# Nextiva Social Management

**Version 1.1**

nextiva

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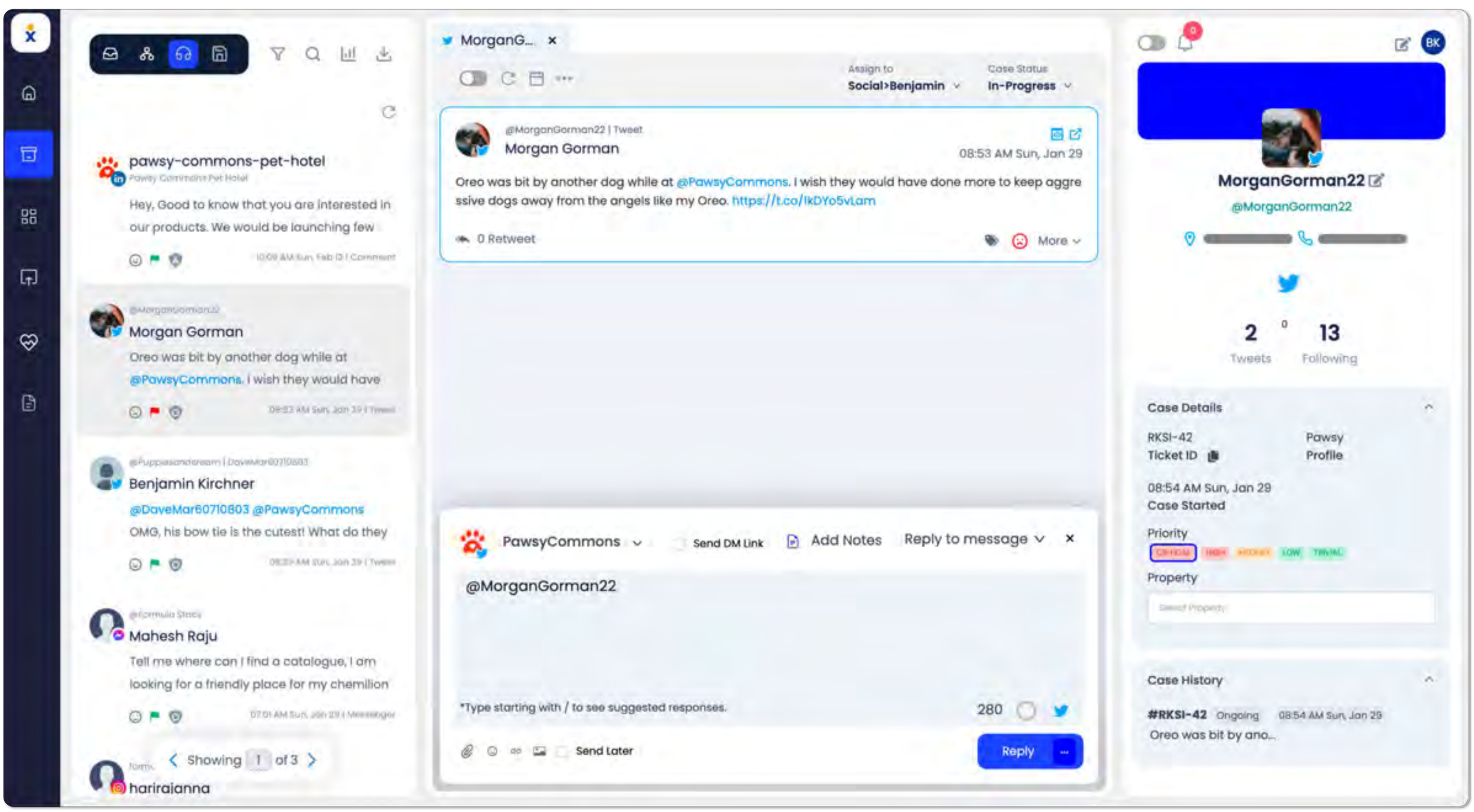
# Getting started

Manage all your social media from one place. Nextiva social and reputation management is the easiest way to monitor all your social media channels, engage with customers in real-time, and analyze social media performance.

Instantly know what people are saying about your company across all major social media channels, including YouTube, Twitter, Facebook, Instagram, Tumblr, and more. You can also create content on your time and schedule it to publish when your audience is most active.



