



Implementation Overview

Mid-Market & Enterprise



Welcome to Nextiva. Let's get started.

On behalf of Nextiva, I'd like to personally thank you for trusting us with your business communication needs. We understand that partnering with us to support your company's growth is a huge decision.

Our team is committed to giving you our best—and proving Nextiva's Amazing Service.

Getting started is an important time in your Nextiva journey. We partner with you to make this transition as simple as possible. You'll be joined by

a team of professionals to guide you through the implementation process.

In the following pages, you'll learn how Nextiva recommends deploying services, what we do to help, and what part you play.

We tailor our process to give you options ranging from do-it-yourself with the help of online tutorials to on-site help from our Professional Services team. Welcome to Nextiva!

Kind Regards,

Mike Stotts



Mike Stotts

Head of Implementation



What's already in the works

Here's what's already happening and must be completed before we can continue the implementation process.

Receiving shipped equipment.

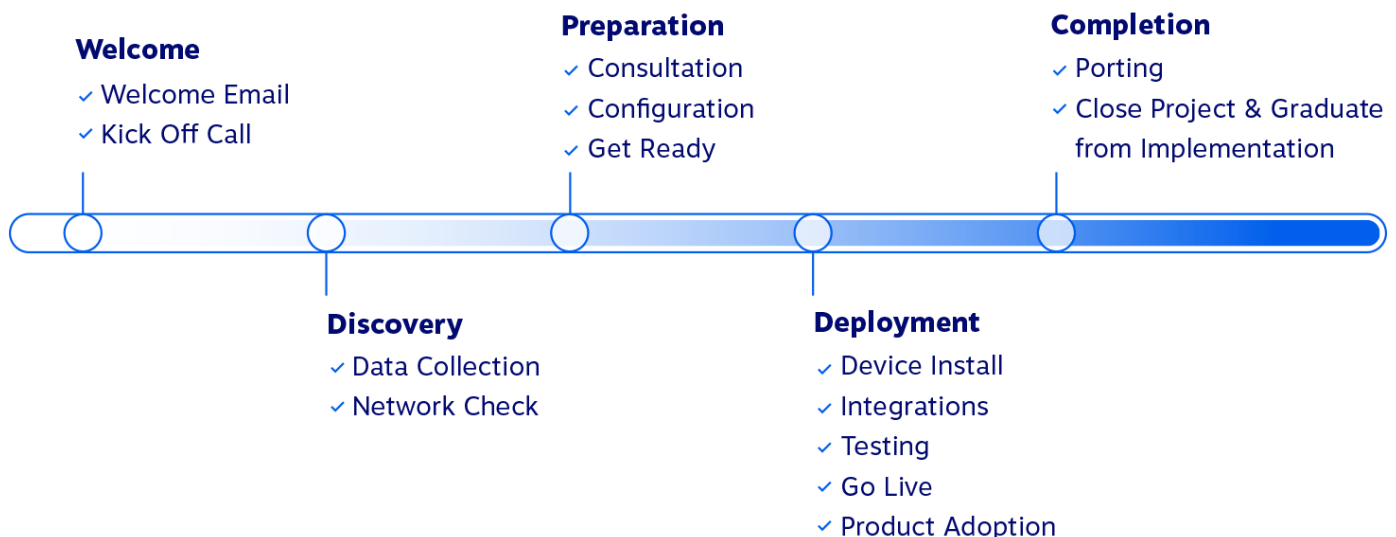
- Devices purchased or rented from Nextiva will ship once payment is processed (if you ordered Extension Validation, your devices will ship after Configuration).
- Your order may ship via FedEx prior to your first contact with the Implementation team. Please securely store your shipment until you are ready to unbox and install the equipment.
- If you're bringing your own equipment, the make and model should be vetted before implementation starts to ensure we are prepared to support the device(s).

Providing roles and contacts.

- Your Sales team has provided Nextiva's Implementation team with your list of contacts and their roles.
- We can add or remove contacts as needed throughout the project.

Implementation in five stages

Check out the following pages for more detail on the process. While this is a general process, your experience may differ depending upon your unique needs.



Introducing the Nextiva Implementation Team

The Nextiva Implementation Manager

Your main point of contact assigned at your first scheduled meeting. They will coordinate resources and specialists throughout the setup process.



Admissions Agent

Sends the welcome email and helps with pre-implementation information gathering.



On-site Support

Nextiva can arrange for on-site support to travel to you for an additional fee.



Implementation Techs

Technicians meet you on scheduled conference calls to help with technical work.



Specialists

Your Implementation Manager will coordinate with specialists when needed.

