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Getting started

Nextiva is putting the ways your customers want to interact with you like calls, texts, and emails in one place alongside your team collaboration tools like chat. Nextiva eliminates siloed communication channels by delivering one seamless experience so you can communicate confidently with your customers from anywhere. Instantly start or schedule a video meeting, send messages, share files, and more — all of which are accessible on the web and desktop version.

1. Logging in

From the NextOS home page, choose to download the desktop app or access the web version.

2. Downloading the desktop app

Click one of the links below to install on your desktop.

Download for Windows  Download for macOS

3. Import contacts

Quickly import your business contacts from Google or Office 365 to Nextiva. Click Contacts > Add Contact > Add multiple business contacts. Select Google Contacts or Office 365 and sign into your account. You can also choose to keep the contacts private or public to all teammates. Click Import contacts when ready.

4. Integrate your calendar

Integrate Nextiva with your Google or Outlook Calendar so you can manage and create calendar events directly from Nextiva. Click Calendar > Expand > Add a calendar. Choose your account and allow permission to sync with Nextiva.
Contacts

Click **Contacts** to view all saved business contacts and teammates. Teammates are other users on the same account. A business contact may be a customer or potential prospect. There are specific features only available for teammates, such as team presence and the ability to send and receive internal chat messages.

You can set business contacts to be public so all teammates can see the contact details, or you can set them private so only you can see the contact details. All public contacts can be edited and deleted by other users on the account. Whereas, private contacts can only be edited and deleted by the user who created the contact.

Hover over any contact to view contact details or click on any contact to view their full profile – including the entire conversation history.

**Adding contacts**

To manually add a contact, click **Contacts** > **Add contact** > **Add a business contact**.

Enter the contact details, and choose to make the contact private or shared. Click **Save**.

**Adding favorites**

Add contacts, teammates, and rooms as favorites so they are easily accessible.

Click the **Star** next to the contact or room.

**Adding notes to contacts**

Select **Add note** on the lower left of the contact's profile.

**Editing contacts**

Select the contact to view their profile and click the **ellipses** > **Edit contact**.

**Deleting contacts**

Select the contact to view their profile and click the **ellipses** > **Delete**.
Audio calls

Nextiva can replace the need for a physical desk phone or hardware – allowing you to quickly make and receive calls from your computer or tablet, for example, including the ability to transfer calls and attach notes to a call. You can also view and listen to voicemail messages directly from here.

Making an outbound call

Click the Phone 📞 at the top or click Plus ✚ on the top right and select Make a call. Enter the name or number and click Call ☎️.

You can also call contacts directly by selecting Call ☎️ from their profile.

Answering an inbound call

When receiving an inbound call, a call pop will display at the bottom right, with the options to Answer or Decline.

Transferring a call

While on an active call, click Transfer and enter the name or number and choose to blind or warm transfer or send the call to voicemail.

Active call control

While on an active call, you can perform the following actions:

- Hold/resume
- Mute/unmute
- Dial pad
- Add a note
- Additional controls, such as transfer.
Video calls

Collaborate one-on-one or with multiple participants via video. With just a few clicks, you can instantly meet “face-to-face” with teammates from anywhere. Nextiva supports up to 16 active video participants and up to 250 audio participants on the same call.

Below are all the different ways you can start a video call:

- Click Video ☰ from any teammate’s profile.
- Click Video ☰ on the right panel of any room.
- Click Plus 📈 at the top right and select Start a meeting now.

Click Start call when ready to use computer audio or choose to join the call using your phone audio. You can view all participants, including the option to invite more people on the right.

At the bottom of the screen are your video & host controls:

**Video controls**

- Mute/unmute
- Video camera controls
- Screen share
- Additional controls, such as video and audio settings.

**Host controls**

- Mute all participants
- Disable video for all participants
- Additional controls, such as the disable screen sharing and the ability to invite people.
Voicemail

To view and listen to voicemail messages from Nextiva, click on the message to view the voicemail transcription, or click Play to listen to the voicemail.

Messages

Send and respond to text messages using your Nextiva business phone number. In addition to text messaging, you can also instantly message teammates – including the ability to send and receive files and emojis.

Sending a new message

- To send an instant message to a teammate, click Message from any teammate's profile.

- To send a text message, click Plus on the top right and select Send a message. Enter the business contact’s name or number to send the message and enter your message.

Responding to a new message

- To respond to a new message, click on the message to view and respond.