# Logging in

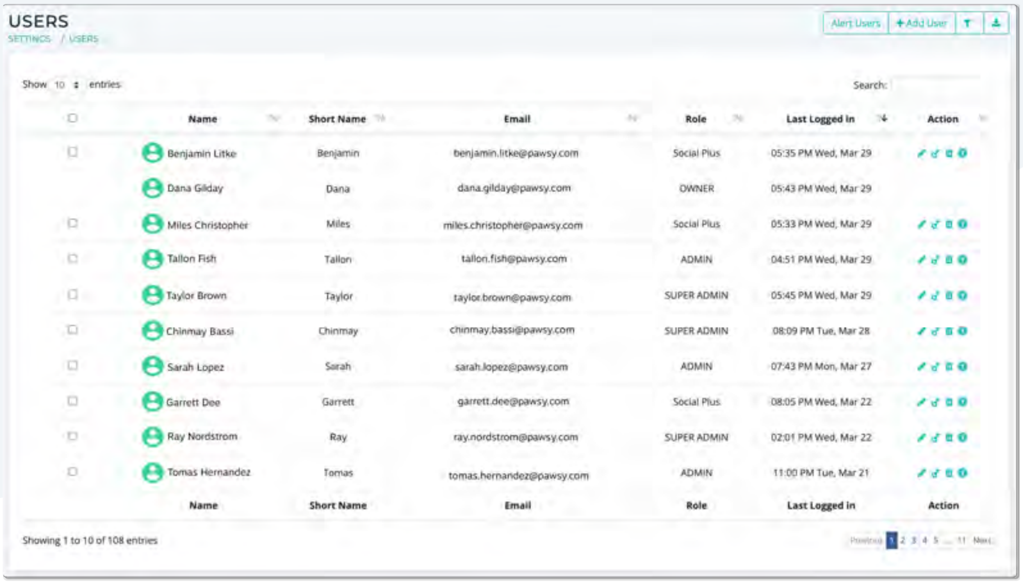
To log into the Nextiva Social Management portal, visit nextiva.simplify360.com or click here.

# Managing users

Invite teammates and staff to help manage and create custom social media content, including the ability to instantly reply to posts on social media – all from one place.

## Adding users

From the main dashboard, click **Settings** > **Users** > **+ Add user** and enter the required information, including the user's Role Type (Admin, Member, Viewer) and timezone. Click **Save**.




## Resetting passwords

As an administrator you can always change user's passwords, or anyone can reset their password via the Forgot Password option from the main login page. To reset a user's password, click **Change Password** under Users and enter the new password. Click **Update**.

## Deleting users

Click the check-box next to the user(s) and select **Delete Users** at the top. Click **OK** to confirm.

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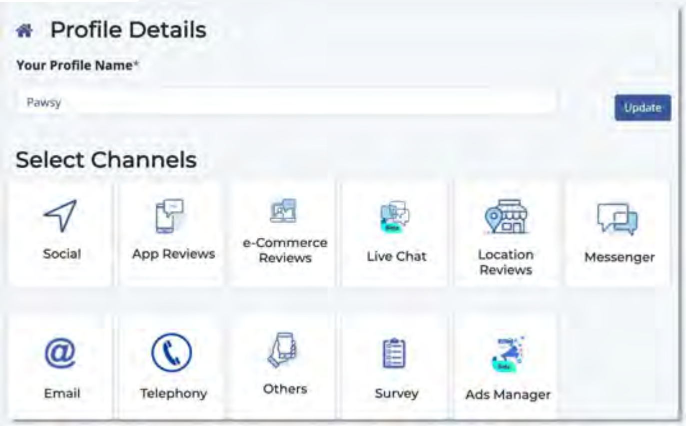



# Setting up profiles

From the home screen, click the **Menu** icon on the top left and select **Settings** > **Profile Management**.

Click **+ Create Profile** and enter a name for the new profile. Click **Create**.

