nextiva

Welcome to Nextiva Service Delivery!

Starter Experience



Released Winter 2024

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 service delivery 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 Service Delivery team. Welcome to Nextiva!

Kind Regards,

Ken McMahon



Ken McMahon
Chief Customer Officer



What's already in the works

Here's what's already happening and what you can expect.

Receiving shipped equipment

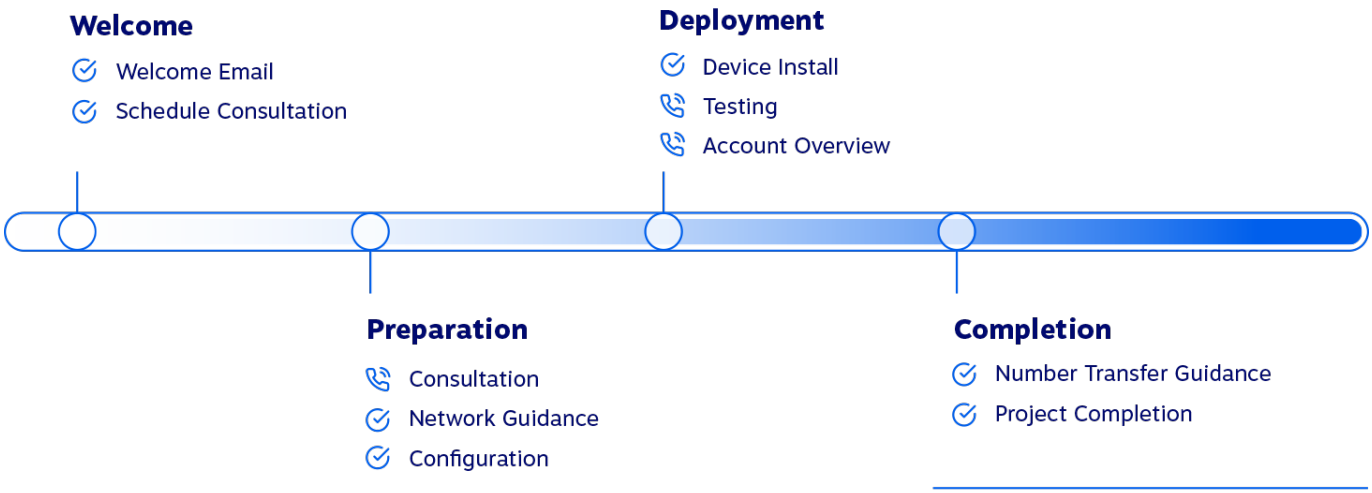
- Devices purchased or rented from Nextiva will ship once payment is processed.
- Your order may ship via FedEx prior to your first contact with the Service Delivery team. Please securely store your shipment until you are ready to unbox and install the equipment.
- If you're bringing your own equipment,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

Providing roles and contacts

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

Service Delivery in four stages

The Starter experience is quick deployment of your new Nextiva services, tailored to your business.
This is a general process, your experience may differ depending upon your unique needs.
The project is expected to be completed within 10 business days.



Number Transfer process may continue after project completion.

Introducing the Nextiva Service Delivery Team



Your Nextiva Service Delivery Agent

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 assists with scheduling your consultation.

Technicians

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

On-site Support

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

Specialists

Your Service Delivery Agent will coordinate with specialists when needed.

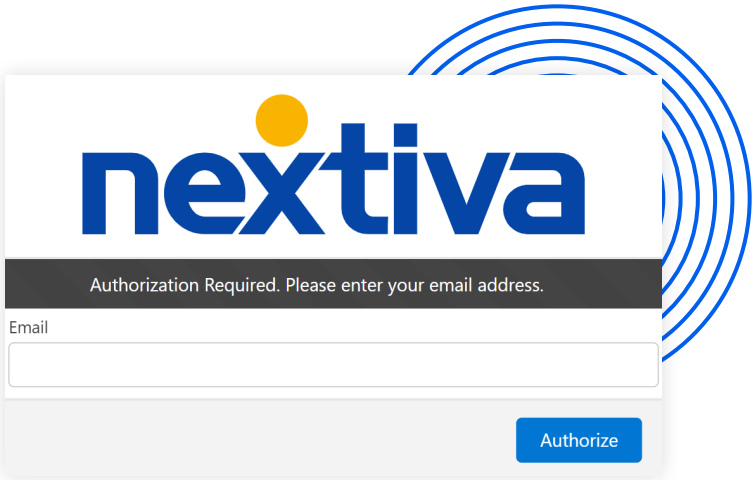
Nextiva Project Insights

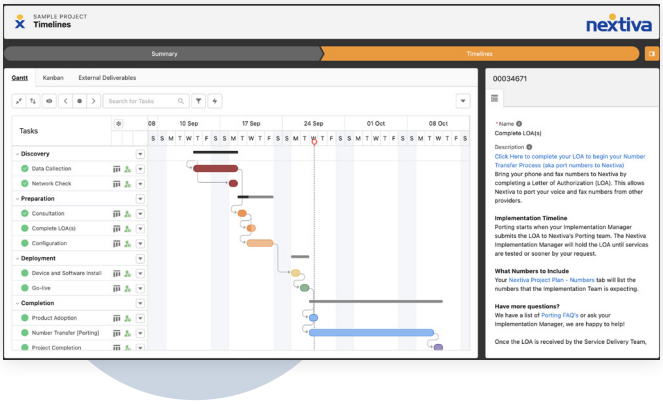
The Service Delivery Team uses Nextiva Project Insights software to keep a close eye on your setup progress. It's all about ensuring that your transition to Nextiva is as smooth as possible.

