Nextiva CRM
Advanced Customizations

VERSION 1.5

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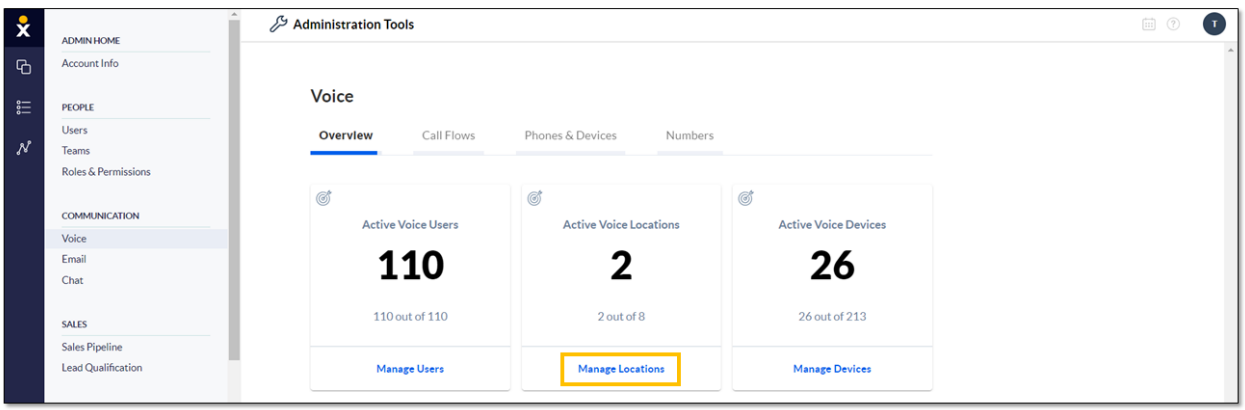
Managing Locations

When a business spans more than one location, it can be challenging to manage, and using multiple systems to keep track of each office can strain your resources and budget. NextOS allows you to manage Locations from one central place, making it easier than ever to manage multiple offices.