### Sharing profile access

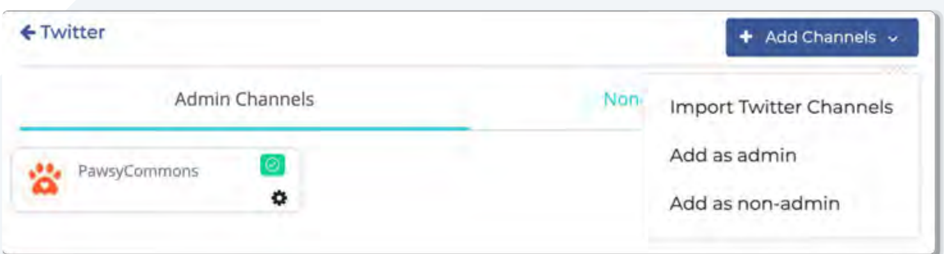
Under **Profile Management**, click the **Pencil** icon to the right of the profile and select **Share** under Others.

Search for the user and select the radio button under the Access and click **Update**.

# Integrating social media channels

Under the profile settings, select**Social** and select from the supported social media platforms (Twitter, Facebook, YouTube, etc.).

Click **Add Channels** and select to **Add as Admin**. Enter your account credentials and follow the prompts to complete the integration.




You can also add channels as Non-admin channels to keep track of other influencer's or competitors, for example.

# Workbaskets

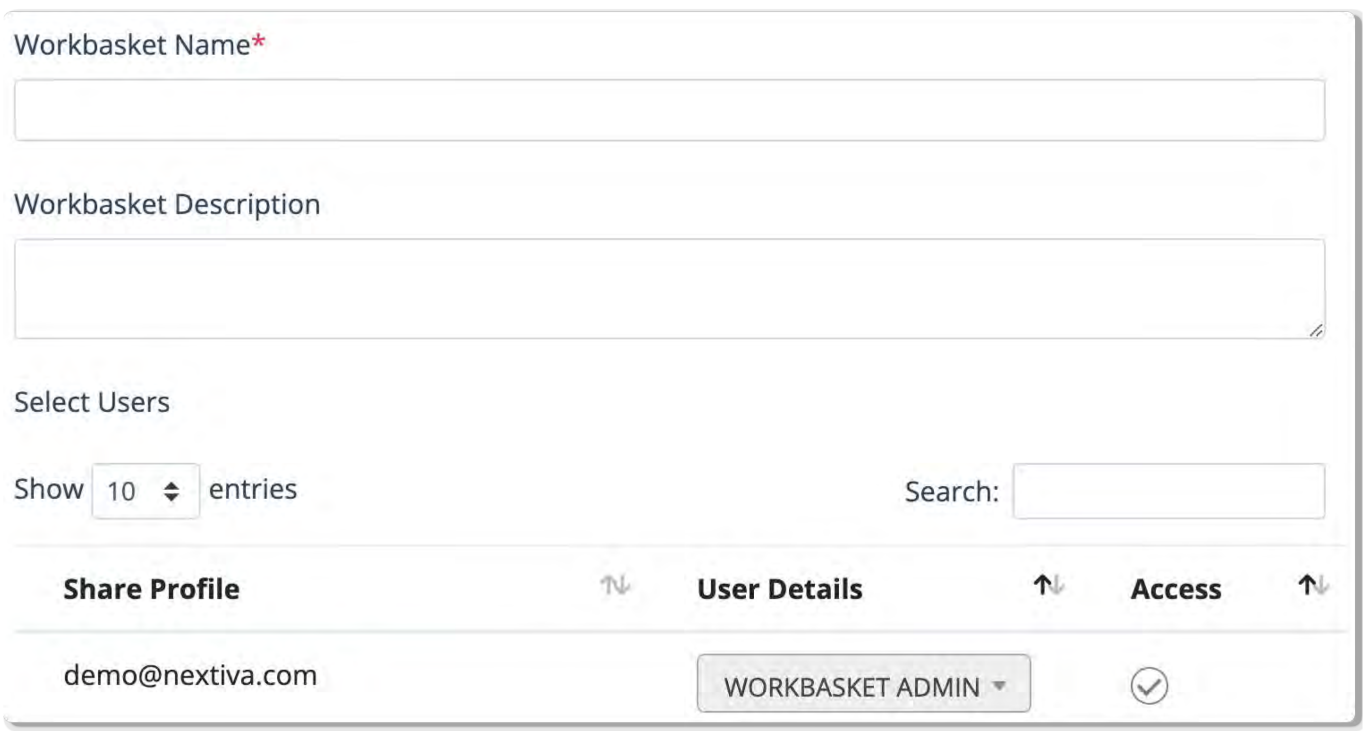
Create Workbaskets aka teams to route customer interactions to the right group of users. For example, you can create workbaskets for specific departments so interactions are routed to the correct team based on business hours or specified keywords.

