



# Online Review Management

Version 1.2

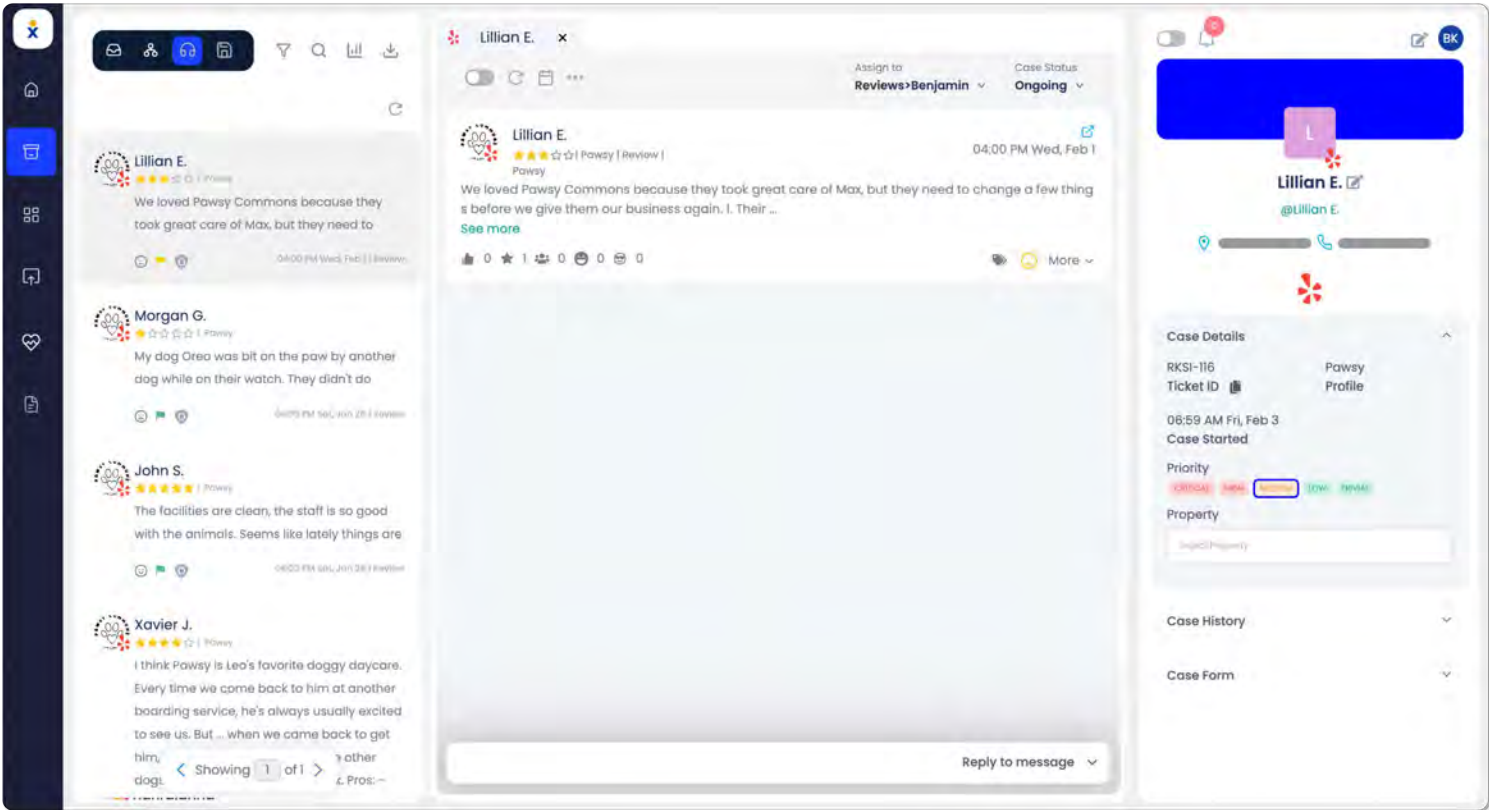
## Table of contents

Getting started .....	3
Logging in .....	4
Managing users .....	4
Setting up profiles .....	5
Integrating social media channels .....	5
Workbaskets .....	6
Creating rules .....	7
Adding schedules .....	8
Unibox .....	9

# Getting started

Nextiva online review management is the easiest way to monitor all your review sites, engage with customers in real-time, and analyze review performance.

Our AI-powered online review management platform helps you manage reviews across all review sites. Deliver timely responses as you engage with customers across Google, Yelp, TripAdvisor, and more.



# Logging in

To log into, visit [nextiva.simplify360.com](https://nextiva.simplify360.com) or [click here](#).

# Managing users

Invite teammates and staff to help manage and reply to posts on review sites – all from one place

## Adding users

From the main dashboard, click **Settings > Users > + Add user** and enter the required information, including the user's Role Type (Admin, Member, Viewer) and timezone. Click **Save**.

