Nextiva CRM
Leads & Opportunities

VERSION 2
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Nextiva CRM: Leads and Opportunities

Nextiva’s Customer Relationship Management tool (CRM) enhances customer relationships by tracking the customer journey from recruitment to cancelation. Nextiva CRM improves business productivity, customer sentiment, profitability, and communication processes all within one system, increasing customer loyalty and retention.

For sales teams and business development reps, pipeline analytics are key to measuring growth or decline, which is essential to any organization. Whether you prefer using visual views (Board/Kanban view) or tracking using searchable lists of prospects, Nextiva CRM Leads and Opportunities will elevate your team to save time and energy.

**TIP:** Start utilizing our default or custom stages for Opportunities, then implement Nextiva CRM Automation to create outbound communication with prospects throughout recruitment.

Use Nextiva CRM Leads and Opportunities to:
- Identify sales prospects.
- Convert Leads to Opportunities to accurately track pipelines.
- Utilize Opportunity stages based on your company needs.
- View sales analytics and customer insight.
- Communicate via CRM.
Logging In

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

Welcome to NextOS!

Voice & Analytics Unified communications for every business
CRM Manage customers and your pipeline
Chat Engage in real time conversations
Surveys Collect powerful feedback
Analytics Insights to drive your business
Cospace Collaborate with your team

NextOS Home Page

Leads

Leads in Nextiva CRM help sales agents and managers manage and qualify potential prospects and access key performance indicators at the speed of light.

Creating Leads is the first official stage of the sales life cycle. Often a “discovery” call occurs during this stage to determine whether the Lead is real and interested.

Click Lead from the left panel to view all Lead records in Nextiva CRM.
Users can perform the following actions in Lead view:

A. **Add New:** Click the Plus (+) icon to add new: Account, Contact, Case, Lead, Opportunity, Product, or a custom option.

B. **Export Leads:** Select the checkbox next to any Lead and click Export to create a .csv file.

C. **View Lead Details:** Click the Lead for more information.

D. **More Options:** Click the Ellipsis (…) next to a Lead to Watch, Open in Background, and Delete. **Watch** allows you to receive alerts if the Lead is changed. **Open in Background** opens a new tab with the Lead. **Delete** may not be an option for all Users, based on permissions.
Creating Leads

1. Click the **Plus (+)** icon and select **Lead**.
2. Complete the **New Lead** form. Click **Create**.

![New Lead Form](NewLeadForm.png)
Lead Workspace

Click on any Lead to view all details. In the Lead Workspace view you can see and edit Lead details, send emails, add notes, and qualify the Lead to an Opportunity.
Details Tab

Within the **Details** tab view and edit the Lead information, such as the contact name, company, phone number, email, and more.
Qualify a Lead

When a prospective customer has more than a 10% chance of becoming a sale (or whatever likelihood you choose), it's time to qualify the Lead and convert it to the Opportunity stage. Sales associates and managers can easily track Leads and prospects through all stages of the sales life cycle under Opportunities in Nextiva CRM.

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.
Opportunities

Accurately tracking potential sales is vital to a company’s success. Not only can you manage each stage of the sales life cycle simply and professionally, but by associating your specific Products and pricing to CRM, the system will automatically calculate the value of the Opportunity too.

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. **Add New:** Click the **Plus (+)** icon to add new: Account, Contact, Case, Lead, Opportunity, Product, or a custom option.
B. **View Options:** Select **Table** or **Board** view. For information, see below.
C. **Export Opportunities:** Select the checkbox next to any Opportunity and click **Export** to create a **.csv** file.
D. **View Opportunity Details:** Click the Opportunity to view more information.
E. **More Options:** Click the **Ellipsis (…)** next to a Lead to **Watch**, **Open in Background**, and **Delete**. **Watch** allows you to receive alerts if the Lead is
changed. **Open in Background** opens a new tab with the Lead. **Delete** may not be an option for all Users, based on permissions.

**TIP:** Users can override the Product total by entering an amount to reflect discounts or markups.

### Table View

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

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Contact Name</th>
<th>Amount</th>
<th>Stage</th>
<th>Source</th>
<th>Score</th>
<th>Expected Close</th>
<th>Actual Close</th>
<th>Close Date</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informing the Team</td>
<td>J. Gordon</td>
<td>$1,400.00</td>
<td>Needs Assessment</td>
<td>Phone</td>
<td>2</td>
<td>2019-10-28 03:47 PM</td>
<td></td>
<td></td>
<td>Sales</td>
</tr>
<tr>
<td>Sachs Architecture</td>
<td>Sarah Smith</td>
<td>$250.00</td>
<td>Closed/Won</td>
<td>Video</td>
<td></td>
<td>2019-11-07 12:00 AM</td>
<td>2019-11-08 12:00 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Breuer Brothers &amp; Co</td>
<td>Kevin Brown</td>
<td>$3,500.00</td>
<td>Proposal Quote</td>
<td>Email</td>
<td>5</td>
<td>2019-11-01 12:00 PM</td>
<td></td>
<td></td>
<td>Sales</td>
</tr>
<tr>
<td>Foss Roof</td>
<td>John Tompkins</td>
<td>$99.00</td>
<td>Proposal Quote</td>
<td>Phone</td>
<td>4</td>
<td>2019-10-26 05:00 PM</td>
<td></td>
<td></td>
<td>Sales</td>
</tr>
<tr>
<td>Emergency HVAC</td>
<td>John Jones</td>
<td>$249.00</td>
<td>Proposal Quote</td>
<td>Video</td>
<td>3</td>
<td>2019-11-01 01:00 PM</td>
<td></td>
<td></td>
<td>Sales</td>
</tr>
<tr>
<td>Prophetic Events</td>
<td>Jane Smith</td>
<td>$3,000.00</td>
<td>Closed/Won</td>
<td>Phone</td>
<td>5</td>
<td>2019-10-15 12:00 PM</td>
<td></td>
<td></td>
<td>Sales</td>
</tr>
<tr>
<td>A. Risto</td>
<td>Donna Johnson</td>
<td>$180.00</td>
<td>Closed/Won</td>
<td>Video</td>
<td>4</td>
<td>2019-10-28 05:00 PM</td>
<td>2019-10-28 07:30 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marquis Service Corp</td>
<td>Susan Taylor</td>
<td>$499.99</td>
<td>Closed/Won</td>
<td>Phone</td>
<td>5</td>
<td>2019-10-10 01:00 PM</td>
<td>2019-10-09 12:00 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quick Trading Company</td>
<td>John Doe</td>
<td>$99.00</td>
<td>Closed/Lost</td>
<td>Other</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SD User Enterprises, Inc</td>
<td>Tom Harrison</td>
<td>$1,600.00</td>
<td>Closed/Won</td>
<td>Email</td>
<td>5</td>
<td>2019-10-28 07:30 PM</td>
<td>2019-10-28 08:00 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Top of the Morning</td>
<td>Tom Johnson</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Table View**

