



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

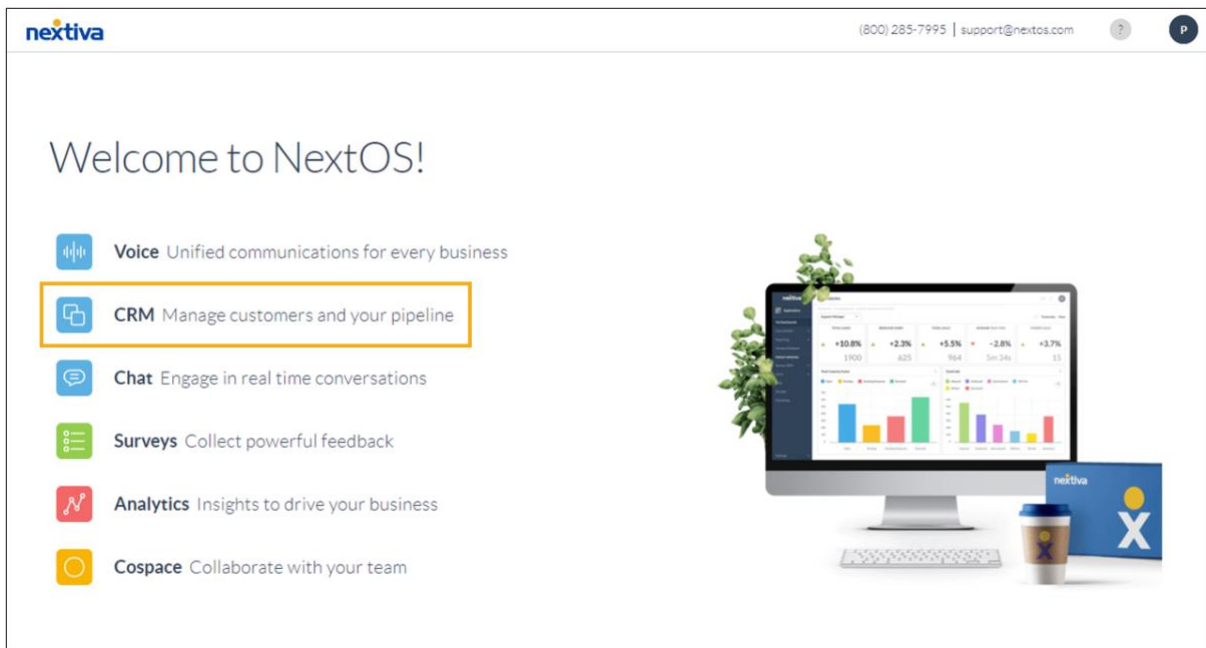
Use Administration Tools in Nextiva CRM to manage and customize NextOS for the business. Some tasks include:

