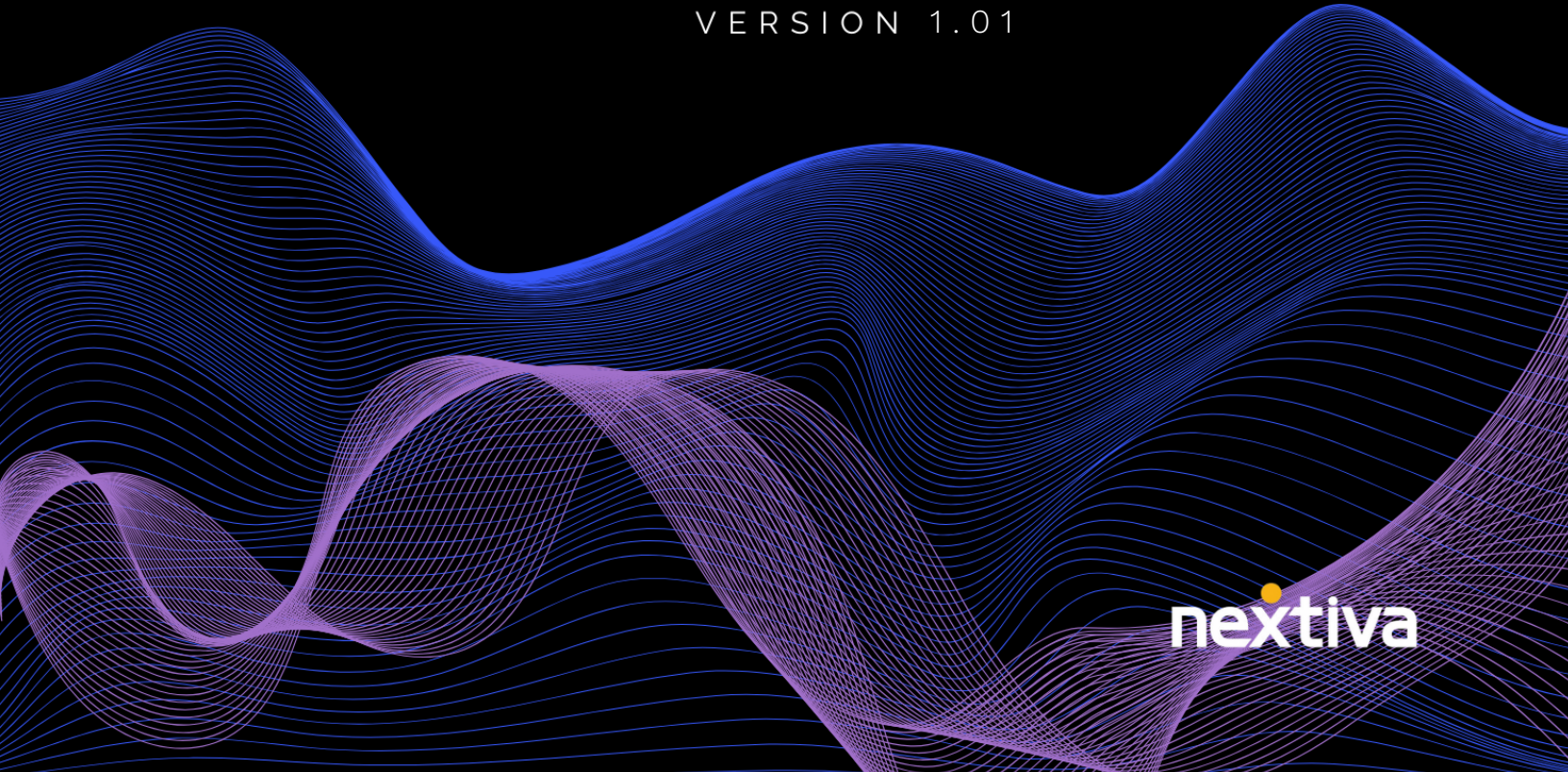


SERVICE DELIVERY
TRAINING TEAM

M E S S A G E
P R O

SERVICE DELIVERY CUSTOMER TRAINING
VERSION 1.01



nextiva

Nextiva Message Pro

This guide unlocks the power of Nextiva Message Pro, the system that empowers your team to handle customer texts together. Imagine:

- **Streamlined Communication:** Incoming messages get directed to your entire team, ensuring no inquiry gets lost.
- **Unified Replies:** Any team member can respond using the same number, keeping the conversation consistent.
- **Crystal Clear Visibility:** Everyone has access to the entire conversation history, fostering better collaboration and customer service.

Table of Contents

Logging In: Mission Control	2
Setting Up the Team: Assemble!	3
Create a new team	3
Building Your Text-Responding Task Force	5
Managing Conversations	7
Replying to a Message	8
Sending a Text Blast (From Your Team!)	9
Switching Teams on the Fly	11
Additional Resources	13

Logging In: Mission Control

1. Visit nextiva.com to access your **Communication Platform**.

XBert Tip: Using **Google Chrome** is your best bet for a smooth flight (avoiding errors and all).

2. Enter email address and password.
3. Select **Login**.
4. If you're new or forgot your password, no worries! Just select "**Forgot Password?**" and follow the prompts from the email Nextiva sends.

- a. Find the Reset Password email sent from no-reply@nextiva.com
- b. Select the **Reset Your Password link**.

Hi

You recently requested to reset your password for your Nextiva account. Use the button below to reset it.

[Reset your password](#)

The link is only valid for the next 24 hours.

If you did not request a password reset, please ignore this email. [Please Contact Support](#) if you have questions.

Thanks,

The Nextiva Team

- c. Follow the prompts to reset the password within 24 hours of receiving the email. If 24 hours passes, select "Forgot Password"



Sign in

Next

By clicking "Sign in", I agree that I have read and accept the [Nextiva Terms & Conditions](#).

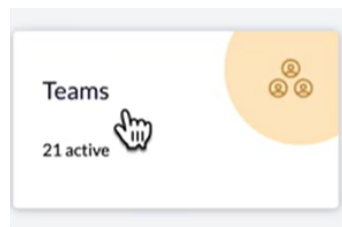
[Forgot Username?](#)

[Forgot Password?](#)

Setting Up the Team: Assemble!

Once you're logged in, it will be like looking at a control panel with Users, Teams, Roles.

Select **Teams** to access your team assembly area. Here, you can either **create** a brand new team or add Message Pro functionality to an **existing one**.



Create a new team

1. Select **Create Team**.



XBert Tip: Alternatively, choose "**Messaging**" from the **Actions** menu to enable messaging for an existing team.

Billing	1 user		
Boston sales team	4 users	(602) 900-0646	4328
Chicago sales team	2 users		8775

Edit Team

Voice Settings

Messaging

CRM Groups

Delete Voice

Actions

2. Assign a **phone number** to your team.

Admin Home / Teams / 1205161

Messaging

Team Text Messaging ☐ Off

Enable or disable team text messaging (SMS) services for this primary number

To enable team text messaging (SMS), you must assign a primary phone number.

Want to send & receive team text messages? Contact us at 1-800-799-0600 to get started.
Learn more about SMS for business.

