

NEXTIVA CX

SELF-SETUP GUIDE

SERVICE DELIVERY CUSTOMER TRAINING

VERSION 2.02



nextiva

Welcome to NextivaCX!

[Table of Contents](#)

Your Journey to Effortless Customer Engagement Starts Here

We're thrilled to have you join the NextivaCX community! We understand that effective customer communication is vital for any business, and we've built NextivaCX to empower you to connect with your customers seamlessly, no matter where they are.

Self-Guided Setup, Your Way

NextivaCX is designed with you in mind. We believe in empowering you to take control of your setup and configuration. That's why we've created a suite of resources to guide you every step of the way, including:

- **Intuitive Onboarding:** Our step-by-step onboarding process makes it easy to connect your channels, customize your settings, and get started quickly.
- **Comprehensive Knowledge Base:** Find detailed articles, FAQs, and troubleshooting tips in our extensive knowledge base.
- **Engaging Video Tutorials:** Learn at your own pace with our library of video tutorials, covering everything from basic setup to advanced features.
- **Live Webinars:** Join our live webinars for in-depth training, Q&A sessions, and best practices.

Choose Your Nextiva CX Path

To ensure you have the most relevant information at your fingertips, we've created separate Quick Start Guides tailored to your specific NextivaCX package:

- **Digital Package:** Perfect for businesses looking to master their online presence. Connect social media, messaging apps, and review sites to engage customers where they're already spending time.
- **Core Package:** Elevate customer connections with the power of voice. Combine inbound and outbound calling with your digital channels for a truly omnichannel experience.
- **Engage Package:** Supercharge your customer service with AI. Automate routine inquiries with a chatbot, freeing your team to focus on more complex issues. Plus, enjoy seamless integration with Microsoft Teams for streamlined collaboration.
- **Power Suite Package:** Take your customer experience to the next level. Gain deep insights into customer behavior with advanced analytics, transcription, and intelligent routing, empowering you to make data-driven decisions and deliver exceptional service.

Select the guide that matches your package and embark on your NextivaCX journey today!

XBert Tip: Check out this [article](#) to find which package you have!



NextivaCX : Digital

[Welcome to NextivaCX!](#) This Quick Start Guide will help you set up and personalize the platform for seamless customer communication.

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3. **Begin Your NextivaCX Journey** with **Onboarding Guided Setup** to follow our step-by-step guide to [configure your chat settings](#) and setup your team.
4. [Customize your workspace:](#) Workspaces help organize your workstreams. To get started, select the **home** icon from the left toolbar, name your workspace, and select **Next**. Name your default workspace. You can add more workspaces later!
5. **Invite your team:** [Add team members](#) so they can start collaborating.
6. **Connect your digital channels:** Follow the on-screen prompts to link your active social media accounts, messaging apps, and online review platforms. Digital manages **2 Social Media** & **2 Review** accounts.
7. The **Unibox** is where all your customer conversations come together. Learn how to filter, respond, and manage interactions efficiently. Check out the [Unibox Overview](#) and the [Unibox webinar](#) for a quick tour.

Need More Help? We have a wealth of resources available to support you!

- [This guide](#) is packed with resources to help you!
- Check out our [Video Hub](#), [Webinars](#), and [Help Articles](#).

We're confident that you'll find NextivaCX incredibly valuable for your business. Welcome aboard!

NextivaCX : Core

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3. On occasion, you may land on the NextivaOne Voice portal. No worries! To get back to NextivaCX, select the gray waffle in the top left corner before the Nextiva logo, then select **NextivaCX**.
4. **Begin Your NextivaCX Journey** with **Onboarding Guided Setup** to follow our step-by-step guide to [configure your chat settings](#) and setup your team.
5. **Customize your workspace:** Workspaces help organize your workstreams. To get started, select the **home** icon from the left toolbar, name your workspace, and select **Next**. Name your default workspace. You can add more workspaces later!
6. **Invite your team:** [Add team members](#) so they can start collaborating.
7. **Connect your digital channels:** Follow the on-screen prompts to link your active social media accounts, messaging apps, and online review platforms. Core manages **3 Social Media** & **3 Review** accounts.
8. The **Unibox** is where all your customer conversations come together. Learn how to filter, respond, and manage interactions efficiently. Check out the [Unibox Overview](#) and the [Unibox webinar](#) for a quick tour.

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NextivaCX : Engage

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4. **Begin Your NextivaCX Journey** with **Onboarding Guided Setup** to follow our step-by-step guide to [configure your chat settings](#) and setup your team.
5. **Customize your workspace:** Workspaces help organize your workstreams. To get started, select the **home** icon from the left toolbar, name your workspace, and select **Next**. Name your default workspace. You can add more workspaces later!
6. **Invite your team:** [Add team members](#) so they can start collaborating.
7. **Connect your digital channels:** Follow the on-screen prompts to link your active social media accounts, messaging apps, and online review platforms. Engage manages **10 Social Media** & **10 Review** accounts.
8. Customize and embed [Live Chat](#) on your website.
9. **Chatbot Builder:** Configure the chatbot to handle routine inquiries and free up your team's time.
 - a. Watch the [Creating a Chatbot](#) Video.
 - b. Attend the [Creating a Chatbot Webinar](#).
10. The **Unibox** is where all your customer conversations come together. Learn how to filter, respond, and manage interactions efficiently. Check out the [Unibox Overview](#) and the [Unibox webinar](#) for a quick tour.
11. Your Project Manager will assist you with other voice features.

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NextivaCX : Power Suite

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4. **Begin Your NextivaCX Journey** with **Onboarding Guided Setup** to follow our step-by-step guide to [configure your chat settings](#) and setup your team.
5. **Customize your workspace:** Workspaces help organize your workstreams. To get started, select the **home** icon from the left toolbar, name your workspace, and select **Next**. Name your default workspace. You can add more workspaces later!
6. **Invite your team:** [Add team members](#) so they can start collaborating.
7. **Connect your digital channels:** Follow the on-screen prompts to link your active social media accounts, messaging apps, and online review platforms. Power Suite manages **unlimited Social Media & Review** accounts.
8. Customize and embed [Live Chat](#) on your website.
9. **Chatbot Builder:** Configure the chatbot to handle routine inquiries and free up your team's time.
 - a. Watch the [Creating a Chatbot](#) Video.
 - b. Attend the [Creating a Chatbot Webinar](#).
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Table of Contents

[Welcome to NextivaCX!](#)

[Self-Guided Setup, Your Way](#)

[Choose Your Nextiva CX Path](#)

[NextivaCX : Digital](#)

[NextivaCX : Core](#)

[NextivaCX : Engage](#)

[NextivaCX : Power Suite](#)

[Table of Contents](#)

[Account Setup Overview](#)

[What is NextivaCX?](#)

[Seamless Omnichannel Engagement](#)

[Included in Your Nextiva Package](#)

[Initial Setup](#)

[Accessing from the website](#)

[Core + \(Voice Packages\): Switching from NextOS or NextivaONE](#)

[Initial NextivaCX Setup](#)

[Connecting Your Digital Channels](#)

[Selecting Digital Channels](#)

[Account Setup Overview](#)

[Setting Up NextivaCX](#)

[Onboarding Widgets](#)

[Welcome to Nextiva Widget](#)

[Workspaces](#)

[My Team](#)

[Navigate to My Team](#)

[Change the Role of a User](#)

[Social Channels Widget](#)

[Connect Your Social Channels](#)

[Monitor Competitors](#)

[Add Competitor Accounts](#)

[Online Reviews Widget](#)

[Review Platforms](#)

[Benefits of Managing Online Reviews](#)

[Connecting Review Channels](#)

[Messaging Apps Widget](#)

[Connect Your Messaging Apps](#)

[Live Chat Widget](#)

[Customize Your Live Chat](#)

[Get Started](#)

[Bot Builder Widget](#)

[Get Started](#)

[Editing an Existing Chatbot](#)

[Email & Integrations Widget](#)

[Connect an Email Account](#)

[Gmail Steps](#)

[Outlook Steps:](#)

[Complete Setup Widget](#)

[Set Up Case Routing](#)

[Tips & Tutorials Section](#)

[Customize Your Dashboard](#)

[Additional Account Setup](#)

[Inviting Your Team to NextivaCX](#)

[Role Types](#)

[Choose the right role for each team member based on their responsibilities and the level of access they need within NextivaCX.](#)

[From NextOS](#)

[Team members are managed within the NextOS platform. You can create, edit, and remove team members directly from NextOS.](#)

[Your Team Members' First Steps](#)

[Navigation Toolbar Overview](#)

[Home](#)

[Onboarding Tab](#)

[Dashboard Tab](#)

[Unibox](#)

[Access the Unibox](#)

[Dashboard](#)

[Summary Dashboard](#)

[Setting up a Summary Dashboard](#)

[Pin your Dashboard](#)

[Remove a Dashboard](#)

[Compare Dashboard\(s\)](#)

[Setting up a Compare Dashboard\(s\)](#)

[Key Elements of your Compare Dashboard](#)

[Total Volume](#)

[Reviews](#)

[Demographics](#)

[Word Cloud & Top Tags](#)

[Sentiment Share](#)

[Trend Analysis](#)

[Volume Trends](#)

[Share of Voice](#)

[Publishing a Post Immediately](#)

[Scheduling a Post for Later](#)

[Survey](#)

[Create a new survey](#)

[Audience](#)

[Key Features and Benefits](#)

[Unibox](#)

[What's an Interaction?](#)

[Accessing the Unibox](#)

[How Interactions Appear](#)

[Managing Conversations](#)

[Filtering the Unibox](#)

[Saving Filters](#)

[Selecting Interactions from the Unibox](#)

[Responding in the Unibox](#)

[Changing the Case Status in the Unibox](#)

[Playmode](#)

[Accessing Playmode](#)

[Navigating Through Cases in Playmode](#)

[Assigning Cases in Playmode](#)

[Changing the Case Status in Playmode](#)

[Responding to Cases in Playmode](#)

[Filtering Playmode](#)

[Exit Playmode](#)

[Live Chat](#)

[Setting up Live Chat](#)

[Live Chat Example](#)

[Inserting the Chat URL into a Website](#)

[Wix](#)

[Square Space](#)

[Wordpress](#)

[GoDaddy](#)

[Live Chat Advanced Settings](#)

[Setting Up After Hours](#)

[Questionnaires](#)

[Pre-Chat Questionnaire](#)

[Post Chat Questionnaire](#)

[Chatbot Builder](#)

[Navigating to the Chatbot Builder](#)

[Through Settings](#)

[Through The Home Page](#)

[Builder Interface](#)

[Building Your Chatbot's Conversation Flow](#)

[Accessing the Chatbot Builder](#)

[Creating a Chatbot](#)

[Creating Nodes](#)

[Connecting Nodes](#)

[Visualize the Flow](#)

[Previewing the Chatbot](#)

[Editing a Node](#)

[Node Creation Summary](#)

[Connecting the Chatbot to Live Chat](#)

[Filtering to See Chat Messages](#)

[Responding to Chat Messages](#)

[Chatbot Interactions in Unibox](#)

[End of Chatbot Flow](#)

[Flexibility and Control](#)

[Messaging Apps](#)

[Navigating to Messaging Apps](#)

[Instagram](#)

[Facebook Chat](#)

[Link Facebook and Instagram](#)

[Linking from Instagram](#)

[Linking from Facebook](#)

[Verify the Connection in NextivaCX](#)

[X \(Twitter\) Chat](#)

[WhatsApp](#)

[Viber](#)

[Telegram](#)

[Telegram Bot](#)

[Twilio](#)

[Finding the Account SID, Access Token and Phone Number](#)

[Finding the Service SID](#)

[Organizer & Workbaskets](#)

[Organizers: Automate Routine Tasks](#)

[Accessing the Organizer](#)

[When to Use the Organizer](#)

[Creating an Organizer Rule: Step-by-Step](#)

[Workbaskets: Teamwork Made Easy](#)

[Using the Organizer to Assign Cases to a Workbasket](#)

[Calendar](#)

[Turn on Business Hours](#)

[Create a New Calendar](#)

[Adding or Editing Holiday Hours](#)

[Settings](#)

[Inviting Users Through Settings](#)

[Changing User Settings](#)

[Creating Custom Role and Permissions](#)

[When to Use Custom Roles](#)

[How to Create a Custom Role](#)

[Assigning the Custom Role to a User](#)

[Suggested Responses](#)

[Access Suggested Responses](#)

[Create a New Response](#)

[Editing a Suggested Response](#)

[Troubleshooting](#)

[Essential Workspace Setup](#)

[At Least One Social Media Channel](#)

[An Organizer with Rules](#)

[A General Workbasket with Users](#)

[Chatbot is Not Working](#)

[Are You in the Right Workspace?](#)

[Is the Correct Chatbot Activated?](#)

[Confirm the First Node in Flow is Start Node](#)

[Can't Connect Your Instagram or Facebook Page?](#)

[Ensure You Have a Business Page](#)

[Sharing Your Ideas: Submitting Feature Requests](#)

[Submit a Feature Request](#)

Account Setup Overview

What is NextivaCX?

NextivaCX is your all-in-one platform to manage customer relationships, build your brand, and deliver exceptional digital support. No more juggling different tools – connect all your communication channels in one place and simplify how you interact with your customers.

Seamless Omnichannel Engagement

With NextivaCX, you can:

- Connect with customers on their favorite channels, from social media to email to live chat (depending on your package type).
- Track social mentions and reviews to stay on top of your brand reputation

Note: NextivaCX Digital focuses on digital interactions; it does not include voice features.

Included in Your Nextiva Package

We've made it easy to get started – NextivaCX comes with every Nextiva small business package. Depending on your plan, you'll get access to even more features:

- **Digital:** Perfect for businesses starting their digital journey. Connect social media, email, and other channels for seamless online communication. Digital manages **2 Social Media & 2 Review** accounts.
- **Core:** Add voice capabilities (inbound and outbound calls) to your digital toolkit. Core manages **3 Social Media & 3 Review** accounts.
- **Engage:** Level up your customer service with a chatbot and Microsoft Teams integration for seamless communication and collaboration. Engage manages **10 Social Media & 10 Review** accounts.
- **Power Suite:** Unlock advanced features to deliver a truly enterprise-level customer experience. Power Suite manages **unlimited Social Media & Review** accounts.

XBert Tip: The ChatBot Builder is exclusively available in our Engage and Power Suite packages. If you're on the Digital or Core package, this feature is an additional charge if used. If you'd like to upgrade to include chatbot, reach out to Sales or your Project Manager today!

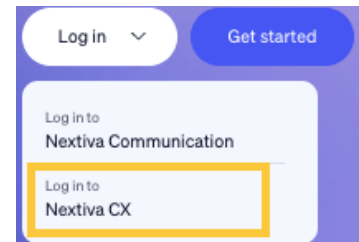
Initial Setup

Logging into an Account

Accessing from the website

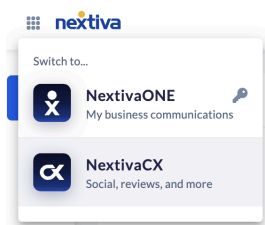
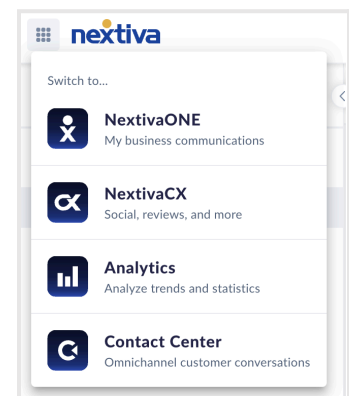
Log in to the NextivaCX account by following the steps below:

1. Navigate to Nextiva.com.
2. Select the Login button at the top of the page.
3. Select NextivaCX.
4. Enter the username and password to login.



Core + (Voice Packages): Switching from NextOS or NextivaONE

1. Log into **Nextiva** (above).
2. Locate the **waffle icon** in the top left corner of the screen.
3. Select the icon to open the app menu.
4. Select **NextivaCX** from the list.
5. You're now ready to explore and configure NextivaCX to enhance your customer interactions!



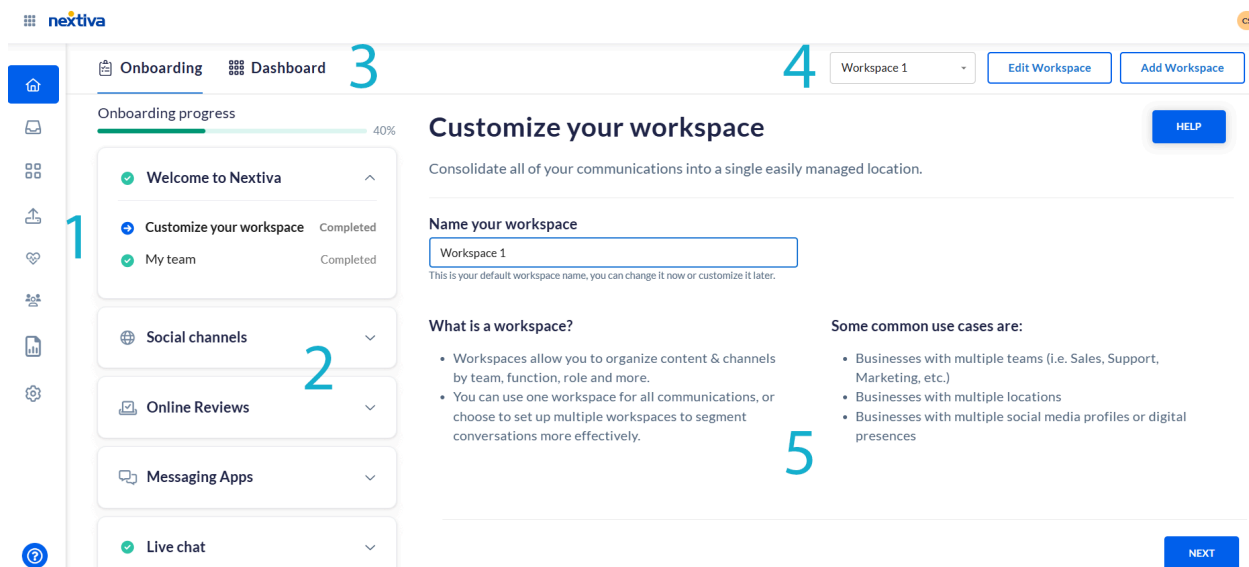
XBert Tip: If access to an application is not available, a key will appear next to the application. In the example to the left, only NextivaCX is available so NextivaONE appears with a lock next to it in the waffle menu.

Initial NextivaCX Setup

When you log into NextivaCX for the first time as the Account Owner, you'll land on the Onboarding tab. This tab acts as your guide, providing you with step-by-step instructions on how to set up your account and start using NextivaCX effectively.

On the Onboarding tab, you'll find:

1. **Navigation Toolbar:** This toolbar on the left side of the screen helps you navigate to different sections of NextivaCX.
2. **Onboarding Widgets:** These interactive widgets provide clear instructions on how to connect your channels, customize your settings, and more.
3. **Dashboard Tab:** The Dashboard gives you a visual overview of your chat analytics, helping you track key metrics and monitor your performance.
4. **Workspaces:** Workspaces allow you to organize your customer interactions and keep specific chats and channels in one place, making it easier for your team to collaborate and stay focused.
5. **General Instructions & User Guides:** Find helpful tips and links to our user guides, where you can learn more about specific features and functionalities within NextivaCX.



Connecting Your Digital Channels

The first exciting step is to choose which digital channels you, All Admins, want to connect. NextivaCX gives you the power to bring all your customer interactions into one place:

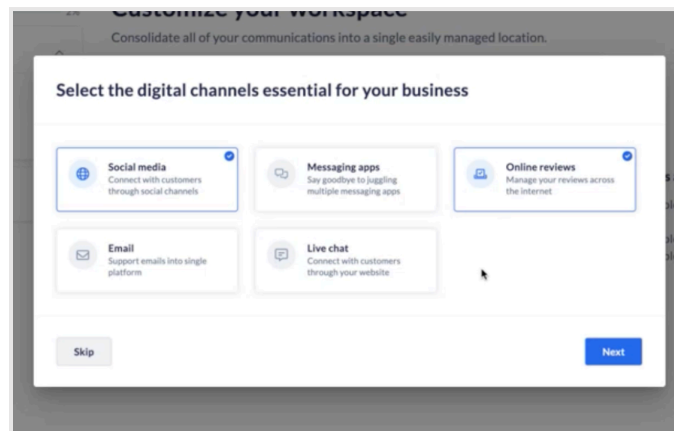
- **Social Media:** Connect your Facebook, X (formerly Twitter), Instagram, YouTube, and LinkedIn accounts to engage with customers directly within NextivaCX.
- **Messaging Apps:** Link your private messaging channels like Facebook Messenger, X DMs, Instagram, Telegram, Viber, WhatsApp, and Twilio. Now you can respond to all your messages from a single platform!
- **Online Reviews:** Manage and respond to reviews from popular sites like Yelp and Google Reviews, all within NextivaCX.
- **Email:** Connect your email to have all incoming messages routed directly to the NextivaCX Unibox. This streamlines your customer communication and allows you to use our powerful help desk features to manage and respond to inquiries efficiently.
- **Live Chat:** Add a live chat widget to your website so customers can reach out in real-time. All chat messages will appear in your Unibox, ready for you to respond (depending on your package type).

XBert Tip: As an admin, you'll complete the initial onboarding. Once that's done, other Admins on your account can also make changes.

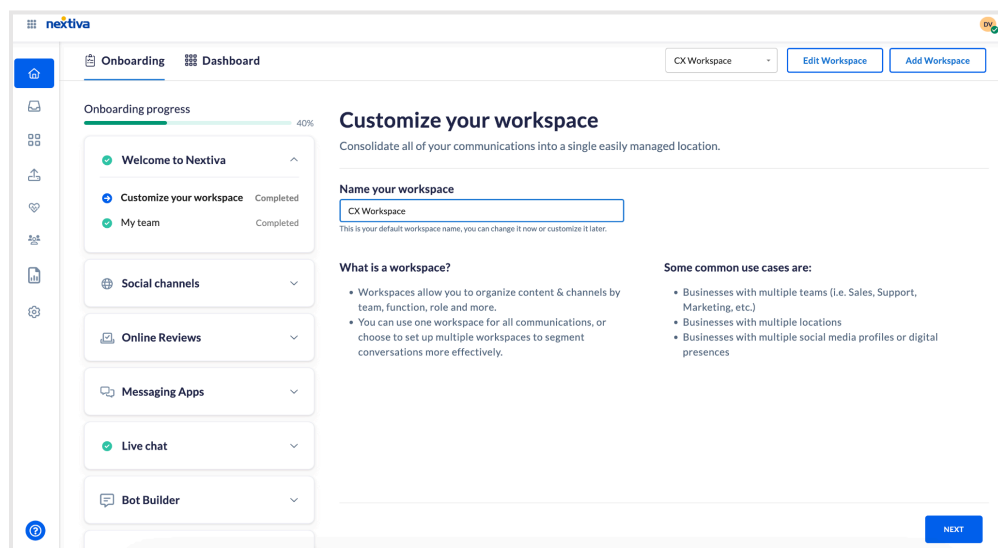
Selecting Digital Channels

To kick off your NextivaCX journey, you'll need to select the digital channels you want to connect to your account. The first time you log in a handy popup will appear, showcasing the available channels. To select your channels, follow the steps below.

1. Select the tabs that contain the channels you wish to connect.
2. The selected channels will be highlighted in blue.
3. Once all desired channels have been selected, select the Next button.



4. The popup will disappear and you will see the **Onboarding tab** in the Home Page of NextivaCX.
5. All selected channels will appear on the left side of the screen. Ensure that the channels selected are present.



XBert Tip: If the popup does not appear or if the channels need to be edited at a later date, select the edit button to change.

Account Setup Overview

Setting Up NextivaCX

 Onboarding  Dashboard

The Onboarding tab in NextivaCX is your launchpad for setting up your account. It's designed to provide clear instructions and track your progress as you go. **Only the Account Owner and Admins have access to the Onboarding tab and the ability to connect channels and adjust account settings.**

On the Onboarding tab, you'll find a collection of helpful widgets on the left side of the screen, each designed to guide you through a specific aspect of the setup process. *These vary depending on your package type.*

Onboarding Widgets

✓ Welcome to Nextiva ▼

Welcome to Nextiva: where the Workspace can be customized and displays who has access to that workspace.

✓ Social channels ▼

Social channels: where Facebook, Twitter, Instagram, Youtube and LinkedIn are connected.

 Online Reviews ▼

Online Reviews: where the review channels are connected.

 Messaging Apps ▼

Messaging Apps: Here you are able to connect your private messaging apps.

✓ Live chat ▼

Live Chat: provides instructions on how to build, customize, and apply Live Chat to their website.

 Bot Builder ▼

Bot Builder: where the Account Owner and Admins create their automated chat bots.

✓ Email and integrations ▼

Email and Integrations: provides the ability to connect emails into the NextivaCX platform.

✓ Complete setup ▼

Complete Setup: the Account Owner and Admins are able to access additional tips and tricks and customize their dashboard.

To successfully complete the onboarding process for a new account, it is important to go through each widget on the side of the screen and set up the desired features.

As you select a widget, additional information will appear, including the estimated setup time predicted to complete each task.

As the Account Owner or Admins navigate the onboarding process, ensure you select the Next button at the bottom right of the screen to save your progress. This keeps the onboarding flow in order, following the list on the left side. Each step's directions are provided.

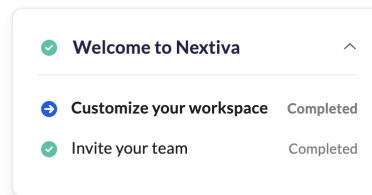
The screenshot displays the Nextiva onboarding interface. At the top, there's a navigation bar with 'Onboarding' and 'Dashboard' tabs, a 'CX Workspace' dropdown, and 'Edit Workspace' and 'Add Workspace' buttons. A progress bar indicates 'Onboarding progress' at 40%. The left sidebar contains a list of onboarding steps: 'Welcome to Nextiva' (completed), 'Customize your workspace' (completed), 'My team' (completed), 'Social channels', 'Online Reviews', 'Messaging Apps', 'Live chat', and 'Bot Builder'. The main content area is titled 'Customize your workspace' with the instruction 'Consolidate all of your communications into a single easily managed location.' It features a 'Name your workspace' section with a text input field containing 'CX Workspace' and a note: 'This is your default workspace name, you can change it now or customize it later.' Below this, there are two columns of information: 'What is a workspace?' with bullet points explaining workspaces, and 'Some common use cases are:' with a list of scenarios. A blue 'NEXT' button is located at the bottom right of the main content area.

XBert Tip: **Next** must be selected to save your progress!

Welcome to Nextiva Widget

As an Account Owner or Admin, the "Welcome to Nextiva" widget is your starting point in NextivaCX. It's designed to help you:

- **Personalize your workspace:** Tailor your NextivaCX experience to match your preferences and workflow.
- **Invite your team:** Easily add new users and assign them appropriate roles.
- **Access helpful resources:** Find user guides and other helpful information to get the most out of NextivaCX.



Workspaces

A workspace is a dedicated environment in NextivaCX that Account Owners and Admins can create to consolidate specific workstreams. An account can have multiple Workspaces. Within a Workspace, the Account Owner and Admins are able to connect social channels, review channels, messaging apps, emails, create a live chat, and build chatbots. Admins and Members are assigned specific Workspaces to access.

Workspaces are used to help filter the incoming interactions in the Unibox. Since all interactions from all connected channels enter the Unibox, having different Workspaces help manage which interactions are displayed at one time.

Workspaces are commonly used in the following locations:

- **Multiple locations or multiple businesses-** For example, a business could use one Workspace to connect channels dedicated to their Phoenix location and another Workspace for their Boston location. The business could then assign specific members to the Phoenix Workspace and others to the Boston Workspace, ensuring dedicated employees are available to respond to each location.
- **To monitor competitors-** In NextivaCX, competitor's public social sites can be monitored to collect analytics about their customer engagement and brand management. To keep the competitor's data separate, a workspace can be created to consolidate information about one competitor. This can help our customer easily monitor and run reports to stay on top of information and trends of the competitor.
- **To create dedicated work streams for a specific group or team of Users-** For example, a business may create one Workspace and connect their support focused channels while creating a second Workspace for their sales focused channels. This would provide the business the ability to invite all support employees to one workspace and all sales employees to the other, reducing the incoming interactions they see and helping the teams prioritize their work.

Access Your Workspace

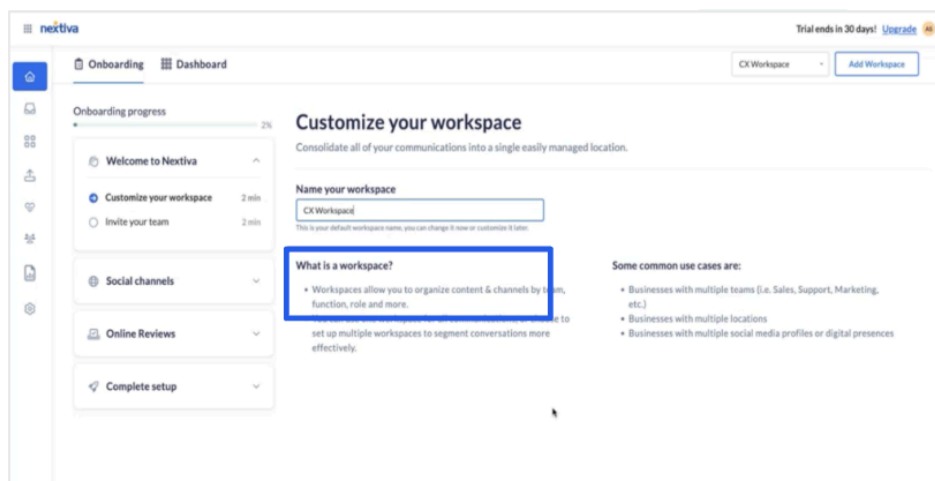
1. Select the **Home Icon**.
2. Select the **Onboarding Tab**.

Customize Your Workspace

The "Welcome to Nextiva" widget gives you the opportunity to name your first workspace. This initial workspace is automatically created when the first person logs into the account.

By default, a new workspace is named CX Workspace. On the main dashboard page of the workspace, you can change the name of the workspace by following the steps below:

1. Click into the field under **Name your workspace**.
2. Remove the default name of **CX Workspace**.

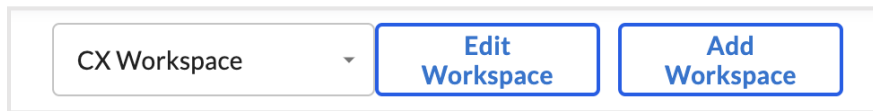


3. Type in a custom name for the workspace.
4. Select **Next** in the bottom right corner of the screen to continue the setup.
5. A popup will appear stating that the workplace name has been changed.

XBert Tips:

- Workspace names must be more than 4 characters and less than 76 characters.
- In NextivaCX, you'll only see the workspaces you've been granted access to. When you log in or refresh your page, the first workspace in alphabetical order will be displayed by default. This ensures that you only see the information and channels relevant to your role and responsibilities within the organization.

Creating a Workspace



As the Account Owner or an Admin, you have the flexibility to create additional workspaces as needed. This is particularly useful if you have multiple businesses or locations that require separate channel connections and management.

1. Select the **Add Workspace** button in the top right corner of the page.
2. A popup will appear with channels to select. Select the channels that you want to be included in the workspace. These channels can be edited at a later time.
3. Select **Next** when complete.
4. Name the workspace to differentiate this space from other Workspaces.
5. Ensure the correct channels have been added on the left side of the page.

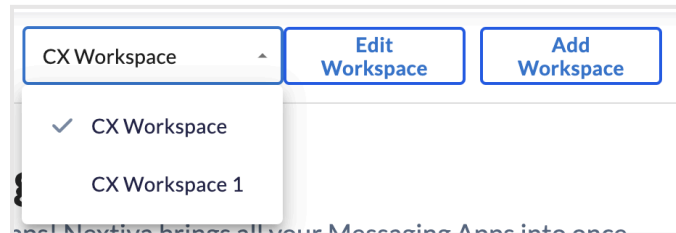
Editing a Workspace

Editing a workspace is used to add additional channels to a Workspace. To edit an existing workspace, follow the steps below.

1. Make sure you are in the workspace that you need to edit.
2. Select **Edit Workspace**.

Toggling Between Workspaces

1. Select the dropdown with names of the Workspaces in the top right corner of the page.
2. Select the name of the workspace from the drop down menu to toggle between workspaces.

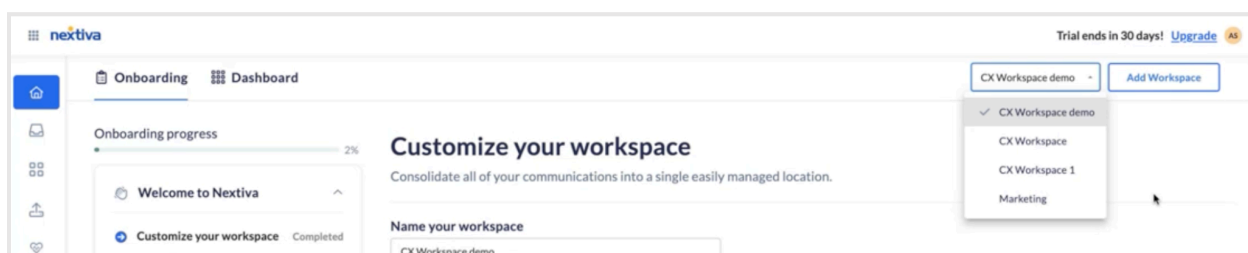


XBert Tip: Interactions from all Workspaces you have access to will be captured in the same Unibox.

My Team

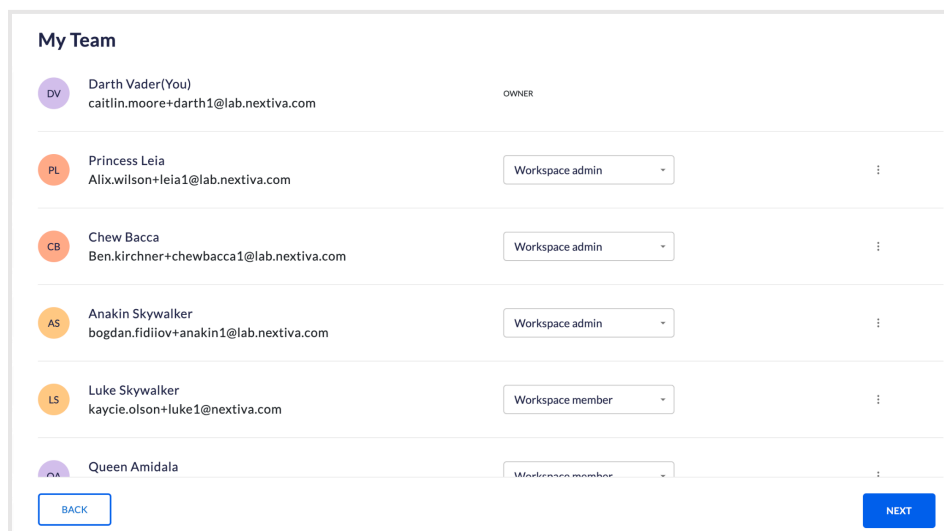
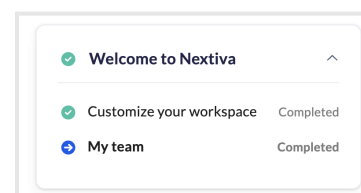
The My Team section in the Welcome to Nextiva widget displays all Users with access to the Workspace you are setting up. Here, you can see the User name, email and User role.

To confirm the Workspace you are setting up, view the name in the dropdown of Workspaces.



Navigate to My Team

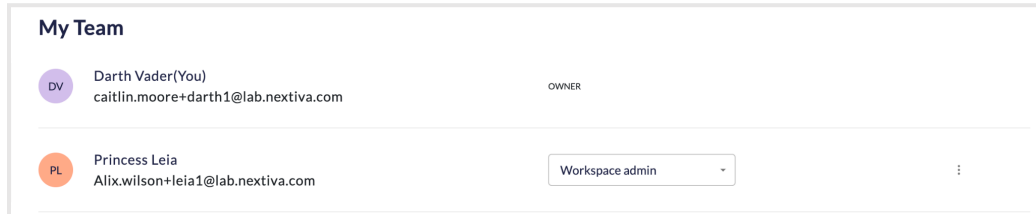
1. Select the **Welcome to Nextiva Widget**.
2. Select **My Team**.
3. All Users with access to the Workspace will appear, along with their email and role.



Change the Role of a User

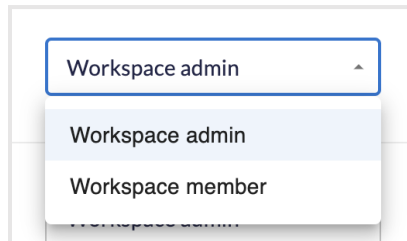
You are able to change the role of a User in NextivaCX. If the User's role is changed in NextivaCX, it will not automatically change in the NextOS Admin Portal. Changing the setting here only changes the role level in NextivaCX and will change their role throughout the NextivaCX platform, not just per Workspace.

1. To change the Role, select the dropdown box with the role.



2. Select the new role from the dropdown.
 - a. Admin's can create Workspaces, connect channels and change settings.
 - b. Members are able to access the Unibox and respond to interactions from Workspaces they have access to.

XBert Tip: In NextOS, members are referred to as Users. Users and members have the same meaning in this context.