- 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

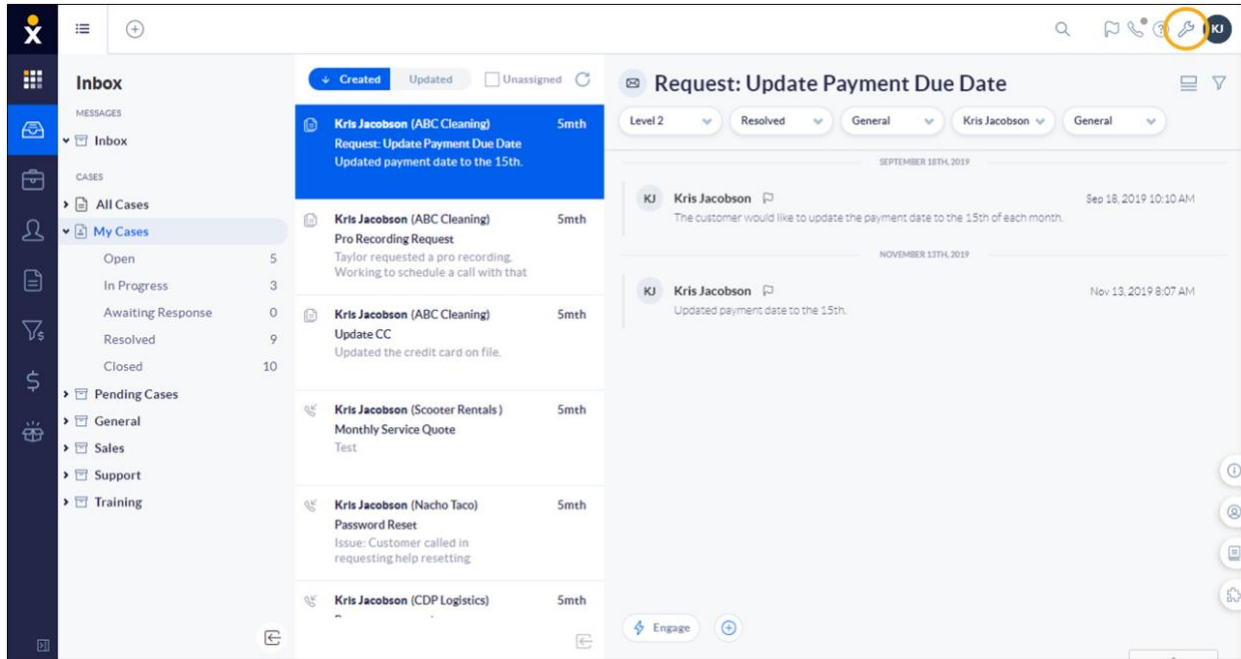
Accessing Administration Tools

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

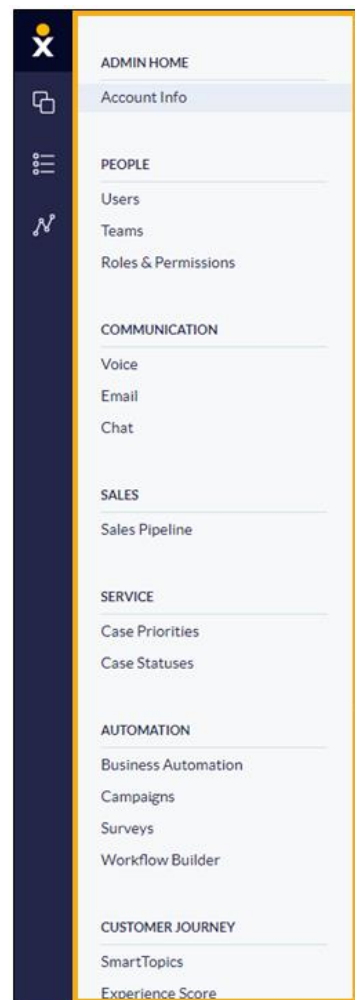
Navigating Administration Tools

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

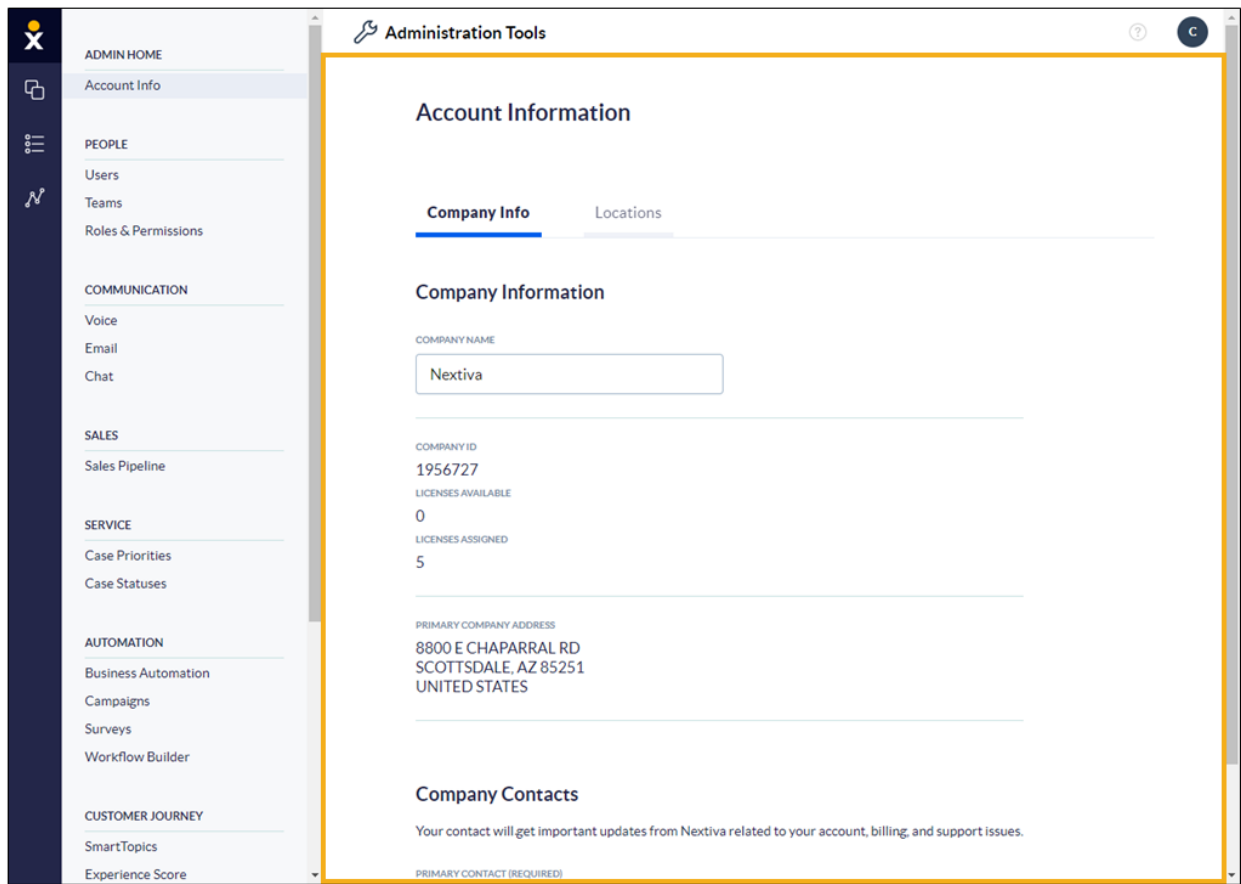
The left navigation panel displays all options for managing and customizing NextOS for your business.

