Nextiva CRM

VERSION 4.4

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Nextiva CRM

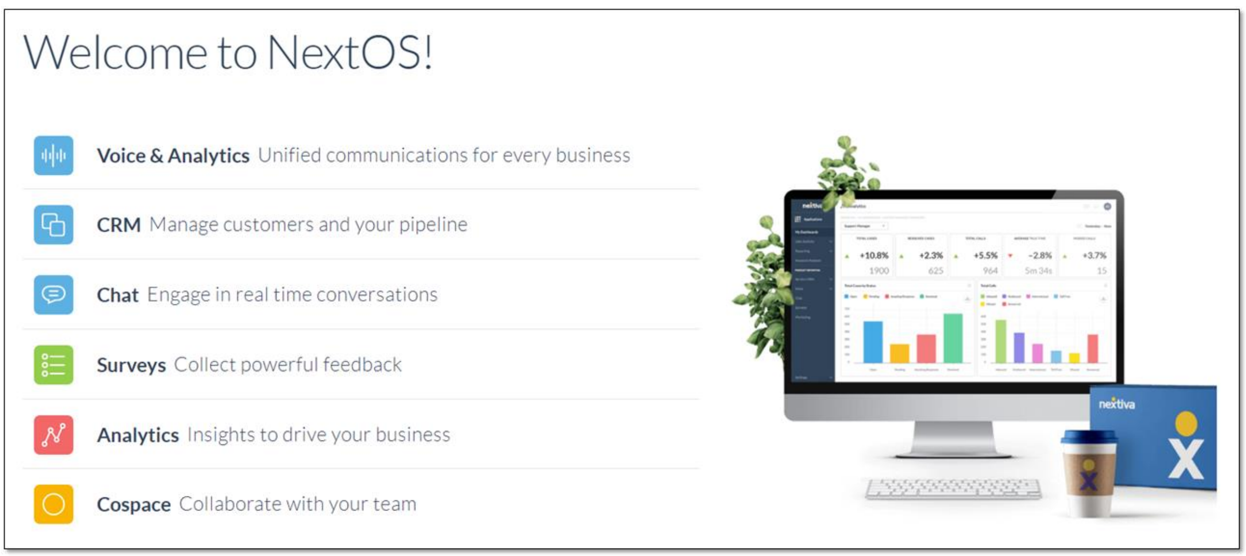
Nextiva's Customer Relationship Management tool (CRM) is used to enhance customer relationships by tracking the customer journey from recruitment to cancelation. Nextiva CRM improves business productivity, profitability, and communication processes all within one system.

Use Nextiva CRM to:

- Identify sales leads.
- Convert leads to opportunities for tracking.
- Address customer issues.
- View Analytics, which provides customer insight.
- Manage all communication and customer data in one place.

Logging In

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

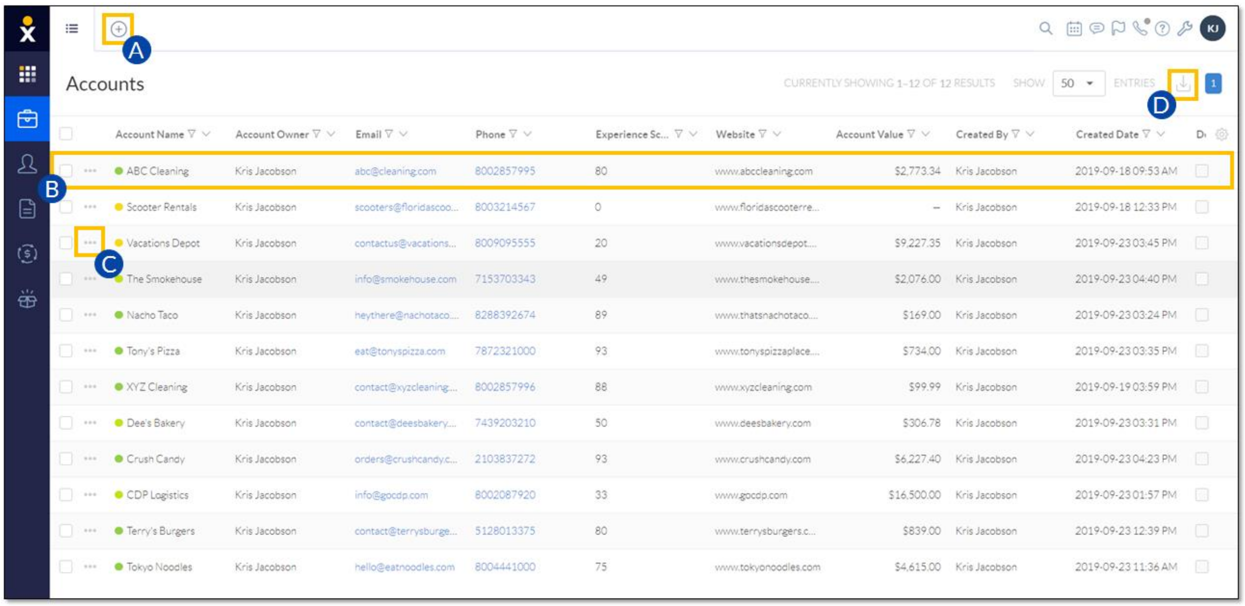


NextOS Home Page

Accounts

An **Account** is a CRM record used to store customer information, along with a history of all interactions related to that Account. Users can associate an Account with other CRM records, such as Cases, Contacts, and Opportunities.

Click **Account** from the left-panel to view all Account records in Nextiva CRM.



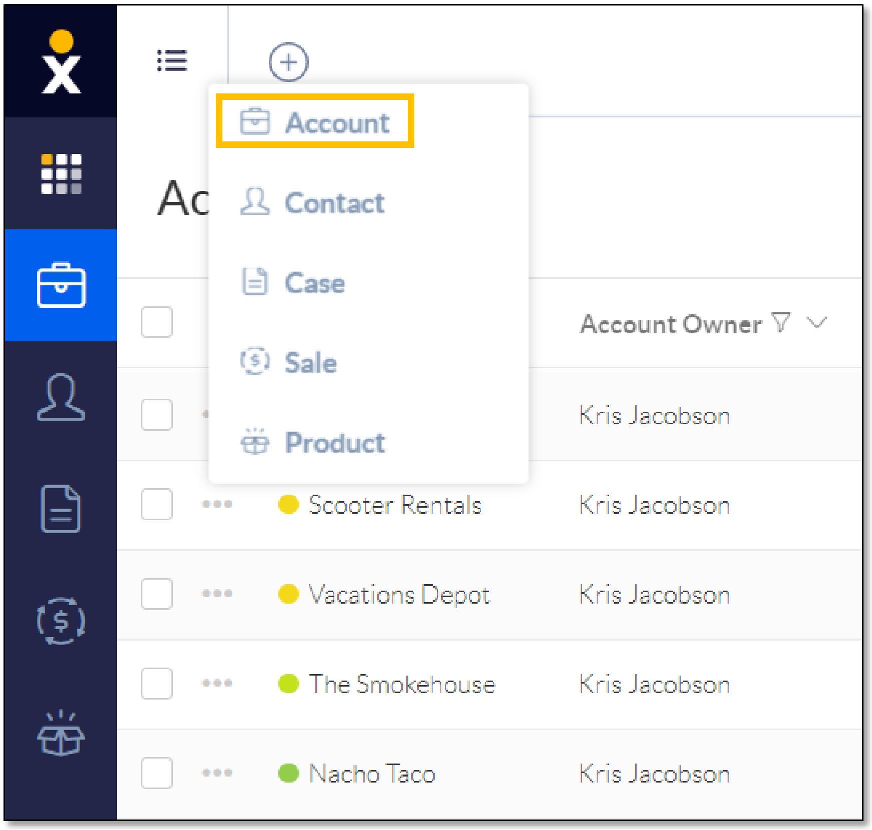
Account View

Users can perform the following actions in the Account view:

A. Click the **Plus (+)** icon to add a new record (Account, Contact, Case, Lead, Opportunity, Product, or a custom record type).
B. Click the row corresponding to an Account to view the Account Workspace.
C. Click the **Ellipsis (...)** icon corresponding to an Account to open a list of contextual actions. Users can use this menu as a shortcut to create system records related to the Account.
D. Select the checkbox(es) corresponding to the desired Account(s), and click the **Export** icon to export the Account data to a **.csv** file.

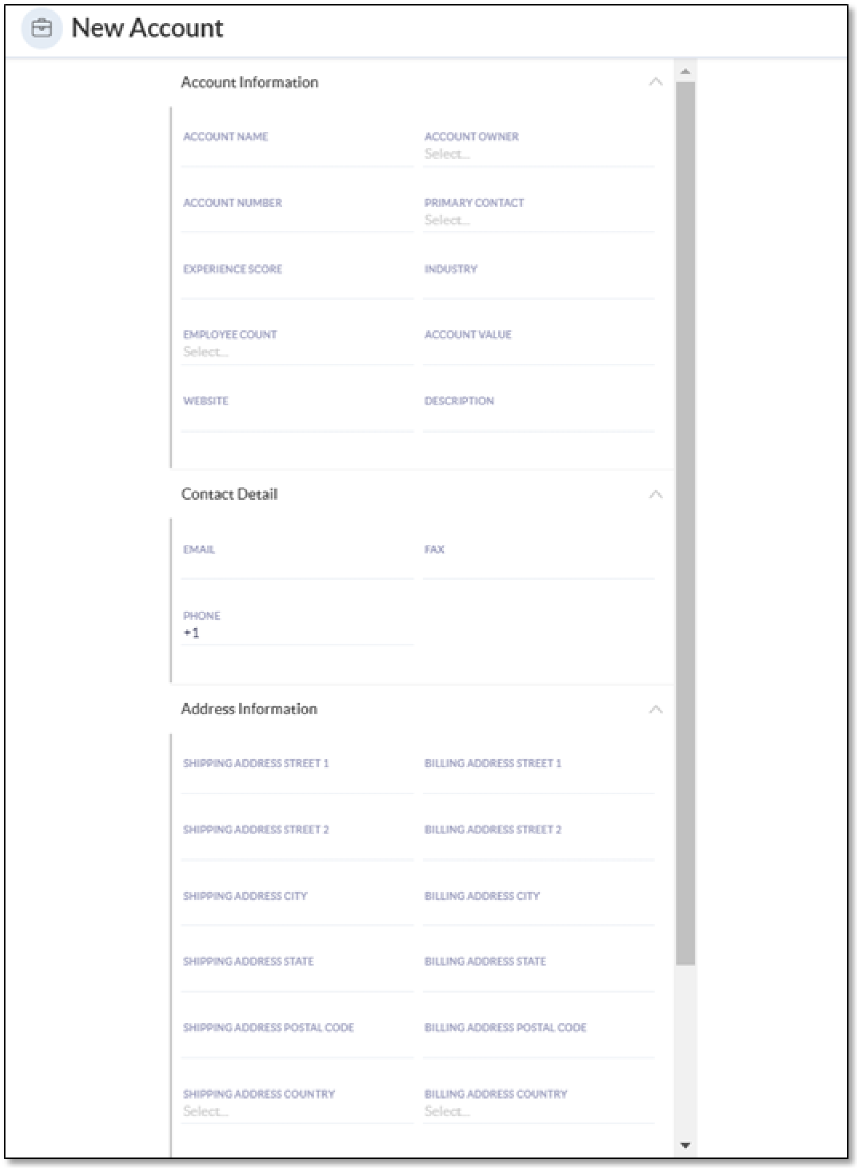
Creating Accounts

1. Click the Plus (+) icon and select Account.



Account Option

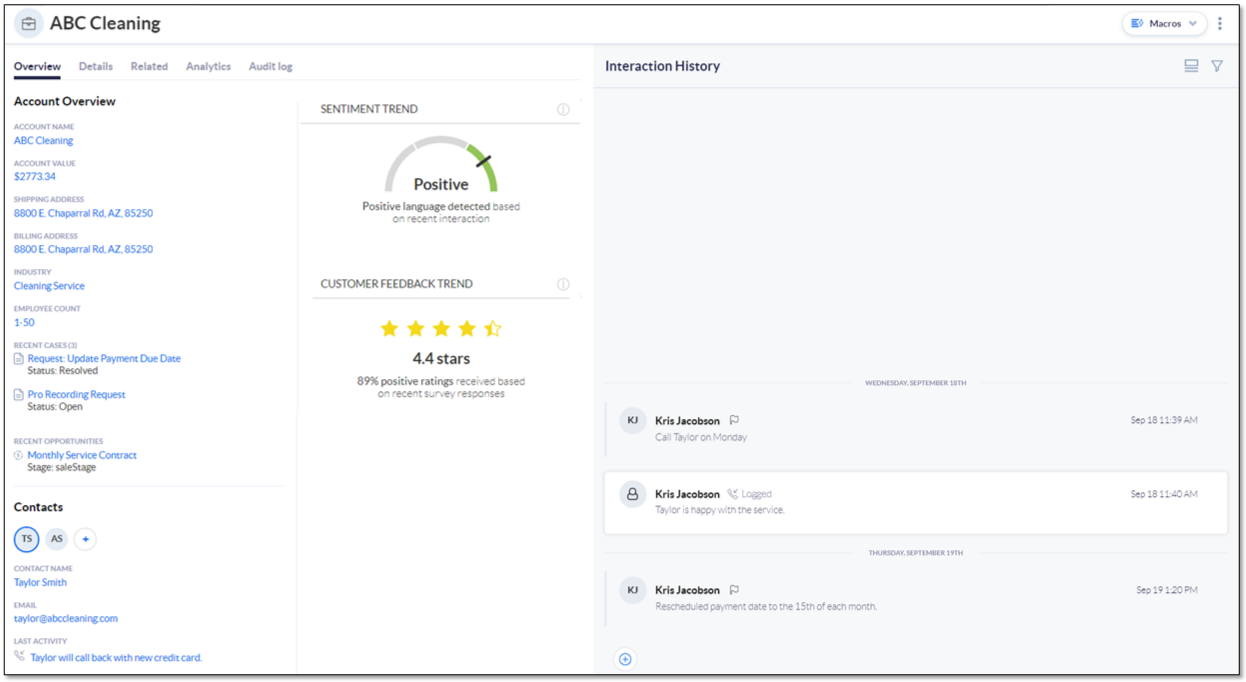
2. Fill out the New Account form and click Save.



New Account Form

Account Workspace

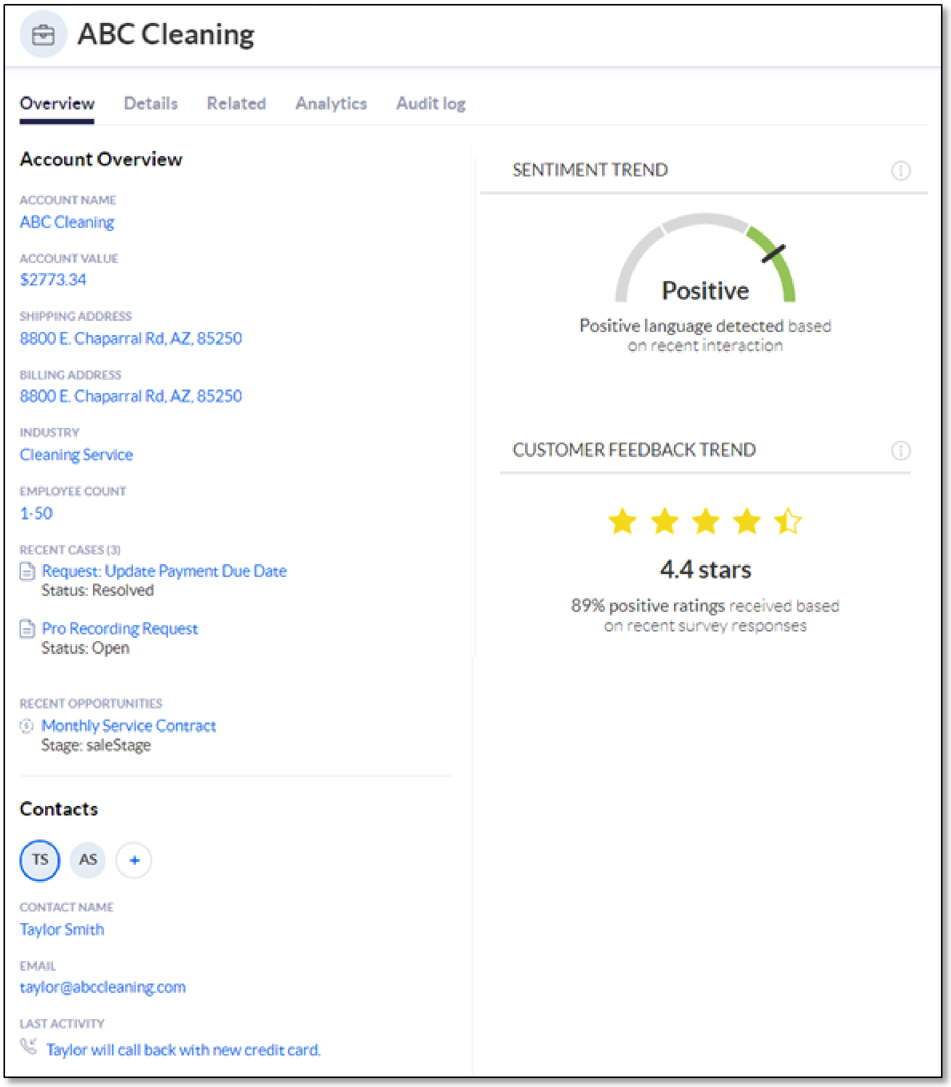
In the **Account** view, search and select an Account to view the **Account Workspace**. The Workspace allows Users to easily view and manage Account information, Contact details, Interactions, Analytics, and more.



Account Workspace

Overview Tab

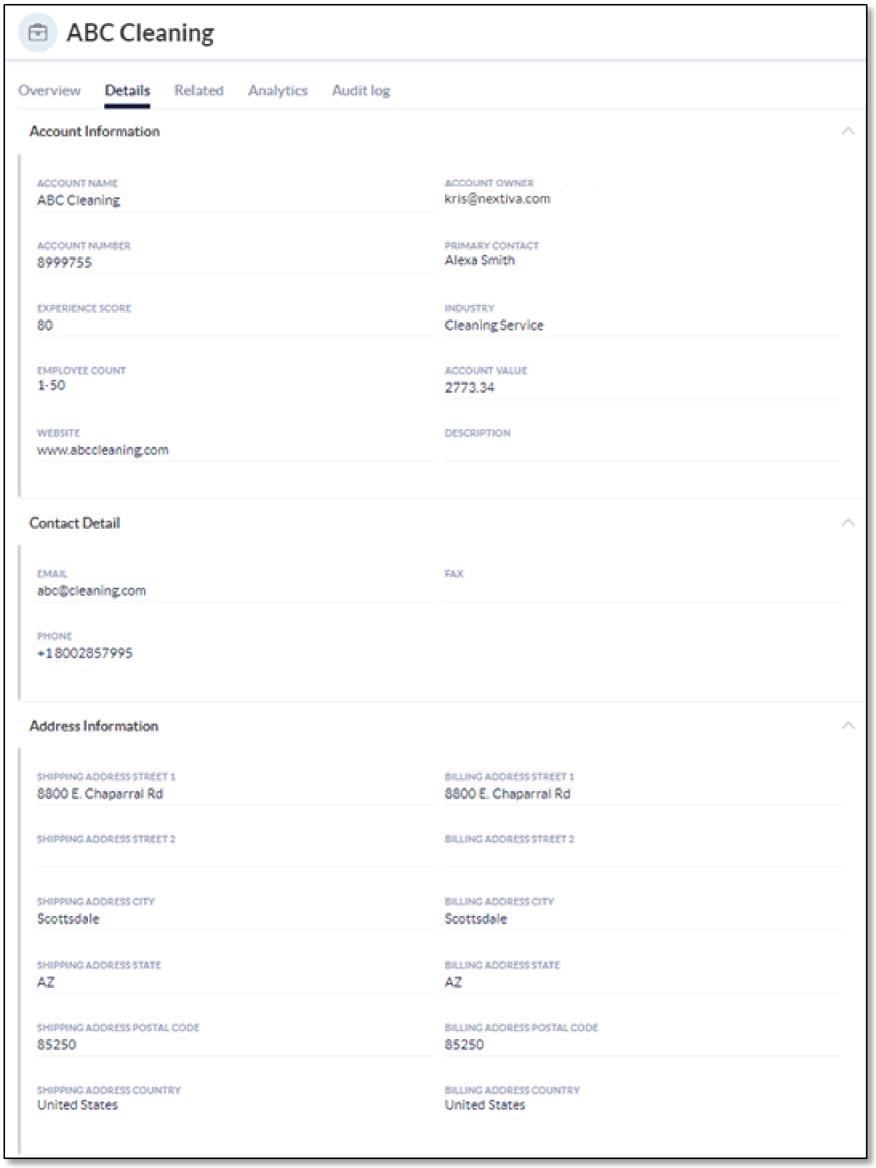
The **Overview** tab displays necessary Account information, such as account name, shipping and billing addresses, associated Contacts, and Analytics. Recent Cases and Opportunities associated with the Account also appear on the Overview tab.



Overview Tab

Details Tab

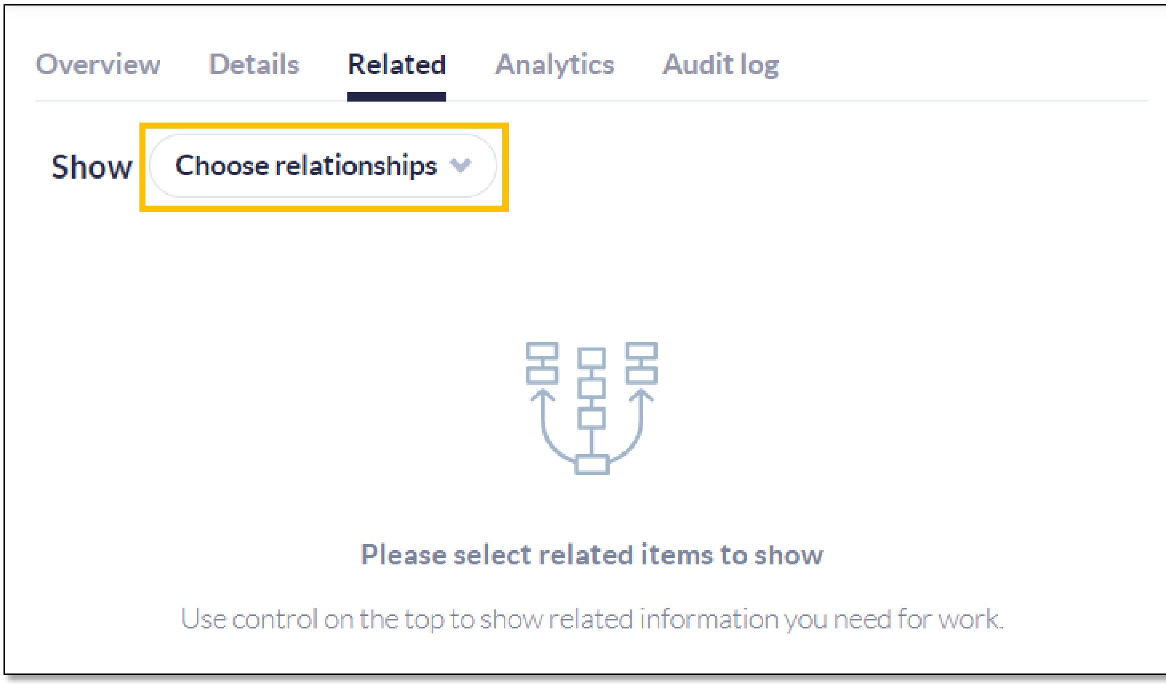
The **Details** tab allows Users to view and edit Account information, Contact details, and address information.



Details Tab

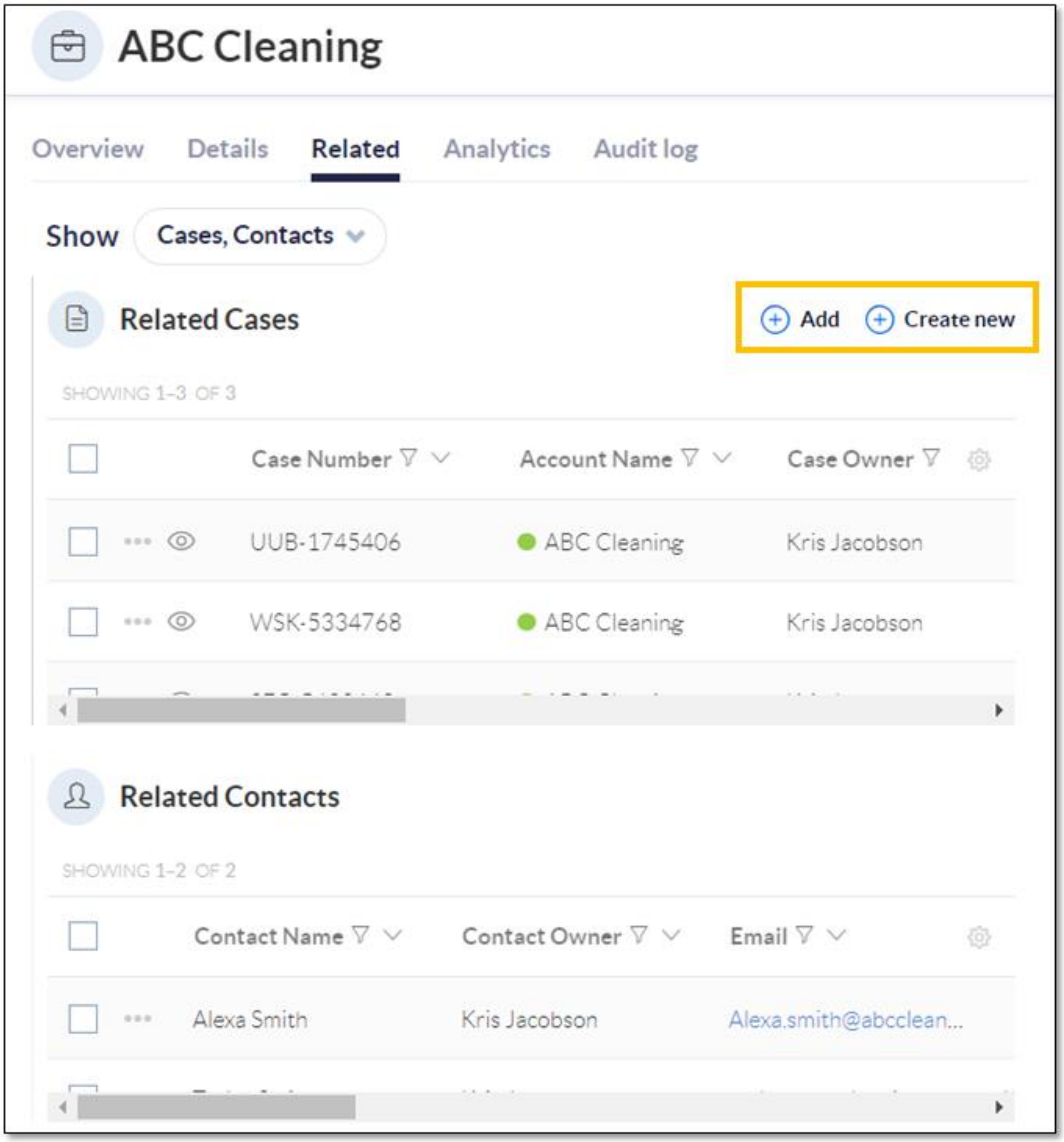
Related Tab

The **Related** tab displays all relationships associated with the Account. Click **Choose relationships** and select the desired record type(s) (**Cases**, **Contacts**, **Child**/**Parent Accounts**, **Opportunities**) from the drop-down menu.