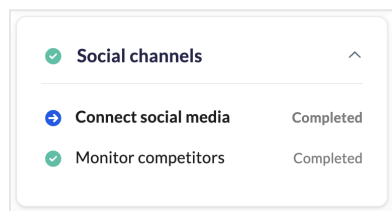


3. Once selected, the role will automatically change.

Social Channels Widget

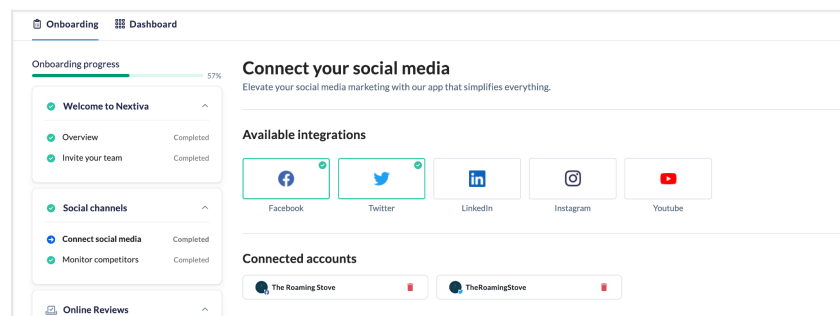
The Social Channels widget makes it easy to link your social media accounts to NextivaCX. This lets you engage with customers, monitor brand mentions, and track conversations – all within a single platform.

- Only Account Owners and Admins can connect social channels.
- You'll need the login credentials for the social media accounts you want to connect.
- The accounts must be business accounts, not personal accounts.



Connect Your Social Channels

1. On the Onboarding tab, locate the **Social Channels** widget.
2. Click the **Connect Social Media** button.
3. Choose the social media platform you'd like to connect (e.g., Facebook, X, Instagram).
4. A popup window will appear, asking for your login information for that platform. Follow the prompts to complete the connection.
5. NextivaCX will securely store your login details, and the connected account will appear under the "Connected Accounts" section.



Monitor Competitors

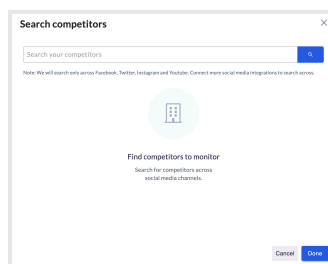
With NextivaCX, you can stay ahead of the game by monitoring your competitors' social media activity on public platforms. Gain valuable insights to:

- **Identify potential threats:** Spot emerging trends or negative sentiment that could impact your business.
- **Uncover opportunities:** Find gaps in your competitors' social media strategy that you can leverage to your advantage.
- **Benchmark your performance:** Compare your social media results against your competitors to measure your success and identify areas for improvement.

XBert Tip: Before you start monitoring competitors, make sure you've connected your own relevant business social media channels through the Social Channels widget. For example, to monitor a competitor's Facebook page, you'll need to have already connected your own business Facebook account.

Add Competitor Accounts

1. On the Onboarding tab, locate the **Social Channels** widget.
2. Click the **Monitor Competitors** button.
3. Select **Add more competitors**.
4. Search for your competitor across Facebook, Instagram, X (formerly Twitter), and YouTube.
5. When the competitor's profile appears, click on the hyperlink.
6. Select **Done**.



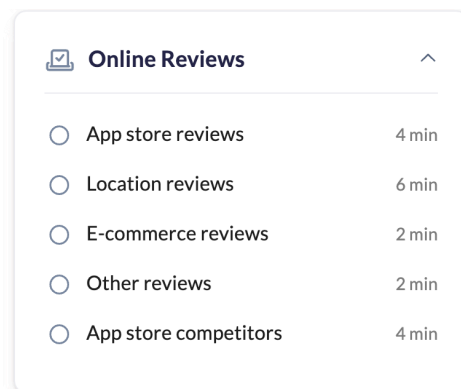
Online Reviews Widget

The Online Reviews widget in NextivaCX allows you to monitor and respond to customer reviews across a wide range of platforms, helping you protect and enhance your brand's online reputation.

Review Platforms

We've organized the review platforms into five categories for easy navigation:

- **App Store Reviews:** Monitor reviews for your apps on platforms like the Apple App Store and Google Play Store.
- **Location Reviews:** Track and respond to reviews on location-based platforms like Yelp, Google Business Profile, Zomato, and Tripadvisor.
- **E-Commerce Reviews:** Stay on top of customer feedback about your products on major e-commerce sites like Amazon and Flipkart.
- **Other Reviews:** Manage reviews on other important platforms like Glassdoor (for employer reviews) and Indeed (for company reviews).
- **App Store Competitors:** Keep an eye on your app competitors' reviews on the Google Play Store.



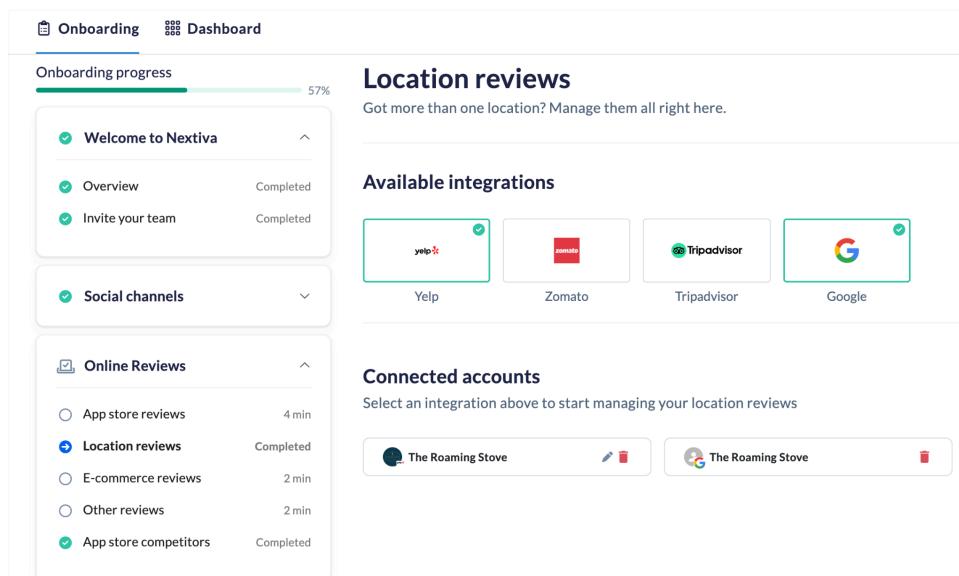
Benefits of Managing Online Reviews

- **Build trust and credibility:** Show potential customers that you value their feedback and are committed to providing a positive experience.
- **Improve your online visibility:** Positive reviews can boost your search engine rankings and attract more customers.
- **Address customer concerns:** Respond to negative reviews promptly and professionally to resolve issues and show that you care.

Connecting Review Channels

To connect a Review Channel, follow the directions below.

1. Select the Online Reviews widget from the Onboarding menu on the left side.
2. Select the review category to connect.
3. Select the tile and log into each review channel that needs to be integrated. When logging in, make sure to provide all credential information that is being requested by the platform.
4. Connected channels will be displayed below the Connected Accounts section in the platform.



5. Select the **Next** button. This will bring the Account Owner or Admin to the next line in the list.

Messaging Apps Widget

Bring all your messaging conversations into one place! By connecting your messaging apps to NextivaCX, you can manage and respond to messages from various social media platforms directly within the platform.

Connect Your Messaging Apps

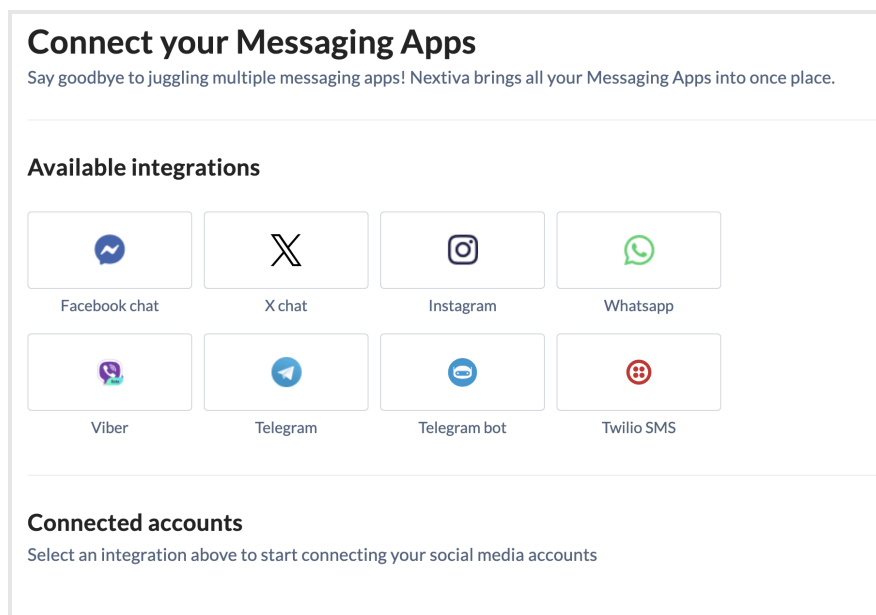
1. On the Onboarding tab, locate the **Messaging Apps** widget.



2. Select the messaging app you want to connect (e.g., Facebook Messenger, WhatsApp).
3. Log in using your credentials.

XBert Tip: Some messaging apps, like WhatsApp, may require additional verification steps or information beyond just a username and password.

Once connected, your messaging apps will remain securely logged in, and you'll be able to send and receive messages from these apps right within the NextivaCX [Unibox](#).



Live Chat Widget

The Live Chat widget empowers you to create a customized chat experience that you can seamlessly embed into your website. Engage with your visitors in real-time, answer questions, and provide instant support – all without leaving NextivaCX.

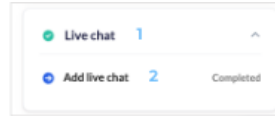
Customize Your Live Chat

The Live Chat widget offers a range of customization options to match your brand and website:

- **Branding:** Change the brand name, logo, theme, and font to create a cohesive look and feel.
- **Preview:** See a live preview of your chat widget on the right side of the screen as you make changes.
- **Publish and Implement:**
 - **Publish** the code directly from the widget to enable it for use.
 - **Copy** the code to paste it into your website's HTML.
 - **Send** the code to your web developer if you're not comfortable making the changes yourself.
- **Advanced Options:** Explore additional customization options for a truly tailored chat experience.

Get Started

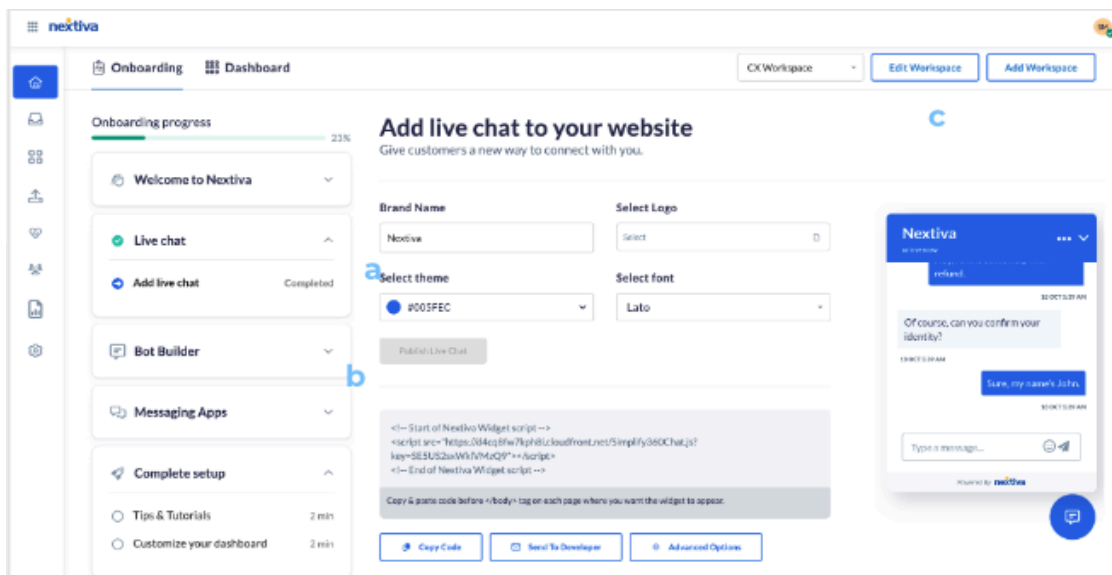
1. On the Onboarding tab, locate the **Live Chat** widget.
2. Select the **Add Live Chat** button.



3. Select **Next** to Save your progress.

In the Live Chat section, the Account Owner and Admins will be able to:

- a. Adjust settings to customize the Live Chat
- b. Publish Live Chat
- c. Preview the Live Chat with the customized settings
- d. Access Advanced Settings.



Xbert Tip:

Need more help?

Check out the detailed instructions in the [Live Chat](#) section of our job aids.

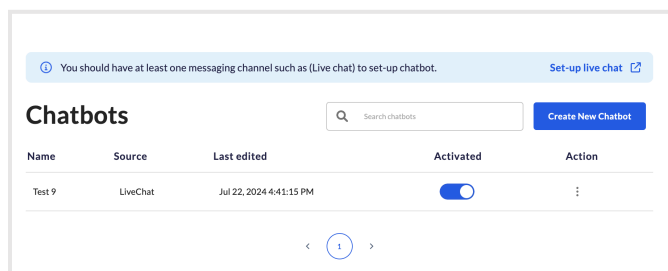
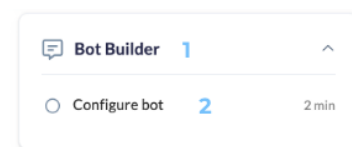
Bot Builder Widget

The Bot Builder widget empowers you to create custom chatbots that can interact with your website visitors, answer common questions, and even qualify leads – all before handing off the conversation to a live agent.

XBert Tip: The Bot Builder widget is exclusively available in our Engage and Power Suite packages. If you're on the Digital or Core package, this feature is visible in your NextivaCX account but usage is an additional cost. If you'd like to upgrade to include chatbot, reach out to Sales or your Project Manager today!

Get Started

1. On the Onboarding tab, locate the **Bot Builder** widget.
2. Click the **Configure Bot** button.
3. You'll be taken to the Chatbot home page, where you can view any previously created chatbots.
4. To create a new chatbot, click the **Create New Chatbot** button.



Editing an Existing Chatbot

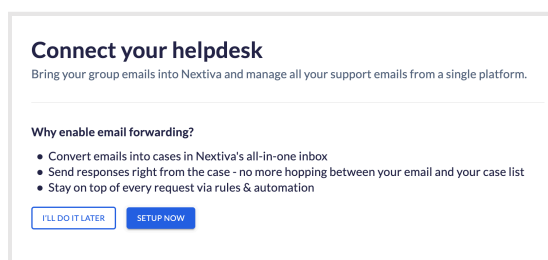
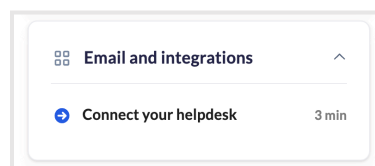
1. To edit an existing chatbot, find the chatbot you want to modify on the Chatbot home page.
2. Select the **three dots** under the Action column next to the chatbot.
3. Select **Edit**.
4. Select **Next** to save your progress as you build your chatbot.

Email & Integrations Widget

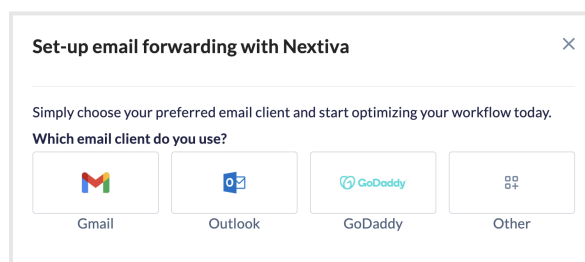
The Email & Integrations widget allows you to connect your email to NextivaCX, streamlining your customer support and ensuring you never miss an important message. We use email forwarding to bring your emails directly into the NextivaCX Unibox, where you can manage and respond to them efficiently.

Connect an Email Account

5. On the Onboarding tab, locate the **Email & Integrations** widget.
6. Select the **Connect Your Helpdesk** button.
7. A popup will appear. Select the **Setup Now** button.



Select your **email provider** from the list of available options.



8. **Enter the email address** you want to **forward** to NextivaCX.
9. Select **Next**.
10. Follow the additional instructions provided, which will guide you through setting up email forwarding within **your specific email platform**. [Click Here for directions on how to from Gmail.](#)

Gmail Steps

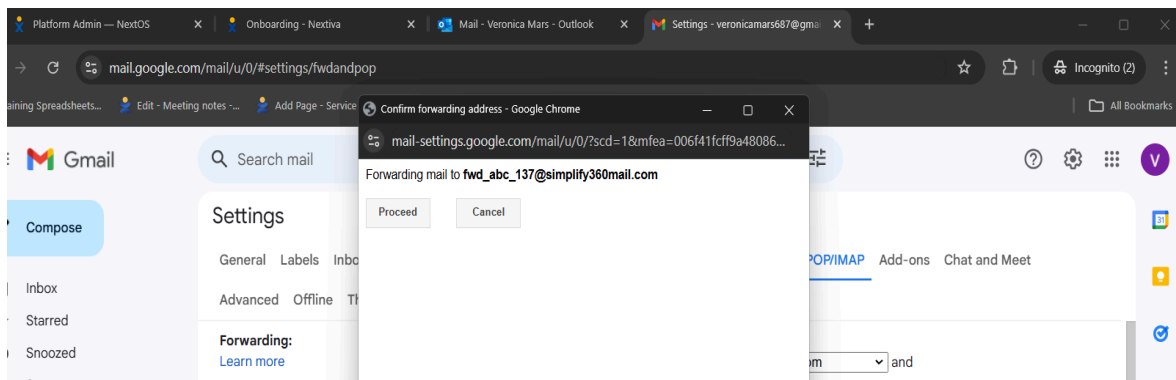
11. You will need to set up email forwarding through your Gmail account. Once you enter the email from Nextiva CX, you will see the image below.

Add a forwarding address

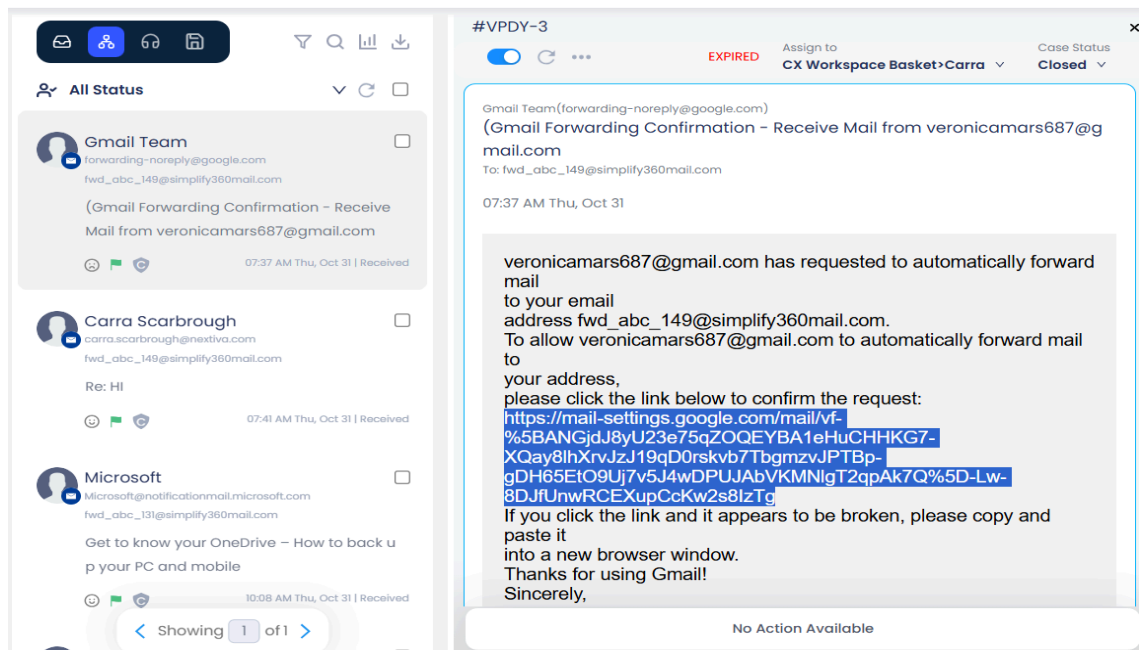
A confirmation link has been sent to fwd_abc_128@simplify360mail.com to verify permission.

OK

12. Confirmation email will be sent to the forwarding address you entered into your GMAIL. Select **Proceed**.



13. Once you receive the email you will need to **highlight the website link and copy it into the URL and go**.





Confirmation

Please confirm forwarding mail of veronicamars687@gmail.com to **fwd_abc_149@simplify360mail.com**.

Confirm

©2024 Google - [Gmail Home](#) - [Privacy Policy](#) - [Program Policies](#) - [Terms of Use](#) - [Google](#)

14. After confirming your email address, please return to the settings and select the option to forward emails to the new NextivaCX email. Once you have done this, you will be all set to receive emails within NextivaCX unibox for GMAIL.

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e

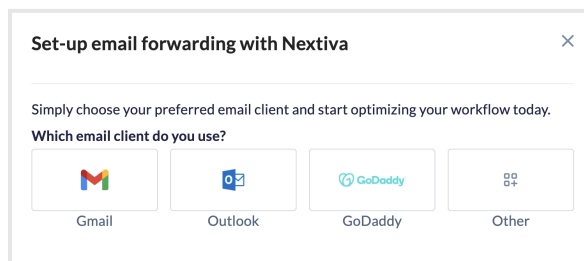
- ☐ Disable forwarding
- ☒ Forward a copy of incoming mail to fwd_abc_130@simplify360mail.com (in use) and keep Gmail's copy in the Inbox

Add a forwarding address

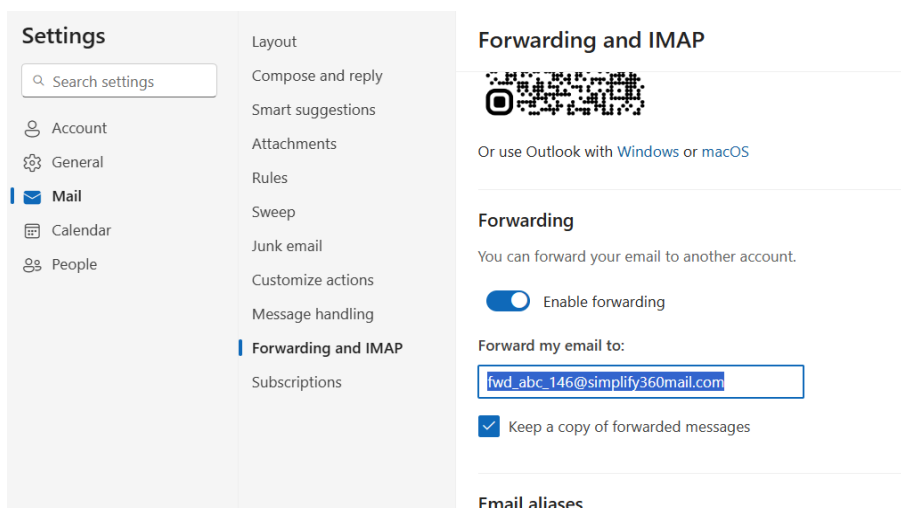
Tip: You can also forward only some of your mail by [creating a filter!](#)

Outlook Steps:

1. Select your **email provider** from the list of available options.



2. **Enter the email address** you want to **forward** to NextivaCX.
3. Select **Next**.
4. Follow the additional instructions provided, which will guide you through setting up email forwarding within **your specific email platform**. [Click Here for directions from OUTLOOK.](#)
5. In your Outlook settings, look for the section labeled **"Forwarding and IMAP."** Here, you should **enter** the email address provided to you by NextivaCX.



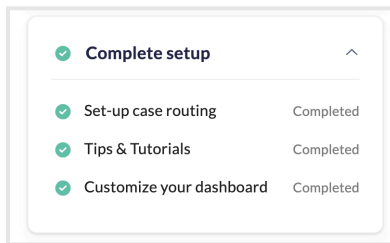
6. After entering your email address, please remember to click **"Save"** in the bottom right corner. Once you have saved the changes, you will begin **receiving emails without needing to confirm your email address**.

XBert Tip: Only Account Owners and Admins can connect email accounts. Once the connection is complete, your connected email address will be displayed in NextivaCX.

Complete Setup Widget

The Complete Setup widget is your final step in getting NextivaCX up and running. It helps you finalize your account configuration and provides some valuable tips and tricks for using the platform effectively.

1. To complete the setup, select the Complete Setup widget.
2. Select Set Up Case Routing to confirm your channels are going to the Unibox.
3. Select Tips and Tutorials to access videos that will aid the User in using Nextiva Chat.
4. Select Customize your Dashboard to customize the dashboard.



Set Up Case Routing

Case routing ensures that incoming interactions from your connected channels are automatically organized and assigned within the Unibox, streamlining your team's workflow.

1. On the Onboarding tab, locate the **Complete Setup** widget.
2. Select the **Set Up Case Routing** button.
3. For each connected channel category, you'll see a list of routing options.
4. Toggle the options on or off to specify which interactions should create new cases in the Unibox.
5. Select **Next** to save your settings.

Set-up case routing
Create rules and manage your cases for your team to enhance team productivity.

Routing templates
Create cases from incoming messages and route to the right team

Create social cases
All social media messages will be created as cases [Edit](#) ☒

Create cases for live chat
All live chat request will be created as cases [Edit](#) ☒

OR

Create cases for all communications
All incoming communications will be created as cases [Edit](#) ☐

XBert Tips:

- Only Account Owners and Admins can set up case routing.
- Case routing can be further customized using the Organizer feature.

Tips & Tutorials Section

The Tips and Tutorials section is your go-to resource for learning more about NextivaCX and discovering how to maximize its potential. Watch informative videos on specific topics and gain valuable insights to enhance your customer experience strategy.

Our video library covers a range of topics, including:

- Setting up and managing your NextivaCX account
- Connecting and managing your digital channels
- Utilizing key features like the Unibox and case routing
- Optimizing your Chatbot (if available in your package)
- Analyzing customer interactions and generating reports

Select the **Tips and Tutorials** widget on the Onboarding tab to start exploring our video library.

Tips & Tutorials

Click to watch helpful tutorials on how to best use our products & services.



Publishing & Scheduling

Create posts & build your content calendar



Unibox

Never miss a message, reply or comment with the Unibox



Review Management

Analyze & respond to all of your digital reviews seamlessly



Dashboards

Marketing Performance, Competitor Analysis, Team Management & more

Stay Up-to-Date

We're constantly adding new videos, tutorials, and webinars to help you get the most out of NextivaCX, so be sure to check back often!

Customize Your Dashboard



The Dashboard is your personalized command center within NextivaCX. It's where you'll land after your initial login, providing a snapshot of the key metrics and insights that matter most to you.

The Complete Setup widget gives you the power to tailor your dashboard to your specific needs.

1. On the Onboarding tab, locate the **Complete Setup** widget.
2. Select the **Customize Your Dashboard** button.
3. Choose the specific data and visualizations you want to see on your Dashboard from the available options.

You must select at least one dashboard item from each of the two sections to proceed.

Customize your dashboard
Create a focused view of what's most important to you.

What performance trends are most important to you? (At least one up to two)

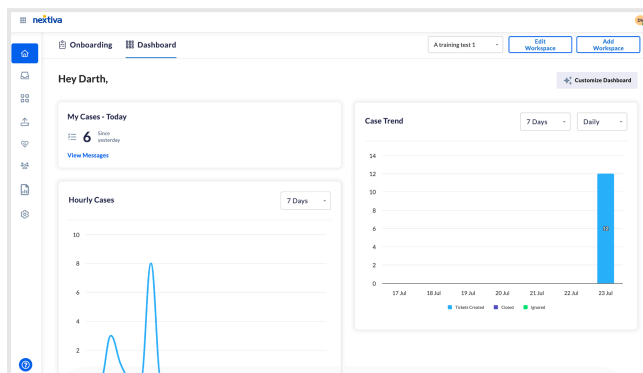
Case Trend Case Trend ✓ Selected	Overall Channel-wise Overall Channel-wise + Select	Response Time Response Time + Select
Hourly Cases Hourly Cases ✓ Selected	Conversation Rate Conversation Rate + Select	

What are the most important things to your business? (At least one up to six)

Reviews - Last 24 hours Total reviews received in last 24 hours + Select	SLA & Follow up - Last 7 days Total SLA & Follow up in last 7 days + Select	SLA & Follow up - Last 24 hours Total SLA & Follow up in last 24 hours + Select
---	--	--

BACK FINISH SETUP

4. Once you've made your selections, select **Finish Setup**. You'll be redirected to your newly customized Dashboard on the Home Page, ready to provide you with valuable insights at a glance.



XBert Tip: The Dashboard Tab can be customized in the future by navigating to the Dashboard Tab and selecting Customize Dashboard from the button on the top right of the screen.

Additional Account Setup

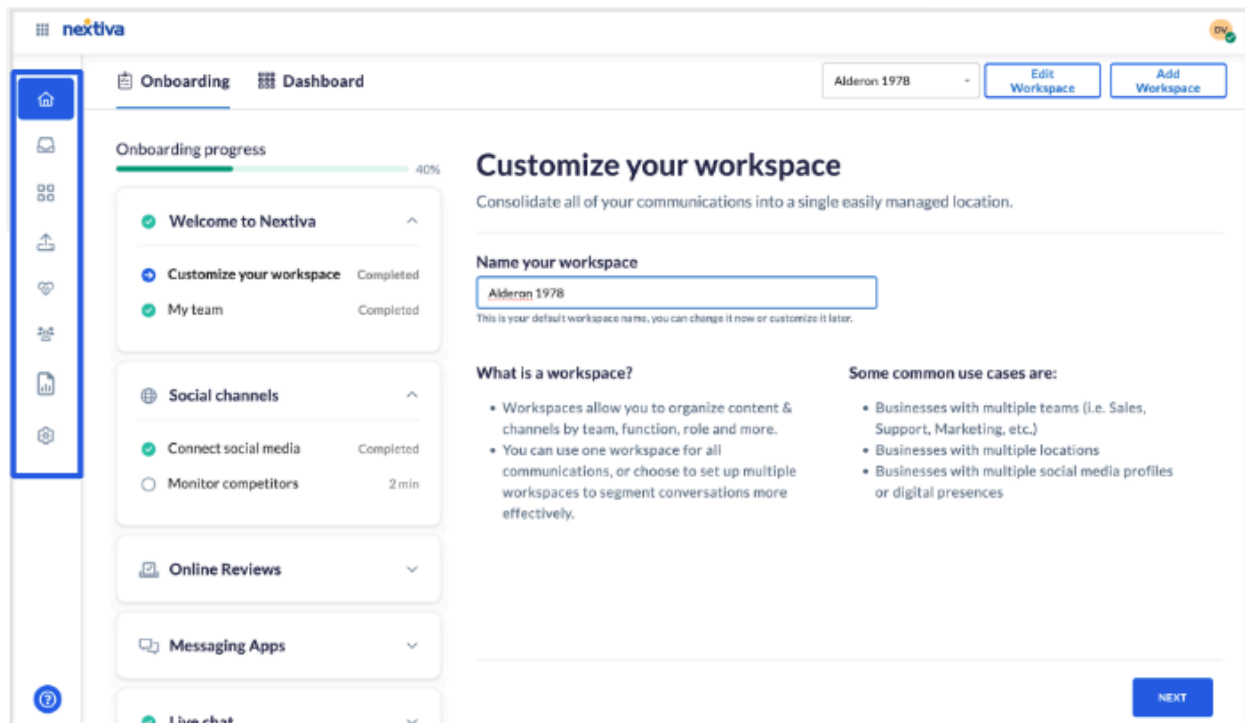
Once the initial setup has been completed, it is time to familiarize yourself with the platform and complete a few additional tasks for setup. The Account Owner and Admins on the account can continue to go back to the Onboarding tab and adjust previously configured settings and connect additional channels.

Select the links below to finish setting up your account and to learn more about the platform.

[Inviting Users](#)

[Navigating the Toolbar Overview](#)

The icons on the left side of the page control different features. The features of the CX portal can be set up by selecting the different icons



Inviting Your Team to NextivaCX

Once you've set up your workspace, it's time to bring your team on board! The process for inviting team members varies slightly depending on your Nextiva package.

Role Types

Choose the right role for each team member based on their responsibilities and the level of access they need within NextivaCX.

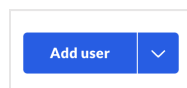
5. **Admin:** Admins have full access to connect channels, manage settings, and view all interactions within the Unibox.
6. **User:** Users have access to the Dashboard tab and specific filtered views within the Unibox, allowing them to focus on their assigned tasks.

Xbert Tip: If you have a Nextiva Voice + Chat account, adding users through NextivaCX will only grant them a Chat license, not a Voice license. *Use NextOS (on the following page) instead.*

From NextOS

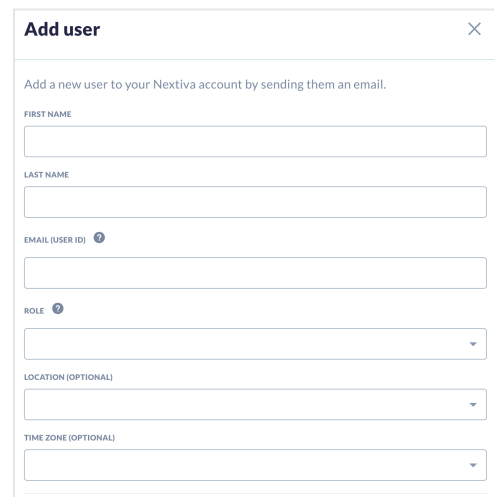
Team members are managed within the NextOS platform. You can create, edit, and remove team members directly from NextOS.

1. Select your **initials** in the top right corner of the screen.
2. Choose **Administration** from the dropdown menu.
3. You'll be redirected to the NextOS platform.
4. Select **Users** from the left side of the screen.
5. Select **Add User**. Each team member needs a **license** for NextivaCX.

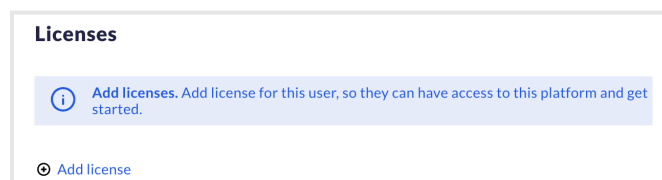


6. Fill out the required information for the new team member.

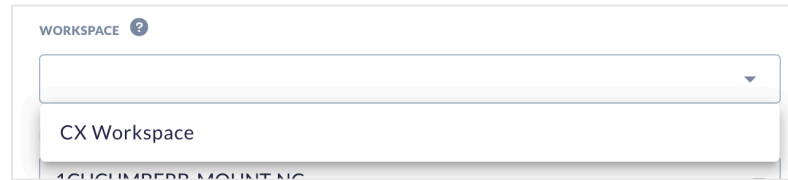
- a. First Name
- b. Last Name
- c. Email of the team member
- d. Assign the appropriate **role** (Admin or User) to the new team member.
- e. Location the team member is associated with
- f. Time zone of team member.

A form titled "Add user" with a close button (X) in the top right corner. Below the title is a subtitle: "Add a new user to your Nextiva account by sending them an email." The form contains several input fields: "FIRST NAME", "LAST NAME", "EMAIL (USER ID)" (with a question mark icon), "ROLE" (with a question mark icon and a dropdown arrow), "LOCATION (OPTIONAL)" (with a dropdown arrow), and "TIME ZONE (OPTIONAL)" (with a dropdown arrow).

7. Select **Add License** to select the available license from the drop down menu. Only available licenses will be displayed in the drop down.



8. Navigate to the **Workspace** section and select the Workspace(s) that the team member should access.

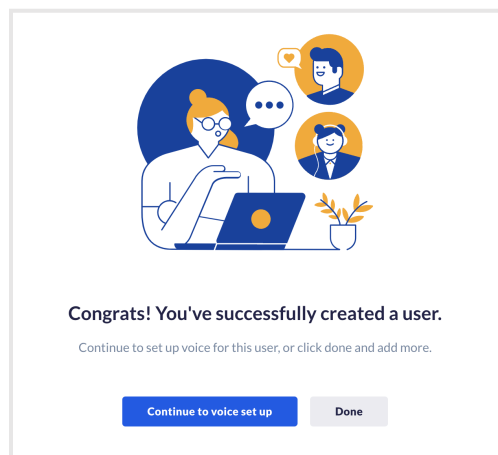


Xbert Tips:

- A workspace must be added in order for the team member to be created. Multiple Workspaces can be selected.
- All Workspaces that the Admin/User should be able to access need to be selected in order for the team member to access interactions connected to that location.

9. Select **Create**.

10. You will then be prompted to setup the team members voice settings if the User has a license that includes voice options.

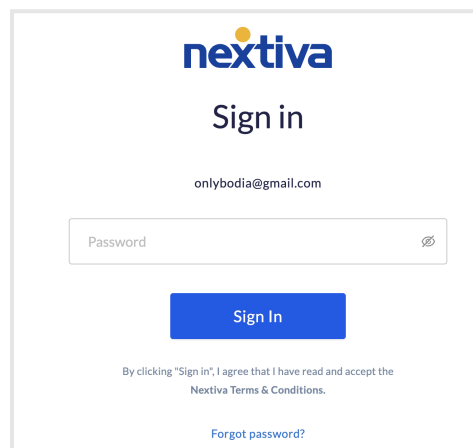


Your Team Members' First Steps

Once you've invited a team member to NextivaCX, they'll receive an email with a link to log in and get started.



1. **Click the Link:** They should select the **Website hyperlink** in the email.
2. **Enter Username:** This will take them to the NextivaCX login page. They should enter the **Username** provided in the email into the email address field.
3. **Select Next:** Click the **Next** button to proceed.
4. Since this is their first login, they'll need to select **Forgot Password** to set up a new password.



5. An email will be sent to the address they provided, containing instructions on how to reset their password. They should select the **click here** hyperlink in that email to complete the process.

Here are the login details of your Nextiva account.

Please [click here](#) to reset your Nextiva account password.

