



Nextiva CRM
Administrator's Guide to Getting Started

PART 1
VERSION 1.1

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Nextiva CRM

Use Nextiva's Customer Relationship Management (CRM) tools to better enhance any customer journey by tracking all interactions from recruitment throughout the life of the relationship. Nextiva CRM improves business productivity, profitability, and communication processes all within one system. Introducing new features to your business, such as call pop, chat, sentiment analytics, and custom automation, NextOS can benefit any size business anywhere.

In This Section

Getting started as an Administrator is simplified with NextOS. Once the basics are setup, customizing and automating your CRM becomes a synch (those options are covered in the next guide, [download here](#)).

- Designing Teams
- Setting up Users
- Assigning User Roles
- SmartTopics
- Account Information

Administration Tools

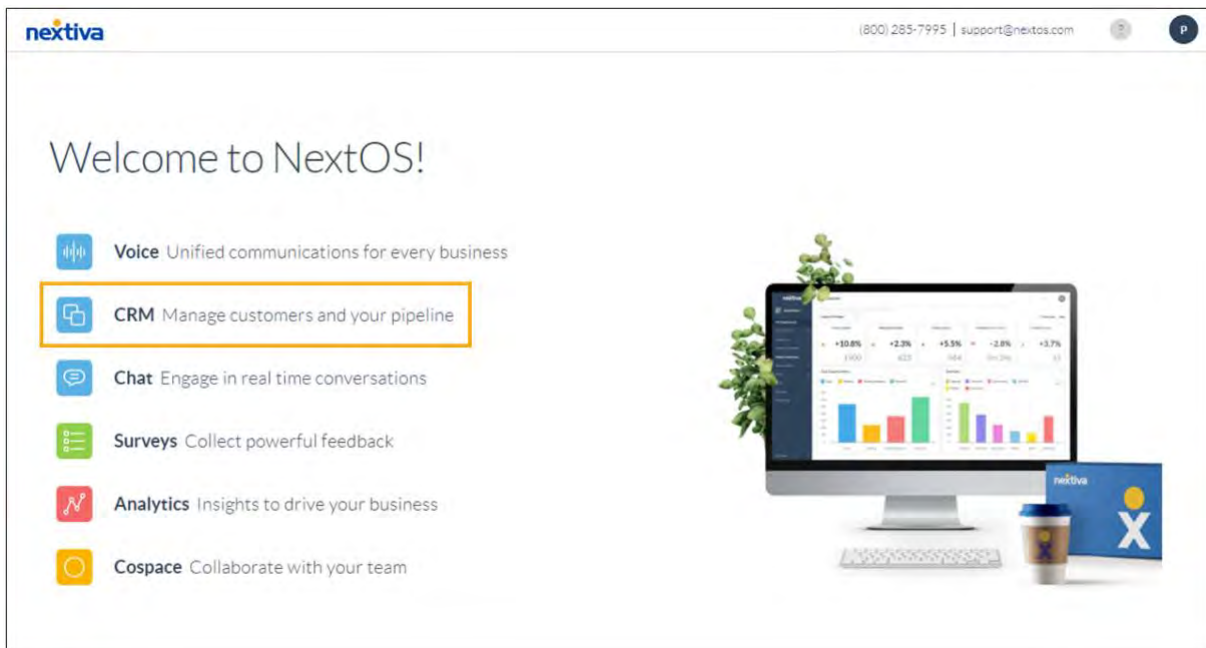
Use Administration Tools in Nextiva CRM to manage and customize NextOS for the business. Some tasks include:

- Maintaining the NextOS account
- Setting up employee access to NextOS
- Managing communication methods and organizing the interactions between the company and the customers
- Automating communications, campaigns, and surveys to improve efficiency and productivity
- Helping the business track the customer journey
- Customizing the NextOS experience to fit business needs