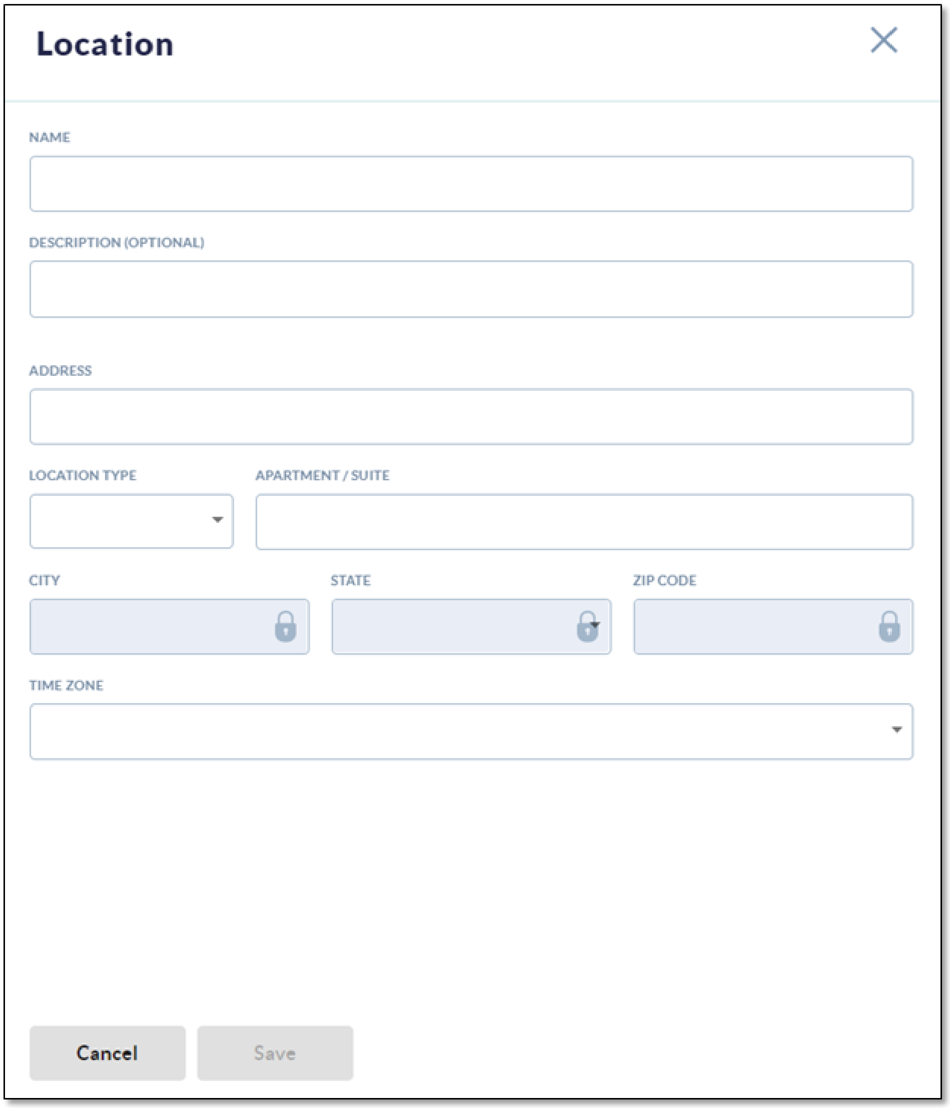
Creating a Location

1. Visit nextiva.com, and click **Login** to log in to NextOS.
2. From the NextOS Home Page, select **CRM**.
3. Click the **Administration Tools** (wrench) icon at the top-right corner of the Nextiva CRM window.
4. Under Communication in the left navigation panel, click **Voice** > **Manage Locations**.



Manage Locations

5. Under **Locations**, click **Create location**.
6. Complete the information as requested on the new Location form and click **Save**.



New Location Form

Editing a Location

1. Under Locations, hover over the Location and click the Action drop-down.
2. Select Edit Location.

Deleting a Location

Make sure to unassign all Users from the Location before deleting the Location.

1. Under Locations, hover over the Location and click the Action drop-down.
2. Select Delete Location.

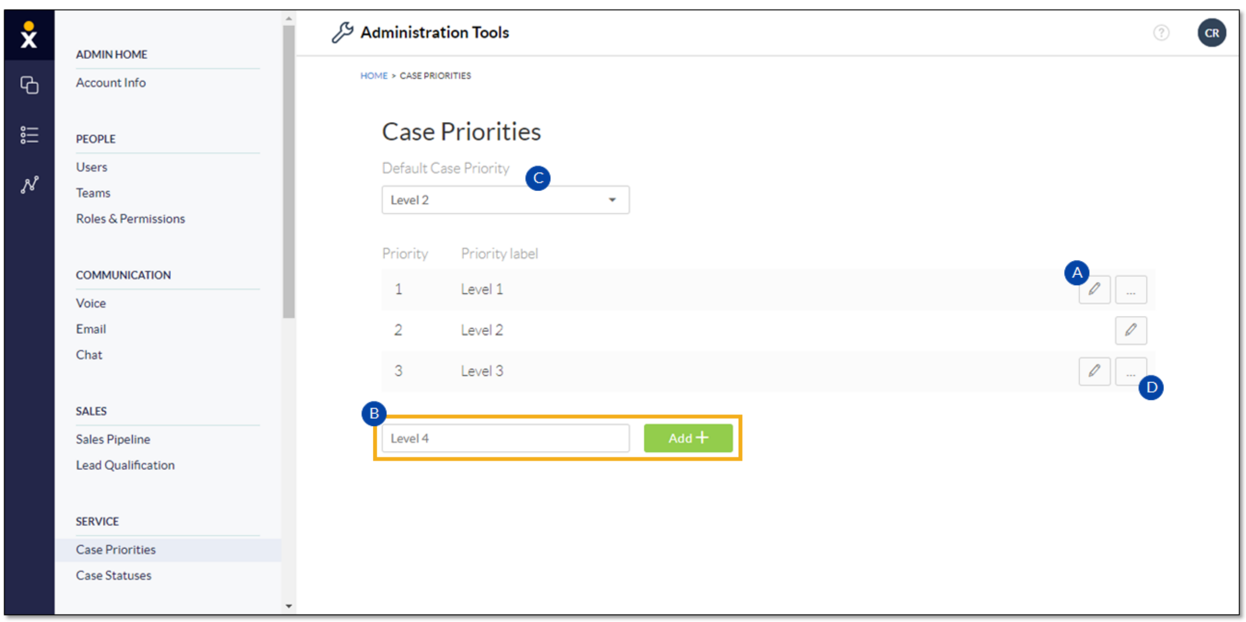
Customizing Case Priority Levels and Status Options