If you have any queries regarding your account, please feel free to contact us.

6. Once they've reset their password, your team member is ready to log in and start exploring NextivaCX.

XBert Tips:

- The initial password provided in the invitation email is temporary. It's important for new users to reset their password upon their first login.
- If they encounter any issues during the login or password reset process, they can reach out to your Account Owner or Admin for assistance, or contact our support team.

Navigation Toolbar Overview

Each icon on the left side of the screen navigates you to a specific function.



Home: this icon directs you to the home page, housing either the Onboarding Tab or Dashboard Tab.



Unibox: this icon directs you to the main page used to monitor incoming information for all profiles.



Dashboard: this icon directs you to the dashboard homepage. Here, you can select which dashboard you would like to monitor.



Publish: this icon is used when you want to publish information to a specific channel and profile.



Survey: this icon is used when you want to create and manage surveys to send to your customers.



Audience: this icon directs you to your contacts page.



Report: this icon directs you to the home page containing all reports on information collected through CX



Settings: this icon directs you to the settings.

Home



In the Home Icon, the Onboarding Tab and Dashboard Tab appear.

 **Onboarding**

Onboarding Tab

The onboarding tab is there to help instruct Account Owners and Admins on how to set up their account and update Users on the progress of the onboarding process. Refer to the [Account Setup Overview](#) section for more details.

 **Dashboard**

Dashboard Tab

In the Dashboard tab, you can customize the information you see when first logging in. The dashboard can be customized to the Account Owners and Admins specifications. To customize the dashboard, follow the steps below. There is an opportunity to customize this tab during the onboarding process and the tab will reflect the customization.

1. Select the Dashboard Tab.
2. Select **Set Up Now**.
3. Select from different prompts to customize your dashboard.
4. Once the important items have been selected, select the **Finish Setup** button.

Customize your dashboard

Create a focused view of what's most important to you.

What performance trends are most important to you? (At least one up to two)

**Case Trend**
Case Trend
[+ Select](#)

**Overall Channel-wise**
Overall Channel-wise
[+ Select](#)

**Response Time**
Response Time
[+ Select](#)

**Hourly Cases**
Hourly Cases
[+ Select](#)

**Conversation Rate**
Conversation Rate
[+ Select](#)

What are the most important things to your business? (At least one up to six)

**Reviews - Last 24 hours**
Total reviews recieved in last 24 hours
[+ Select](#)

**SLA & Follow up - Last 7 days**
Total SLA & Follow up in last 7 days
[+ Select](#)

**SLA & Follow up - Last 24 hours**
Total SLA & Follow up in last 24 hours
[+ Select](#)

Unibox

The Unibox is your one-stop shop for managing all your customer interactions. It's where you'll see and respond to live conversations, track open tickets, and take action on messages from all your connected channels, including social media, email, chat, e-commerce reviews, blogs, news sites, and more.

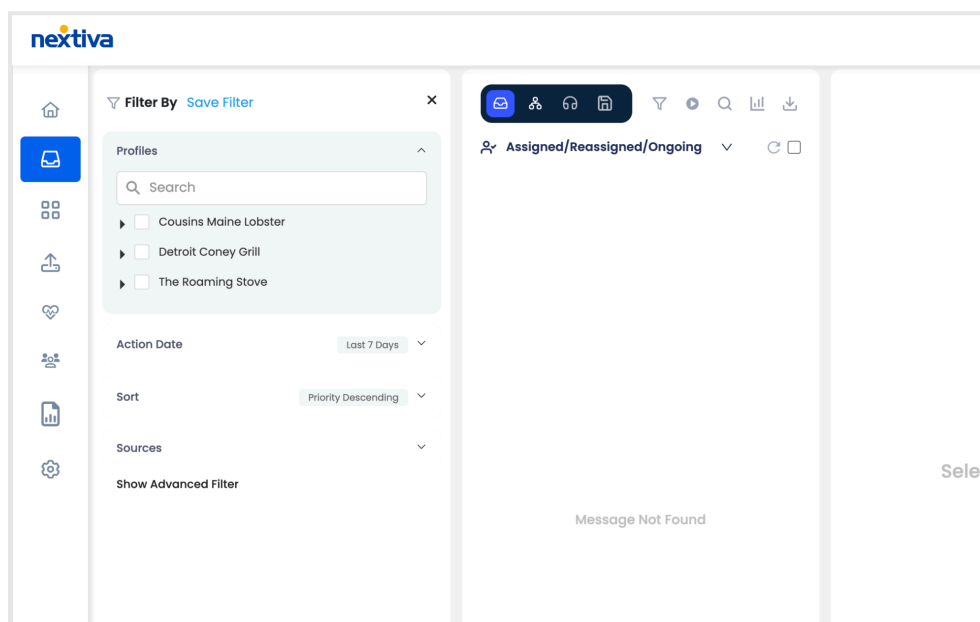
All Your Conversations, One Place

No matter which channel your customers use to reach out, their messages will flow directly into the Unibox. This gives you a complete overview of all your customer interactions, making it easy to stay organized and provide timely responses.

Access the Unibox

Simply navigate to the Unibox section within NextivaCX to start managing your conversations.

For detailed information on how to use the Unibox effectively, check out the [Unibox](#) section of our job aids.



Xbert Tip: The Unibox is a powerful tool for streamlining your customer communication. Take some time to explore its features and see how it can improve your workflow.

Dashboard



The Dashboard Icon directs you to all pre-constructed dashboards. These dashboards allow you to visualize your social channels, and monitor things such as assigned cases, how your audience is spread across different social media channels and more.

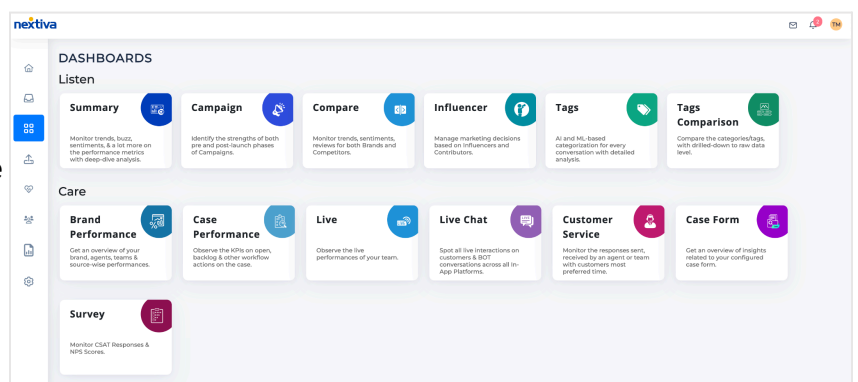
The dashboards are grouped into different categories:

Listen- Under the listen section, we have a list of dashboards that provide a variety of details on total conversation and impressions. You can also get analytical insights on customer sentiment, and influencer tracking and derive tag-based insights.

Care- The seven care dashboards provide insights into overall ticket performance, case statistics, live dashboard metrics, live chat analytics, and customer service trends. These dashboards offer a comprehensive overview of customer support operations, enabling analysis of ticket volume, agent performance, response times, and customer interactions across various channels.

Insights- The dashboards under Insights focus on offering analytics for Facebook, X, Instagram, LinkedIn, and overall brand and competitor performance. It covers post details, overall performance metrics, audience demographics, and engagement rates, along with competition and industry-level insights, providing a comprehensive overview of social media activity and its impact.

Reviews- The dashboards under Reviews focus on e-commerce and location-based data. It provides insights into cumulative reviews, ratings, sentiment analysis, trends, and geographical distribution of reviews.



To learn more about dashboards, watch this [video](#).

Summary Dashboard

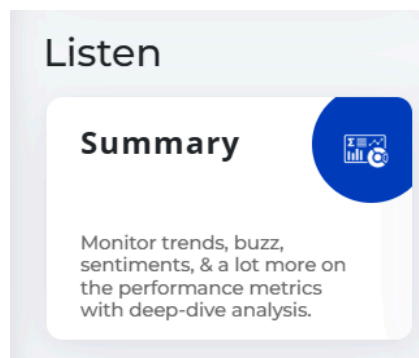
The Summary Dashboard is your go-to tool for quick, high-level insights into your customer interactions. With its focus on date exploration, it allows you to easily track trends and identify key topics over time. It's perfect for daily check-ins, high-level reporting, and identifying areas for further investigation.

Setting up a Summary Dashboard

1. Select **Dashboard** on the left.



2. Go to **Summary**.



3. Select a workspace(s) by **choosing** the **workspace(s)** you want to include in the dashboard.

Workspaces*

4. Select the **channels** you wish to view (e.g., email, chat, social media).

Channels

5. Choose **specific sources** or leave it as All Sources for automatic selection.

Source

All Sources

6. Set the desired **time** range for your analysis.

Date Range

2025-01-15 00:00 TO 2025-01-21 14:01

Today

Yesterday

Last 7 Days

Last Month

Custom Range

<

Jan 2025

>

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4	26	27	28	29	30	31	1
5	6	7	8	9	10	11	2	3	4	5	6	7	8
12	13	14	15	16	17	18	9	10	11	12	13	14	15
19	20	21	22	23	24	25	16	17	18	19	20	21	22
26	27	28	29	30	31	1	23	24	25	26	27	28	1
2	3	4	5	6	7	8	2	3	4	5	6	7	8

12 : 00 AM

>

2025-01-15 00:00 TO 2025-02-15 00:00

Cancel

Apply

Xbert Tip: You have the option to view up to 30 days on your calendar.

7. Click **Apply** to generate the dashboard with your chosen parameters. You can add more filters or refine existing ones as needed.

2025-01-15 00:00 TO 2025-02-15 00:00

Cancel

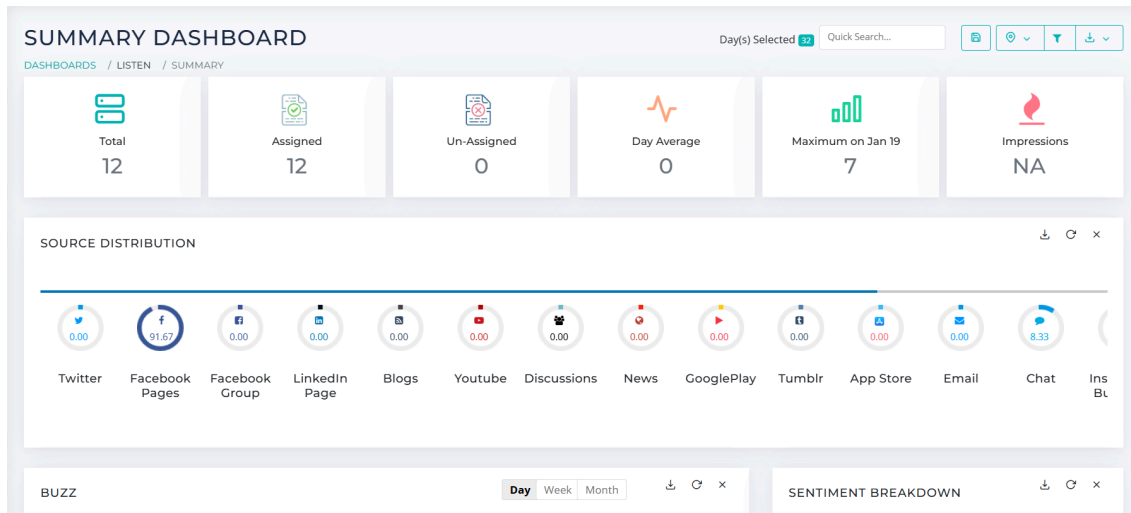
Apply

8. Select **Filter** to make the Summary Dashboard.

Filter

Reset

9. Now you will see your Summary Dashboard Load.



Pin your Dashboard

1. Select **Save** in the top right corner.



2. Provide a clear and **descriptive name** for easy identification.

Pin this Dashboard

ZipItCart

Save date range ☐

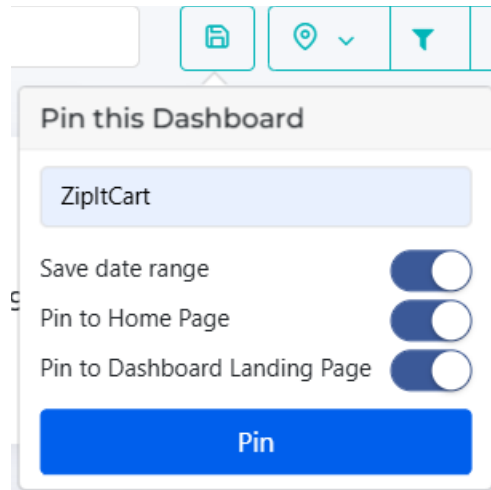
Pin to Home Page ☐

Pin to Dashboard Landing Page ☐

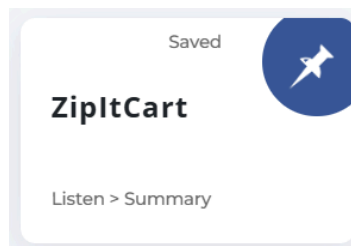
Pin

3. **Configure Settings:**

- Choose whether to save the date range for future use.
- Select if you want to pin the dashboard to your home page.
- Select if you want to pin the dashboard to the dashboard landing page.



4. **Select PIN** to save your dashboard with the chosen settings.

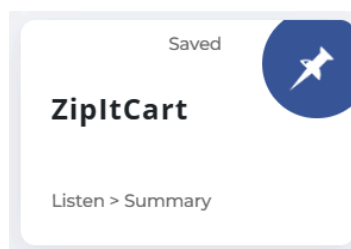


10. Your Summary Dashboard is now created!

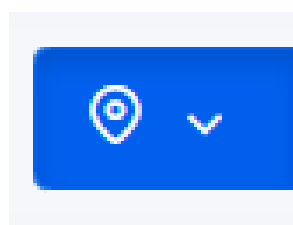
Remove a Dashboard

XBert Tip: Be careful! Unpinning a dashboard is also deleting that dashboard.

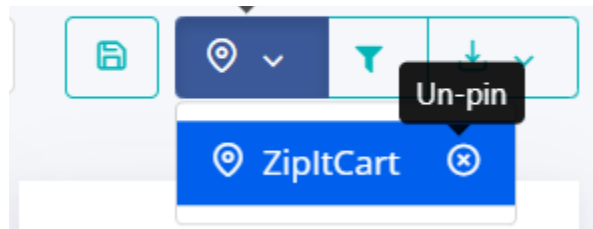
1. Select the **dashboard** you want to remove.



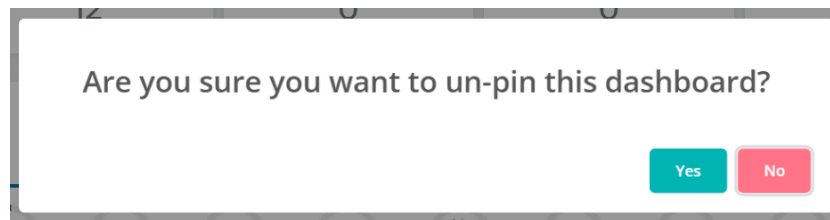
2. Select the **Unpin** button located in the dashboard's settings.



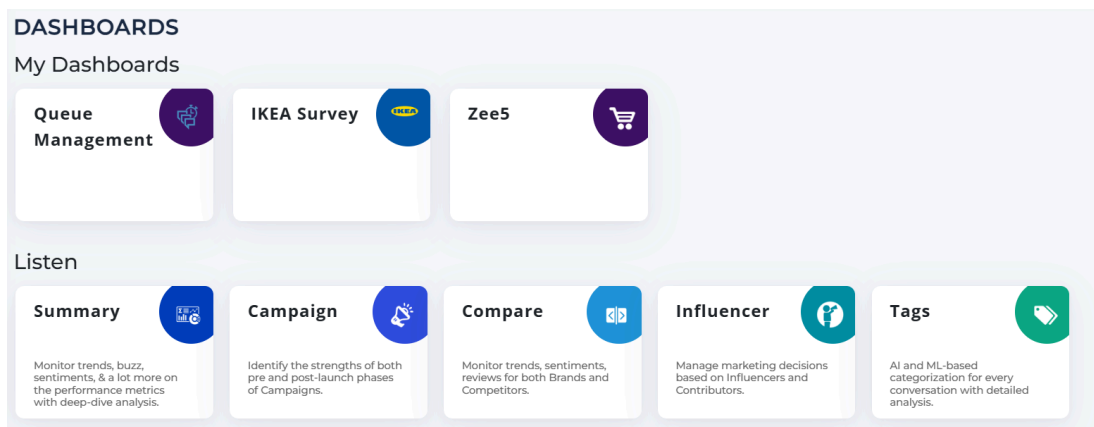
3. Select **X** to un-pin



4. Select **YES** when prompted.



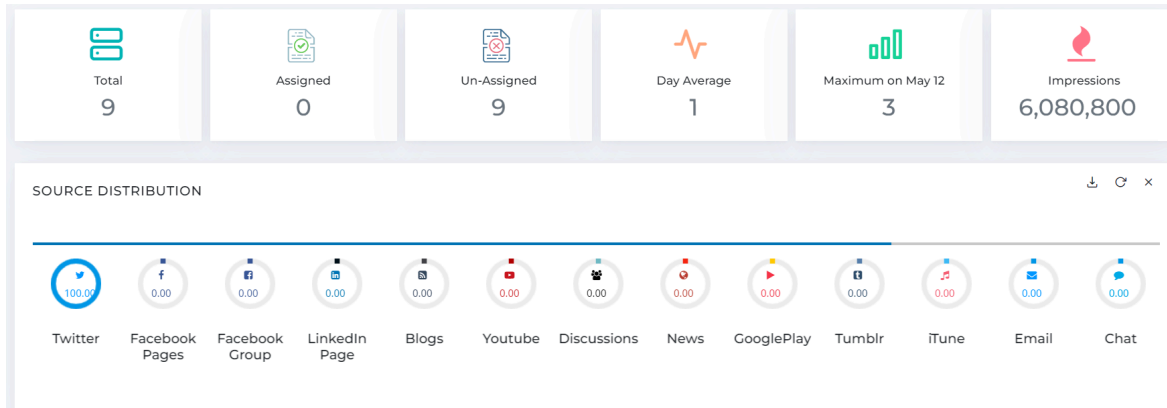
5. You now have successfully removed a Dashboard.



Key Elements

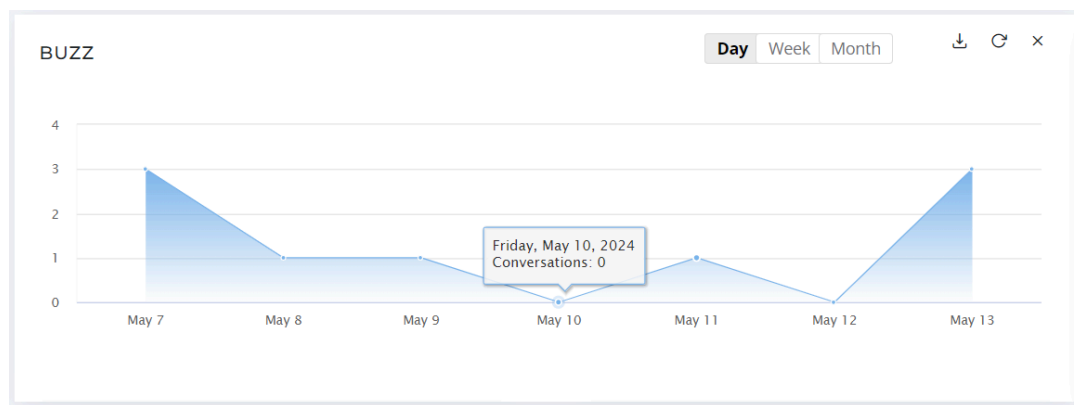
Top Bar

Displays the total number of interactions from your selected workspaces, channels, or sources. This provides a quick snapshot of your overall interaction volume.



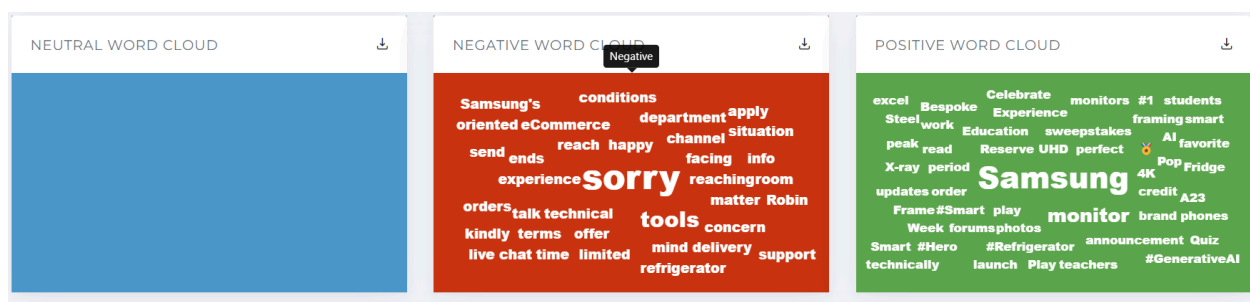
Buzz Graph

Visualizes the "buzz" or total volume of data over time. This helps you identify peaks and valleys in customer activity, allowing you to spot trends and potential issues.



Word Cloud

Showcases the most frequently used words in your customer interactions. The larger the word, the more often it appears.



Select any word in the word cloud to filter the entire dashboard and see trending messages containing that word. This allows you to drill down into specific topics and understand the context of their usage.

Benefits

- **One-click insights:** Get a quick overview of your customer interactions without needing to navigate through multiple reports.
- **Date-driven analysis:** Easily explore how interaction volume and key topics change over time.
- **Identify trends and patterns:** Spot emerging trends and recurring issues in your customer conversations.
- **Interactive exploration:** Dive deeper into specific topics and gain a better understanding of customer concerns.

Compare Dashboard(s)

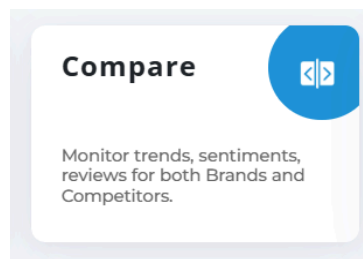
The Dashboard's Compare feature is a powerful tool that empowers you to gain a competitive edge. It provides you with the ability to track key performance indicators (KPIs), such as trends, sentiments, and review scores, for both your brand and top competitors. This powerful tool allows you to identify areas where you excel and pinpoint opportunities for improvement.

Setting up a Compare Dashboard(s)

1. Select **Dashboards** on the left.



2. Select **Compare**.



3. Choose what **workspaces** you want to compare.

WORKSPACE COMPARISON

[DASHBOARD](#) / [LISTEN](#) / [WORKSPACE COMPARISON](#)

4. To add more workspaces **select** the **plus** button to the Right.



Xbert Tip: You can choose to have 10 workspaces to compare at a time.

5. Choose **specific sources** or leave it as All Sources for automatic selection.

Select Source

All Sources

6. Set the desired **time** range for your analysis.

Date Range

2025-01-15 00:00 TO 2025-01-21 14:01

Today	<	Jan 2025							Feb 2025							>	
Yesterday		Su	Mo	Tu	We	Th	Fr	Sa		Su	Mo	Tu	We	Th	Fr	Sa	
Last 7 Days		29	30	31	1	2	3	4		26	27	28	29	30	31	1	
Last Month		5	6	7	8	9	10	11		2	3	4	5	6	7	8	
Custom Range		12	13	14	15	16	17	18		9	10	11	12	13	14	15	
		19	20	21	22	23	24	25		16	17	18	19	20	21	22	
		26	27	28	29	30	31	1		23	24	25	26	27	28	1	
		2	3	4	5	6	7	8		2	3	4	5	6	7	8	
		12 : 00 AM								12 : 00 AM							
2025-01-15 00:00 TO 2025-02-15 00:00																	
																Cancel	Apply

Xbert Tip: You have the option to view up to 30 days on your calendar.

7. Select **Apply** to generate the dashboard with your chosen parameters. You can add more filters or refine existing ones as needed.

2025-01-15 00:00 TO 2025-02-15 00:00

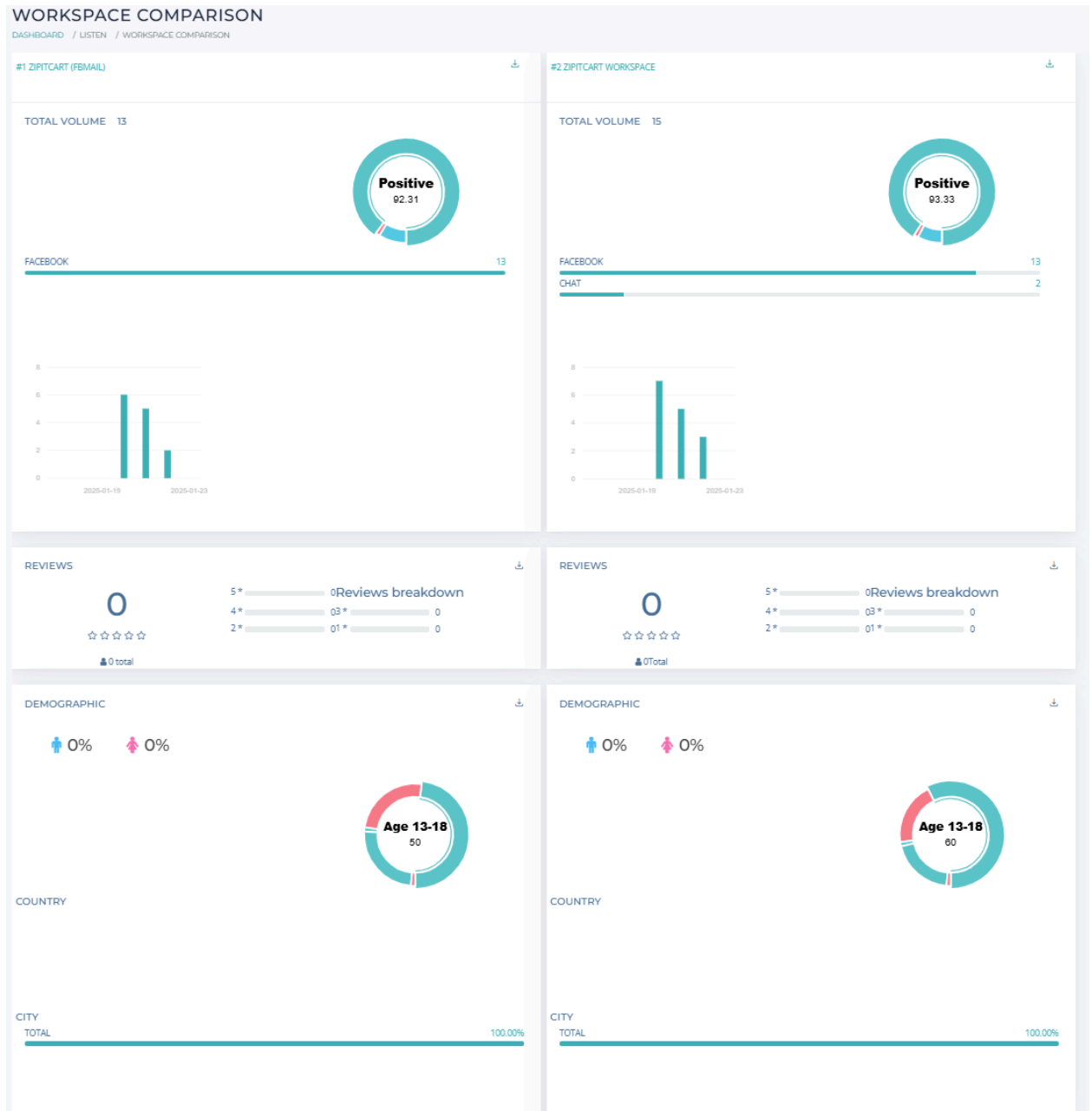
Cancel

Apply

8. Select **Filter** to make the Compare Dashboard.



9. Now you can easily compare the selected workspaces.

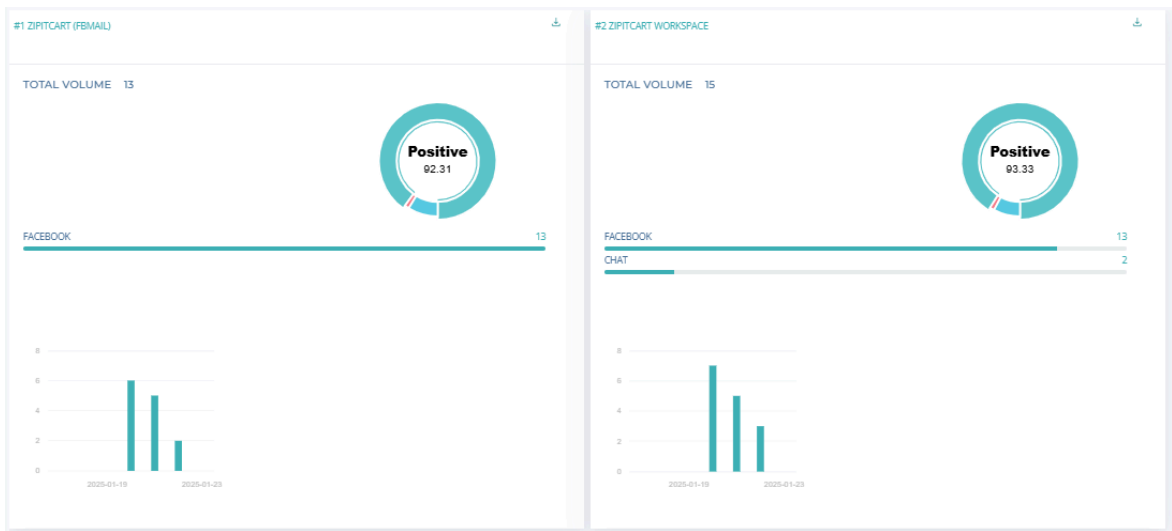


Key Elements of your Compare Dashboard

These data-driven insights enable you to present compelling information showcasing how you can help enhance your brand reputation and achieve your business goals. Ultimately, leveraging the Dashboards Compare feature can strengthen relationships, drive revenue growth, and solidify your position as a trusted advisor.

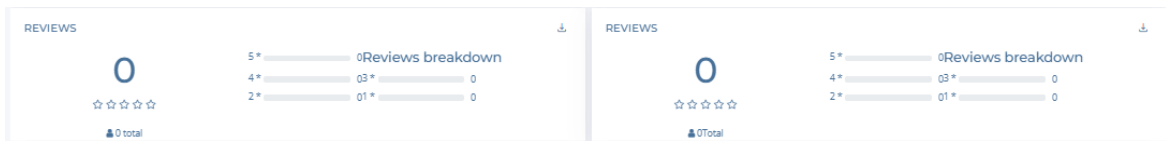
Total Volume

Track overall conversation volume for both your brand and competitors.



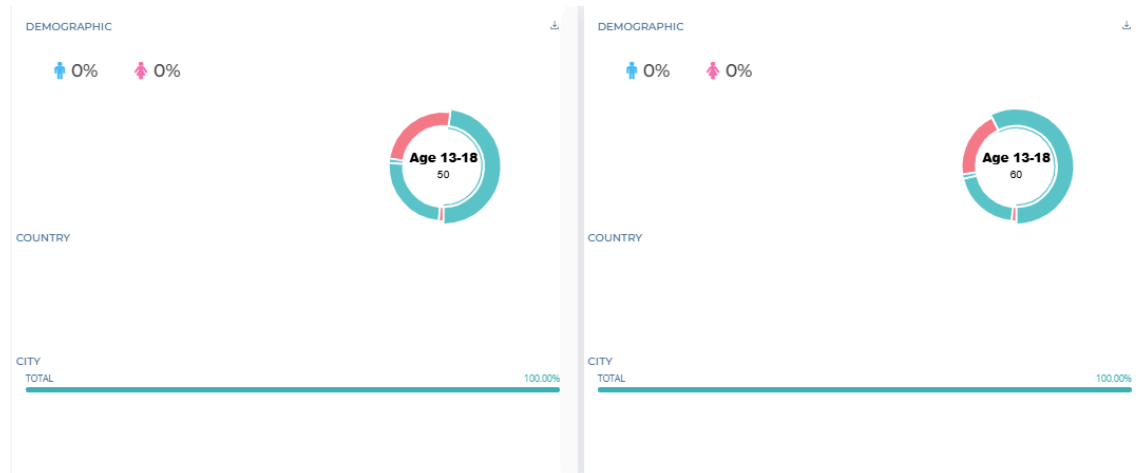
Reviews

Analyze review data to understand customer sentiment and identify areas for improvement.



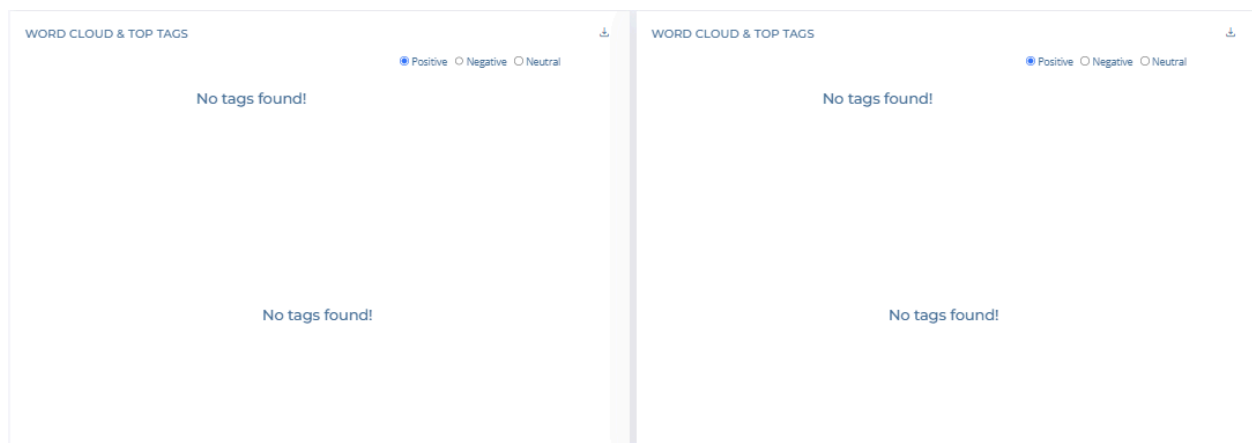
Demographics

Understand your audience and competitor audiences to tailor your marketing efforts.



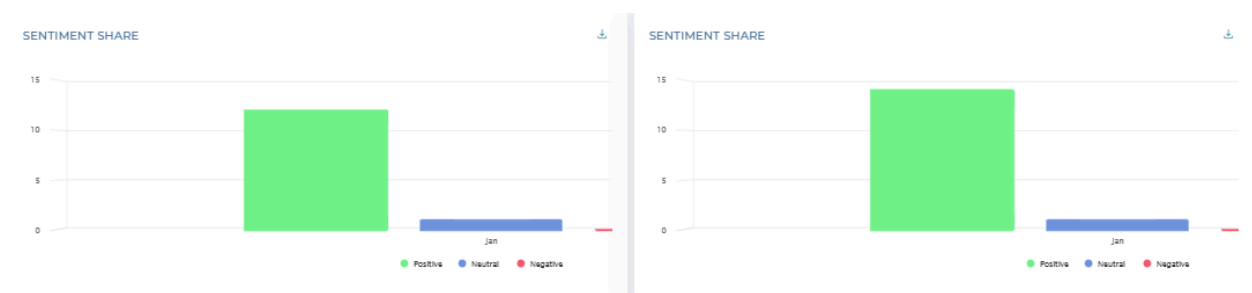
Word Cloud & Top Tags

Uncover key themes and sentiments expressed in online conversations.



Sentiment Share

Gain insights into the overall sentiment (positive, negative, neutral) surrounding your brand and competitors.



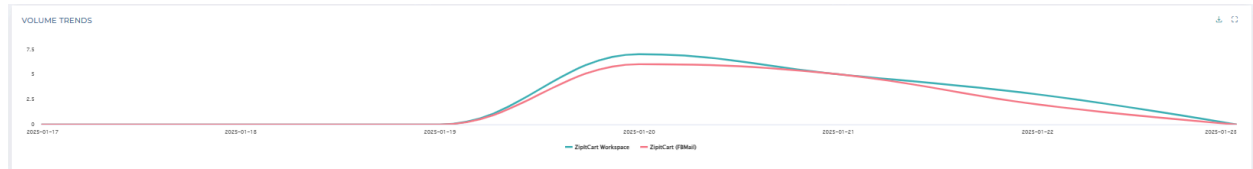
Trend Analysis

Monitor trends in overall volume, positive sentiment, and negative sentiment over time.



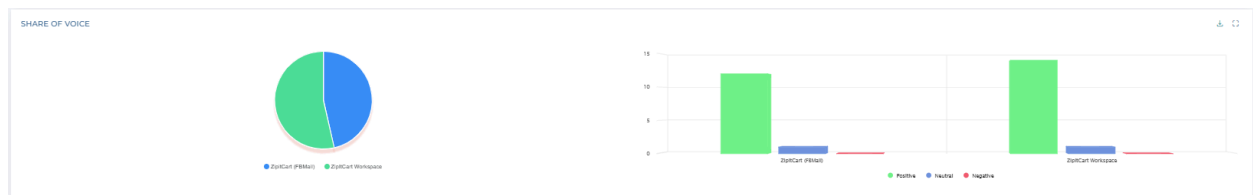
Volume Trends

Analyze trends in conversation volume to identify emerging trends and potential threats.