## Creating workbaskets

From the main dashboard, click **Settings** > **Profile Management** > **Edit Profile** > **Workbaskets** > **+ New Workbasket**. Enter a name, description (optional), and select the users you would like to assign to the workbasket by selecting the Access button.

You can also manage the user role (Workbasket Admin/Agent) from here. Workbasket Admin is allowed to send replies directly without any approval, whereas, Workbasket Agent has to be approved by a Workbasket Admin.

> **NOTE:** You can also assign users to Workbaskets under Users (**Edit User Access** > **Add roles to Workbasket**).



# Creating rules

Use the Organizer to create personalized rules used for automation. Below are a few examples of how you could take advantage of this tool.

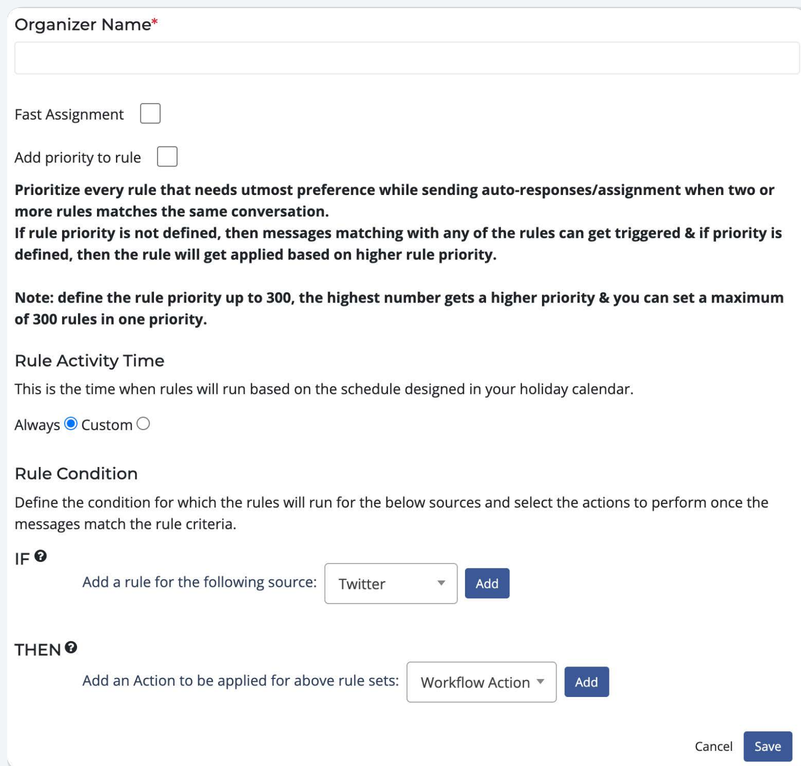
- Auto-route tickets to the most qualified team members
- Auto-response based on keywords found in the message
- Auto-response to acknowledge the post was seen
- Auto-tag messages
- Business/after-hour routing (send tickets to the California team 5AM-9PM and to the New York team 9PM-5AM)

Under **Organizer**, you can manage and create new rules. To create a new rule, click **Create** and enter a name.

Set the rule priority for sending auto-response/assignment (Optional).

Priority is measured on a scale of 0 to 300, where a higher number is associated with higher priority. If two or more rules match, the higher priority rule is triggered.

Set up the Rule Activity Time. You either choose “Always” or “Custom”.




Define the condition for which the rules will run by selecting the source and the action to perform if the rule criteria is met. For example, if anyone sends you a message via Facebook, you can have it automatically send a response back confirming their message was received. Click **Save**.

