



Nextiva Social Management

Version 1.0

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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.

The screenshot displays the Nextiva social media management dashboard. On the left, a vertical sidebar contains navigation icons. The main content area is divided into three panels:

- Left Panel (List of Tweets):** Shows a list of tweets from various users. The top tweet is from "pawsy-commons-pet-hotel" (Pawsy Commons Pet Hotel) with the text: "Hey, Good to know that you are interested in our products. We would be launching few" (10:09 AM Sun, Feb 12 | Comment). Below it is a tweet from "Morgan Gorman" (@MorganGorman22) dated 08:53 AM Sun, Jan 29, with the text: "Oreo was bit by another dog while at @PawsyCommons. I wish they would have".
- Middle Panel (Detailed View):** Shows a detailed view of the tweet from "Morgan Gorman" (@MorganGorman22) dated 08:53 AM Sun, Jan 29. The text reads: "Oreo was bit by another dog while at @PawsyCommons. I wish they would have done more to keep aggressive dogs away from the angels like my Oreo. <https://t.co/lkDYo5vLam>". It shows 0 Retweets and a "More" dropdown menu. Below the tweet is a reply input field for "PawsyCommons" with a "Send DM Link" checkbox, "Add Notes" button, and "Reply to message" dropdown. The input field contains "@MorganGorman22" and a "280" character count. A "Send Later" checkbox and a "Reply" button are also visible.
- Right Panel (Case Details):** Shows the profile of "Morgan Gorman22" (@MorganGorman22) with 2 Tweets and 13 Following. Below the profile is the "Case Details" section for ticket #RKSI-42, assigned to "Social-Benjamin". The case status is "In-Progress". The case started on 08:54 AM Sun, Jan 29. The priority is "CRITICAL" (other options: HIGH, MEDIUM, LOW, TRIVIAL). The property is "Pawsy Profile". Below this is the "Case History" section showing the case is ongoing and the tweet text: "Oreo was bit by ano...".

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**.

USERS
SETTINGS / USERS

Alert Users + Add User

Show 10 entries Search:

<input type="checkbox"/>	Name	Short Name	Email	Role	Last Logged in	Action
<input type="checkbox"/>	 Benjamin Litke	Benjamin	benjamin.litke@pawtsy.com	Social Plus	05:35 PM Wed, Mar 29	  
<input type="checkbox"/>	 Dana Gilday	Dana	dana.gilday@pawtsy.com	OWNER	05:43 PM Wed, Mar 29	
<input type="checkbox"/>	 Miles Christopher	Miles	miles.christopher@pawtsy.com	Social Plus	05:33 PM Wed, Mar 29	  
<input type="checkbox"/>	 Tallon Fish	Tallon	tallon.fish@pawtsy.com	ADMIN	04:51 PM Wed, Mar 29	  
<input type="checkbox"/>	 Taylor Brown	Taylor	taylor.brown@pawtsy.com	SUPER ADMIN	05:45 PM Wed, Mar 29	  
<input type="checkbox"/>	 Chinmay Bassi	Chinmay	chinmay.bassi@pawtsy.com	SUPER ADMIN	08:09 PM Tue, Mar 28	  
<input type="checkbox"/>	 Sarah Lopez	Sarah	sarah.lopez@pawtsy.com	ADMIN	07:43 PM Mon, Mar 27	  
<input type="checkbox"/>	 Garrett Dee	Garrett	garrett.dee@pawtsy.com	Social Plus	08:05 PM Wed, Mar 22	  
<input type="checkbox"/>	 Ray Nordstrom	Ray	ray.nordstrom@pawtsy.com	SUPER ADMIN	02:01 PM Wed, Mar 22	  
<input type="checkbox"/>	 Tomas Hernandez	Tomas	tomas.hernandez@pawtsy.com	ADMIN	11:00 PM Tue, Mar 21	  
	Name	Short Name	Email	Role	Last Logged in	Action

Showing 1 to 10 of 108 entries

Previous 2 3 4 5 ... 11 Next

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.

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**).

Workbasket Name*

Workbasket Description

Select Users

Show entries Search:

Share Profile	↕	User Details	↕	Access	↕
demo@nextiva.com		WORKBASKET ADMIN ▾		<input checked="" type="checkbox"/>	

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”.

Organizer Name*

Fast Assignment

Add priority to rule

Prioritize every rule that needs utmost preference while sending auto-responses/assignment when two or more rules matches the same conversation. If rule priority is not defined, then messages matching with any of the rules can get triggered & if priority is defined, then the rule will get applied based on higher rule priority.

Note: define the rule priority up to 300, the highest number gets a higher priority & you can set a maximum of 300 rules in one priority.

Rule Activity Time
This is the time when rules will run based on the schedule designed in your holiday calendar.

Always Custom

Rule Condition
Define the condition for which the rules will run for the below sources and select the actions to perform once the messages match the rule criteria.

IF ⓘ

Add a rule for the following source:

THEN ⓘ

Add an Action to be applied for above rule sets:

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**.

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.

The screenshot displays the Unibox interface, which is a unified inbox for customer interactions. The interface is divided into three main sections:

- Left Panel (Inbox):** A list of messages from various sources. The top message is from "pawsy-commons-pet-hotel" with a comment from "Morgan Gorman" (@MorganGorman22) dated 08:53 AM Sun, Jan 29. Below it are messages from Benjamin Kirchner and Mahesh Raju.
- Center Panel (Conversation Thread):** A detailed view of the tweet from Morgan Gorman. The tweet text reads: "Oreo was bit by another dog while at @PawseyCommons. I wish they would have done more to keep aggressive dogs away from the angels like my Oreo. <https://t.co/lkDYo5vtam>". The interface shows options to assign the ticket to "Social+Benjamin" and set the status to "In-Progress". At the bottom, there is a text input field for replying, with a "Send Later" option and a "Reply" button.
- Right Panel (Case Details):** A summary of the case. It shows the user profile for Morgan Gorman (@MorganGorman22) with 2 tweets and 13 following. The case details include:
 - Case ID: RKSI-42
 - Ticket ID: Pawsy Profile
 - Case Started: 08:54 AM Sun, Jan 29
 - Priority: CRITICAL (highlighted in red)
 - Property: Select Property
 - Case History: #RKSI-42 Ongoing | 08:54 AM Sun, Jan 29 | Oreo was bit by ano...