



## **Nextiva CRM**

VERSION 4.4

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## Nextiva CRM

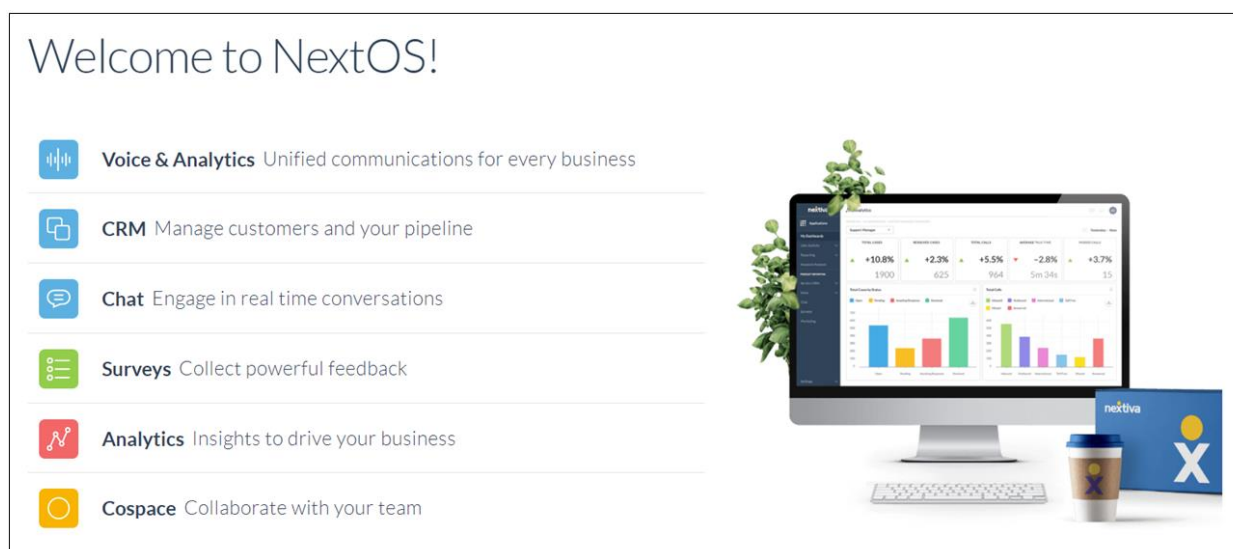
Nextiva's Customer Relationship Management tool (CRM) is used to enhance customer relationships by tracking the customer journey from recruitment to cancelation. Nextiva CRM improves business productivity, profitability, and communication processes all within one system.

Use Nextiva CRM to:

- Identify sales leads.
- Convert leads to opportunities for tracking.
- Address customer issues.
- View Analytics, which provides customer insight.
- Manage all communication and customer data in one place.

## Logging In

1. Visit [www.nextiva.com](http://www.nextiva.com), and click **Client Login** to log in to NextOS.
2. From the NextOS Home Page, select **CRM**.



## Accounts

An **Account** is a CRM record used to store customer information, along with a history of all interactions related to that Account. Users can associate an Account with other CRM records, such as Cases, Contacts, and Opportunities.

Click **Account** from the left-panel to view all Account records in Nextiva CRM.

Account Name	Account Owner	Email	Phone	Experience Sc...	Website	Account Value	Created By	Created Date	
ABC Cleaning	Kris Jacobson	abc@cleaning.com	8002857995	80	www.abccleaning.com	\$2,773.34	Kris Jacobson	2019-09-18 09:53 AM	<input type="checkbox"/>
Scooter Rentals	Kris Jacobson	scooters@floridascoo...	8003214567	0	www.floridascooterne...	—	Kris Jacobson	2019-09-18 12:33 PM	<input type="checkbox"/>
Vacations Depot	Kris Jacobson	contactus@vacations...	8009095555	20	www.vacationsdepot...	\$9,227.35	Kris Jacobson	2019-09-23 03:45 PM	<input type="checkbox"/>
The Smokehouse	Kris Jacobson	info@smokehouse.com	7153703343	49	www.thesmokehouse...	\$2,076.00	Kris Jacobson	2019-09-23 04:40 PM	<input type="checkbox"/>
Nacho Taco	Kris Jacobson	heythere@nachotaco...	8288392674	89	www.thatsnachotaco...	\$169.00	Kris Jacobson	2019-09-23 03:24 PM	<input type="checkbox"/>
Tony's Pizza	Kris Jacobson	eat@tonyspizza.com	7872321000	93	www.tonyspizzaplace...	\$734.00	Kris Jacobson	2019-09-23 03:35 PM	<input type="checkbox"/>
XYZ Cleaning	Kris Jacobson	contact@xyzcleaning...	8002857996	88	www.xyzcleaning.com	\$99.99	Kris Jacobson	2019-09-19 03:59 PM	<input type="checkbox"/>
Dee's Bakery	Kris Jacobson	contact@deesbakery...	7439203210	50	www.deesbakery.com	\$306.78	Kris Jacobson	2019-09-23 03:31 PM	<input type="checkbox"/>
Crush Candy	Kris Jacobson	orders@crushcandy...	2103837272	93	www.crushcandy.com	\$6,227.40	Kris Jacobson	2019-09-23 04:23 PM	<input type="checkbox"/>
CDP Logistics	Kris Jacobson	info@gocdp.com	8002087920	33	www.gocdp.com	\$16,500.00	Kris Jacobson	2019-09-23 01:57 PM	<input type="checkbox"/>
Terry's Burgers	Kris Jacobson	contact@terrysburge...	5128013375	80	www.terrysburgers.c...	\$839.00	Kris Jacobson	2019-09-23 12:39 PM	<input type="checkbox"/>
Tokyo Noodles	Kris Jacobson	hello@eatnoodles.com	8004441000	75	www.tokyonoodles.com	\$4,615.00	Kris Jacobson	2019-09-23 11:36 AM	<input type="checkbox"/>

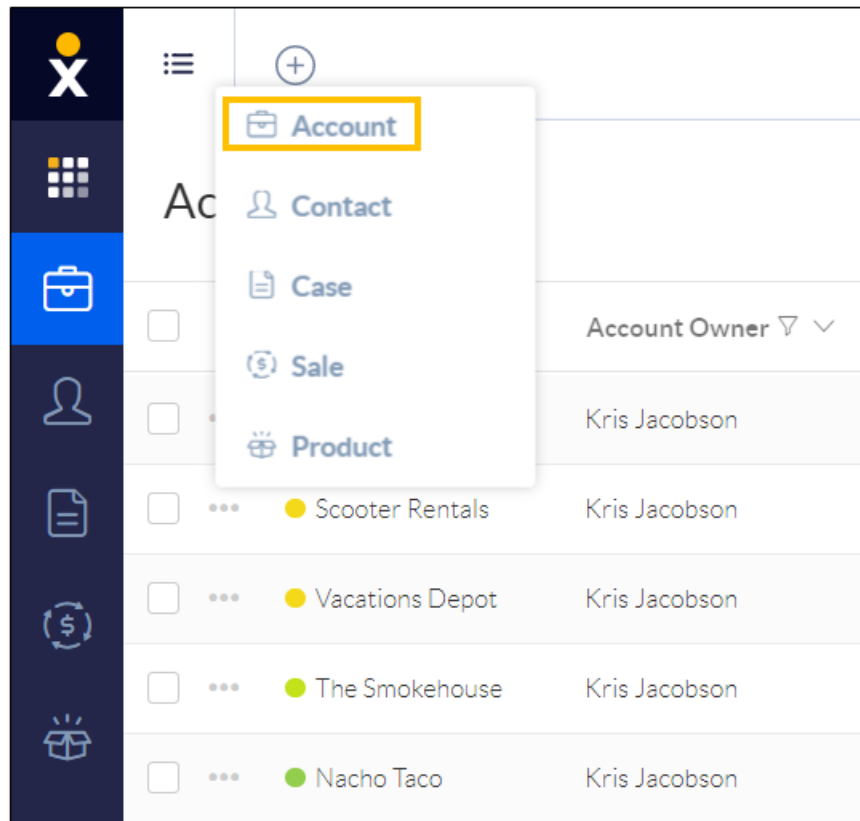
Account View

Users can perform the following actions in the Account view:

- Click the **Plus (+)** icon to add a new record (Account, Contact, Case, Lead, Opportunity, Product, or a custom record type).
- Click the row corresponding to an Account to view the Account Workspace.
- Click the **Ellipsis (...)** icon corresponding to an Account to open a list of contextual actions. Users can use this menu as a shortcut to create system records related to the Account.
- Select the checkbox(es) corresponding to the desired Account(s), and click the **Export** icon to export the Account data to a **.csv** file.

## Creating Accounts

1. Click the **Plus (+)** icon and select **Account**.



*Account Option*

2. Fill out the **New Account** form and click **Save**.

### New Account

---

#### Account Information ^

ACCOUNT NAME	ACCOUNT OWNER Select...
ACCOUNT NUMBER	PRIMARY CONTACT Select...
EXPERIENCE SCORE	INDUSTRY
EMPLOYEE COUNT Select...	ACCOUNT VALUE
WEBSITE	DESCRIPTION

---

#### Contact Detail ^

EMAIL	FAX
PHONE +1	

---

#### Address Information ^

SHIPPING ADDRESS STREET 1	BILLING ADDRESS STREET 1
SHIPPING ADDRESS STREET 2	BILLING ADDRESS STREET 2
SHIPPING ADDRESS CITY	BILLING ADDRESS CITY
SHIPPING ADDRESS STATE	BILLING ADDRESS STATE
SHIPPING ADDRESS POSTAL CODE	BILLING ADDRESS POSTAL CODE
SHIPPING ADDRESS COUNTRY Select...	BILLING ADDRESS COUNTRY Select...

New Account Form

## Account Workspace

In the **Account** view, search and select an Account to view the **Account Workspace**. The Workspace allows Users to easily view and manage Account information, Contact details, Interactions, Analytics, and more.

The screenshot displays the 'ABC Cleaning' Account Workspace. The top navigation bar includes 'Overview', 'Details', 'Related', 'Analytics', and 'Audit log'. The 'Overview' section is active, showing account details on the left and analytics on the right.

**Account Overview (Left Panel):**

- ACCOUNT NAME:** ABC Cleaning
- ACCOUNT VALUE:** \$2773.34
- SHIPPING ADDRESS:** 6800 E. Chaparral Rd. AZ. 85250
- BILLING ADDRESS:** 6800 E. Chaparral Rd. AZ. 85250
- INDUSTRY:** Cleaning Service
- EMPLOYEE COUNT:** 1-50
- RECENT CASES (3):**
  - Request: Update Payment Due Date (Status: Resolved)
  - Pro Recording Request (Status: Open)
- RECENT OPPORTUNITIES:**
  - Monthly Service Contract (Stage: saleStage)
- Contacts:**
  - CONTACT NAME: Taylor Smith
  - EMAIL: taylor@abccleaning.com
  - LAST ACTIVITY: Taylor will call back with new credit card.

**Analytics (Middle Panel):**

- SENTIMENT TREND:** Positive (Positive language detected based on recent interaction)
- CUSTOMER FEEDBACK TREND:** 4.4 stars (89% positive ratings received based on recent survey responses)

**Interaction History (Right Panel):**

- WEDNESDAY, SEPTEMBER 18TH**
  - KJ Kris Jacobson** (Call): Call Taylor on Monday (Sep 18 11:39 AM)
  - Kris Jacobson** (Logged): Taylor is happy with the service. (Sep 18 11:40 AM)
- THURSDAY, SEPTEMBER 19TH**
  - KJ Kris Jacobson** (Call): Rescheduled payment date to the 15th of each month. (Sep 19 12:20 PM)

Account Workspace

## Overview Tab

The **Overview** tab displays necessary Account information, such as account name, shipping and billing addresses, associated Contacts, and Analytics. Recent Cases and Opportunities associated with the Account also appear on the Overview tab.

**ABC Cleaning**

**Overview** Details Related Analytics Audit log

**Account Overview**

ACCOUNT NAME  
ABC Cleaning

ACCOUNT VALUE  
\$2773.34

SHIPPING ADDRESS  
8800 E. Chaparral Rd, AZ, 85250

BILLING ADDRESS  
8800 E. Chaparral Rd, AZ, 85250

INDUSTRY  
Cleaning Service

EMPLOYEE COUNT  
1-50

RECENT CASES (3)

- Request: Update Payment Due Date  
Status: Resolved
- Pro Recording Request  
Status: Open

RECENT OPPORTUNITIES

- Monthly Service Contract  
Stage: saleStage

**Contacts**

TS AS +

CONTACT NAME  
Taylor Smith

EMAIL  
taylor@abccleaning.com

LAST ACTIVITY  
Taylor will call back with new credit card.

**SENTIMENT TREND**

**Positive**

Positive language detected based on recent interaction

**CUSTOMER FEEDBACK TREND**

★★★★☆

**4.4 stars**


89% positive ratings received based on recent survey responses

Overview Tab



## Details Tab

The **Details** tab allows Users to view and edit Account information, Contact details, and address information.



**ABC Cleaning**

Overview

Details

Related

Analytics

Audit log

**Account Information** ^

ACCOUNT NAME ABC Cleaning	ACCOUNT OWNER kris@nextiva.com
ACCOUNT NUMBER 8999755	PRIMARY CONTACT Alexa Smith
EXPERIENCE SCORE 80	INDUSTRY Cleaning Service
EMPLOYEE COUNT 1-50	ACCOUNT VALUE 2773.34
WEBSITE www.abccleaning.com	DESCRIPTION

**Contact Detail** ^

EMAIL abc@cleaning.com	FAX
PHONE +18002857995	

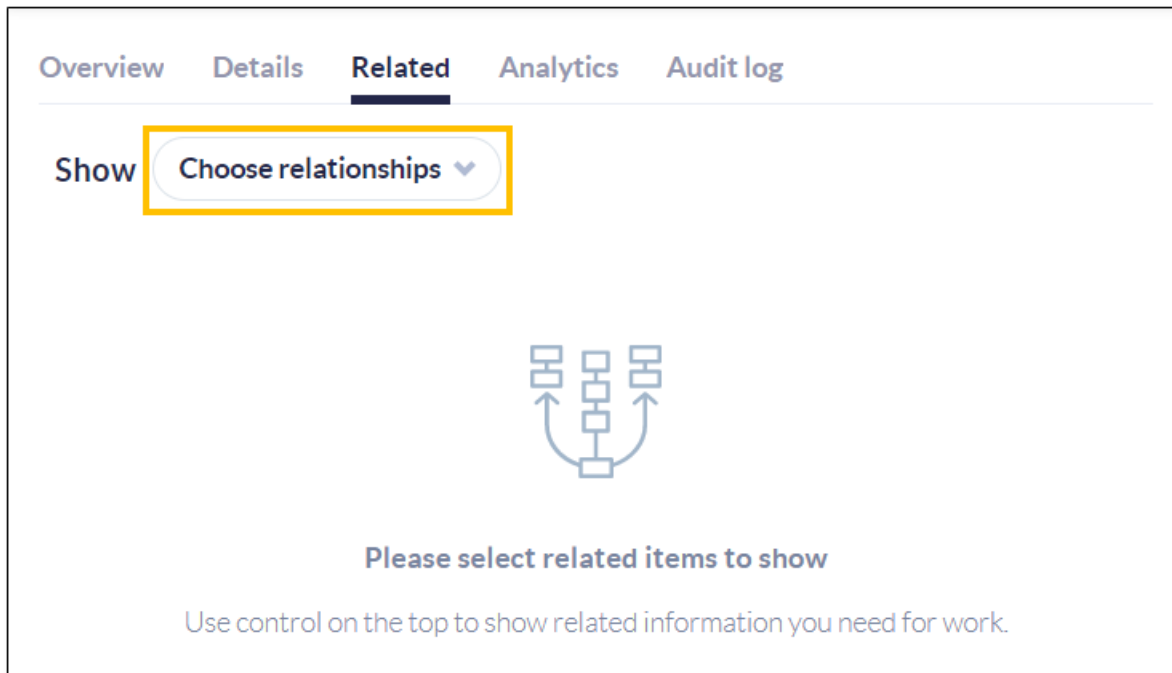
**Address Information** ^

SHIPPING ADDRESS STREET 1 8800 E. Chaparral Rd	BILLING ADDRESS STREET 1 8800 E. Chaparral Rd
SHIPPING ADDRESS STREET 2	BILLING ADDRESS STREET 2
SHIPPING ADDRESS CITY Scottsdale	BILLING ADDRESS CITY Scottsdale
SHIPPING ADDRESS STATE AZ	BILLING ADDRESS STATE AZ
SHIPPING ADDRESS POSTAL CODE 85250	BILLING ADDRESS POSTAL CODE 85250
SHIPPING ADDRESS COUNTRY United States	BILLING ADDRESS COUNTRY United States

Details Tab

## Related Tab

The **Related** tab displays all relationships associated with the Account. Click **Choose relationships** and select the desired record type(s) (**Cases, Contacts, Child/Parent Accounts, Opportunities**) from the drop-down menu.



*Related Tab*

To associate an existing record, such as a Case, with an Account, hover over the top-right corner above the table and click **Add**. Click **Create new** to automatically associate and create a new record type. For example, ABC Cleaning calls in wanting to update Account information. The Agent handling the call can add a new Case here and have it automatically related to the account ABC Cleaning.

## ABC Cleaning

Overview Details **Related** Analytics Audit log

Show Cases, Contacts ▾

### Related Cases

SHOWING 1-3 OF 3

<input type="checkbox"/>	Case Number ▾ ▾	Account Name ▾ ▾	Case Owner ▾ ⚙
<input type="checkbox"/> ... 👁	UUB-1745406	ABC Cleaning	Kris Jacobson
<input type="checkbox"/> ... 👁	WSK-5334768	ABC Cleaning	Kris Jacobson

### Related Contacts

SHOWING 1-2 OF 2

<input type="checkbox"/>	Contact Name ▾ ▾	Contact Owner ▾ ▾	Email ▾ ▾	⚙
<input type="checkbox"/> ...	Alexa Smith	Kris Jacobson	Alexa.smith@abcclean...	

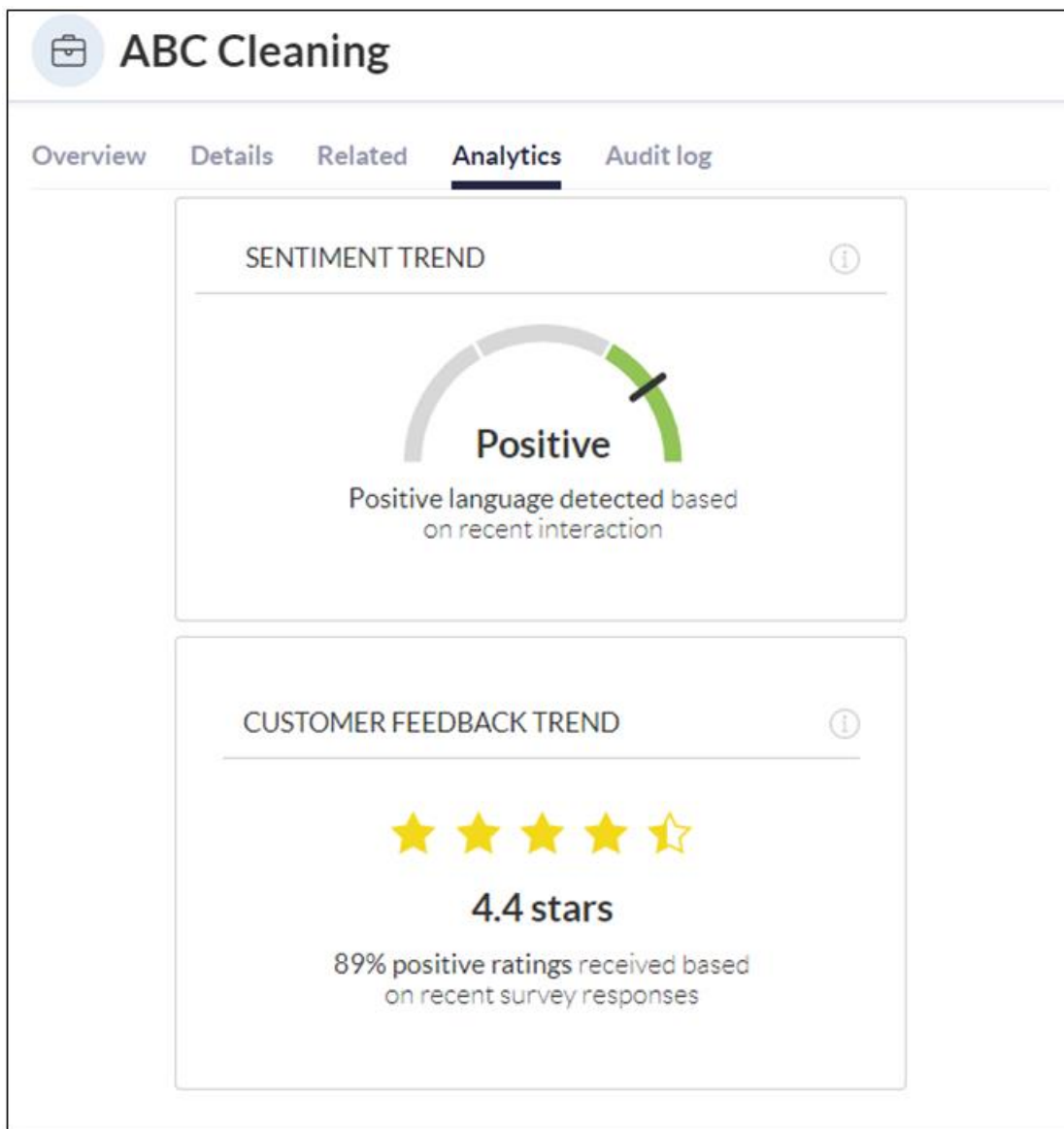
**+ Add** **+ Create new**

*Add/Create New Options*

## Analytics Tab

On the **Analytics** tab, view and quickly reference the Sentiment Trend and Customer Feedback details.

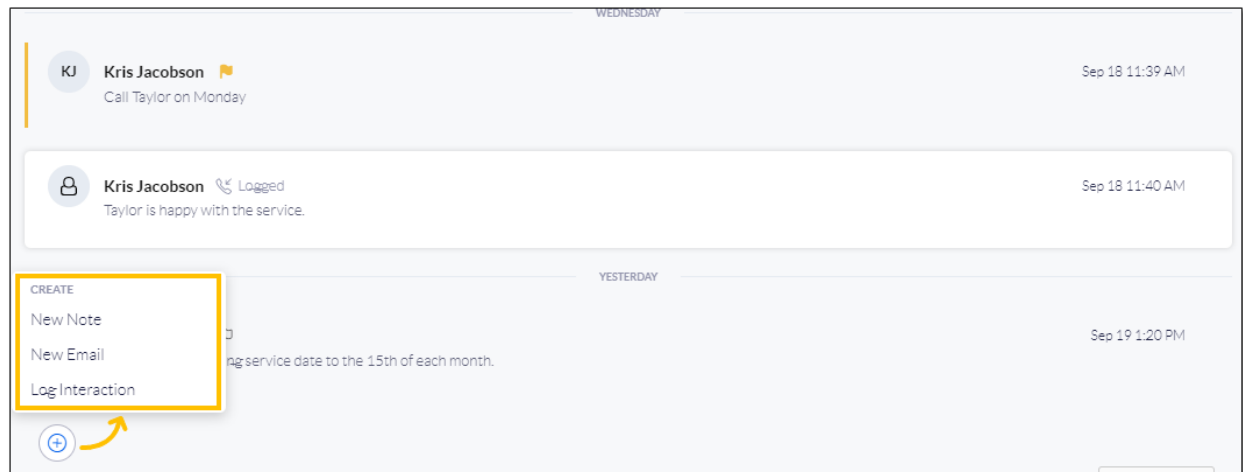
- **Sentiment Trend works to** estimate the customer's current disposition. Nextiva CRM calculates this metric by gathering positive and negative keywords in the Account's activities and SmartTopics. This can be customized based on customer needs and industry.
- **Customer Feedback Trend** reports the outcome of any surveys the customer has completed.



Analytics Tab

## Interaction History

View all recent communication on the **Interaction History** feed to the right of the Workspace. Users can also create a [Note](#), [Email](#), and [Log Interactions](#) by clicking the **Plus (+)** icon on the bottom-left corner of the **Interaction History** feed.



*Interaction History Feed*

## Contacts

A **Contact** is a CRM record used to store necessary customer information, such as name, contact information, address information, and more. Users can associate a Contact with other CRM records, such as Accounts, Cases, and Opportunities.

Click **Contact** from the left-panel to view all Contact records in Nextiva CRM.

Contact Name	Contact Owner	Email	Mobile Phone	Work Phone	Fax	Interaction Pr...	Last Interact...	Created By	Cr
Taylor Smith	Kris Jacobson	taylor@abccleaning.c...	4805551234	8002857995	--	Phone	--	Kris Jacobson	2019-09
Satoshi Yamakura	Kris Jacobson	satoshi@tokyonoodle...	2183430927	2183335398	--	Phone	--	Kris Jacobson	2019-09
Jen Cnan	Kris Jacobson	jen@tokyonoodles.com	2104340291	--	--	Phone	--	Kris Jacobson	2019-09
Terry Paulson	Kris Jacobson	--	8182233745	8182233733	--	Phone	--	Kris Jacobson	2019-09
Dee Perkins	Kris Jacobson	dee@deesbakery.com	2723516392	8002347989	8002347980	Phone	--	Kris Jacobson	2019-09
Barbara Adams	Kris Jacobson	badams@gocob.com	3184258927	--	--	Email	--	Kris Jacobson	2019-09
Alberto Gonzalez	Kris Jacobson	alberto@thatsnachot...	4249903445	4245956877	--	Phone	--	Kris Jacobson	2019-09
Tony Martinelli	Kris Jacobson	Tony@Tonyspizza.com	3237073977	8289093849	80074700234	Chat	--	Kris Jacobson	2019-09
Kevin Mason	Kris Jacobson	kmason@yahoo.com	5125173145	--	5125173140	SMS	--	Kris Jacobson	2019-09
Elena Townsend	Kris Jacobson	elena.townsend@vaca...	5056286756	--	8004943727	Phone	--	Kris Jacobson	2019-09
Jacob Siveet	Kris Jacobson	jsiveet@crushcandy.c...	2107782323	2107785757	--	Email	--	Kris Jacobson	2019-09
Michelle Donalds	Kris Jacobson	michelle.donalds@gm...	5158082827	--	--	Email	--	Kris Jacobson	2019-09

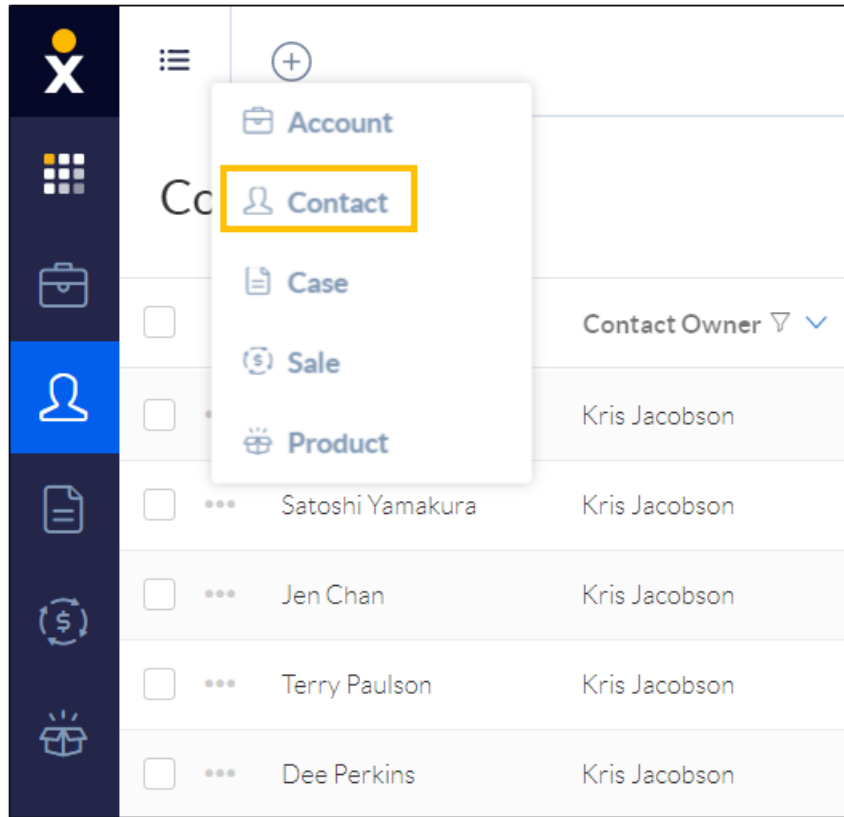
Contact View

Users can perform the following actions in Contact view:

- Click the **Plus (+)** icon to add a new record (Account, Contact, Case, Lead, Opportunity, Product, or a custom record type).
- Select the checkbox(es) corresponding to the desired Contact(s) and click the **Export** icon to export the Contacts data to a **.csv** file.
- Click the **Ellipsis (...)** icon corresponding to a Contact to open a list of contextual actions. Users can use this menu as a shortcut to create system records related to the Contact.
- Click the row corresponding to a Contact to view the Contact Workspace.


## Creating Contacts

1. Click the **Plus (+)** icon and select **Contact**.



*Contact Option*

2. Complete the **New Contact** form and click **Create**.

 **New Contact**

**Contact Information**

CONTACT NAME <hr/>	CONTACT OWNER Select... <hr/>
PRIMARY OF Select... <hr/>	TYPE Select... <hr/>
PREFERRED NAME <hr/>	FIRST NAME <hr/>
BIRTHDATE <hr/>	LAST NAME <hr/>

**Contact Details**

HOME PHONE +1 <hr/>	ASSISTANT <hr/>
MOBILE PHONE +1 <hr/>	ASSISTANT PHONE +1 <hr/>
WORK PHONE +1 <hr/>	<input type="checkbox"/> Do Not Call
EMAIL <hr/>	<input type="checkbox"/> Do Not Email
FAX <hr/>	INTERACTION PEF Select... <hr/>

**Address Information**

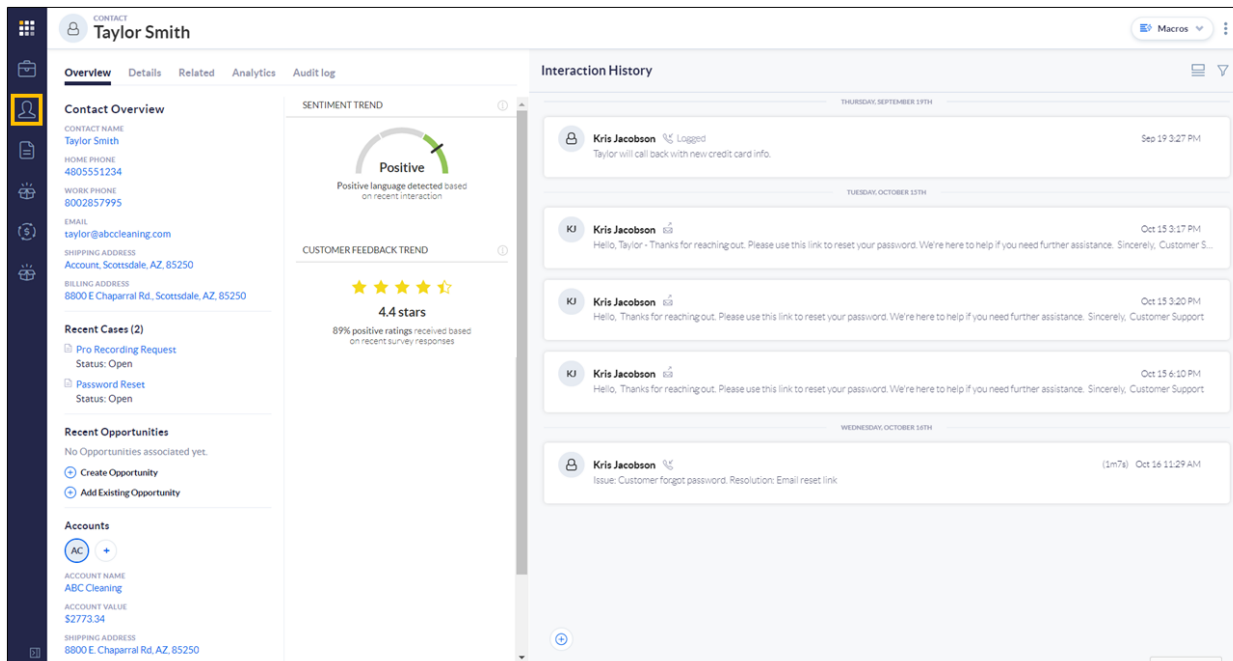
MAILING ADDRESS STREET 1 <hr/>	BILLING ADDRESS STREET 1 <hr/>
MAILING ADDRESS STREET 2 <hr/>	BILLING ADDRESS STREET 2 <hr/>

*New Contact Form*



# Contact Workspace

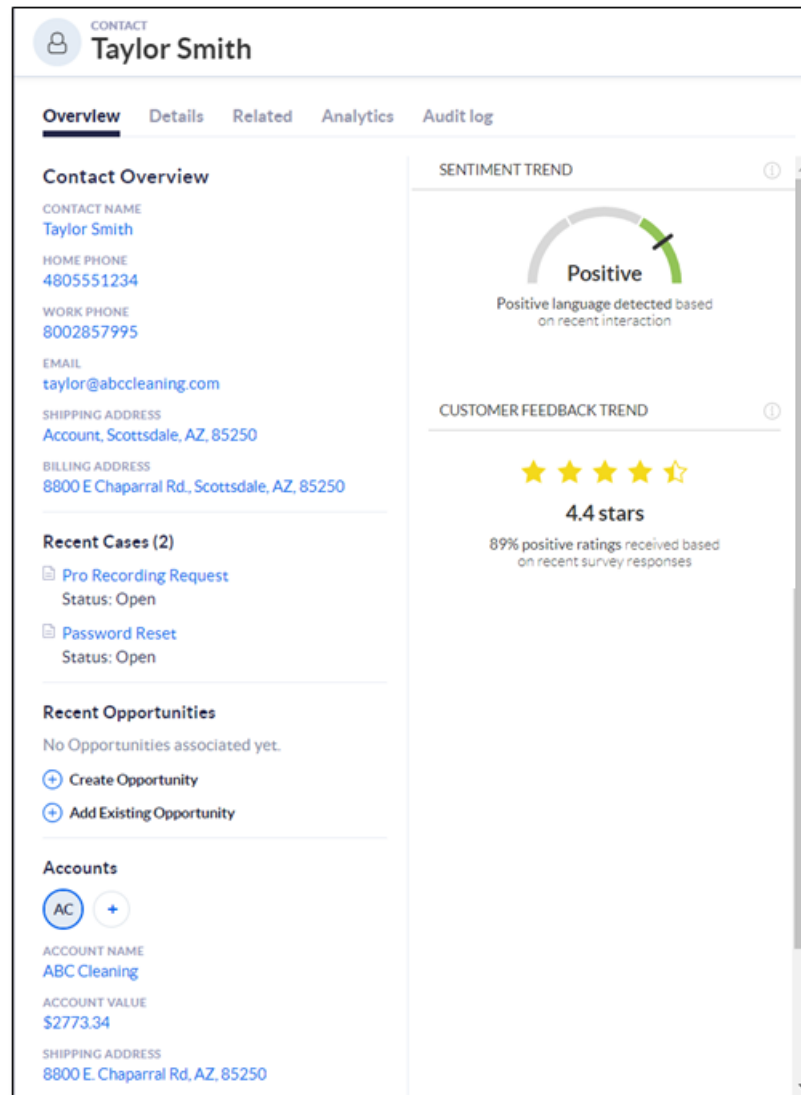
In the **Contact** view, search and select a Contact to view the **Contact Workspace**. The Workspace allows Users to easily view and edit Contact details, Relationships, Interactions, Analytics, and more.



Contact Workspace

## Overview Tab

The **Overview** tab displays necessary Contact information, such as Contact name, phone numbers(s), email, shipping and billing addresses. Recent Cases and Opportunities associated with the Contact also appear on the Overview tab.



**CONTACT**  
Taylor Smith

**Overview** Details Related Analytics Audit log

**Contact Overview**

CONTACT NAME  
Taylor Smith

HOME PHONE  
4805551234

WORK PHONE  
8002857995

EMAIL  
taylor@abccleaning.com

SHIPPING ADDRESS  
Account, Scottsdale, AZ, 85250

BILLING ADDRESS  
8800 E Chaparral Rd., Scottsdale, AZ, 85250

**Recent Cases (2)**

- Pro Recording Request  
Status: Open
- Password Reset  
Status: Open

**Recent Opportunities**  
No Opportunities associated yet.

- Create Opportunity
- Add Existing Opportunity

**Accounts**

AC +

ACCOUNT NAME  
ABC Cleaning

ACCOUNT VALUE  
\$2773.34

SHIPPING ADDRESS  
8800 E. Chaparral Rd, AZ, 85250

**SENTIMENT TREND**

Positive  
Positive language detected based on recent interaction

**CUSTOMER FEEDBACK TREND**

4.4 stars  
89% positive ratings received based on recent survey responses

Overview Tab

## Details Tab

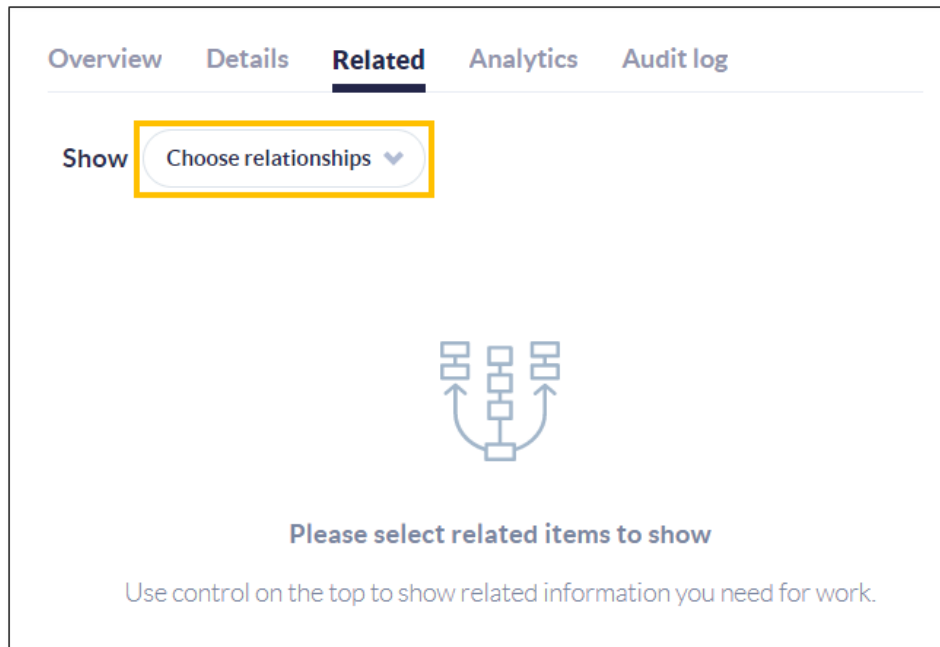
The **Details** tab allows Users to view and edit Contact information, Contact Details and Address Information.

Overview	<b>Details</b>	Related	Analytics	Audit log
<b>Contact Information</b> <span>▼</span>				
CONTACT NAME	Taylor Smith	CONTACT OWNER	kris.johnson@nextiva.com	
PRIMARY OF	ABC Cleaning	TYPE	Customer	
TITLE		PREFERRED NAME		
FIRST NAME	Taylor	BIRTHDATE		
LAST NAME	Smith			
<b>Contact Details</b> <span>▲</span>				
<b>Address Information</b> <span>▲</span>				
<b>System Information</b> <span>▲</span>				
<input type="button" value="Cancel"/> <input type="button" value="Save"/>				

Details Tab

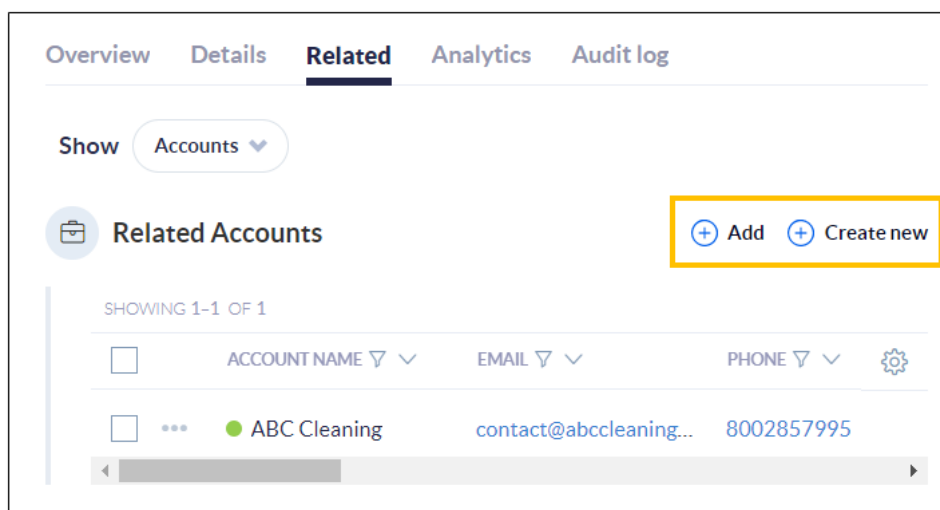
## Related Tab

The **Related** tab displays all relationships associated with the Contact. Click **Choose relationships** and select the desired record type(s) (**Cases, Accounts, Opportunities**) from the drop-down menu.



*Related Tab*

To associate an existing record, such as an Account, with a Contact, hover over the top-right corner above the table and click **Add**. Click **Create new** to automatically associate and create a new record type.

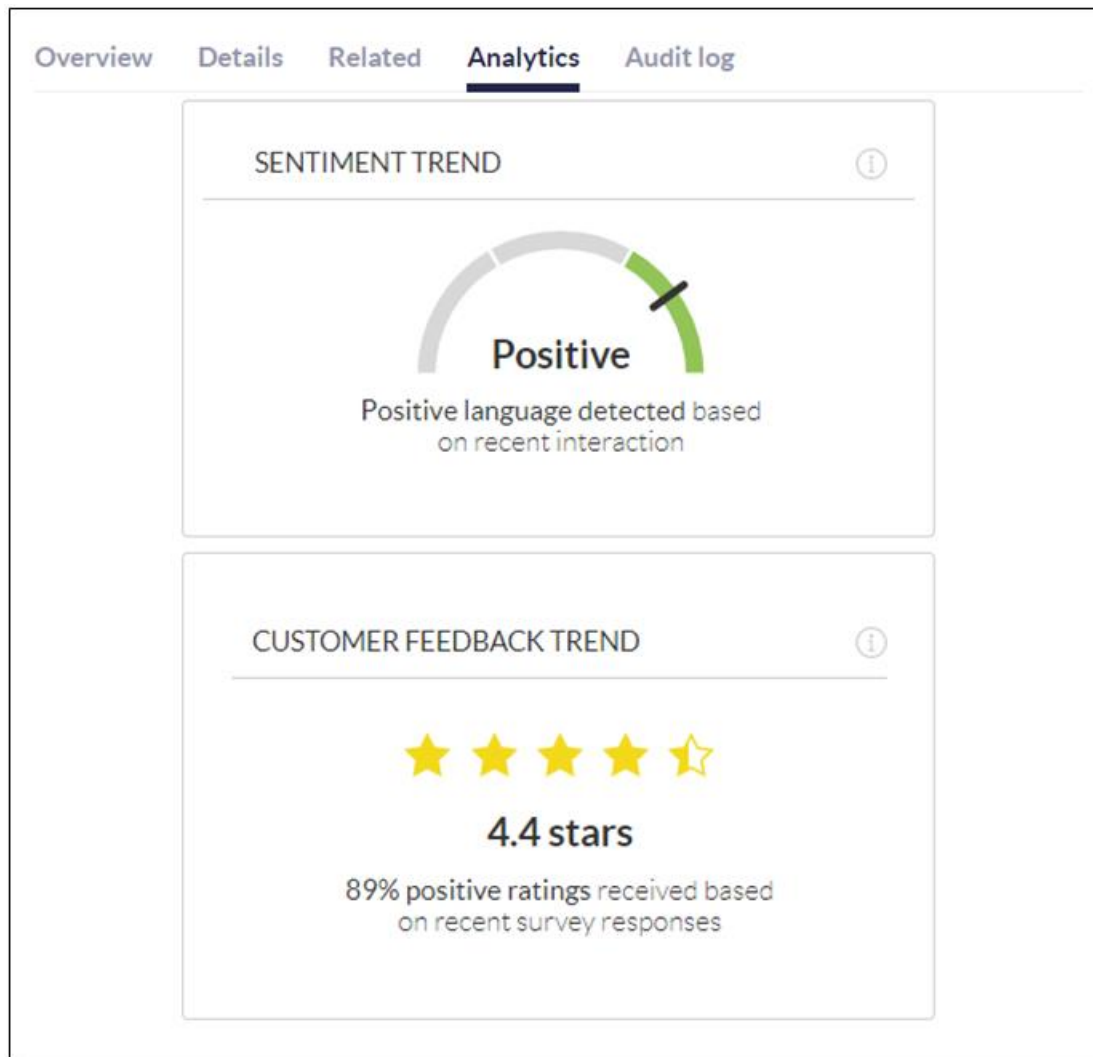


*Add/Create New Options*

## Analytics Tab

On the **Analytics** tab, view and quickly reference the Sentiment Trend and Customer Feedback details.

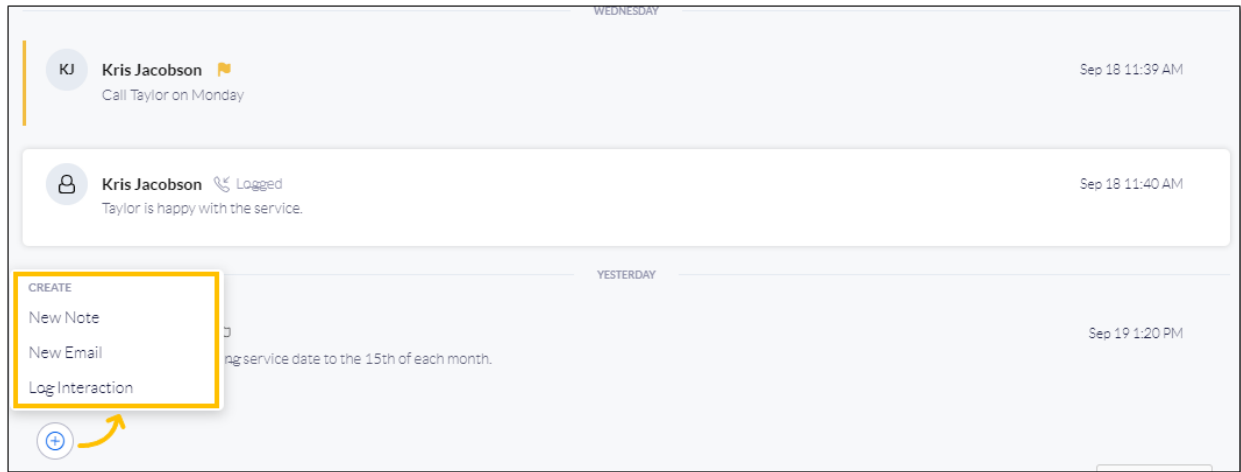
- **Sentiment Trend works to** estimate the customer's current disposition. Nextiva CRM calculates this metric by gathering positive and negative keywords in the Account's activities and SmartTopics. This can be customized based on customer needs and industry.
- **Customer Feedback Trend** reports the outcome of any surveys the customer has completed.



Analytics Tab

## Interaction History

View all recent communication on the **Interaction History** feed to the right of the Workspace. Users can also create a [Note](#), [Email](#), and [Log Interactions](#) by clicking the **Plus (+)** icon on the bottom-left corner of the **Interaction History** feed.



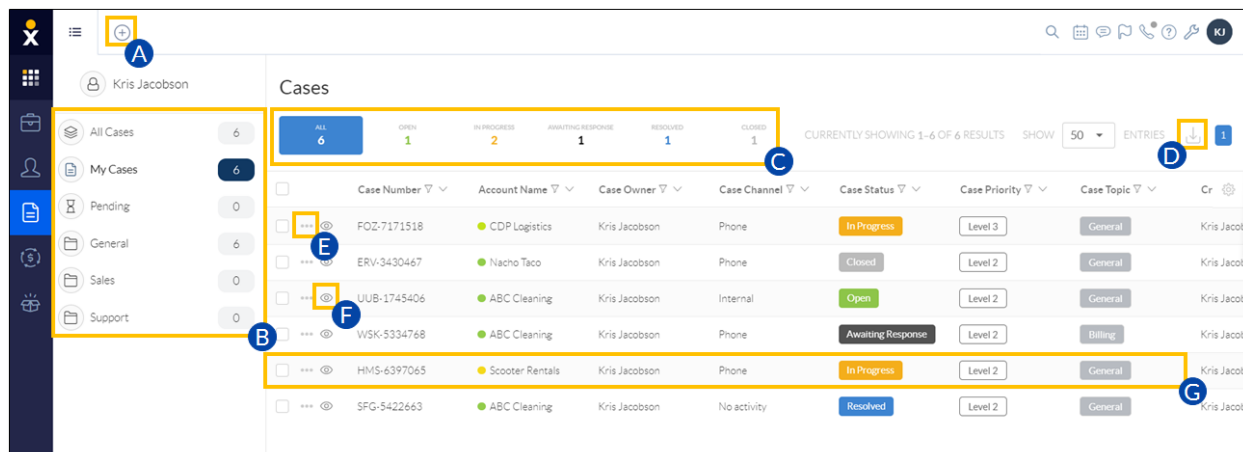
Interaction History Feed

## Cases

Users can track customer issues or requests and customer interactions with **Cases** in Nextiva CRM. Each Case contains:

- A description of the customer's issue or request
- The history of interactions between the company and the customer
- The staff working on the Case
- The company's priority for the Case
- The status of the Case

Click **Case** from the left-panel to view all Cases in Nextiva CRM.



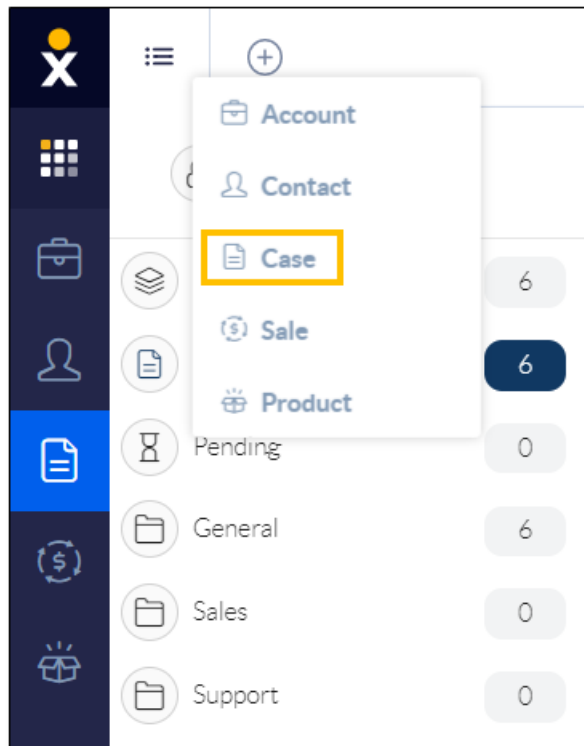
Case View

Users can perform the following actions in Case view:

- Click the **Plus (+)** icon to add a new record (Account, Contact, Case, Lead, Opportunity, Product, or a custom record type).
- Filter and sort Cases by Department.
- Filter and sort Cases by status (**All**, **Open**, **In Progress**, **Awaiting Response**, **Resolved**, and **Closed**).
- Select the checkbox(es) corresponding to the desired Case(s) and click the **Export** icon to export the Cases data to a **.csv** file.
- Click the **Ellipsis (...)** icon corresponding to a Case to open a list of contextual actions, such as **Watch** and **Create Sub Cases**.
- Click the **Eye** icon to preview the Case.
- Click the row corresponding to the Case to view the Case Workspace.

## Creating Cases

1. Click the **Plus (+)** icon and select **Case**.



*Case Option*

2. At the top of the form, enter a **Case Subject** (required).
3. Choose the following parameters from the drop-down lists:
  - **Priority:** The urgency of the Case. The priority defaults to **Urgent**.
  - **Status:** The status of the Case. The status defaults to **Open**.
  - **Department:** The department to which the Case is assigned.
  - **Owner:** The user to which the Case is assigned.
  - **Topic:** The category that best summarizes the Case (required).
4. In the **Description** section, enter a summary of the Case. Users can format the text, insert links, and add [Predefined Text](#).



\* Case Subject

Level 2 Open General Kris Jacobson Add Topic Macros

Description

Interaction History

Arial 16 B I U Text Color Background Color Bulleted List Numbered List Link Unlink Insert

Case Information

Escalated

Cancel Create

+

*New Case Form*

5. Click **Create**. Once the Case is created, Users can create a [Note](#), [Email](#), and [Log Interactions](#) by clicking the **Plus (+)** icon on the bottom-left corner of the **Case Interaction** feed.

**NOTE:** Users can also create and automatically associate Cases from any Workspace under the **Related** tab.

## Case Workspace

In the **Case** view, search and select a Case to view the **Case Workspace**. The Workspace allows Users to easily view and manage Case details, Relationships, Interactions, Analytics, and more.

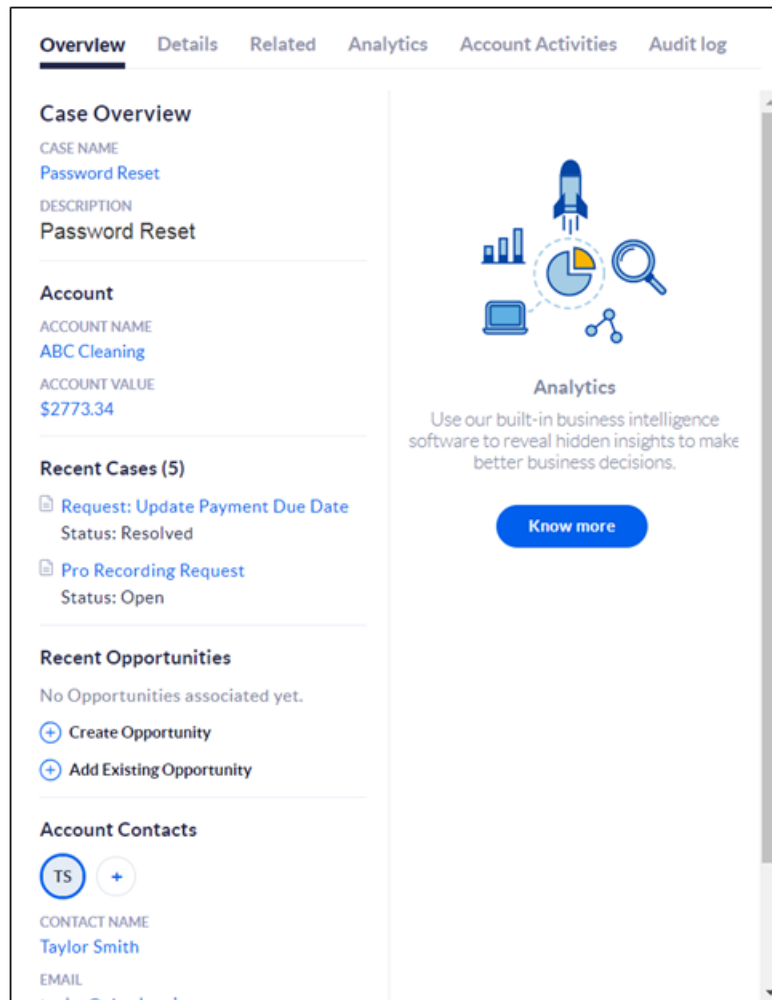
The screenshot displays the 'Case Workspace' for a 'Password Reset' case. The interface is divided into several sections:

- Case Overview:**
  - CASE NAME:** Password Reset
  - DESCRIPTION:** Password Reset
  - Account:**
    - ACCOUNT NAME:** ABC Cleaning
    - ACCOUNT VALUE:** \$2773.34
  - Recent Cases (5):**
    - Request: Update Payment Due Date (Status: Resolved)
    - Pro Recording Request (Status: Open)
  - Recent Opportunities:** No Opportunities associated yet. Options: Create Opportunity, Add Existing Opportunity.
  - Account Contacts:** Taylor Smith (Email: tsmith@abc-cleaning.com)
- Analytics:** A central graphic with a rocket and data icons, accompanied by the text: 'Use our built-in business intelligence software to reveal hidden insights to make better business decisions.' A 'Know more' button is present.
- Interaction History:** A timeline view showing an interaction from 'Kris Jacobson' on 'TUESDAY, OCTOBER 15TH' at 'Oct 15 4:10 PM'. The message reads: 'Hello, Thanks for reaching out. Please use this link to reset your password. We're here to help if you need further assistance. Sincerely, Cu...'

Case Workspace

## Overview Tab

The **Overview** tab displays necessary Case details, including Account and Contact details. Recent Cases and Opportunities associated with the Case also appear on the Overview tab.



The screenshot shows the 'Overview' tab of a software interface. The top navigation bar includes 'Overview' (selected), 'Details', 'Related', 'Analytics', 'Account Activities', and 'Audit log'. The main content is divided into two columns. The left column contains several sections: 'Case Overview' with 'CASE NAME: Password Reset' and 'DESCRIPTION: Password Reset'; 'Account' with 'ACCOUNT NAME: ABC Cleaning' and 'ACCOUNT VALUE: \$2773.34'; 'Recent Cases (5)' listing 'Request: Update Payment Due Date' (Status: Resolved) and 'Pro Recording Request' (Status: Open); 'Recent Opportunities' with the message 'No Opportunities associated yet.' and buttons for 'Create Opportunity' and 'Add Existing Opportunity'; and 'Account Contacts' showing a contact 'Taylor Smith' with initials 'TS' and an email address. The right column features an 'Analytics' section with a graphic of a rocket, bar chart, pie chart, and magnifying glass, and a 'Know more' button. The text below the graphic reads: 'Use our built-in business intelligence software to reveal hidden insights to make better business decisions.'

Case Overview

## Details Tab

The **Details** tab allows Users to view Case information, such as the Case number, owner, last, and interaction date. Users can also view and edit the Case Description.

Overview **Details** Related Analytics Account Activities Audit log

**Description**  
Password reset.

**Case Information** ▼

<b>CASE NUMBER</b> ERV-3430467	<b>OWNER NAME</b> Kris Jacobson
<b>LAST INTERACTION DATE</b> 2019-09-30 05:10 PM	<input type="checkbox"/> Escalated

Details Tab

## Related Tab

The **Related** tab displays all relationships associated with the Case. Click **Choose relationships** and select the desired record type(s) (**Account, Contact, Parent/Sub Cases**) from the drop-down menu.

Overview Details **Related** Analytics Account Activities Audit log

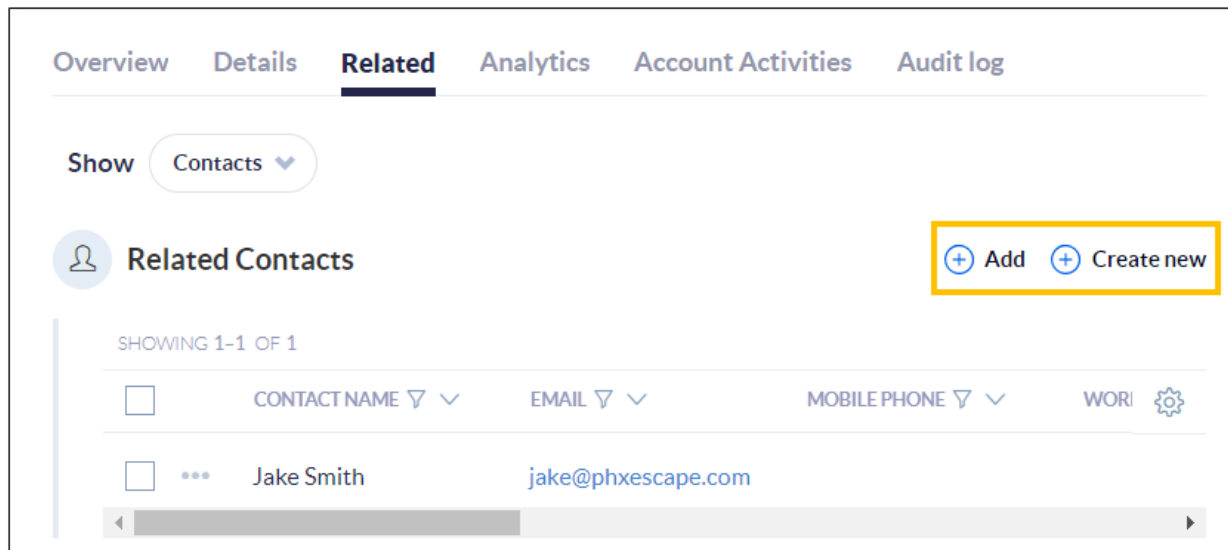
Show Choose relationships ▼

**Please select related items to show**

Use control on the top to show related information you need for work.

Related Tab

To associate an existing record, such as an Account, with a Case, hover over the top-right corner above the table and click **Add**. Click **Create new** to automatically associate and create a new record type. For example, ABC Cleaning calls in wanting to update billing information. The Agent handling the call can associate the new Case with the Account here.



*Add/Create New Options*

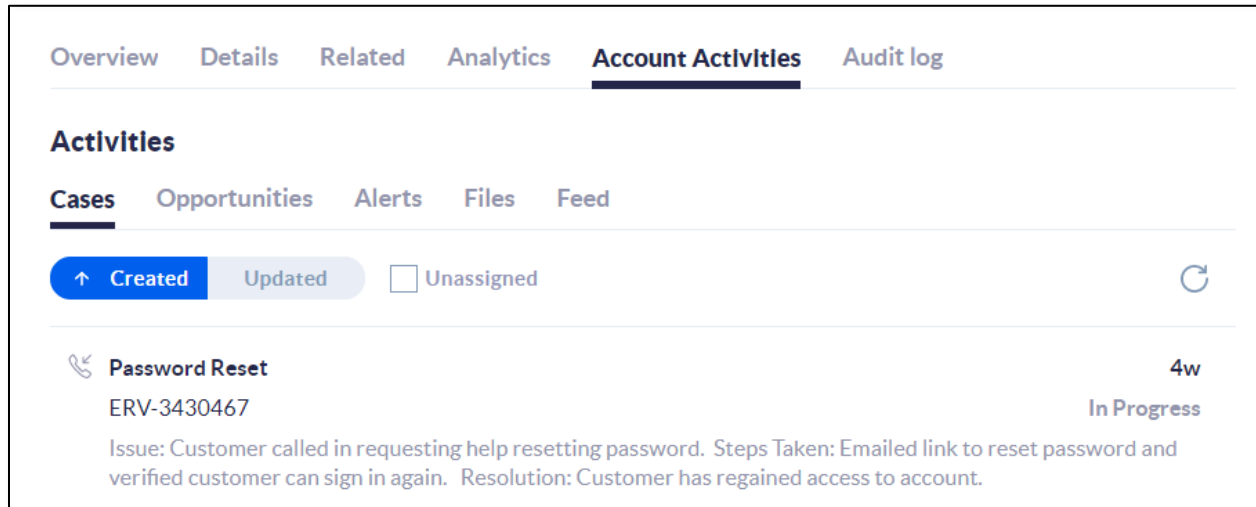
## Analytics Tab

On the **Analytics** tab, view and quickly reference the Sentiment Trend and Customer Feedback details.

- **Sentiment Trend** estimates the customer's current disposition. Nextiva CRM calculates this metric by gathering positive and negative keywords in the Account's activities and SmartTopics. This can be customized based on customer needs and industry.
- **Customer Feedback Trend** reports the outcome of any surveys the customer has completed.

## Account Activities

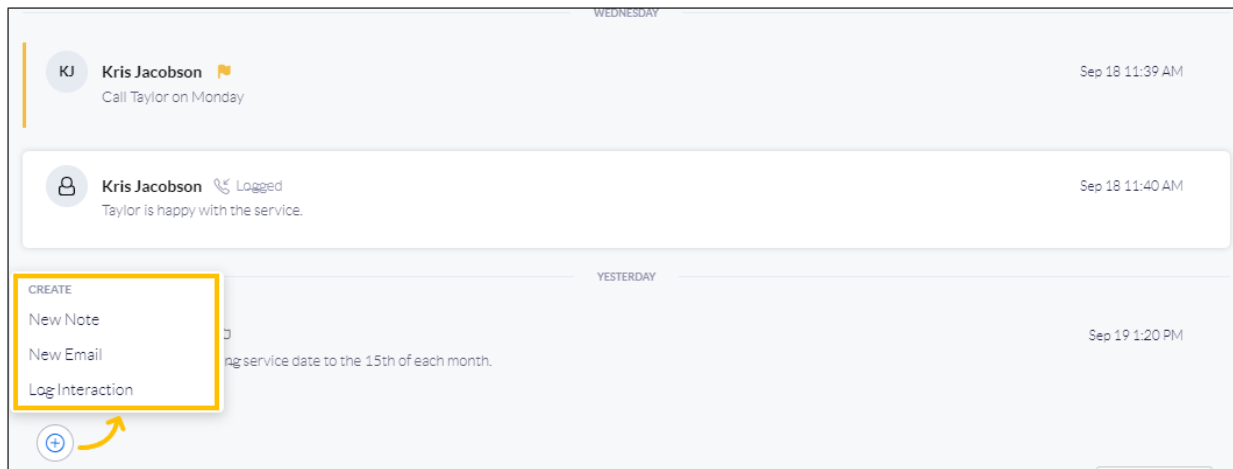
If the case is associated with an Account, the **Account Activities** tab will display all Cases related to the Account. Users can sort Cases by last **Created**, **Updated**, or filter only **Unassigned** Cases.



*Account Activities Tab*

## Interaction History

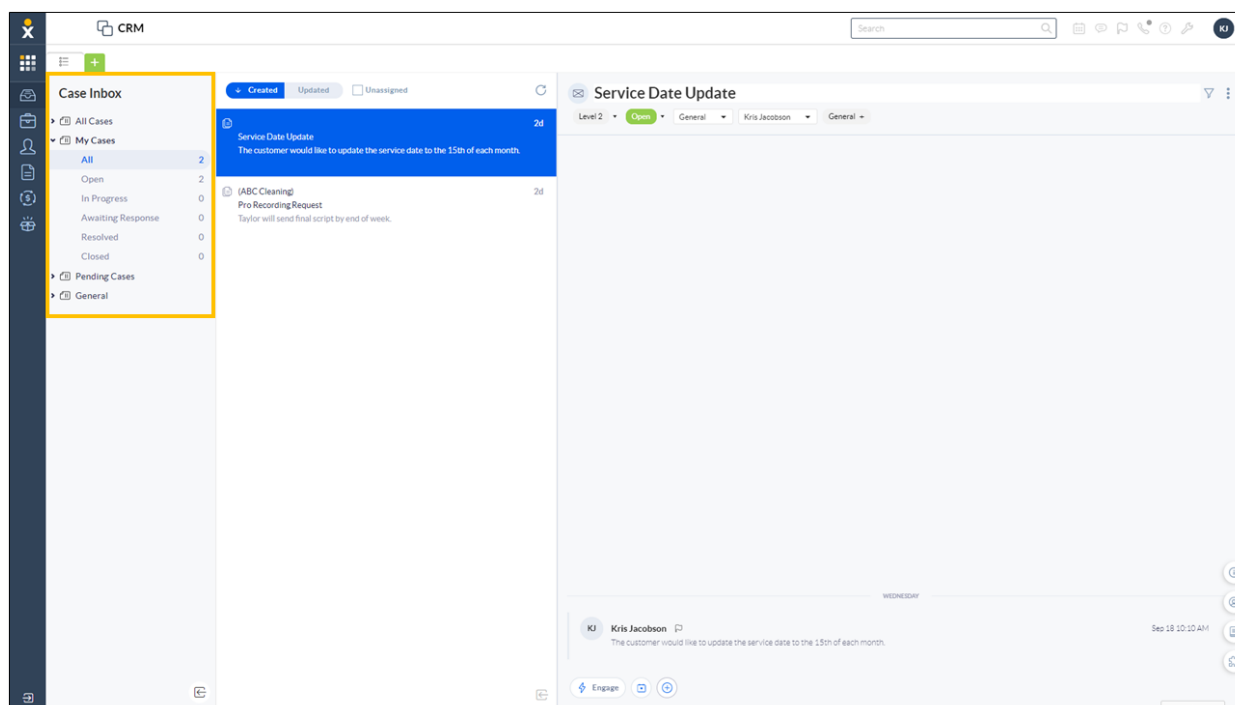
Users can also create a [Note](#), [Email](#), and [Log Interactions](#) by clicking the **Plus (+)** icon on the bottom-left corner of the **Interaction History** feed.



*Interaction History Feed*

## Case Inbox

The **Case Inbox**, the main view for interacting with cases, allows users to filter and sort cases by status (All, Open, In Progress, Awaiting Response, Resolved, and Closed) or by department from the left panel. **Case Inbox** allows users to quickly view and manage cases and interact with clients from one place.



Case Inbox

By default, the **Case Inbox** displays **My Cases** when first opened. My Cases display all Cases assigned to the User. Click any case to view all interactions and details for that case in the right panel.

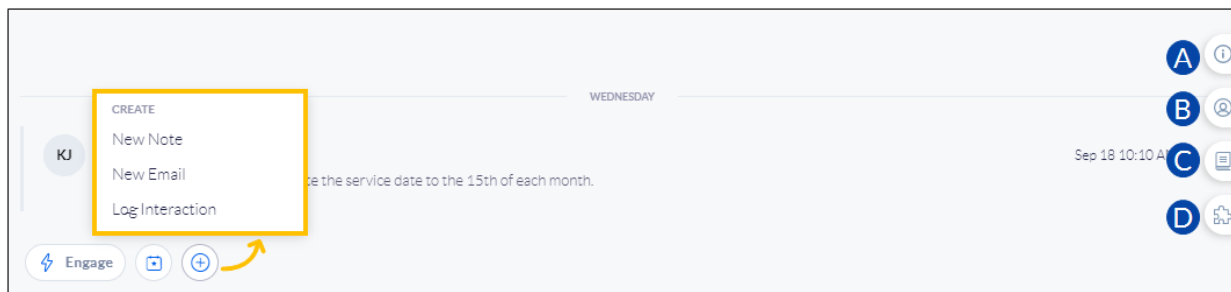


*Case Header*

- A. Edit the case subject by clicking the subject and modifying the text.
- B. Filter case interactions to display all interactions, emails, calls, internal notes, or chats.
- C. Update the priority of the case.
- D. Update the status of the case.
- E. Update the department to which the case is assigned.
- F. Update the owner of the case.
- G. Update the topic that best summarizes the case.

To view the Case Workspace, click the **Engage** button on the bottom-left corner of the **Case Interaction** feed.

Users can also create a [Note](#), [Email](#), and [Log Interactions](#) by clicking the **Plus (+)** icon on the bottom-left corner of the **Interaction History** feed.



*Case Interaction Feed Options*

- A. View high-level case information.
- B. Quickly view contact information and recent activity.
- C. View any internal wiki articles for reference.
- D. View any integrations.



## Leads

**Leads** in Nextiva CRM help Users manage and qualify potential prospects. Creating Leads is the first official stage of the sales life cycle. A “discovery” call occurs during this stage to determine if the lead is “qualified” or not. Once a Lead has been qualified in Nextiva CRM, Users can track it through the remaining stages of the sales life cycle under Opportunities.

Click **Lead** from the left panel to view all Lead records in Nextiva CRM.

Contact Name	Company	Phone	Email	Source	Agent Owner	Name	Created By	Created Date
Kevin Brevski	Brevski Brothers Tap...	8052923198	kevin@bbtaproom.com	Reference	Kris Jacobson	Sales	Kris Jacobson	2019-10-28 10:46 PM
Tia Gutierrez	Mommas and the Tapas	8059080224	tia@mommastapas.com	Phone	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 02:11 PM
Danny Schmidt	24/7 Liquor	3123032927	dan@liquorstore.com	Survey	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 02:05 PM
Mary Logan	Pizza Palace	8002974444	mary@pizzapalace.com	Phone	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 01:56 PM
Ashley Wiggins	Hair by Ashley	7146384576	ash@hairbyashley.com	Web	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 01:39 PM
Matthew Davidson	Davidson Consulting	2064073147	matt@davidson.com	Chat	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 01:36 PM
Barbara Shane	Piece of Cake Bakery	6024903140	barb@pieceofcake.com	Survey	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 01:32 PM
Jenna DuPont	DuPont Formal Wear	6024943328	jenna@formalwear.com	Reference	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 01:30 PM
Timothy Kurts	The Bacon Shop	4802920440	tkurts@baconshop.com	Phone	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 01:26 PM

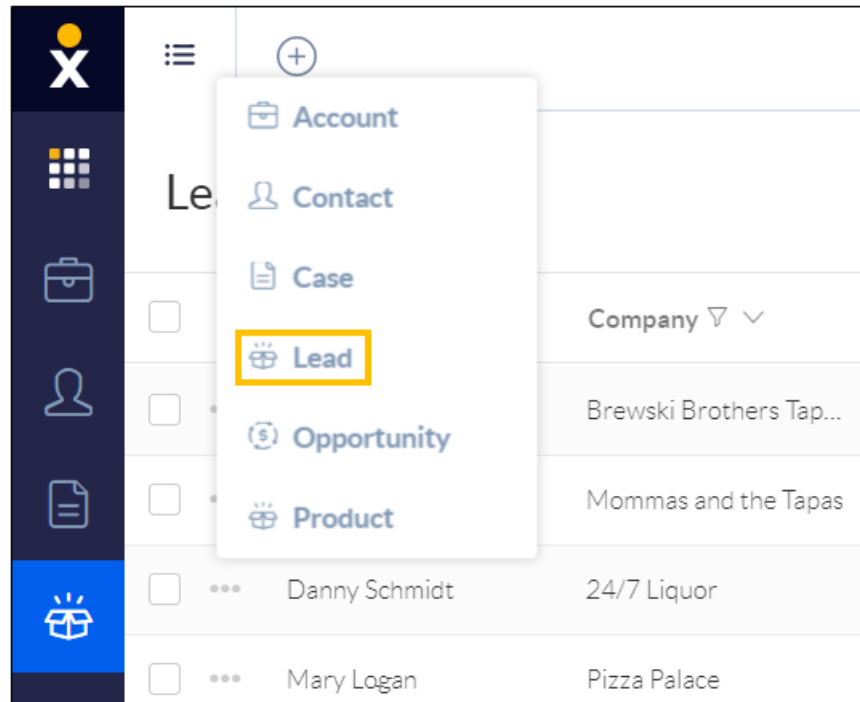
*Lead View*

Users can perform the following actions in Lead view:

- Click the **Plus (+)** icon to add a new record (Account, Contact, Case, Lead, Opportunity, Product, or a custom record type).
- Select the checkbox(es) corresponding to the desired Lead(s) and click the **Export** icon to export the Leads data to a **.csv** file.
- Click the row corresponding to the Lead to view the Lead Workspace.
- Click the **Ellipsis (...)** icon corresponding to a Lead to open a list of contextual actions (**Watch**, **Open in Background**, and **Delete**).


## Creating Leads

1. Click the **Plus (+)** icon and select **Lead**.



*Lead Option*

2. Complete the **New Lead** form. Click **Create**.

 **New Lead**

---

**Lead Details**

CONTACT NAME	COMPANY
<input type="text"/>	<input type="text"/>
OWNER Select...	DEPARTMENT Select...
<input type="text"/>	<input type="text"/>
PHONE +1	EMAIL
<input type="text"/>	<input type="text"/>
FAX	SOURCE Select...
<input type="text"/>	<input type="text"/>
SCORE	AMOUNT \$
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

*New Lead Form*

## Lead Workspace

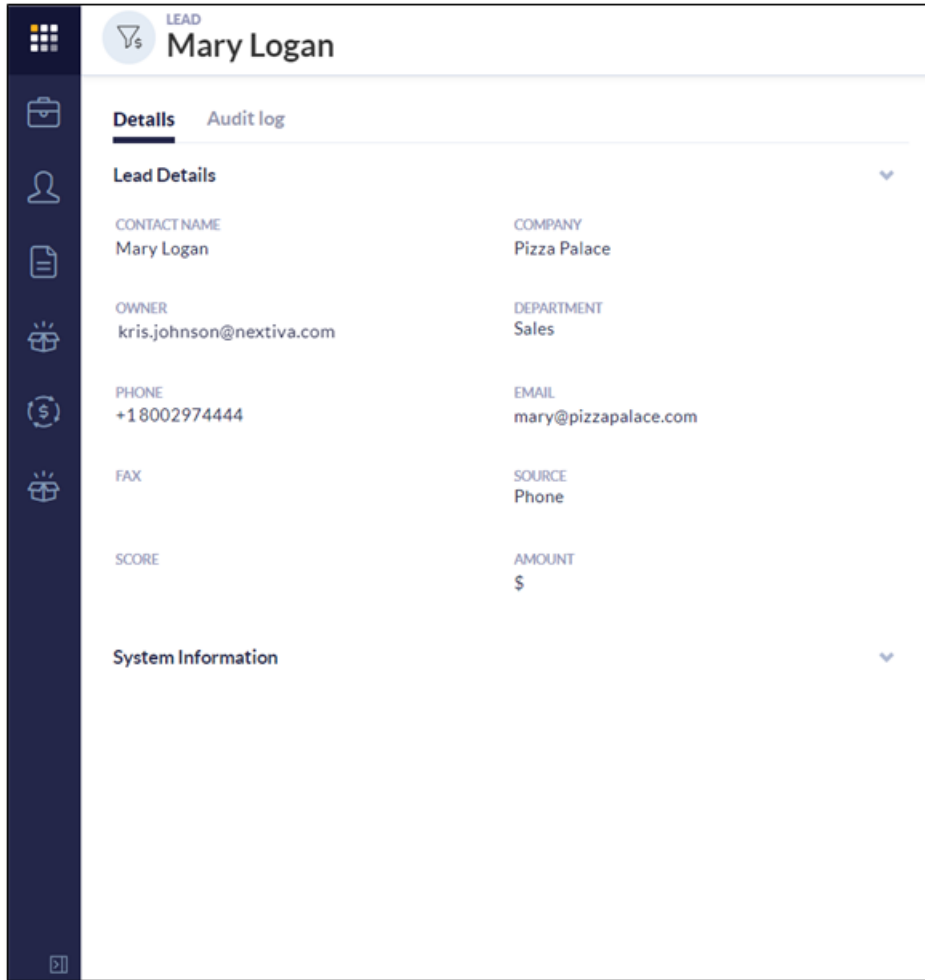
In the **Lead** view, select a Lead to view the **Lead Workspace**. The Workspace allows Users to easily view and edit Lead details, add Interactions, and qualify Leads to Opportunities.

The screenshot displays the Lead Workspace for a lead named Mary Logan. The interface includes a sidebar with navigation icons, a top header with 'LEAD Mary Logan', and two main content areas. The 'Lead Details' area on the left lists contact information: CONTACT NAME (Mary Logan), COMPANY (Pizza Palace), OWNER (kris.johnson@nextiva.com), DEPARTMENT (Sales), PHONE (+18002974444), EMAIL (mary@pizzapalace.com), FAX, SOURCE (Phone), SCORE, and AMOUNT (\$). Below this is a 'System Information' section. The 'Interaction History' area on the right shows a log of interactions, with one entry from Kris Jacobson on Friday, Oct 25 at 1:56 PM, stating that Mary is the owner of Pizza Palace and is looking for an auto attendant solution.

*Lead Workspace*

## Details Tab

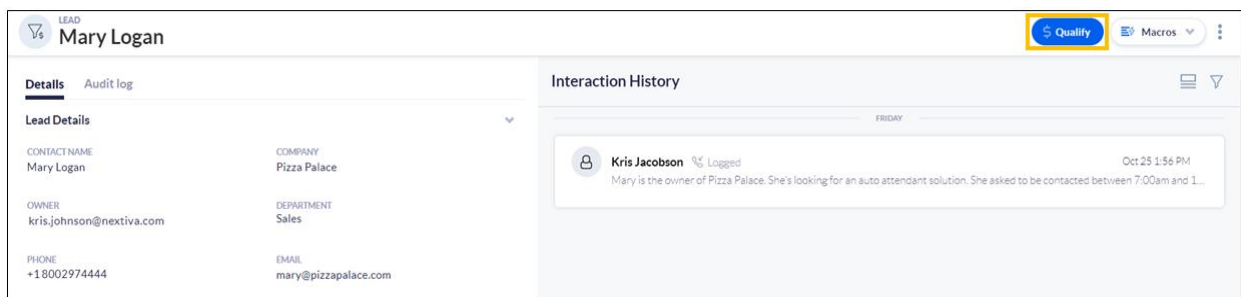
The **Details** tab allows Users to view and edit the Lead information, such as the contact name, company, phone number, email, and more.



Details Tab

## Qualify a Lead

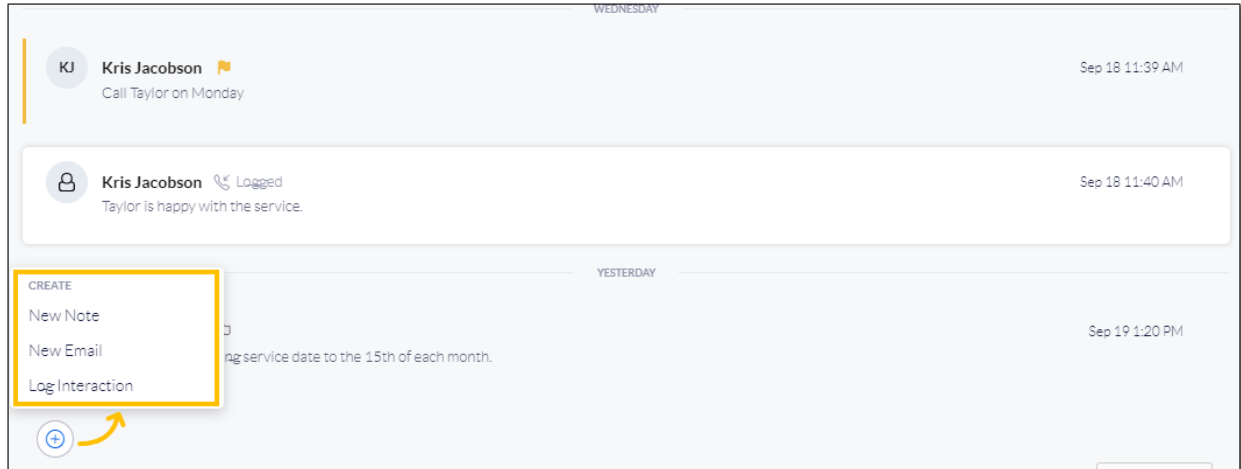
Users can qualify Leads to Opportunities by clicking the **Qualify** button on the top-right corner. Once a Lead has been qualified to an Opportunity, it cannot be moved back to the Lead stage.



Qualify Button

## Interaction History

Users can also create a [Note](#), [Email](#), and [Log Interactions](#) by clicking the **Plus (+)** icon on the bottom-left corner of the **Interaction History** feed.

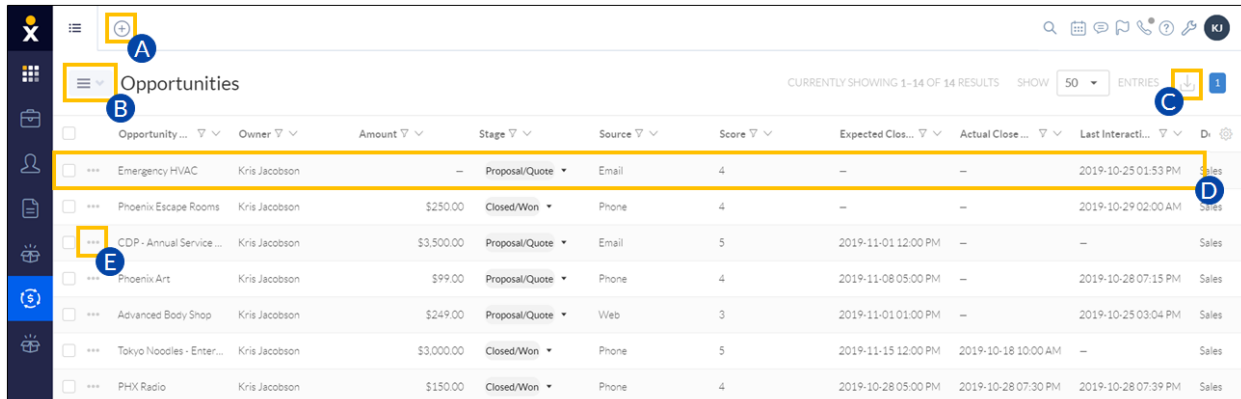


*Interaction History Feed*

## Opportunities

**Opportunities** in Nextiva CRM helps Users manage each stage of the sales life cycle after qualifying a Lead. Users can associate Products to Opportunities to automatically calculate the Product total and display the value of the Opportunity. Users can override the Product total by entering an amount to reflect discounts or markups.

Click **Opportunity** from the left panel to view all Opportunity records in Nextiva CRM.



Opportunity ...	Owner	Amount	Stage	Source	Score	Expected Clos...	Actual Close ...	Last Interacti...	D...
Emergency HVAC	Kris Jacobson		Proposal/Quote	Email	4			2019-10-25 01:53 PM	Sales
Phoenix Escape Rooms	Kris Jacobson	\$250.00	Closed/Won	Phone	4			2019-10-29 02:00 AM	Sales
CDP - Annual Service ...	Kris Jacobson	\$3,500.00	Proposal/Quote	Email	5	2019-11-01 12:00 PM			Sales
Phoenix Art	Kris Jacobson	\$99.00	Proposal/Quote	Phone	4	2019-11-08 05:00 PM		2019-10-28 07:15 PM	Sales
Advanced Body Shop	Kris Jacobson	\$249.00	Proposal/Quote	Web	3	2019-11-01 01:00 PM		2019-10-25 03:04 PM	Sales
Tokyo Noodles - Enter...	Kris Jacobson	\$3,000.00	Closed/Won	Phone	5	2019-11-15 12:00 PM	2019-10-18 10:00 AM		Sales
PHX Radio	Kris Jacobson	\$150.00	Closed/Won	Phone	4	2019-10-28 05:00 PM	2019-10-28 07:30 PM	2019-10-28 07:39 PM	Sales

*Opportunity View*

Users can perform the following actions in Opportunity view:

- Click the **Plus (+)** icon to add a new record (Account, Contact, Case, Lead, Opportunity, Product, or a custom record type).
- Select **Table** or **Board** view. For information, see below.
- Select the checkbox(es) corresponding to the desired Opportunity and click the **Export** icon to export the Opportunities data to a **.csv** file.
- Click the row corresponding to the Opportunity to view the **Opportunity Workspace**.
- Click the **Ellipsis (...)** icon corresponding to an Opportunity to open a list of contextual actions. Users can use this menu as a shortcut to create system records related to the Opportunity.

## Table View

The Table view displays a list of Opportunities as rows in a table with columns of information.

Opportunities										
CURRENTLY SHOWING 1-17 OF 17 RESULTS										
SHOW 50 ENTRIES										
<input type="checkbox"/>	Opportunity ...	Contact Name	Amount	Stage	Source	Score	Expected Clos...	Actual Close...	Last Interact...	Department
<input type="checkbox"/>	*** Mommas and the Tapes	<a href="#">Tia Gutierrez</a>		Needs Assessment	Phone	2			2019-10-28 03:47 PM	Sales
<input type="checkbox"/>	*** Stephanie Small	<a href="#">Stephanie Small</a>	\$1,400.00	Closed/Won	Web		2019-11-07 12:00 AM	2019-11-08 12:00 AM		Sales
<input type="checkbox"/>	*** Brevski Brothers Tap...	<a href="#">Kevin Brevski</a>		Needs Assessment	Reference	2			2019-10-28 10:48 PM	Sales
<input type="checkbox"/>	*** Fast Paint	<a href="#">Mark Townsend</a>		Needs Assessment	Phone	4			2019-10-28 10:21 PM	Sales
<input type="checkbox"/>	*** Emergency HVAC	<a href="#">Don Jacobs</a>		Proposal/Quote	Email	4			2019-10-25 01:53 PM	Sales
<input type="checkbox"/>	*** Phoenix Escape Rooms	<a href="#">Jase Smith</a>	\$250.00	Closed/Won	Phone	4			2019-10-29 02:00 AM	Sales
<input type="checkbox"/>	*** CDP - Annual Service...	<a href="#">Barbara Adams</a>	\$3,500.00	Proposal/Quote	Email	5	2019-11-01 12:00 PM			Sales
<input type="checkbox"/>	*** Phoenix Art	<a href="#">Sean Fountain</a>	\$99.00	Proposal/Quote	Phone	4	2019-11-08 05:00 PM		2019-10-28 07:15 PM	Sales
<input type="checkbox"/>	*** Advanced Body Shop	<a href="#">Terrv Jules</a>	\$249.00	Proposal/Quote	Web	3	2019-11-01 01:00 PM		2019-10-25 03:04 PM	Sales
<input type="checkbox"/>	*** Tokyo Noodles - Enter...	<a href="#">Satoshi Yamakura</a>	\$3,000.00	Closed/Won	Phone	5	2019-11-15 12:00 PM	2019-10-18 10:00 AM		Sales
<input type="checkbox"/>	*** PHX Radio	<a href="#">Donna Jackson</a>	\$150.00	Closed/Won	Phone	4	2019-10-28 05:00 PM	2019-10-28 07:30 PM	2019-10-28 07:39 PM	Sales
<input type="checkbox"/>	*** Monthly Service Cont...	<a href="#">Tavoc Smith</a>	\$99.99	Closed/Won	Phone	5	2019-10-18 01:00 PM	2019-09-27 12:00 AM		Sales
<input type="checkbox"/>	*** Quick Towing Company	<a href="#">Johnny Diaz</a>	\$99.00	Closed/Lost	Other	0			2019-10-28 11:00 PM	Sales
<input type="checkbox"/>	*** 50 User Enterprise Se...	<a href="#">Tony Martinelli</a>	\$1,600.00	Closed/Won	Email	5	2019-10-28 07:30 PM	2019-10-28 08:00 PM	2019-10-28 08:12 PM	Sales
<input type="checkbox"/>	*** Top of the Muffin to Y...	<a href="#">Mr. Ulooman</a>		Value Presentation	Phone	4	2019-10-31 05:00 PM		2019-10-28 08:02 PM	Sales

Table View

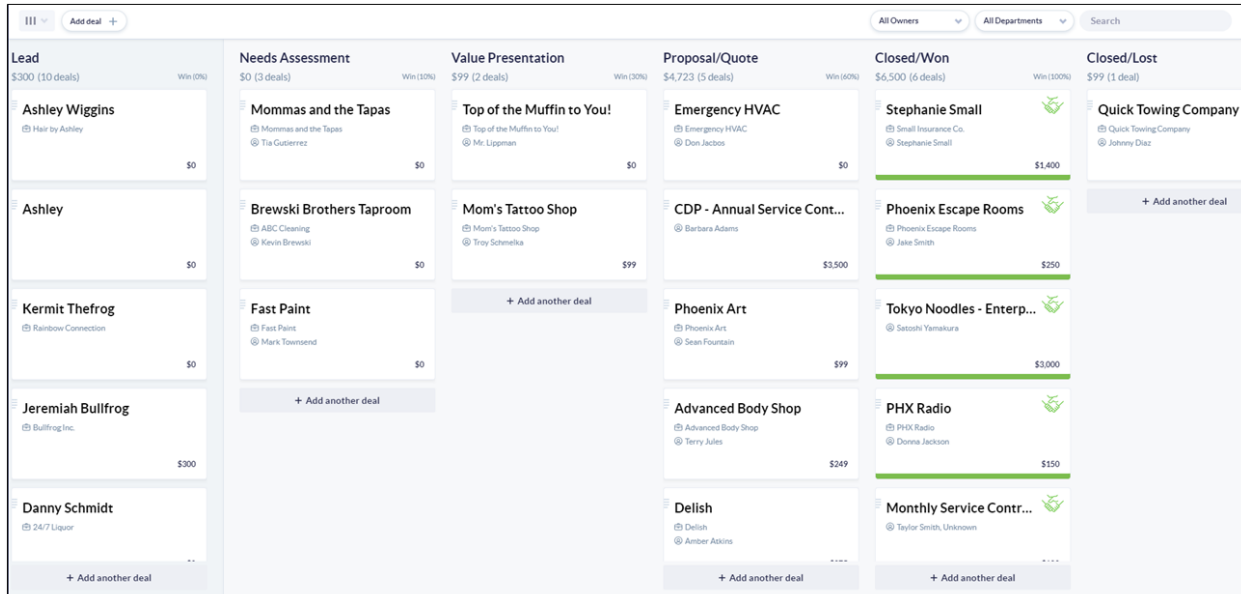
In the **Table** view, Users can easily manage their Opportunities:

- View important Opportunities information such as the Contact, the value of the proposed sale, the current stage of the sale, expected close date, and more.
- Click-and-drag columns to customize the information layout.
- Search, filter, and sort the information in each column.
- Click a record to view and edit the details of an Opportunity.
- Export the Opportunities to a **.csv** file by clicking the **Export** icon at the top-right corner of the window.

## Board View

The **Board** view displays both Leads and Opportunities as tiles on a board that helps Users visualize where prospects are in the sales workflow.





Board View

In the **Board** view, Users can manage and track their sales from start to finish:

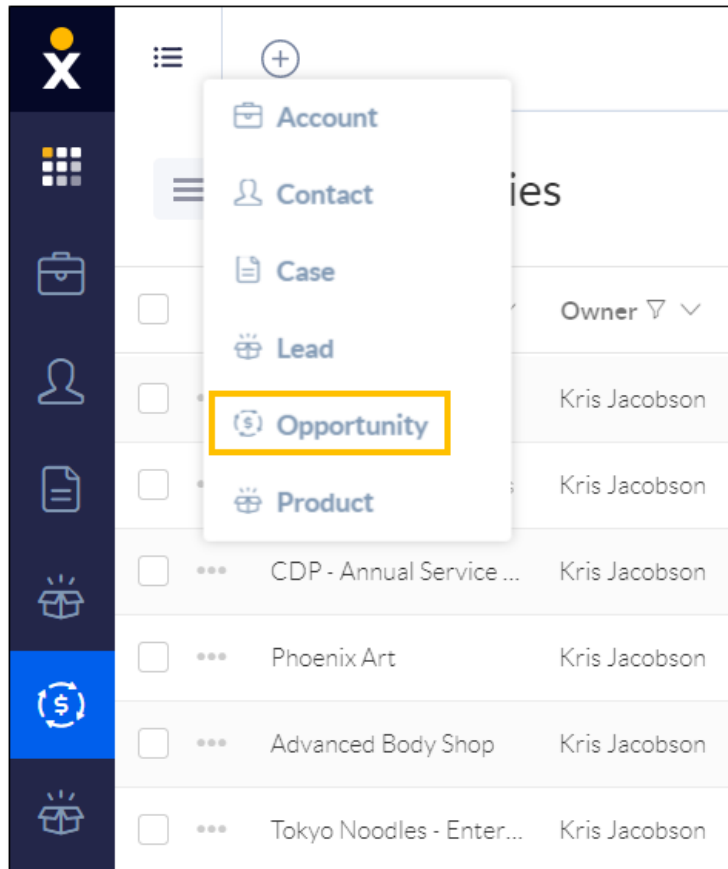
- Qualify a Lead by clicking-and-dragging the tile from the **Lead** column to the first **Opportunity** column.

**NOTE:** Once a Lead is qualified, Users cannot click-and-drag the tile back to the **Lead** column.

- Move Opportunities through the stages of a sale (**Needs Assessment**, **Value Presentation** (demo), **Proposal/Quote**, and **Closed/Won** or **Closed/Lost**).
- View how much revenue is in the sales pipeline by stage.
- Add a new Opportunity by clicking the **Add deal +** button at the top-left corner of the window or the **+Add another deal** button at the bottom of any column but the **Lead** column.
- Add a new Lead by clicking the **+Add another deal** button at the bottom of the **Lead** column.
- Filter by **Owner** and **Department**.
- Search by **Lead** and **Opportunity** name.
- Click the record name to view and edit the details of that record.

## Creating Opportunities

1. Click the **Plus (+)** icon and select **Opportunity**.



*Opportunity Option*

2. Complete the **Opportunity Details** section:
  - **Opportunity Name:** The name of the Opportunity (required).
  - **Primary Contact:** The Contact associated with the new Opportunity (required).
  - **Account:** The Account associated with the new Opportunity.
  - **Owner:** The agent who owns the Opportunity.
  - **Department:** The department the Owner is assigned to.
  - **Amount:** The value of the proposed sale.
  - **Stage:** The current phase of the sale (required):
    - **Needs Assessment:** Learning more about the prospect, their business needs, and their pain points with their existing product, and getting details to identify a product package you can provide to them.
    - **Value Presentation:** Demonstrating products and presenting information to show how your product solves the needs identified in the Needs Assessment Stage.

- **Proposal/Quote:** This stage varies widely from company to company, and may include things like delivering a quote or proposal.
- **Closed Won/Lost:** As the sales process comes to a close, the sales rep asks the prospect to finalize the deal, which ends in either a win or loss of a sale.
- **Source:** The channel by which the lead was initially presented (Phone, Email, Web, etc.)
- **Expected Close Date:** The expected date to close the sale.
- **Actual Close Date:** The date the sale is closed.

3. Click Create.

\$

## New Opportunity

**Opportunity Details**

**OPPORTUNITY NAME \***

---

**PRIMARY CONTACT \***

Select...

**ACCOUNT**

Select...

**OWNER**

playgametest4041@gmail.com

**DEPARTMENT**

Select...

**AMOUNT**

\$

**STAGE \***

Select...

**SOURCE**

Select...

**SCORE**

**EXPECTED CLOSE DATE**

---

**ACTUAL CLOSE DATE**

---

Cancel
Create

Opportunity Details

## Opportunity Workspace

In the **Opportunity** view, search and select an Opportunity to view the **Opportunity Workspace**. The Workspace allows Users to easily view and edit Opportunity details, Relationships, Analytics, Interactions, and more.

The screenshot displays the Opportunity Workspace for 'Phoenix Escape Rooms'. The interface is divided into several sections:

- Overview Tab:** Shows key details for the Opportunity:
  - NAME:** Phoenix Escape Rooms
  - STAGE:** Closed/Won
  - AMOUNT:** \$250
  - PROBABILITY:** 100
- Contacts:** Lists associated contacts, including:
  - CONTACT NAME:** Jake Smith
  - EMAIL:** jake@phxescape.com
  - PHONE:** 4802700403
  - LAST ACTIVITY:** Jake owns three escape rooms in Phoenix, AZ, ...
- Account:** Shows the associated account:
  - ACCOUNT NAME:** Phoenix Escape Rooms
- Analytics:**
  - SENTIMENT TREND:** A gauge chart showing 'Positive' sentiment, with the text 'Positive language detected based on recent interaction'.
  - CUSTOMER FEEDBACK TREND:** A star rating system showing '4.4 stars' and '89% positive ratings received based on recent survey responses'.
- Interaction History:** A log of recent interactions, including:
  - Kris Jacobson** Logged at 2:00 AM: 'Jake owns three escape rooms in Phoenix, AZ. He's looking to outfit his locations with service within the next month. He pr...'

Opportunity Workspace

## Overview Tab

The **Overview** tab displays necessary Opportunity information, such as Contact name, phone numbers(s), email, and shipping and billing addresses. Contacts and Accounts associated with the Opportunity also appear on the Overview tab.

The screenshot displays the 'Overview' tab for an opportunity named 'Phoenix Escape Rooms'. The page is divided into several sections:

- Opportunity Overview:**
  - NAME:** Phoenix Escape Rooms
  - STAGE:** Closed/Won
  - AMOUNT:** \$250
  - PROBABILITY:** 100
- Contacts:**
  - Profile icon: JS
  - CONTACT NAME:** Jake Smith
  - EMAIL:** jake@phxescape.com
  - PHONE:** 4802700403
  - LAST ACTIVITY:** Jake owns three escape rooms in Phoenix, AZ. ...
- Account:**
  - ACCOUNT NAME:** Phoenix Escape Rooms
- SENTIMENT TREND:** A gauge chart showing a 'Positive' sentiment. Text below reads: 'Positive language detected based on recent interaction'.
- CUSTOMER FEEDBACK TREND:** A star rating of 4.4 stars. Text below reads: '89% positive ratings received based on recent survey responses'.

Overview Tab

## Details Tab

The **Details** tab allows Users to view and edit the Opportunity information, such as the amount, the current stage, and more. Users can also view and edit the Contact and Account associated with the Opportunity.

\$

OPPORTUNITY

## Phoenix Escape Rooms

Overview
Details
Related
Analytics
Account Activities
Audit log

**Opportunity Details** ▼

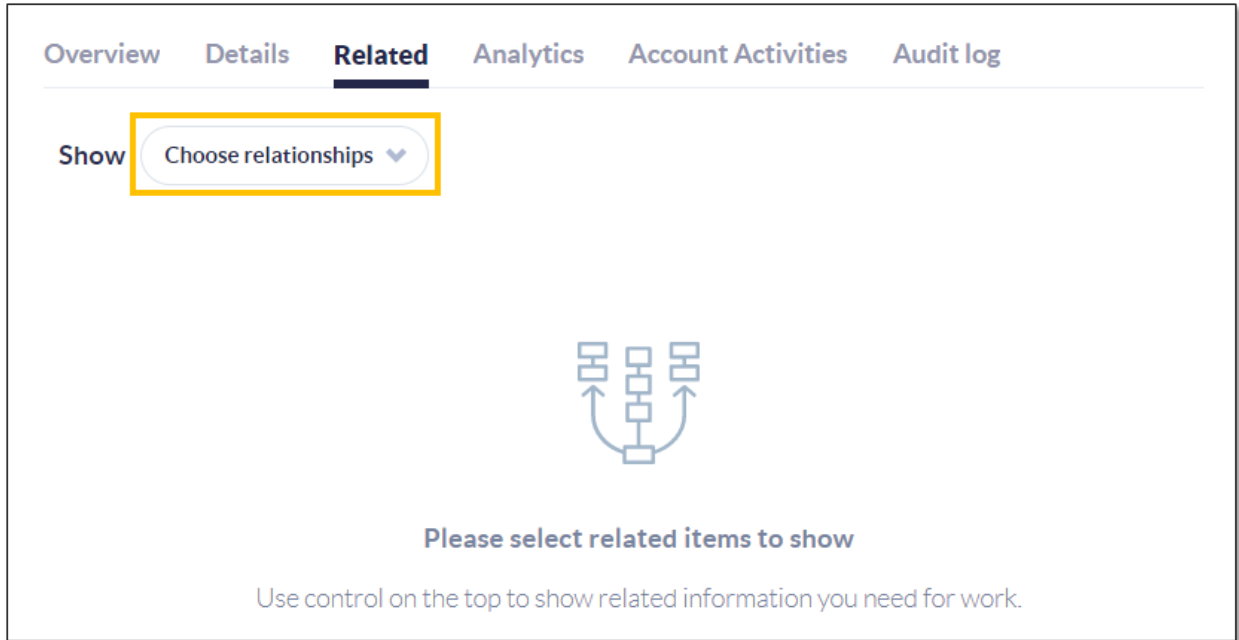
**OPPORTUNITY NAME**  
Phoenix Escape Rooms

<b>PRIMARY CONTACT</b> Jake Smith	<b>ACCOUNT</b> Phoenix Escape Rooms
<b>OWNER</b> kris.johnson@nextiva.com	<b>DEPARTMENT</b> Sales
<b>AMOUNT</b> \$250	<b>QUOTED AMOUNT</b>
<b>STAGE</b> Closed/Won	<b>SOURCE</b> Phone
<b>SCORE</b> 4	<b>PROBABILITY</b> 100
<b>EXPECTED CLOSE DATE</b>	<b>ACTUAL CLOSE DATE</b>

*Details Tab*

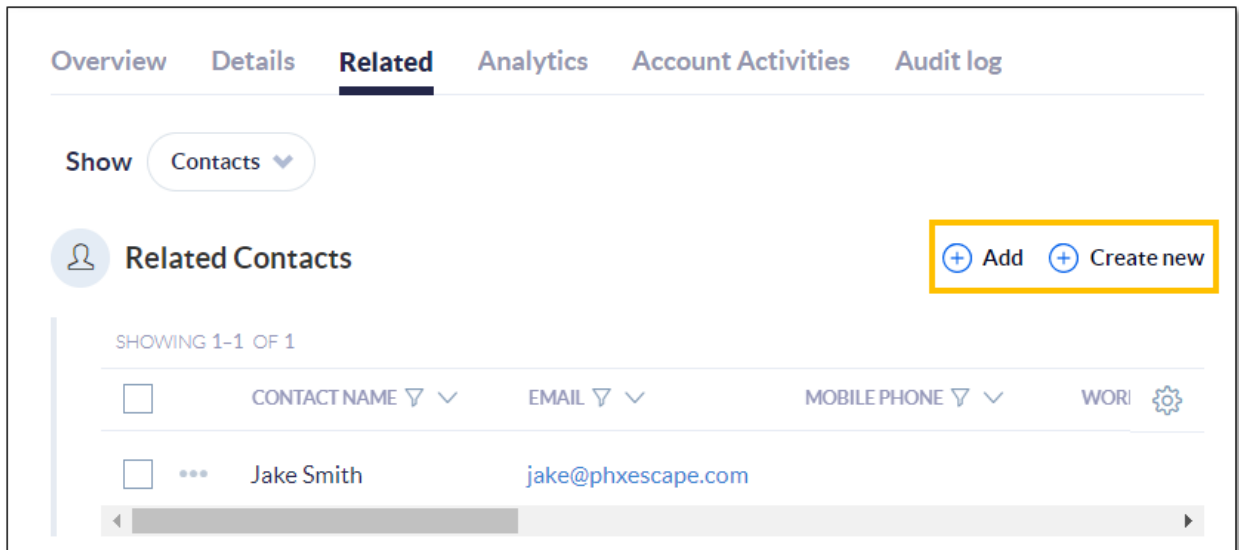
## Related Tab

The **Related** tab displays all relationships associated with the Opportunity. Click **Choose relationships** and select the desired record type(s) (**Attachments, Contacts, Products**) from the drop-down menu.



*Related Tab*

To associate an existing record, such as an Account, with an Opportunity, hover over the top-right corner above the table and click **Add**. Click **Create new** to automatically associate and create a new record type.



*Add/Create New Options*

## Analytics Tab

On the **Analytics** tab, view and quickly reference the Sentiment Trend and Customer Feedback details.

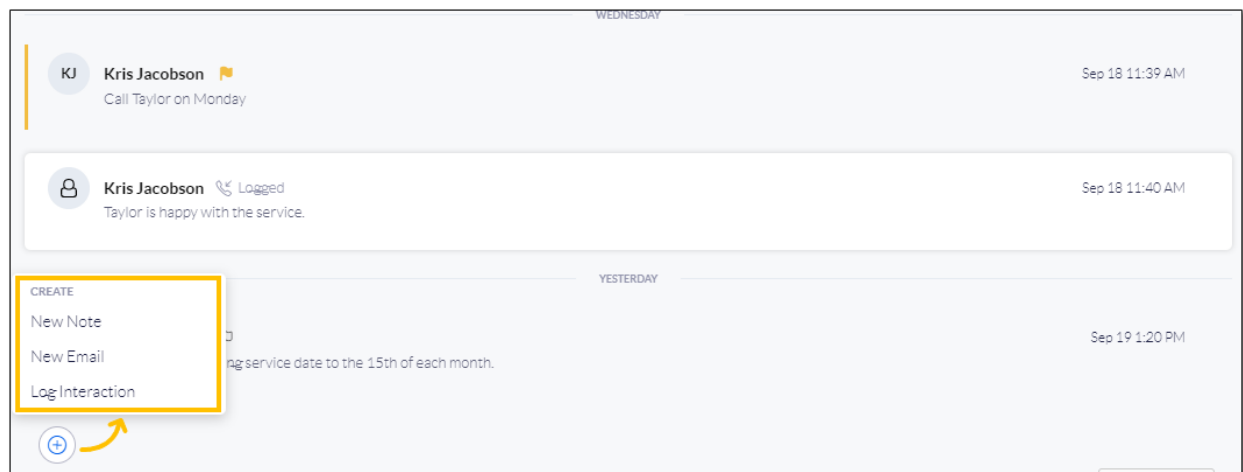
- **Sentiment Trend** works to estimate the most recent customer's disposition. Nextiva CRM calculates this metric by gathering positive and negative keywords in the Account's activities and SmartTopics. This can be customized based on customer needs and industry.
- **Customer Feedback Trend** reports the outcome of any surveys the customer has completed.

## Account Activities

If the case is associated with an Account, the **Account Activities** tab will display all Cases related to the Opportunity. Users can sort Cases by last **Created**, **Updated**, or filter only **Unassigned** Cases.

## Interaction History

Users can also create a [Note](#), [Email](#), and [Log Interactions](#) by clicking the **Plus (+)** icon on the bottom-left corner of the **Interaction History** feed.



*Interaction History Feed*



## Products

**Products** represent the goods or services that a company offers. Users can add multiple Products to Nextiva CRM and assign a dollar amount to each Product. Users can then associate Products to an Opportunity, and the Product amounts are added together to display the product total.

Click **Product** from the left-panel to view all Product records in Nextiva CRM.

Product Name	Amount	Created By	Created Date
One-Time Cleaning Se...	\$119.99	Kris Jacobson	2019-09-23 05:14 PM
Monthly Service Cont...	\$99.99	Kris Jacobson	2019-10-14 04:26 PM
Yearly Service Contract	\$1,200.00	Kris Jacobson	2019-09-30 10:11 AM

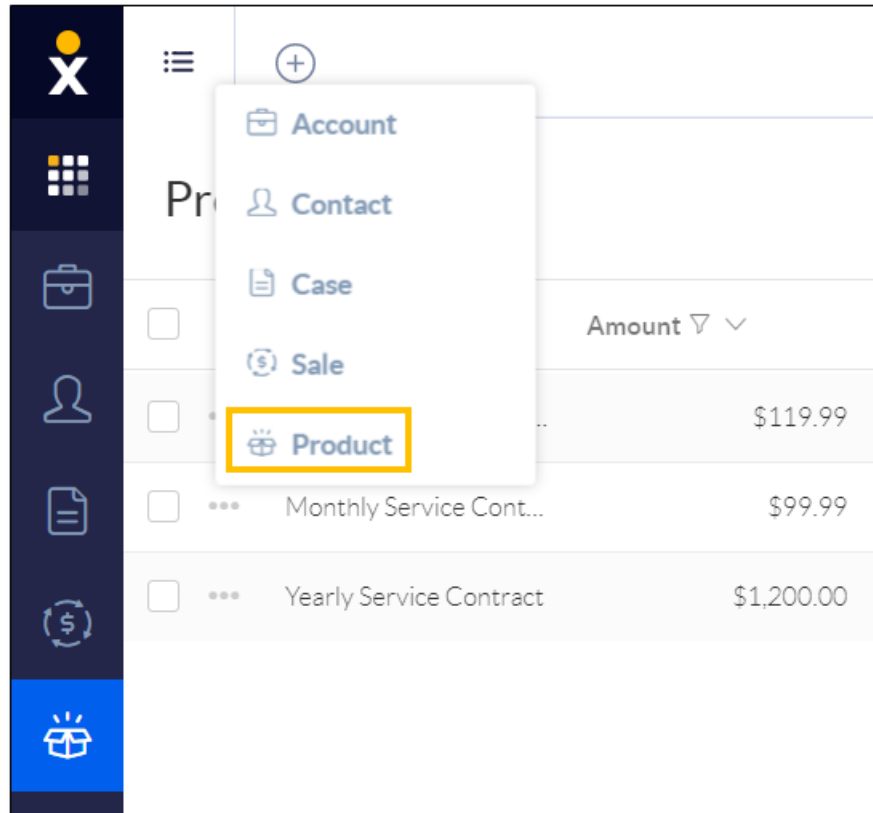
*Product View*

Users can perform the following actions in Product view:

- Click the **Plus (+)** icon to add a new record (Account, Contact, Case, Lead, Opportunity, Product, or a custom record type).
- Select the checkbox(es) corresponding to the desired Product(s) and click the **Export** icon to export the Product data to a **.csv** file.
- Click the **Ellipsis (...)** icon corresponding to a Product to open a list of contextual actions. Users can use this menu as a shortcut to create system records related to the Product.
- Click the row corresponding to the Product to view the Product Workspace.

## Creating Products

1. Click the **Plus (+)** icon and select **Product**.

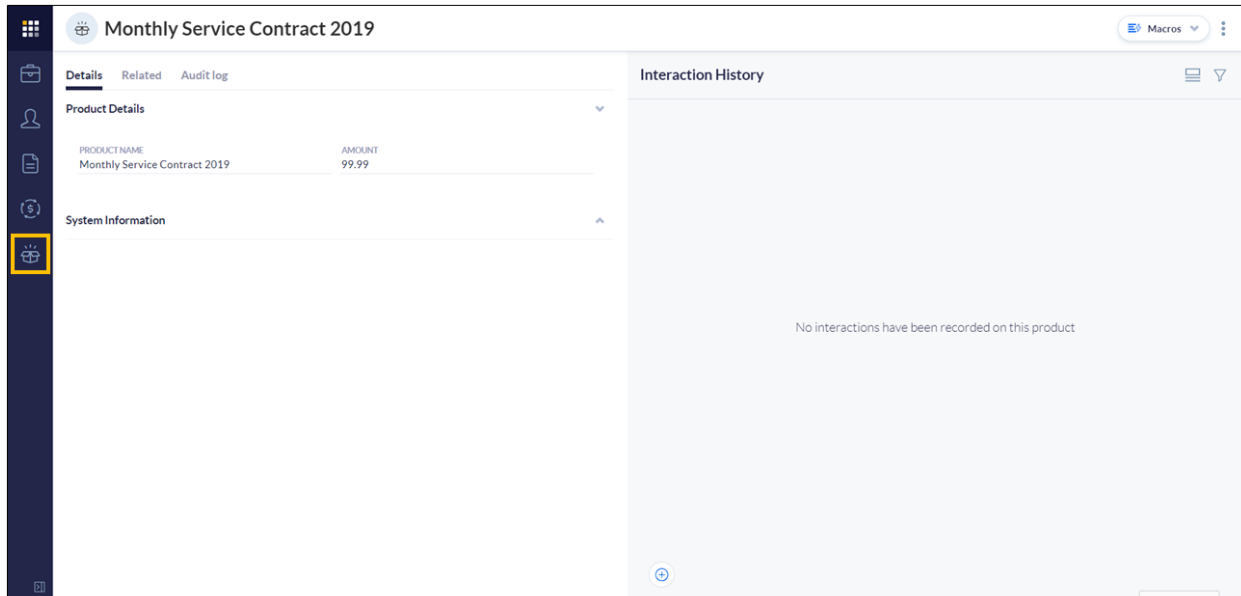


*Product Option*

2. Enter a **Product Name** and **Amount**. Click **Create**.

## Product Workspace

In the **Product** view, search and select a Product to view the **Product Workspace**. The Workspace allows Users to easily view and edit Product details, Relationships, Interactions, and more.