Administrators can customize priority levels and status options to best fit the business or department. For example, you can create multiple priority levels (i.e. critical, medium, and low) to signify its importance, and status (i.e. open, awaiting response, resolved) to indicate the progress toward a resolution. Users can track the progress of each Case by changing the Case status and priority level at various stages of processing the request.

Priority Levels

Customize the priority levels to be more meaningful for the business. By default, Nextiva CRM displays three priority levels (Level 1, Level 2, and Level 3). You can change the labels and add or remove priorities.

1. Visit nextiva.com, and click **Login** to log in to NextOS.
2. From the NextOS Home Page, select **CRM**.
3. Click the **Administration Tools** (wrench) icon at the top-right corner of the Nextiva CRM window.
4. Under **Service** in the left navigation panel, select **Case Priorities** and make the changes.



Case Priorities

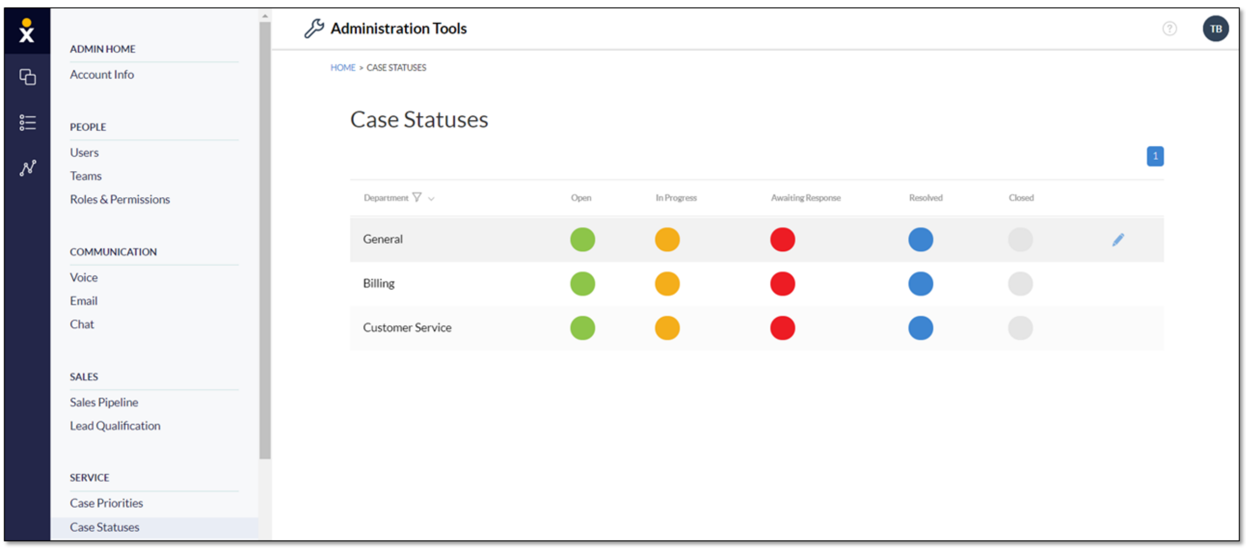
A. Change the priority label by clicking the **pencil** icon and editing the name in the **Priority label** text box. Click the **green checkmark** to save the changes or the **red X** to cancel.

B. To add another priority level, click the text box and enter a name for the priority label, then click the **Add +** button.
C. Select a priority from the drop-down list to make it the default Case priority. Newly created Cases will automatically display this priority label.
D. Delete a Case priority by clicking the corresponding **ellipses (...)** icon. Click **Delete Priority** to confirm.

