



Office Manager Setup Guidebook

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Welcome to Nextiva!

Thank you for choosing Nextiva as your next generation communications provider! You are one step away from using your excellent new phone service.

This guidebook will provide you with detailed, step-by-step instructions on how to setup and select your phone system features. Once you have completed this guidebook, you will be ready to start experiencing all the benefits Nextiva has to offer!


Login to your Office Manager portal by going to <http://www.nextiva.com>, and clicking on the “Customer Login” button located in the upper right hand corner of the Nextiva home page. **Note:** Make sure you login to the Office Manager portal not the Customer/Employee Portal.

1. Company

Note: If this is your first time logging into the Office Manager portal, you will be greeted with this message in a red bold face type: “Welcome to the Office Manager! Before getting started please tell us how you want to set up your phone system.” The following instructions will assist you in setting up your phone system, as well as choose the Nextiva features most compatible/appropriate for your business.

1A. Company Profile

Once you have logged into your account, the “Company Profile” page will be displayed. **If you would like to see a snapshot image of this page, please refer to Figure 1 in the Appendix.**

This page is an overview of the entire phone system including: the total number of extensions you have available, number of extensions being used, number of outside lines you have available, and the number of lines being used. Below this field is an area to create/add your company Site(s). Click on the  symbol and you will be directed to the “Add a Site” page.

- i. **Add a Site:** *If you would like to see a snapshot image of this page, please refer to Figure 2 in the Appendix.*

Please fill in/select settings for the following fields on this page:

- a. **Site Name:** This can be the company’s name or any other name you would like to associate with the new Site.
- b. **Site Description:** A simple description/purpose of the Site. **Note:** *This field is optional.
- c. **Outgoing Phone Number:** This is the number you purchased from Nextiva when you initially signed up. This number will be displayed on the receiving party’s caller ID when placing outbound calls.
- d. **Caller ID:** This is the name that will appear on the receiving party’s caller ID when placing outbound calls (i.e. Nextiva). **Note:** *This field is optional.
- e. **Max Simultaneous External Calls:** The maximum number of outbound calls that can be placed at one time is 1000. If you want to the number to be less than 1000, select the

- “Limit” button and specify the number you want in the blank field.
- f. Time Zone: Select the time zone you are located in from the drop down box. The time zone you select will affect the Business Hours and Holiday Schedules (the Business Hours and Holiday Schedules are explained in more depth under the “1. Company Profile→Business Hours and Holiday Schedules” tab on page 7).
 - g. Language: Select “English” in the drop down list. This also sets the Auto Attendant’s language to English (the Auto Attendant feature is explained in more depth under the “3. Sites→Auto Attendant” tab on page 16).
 - h. Number of extensions allowed: Directly underneath this field, it will show the total number of extensions you purchased from Nextiva and are available to you to assign. If you create more than one Site, you can allocate a specific number of extensions to each Site.
 - i. Site Extension Range: This is the range of numbers every extension for the company, whether it is an employee/regular extension or a reserved extension, must fall between. You can select a range in the 100’s, 1,000’s, or the 10,000’s (i.e. 100-999, 1,000-9,999, 10,000-99,999). *Note: Once you have selected your site extension range you **CAN NOT** go back and change the range.*
 - j. Employee Extension Range: Employee extensions are considered regular extensions. These extensions are purchased through Nextiva. You can call in and out with these extensions; meaning an employee can call out to a customer from his/her employee extension, or the employee can call a co-worker within the company by dialing that co-worker’s employee extension. Once you select the site extension range (i.e. 100-999), you must select a sub-range just for these employee/regular extensions (i.e. 100-499). *Note: Unlike the site extension range, you can go back and re-assign a different range of numbers to the employee/regular extensions within the site extension range.*
 - k. Reserved Extension Range: Reserved extensions are free extensions and do not have to be purchased from Nextiva. These extensions can only be accessed internally and can not be used externally. These extensions are generally assigned to your Auto Attendant, Hunt Group(s), or department voicemails (the Auto Attendant and Hunt Group features are explained in more depth under the “3. Sites→Auto Attendant and Hunt Groups” tab on page 16 and 20). The reserved extension range is generally the

remainder of the extension numbers available in the site extension range after assigning the employee range (i.e. 500-999).

Note: Unlike the site extension range, you can go back and re-assign a different range of numbers to the reserved extensions within the site extension range.

1. Entering your Company's Address: **Very Important:** This is the address the emergency operator will be presented with if the E911 feature is used from any of your phones. From this address, the operator will route your emergency call to the nearest police department in your area; therefore it is crucial that the address is accurate.

Once your settings are complete click, "Save." If you change your mind while creating the new Site simply click, "Cancel" and it will not save any of the settings you were making. Once the Site is created, the new Site name will appear under the "3. Sites" tab in the control panel located on the left hand side of the screen. If you want to finish setting up your new Site right now, please skip forward to the "3. Sites→Your Sites" section on page 9).

1B. All Employees

This page shows every employee in the phone system, his/her assigned external phone number, and his/her personal extension number, and the Site he/she belongs to. *If you would like to see a snapshot image of this page, please refer to Figure 3 in the Appendix.*

You can also edit and delete employees from this page. Click on "Delete" if you want to remove an employee from the list; click on "Edit" if you want to edit his/her profile. *If you would like to see what this page looks like, please refer to Figure 4 in the Appendix. Note: You are UNABLE to create a new employee from this page--this application can be done in the "3. Sites →Employees" tab.*

The following instructions show you how to edit an employee's profile:

Note: The following fields will have the employee's information already filled in, and to edit them simply delete/change the incorrect information and replace it with the new/correct information.

i. Name and Address

- a. First Name: Employee's first name.
- b. Middle Name: Employee's middle name.
- c. Last Name: Employee's last name.
- d. Site: If you have created more than one Site, you can select which Site the employee belongs to. Your Site name(s) will appear in the drop down list. Select the appropriate Site for the employee you are editing.
- e. Include in Company Directory: This is a semi-automated feature. It is an Auto Attendant add-on feature (the Auto Attendant feature is explained in more depth under the "3. Sites→Auto Attendant" tab on page 16). If you have

multiple employees with different employee/regular extensions, you can include a company directory in your Auto Attendant menu. Each individual employee records his/her name from his/her phone, and the company directory will match the employee's name with his/her proper extension from the Auto Attendant menu. Thus, a customer can listen to the directory when he/she calls your company; select the employee he/she wants to speak with, and be transferred directly to the selected employee without being transferred internally by another employee.

- f. Email: The employee's work email address
- g. Address: This address can not be changed in this screen, because it is a company wide feature. If the address needs to be changed, it can be accessed through the individual's employee portal. *Note: The only way the employee can have a different address from the company is if the employee has an outside line assigned to him/her.*
- h. Time Zone: Select the time zone the employee is located in from the drop down list.

ii. Phone System

- a. Outside Line: *Note: *This feature is optional for individual employees.* If your company operates in one location, then an outside line per employee is unnecessary; unless you want the employee to have a direct outside line. With an outside line, the employee has the option of setting his/her own emergency address. *Note: This is very important if the employee is working out of a building that is not located where the headquarter building is.* These outside lines can be purchased from Nextiva.
- b. Internal Extension: This is the employee's employee/regular extension. Click on the "Next Available" button and the next available extension number from your employee/regular extension range will automatically appear in the field to the left. These extensions can be used to call in and out.
- c. Voicemail PIN: This is the 4-digit PIN Number that grants the employee access to his/her personal voicemail box. Every employee can access his/her personal voicemail box by dialing *86 from his/her phone. For simplicity, just leave this PIN Number as a default "1234," and the employee can change it when he/she is setting up his/her account through the employee portal. *Note: More detailed instructions on how to setup individual employee voicemail boxes will be in the Employee Portal Guidebook.*

- d. Voicemail System Language: Select “English” from the drop down list.

iii. Technical Phone Information

- a. MAC Address: The MAC Address functions as the physical phone’s identification number. If you make any changes to the phone’s settings through the office manager portal, the changes will automatically be transferred to the phone. **Note: Changes to settings can only be made from the office manager portal, not the individual employee portal.** If you purchase your phone(s) through Nextiva, the MAC Address will automatically import into your office manager portal, and you can select the proper MAC Address from the drop down list. If you are using your own device(s), it needs to be configured by a Nextiva staff member first. This ensures the device(s) are compatible with our phone system and software. If the device(s) are compatible with our system and Nextiva is able to support the device(s), then the MAC Address will be manually input in your office manager portal by a Nextiva staff member. If you are planning to use your own device(s), please call Nextiva at 1-800-983-4289 to see if the device(s) can be configured before attempting to setup your account. **Note: The MAC Address can be located number back or bottom of the phone, and it is usually 10-12 characters long.**



- b. Device Line Number: This feature varies depending on the phone you are using, because different phones have different line capacities. Once the MAC Address is selected, the number of lines available will be displayed in the drop down box. Select which line you want the device connected to.
- c. Authentication Name: This is considered the phone’s username. If you purchased your phone(s) through Nextiva, the name will automatically appear in the field to the right once the MAC Address is selected. This name needs to be entered or the phone system will not recognize the phone.

- d. Authentication Key: This is considered the phone's password. Like the authentication name, if you purchase your phone(s) through Nextiva, the key will automatically appear in the field once the MAC Address is selected. This key needs to be entered or the phone system will not recognize the phone.
- e. Phone Model: Select the correct phone model from the drop down list (i.e. SPA962).

iv. Phone System Portal

- a. Portal Username: The phone's non-character and more easily identifiable name.
- b. Portal Password: Enter the password you want to access the phone portal.
- c. Confirm Password: Re-enter the new password.
- d. Portal Language: Select "English" from the drop down list.

Once your settings are complete click, "Save." If you change your mind while editing the employee's information simply click, "Cancel" and it will not save any of the settings you were making.

1C. Business Hours

This is your company's hours of operations. Click on, "Create a New Business Hours Schedule." *If you would like to see a snapshot image of this page, please refer to Figure 5 in the Appendix.* You have the ability to create more than one schedule to accommodate for holidays and other special occasions. In addition, you can make different schedules available to different company Sites'.