- **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

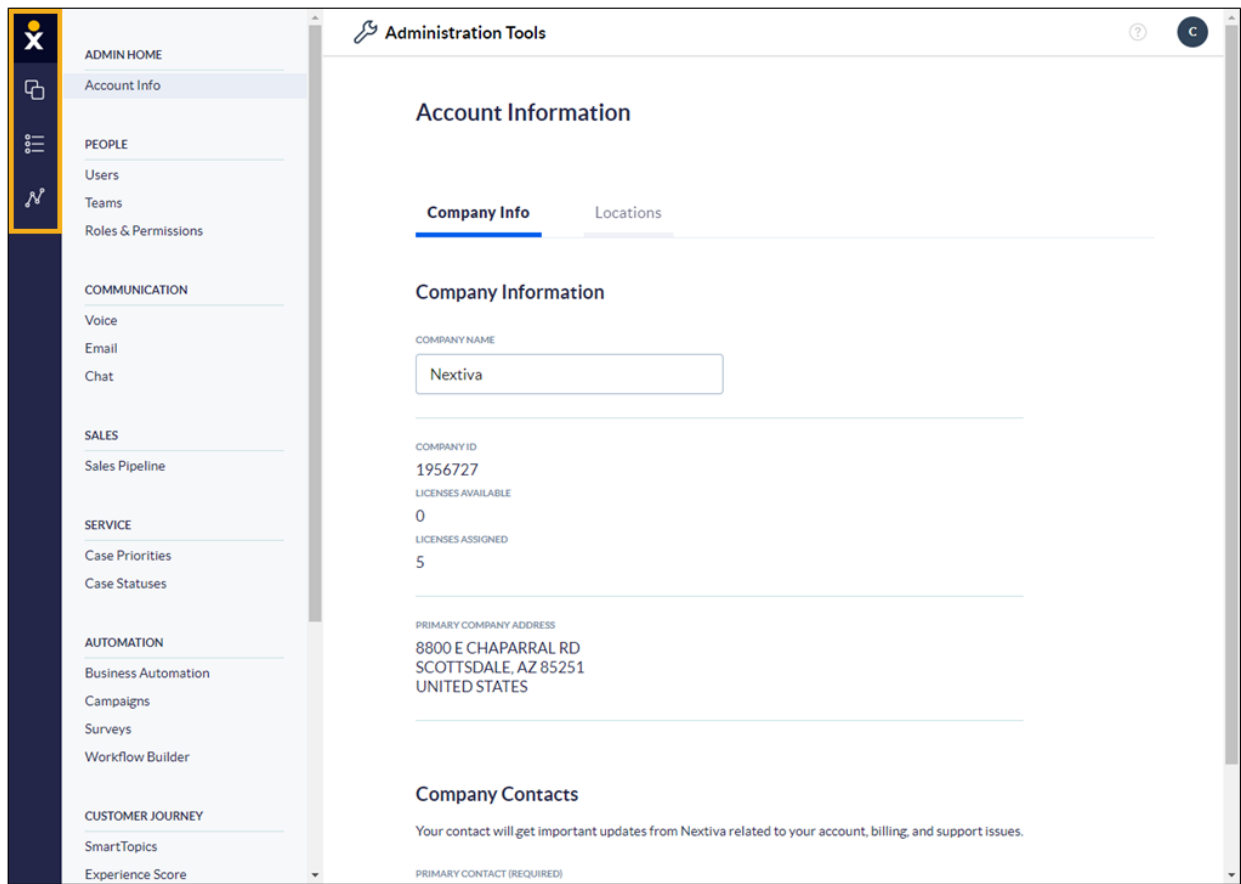
Admins stay on one easy to use dashboard without having to load additional pages or navigate away from the workspace. Selecting Account Info, for example, opens all of the Account Info options in the Main Panel. Here you can work to build and customize as much or as little as needed.



