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](http://www.nextiva.com), and click **Client Login** to log in to NextOS.
2. From the NextOS Home Page, select **CRM**.

![Welcome to NextOS!]

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.

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**.

2. Fill out the **New Account** form and click **Save**.
### New Account Form

#### Account Information

<table>
<thead>
<tr>
<th>ACCOUNT NAME</th>
<th>ACCOUNT OWNER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select...</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ACCOUNT NUMBER</th>
<th>PRIMARY CONTACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select...</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPERIENCE SCORE</th>
<th>INDUSTRY</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>EMPLOYEE COUNT</th>
<th>ACCOUNT VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select...</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WEBSITE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>

#### Contact Details

<table>
<thead>
<tr>
<th>EMAIL</th>
<th>FAX</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>PHONE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>+1</td>
<td></td>
</tr>
</tbody>
</table>

#### Address Information

<table>
<thead>
<tr>
<th>SHIPPING ADDRESS STREET 1</th>
<th>BILLING ADDRESS STREET 1</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>SHIPPING ADDRESS STREET 2</th>
<th>BILLING ADDRESS STREET 2</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>SHIPPING ADDRESS CITY</th>
<th>BILLING ADDRESS CITY</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>SHIPPING ADDRESS STATE</th>
<th>BILLING ADDRESS STATE</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>SHIPPING ADDRESS POSTAL CODE</th>
<th>BILLING ADDRESS POSTAL CODE</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>SHIPPING ADDRESS COUNTRY</th>
<th>BILLING ADDRESS COUNTRY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select...</td>
<td></td>
</tr>
</tbody>
</table>
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.
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](image-url)
Details Tab

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

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.
### Related Cases

<table>
<thead>
<tr>
<th>Case Number</th>
<th>Account Name</th>
<th>Case Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>UUB-1745406</td>
<td>ABC Cleaning</td>
<td>Kris Jacobson</td>
</tr>
<tr>
<td>WSK-5334768</td>
<td>ABC Cleaning</td>
<td>Kris Jacobson</td>
</tr>
</tbody>
</table>

### Related Contacts

<table>
<thead>
<tr>
<th>Contact Name</th>
<th>Contact Owner</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alexa Smith</td>
<td>Kris Jacobson</td>
<td><a href="mailto:Alexa.smith@abcclean.com">Alexa.smith@abcclean.com</a></td>
</tr>
</tbody>
</table>
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.
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.
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**.

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

## Contact Information

- **Contact Name**
- **Contact Owner**
- **Primary Of**
- **Type**
- **Preferred Name**
- **First Name**
- **Birthday**
- **Last Name**

## Contact Details

- **Home Phone**
- **Assistant**
- **Mobile Phone**
- **Assistant Phone**
- **Work Phone**
- **Do Not Call**
- **Email**
- **Do Not Email**
- **Fax**
- **Interaction Pref**

## Address Information

<table>
<thead>
<tr>
<th>Mailing Address Street 1</th>
<th>Billing Address Street 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mailing Address Street 2</td>
<td>Billing Address Street 2</td>
</tr>
</tbody>
</table>
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.
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.
Details Tab

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

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.
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.
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.
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**.
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.
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.
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 Image](image)

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 Image](image)

Please select related items to show

Use control on the top to show related information you need for work.
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.

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.
Case Inbox

The **Case Inbox** 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.

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.
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.

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 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**.

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](image)

**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.
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.
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.
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.

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.
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.
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**.
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.
- **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 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**.

![New Opportunity Form](image)
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.

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.
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.
## 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.
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.
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.
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.

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**.

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.

Details Tab

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

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

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.
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](image)

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.
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.
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.
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.
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**.

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**.
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.
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**.
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.

Once accepted, Users can instantly log the 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 a 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](image)

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.
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.
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 **Restore** from the drop-down list.
**Recycle Bin**

Items in the recycle bin are retained for 60 days and then permanently deleted.

![Recycle Bin Table]

**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.