Nextiva voice basic settings

Admin guide

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Getting started

Manage all NextOS voice settings from one dashboard, making it easy to manage employee and device details at any time.

Logging in

Visit Nextiva.com, then click **Login** or navigate to authenticate.nextiva.com.

Your Nextiva username is the email address tied to your NextOS user. If you forget your username or password, use these links:

Forgot Username? | Forgot Password?

Once logged into the platform, click the initials or avatar near the top right of the page. Choose **Administration Tools**. If you don't have this option, contact the account administrator.

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Sign in

| Username |

| Password | 👁 |

Sign in

By clicking "Sign in", I agree that I have read and accept the **Nextiva Terms & Conditions.**

Forgot Username? | Forgot Password?

Welcome back, Anastasia (3407070)

Choose a profile 3 accounts total

L

Learning Voice
learningvoice.nextos.com
📞 3555069
Edit

N

Nextiva
testiam.nextos.com
📞 3516828
Edit

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Users

Manage all user details, such as role, team(s), licenses, and more. From the NextOS admin home page, click **Users** to create and manage all NextOS users.

Creating new users

Click **Create users** > enter the user's information > **Add License** > **Create**. The new user's login credentials are automatically sent to the email provided.

Create users   ✕

Add a user
Add a new user to your Nextiva account by sending them an email.

FIRST NAME

LAST NAME

EMAIL (USER ID) ❓

ROLE ❓

PRIMARY TEAM ❓

LOCATION (optional)

TIME ZONE (optional)

Licenses

ⓘ **Add licenses.** Add license for this user, so they can have access to this platform and get started.

⊕ Add license

Roles (optional)

Roles limit user access to specified areas of NextOS.

Admins can create and manage users, roles, and settings by default. Users can only edit their own voice settings. Click **Roles & Permissions** on the left menu to create or manage roles and permissions.

Primary team

Assign a primary team to group users together based on job responsibilities.

You can later direct calls to these teams. Assign a team when creating a user. You can also manage and create teams in the left menu under **Teams**.

Licenses

Add various licenses, providing users access to specific services, such as Nextiva Voice.

Make sure to assign a license for each voice user. Admins don't require a voice license unless they need phone service as well.

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Editing users

Edit user details, including resetting passwords. Hover over a user to reveal the **Actions** menu.

Click the **Actions** drop-down > **Edit Profile** > **Save**.

Deactivating users

Select the checkbox next to the user > **Deactivate** > **Deactivate**.

Reactivating users

Click the **Gear** > X to show inactive users.

Select the checkbox next to the user > **Reactivate**.

Voice settings

Manage all essential user voice settings, such as phone numbers, devices, voicemail, emergency locations, and business hours from one place.

Select **Users** > **Actions** > **Voice Setup** or **Voice Settings** if the user is already set up with voice.

Phone number

Assign a phone number, extension, and call forward unreachable number. Call forward unreachable allows you to receive calls in the event your Nextiva phone disconnects from the internet.

Add additional phone numbers or extensions by clicking **Add Number**.

You can also choose a ringtone to help identify the number called based on a particular tone or pattern.

Phone

Add a phone by choosing between the **Available phones** or by adding a **New phone**. To add a new phone, **Choose a phone** > enter MAC address > **Save**.