Once your Business Hour schedule is complete click, "Save Changes." If you change your mind while creating the schedule simply click, "Cancel" and it will not save any of the settings you were making.

1D. Holiday Schedules

This is your company's Holiday Schedule. Click on, "Create a New Holiday Schedule." *If you would like to see a snapshot image of this page, please refer to Figure 6 in the Appendix.* This allows you to specify the Holiday's title (i.e. New Year's, Christmas) and what day the holiday falls on during the year.

Once your Holiday schedule is complete click, "Save Changes." If you change your mind while creating the schedule simply click, "Cancel" and it will not save any of the settings you were making.

1E. Order Status

This page tracks the location of any package(s) the company has ordered and is supposed to receive. *If you would like to see a snapshot image of this page, please refer to Figure 7 in the Appendix.*

The "Product Fulfillment" field shows the status of the order. It specifies if the order has been ordered, processed, shipped, or received.

The “Phone Number Ports” field shows the status of a number that is being ported from the previous carrier (i.e. AT&T). The only time a number is ported is if you request to keep your existing number, instead of purchasing a new number from Nextiva. The process of porting a number can be a lengthy process. First, Nextiva needs to receive written authorization from you to request a transfer of ownership for your existing number from your previous carrier. Second, Nextiva will send your previous carrier a request to transfer ownership of the number to Nextiva. The request and actual transfer of ownership will take 30 days or more, assuming every piece of information was submitted correctly. This section on this page, will let you know if the authorization is successful, pending, awaiting verification, or rejected. **Note:** The “Product Fulfillment” and “Phone Number Port” sections are for viewing only and the information **CAN NOT** be changed.

1F. New Order

This page allows you to purchase additional phones, adapters, devices, and add-on features. *If you would like to see a snapshot image of this page, please refer to Figure 8 in the Appendix.* If you want to place an order, simply enter the quantity of the product or service you would like purchase, and the price total will automatically calculate at the bottom of the page. Once you have completed your order click, “Continue” and it will prompt you to enter your credit card information. You can use a credit card that is already on file (this information can be found/entered under the “2. Credit Account→Manage Credit Card” tab), or you can add a new card. If you place an order you can keep track of its status under the “1. Company→Order Status” tab.

2. Credit Account

2A. Billing History

The “Billing History” page shows you a detailed list of every phone call and credit charged to your account in a specific month. *If you would like to see a snapshot image of this page, please refer to Figure 9 in the Appendix.* You can select a specific month in the drop down box located at the top of the page. Each day of the month has a separate field and all the transactions that occurred for that day are delineated below the date. The billing history can show all the calls and credits incurred during the month, or only the credits. The transactions can be sorted by reference number or employee name. The month’s billing history can also be downloaded to an Excel file for recording purposes.

2B. Manage Credit Card

This is where the company’s credit card information is stored. *If you would like to see a snapshot image of this page, please refer to Figure 10 in the Appendix.*

You can store more than one credit card’s information by clicking, “Add New Credit Card.” Enter the new credit card’s information in the specified fields and click, “Save.” If you change your mind while entering the new credit card information simply click, “Cancel” and it will not save any of the settings you were making.

2C. One Time Charge

This page allows you to make a one time payment on your account. This feature is useful when you are approaching your credit limit for the month and would like pay off a portion of the balance. You can find your credit limit and the amount used for the month under the “4. Vital Statistics” tab located in the control panel. *If you would like to see a snapshot image of this page, please refer to Figure 11 in the Appendix.*

Note: If you use this feature make sure you have selected the right payment amount before submitting, because once you click, “Submit” the charge CAN NOT be reversed.

3. Sites

3A. Your “Site(s)”

After you create a Site in the “1. Company→Company Profile” tab, the Site name will appear under this tab. When you click on the Site you want to setup, an extended menu will appear underneath the Site’s name. *If you would like to see a snapshot image of this page, please refer to Figure 12 in the Appendix.*

Once the Site is selected, a general overview of the Site’s settings will appear on the page. These are the settings you specified the first time you accessed your Office Manager portal. This page also shows you the number of new, saved, and recent voicemail messages for the Site. The “Site Details” and “Site Extensions” sections can both be edited from this page by clicking, “Edit” (located to the right of each heading).

- i. **Voicemail:** *Note: This is considered your company voicemail (Department voicemail boxes—i.e. Sales, Billing, Customer Service—and individual employee voicemail boxes will be explained in more depth under the “3. Sites →Extension Manager” tab on page 15) and is the only voicemail that can be linked to the Auto Attendant feature.* When you click on this tab a list of all your voicemail records will appear on the screen. It will show when the voicemail message was left, who it was left by, what number the person called from, and the status of the message (i.e. new, unread, read). To select or change your Site voicemail settings click, “Change Settings.” *If you would like to see a snapshot image of this page, please refer to Figure 13 in the Appendix.*
 - a. Enabling or Disabling Voicemail
Option 1: Enable voicemail or
Option 2: Disable voicemail.
Note: If you choose Option 2, you do not have to complete any other sections on this page. Click, “Save Settings.”
 - b. Email notification
Option 1: Receive an email message with every new message you receive or
Option 2: Only receive an email when the message has been marked as urgent or

Option 3: Not receiving email notification for any messages.

***Note:** If you select either Option 1 or 2, you need to enter the email address you want the notification sent to. Directly underneath your email address you can check the box, “Email the voicemail message as an attachment with the message notification.” This feature attaches an 8 or 16 kbps wave (.wav) file to the email notice, and once it is downloaded you can listen to the actual voicemail over your desktop speakers.*

c. Voicemail PIN Number

***Note:** Even though you create the PIN Number in the Office Manager portal, you have to change it to the PIN Number you created here the first time you access the voicemail box, because it is set to a default 1234 (i.e. Company, department, or employee voicemail box from your phone). This is the 4-digit PIN Number that grants you access to the company voicemail box. **Note:** The only way to access this voicemail box is by dialing the reserved extension number you assign to it in the Extension Manager (the Extension Manager feature will be explained in more depth under the “3. Sites →Extension Manager” tab on page 15).*

d. Selecting an Outgoing message

This is the voicemail message a customer will hear when he/she calls your company and it is closed, you do not have your company’s phone number forwarded to your cell phone through the Auto Attendant→Receptionist feature, or he/she does not select an option from the Auto Attendant menu.

***Note:** The Auto Attendant and Receptionist features will be explained in more depth under the “3. Sites →Auto Attendant” tab on page 16.*

Option 1: An automated recording of just the company’s phone number or

Option 2: A recorded personal greeting with only the company’s name or

Option 3: A recorded personal greeting with the company’s name, as well as a personal message or

Option 4: An alternate recorded personal message.

***Note:** There are 2 ways to record a personal message for your company voicemail box. When you are setting up department voicemail boxes (i.e. Sales, Billing, or Customer Service) or individual employee voicemail boxes you can only record a message through the phone—the messages **CAN NOT** be uploaded in the Office Manager portal.*

Option 1: Recording the personal message via a computer.

Note: Majority of computers have voice recording software you can use to record your message.

1. Open your voice recording program on your computer
2. Record your personal message in the computer's voice recording program via a computer microphone.
3. The computer will save your message as an 8 or 16 kbps wave (.wav) file.
4. Save the message to your desktop or in a folder of your choice.
5. Through the Nextiva office manager portal go to the "3. Sites→Voicemail" tab.
6. Click, "Change Settings."
7. Select which outgoing message option you want to use.
8. Click on the "Browse" button next to the option you selected.
9. Locate the 8 or 16 kbps wave (.wav) file on your computer.
10. Double click on the wave (.wav→the file must be an 8 or 16 kbps file) file you want to upload as your message.
11. After uploading the file click, "Save Settings."

Option 2: Recording the personal message through your phone.

1. Pick up the phone and dial the reserved extension number you assigned to your company voicemail box through the Extension Manager.
Note: The Extension Manager feature will be explained in more depth under the "3. Sites →Extension Manager" tab on page 15.
2. Enter the voicemail PIN Number you created above.
3. Follow the automated menu and select the type of personal message you want to record.
4. Record your message.
5. When you are satisfied with the message, save it.
6. The recording will automatically upload into the field next to the outgoing message option you selected in the office manager portal.
7. Click, "Save Settings."

- ii. **Site Directory:** This page is a general overview of all the employees, reserved extensions, and Hunt Groups you have

assigned to this Site. **Note:** The Reserved Extensions and Hunt Group(s) feature will be explained in more depth below.

If you would like to see a snapshot image of this page, please refer to Figure 14 in the Appendix.

- a. **Employees:** This is a list of all the employees you have assigned to this Site. It shows the employee's first and last name, his/her outside number (if he/she has one), and his/her internal extension (how he/she can be reached within the company or through the Auto Attendant → Company Directory feature by the customer).
 - b. **Reserved Extensions:** Reserved extensions are free extensions and do not have to be purchased from Nextiva. These extensions can only be accessed internally and can not be used externally. These extensions are generally assigned to your Auto Attendant, Hunt Group(s), or department voicemails (the Auto Attendant and Hunt Group features are explained in more depth under the "3. Sites → Auto Attendant and Hunt Groups" tab on page 16 and 20).
 - c. **Hunt Groups:** Hunt Groups can be thought of as a group of extensions being attempted simultaneously. More specifically, you want the phone system to "hunt" for more than one extension at once. For example, if you have multiple departments (i.e. Sales, Billing, and Customer Service) and a customer calls in with a Customer Service inquiry; after the customer selects the "Customer Service" department option from the Auto Attendant menu (the Auto Attendant feature will be explained in more depth under the "3. Sites → Auto Attendant" tab on page 16), the call will be routed to every employee assigned to the "Customer Service" Hunt Group; not any other department or employee in the company.
- iii. **Employees:** This is where you create new employee profiles for the Site(s) you created in the "1. Company → Company Profile" tab. Click on "Create a New Employee." ***If you would like to see a snapshot image of this page, please refer to Figure 15 in the Appendix.***

Please fill in/select settings for the following fields on this page:

Name and Address

- a. **First Name:** The new employee's first name.
- b. **Middle Name:** The new employee's middle name.
- c. **Last Name:** The new employee's last name.