Related Tab

To associate an existing record, such as a Case, with an Account, hover over the top-right corner above the table and click **Add**. Click **Create new** to automatically associate and create a new record type. For example, ABC Cleaning calls in wanting to update Account information. The Agent handling the call can add a new Case here and have it automatically related to the account ABC Cleaning.

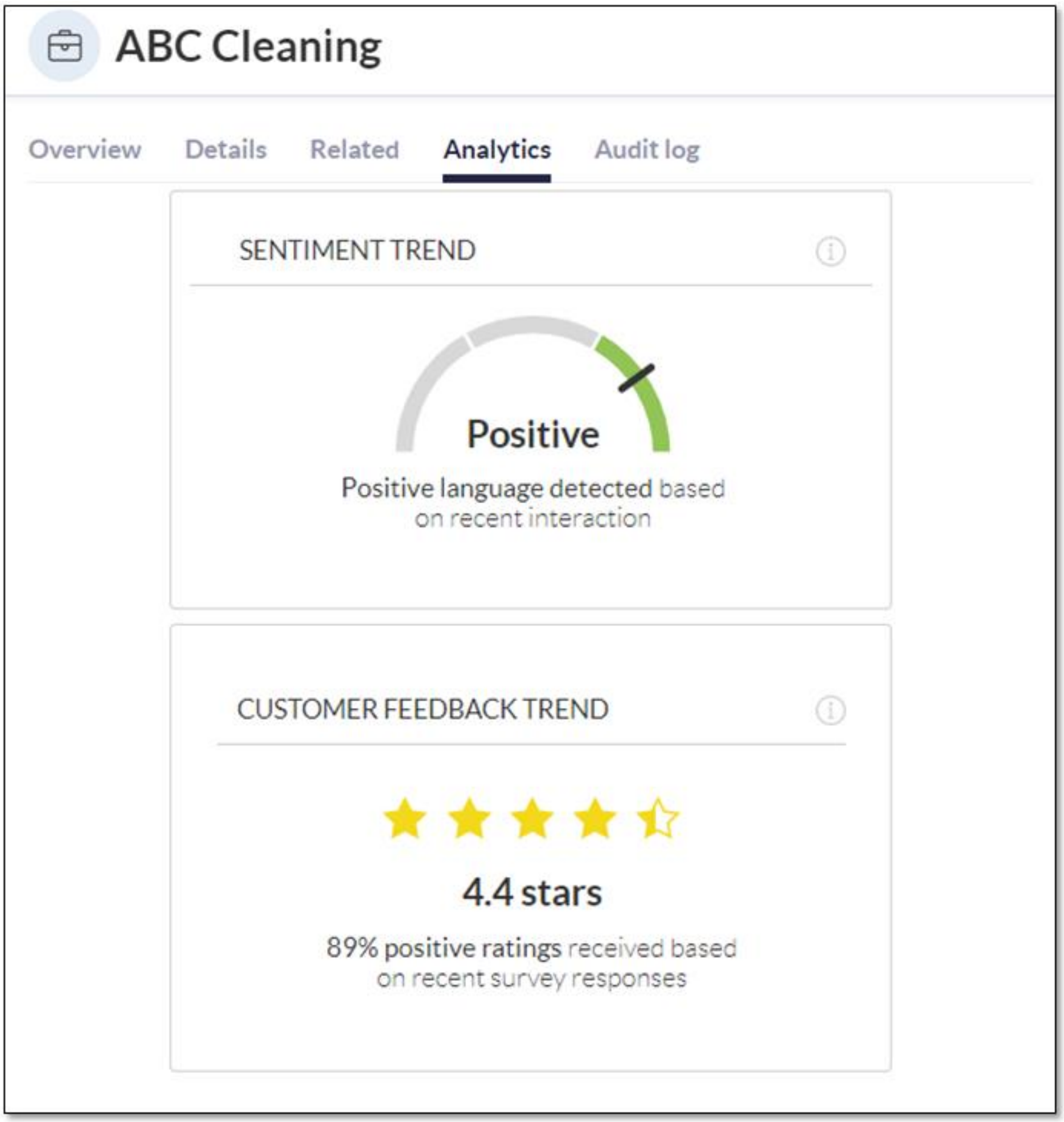


Add/Create New Options

Analytics Tab

On the **Analytics** tab, view and quickly reference the Sentiment Trend and Customer Feedback details.

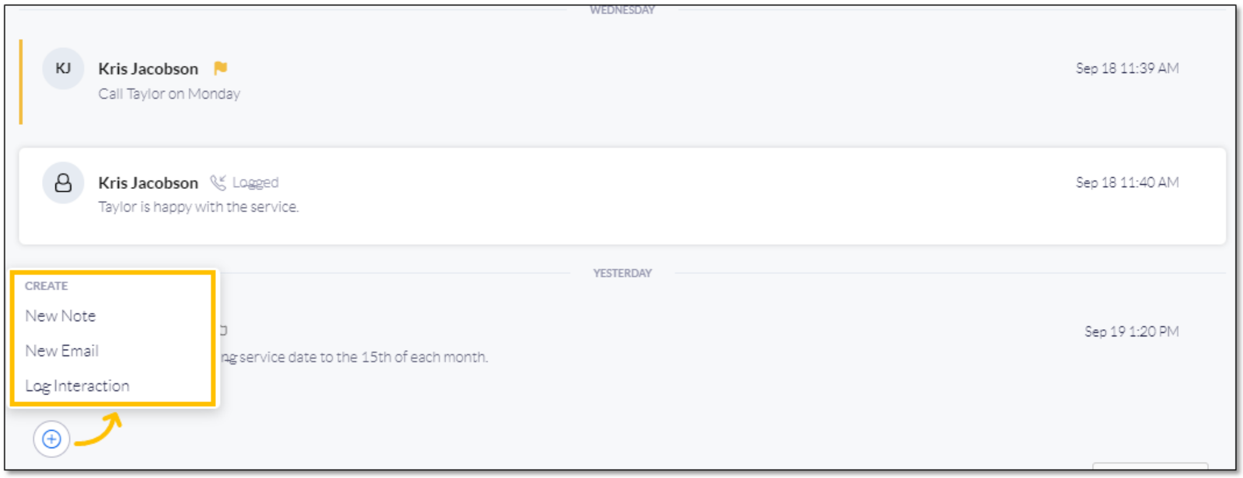
- **Sentiment Trend works to** estimate the customer's current disposition. Nextiva CRM calculates this metric by gathering positive and negative keywords in the Account's activities and SmartTopics. This can be customized based on customer needs and industry.
- **Customer Feedback Trend** reports the outcome of any surveys the customer has completed.



Analytics Tab

Interaction History

View all recent communication on the **Interaction History** feed to the right of the Workspace. Users can also create a Note, Email, and Log Interactions by clicking the **Plus** (**+**) icon on the bottom-left corner of the **Interaction History** feed.

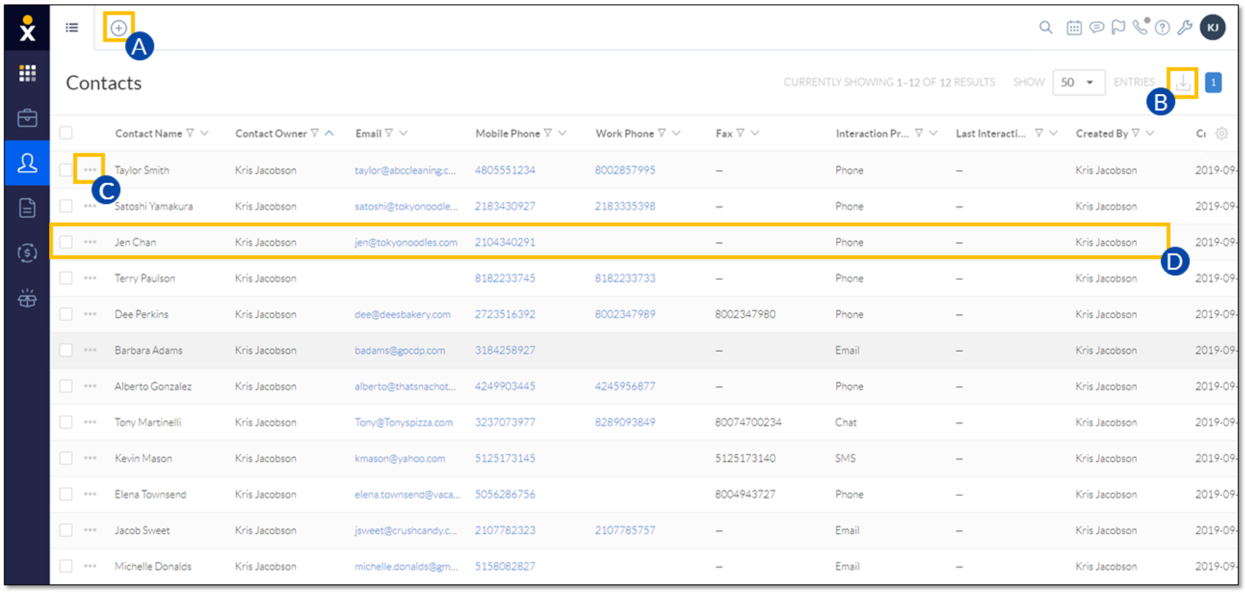


Interaction History Feed

Contacts

A **Contact** is a CRM record used to store necessary customer information, such as name, contact information, address information, and more. Users can associate a Contact with other CRM records, such as Accounts, Cases, and Opportunities.

Click **Contact** from the left-panel to view all Contact records in Nextiva CRM.



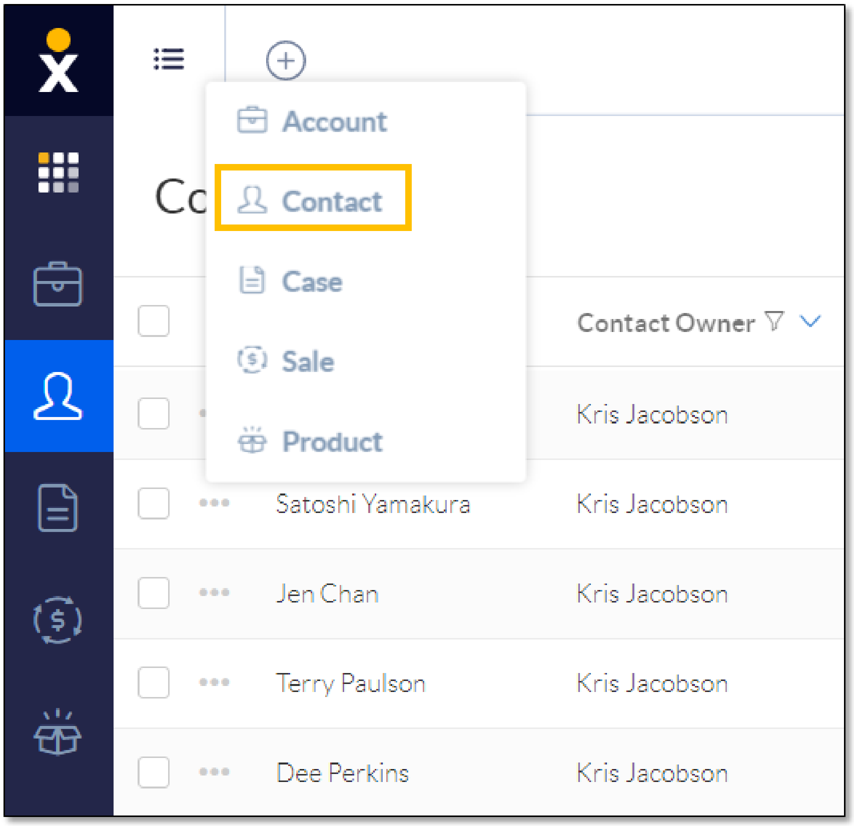
Contact View

Users can perform the following actions in Contact view:

A. Click the **Plus (+)** icon to add a new record (Account, Contact, Case, Lead, Opportunity, Product, or a custom record type).
B. Select the checkbox(es) corresponding to the desired Contact(s) and click the **Export** icon to export the Contacts data to a **.csv** file.
C. Click the **Ellipsis (...)** icon corresponding to a Contact to open a list of contextual actions. Users can use this menu as a shortcut to create system records related to the Contact.
D. Click the row corresponding to a Contact to view the Contact Workspace.

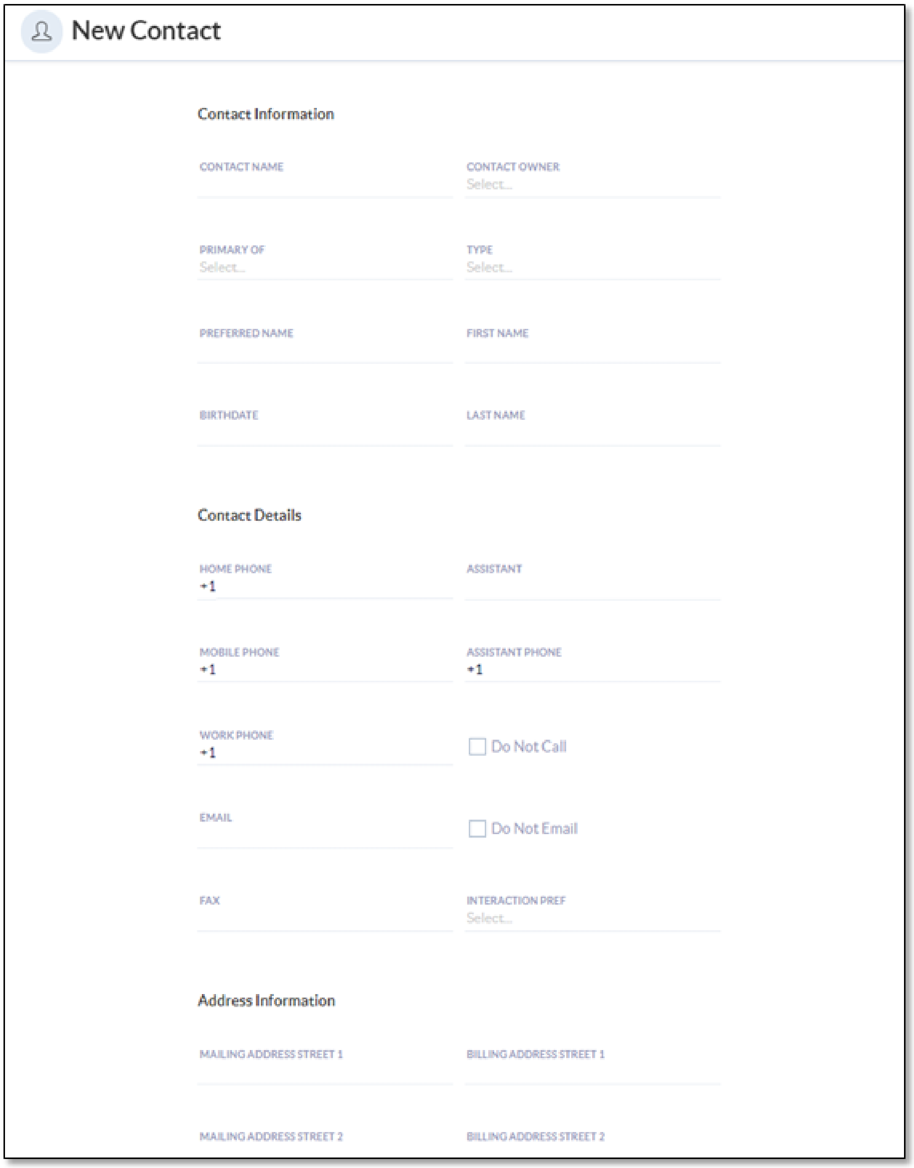
Creating Contacts

1. Click the **Plus (+)** icon and select **Contact**.



Contact Option

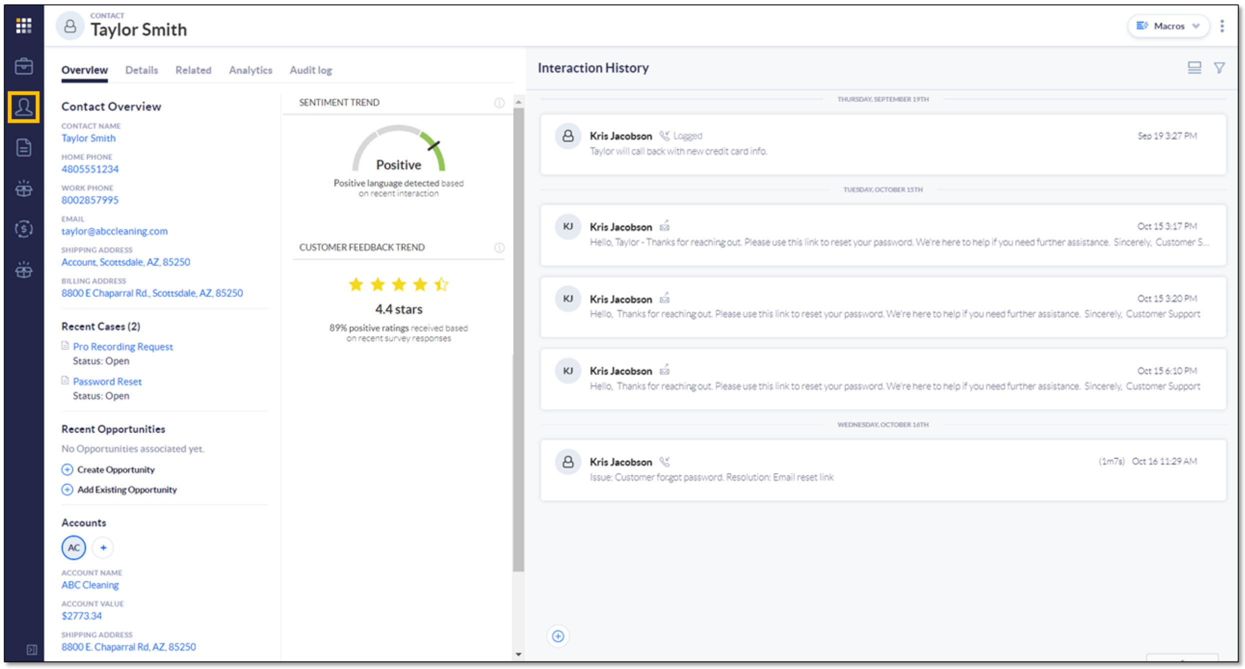
2. Complete the **New Contact** form and click **Create**.



New Contact Form

Contact Workspace

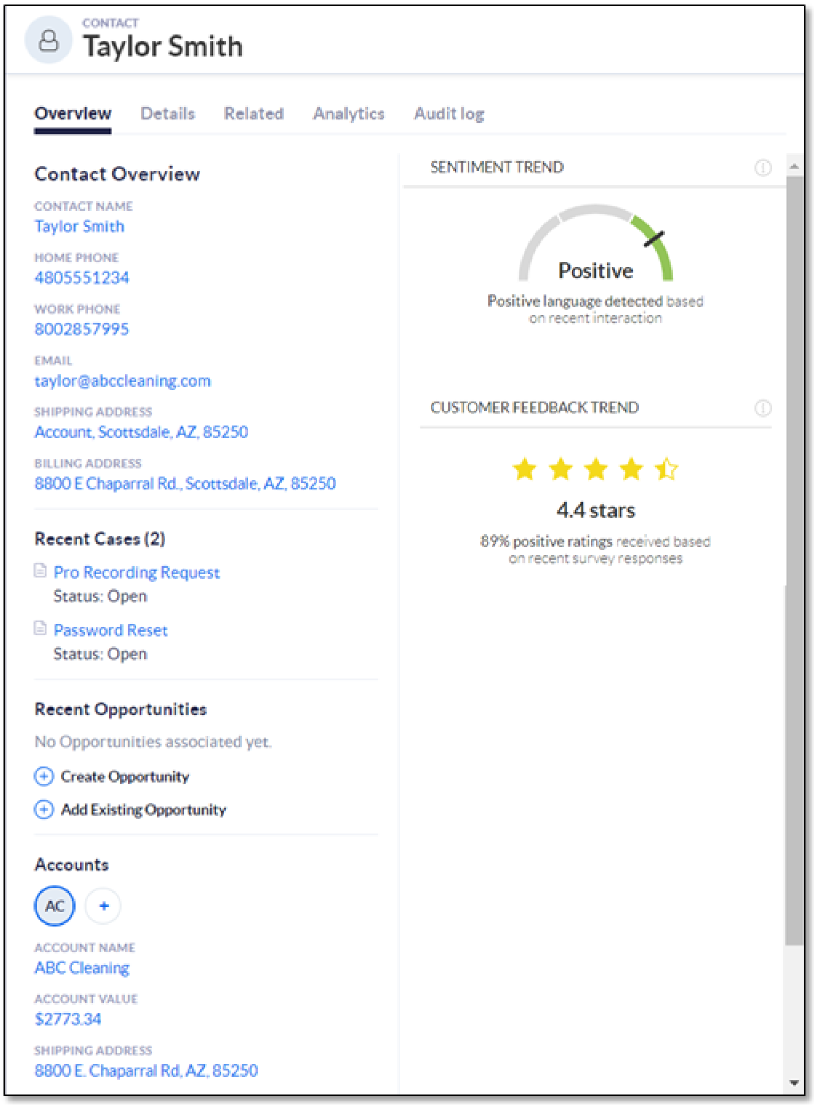
In the **Contact** view, search and select a Contact to view the **Contact Workspace**. The Workspace allows Users to easily view and edit Contact details, Relationships, Interactions, Analytics, and more.



Contact Workspace

Overview Tab

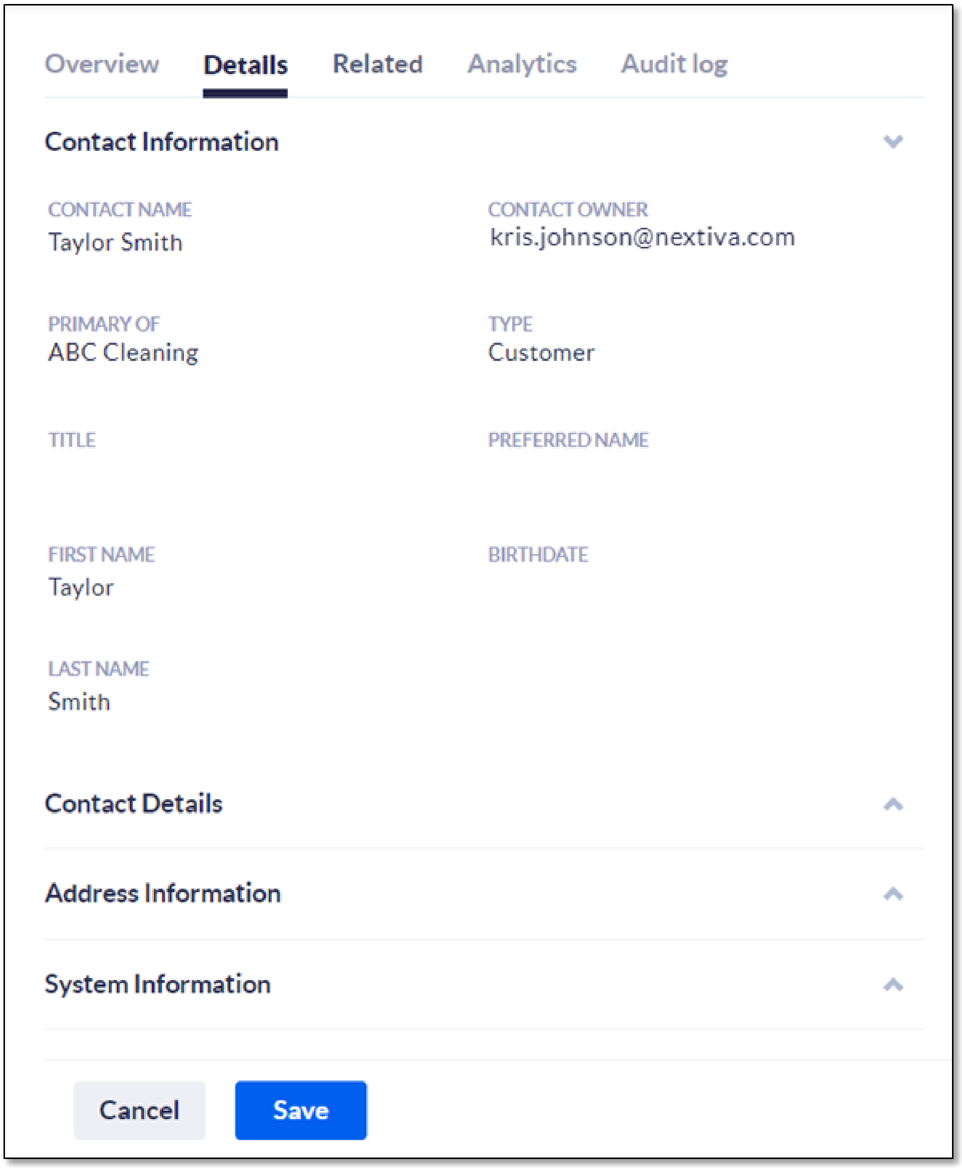
The **Overview** tab displays necessary Contact information, such as Contact name, phone numbers(s), email, shipping and billing addresses. Recent Cases and Opportunities associated with the Contact also appear on the Overview tab.