Set the voicemail greeting (optional)
Record or upload a new greeting. Don't worry, if you skip this Liam can add it later.
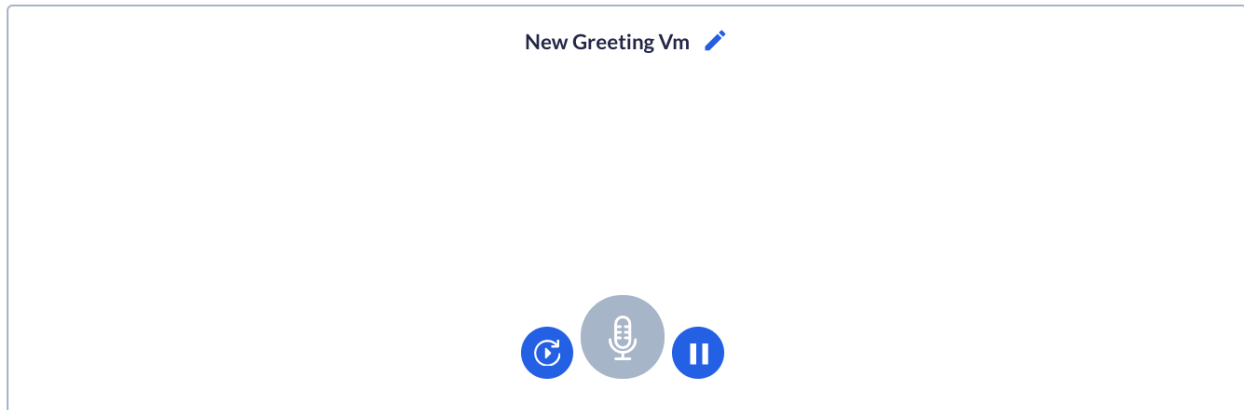
New Greeting Vm ✏

Upload existing greeting   Record new greeting

Voicemail

Adjust user voicemail settings, such as the voicemail PIN, greeting, the number of rings before voicemail picks up, and voicemail to email.

Click **Voicemail (advanced)** to configure the busy greeting, storage options, and more.

Users can also sign in and set up their voicemail preferences or dial *86 from their Nextiva App or device.

Emergency location

The emergency location is the address that the emergency dispatcher sees in the event the user places an emergency call. If users work remotely, it's recommended to enter the user's home address.

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Business hours

Set up a schedule to route calls based on the day and time. For example, add lunch breaks and holidays, so all incoming calls during those times forward to voicemail or an emergency line.

Click **Add new hours** > enter a name and select the time zone. Choose to use the same hours Monday – Friday or add weekend hours. Adjust the hours using the sliders and add breaks by clicking the **Plus** sign under Break. Add dates the business is closed, such as a federal holiday, by clicking **Add Holiday**.

Business Hours   ✕

NAME

Hannah Brown's Schedule

Regular hours

☐ Use the same hours Monday - Friday (weekends closed)

Day	Open		Close	Break
☑ MON	9:00 AM		5:00 PM	⊕
Break	12:00 PM		1:00 PM	remove
☑ TUE	9:00 AM		5:00 PM	⊕
Break	12:00 PM		1:00 PM	remove
☑ WED	9:00 AM		5:00 PM	⊕
Break	12:00 PM		1:00 PM	remove
☑ THU	9:00 AM		5:00 PM	⊕
Break	12:00 PM		1:00 PM	remove
☑ FRI	8:30 AM		4:30 PM	⊕
Break	11:30 AM		12:30 PM	remove
☐ SAT	**Closed**			
☐ SUN	**Closed**			

☐ Always open (24 hours, 7 days)

Holidays

◉ U.S. Federal holidays   ○ Specific date   ○ Custom date

All Federal U.S. Holidays   ▼

[Cancel]   [Save]

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Call flows

Set up a menu for callers, and customize the call flow that best fits your business needs. Route calls based on set days and times, specify where they get routed, and what happens if the call goes unanswered.

From the admin home page, select **Communications** > **Phone Systems** > **Call flows**.

Or from the left menu, select **Voice** > **Call Flows**

Creating a new call flow

Select **Create New Flow** > **Start from scratch**. Edit the name on the top right.

Click the Phone > select a phone number > Save & Continue. This number is typically the main phone number or a direct number for a specific department.