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.

The screenshot shows the 'Administration Tools' interface. On the left, a navigation sidebar lists various categories: ADMIN HOME, ACCOUNT INFO, PEOPLE (with sub-items Users and Teams), ROLES & PERMISSIONS, COMMUNICATION (with sub-items Voice, Email, Chat), SALES (with sub-item Sales Pipeline), and SERVICE (with sub-items Case Priorities and Case Statuses). The 'Teams' item is highlighted. The main content area is titled 'Teams' and features a 'Current Teams' section. This section includes a search bar labeled 'Search teams' and a blue 'Create team' button. Below this is a table with three columns: 'Team', 'Users', and 'Created on'. The table lists three teams: 'Billing' (3 users, created Dec 26, 2019), 'Customer Service' (0 users, created Dec 26, 2019), and 'General' (42 users, created Dec 09, 2019). A horizontal scrollbar is visible at the bottom of the table.

Team	Users	Created on
Billing	3 users	December 26, 2019
Customer Service	0 users	December 26, 2019
General	42 users	December 09, 2019

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 form is positioned over a sidebar menu and a 'Current Teams' table. The sidebar menu includes sections for ADMIN HOME, PEOPLE, COMMUNICATION, SALES, SERVICE, and AUTOMATION. The 'Current Teams' table lists teams such as Billing, Customer Service, and General. The 'Create new team' form has a 'TEAM NAME' field containing 'Sales'. Below this, it shows 'USERS CURRENTLY ASSIGNED TO THIS TEAM' with 'Alva Bertolin' and 'Amos Jens'. A 'Search and assign users to this team' section includes a search bar and a list of users: 'Alva Bertolin' (checked), 'Amos Jens' (checked), and 'Andrew Niccol' (unchecked). The 'Create' button is highlighted in blue.

Create New Team Form

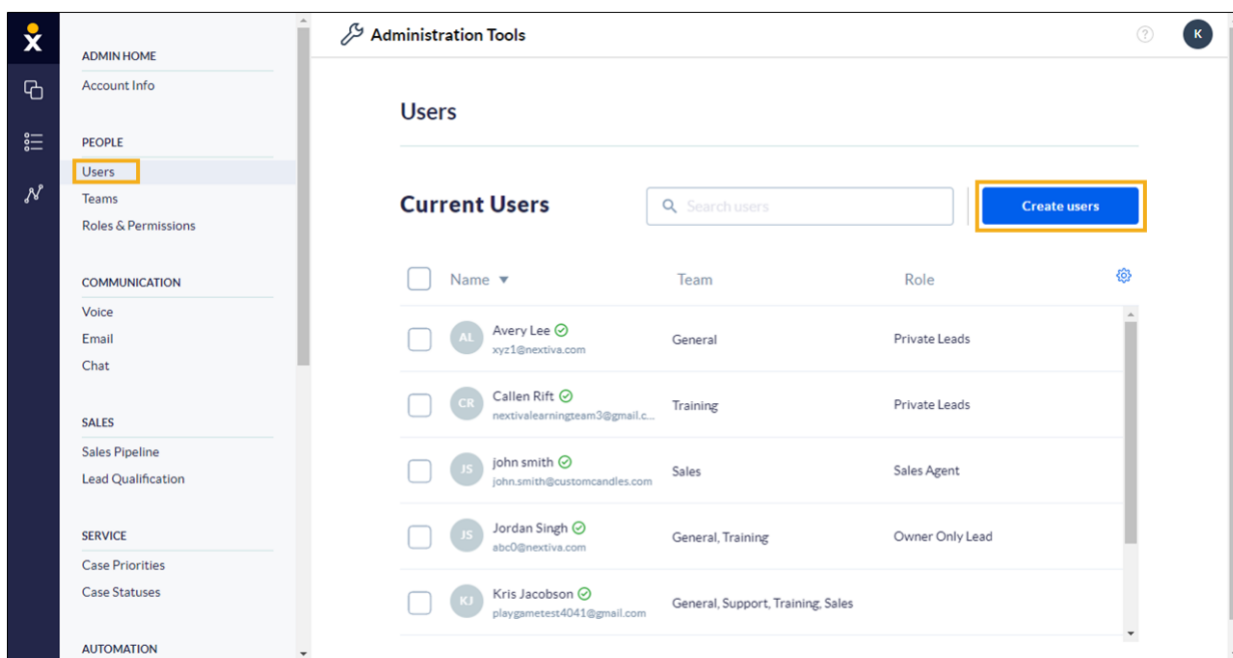
Users

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'. The modal contains the following fields and options:

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

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 selected. A table of 'Current Users' is displayed. The user 'Avery Lee' is highlighted, and the 'Actions' menu is open, showing the 'Edit Profile' option selected.

Name	Team	Role
Avery Lee (xyz1@nextiva.com)	General	Private Leads
Callen Rift (nextivalearningteam3@gmail.com)	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 Tuptlet		

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 selected. The user 'Avery Lee' is highlighted, and the 'Licenses' section is open, showing the 'Add License' option selected.

Missing license. Users need a license to get started. Click add license below

Add License

Search Licenses

Nextiva Customer Relationship Suite Enterprise: Additional U...

Nextiva Customer Relationship Suite Enterprise: Base User

Cancel 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

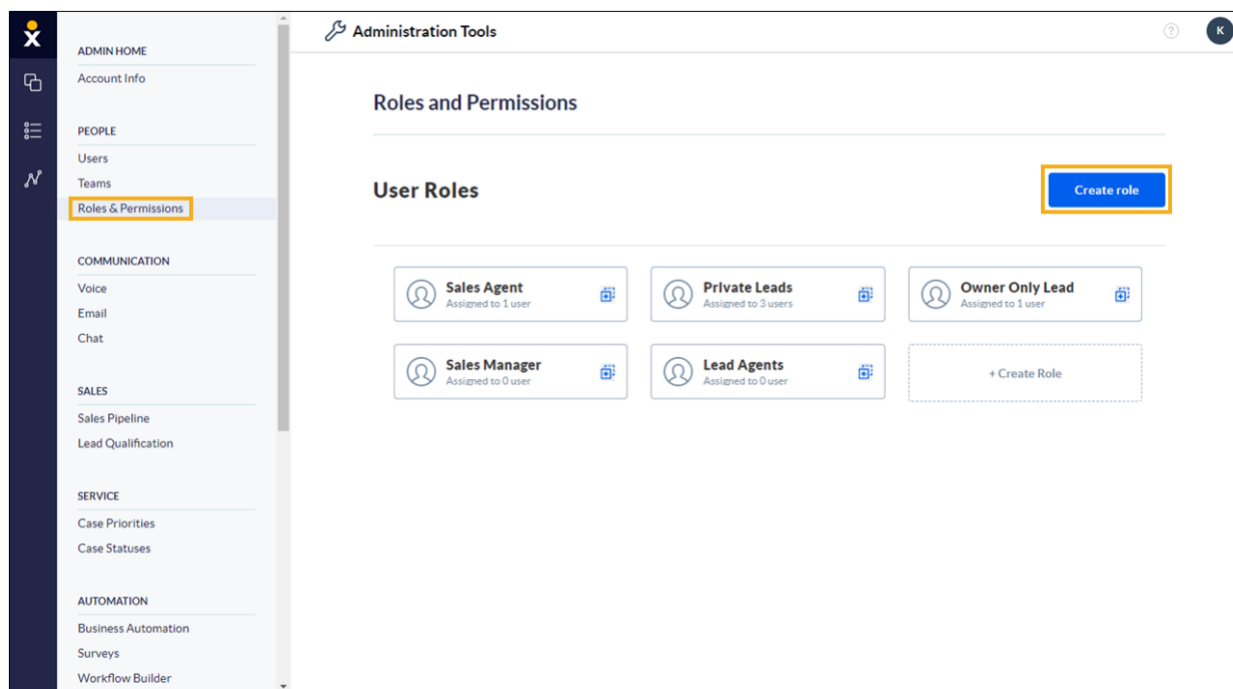
Many businesses choose to configure User access based on job responsibilities. For example, you might not want support agents to have access to sales information, or sales agents to have administrative permissions, as well.

