Welcome to Nextiva!

We are honored that you have chosen us as your new phone provider. We look forward to providing you with secure, reliable phone service that will help your business flourish.

This guide was designed to help office managers and administrators navigate the new Nextiva phone system. You will find instructions for how to do common tasks for your company’s system and assist your fellow employees with their device setup.

If you have other questions about your Nextiva phone system, please visit our online Support Center at http://www.nextiva.com/support. Here, you will find additional setup guides, step-by-step video tutorials, and troubleshooting assistance.

Or, contact us at: support@nextiva.com  
800.285.7995

Office Hours:  
Monday – Friday: 5:00am – 6:00pm AZ Time  
Saturday: 9:00am – 1:00pm AZ Time

Sincerely,  
The Nextiva Team
NextOS Portal

From the NextOS Portal, you will be able to add employees, assign devices, change your billing information, and access the advanced administration login to adjust settings and features.

To begin, go to www.nextiva.com. Click Customer Login at the top right of the screen. Your account username and password were emailed to you when you accepted your initial quote from Nextiva. After you sign in with your credentials, you will be prompted to create a new password. Once you have created a new password, you will be logged into the NextOS Portal.

Adding an Employee

1. To add an employee, click Sites & Employees, then click Employees.

2. Click Create New Employee located at the top right.

3. You will need to create a User ID for the employee you are adding. As you are completing the information, make sure you are choosing the correct time zone, phone number (if applicable), extension (required), and address for each employee. After you have entered each individual user’s information, press Continue. This username will allow your employee to go to the Customer Portal (cp.nextiva.com) and log in to their individual account. Enter your employees’ email addresses so they can be sent their login information.

4. After entering an employee’s information, you will be prompted to assign a device to the employee. If you have already added your phones in the device section, you can select it from the drop down menu. If you have not yet added your phones, view the Adding Devices instructions on the next page. You can then assign the device at a later time by editing the user.

Editing Employee

As your account administrator, you can edit users’ contact information, reset their passwords, change their phone numbers, extensions, and assign devices.

1. To edit your users, access the Employees section under Sites & Employees. You will see a list of your current employees.

2. Select Edit next to the employee’s name that you wish to edit. Here you are able to edit the user’s ID, name, email, phone number, and extension. You are also able to reset the user’s password by clicking the Reset Password button. The user will receive an email with instructions.
NextOS Portal

Adding a Device

1. Under Devices on the left panel, select **View & Edit Devices**.

2. Click **Add New Device**. If you have purchased new phones from Nextiva, the device(s) will display automatically. If you are using your existing device(s), click **Bring Your Own Device**.

3. On the drop down menu, select the Device Type that matches your phone model. To find your phone’s Mac Address, locate the number on the back or bottom of your device. Once the Mac address is entered, click **Continue**.

Assigning a device

1. To edit your users, access the **Employees** section under **Sites & Employees**. You will see a list of your current employees.

2. Select **Edit** next to the employee’s name that you wish to edit.

3. To assign a device to the employee, click on **Assign New Device** under the Assigned Devices section. Select the device and assign it to the user. Reboot the device to display the new extension.

Billing

As your account administrator, you are able to adjust and explore many billing options from your NextOS Portal, such as view your monthly payment amount and due date, edit your credit card information, review your billing history, and keep track of any overage expenses.

1. To view your current bill, click **Account Payment** under the **Billing** section on the left panel. You are able to see your next payment date and the amount due.

2. To view your payment history, click on **Billing History** under the **Billing** section on the left panel. You can search through all of your prior bills by adjusting the date range.

3. To update the credit card or billing address on your file, click **Manage Credit Card** under the **Billing** section on the left panel. Click **Add New Credit Card** on the top right to update the credit card on file.
Group Control Panel

Your Group Control Panel gives you exclusive access to your advance administrator controls, such as setting your auto attendant, programming your hunt groups, and scheduling your after-hours messaging.

To access your Group Control Panel, click on Sites & Employees from the NextOS Portal left panel. Under Admin Login, select Login. A new page will open that says Group on the top left corner. You are now in the Group Control Panel.

Schedule Set Up

When creating schedules, you should think about the Hunt Groups, Auto Attendant, and Call Forwarding options that you may want to program.

For example, you may want to create an after-hours schedule from 5:00pm until 8:00am on weekdays, and a weekend schedule from Friday afternoons until Monday mornings. If you have a holiday schedule that you would like to run from Christmas Eve until the day after Christmas, you can program the schedule to start at 5:00pm on 12/24 and end at 8:00am on 12/26.