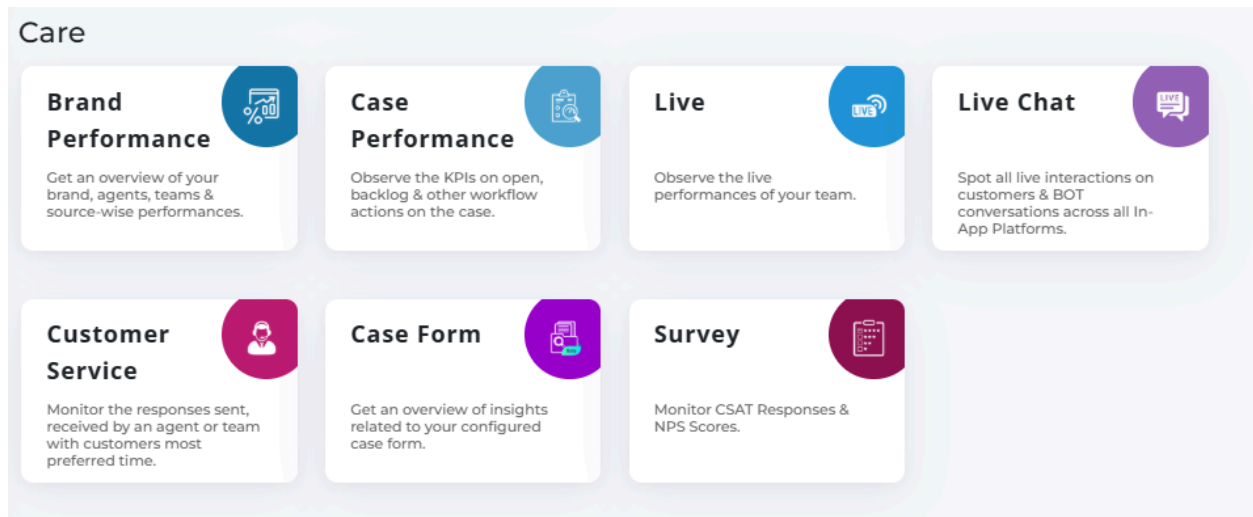
Share of Voice

Track your brand's share of voice compared to competitors to understand market dominance.



Dashboard - Care

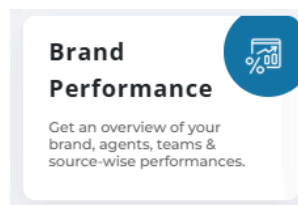
Care dashboards provide insights into overall ticket performance, case statistics, live dashboard metrics, live chat analytics, and customer service trends. These dashboards offer a comprehensive overview of customer support operations, enabling analysis of ticket volume, agent performance, response times, and customer interactions across various channels.



Brand Performance Dashboard

Get an overview of your brand, agents, teams & Source-wise performance.

1. Navigate to **Brand Performance**.



2. Select either **Case Started Between** or **Case Acted Between** along with your desired date range. If using Case Acted Between, you can further refine your data by selecting all working hours, within business hours, or outside business hours.

Case Started Between

☒ All Working Hours ☐ Within Business Hours ☐ Outside Business Hours

3. Select the **Workspace** you want to analyze.

Select Workspace*

CX Workspace x

Xbert Tip: if you select the x on accident and remove the workspace, just select the drop down again and select that workspace again.

4. Select the relevant **Channels**.

Select Channel

ZipitCart (Page) x

ZipitCart (FBMail) x

zipitcart (Instagram Direct Message) x

zipitcart (Instagram Business) x

ZipitCart (Chat) x

5. Select a specific **Source** or leave it at **All Sources**.

Select Source

All Sources
Amazon Reviews
Blogs
Discussions
Email
Facebook Group

6. Select a specific **Workbasket** or leave it to include **All Workbaskets**.

All Workbasket

CX Workspace Basket ▼

7. Select specific **Users** or leave it to include **All Users**.

Select User(s)

All Users
All Users

8. Turn the Holiday Calendar **On** or **Off** as needed.

TAT/FRT/ART/AHT calculation with  Holiday Calendar On

9. Select **Filter**.



Brand Performance Dashboard View

The dashboard is organized into sections to provide a comprehensive overview:

Grand Total

Overall summary metrics.

GRAND TOTAL			
 Total Tickets	1	 Assigned	0
100 % Change ↑			
 Re-Assigned	0	 Replied	1
 Ignored	0	 In-Progress	0
 Soft Closed	0	 Closed	0

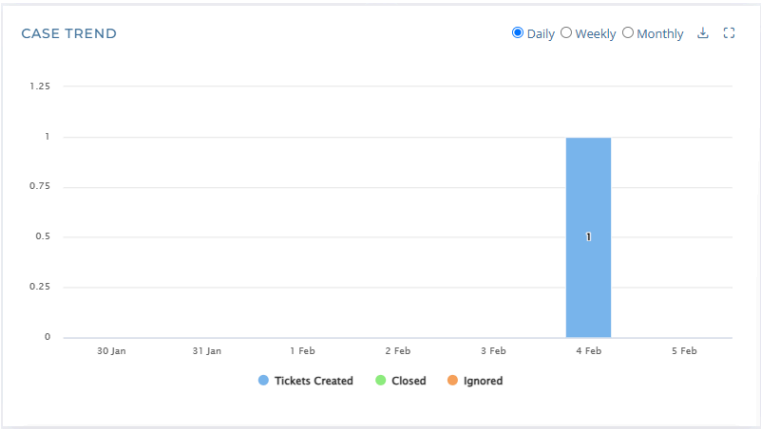
AI Total

Metrics specifically related to AI performance.

AI TOTAL			
 Total Tickets	0	 Replied	0
100 % Change ↑			
 Ignored	0	 Failed	0
 % Handled	0	 % Replied	0
 AI Handled	0	 Agent Intervention	0
 Assigned	0	 Re-Assigned	0
 Soft Closed	0	 Closed	0

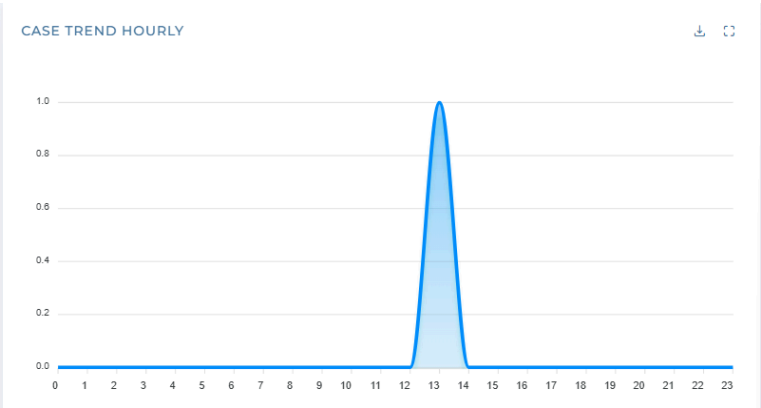
Case Trends

Trends over daily, weekly, and monthly periods.



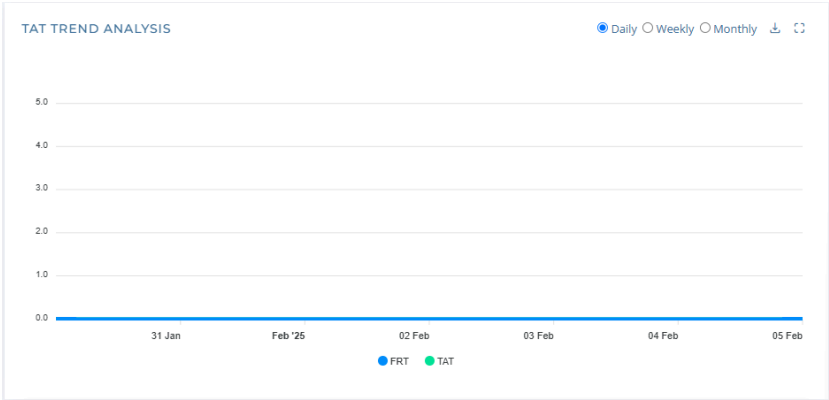
Case Trend Hourly

Hourly case trends.



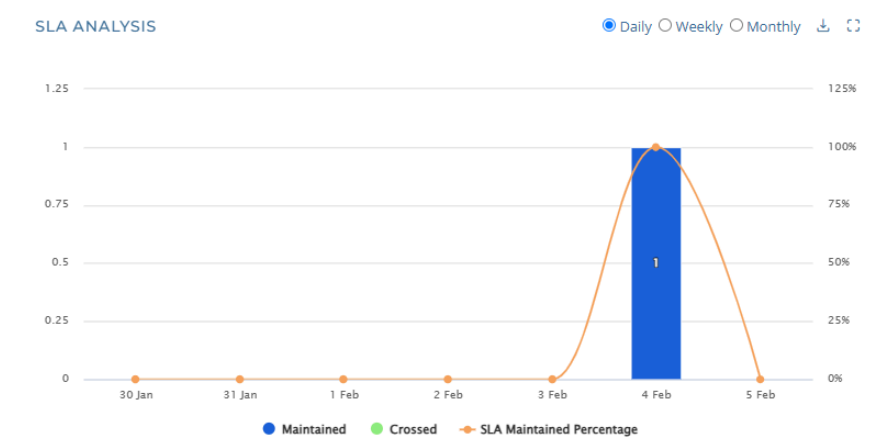
TAT (Turnaround Time) Trend Analysis

Daily, weekly, and monthly analysis of turnaround time.



SLA (Service Level Agreement) Analysis

Daily, weekly, and monthly SLA analysis. You will be able to see what is closed or maintained.



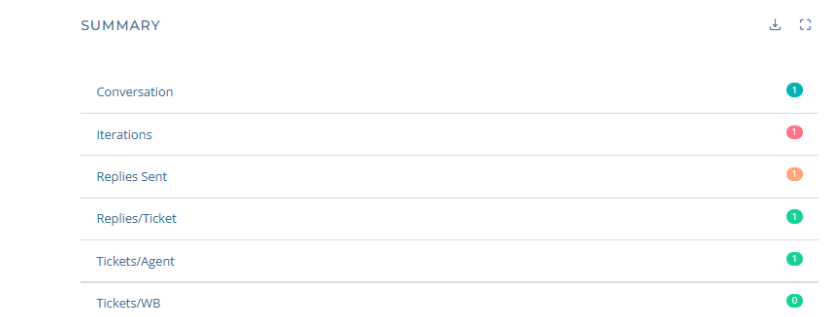
Source Distribution

Distribution of **Cases** that are created.



Summary

Key performance metrics include **active conversations, conversation iterations (back-and-forth exchanges), total replies sent, replies per ticket, agent workload (tickets per agent), and ticket in workbasket.**



AI/Agent Performance

A comparative analysis of First Response Time (FRT) and Average Response Time (ART) for human agents versus AI agents.

AI/AGENT PERFORMANCE		↓	🔗
Agent FRT		NA	
Agent ART		1 Day(s), 1 Hour(s)	
AI FRT		NA	
AI ART		NA	

Overall Performance

These metrics provide a clear overview of response efficiency, focusing on both the average time taken to respond and the speed of the first reply.

OVERALL PERFORMANCE		↓	🔗
FRT		NA	
ART		1 Day(s), 1 Hour(s)	
TAT		NA	
FRT Breaches		0	
TAT Breaches		0	

Navigating the Brand Performance Dashboard

Brand Performance Agent

1. Select the **Agent Overview** at the top middle of the page.



2. View the **Total Agent Status** and see who is online.

TOTAL AGENT STATUS

Agent Name	Email	Assign	Reassign	Ongoing	Replied	Failed	Soft Closed	In-Progress
Carra Scarbrough	carra.scarbrough+coredemo@lab.nextiva.com	0	0	0	1	0	0	0

Showing 1 to 1 of 1 entries

3. View the **Current Agent Status**.

CURRENT AGENT STATUS

Agent Name	Email	Assign	Reassign	Ongoing	Replied	Failed	Soft Closed	In-Progress
Carra Scarbrough	carra.scarbrough+coredemo@lab.nextiva.com	0	0	0	1	0	0	0

Showing 1 to 1 of 1 entries

4. View **Agent Performance Status**.

AGENT PERFORMANCE STATUS

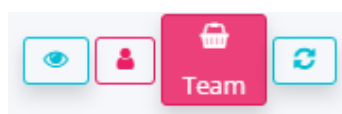
Agent Name	Email	Time Spent on Tool	Time Spent on Playmode	Total Breaks	Top (3) Reasons for Breaks	FRT	AHT	FRT Crossed	TAT Crossed
Carra Scarbrough	carra.scarbrough+coredemo@lab.nextiva.com	11 Hour(s), 46 Minute(s)	NA	0		NA	NA	0	0

Showing 1 to 1 of 1 entries

Previous Next

Brand Performance Team

1. Select the **Team Overview** at the top middle of the page.



2. **Total Workbasket Status.** The overall status of all active work items assigned to the team.

TOTAL WORKBASKET STATUS



Basket Name														Handled
No conversations available in the selected duration														
Basket Name	Assign	Reassign	Ongoing	Replied	Failed	Soft Closed	In-Progress	Pending	Approved	Edit & Approved	Reject	Ignored	Closed	Handled

3. **Current Workbasket Status.** A snapshot of the current status of work items, potentially showing breakdowns by priority, type, or other relevant categories.

CURRENT WORKBASKET STATUS



Basket Name													
No conversations available in the selected duration													
Basket Name	Assign	Reassign	Ongoing	Replied	Failed	Soft Closed	In-Progress	Pending	Approved	Edit & Approved	Reject	Ignored	Closed

4. **Workbasket Case Status.** Detailed status information for individual work items (cases), likely including current stage, assigned personnel, and deadlines.

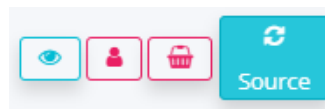
WORKBASKET CASE STATUS



Basket Name	FRT	AHT	FRT Crossed	TAT Crossed
No conversations available in the selected duration				
Workbasket Name	FRT	AHT	FRT Crossed	TAT Crossed

Brand Performance Source

1. Select the **Source**.



2. View your **Total Source** Status.

TOTAL SOURCE STATUS



Show 10 entries

Search:

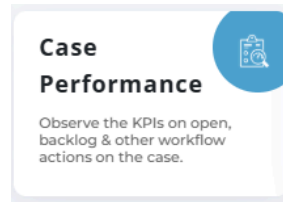
Sources	Cases	Conversations in Cases	Unique Users	Replies made	Total No Agents
Facebook Mail	1	1	1	1	1
Sources	Cases	Conversations in Cases	Unique Users	Replies made	Total No Agents

Case Performance Dashboard

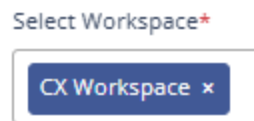
1. Navigate to the **Dashboards** section.



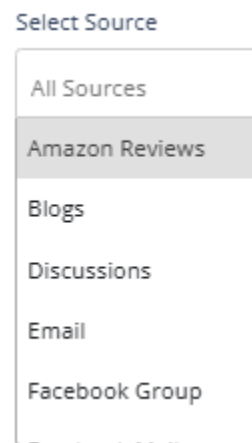
2. Select the **Case Performance** Dashboard.



3. Select the **Workspace** for which you want to view performance data.



4. Choose a specific **Source** to filter by, or leave it at **All Sources** to include all data.



5. Select a date range of up to **30 business days**.

Date Range

2025-01-31 00:00 TO 2025-02-06 07:26

Today

Yesterday

Last 7 Days

Last Month

Custom Range

< Jan 2025 >

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4	26	27	28	29	30	31	1
5	6	7	8	9	10	11	2	3	4	5	6	7	8
12	13	14	15	16	17	18	9	10	11	12	13	14	15
19	20	21	22	23	24	25	16	17	18	19	20	21	22
26	27	28	29	30	31	1	23	24	25	26	27	28	1
2	3	4	5	6	7	8	2	3	4	5	6	7	8

12 ▾

 :

00 ▾

AM ▾

7 ▾

 :

28 ▾

AM ▾

2025-01-01 00:00 TO 2025-01-31 07:26

Cancel

Apply

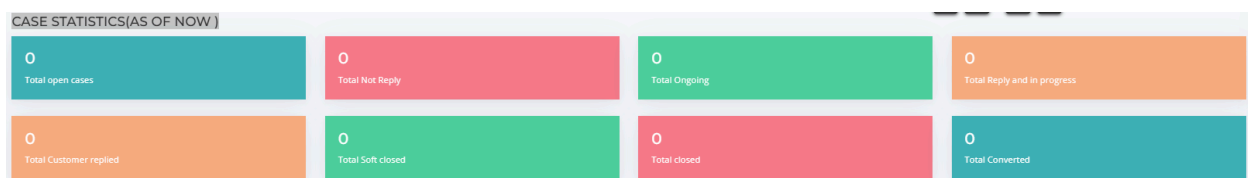
6. Select **Filter** to apply your chosen workspace, source, and date range.



Case Performance Dashboard View

Case Statistics (AS OF NOW)

This view summarizes open case status, showing totals for new/unreplied cases, ongoing/in-progress cases, customer replies, soft-closed cases, closed cases, and converted cases.



Case Statistics (As Of Now) - Hourly Distribution

This view breaks down **open case status in real time**, showing totals for new/unreplied cases, ongoing/in-progress cases, customer replies, soft-closed cases, closed cases, and converted cases within each hour.

HOURLY DISTRIBUTION CASE STATISTICS(AS OF NOW)

Timeline	Total open case	Not Reply	Ongoing	Reply in Progress	Customer Replied	Soft Close	Closed	Converted
4 Hours	0	0	0	0	0	0	0	0
8 Hours	0	0	0	0	0	0	0	0
24 Hours	0	0	0	0	0	0	0	0
48 Hours	0	0	0	0	0	0	0	0
72 Hours	0	0	0	0	0	0	0	0
96 Hours	0	0	0	0	0	0	0	0
1 Week	0	0	0	0	0	0	0	0
2 Weeks	0	0	0	0	0	0	0	0
15 days & older	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0	0

Performance (As Of Now) - Team and Agent

This view displays **real-time performance metrics**, broken down by both Workbasket(s) and individual agent(s), providing insights into productivity and efficiency.

TEAM AND AGENT WISE PERFORMANCE(AS OF NOW)

Agent/Team	Total open case	Not Reply	Ongoing	Reply in Progress	Customer Replied	Soft Close	Closed	Converted
Total	0	0	0	0	0	0	0	0

Case Statistics (CURRENT MONTH)

This view provides a **monthly summary of open case status**, showing totals for new/unreplied cases, ongoing/in-progress cases, customer replies, soft-closed cases, closed cases, and converted cases.

CASE STATISTICS (CURRENT MONTH)

0 Total open cases	0 Total Not Reply	0 Total Ongoing	0 Total Reply and in progress
0 Total Customer replied	0 Total Soft closed	0 Total closed	0 Total Converted

Case Statistics (Current Month) - Hourly Distribution

This view breaks down the **monthly open case status by hour**, showing totals for new/unreplied cases, ongoing/in-progress cases, customer replies, soft-closed cases, closed cases, and converted cases within each hour of the current month.

HOURLY DISTRIBUTION CASE STATISTICS(CURRENT MONTH)

Timeline	Total open case	Not Reply	Ongoing	Reply in Progress	Customer Replied	Soft Close	Closed	Converted
4 Hours	0	0	0	0	0	0	0	0
8 Hours	0	0	0	0	0	0	0	0
24 Hours	0	0	0	0	0	0	0	0
48 Hours	0	0	0	0	0	0	0	0
72 Hours	0	0	0	0	0	0	0	0
96 Hours	0	0	0	0	0	0	0	0
1 Week	0	0	0	0	0	0	0	0
2 Weeks	0	0	0	0	0	0	0	0
15 days & older	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0	0

Performance (Current Month) - Team and Agent

This view displays monthly performance metrics, broken down by both workbasket(s) and individual agent(s), providing insights into productivity and efficiency for the current month.

TEAM AND AGENT WISE PERFORMANCE(CURRENT MONTH)

Agent/Team	Total open case	Not Reply	Ongoing	Reply in Progress	Customer Replied	Soft Close	Closed	Converted
Total	0	0	0	0	0	0	0	0

Case Statistics (Default Current Week But Change Based on Selected Date Range)

This view shows the **Total Open Cases, Not Reply, Ongoing, Reply and In Progress, Customer Replied, Soft Closed, Closed, and Converted** over a selected date range.

CASE STATISTICS (DEFAULT CURRENT WEEK BUT CHANGE BASED ON SELECTED DATE RANGE)

0 Total open cases	0 Total Not Reply	0 Total Ongoing	0 Total Reply and in progress
0 Total Customer replied	0 Total Soft closed	0 Total closed	0 Total Converted

Case Statistics (Default Current Week But Change Based on Selected Date Range) - Hourly Distribution

HOURLY DISTRIBUTION CASE STATISTICS (DEFAULT CURRENT WEEK BUT CHANGE BASED ON SELECTED DATE RANGE)

Timeline	Total open case	Not Reply	Ongoing	Reply in Progress	Customer Replied	Soft Close	Closed	Converted
4 Hours	0	0	0	0	0	0	0	0
8 Hours	0	0	0	0	0	0	0	0
24 Hours	0	0	0	0	0	0	0	0
48 Hours	0	0	0	0	0	0	0	0
72 Hours	0	0	0	0	0	0	0	0
96 Hours	0	0	0	0	0	0	0	0
1 Week	0	0	0	0	0	0	0	0
2 Weeks	0	0	0	0	0	0	0	0
15 days & older	0	0	0	0	0	0	0	0
Total	0	0	0	0	0	0	0	0

Performance (Default Current Week But Change Based on Selected Date Range) - Team and Agent

TEAM AND AGENT WISE PERFORMANCE (DEFAULT CURRENT WEEK BUT CHANGE BASED ON SELECTED DATE RANGE)

Agent/Team	Total open case	Not Reply	Ongoing	Reply in Progress	Customer Replied	Soft Close	Closed	Converted
Total	0	0	0	0	0	0	0	0

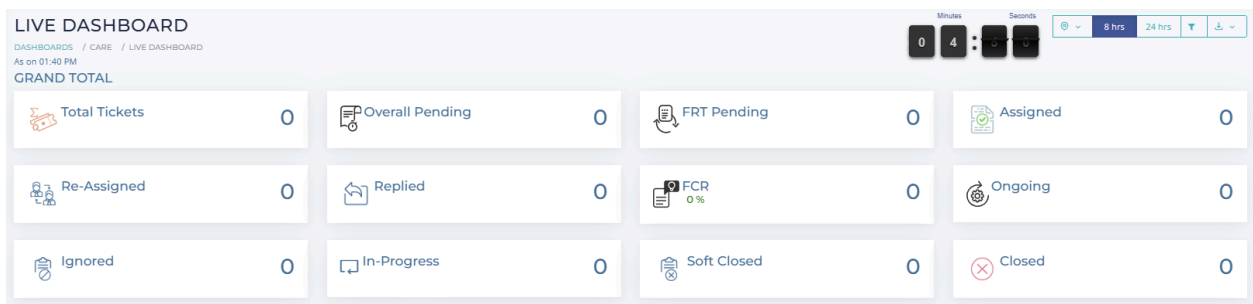
Xbert Tip: Don't forget to PIN (SAVE) your Case Performance Dashboard. You can do this by selecting the save button up by the countdown clock.

Live Dashboard

The Live Dashboard provides a real-time overview of key metrics, updated every 5 minutes. Here's a breakdown of the available sections:

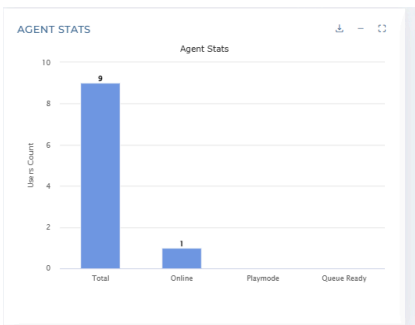
Grand Total

Provides overall summary statistics across all relevant data points. This section offers a high-level view of performance.

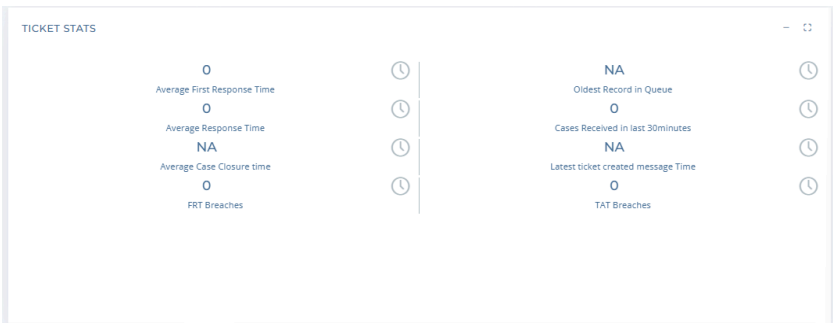


Agent Status

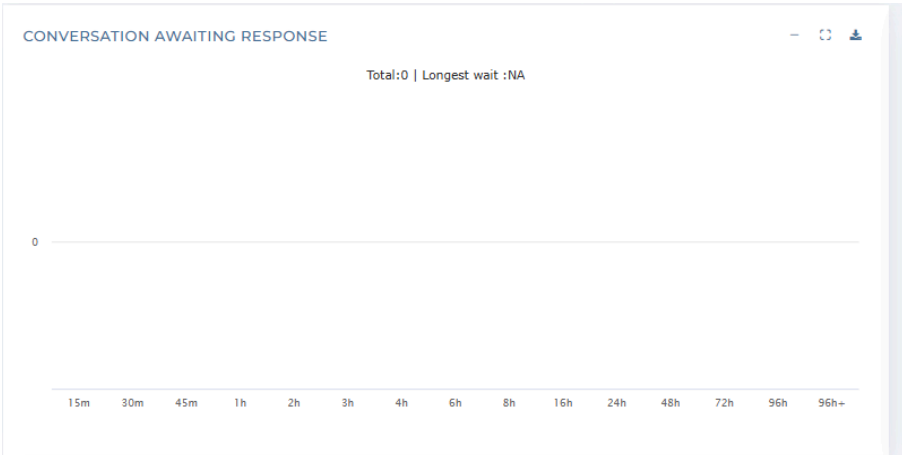
Displays the current status of your agents (e.g., Available, Busy, Offline). This helps you monitor agent availability and workload distribution.



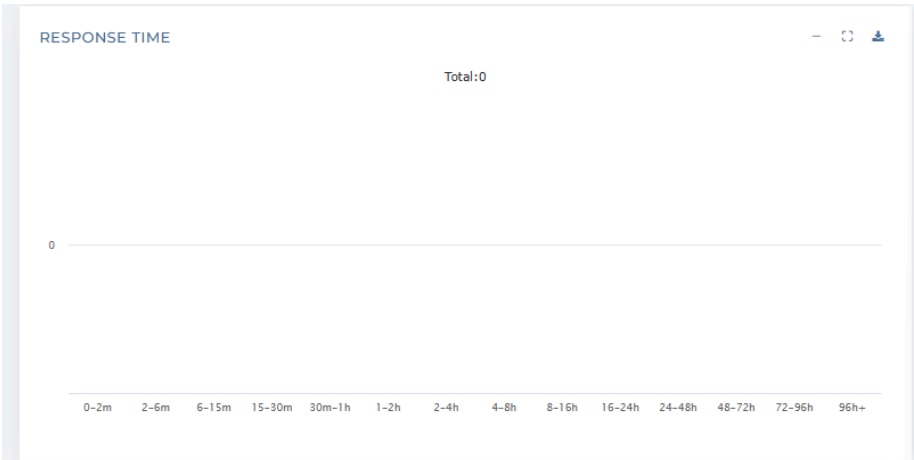
Ticket Stats: Shows key metrics related to tickets, such as the total number of open tickets, new tickets, resolved tickets, etc. This section provides insight into ticket volume and handling efficiency.



Conversation Awaiting Response: Highlights conversations that are currently awaiting a response. This helps identify potential bottlenecks and ensure timely customer communication.



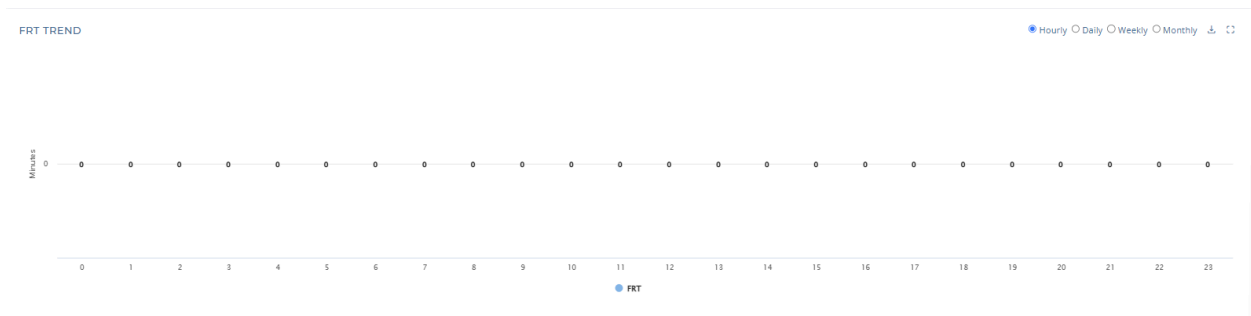
Response Time: Tracks the average time it takes for agents to respond to inquiries. This metric is crucial for measuring customer service responsiveness.



Case Closure Time Distribution: Shows the distribution of case closure times. This helps identify trends in case resolution and pinpoint areas for improvement.



FRT Trend (First Response Time Trend): Visualizes the trend of first response times over a specific period. This allows you to monitor changes in responsiveness and identify potential issues.



Real-Time Dashboard

Provides a dynamic, up-to-the-minute view of key performance indicators (KPIs). This section offers a snapshot of current performance.

REAL TIME DASHBOARD							Online Users	All Users		
Show 10 entries							Search:			
Sl No.		Name		Status		Channel Source		Reason		Time
1		Carra Scarbrough		Not in Play mode						
Showing 1 to 1 of 1 entries										
Previous 1 Next										

Agent Productivity

Measures the productivity of individual agents, often including metrics like the number of tickets handled, average handle time, etc. This helps evaluate agent performance and identify areas for coaching.

AGENT PRODUCTIVITY

Show 10 entries

Agent Name	Email												
Carra Scarbrough	carra.scarbrough+coredemo@lab.nextiva.com	0	0	0	0	0	0	0	0	0	0	0	0
Agent Name	Agent Email	Assign	Reassign	Ongoing	Replied	Failed	Soft Closed	In-Progress	Pending	Approved	Edit & Approved	Reject	Ignored

Showing 1 to 1 of 1 entries

PreviousNext

Agent Performance

Provides a more detailed view of individual agent performance, potentially including metrics like customer satisfaction scores, adherence to service level agreements (SLAs), etc.

AGENT PERFORMANCE

Show

10

entries

Agent Name	Email	Time Spent on Tool	Time Spent on Playmode	Total Breaks	Top (3) Reasons for Breaks	FRT	AHT	FRT Crossed	TAT Crossed
Carra Scarbrough	carra.scarbrough+coredemo@lab.nextiva.com	6 Hour(s), 16 Minute(s)	NA	0		NA	NA	0	0
Agent Name	Agent Email	Time Spent on Tool	Time Spent on Playmode	Total Breaks	Top (3) Reasons for Breaks	FRT	AHT	FRT Crossed	TAT Crossed

Showing 1 to 1 of 1 entries

PreviousNext

Workflow Stats by Workbasket

Tracks the performance of different workflows based on workbaskets. This helps analyze the efficiency of different processes

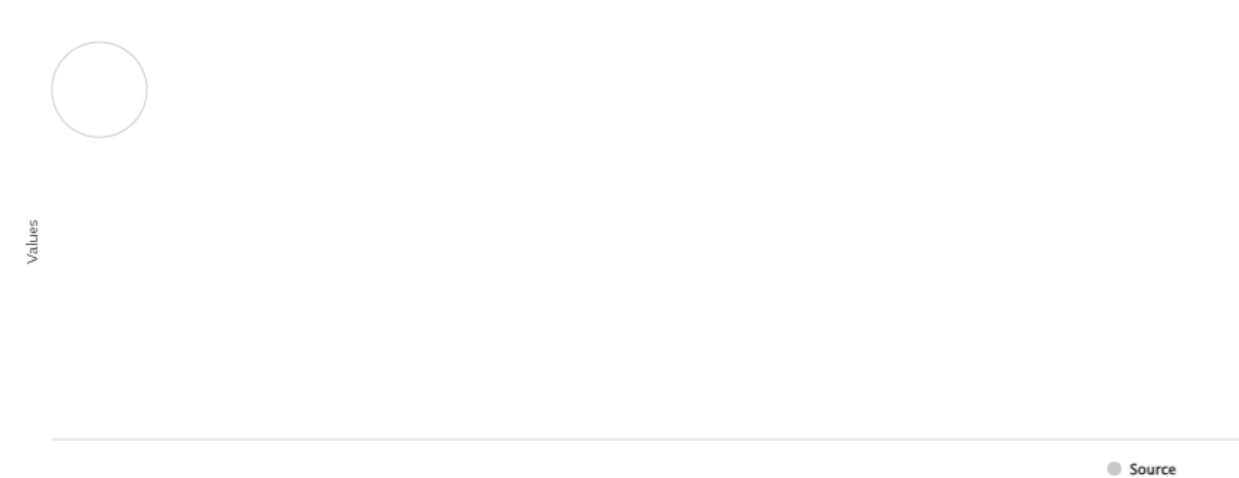
WORKFLOW STATS BY WORKBASKET

Name													
No Activity Found													
	Assigned	Re-Assigned	Ongoing	Replied	Failed	Soft Closed	In-Progress	Pending	Approved	Edit & Approved	Rejected	Ignored	Closed

Sourcewise Distribution of Cases

Shows the distribution of cases based on their source (e.g., email, phone, chat). This helps understand where cases are originating and allocate resources effectively.

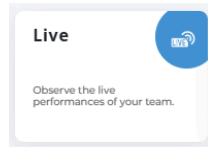
SOURCEWISE DISTRIBUTION OF CASES



Filtering the Live Dashboard

This guide explains how to access, filter, and set the date range for data displayed in the Live Dashboard.

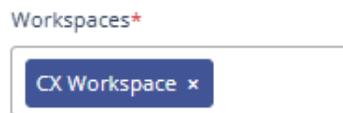
1. Navigate to the **Live** Dashboard.



1. If you wish to filter the data, select the **Filter** button (usually at the top right).



2. Select the **Workspace** you want to view from the workspace dropdown menu.



3. Select the desired **Channels**. You can often select **individual** channels or **groups** of channels.



4. Select the specific **Baskets** you want to include.



5. Filter by a specific **Source**, or leave the default **All Sources** to view data from all sources.



6. Choose the desired **Date Range** for the data you want to view. This is usually done via a calendar selector or pre-defined options (e.g., Today, Yesterday, Last 7 Days, Custom Range).

Date Range

2025-01-31 00:00 TO 2025-02-06 07:26

Today

Yesterday

Last 7 Days

Last Month

Custom Range

< Jan 2025 >

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4	26	27	28	29	30	31	1
5	6	7	8	9	10	11	2	3	4	5	6	7	8
12	13	14	15	16	17	18	9	10	11	12	13	14	15
19	20	21	22	23	24	25	16	17	18	19	20	21	22
26	27	28	29	30	31	1	23	24	25	26	27	28	1
2	3	4	5	6	7	8	2	3	4	5	6	7	8

12 : 00 AM 7 : 26 AM

2025-01-01 00:00 TO 2025-01-31 07:26 Cancel Apply

7. Select the **Filter** button to update the dashboard to view your chosen filters and date range.

Filter

Live Chat Dashboard

This dashboard provides a comprehensive view of chat activity across different platforms. It displays key metrics such as total chats, average session duration, wait time, average first response time (FRT), and the number of ongoing, replied, soft-closed, and closed chats.

Filtering the Live Chat Dashboard

1. Select the **Filter** button (usually at the top right).



2. Select the **Workspace** you want to view.

Select Workspace*

CX Workspace x

3. Choose the **Source** (e.g., WeChat, Facebook Messenger, Live Chat) or select multiple sources.

Select Source

Live Chat x

Whatsapp x

Facebook Messenger x

Instagram Direct Message x

4. Select the **Date Range** for the data you want to analyze.

Date Range

2025-01-31 00:00 TO 2025-02-06 07:26

	Jan 2025							Feb 2025							
	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	
Today				1	2	3	4	26	27	28	29	30	31	1	
Yesterday															
Last 7 Days	5	6	7	8	9	10	11	2	3	4	5	6	7	8	
Last Month	12	13	14	15	16	17	18	9	10	11	12	13	14	15	
Custom Range	19	20	21	22	23	24	25	16	17	18	19	20	21	22	
	26	27	28	29	30	31	1	23	24	25	26	27	28	1	
	2	3	4	5	6	7	8	2	3	4	5	6	7	8	
	12							7							

2025-01-01 00:00 TO 2025-01-31 07:26 Cancel Apply

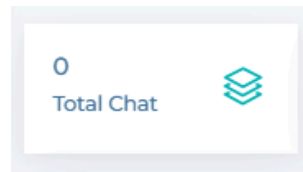
5. Select **Filter** to apply your selections and update the dashboard.

Filter

Key Metrics and Sections

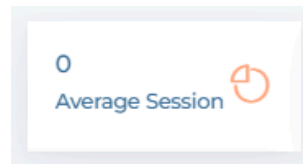
Total Chat

Overview of all live and active customer conversations.



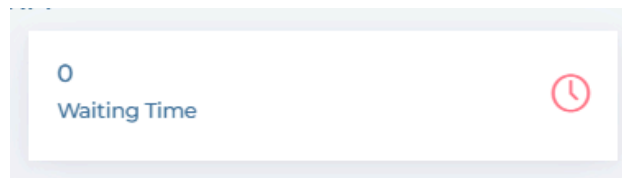
Average Session Duration

Indicates the average length of customer chat sessions. Useful for understanding customer engagement.



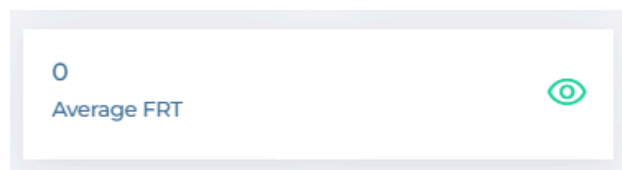
Average Wait Time

Measures the average time customers wait for an initial response. A key indicator of responsiveness.