Primary Number

PHONE NUMBER

Search

(480) 520-7191

(602) 900-0746

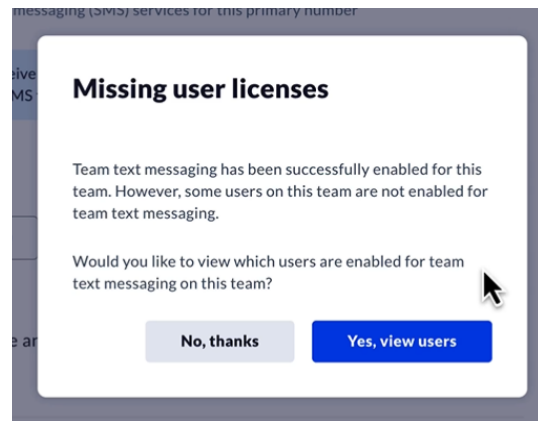
(602) 900-0749

(602) 900-0924

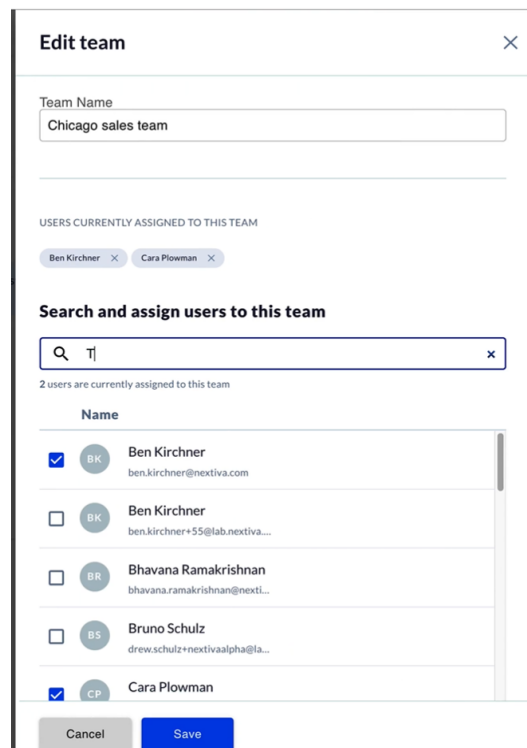
Building Your Text-Responding Task Force

After **enabling** Message Pro, it's time to assemble your text-responding crew!

1. Select the **team** you want to **handle messages** from the assigned number.



2. Edit the team members through the window on the right.



3. Add or remove team members as needed.
4. Select **Save**.

XBert Tip: You can choose whether to display team members' first names and last initials in outgoing messages.

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ADMIN HOME

Account Info

Licensing

Billing

PEOPLE

Users

Teams

Roles & Permissions

COMMUNICATION

Voice

Messaging

CUSTOMER JOURNEY

SmartTopics

Surveys

ADVANCED SETTINGS

Automations

CRM settings

Admin Home / Teams / 1205161

Messaging

Team Text Messaging On

Enable or disable team text messaging (SMS) services for this primary number

Want to send & receive team text messages? Contact us at 1-800-799-0600 to get started. Learn more about SMS for business.

Primary Number

PHONE NUMBER

(480) 520-7191

Additional settings

☒ Prepend first name and last initial of user when messages are sent from this team

Managing Conversations

Ready to see your team's teamwork in action?

1. Open the **NextivaOne app** on your device.
2. Locate and select the "Messaging" section within the app. Once in the Messaging section, you'll see clearly labeled team conversations.
3. Review Conversation History. Each team conversation will display a complete history of incoming and outgoing messages, including who sent each message.

Messaging

(480) 520-7439 x1825

(480) 863-1812 Market...

(480) 520-7438 Admini... 1

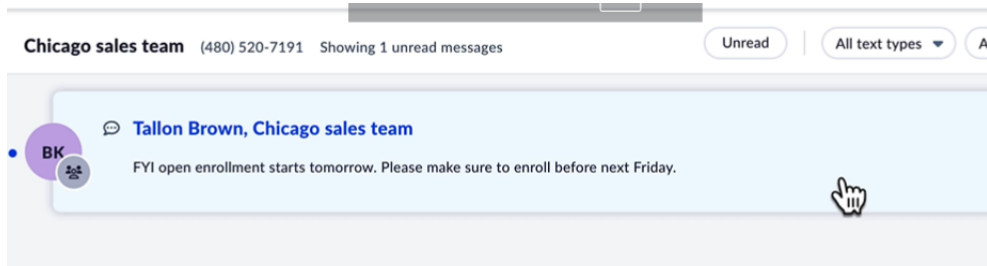
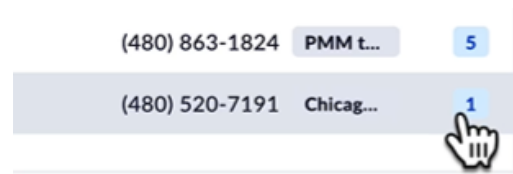
(480) 571-3267 Atlanta...