- To send a file, click the Paperclip. Maximum file size for instant messaging is 100 MB and texting is 1 MB.
Meetings

Schedule and manage your meetings and calendar events directly using the built-in calendar, Google Calendar, or Outlook. Under the calendar view, click on any meeting to respond to meeting invites – including the ability to view participants, the meeting link, and meeting ID number.

Creating a meeting

Below are all the different ways you can create meetings:

- Click Plus on the top right corner, and select Schedule a meeting.
- Click Plus on the top right corner on the top right corner of the calendar view.
- Click on any time slot in any calendar event.

Under Create a meeting, enter a name, choose a date and time, and the recurrence of the meeting. Select the calendar to use, such Google Calendar or Outlook.

Search for teammates name or enter the email address of each teammate you would like to invite to the meeting. Click More options to add co-hosts and adjust additional meeting settings. Assign co-hosts so when you end the meeting it doesn’t end the meeting for all participants. You can also assign a co-host when scheduling a meeting prior to the meeting time. Click Create.
Starting a meeting

In addition to scheduling meetings, you can instantly start a meeting using Nextiva. Click **Plus** on the top right, and select **Start a meeting**. Choose your audio and video preferences, and click **Start now**.

**NOTE:** There is also an option to dial into the bridge, and skip the computer audio.

To invite participants, click **Invite** under the participants list or from the call controls. You can type to add participants, or copy the invitation to send via instant message, for example.

Joining a meeting

Click **Join** under the meeting details or from the meeting email invite or link. You can also join a meeting by dialing in and entering the meeting ID, if provided by the host or co-host.

Editing a meeting

Click on the meeting and select **Edit**.

Deleting a meeting

To delete an existing meeting and cancel the meeting for all invited participants, click on the meeting, and select **Delete > Yes > Delete**.
Rooms

Create rooms to collaborate and share ideas with multiple teammates. Quickly send messages or start a group video call with just a click of a button.

To create a new room, click Plus next to Rooms under Team collaboration. Enter a name and description for the new room. You can also choose to make the room private so only users you invite can join.

NOTE: Once a room is made private, it can never be made public again.

Click Create room. Next, choose the teammates you would like to invite and click Add members.

You can view all room details on the right menu, including the option to edit room details. You can also add members from here and set room preferences, such as setting the room private and muting notifications.

Click Video to start a group video call.

Click Participants to view all members in the room.

Click Paper clip to view only the files shared in the room.

Conversations

Conversations are great for quick conversations with teammates and are best thought of as a temporary place to meet. Click Plus next to conversations to chat directly with a teammate 1:1 or with a group of up to 10 teammates.
Email

Integrate your business email so you can quickly view and respond to emails directly from the conversation thread – giving you Amazing Service® and the reliability of Nextiva.

Integrating your email

Under the Emails channel, select Yes, connect my email now!. Under all integrations, click Available integrations and choose to integrate with Outlook – Gmail coming soon! Once you sign into your account, it will automatically start syncing with Nextiva.

**NOTE:** All emails will be imported to Nextiva and are set to private and only visible to you by default.

Sending emails

To send a new email, click the Plus icon on the top right and select Compose an email.

Enter the name(s) or email addresses of all recipients you would like to send the email to.

At the top you can add Cc or Bcc recipients and change the from address, if multiple accounts are connected.

You can also format the text and include hyperlinks, files, and emoji’s at the bottom of the message. Enter your message and click Send when ready.

Responding to emails

Under the conversation view, hover over any message and choose to Reply, Reply all or Forward.

Enter your message and click Send when ready. You can also format the text and include hyperlinks, files, and emoji’s at the bottom of the message.

**NOTE:** To delete an email, click the Ellipses > Delete.
Files

Easily access all files and links shared – click the Paper clip on the right panel to view all shared files.

Choose which type of file, such as attachments, recordings, and links, or filter by files shared with you or files you shared. Choose different views, such as list view and gallery view.

Hover over any file and click on the ellipses to view the actions, such as download, share, and delete.

Team presence

Adjust availability settings or quickly check the status of other teammates via team presence.

Choose to automatically show your presence or manually change your presence – including the option to add a message to show under your status.
Settings

Instantly set up and manage your profile details, notification preferences, and Nextiva Voice settings. Administrators can also quickly access the NextOS administration settings, such as user and licensing details and billing information.

Profile settings

Under Profile, you can edit your personal information – including your username, password, and security PIN. The security PIN is required when requesting assistance from Nextiva.

Notifications

The Notifications icon on the top right shows the total number of new or unseen notifications. You can choose to not display the total number of notifications, and instead just a red dot indicating you have a new notification.