Case Statuses

Customize the Case statuses in a way that makes the most sense for each department. By default, Nextiva CRM displays five status options (Open, In Progress, Awaiting Response, Resolved, and Closed). Modify the default statuses by creating sub-statuses.

1. Visit nextiva.com, and click **Login** to log in to NextOS.
2. From the NextOS Home Page, select **CRM**.
3. Click the **Administration Tools** (wrench) icon at the top-right corner of the Nextiva CRM window.
4. Under **Service** in the left navigation panel, select **Case Statuses** and make the changes.



Case Statuses

5. Select the row corresponding to the department whose status you want to modify.

Manage Status

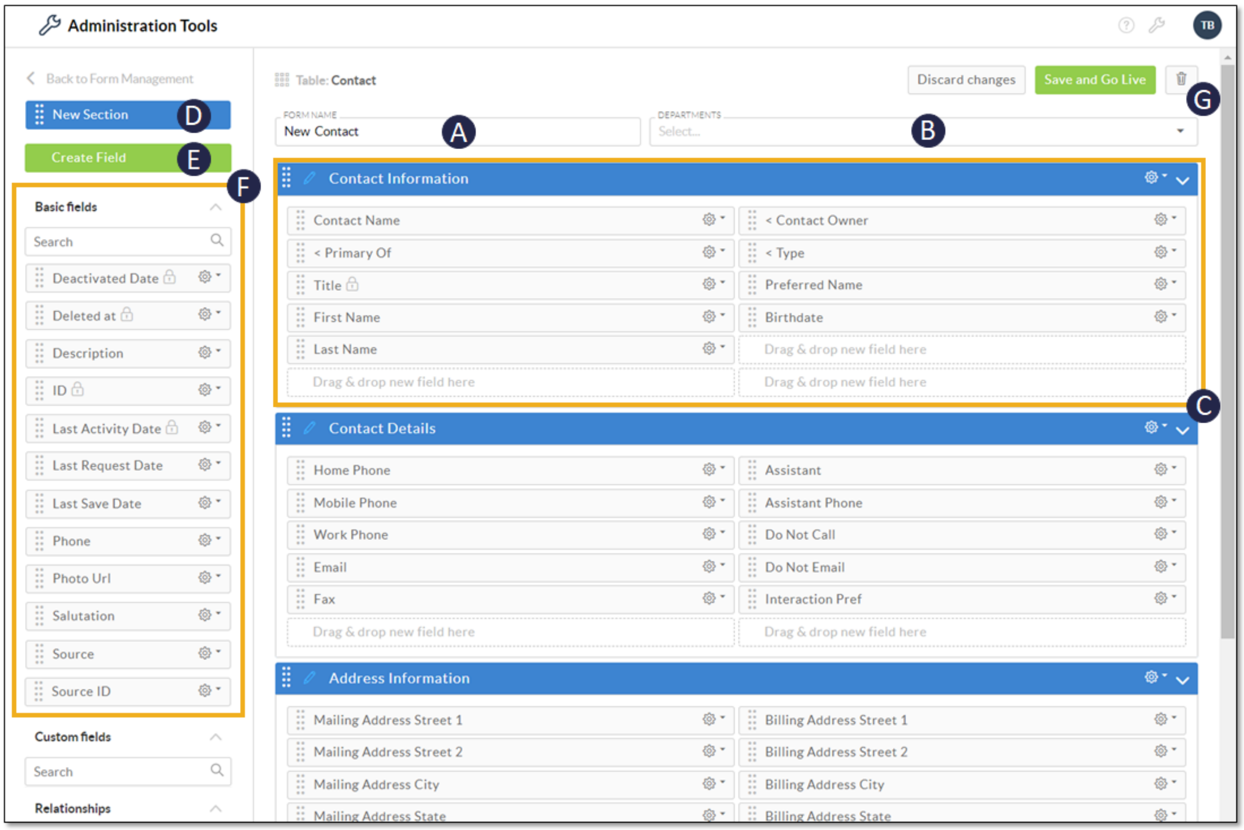
A. Create a new sub-status by selecting the **Status Category** and entering the new sub-status name. Click **Add +** button. The new sub-status will appear under the status category.
B. Modify a sub-status by clicking the edit (**pencil**) icon. Click the green checkmark button to save. Click the red X button to cancel.
C. Delete a sub-status by clicking the ellipses (**...**) icon > **Delete Sub-Status**.