The screenshot shows a web interface for managing users. At the top, there are buttons for 'Alert Users', '+ Add User', and a search icon. Below the header, there is a table with columns: Name, Short Name, Email, Role, Last Logged In, and Action. The table contains 10 rows of user data. At the bottom, there is a pagination bar showing 'Showing 1 to 10 of 108 entries' and a page number '2'.

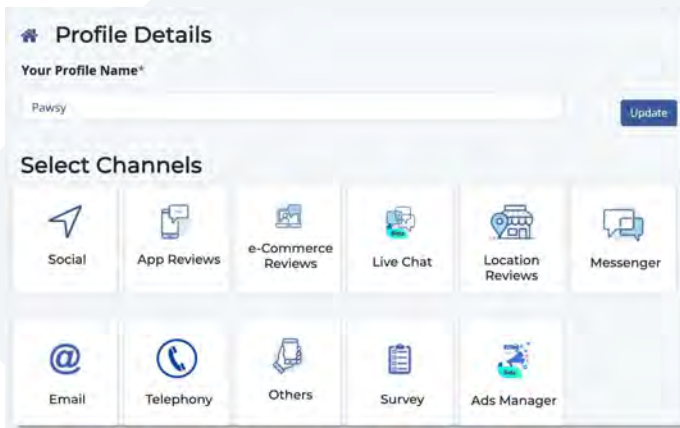
Name	Short Name	Email	Role	Last Logged In	Action
Benjamin Litke	Benjamin	benjamin.litke@pawtsy.com	Social Plus	05:35 PM Wed, Mar 29	[Action icons]
Dana Gilday	Dana	dana.gilday@pawtsy.com	OWNER	05:43 PM Wed, Mar 29	[Action icons]
Miles Christopher	Miles	miles.christopher@pawtsy.com	Social Plus	05:33 PM Wed, Mar 29	[Action icons]
Tallon Fish	Tallon	tallon.fish@pawtsy.com	ADMIN	04:51 PM Wed, Mar 29	[Action icons]
Taylor Brown	Taylor	taylor.brown@pawtsy.com	SUPER ADMIN	05:45 PM Wed, Mar 29	[Action icons]
Chinmay Bassi	Chinmay	chinmay.bassi@pawtsy.com	SUPER ADMIN	08:09 PM Tue, Mar 28	[Action icons]
Sarah Lopez	Sarah	sarah.lopez@pawtsy.com	ADMIN	07:43 PM Mon, Mar 27	[Action icons]
Garrett Dee	Garrett	garrett.dee@pawtsy.com	Social Plus	08:05 PM Wed, Mar 22	[Action icons]
Ray Nordstrom	Ray	ray.nordstrom@pawtsy.com	SUPER ADMIN	02:01 PM Wed, Mar 22	[Action icons]
Tomas Hernandez	Tomas	tomas.hernandez@pawtsy.com	ADMIN	11:00 PM Tue, Mar 21	[Action icons]

## Resetting passwords

As an administrator you can always change user's passwords, or anyone can reset their password via the Forgot Password option from the main login page. To reset a user's password, click **Change Password** under Users and enter the new password. Click **Update**.

## Deleting users

Click the check-box next to the user(s) and select **Delete Users** at the top. Click **OK** to confirm.



## Setting up profiles

From the home screen, click the **Menu** icon on the top left and select **Settings > Profile Management**.

Click **+ Create Profile** and enter a name for the new profile. Click **Create**.

### Sharing profile access

Under **Profile Management**, click the **Pencil** icon to the right of the profile and select **Share** under **Others**.

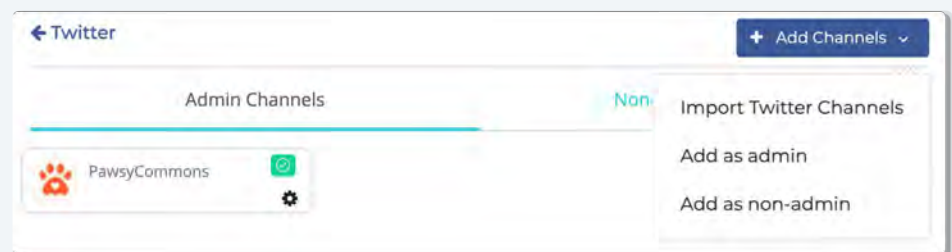
Search for the user and select the radio button under the **Access** and click **Update**.

## Integrating review channels

To integrate with review sites, click **e-Commerce Reviews** or **Location Reviews** and select the channel (Google, Yelp, Amazon, etc.).

**TIP:** Once added, you can also choose to import previous reviews to Nextiva from the selected review management system.