Setting expectations: When we need your help

The paperwork

Data Collection

- The first step is to gather information about your company and business. You can start now by completing the [Data Collection Template](#). For more information, see Data Collection on Page 3 of the [Implementation Deep Dive](#). The implementation team can answer any questions you have.

Spoofing and Number Transfer [aka Porting]

- We need a completed [Letter of Authorization \(LOA\)](#) to move your voice and fax numbers to Nextiva.
- We need a completed [Spoofing Form](#) to show your business numbers on outbound calls prior to the numbers porting. You will need to provide the most recent copy of your bill from your current provider (include all pages).

Authorized Users

- To protect the security of your account, Nextiva asks that you determine who is authorized to access the account. You can do this online or complete a form. Learn more [here](#).



The preparation

Key roles in your organization for stakeholder alignment.

- Main Point of Contact: Charged with communications and decision-making.
- Network Admin: Can access your network equipment and make changes, if necessary.
- Operations Manager: Expert in your business operations who can provide call flow and feature use cases.

Implement Network Guidelines.

- We will help review your office network during the Network Check appointment to ensure you are set up for success according to Nextiva's Networking Guidelines.
- We highly recommend implementing **Nextiva's Network Guidelines** as your local network configuration directly impacts the quality of service.
- We rely on you to account for all network equipment

Download software and participate in online training.

- Nextiva offers online training and resources to cover the basics.
- Some training topics are better covered by a Subject Matter Expert (SME) using a virtual live conference. The Nextiva Implementation Manager will help coordinate this for you.
- In person training is available with Nextiva's Professional Services at an additional cost.

Choose a custom greeting method.

- Record greetings yourself. This can be done using the online portal, through a Nextiva device, or a combination of the two.
- Provide audio files. You can provide audio files to the Nextiva Implementation Manager for Nextiva to upload for you.
- Use Nextiva's Professional Recording team. Learn more [here](#). (additional fee may apply).

The go live

Install your devices.

- Connect your devices to internet and power. For information regarding installation, refer to Page 8 of the **Implementation Deep Dive**. You can purchase On-site Services for help.
- If you're bringing your own devices, contact the previous provider to ensure the equipment is unlocked and able to be reprogrammed to a new service provider.

Participate in testing.

- The Nextiva Implementation Manager will help coordinate live virtual calls with the Implementation Techs and your Operations Manager to test and deploy the Nextiva services.
- If you purchased On-site services your Operations Manager will still participate in testing.

Contact your previous provider to forward calls.

- If porting numbers, an authorized representative on the previous service provider's account must request the call forwarding (multi-path call forwarding to be exact). Or, you may be able to enable forwarding in an online portal. This will start routing calls to your Nextiva service and devices.
- The Nextiva Implementation Manager will provide the information needed to complete the task.

We are here to help and we will always provide our best effort. We ask that you attend scheduled appointments and communicate openly with us to keep progressing forward.

Any questions or concerns? No problem. The Nextiva Implementation team can help.

We can talk in real-time on your Kick-Off Call. For urgent matters, simply reply to your welcome email or contact onboarding@nextiva.com.

Additional services provided by Nextiva

Professional Services

The following services require Subject Matter Experts (SME) outside the scope of standard implementation. Contracting with Nextiva's Professional Services Team is necessary for these custom configurations and incurs an additional cost.

- **Advanced IVR:** This is a highly configurable call routing system with advanced features available through Nextiva. This system is not part of Nextiva's NextOS Platform, meaning you will not see it in your Nextiva portal.
- **Nextiva CRM:** This is a simple environment to get started in, but if you are migrating from another CRM, allow a CRM expert from Nextiva's Professional Services team to assist you.
- **Azure Active Directory:** This helps clients sync their employee list with Nextiva's system.
- **Single Sign-On (SSO):** This allows our customers to sign into NextOS and to the Nextiva App by signing into their own 3rd-party identity provider.
- **Additional services** requiring Professional Service help: Five9 VCC, Unity CC Media Streams, and Akixi reporting

On-Site Services

Standard implementation is conducted remotely using online conferences. For someone to come on-site to help with the deployment, see the [On-site Service PDF](#). Additional costs will apply (the PDF reviews the pricing structure).

We require lead time to coordinate an on-site visit: 5 business days (1 week) for Standard & 10 business days (2 weeks) for Xbert.

We're here to help

For ongoing assistance, Nextiva offers multiple resources. Please keep in mind that while anyone may receive general information and assistance, requests requiring account information or changes must be done by an **authorized user**.

Self-Serve support: nextiva.com/support

- Online chat support
- Submit a support ticket
- Password reset

Phone support: **(800) 285-7995**