- d. Site: If you have more than one Site, then select which Site the specific employee belongs to from the drop down list.
- e. Include in Company Directory: This is a semi-automated feature. It coincides with the Auto Attendant feature (the Auto Attendant feature is explained in more depth under the “3. Sites→Auto Attendant” tab on page 16). If you have multiple employees with different extensions, you can include a company directory in your Auto Attendant menu. Each individual employee records his/her name from his/her phone, and the company directory will match the employee’s name with his/her proper extension from the Auto Attendant menu. Thus, a customer can listen to the directory when he/she calls your company, and select the employee he/she wants to speak with without being transferred internally.
- f. Email: The new employee’s work email address.
- g. Address: This address can not be changed in this screen, because it is a company wide feature. If the address needs to be changed, it can be accessed through the individual’s employee portal. *Note: The only way the employee can have a different address from the company is if the employee has an outside line assigned to him/her.*
- h. Time Zone: Select the time zone the employee will be working in from the drop down list.

Phone System

- a. Outside Line: *Note: *This feature is optional for employees.* If your company operates in one location, then an outside line per employee is unnecessary; unless you want each employee to have a direct line. With an outside line, the employee has the option of setting his/her own emergency address *Note: This is very important if the employee is working out of a building that is not located where the headquarter building is.* These outside lines can be purchased from Nextiva.
- b. Internal Extension: This is the employee’s employee/regular extension. Click on the “Next Available” button and the next available extension number from your employee/regular extension range will automatically appear in the field to the left. These extensions can be used to call in and out.

- c. Voicemail PIN Number: This is the 4-digit PIN Number that grants the employee access to his/her personal voicemail box. Every employee can access his/her personal voicemail box by dialing *86 from his/her phone. For simplicity, just leave this PIN Number as a default “1234,” and the employee can change it when he/she is setting up his/her account through the employee portal. **Note:** *More detailed instructions on how to setup individual employee voicemail boxes will be in the Employee Portal Guidebook.*
- d. Voicemail System Language: Select “English” from the drop down list.

Technical Phone Information

- a. MAC Address: The MAC Address functions as the physical phone’s identification number. If you make any changes to the phone’s settings through the office manager portal, the changes will automatically be transferred to the phone. **Note:** *Changes to settings can only be made from the office manager portal, not the individual employee portal.* If you purchase your phone(s) through Nextiva, the MAC Address will automatically import into your office manager portal and you can select the proper MAC Address from the drop down list. If you are using your own device(s), it needs to be configured by a Nextiva staff member first. This ensures the device is compatible with our phone system and software. If the device is compatible with our system and Nextiva is able to support the device(s), then the MAC Address will be manually input in your office manager portal by a Nextiva staff member. If you are planning to use your own device(s), please call Nextiva at 1-800-983-4289 to see if the device can be configured before attempting to setup your account. **Note:** *The MAC Address can be located number back or bottom of the phone, and it is usually 10-12 characters long.*



- b. **Device Line Number:** This feature varies depending on the phone you are using, because different phones have different line capacities. Once the MAC Address is selected, the number of lines available will be displayed in the drop down box. Select which line you want the device connected to.
- c. **Authentication Name:** This is considered the phone's username. If you purchased your phone(s) through Nextiva, the name will automatically appear in the field to the right once the MAC Address is selected. This names needs to be entered or the phone system will not recognize the phone.
- d. **Authentication Key:** This is considered the phone's password. Like the authentication name, if you purchase your phone(s) through Nextiva, the key will automatically appear once the MAC Address is selected. This key needs to be entered or the phone system will not recognize the phone.
- e. **Phone Model:** Select the correct phone model from the drop down list (i.e. SPA962).

Phone System Portal

- a. **Portal Username:** The phone's non-character and more easily identifiable name.
- b. **Portal Password:** Enter the password you want to access the phone portal.
- c. **Confirm Password:** Re-enter the new password.
- d. **Portal Language:** Select "English" from the drop down list.

Once your settings are complete click, "Save." If you change your mind while creating the new employee's profile simply click, "Cancel" and it will not save any of the settings you were making.

- iv. **Extension Manager:** This page shows the list of the reserved extensions you have already assigned and what they have been assigned to. This page also allows you to assign new reserved extensions. To create a new reserved extension click on, "Create a

New Reserved Extension.” ***If you would like to see a snapshot image of this page, please refer to Figure 16 in the Appendix.***

The following instructions show you how to add a reserved extension to this Site:

a. Extension: Click on the “Next Available” button and the next available extension in your pre-defined reserved extension range will appear in the field.

b. Connect to:

Option 1: Voicemail Retrieval or

Note: *This is the reserved extension your company voicemail and any other department voicemail box will be connected to.*

Option 2: Outside Line.

Note: *The main purpose for connecting a reserved extension to an Outside Line would be if your company operates in various locations. If an employee needed to contact another office they could simple dial the reserved extension assigned to that location without having to dial the entire phone number.*

If you choose Option 1, then you can select 1 of 2 options:

Option 1: Retrieve employee voicemail or

Note: ***DO NOT CHOOSE THIS OPTION. IT SHOULD NOT BE ON THIS PAGE.***

Option 2: Retrieve voicemail for a specific group account.

Note: *If you choose Option 2, select “Department Voicemail” from the drop down box.*

Note: *When you assign a reserved extension(s) to a department voicemail box(s), you are **UNABLE** to create a name for the reserved extension (i.e. Customer Service). So when you are assigning multiple reserved extensions to different department voicemail boxes, notate which extension connects to what department. To record a personal message for each department voicemail box, simply dial the reserved extension it is assigned to and follow the automated menu.*

Once your settings are complete click, “Save.” If you change your mind while assigning the reserved extension simply click, “Cancel” and it will not save any of the settings you were making.

- v. **Auto Attendant:** The Auto Attendant is the automated recording your customers will hear when they initially dial your company’s phone number. You can include a department menu, an employee company directory, and link a company voicemail box to the Auto Attendant. An example Auto Attendant recording is as follows: “Thank you for calling Nextiva: for Sales please press 1, for Billing please press 2, for Customer Service please press 3, for all other inquiries please press 4.” Then an employee company directory can proceed. An example is as follows: “If you know your party’s extension please dial it now, or choose the name of the employee you are trying to reach from the following directory:

please press '1' to speak with _____ (the employee's name-- which is recorded by the employee from his/her phone); please press '2' to speak with _____ (the employee's name); and etc. When the customer hears the name of the employee he/she is trying to reach, he/she can press the number associated with the employee's name and the call will be routed to the employee's phone via his/her employee extension. The Auto Attendant also makes your Hunt Group(s) function properly. When you assign different phones to different departments through employee/regular extensions, depending on what number the customer chooses, the call will be routed to the proper department and set of employee extensions assigned to that Hunt Group. ***If you would like to see a snapshot image of this page, please refer to Figure 17 in the Appendix.***

Auto Attendant Phone Numbers: This where you assign the Auto Attendant to an outside line number and reserved extension.

- a. **Auto Attendant Extension:** Click on the "Next Available" button and the next available reserved extension will automatically appear in the box. **Note:** **This is optional. You do not need to assign your Auto Attendant an extension, but you do have to assign it an outside line number. It is recommended that you assign your Auto Attendant a reserved extension so it can be accessed internally without having to dial the outside line number every time.*
- b. **External Phone Number:** **Note:** You **HAVE** to assign the Auto Attendant an outside line number. Typically, this is the number your customers dial when they call your company.
- c. **PIN for the Auto Attendant Administrator:** **Note:** *Even though you create the PIN Number in the Office Manager portal, you have to change it to the PIN Number you created here the first time you access the Auto Attendant feature from your phone. If you want to access your Auto Attendant recording, simply dial *92 from any phone and you will be prompted to enter your 4-digit PIN Number.*

Auto Attendant Menu Options:

Option 1: Use the same menu all the time or

Option 2: Use different menus for business hours and after hours.

Note: *If you choose Option 2 click on the drop down box labeled, "Use the business hours defined in" and select one of the Business Hours Schedules you created in the "1. Company → Business Hours" tab. Next, click on the drop down box labeled, "Use the after-hours menu during holidays" and*

select one of the Holiday Schedules you created in the “1. Company →Holiday Schedules” tab.

Greeting: This is where you select or upload your customized Auto Attendant recording.

Option 1: Choose an existing greeting or

Note: If you have an existing greeting you can click on the drop down box and select it from the list.

Option 2: Upload an 8 or 16 kbps wave (.wav) file from your computer.

Note: If you choose Option 2, there are 2 ways to record a personal message for your Auto Attendant.

Option 1: Recording the personal message via a computer.

Note: Majority of computers have voice recording software you can use to record your message.

1. Open your voice recording program on your computer
2. Record your Auto Attendant personal message in the computer's voice recording program via a computer microphone.
3. The computer will save your message as an 8 or 16 kbps wave (.wav) file.
4. Save the message to your desktop or in a folder of your choice.
5. Through the Nextiva office manager portal go to the “3. Sites →Auto Attendant” tab.
6. Click on the “Browse” button under the “Greeting” section.
7. Locate the 8 or 16 kbps wave (.wav) file on your computer.
8. Double click on the wave (.wav →the file must be an 8 or 16 kbps file) file you want to upload as your message.
11. After uploading the file click, “Save Changes” at the bottom of the page.

Option 2: Recording the personal message through your phone.

1. Pick up the phone and dial *92 or the reserved extension number you assigned to your Auto Attendant through the Extension Manager.
Note: The Extension Manager feature is explained in more depth under the “3. Sites →Extension Manager” tab on page 15.
2. Enter the voicemail PIN Number you created above.
3. Follow the automated menu.
4. Record your personal message.

5. When you are satisfied with the message, save it.
6. The recording will automatically upload into the field next to the “Browse” button.
7. Click, “Save Changes.”

Receptionist:

Option 1: Let the Auto Attendant answer immediately or

Note: If you select Option 1, every time a customer dials your company’s phone number he/she will always be greeted with your Auto Attendant recording.

Option 2: First try extension ____ for ____ 5, 10, or 15 seconds.