- Ensuring system security

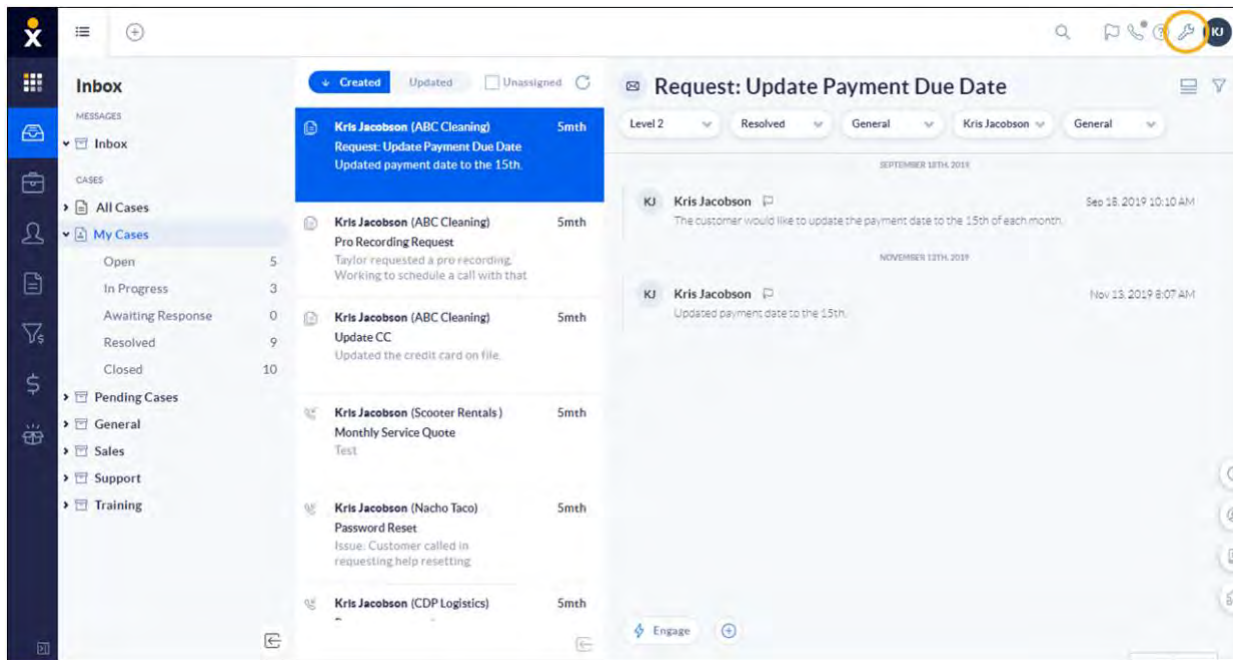
Accessing Administration Tools

1. Visit www.nextiva.com, and click **Login** to log in to NextOS.
2. From the NextOS Home Page, select **CRM**.



NextOS Home Page

3. Click the **Administration Tools** (wrench) icon at the top-right corner of the Nextiva CRM window.



Administration Tools Icon

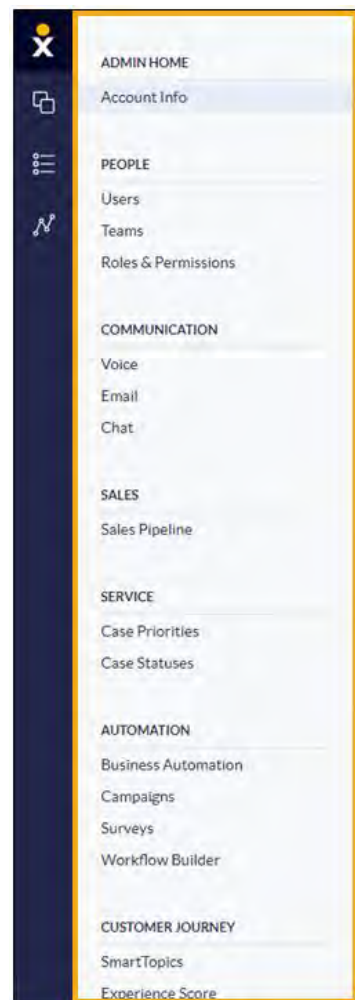
Navigating Administration Tools

All Administrative options are displayed on the dashboard for ease of use; the Left navigation panel is the main menu, and the center panel acts as a workspace. To the very far left, in dark blue, is the Applications menu which exits the Admin view and navigates to CRM, Analytics, etc.

Left Navigation Panel

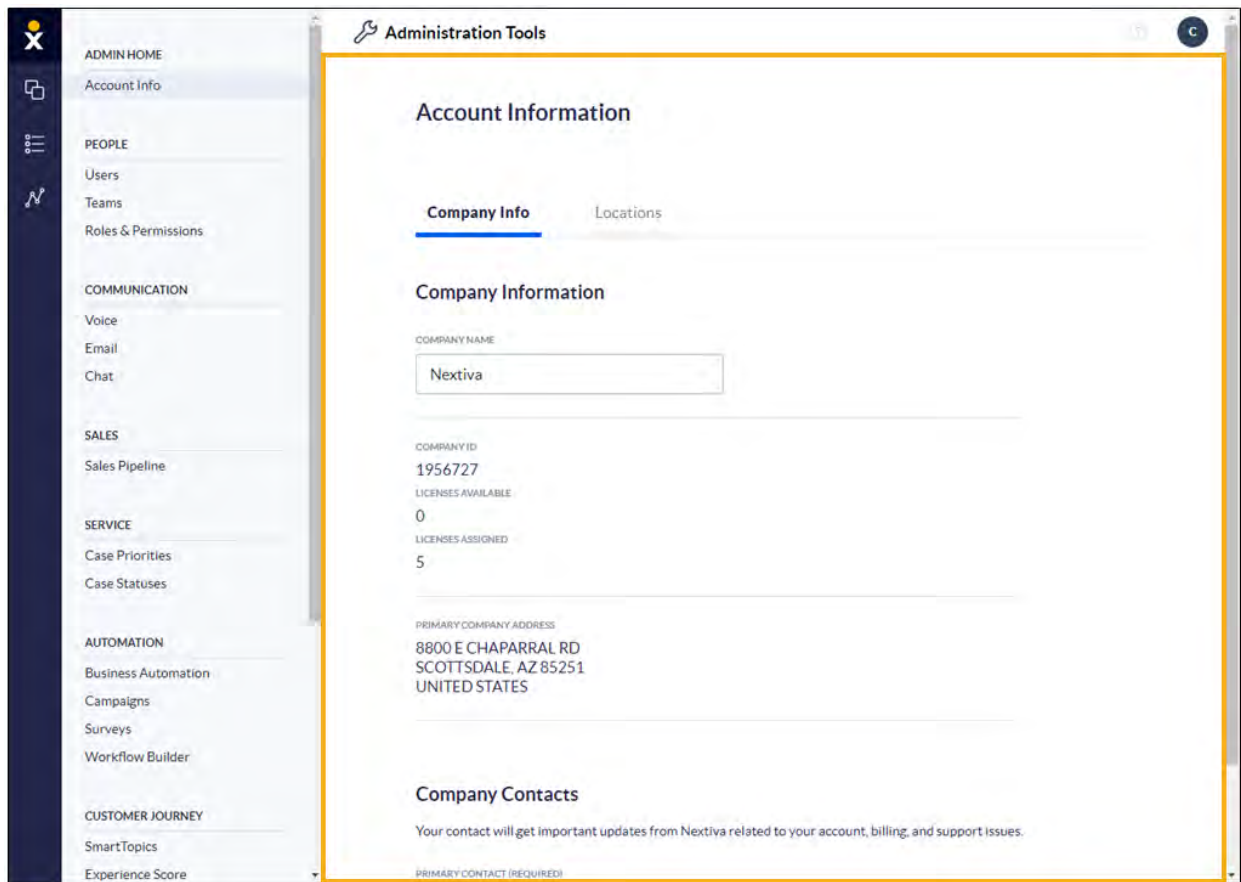
The left navigation panel displays all options for managing and customizing NextOS for your business.

- **Admin Home:** Maintain your NextOS account, add new business locations, and change company branding as you wish.
- **People:** Manage who sees what. Create Users, Teams, and limit access to NextOS.
- **Communication:** How many ways can your customers reach you ~ Set up phone numbers, email addresses, chat options, and SMS.
- **Sales:** It's all about Leads & Opportunities. Customize the unique stages of the sales pipeline the way you want.
- **Service:** Add business-specific fields and options to ensure interactions are tracked to your preference.
- **Automation:** Create powerful business automation using our easy to use templates, or create your own communications, campaigns, and surveys to improve efficiency.
- **Customer Journey:** Create SmartTopics to organize customer interactions and tailor the Account Experience Scale to the business. No better way to understand the customer's experience with your company.
- **Advanced Settings:** Configure advanced customizations to align NextOS with needs unique to any business.
- **Security:** Determine who can and cannot access your NextOS platform.



Main Panel

Admins stay on one easy to use dashboard without having to load additional pages or navigate away from the workspace. Selecting Account Info, for example, opens all of the Account Info options in the Main Panel. Here you can work to build and customize as much or as little as needed.