(480) 863-1824 PMM t... 5

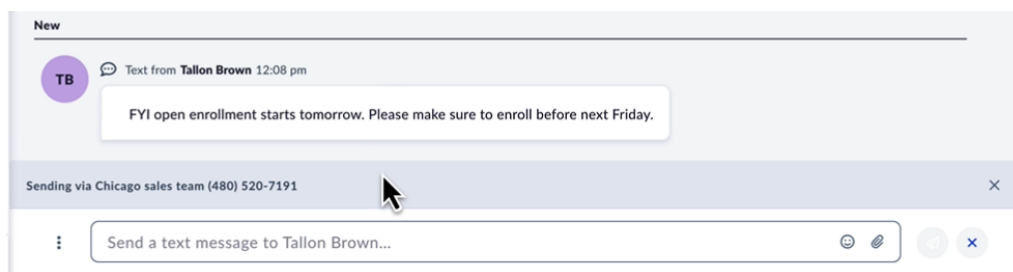
(480) 520-7191 Chicag... 1

Replying to a Message

1. Select the **team's number and name**. This opens up all the conversations they're handling.
2. **Pick** the specific conversation you want to reply to.



3. Type your message in the "**Send a text message to**" section.



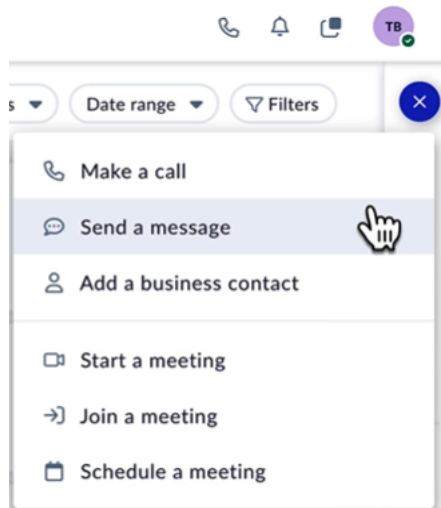
4. Select **Send**.

Sending a Text Blast (From Your Team!)

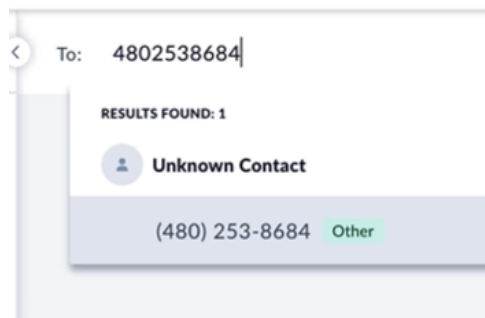
1. Select the **add button** (plus sign).