Click **Add Channels** and select to **Add as Admin**. Enter your account credentials and follow the prompts to complete the integration.



You can also add channels as **Non-admin** channels to keep track of other influencer's or competitors, for example.

# Workbaskets

Create Workbaskets aka teams to route customer interactions to the right group of users. For example, you can create workbaskets for specific departments so interactions are routed to the correct team based on business hours or specified keywords.

## Creating workbaskets

From the main dashboard, click **Settings > Profile Management > Edit Profile > Workbaskets > + New Workbasket**. Enter a name, description (optional), and select the users you would like to assign to the workbasket by selecting the Access button.

You can also manage the user role (Workbasket Admin/Agent) from here. Workbasket Admin is allowed to send replies directly without any approval, whereas, Workbasket Agent has to be approved by a Workbasket Admin.

**NOTE:** You can also assign users to Workbaskets under Users (**Edit User Access > Add roles to Workbasket**).

Workbasket Name\*

Workbasket Description

Select Users

Show  entries Search:

Share Profile	↕	User Details	↕	Access	↕
demo@nextiva.com		WORKBASKET ADMIN ▾		<input checked="" type="checkbox"/>	

# Creating rules

Use the Organizer to create personalized rules used for automation. Below are a few examples:

- Auto-route tickets to the most qualified team members
- Auto-response based on keywords found in the message
- Auto-response to acknowledge the post was seen
- Auto-tag messages
- Business/after-hour routing (send tickets to the California team 5AM-9PM and to the New York team 9PM-5AM)

Under **Organizer**, you can manage and create new rules. To create a new rule, click **Create** and enter a name.

Set the rule priority for sending auto-response/assignment (Optional).

Priority is measured on a scale of 0 to 300, where a higher number is associated with higher priority. If two or more rules match, the higher priority rule is triggered.

Set up the Rule Activity Time. You either choose “Always” or “Custom”.

Define the condition for which the rules will run by selecting the source and the action to perform if the rule criteria is met. For example, if anyone sends you a message via Facebook, you can have it automatically send a response back confirming their message was received. Click **Save**.

The screenshot shows the 'Organizer Name\*' field at the top. Below it are two checkboxes: 'Fast Assignment' and 'Add priority to rule'. A note explains that rules should be prioritized based on preference, with a maximum of 300 rules per priority. The 'Rule Activity Time' section has radio buttons for 'Always' (selected) and 'Custom'. The 'Rule Condition' section includes an 'IF' section with a dropdown for 'Twitter' and an 'Add' button, and a 'THEN' section with a dropdown for 'Workflow Action' and another 'Add' button. 'Cancel' and 'Save' buttons are at the bottom right.

# Adding schedules

You can set up a schedule with your business hours and holidays for specific profiles to follow custom rules, such as automatically sending a predefined response during specified holidays and outside business hours.

From the main dashboard, click **Settings** and **select** **Holiday Calendar** > **+ Add Calendar**.

Enter a name for the new calendar (required), description (optional), time zone (required), and the profile(s) to associate the calendar with.

To add a holiday, click **+ Add Holiday** at the top right corner, select the date and holiday name or reason. Click **Save** and make sure to select the **Apply only on holiday** check box.

Enter the start and end time for each day, and you can also add breaks by selecting **Plus (+)** to the right of the end time. Click **Save**.

### HOLIDAY CALENDAR

SETTINGS / HOLIDAY CALENDAR / EDIT CALENDAR + Add Holiday

Calendar Name  
AZ business hours

Description  
Business hours for Arizona locations

TimeZone  
( GMT -8:0 ) Pacific Daylight Time ( US/Pacific )

Select Profile  
Nextiva x Communication x

Apply Only on Holiday

Working Hours

Sunday  →

Monday  →

Tuesday  →

Wednesday  →

Thursday  →

Friday  →

Saturday  →

April 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6



# Unibox

Instantly view and respond to customer interactions for all integrated review sites from one inbox.

From the main dashboard, click **Unibox** to view all tickets. By default, the main tab shows all cases aka tickets you are assigned to or associated with so you can easily view and respond.

You can filter tickets based on the status (assigned/reassigned, approved, etc.) using the status drop-down at the top or by selecting the **Filter** icon. You can also filter tickets based on the profile, dates, sources (channels), and more. To save filters, click **Save filter** at the top.

Select the ticket to view the customer interaction. Select **Click here to start working on this case** on the bottom right to respond. You can also add notes to the interaction. Edit and format the text to match your brand, including the option to include attachments and emoji. Reply now or schedule it to send later.

At the top of the conversation thread, you can assign the ticket to specific workbaskets or users, including the option to update the case status. You can also schedule a follow up date from here. The other tabs at the top allow you to view and filter all tickets associated with the profiles you have access to and any saved filters.

