



Nextiva App

iPhone User Guide

Version 1.2

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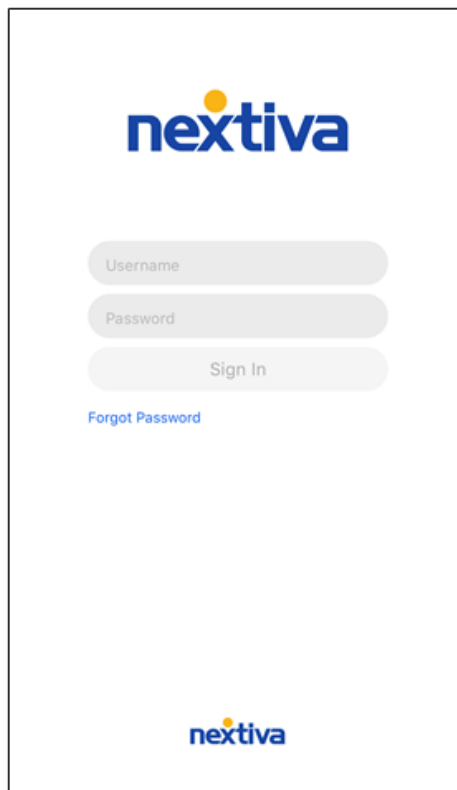
Getting Started

Installing

The Nextiva App for iPhone can be downloaded from the Apple App Store by searching **Nextiva** and downloading the Nextiva App.

Signing In

Enter the Nextiva Voice username and password and tap **Sign in**.



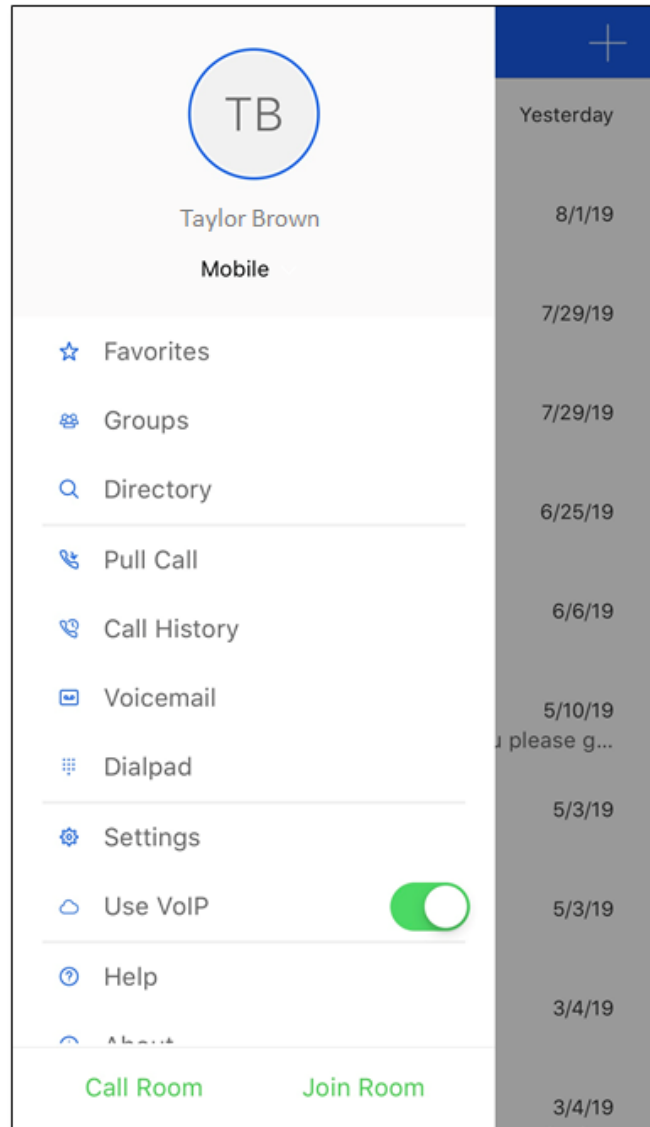
Nextiva App Sign In

NOTE: Users can choose the **Forgot Password** option to reset the password.

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

Nextiva App iPhone Interface

Swipe right or tap the **Menu** icon on the top left-hand corner to view the following options from the left panel.