Note: If you select Option 1 or 2, you can select and set multiple keys and actions to proceed.

Here is the list of actions you can choose from:

1. Forward to extension ____ (enter the employee/reserved extension number you want the call forwarded to).
2. Forward to external phone number _____ (enter the external/outside line number you want the call forwarded to).
3. Play message (from the drop down list, you can select a message you already have on file or you can upload a new message).
4. Company Directory: This is a semi-automated feature. It is an Auto Attendant add-on feature. If you have multiple employees with different extensions, you can include a company directory in your Auto Attendant menu. Each individual employee records his/her name from his/her phone, and the company directory will match the employee’s name with his/her proper extension. Thus, a customer can listen to the directory when he/she calls the company, and select the employee he/she wants to speak with without being transferred internally by another employee.
5. Exit: Terminates the call.
6. Deposit Voicemail: Transfers the call to department voicemail box so the customer can leave a message.

Option 3: You have the option of checking the box labeled, “Allow callers to dial an extension during the greeting.” This allows the customer to dial the party’s extension at any point during the Auto Attendants recording, without having to wait through the entire message if he/she a frequent caller.

Once your settings are complete click, “Save Changes.” If you change your mind while assigning your Auto Attendant features simply click, “Cancel” and it will not save any of the settings you were making.

- vi. **Music On Hold:** *Note: We have a couple music files you can download/upload on our website: <http://www.nextiva.com>. They can be found under the “Support Center → Knowledgebase” tab. You **DO NOT** have to use the music files on our website. You can use any music file from your personal music library, as long as it is an 8 or 16 kbps wave (.wav) file. This feature is used whenever the customer is placed on hold or is being transferred to another employee/department. This allows the customer to listen to music opposed to dead air. In addition, the music makes the customer aware the call is still connected. This page allows you to turn the music on or off, select what music you would like to play, and if you would like an interrupting message to play after a specified amount of time. **If you would like to see a snapshot image of this page, please refer to Figure 18 in the Appendix.***

Status: This lets you know if the music feature is currently on or off. If the music feature is on/off the field will read, “Music On Hold is currently ON/OFF.” If you want the setting to be changed, simply click on the box to the right that reads, “TURN ON/OFF.”

Continuous Play Recording:

- a. **Current File:** If you have a music file(s) already uploaded and playing, it will show you what file(s) is currently uploaded.
- b. **Upload New File:** If you want to add another music file, this is where you upload an 8 or 16 kbps wave (.wav) file. Click on “Browse” and upload the file from your computer.

Interrupt Recording: This feature allows you to interrupt the continuous music file while it is playing and insert a small personal message (i.e. “Thank you for holding, a representative will be with you shortly”). *Note: The interrupting message can only be uploaded from your computer. This message **CAN NOT** be recorded from your phone.*

- a. **Current File:** If you have a personal message(s) already uploaded and playing, it will show you what file(s) is currently uploaded.
- b. **Interrupt Interval:** Insert the number of seconds you want to elapse before the interrupting message is replayed.

Once your settings are complete click, “Save Changes.” If you change your mind while assigning your Music On Hold features simply click, “Cancel” and it will not save any of the settings you were making.

- vii. **Hunt Groups:**

Add a Hunt Group: Hunt Groups can be thought of as a group of extensions being attempted simultaneously. More specifically, you want the phone system to “hunt” for more than one extension at once. For example, if you have multiple departments (i.e. Sales, Billing, and Customer Service) and a customer calls in with a Customer Service inquiry; after the customer selects the “Customer

Service” department option from the Auto Attendant menu (the Auto Attendant feature is explained in more depth under the “3. Sites→Auto Attendant” tab on page 16), the call will be routed to every employee assigned to the “Customer Service” Hunt Group; not any other department or employee in the company. ***If you would like to see a snapshot image of this page, please refer to Figure 19 in the Appendix.***

- a. Hunt Group Name: This is name should be simple and identifiable. (i.e. Sales, Billing, Customer Service)
- b. Extension: Click on the “Next Available” button and the next pre-defined reserved extension will automatically appear in the field.
- c. External Phone Number: Select the outside line from the drop down list you want the Hunt Group associated with. **Note:** * This field is optional. Not every Hunt Group needs an external number attached to it.
- d. Voicemail PIN: **Note:** Even though you create the PIN Number in the Office Manager portal, you have to change it to the PIN Number you created here the first time you access the Hunt Group voicemail box from your phone. This is the 4-digit PIN Number needed to access the Hunt Group’s voicemail box.
- e. Ring Type:
Option 1: Ring all phones at once for 5-60 seconds or
Option 2: Ring one at a time and ring each phone number for 5-60 seconds.
- f. Hunt Group Members
Available: This is a list of all the employees that are assigned to this Site.
Assigned: You can assign up to 5 employees for each Hunt Group you create. Click on the employee’s name in the “Available” box that you want in the Hunt Group. To add an employee(s) name to the “Assigned” box, click on the double arrow box pointing right in the center. To remove an employee(s) from the “Assigned” box back to the “Available” box, click on the double arrow box pointing left in the center.
- g. Include in Company Directory: This is a semi-automated feature. It is an Auto Attendant add-on feature. If you have multiple employees with different extensions, you can include a company directory in your Auto Attendant menu. Each

individual employee records his/her name from his/her phone, and the company directory will match the employee's name with his/her proper extension. Thus, a customer can listen to the directory when he/she calls the company, and select the employee he/she wants to speak with without being transferred internally by another employee.

Once your settings are complete click, "Save." If you change your mind while creating the new Hunt Group simply click, "Cancel" and it will not save any of the settings you were making.

- viii. **Device Assignment:** This page displays a list of every device you own, as well as the device's information which includes: the manufacturer's name, the model number of the device, the device's MAC Address, and the line number it has been assigned to. *If you would like to see a snapshot image of this page, please refer to Figure 20 in the Appendix.*

Each device can be assigned to a different employee. Click on the drop down box to the right of the "Line No." and a list of all the employee names you have entered into the system will appear. Select the appropriate name and the device will configure to the employee's personal specifications (these specifications can be set in the employee's portal). *Note: These employee specifications are explained in more detail in the Employee/Customer Portal Guidebook.*

Once your settings are complete click, "Save." If you change your mind while assigning an employee to his/her device(s) simply click, "Cancel" and it will not save any of the settings you were making.

- ix. **Call Usage:** This page shows you the list of employees assigned to this Site, the total number of inbound and outbound calls each employee has received/made for the month, the amount of free time (explained in more depth below) that was used during the month, and the amount of billed time (explained in more depth below) for the a specific month. To view the statistics for a specific month, click on the drop down box and select the month you want to view.

Free time: The amount of pre-paid time the company has used for the month so far.

Billed time: Any overages (time used above and beyond the package you purchased; making international calls) incurred during the month.

If you would like to see a snapshot image of this page, please refer to Figure 21 in the Appendix.

4. Vital Statistics

Note: These statistics can be found in the control panel area. They are visible all the time and not can be changed. They automatically update every month.

4A. Total Extensions: The total number of extensions you have purchased and are available for use.

4B. Extensions In Use: The number of extensions you have already assigned somewhere.

4C. Outside Lines: The number of outside lines you purchased and are available for use.

4D. Outside Lines In Use: The number of outside lines you have already assigned somewhere.

4E. Credit Limit: This is the dollar amount of credit Nextiva extends to you in case you go over your purchased package minutes. Generally, credit is used to compensate for minute overages and any international calls placed throughout the month. *Note: If you notice that you are continuously going over your package minutes, you may want to consider upgrading your plan. Majority of the time, it is cheaper to upgrade your package rather than paying the overages. You can do this yourself in the “1. Company → New Order” tab or call us at 1-800-983-4289.*

4F. Credit Used: This dollar amount tells you how much extended credit you have used for the month.

4G. Time Left: This is the number of minutes you have left your package for the month. *Note: If you purchased an unlimited package, the time left will read “Unlimited.”*

4 H. Time Used: This is the amount of minutes you have used so far for the current month.

5. Users

5A. Office Managers Users: This page shows the list of individuals who have access to the office manager portal. It displays the individual’s username, his/her first name, his/her last name, and the Sites he/she has access to. This page also allows you to add and delete specific users.

- i. **Add a User:** *If you would like to see a snapshot image of this page, please refer to Figure 22 in the Appendix.*
 - a. **First name:** The new user’s first name.
 - b. **Last name:** The new user’s last name.
 - c. **Username:** The new user’s username. This name can be the employee’s name or it can be something different.
 - d. **Password:** The new user’s password to login to the office manager portal.
 - e. **Confirm Password:** Repeat the new password.
 - f. **Access:** This allows you to give the new user full access to all the company Sites’, or you can limit his/her access by selecting which Site he/she can access from the drop down list.

Option 1: Give the user access to all sites or

Option 2: Only give access to one site.

Note: If you select Option 2, click on the drop down box and select the Site you want to give the new user access to.

Once your settings are complete click, “Save.” If you change your mind while creating the new user simply click, “Cancel” and it will not save any of the settings you were making.

6. Conclusion

If you have made it through this guidebook, your phone system should be ready to use and operate effectively and efficiently! Enjoy your new phone system that has big business features, for small business prices. If you run into any complications, refer back to the appropriate section in this guidebook or feel free to email us at support@nextiva.com or contact a Support Specialist at 1-800- 983-4289.

Next, you are ready to setup your employee portals with the Employee Portal Guidebook. If you do not already have this document, contact us via email or phone and we will be happy to email it to you.

