

# RTS & Nextiva Quick Start Guide

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## RTS & Nextiva Getting Started Guide Overview

This guide will outline how to get started with Nextiva and list some basic functions that can be accomplished via the handset and software clients.

### What is Nextiva?

Nextiva is a cloud-based voice over IP (VoIP) solution. The total infrastructure to control calling and call routing exists in Nextiva's cloud. RTS has simply configured hardware telephone handsets (Polycom devices) to point to this service and allow some users to login to a software interface provided by Nextiva. These services are dependent on having an active internet connection to reach Nextiva. The software interface can be accessed anywhere in the world when connected to the internet.

### Handset vs. Softphone

Nextiva offers opportunity to use a handset at the desk (Polycom) or a softphone client. A softphone is a telephone that operates via a computer operating system via a special app in tandem with microphone and speakers.

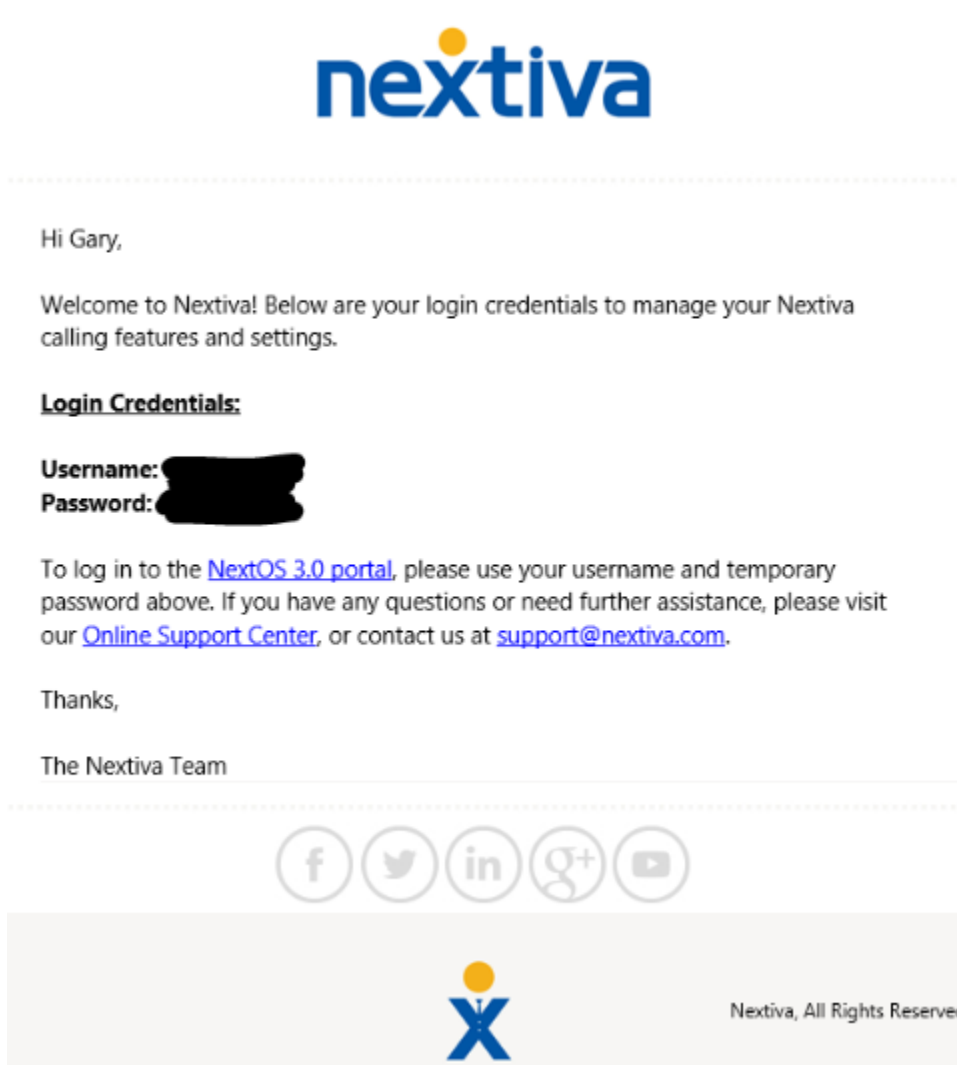
The handset will be pre-configured and ready to use at your desk once you are converted to Nextiva. IT or a campus representative will make this conversion for you at a specified time. If you are to have access to the softphone, you will download and install an application for your specific operating system. This is available on Windows, macOS, Android, and iOS.

The softphone allows you to take and make calls with your Nextiva account through a computer's microphone and speakers, attached headset, or through your smart phone. So you could theoretically login anywhere around the world and receive or place calls on behalf of RTS if you have access to the softphone app. Not all users have been selected for licensing with the softphone client, but roughly 60% of RTS phones are enabled to use it. If you do not have the softphone client and feel you would benefit for having it, please reach out to your business manager to coordinate potential acquisition of advanced licensing.

## Starting Out

### Nextiva Username and Password Email

You should have received an email from Nextiva on July 24, 2019. Mike Copening asked you to save this. It would look like the following:



This email contains your Nextiva username and a temporary password. You will use this to first login to the Nextiva NextOS 3.0 online portal. Upon login, you will be asked to change your password and possibly setup a PIN. We will cover the Nextiva Portal in more details later, but you will want to login here first so that if you will use the softphone client you can login to it once installed with this username and your new password.

### NextOS Portal Link

The link to login to Nextiva's online portal is in the body of the welcome email. A general login link you can bookmark long term is here:

<https://authenticate.nextiva.com/AccountValidation/login.action>

If you are presented a screen with several options, pick to enter the Voice & Analytics section.

# Welcome to NextOS!



**Voice & Analytics** Unified communications for every business

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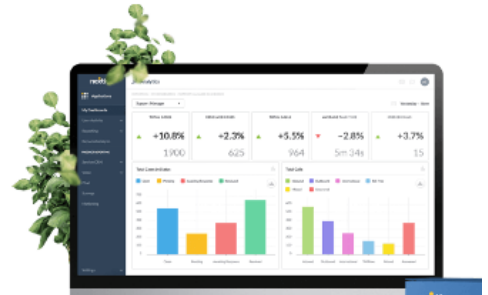
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## Setting Up Handset Passcode, Your Name, and Voicemail Recordings

When your handset has been converted to Nextiva, you will be able to dial into administrative menus to accomplish several tasks. You can also access the menus from remote phones. If you access the menu from a Polycom desk handset, you will start at the full menu. If you access from a remote phone, you will start in the voicemail menu.

