# 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

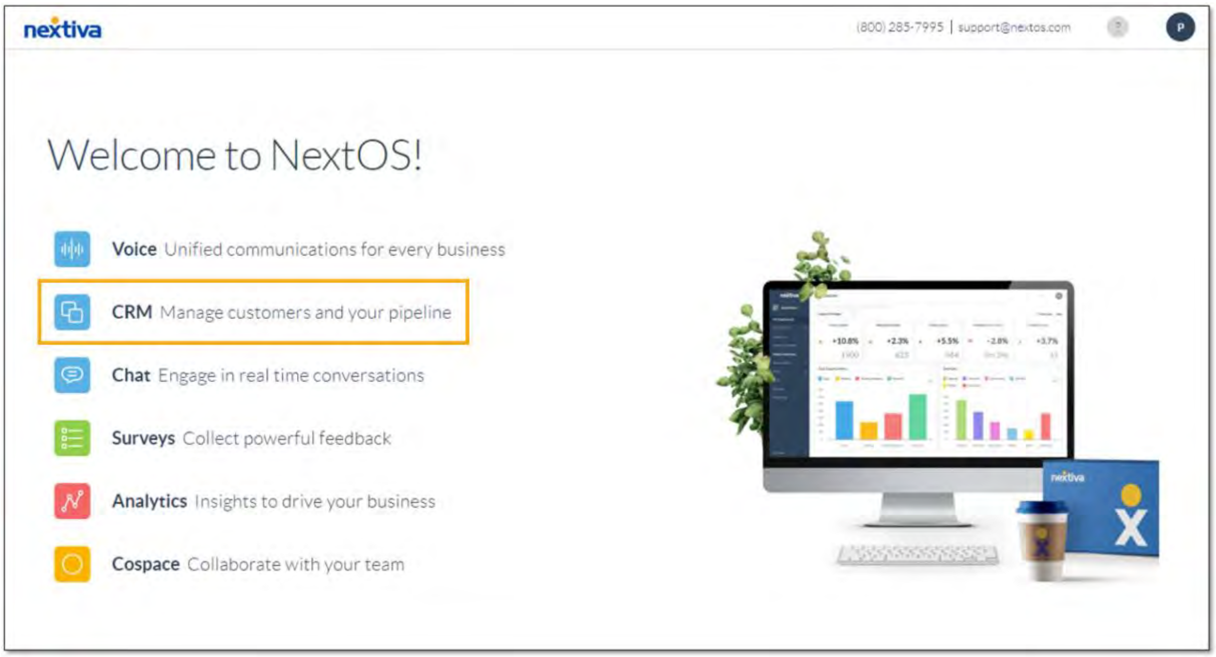
Use Administration Tools in Nextiva CRM to manage and customize NextOS for the business. Some tasks include:

- 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

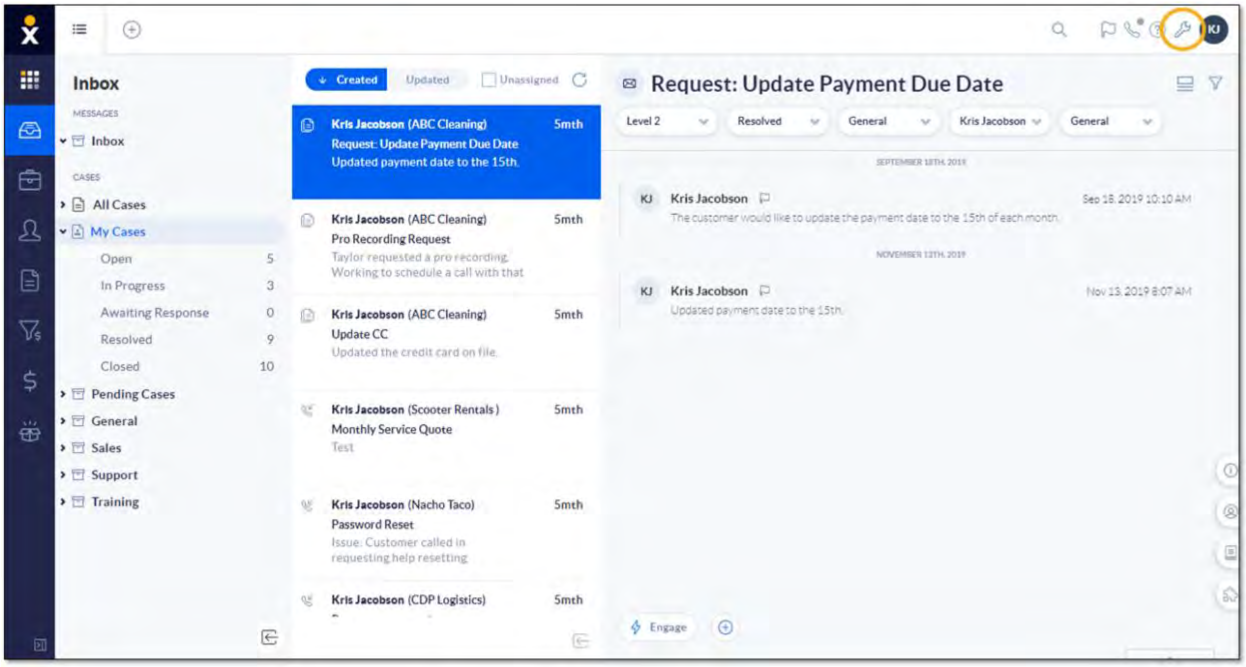
## Accessing Administration Tools

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




*NextOS Home Page*

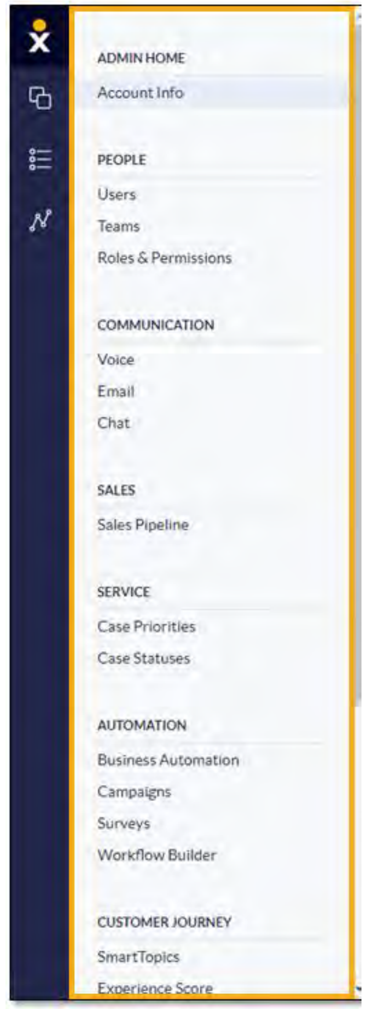
3. Click the **Administration Tools** (wrench) icon at the top-right corner of the Nextiva CRM window.




*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.