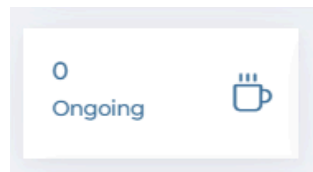
Average First Response Time (FRT)

Tracks the average time it takes for an agent to send the *first* reply to a customer. Important for setting expectations.



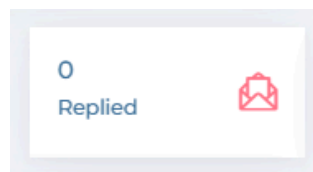
Ongoing Conversations

Number of currently active chat sessions.



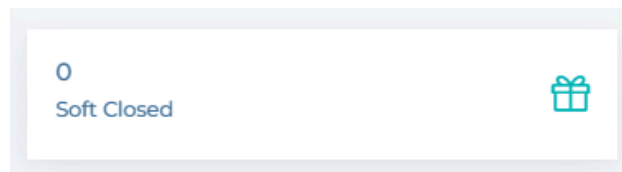
Replied Chats

Count of chats where an agent has sent at least one response.



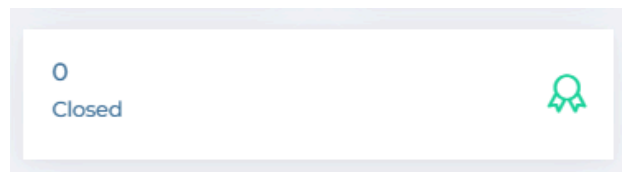
Soft Closed

Chats that have been concluded by the agent but may still be reopened by the customer (e.g., waiting for follow-up).



Closed

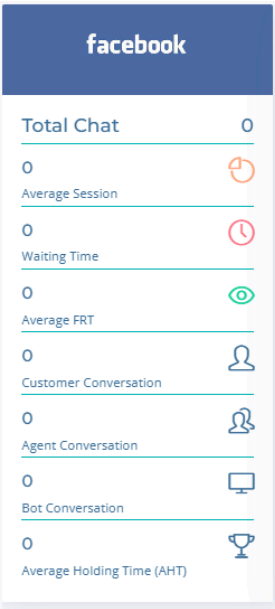
Number of completed and finalized chat sessions.



Chat Application Breakdown

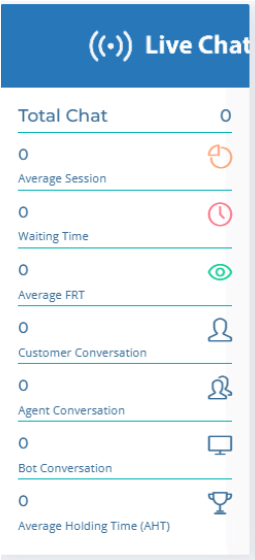
Facebook

You can review the average session duration, wait time, average First Response Time (FRT), customer conversations, average conversation length, bot conversations, and average hold time (AHT).



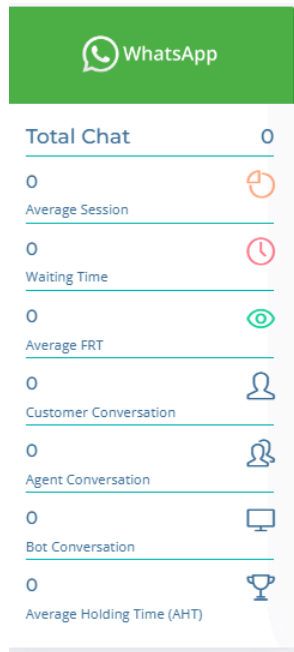
Live Chat

You can review the average session duration, wait time, average First Response Time (FRT), customer conversations, average conversation length, bot conversations, and average hold time (AHT).



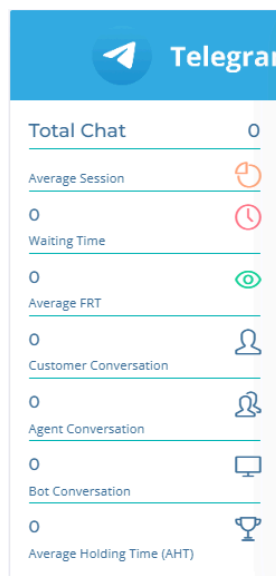
WhatsApp

You can review the average session duration, wait time, average First Response Time (FRT), customer conversations, average conversation length, bot conversations, and average hold time (AHT).



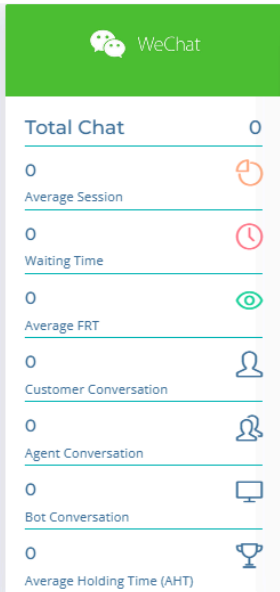
Telegram

You can review the average session duration, wait time, average First Response Time (FRT), customer conversations, average conversation length, bot conversations, and average hold time (AHT).



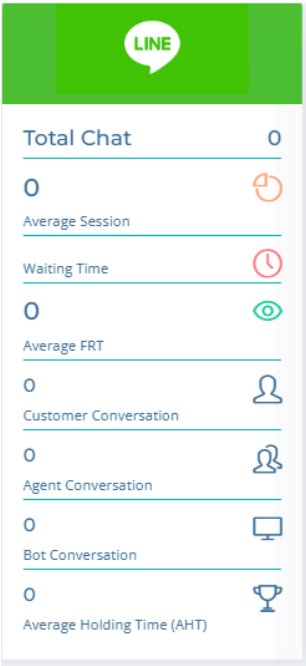
WeChat

You can review the average session duration, wait time, average First Response Time (FRT), customer conversations, average conversation length, bot conversations, and average hold time (AHT).



Line

You can review the average session duration, wait time, average First Response Time (FRT), customer conversations, average conversation length, bot conversations, and average hold time (AHT).



Twitter Chat

You can review the average session duration, wait time, average First Response Time (FRT), customer conversations, average conversation length, bot conversations, and average hold time (AHT).

Twitter Chat	
Total Chat	0
0 Average Session	
0 Waiting Time	
0 Average FRT	
0 Customer Conversation	
0 Agent Conversation	
0 Bot Conversation	
0 Average Holding Time (AHT)	

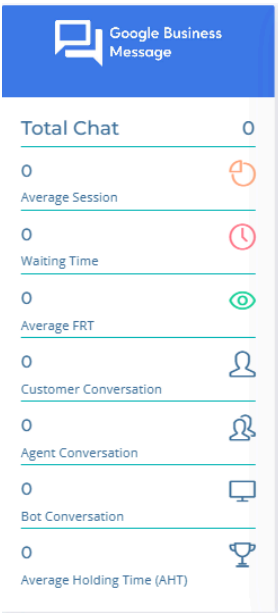
Viber Chat

You can review the average session duration, wait time, average First Response Time (FRT), customer conversations, average conversation length, bot conversations, and average hold time (AHT).

Viber Chat	
Total Chat	0
0 Average Session	
0 Waiting Time	
0 Average FRT	
0 Customer Conversation	
0 Agent Conversation	
0 Bot Conversation	
0 Average Holding Time (AHT)	

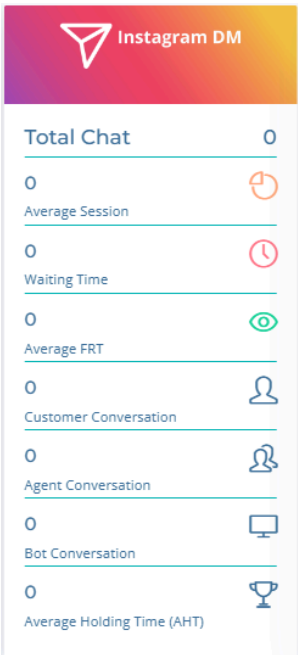
Google Business Message

You can review the average session duration, wait time, average First Response Time (FRT), customer conversations, average conversation length, bot conversations, and average hold time (AHT).



Instagram DM

You can review the average session duration, wait time, average First Response Time (FRT), customer conversations, average conversation length, bot conversations, and average hold time (AHT).



Twilio

You can review the average session duration, wait time, average First Response Time (FRT), customer conversations, average conversation length, bot conversations, and average hold time (AHT).

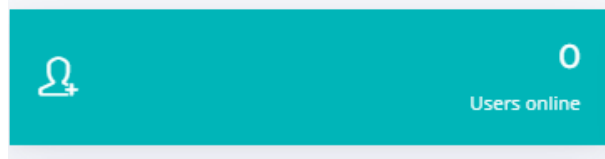


Total Chat	0
0	
Average Session	
0	
Waiting Time	
0	
Average FRT	
0	
Customer Conversation	
0	
Agent Conversation	
0	
Bot Conversation	
0	
Average Holding Time (AHT)	

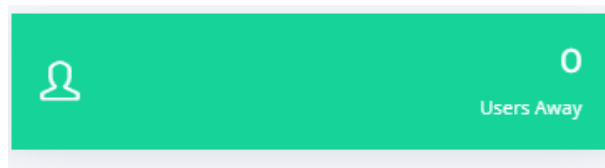
Live Web User Stats

This section provides real-time information about online users:

- Online Users



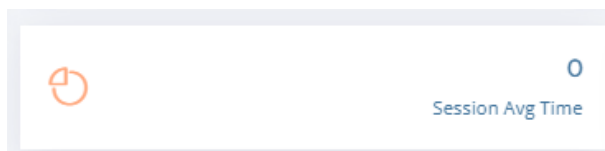
- Away Users



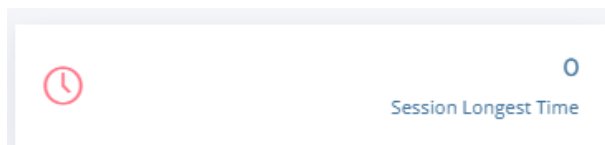
- Offline Users



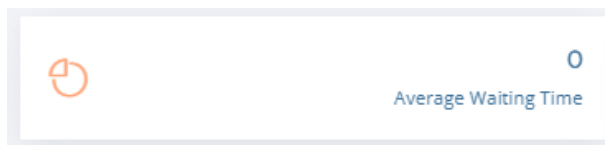
- Average Session Duration



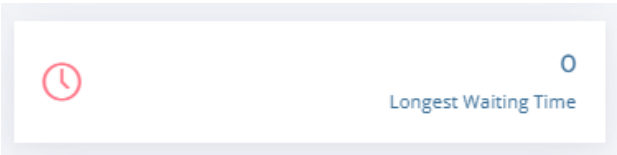
- Longest Session Duration



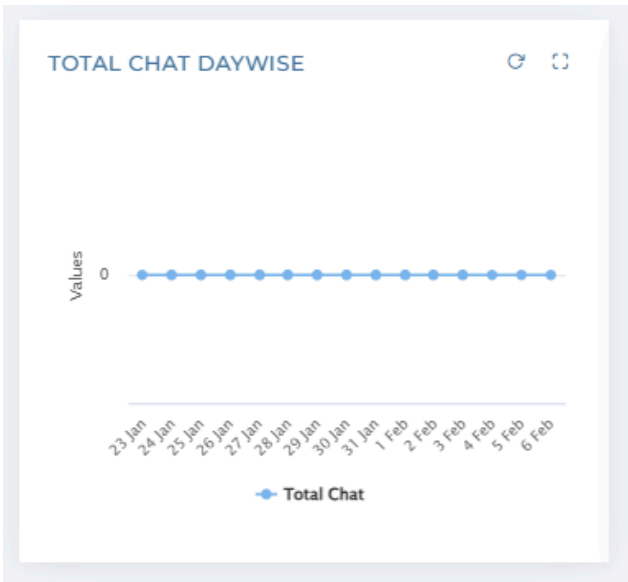
- Average Wait Time



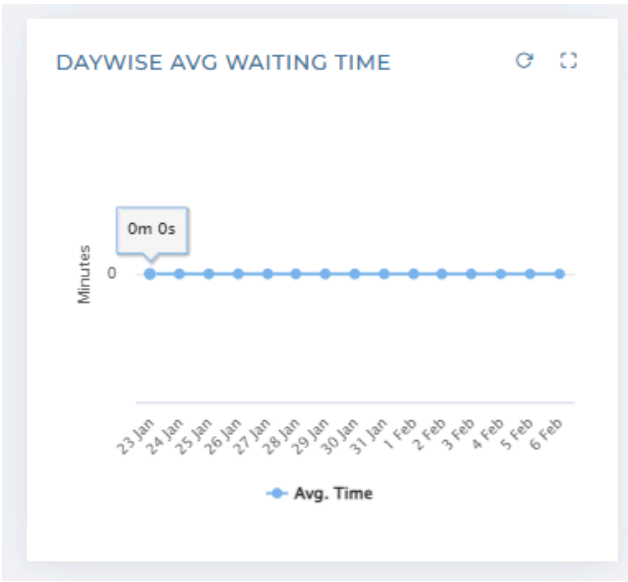
- Longest Wait Time



- Total Chats (Daywise)



- Average Waiting Time (Daywise)



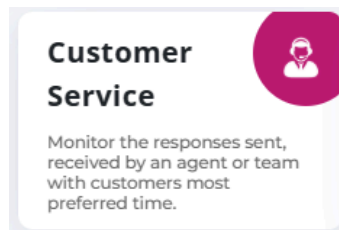
Accessing and Filtering the Customer Service Dashboard

This dashboard helps you analyze agent engagement during optimal customer availability. By aligning agent activity with customer availability, you can optimize communication and improve customer experience. This data also highlights potential staffing or scheduling needs.

1. Navigate to the **Dashboards** section.



2. Select the **Customer Service** Dashboard.



3. Select the relevant **Workspace**.

Select Workspace*

Select Workspace

4. Choose the specific **Source** you want to analyze.

Select Source

All Sources

5. Select the desired **Date Range**.

Date Range

2025-02-04 00:00 TO 2025-02-10 09:32

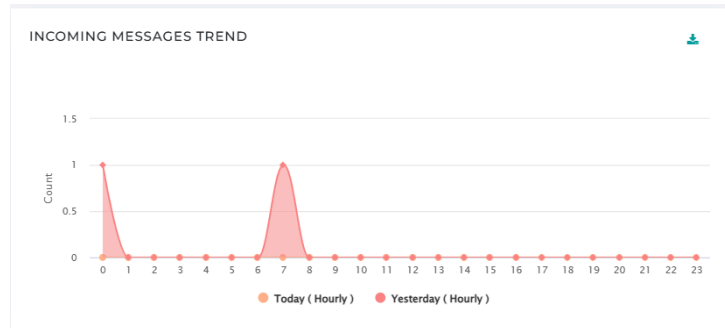
6. Select **Filter** to apply your selections and view the dashboard data.



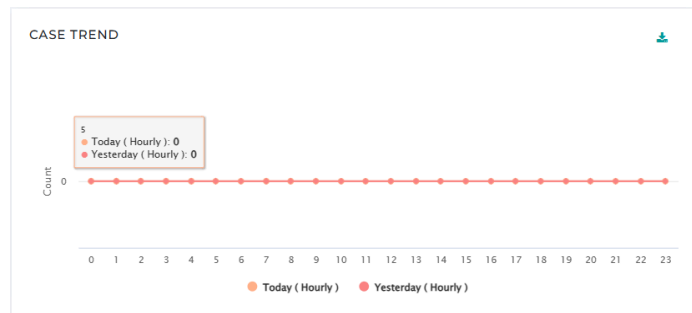
Understanding the Customer Service Dashboard View

The Customer Service Dashboard provides a comprehensive overview of key performance indicators and trends. Here's a breakdown of the available metrics:

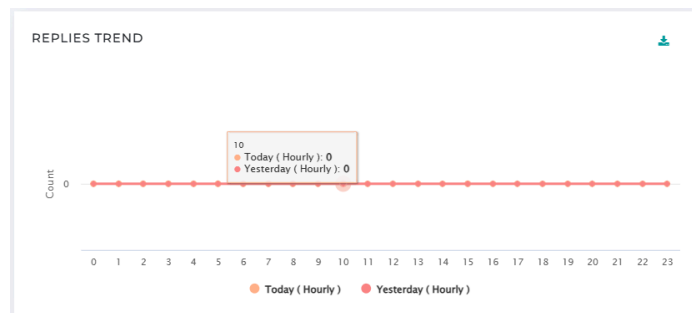
1. **Incoming Messages Trend:** Visualizes the trend of incoming messages over time. This helps identify peaks and valleys in customer communication volume.



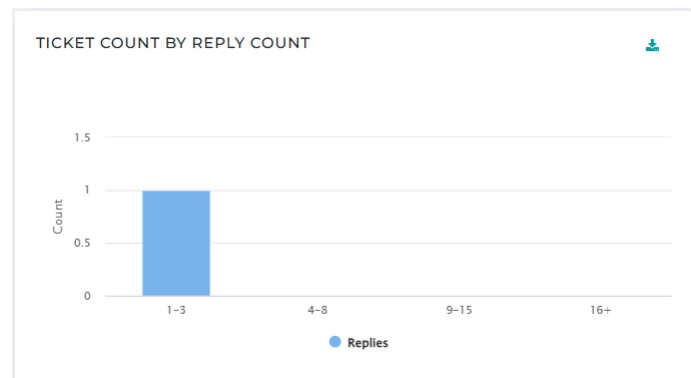
2. **Case Trend:** Displays trends related to case creation and resolution. This allows you to monitor the overall flow and lifecycle of customer cases.



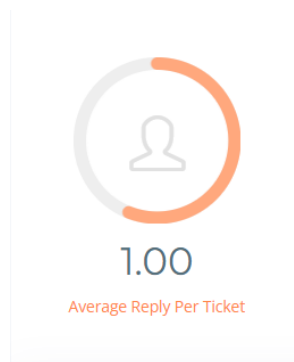
3. **Replies Trend:** Shows the trend of agent replies over time. This metric helps assess agent responsiveness and workload.



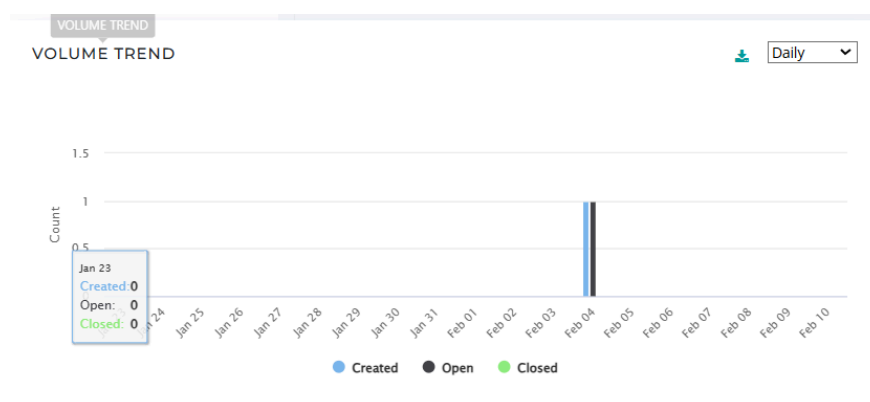
4. **Ticket Count By Reply Count:** Categorizes tickets based on the number of replies they have received. This can highlight tickets requiring more attention or those efficiently resolved.



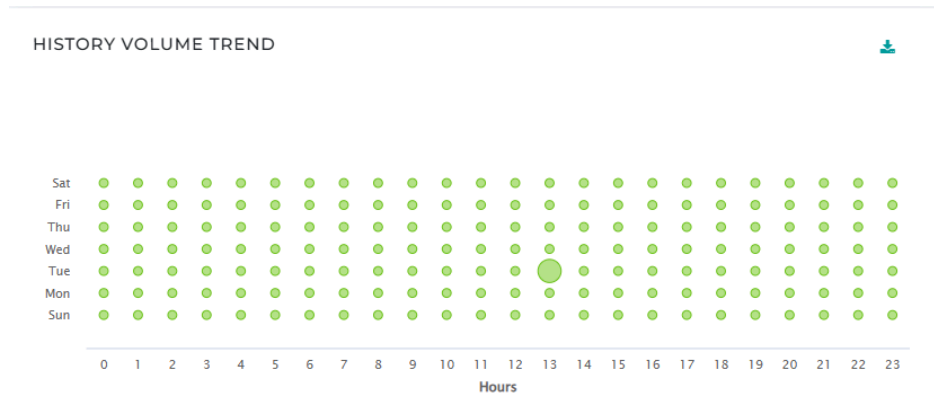
5. **Average Reply per Ticket:** Calculates the average number of replies per ticket. This metric helps evaluate agent efficiency and the complexity of customer issues.



6. **Volume Trend (Daily, Weekly, Monthly, Quarterly):** Breaks down message or case volume by different time intervals (daily, weekly, monthly, and quarterly). This allows for granular analysis of volume fluctuations and identification of seasonal trends.



7. **History Volume Trend:** Shows the historical trend of message or case volume. This provides a long-term perspective on volume patterns and helps with forecasting and resource planning.



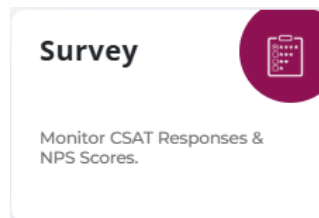
Survey

This guide helps you configure the survey dashboard to see the data you need.

1. Navigate to the **Dashboards** section.



2. Select the **Survey** Dashboard.



3. From the **Survey** dropdown menu, choose the survey you want to analyze.

Select Survey

Zip It Cart Survey ▼

4. If your survey is associated with specific workspaces, select them in the **Workspaces** section.

Select Workspace

All Workspaces ×

5. Use the **Type** filter to specify the kind of survey data you're interested in.

Type

All ▼

6. If you've used tags, you can use them to further filter in the **Tags** section.

Survey Tags

7. Choose the relevant workbaskets or select **All Workbaskets**.

All Workbasket

All Work Baskets ▾

8. Select the start and end dates for your analysis (maximum 30 days) in the **Date Range** section.

Date Range

2025-01-16 00:00 TO 2025-02-10 12:43

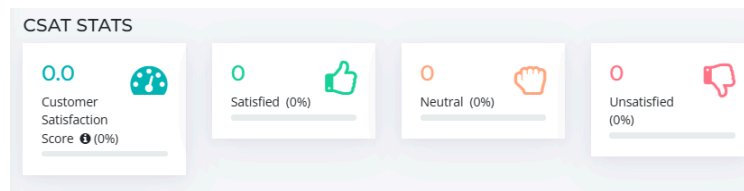
* All stats are based on survey sent date.

9. Once you've made your selections, click the **Go** button to generate your customized dashboard.



Survey Dashabord View

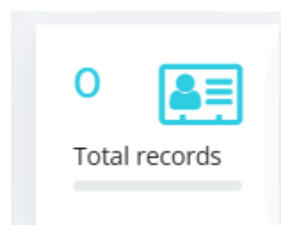
This dashboard provides insights into customer happiness based on survey responses, helping us understand where we excel and where we can improve.



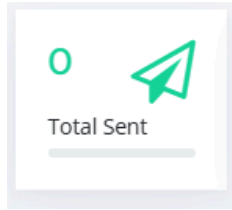
Overall Survey Status

This section tracks the progress of our surveys, showing the total number of surveys sent, viewed, completed, and any issues encountered. It also monitors the effectiveness of reminder emails. Specifically, you'll see:

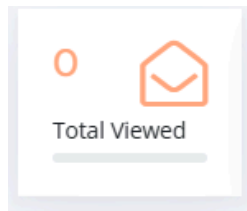
- **Total Records:** The total number of survey records.



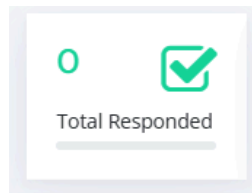
- **Total Sent:** The number of surveys successfully sent.



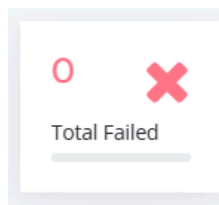
- **Total Viewed:** The number of surveys opened and viewed by customers.



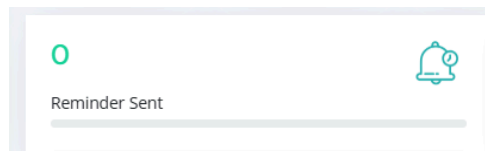
- **Total Responded:** The number of surveys completed and submitted.



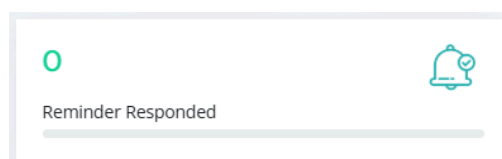
- **Total Failed:** The number of surveys that encountered delivery issues.



- **Reminder Sent:** The number of reminder emails sent to customers who haven't yet responded.



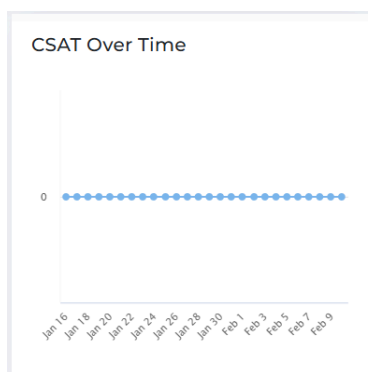
- **Reminder Responded:** The number of surveys completed after a reminder was sent.



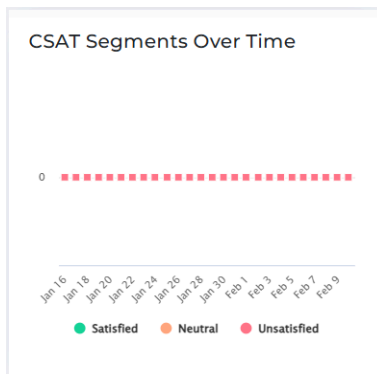
Customer Satisfaction (CSAT) Trends

These charts illustrate how customer satisfaction has changed over time. They show the overall CSAT score and how satisfaction varies across different customer segments.

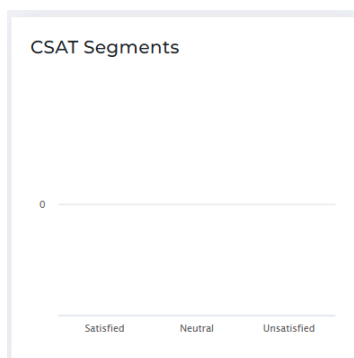
- **CSAT Over Time:** This graph displays the overall trend of customer satisfaction scores over a given period.



- **CSAT Segments Over Time:** This chart breaks down CSAT scores by different customer groups (e.g., demographics, product usage) to identify specific areas of strength and weakness.



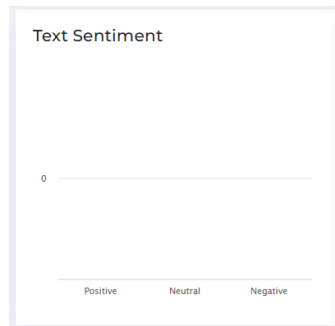
- **CSAT Segments:** This view provides a snapshot of current CSAT scores for each customer segment.



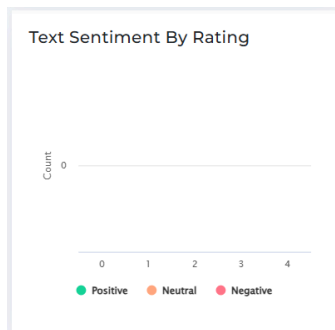
Feedback Analysis

This section analyzes the text feedback provided in surveys to understand customer sentiment.

- **Text Sentiment:** This analysis categorizes feedback as positive, negative, or neutral, providing a high-level overview of customer opinions.



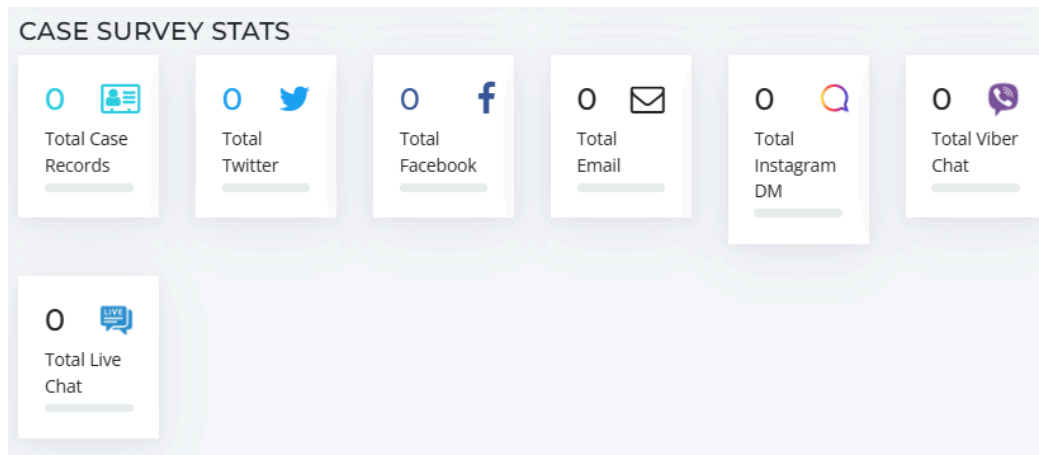
- **Time Sentiment By Rating:** This chart correlates customer ratings with the sentiment expressed in their written feedback, offering deeper insights into the reasons behind different satisfaction levels.



Case Survey Insights

This section focuses specifically on surveys related to customer support cases.

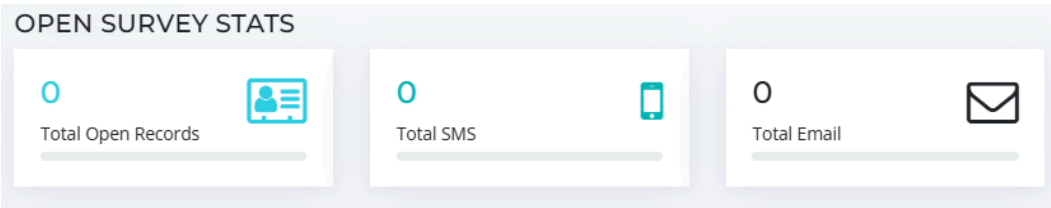
- **Case Survey Stats:** Key metrics related to case surveys, such as the number of surveys sent and response rates.
- **Case Survey Trend:** Trends in customer satisfaction with support cases over time.
- **Responses:** Access to individual customer responses for case surveys.



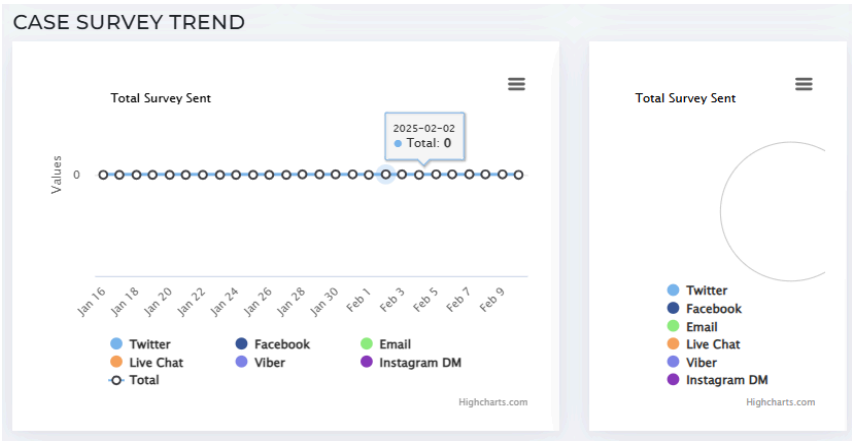
Open Survey Insights

This section tracks the progress and responses for any currently active surveys.

- **Open Survey Stats:** Key metrics for active surveys, including the number of responses received.



- **Case Survey Trend:** Trends in responses for active surveys.



- **Responses:** Access to individual customer responses for active surveys.

RESPONSES

Type Source User Details Value Status

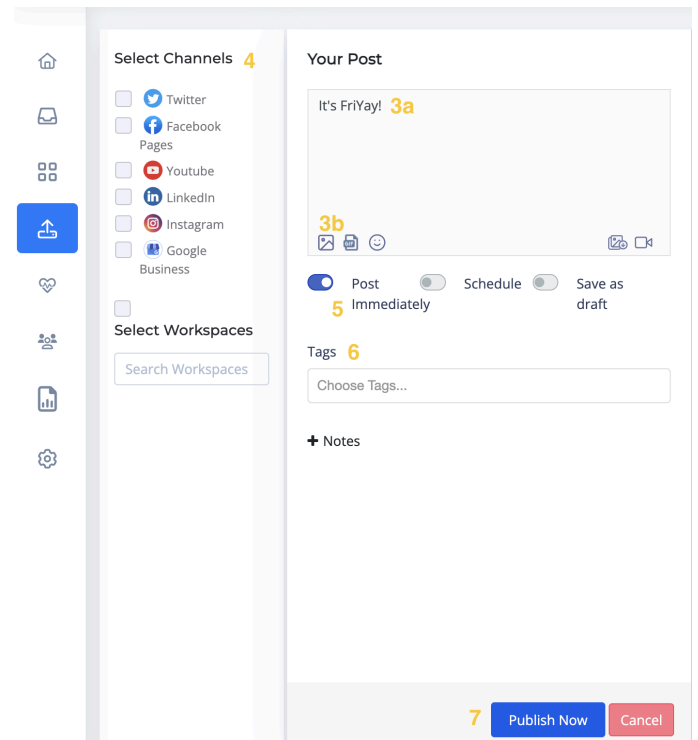
* All stats are based on survey sent date.

Publish

The Publish Icon is where to go to publish content to social sites. Here, you can create and schedule posts to be shared on your social and review sites either individually or to all sites at the same time.

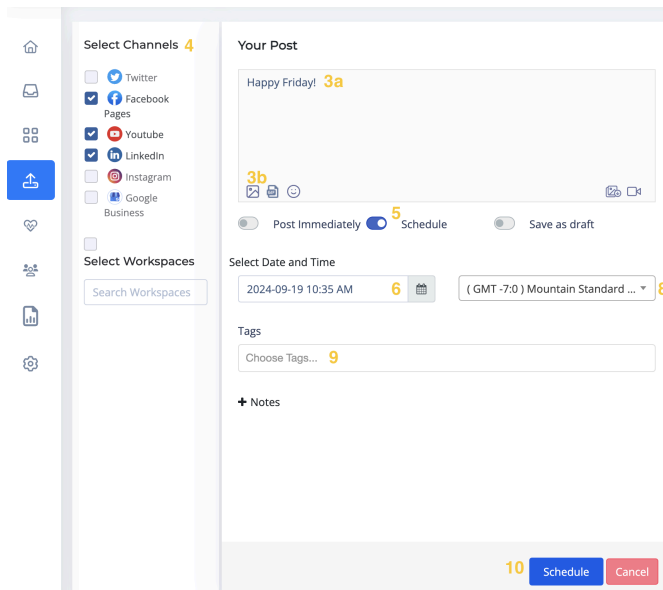
Publishing a Post Immediately

1. Select **Publish** from the main menu.
2. Select **Compose** to start creating a new post.
3. Click into the "**What would you like to share?**" field to begin typing your message.
 - a. Type your message.
 - b. If desired, add an image, file, or emoji to enhance your post.
4. Select the channels where you want to publish this content (e.g., Facebook, X, etc.)
5. Keep Post Immediately toggled on.
6. Click into the **tags area** and add any relevant tags to help categorize and organize your posts.
7. Select **Publish** to share your post immediately.



Scheduling a Post for Later

1. Select **Publish** from the main menu.
2. Select **Compose** to start creating a new post.
3. Click into the **What would you like to share?** field to begin typing your message.
 - a. Type your message.
 - b. If desired, add an image, file, or emoji to enhance your post.
4. Select the channels where you want to publish this content (e.g., Facebook, X, etc.)
5. Toggle **Schedule** to enable scheduling options
6. Select the **calendar** icon to choose a publishing date.
7. Select the date you want the post to go live.
8. **Update the time** if you need to adjust the specific publishing time.
9. Click into the **tags area** and add any relevant tags to help categorize and organize your posts.



10. **Select Schedule** to confirm your scheduled post.

Survey

This guide walks you through creating and customizing surveys to gather valuable customer feedback.

Create a new survey

The screenshot shows a web interface for creating a new survey. At the top, there's a header with 'SURVEY' and a breadcrumb 'MANAGE SURVEY / CREATE'. Below this, the form has several fields: 'Survey Name*' with a text input containing 'Post Chat Survey' (labeled 3); 'Brand Logo URL' with a text input (labeled 4a); 'Survey Description' with a large text area (labeled 4b); and 'Survey Type' with a dropdown menu showing 'CSAT' (labeled 5). A red asterisk note below the dropdown says '* Change in this field is not allowed after saving. Please select carefully.'

1. Select **Survey** on the left-side toolbar.
2. Select **+Create**.
3. Enter a **Survey Name** in the Survey Name text box.
4. Enter other relevant fields. The following are optional:
 - a. **Brand Logo URL:** The URL of your company logo to display on the survey.
 - b. **Survey Description:** A brief description of the survey's purpose.
5. For the **Survey Type** drop-down menu. Here you can embed survey options to populate once the chat has been completed:
 - **CSAT**- Customer Satisfaction
 - **NPS**- Net Promoter Score
 - **CUSTOM**- Design your own questions
 - **CUSTOMUI**- Design your own survey with a custom user interface

The bottom section of the form includes 'Survey Url Validity In Days*' with a text input containing '6' (labeled 6). Below this, there are three inputs: 'Send Maximum' with a text input containing '7a' (labeled 7a), 'Survey(s) In' with a text input containing '7b' (labeled 7b), and 'Repeat Sending Survey To Same User After' with a text input containing '7c' (labeled 7c). The text '(Days).' follows the last input.