Upon first login, you will be asked to record your name and set a passcode. This is an important step. You will also want to record your no answer message the first time you login. The no-answer message is located under the voicemail menu options, see below for navigating to it.

There are three ways to access the phone admin / voicemail menus depending on where you are calling from:

### Accessing The Voicemail Menus From Your Desk Handset (Polycom)

- Pick up the phone or put it on speaker phone.
- Dial 9999. Listen to the instructions.
- Supply your passcode. The default passcode 0000.
- If it is your first time logging in, you will be prompted to change the passcode and record your name. Follow the instructions. When making a new passcode, **do not** do the following:
  - Use the same passcode as your extension.
  - Use four sequential numbers (1234)
  - Use the same number four times (1111)

### Accessing The Voicemail Menus From Another Desk Handset, Not Your Own Dedicated Handset (Polycom)

- Pick up the phone or put it on speaker phone.
- Dial 9999. Listen to the instructions
- Press \*.
- Supply your extension.
- Supply your passcode. The default passcode 0000.
- If it is your first time logging in, you will be prompted to change the passcode and record your name. Follow the instructions. When making a new passcode, **do not** do the following:
  - Use the same passcode as your extension.
  - Use four sequential numbers (1234)
  - Use the same number four times (1111)

## Accessing The Voicemail Menus From Remote Location / Outside Phone

- Two options to get into the system:
  - Dial your direct number.
  - Dial a backdoor number and supply your extension.
    - Use a temporary backdoor number: 601-326-2544.  
Final backdoor numbers will be listed once the port is complete.
- Once your voicemail greeting plays, hit \*. Listen to the instructions
- Supply your passcode. The default passcode 0000.
- If it is your first time logging in, you will be prompted to change the passcode and record your name. Follow the instructions. When making a new passcode, **do not** do the following:
  - Use the same passcode as your extension.
  - Use four sequential numbers (1234)
  - Use the same number four times (1111)

## The Voicemail and Account Menus

Once your account is setup, you will be able to navigate through the voicemail menus. Listen to the instructions provided. You will want to record your no answer greeting. This is the greeting played when you do not answer your phone and the caller goes to voicemail.

Depending on how you called into the system above, the below lists the different landing menu hierarchies. Please note that the voicemail menu is actually a sub-menu off the main admin menu.

### *Main Admin Menu Hierarchy:*

Reference this menu if you are logging in from an RTS Polycom handset:

- 1 – Voicemail access
  - 1 – Listen to messages
  - 2 – Change busy greeting
  - 3 – Change no answer greeting
  - 4 – Change extended away greeting
  - 5 – Compose and send a new message
  - 7 – Delete all messages
  - 8 – Modify message deposit settings
  - \* - Main menu
- 3 – Greetings menu
  - 1 – Record name
  - 2 – Change conference greetings
  - \* - Main Menu
- 5 – New announcement
  - 1 – Record audio announcement
  - \* - Previous menu
- 8 – Change passcode
- 9 – Exit voice portal
- # - Repeat

### *Voicemail Menu Options:*

Reference this menu if you are accessing from a remote phone:

- 1 – Listen to messages – plays messages, after message these options appear:
  - 2 – Repeat message
  - 5 – play message envelope
  - 7 – Erase message
  - 8 – Call back caller
  - 9 – Additional options
    - 1 – reply to message
    - 2 – forward message
    - \* - previous menu
    - # - repeat menu
  - # – Save message
  - \* - Back to menu
- 2 – Change busy greeting
  - 1 – record new busy greeting
  - 2 – review busy greeting
  - 3 – revert to default busy greeting
  - \* - previous menu
  - # - repeat
- 3 – Change no answer greeting
  - 1 - record new no-answer greeting
  - 2 – review no-answer greeting
  - 3 – revert to default no-answer greeting
  - \* - previous menu
  - # - repeat
- 4 – Change extended away greeting
  - 3 - record new extended away greeting
  - \* - previous menu
  - # - repeat
- 5 – Compose and send a new message
  - This really shouldn't be used
- 7 – Delete all messages
- 8 – Modify message deposit settings
  - This really should be used right now
- \* - Main menu
  - See the above section on navigating the main menu

## The Nextiva App

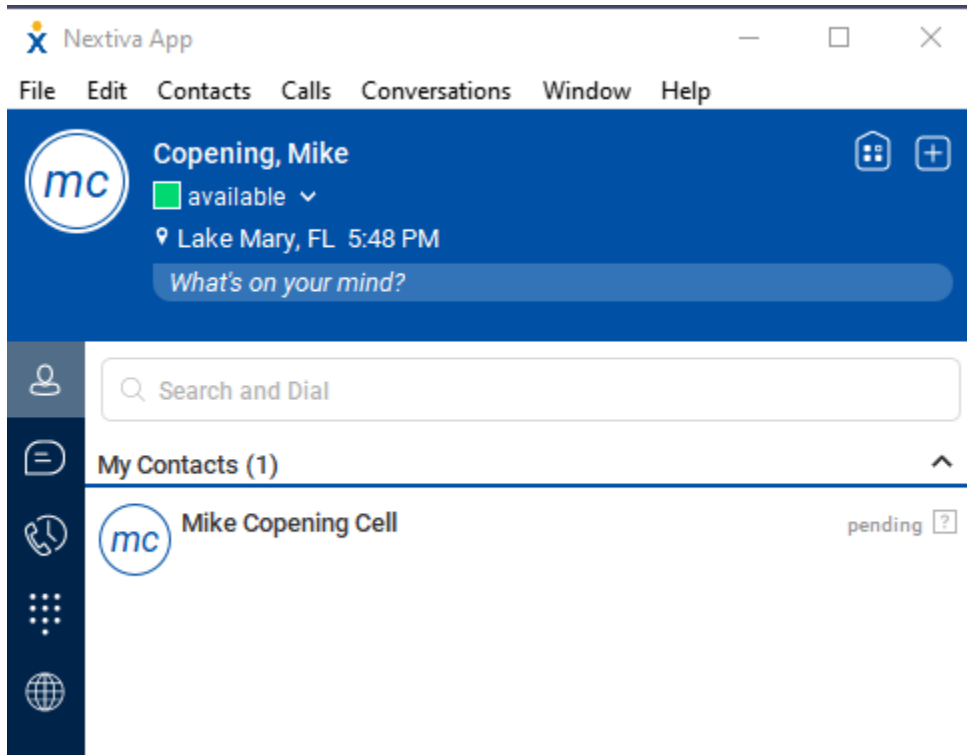
If you have been granted access, you can download and login to the Nextiva App. The Nextiva App can be installed on Windows, macOS, iOS, and Android devices. You can download and login to the app simultaneous on a computer and smart phone. This app will extend your communications and collaboration toolset with Nextiva. The first thing is to find the appropriate download link:

### Download Links






- Windows: <https://www.nextiva.com/support/articles/nextiva-app-windows-setup.html>
- Apple macOS: <https://www.nextiva.com/support/articles/nextiva-app-mac-setup.html>
- Apple iOS: <https://apps.apple.com/us/app/nextiva-app/id738802901>
- Android: <https://play.google.com/store/apps/details?id=com.nextiva.nextivaapp.android&hl=en>

## Things To Know Upon Login to the Desktop (Windows, macOS) App

### Navigating The App

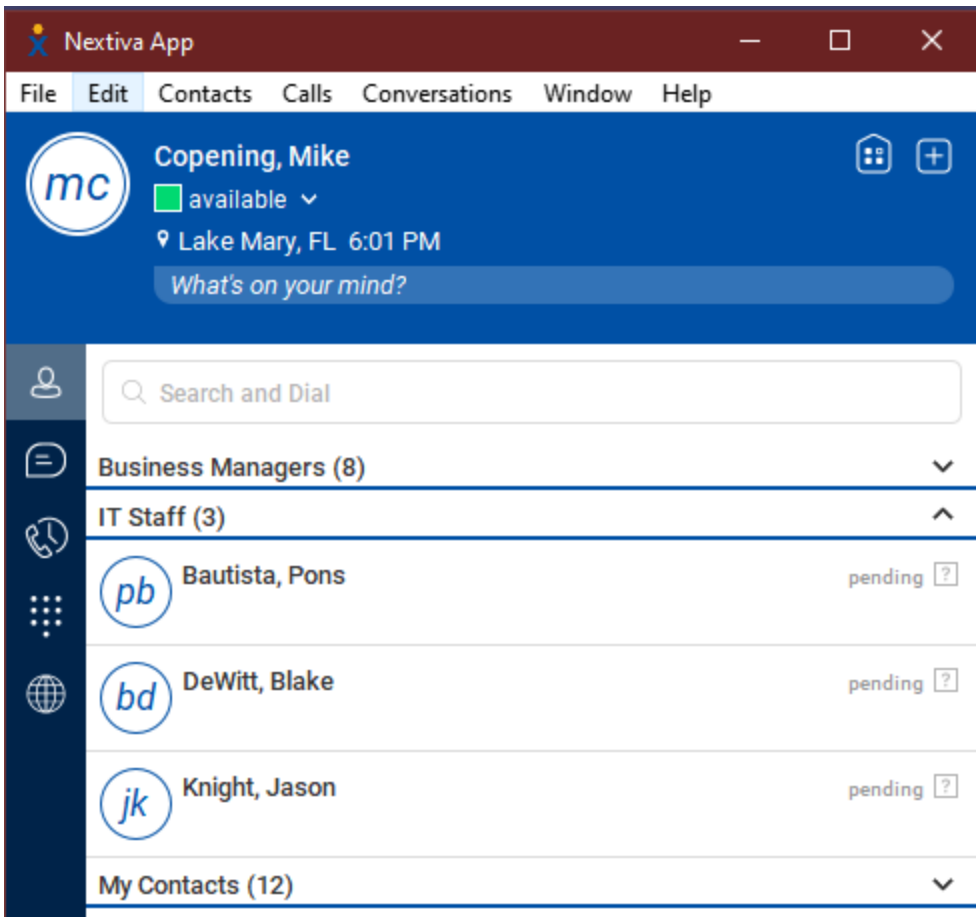


The app has a few primary navigation options. There is a traditional file menu at the top. And the main sections of the app are also accessed via icon buttons on the left edge. The icons are as follows:

-  Contacts → This is where you can create your own custom contacts, favorites, and lists.
-  Chats → This will display any internal instant messages sent to others on staff or SMS messages sent to contact cell phones.
-  Call History → This displays two main areas, call history and voicemail.
-  Dial Pad → This is where you can dial phone numbers, extensions, etc. You can paste phone numbers you've copied here instead of typing digits.
-  Company Directory → This is where you can review the entire company directory and call, chat, meet, or otherwise with fellow staff.

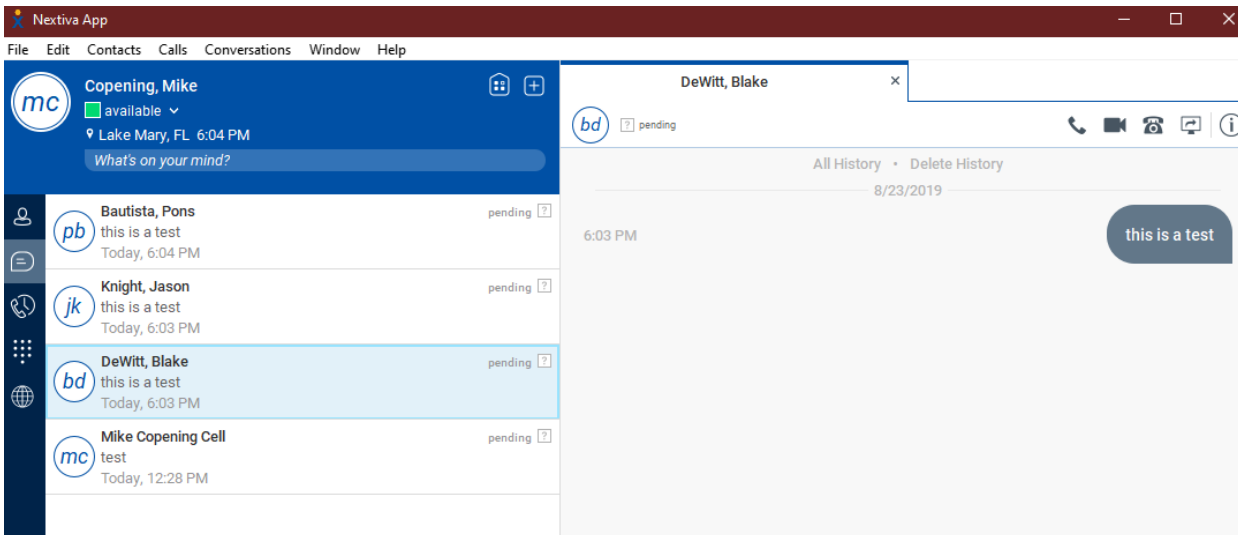
### Contacts Screen

The contacts screen will appear mostly blank. If you have integrated its access to see your Outlook contacts, you can search and results will include them. You can also create your own custom groups and then add staff to those groups. This will allow you to organize your contacts as to reach out to your most commonly contacted people inside and outside the organization.