Customizing Forms and Fields

Forms consist of multiple fields that are required or available when creating a new record in Nextiva CRM. For example, when creating a new Contact, it might be required to include a name and phone number, but you also have the option to add an email and mailing address. By default, Nextiva provides ready-to-use forms for creating Accounts, Contacts, etc. Customize the forms to include the fields that best fit the business needs.

1. Visit nextiva.com, and click **Login** to log in to NextOS.
2. From the NextOS Home Page, select **CRM**.
3. Click the **Administration Tools** (wrench) icon at the top-right corner of the Nextiva CRM window.

4. Under **Advanced Settings** in the left navigation panel, select **Forms & Fields**.
5. Click the green **Plus** (+) icon to create a new form. Enter the form name and select the associated table. Click **Apply**.
6. Once you apply the New Form information, you will be taken to the Form Builder screen to customize the fields.
7. Using the Form Builder, begin to customize the fields, then click **Save and Go Live**.

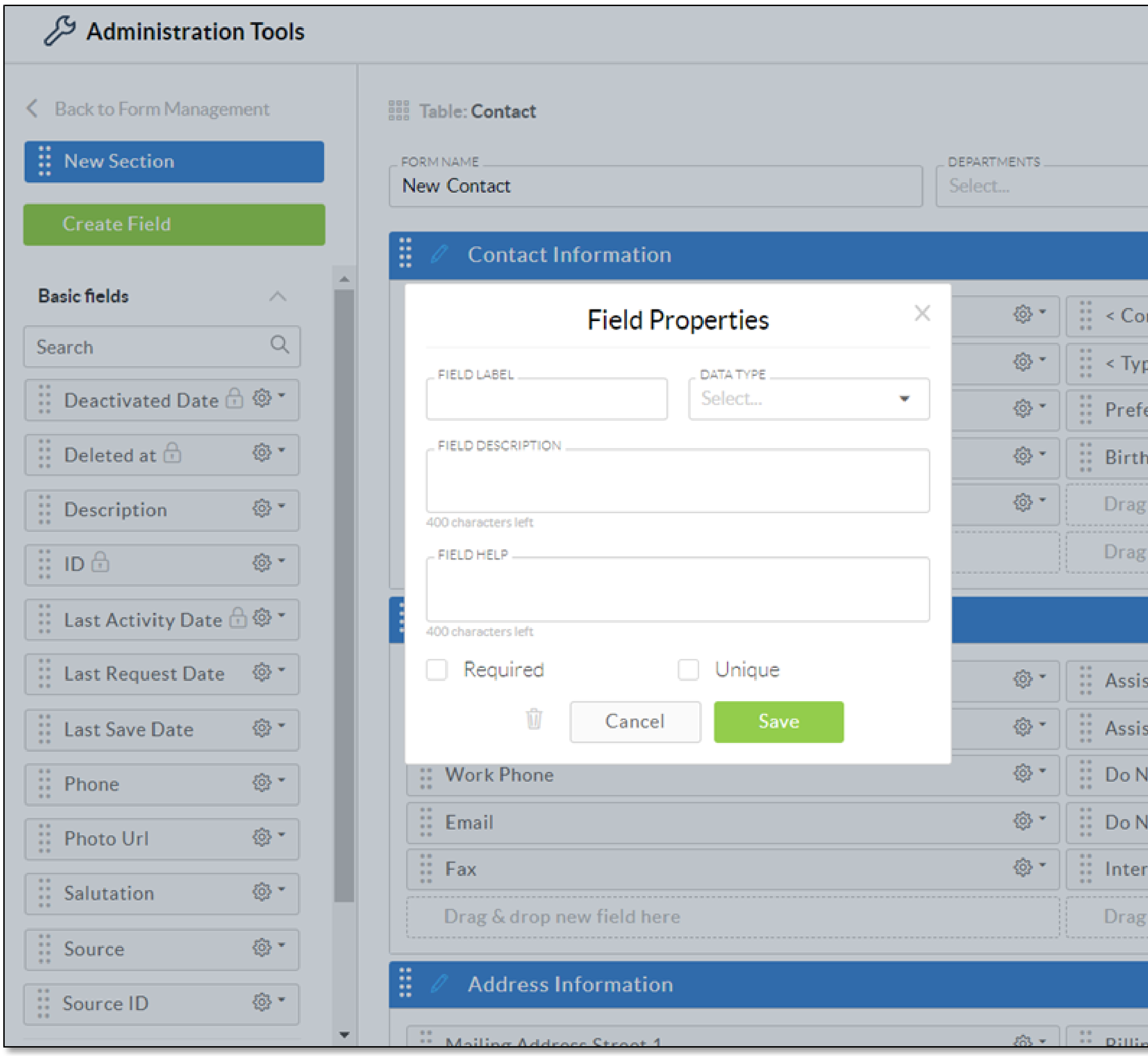


Form Builder

A. Form name
B. Select the **Departments** that can use this form. To remove a Department, click the **X** icon.
C. Edits and Field Requirements:
   a. Reposition: click-and-drag
   b. Edit a section name: click the **Pencil** icon
   c. Set a Field Required, Lock Field, or Remove Field: click the **Gear** icon
D. Add new sections: click-and-drag
E. [Create new fields]
F. Add fields to sections: click-and-drag