Left Panel

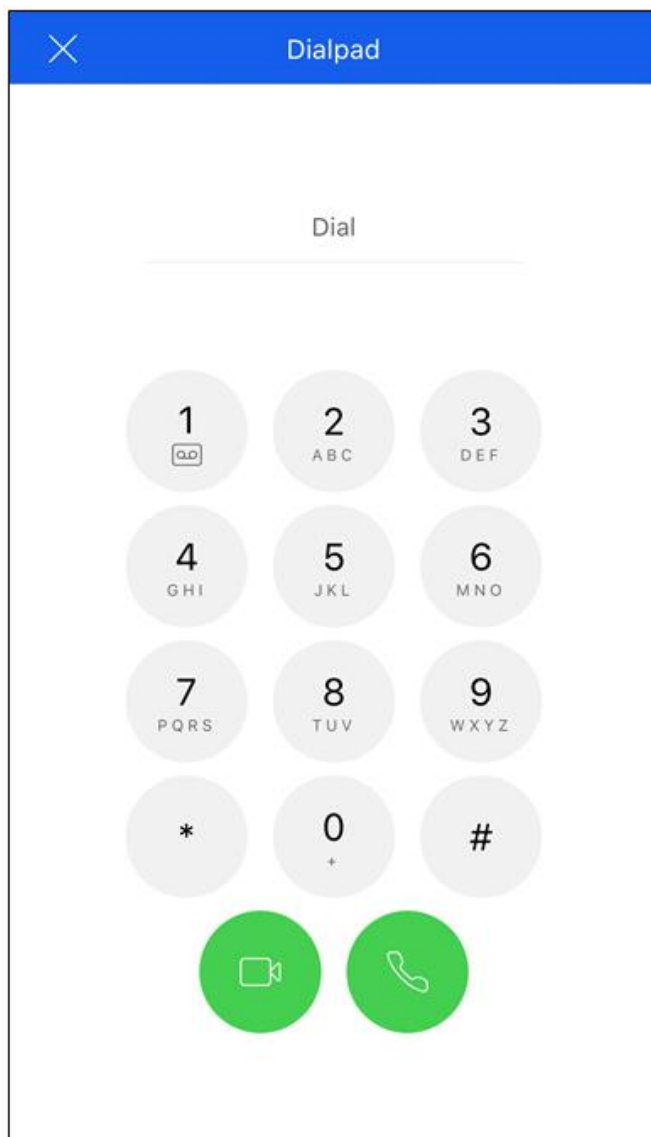
- **Favorites:** Adding contacts to Favorites allows users to easily communicate with other contacts without having to scroll through the Directory each time. For instructions on how to add favorites, [click here](#).
- **Groups:** Create Groups to instantly exchange messages with multiple team members. For instructions on how to create groups, [click here](#).
- **Directory:** All contacts within the Nextiva Voice system are pre-loaded into the Directory. The Directory contains all Auto Attendants, Call Centers, Call Groups, and Users that are in the Nextiva Voice account.
- **Pull Call:** Seamlessly pull an active call from your desk phone to the mobile app and vice versa, without any interruptions or disconnects.
- **Call History:** View all placed, received, and missed calls. For more information on call history, [click here](#).
- **Voicemail:** View and listen to all voicemails. For more information on how to check voicemail, [click here](#).
- **Dial Pad:** Used to make audio or video calls. For more information on how to make and receive calls, [click here](#).
- **Settings:** Manage call preferences, such as Call Forwarding, DND, and more.

Audio and Video calls

Making an Outbound Call

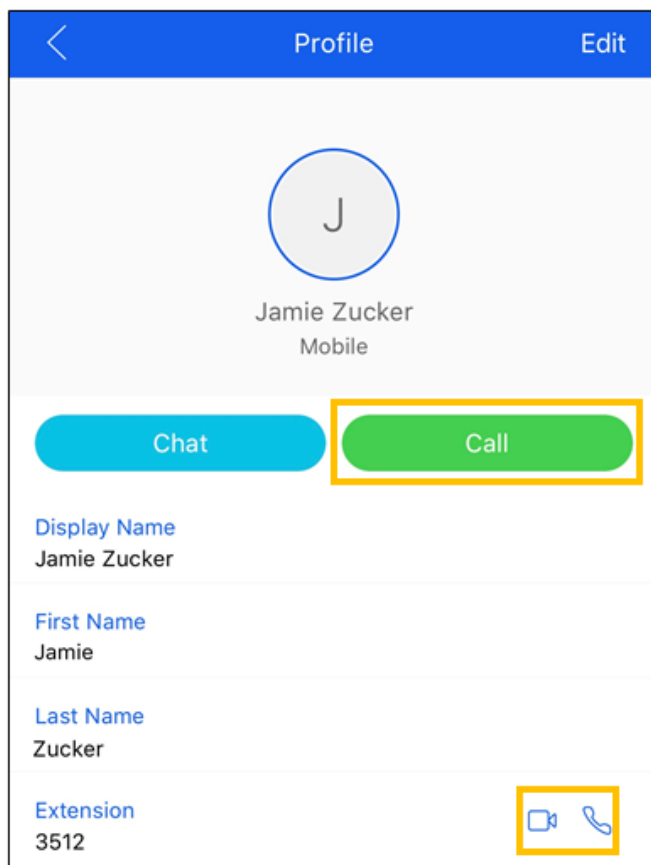
Make an outbound call from the Nextiva App using the following methods:

- Open the **Dial Pad**, enter a phone number, then tap the **Call**  button for an audio call or the **Video**  button for a video call.



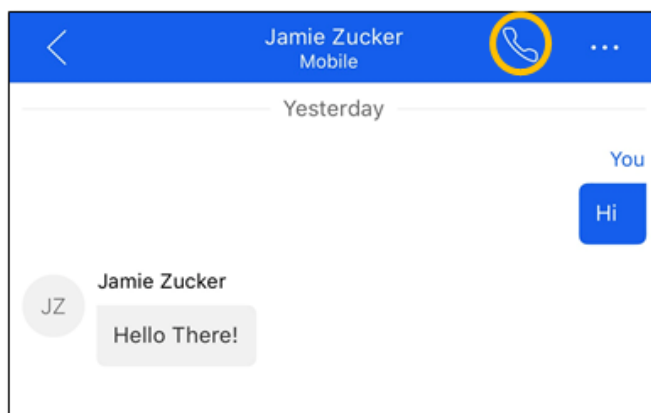
Dial Pad

- Tap on a contact and tap **Call**, or tap the **Call** button next to the phone number or extension to make an audio call. Tap the **Video** button to make a video call.