Here you can see notifications for missed calls, voicemails, messages, meetings, and more.

Click Clear all to remove all notifications. You can also pause notifications for a specified time by clicking the Do Not Disturb icon.
Nextiva Voice settings

To set up and manage your Nextiva Voice settings, such as voicemail and call forwarding, click your avatar on the top right and select My settings > Calls.

Voicemail

Under voicemail, choose to instantly record a new greeting or upload an existing greeting file.

To record a new greeting, click **New greeting > Record**.

When done recording your voicemail greeting, you can listen to the greeting, re-record, or download the audio file. When ready, enter a name and click **Save**.

Under voicemail options, you can set the total number of rings before voicemail picks up, update your voicemail PIN (default PIN is 0000), and set up voicemail to email from here. Click **Save**.

Under **Advanced settings**, you can set up which type of calls should automatically go to voicemail, your alternate busy greeting, storage preferences, recording settings, and more.

Mobility

Set up and manage your mobile settings, such as Nextiva Anywhere, Remote Office, and simultaneous ring so you can receive calls while on the go.

Nextiva Anywhere

**Not always at your desk or in the office?** Nextiva Anywhere allows you to fully utilize Nextiva voice with any phone, such as your home or cell phone – allowing you to make and receive business calls from anywhere, at any time.

To set up Nextiva Anywhere, click **Add phone number**, type in a brief description and enter the number you want your calls to forward to, such as a mobile phone. Choose to require answer confirmation by selecting any key on the dial pad to accept the incoming call.

To make outgoing calls using the Nexiva Anywhere device, you must enter the phone number of the device you are using. Click **Add**.

Under **Conditions**, you can choose specific times for Nextiva Anywhere. For example, you may only want your business calls to forward to your cell phone between a specific time period. Select the schedule and which calls to route during the specified schedule. Click **Add**.
Remote office

Need to temporarily receive calls to a different phone? Remote office allows you to substitute a different phone as your business phone by directing all incoming calls to this device. To make calls from your remote office location, you must use some sort of call control tool such as a dialer or call manager.

To set up remote office, click Add phone number and enter the number you want your calls to forward to.

Simultaneous ring

Want to ring multiple devices at once when receiving a call? Simultaneous ring allows you to add up to 10 additional phone numbers or extensions. These may be other phones in the office or remote phones, such as mobile phones.

To set up simultaneous ring, click Add phone number and enter the numbers you want your calls to also ring when receiving a call.

Under Simultaneous ring condition, you can choose a specific schedule to ring the additional phones. For example, you may only want your business calls to forward to your home office phone between a specific time period. Select the schedule or choose to not use simultaneous ring during the selected schedule. Choose to route all calls or only certain phone numbers, such as private and unavailable numbers. Click Add.

Call forwarding

Nextiva forwarding allows you to redirect calls to another number or extension, based on defined conditions, such as when a call goes unanswered or when you’re busy on the other line.

Always

Out of the office for the day? Forward all your calls to a different phone number, such as your mobile phone, no matter what. Enter the phone number, and click Save. Make sure to click the toggle to the right to enable. To disable, click the toggle again.

Unanswered

Can’t get to the phone in time? Forward incoming calls to a different number when not answered within a specified number of rings. Enter the phone number, and choose the number of rings before forwarding. Click Save. Make sure to click the toggle to the right to enable. To disable, click the toggle again.
Unreachable

**Power or the internet outage?** Automatically forward incoming calls to a different number when your phone becomes unavailable. This is an essential safety net. Enter the phone number, and click **Save**. Make sure to click the toggle to the right to enable. To disable, click the toggle again.

Busy

**Busy on the phone?** Forward incoming calls to a different number when you are already on a call. Enter the phone number, and click **Save**. Make sure to click the toggle to the right to enable. To disable, click the toggle again.

Call routing

Enable and disable call waiting, do not disturb, and anonymous call rejection, which rejects callers who are blocking their outbound phone number.

Outgoing calls

Under outgoing calls, choose to block your caller ID and enable/disable automatic call back, which allows you to automatically receive a callback if another user is currently on a call.

Emergency location

Under emergency locations, you can add and manage your E911 emergency location details. This is important if working remotely to be sure 911 teams are always able to find you quickly.

Call center

If you have a call center license assigned, you can manage your queue settings, such as your queue status (available/unavailable) and outbound number. You can also launch the call center dashboard, where applicable, and manage which call queue you are signed into, if allowed by admin.