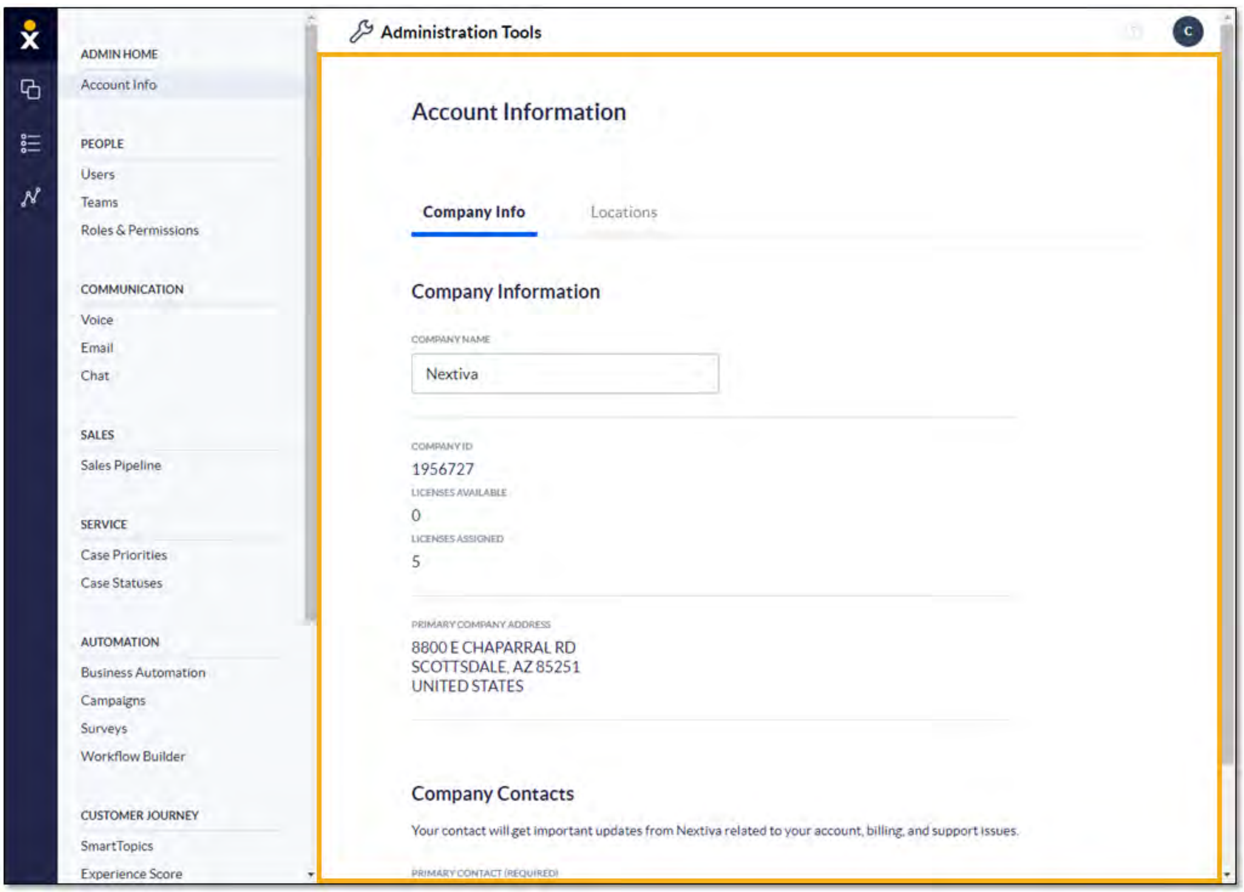

## Left Navigation Panel

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

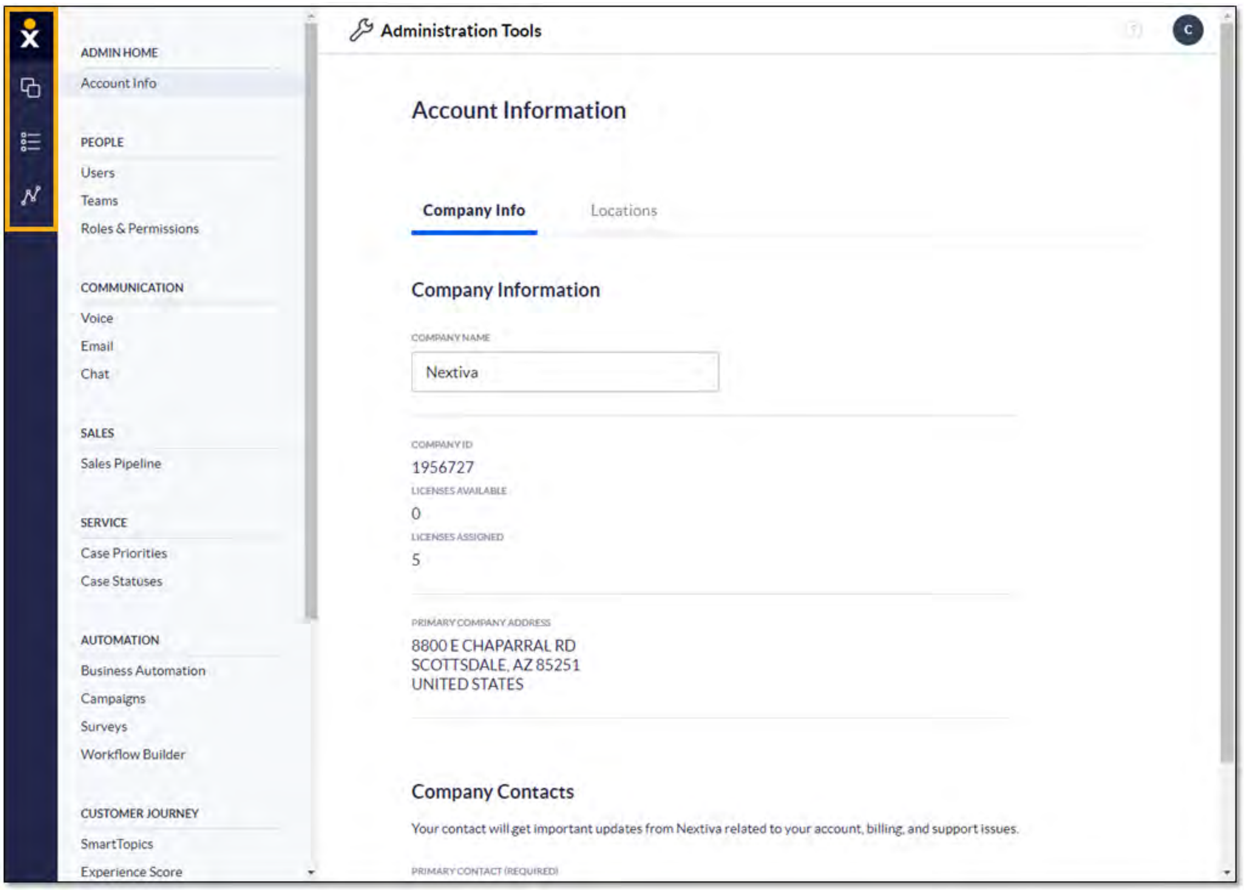
Admins stay on one easy to use dashboard without having to load additional pages or navigate away from the workspace. Selecting Account Info, for example, opens all of the Account Info options in the Main Panel. Here you can work to build and customize as much or as little as needed.




*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.

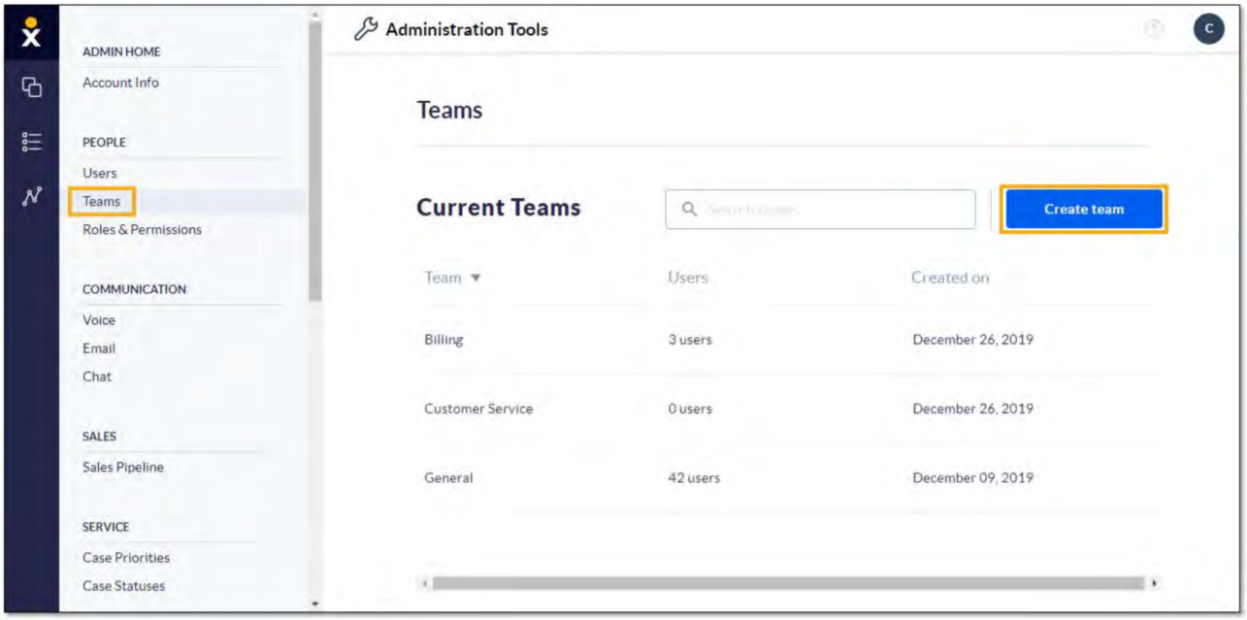
> **NOTE:** Admins can either create Teams first, or assign users to General, then go back to reassign a primary Team after creating Teams.