Call from Contact Profile

- Open a message and tap the **Phone** icon on the top right-hand corner.



Phone Icon

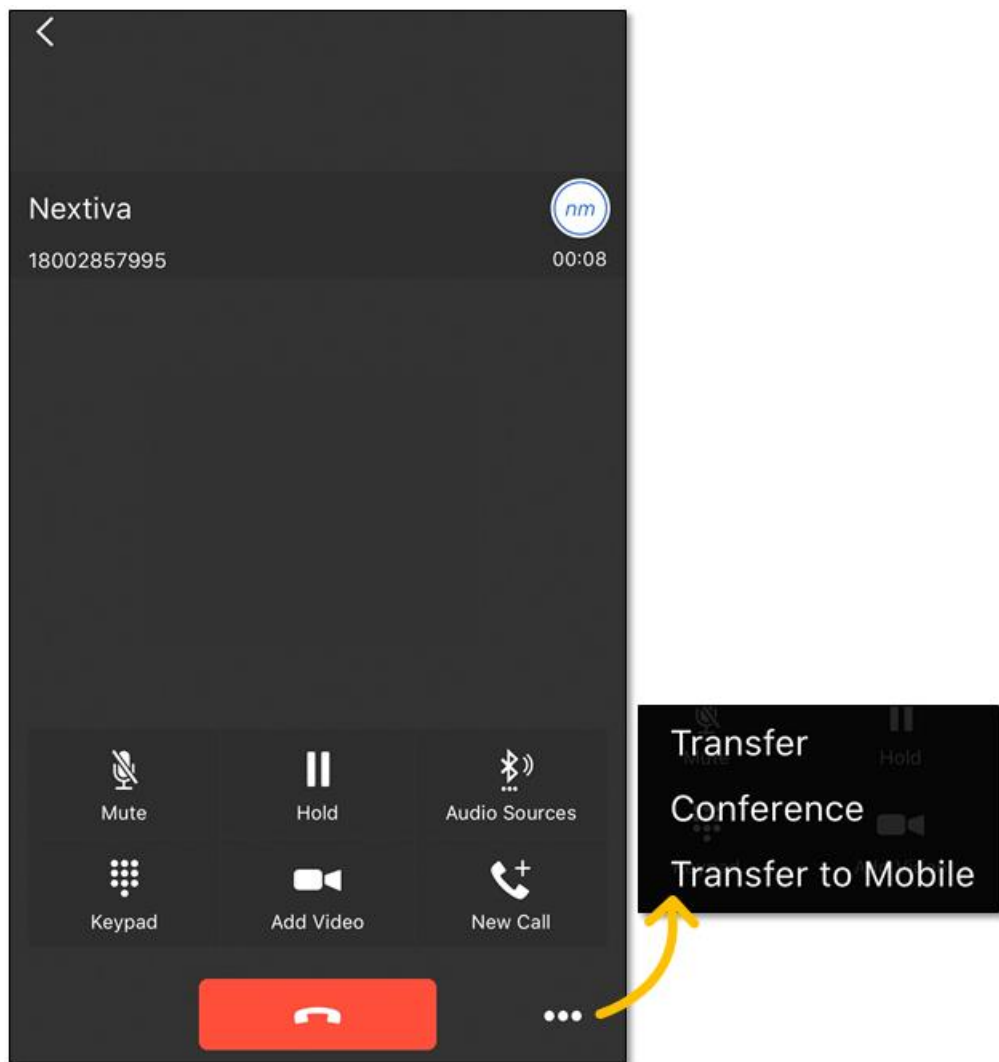
Answering Calls

When receiving an incoming call, there are two options displayed on the screen: **Answer** or **Decline**. Answer will allow the call to be answered. Decline will follow the User's Call Forward When Unanswered option, just like it would on a physical phone.

Active Call Actions

Once a call is answered, Users can perform the following actions:

- Mute the microphone
- Place a call on Hold
- Speaker
- Open the Keypad (Dial Pad)
- Add Video
- Make a New Call
- Send a Chat
- End Call
- Transfer a call
- Conference
- Transfer to Mobile