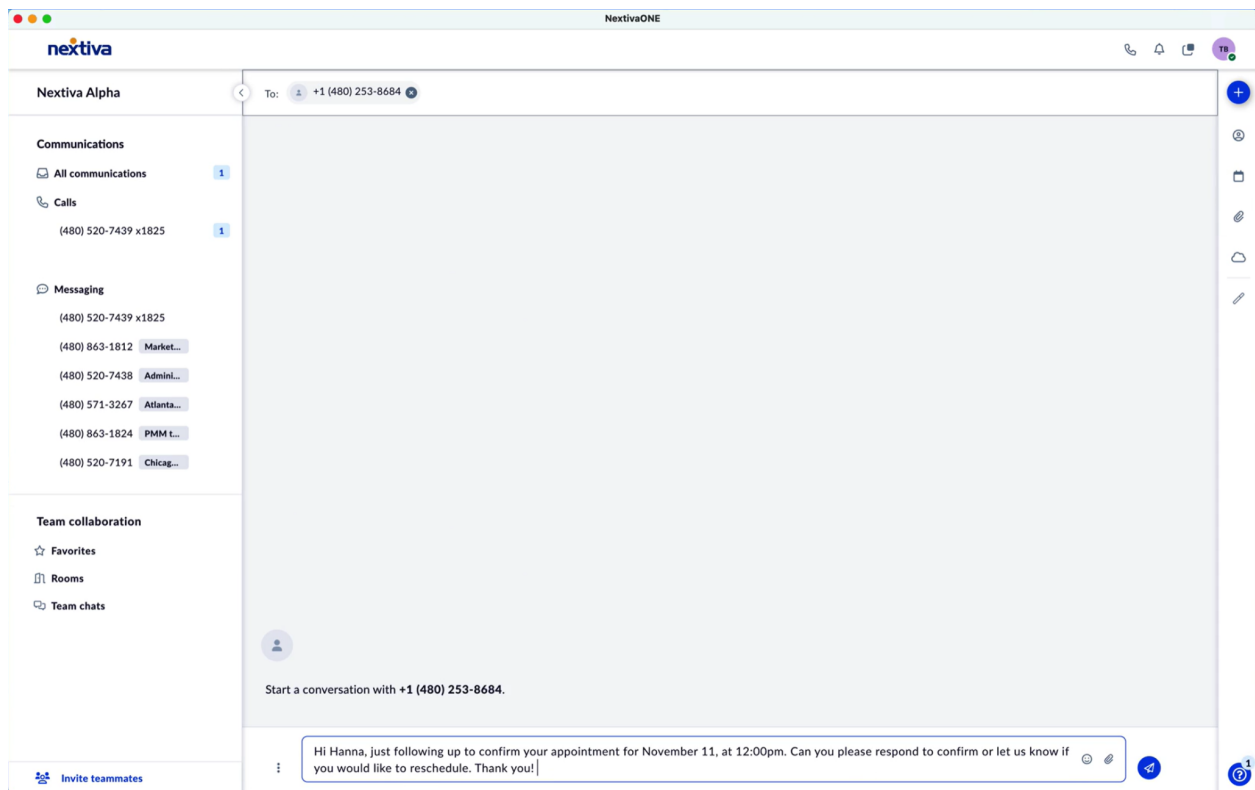
2. Choose **Send a message**.



3. Enter the **number** you want to reach or search your existing contacts.



4. Once sent, the team can collaborate to answer the customer's questions.

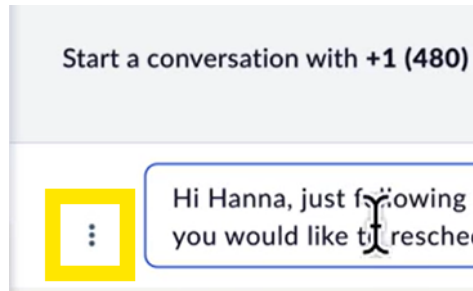


XBert Tip: Need to edit your team later? No problem! Just head to the "Team" section under Communications, select the team, and make your changes.

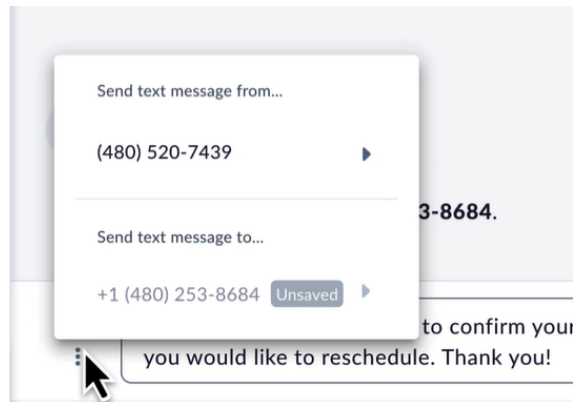
Switching Teams on the Fly

Need to switch between Message Pro teams?