1. From the Basic Profile on your Group Control Panel, click Schedules.

2. On the next page, click Add. Type the name of the schedule that you are creating (ex: Business Hours), and select the Schedule Type. Click OK.

3. To specify the schedule time, click Edit, and then click Add on the following screen.

4. Create the event information by entering an Event Name, Start/End Dates and Start/End Times. Decide on your Recurrence Pattern and click OK.

Hunt Groups

To group employees’ extensions together into departments or specific groups, you can program your Hunt Groups. After you program your Hunt Groups, we strongly suggest testing them to ensure they are routing correctly.

1. From the left panel on your Group Control Panel, click Services. Select Hunt Group.

2. Click Add to program a new Hunt Group. Complete the entry fields in the top section. You can choose how you want incoming calls to “hunt” for employees, as well as decide how to proceed if no one is available to answer a call. You may want to forward these calls to a company voicemail or external phone number.
Hunt Groups cont.

3. After selecting your routing paths, you are ready to add employees. In the Search Criteria area, click Search. All of your employees’ names will appear in the Available Users field. Highlight the employees who are a member of that Hunt Group and click Add> to move them to the Assigned Users field. If you are using a circular or regular calling pattern, make certain to put your employees in the order which you would like the phone to ring. Press OK.

4. To access a Hunt Group’s profile, click on its name. From here, click Addresses and assign one of the available phone numbers or extensions to the hunt group.

Auto Attendant

The Auto Attendant feature greets your callers with an automated message that lets them choose the person or department they are trying to reach. After you program your Auto Attendants, we strongly suggest testing them to ensure they are working correctly.

1. From the left panel on your Group Control Panel, click Services. Select Auto Attendant.

2. Click Add to program a new Auto Attendant. Complete the entry fields and click OK.

3. On the Business Hours Menu screen, you can upload your personal greeting and set up your callers’ transfer options. Once you have programmed your routing selections, click OK. The key that you program will correspond to the number on your phone that your callers select. The action will be the result of that selection. For example, you may program Key 0 to transfer to the Operator, and type the Operator’s extension in the Phone Number box.

4. On the After Hours menu, you can select the Auto Attendant settings for when your employees are out of the office.

You can choose to forward all (or some) after-hours incoming calls to a voicemail. To do this, choose a number, label it Voicemail in the description, and select Transfer Without Prompt. In the Phone Number box, type *55 and the extension. This is the option you should also use for the Operator.
Call Features for Users

As the administrator of your account, you are able to set up your employees’ Nextiva account features for them. You have the ability to create schedules specifically for each employee, adjust features, and change passwords.

To access these features, click on **Sites & Employees** from the NextOS Portal left panel. Click **Employees** and locate the employee whose account you wish to update. Select **Login** next to their name, and you will enter their Control Panel.

**Call Forwarding**

Call Forwarding will send incoming calls to a secondary number as designated by the settings. We recommend testing these features after they are programmed to ensure they are working correctly. If the feature does not work correctly, disable the feature and check to see if you have turned on a Call Forwarding option that supersedes the option you are trying to add.

1. Once you’re in the employee’s Control Panel, select **Incoming Calls** on the left panel. Decide which Call Forwarding option you want to edit based on the employee’s needs. The most common setup for Call Forwarding is **Call Forwarding Not Reachable**. This feature will forward calls to an external phone or mobile device if the Internet or power go out in your office.

2. After selecting the Call Forwarding option that the employee needs, turn it **On** and enter the additional numbers as needed.

**Voicemail**

1. To change the voicemail PIN for an employee, click on **Passwords** under the Basic section on the main page of the employee’s Control Panel. Enter the 4 digit PIN into the current password field and a new 4 digit PIN into the new password fields, then click **Apply**.

2. For additional voicemail options, click on **Messages** on the left panel. Under the Basic column, select **Voice Management**. Here you can adjust the employee’s voicemail settings, such as forwarding messages to the user’s email account in the form of an audio file.

3. Once you have adjusted the voicemail to the user’s preferences, click **Apply** then press **OK**. We suggest you test these features to confirm they are working properly.
Troubleshooting

Bandwidth Requirement: Nextiva’s phones require approximately .1 MBPs upload/download speed in order to ensure that calls can be connected without any quality issues. If your phones are experiencing choppy, check your connection to make sure your bandwidth is large enough for the number of phones in your office. Keep in mind that computers and other network devices are also utilizing your bandwidth.

Firewall: If you are using a firewall, you may need to ask your IT personnel to allow traffic from IP addresses from 208.73.144.71. This is the IP address that your phones connect to when they send and receive calls.

For more step-by-step guide and additional information visit our website: nextiva.com/support

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