### Chat Screen

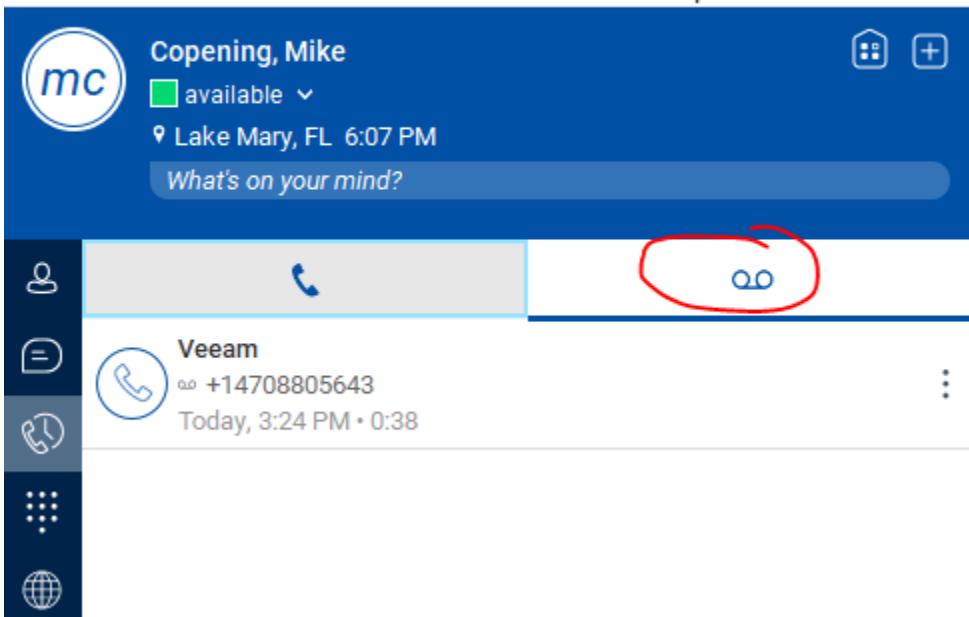
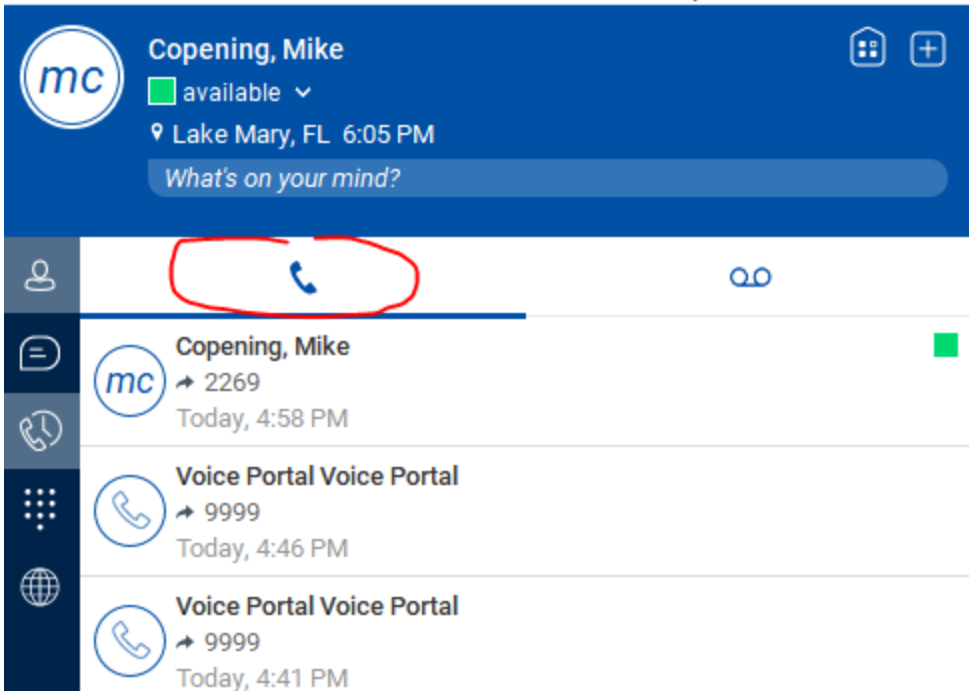
The chat screen simply shows all your recent chats. Chats delete after 7 days. You can then double click to open each chat and have multiple open at a time.



### Call History / Voicemail Screen

This screen has two tabs at the top. The phone icon shows your recent inbound and outbound calling history. The tape loop icon shows your voicemail. You can click on a voicemail which will then let you play it.