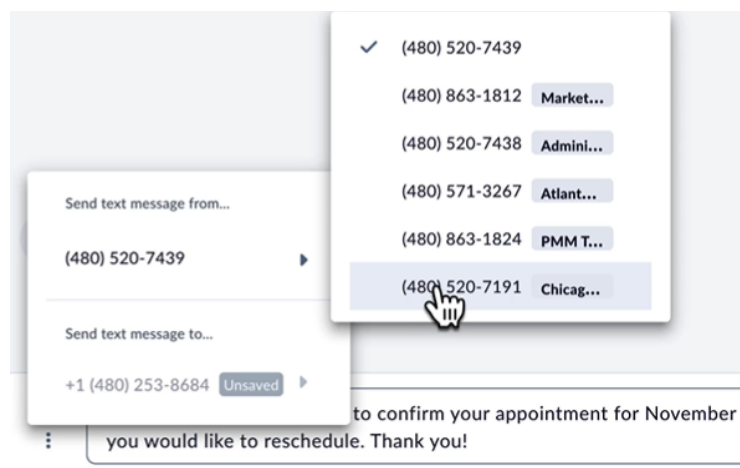
1. Open the team's message box.
2. Type your text.
3. Select the **ellipsis** (three dots) on the left.



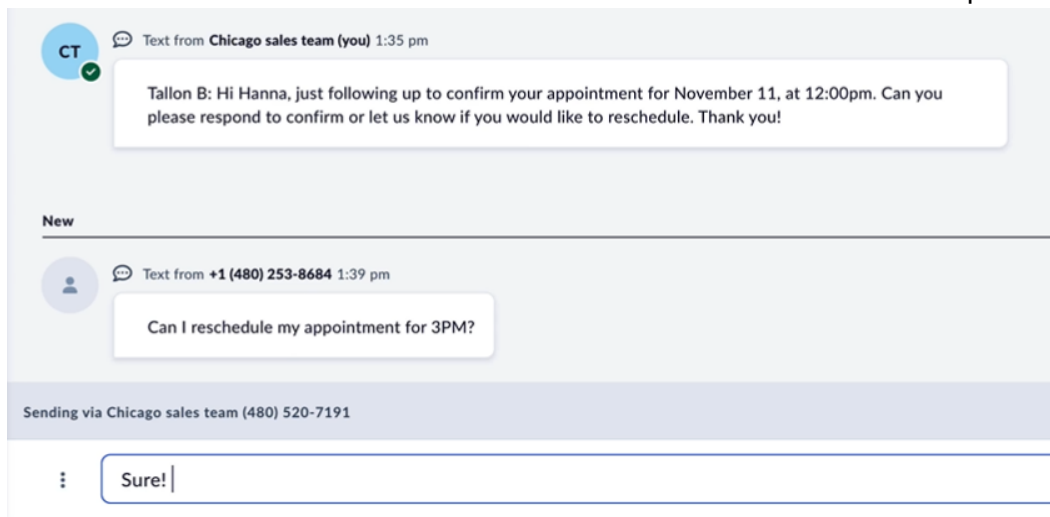
4. Select your **number**.



5. Select the team you would like to create a message from.



6. You are now able to work as a team and answer customers' questions.



Now that you're equipped with this guide, your team can conquer any customer text challenge. Remember, Nextiva Message Pro is all about collaboration and providing a seamless customer experience. Go forth and text conquer!

Additional Resources

[NextivaONE - Message Pro](#)

[NextivaONE - Message Pro Set Up](#) (37 sec)

[NextivaONE - Sending and Responding to Team Text Messages](#) (1 Min)