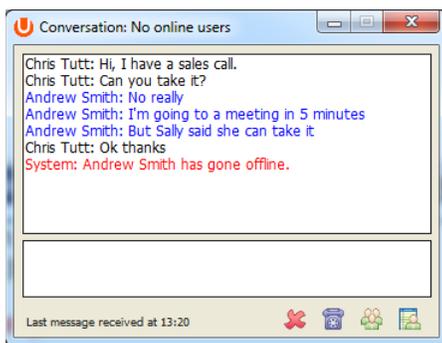
10.2 Instant Message Conversation Window

Each IM conversation is displayed in a separate IM Conversation window; as messages are received, they are displayed real-time in the Messages panel. Messages from other people will be displayed in blue, as shown below. Type your message in the bottom panel and press ENTER or click the Send button  to send your message.



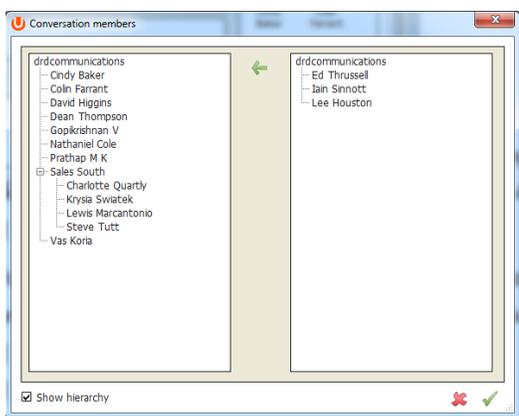
Close the Conversation window by clicking the Close button . Please note that this will not end the IM conversation; other people can still send messages which will be displayed in a new IM Conversation window.

When a user closes their Nextiva Unity application, the Conversation window will show that they are offline.

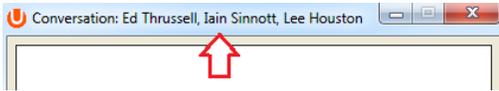


Please note that IM Conversation participants who change their CommPilot Express profile to Unavailable or Busy, or activate Do Not Disturb or Call Forward Always, will not cause them appear offline for IM.

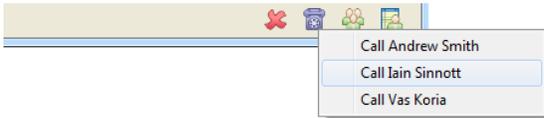
You can add or remove online users from the IM Conversation by clicking the Manage Users button  and selecting the users to include in the conversation, as shown below.



The title bar will always display all current participants. Any users that go offline are automatically removed from the IM Conversation.



You can dial any participant from the IM Conversation by clicking the Dial button . If there are multiple participants, you can select which user to dial from the context menu.



11 Call Detail “Toast” Pop Up

Nextiva Unity can be configured to display a “toast” popup notification in the bottom-right corner of the screen when a call is made or received, as shown below.



Click on the Release button  to release the outbound call.



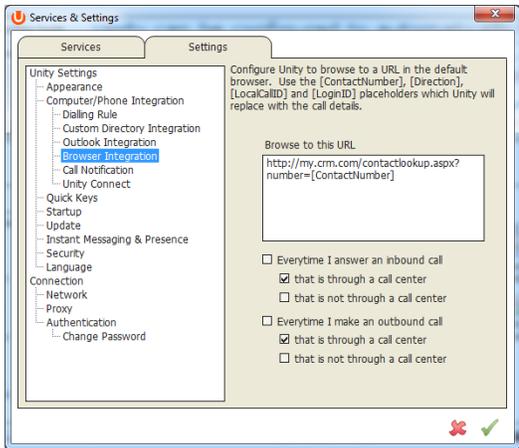
Click on the Answer button  to answer the incoming call.

Click on the Voicemail button  to send the incoming call straight to voicemail. This button will only be displayed if the voicemail service is assigned and active.

11.1 Browser Integration Through Call Detail Popup

Nextiva Unity can be configured to automatically browse to a URL using the default browser when the user clicks on the Call Detail Popup; this applies to both incoming and outgoing calls. The URL will be pre-configured to use delimiters, which are then replaced with values relating to the call.

The URL is specified through Settings . First the URL that Nextiva Unity should browse to must be entered, using special values as placeholders which Nextiva Unity will then replace with the actual values from the call. You can also set Nextiva Unity to automatically browse to the URL for certain calls regardless of whether the Call Detail Popup was selected or not.



In the above screenshot (ContactNumber) is used as a placeholder that will be replaced with the actual phone number of the remote party. Nextiva Unity supports many delimiters relating to a call, so please contact Nextiva for more information.

Once the URL has been entered, Nextiva Unity can be configured to only browse to that URL when the user clicks the Call Detail Popup, as shown below.