Overview Tab

Details Tab

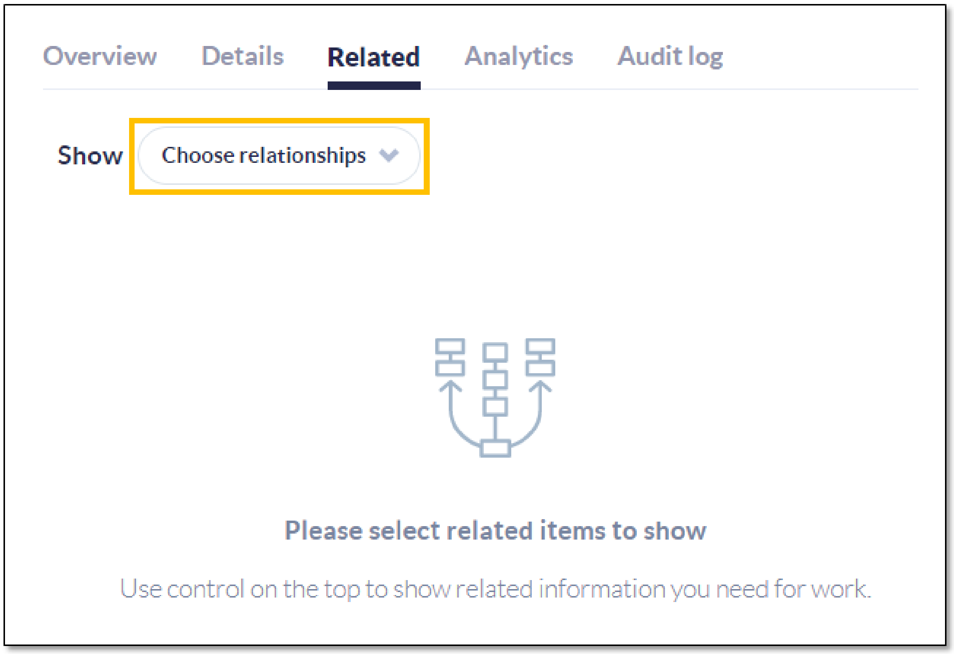
The **Details** tab allows Users to view and edit Contact information, Contact Details and Address Information.



Details Tab

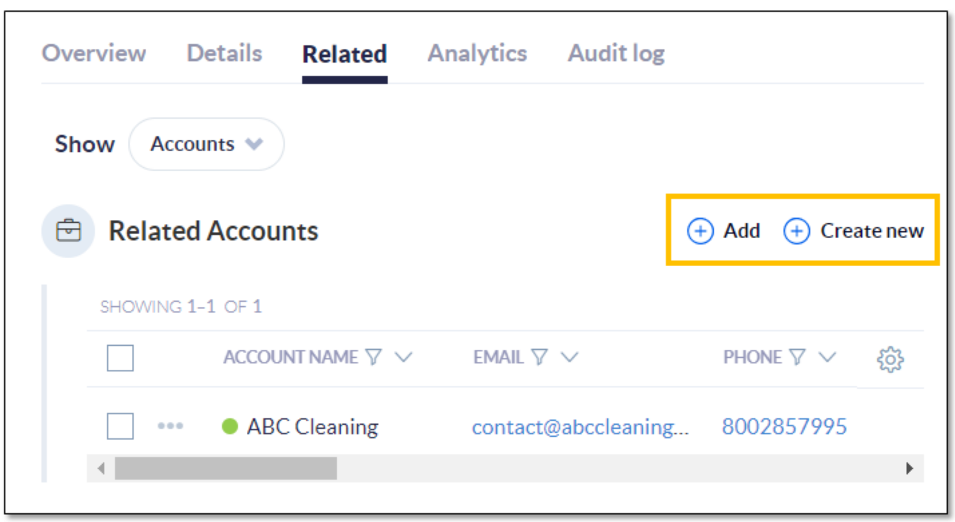
Related Tab

The **Related** tab displays all relationships associated with the Contact. Click **Choose relationships** and select the desired record type(s) (**Cases**, **Accounts**, **Opportunities**) from the drop-down menu.



Related Tab

To associate an existing record, such as an Account, with a Contact, hover over the top-right corner above the table and click **Add**. Click **Create new** to automatically associate and create a new record type.

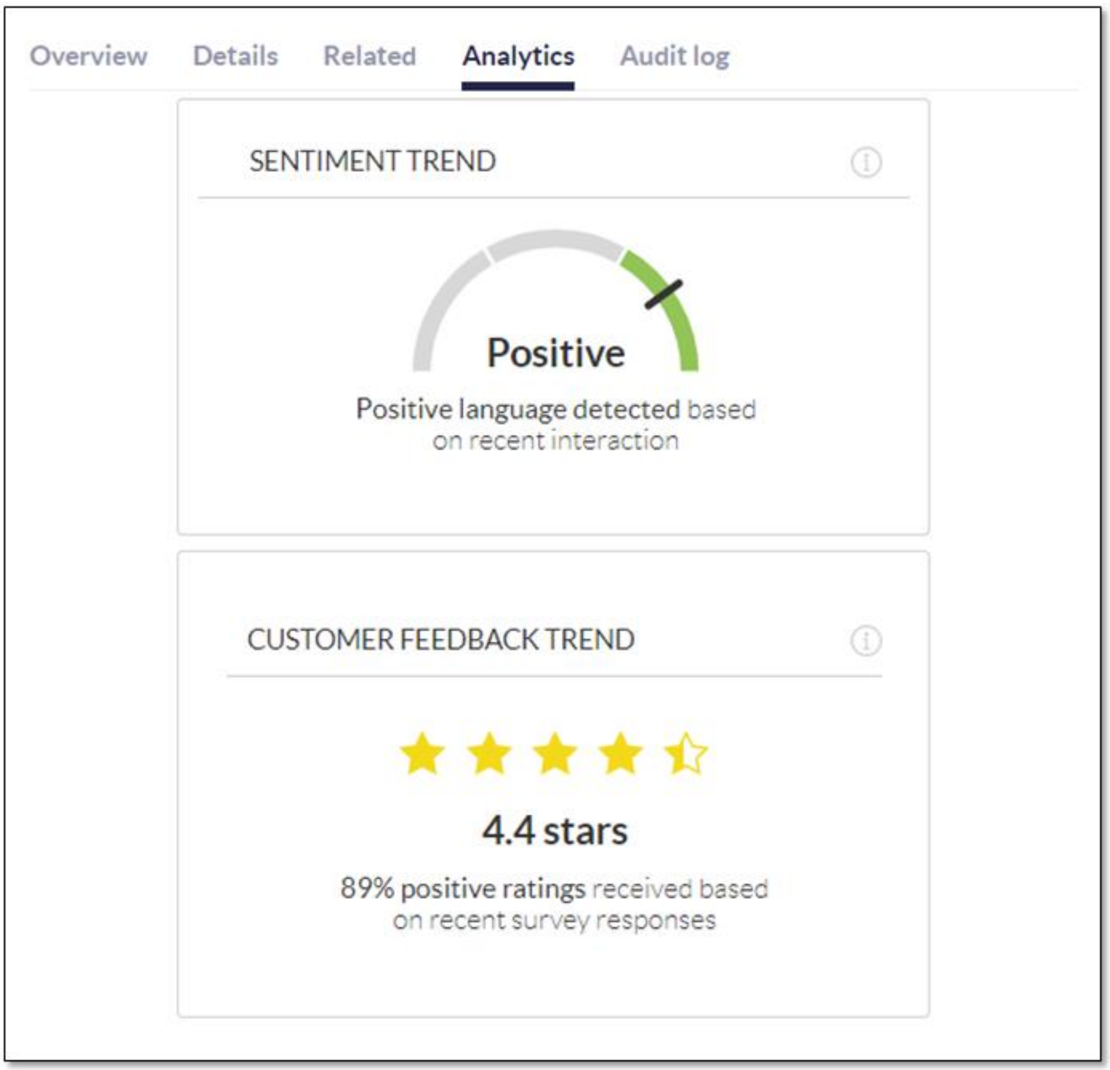


Add/Create New Options

Analytics Tab

On the **Analytics** tab, view and quickly reference the Sentiment Trend and Customer Feedback details.

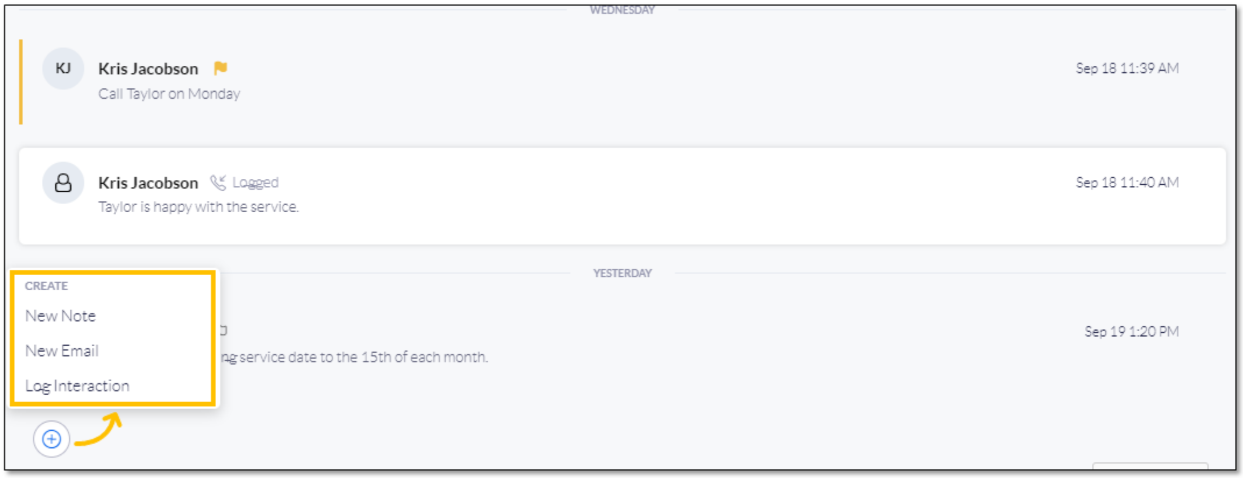
- **Sentiment Trend works to** estimate the customer's current disposition. Nextiva CRM calculates this metric by gathering positive and negative keywords in the Account's activities and SmartTopics. This can be customized based on customer needs and industry.
- **Customer Feedback Trend** reports the outcome of any surveys the customer has completed.



Analytics Tab

Interaction History

View all recent communication on the **Interaction History** feed to the right of the Workspace. Users can also create a Note, Email, and Log Interactions by clicking the **Plus** (**+**) icon on the bottom-left corner of the **Interaction History** feed.



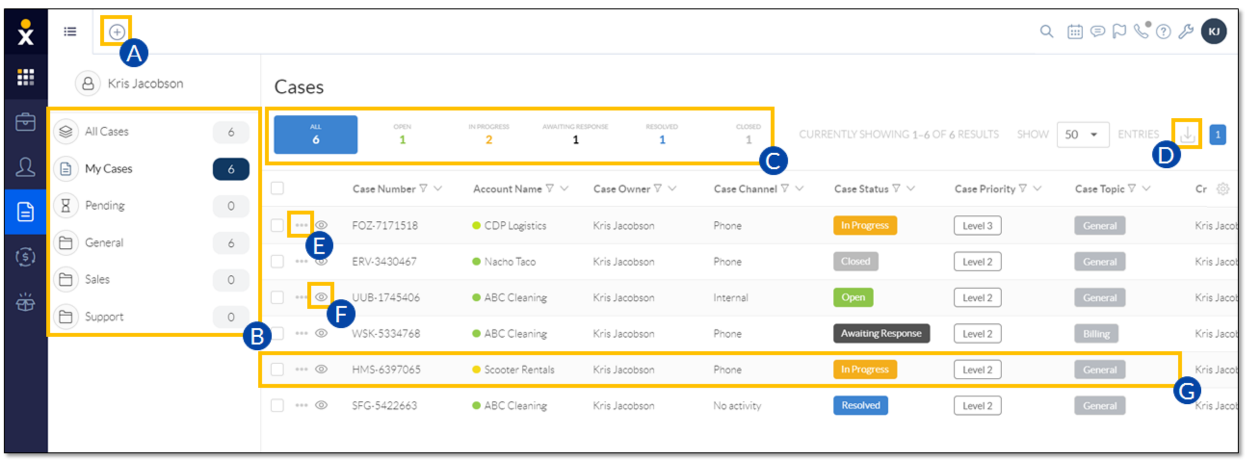
Interaction History Feed

Cases

Users can track customer issues or requests and customer interactions with **Cases** in Nextiva CRM. Each Case contains:

- A description of the customer's issue or request
- The history of interactions between the company and the customer
- The staff working on the Case
- The company's priority for the Case
- The status of the Case

Click **Case** from the left-panel to view all Cases in Nextiva CRM.



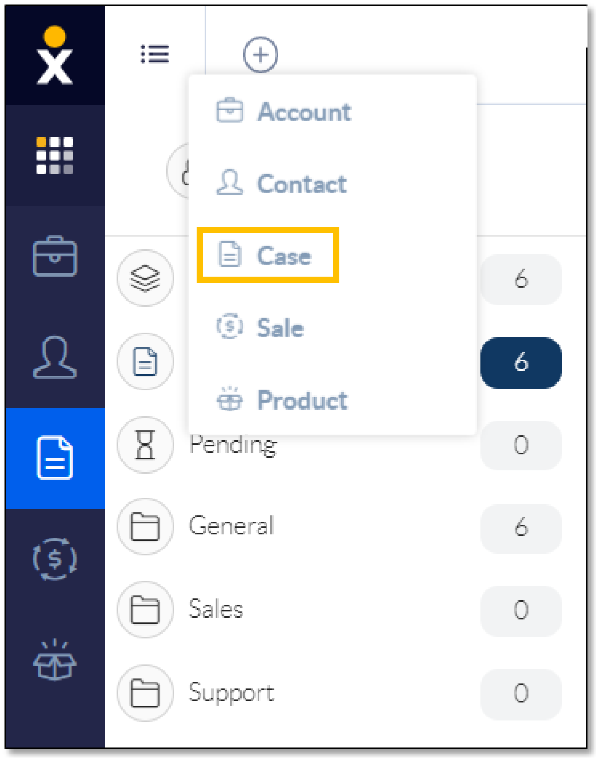
Case View

Users can perform the following actions in Case view:

A. Click the **Plus (+)** icon to add a new record (Account, Contact, Case, Lead, Opportunity, Product, or a custom record type).
B. Filter and sort Cases by Department.
C. Filter and sort Cases by status (**All**, **Open**, **In Progress**, **Awaiting Response**, **Resolved**, and **Closed**).
D. Select the checkbox(es) corresponding to the desired Case(s) and click the **Export** icon to export the Cases data to a **.csv** file.
E. Click the **Ellipsis (...)** icon corresponding to a Case to open a list of contextual actions, such as **Watch** and **Create Sub Cases**.
F. Click the **Eye** icon to preview the Case.
G. Click the row corresponding to the Case to view the Case Workspace.

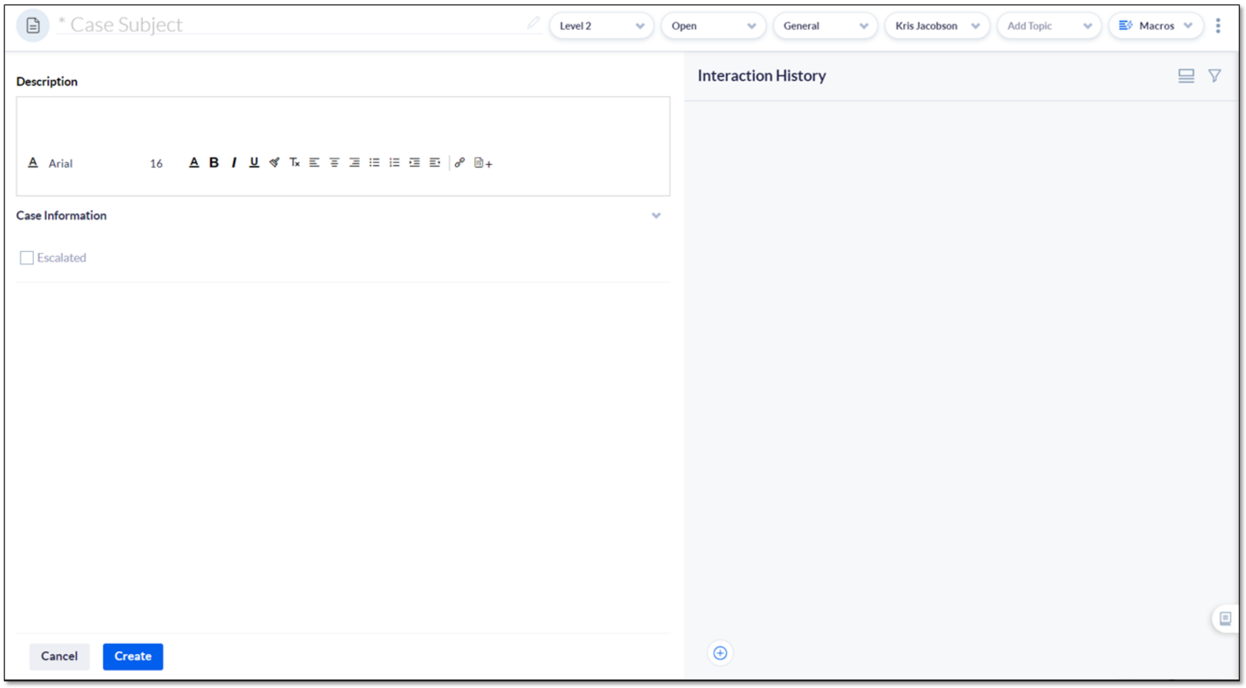
Creating Cases

1. Click the **Plus (+)** icon and select **Case.**



Case Option

2. At the top of the form, enter a **Case Subject** (required).
3. Choose the following parameters from the drop-down lists:
   - **Priority**: The urgency of the Case. The priority defaults to **Urgent**.
   - **Status**: The status of the Case. The status defaults to **Open**.
   - **Department:** The department to which the Case is assigned.
   - **Owner:** The user to which the Case is assigned.
   - **Topic**: The category that best summarizes the Case (required).
4. In the **Description** section, enter a summary of the Case. Users can format the text, insert links, and add Predefined Text.



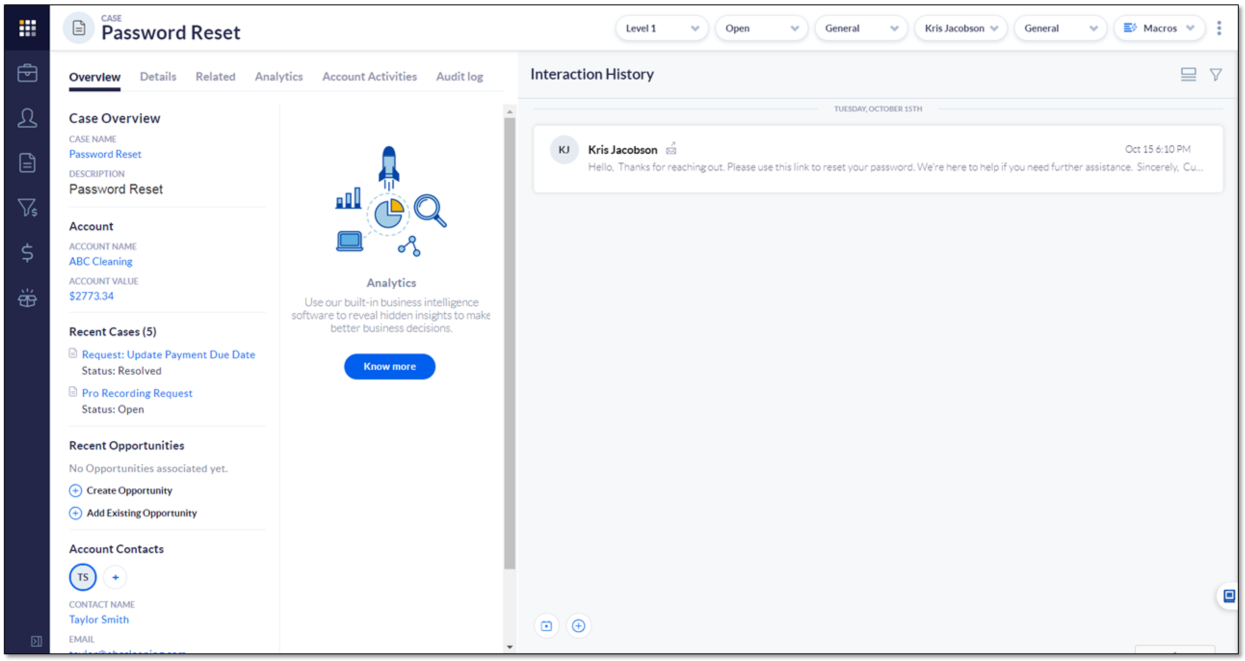
New Case Form

5. Click **Create**. Once the Case is created, Users can create a Note, Email, and Log Interactions by clicking the **Plus** (+) icon on the bottom-left corner of the **Case Interaction** feed.

    NOTE: Users can also create and automatically associate Cases from any Workspace under the **Related** tab.

Case Workspace

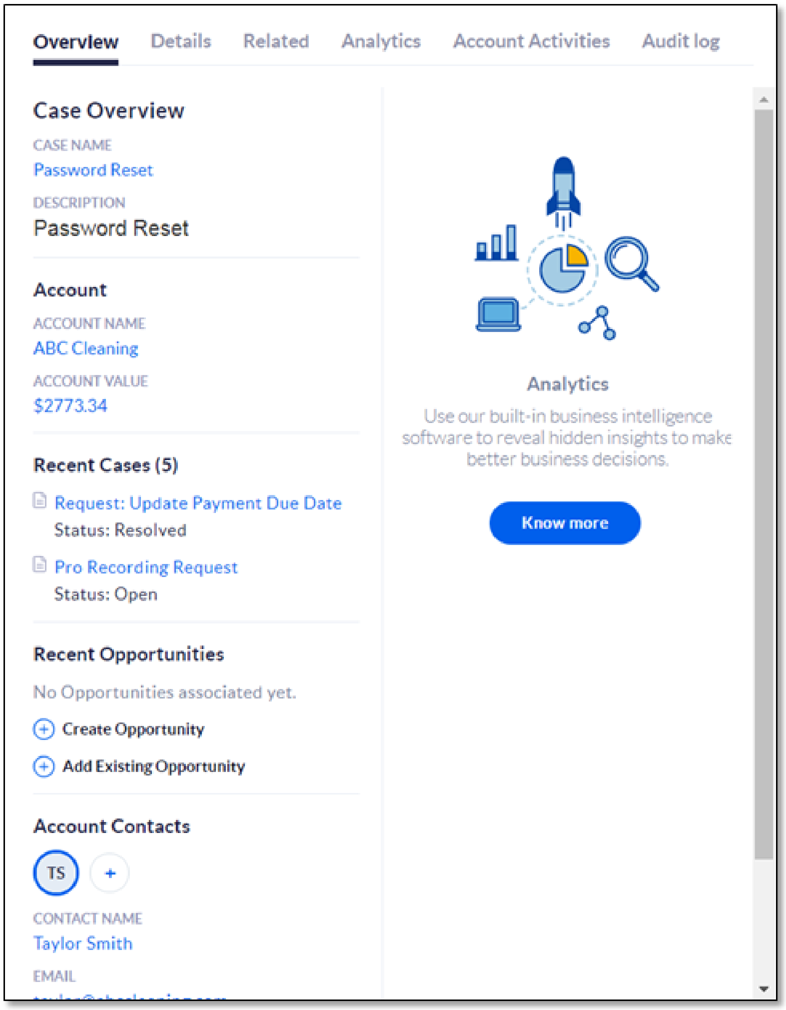
In the **Case** view, search and select a Case to view the **Case Workspace**. The Workspace allows Users to easily view and manage Case details, Relationships, Interactions, Analytics, and more.