6. Enter how many days the survey URL should be valid for in the **Survey URL Validity in Days** text box.

7. Limit the frequency of surveys sent to the same user by completing **Send Maximum Survey(s) In (Days)**.

a. **Send Maximum ___ Surveys:** Set how many surveys total should be sent.

b. **In ___ days:** If more than once, set the frequency the survey be sent.

c. **Repeat Sending Survey to Same User after ___ Days:** Set the time interval before a user receives the survey again.

Sources*

8

Survey Trigger Configuration

Action States

Soft Close 9

Days 0 Hours 0 Minutes 0

8. To make a survey live, ensure that the **Sources** in the Survey is Live Chat in the correct Workspace. You can select more than one source.

9. **Survey Trigger Configuration Action States** define what happens to the chat session *after* the survey trigger conditions have been met and the survey has been sent. These states control the flow of the conversation following the survey prompt, giving you options for how to manage the interaction with the customer.

- **Close:** The chat session is automatically terminated once the survey is sent. This is useful if you want to gather feedback without further interaction.
- **Soft Close:** The chat remains open for a specified duration after the survey is sent. This allows the customer to provide additional feedback or ask questions if they choose. After the set time elapses, the chat will automatically close.
- **Ignore:** The survey is not sent, and the chat continues as normal. This might be useful for testing triggers or in situations where you want to selectively send surveys based on other criteria.

XBert Tip: These action states do not directly control the trigger itself (i.e., what causes the survey to be sent). The trigger conditions are defined separately based on the selected source (e.g., Live Chat, Email) and any specific rules or criteria you set.

10. Choose whether **Twitter authentication** is needed to take the survey.

11. Select options for how you want the survey to be sent:

a. **EMAIL**

- i. Type a Subject for the Email in the **Subject for Email** text box.
- ii. Select relevant font options.
- iii. Type the email in the larger text box.
- iv. Enter placeholder text if desired.

☒ **EMAIL**

Subject for Email

Were eager to know what you think about us

Note: You can use the following placeholders in the reply template.

(Source) = The messages that were actually originated from social like Facebook, Twitter, etc.
(TicketID) = A unique ID that is auto-generated for every message captured in the tool
(name) = Social name of the customer who has sent a message
(CustomerID) = A unique Social Channel ID that is auto-generated for Customers who sent the message.
(UnsubscribeLink) = Link to unsubscribe the Survey

Email Template

A Normal text ▾ Black ▾ Bold Italic Underline

A Normal text ▾ Black ▾ Bold Italic Underline

{name}, please find our Survey {{link}} here

- b. **CASE** allows you to select case by case times you would like to send the survey. Enter the text in the cases the survey should be sent from.

☒ **CASE**

Workspaces

Note: You can use the following placeholders in the reply template.

(Source) = The messages that were actually originated from social like Facebook, Twitter, etc.
(TicketID) = A unique ID that is auto-generated for every message captured in the tool
(name) = Social name of the customer who has sent a message
(CustomerID) = A unique Social Channel ID that is auto-generated for Customers who sent the message.
(UnsubscribeLink) = Link to unsubscribe the Survey

Twitter Template

{name}, please find our Survey {link} here

Email Header Template

{name} Greetings.

Email Template

A Normal text ▾ Black ▾ Bold Italic Underline

A Normal text ▾ Black ▾ Bold Italic Underline

{name}, please find our Survey {link} here

XBert Tip: The case here should match the source selected in the Sources drop-down menu.

12. Select **Next**.

Audience

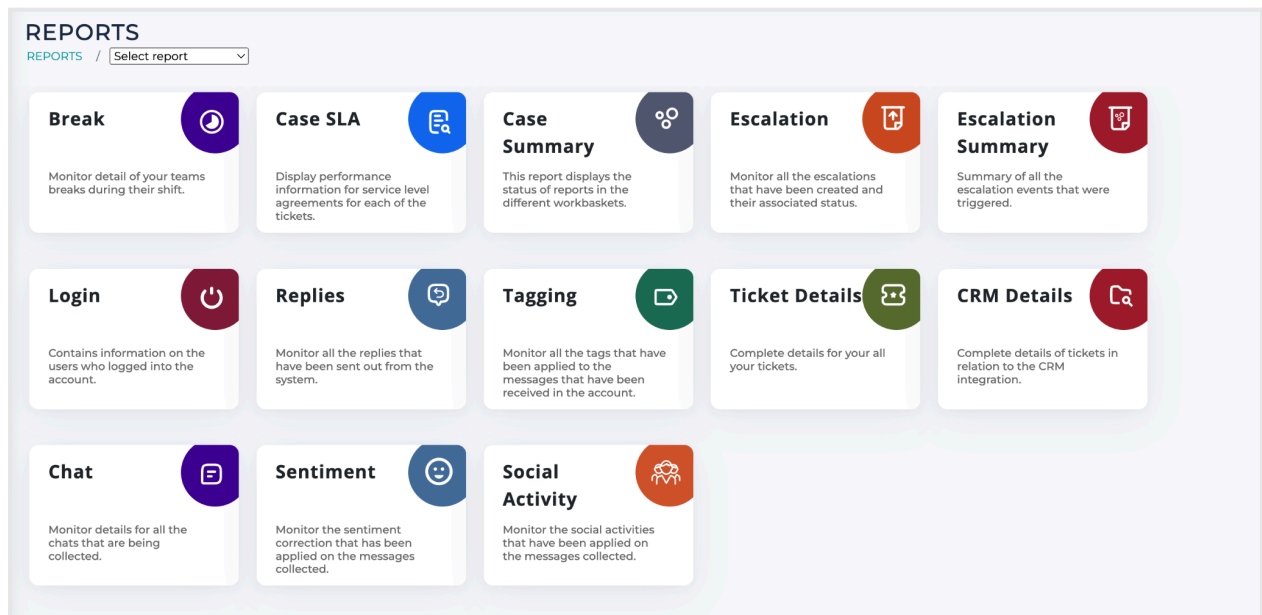
The Audience section in NextivaCX acts as a centralized database for all your customer contacts. It automatically collects information from customer interactions across all your connected channels, allowing you to build a comprehensive understanding of your audience.

Key Features and Benefits

- **Centralized Contact Management:** View and manage all your customer contacts in one place, regardless of which channel they interacted with you on.
- **Create New Contacts:** Add new contacts to your database, ensuring you have a complete record of your customer relationships.
- **Data Export:** Download your contact list in Excel format for further analysis or integration with other systems.
- **Merge Duplicate Contacts:** Easily identify and merge duplicate contacts to keep your database clean and organized.
- **Powerful Filtering:** Filter your contacts based on various criteria such as creation date, source, location, and more, making it easy to find the information you need.
- **Advanced Segmentation:** Create custom contact types, properties, and segments to tailor your marketing and communication efforts.

Report

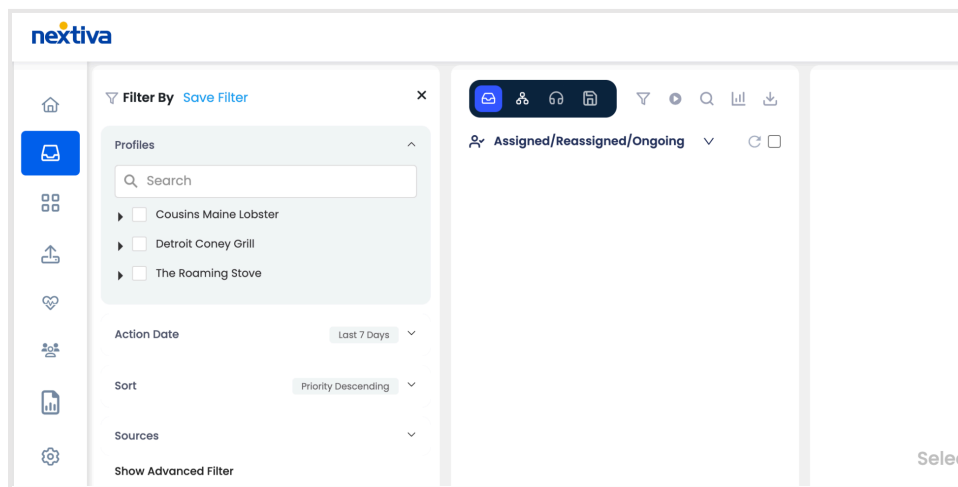
The Report icon directs you to organized reports for easy access. These reports can be exported for use outside of the platform. Account Owners and Admins have access to several pre-configured reports to gather additional information.



Unibox

The Unibox is your command center for managing all your customer conversations in NextivaCX. It's where you'll see and respond to messages, live chats, replies, comments, and more, all in one place.

Once you connect a channel (like social media, email, or chat) to NextivaCX, all interactions from that channel will appear in your Unibox. This means you have a single, unified view of your customer communications, no matter where they originate.



What's an Interaction?

An **interaction** is any communication between your business and a customer, whether it's a message, a live chat conversation, a reply to a comment, or any other form of engagement.

Accessing the Unibox



1. Log in to NextivaCX.
2. Select the Unibox icon from the left toolbar.

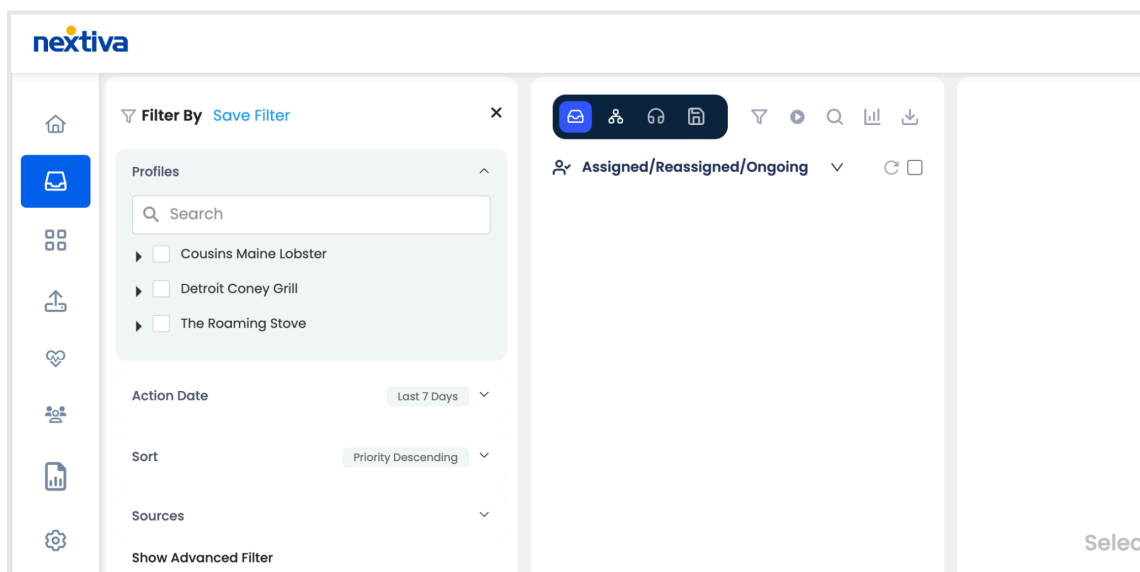
How Interactions Appear

Each new interaction is automatically assigned a unique case number.

You'll see these interactions in the Assigned/Reassigned/Ongoing section of your Unibox.

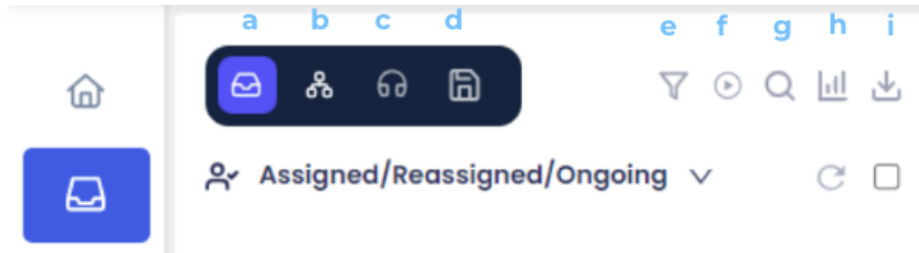
You'll only see the cases you have access to, have worked on, or are associated with the workspaces you belong to.

The Unibox displays interactions from all the workspaces you have access to, giving you a comprehensive view of your customer communications.



Managing Conversations

Once inside the Unibox, filter information will display along with interactions based on the User view selected. The Unibox defaults to display the first predefined view, showing all interactions the User has been assigned or involved in.



- a. **My view/agent view:** This will show tickets you have access to.
- b. **All Cases within the User's Profile:** See all open cases across all the profiles you have access to.
- c. **Listening Tab:** This allows you to view all the data that has been collected in the profiles the User has access to.
- d. **Saved Filter:** Access any custom filters you've created or that have been shared with you, allowing you to quickly find specific types of interactions.

You can further refine your view by applying additional filters or using the search function:

- e. **Filter:** Narrow down the displayed information by selecting specific categories or criteria.
- f. **Playmode:** Create a dedicated workspace to focus solely on incoming interactions assigned directly to you.
- g. **Search:** Quickly find specific tickets or keywords within your interactions.
- h. **Message Statistics:** Get a snapshot of the overall health of your case queue, including a breakdown of how many cases are in each workflow status.
- i. **Download:** Export the displayed data to an XLS file for further analysis or record-keeping.

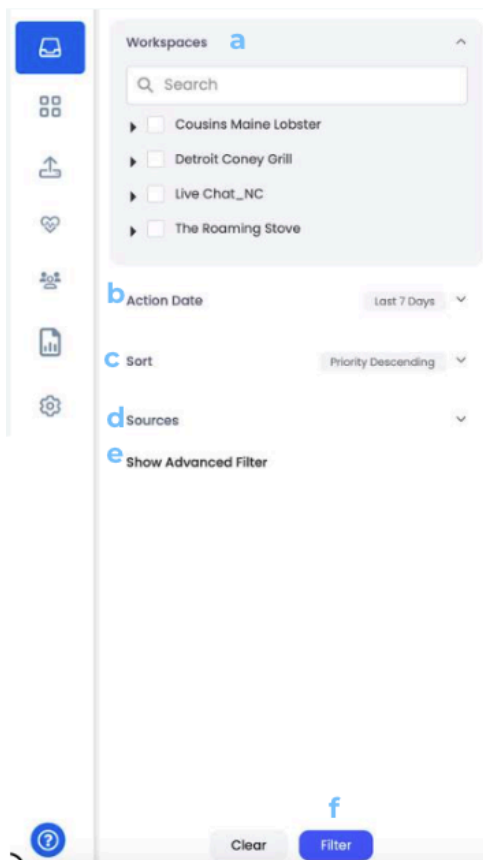
Take Control of Your Conversations

With these filtering and viewing options, you can tailor the Unibox to your workflow and ensure you're always on top of your customer interactions.

Filtering the Unibox

Once you've chosen a predefined view in the Unibox, you can further refine the displayed cases using various filters.

1. Select the desired filter(s) from the available options.
2. Click the **Filter** button to apply your selections. The filtered results will then be displayed in the Unibox.



- a. **Workspaces:** See interactions from specific workspaces you have access to. This helps you focus on relevant customer conversations.
- b. **Action Date:** Filter interactions based on when they were last updated, acted upon, or had a new message created. This lets you prioritize recent or overdue conversations.
- c. **Sort:** Arrange your interactions by priority, case creation date, case action date, or other criteria to suit your workflow.
- d. **Sources:** Filter by the channel the interaction originated from (e.g., Facebook, email, live chat).
- e. **Advanced Filter:** Access a wide range of additional filters to precisely target the interactions you want to see.

Saving Filters

While filtering interactions, the filter can be saved for future quick use.

1. To save a filter currently in use, select **Save Filter**.



2. Complete the details:

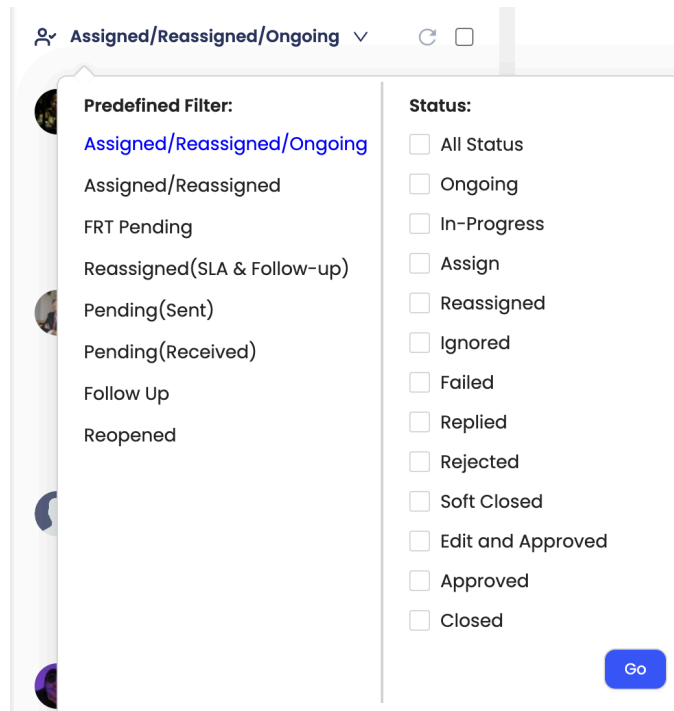
- a. **Filter Name:** Give your filter a descriptive name so you can easily identify it later.
- b. **Share this filter with:** If you want to share this filter with other NextivaCX users, enter their email addresses in this field.
- c. **Action Date:** Choose a specific timeframe to filter interactions based on when they were last updated, acted upon, or had a new message created. Use the dropdown menu in the Action Filter to further refine your selection by specific actions.
- d. **Auto Refresh:** Toggle this option on if you want the filter to automatically update and show new interactions that meet the criteria. If toggled off, the filter will only show the data that existed at the time it was created.

A screenshot of a 'Save Filter' dialog box. It has a title bar with 'Save Filter' and a close button. The form contains: a 'Filter Name' text input field; a 'Share this filter with' section with a 'Search Users' text input and a list of users, including 'caitlin.moore@nextiva.com'; an 'Action Date' section with a dropdown menu currently set to '1 day'; an 'Allow auto refresh' toggle switch; and 'Cancel' and 'Save' buttons at the bottom right. Blue letters 'a', 'b', 'c', and 'd' are overlaid on the form to correspond with the list items.

3. Select the **Save** button to save your filter for future use.

Selecting Interactions from the Unibox

1. Interactions listed represent cases. These can be arranged and filtered by selecting Assigned/Reassigned/Ongoing.



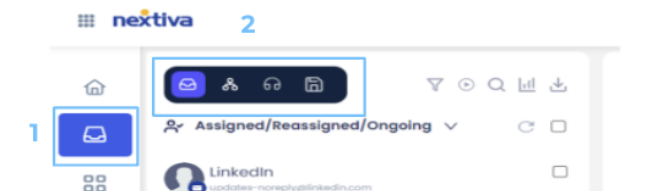
The screenshot shows a filter menu for the Unibox. At the top, there is a header bar with a search icon, the text "Assigned/Reassigned/Ongoing" with a dropdown arrow, a refresh icon, and a checkbox. Below this, the menu is divided into two columns. The left column is titled "Predefined Filter:" and lists several options: "Assigned/Reassigned/Ongoing" (highlighted in blue), "Assigned/Reassigned", "FRT Pending", "Reassigned(SLA & Follow-up)", "Pending(Sent)", "Pending(Received)", "Follow Up", and "Reopened". The right column is titled "Status:" and lists 15 status options, each with a checkbox: "All Status", "Ongoing", "In-Progress", "Assign", "Reassigned", "Ignored", "Failed", "Replied", "Rejected", "Soft Closed", "Edit and Approved", "Approved", and "Closed". A blue "Go" button is located at the bottom right of the menu.

2. Once filters have been selected and/or the case status selected, select Go.
3. Select an interaction from the Unibox.
4. Case information will be displayed. The interaction will be displayed in the middle of the screen and the case details on the right.

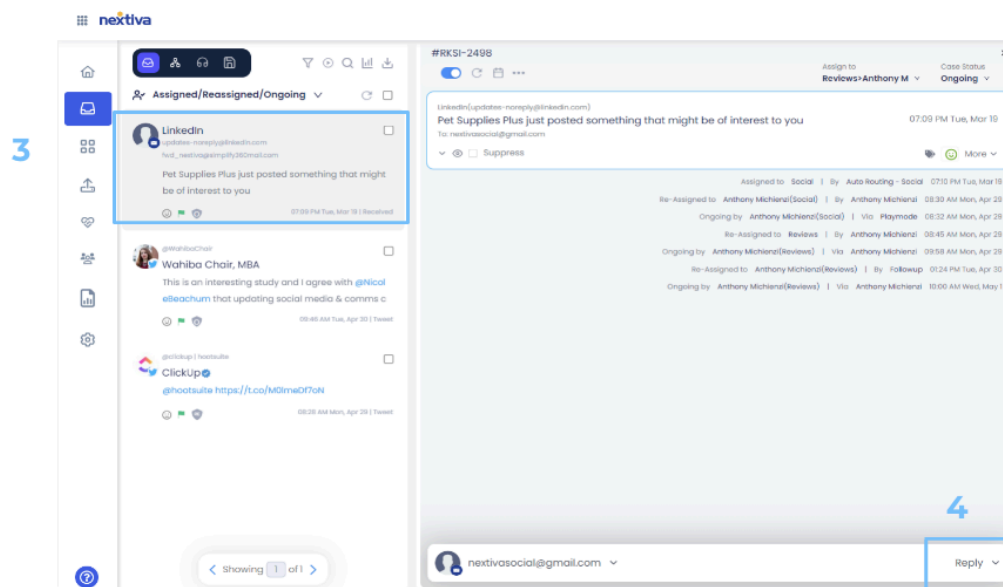
Responding in the Unibox

Users are able to reply directly to interactions from many different channels from inside the Unibox. To reply to an interaction, follow the steps below.

1. Select the Unibox icon on the left side of the screen.
2. Next, choose which Unibox view you would like to use.



3. Select the interaction you would like to respond to.
4. Select **Reply** at the bottom of the screen.



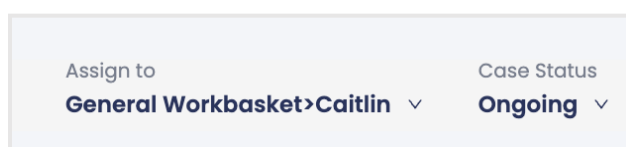
XBert Tip: The reply box may differ depending on which social media platform you are responding to.

Changing the Case Status in the Unibox

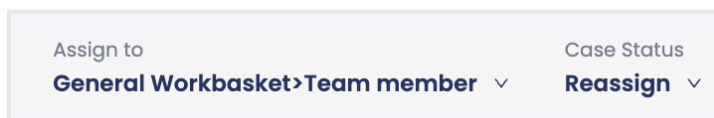
Once you've reviewed and addressed a case in the Unibox, it's important to update its status to reflect the current situation. This helps you and your team stay organized and track the progress of each customer interaction.

How to Change Case Status:

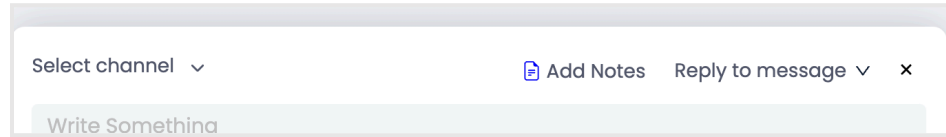
1. **Locate the Case:** Find the case you want to update in the Unibox.
2. **Select the Case Status Dropdown:** Click on the dropdown menu next to the current case status.



XBert Tip: You can only change the status of cases assigned to you. If a case is assigned to someone else, you'll see the option to **Reassign** it instead.



3. **Choose the New Status:** Select the appropriate status from the list:
 - a. **Ongoing:** The case requires further attention or action.
 - b. **Soft Close:** The case has been resolved, but a follow-up may be necessary. Soft-closed cases will automatically close after 24 hours.
 - c. **Ignore:** The case is not currently being addressed, but it's not fully closed. It won't be considered ongoing or in progress.
 - d. **Close:** The case has been fully resolved. Any new interaction from the same customer will create a new case. You can find closed cases by filtering for the "Closed" status in the Unibox.
 - e. **In-Progress:** The case is currently being worked on by an agent.
4. *To successfully change the status, you must also add a note explaining the reason for the change. After selecting the new status, select **Add Notes**.*



Select channel ▾

 Add Notes Reply to message ▾ ×

Write Something

5. Enter a brief note describing the action taken or the reason for the status change.
6. Select **Save** to update the case status and add the note to the case history.

Playmode

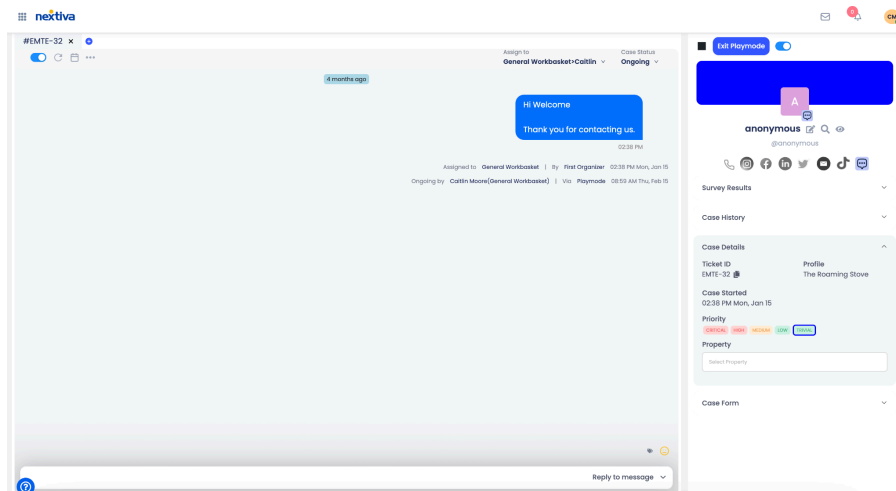
Playmode is your dedicated workspace for handling a high volume of incoming customer interactions efficiently. Think of it as an automatic distribution center that assigns new interactions to you in real-time, so you can focus on providing timely responses and delivering outstanding customer service.

Once you're in Playmode, you can manage multiple interactions simultaneously. The Unibox transforms into a dynamic workspace where you can juggle up to four active conversations at once, ensuring no customer is left waiting.

Accessing Playmode



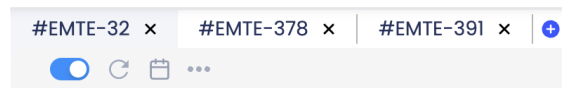
1. Go to the **Unibox**.
2. Select the **Play** icon at the top.
3. The Unibox will switch to the Playmode view.



- a. The oldest unassigned case will automatically appear first.
 - b. Case details are on the right side of the screen and the interaction is in the middle.
4. You can respond directly to the interaction by selecting **Reply to Message**.

Navigating Through Cases in Playmode

1. Go to the **Unibox**.
2. Select the **Play** icon at the top.
3. The Unibox will switch to the Playmode view, and an open case will automatically appear.
4. Work with Multiple Cases:



- **Add a case:** To work on another case simultaneously, select the **plus +** button.

XBert Tip: You can interact with up to four open cases at the same time.

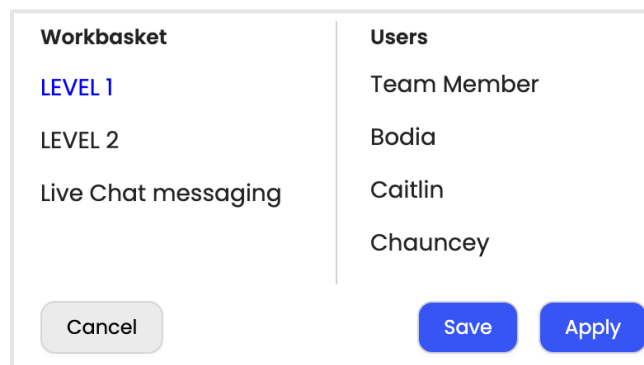
- **Switch between cases:** Select the corresponding **tab** at the top of the screen to navigate between your open cases.
- **Close a case:** When you're finished with a case, select the **X** on its tab to close it. Continue to work the remaining cases you have open, or add another case. There will always be one case displayed by default until all cases are closed.

Assigning Cases in Playmode

1. Cases are assigned to Users in Playmode by rule creation through the organizer feature found in settings.
2. Once rules are set up, the case will be automatically assigned.



3. To change the case assignment, select the drop down under assign to.
4. Other Workbaskets and Users attached to the workbaskets will display. Workbaskets are teams/groups of Users that have been created.
5. Select a specific **User** or entire **Workbasket** to assign.
6. Select **Apply**.

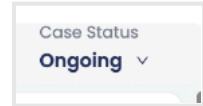


7. A popup will appear, asking for confirmation.
8. Select **Yes**.

Changing the Case Status in Playmode

Updating the status of a case in Playmode helps you keep track of its progress and ensures your team stays organized.

1. **Locate the Case Status Dropdown:** In Playmode, find the case you want to update. Look for the dropdown menu labeled "Case Status" within the case details on the right side of the screen.



2. **Select the New Status:** Click on the dropdown and choose the appropriate status from the list:

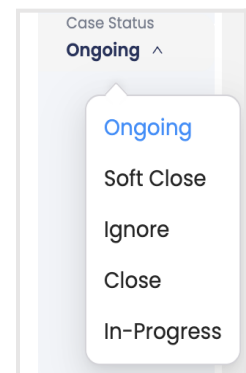
Ongoing: The case requires further attention or action.

Soft Close: The case has been resolved, but a follow-up may be necessary. Soft-closed cases will automatically close after 24 hours.

Ignore: The case is not currently being addressed, but it's not fully closed. It won't be considered ongoing or in progress.

Close: The case has been fully resolved. Any new interaction from the same customer will create a new case. You can find closed cases by filtering for the "Closed" status in the Unibox.

In-Progress: The case is currently being worked on by an agent.



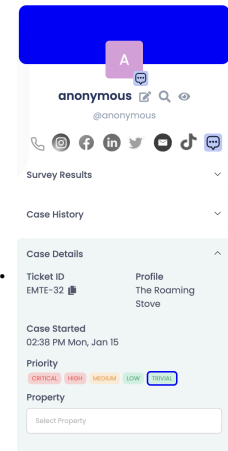
3. After selecting the new status, select **Add Notes**.
4. Briefly explain the action taken or the reason for the status change. This helps keep everyone on your team informed.
5. **Select Save** to update the case status.

XBert Tips:

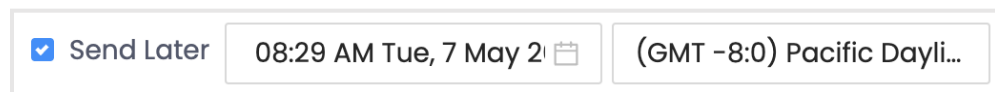
- You can only change the status of cases that are assigned to you. If a case is assigned to someone else, you'll see the option to **Reassign** it instead.
- Adding a note is mandatory when changing the case status.
- Regularly updating case statuses in Playmode keeps your workflow streamlined and ensures that no customer inquiries fall through the cracks.

Responding to Cases in Playmode

1. A case will automatically display in play mode.
2. Read the customer's message in the middle of the screen.
3. Confirm the relevant case details on the right side of the screen.
4. Select **Reply to Message** at the bottom of the screen.



5. Enter your message in the text box.
6. **Send or Schedule:**
 - To send your reply immediately, select **Reply**.
 - To schedule your message for later, select **Send Later** and choose the desired date and time.



7. Once you've sent or scheduled your reply, update the case status to reflect the current situation (e.g., Ongoing, Soft Close, Close).
8. Add a note explaining the status change.

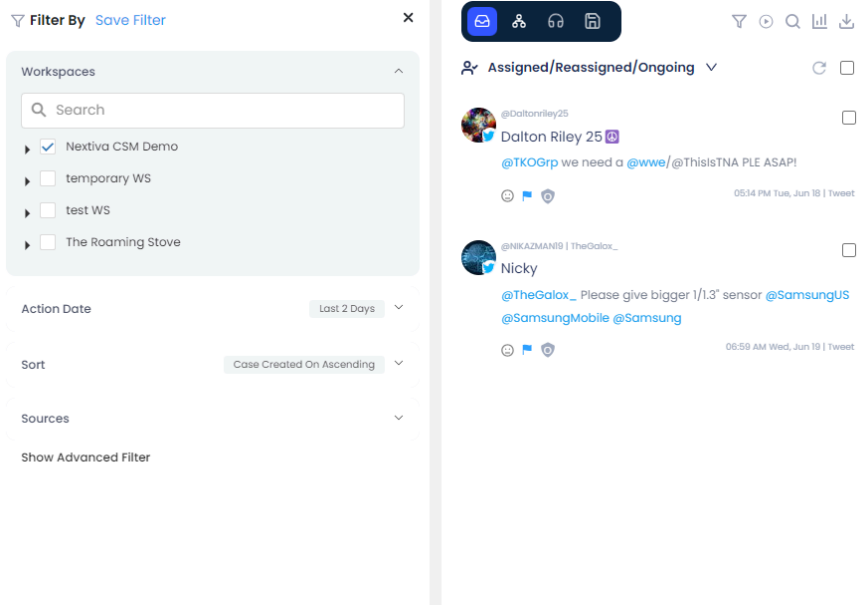
XBert Tips:

- You can work on up to four cases simultaneously in Playmode. If you close a case and have others open, you can continue working on those or select the plus symbol (+) to add another case to your view.
- If you close the only open case in Playmode, a new case will automatically be opened for you, ensuring you're always working on the next customer interaction.

Filtering Playmode

You can filter the tickets which will be open in the Playmode.

1. Select a workspace.
2. Adjust the four filters to select the desired date range or source, or other criteria.
3. As shown on the screenshot here, the Playmode would open only the 2 interactions.



Exit Playmode

1. When you are ready to leave playmode, select the pause button to stop new cases from coming your way.
2. Select **Exit Playmode**.
3. A popup will display requesting the reason for exiting playmode. Select the best reason.

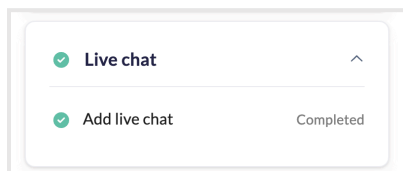
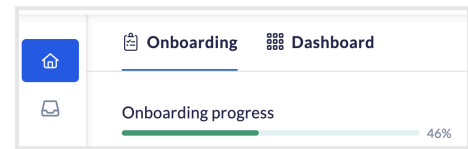
A confirmation dialog box titled 'Confirm' with a close button (X). It contains a text input field with the placeholder 'Please select reason for exiting play mode*'. The field has a dropdown arrow and currently shows 'Lunch Break'. At the bottom, there are two buttons: 'Yes' (red) and 'No' (grey).

4. Select **Yes** to be directed back to the Unibox.

Live Chat

Setting up Live Chat

1. Navigate to the Onboarding Menu by:
 - a. Selecting the **Home** Icon
 - b. Selecting the **Onboarding** Tab
2. From the Onboarding Menu, select **Live Chat**.
3. Select **Add Live Chat**.



4. Live Chat Settings will appear. Enter all settings.
 - a. **Brand Name:** Enter the name that appears in the Live Chat header. Example, business name.
 - b. **Select Logo:** Upload a photo that you would like displayed on the Live Chat header. This can be an emblem.
 - c. **Select theme:** This is the color the chat will appear.
 - d. **Select font:** This is the font used in the Live Chat.

Add live chat to your website

Give customers a new way to connect with you.

Brand Name

The Roaming Stove

Select Logo



Select theme

#54687F

Select font

Lato

Publish Live Chat

<!-- Start of Nextiva Widget script -->
<script src="https://d4cq8fw7kph8i.cloudfront.net/Simplify360Chat.js?key=dkJuR2VQZldrbVtk9"></script>
<!-- End of Nextiva Widget script -->

Copy & paste code before </body> tag on each page where you want the widget to appear.

Copy Code

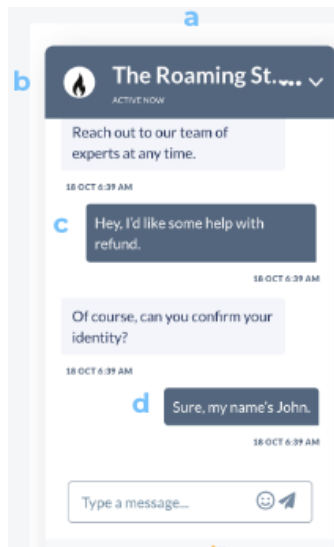
Send To Developer

Advance Options

6. When finished, select **Publish Live Chat**.

Live Chat Example

To see how the settings look in the Live Chat, view the examples below.



- a. **Brand Name:** The name that appears in the Live Chat header. In this example, The business name, The Roaming Stove, was used.
- b. **Select Logo:** Upload a photo that you would like displayed on the Live Chat header. In this example, a fire emblem was uploaded.
- c. **Select theme:** This is the color the chat will appear. In this example, the color selected was gray.
- d. **Select font:** This is the font used in the Live Chat. In this example, the font selected was Lato.

Inserting the Chat URL into a Website

After configuring your Live Chat settings in NextivaCX, it's time to embed it into your website. You'll find a code snippet at the bottom of the Live Chat settings page. Adding this code correctly to your website will make the Live Chat widget appear for your visitors.

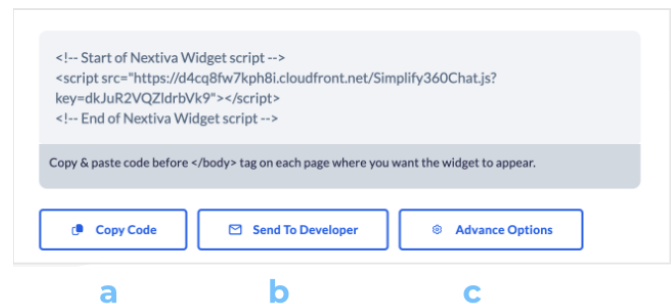
1. Select **Publish Live Chat** to ensure the code is active and ready to use.

