NEXTOS 3.0
ADMINISTRATOR
QUICK START GUIDE

NextOS 3.0 Portal

The NextOS 3.0 portal is a web-based portal for setting up and managing your Nextiva account. You will be able to manage users, devices, features, billing information, and your other account settings, all in one place.

Logging in to the NextOS 3.0 Portal

1. Go to www.nextiva.com in a web browser (Chrome, Safari, Internet Explorer, etc.).

2. Click the Customer Login at the top right of the screen.

3. Log in to the NextOS 3.0 portal on the right side of the screen using the credentials provided in the welcome email you received when your Nextiva account was created.

4. After you sign in with your credentials, you will be prompted to create a new password and set up a PIN. The PIN is used to verify your identity when you call into Nextiva support.

5. Once logged in, you should see the main dashboard for your account. The dashboard is discussed in more detail below.

Adding a User

1. Go to the Users tile on the dashboard, and select **Add**.

2. Enter the required information in the **User profile**.

3. If the user is not physically based at their assigned location, be sure to update their E911 address. Otherwise that user will default to the location E911 address.

4. After the user profile is saved, you will have the option to assign a device to them. Select the **Nextiva Device** radio button to assign an existing device to the user. Alternatively, select the **Own Device** radio button to assign a new device to the user. Use the **Generate** buttons to create secure authentication details.

5. Lastly, you may select or add a **Business hour greeting** and **Busy greeting** for the user.

NextOS 3.0 Portal

Editing a User

1. Go to the **Users** tile on the dashboard, and select **Manage**.

2. When you see the **Manage users** table, select the Edit Icon while hovering over the user you wish to edit. As the administrator of your account, you can edit users' profile information, reset their passwords and PINS, assign them devices, and manage their call feature settings.

Adding a Device

1. Go to the **Devices** tile on the dashboard, and select **Add**.

2. If you have purchased new phones from Nextiva, the device(s) will be available to select in the drop-down list automatically.

3. If you are using your own device(s), click the **Own Device** radio button. On the drop-down list, 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 **Assign** to provision the device. This officially adds it to your account, so that you can assign it to a user now or at a later time.

Assigning a Device

1. Go to the **Users** tile on the dashboard, and select **Manage**.

2 Select the Edit Icon while hovering over the user you wish to edit.

3. Click on the **Device** section, and select the Nextiva or Own device you wish to assign to that user. Then generate the Authentication Name and Password for the user, and click the **Save & Continue** button.

NextOS 3.0 Portal

My Account (including Billing)

As the administrator of your account, you can access the My Account section to view your monthly payment amount and due date, make payments, add/edit credit card information, review your call history and past invoices, manage license assignments, and keep track of any overage expenses.

1. Your current bill total, monthly minutes usage and next payment date is displayed right on the dashboard. To access any other account billing information, hover over the **Gear Icon** ⚙, and select **My account**.

2. To view current usage details, or make a payment, go to the **Billing Summary** page under Billing.

3. To update the credit card or billing address on file, go to the bottom of the **Billing Summary** page and choose the Add Icon ⊞ in the lower right to add a new credit card to your account. Or use the Edit Icon ✎ to make an update.

Schedule Setup

When creating schedules, you should think about the Call Groups, Auto Attendants, and Call Forwarding options that you may want to program – in other words, the way you will want your call flows to work.

1. Select the **Schedules** link in the top navigation bar of the dashboard.

2. Choose the **Create Schedules** option, and make selections to determine whether it will be a regular or holiday schedule, and the level at which this schedule can be used: Enterprise, Location or User. Then click the **Save** button to continue.

3. For regular schedules that do not include any breaks, use the slider bars to schedule the weekly **business hours** for your company.

4. If there will be a break in your schedule, create your schedule using **Events**. Using Events, you can create an AM and a PM schedule to include a break for lunch, build the schedule as an After Hours schedule by triggering the schedule when you are closed, or add a monthly half-day, Fridays off in July, etc.

5. For holiday schedules, simply add Events for any holidays and set them to recur monthly, yearly, or as a one-time occurrence.

NextOS 3.0 Portal

Creating a Call Group

To group users' extensions together into departments or specific groups, you can create Call Groups. After you create your Call Groups, we strongly suggest testing them to ensure they are routing correctly.

1. Select the **Advanced routing** tile on the dashboard.

2. Click **Create call groups**.

3. Enter the required information in the Profile section.

4. Select a call distribution policy from the drop-down menu and add available users to call group.

In the advanced settings drop-down, you can choose how you want incoming calls to "hunt" for users, as well as decide how to proceed if no one is available to answer an incoming call. You may want to forward these calls to a company voicemail or external phone number.

Creating an Auto Attendant

Auto attendants allow you to have an automated receptionist that provides a personalized message and allows callers to route automatically to the correct person or call group.

1. Select the **Advanced routing** tile on the dashboard.

2. Click **Create auto attendant** on the left side of the screen.

3. Enter the required information in the Profile section.

4. After clicking **Save & Continue**, you will be able to set up the Business Hours menu and the After Hours menu for the auto attendant. Follow the steps below to complete this.

5. Scroll down to the Business Hours main menu section.

6. Select **Personal Greeting** from the Greeting drop-down list. You will need to upload a custom greeting to the Location or Auto Attendant Announcement Repository for the auto attendant.

7. Make sure the **Enable first-level extension** check box is selected. This allows callers to dial the extension of the person they want to speak to, if they know it.

NextOS 3.0 Portal

Creating an Auto Attendant (continued)

8. Create your auto attendant menu by selecting keys for the caller to press, along with their associated actions.

9. Click the green **Save** button at the bottom of the Business Hours main menu screen.

Call Features

As the administrator of your account, you are able to enable and set up your users' Nextiva call features for them. All user feature settings can be managed by following the first 3 steps below (in step 3, 'Forwarding' can be replaced with any of the feature categories). As an example we'll walk you through Call Forwarding, one of our most popular features.

Call Forwarding

Call Forwarding will send incoming calls to a secondary number as designated by the feature 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 overrides the option you are trying to add.

1. Go to the **Users** tile on your account dashboard, and select the **Manage** link.

2. Select the Edit Icon 🖉 while hovering over the user whose call forwarding settings you wish to edit.

3. Open the **Forwarding** section and select the feature's Edit Icon 🖉 . This will open the fields where you can decide what phone number to save as the forwarding phone number.

4. Once you have saved the forwarding phone number, it will be displayed next to the individual forwarding option for quick reference.

NextOS 3.0 Portal

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 audio, 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 guides and additional information, please visit our website:
nextiva.com/support

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