As you embark on your service delivery journey, here are three essential things to know about Nextiva Project Insights:

Exclusive Access

Only individuals added as stakeholders can access Nextiva Project Insights. This ensures a secure and collaborative environment for your project. Your Service Delivery team will provide a unique URL for you to access your project records.



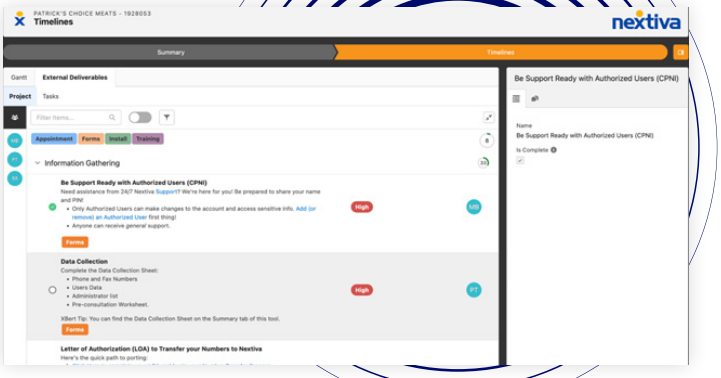


Project Timeline

Keep track of the project's progress with our intuitive timeline. It outlines the order of tasks and their expected duration, so you always know what's happening next.

External Deliverables

The External Deliverables screen empowers you by offering a comprehensive view of tasks assigned by our Nextiva team.



Setting expectations: When we need your help

The paperwork

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, complete a form, or provide it directly to your Service Delivery Agent. Learn more here.

Data Collection

- The first step is to gather information about your company and business. You can start now by completing the Data Collection Template. The Service Delivery team can answer any questions you have.

Spoofing and Number Transfer [Porting]

- We need a completed Letter of Authorization (LOA) to move your voice and fax numbers to Nextiva.

- If you want to show your business number on the outbound caller ID before porting completes, you may submit a spoofing form.

- Spoofing is optional and requires full copy of your most recent bill from current provider to proof number ownership. The number you spoof should be listed on the bill.



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 fl w and feature use cases.

Implement Network Guidelines

We highly recommend implementing **Nextiva's Network Guidelines** as your network setup is directly impacting system performance.

Should any issues arise, your Service Delivery manager can schedule an appointment to review your network and provide the guidance.

We rely on you to account for all network equipment.

Download software and participate in online training

Nextiva offers on-demand training and resources to cover the basics. Get started by going to **Nextiva's Video Hub** for tutorial videos or check our **Webinars page.**

In person training is available with Nextiva's Solutions Specialists 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 upload your audio files directly on the portal, or ask your Service Delivery Agent to help.
- **Contract professional voice talent** to record your custom branded messages. Nextiva has partnered with **SnapRecordings** to provide you with a variety of options with industry leading talent.

Deployment

Download NextivaONE

- Provide your teams with a single application to communicate confidently, delight customers, andwork smarter. **Click Here** to get started.

Install your devices

- Your Service Delivery Agentwill help you determine the best method to deploy equipment. You may be able to plug in the devices without obstacles, you may need to swap devices, or install in-line with existing equipment (see **daisy-chaining**).

- If you're bringing your own devices, contact the previous provider to ensure that you have a passcode to the administration settings of your phone and that the equipment is unlocked and able to be reprogrammed to a new provider.

Participate in testing

- The Nextiva Solutions Delivery Agent will help to schedule your testing appointment, to ensure that your hardware, call flow and features are functioning properly.

- If you purchased On-site services your Operations Manager will still participate in testing.

Ways to go live:

- If using Nextiva telephone numbers, you may choose to begin advertising and using the numbers once the testing is complete.

- To go live before the number transfer is complete, you may forward calls to the Nextiva temporary numbers provided by your Service Delivery Agent. An authorized representative on the previous service provider's account must request the call forwarding (multi-path call forwarding to be exact). Or, if your previous provider has provided an online portal, you may be able to enable forwarding yourself.

- If you are going live when the number transfer is completed, it is recommended to test the phone system prior to the port date and leave the phones connected. On the day of your numbers porting, calls will begin to route to the Nextiva service.

- Your Service Delivery Agent can assist with completing the Number Transfer document. The Nextiva Porting Team will communicate with you directly to port your numbers.

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 Service Delivery team can help. We can talk in real-time on your Consultation. For urgent matters, simply reply to your welcome email or contact servicedelivery@nextiva.com.

Additional services provided by Nextiva

Solutions Specialists

The following services require subject matter experts outside the scope of standard service delivery. Contracting with Nextiva's Solutions Delivery Consultants is necessary for these custom configurations and incurs an additional cost.

- **Five9**: The Nextiva and Five9 integration helps connect your contact center to the rest of the business, ensuring that your agents can access the right resources in a timely manner. Nextiva connects seamlessly with the Five9 platform via a SIP connection.
- **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.
- **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, such as Unity CC Media Streams and Akixi reporting.

On-Site Services

Standard service delivery 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 Advanced.

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**