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

- View important Opportunity 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 layout.
- Search, filter, and sort the information in each column.
- Click 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 to help sales members better visualize their pipeline.

In the Board view, manage and track 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 (by default these stages are setup: Needs Assessment, Value Presentation, Proposal/Quote, and Closed/Won or Closed/Lost).
• View how much revenue is predicted for each 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.
2. Complete the **Opportunity Details** section:
   - **Opportunity Name** (required)
   - **Primary Contact** (required)
   - **Account**: The Account associated with the new Opportunity.
   - **Owner**: The User who owns the Opportunity.
   - **Department**: The department of the owner.
   - **Amount**: The value of the proposed sale.
   - **Stage** (required): *Customizable*
     - **Needs Assessment**: The sales agent is still learning more about the prospect, their business needs, and their pain points with their existing product, as well as working to identify a product package to provide them.
     - **Value Presentation**: The sales agent moved to demonstrating solutions and presenting products based on the specifics identified during the previous stage.
     - **Proposal/Quote**: This stage varies widely from company to company, and may include things like delivering a quote or proposal.
     - **Closed Won/Lost**: As the sales process comes to a close, the sales agent asks the prospect to finalize the deal, which ends in either a win or loss of a sale.
   - **Source**: How did they hear about your company (Phone, Email, Web)?
   - **Expected Close Date**: This is great for more accurate pipeline predictions.
   - **Actual Close Date**: Celebration time.

3. Click **Create**.
Opportunity Workspace

Click on any Opportunity to view the Opportunity Workspace. This Workspace allows Users to easily view and edit Opportunity details, Relationships, Analytics, Interactions, and more. Click any tab at the top to view key information or add new elements without navigating out of the Workspace.
Overview Tab

By default, the **Overview** tab shows the Contact name, phone number, email, and shipping and billing addresses. Contacts and Accounts associated with the Opportunity also appear on the Overview tab.
The **Details** tab shows the potential value of the sale, the current sales stage, and more. Users can also view and edit the Contact and Account associated with the Opportunity.
### Phoenix Escape Rooms

#### Opportunity Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Name</td>
<td>Phoenix Escape Rooms</td>
</tr>
<tr>
<td>Primary Contact</td>
<td>Jake Smith</td>
</tr>
<tr>
<td>Account</td>
<td>Phoenix Escape Rooms</td>
</tr>
<tr>
<td>Owner</td>
<td><a href="mailto:kris.johnson@nextiva.com">kris.johnson@nextiva.com</a></td>
</tr>
<tr>
<td>Department</td>
<td>Sales</td>
</tr>
<tr>
<td>Amount</td>
<td>$250</td>
</tr>
<tr>
<td>Quoted Amount</td>
<td></td>
</tr>
<tr>
<td>Stage</td>
<td>Closed/Won</td>
</tr>
<tr>
<td>Source</td>
<td>Phone</td>
</tr>
<tr>
<td>Score</td>
<td>4</td>
</tr>
<tr>
<td>Probability</td>
<td>100</td>
</tr>
<tr>
<td>Expected Close Date</td>
<td></td>
</tr>
<tr>
<td>Actual Close Date</td>
<td></td>
</tr>
</tbody>
</table>

#### Details Tab

#### Related Tab
The **Related** tab displays all relationships associated with the Opportunity. For example, an Opportunity may have multiple contacts, which are setup as a relationship. Click **Choose relationships** and select: **Attachments, Contacts, or Products** from the drop-down menu.

**Related Tab**

To associate an existing Account with an Opportunity, for example, hover over the top-right corner above the table and click **Add**.

**Add/Create New Options**
Analytics Tab

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

- **Sentiment Trend** estimates how happy the customer is based on the most recent interactions. 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 there is a Case associated with an Account, the Account Activities tab will display all Cases related to the Opportunity. Users can sort Cases by last Created or 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.
Notes

Internal communication regarding a prospect or customer is often just as important as direct-to-customer interactions. Notes about a customer’s specific requests or limitations, or anything at all, will be logged and tied to the prospect throughout their relationship with your organization. This keeps all communications centralized and easy to reference or search.

**TIP:** Flag special or VIP notes to see them any time the Account or Contact is accessed.

Adding Notes

Add Notes associated with anything in Nextiva CRM. Just look for the **Interaction History**.

Click on one of these:
For example, let’s open an Account to view the Workspace and **Interaction History**.
Interaction History & New Note
Interacting via Email

Interact with potential prospects via email also within Interaction History.
Logging Interactions

Log inbound or outbound calls and any other communications.