Self-configuration Quick Reference Guide

NextOS Platform < Nextiva NP3

nextiva

Table of contents

Platform voice capabilities

Capability	Capability NextOS platform location (For all accounts created after the release of NextOS voice admin)	NP3 location (For all accounts created prior to the release of NextOS voice admin)
User-level settings (Admin role) Phone Number Device Emergency Location Voicemail Monitoring Busy Lamp Field Shared Call Appearance Call Forward Always Call Forward Unanswered Call Forward Unreachable Call Forward Busy Call Forward Selective Simultaneous Ring Sequential Ring Do Not Disturb Selective Call Rejection Call Waiting Identification Restriction Location Forwarding Voicemail (advanced) Push to Talk Conferencing Call Recording Nextiva Anywhere Remote Office Speed Dial Emergency Location Voicemail Monitoring Busy Lamp Field Shared Call Appearance Call Forward Always Call Forward Unanswered Call Forward Unreachable Call Forward Busy Call Forward Selective Simultaneous Ring Sequential Ring	Users > Voice Settings Improvements: Simplified settings and instructions	Manage Users

Do Not Disturb Selective Call Rejection Call Waiting Identification Restriction Location Forwarding Voicemail (advanced) Push to Talk Conferencing Call Recording Nextiva Anywhere Remote Office Speed Dial		
User-level settings (User role) – Self-configure User Dashboard / Profile v1 Call Forward Always E911 address Security pin Voicemail	My Profile My Voice Users should be directed to the mobile or desktop app for most settings.	My Account > Profile
User business hours	Users > Voice Settings > Business Hours · Manage schedules from within the user settings. · Create one schedule with regular & holiday hours. · Add all U.S. federal holidays with one click. · Easily add breaks.	My Account > Schedules > Manage User Schedules
Single user creation	Users > Create User > Voice Setup *Also accessible via Admin Dashboard. *Has Pendo guide.	Add Users
Bulk user creation	Admin Dashboard > Data Import > Spreadsheet > Users Admin Menu > Data migration & Integrations > Spreadsheet > Users Improvements: · Improved error handling. · 40 user limit removed.	Add Users

Voice setup wizard	Users > Voice setup *Also accessible via Admin Dashboard. *Has Pendo guide.	My Account > Setup wizard
Delete user	Users (This is known as Deactivate in the platform.) Check the box next to the users you want and Deactivate at the top of the table will appear. This will deactivate the user in the platform, which will delete the user in Broadworks.	Manage Users
Manage admin users (Admin permissions)	Users > User Profile > Role · Admin role will allow access to all voice configurations and locations. · Customer can also create a custom role. (See this support article.) · Admin (for voice only) does not have to be a licensed user. · Admins can configure their own settings via the user page or via the mobile or desktop app. Improvements: Improved ability to manage voice from the same login.	Users > Manage Administrators
Single location creation	Locations > Create Location.	Add Locations
Location settings Audio Files Extension Dialing Music on Hold Location Forwarding Conferencing Nextiva Anywhere Group Paging Voice Portal	Locations > Voice Settings Improvements: Simplified settings and instructions.	Manage Locations

Location business hours	Locations > Voice Settings > Business Hours · Manage schedules from within the location. · Create one schedule with regular and holiday hours. · Add all U.S. federal holidays with one click. · Easily add breaks.	My Account > Schedules > Manage Enterprise and Location Schedules
Phone numbers	Communication > Voice > Numbers *Also accessible via Admin Dashboard. *Has Pendo guide.	My Account > Numbers
Phone number transfer (Porting)	Communication > Voice > Transfer There will be multiple iterations of the porting process to focus on improving customer engagement/communication and operational processes.	My Account > Porting Status
Phones and devices	Communication > Voice > Phones & Devices *Also accessible via Admin Dashboard. *Has Pendo guide.	Devices
Bulk device creation	Admin Dashboard > Data Import > Spreadsheet > Devices Admin Menu > Data migration & Integrations > Spreadsheet > Devices Improvements: · Improved error handling. · 40 user limit removed.	Devices

Call flow builder	Communication > Voice > Call Flows *Also accessible via Admin Dashboard. *Has Pendo guide. • Ability to add all components (schedule, auto attendant, and call groups) within the call flow builder, saving time and clicks. • Enhanced user experience makes these steps clear and easy to follow. • Ability to edit an existing call flow. • Ability to record greetings within call flow (auto attendant, voicemail boxes).	Advanced Routing > Call Flows
Call groups	Users can be added in Teams. Teams can be added via Call Flows. Record greetings within Call Flows and manage via the Teams page.	Advanced Routing > Call Groups
Auto attendant	Phone Menu Configured in Call Flows.	Advanced Routing > Auto Attendants
Licensing User licensing Bulk license editing	Licensing Licensing > Edit Assignment •Clearly see who is assigned to each license. • Bulk assign and un-assign add-on licenses.	My Account > Licenses
Voice Analytics access	Communication > Voice *Account must have an Analytics License, and the user must have permissions.	Analytics