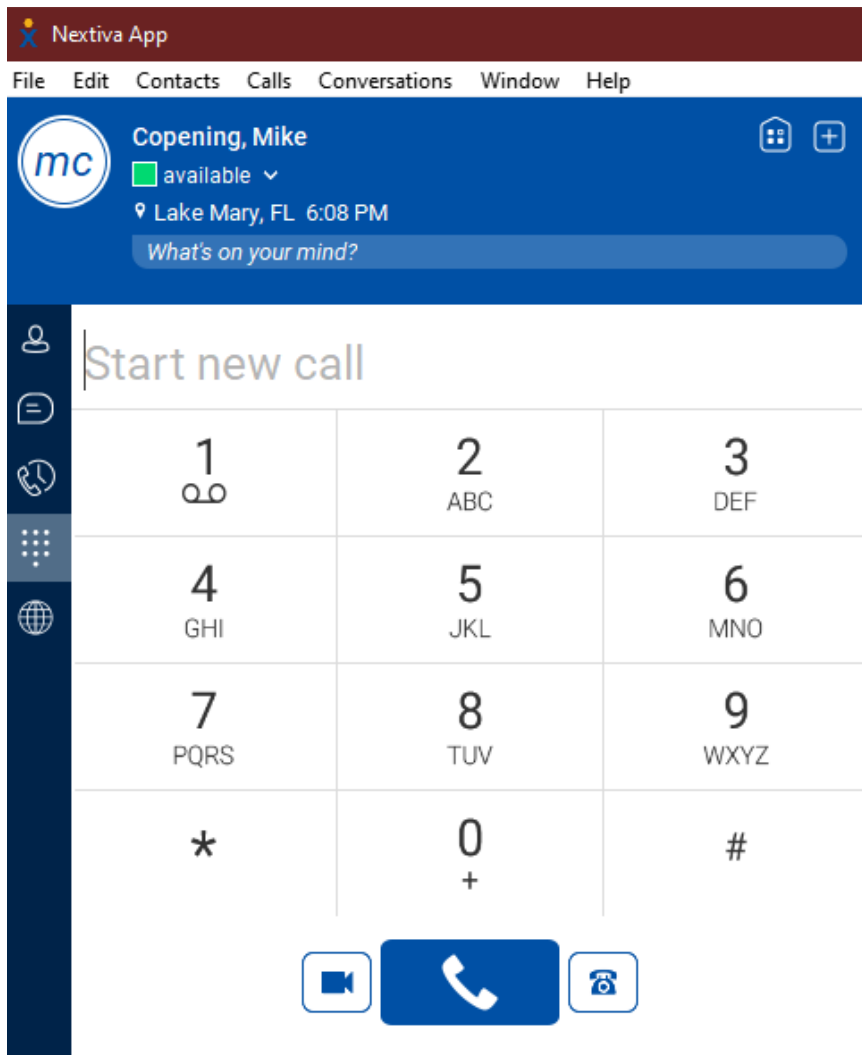







Concerning voicemail, you may have received voicemail to email if that was enabled. If you delete voicemail in your email, it will still appear within the app. Likewise, deleting the voicemail in the app does not delete the email. So if you take great care in keeping things clean, you may need to delete voicemail here that you've already listened to via email. If you do not ever delete voicemail in the app, the oldest ones will eventually get automatically deleted when you reach a threshold for allowed saved messages.

## Dial Pad Screen

The dial pad screen allows you to push numbers to prepare to dial, type numbers from your keyboard, or paste numbers. There are then three buttons at the bottom of the dial pad which tells the software **\*how\*** to dial the call. This is important, as which button you click will cause the phone call to initiate in different ways and places.

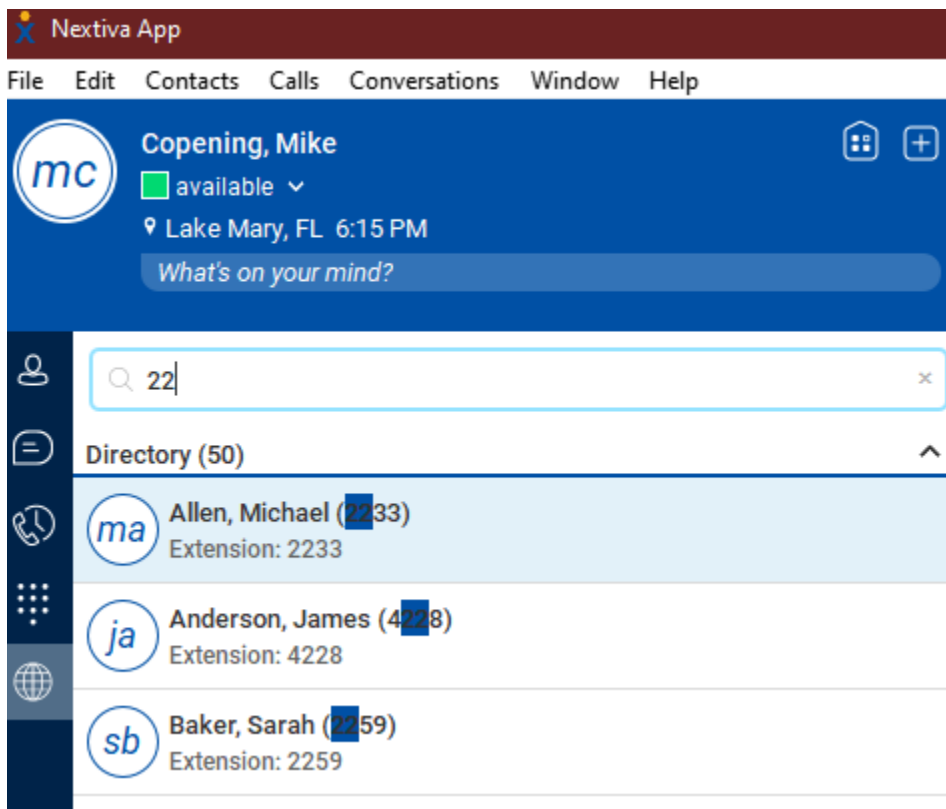
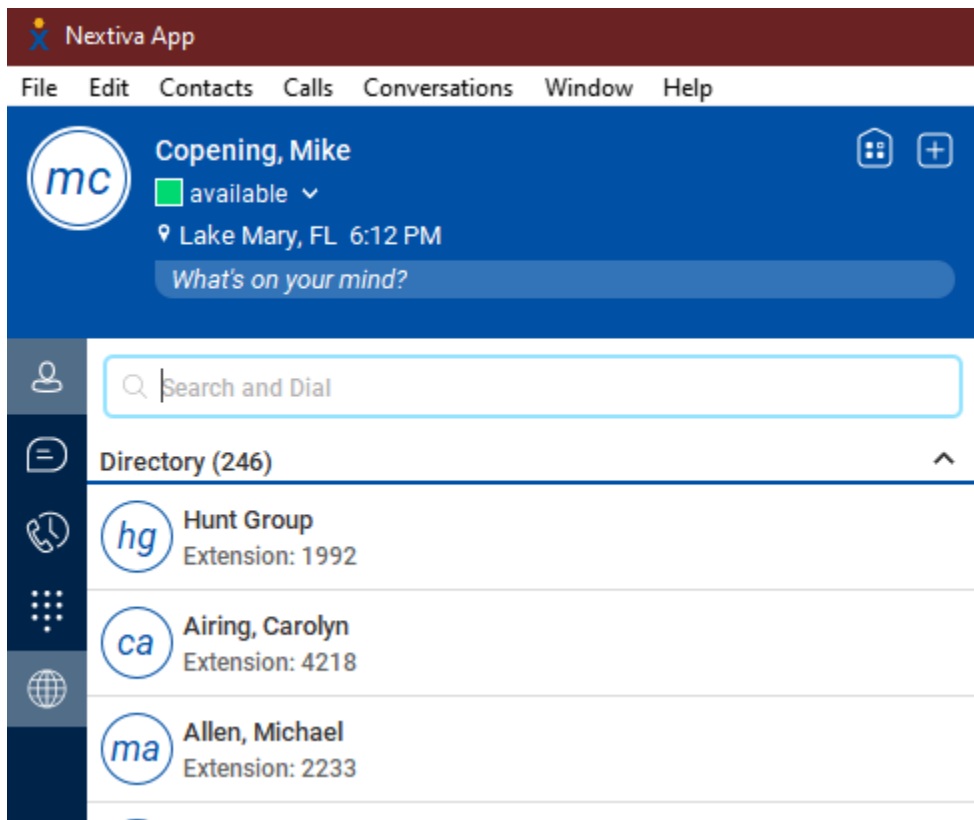