2. **Select the Code**

- a. Select **Copy Code** to copy the entire code snippet accurately.

- b. If you have a web developer, select **Send to Developer**. A popup will appear where you can enter their email address, and we'll send them the code and instructions.

- c. For advanced customization and installation methods, navigate to **Advanced Options** and select **Installation**.



3. Go to your website's content management system or HTML editor.
4. Paste the copied code into the page where you want the Live Chat widget to appear.
5. Once you've added the code, your Live Chat widget should be visible on your website, ready to engage your visitors in real-time conversations.

XBert Tips:

- The exact steps for inserting the code may vary depending on your website platform or content management system. Some websites may have a Nextiva plugin that simplifies the process.
- If you're unsure how to add the code, consult your web developer or refer to your website platform's documentation for assistance.

Wix

You can easily add Nextiva Live Chat to your Wix website by using the custom code feature found under settings:

1. Go to [Settings](#) in the site dashboard.
2. Select the **Custom Code** tab in the Advanced section.
3. Select **+ Add Custom Code** at the top right.
4. Paste the code snippet in the text box.
5. Enter a name for your code.

XBert Tip: Name it Nextiva LiveChat or something similar to easily identify it later.

6. Choose which pages to place the Live Chat by selecting one of the following options under Add Code to Pages:
 - a. **All pages:** This adds the code to all of your site's pages, including any new pages that you create in the future. Choose whether to load the code only once per visit, or on each page your visitor opens.
 - b. **Choose specific pages:** Use the drop-down menu to select the relevant pages.
7. Choose where the code is placed by selecting **Head** under the Place Code in section.
8. Select **Apply**.

Square Space

Nextiva Live Chat can be easily added to a squarespace website by using the code block feature.

XBert Tip: Adding JavaScript or iframes to code blocks is a [premium feature](#) available in Business, Commerce, Professional, and Premium plans.

Add a code block

To add a code block:

1. Edit a page or post, click Add Block or an insert point, then click Code. For help, visit [Adding content with blocks](#).
2. Open the block editor by clicking the pencil icon on the block.
3. [Add your code](#) in the text field.
4. If you're using the code block to [display code snippets](#), switch the Display Source toggle on.

Add code

If the code block is being used to render code, ensure HTML or Markdown is selected in the Type menu. To do this:

1. Enter or paste the code into the text field.
2. To paste code, copy the code.
3. Select into the field and press Ctrl + V (Windows) or Command + V (Mac).

Code blocks set to CSS or JavaScript [display code as text](#) by default. To render CSS or JavaScript in code blocks, select HTML from the drop-down menu. For CSS, surround the code with `<style> </style>` tags. For JavaScript, surround the code with `<script> </script>` tags.

Wordpress

If WordPress is used for the Website Nextiva Live Chat can be installed through the plugin found here: <https://wordpress.org/plugins/nextiva/>

XBert Tip: Instead of copying and pasting the entire javascript code, only the key and the URL need to be entered

To insert the chat URL into a Wordpress website, follow the steps below.

1. Select **Advanced Options**.
2. From the Advanced Options Menu, select **Installation**.
3. Select the **Wordpress** tile.

GoDaddy

To insert the chat URL into a GoDaddy website, follow the steps below.

1. Go to the GoDaddy [product page](#).
2. Scroll to Websites + Marketing and select **Manage** next to the site name.
3. Select **Edit Website** or **Edit Site** to open the website builder.
4. Go to the page and location where the website should be added. This is where to add the custom code and [add a section](#).
5. Search for the HTML section and select **Add**.
6. Paste or write your custom code in the Custom Code field.
7. Customize the rest of the section, such as the accent color, title, center alignment toggle and height.

XBert Tip: Leave the Forced Height field blank for auto-height or set a specific height in pixels. A height of 0 pixels is equivalent to [deleting the section](#).

8. Your changes are saved automatically.

XBert Tip: Use Preview to see the results.

9. When you're ready to make the changes public, [publish your site](#).

Live Chat Advanced Settings

There are many different Live Chat Advanced Settings that can be configured.

General: The general tab of Live Chat allows you to name how your chat is displayed in the Unibox and also edit your brand name and logo.

Appearance: Change the look and feel of your Live Chat with customization tools. Choose left or right hanging placements, theme colors, button sizes, and fonts.

Getting Started: Allows you to provide a label message over the Live Chat widget. *Example: “Hello, how can we help you today?”*

Pre-Chat Questionnaire: This can be used to collect information before Live Chat begins. You can set up questions to capture lead contact info or to identify the customer in advance of the conversation.

Post Chat Survey: With this feature, you can embed the CSAT or NPS survey to populate once the chat has been completed.

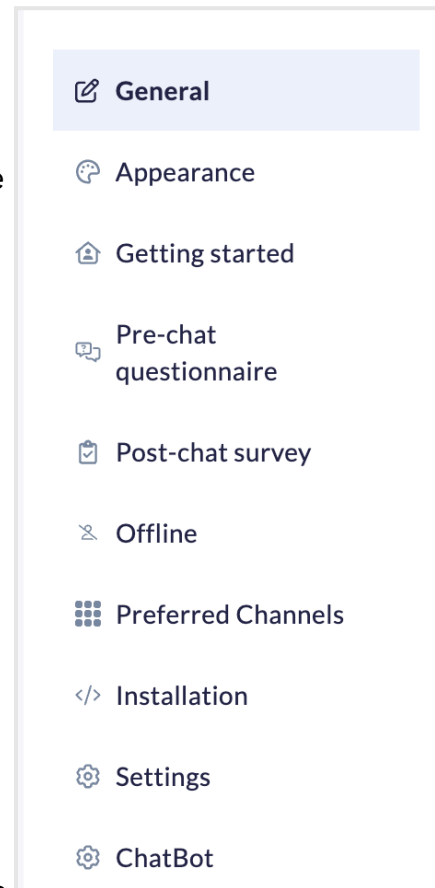
Offline: Live Chat is available 24/7 unless business hours are enabled. You can set business hours letting their customers know that they won’t be able to respond right away. Customers can still submit cases during off hours.

Preferred Channels: Enables you to choose their preferred conversation channel beyond just the website chat. This could include messaging apps, sms and more.

Installation: Provides you with instructions on how to add live chat to their website.

Settings: Provides you with more customization, including enabling user session history, notifications, chat transcripts, attachment options and more.

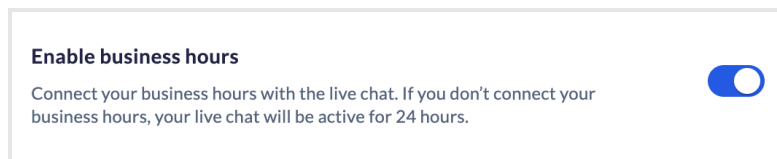
ChatBot: Provides the ability to enable the Chatbot into Live Chat.



Setting Up After Hours

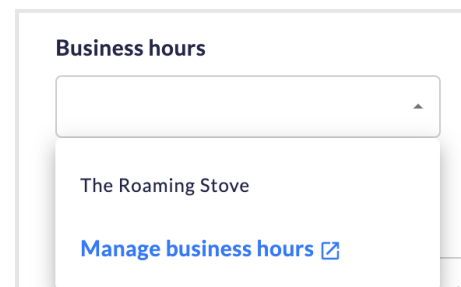
The 'After Hours' feature lets you automatically disable your Live Chat widget when your team is unavailable to respond. This way, you can still capture valuable customer information even outside of business hours, without leaving visitors hanging.

1. Go to **Live Chat Settings**.
2. Navigate to the **Onboarding** tab.
3. Select **Live Chat**.
4. Click on **Add Live Chat** (or edit an existing one if you have one).
5. Choose **Advanced Settings**.
6. Select the **Offline** tab.
7. Toggle on **Enable Business Hours**. New options will appear.



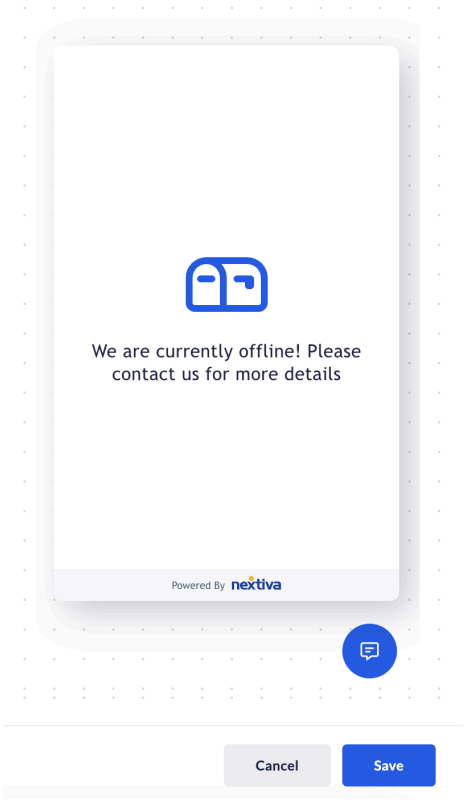
8. Select the dropdown menu under **Business Hours**.

- Choose the business hours schedule you've already created in your settings.
- If you haven't created a schedule yet, select **Manage Business Hours** to be taken to the settings where you can set one up.



9. Enter the message you want to display to visitors when Live Chat is unavailable.
10. Toggle on the option to allow customers to submit a case even when Live Chat is offline. This is a great way to capture leads and follow up with them later.
11. Review how the message will be displayed in the preview on the right side of the screen.

12. Select **Save**.



Questionnaires

Questionnaires are a great way to gather lead information and personalize your customer interactions. When visitors start or finish a chat on your website, they'll be prompted to fill out the questionnaire.

Pre-Chat Questionnaire

Want to collect valuable customer information even before the chat begins? Use the Pre-Chat Questionnaire feature to capture details like names and email addresses, helping you turn website visitors into potential leads.

1. Navigate to the **Onboarding** tab.
2. Select **Live Chat**.
3. Select **Add Live Chat** (or edit an existing one if you have one).
4. Choose **Advanced Settings**.
5. Select the **Pre-Chat Questionnaire** tab.
6. Toggle on **Enable Pre-Chat Questionnaire**.

Pre-chat questionnaire

Enable pre-chat questionnaire
Familiarize yourself with your audience by gathering key details such as their name, email, and other contact information.

☒

7. **Add the Information You Need.** The default questionnaire already captures the visitor's email address.

To add more fields, click **Add Field**.

The screenshot shows a configuration interface for a questionnaire. At the top, there is a section labeled "Display message" with a text input field containing "Introduce yourself". Below this is a section labeled "Questionnaire fields" with a blue "+ Add field" link. Under "Questionnaire fields", there is a table with two columns: "FIELD" and "FIELD VALUE". The table contains two rows: one for "Email" with a value of "Enter email" and a delete icon, and one for "Button" with a value of "Start conversation".

FIELD	FIELD VALUE
Email	Enter email 
Button	Start conversation

8. Once you're happy with your questionnaire, select **Save**.

XBert Tip: Be mindful of the information you request – keep it relevant and concise to avoid overwhelming your visitors.

Post Chat Questionnaire

A Post-Chat Questionnaire is used to gather how the customer felt after interacting with the chat. This is a great tool to measure the customer experience and ensure that the customer's needs are being met.

1. Navigate to the Onboarding Tab.
2. Select **Live Chat**.
3. Select **Add Live Chat**.
4. Select **Advanced Settings**.
5. Select **Post-Chat Questionnaire**.
6. If a survey is currently active, the survey name will display.
7. Select **Add New** or **Update Existing Survey** hyperlink.

Post-chat survey

Selected survey: **survey test**

[Add New Or Update Existing Survey](#) 

8. The survey section will open.

SURVEY Bulk + Create

MANAGE SURVEY

Name	Description	Type	Workspaces	Action
survey test		CSAT	The Roaming Stove	  
Name	Description	Type	Workspaces	Action

First Prev 1 Next Last

9. Select **Create** to create a new survey or edit an existing survey by selecting the pencil icon next to an existing survey.

XBert Tip: To make a survey live, ensure that the Source in the Survey is Live Chat in the correct Workspace. Learn more about [Creating a Survey](#).

10. Select **Next**.

Chatbot Builder

XBert Tip: The Bot Builder widget is exclusively available in our Engage and Power Suite packages. *If you're on the Digital or Core package, this feature is an additional charge if used. If you'd like to upgrade to include chatbot, reach out to Sales or your Project Manager today!*

The Chatbot Builder is your tool for creating interactive chatbots that can engage with your website visitors, answer common questions, and even qualify leads – all without needing a live agent. It's like having a 24/7 virtual assistant on your website!

With the Chatbot Builder, you have the flexibility to craft dynamic chatbot experiences:

- **Add rich content:** Include text, images, videos, and more to make your chatbot interactions engaging and informative.
- **Choose response options:** Control how customers interact with your chatbot by providing multiple-choice buttons, free-text input fields, or even file uploads.
- **Design conversation flows:** Create a series of messages and responses to guide customers through a personalized journey, addressing their needs and providing helpful information.

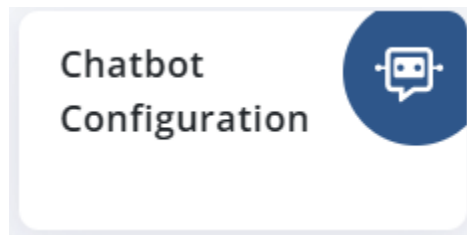
Navigating to the Chatbot Builder

There are two ways to navigate to the chatbot builder. The User can navigate to the builder through settings or through the Onboarding Tab.

Through Settings



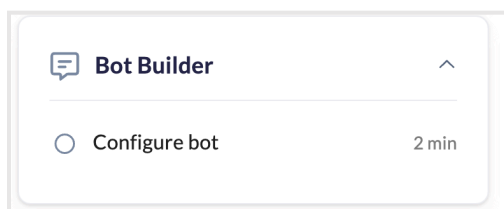
1. Select **Settings** from the left toolbar.
2. Select **Chatbot Configuration**. A page of all created chatbots will appear.



3. Select **New Chatbot** to create a new chatbot.
4. To edit or delete an existing chatbot, select the **three buttons** on the line of the chatbot.
5. Select **Settings**, **Edit** chat flow or **Delete** chatbot.

Through The Home Page

1. Select the **Home** icon from the left toolbar.
2. Select the **Onboarding** tab.
3. Select **Bot Builder**.
4. Select **Configure Bot**.



5. All created chatbots will appear.
6. Select **Create New Chatbot** to create a new chatbot.
7. To edit or delete an existing chatbot, select the **three buttons** on the line of the chatbot.

8. Select **Settings**, **Edit** chat flow or **Delete** chatbot.

Creating a New Chatbot

1. Select Create **New Chatbot**

Create New Chatbot

2. Name your **Chatbot**.

NAME *

3. Select **Live Chat** from Source.

SOURCE *

LiveChat

4. Enter **Session Expiry Time** in 30 minutes intervals.

SESSION EXPIRY TIME (IN MINS) *

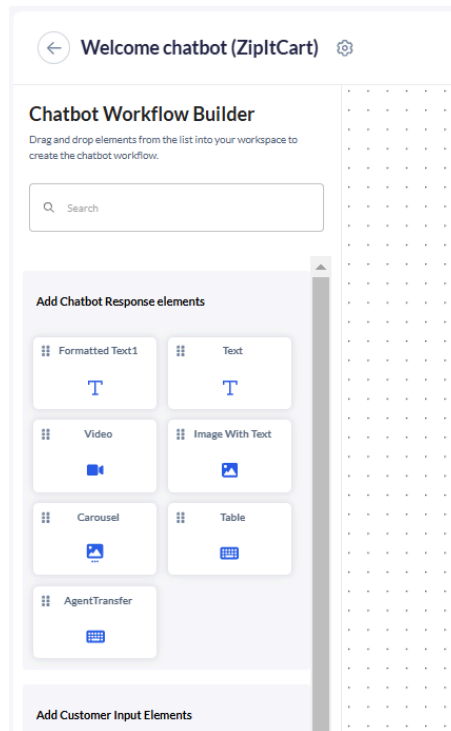
5. Select if you want to **Close Session on Error**.

CLOSE SESSION ON ERROR ☐

6. Select **Next**.

Next

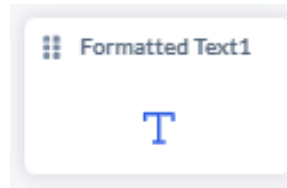
7. Design your chatbot's conversation flow.



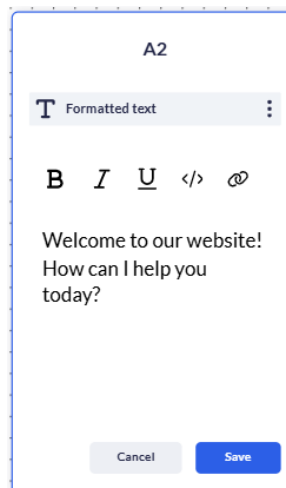
Xbert Tip: You'll be presented with a visual canvas. This is where you'll add and connect cards or nodes.

Adding and Customizing Cards

1. Add a **Formatted** Text Card for the initial greeting.



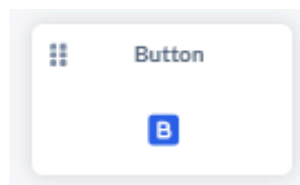
2. **Enter the text** you want to populate when the chatbot pops up on your website. For example: “Welcome to our website! How can I help you today?”



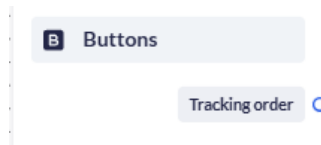
3. Select **Save**.



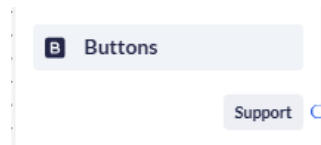
4. Please include a **Button** to provide options. You can accomplish this by selecting the button and integrating it into the formatted text.



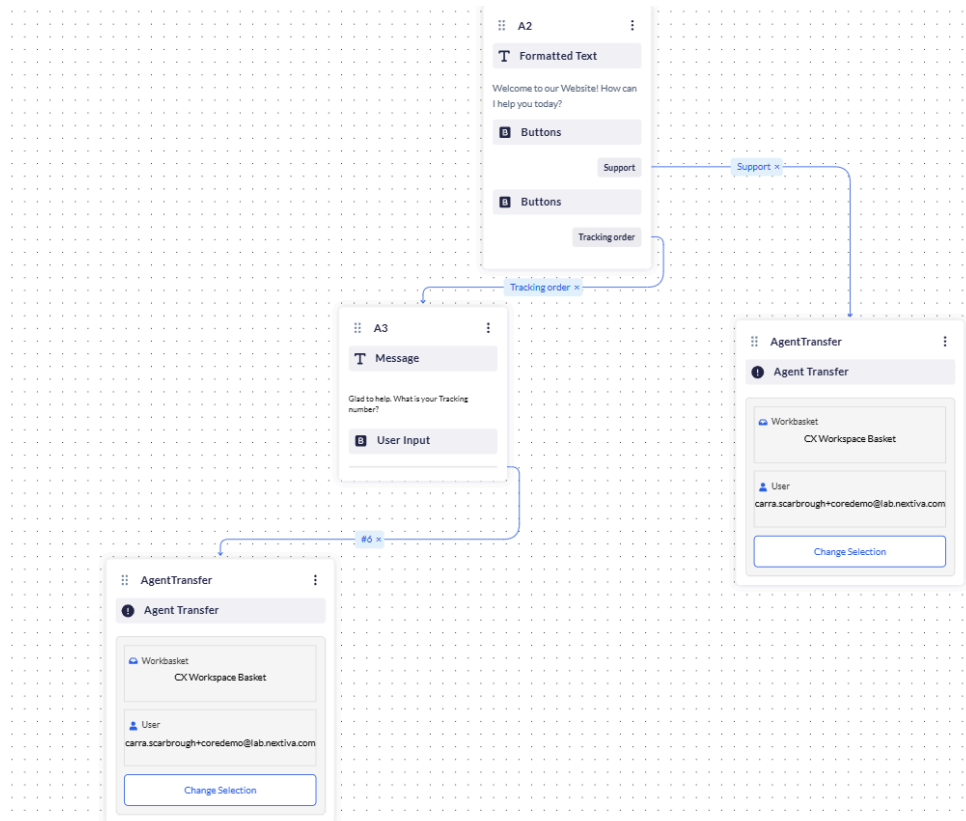
a. **Button 1:** Track Order



b. **Button 2:** Support



5. Create **Separate Cards** for each button's destination.



Xbert Tip: Connect the buttons on the **Button Card** to their corresponding destination cards. This defines the conversation flow.

Previewing and Publishing

1. Use the **Run Preview** or **Test Chatbot** option to **simulate** a conversation and ensure everything works as expected.



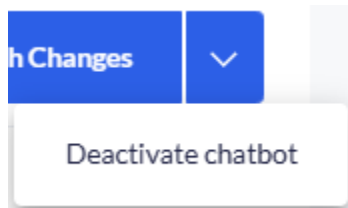
Run Preview

2. Select **Save Changes or Publish**.



Publish Changes

3. Select the Drop down arrow if you wish to deactivate the chatbot.



Integrating with Live Chat

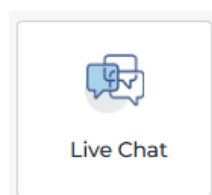
1. Navigate to the settings



2. Select the action pencil of the workspace that you want to set up the chatbot too.

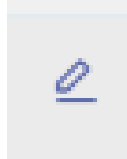
Workspace Name	Last 30 Days Overall Trends	Today	This Week	Today Chat	This Week Chat	Action
ZipitCart Workspace		1	24	0	1	 

3. Navigate to the **Live Chat** settings.



4. Find the **Chatbot Integration** or similar setting.

5. Please select the **Action Pencil** to modify the created chatbot.



6. Fill out the Live Chat Configuration.

Live Chat Configuration

Brand Details

Name ?

Zip It Cart

Brand Name ?

ZipitCart

Brand Description ?

Online Shopping

Brand Logo ?

Cart

Brand Message ?

7. Fill in the Config Details the best you can.

Config Details

Header ?

ZIP IT CART

Header Message ?

Thank you for reaching out to Zipit Cart.

Domain ?

Welcome Message ?

Introduction Message ?

Max Idle Time Out (Sec) ?

600

Bot action on close ?

Close

Delay in Bot Message (Sec) ?

600

Footer Text ?

Footer Icon ?

Start Conversation Message ?

Agent Introduction Message ?

Chat History Introduction Message ?

Session Close Message ?

Show Agents ?

☒

Share Agent Info ?

☐

Holiday Calendar ?

☐

Offline Message ?

Allow Chat to Popup ?

☒

Show Previous Session ?

☒

Show Form ?

☒

Start New Session ?

☒

Display Footer ?

☒

Footer Link ?

☐

9. Fill in the Design Details as needed.

Design Details

Header Size & Colors

Height ?

Font Family ?

Font Size ?

Font Color ?
 

[Cancel](#) [Save](#)

8. Save your Live Chat settings.

[Cancel](#) [Save](#)

Adding the Chatbot to Your Website

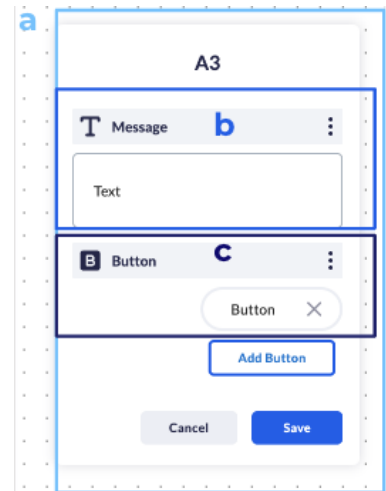
1. Your platform should provide a code snippet (JavaScript or HTML). Copy this code.
2. Paste this code into the HTML of your website, usually just before the closing `</body>` tag.

Testing the Integrated Chatbot

Visit your website and open the live chat. Interact with the chatbot to test all the different paths and options you've configured.

Builder Interface

- a. **Node:** A node refers to a specific step or point in the conversation flow. Each node consists of Chatbot Response Elements and Chatbot Input Elements. A node is represented by an individual block in the builder.
- b. **Chatbot Response Element:** This is where you add the content your chatbot will display to the customer (text, images, videos, etc.).
- c. **Chatbot Input Element:** This defines how the customer can respond to the chatbot's message (buttons, text input, etc.).



A node is represented by a block in the chatbot builder (a) consisting of a Chatbot Response Element (b) and a Chatbot Input Element (c). This makes up what the customer will see from the bot and how the customer will be able to respond to the bot. Each response from the business should have a way for the customer to interact with what was shared.

XBert Tip: Every chatbot response should include a way for the customer to interact and continue the conversation.

Building Your Chatbot's Conversation Flow

Every interaction your chatbot has with a customer is made up of a series of conversation points, each represented by a **node** in the Chatbot Builder. To create a more engaging and helpful chatbot experience, you'll need to connect multiple nodes to build a natural conversation flow.

Accessing the Chatbot Builder

1. Ensure you have an **Engage** or **Power Suite** NextivaCX package.
2. Navigate to the **Onboarding** tab.
3. Locate the **Bot Builder** widget.
4. Select the **Configure Bot** button.

Creating a Chatbot

1. Select the **Create New Chatbot** button.
2. Enter a descriptive name (e.g., "Customer Support Bot," "Sales Inquiry Bot").
3. **Source:** Choose the channel where this chatbot will be active (e.g., Live Chat).
1. **Session Expiry Time (Minutes):** Define the inactivity duration before the chat session ends.
2. **Close session on error:** Enable to automatically close the chat if an error occurs.
3. Select **Save** to confirm these settings.

Creating Nodes

Each node contains a **Chatbot Response Element** (what the chatbot says) and a **Chatbot Input Element** (how the customer responds). This combination creates a dynamic back-and-forth interaction that guides the customer through the conversation.

1. Select and drag the **Chatbot Response Element** onto the blank canvas from the left-side toolbar. This will be the starting point of your conversation flow, or a subsequent step if you're adding to an existing flow.

- a. Enter the response message the customer will see.
Example: "Thank you for reaching out. How can I assist you today?"
- b. Customize the response element.

Formatted Text: Customize text appearance (regular, italic, bold) for emphasis.

Text: Create simple text messages for the customer.

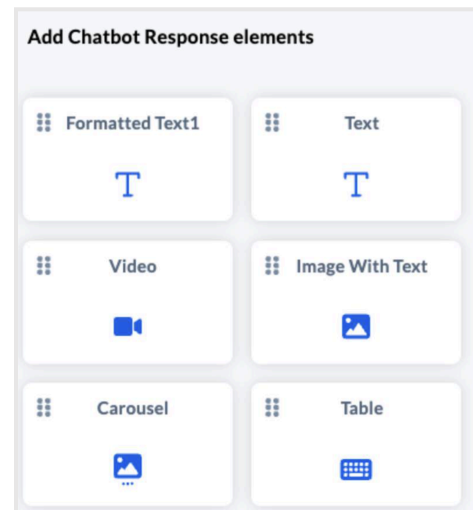
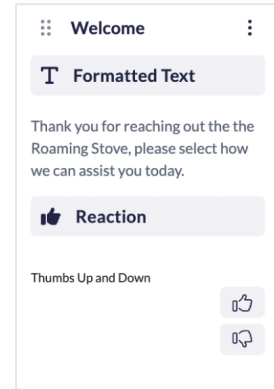
Video: Display a video from a URL or upload.

Image with Text: Show an image with a caption (uploaded or linked).

Carousel: Display multiple images the customer can cycle through.

Table: Present organized information in rows and columns.

- c. **Save** the node.



2. Select and drag a **Customer Input Element** from below the Chatbot Response Elements onto the same node.
 - a. Enter any necessary information for the input element. *How will the customer answer the above question/response element?*
 - b. Customize the input element.

Button: Create clickable buttons with customizable text.

Background Button: Add an image to a button (using a URL).

Thumbs Up and Thumbs Down: Allow quick sentiment feedback.

User Input: Enable customers to type free-form text.

Main Menu: Provide a way to return to an earlier part of the chat.

Calendar: Let customers select specific dates.

Drop Down: Offer a dropdown list of options.

Radio Button: Present single-choice options.

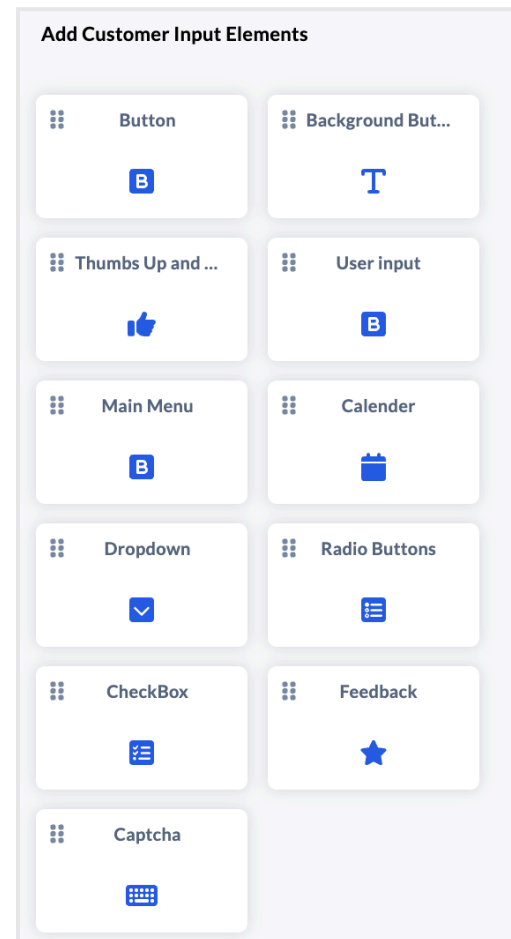
Checkbox: Allow multiple selections.

Feedback: Collect customer ratings on their experience.

Captcha: Verify human interaction using Google reCAPTCHA.

- c. **Save** the node.

XBert Tip: The response should be at the top of the node, and the input at the bottom.

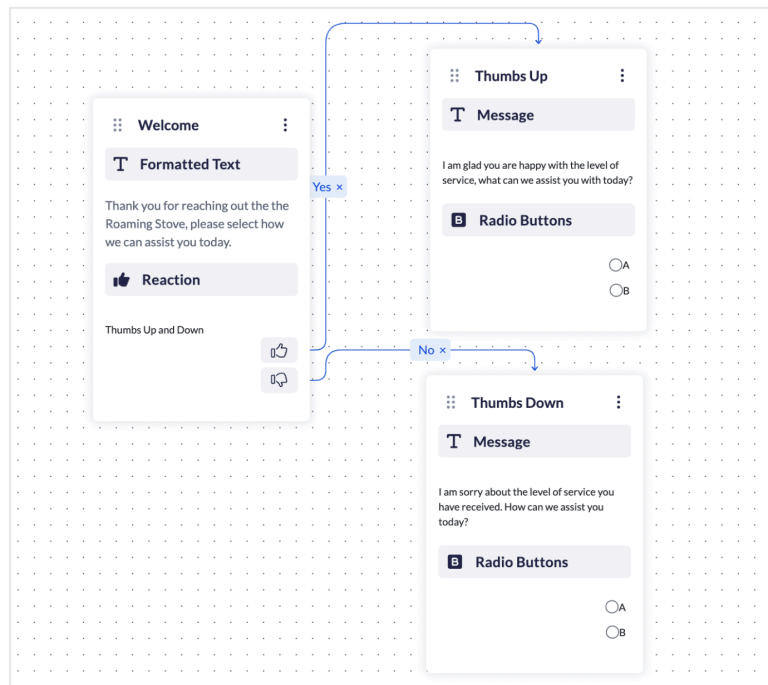


Connecting Nodes

1. Create a new node based on the responses to the previous node. This is done by dragging a new **Chatbot Response Element** onto the canvas.
2. Once there are multiple nodes, the input options can be connected to another node. Connect the node by dragging your mouse from one point in a node to another node.
 - a. A **connector** (a line) will appear, linking the two nodes together.
 - b. The connector will be labeled with the input response's name.
3. Continue creating a chatbot conversation flow until all interactions are complete.

Visualize the Flow

As you connect more and more nodes, you'll see your chatbot's conversation flow take shape. This visual representation helps you understand the different paths a customer might take and ensure you're providing the most relevant and helpful information at each step.



XBert Tips:

- Think of nodes as building blocks. You connect them laterally (side-by-side) to create a branching path for the conversation.
- Remember to **Save** your progress frequently!
- Edit the node's name for easier identification.

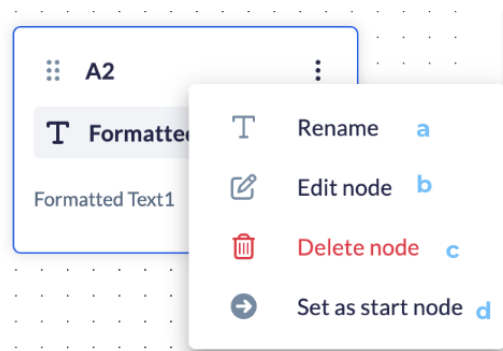
Previewing the Chatbot

Select **Run Preview** in the top right corner to interact with and test your chatbot.

Editing a Node

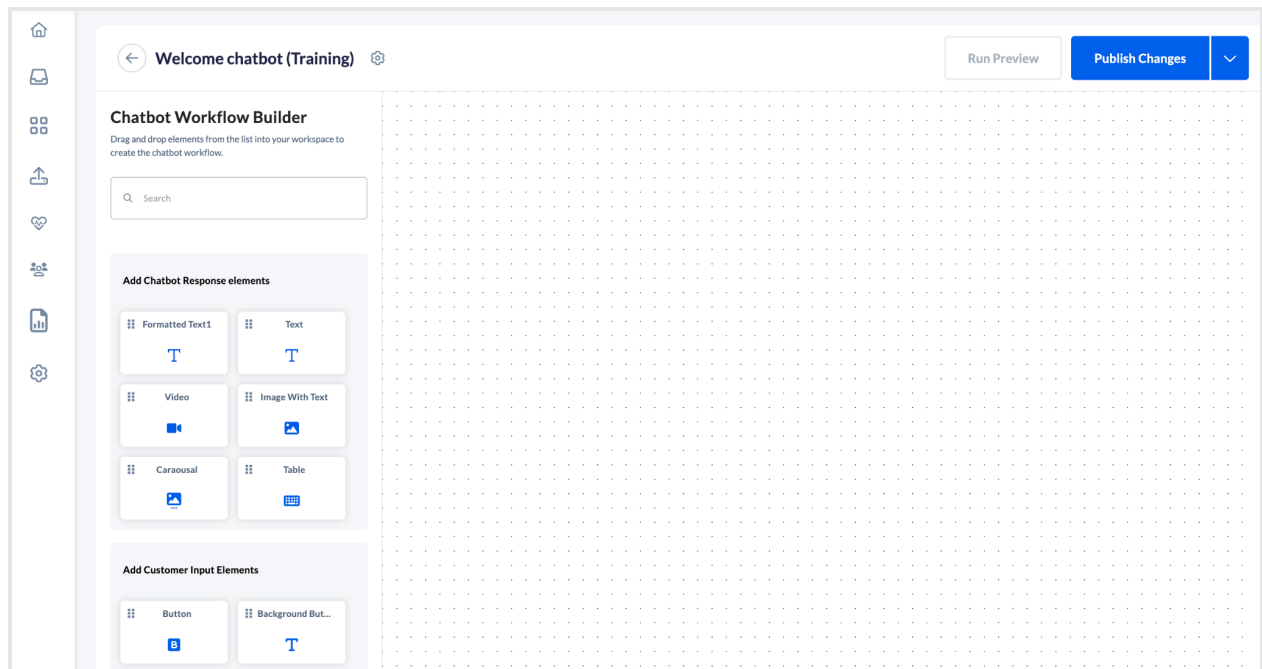
Once the Chatbot Response Element has been added and saved, the node can be edited, renamed, and a chatbot input element can be added.

1. Locate the desired chatbot on the Chatbot home page.
2. Click the three dots under Action.
3. Select **Edit**.
 - a. **Rename:** Rename the Node allows the User to change the default name of the node. In the example below, the default name is A2. Renaming the node helps the User track the chatbot conversation flow.
 - b. **Edit node:** Edit the node unlocks the node so messaging can be added, changed or deleted. This is used if there is a chatbot input element that needs to be changed or the messaging needs to be changed.
 - c. **Delete node:** Delete node is used to delete the entire node that was created.
 - d. **Set as Start node:** Set as start node will bring the node to the front of the conversation flow.



Node Creation Summary

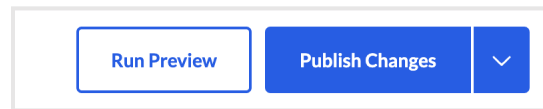
1. Drag and drop a **node** onto the canvas. This will be the starting point of your conversation flow.
2. Within the node, add your **Chatbot Response Element** (e.g., a welcome message or question).
3. Below that, add a **Chatbot Input Element** (e.g., multiple-choice buttons or a text input field) to allow the customer to respond.
4. Add More Nodes by dragging and dropping additional nodes onto the canvas. Each new node represents another step in the conversation.



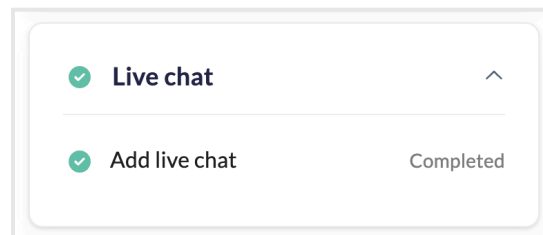
Connecting the Chatbot to Live Chat

Now that you have a completed chatbot conversation flow you will need to connect the chatbot to the live chat. Before publishing the chatbot it is suggested to run a preview by selecting Run preview. Once reviewed follow the steps below to connect the chatbot.