Business hours account	Communication > Voice > Call Flows Enterprise "business hours" management will be added in a future iteration.	My Account > Schedules > Manage Enterprise and Location Schedules
Call history	Communication > Voice > Call Activity Improvements: · Improved ability for call history to match billing.	My Account > Call History
System status	Link to status page available from ❓ on header.	Systems status banner
Billing – Payment options	Billing	My Account > Billing
Voice dashboard	Communication > Voice *Also accessible via Admin Dashboard. Improvements: · Central hub for all voice-related items. · Enhanced graph for viewing call data.	Dashboard

Dashboard updates and Pendo

Name	Overview
Admin dashboard	Updated look and feel with quick links to platform features, such as user and teams. Hierarchical admin links structure that guide the user to the appropriate action. A section highlighting the capabilities of the platform as a whole.
User dashboard	Updated look and feel with links to the main product areas. Area to manage user profile-level data, including the ability the change a user's email. Sections for managing highest priority voice capabilities.
Pendo	Initial in-app welcome video. Embedded guides and walkthroughs in key areas. Tool tips.

Integrations

Name	Overview
Admin dashboard	**Federated SSO (apps)** Background: Some customers want to use their own identity providers for credentials to be used across all applications in their environment. The use case is this: Customers who have a third-party Identity Provider (IdP), such as AD, Okta, Ping, OneLogin, etc. as their identity provider (that owns and manages each user's single set of credentials, login ID + password, to be used to access all supported applications they use) expect to be able to use those credentials to access the Nextiva desktop and mobile apps. Nextiva's platform/NextOS customers are asked to enter their domain name when they sign up for the service. They do this during the "Accept Sales Quote" part of the process. The expectation for SSO customers is that they will contact support to get the right version of the app to use for SSO. Support will explain how to set it up so that it's associated correctly for SSO. The expectation for non-SSO customers is that nothing changes. When we release 22.7, they will be notified that an upgrade is available and all they need to enter after downloading the new version is their Broadworks credentials. Platform, mobile app, and desktop app all use the same login.
Inference / IVR	No change to existing process.
Advanced call queueing	No change to existing process.
Call recording (Orex)	No change to existing process.
Unity Contact Center	No change to existing process.
CJP	No change to existing process.
Go Integrator	No change to existing process.
Call2Teams	No change to existing process.

Sales, support, and partner tooling

Feature	Existing process (NP3)	New process (NextOS Platform)
Access to Broadworks credentials	NP3 >User > reset password	Voice settings > Advanced Integrations will allow an admin to send reset credentials to the user's email address. **Custom integration credentials** Nextiva customers are able to use their Nextiva phone service within other applications via integrations. (e.g., Call2Teams, Unity Contact Center, etc.). Those integrations require a user to have their Broadworks (BW) credentials. With the transition to platform voice, users will no longer have access directly to their BW credentials, as they will use their platform credentials to log into NextOS, and the mobile app and desktop apps. How would I get BW credentials, if a customer is platform voice? **For the customer**: In administration tools or from the landing page: 1.Go to Users. 2.Select the user that needs BW credentials. 3.Actions > Voice Settings a. Note: A user must already be set up on voice to receive BW credentials. 4.Select Custom Integrations under Advanced Settings. 5.Click Email login credentials. An email will be sent directly to the user with their username as well as a link to reset their password. Once the password is reset, the user can use the credentials to log in to the integration.

Feature	Existing process (NP3)	New process (NextOS Platform)
Partner manage multiple accounts	Manage with multiple credentials	Manage with multiple credentials **What's a profile?** · A profile connects your username to any accounts that you have access to that use that same username. **How do I get more than one profile?** · Create a user in a new account. · Enter your username (example: john@nextiva.com) in the email address field. · The profile of this new user will automatically show up on the profile page. **How do I access the profile page?** · Login to auth.nextos.com using your username (an email address) and password. · Forgot your username or password? Just click on the link, and enter your email. **What does the profile page show me?** · Name of company · Domain · Account number **How do I add a new profile?** · Profiles are added based on the email address entered when a user is created. **Will the profile page show me if I have two users on the same account?** · No, because two users on the same account cannot have the same email address. You will only see one user per account . **Can I switch which account I am looking at without logging out?** ·Yes. Click Switch Profiles from the top right menu. Improved ability to manage via profile selection.

Glossary

NP3 term	NextOS platform term
Auto Attendant	Phone Menu
Call Groups	Teams
Schedules	Business Hours