# Adding schedules

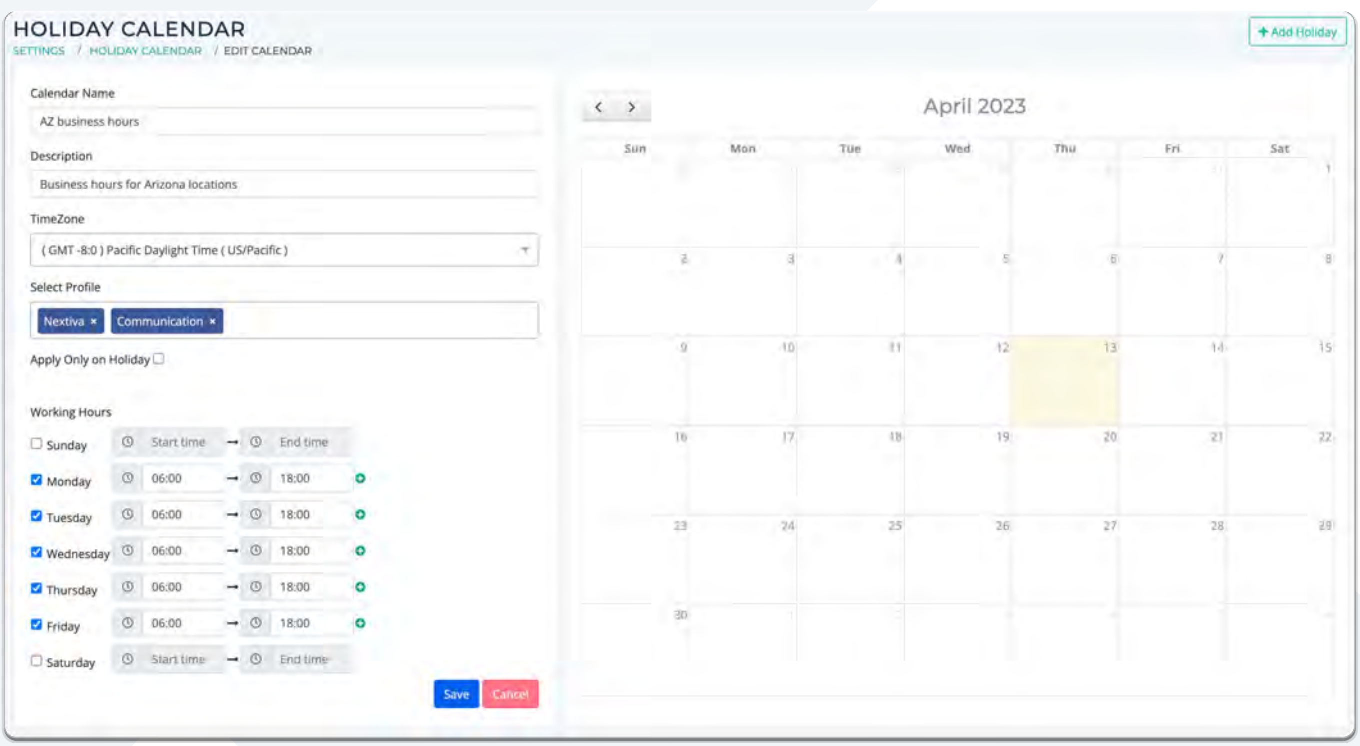
You can set up a schedule with your business hours and holidays for specific profiles to follow custom rules, such as automatically sending a predefined response during specified holidays and outside business hours.

From the main dashboard, click **Settings** and **select** Holiday **Calendar** > **+ Add Calendar**.

Enter a name for the new calendar (required), description (optional), time zone (required), and the profile(s) to associate the calendar with.

To add a holiday, click **+ Add Holiday** at the top right corner, select the date and holiday name or reason. Click **Save** and select the make sure to select the **Apply only on holiday** check box.

Enter the start and end time for each day, and you can also add breaks by selecting **Plus** (**+**) to the right of the end time. Click **Save**.



# Unibox

Instantly view and respond to customer interactions for all integrated social media channels from one inbox.

From the main dashboard, click **Unibox** to view all tickets. By default, the main tab shows all cases aka tickets you are assigned to or associated with so you can easily view and respond.

You can filter tickets based on the status (assigned/reassigned, approved, etc.) using the status drop-down at the top or by selecting the **Filter** icon. You can also filter tickets based on the profile, dates, sources (channels), and more. To save filters, click **Save filter** at the top.

Select the ticket to view the customer interaction. Select **Click here to start working on this case** on the bottom right to respond. You can also add notes to the interaction. Edit and format the text to match your brand, including the option to include attachments and emoji. Reply now or schedule it to send later.

At the top of the conversation thread, you can assign the ticket to specific workbaskets or users, including the option to update the case status. You can also schedule a follow up date from here. The other tabs at the top allow you to view and filter all tickets associated with the profiles you have access to and any saved filters.