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.

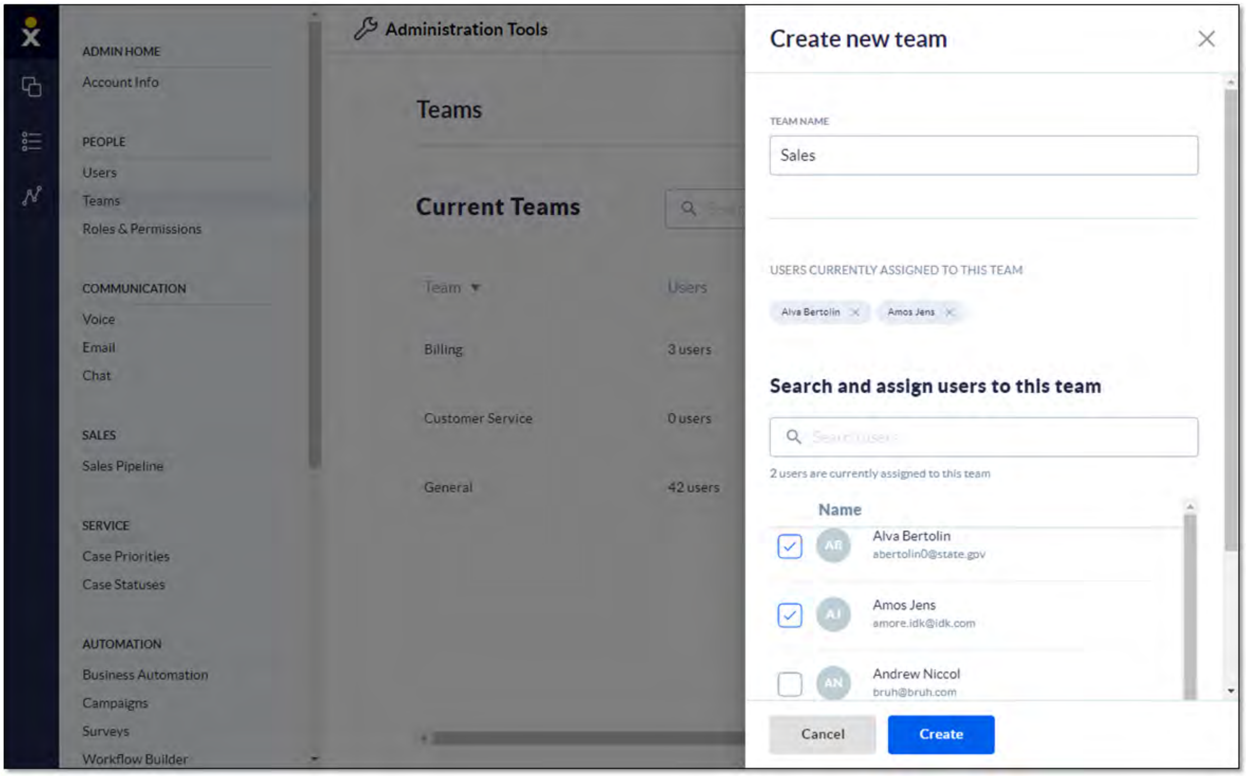



*Teams*

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**.




*Create New Team Form*

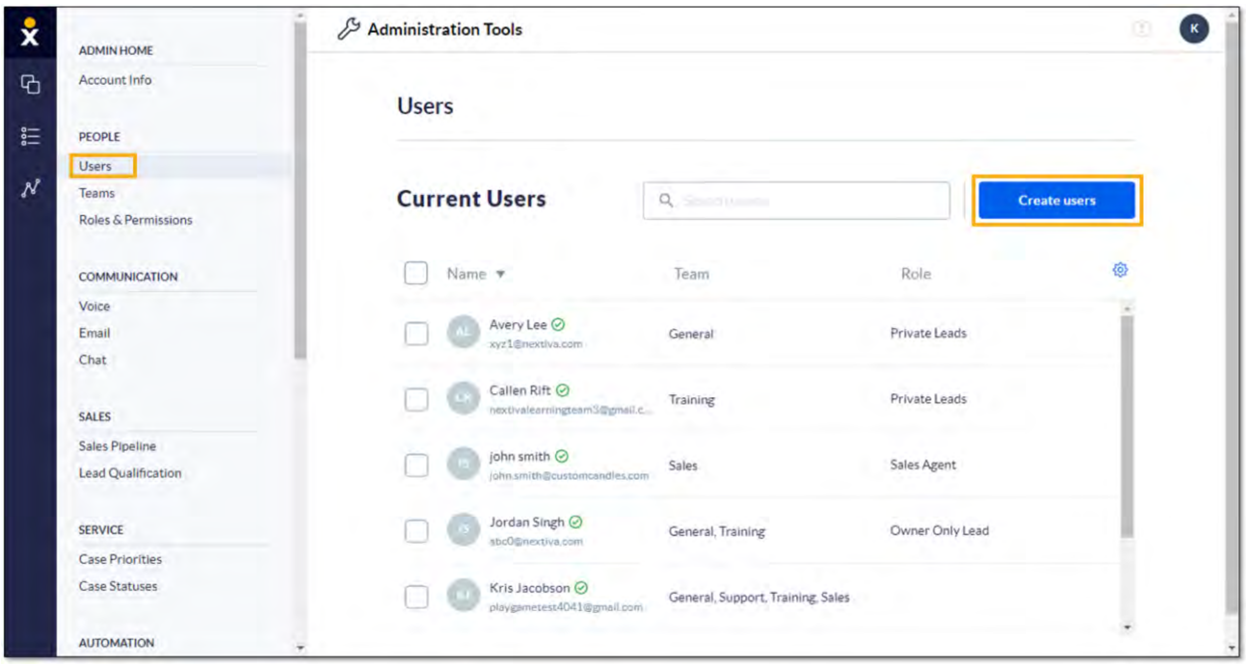
## Users

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.