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.

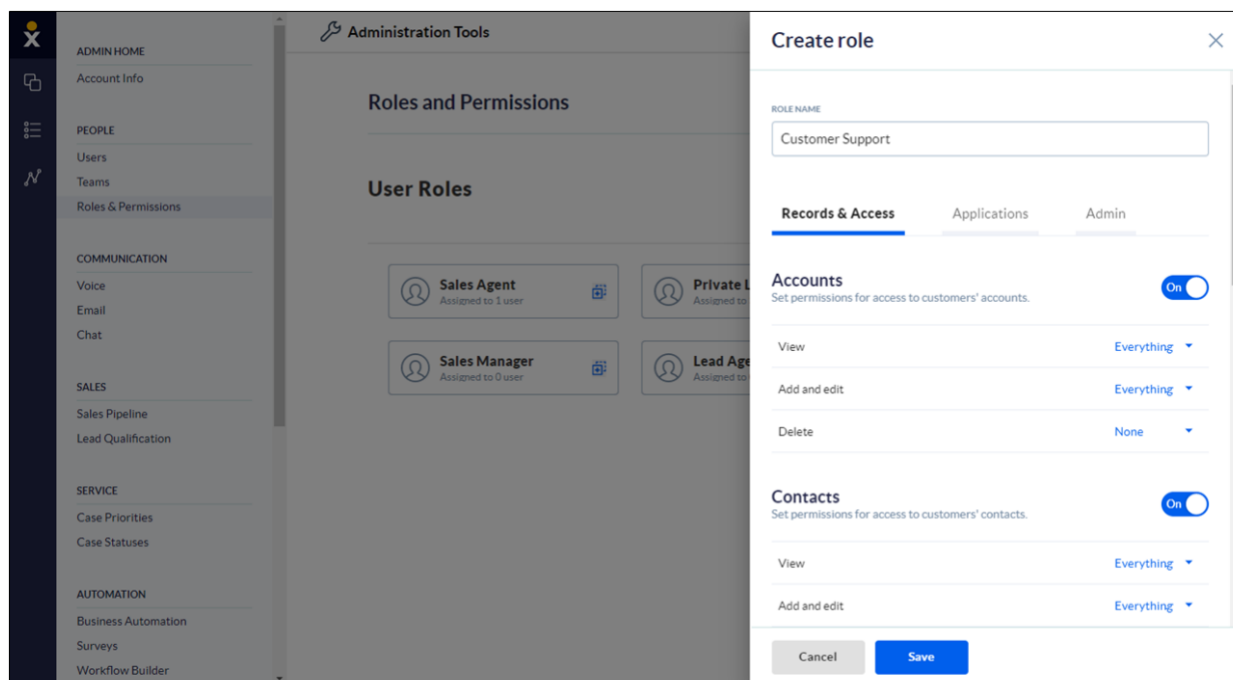
1. Under **People** in the left navigation panel, click **Roles & Permissions**.
2. From the **Roles and Permissions** page, click **Create role**.



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**.

The screenshot shows the 'Administration Tools' interface with a sidebar on the left containing categories 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 first user, Avery Lee, with 'Edit Profile' highlighted.

Name	Team	Role
Avery Lee (xyz1@nextiva.com)	General	Private Leads
Callen Rift (nextivalearningteam3@gmail.com)	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

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), and Role. 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