Case Workspace

Overview Tab

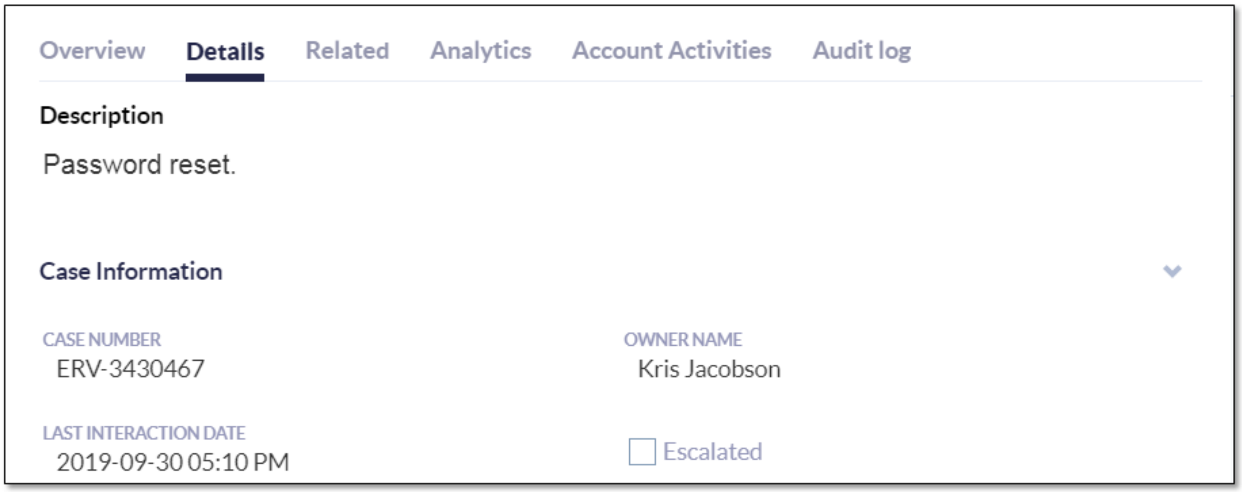
The **Overview** tab displays necessary Case details, including Account and Contact details. Recent Cases and Opportunities associated with the Case also appear on the Overview tab.



Case Overview

Details Tab

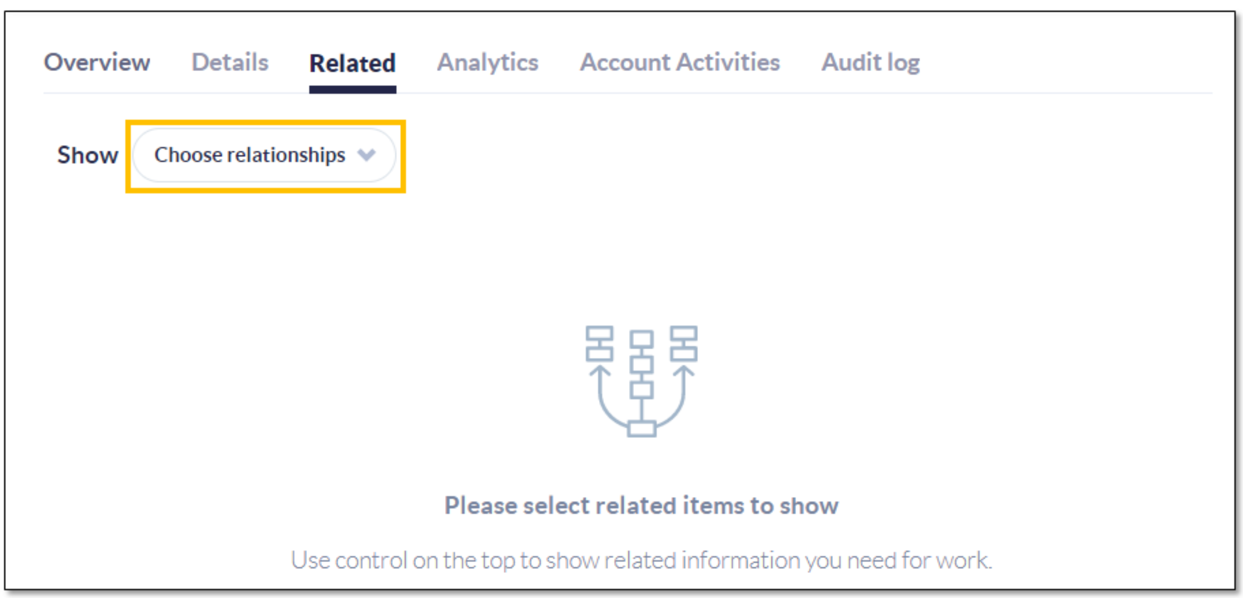
The **Details** tab allows Users to view Case information, such as the Case number, owner, last, and interaction date. Users can also view and edit the Case Description.



Details Tab

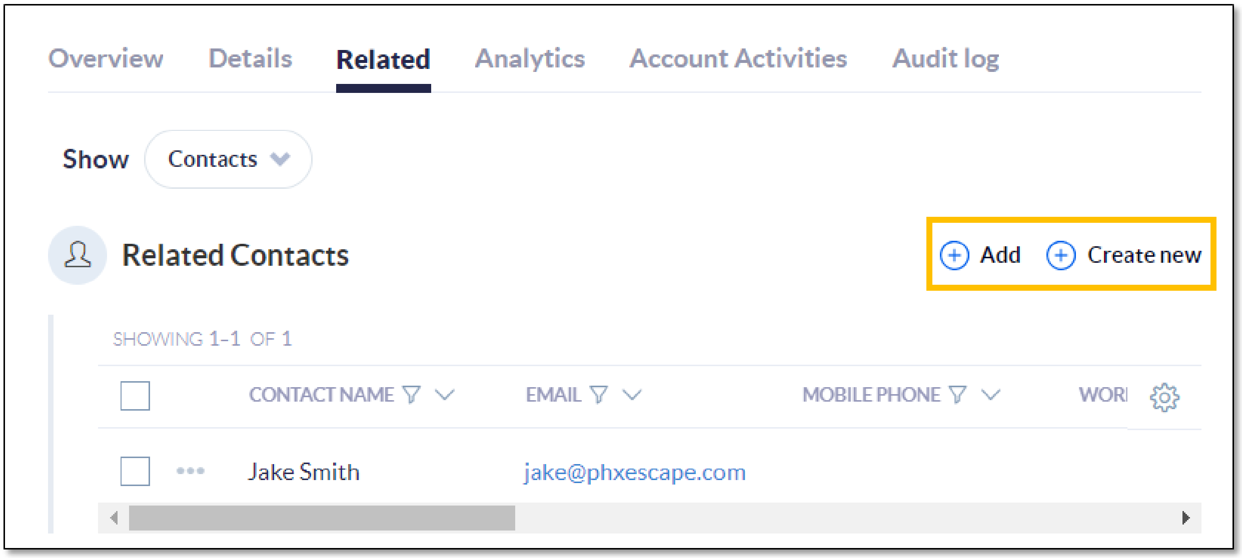
Related Tab

The **Related** tab displays all relationships associated with the Case. Click **Choose relationships** and select the desired record type(s) (**Account**, **Contact**, **Parent/Sub Cases**) from the drop-down menu.



Related Tab

To associate an existing record, such as an Account, with a Case, hover over the top-right corner above the table and click **Add**. Click **Create new** to automatically associate and create a new record type. For example, ABC Cleaning calls in wanting to update billing information. The Agent handling the call can associate the new Case with the Account here.



Add/Create New Options

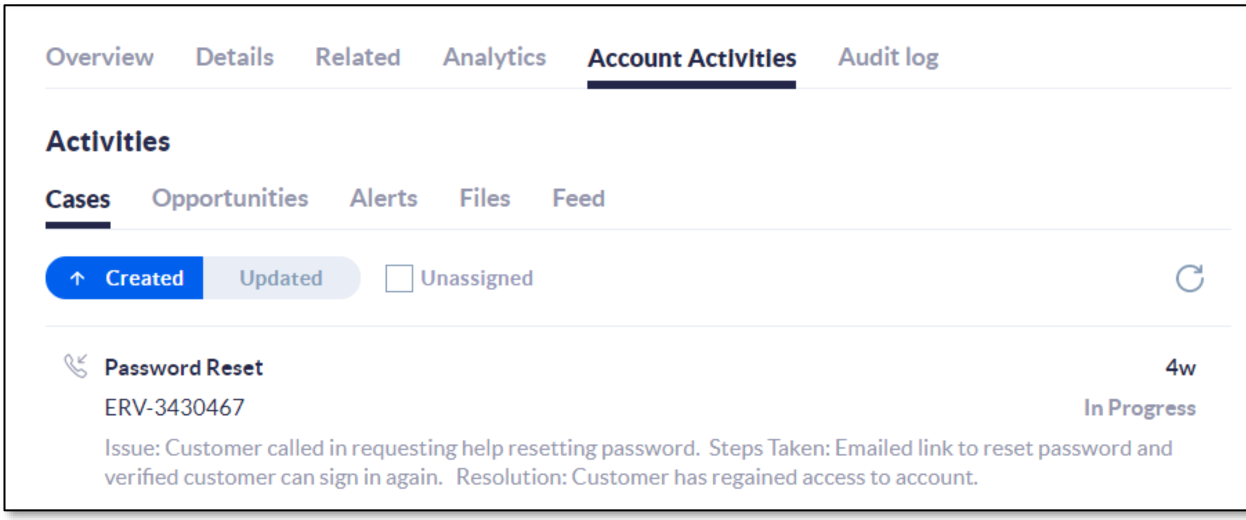
Analytics Tab

On the **Analytics** tab, view and quickly reference the Sentiment Trend and Customer Feedback details.

- **Sentiment Trend** estimates the customer's current disposition. Nextiva CRM calculates this metric by gathering positive and negative keywords in the Account's activities and SmartTopics. This can be customized based on customer needs and industry.
- **Customer Feedback Trend** reports the outcome of any surveys the customer has completed.

Account Activities

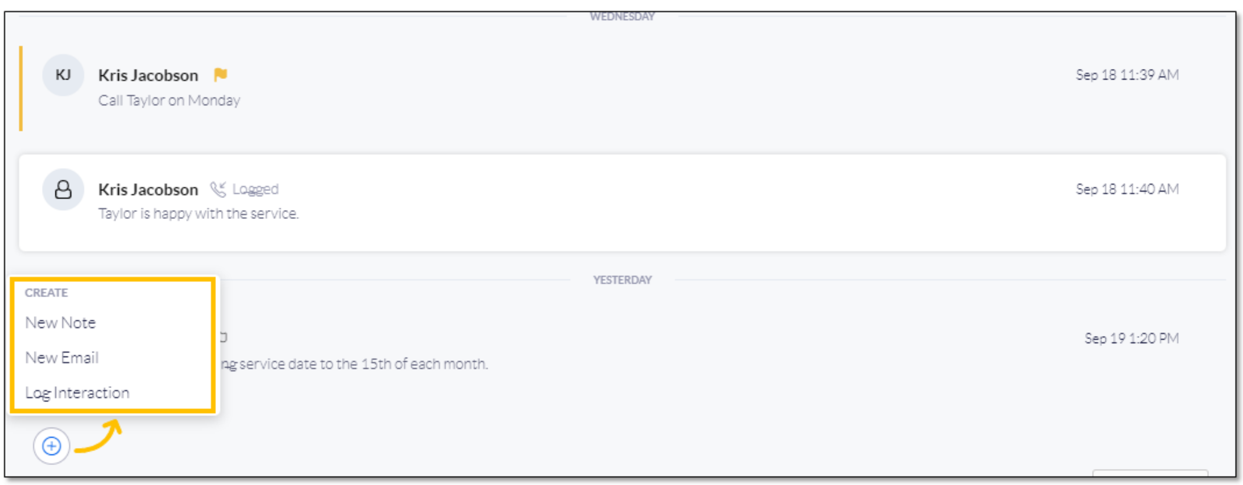
If the case is associated with an Account, the **Account Activities** tab will display all Cases related to the Account. Users can sort Cases by last **Created**, **Updated,** or filter only **Unassigned** Cases.



Account Activities Tab

Interaction History

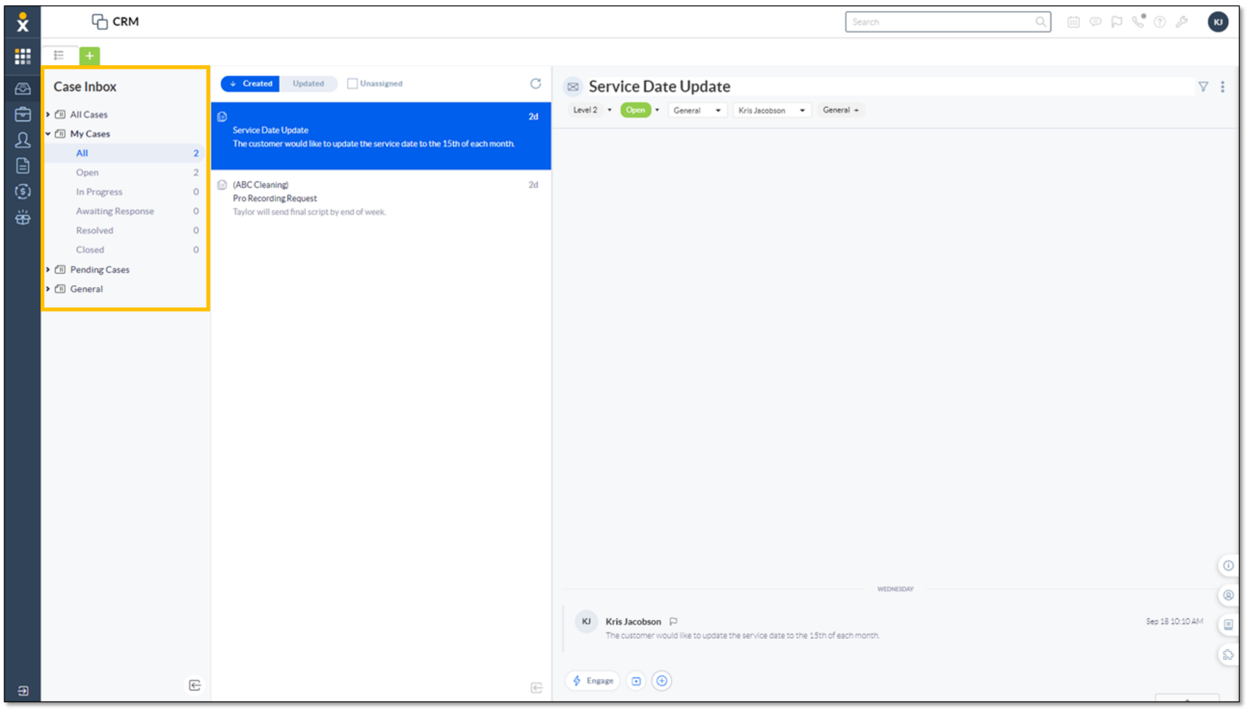
Users can also create a Note, Email, and Log Interactions by clicking the **Plus** (+) icon on the bottom-left corner of the **Interaction History** feed.



Interaction History Feed

Case Inbox

The **Case Inbox**, the main view for interacting with cases, allows users to filter and sort cases by status (All, Open, In Progress, Awaiting Response, Resolved, and Closed) or by department from the left panel. **Case Inbox** allows users to quickly view and manage cases and interact with clients from one place.



Case Inbox

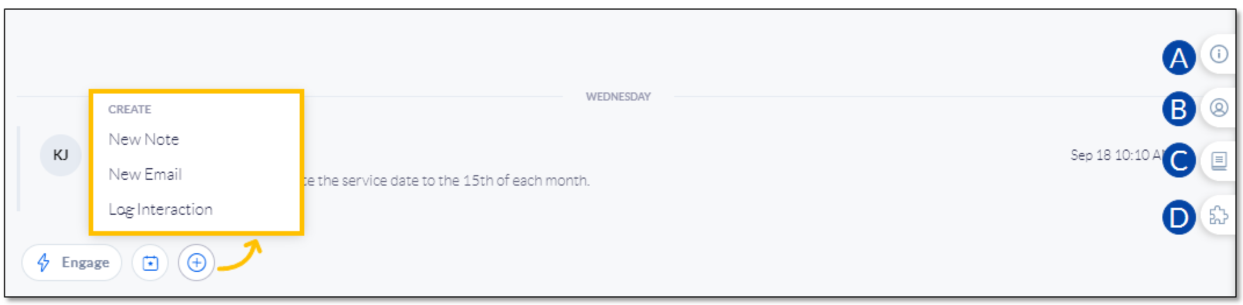
By default, the **Case Inbox** displays **My Cases** when first opened. My Cases display all Cases assigned to the User. Click any case to view all interactions and details for that case in the right panel.

Case Header

A. Edit the case subject by clicking the subject and modifying the text.
B. Filter case interactions to display all interactions, emails, calls, internal notes, or chats.
C. Update the priority of the case.
D. Update the status of the case.
E. Update the department to which the case is assigned.
F. Update the owner of the case.
G. Update the topic that best summarizes the case.

To view the Case Workspace, click the **Engage** button on the bottom-left corner of the **Case Interaction** feed.

Users can also create a Note, Email, and Log Interactions by clicking the **Plus** (+) icon on the bottom-left corner of the **Interaction History** feed.



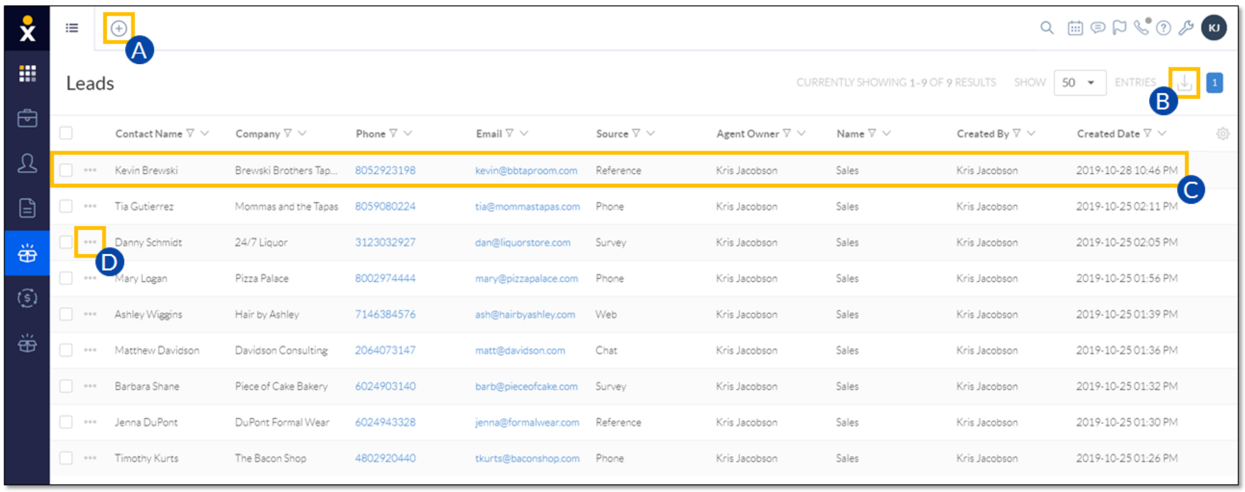
Case Interaction Feed Options

A. View high-level case information.
B. Quickly view contact information and recent activity.
C. View any internal wiki articles for reference.
D. View any integrations.

Leads

Leads in Nextiva CRM help Users manage and qualify potential prospects. Creating Leads is the first official stage of the sales life cycle. A "discovery" call occurs during this stage to determine if the lead is "qualified" or not. Once a Lead has been qualified in Nextiva CRM, Users can track it through the remaining stages of the sales life cycle under Opportunities.

Click **Lead** from the left panel to view all Lead records in Nextiva CRM.



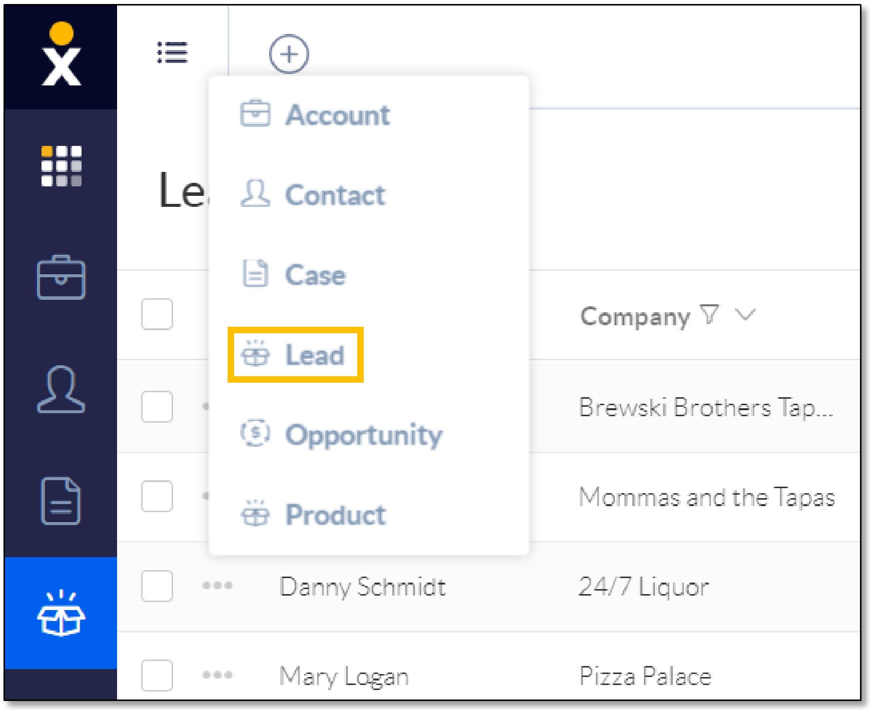
Lead View

Users can perform the following actions in Lead view:

A. Click the **Plus (+)** icon to add a new record (Account, Contact, Case, Lead, Opportunity, Product, or a custom record type).
B. Select the checkbox(es) corresponding to the desired Lead(s) and click the **Export** icon to export the Leads data to a **.csv** file.
C. Click the row corresponding to the Lead to view the Lead Workspace.
D. Click the **Ellipsis (...)** icon corresponding to a Lead to open a list of contextual actions (**Watch**, **Open in Background**, and **Delete**).

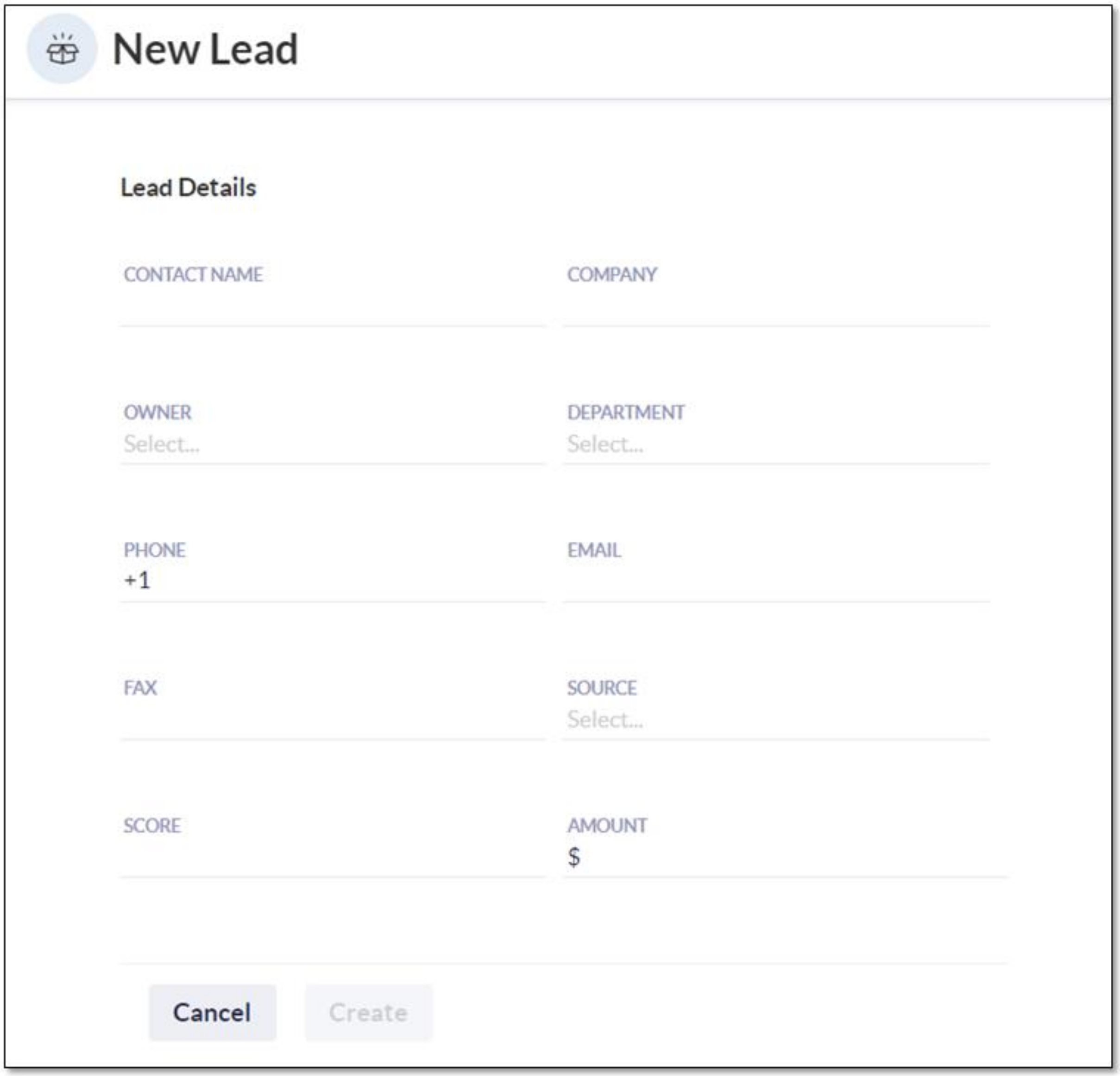
Creating Leads

1. Click the **Plus (+)** icon and select **Lead.**



Lead Option

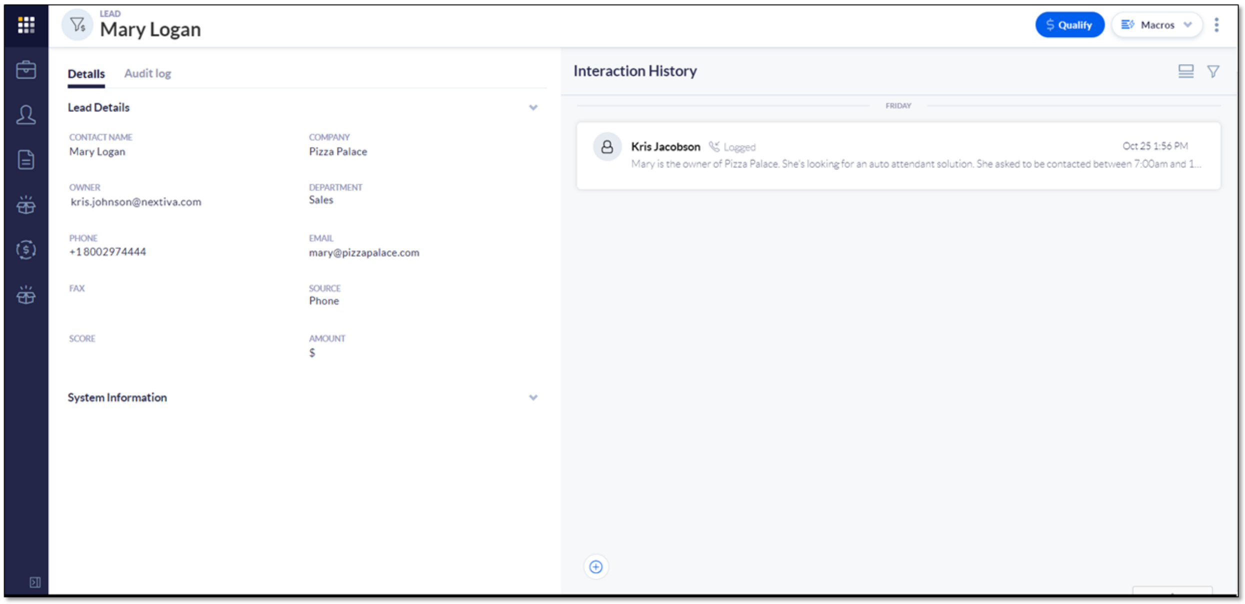
2. Complete the **New Lead** form. Click **Create**.