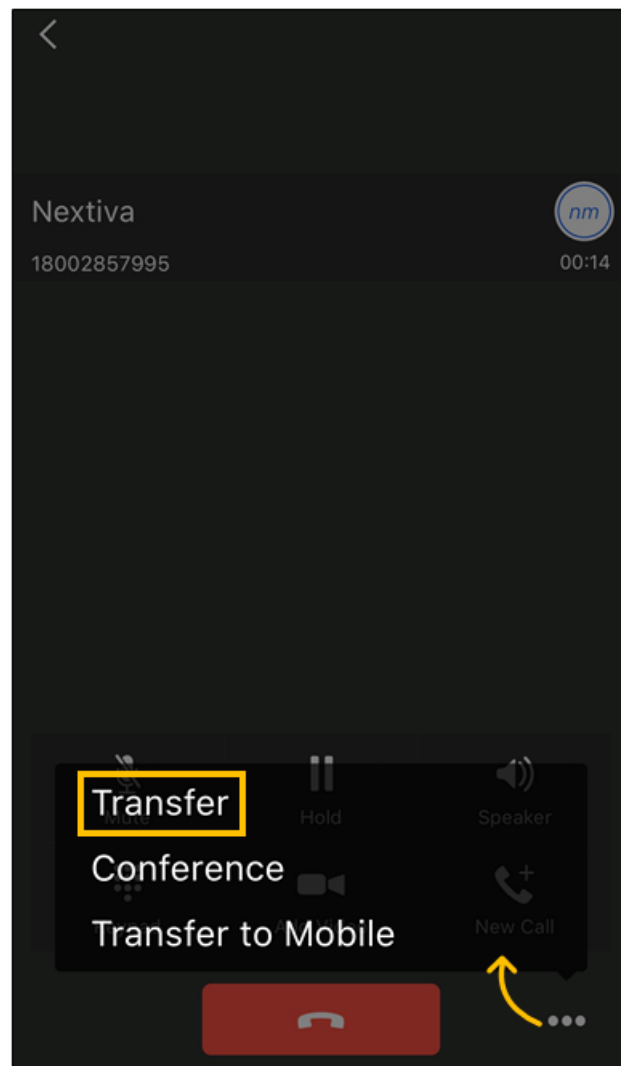


Active Call Actions

Transferring a Call

The Nextiva App supports transferring calls to another party. Users can transfer calls two ways:

- **Warm Transfer (attended):** While on an active call, tap the ellipses on the bottom right corner and select **Transfer**. Search and select a contact, choose **Voice Call** or **Video Call**. Then select the **Call First** option. Once the call is successfully established, complete the transfer by tapping the **Complete** button.
- **Blind Transfer (unattended):** While on an active call, tap the ellipses on the bottom right corner and select **Transfer**. Search and select a contact, then choose **Voice Call** or **Video Call**. Select the **Transfer to *contacts name***.



Transfer

Initiating a Three-Way Call

The Nextiva App supports calls with up to two additional participants. While on a two-way call, tap the ellipses on the bottom right corner and select **Conference**. Search and select a contact. Both participants will be displayed on the In Call screen once the conference is established. The other way to create a conference call, or to add participants to an existing conference call, is to tap **New Call**, and then select **Merge**.

Checking Voicemail

If there are pending voicemail (VM) messages, a red badge is displayed on the **Voicemail** tab indicating the number of pending VM messages. Tap **Voicemail** from the left panel to listen and delete voicemails. Users can also press and hold the number **1** key on the dial pad or dial ***86** to access the Voice Messaging portal.

Checking Call History

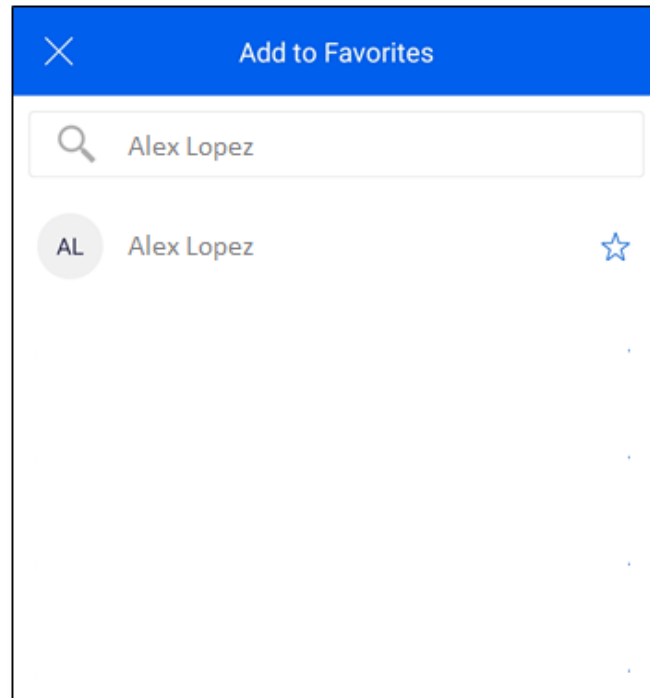
Notifications for missed calls are displayed as red badges on the Call History tab indicating the number of missed calls. Tap **Call History** from the left panel to view all placed, received, and missed calls.

Favorites

Adding a contact to Favorites allows users to easily communicate with other contacts without having to scroll through the Directory or Contact List each time.

Adding Favorites

1. Tap **Favorites**, then tap the **Plus (+)** icon on the top right corner.
2. Search the desired contact, then tap the contact to add to Favorites. The contact will automatically display under **Favorites**.