7. Appendix

Figure 1:



Figure 2:

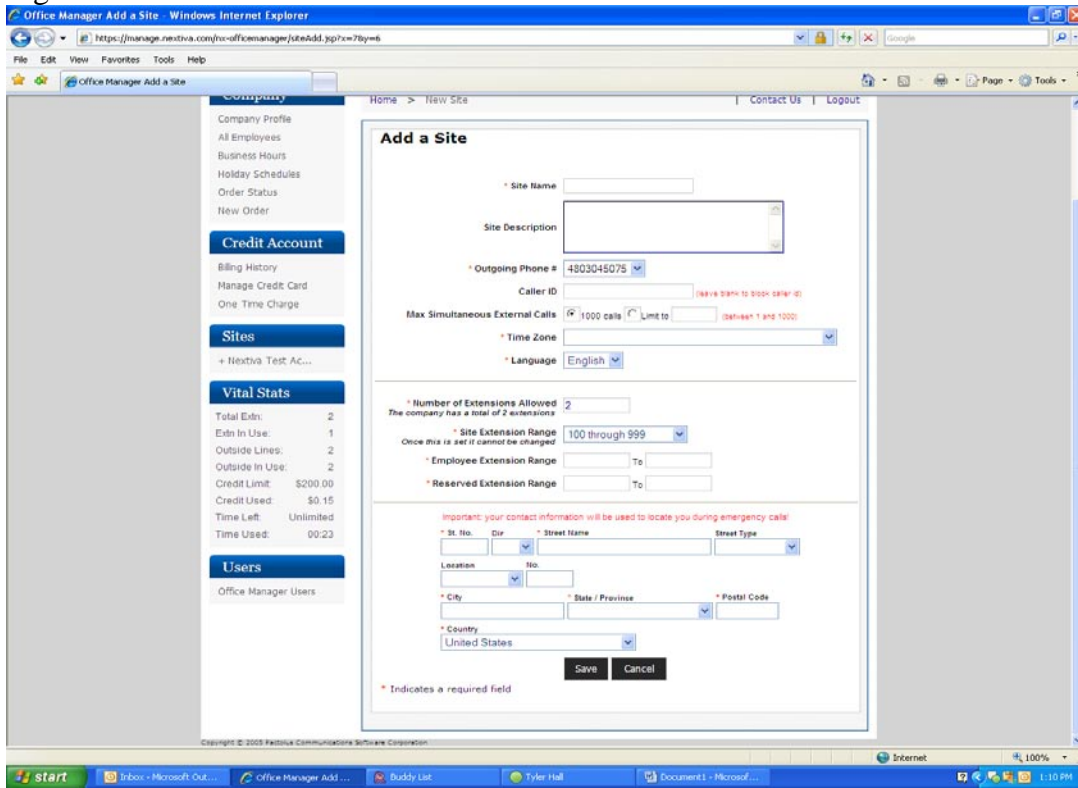


Figure 3:



Figure 4:

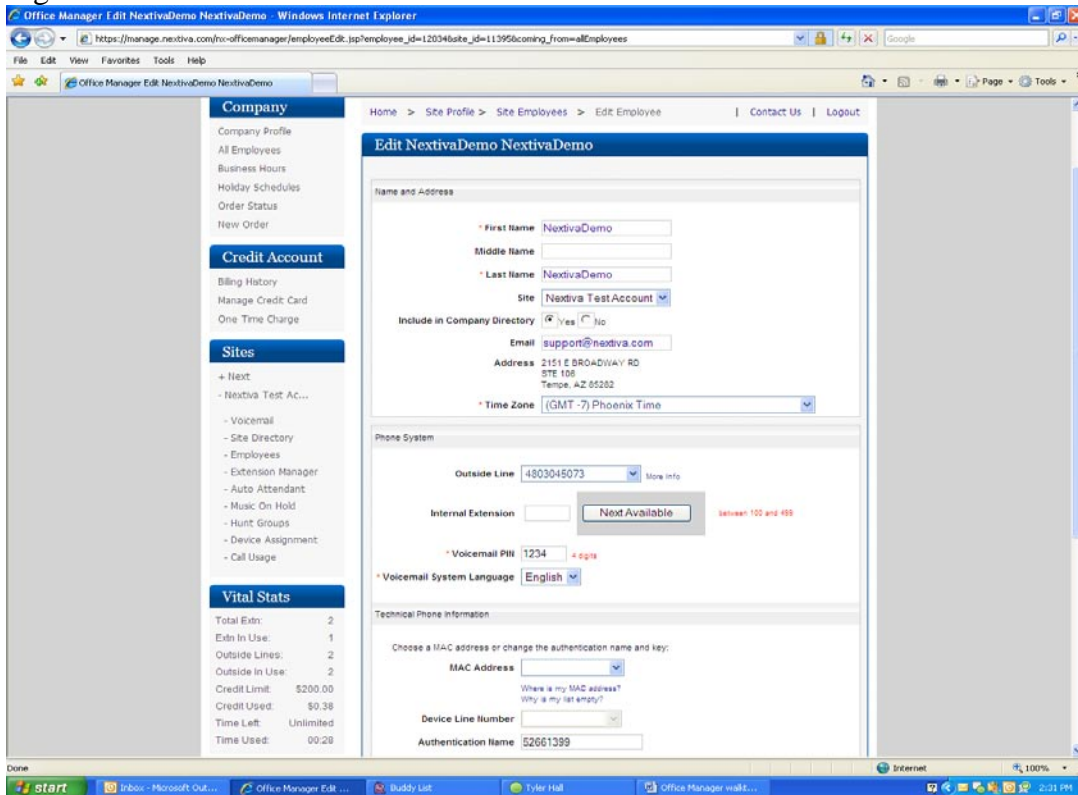


Figure 5:

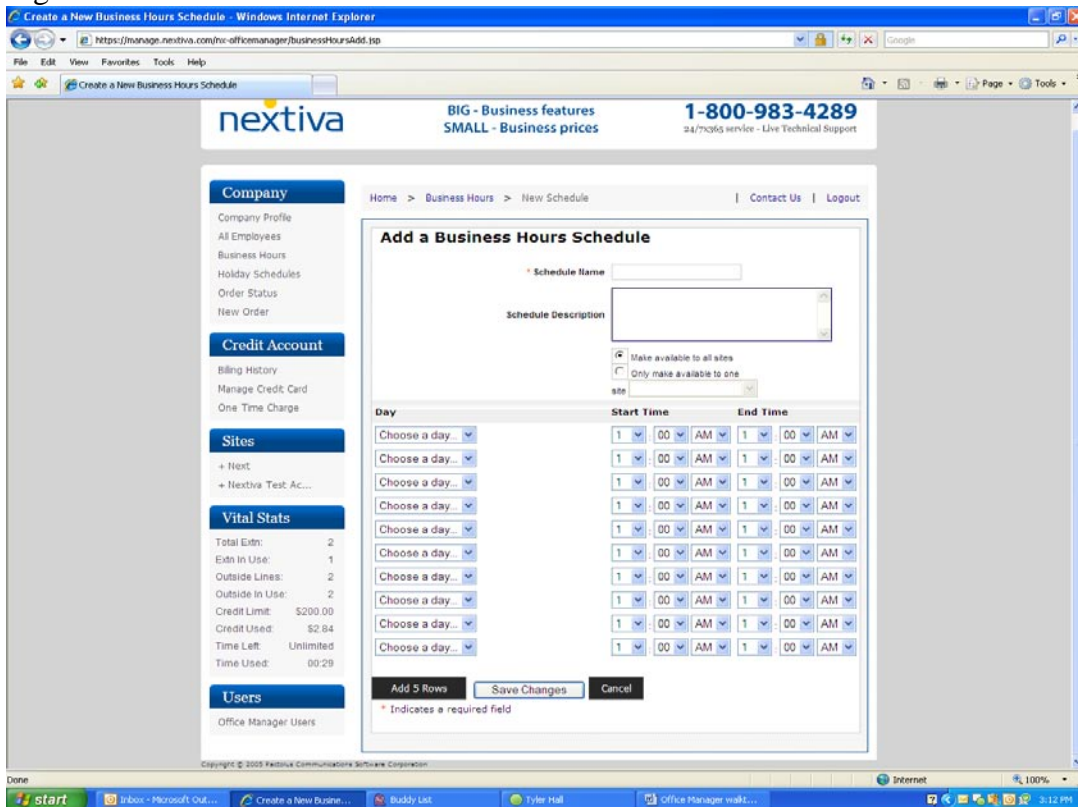


Figure 6:

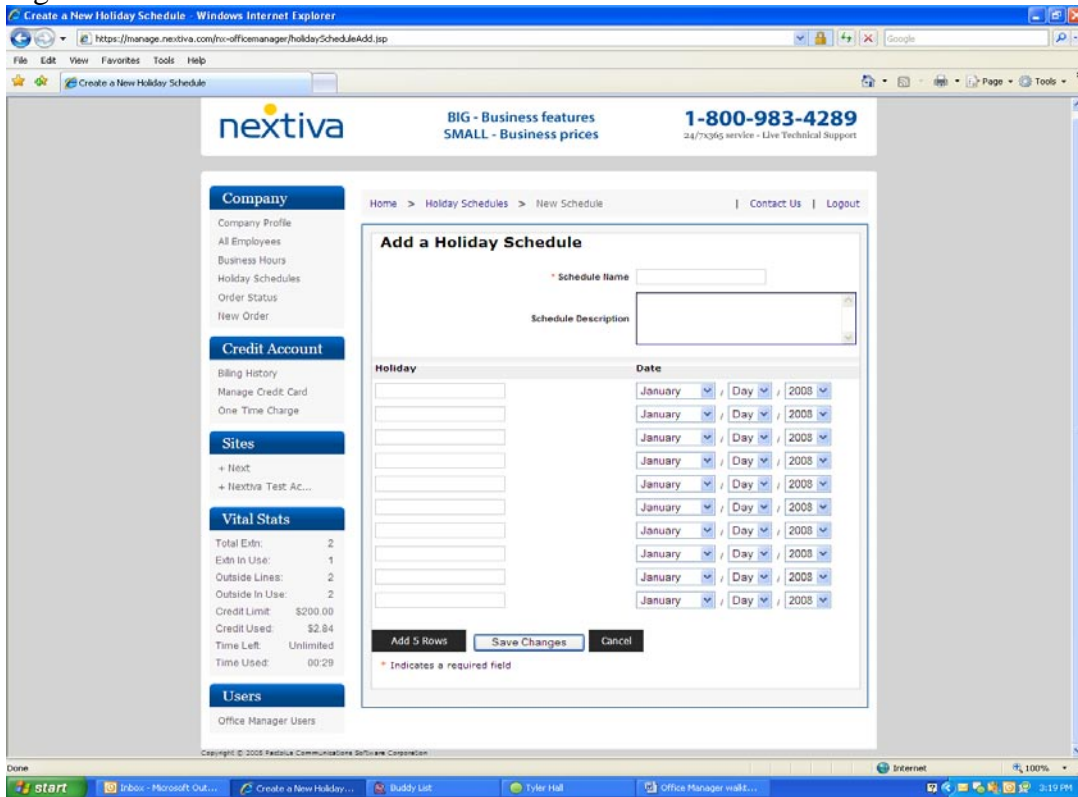


Figure 7:

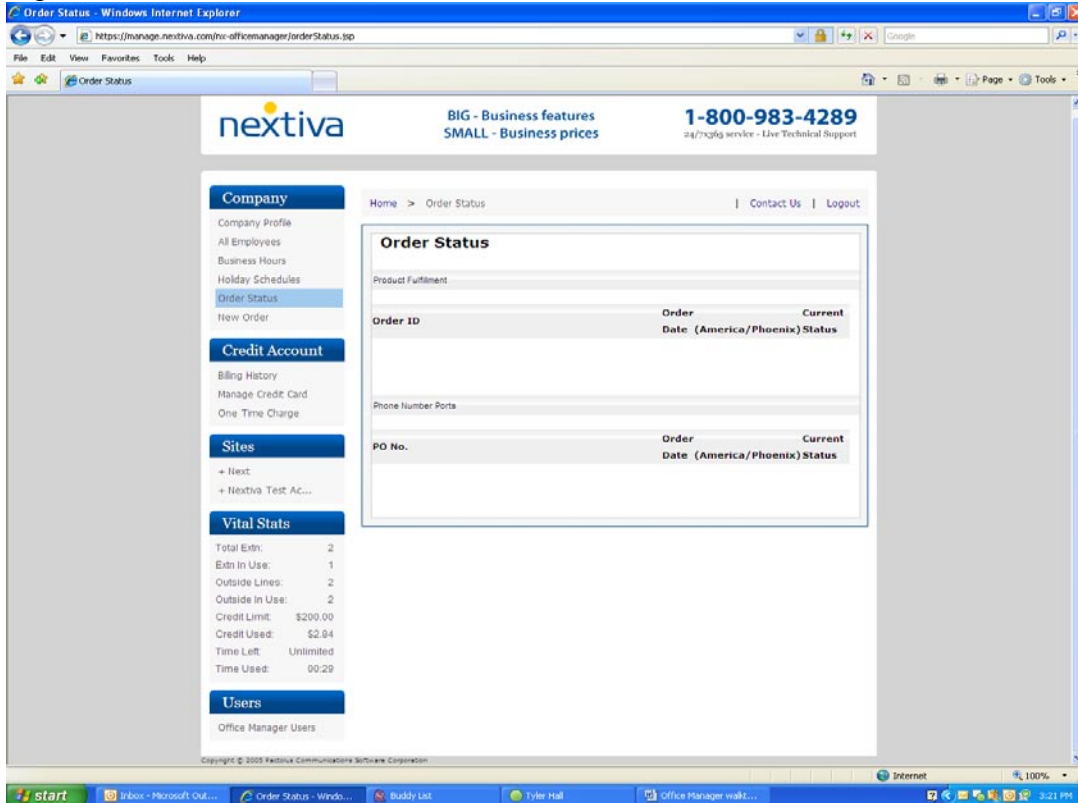


Figure 8:

The screenshot shows the 'New Order' page in a web browser. The sidebar on the left contains several sections: 'Company' (Company Profile, All Employees, Business Hours, Holiday Schedules, Order Status, New Order), 'Credit Account' (Billing History, Manage Credit Card, One Time Charge), 'Sites' (+ Next, + Nextiva Test Ac...), 'Vital Stats' (Total Extn: 2, Extn In Use: 1, Outside Lines: 2, Outside In Use: 2, Credit Limit: \$200.00, Credit Used: \$2.84, Time Left: Unlimited, Time Used: 00:29), and 'Users' (Office Manager Users). The main content area is titled 'New Order' and includes a 'Please select a package.' section. Below this is a table with columns: 'Purchase Recurring', 'Price', 'Quantity', and 'Total'. The table lists various services such as 'Additional SPA922', 'Additional SPA962', 'Additional WRP400-G1', etc. A 'Continue >>' button is located at the bottom of the table. A note at the bottom states: '* The recurring fee will be charged every month.'

Figure 9:

The screenshot shows the 'Billing History' page in a web browser. The top of the page features the Nextiva logo and the tagline 'BIG - Business features SMALL - Business prices' along with the phone number '1-800-983-4289' and '24/7x365 service - Live Technical Support'. The sidebar on the left is identical to the 'New Order' page. The main content area is titled 'Billing History' and includes a 'Choose a Month:' dropdown menu set to 'June'. There are options to 'Download CSV File', 'Show all charges and credits', and 'Sort by Employee'. Below this is a table of call records for June 26 and June 25. The table has columns: 'No.', 'Description Employee', 'Time America / Phoenix From', 'To', and 'Duration Amount'. The records show various call types such as 'Broadband Call' and 'Broadband Call' with specific times and durations.

Figure 10:



Figure 11:



Figure 12:



Figure 13:

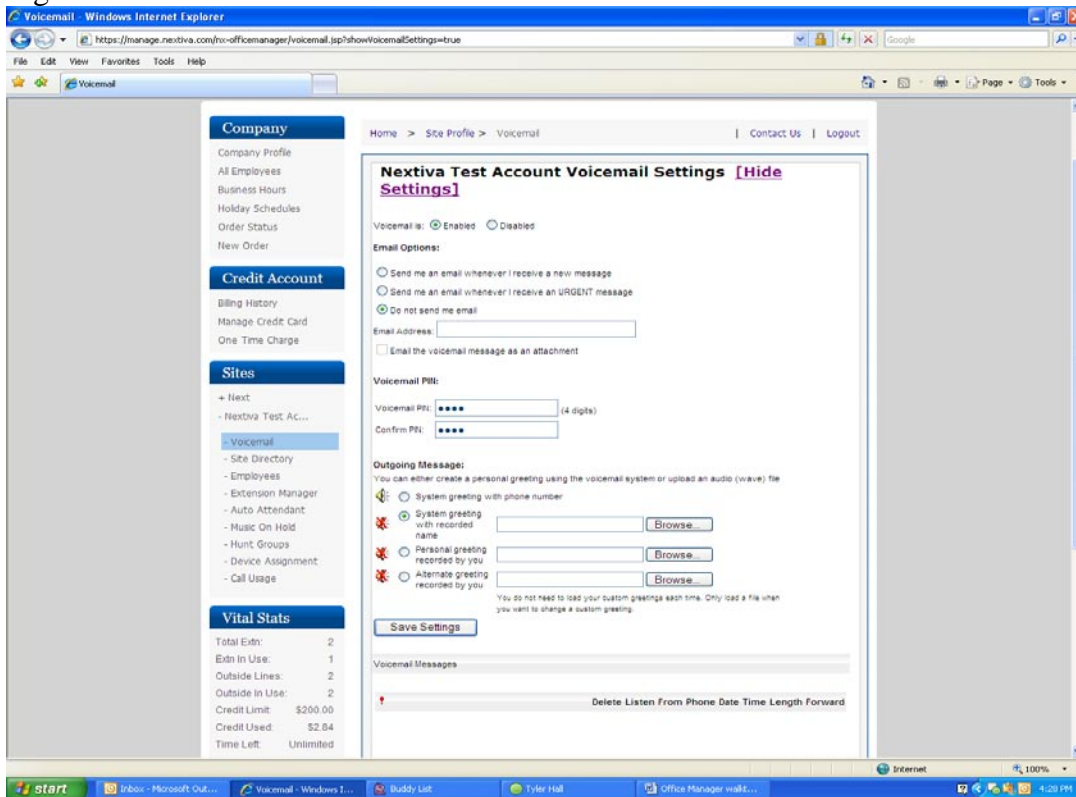


Figure 14:

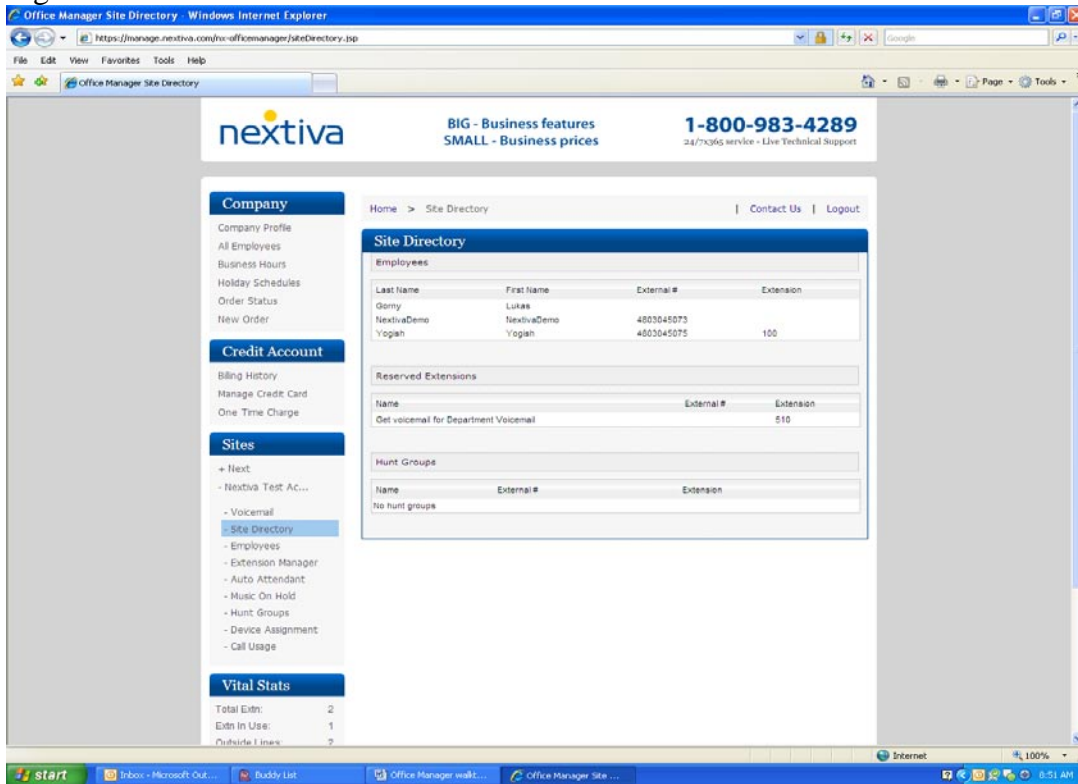


Figure 15:

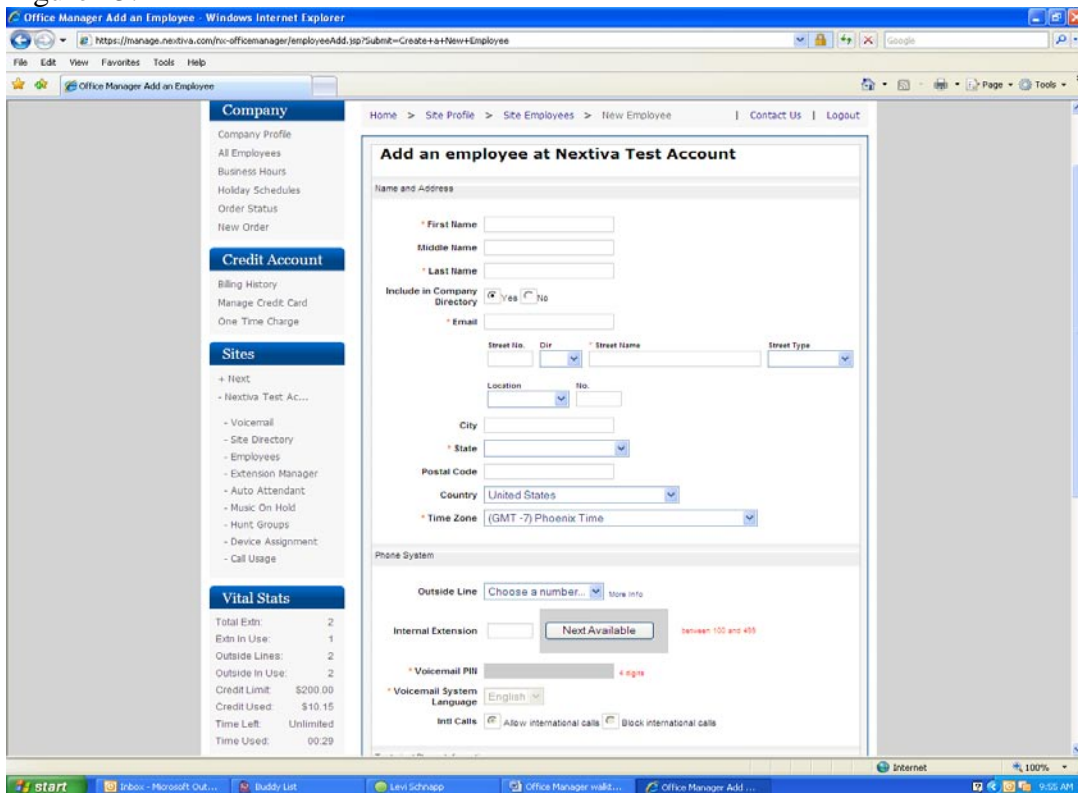


Figure 16:

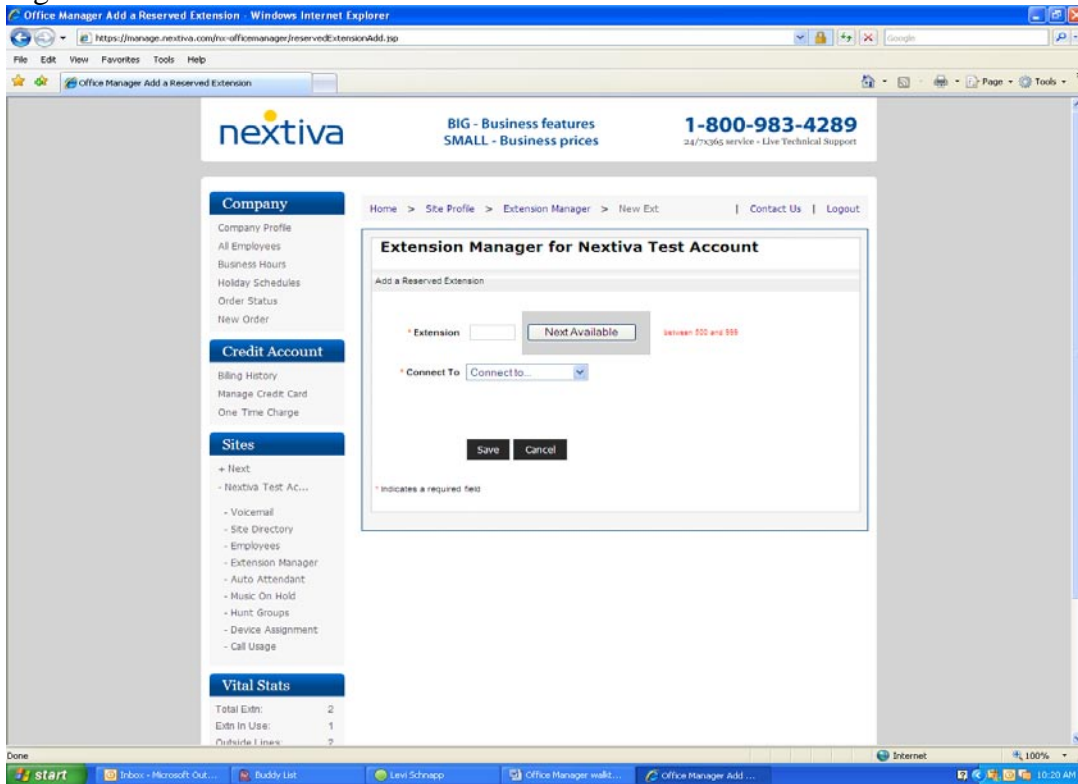


Figure 17:

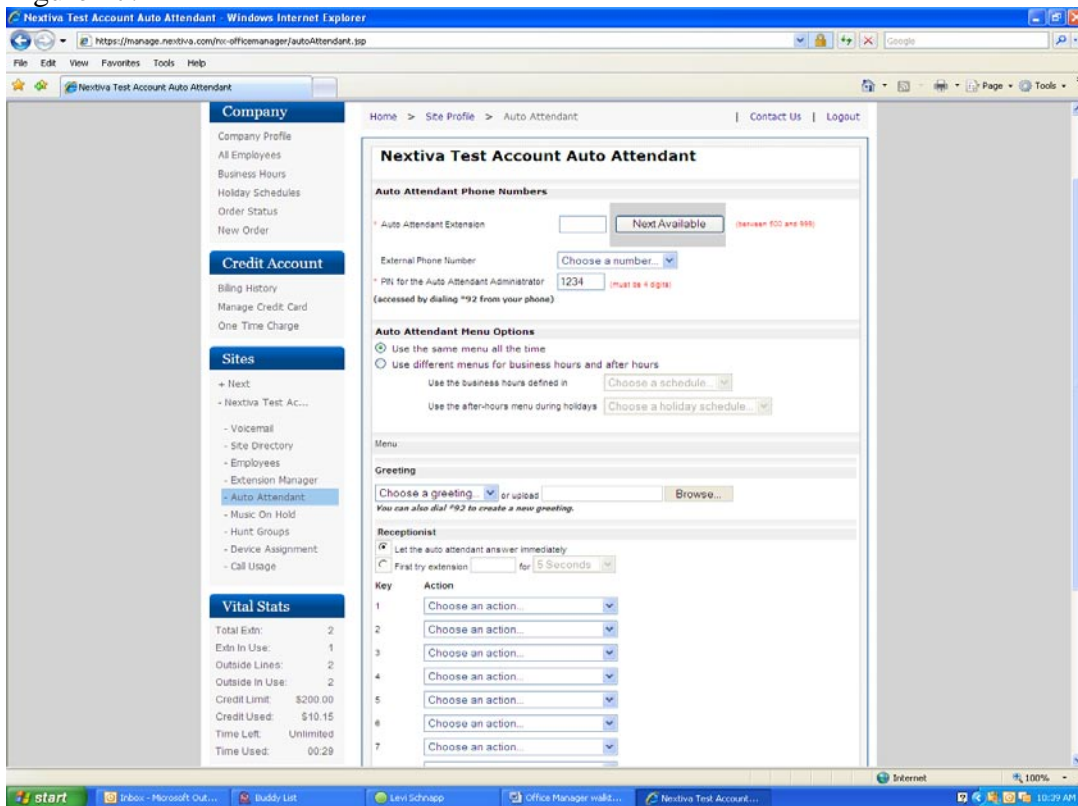


Figure 18:

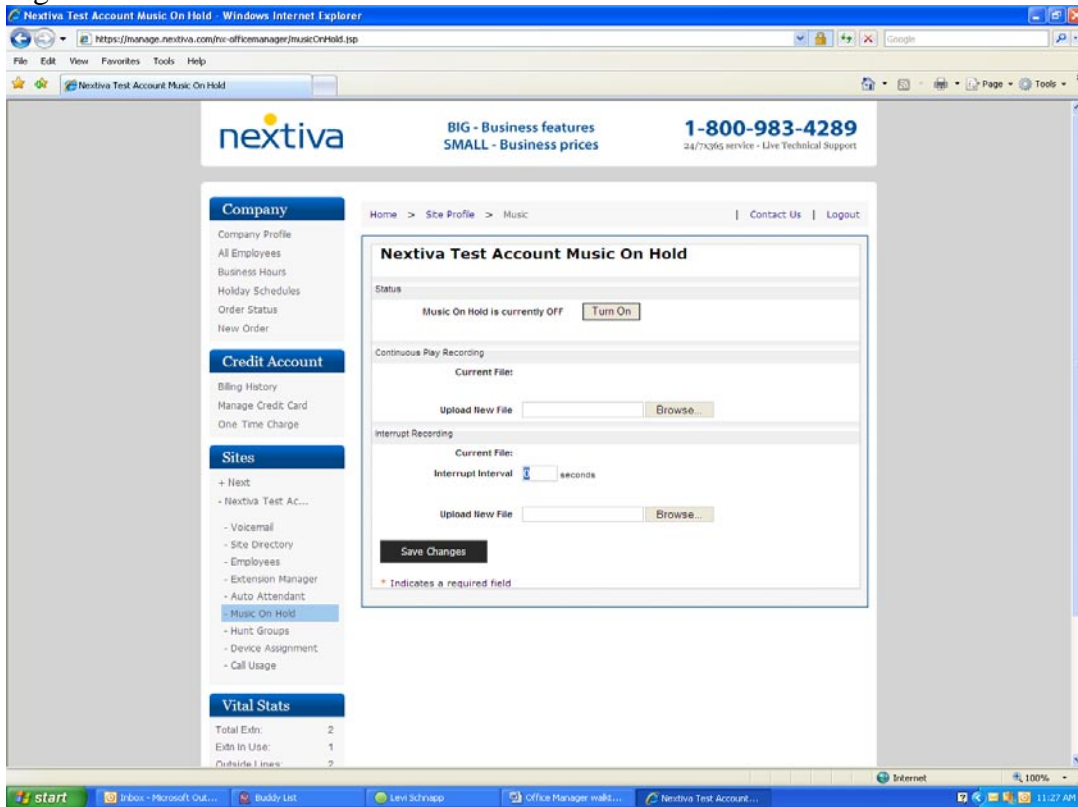


Figure 19:

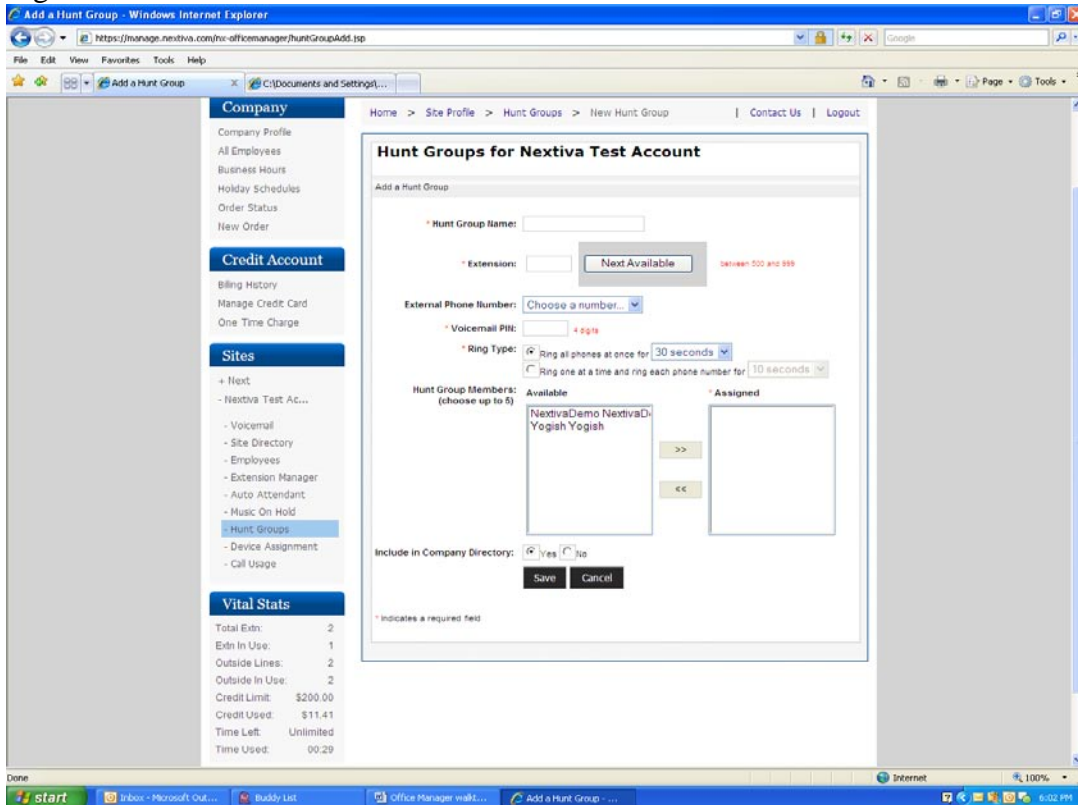


Figure 20:

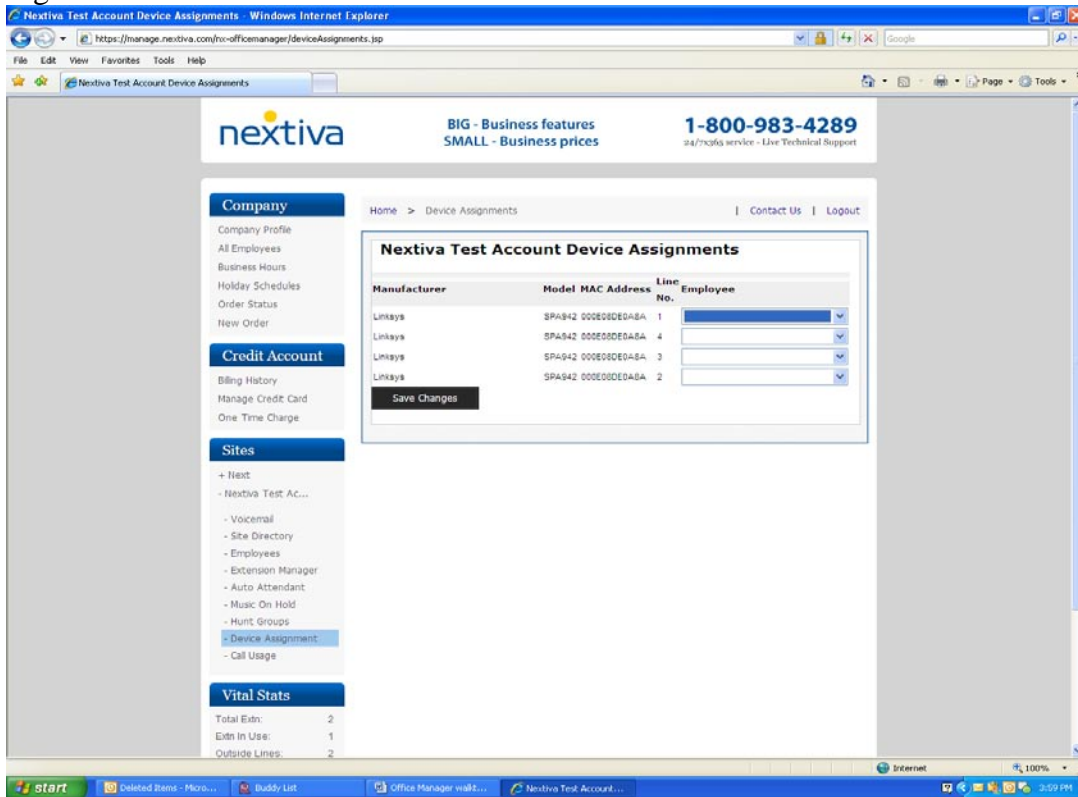


Figure 21:

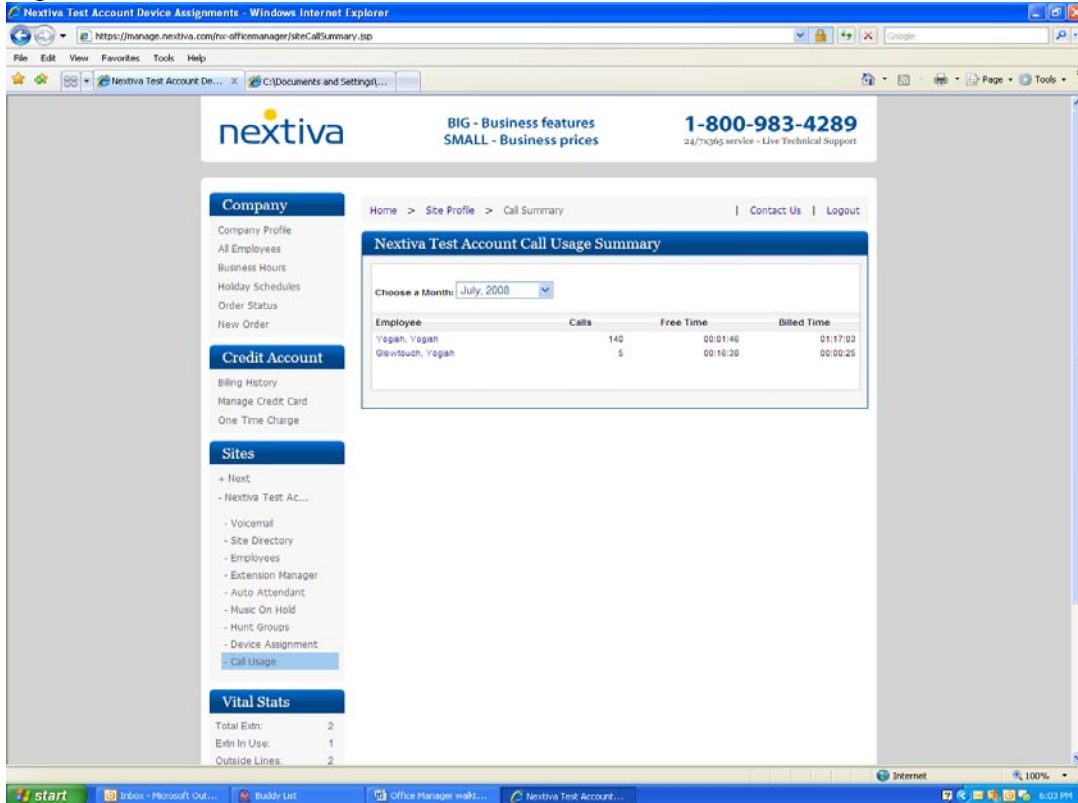


Figure 22:

