Nextiva voice – basic settings

Admin guide
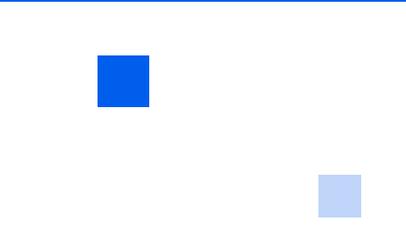
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Getting started

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

Logging in

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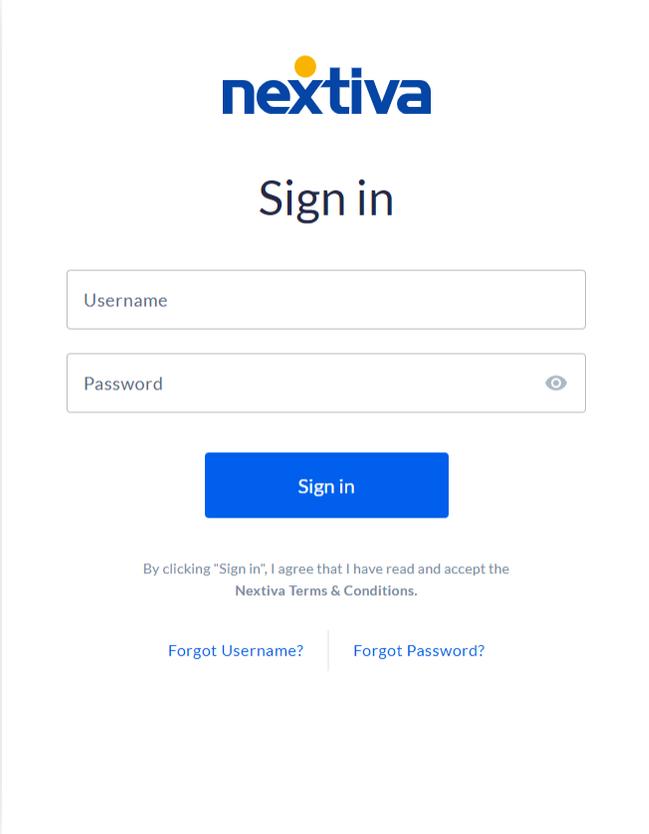
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Sign in

Username

Password 👁

Sign in

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

Forgot Username?   Forgot Password?

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Users

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

Creating new users

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

Roles (optional)

Roles limit user access to specified areas of NextOS.

Primary team

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

Licenses

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

Create users   ✕

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

FIRST NAME

LAST NAME

EMAIL (USER ID) ❓

ROLE ❓

PRIMARY TEAM ❓

LOCATION (optional)

TIME ZONE (optional)

Licenses

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

⊕ Add license

Editing users

Edit user details, including resetting passwords.

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

Deactivating users

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

Reactivating users

Click the **Gear** > X to show inactive users. Select the checkbox next to the user > **Reactivate**.

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Voice settings

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

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

Phone

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

Phone number

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

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

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

Voicemail

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

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

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Business Hours   ✕

NAME

Hannah Brown's Schedule

Regular hours

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

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

☐ Always open (24 hours, 7 days)

Holidays

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

All Federal U.S. Holid…   ▾

[Cancel] [**Save**]

Emergency location

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

Business hours

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

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

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Call flows

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

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

Creating a new call flow

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

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

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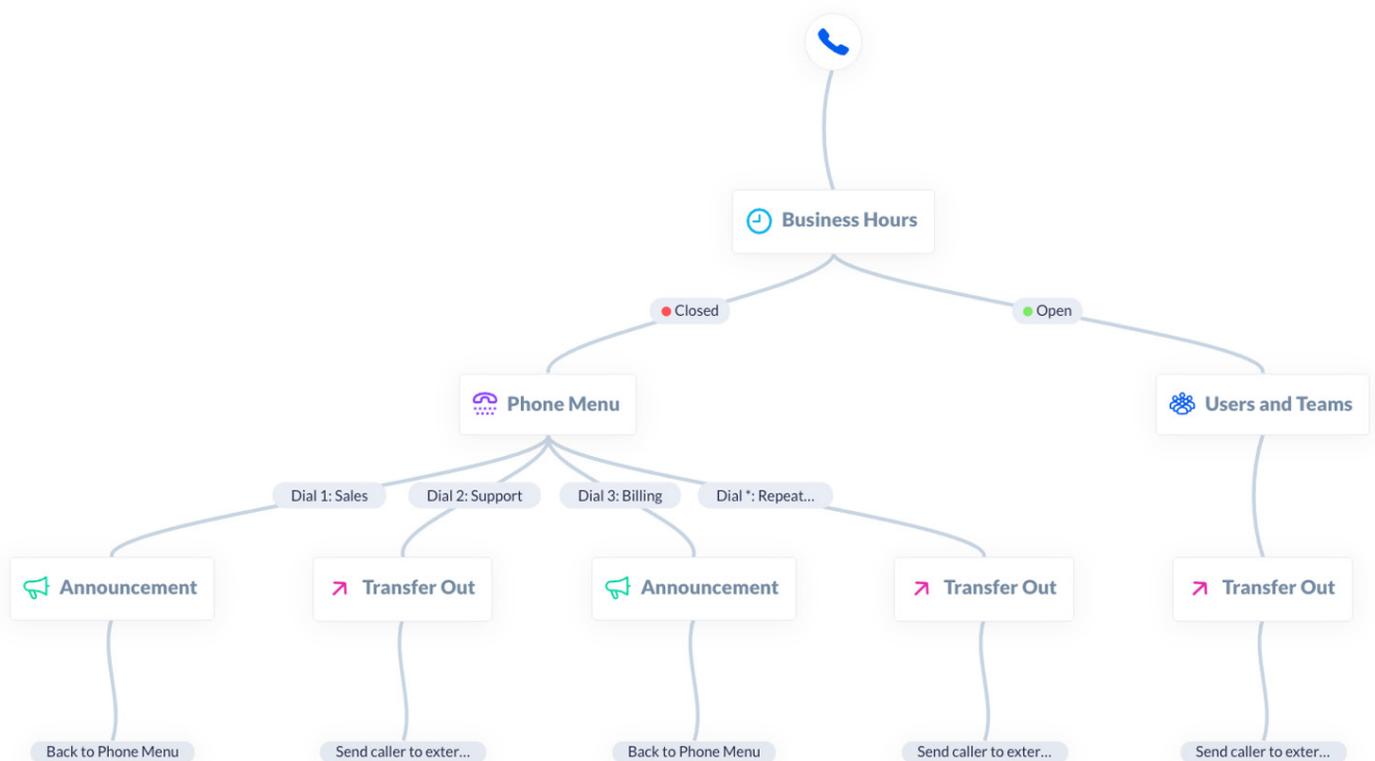
Announcement

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

Phone menu

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

Transfer out

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

Call flow

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

Users and teams

Route calls directly to the appropriate user or team.

Voicemail

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

Dial by extension

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

Dial by name

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

Repeat this process until all call flow branches reach an ending point such as a voicemail box or transfer out.

Click Go Live to activate the call flow.
phone, choose phone > enter MAC address > **Save**.

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