Click **Add action**, and choose one of the below options.
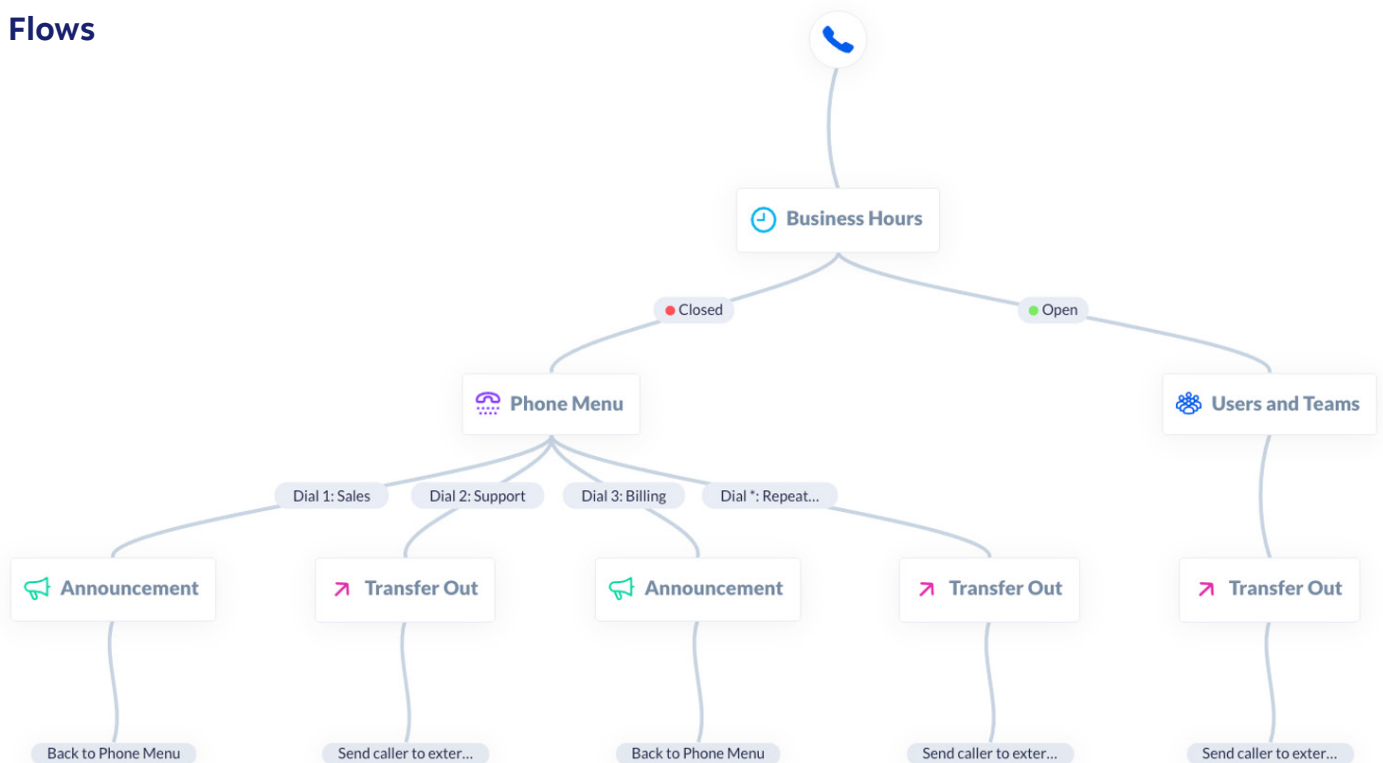
Call flow options

Announcement

Upload or record an announcement for callers to hear, such as monthly specials or business location details.

Users and Teams

Route calls directly to the appropriate user or team.

Phone Menu ❓

Upload or record a custom greeting with options for callers to hear, such as press 1 for sales, 2 for support, 3 for billing, etc.

Voicemail

Route calls to voicemail when needed, such as during after-hours or when the call is unanswered.

Transfer Out

Transfer calls to any external phone number, such as an emergency line during after hours.

Dial by Extension

Allow callers to contact a user or team directly by entering their extension.

Call Flow

Transfer calls to another call flow. Only live call flows will show in the drop-down.

Dial by Name

Allow callers to contact a user directly by entering the first few letters of their first name.

Repeat this process until all call flow branches reach an ending point such as a voicemail box or transfer out. Click **Go Live** to activate the call flow.

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