-  → Video call button. Tries to start a video call. Only works with others on Nextiva with a web camera.
-  → Softphone call. This initiates and connects the phone call via the softphone. So if you use this option, you need to be using a headset attached to your computer.
-  → Dial handset button. This button will initiate the call at your handset. How this works, is your handset will ring once pushed. When you answer, it then dials the number you typed into the software.

**Bottom line: which button you click to let you start the call is important and governs where the call originates.**

### Directory Screen

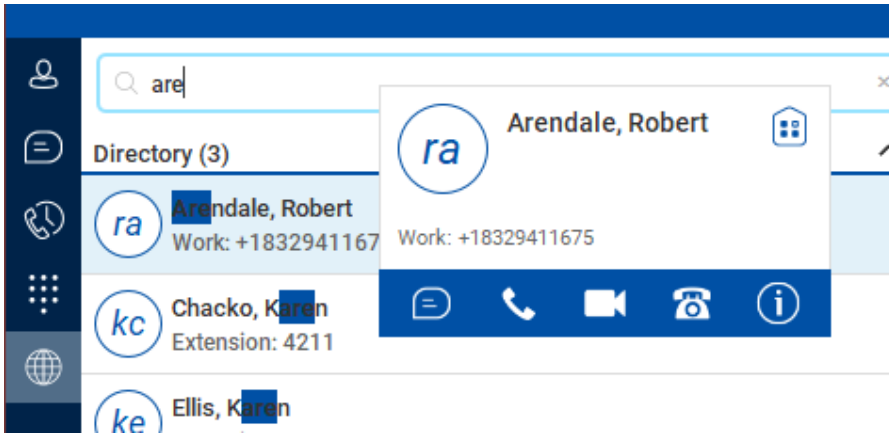
The directory for all RTS phones is searchable. You can also change the default sort from last name to first name if you wish. It can be searched by name, extension, phone number, or email.



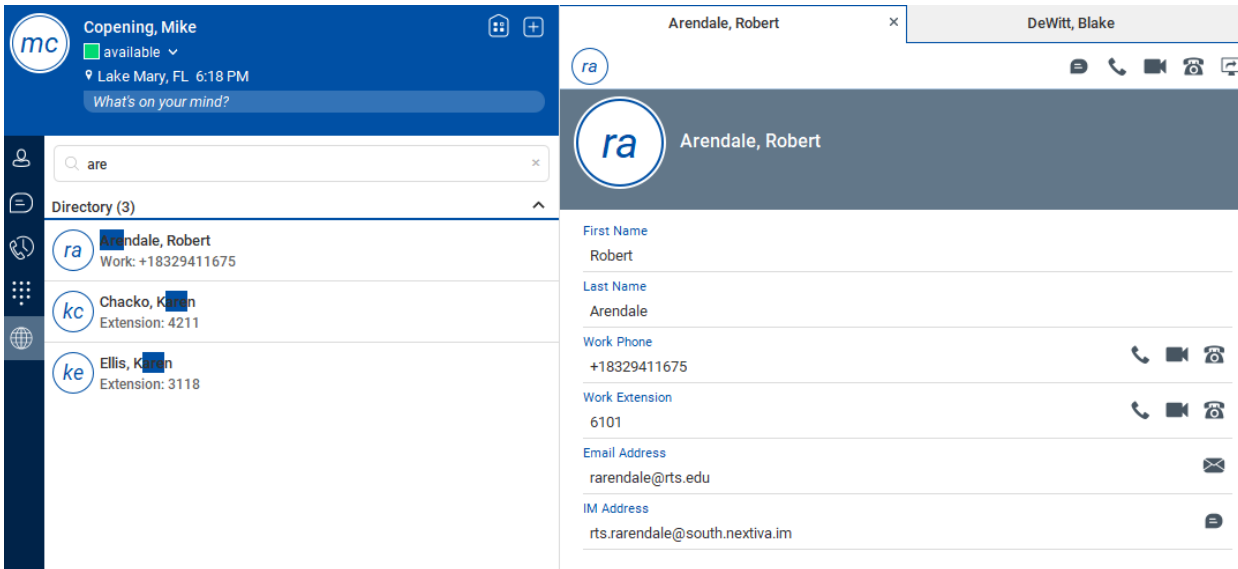
## Nextiva App Use Tips

### Hover over contacts

If you hover over a contact, you can see various options for quickly interacting. The icons match icons previously mentioned from the dial pad and chat sections.

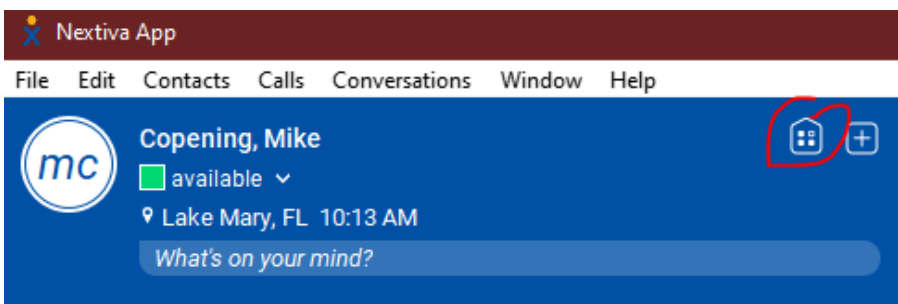


If you click on the (i) icon, you will see the full details pull up with buttons to interact with them.