*Product Workspace*

## Details Tab

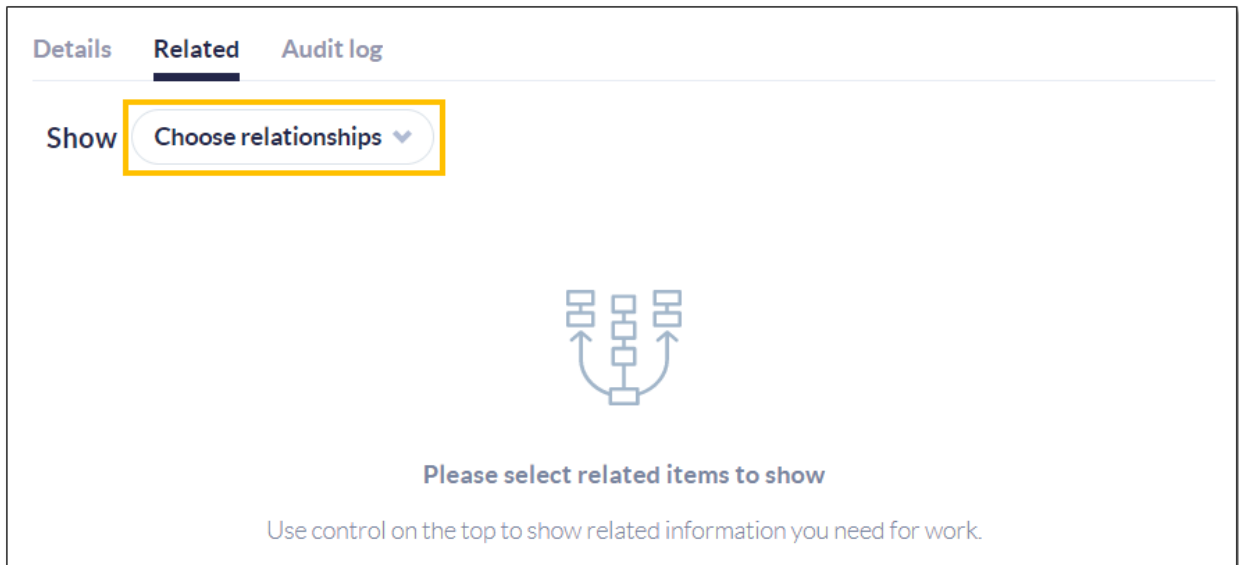
The **Details** tab allows Users to view and edit the Product information, such as the product name and amount.



*Details Tab*

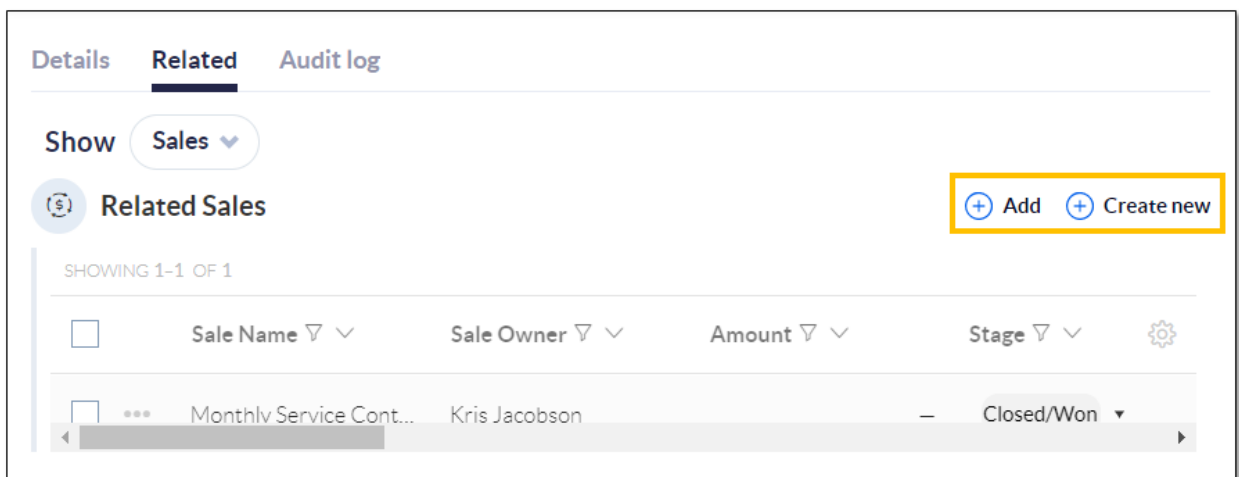
## Related Tab

The **Related** tab displays all Opportunities associated with the Product. Click **Choose relationships** and select **Opportunities** from the drop-down menu.



*Related Tab*

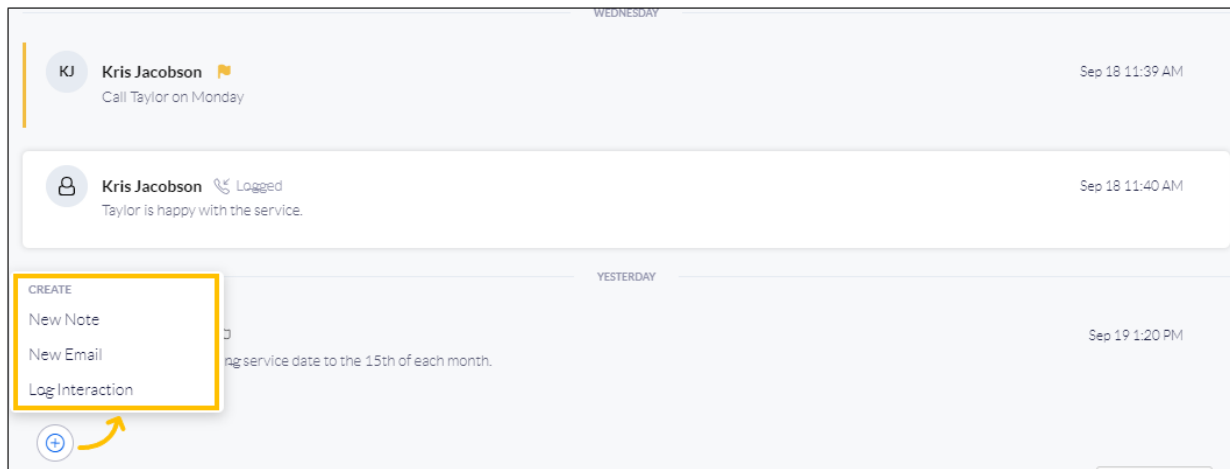
To associate an existing record, such as an Opportunity, with a Product, hover over the top-right corner above the table and click **Add**. Click **Create new** to automatically associate and create a new record type.



*Add/Create New Options*

## Interaction History

Users can also create a [Note](#), [Email](#), and [Log Interactions](#) by clicking the **Plus (+)** icon on the bottom-left corner of the **Interaction History** feed.



*Interaction History Feed*

## Notes

**Notes** are brief internal records of information associated with a Nextiva CRM record (i.e. Account, Contact, Case, Lead, Opportunity, Product, and any custom entities). Notes provide information about customer interactions so that other agents who interact with the same customers can view previous interactions. For example, an agent adds a note about a call they received from a customer about an issue for which a case is opened. If other agents work on that case, they can refer to the note about that call.

### Adding Notes

Users can add **Notes** associated with any Nextiva CRM Record in the related **Workspace** under the **Interaction History** panel. Users can format the text, insert links, and add [Predefined and Macros](#) when creating Notes.

The screenshot displays the 'Interaction History' window. At the top, there is a header with the title 'Interaction History' and two icons: a list icon and a filter icon. Below the header, a date separator indicates 'WEDNESDAY, SEPTEMBER 18TH'. A message from 'KJ Kris Jacobson' is shown, dated 'Sep 18 10:10 AM', with the text: 'The customer would like to update the payment date to the 15th of each month.&nbsp;'. Below the message, there are two circular icons: one with a calendar icon and one with a plus sign. A 'Note' dialog box is open, highlighted with a yellow border. The dialog has a title 'Note' and a text area containing the placeholder 'Write a note.'. Below the text area is a toolbar with icons for text formatting (bold, italic, underline), link, unlink, insert image, play, and flag. At the bottom of the dialog are two buttons: 'Save' (in blue) and 'Cancel' (in grey).

*New Note*

## Flagging Notes

Flag Notes to alert anyone who views the Nextiva CRM Record. When an agent flags a Note in an Account, that Note will pop up every time anyone views that Account.

Flag notes by clicking the **Flag** icon while adding or editing a Note.

## Interacting via Email

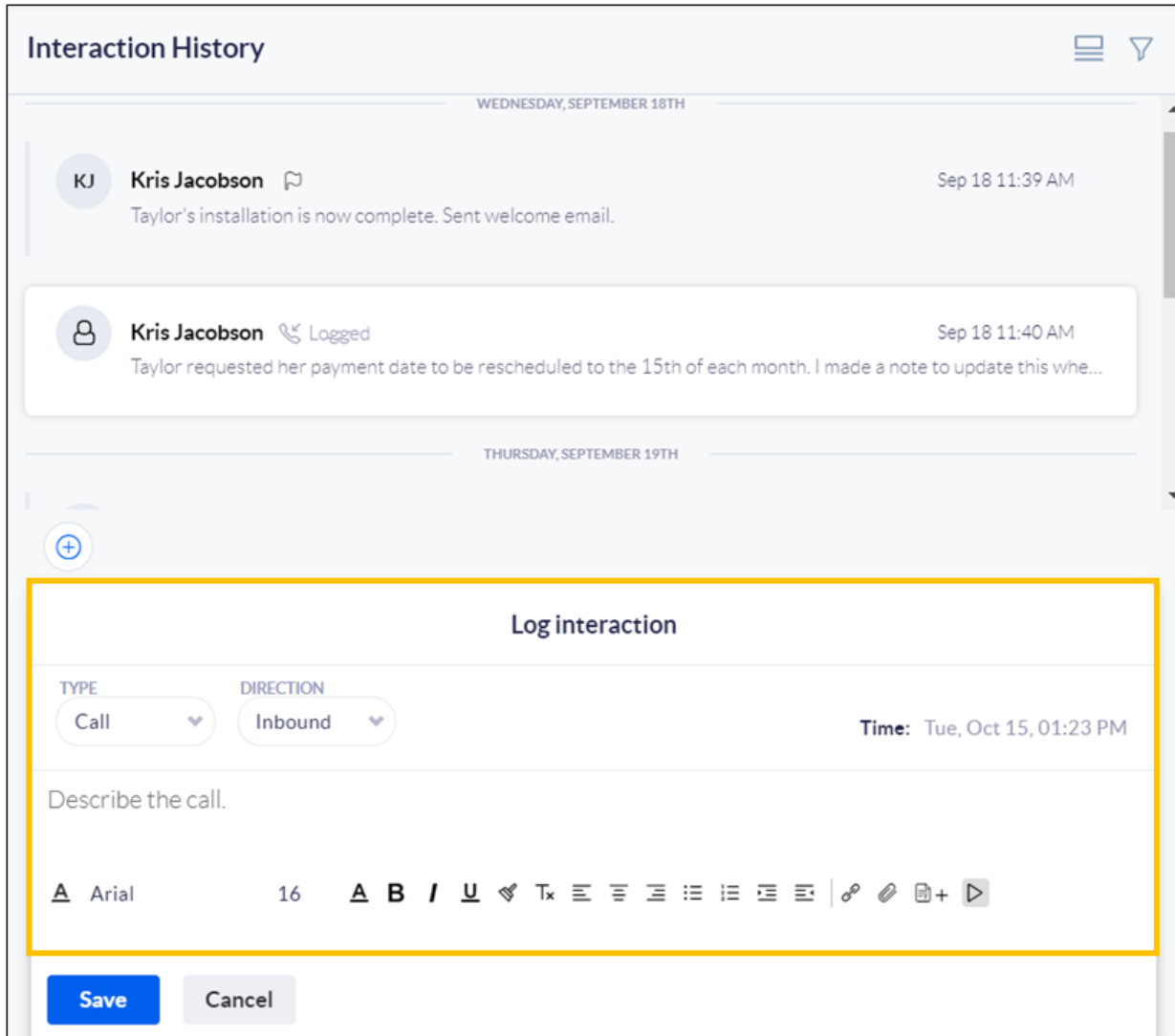
In Nextiva CRM, agents can interact via email from any Nextiva CRM Record in the related **Workspace** under the **Interaction History** panel. For example, an agent received an email from a customer about an issue for which a case is opened. Once the Case has been resolved, the Agent can reply to the customer via email informing them the issue has resolved. Users can format the text, insert links, and add [Predefined and Macros](#) when sending an email.

The screenshot displays the 'Interaction History' panel in Nextiva CRM. At the top, the title 'Interaction History' is visible on the left, and navigation icons (list and search) are on the right. Below the title bar, a date separator indicates 'WEDNESDAY, SEPTEMBER 18TH'. An incoming email from 'Kris Jacobson' (initials KJ) is shown, dated 'Sep 18 10:10 AM'. The message content reads: 'The customer would like to update the payment date to the 15th of each month.&nbsp;'. Below the message, there are icons for attachments and a plus sign. A yellow-bordered box highlights the 'Email' composition window. This window includes a header 'Email' and fields for 'From: General', 'To: Taylor Smith', and 'Subject: Request: Update Payment Due Date'. The body of the email starts with 'Hi Taylor,' followed by 'We have updated your billing date as requested.' Below the text is a rich text editor toolbar with options for font (Arial), size (16), bold (A), italic (B), underline (U), link, unlink, insert image, and a play button. At the bottom of the composition window are 'Send' and 'Cancel' buttons.

*New Email*

## Logging Interactions

In Nextiva CRM, agents can log inbound or outbound calls and emails from any Nextiva CRM Record in the related **Workspace** under the **Interaction History** panel. Users can format the text, insert links, and add [Predefined and Macros](#) when logging interactions.



The screenshot displays the 'Interaction History' interface. At the top, it shows the date 'WEDNESDAY, SEPTEMBER 18TH'. Below this, there are two interaction entries:

- Entry 1:** From 'KJ Kris Jacobson' at 'Sep 18 11:39 AM'. The text reads: 'Taylor's installation is now complete. Sent welcome email.'
- Entry 2:** From 'Kris Jacobson' (with a 'Logged' status) at 'Sep 18 11:40 AM'. The text reads: 'Taylor requested her payment date to be rescheduled to the 15th of each month. I made a note to update this whe...'

Below the entries, the date changes to 'THURSDAY, SEPTEMBER 19TH'. A '+ (plus)' icon is visible. A yellow box highlights the 'Log interaction' form, which includes:

- TYPE:** A dropdown menu currently set to 'Call'.
- DIRECTION:** A dropdown menu currently set to 'Inbound'.
- Time:** 'Tue, Oct 15, 01:23 PM'.
- Description:** A text area with the placeholder 'Describe the call.'
- Rich Text Editor:** A toolbar with options for font (Arial), size (16), bold (A), italic (B), underline (U), strikethrough (I), link (Tx), list (bulleted and numbered), indent (left and right), link (insert), unlink, and play (media).
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.

*Log Interaction*



## Macros and Predefined Text

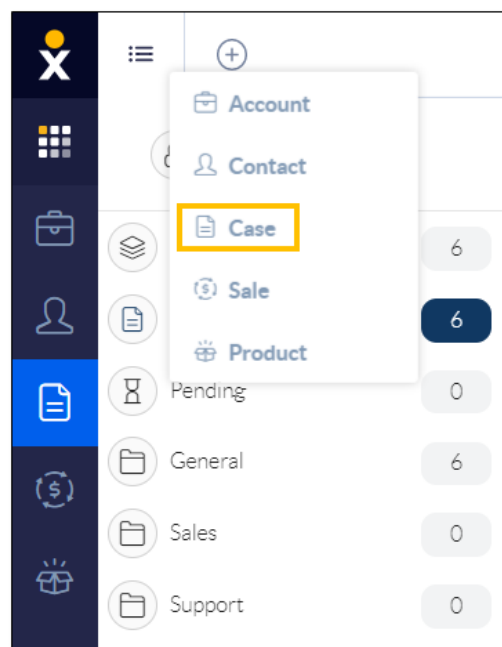
A **Macro** is a single command template used to automatically complete form fields in the Nextiva CRM. Instead of repeatedly typing or selecting the same field values while completing forms, agents can create and apply macros to automate that task. For example, customers may report the same common issue. Rather than manually completing the form for the same issue each time, agents can create a Macro. Agents can then quickly apply the macro to auto-populate the fields in the form.

**Predefined Text** is saved text that agents can insert while writing in a text editor on a form (e.g. Description, Note, Email). Predefined text is most useful when agents need to write the same message multiple times. For example, rather than creating a new welcome email for each new customer, agents can create predefined text to quickly insert and send when onboarding new customers.

### Creating Macros

Users can create Macros from the Create Case Form via a Note, Email, or Log Interaction.

1. Click the **Plus (+)** icon and select **Case**.

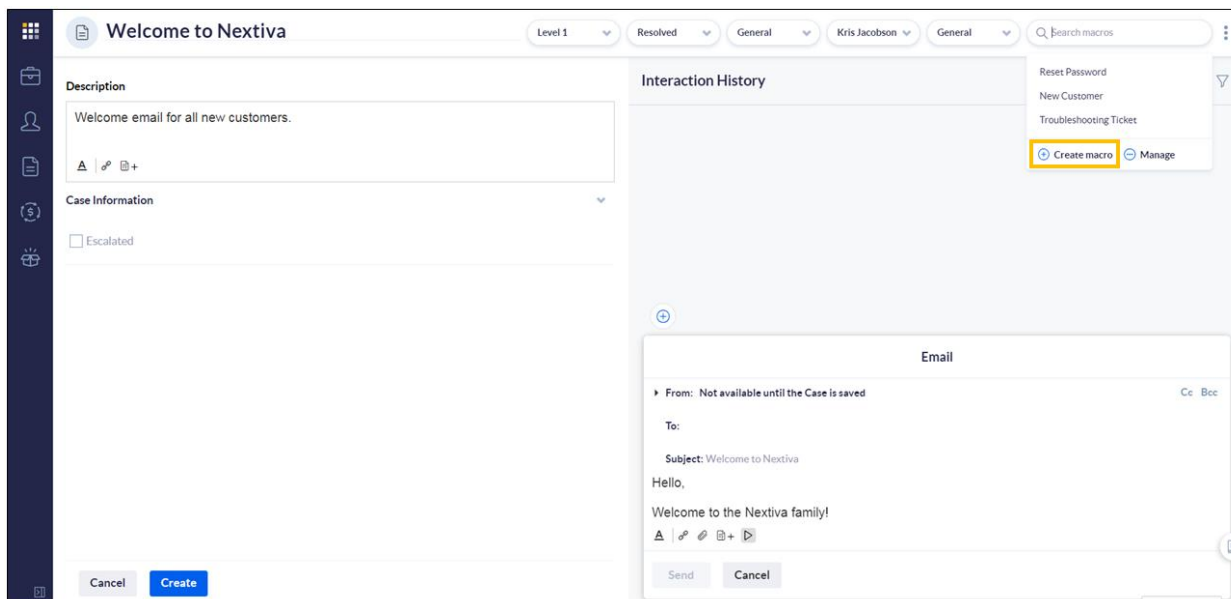


Case Option

2. At the top of the form, enter a **Case Subject** (required).
3. Choose the following parameters from the drop-down lists:
  - **Priority:** The urgency of the Case. The priority defaults to **Urgent**.
  - **Status:** The status of the Case. The status defaults to **Open**.
  - **Department:** The department to which the Case is assigned.
  - **Owner:** The user to which the Case is assigned.
  - **Topic:** The category that best summarizes the Case.
4. In the **Description** section, enter a summary of the Case. Users can format the text, insert links, and add [Predefined Text](#).