The screenshot displays the 'Administration Tools' interface. On the left is a dark sidebar with a navigation menu. The main content area is titled 'Administration Tools' and shows the 'Account Information' page. The page has two tabs: 'Company Info' (selected) and 'Locations'. Under 'Company Information', there are several sections: 'COMPANY NAME' with a text input field containing 'Nextiva'; 'COMPANY ID' with the value '1956727'; 'LICENSES AVAILABLE' with the value '0'; 'LICENSES ASSIGNED' with the value '5'; and 'PRIMARY COMPANY ADDRESS' with the address '8800 E CHAPARRAL RD, SCOTTSDALE, AZ 85251, UNITED STATES'. At the bottom, there is a 'Company Contacts' section with a note: 'Your contact will get important updates from Nextiva related to your account, billing, and support issues.' and a label 'PRIMARY CONTACT (REQUIRED)'.

ADMIN HOME
Account Info
PEOPLE
Users
Teams
Roles & Permissions
COMMUNICATION
Voice
Email
Chat
SALES
Sales Pipeline
SERVICE
Case Priorities
Case Statuses
AUTOMATION
Business Automation
Campaigns
Surveys
Workflow Builder
CUSTOMER JOURNEY
SmartTopics
Experience Score

Administration Tools

Account Information

Company Info Locations

Company Information

COMPANY NAME
Nextiva

COMPANY ID
1956727

LICENSES AVAILABLE
0

LICENSES ASSIGNED
5

PRIMARY COMPANY ADDRESS
8800 E CHAPARRAL RD
SCOTTSDALE, AZ 85251
UNITED STATES

Company Contacts

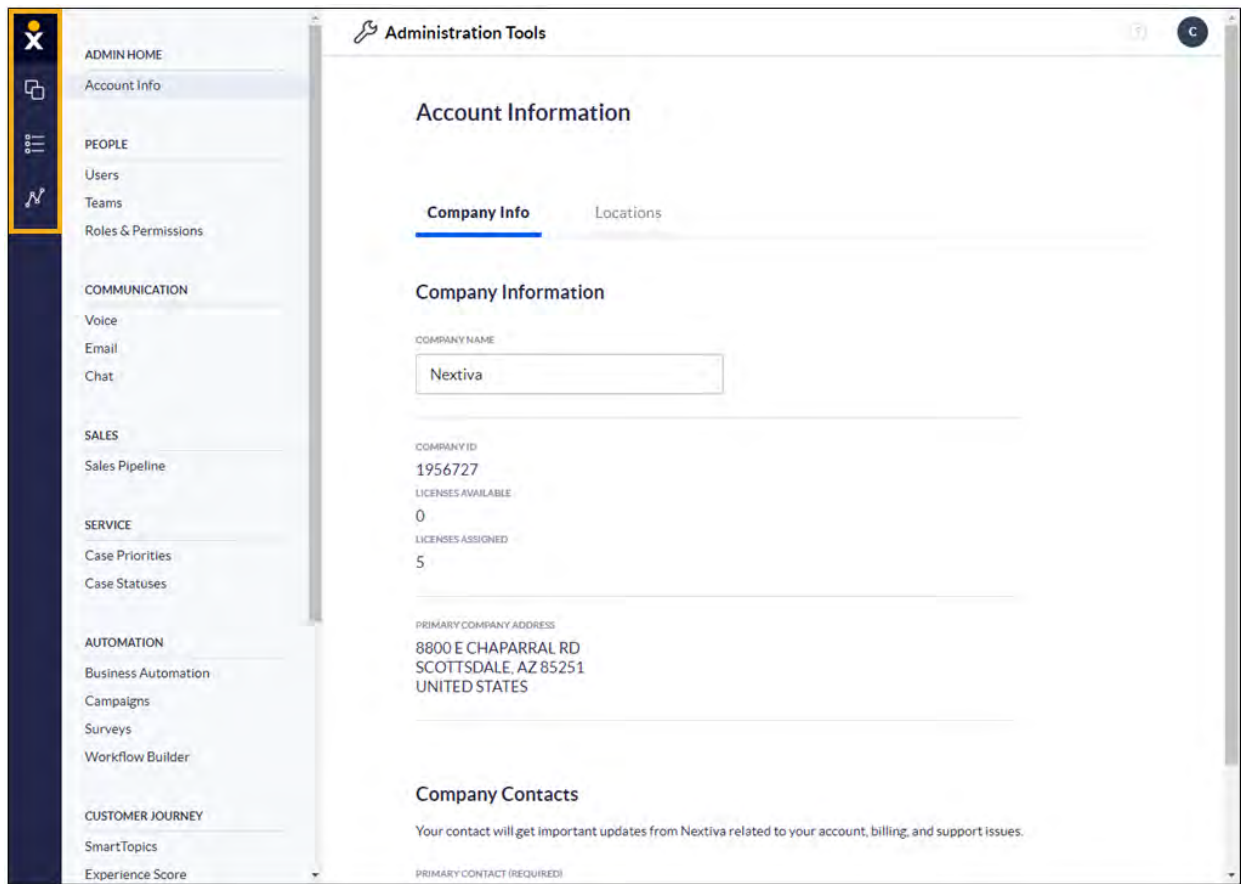
Your contact will get important updates from Nextiva related to your account, billing, and support issues.

PRIMARY CONTACT (REQUIRED)

Main Panel

Applications Menu

To the far left in dark blue, use the Applications Menu to navigate out of Admin Tools to the NextOS Home Page or other NextOS applications (Nextiva CRM, Nextiva Surveys, and NextOS Analytics).



Applications Menu

Teams

First, let's customize Teams within CRM. A *General* Team is built by default, as this is a required field when adding Users to NextOS. A User needs a Team to be created successfully.

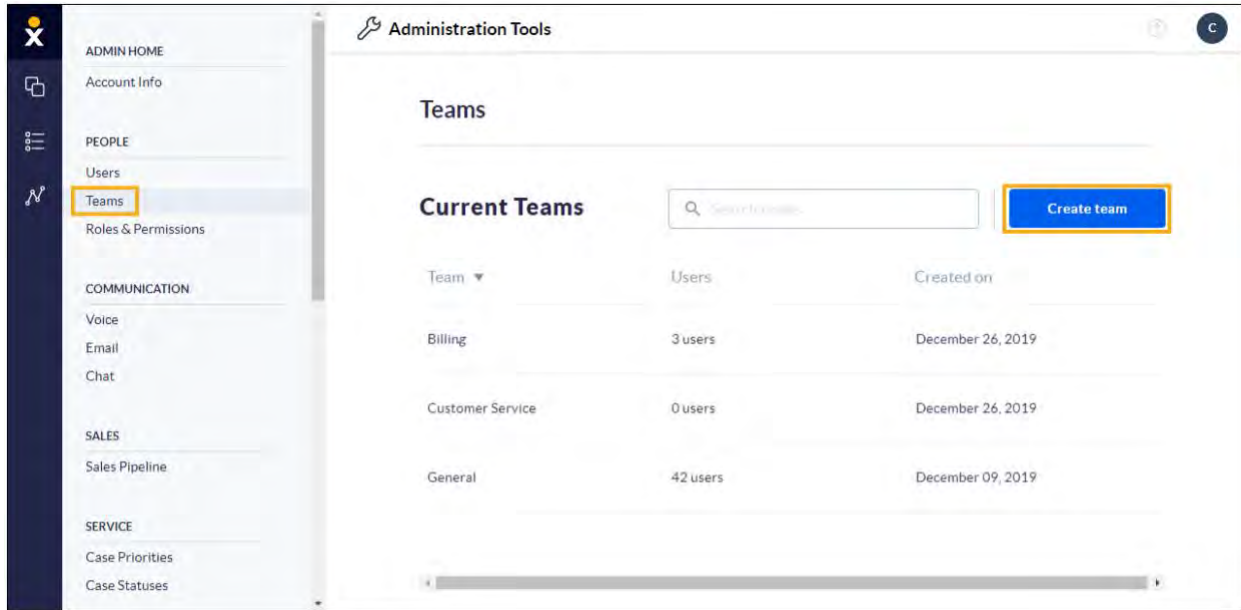
NOTE: Admins can either create Teams first, or assign users to General, then go back to reassign a primary Team after creating Teams.