New Lead Form

Lead Workspace

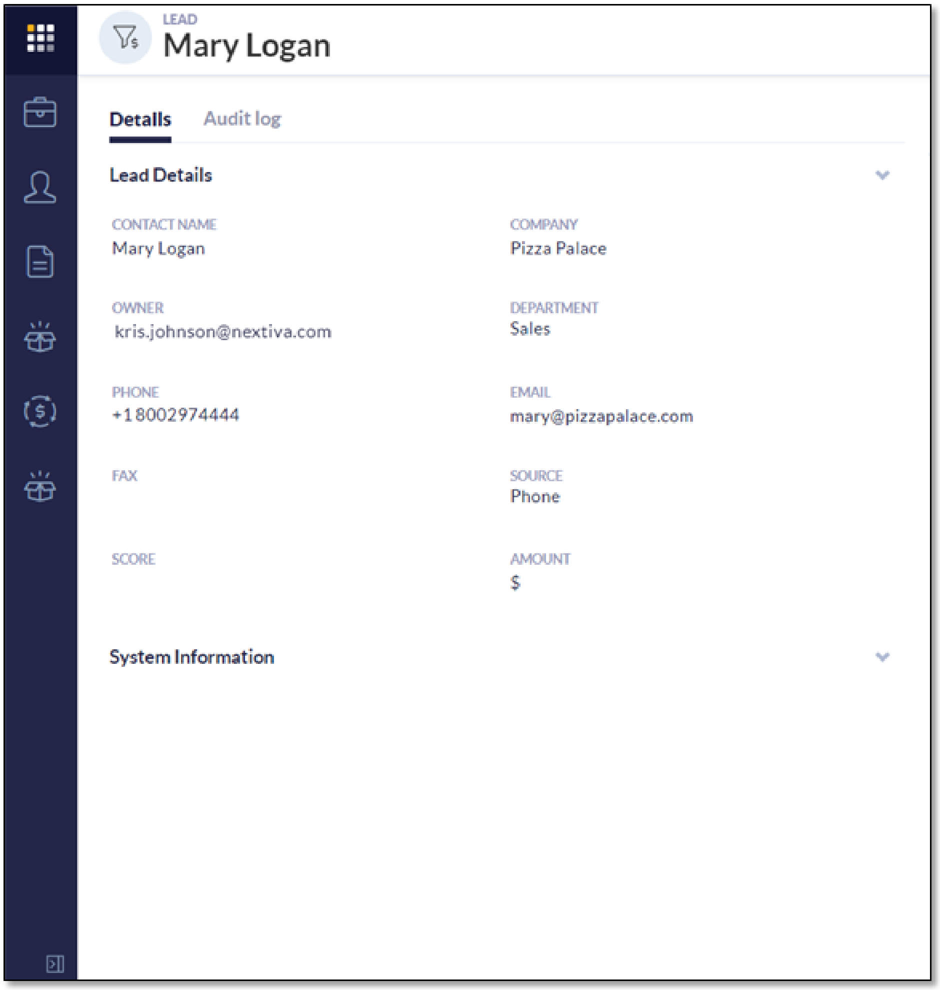
In the **Lead** view, select a Lead to view the **Lead Workspace**. The Workspace allows Users to easily view and edit Lead details, add Interactions, and qualify Leads to Opportunities.



Lead Workspace

Details Tab

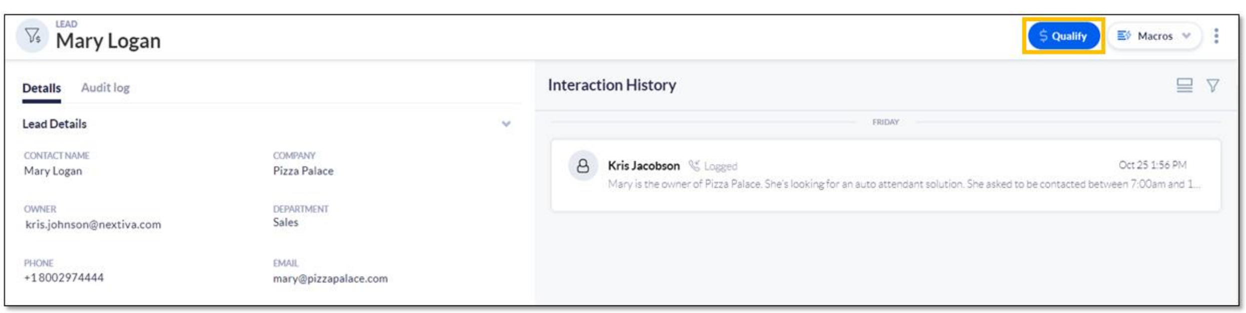
The **Details** tab allows Users to view and edit the Lead information, such as the contact name, company, phone number, email, and more.



Details Tab

Qualify a Lead

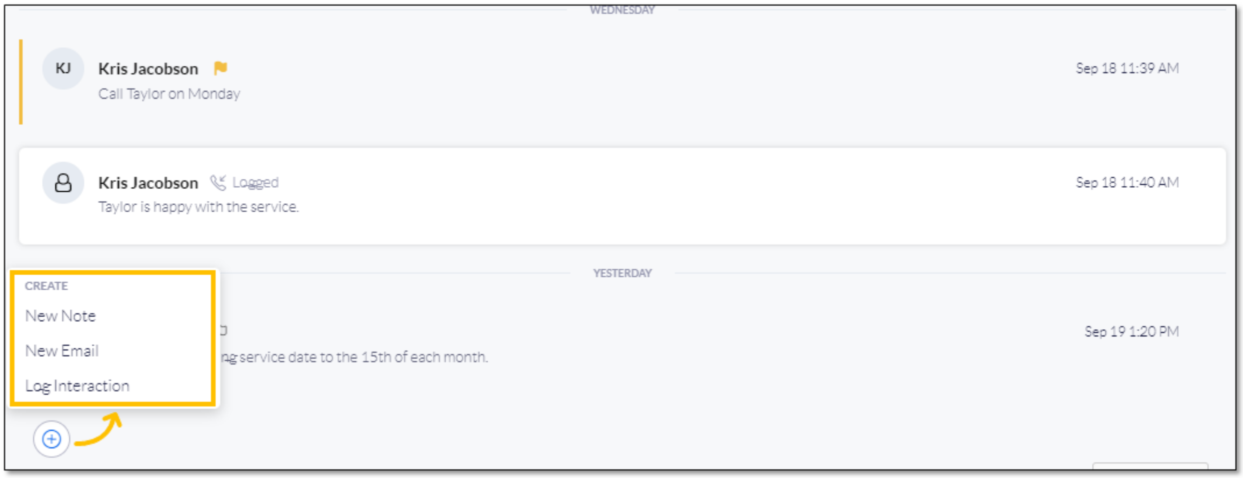
Users can qualify Leads to Opportunities by clicking the **Qualify** button on the top-right corner. Once a Lead has been qualified to an Opportunity, it cannot be moved back to the Lead stage.



Qualify Button

Interaction History

Users can also create a Note, Email, and Log Interactions by clicking the **Plus** (+) icon on the bottom-left corner of the **Interaction History** feed.

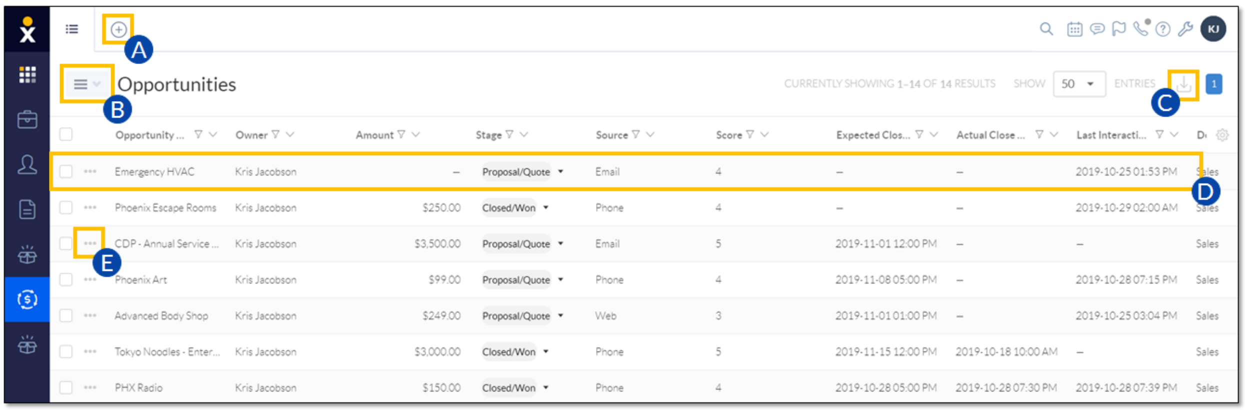


Interaction History Feed

Opportunities

Opportunities in Nextiva CRM helps Users manage each stage of the sales life cycle after qualifying a Lead. Users can associate Products to Opportunities to automatically calculate the Product total and display the value of the Opportunity. Users can override the Product total by entering an amount to reflect discounts or markups.

Click **Opportunity** from the left panel to view all Opportunity records in Nextiva CRM.



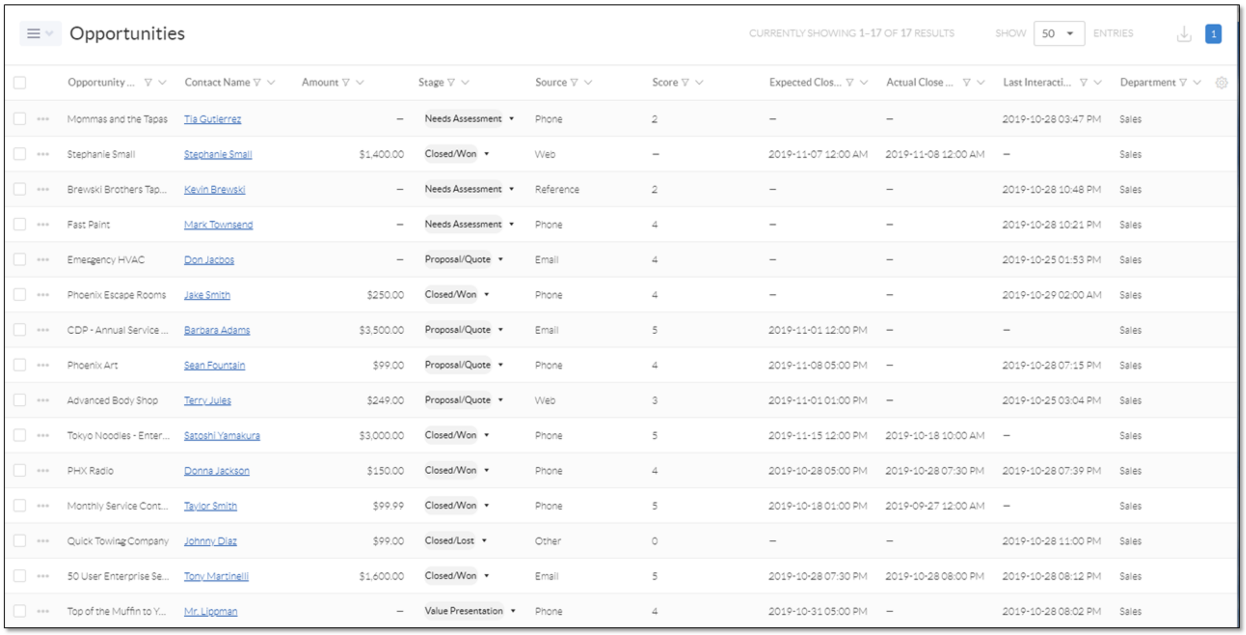
Opportunity View

Users can perform the following actions in Opportunity view:

A. Click the **Plus (+)** icon to add a new record (Account, Contact, Case, Lead, Opportunity, Product, or a custom record type).
B. Select **Table** or **Board** view. For information, see below.
C. Select the checkbox(es) corresponding to the desired Opportunity and click the **Export** icon to export the Opportunities data to a **.csv** file.
D. Click the row corresponding to the Opportunity to view the **Opportunity Workspace**.
E. Click the **Ellipsis (...)** icon corresponding to an Opportunity to open a list of contextual actions. Users can use this menu as a shortcut to create system records related to the Opportunity.

Table View

The Table view displays a list of Opportunities as rows in a table with columns of information.



Opportunities

CURRENTLY SHOWING 1-17 OF 17 RESULTS SHOW 50 ENTRIES 1

Opportunity ...	Contact Name	Amount	Stage	Source	Score	Expected Clos...	Actual Close ...	Last Interacti...	Department
Mommas and the Tapas	Tia Gutierrez	–	Needs Assessment	Phone	2	–	–	2019-10-28 03:47 PM	Sales
Stephanie Small	Stephanie Small	$1,400.00	Closed/Won	Web	–	2019-11-07 12:00 AM	2019-11-08 12:00 AM	–	Sales
Brewski Brothers Tap...	Kevin Brewski	–	Needs Assessment	Reference	2	–	–	2019-10-28 10:48 PM	Sales
Fast Paint	Mark Townsend	–	Needs Assessment	Phone	4	–	–	2019-10-28 10:21 PM	Sales
Emergency HVAC	Don Jacbos	–	Proposal/Quote	Email	4	–	–	2019-10-25 01:53 PM	Sales
Phoenix Escape Rooms	Jake Smith	$250.00	Closed/Won	Phone	4	–	–	2019-10-29 02:00 AM	Sales
CDP - Annual Service ...	Barbara Adams	$3,500.00	Proposal/Quote	Email	5	2019-11-01 12:00 PM	–	–	Sales
Phoenix Art	Sean Fountain	$99.00	Proposal/Quote	Phone	4	2019-11-08 05:00 PM	–	2019-10-28 07:15 PM	Sales
Advanced Body Shop	Terry Jules	$249.00	Proposal/Quote	Web	3	2019-11-01 01:00 PM	–	2019-10-25 03:04 PM	Sales
Tokyo Noodles - Enter...	Satoshi Yamakura	$3,000.00	Closed/Won	Phone	5	2019-11-15 12:00 PM	2019-10-18 10:00 AM	–	Sales
PHX Radio	Donna Jackson	$150.00	Closed/Won	Phone	4	2019-10-28 05:00 PM	2019-10-28 07:30 PM	2019-10-28 07:39 PM	Sales
Monthly Service Cont...	Taylor Smith	$99.99	Closed/Won	Phone	5	2019-10-18 01:00 PM	2019-09-27 12:00 AM	–	Sales
Quick Towing Company	Johnny Diaz	$99.00	Closed/Lost	Other	0	–	–	2019-10-28 11:00 PM	Sales
50 User Enterprise Se...	Tony Martinelli	$1,600.00	Closed/Won	Email	5	2019-10-28 07:30 PM	2019-10-28 08:00 PM	2019-10-28 08:12 PM	Sales
Top of the Muffin to Y...	Mr. Lippman	–	Value Presentation	Phone	4	2019-10-31 05:00 PM	–	2019-10-28 08:02 PM	Sales

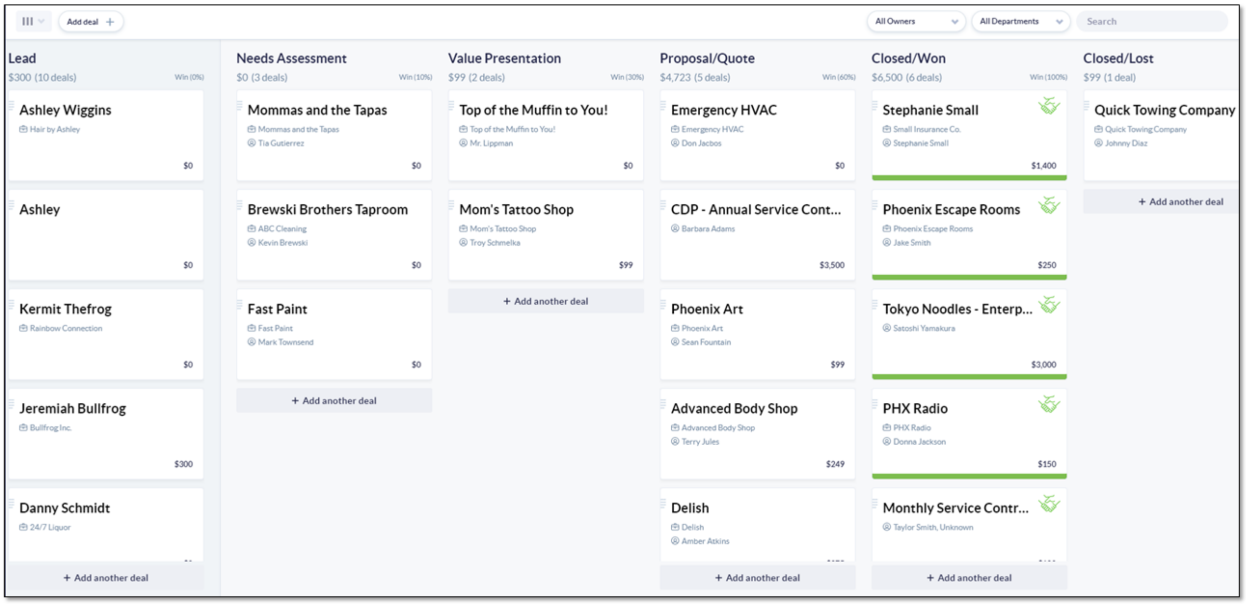
Table View

In the **Table** view, Users can easily manage their Opportunities:

- View important Opportunities information such as the Contact, the value of the proposed sale, the current stage of the sale, expected close date, and more.
- Click-and-drag columns to customize the information layout.
- Search, filter, and sort the information in each column.
- Click a record to view and edit the details of an Opportunity.
- Export the Opportunities to a **.csv** file by clicking the **Export** icon at the top-right corner of the window.

Board View

The **Board** view displays both Leads and Opportunities as tiles on a board that helps Users visualize where prospects are in the sales workflow.



Board View

In the **Board** view, Users can manage and track their sales from start to finish:

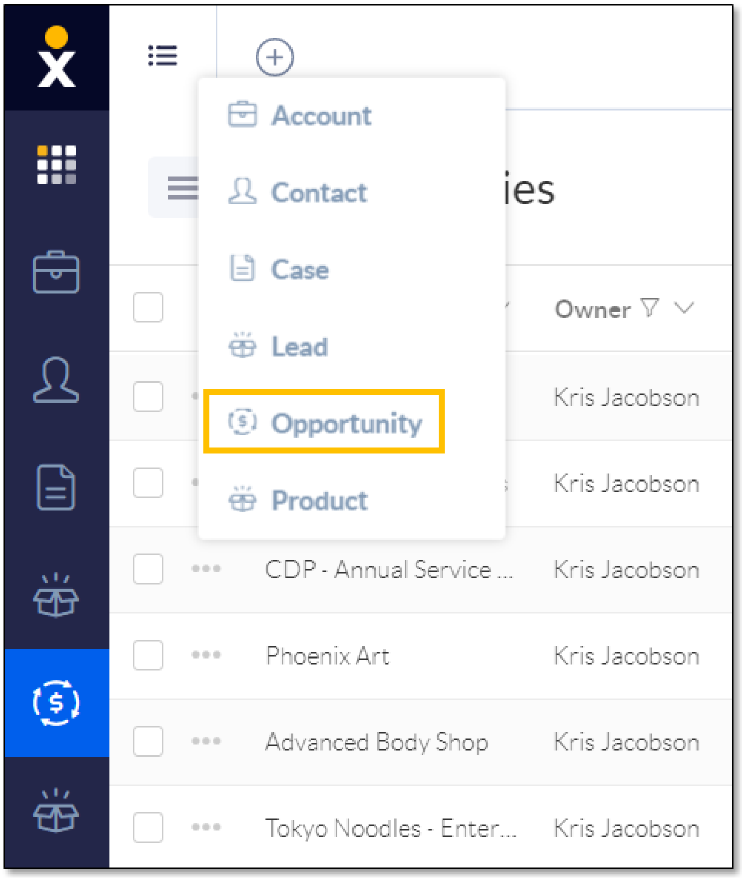
- Qualify a Lead by clicking-and-dragging the tile from the **Lead** column to the first **Opportunity** column.

  NOTE: Once a Lead is qualified, Users cannot click-and-drag the tile back to the **Lead** column.

- Move Opportunities through the stages of a sale (**Needs Assessment**, **Value Presentation** (demo), **Proposal/Quote**, and **Closed/Won** or **Closed/Lost**).
- View how much revenue is in the sales pipeline by stage.
- Add a new Opportunity by clicking the **Add deal +** button at the top-left corner of the window or the **+Add another deal** button at the bottom of any column but the **Lead** column.
- Add a new Lead by clicking the **+Add another deal** button at the bottom of the **Lead** column.
- Filter by **Owner** and **Department.**
- Search by **Lead** and **Opportunity** name.
- Click the record name to view and edit the details of that record.

Creating Opportunities

1. Click the **Plus (+)** icon and select **Opportunity.**



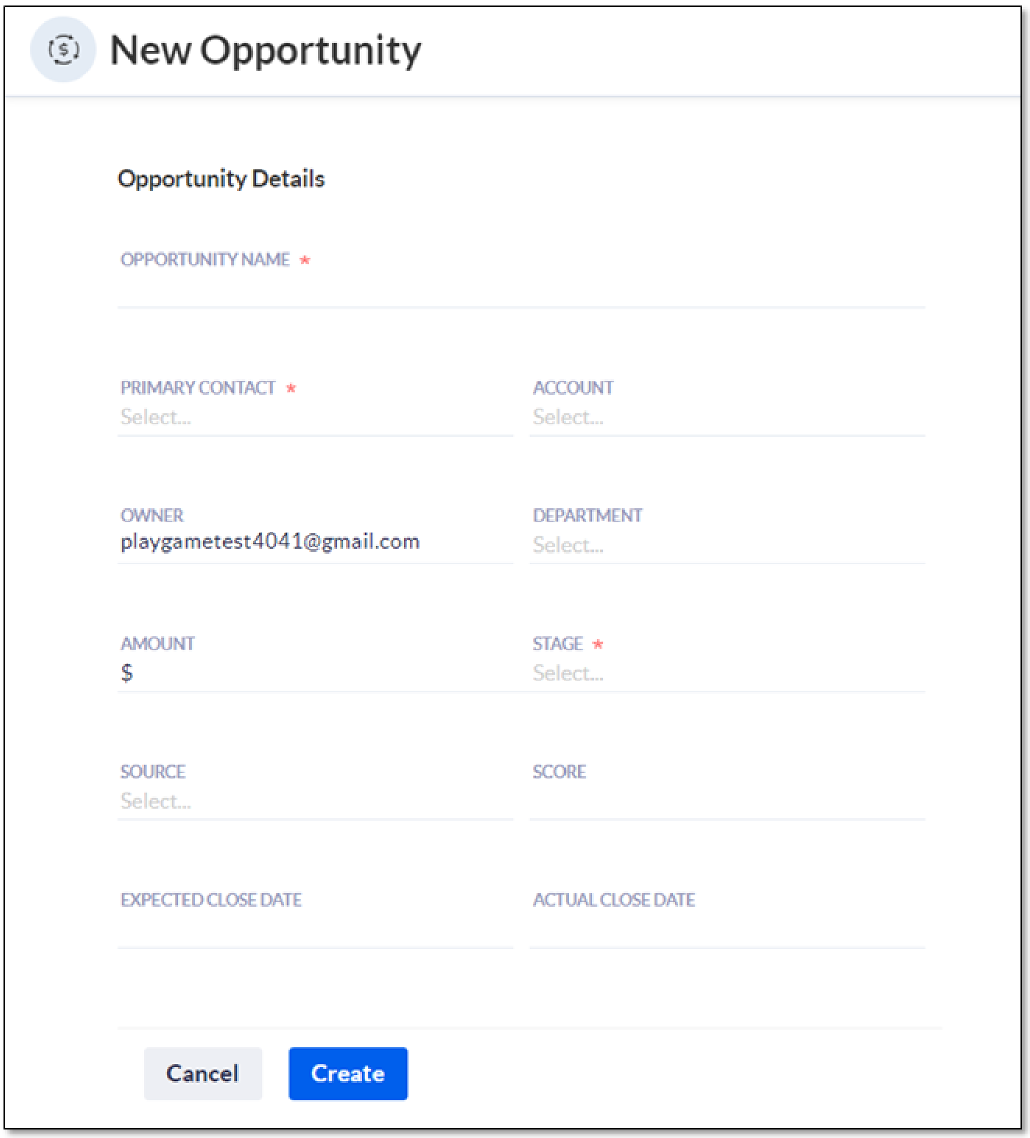
Opportunity Option

2. Complete the **Opportunity Details** section:
    - **Opportunity Name:** The name of the Opportunity (required).
    - **Primary Contact:** The Contact associated with the new Opportunity (required).
    - **Account:** The Account associated with the new Opportunity.
    - **Owner:** The agent who owns the Opportunity.
    - **Department:** The department the Owner is assigned to.
    - **Amount:** The value of the proposed sale.
    - **Stage:** The current phase of the sale (required):
        - **Needs Assessment:** Learning more about the prospect, their business needs, and their pain points with their existing product, and getting details to identify a product package you can provide to them.
        - **Value Presentation:** Demonstrating products and presenting information to show how your product solves the needs identified in the Needs Assessment Stage.