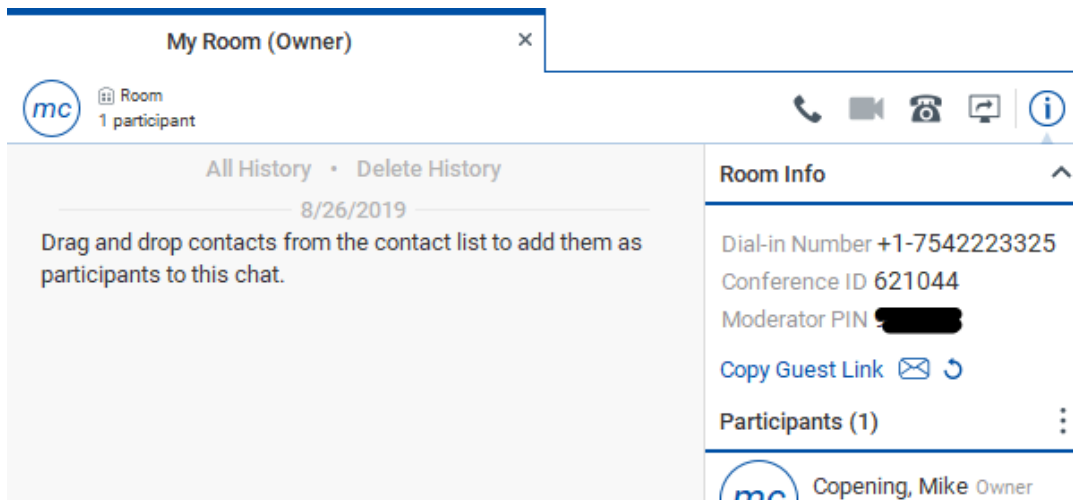


### Meeting Room






On the top right of the App exists a couple of buttons. One will reveal your personalized meeting room. Meeting rooms can be used for chats, screen sharing, video calling, and audio conference bridge. Participants can be within RTS or external to RTS. Every user with the app should have their own Conference ID and moderator pin. Your guests would use the conference pin when dialing in to connect. You would use the moderator pin. Meetings do not start unless a moderator is present.



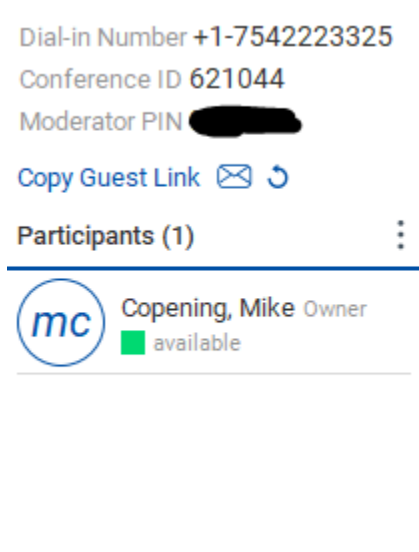
NOTE: RTS shares 50 total “connections” to all the assigned rooms, so while many people can use these simultaneously, we hope we don’t cross more than 50 people using this feature at the same time. We can always boost this number if needed and lots of people are constantly making use of their room.



Action icons in the room contain:

-  → Call room from softphone
-  → Video call in room
-  → Call room from handset
-  → Start screen sharing to room
-  → Room information.

Room info close up:



You will notice you can do three things with inviting people to a meeting:

- Copy guest link.
- Create an email with the guest information.
- Refresh / update the guest link. You can do this to end one meeting space and start a new one for screen sharing and otherwise.

Emails contain all this information for your guests:

DL...

Subject: Mike Copening would like you to join a meeting

You have been invited to join Copening, Mike's room for a meeting.

Nextiva App Users:  
Join Copening, Mike's room in Nextiva App.

Guest Participants:  
<https://cpsouth.nextiva.com/cgc?join=TWlrZSBDb3BlbmluZyxydHMubWNvcGV>

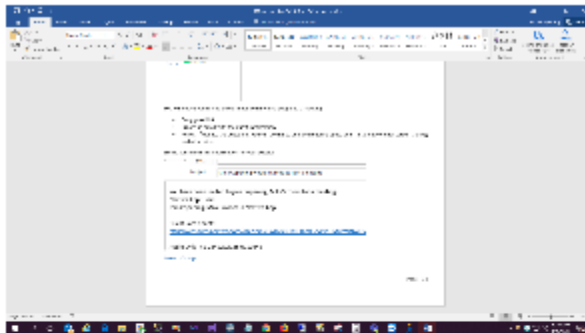
Audio Only: +1-7542223325,621044#

### Screen sharing

Screen sharing works a lot like other collaboration systems. You can share a specific monitor or specific app. These options are presented once you click the share screen button.

Share

Preview



### Select Display or Application

Note: Minimized windows cannot be shared. Re-open window to select it and press F5 to refresh.

Generic PnP Monitor (checked)

Generic PnP Monitor

Calculator

Internet Explorer

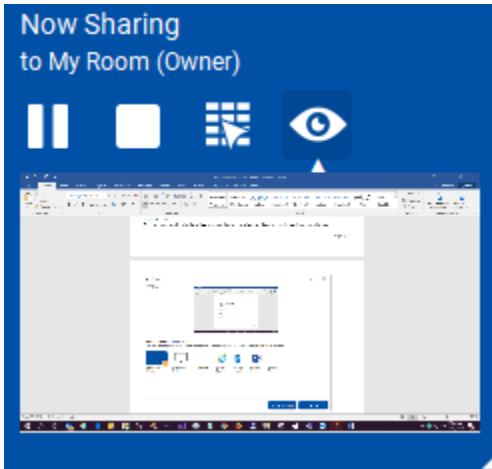
Microsoft Outlook

Microsoft Word

Snipping Tool

Start Sharing Cancel

Once you start sharing your screen, you will see a small control panel which will let you pause, stop, or switch what you are sharing:



### Guest Viewing Room

Guests can join from any supported computer and browser. They will supply their name and join the room.