Assign Cases (aka Tickets, or customer interactions) to a Team or department in your organization, or limit certain Teams from viewing sensitive details, for example. Businesses can also use Teams to group their employees by job function. Let's say we want to assign Cases related to invoices to the Billing team, as well as move password reset Cases to a Support team. You may also want to be sure your Sales Team has limited access to Leads & Opportunities they don't own, as an option.

Creating Teams

Create as many or as few Teams as you like. Additional Teams can be created at any time.

1. Under **People** in the left navigation panel, select **Teams** and click the **Create team** button.



Teams

2. On the **Create new team** form, enter a name for the Team.
3. Assign Users to the Team (click the checkbox)
NOTE: Edit the User Profile to assign a primary team to the User.
4. Click **Create**.

The screenshot displays the 'Create new team' form within the Nextiva Administration Tools. The background shows the 'Administration Tools' menu with categories like ADMIN HOME, PEOPLE, COMMUNICATION, SALES, SERVICE, and AUTOMATION. The 'Teams' section is active, showing a list of 'Current Teams' with columns for 'Team' and 'Users'. The 'Create new team' form is overlaid on the right, featuring a 'TEAM NAME' input field containing 'Sales'. Below this, it shows 'USERS CURRENTLY ASSIGNED TO THIS TEAM' with two users: Alva Bertolin and Amos Jens. A 'Search and assign users to this team' section includes a search bar and a list of three users: Alva Bertolin (checked), Amos Jens (checked), and Andrew Niccol (unchecked). The form concludes with 'Cancel' and 'Create' buttons.

Create New Team Form

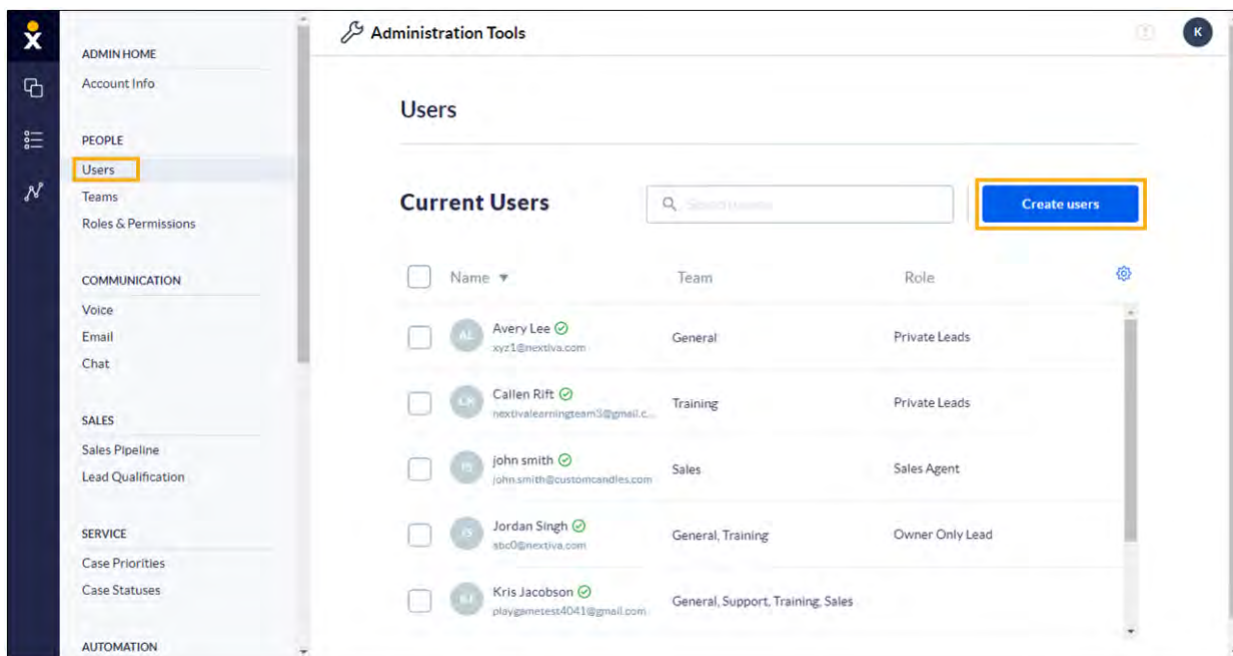
Users

Next, you'll want to give your Users access to Nextiva CRM by creating individual User profiles and assigning a license to each. You'll need the User's full name, email, and Team(s).

Creating a User Profile

Each User must have a User Profile to access any part of NextOS.

1. Under **People** in the left navigation panel, select **Users**.
2. **Users > Create users**.



Users Page

3. Complete the fields on the **Add a user** form and click **Create**.

NOTE: Required fields include **First Name**, **Last Name**, **Email Address**, and **Primary Team**.

The image shows a screenshot of the Nextiva Administration Tools interface. On the left is a navigation sidebar with categories like ADMIN HOME, PEOPLE, COMMUNICATION, SALES, SERVICE, and AUTOMATION. The main area is titled 'Administration Tools' and 'Users'. A 'Create users' modal window is open, titled 'Add a user'. It contains the following fields and options:

- FIRST NAME:** Lynn
- LAST NAME:** Ivers
- EMAIL ADDRESS:** lyvers@nextiva.com
- ROLE:** Sales Agent (dropdown)
- PRIMARY TEAM:** Sales (dropdown)
- LOCATION:** Default (dropdown)
- TIME ZONE:** (UTC-07:00) Arizona (dropdown)

At the bottom of the modal are 'Cancel' and 'Create' buttons.