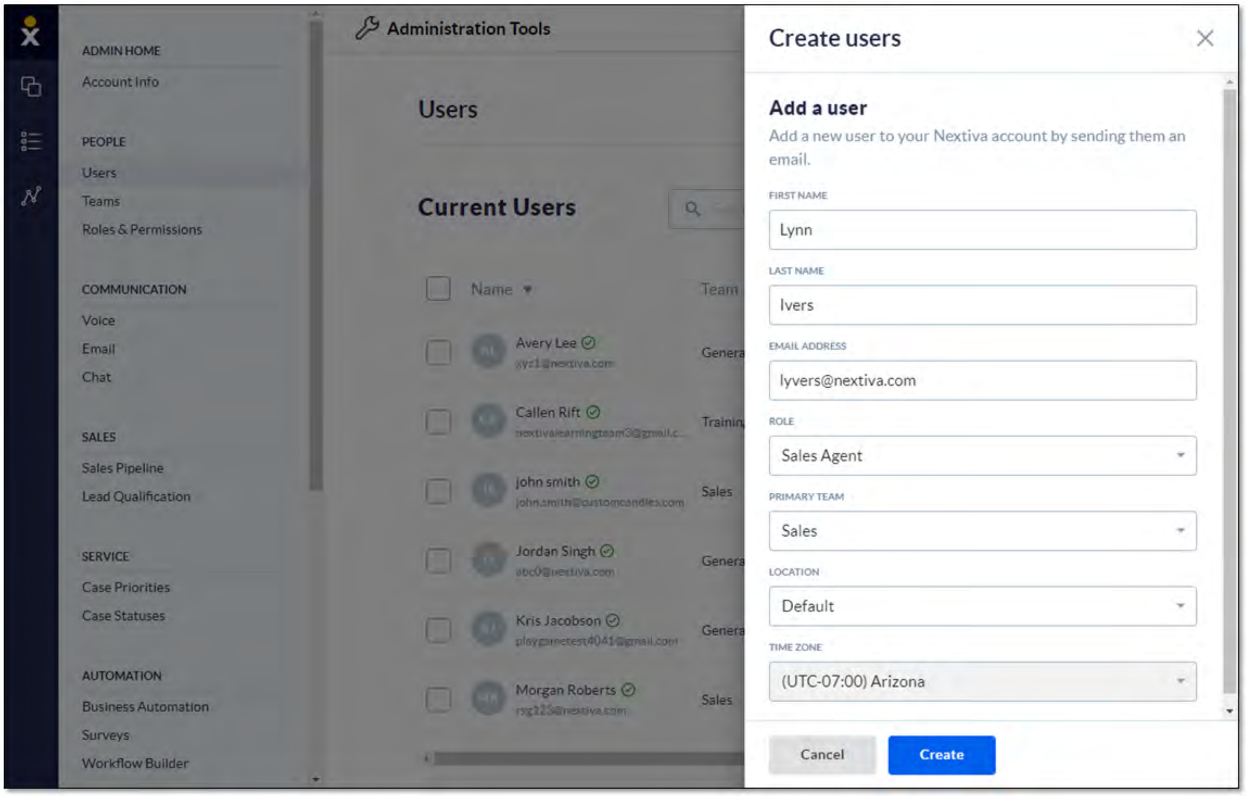
1. Under **People** in the left navigation panel, select **Users**.
2. **Users** > **Create users**.




*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**.

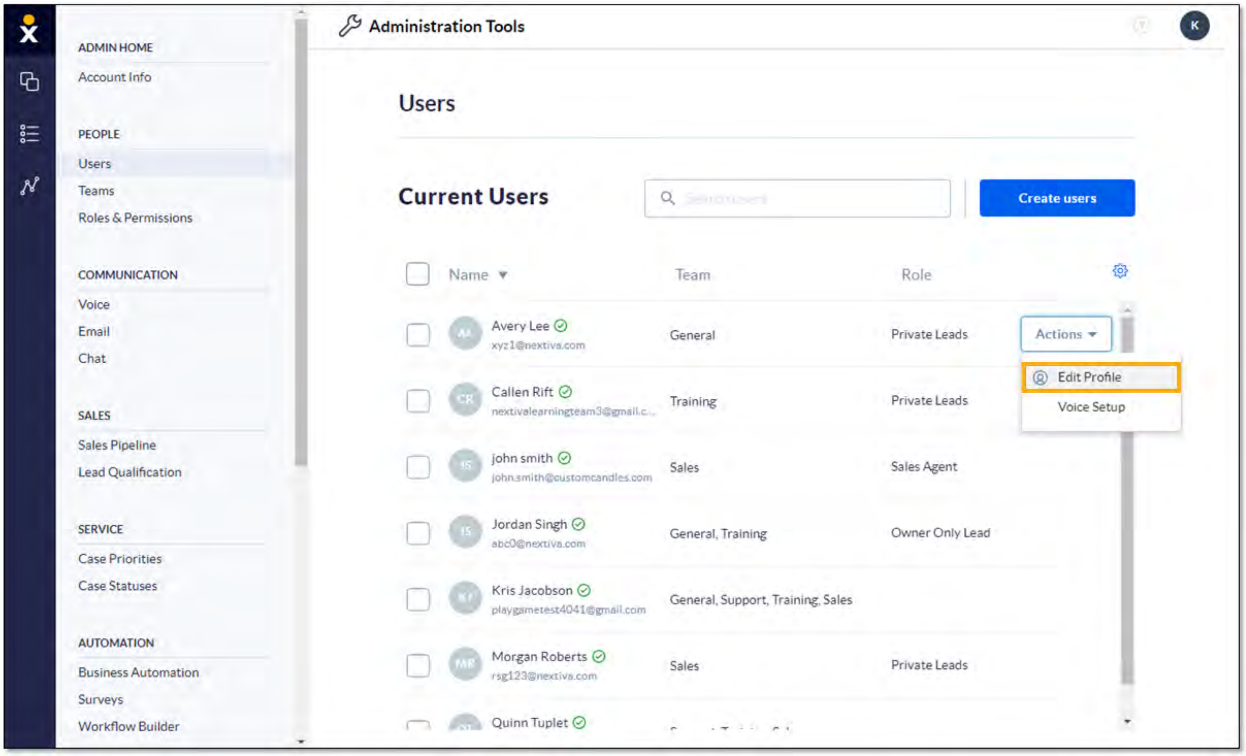



*Add a User Form*

## Assigning a License to a User

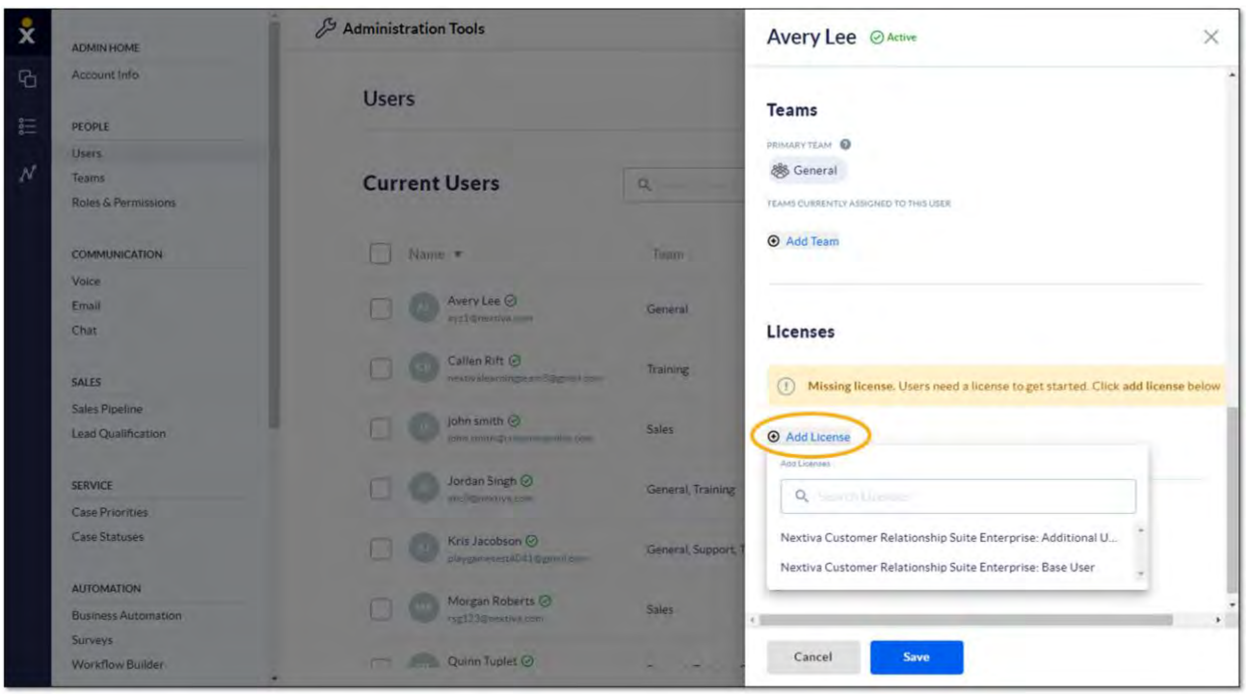
Assign a license to each User needing to access Nextiva CRM. Edit the User profile to assign a license:

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




*Edit Profile Option*

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




*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

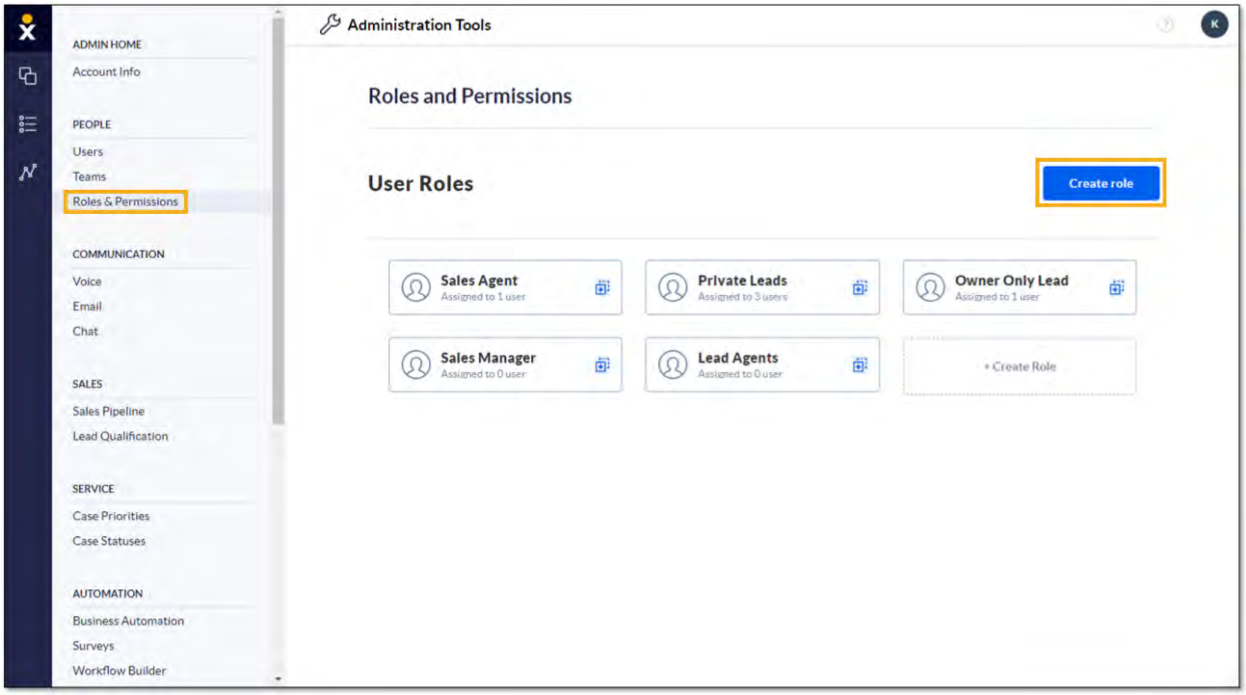
Many businesses choose to configure User access based on job responsibilities. For example, you might not want support agents to have access to sales information, or sales agents to have administrative permissions, as well.

> **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.

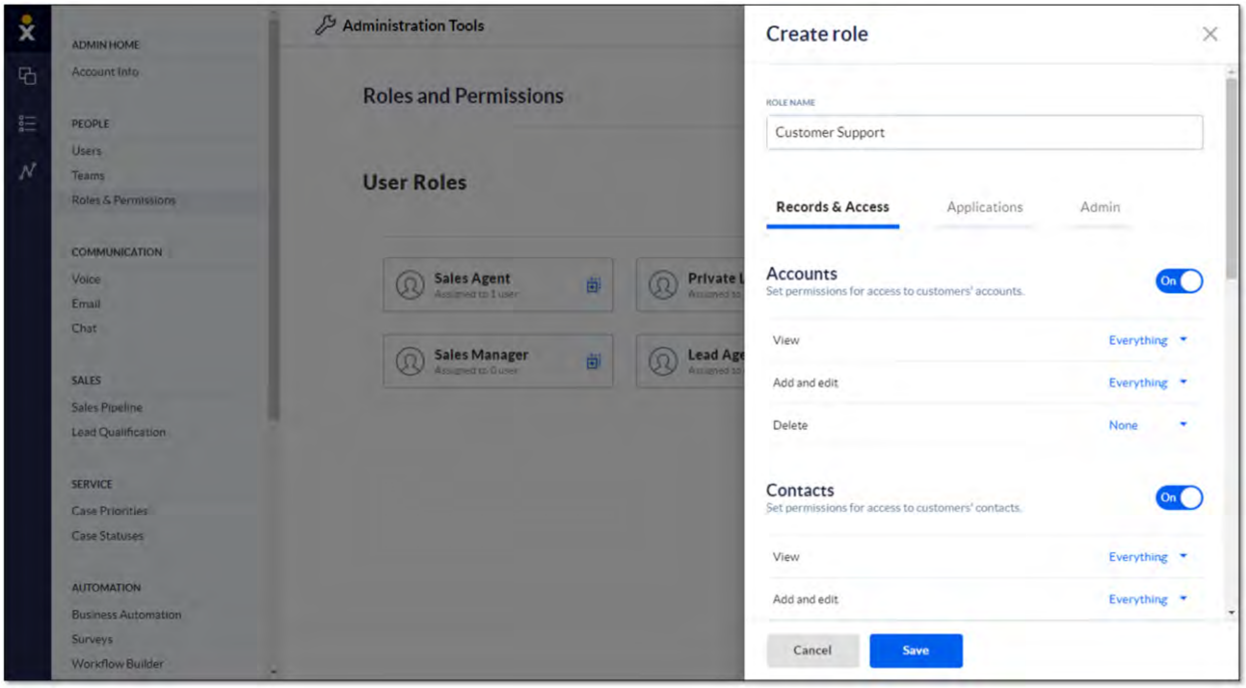
1. Under **People** in the left navigation panel, click **Roles & Permissions**.
2. From the **Roles and Permissions** page, click **Create role**.




*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.