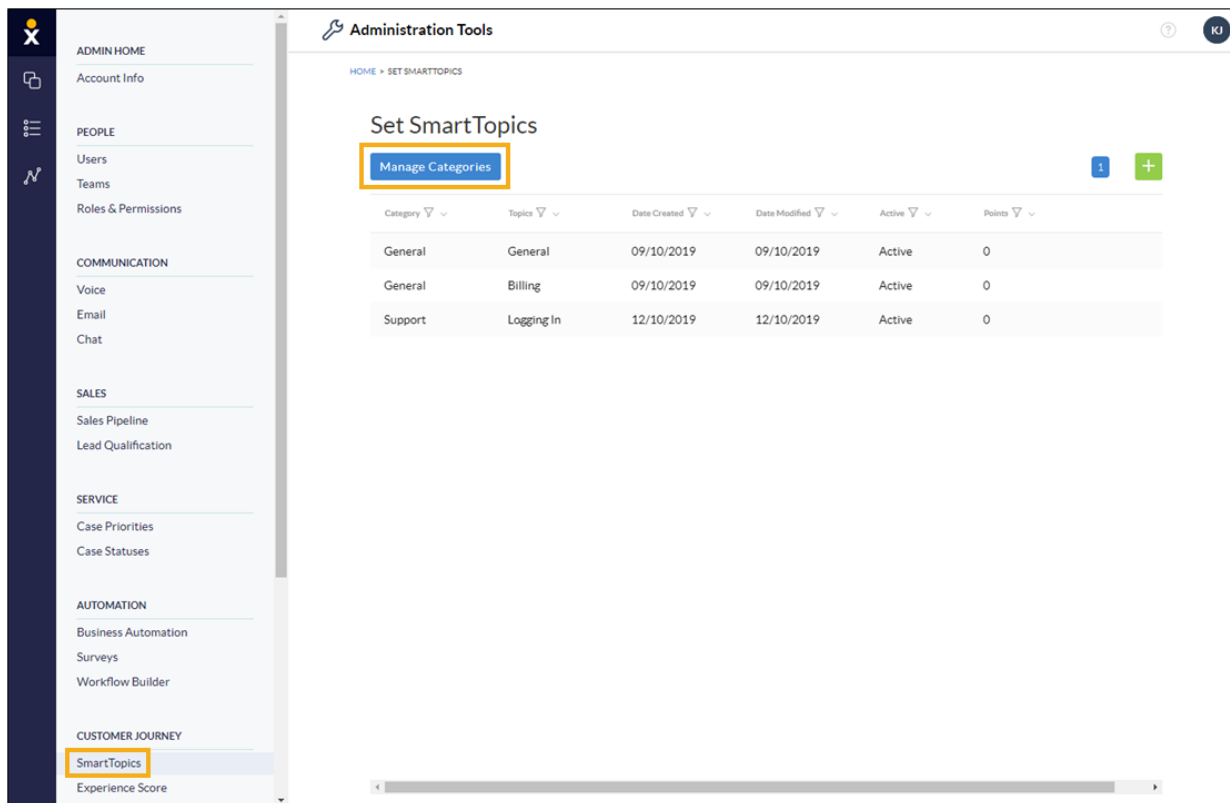
SmartTopics are the easiest way any business can categorize interactions to better understand the customer experience. SmartTopics are completely customizable based on how you do business. Assign a unique topic (tied to a score) to each interaction with customers.

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.