Add a User Form

Assigning a License to a User

Assign a license to each User needing to access Nextiva CRM. Edit the User profile to assign a license:

1. Under **People** in the left navigation panel, select **Users**.
2. Hover over the User, click the **Action** button, and select **Edit Profile**.

The screenshot shows the 'Administration Tools' interface with the 'Users' section active. A table lists 'Current Users' with columns for Name, Team, and Role. An 'Actions' dropdown menu is open for the user 'Avery Lee', with the 'Edit Profile' option highlighted in a yellow box. Other options in the menu include 'Voice Setup'.

Name	Team	Role
Avery Lee xyz1@nextiva.com	General	Private Leads
Callen Rift nextivallearningteam3@gmail.c...	Training	Private Leads
John smith john.smith@customcandles.com	Sales	Sales Agent
Jordan Singh abc0@nextiva.com	General, Training	Owner Only Lead
Kris Jacobson playgametest4041@gmail.com	General, Support, Training, Sales	
Morgan Roberts rsg123@nextiva.com	Sales	Private Leads
Quinn Tuplet		

Edit Profile Option

3. Scroll down to **Licenses**. Click **Add License**.
4. Select the desired license. Click **Save**.

The screenshot shows the 'Administration Tools' interface with the 'Users' section active. A modal window is open for the user 'Avery Lee', showing the 'Licenses' section. The 'Add License' option is highlighted in a yellow box. A message above the section states: 'Missing license. Users need a license to get started. Click add license below'. Below this, there is a search bar and a list of licenses, including 'Nextiva Customer Relationship Suite Enterprise: Additional U...' and 'Nextiva Customer Relationship Suite Enterprise: Base User'. The 'Save' button is highlighted in a blue box.

Add License

5. Edit the User Profile if desired:
 - **Reset the password** for the User.
 - Revise the **User Information** (e.g. Last Name, Role, Primary Phone Number, and so on).
 - Grant or revoke **Super Admin** privileges.
 - Assign an additional **Team** to the User.
6. Click Save.

User Access

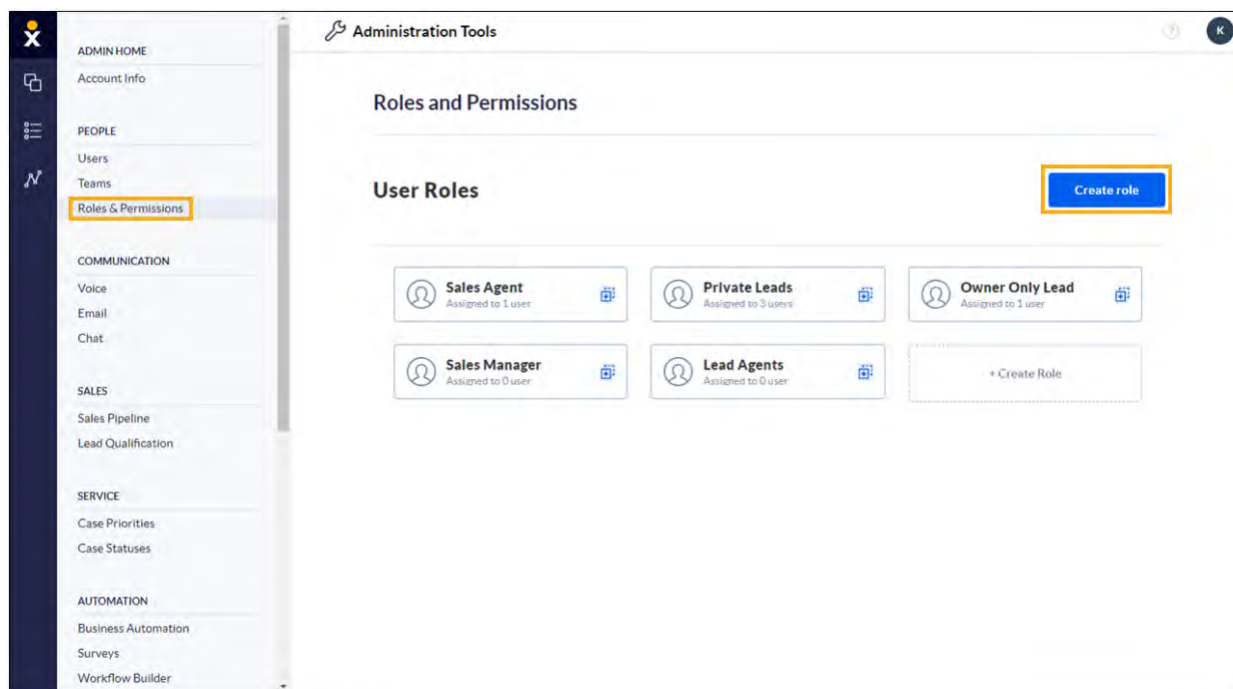
Many businesses choose to configure User access based on job responsibilities. For example, you might not want support agents to have access to sales information, or sales agents to have administrative permissions, as well.

TIP: Save time by grouping permissions into Roles and assigning them to Users. Create and assign Roles to restrict access to administrator functions, viewing Cases, editing Opportunities, and much more.

Creating Roles

Limit scope of view or add Admin role to any User.

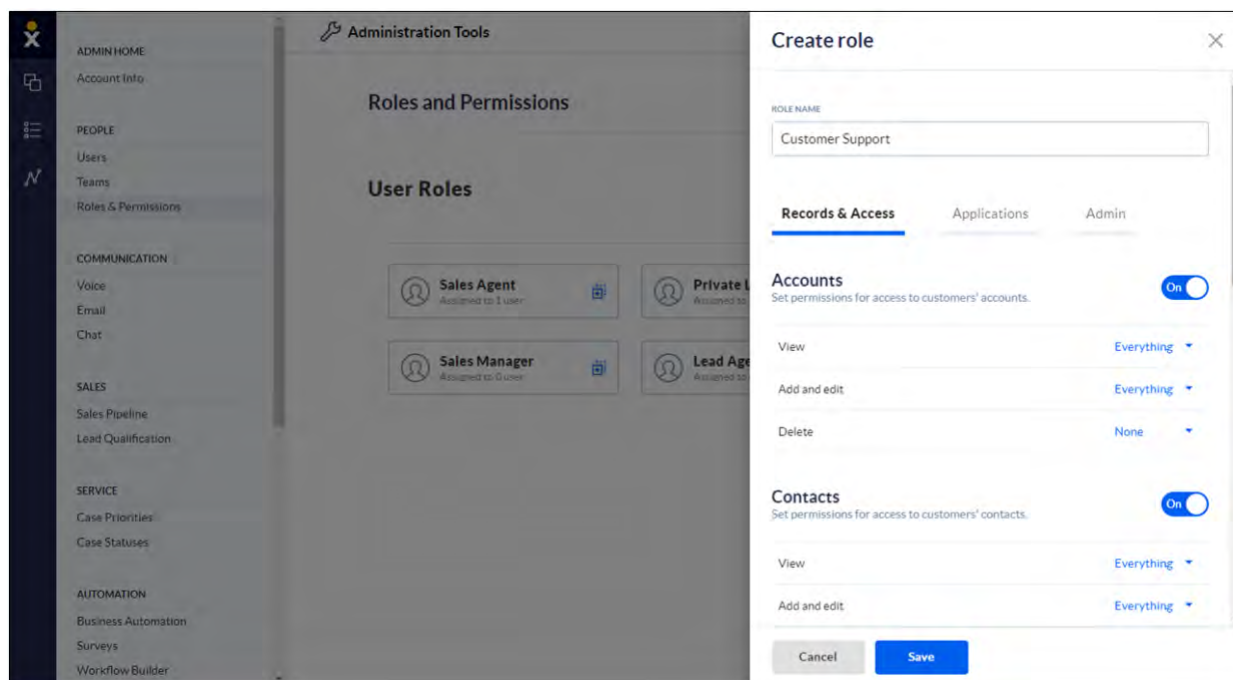
1. Under **People** in the left navigation panel, click **Roles & Permissions**.
2. From the **Roles and Permissions** page, click **Create role**.