- o **Proposal/Quote:** This stage varies widely from company to company, and may include things like delivering a quote or proposal.
- o **Closed Won/Lost:** As the sales process comes to a close, the sales rep asks the prospect to finalize the deal, which ends in either a win or loss of a sale.

- **Source:** The channel by which the lead was initially presented (Phone, Email, Web, etc.)
- **Expected Close Date:** The expected date to close the sale.
- **Actual Close Date:** The date the sale is closed.

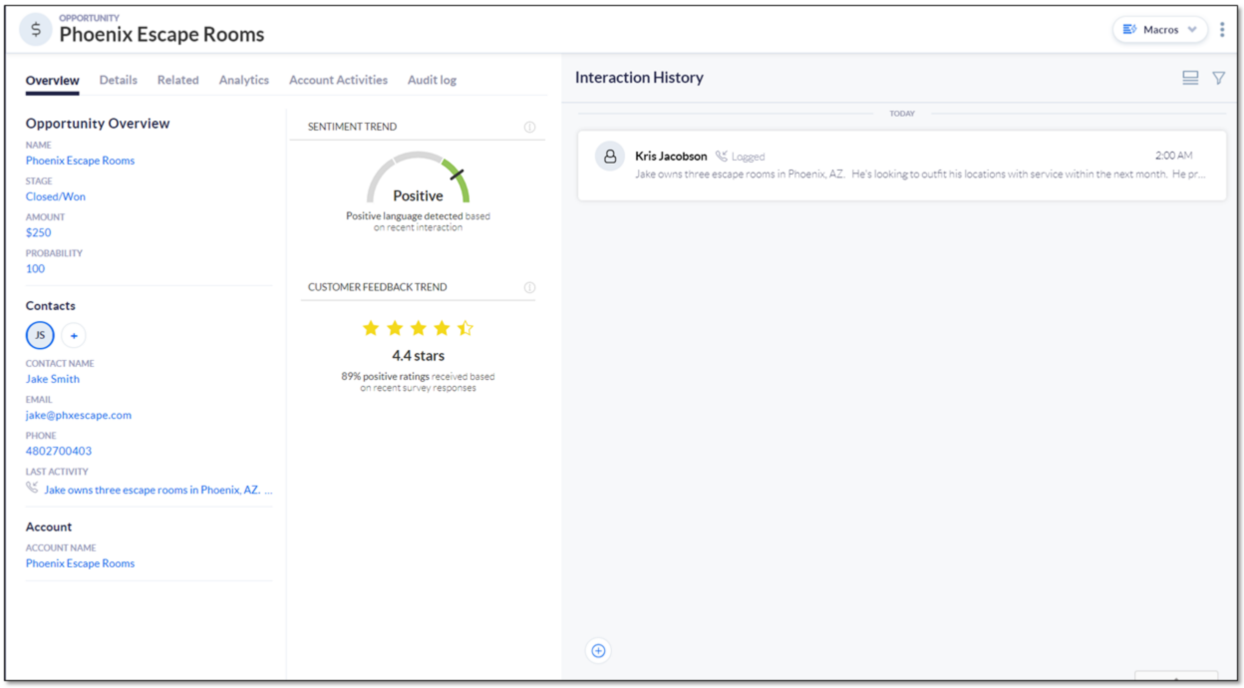
3. Click **Create**.



Opportunity Details

Opportunity Workspace

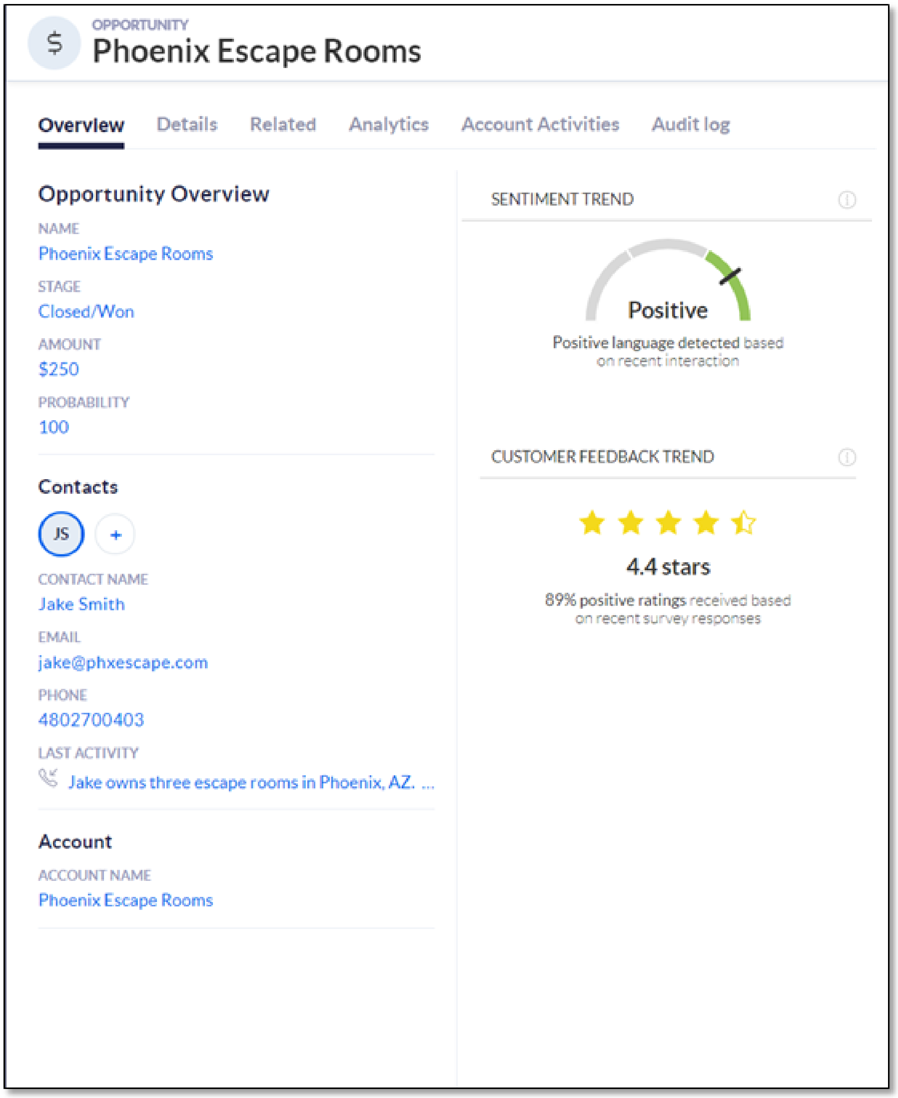
In the **Opportunity** view, search and select an Opportunity to view the **Opportunity Workspace**. The Workspace allows Users to easily view and edit Opportunity details, Relationships, Analytics, Interactions, and more.



Opportunity Workspace

Overview Tab

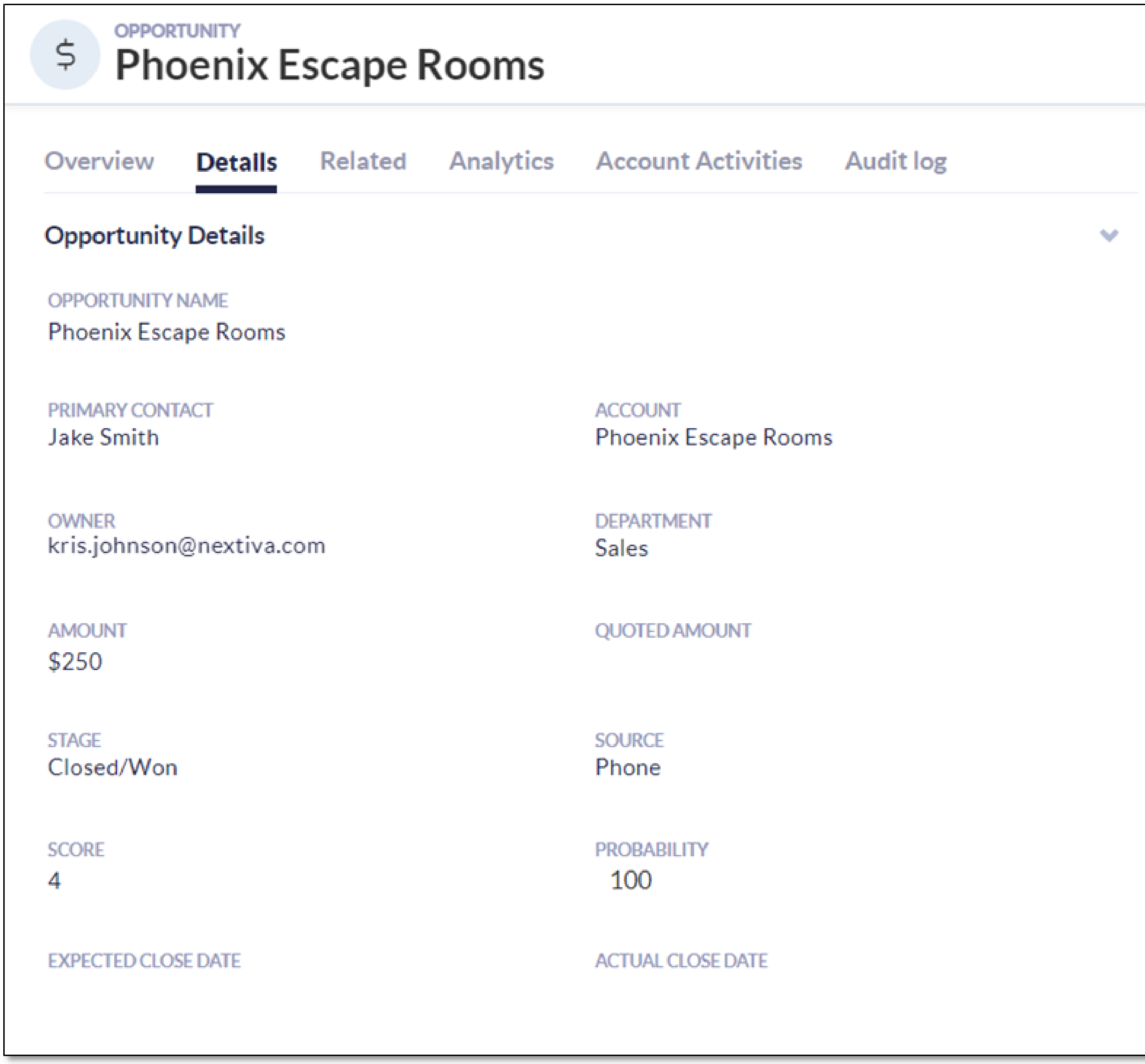
The **Overview** tab displays necessary Opportunity information, such as Contact name, phone numbers(s), email, and shipping and billing addresses. Contacts and Accounts associated with the Opportunity also appear on the Overview tab.



Overview Tab

Details Tab

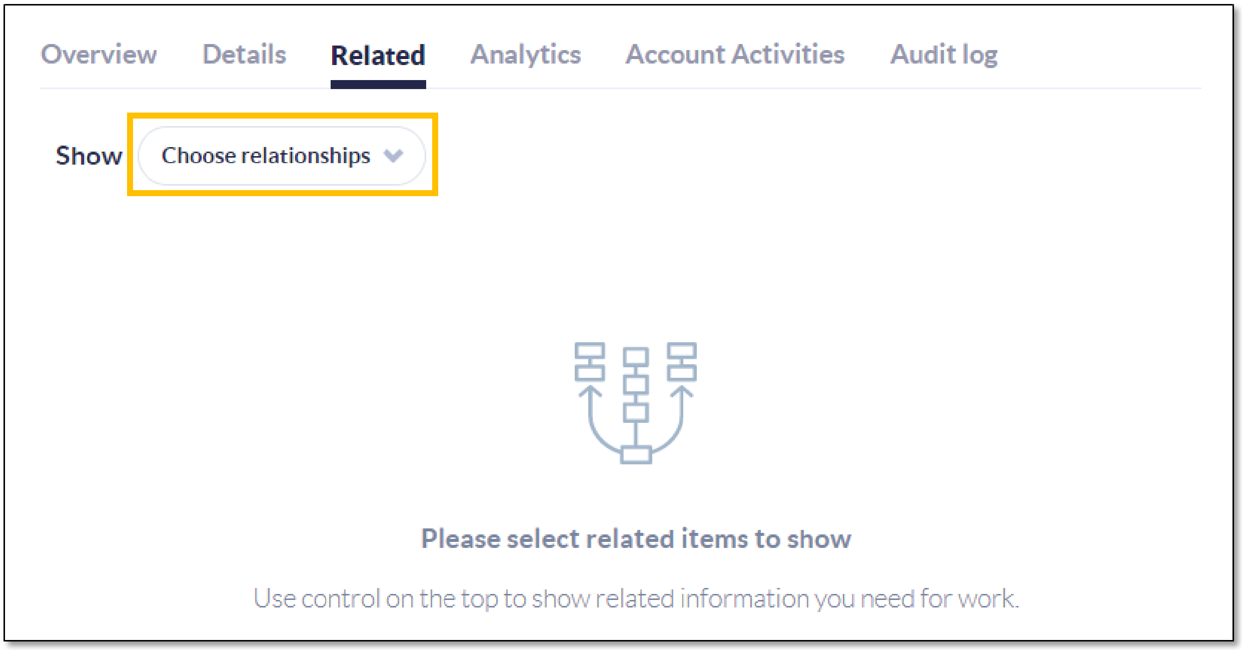
The **Details** tab allows Users to view and edit the Opportunity information, such as the amount, the current stage, and more. Users can also view and edit the Contact and Account associated with the Opportunity.



Details Tab

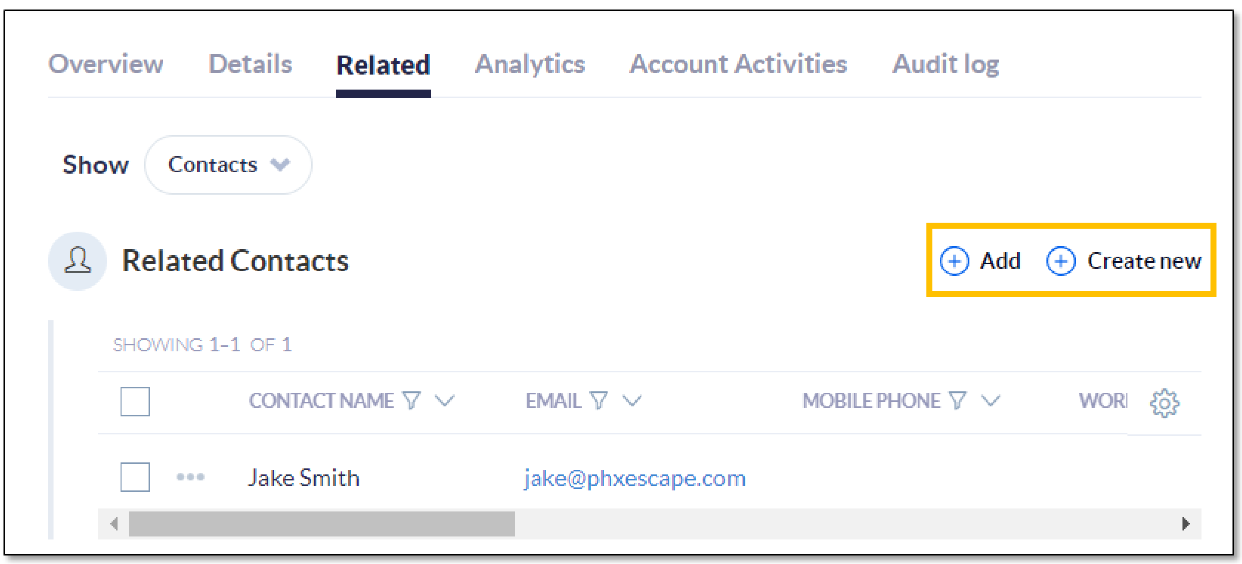
Related Tab

The **Related** tab displays all relationships associated with the Opportunity. Click **Choose relationships** and select the desired record type(s) (**Attachments**, **Contacts**, **Products**) from the drop-down menu.



Related Tab

To associate an existing record, such as an Account, with an Opportunity, hover over the top-right corner above the table and click Add. Click Create new to automatically associate and create a new record type.



Add/Create New Options

Analytics Tab

On the **Analytics** tab, view and quickly reference the Sentiment Trend and Customer Feedback details.

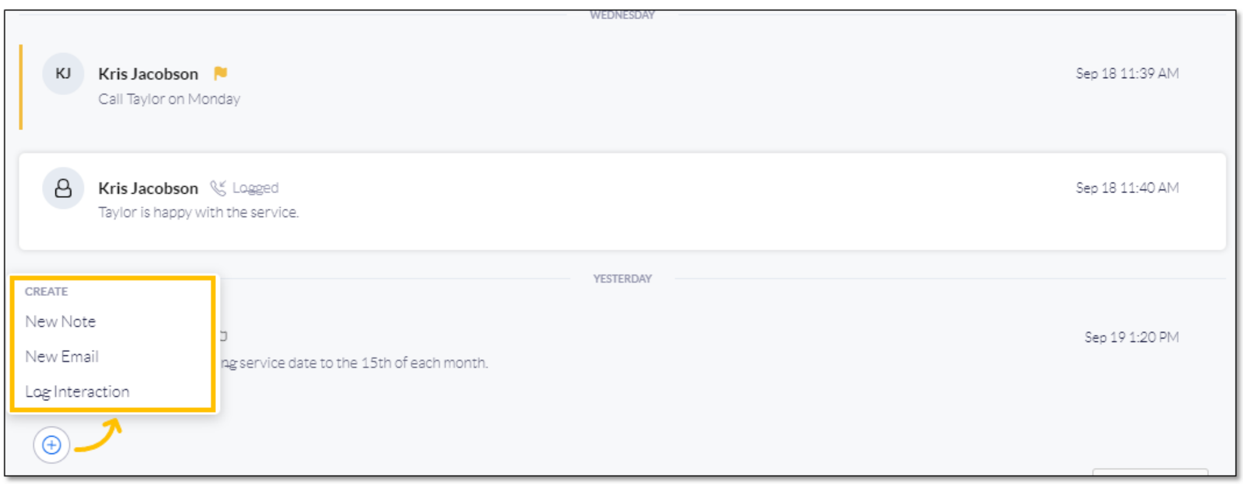
- **Sentiment Trend** works to estimate the most recent customer's disposition. Nextiva CRM calculates this metric by gathering positive and negative keywords in the Account's activities and SmartTopics. This can be customized based on customer needs and industry.
- **Customer Feedback Trend** reports the outcome of any surveys the customer has completed.

Account Activities

If the case is associated with an Account, the **Account Activities** tab will display all Cases related to the Opportunity. Users can sort Cases by last **Created**, **Updated,** or filter only **Unassigned** Cases.

Interaction History

Users can also create a Note, Email, and Log Interactions by clicking the **Plus** (+) icon on the bottom-left corner of the **Interaction History** feed.

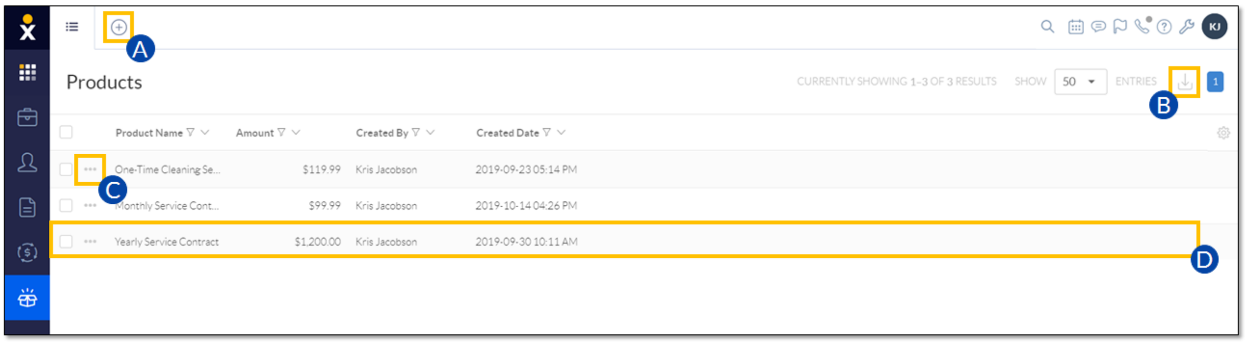


Interaction History Feed

Products

Products represent the goods or services that a company offers. Users can add multiple Products to Nextiva CRM and assign a dollar amount to each Product. Users can then associate Products to an Opportunity, and the Product amounts are added together to display the product total.

Click **Product** from the left-panel to view all Product records in Nextiva CRM.



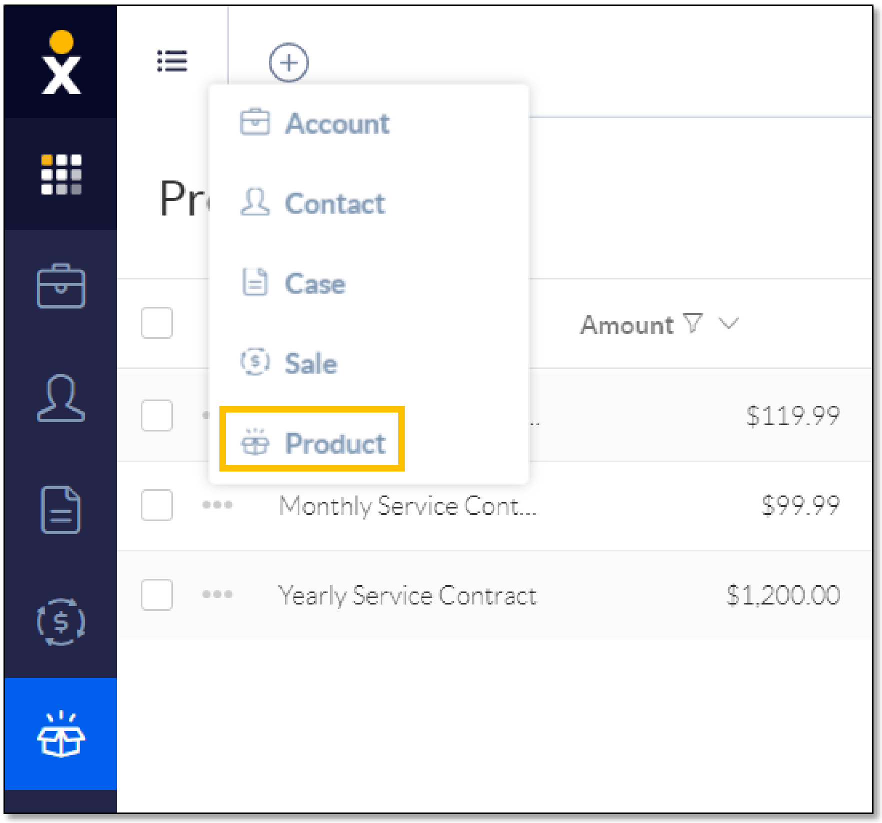
Product View

Users can perform the following actions in Product view:

A. Click the **Plus (+)** icon to add a new record (Account, Contact, Case, Lead, Opportunity, Product, or a custom record type).
B. Select the checkbox(es) corresponding to the desired Product(s) and click the **Export** icon to export the Product data to a **.csv** file.
C. Click the **Ellipsis (...)** icon corresponding to a Product to open a list of contextual actions. Users can use this menu as a shortcut to create system records related to the Product.
D. Click the row corresponding to the Product to view the Product Workspace.

Creating Products

1. Click the **Plus (+)** icon and select **Product.**

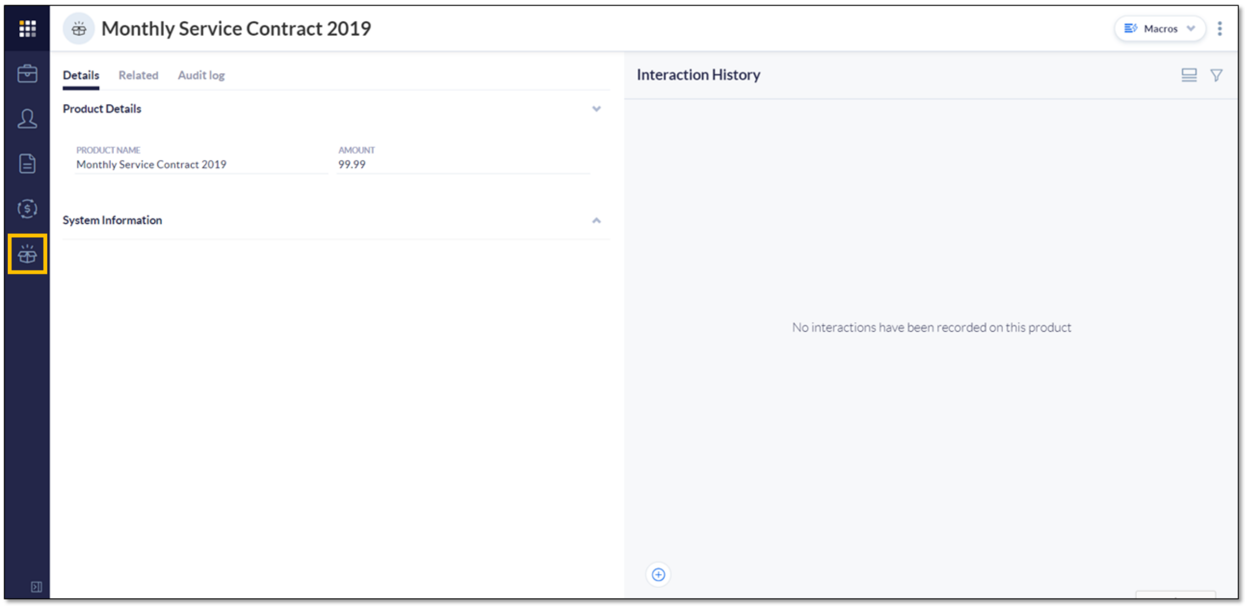


Product Option

2. Enter a **Product Name** and **Amount**. Click **Create**.

Product Workspace

In the **Product** view, search and select a Product to view the **Product Workspace**. The Workspace allows Users to easily view and edit Product details, Relationships, Interactions, and more.