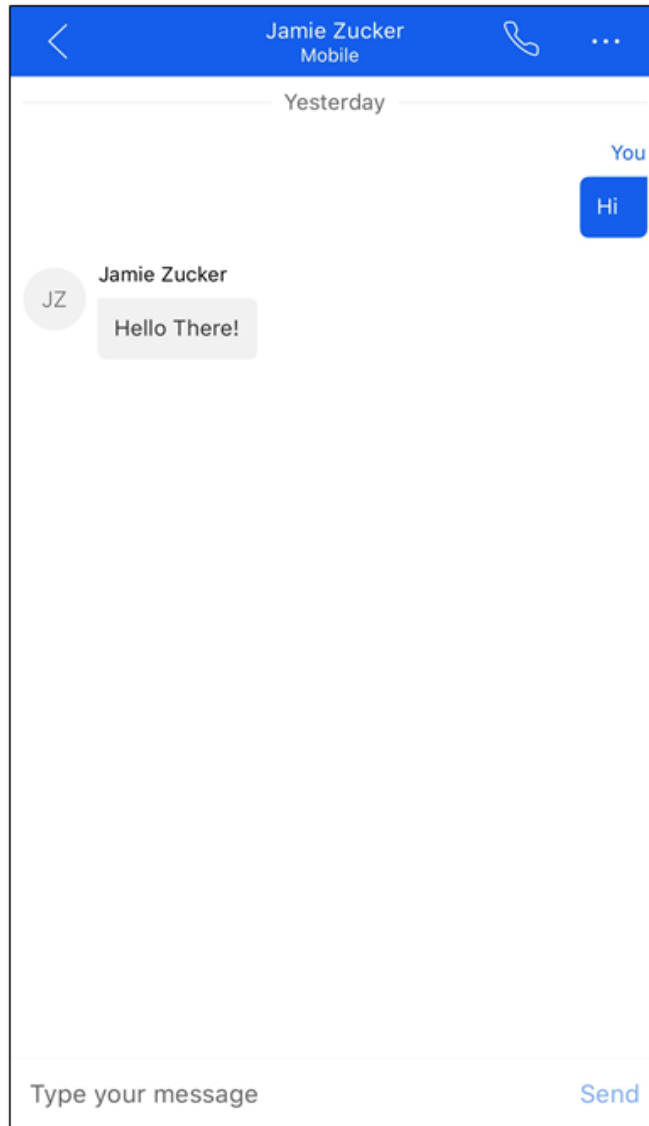
Add to Favorites

NOTE: Users can also tap on any contact and select **Add to favorites** under the contacts profile.

Instant Messaging

By default, all recent messages will be displayed when first launching the Nextiva App. Users can view and send messages using the following methods:

- Tap on any message to view the conversation and send a message.



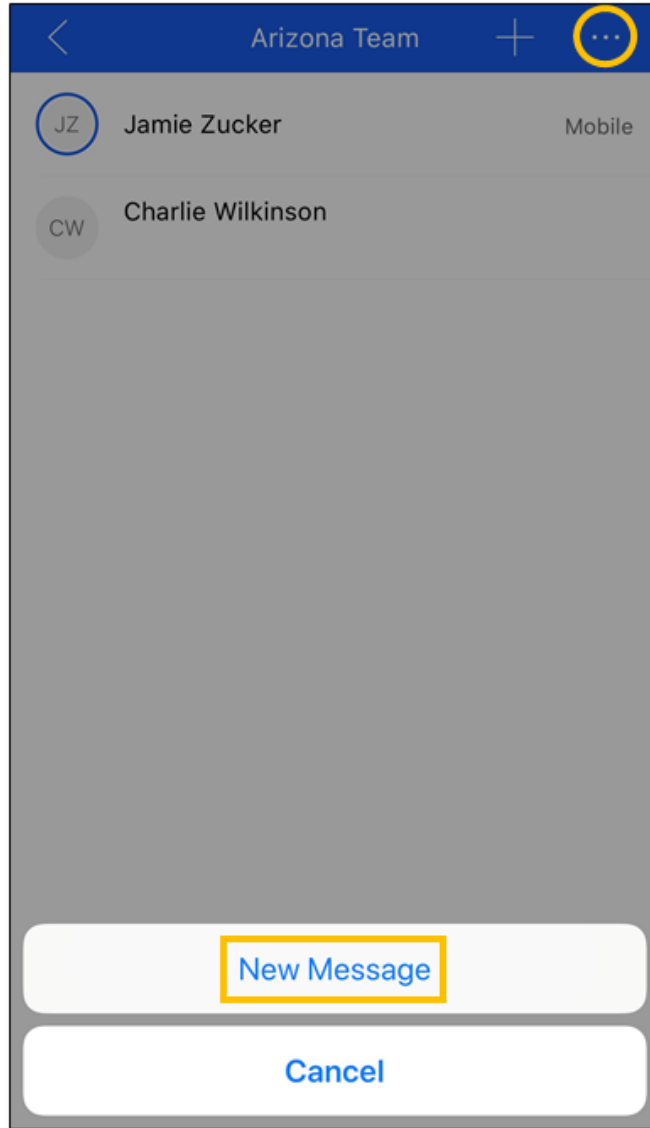
Instant Message

- Tap the **Plus (+)** sign under **Messages** to send a new message.
- Tap on any contact and tap **Chat** to view or send a message.



Chat Option

- Tap on any **Group** > **Menu** > **New Message** to send a group message.



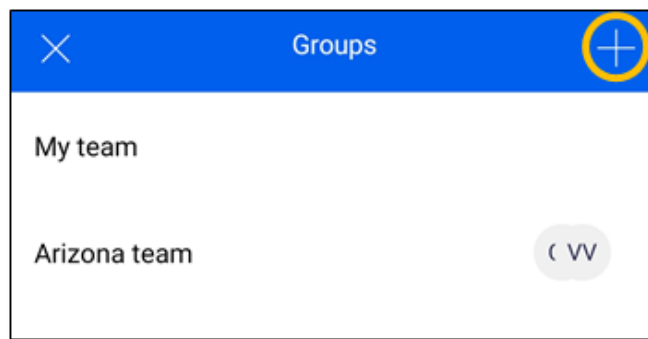
New Group Message

Contact Groups

Create Groups to instantly send messages to multiple contacts, easily collaborate with team members and keep contacts organized.