Roles & Permissions

3. On the **Create role** form, enter a name for the Role in the **Role Name** field.
4. Set permissions using the following tabs. Click **Save**:
 - **Records & Access:** Control whether Users can access Accounts, Contacts, Leads, Products, Opportunities, Cases, and custom records (if applicable) in Nextiva CRM. Then, define how Users access each area by setting permissions to view, add and edit, and delete records.
 - **Applications:** Grant or deny Users access to Dashboard Builder and Analytics (Reports). Define how Users access Nextiva Surveys by setting permissions to view, add and edit, and delete records.
 - **Admin:** Allow or prohibit Users from performing various administrative tasks on the NextOS platform.

NOTE: Use **On/Off** to grant or deny access to areas of NextOS.



Create Role Form

Assigning Roles

Assigning a Role to each User will dictate what functions and views they can access.

1. Under **People** in the left navigation panel, select **Users**.
2. Hover over the desired User, click **Actions**, and select **Edit Profile**.

The screenshot shows the 'Administration Tools' interface with a sidebar on the left containing navigation options like 'ADMIN HOME', 'PEOPLE', 'COMMUNICATION', 'SALES', 'SERVICE', and 'AUTOMATION'. The main content area is titled 'Users' and displays a table of 'Current Users'. The table has columns for 'Name', 'Team', and 'Role'. An 'Actions' dropdown menu is open for the user 'Avery Lee', with 'Edit Profile' highlighted. Other users listed include Callen Rift, John Smith, Jordan Singh, Kris Jacobson, Morgan Roberts, and Quinn Tuplet.

Name	Team	Role
Avery Lee	General	Private Leads
Callen Rift	Training	Private Leads
John Smith	Sales	Sales Agent
Jordan Singh	General, Training	Owner Only Lead
Kris Jacobson	General, Support, Training, Sales	
Morgan Roberts	Sales	Private Leads
Quinn Tuplet		

Edit Profile

3. Choose a Role from the drop-down menu. Click **Save**.

The screenshot shows the 'Avery Lee' user profile edit form. The 'User Information' section includes fields for 'FIRST NAME' (Avery), 'LAST NAME' (Lee), 'ROLE', 'PHONE' (+1 4805556420), 'LOCATION', and 'TIME ZONE'. The 'ROLE' dropdown menu is open, showing a list of roles: 'Non Specified', 'Lead Agents', 'Owner Only Lead', 'Private Leads', 'Sales Agent', and 'Sales Manager'. The 'Save' button is highlighted in blue.

Role Drop-Down Menu

SmartTopics

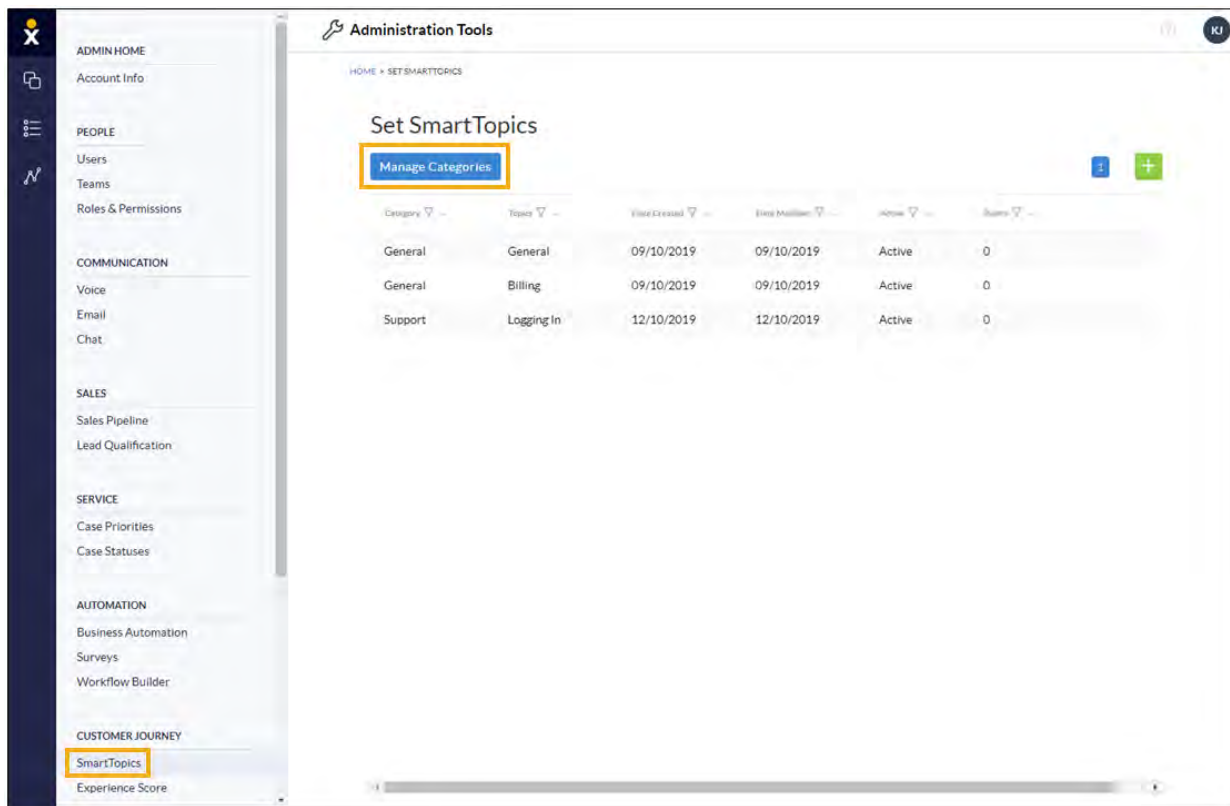
SmartTopics are the easiest way any business can categorize interactions to better understand the customer experience. SmartTopics are completely customizable based on how you do business. Assign a unique topic (tied to a score) to each interaction with customers.