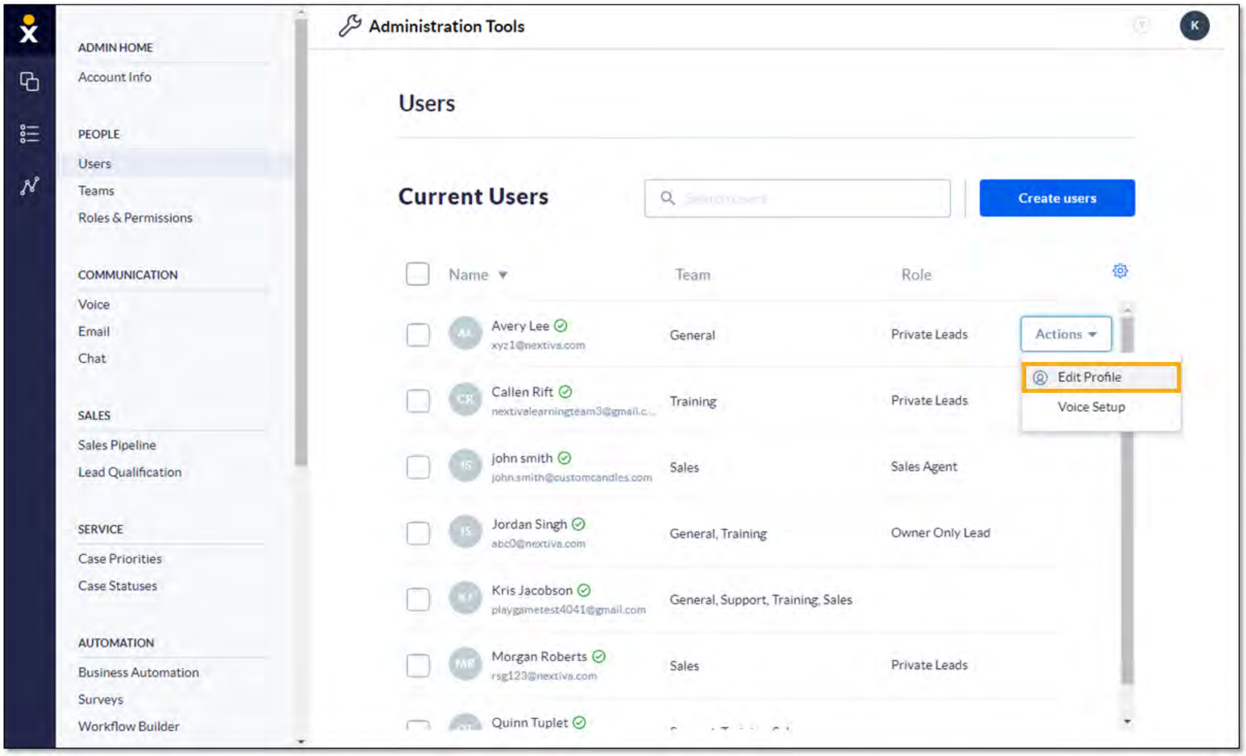



*Create Role Form*

## Assigning Roles

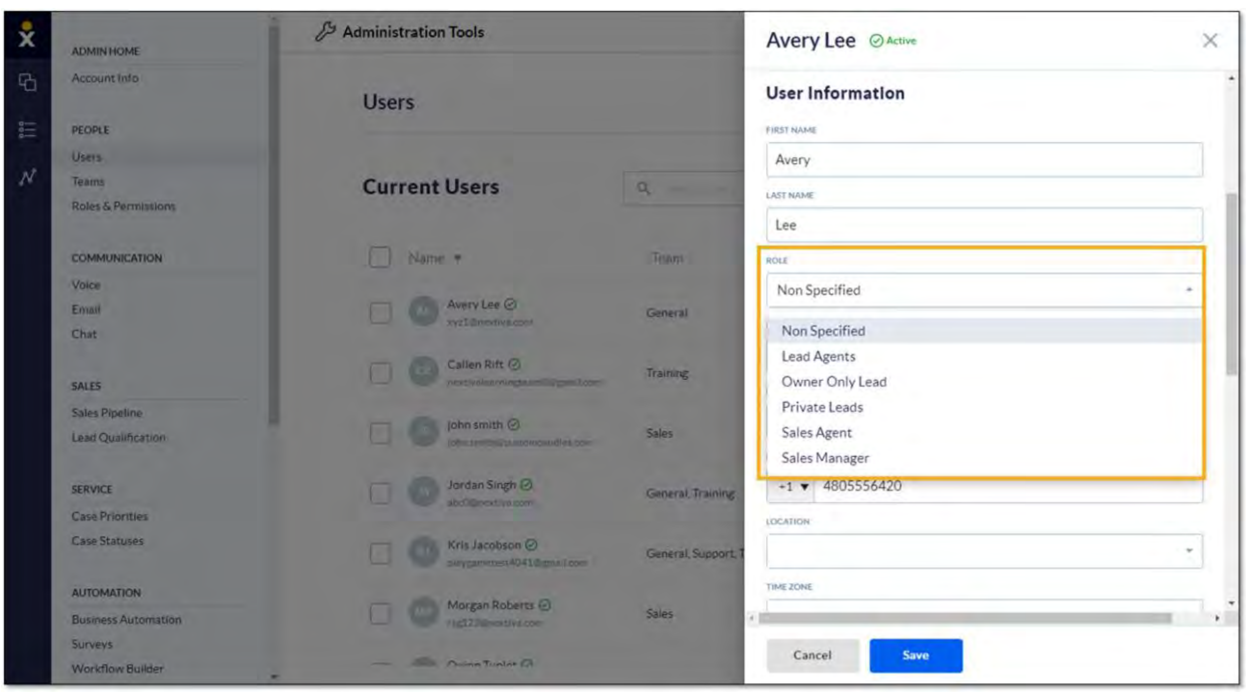
Assigning a Role to each User will dictate what functions and views they can access.

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




*Edit Profile*

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




*Role Drop-Down Menu*

# SmartTopics

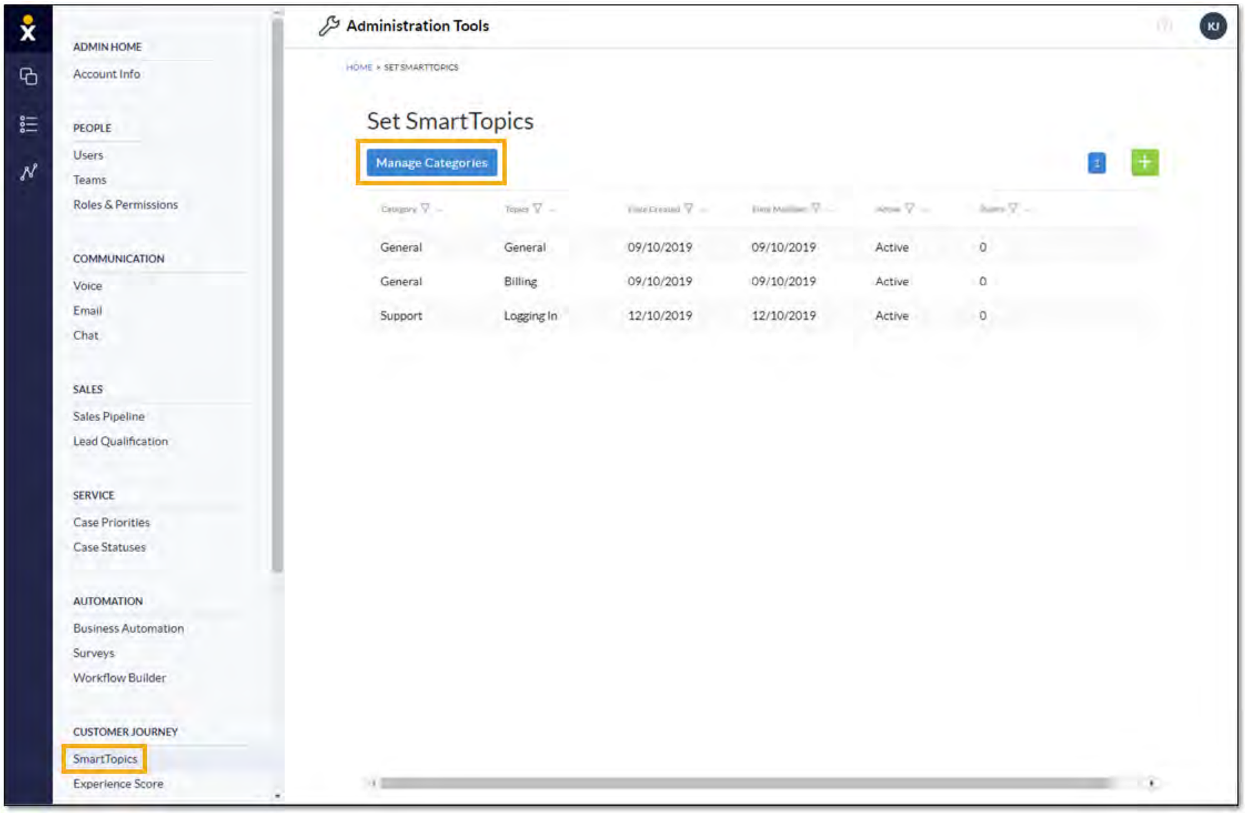
SmartTopics are the easiest way any business can categorize interactions to better understand the customer experience. SmartTopics are completely customizable based on how you do business. Assign a unique topic (tied to a score) to each interaction with customers.