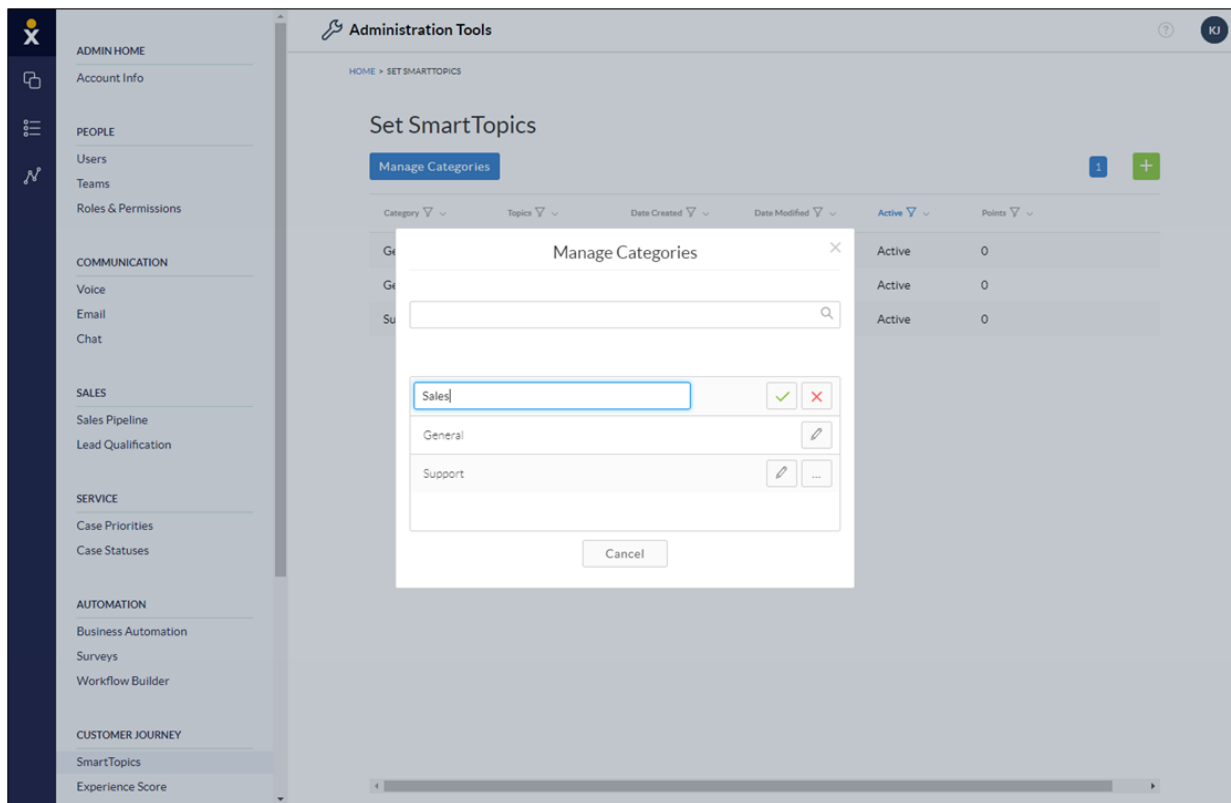


The screenshot displays the 'Administration Tools' interface. On the left is a navigation sidebar with categories like ADMIN HOME, PEOPLE, COMMUNICATION, SALES, SERVICE, AUTOMATION, and CUSTOMER JOURNEY. The 'SmartTopics' option under CUSTOMER JOURNEY is highlighted. The main content area is titled 'Set SmartTopics' and features a 'Manage Categories' button (highlighted with a red box) and a '+New Category' button. Below these is a table with the following data:

Category	Topics	Date Created	Date Modified	Active	Points
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' form in the Administration Tools interface. The form is titled 'Create SmartTopic' and includes a 'Topic Organization' section. The 'Topic Organization' section contains three main fields: 'TOPIC NAME' (containing 'Web Site'), 'CATEGORY' (a dropdown menu set to 'Support'), and 'DEPARTMENT' (a multi-select dropdown menu containing 'General', 'Sales', and 'Support'). A 'Next' button is located at the bottom right of the form. Below the 'Topic Organization' section, there are three sections: 'Assign Topic Points', 'Resolution & Response Time', and 'Advanced Options'. At the bottom right of the form, there are 'Cancel' and 'Save' 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**.

The screenshot shows the 'Create Smart Topic' configuration page. The 'Assign Topic Points' section includes a 'Disable Topic Points' checkbox (labeled C), a slider for 'Points Assigned' (labeled A) ranging from -100 to 100, and a 'Reopen Penalty' input field (labeled B) set to 20. The 'Points Assigned' field is currently set to -5. A 'Next' button is located at the bottom right of the form.

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 'Administration Tools' interface for creating a Smart Topic. The left sidebar contains navigation menus for ADMIN HOME, PEOPLE, COMMUNICATION, SALES, SERVICE, AUTOMATION, and CUSTOMER JOURNEY. The main content area is titled 'Create Smart Topic' and includes a breadcrumb trail: HOME > SET SMARTTOPICS > CREATESMARTTOPIC. Below the title, there are dropdown menus for 'Topic Organization' and 'Assign Topic Points'. The 'Resolution & Response Time' section is highlighted with a blue border and contains the following text: 'Specify how many points will be deducted from the customer's account experience score when it takes too long to resolve or respond to this topic.' Below this text is a checkbox labeled 'Disable Overage Penalty Points' which is currently unchecked. There are three rows of input fields for time limits and their corresponding overage penalties:

Time Limit	Unit	Overage Penalty (points)
1	days	50
1	hours	10
60	seconds	5

At the bottom of the 'Resolution & Response Time' section is a blue 'Next' button. Below this section is an 'Advanced Options' section which is currently collapsed. At the bottom right of the page 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, a navigation menu is visible with 'Account Info' highlighted under 'ADMIN HOME'. The main content area is titled 'Account Information' and has three tabs: 'Company Info', 'Locations', and 'Branding'. The 'Company Info' tab is selected. Below the tabs, the 'Company Information' section contains several fields: 'COMPANY NAME' (Nextiva), 'COMPANY ID' (3188679), 'LICENSES AVAILABLE' (2), 'LICENSES ASSIGNED' (2), and 'PRIMARY COMPANY ADDRESS' (8800 E CHAPARRAL RD, SCOTTSDALE, AZ 85250, UNITED STATES). Below this, the 'Company Contacts' section includes a note: 'Your contact will get important updates from Nextiva related to your account, billing, and support issues.' and a 'PRIMARY CONTACT (REQUIRED)' field containing 'Kris Jacobson'. At the bottom, there are 'Cancel' and 'Save' buttons.

Company Info Tab