When we organize Cases by topic, which then automatically calculates and applies changes to the **Account Experience Score**, we can quickly measure how well a business is serving each Account. This gives businesses a holistic view of any and all Accounts over time.

Creating Categories

SmartTopic Categories help companies keep SmartTopics organized. For example, businesses can create a category related to Support and another for Sales. The **General** category is available by default.

1. In the left navigation panel, under **Customer Journey**, click **SmartTopics**, then click the **Manage Categories** button.

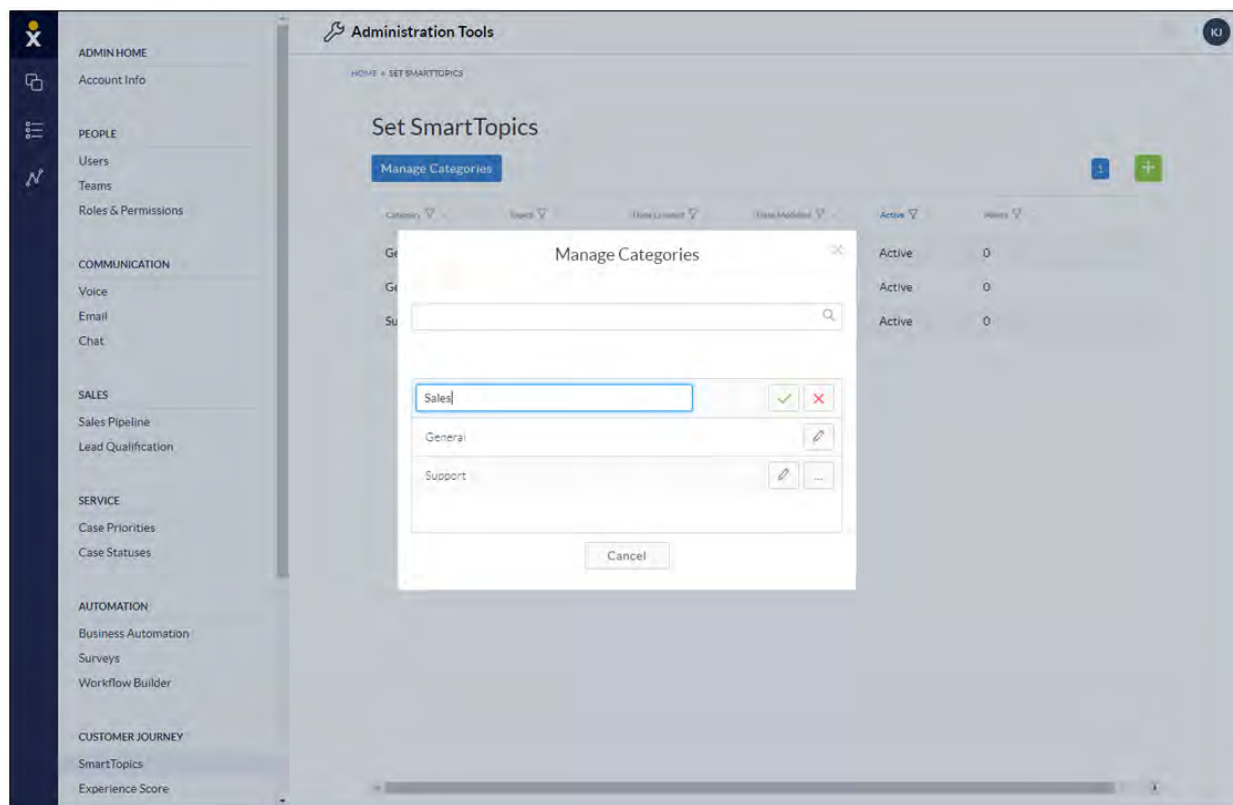


The screenshot displays the 'Administration Tools' interface. On the left is a navigation sidebar with categories like ADMIN HOME, PEOPLE, COMMUNICATION, SALES, SERVICE, AUTOMATION, and CUSTOMER JOURNEY. The 'SmartTopics' option under CUSTOMER JOURNEY is highlighted with a blue box. The main content area is titled 'Set SmartTopics' and features a 'Manage Categories' button, also highlighted with a blue box. To the right of this button are two icons: a blue square with a white plus sign and a green square with a white plus sign. Below these is a table with columns for Category, Topic, First Created, Last Modified, Status, and Count.

Category	Topic	First Created	Last Modified	Status	Count
General	General	09/10/2019	09/10/2019	Active	0
General	Billing	09/10/2019	09/10/2019	Active	0
Support	Logging In	12/10/2019	12/10/2019	Active	0