G. Delete form

Creating Fields

1. Under the navigation pane of the Form Builder, on the left pane, click **Create Field**.
2. Fill out the Field Properties and click **Save**.
    - **Field Label:** The field title displayed in the form (i.e. Name, Phone Number, Email).
    - **Data Type:** How the data will appear in the field (i.e., Date, Currency, Radio Button).

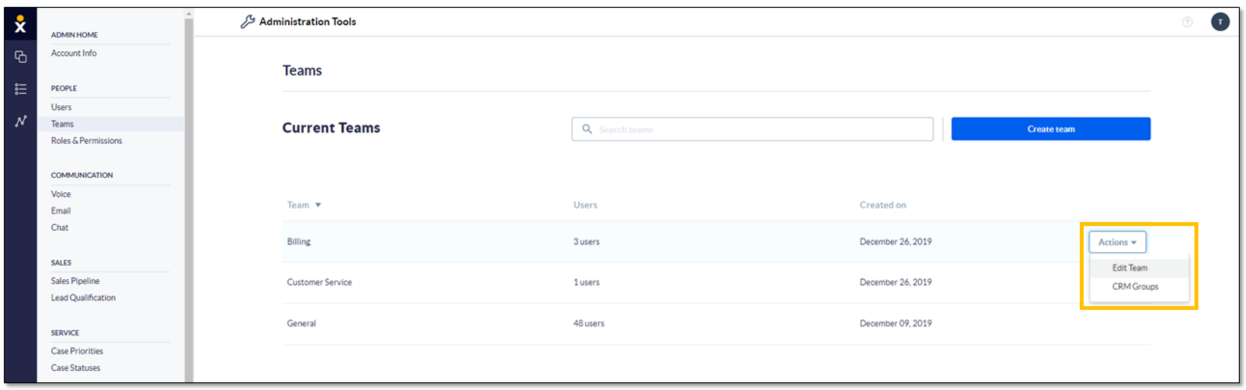


Create Field

Customizing Communication Channels for Teams

NextOS offers businesses the flexibility to choose the preferred communication channels for each Team. Administrators can configure communication channels so customers can quickly contact the appropriate department via phone or email. For example, a business might want to provide the option for customers to contact the sales and support teams by phone or email, but only email for the billing department.

1. Visit nextiva.com, and click **Login** to log in to NextOS.
2. From the NextOS Home Page, select **CRM**.
3. Click the **Administration Tools** (wrench) icon at the top-right corner of the Nextiva CRM window.
4. Under **People** in the left navigation panel, select **Teams.**
5. Hover over the Team and click the **Action** drop-down list. Select **CRM Groups**.



Teams

6. On the **Groups** page, click the Team to edit.
7. Under **General Settings** > select the checkbox(es) corresponding to the desired communication channel(s). This action expands the relevant section(s).
8. Complete the fields for each selected channel and click **Save**.