Creating Groups

1. Tap **Groups**, then tap the **Plus (+)** icon on the top right corner.
2. Enter a group name and tap **Create**.



Creating Groups

Adding Contacts to Groups

1. Tap on the group and tap the **Plus (+)** icon on the top right corner.
2. Search and select the desired contact(s), then tap **Done** to add to the group.

NOTE: Up to 30 participants can be added to a group.

Removing Contacts from Groups

1. Tap on the group and tap the **Menu** icon on the top right corner.
2. Tap **View Participants**.
3. Swipe right on the desired contact, then tap **Delete** to remove from the group.

Deleting Groups

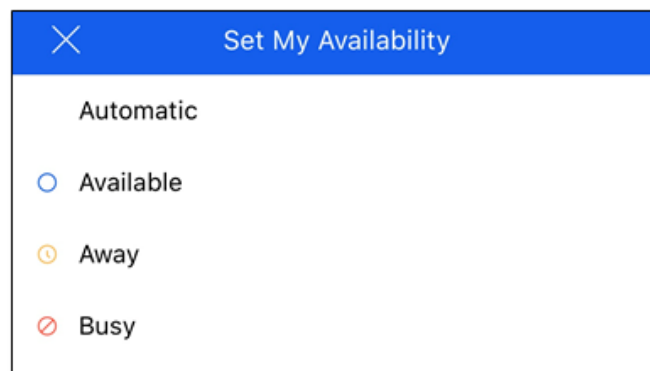
Under **Groups** swipe right on the desired group and tap **Delete**.

Team Presence and Status

Team Presence allows Users within the organization to view the availability of other team members. Users can also upload a profile picture and a personal message to be displayed.

Updating Team Presence

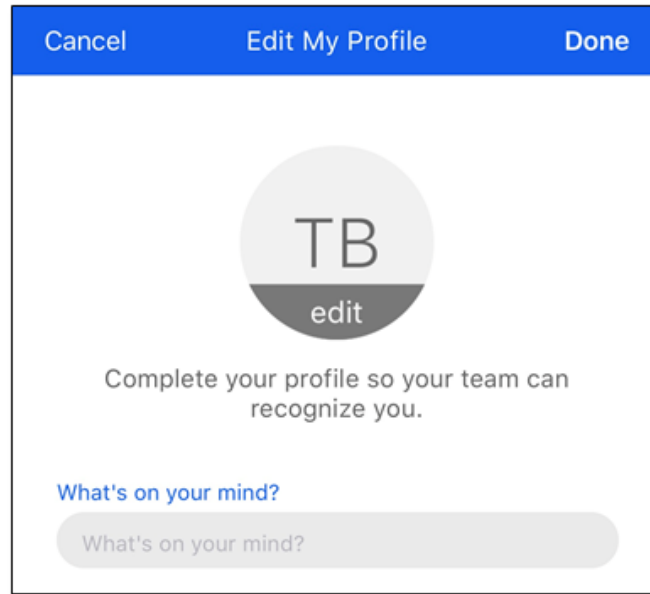
Team Presence will automatically indicate when the User is on a call or offline. To manually change availability, from the left panel, tap on the current availability displayed, and select the desired availability (available, busy, away). When on a mobile version of the App, Team Presence will automatically show “Mobile” to other App Users.



Team Presence Options

Updating My Status

1. From the left panel, tap on the profile picture or the circle with the User's first and last initials.
2. Tap **Edit**, then enter a message in the **What's on your mind?** field.
3. Tap **Done** to save and display the new status.

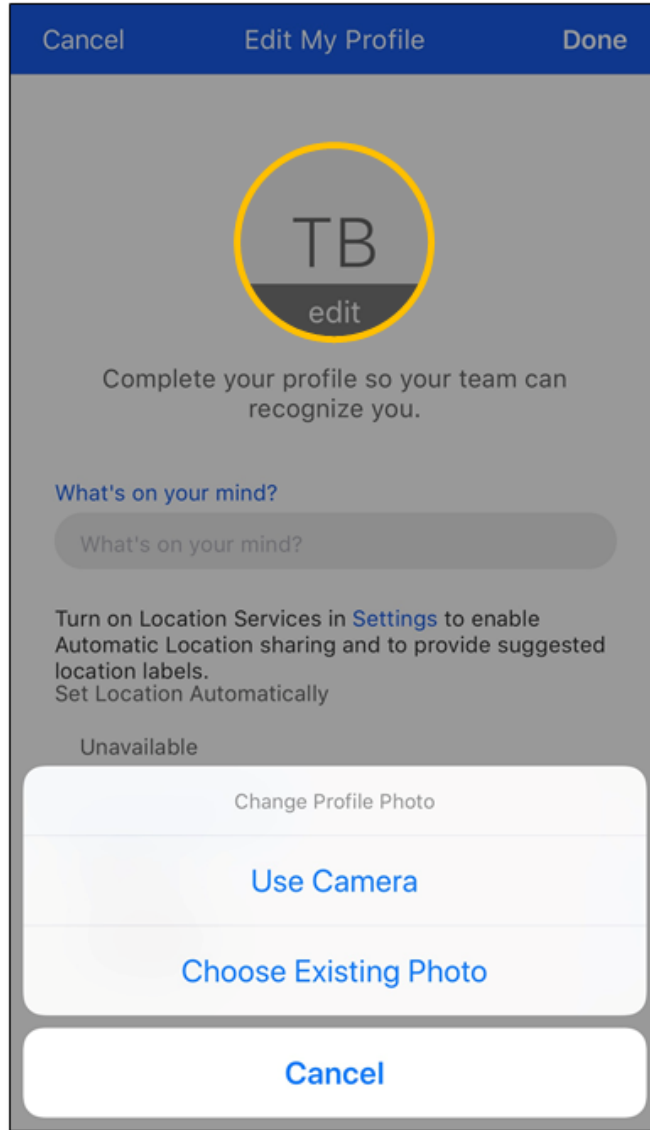


What's on Your Mind?