Product Workspace

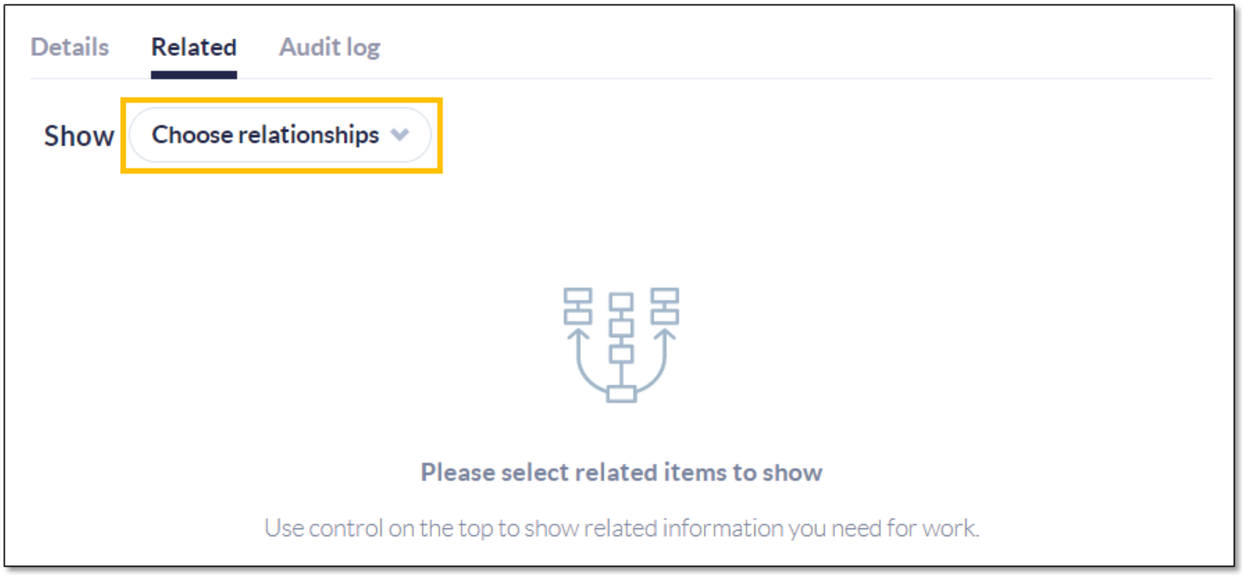
Details Tab

The **Details** tab allows Users to view and edit the Product information, such as the product name and amount.

Details Tab

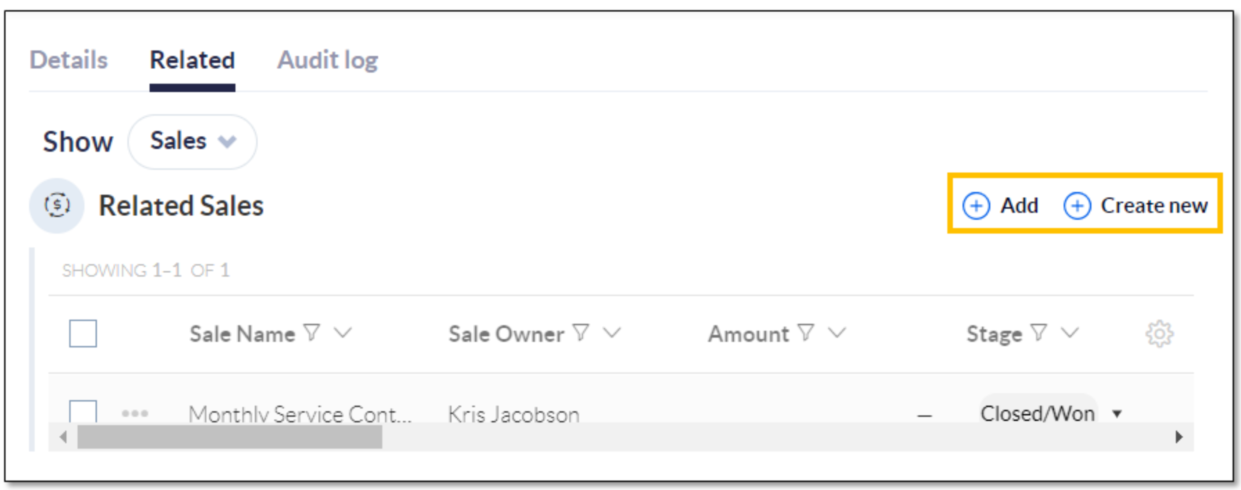
Related Tab

The **Related** tab displays all Opportunities associated with the Product. Click **Choose relationships** and select **Opportunities** from the drop-down menu.



Related Tab

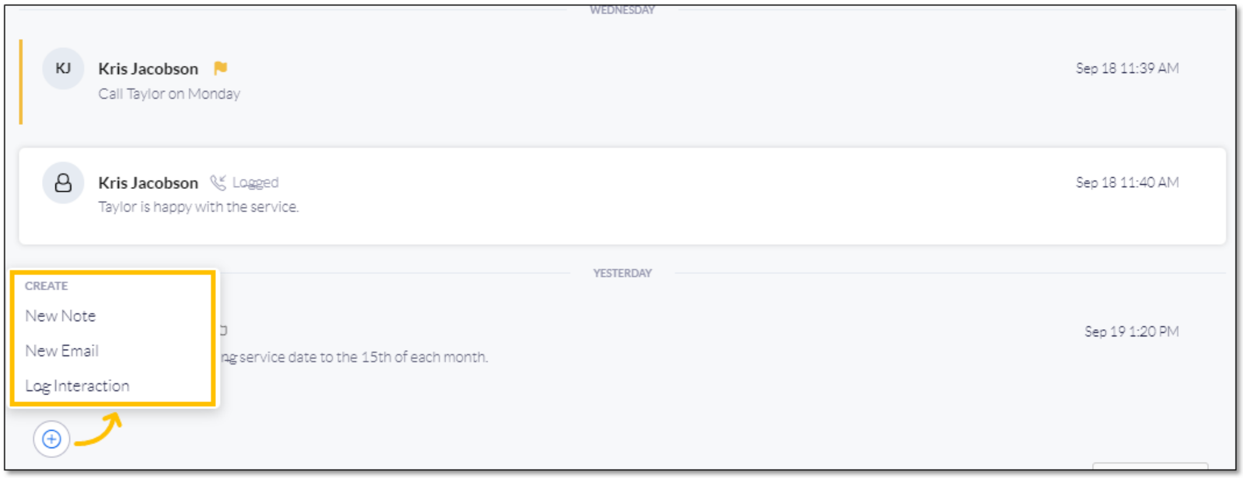
To associate an existing record, such as an Opportunity, with a Product, hover over the top-right corner above the table and click **Add**. Click **Create new** to automatically associate and create a new record type.



Add/Create New Options

Interaction History

Users can also create a Note, Email, and Log Interactions by clicking the **Plus** (+) icon on the bottom-left corner of the **Interaction History** feed.



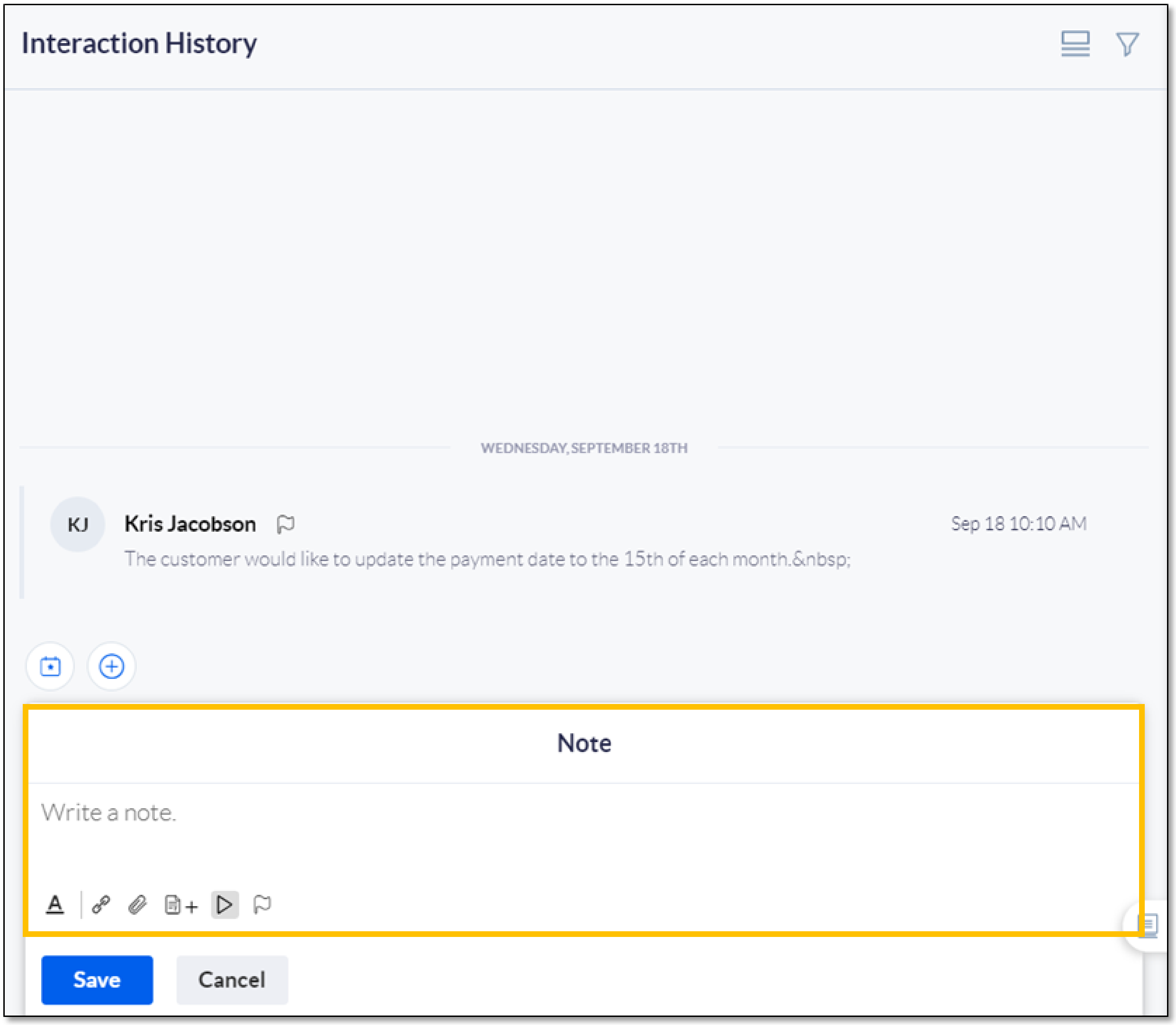
Interaction History Feed

Notes

Notes are brief internal records of information associated with a Nextiva CRM record (i.e. Account, Contact, Case, Lead, Opportunity, Product, and any custom entities). Notes provide information about customer interactions so that other agents who interact with the same customers can view previous interactions. For example, an agent adds a note about a call they received from a customer about an issue for which a case is opened. If other agents work on that case, they can refer to the note about that call.

Adding Notes

Users can add **Notes** associated with any Nextiva CRM Record in the related **Workspace** under the **Interaction History** panel. Users can format the text, insert links, and add [Predefined and Macros](#) when creating Notes.



New Note

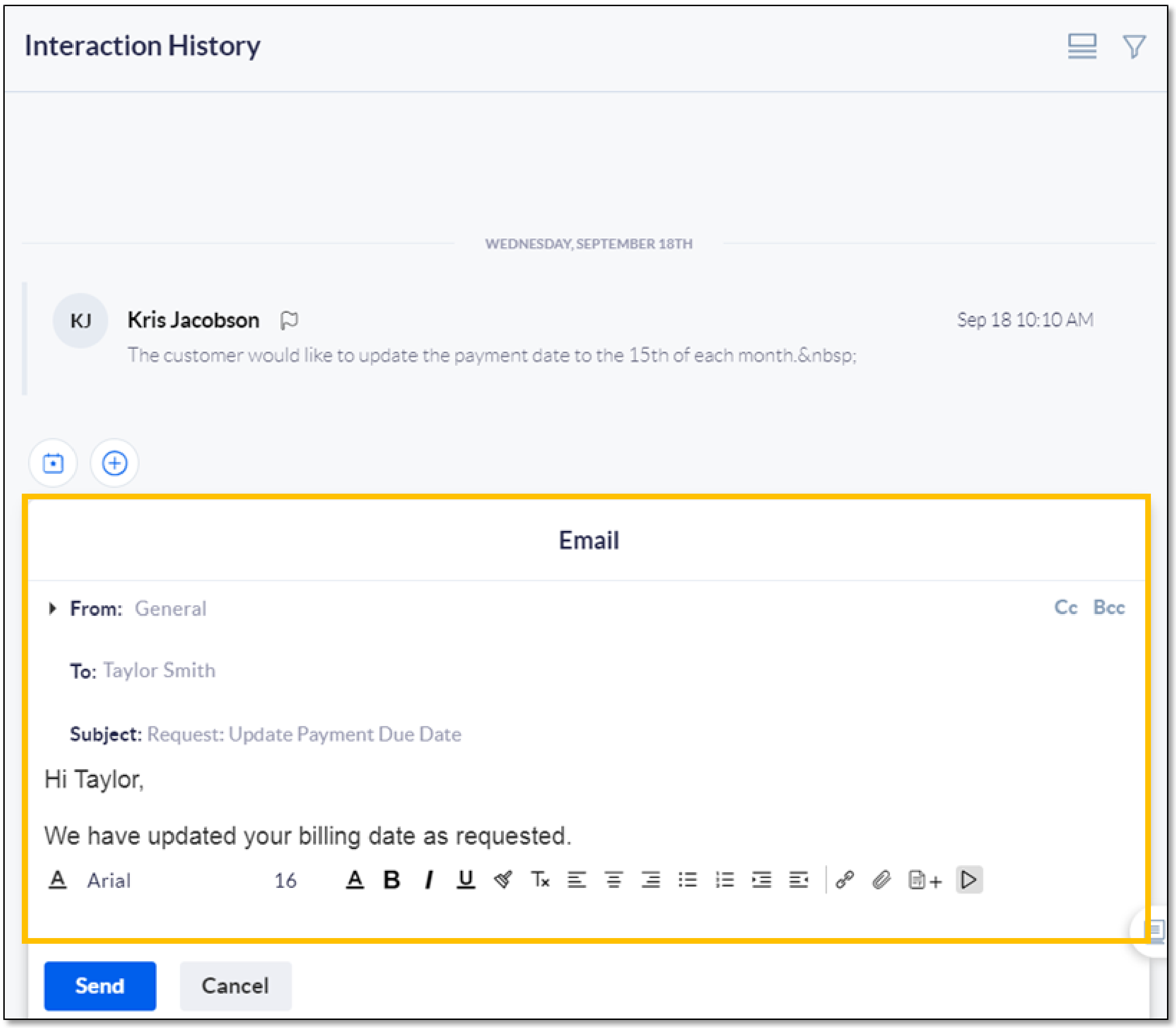
Flagging Notes

Flag Notes to alert anyone who views the Nextiva CRM Record. When an agent flags a Note in an Account, that Note will pop up every time anyone views that Account.

Flag notes by clicking the **Flag** icon while adding or editing a Note.

Interacting via Email

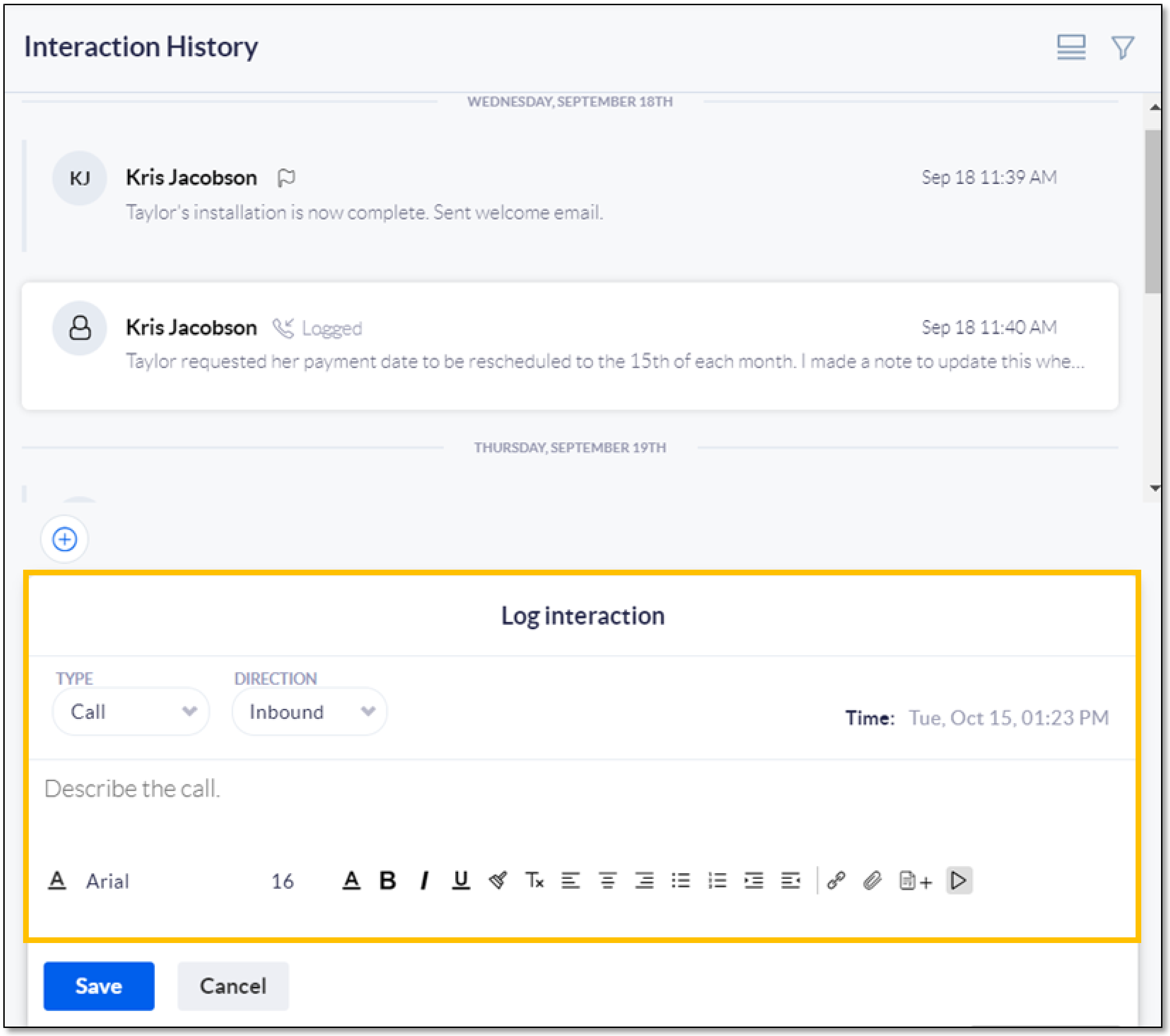
In Nextiva CRM, agents can interact via email from any Nextiva CRM Record in the related Workspace under the Interaction History panel. For example, an agent received an email from a customer about an issue for which a case is opened. Once the Case has been resolved, the Agent can reply to the customer via email informing them the issue has resolved. Users can format the text, insert links, and add Predefined and Macros when sending an email.



New Email

Logging Interactions

In Nextiva CRM, agents can log inbound or outbound calls and emails from any Nextiva CRM Record in the related **Workspace** under the **Interaction History** panel. Users can format the text, insert links, and add [Predefined and Macros] when logging interactions.



Log Interaction

Macros and Predefined Text

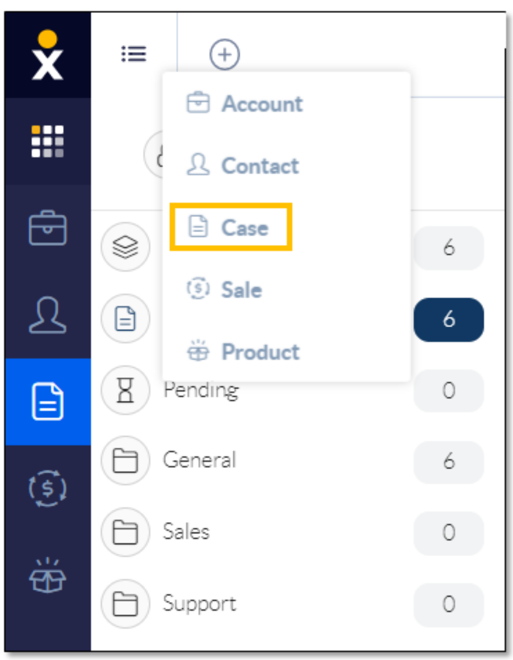
A **Macro** is a single command template used to automatically complete form fields in the Nextiva CRM. Instead of repeatedly typing or selecting the same field values while completing forms, agents can create and apply macros to automate that task. For example, customers may report the same common issue. Rather than manually completing the form for the same issue each time, agents can create a Macro. Agents can then quickly apply the macro to auto-populate the fields in the form.

Predefined Text is saved text that agents can insert while writing in a text editor on a form (e.g. Description, Note, Email). Predefined text is most useful when agents need to write the same message multiple times. For example, rather than creating a new welcome email for each new customer, agents can create predefined text to quickly insert and send when onboarding new customers.

Creating Macros

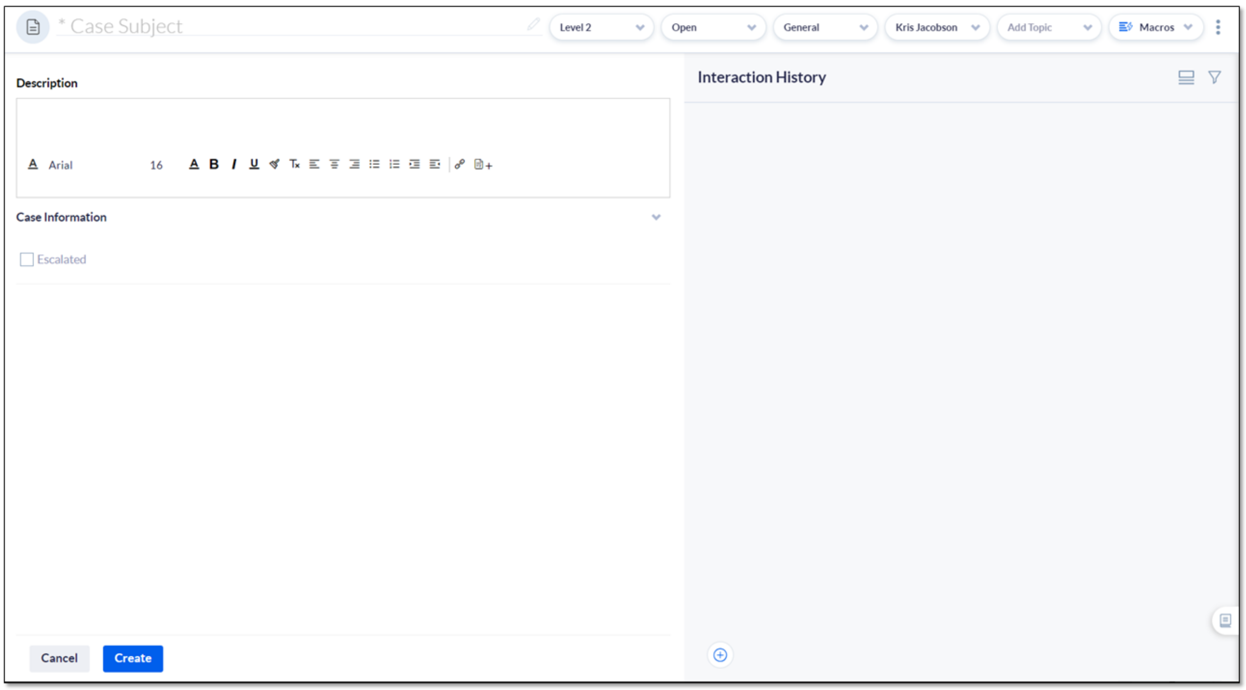
Users can create Macros from the Create Case Form via a Note, Email, or Log Interaction.