Phone

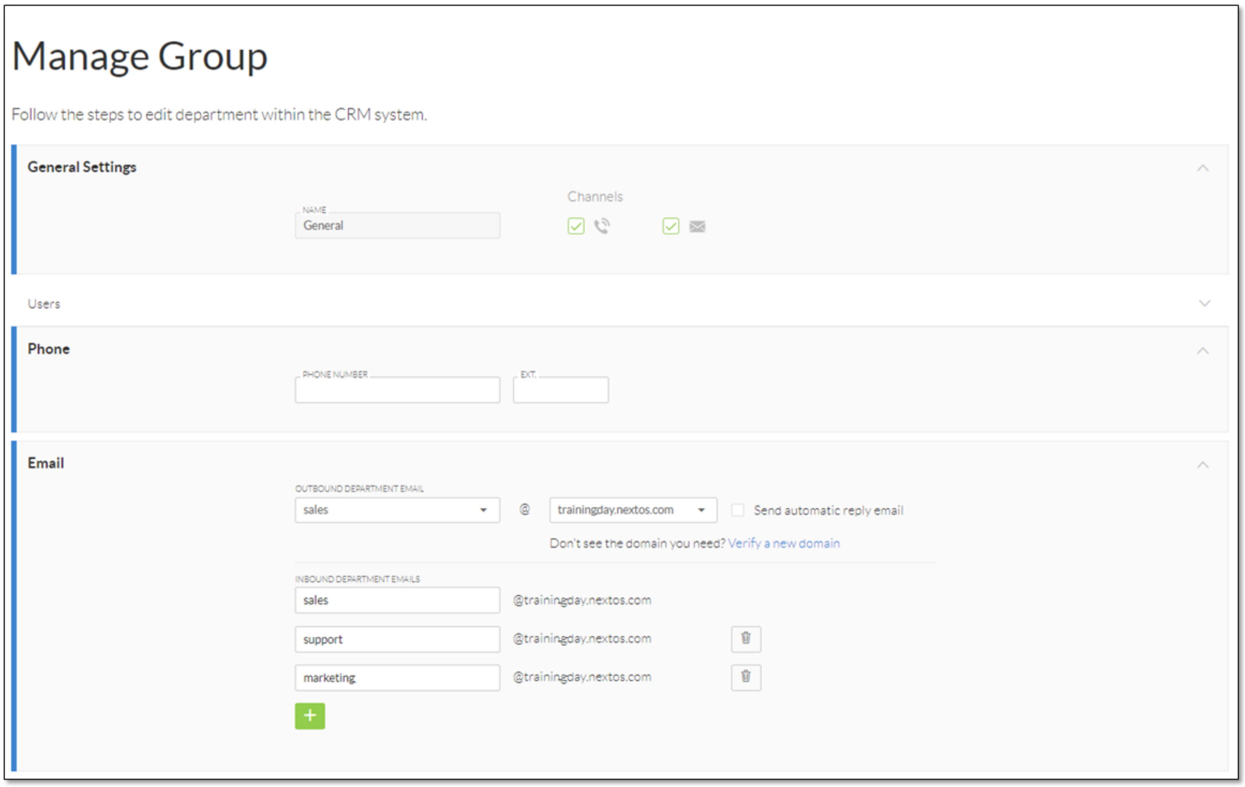
In the **Phone** section, enter the phone number and extension for the Team to communicate with customers.

Email

With email configured, every time a customer sends an email to the company, it will automatically generate a Case in Nextiva CRM.

Configure the following settings in the Email section:

- **Outbound Department Email:** Select the outbound Team and the domain from the drop-down lists.
    - Click **Verify a new domain** to set up a custom email domain.
    - **Send automatic reply email:** Select this checkbox to send an email reply upon receipt of an email automatically. For example, customers can receive an email confirming their email was received and provide the Case number, subject, department, and status.
- **Inbound Department Emails:** Specify one or more inbound Team email addresses by entering the mailbox name (e.g. support). Add additional mailboxes by clicking the green **Add** (+) button.



Manage Groups