*New Case Form*

5. Create a [Note](#), [Email](#), and [Log Interactions](#) by clicking the **Plus (+)** icon on the bottom-left corner of the **Case Interaction** feed.
6. Click **Macros** in the top-right corner and select **Create Macro**.



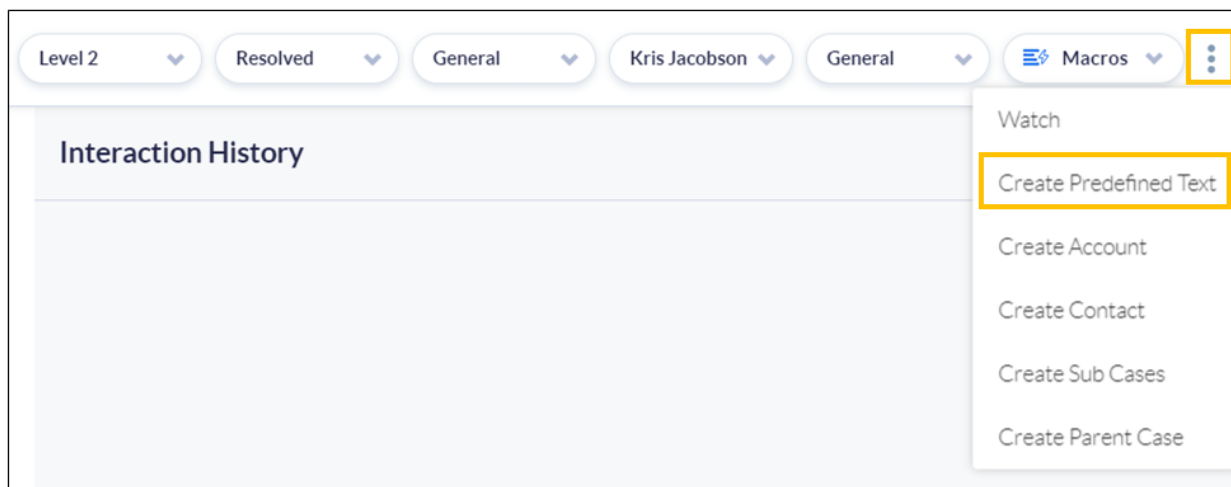
Create Macro

7. In the **Create Macro** window, enter a **Name** and **Description**.
8. Select the availability (**All Agents** or **Only Me**).  
**NOTE:** The **Available To** drop-down list is only available to Users with permissions.

## Creating Predefined Text

Users can create Predefined Text from any Nextiva CRM Record in the related **Workspace** under the **Interaction History** panel.

1. Click the **Ellipsis (...)** icon, select **Create Predefined Text** from the drop-down list.



Create Predefine Text

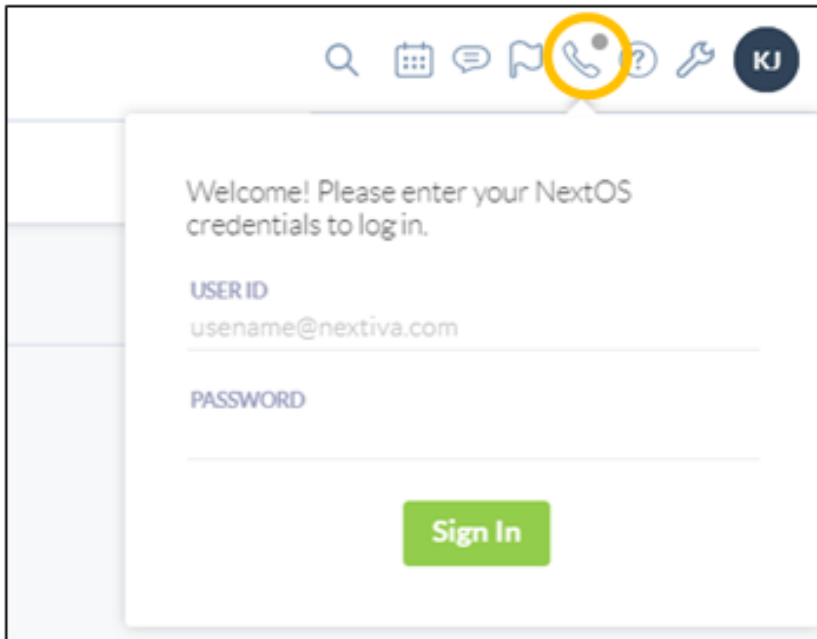
2. In the **Create Predefined Text** window, enter a **Name** and the predefined message.
3. Select the availability (**All Agents** or **Only Me**).  
**NOTE:** The **Available To** drop-down list is only available to Users with permissions.
4. Click **Create**.

## Call Pop

Call Pop notifies Users of incoming calls to their Nextiva phone number and allows them to Answer or send the call to Voicemail directly from Nextiva CRM. Users can also quickly identify and associate callers with any Nextiva CRM records, such as Accounts and Contacts.

## Signing In

1. Click the **Phone** icon at the top right corner.
2. Enter the NextOS User login credentials. Click **Sign In**.



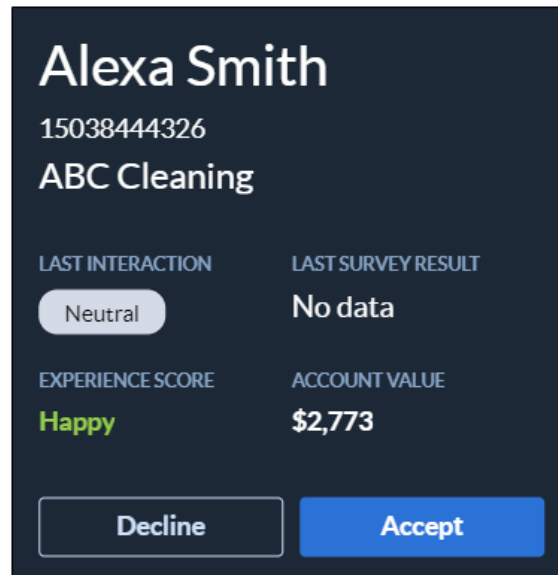
The screenshot displays a user interface for logging into the Nextiva system. At the top right, a navigation bar contains several icons: a magnifying glass, a calendar, a speech bubble, a document, a phone handset, a question mark, a wrench, and a circular profile icon labeled 'KJ'. The phone handset icon is highlighted with a yellow circle. Below the navigation bar is a white login pop-up window. The window contains the text: "Welcome! Please enter your NextOS credentials to log in." Below this text are two input fields: "USER ID" with the placeholder text "username@nextiva.com" and "PASSWORD". At the bottom of the window is a green button labeled "Sign In".

*Call Pop Log In*

## Incoming Calls

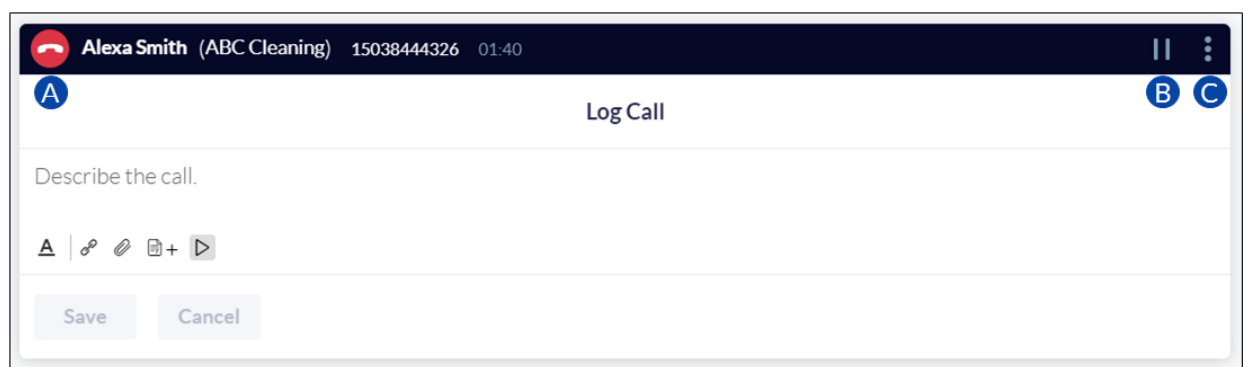
When receiving a call, a pop-up window will display in Nextiva CRM. The Call Pop will display any associated records (Account and Contact), the last interaction, last survey result, experience score, and the account value.

To answer the call, click **Accept**. Otherwise, Users can send the call to Voicemail by clicking **Decline**.



*Incoming Call*

Once accepted, Users can instantly log the call.

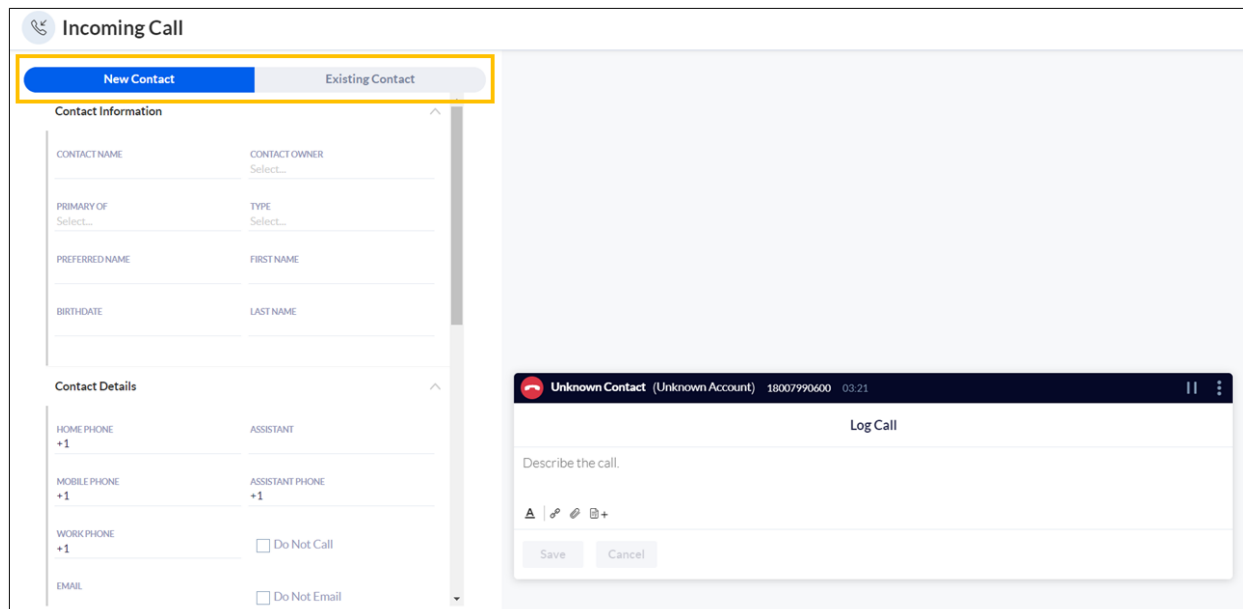


*Log Call*

- A. End call.
- B. Place call on hold. To resume, click the **Resume** button.
- C. Change the Contact associated with the call. Choose an **Existing Contact** or add **New Contact**.

## Associating Unknown Contacts

After answering a call via Call Pop, Users can associate the call with a **New Contact** or an **Existing Contact**.

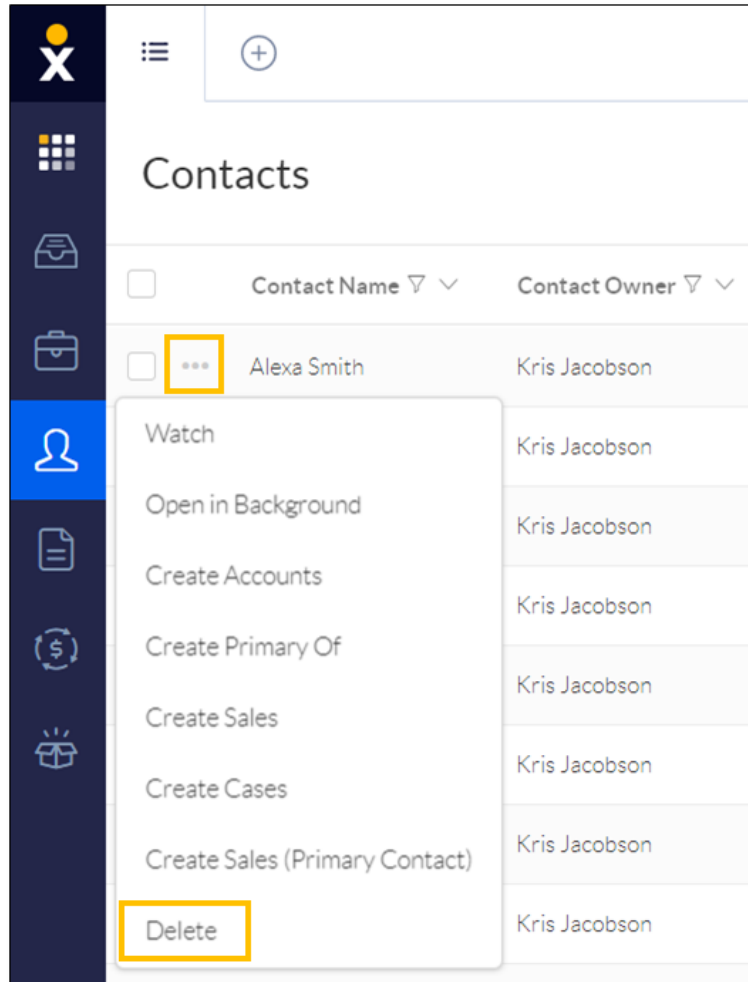


*Unassociated Call*

## Deleting Records

Deleting records (Accounts, Contacts, Cases, Leads, Opportunities, and Products) removes them from being displayed in Nextiva CRM. Only Administrators or Users with proper permissions can delete and restore records. Deleted records are stored in the recycle bin for 60 days, after which they will be automatically deleted from the system. Administrators can restore all deleted records or permanently delete records from the recycle bin. Users who have permission to delete records can only view and restore records they have deleted.

1. Click the **ellipses (...)** to the left of the desired record and select **Delete** from the drop-down list.
2. Click **Delete** to confirm.

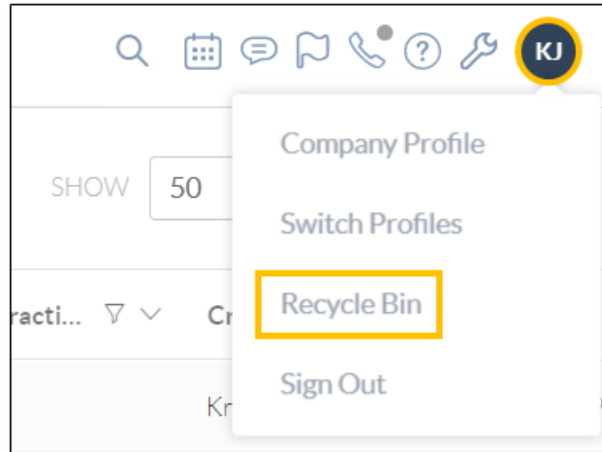


*Delete Option*

**NOTE:** To bulk delete, select the checkboxes corresponding to the desired records, and click ellipses (...) > Bulk Delete (*X records*).

## Restoring Records

1. Click the **Avatar** (or the circle with the Admin's first and last initials) at the top-right corner, then select **Recycle Bin**.



*Recycle Bin Option*

- From the **Type** drop-down list, select the desired record type to filter the records.

## Recycle Bin

Items in the recycle bin are retained for 60 days and then permanently deleted.

TYPE

Sale ▾

- Sale
- Contact
- Case
- Product
- Account

CURRENTLY SHOWING 1-1 OF 1 RESULTS

Deleted by ▾ ▾	Contact Name ▾ ▾	Sale Owner ▾ ▾
Kris Jacobson	<a href="#">Taylor Smith</a>	Kris Jacobson

*Recycle Bin Record Type*

- Click the **ellipses (...)** corresponding to the desired record, then select **Restore** from the drop-down list.



## Recycle Bin

Items in the recycle bin are retained for 60 days and then permanently deleted.

TYPE  CURRENTLY SHOWING 1-4 OF 4 RESULTS

<input type="checkbox"/>	Date deleted ▾ ▾	Deleted by ▾ ▾	Contact Name ▾ ▾	Contact Owner ▾ ▾
<input type="checkbox"/> <b>...</b>	2019-10-09 03:02 PM	Kris Jacobson	Alexa Smith	Kris Jacobson
<input type="checkbox"/>	:15 AM	Kris Jacobson	Larry Nelson	Kris Jacobson
<input type="checkbox"/>	:28 PM	Kris Jacobson	Sam Trinder	Kris Jacobson

Restore  
Delete Permanently

*Restore Option*

**NOTE:** To bulk restore, select the checkboxes corresponding to the desired records, and click **ellipses (...)** > **Restore**.

## Permanently Deleting Records

1. Click the **Avatar** (or the circle with the Admin's first and last initials) at the top-right corner, then select **Recycle Bin**.

**NOTE:** Only Nextiva CRM Administrators can permanently delete records from the recycle bin.

2. From the **Type** drop-down list, select the desired record type to filter the records.
3. Click the **ellipses (...)** corresponding to the desired record, then select **Delete Permanently** from the drop-down list.

## Recycle Bin

Items in the recycle bin are retained for 60 days and then permanently deleted.

TYPE  CURRENTLY SHOWING 1-4 OF 4 RESULTS

<input type="checkbox"/>	Date deleted ▾ ▾	Deleted by ▾ ▾	Contact Name ▾ ▾	Contact Owner ▾ ▾
<input type="checkbox"/> <span>⋮</span>	2019-10-09 03:02 PM	Kris Jacobson	Alexa Smith	Kris Jacobson
<input type="checkbox"/>	:15 AM	Kris Jacobson	Larry Nelson	Kris Jacobson
<input type="checkbox"/>	:28 PM	Kris Jacobson	Sam Trinder	Kris Jacobson

Restore  
Delete Permanently

*Delete Permanently Option*

**NOTE:** To permanently bulk delete records, select the checkboxes corresponding to the desired records, and click **ellipses (...)** > **Delete Permanently** > **Yes**.

For additional assistance, please contact a member of our Amazing Service team by emailing [support@nextiva.com](mailto:support@nextiva.com) to immediately open a case.