Viewing : Mike Copening (Owner)

Room - Mike Copening

Call Mute Video Share

Additional Call Options

DIAL-IN NUMBER  
+1-7542223325

Conference ID: 621044#

CALL ME OPTION  
Enter your number, and we'll call you.  
ex: 123-456-7890 Call Me

Chat Participants 2

(Owner)

10:27 am chat from me

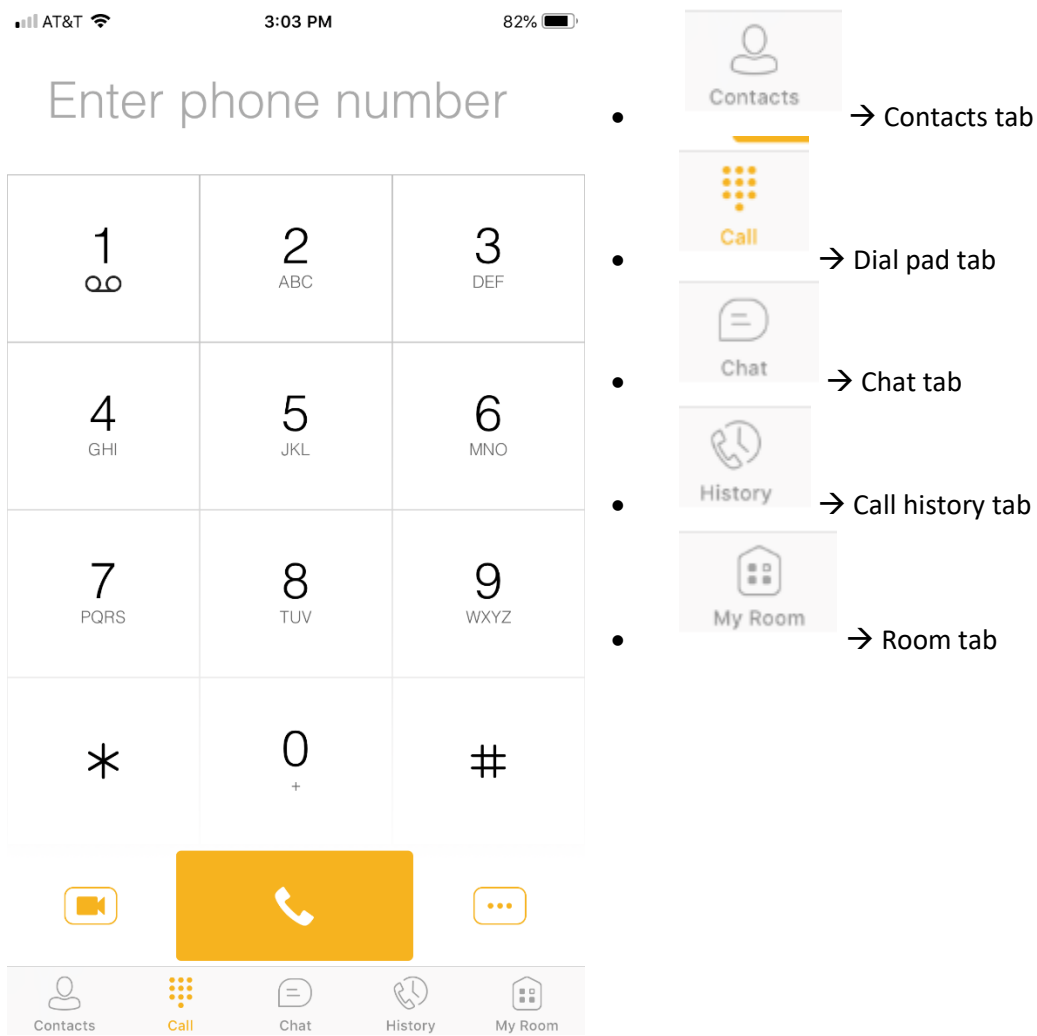
10:27 am this is cool

Mike Copening (Owner) glad you could make it 10:28 am

### Nextiva Mobile App

The mobile phone app from Nextiva can be installed on iOS and Android devices. This app essentially lets you take your office phone on the go. If you are logged into the app and enable notifications, your phone will alert you much in the same way you receive a cell phone call, but from Nextiva.

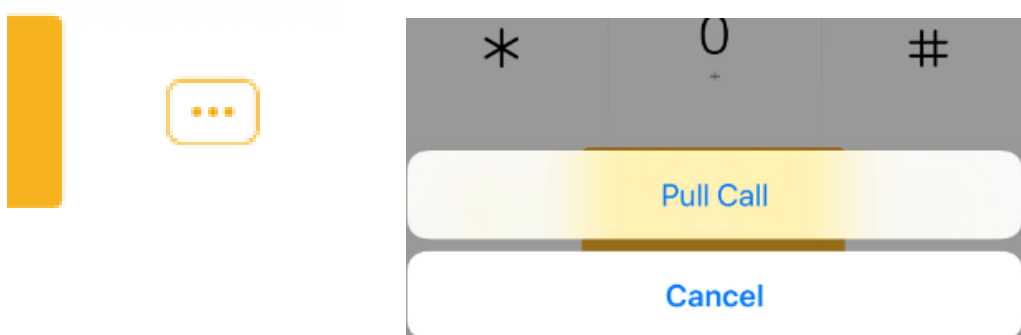
Once downloaded, you login with your username and password. The phone interface itself is very similar to the desktop app, with similar icons and organization. It doesn't have all the same features, but for basic calling and instant messaging, you can do pretty much everything you do in the main app.



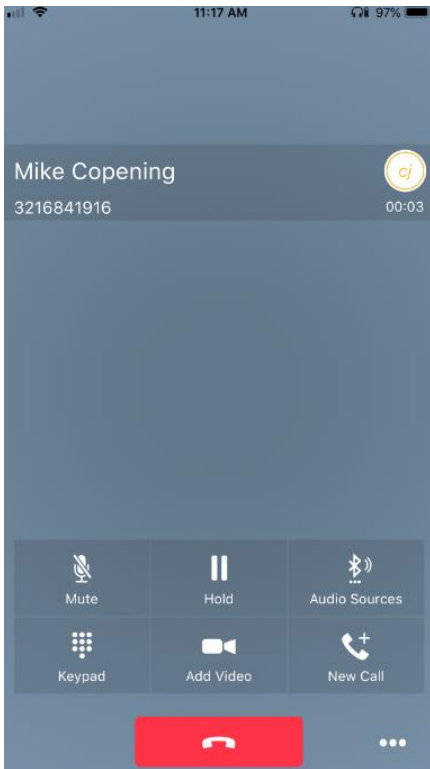
### Nextiva Mobile App Advanced Features

If you were at your desk and needed to start walking around, you can “pull” the call from your desk or softphone to the mobile app. There may be a split second of dead air, but the caller will likely not even realize you have seamlessly cutover your call to your smart phone app.

To do this, go to the dial pad and click the ellipses button. Then pick the “Pull Call” option.







As seen at the left. The call is now pulled from the handset to the phone app.

The ellipses also has some other fun features from the app (below) when connected to a call, such as merging multiple calls, transferring a call to another extension, or transferring to a mobile phone. So you could even transfer a call from Nextiva to a cell phone if you needed to do so.