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

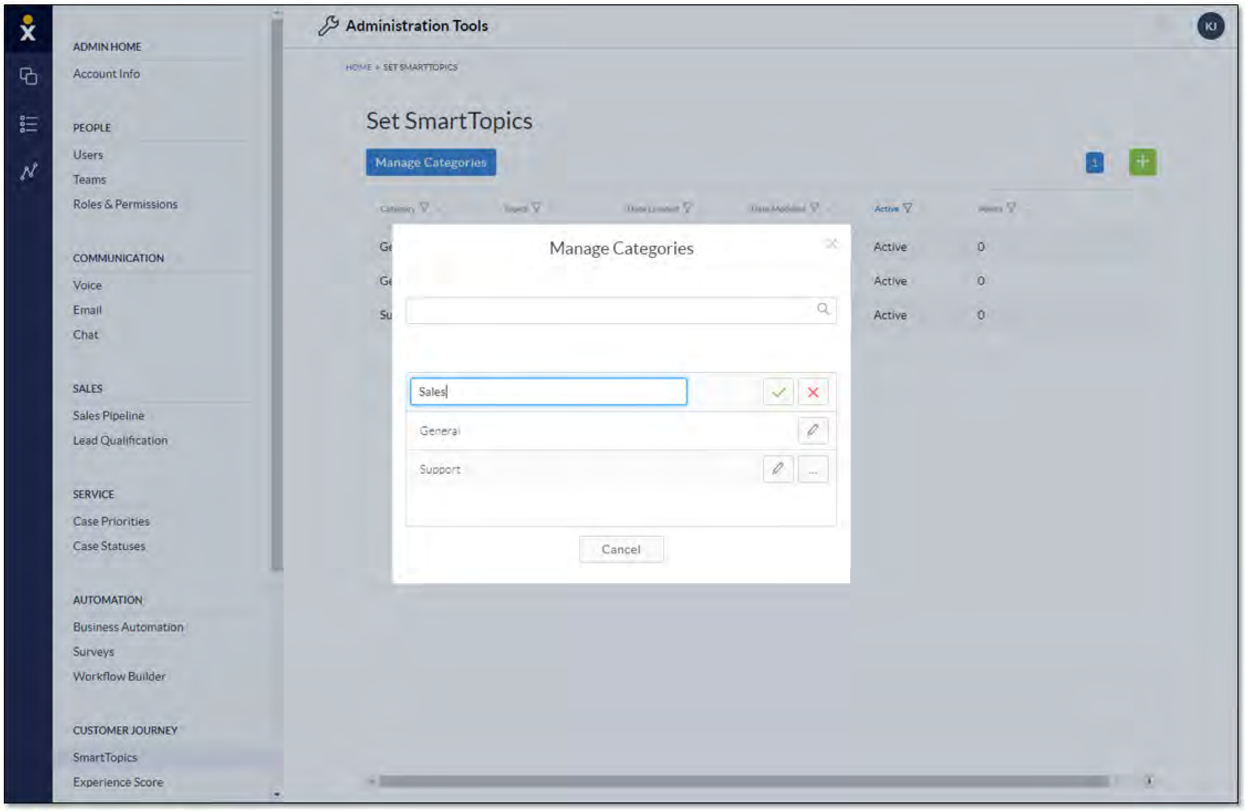
SmartTopic Categories help companies keep SmartTopics organized. For example, businesses can create a category related to Support and another for Sales. The **General** category is available by default.

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




*SmartTopics*

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

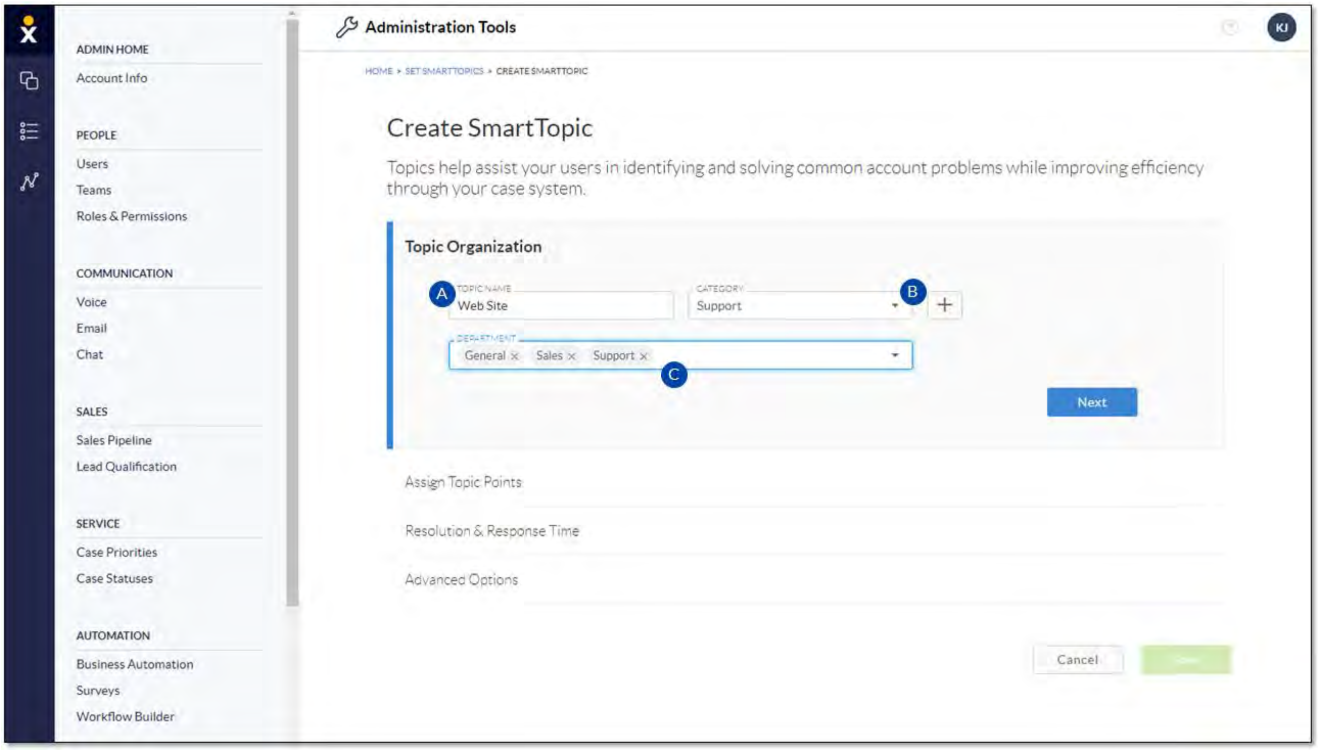



*New Category*

## Creating Topics

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

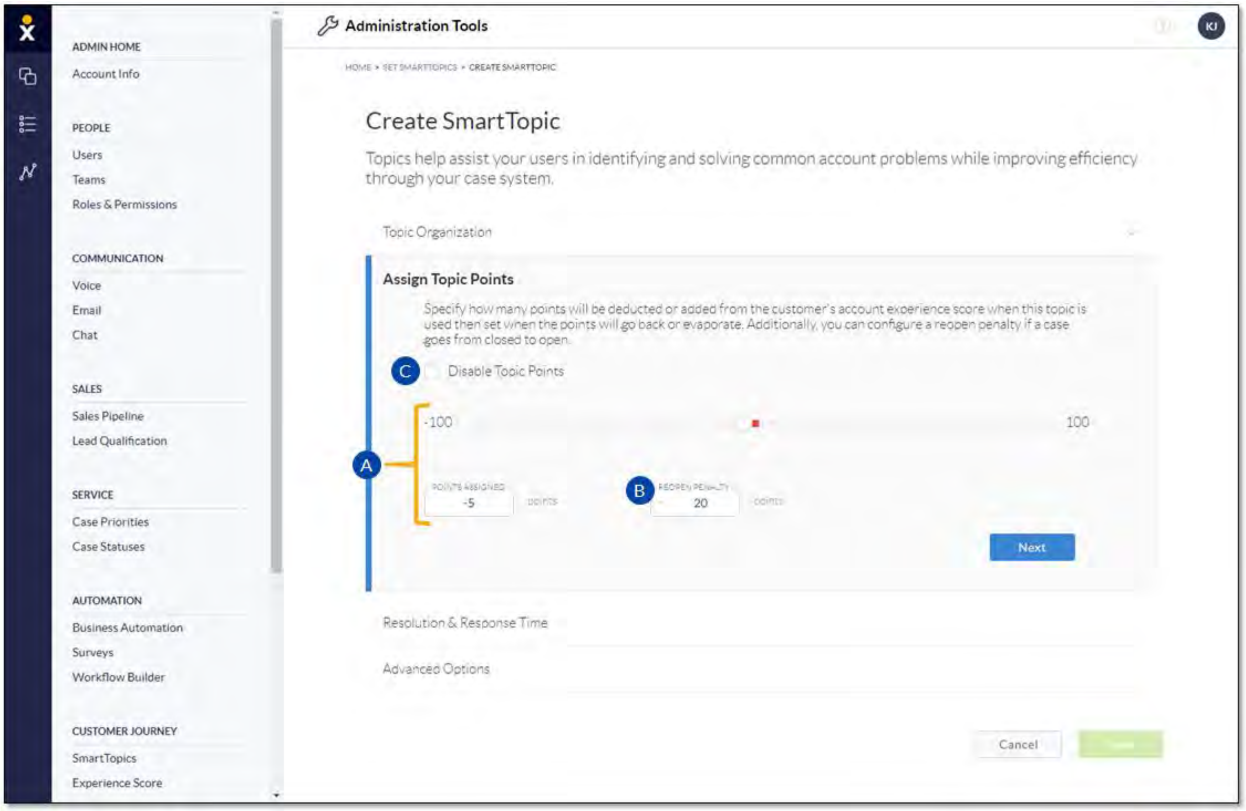
1. In the left navigation panel, under **Customer Journey**, click **SmartTopics**, then click the **green plus (+)** button.
2. Complete the **Topic Organization** fields and click **Next**.