1. Click the **Plus (+)** icon and select **Case.**



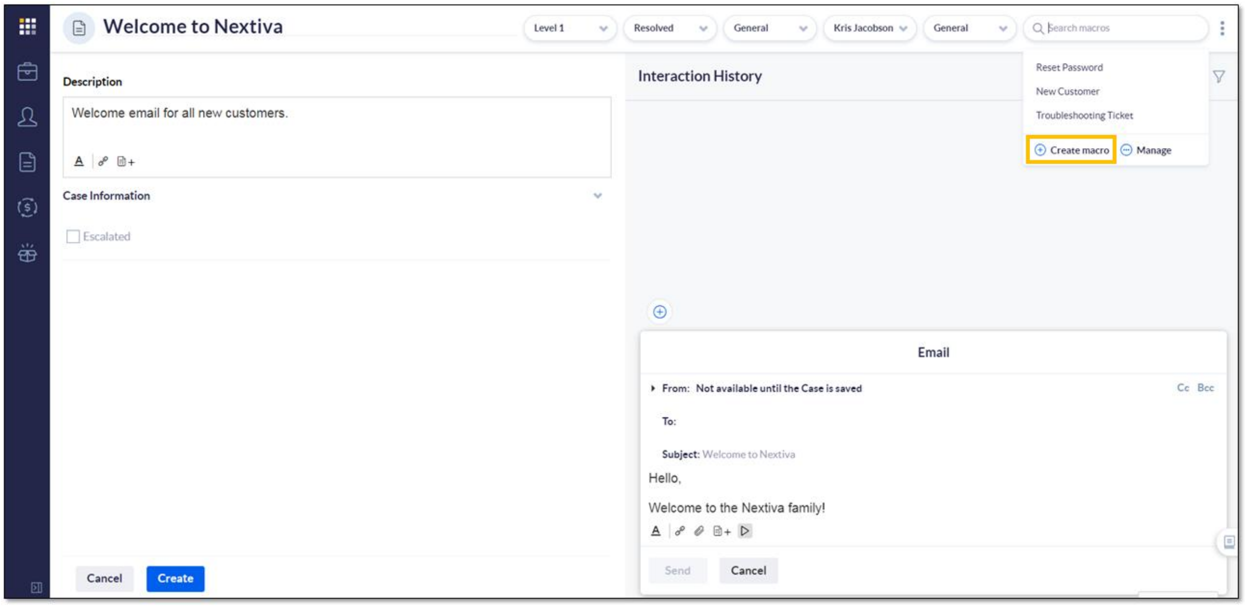
Case Option

2. At the top of the form, enter a **Case Subject** (required).
3. Choose the following parameters from the drop-down lists:
   - **Priority**: The urgency of the Case. The priority defaults to **Urgent**.
   - **Status**: The status of the Case. The status defaults to **Open**.
   - **Department:** The department to which the Case is assigned.
   - **Owner:** The user to which the Case is assigned.
   - **Topic**: The category that best summarizes the Case.
4. In the **Description** section, enter a summary of the Case. Users can format the text, insert links, and add Predefined Text.



New Case Form

5. Create a Note, Email, and Log Interactions by clicking the **Plus** (+) icon on the bottom-left corner of the **Case Interaction** feed.
6. Click **Macros** in the top-right corner and select **Create Macro**.



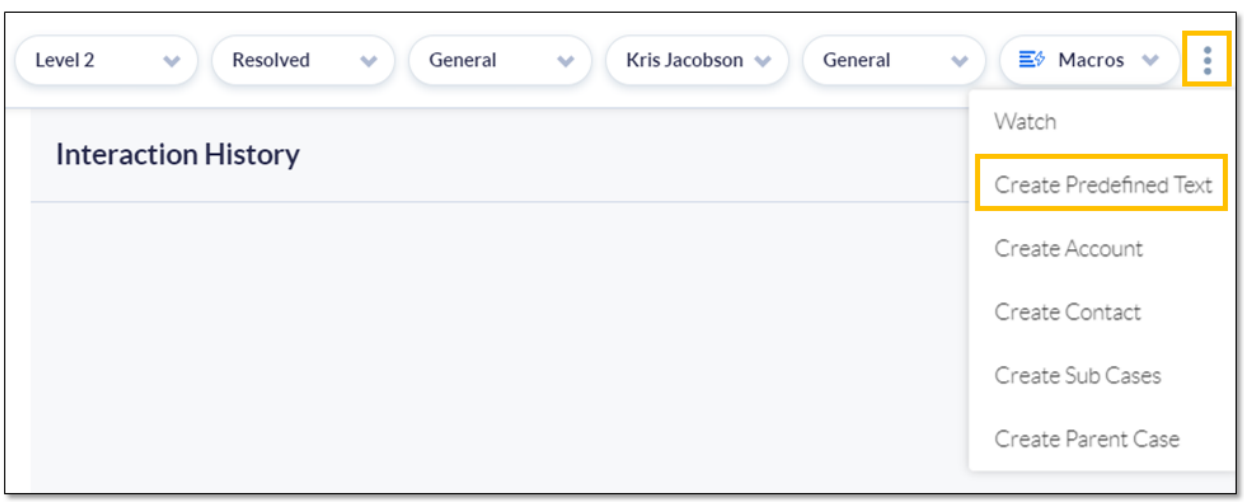
Create Macro

7. In the **Create Macro** window, enter a **Name** and **Description**.
8. Select the availability (**All Agents** or **Only Me**).
   NOTE: The **Available To** drop-down list is only available to Users with permissions.

Creating Predefined Text

Users can create Predefined Text from any Nextiva CRM Record in the related **Workspace** under the **Interaction History** panel.

1. Click the **Ellipsis (...)** icon, select **Create Predefined Text** from the drop-down list.



Create Predefine Text

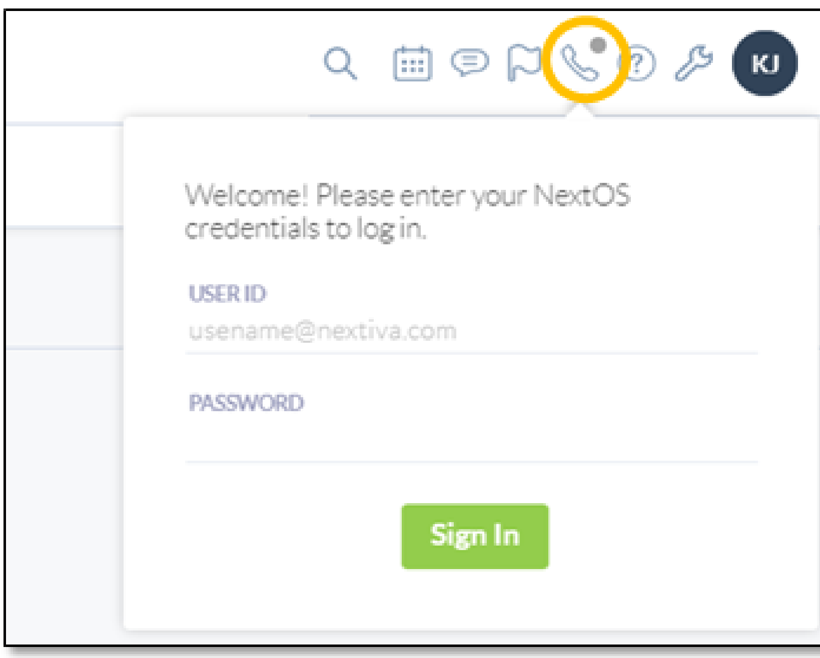
2. In the **Create Predefined Text** window, enter a **Name** and the predefined message.
3. Select the availability (**All Agents** or **Only Me**).
   NOTE: The **Available To** drop-down list is only available to Users with permissions.
4. Click **Create**.

Call Pop

Call Pop notifies Users of incoming calls to their Nextiva phone number and allows them to Answer or send the call to Voicemail directly from Nextiva CRM. Users can also quickly identify and associate callers with any Nextiva CRM records, such as Accounts and Contacts.

Signing In

1. Click the **Phone** icon at the top right corner.
2. Enter the NextOS User login credentials. Click **Sign In**.

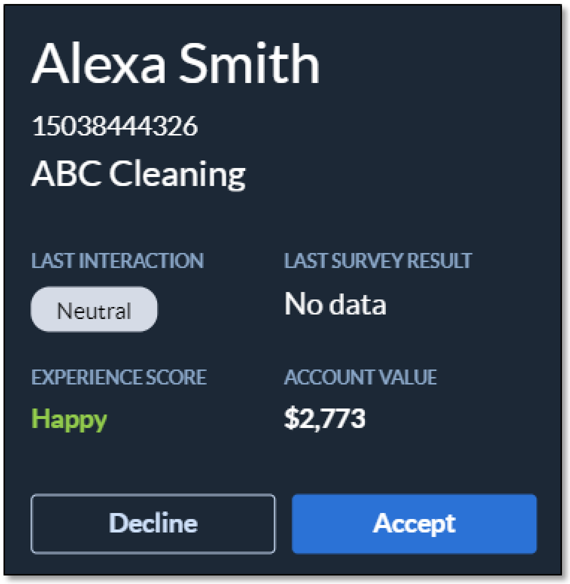


Call Pop Log In

Incoming Calls

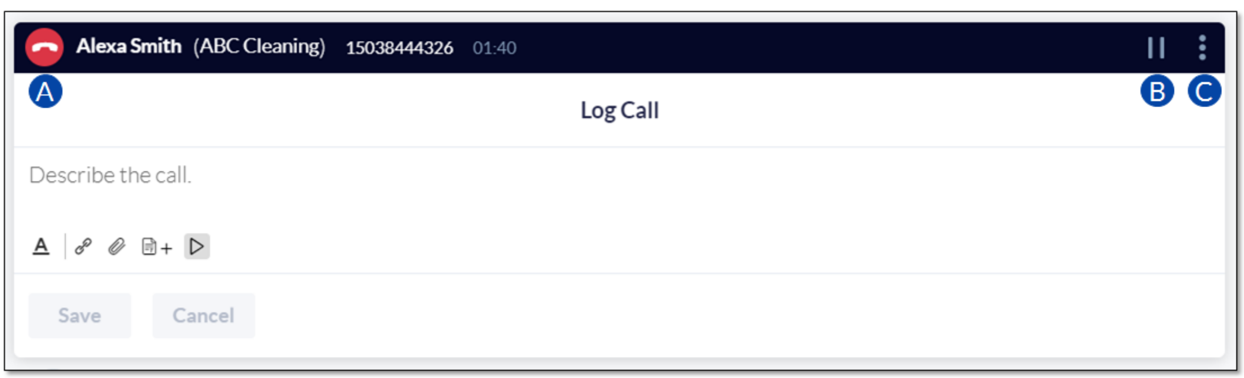
When receiving a call, a pop-up window will display in Nextiva CRM. The Call Pop will display any associated records (Account and Contact), the last interaction, last survey result, experience score, and the account value.

To answer the call, click **Accept**. Otherwise, Users can send the call to Voicemail by clicking **Decline**.



Incoming Call

Once accepted, Users can instantly log the call.

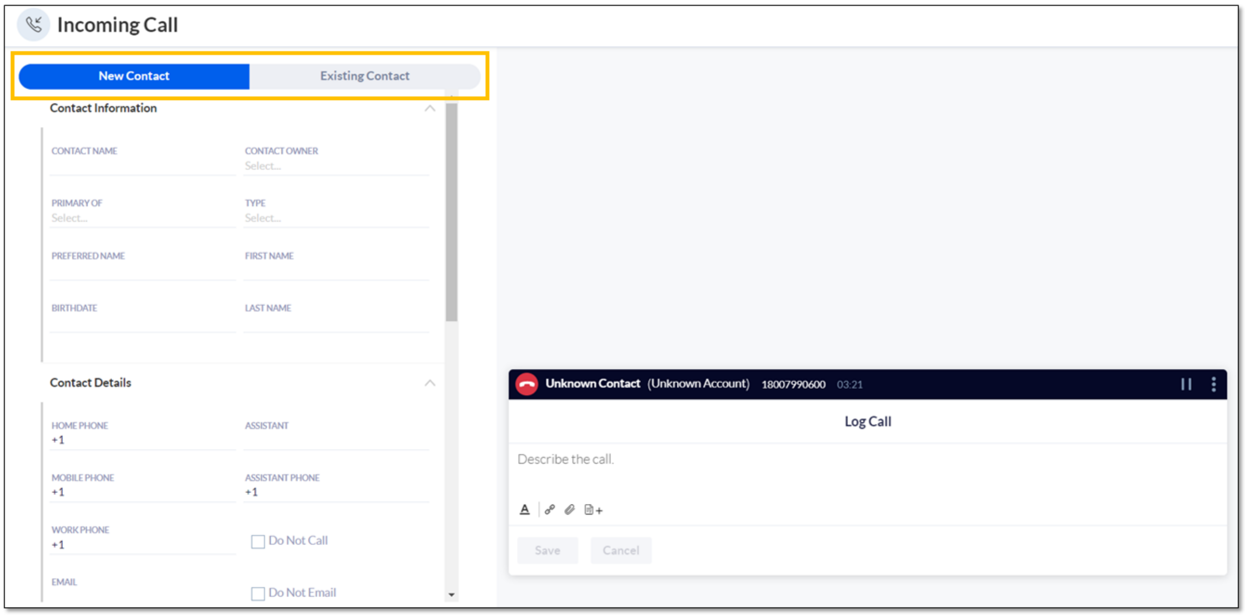


Log Call

A. End call.
B. Place call on hold. To resume, click the **Resume** button.
C. Change the Contact associated with the call. Choose an **Existing Contact** or add **New Contact**.

Associating Unknown Contacts

After answering a call via Call Pop, Users can associate the call with a New Contact or an Existing Contact.

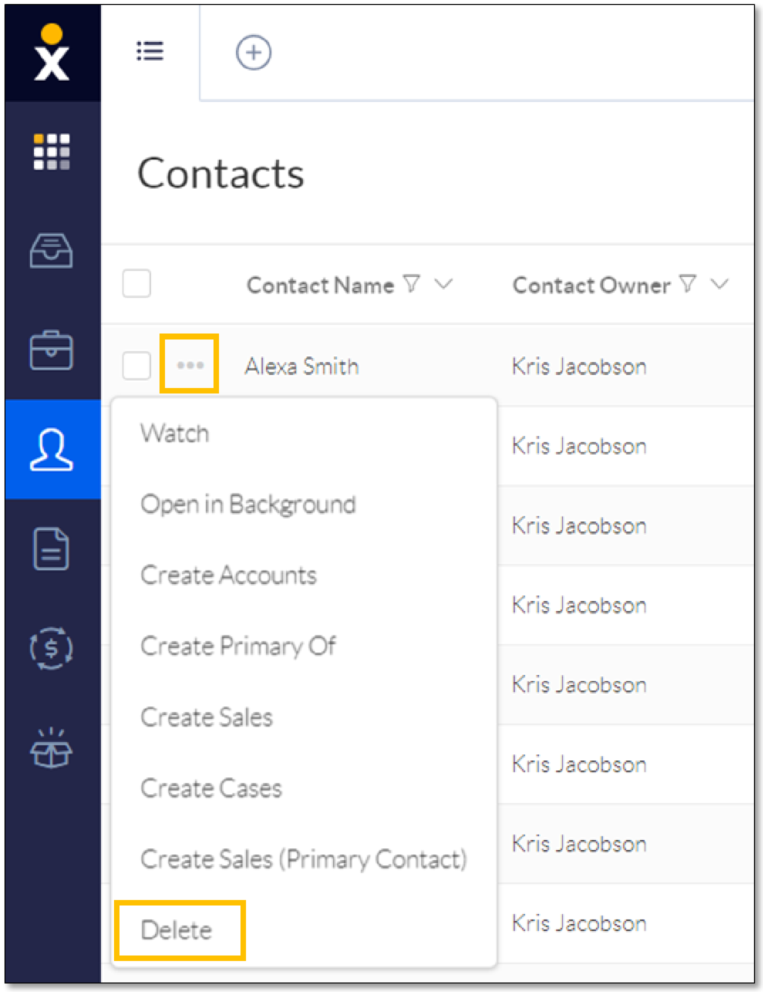


Unassociated Call

Deleting Records

Deleting records (Accounts, Contacts, Cases, Leads, Opportunities, and Products) removes them from being displayed in Nextiva CRM. Only Administrators or Users with proper permissions can delete and restore records. Deleted records are stored in the recycle bin for 60 days, after which they will be automatically deleted from the system. Administrators can restore all deleted records or permanently delete records from the recycle bin. Users who have permission to delete records can only view and restore records they have deleted.

1. Click the ellipses (...) to the left of the desired record and select Delete from the drop-down list.
2. Click Delete to confirm.

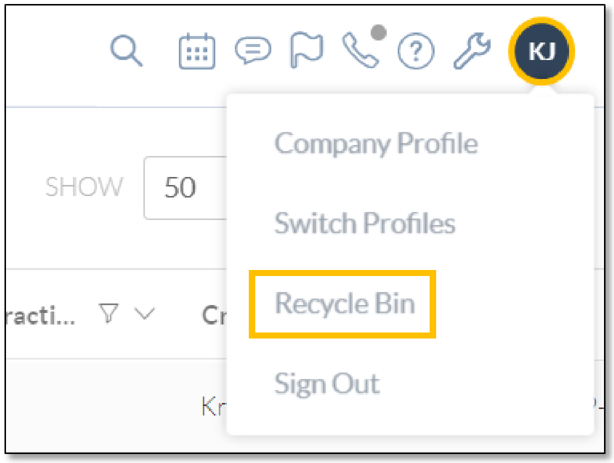


Delete Option

NOTE: To bulk delete, select the checkboxes corresponding to the desired records, and click ellipses (...) > Bulk Delete *(X records)*.

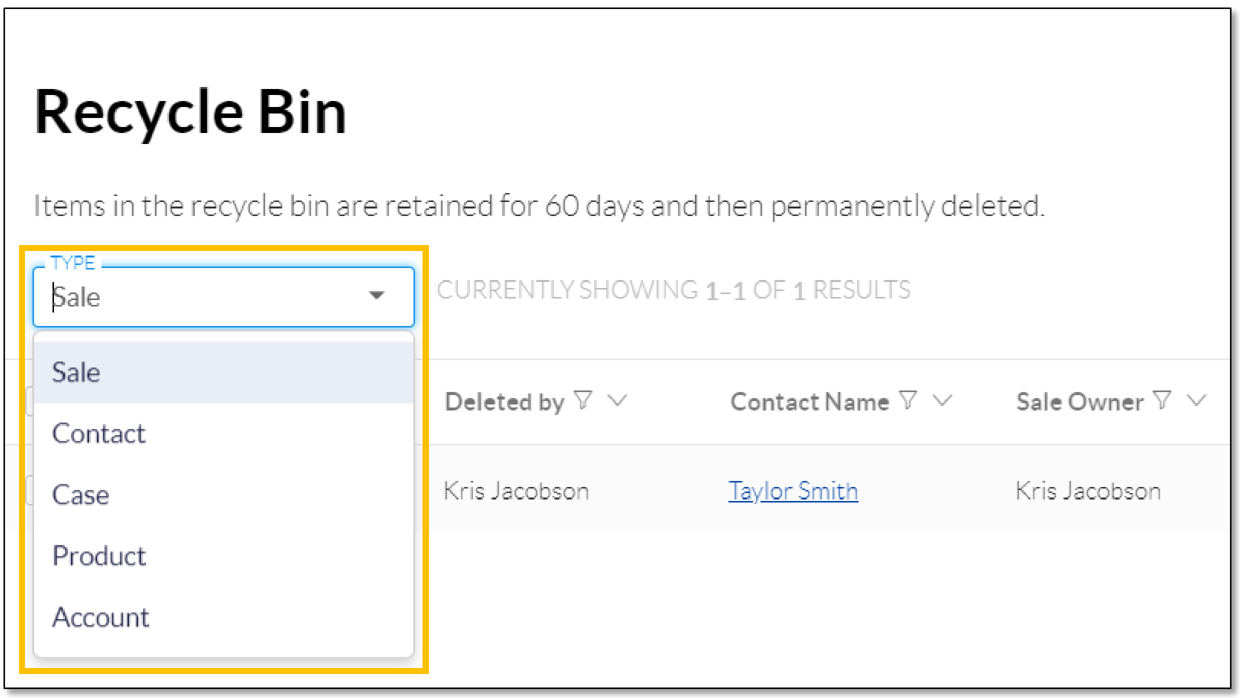
Restoring Records

1. Click the Avatar (or the circle with the Admin's first and last initials) at the top-right corner, then select Recycle Bin.



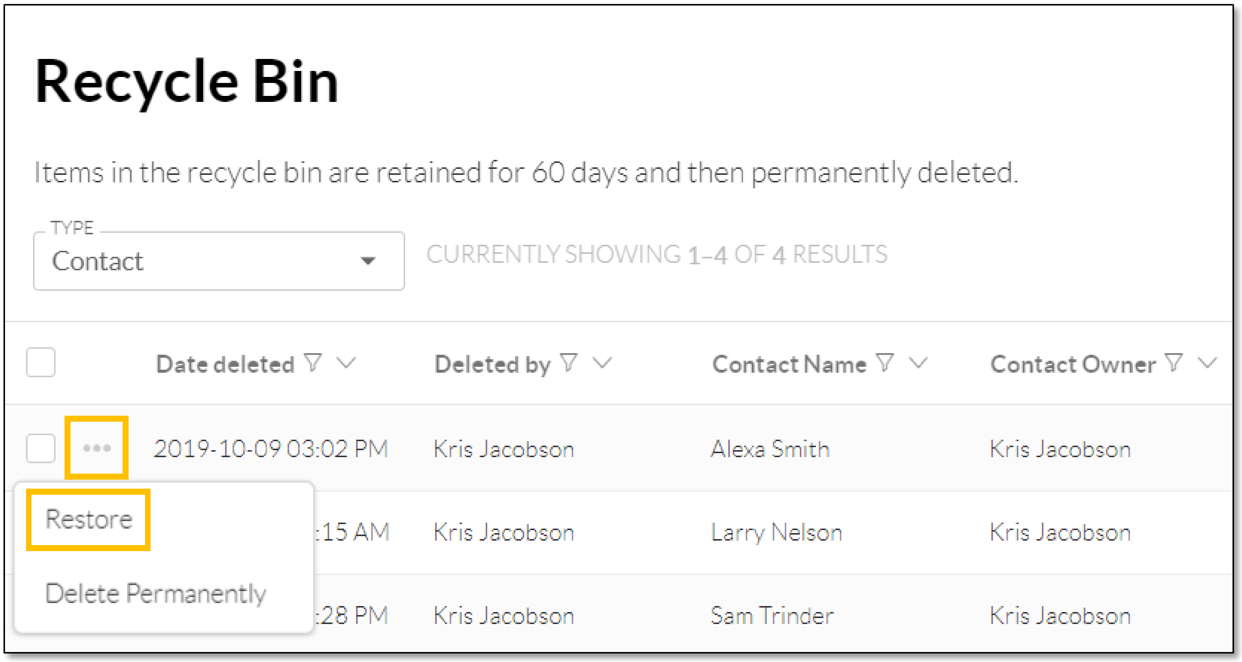
Recycle Bin Option

2. From the **Type** drop-down list, select the desired record type to filter the records.



Recycle Bin Record Type

3. Click the **ellipses (...)** corresponding to the desired record, then select **Restore** from the drop-down list.



Restore Option

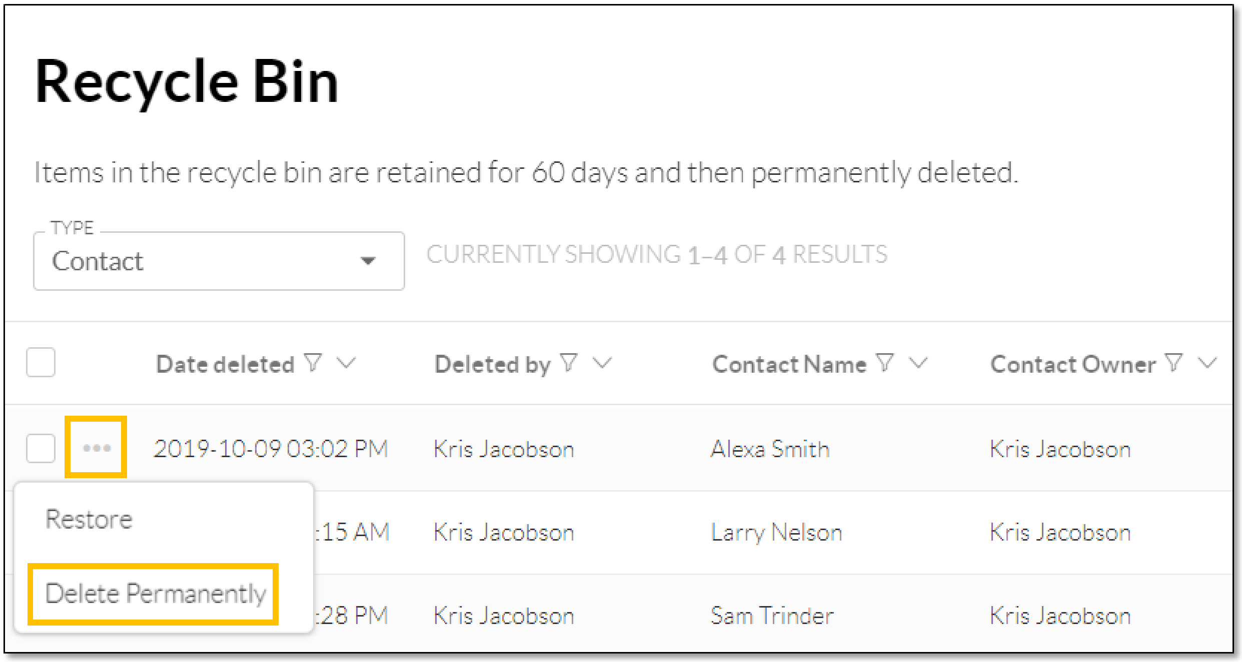
NOTE: To bulk restore, select the checkboxes corresponding to the desired records, and click **ellipses (...)** > **Restore.**

Permanently Deleting Records

1. Click the **Avatar** (or the circle with the Admin's first and last initials) at the top-right corner, then select **Recycle Bin**.

    NOTE: Only Nextiva CRM Administrators can permanently delete records from the recycle bin.

2. From the **Type** drop-down list, select the desired record type to filter the records.
3. Click the **ellipses (...)** corresponding to the desired record, then select **Delete Permanently** from the drop-down list.



Delete Permanently Option

NOTE: To permanently bulk delete records, select the checkboxes corresponding to the desired records, and click **ellipses (...)** > **Delete Permanently** > **Yes.**

For additional assistance, please contact a member of our Amazing Service team by emailing support@nextiva.com to immediately open a case.