NOTE: Users can choose to share their location automatically or manually.

Updating My Profile Picture

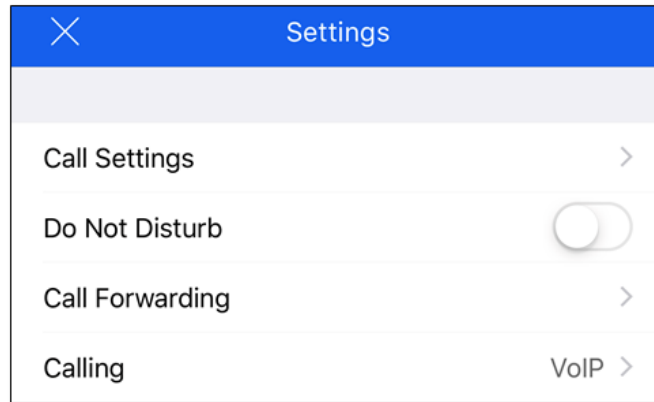
1. From the left panel, tap on the profile picture or the circle with the user's first and last initials.
2. Tap **Edit**, then tap **Edit** under the profile picture or the circle with the user's first and last initials to upload a profile picture.
3. Choose to **Use Camera** or upload an **Existing Photo**.
4. Tap **Done** to save and display the new profile picture.



Edit Profile Picture

Configuring Call Settings

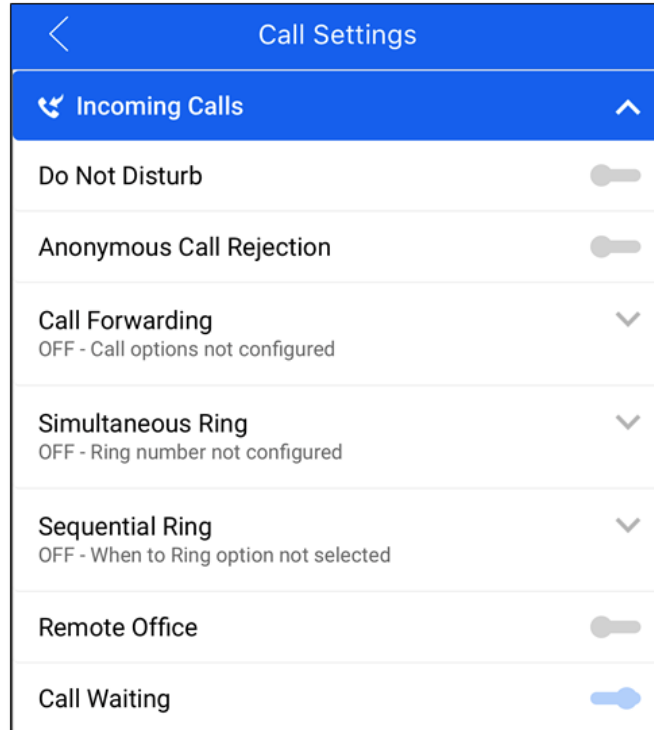
Swipe right or tap the **Menu** button on the top-left corner of the screen and tap Settings. Settings include the most commonly accessed user-level call settings and features, including Do Not Disturb, Forwarding, and Voicemail options.



Settings

- **Do Not Disturb:** Enable/disable Do Not Disturb.
- **Call Forwarding:** Enable/disable or update Call Forwarding Always settings.
- **Calling:** Choose how to make and receive calls from the Nextiva Mobile App. Users can choose to use VoIP or cell data and the desired network (Wi-Fi or 4G). If VoIP is enabled, the Caller ID will display the Nextiva phone number assigned to the User.

Under **Call Settings**, select **Incoming Calls** to turn on/off Do Not Disturb, Anonymous Call Rejection, Remote Office, and Call Waiting. Users can also configure or update Call Forwarding, Simultaneous Ring, and Sequential Ring settings.

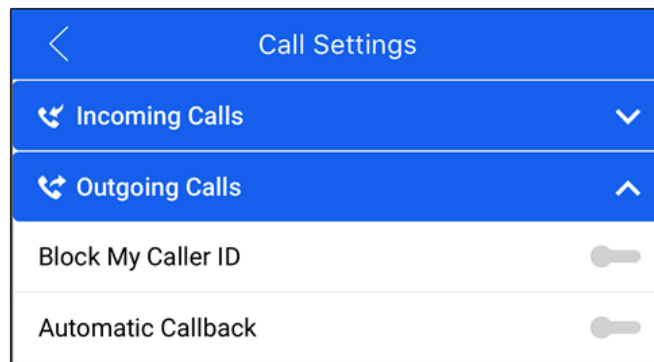


Incoming Calls Settings

Under **Outgoing Calls**, Users can configure the following settings:

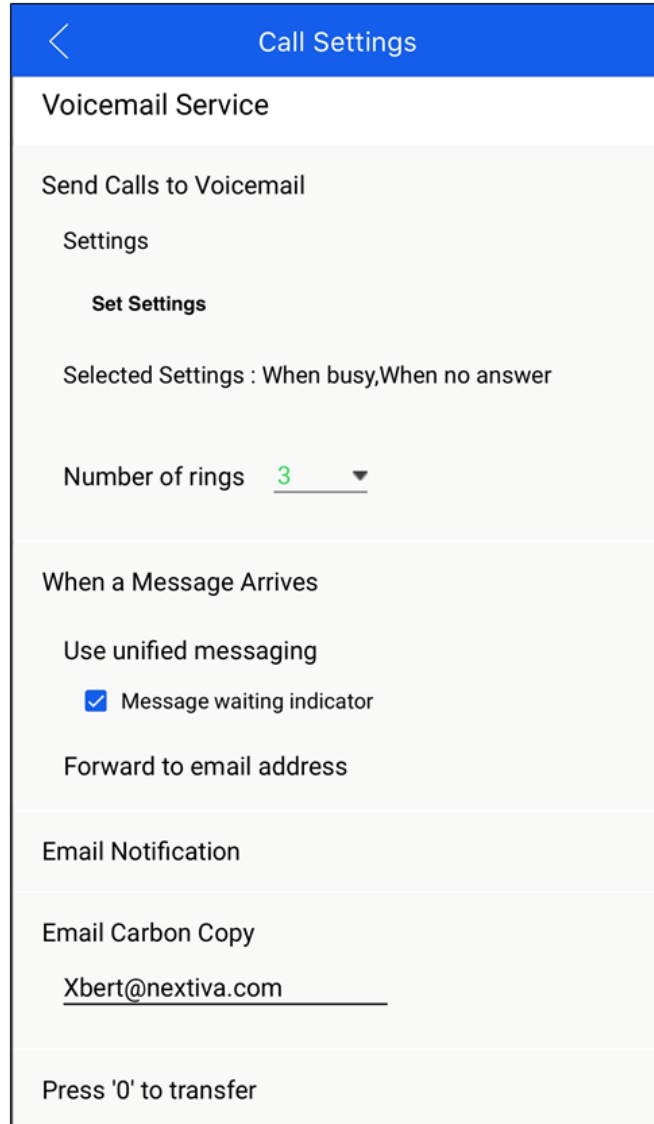
- **Block My Caller ID:** Block the outbound caller ID. The Caller ID will display Unavailable if this feature is enabled.
- **Automatic Callback:** If calling another Nextiva User in the same Group/Location, Users can receive an automatic callback if the other person is already on a call. This feature allows the caller to receive a call-back reminder as soon as the other party is available.

NOTE: The system will monitor the busy party up to 30 minutes to determine when/if they become available.



Outgoing Calls Settings

Under **Voicemail**, Users can configure many voicemail settings such as the number of rings before sending calls to voicemail, voicemail to email, and the option to press "0" to transfer to an operator during the voicemail greeting.

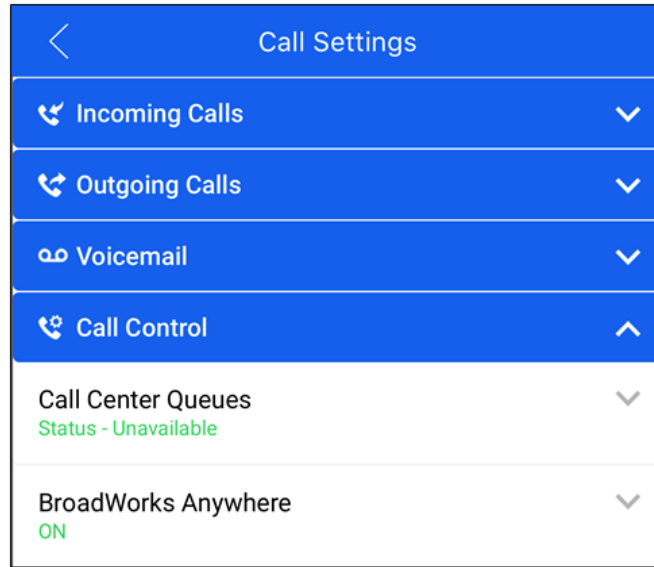


The screenshot displays the 'Call Settings' interface. At the top, there is a blue header with a back arrow and the text 'Call Settings'. Below this, the 'Voicemail Service' section is highlighted. Under 'Send Calls to Voicemail', there is a 'Settings' section with a 'Set Settings' button. Below that, it shows 'Selected Settings : When busy, When no answer'. The 'Number of rings' is set to 3, indicated by a green number and a dropdown arrow. The 'When a Message Arrives' section includes 'Use unified messaging' and a checked 'Message waiting indicator'. Below that is 'Forward to email address'. The 'Email Notification' section shows 'Email Carbon Copy' set to 'Xbert@nextiva.com'. At the bottom, there is a 'Press '0' to transfer' option.

Voicemail Settings

Under **Call Control**, Users can update Call Center ACD statuses and Nextiva Anywhere settings.

NOTE: Call Center Queues will only appear if the User is assigned to a Call Center Queue and has an assigned Call Queueing or Call Center license.



Call Control Settings

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