*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**.

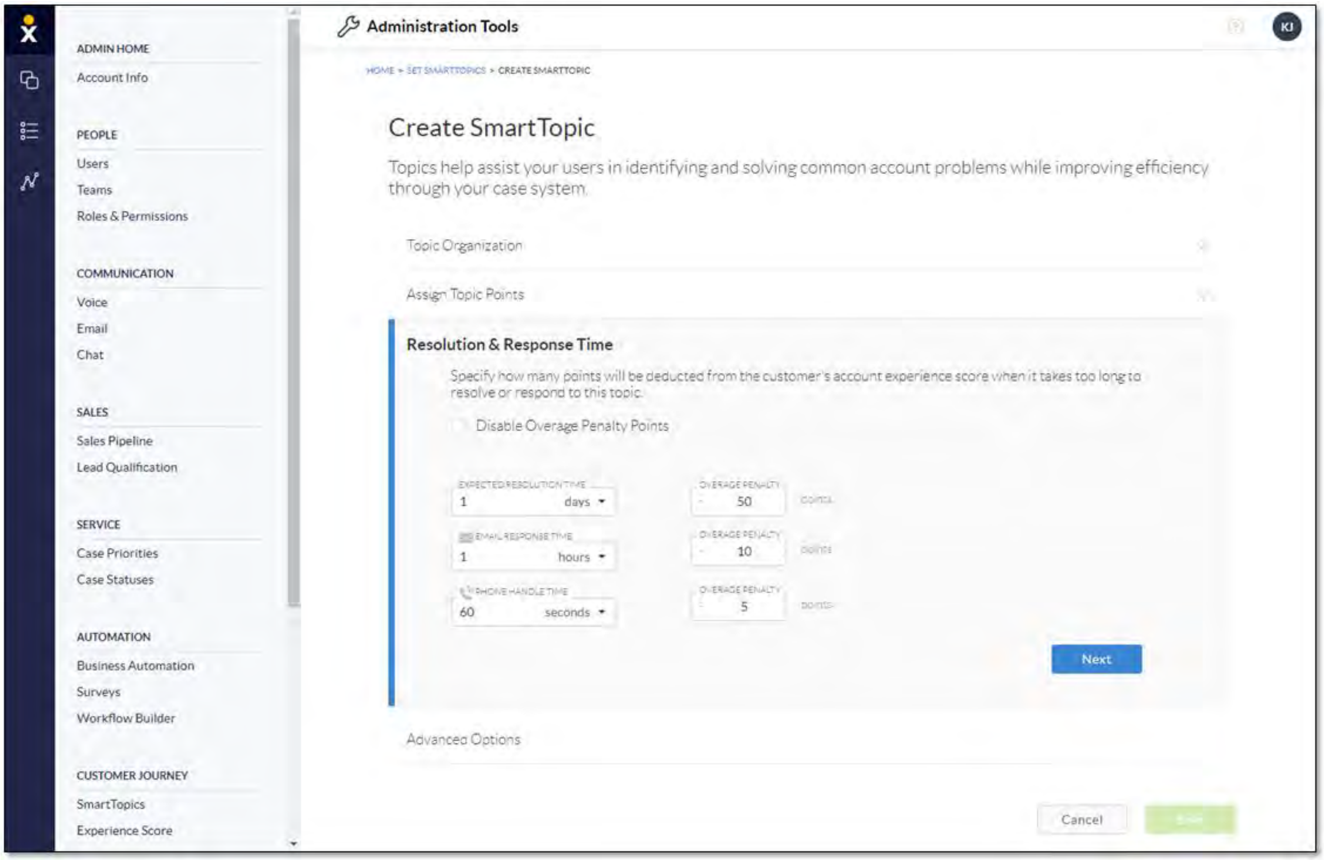
3. Complete the **Assign Topic Points** fields (see next screen shot). Click **Next**.




*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.




*Resolution & Response Time*

5. Click **Save**.

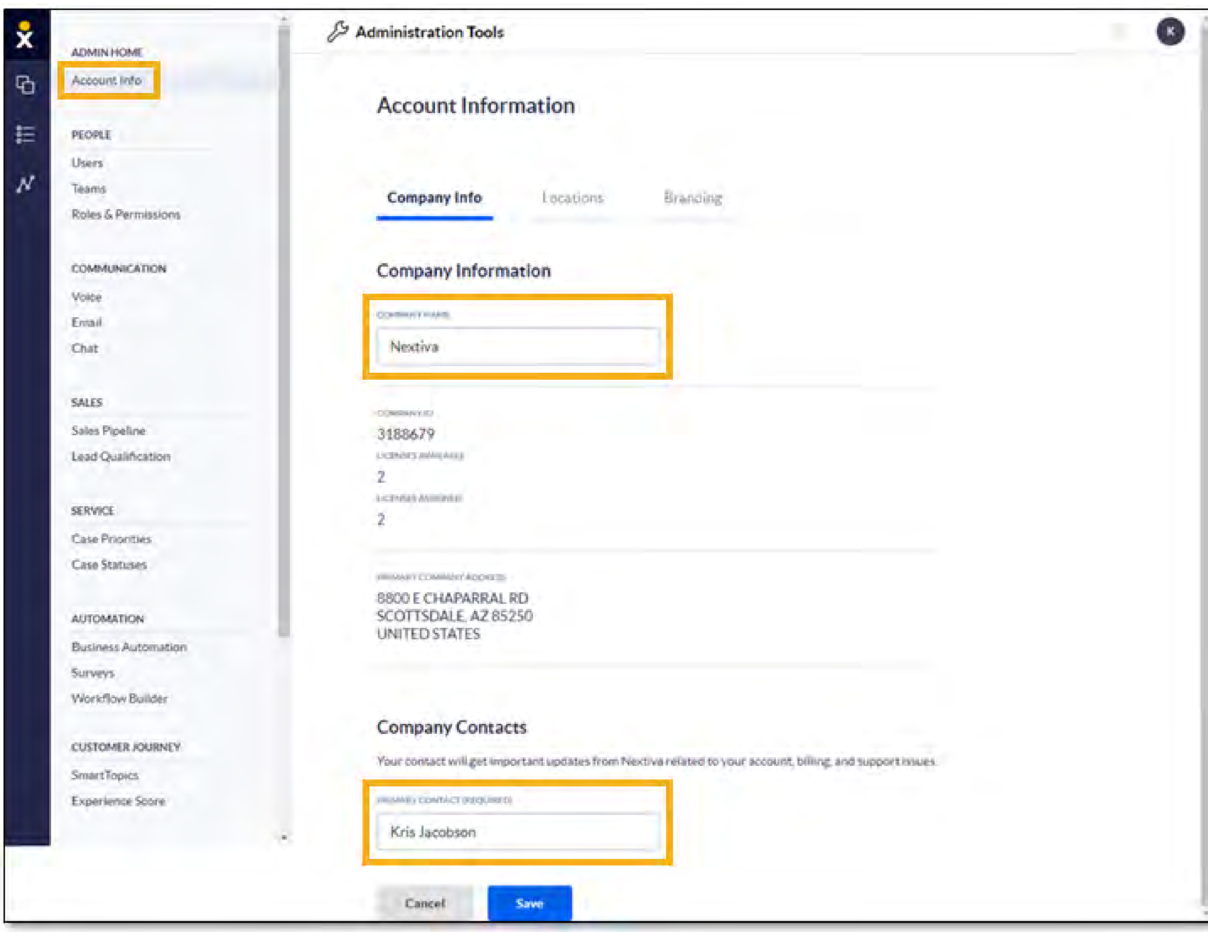
# Account Information

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**.



*Company Info Tab*