SmartTopics

2. On the pop-up window, click **+New Category**, enter a category name, and click the **green check mark**.



New Category

Creating Topics

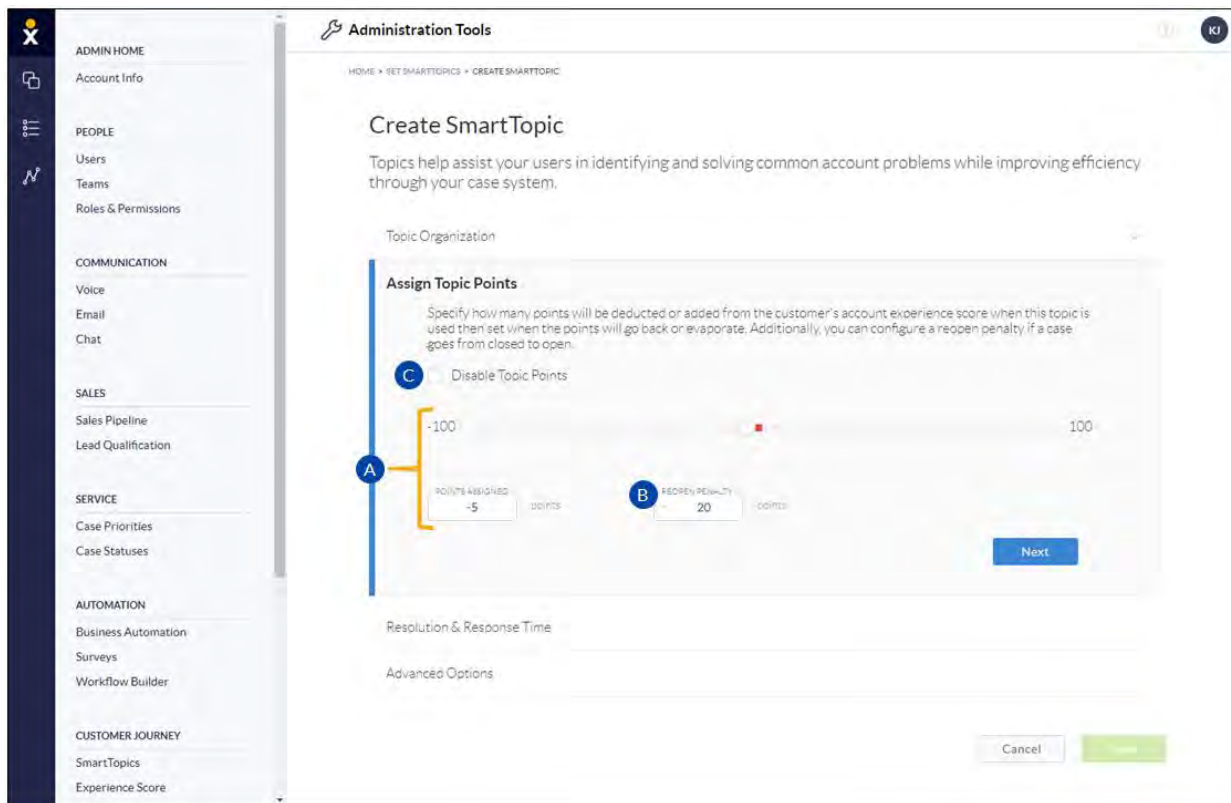
Agents assign SmartTopics to each customer interaction to record and analyze the types of requests received.

1. In the left navigation panel, under **Customer Journey**, click **SmartTopics**, then click the **green plus (+)** button.
2. Complete the **Topic Organization** fields and click **Next**.

The screenshot shows the 'Create SmartTopic' page in the Administration Tools interface. The page has a sidebar on the left with navigation options: ADMIN HOME, Account Info, PEOPLE (Users, Teams, Roles & Permissions), COMMUNICATION (Voice, Email, Chat), SALES (Sales Pipeline, Lead Qualification), SERVICE (Case Priorities, Case Statuses), and AUTOMATION (Business Automation, Surveys, Workflow Builder). The main content area is titled 'Create SmartTopic' and includes a 'Topic Organization' section. This section has three main input areas: 'TOPIC NAME' (labeled A) with the value 'Web Site', 'CATEGORY' (labeled B) with a dropdown menu showing 'Support' and a plus icon, and 'DEPARTMENT' (labeled C) with a dropdown menu showing 'General', 'Sales', and 'Support', each with an 'X' icon to remove it. A 'Next' button is located to the right of the 'DEPARTMENT' dropdown. Below the 'Topic Organization' section are three sections: 'Assign Topic Points', 'Resolution & Response Time', and 'Advanced Options', each with a text input field. At the bottom right, there are 'Cancel' and 'Next' buttons.

Topic Organization

- A. Enter a **name** for the SmartTopic.
 - B. Assign the SmartTopic to a **category**. Click the **plus (+)** icon to create a new category on the spot.
 - C. Specify the **department(s)** for which the SmartTopic is relevant. By default, all departments are selected. Remove individual departments by clicking the corresponding **X**.
3. Complete the **Assign Topic Points** fields (see next screen shot). Click **Next**.



Assign Topic Points

- A. Use the slider or **Points Assigned** field to specify the number of points to add or deduct from the customer's Account Experience Score when the User selects this topic for a Case.
 Example #1: A caller reaches support to ask for a Password Reset. Since this is not a dire request, we could assign it a minimal negative score.
 Example #2: A chat prospect is threatening to cancel if they don't receive their shipment soon. This should have a very, very low score, perhaps even -100.
- B. In the **Reopen Penalty** field, specify the number of points to deduct from the Account Experience Score if the Case is reopened.
 Example #1: Customer is calling for a Password Reset and has had to call back numerous times in a short amount of time. Even though a Password Reset isn't normally a relationship damager, it could become one if not resolved quickly.
- C. Select the **Disable Topic Points** checkbox to turn off the use of points for this SmartTopic.

4. In the **Resolution & Response Time** section, select time limits for resolution. Select the **Disable Overage Penalty Points** checkbox to turn off point deductions.

The screenshot shows the 'Create Smart Topic' configuration page in the 'Administration Tools' section. The page is titled 'Create Smart Topic' and includes a description: 'Topics help assist your users in identifying and solving common account problems while improving efficiency through your case system.' The page is divided into several sections: 'Topic Organization', 'Assign Topic Points', 'Resolution & Response Time', and 'Advanced Options'. The 'Resolution & Response Time' section is highlighted with a blue border and contains the following settings:

- Expected Resolution Time:** 1 days
- Email Response Time:** 1 hours
- Show Handle Time:** 60 seconds
- Overall Overage Penalty:** 50
- Queue Overage Penalty:** 10
- Queue Overage Penalty:** 5

The 'Disable Overage Penalty Points' checkbox is checked. A 'Next' button is located at the bottom right of the 'Resolution & Response Time' section. At the bottom of the page, there are 'Cancel' and 'Save' buttons.

Resolution & Response Time

5. Click **Save**.

Account Information

All of your personal Account information is accessible in Administration Tools under **Admin Home > Account Info**. Administrators can update the account information, manage locations and branding.

Updating Account Information

Administrators may change the company name or the name of the primary contact.

1. In the left navigation panel, click **Account Info** under **Admin Home**.
2. On the **Company Info** tab, change the company name or the primary contact, and click **Save**.

The screenshot displays the 'Administration Tools' interface. On the left, the 'ADMIN HOME' menu has 'Account Info' highlighted. The main content area shows the 'Account Information' page with three tabs: 'Company Info', 'Locations', and 'Branding'. The 'Company Info' tab is active. Under 'Company Information', the 'COMPANY NAME' field is highlighted with a yellow box and contains the text 'Nextiva'. Below this, the 'COMPANY ID' is '3188679', 'LICENSES ASSIGNED' is '2', and 'PRIMARY COMPANY ADDRESS' is '8800 E CHAPARRAL RD, SCOTTSDALE, AZ 85250, UNITED STATES'. At the bottom, the 'PRIMARY CONTACT (REQUIRED)' field is highlighted with a yellow box and contains 'Kris Jacobson'. 'Cancel' and 'Save' buttons are visible at the bottom of the form.

Company Info Tab