1. To connect the chatbot, select **Publish Changes**.



2. Select **Publish**.
3. Select the **home icon** to go to the onboarding section of the product.
4. Select **Live Chat**.
5. Select **Add Live Chat**.



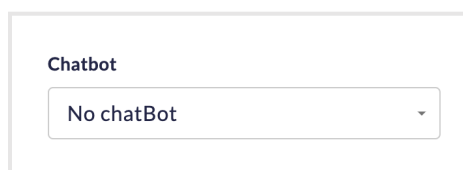
6. Select **Advanced Options**.



7. Select **Chatbot**.



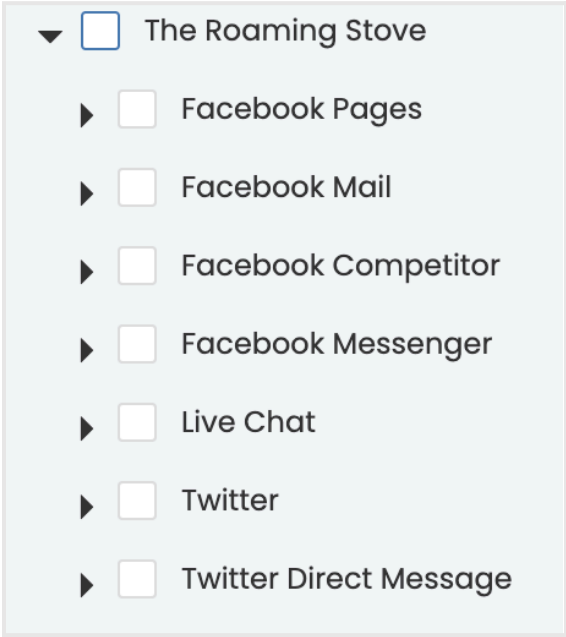
8. Select the dropdown and choose the chatbot you created.



9. Select **Save**.

Filtering to See Chat Messages

1. To only see Chat messages in the Unibox, navigate to the Unibox.
2. Select the **Filter** button.
3. Select the dropdown next to the Workspace that the Live Chat is linked to. Multiple workspaces can be selected at the same time.
4. Select the box next to the live chat source. Multiple boxes can be selected at the same time.
5. Select **filter**.
6. All chat messages will appear.



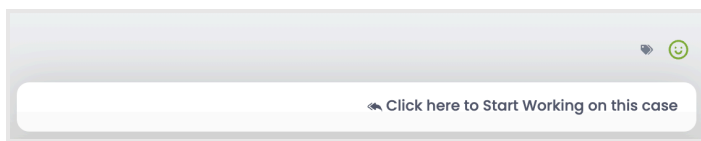
▼ ☐ The Roaming Stove

- ▶ ☐ Facebook Pages
- ▶ ☐ Facebook Mail
- ▶ ☐ Facebook Competitor
- ▶ ☐ Facebook Messenger
- ▶ ☐ Live Chat
- ▶ ☐ Twitter
- ▶ ☐ Twitter Direct Message

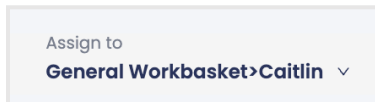
Responding to Chat Messages

All chat messages will be displayed in the Unibox. Users can [filter the Unibox to only see chat messages](#) or enter the Playmode to see incoming chat messages. To reply to the messages, follow the steps below.

1. Select the chat message.
2. All information from the chat message will display. If the customer interacted with a chatbot, the chatbot history will be displayed as well.
3. Select **Click Here** to Start Working on this Case.



4. The case will be assigned to the User that selected that button.



5. A box will appear for the User to respond to the chat.

Chatbot Interactions in Unibox

Every message exchanged between your chatbot and a customer will be neatly documented in the Unibox. This allows you to track the entire conversation history, even if you don't actively participate in every chat.

End of Chatbot Flow

When a customer reaches the end of your chatbot's conversation flow (meaning there are no more nodes to interact with), you have two options:

1. **Continue the Conversation:** If the chatbot was designed to gather information or provide basic assistance, you can simply review the interaction history and decide if further action is needed.
2. **Take Over the Chat:** If the customer requires more personalized assistance or the chatbot couldn't fully resolve their issue, you can seamlessly take over the conversation at any point by replying directly in the Unibox. This overrides the chatbot and allows you to provide a human touch.

Flexibility and Control

NextivaCX gives you the flexibility to decide how and when you engage with customers during chatbot interactions. Whether you want to monitor conversations passively or actively participate, the Unibox provides the tools you need to deliver exceptional customer service.

XBert Tips:

- The Unibox is your central hub for all customer interactions, including those with your chatbot.
- You can review chatbot conversations even if you didn't directly participate.
- You can take over any chatbot conversation at any time by replying in the Unibox.

Messaging Apps

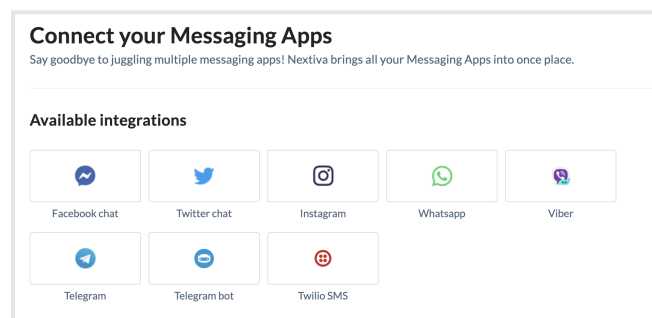
Messaging apps are a popular way for customers to connect with businesses. With NextivaCX, you can streamline your communication by integrating your favorite messaging apps directly into the platform. This means you can manage and respond to messages from multiple apps all in one convenient location - the Unibox.

Supported Messaging Apps

We currently support the following messaging apps. **Remember, you'll need an active business account for each app you want to connect.**

- Facebook Chat
- X Chat (Twitter)
- Instagram
- Whatsapp
- Viber
- Telegram
- Telegram Bot
- Twilio

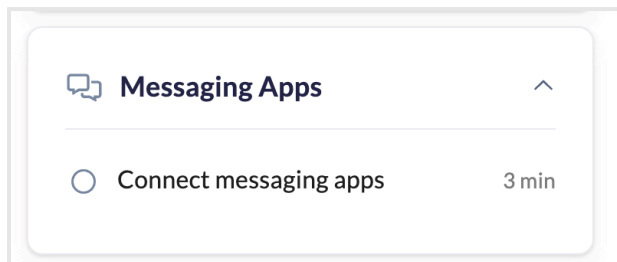
Once connected, all messages will come through the Unibox.



Navigating to Messaging Apps

You can navigate to your Messaging Apps from your Home Page.

1. Navigate to the home page by selecting the **Home** icon.
2. Select the **Onboarding Tab**.
3. Select **Messaging Apps**.
4. Select **Connect Messaging Apps**.



Instagram

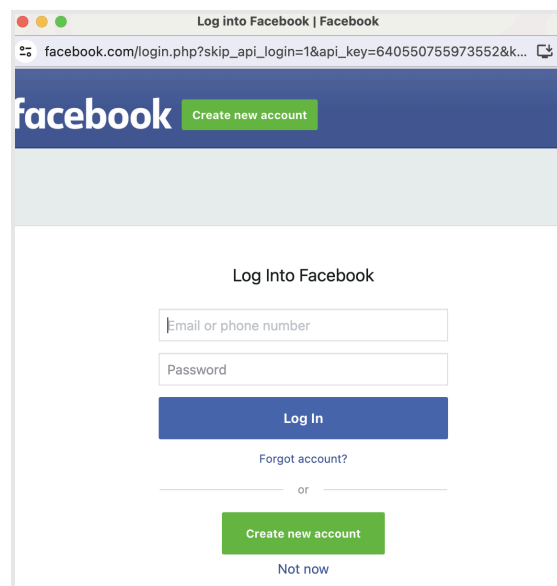


Instagram has direct messaging functionality that can be integrated into NextivaCX. To connect the Instagram messaging feature, you must have a business Instagram account to connect.

1. Navigate to the home page by selecting the Home icon.
2. Select the **Onboarding** Tab.
3. Select **Messaging Apps**.
4. Select **Connect Messaging Apps**.
5. Select **Instagram**.
6. A popup will appear instructing the User to enter the User credentials.

XBert Tip: Since Instagram is owned by the same company as Facebook, the log in information will be the Facebook display.

7. Enter the login information.
8. The Account information will display. Select the **plus button** next to the page you would like to add.
9. A checkmark and Selected will appear. Select **done**.
10. Instagram now displays as connected and is listed under connected accounts.

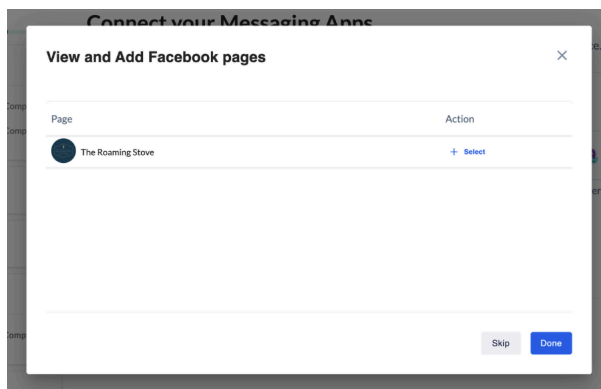


Facebook Chat



Facebook Messenger is a powerful messaging app that you can integrate with NextivaCX to manage customer conversations directly within the platform.

1. From the NextivaCX Home Page, select the **Home** icon.
2. Then, select the **Onboarding** tab.
3. Select **Messaging Apps**.
4. Select **Connect Messaging Apps**.
5. Select **Facebook Chat**.
6. A popup will appear instructing the User to enter their Facebook credentials.
7. Enter the login information.
8. The Account information will display. Select the plus button next to the page you would like to add.



9. A checkmark and Selected will appear. Select **done**.
10. Facebook Chat now displays as connected and is listed under connected accounts.

XBert Tip: To connect to Facebook Messenger, you must have a business Facebook account. If you have a personal account rather than a business account, the following steps will not work.

Link Facebook and Instagram

Since Facebook and Instagram are both owned by Meta, they need to be linked for a successful connection to NextivaCX. Linking from Instagram.

Linking from Instagram

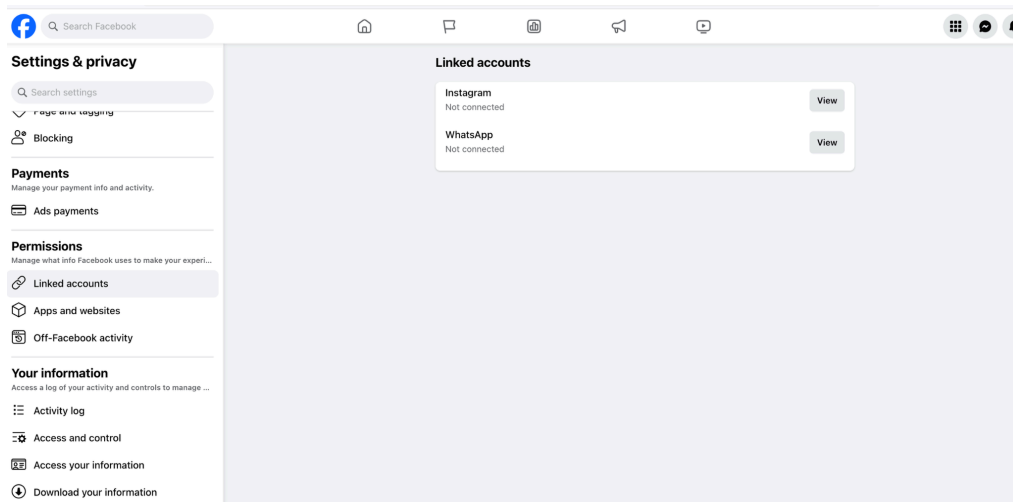
1. Open the Instagram app and go to your profile.
2. Tap on the **three lines** in the top right corner to open the menu.
3. Select **Settings**.
4. Select **Accounts Center**.
5. Choose **Logging in with Accounts**.
6. Tap on **Add accounts** and select **Facebook**.

Linking from Facebook

1. Go to your Facebook business page.

XBert Tip: If it is a personal page rather than a business page, the steps below will not work.

2. On the left-hand menu, select **Manage Page**.
3. Select **Linked Accounts**.
4. Select **Connect Account**. If there is any Instagram page linked, it will show up here.



Verify the Connection in NextivaCX

1. Go back to the **Social Channels** widget in NextivaCX.
2. Try connecting your Instagram page again. If the connection is successful, you should see your Instagram page listed under the **Connected accounts** section.

XBert Tip: If you still can't connect your Instagram page, ensure that you have the necessary permissions on both your Facebook and Instagram accounts to manage the page you're trying to connect.

X (Twitter) Chat



Twitter Chat (also known as X) is the messaging app associated with Twitter (X) that can be connected into NextivaCX. To connect Twitter Chat, you must have a business Twitter (X) account to connect.

1. Navigate to the home page by selecting the Home icon.
2. Select the **Onboarding** Tab.
3. Select **Messaging Apps**.
4. Select **Connect Messaging Apps**.
5. Select **Twitter Chat**.
6. A popup will appear instructing you to enter your Twitter (X) credentials.
7. Enter your login information.
8. The Account information will display. Select the plus button next to the page you would like to add.
9. A checkmark and Selected will appear. Select **done**.
10. Twitter Chat now displays as connected and is listed under connected accounts.

WhatsApp



WhatsApp is a messaging application that allows users to send text messages, voice messages, and other media. Owned by Facebook, WhatsApp is one of the most popular messaging apps globally, known for its end-to-end encryption and user-friendly interface. WhatsApp provides the ability to send out messages via campaign (outbound).

1. Navigate to the home page by selecting the Home icon.
2. Select the **Onboarding** Tab.
3. Select **Messaging Apps**.
4. Select **Connect Messaging Apps**.
5. Select **Whatsapp**.
6. A popup will appear instructing the User to enter the User credentials.

A screenshot of a 'WhatsApp Accounts' popup form. The form has a title bar with 'WhatsApp Accounts' and a close button (X). It contains four input fields: 'Name*' with placeholder 'Enter name', 'Phone*' with placeholder 'Enter phone number', 'Access Token*' with placeholder 'Enter access token', and 'Profile Picture' with an 'UPLOAD' button. At the bottom right are 'Cancel' and 'Save' buttons.

WhatsApp Accounts ×

Name*

Phone*

Access Token*

Profile Picture

7. Select **Save**.

Locating the Access Token

To locate the access token, you will need to have access to your business Whatsapp account. To continue to use Whatsapp through NextivaCX, a permanent access token will need to be generated from Whatsapp. To generate the permanent access token, follow the steps below.

1. Navigate to Business Settings.
2. Select the business account your app is associated with.
3. Below Users, select System Users.
4. Select Add.
5. Name the system user, select Admin as the user role, and select Create System User.
6. Select the whatsapp_business_messaging permission.
7. Select Generate New Token.
8. Copy and save your token. The access Token will be a random string of numbers and letters.



Viber is a messaging and calling app that allows you to send messages, make voice and video calls, and share various media, including photos and videos, similar to Whatsapp.

1. Navigate to the home page by selecting the Home icon.
2. Select the **Onboarding** Tab.
3. Select **Messaging Apps**.
4. Select **Connect Messaging Apps**.
5. Select **Viber**.
6. A popup will appear instructing the User to enter the User credentials.

Viber Accounts



Name*

Uri Name*

Please fill out this field.

App Secret*

Profile Picture

UPLOAD

Add New Account

7. Select **Add New Account**.

Telegram



Telegram is a cloud-based instant messaging app and communication platform that offers the ability to message and video chat. They emphasize security, privacy, and speed.

1. Navigate to the home page by selecting the **Home** icon.
2. Select the **Onboarding Tab**.
3. Select **Messaging Apps**.
4. Select **Connect Messaging Apps**.
5. Select **Telegram**.
6. A popup will appear instructing the User to enter the User credentials.

The image shows a 'Telegram Phone' registration form. It includes fields for 'Display Name*', 'App ID*', 'App #*', and 'Registered Phone Number*'. The phone number field has a dropdown menu with the US flag selected and a 'Trigger OTP' button. There is also an 'OTP*' field. A 'Verify & Save' button is located at the bottom right of the form.

7. Select **Verify and Save**.

XBert Tip: [Creating the Telegram Application](#)

Telegram Bot



The Telegram Bot is a software application or script that runs on the Telegram messaging platform, allowing users to interact with a bot through chat messages.

1. Navigate to the home page by selecting the Home icon.
2. Select the **Onboarding** Tab.
3. Select **Messaging Apps**.
4. Select **Connect Messaging Apps**.
5. Select **Telegram Bot**.
6. A popup will appear instructing the User to enter the User credentials.

A screenshot of a 'Telegram Bot' configuration popup. The title bar at the top says 'Telegram Bot' with a close button (X) on the right. Below the title bar is a horizontal line. Underneath, there is a 'Profile Picture' section with an 'UPLOAD' button. Below that is a 'Token*' section with a text input field. At the bottom right of the form is a blue 'Save' button.

7. Select **Save**.



Twilio is a messaging app that helps your business provide customers with customer support, engage in two-way messages, send appointment reminders, launch marketing campaigns and more.

1. From the onboarding screen select **Messaging Apps**.
2. Select **Connect Messaging Apps**.
3. Twilio will be found as an integration option. Select the **Twilio tile**.
4. A popup will appear asking you to provide information about your Twilio Account. The Twilio information is found on the Twilio home page and through settings.
 - a. **Name**- Enter the name you would like to call the connected Twilio account.
 - b. **Registered Phone Number**- Enter the phone number assigned by the Twilio account. This is found on the Twilio homepage of the develop page.
 - c. **Service SID**- Enter the Service SID. This is used to authenticate the Twilio Service. This is found by selecting the Twilio Message Service ID.*
 - d. **Account SID**- The Account SID is used to authenticate the Twilio Account. Enter the Account SID found on the Twilio homepage of the develop page.
 - e. **Access Token**- The access token is used to allow access to Twilio's services through other platforms. This is found on the homepage of the develop page.
5. Once all information is entered, copy the webhook and enter it into your Twilio account. To do this, follow the steps below.
 - a. Copy this link which is also located at the bottom of the pop up <https://data6.simplify360.com/bmapi/twilio>
 - b. Navigate to Twilio.
 - c. Select Monitor (Left Hand Navigation).
 - d. Select Logs.
 - e. Select Errors.
 - f. Choose Webhook. Paste the link above.

6. Navigate back to NextivaCX.
7. Select **Verify and Save** located at the bottom of the popup.

XBert Tip: For additional information on locating the requested information below, please refer to the [locating Twilio Information](#) page or watch [this video](#)!

Finding the Account SID, Access Token and Phone Number

1. Login to your Twilio account: <https://console.twilio.com>.
2. On the home page in the develop section you can find Account SID, Auth Token (called Access Token in NextivaCX) and Phone Number.

Finding the Service SID

1. In Twilio, select **Messaging** (Left Hand Navigation).
2. Go to **Services**.
3. Select your Service Name.
4. Copy the Message Service ID. This is your Service SID.

Organizer & Workbaskets

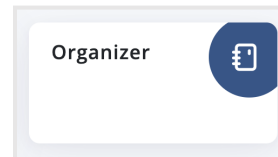
Organizers: Automate Routine Tasks

The Organizer is a powerful tool that lets you automate routine tasks in NextivaCX, such as routing incoming messages, assigning cases to the right team members, and even sending automated replies. It's fully customizable, giving you the flexibility to create rules that match your unique business needs.

The Organizer works on a simple "if this, then that" principle. You define specific triggers (like a chat message containing certain keywords) and then specify the actions you want NextivaCX to take automatically (like assigning the case to a particular team or sending a pre-written response).

Accessing the Organizer

1. Go to **Settings**.
2. Select **Organizer**.



From there, you can start creating your own custom rules to automate your workflow and improve your team's efficiency!

ORGANIZER							+ Create
SETTINGS / ORGANIZER							
Show 10 entries							Search:
Organizer Name	Workspace Name	Updated By	Priority	Created On	Updated On	Actions	
AUTO TICKET	Nextiva CSM Demo	Caitlin Moore	NA	06:56 AM Fri, Feb 2	02:16 PM Wed, May 1	Edit Delete	
ChatLnD	Live Chat_NC	Caitlin Moore	NA	06:42 AM Fri, Dec 22	06:42 AM Fri, Dec 22	Edit Delete	
First Organizer	The Roaming Stove	Matt Spilberg	NA	10:23 AM Mon, Jan 15	08:09 AM Mon, May 6	Edit Delete	
First Organizer	Cousins Maine Lobster	Matt Spilberg	NA	09:54 AM Wed, Apr 17	02:30 PM Thu, May 2	Edit Delete	

When to Use the Organizer

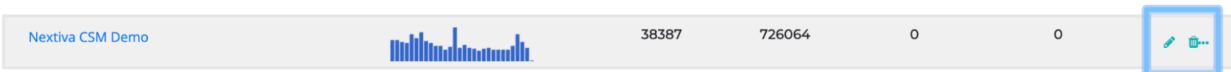
Consider using the Organizer if you want to:

- **Improve efficiency:** Automate repetitive tasks to save time and focus on more complex issues.
- **Ensure consistent responses:** Automatically send standardized replies for common inquiries.
- **Route messages intelligently:** Direct messages to the right teams or agents based on keywords, sentiment, or other factors.
- **Prioritize urgent cases:** Automatically escalate high-priority issues.

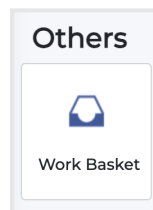
Workbaskets: Teamwork Made Easy

A Workbasket is a group of users within NextivaCX. It's a great way to organize your team and ensure that cases are assigned to the right people. The Organizer can be used to route cases directly to specific Workbaskets, making collaboration a breeze.

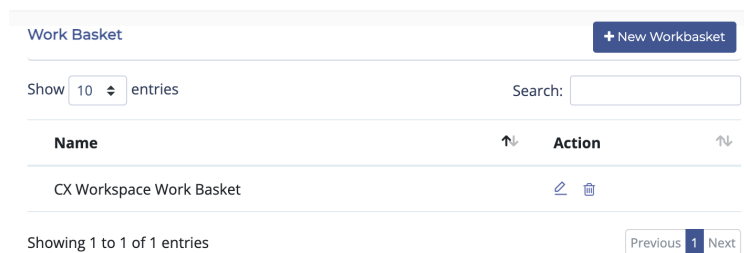
1. Select **Settings**.
2. Select **Workspace Management**.
3. Select the Workspace you would like to add the Workbasket to by selecting the pencil icon next to that Workspace name.



4. Select **Work Basket** in the left box that appears under Others.

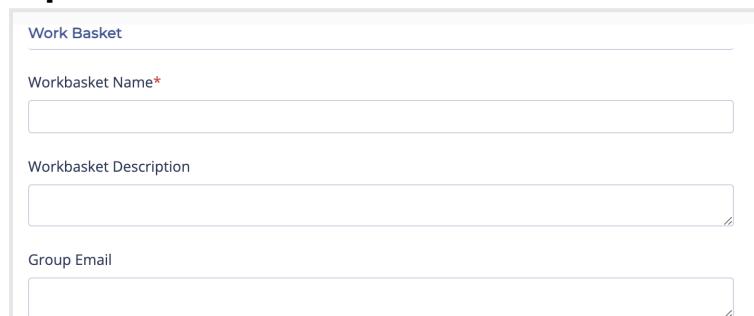


5. All previously created Workbaskets will appear on the right.



6. Select **New Workbasket**.
7. Enter the Workbasket Name to distinguish the new Workbasket from previously created Workbaskets.
8. Enter the **Workbasket Description**.

9. Enter the **Group Email**.



The screenshot shows a form titled "Work Basket". It contains three input fields: "Workbasket Name*" (with a red asterisk indicating it is required), "Workbasket Description", and "Group Email". Each field has a text input area and a small icon on the right side of the input area.

10. Select the Users that should be part of the Workbasket. This is done by selecting the circle under Access next to each Users name.

Select Users

Show 10 entries

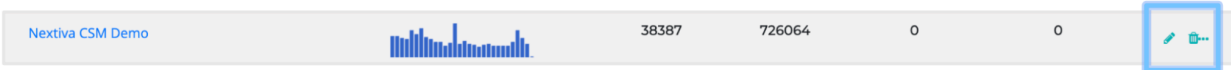
Search:

Share Workspace	↕	User Details	↕	Access	↕
WORKBASKET ADMIN caitlin.moore@nextiva.com		WORKBASKET ADMIN		☒	
adella.lemoine@nextiva.com		WORKBASKET ADMIN		☐	
arian.ghaffari@nextiva.com		WORKBASKET ADMIN		☐	

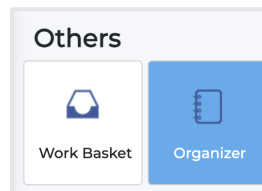
11. When all Users have been added, select **Save**.

Using the Organizer to Assign Cases to a Workbasket

1. Select **Settings**.
2. Select **Workspace Management**.
3. Select the Workspace you would like to add the Workbasket to by selecting the pencil icon next to that Workspace name.



4. Select Organizer in the left box that appears under Others.



5. All previously created Organizers that apply to this Workspace will appear on the right. From this page, you can Create a new Organizer or edit an existing Organizer.

Organizer							+ Create
Show 10 entries		Search:					
Name	↑↓	Details	↑↓	Priority	↑↓	Actions	↑↓
AUTO TICKET		Updated By: Caitlin Moore Created On: 06:56 AM Fri, Feb 2 Updated On: 11:45 AM Wed, May 8		NA		✎ 🗑	
First Organizer		Updated By: Ivan Demyda Created On: 09:55 AM Fri, Feb 9 Updated On: 10:29 AM Tue, May 7		NA		✎ 🗑	
Showing 1 to 2 of 2 entries							Previous 1 Next

6. Assigning a Workbasket takes place in the THEN section of the Organizer. This means, the User needs to decide what actions constitute the Workbasket being assigned (IF) first.

7. Once the IF is assigned, select Assign as the action on the message.

THEN ?

7

8

Action On Message

Assign

Assign to

LEVEL 1

With Priority

Auto Priority

Case Assign Window

Always

Mark as Repeat Customer ? ☐

8. In the Assign To section, select the Workbasket that should be assigned.
9. When complete, select **Save**.

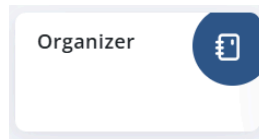
Cancel Save

Creating an Organizer Rule: Step-by-Step

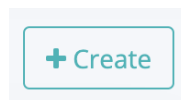
1. Go to **Settings**.



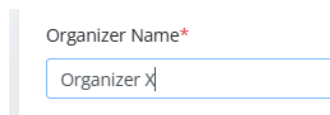
2. Select **Organizer**.



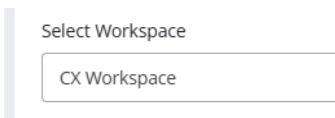
3. Select the **+ Create** button.



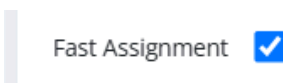
4. Give your rule a clear and descriptive name so you can easily identify it later.



5. Select the Workspace where you want this rule to apply. This ensures that the rule only affects interactions from the channels connected to that specific workspace.



6. Check the box to select optional **Rule Options**:
 - **Fast Assignment:** If enabled, this speeds up case assignment to workbaskets, but accuracy might be slightly reduced if you receive a high volume of messages at once.



- **Add Priority to Rule:** Use this if you have multiple rules that could apply to the same interaction. The rule with higher priority will take precedence.

Add priority to rule ☒ Rule Priority

Prioritize every rule that needs utmost preference while sending auto-responses/assignment when two or more rules matches the same conversation.

If rule priority is not defined, then messages matching with any of the rules can get triggered & if priority is defined, then the rule will get applied based on higher rule priority.

Note: define the rule priority up to 300, the highest number gets a higher priority & you can set a maximum of 300 rules in one priority.

7. Enter the Rule Activity Time. The rule could always be on or could be on for a customized number of hours.

RULE ACTIVITY TIME

This is the time when rules will run based on the schedule designed in your holiday calendar.

Custom

Always

"If This" Logic

The Organizer uses 'If This, Then That' rules to automate actions. Define the 'If This' part (the specific situation or trigger) to begin the rule automation process.

1. Select the source of the interaction from the drop down from **IF** to add a Rule for the source. (For example, chat, Facebook, Twitter, etc.)

RULE CONDITION

Define the condition for which the rules will run for the below sources and select the actions to perform once the messages match the rule criteria.

IF ⓘ

Add a rule for the following source:

Facebook Pages

Add

THEN ⓘ

Add an Action to be applied for above

X

Facebook Pages

Email

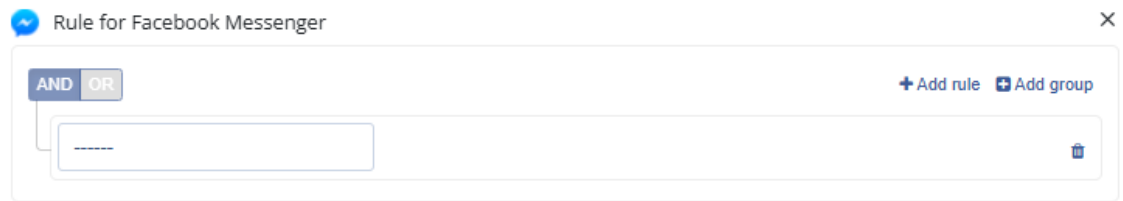
Instagram Business

Instagram Hashtags

Add

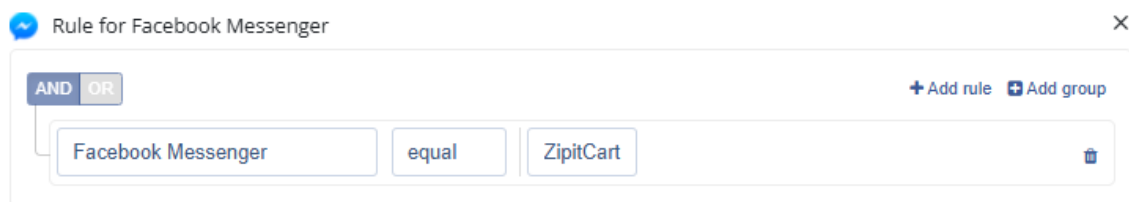
2. Once selected, select **Add**.

IF [?]



3. Once you select add, additional information will appear asking what kind of action from that source should elicit a response.

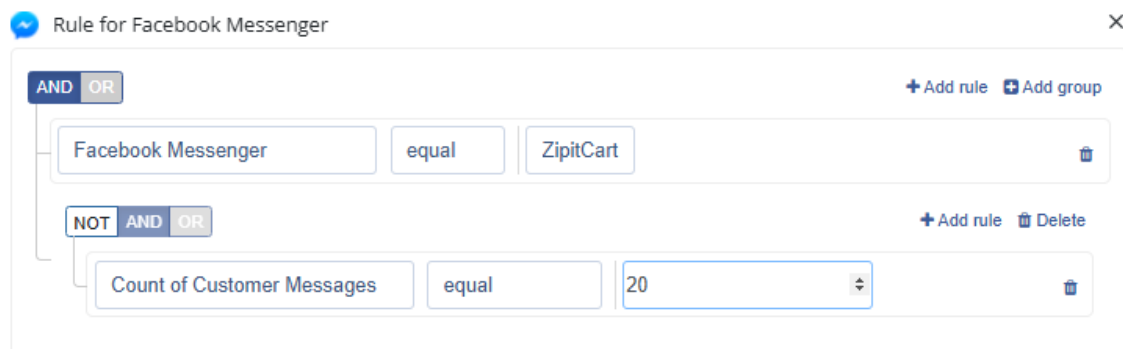
IF [?]



To add additional interactions from the channel, select **Add Rule** and enter more requirements for the rule.

4. Select **Add Group** instead of Add Rule to provide an option to not include a specific interaction. *For example, Message does not contain a specific word.*

IF [?]



Xbert Tip: Continue adding additional sources and the type of interaction until all have been added.

“Then That” Logic

After defining the “If this” logic, you need to define “Then That” logic. The 'Then That' part of the rule is the action you want the system to automatically take when that situation occurs.

1. Add an Action to be applied if the above situation occurs to the **Then** section.

THEN ⓘ

Add an Action to be applied for above rule sets: Workflow Action ▼ Add

- From the drop down, select the desired **action**. There are many different types of actions which can be selected or added here.

Workflow Action ▲

Change Sentiment

Apply Tag

Alert Users

Mark User

Workflow Action ▲ Add

- Select **Add** once the action has been selected. Additional information will appear based on the action type you selected.

For example, if you select Alert Users, a list of the Users you could alert will appear.

THEN ⓘ

🔍 Action On Message ×

Assign ▼

Assign to: Carra ▼ With Priority: Auto Priority ▼ Case Assign Window: Always ▼

Mark as Repeat Customer ⓘ ☐

- Continue adding actions until all actions have been added.

————— **AND** —————

Add an Action to be applied for above rule sets: Workflow Action ▼ Add

- Once complete, select **Save**.

Save Cancel

Calendar

In today's fast-paced digital world, providing readily available customer support is essential for any successful business. Nextiva Chat allows you to connect with your customers in real-time, but it's equally important to manage your availability effectively.

Turn on Business Hours

1. Log in to your Nextiva Dashboard.
2. From the left sidebar, select the Onboarding icon (it looks like a house).
3. Choose **Live Chat** to access your workspace.
4. Select **Advanced Options** below the script.

The screenshot shows the Nextiva Onboarding Dashboard. The left sidebar has a '2' next to the Onboarding icon (house). The main content area is titled 'Add live chat to your website' and includes a progress bar for 'Onboarding progress' at 23%. The 'Live chat' section is highlighted with a '3' and shows 'Add live chat' as 'Completed'. Below this, there are fields for 'Brand Name' (Nextiva), 'Select Logo', 'Select theme' (#005FEC), and 'Select font' (Lato). A 'Publish Live Chat' button is present. At the bottom, there is a code block for the Nextiva Widget script, a 'Copy Code' button, a 'Send To Developer' button, and an 'Advanced Options' button highlighted with a '4'.

nextiva

Onboarding progress 23%

2

Onboarding Dashboard

Kelsi's Workspace

Onboarding progress

23%

Welcome to Nextiva

Social channels

Online Reviews

Messaging Apps

Live chat 3

Add live chat Completed

Bot Builder

Add live chat to your website

Give customers a new way to connect with you.

Brand Name

Select Logo

Select theme

Select font

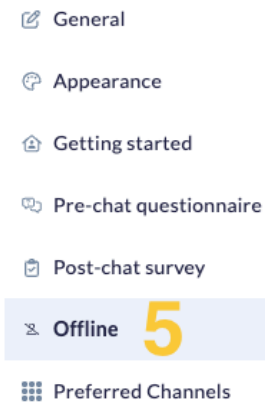
Publish Live Chat

Copy Code Send To Developer Advanced Options 4

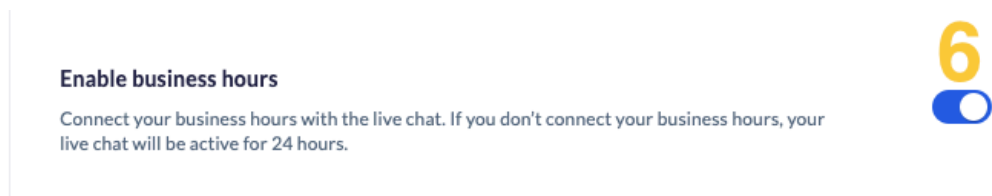
```
<!-- Start of Nextiva Widget script -->
<script src="https://d4cq8fw7kph8i.cloudfront.net/Simplify360Chat.js?
key=UnEvWlQwbVU1cXc9"></script>
<!-- End of Nextiva Widget script -->
```

Copy & paste code before </body> tag on each page where you want the widget to appear.

5. From the left sidebar menu, select **Offline**.



6. Toggle the **Enable Business Hours** option to the ON position.



XBert Tip: Enabling this feature is crucial to link your business hours with your live chat availability. Otherwise, your chat will remain active 24/7.

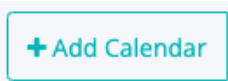
Create a New Calendar

1. After you have turned on business hours, select **Manage Business Hours** option within the Business hours dropdown menu. This will open your holiday calendar.
2. On the Holiday Calendar screen, select **Add Calendar** button.

Business hours

Christmas

Manage business hours [🔗](#)



3. A calendar, working hours and information will display.

HOLIDAY CALENDAR

SETTINGS / HOLIDAY CALENDAR / ADD CALENDAR

Calendar Name

Description

TimeZone

(GMT -8:0) Pacific Daylight Time (US/Pacific)

Select Workspace

Apply Only on Holiday

☐

Working Hours

☐ Sunday

🕒

Start time

→

🕒

End time

☐ Monday

🕒

Start time

→

🕒

End time

☐ Tuesday

🕒

Start time

→

🕒

End time

☐ Wednesday

🕒

Start time

→

🕒

End time

☐ Thursday

🕒

Start time

→

🕒

End time

☐ Friday

🕒

Start time

→

🕒

End time

☐ Saturday

🕒

Start time

→

🕒

End time

Save

Cancel

<

>

May 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

4. Enter the following::
 - a. **Calendar Name and Description:** Choose a clear and descriptive name (e.g., "Regular Business Hours," "Weekday Hours").
 - b. **Time Zone:** Select the correct time zone for your business.
 - c. **Workspace:** If you have multiple workspaces, choose the one these hours should apply to

d. Set **Weekly Hours**:

- i. For each day of the week your business operates, check the corresponding box.
- ii. Input the precise "Start time" and "End time".
- iii. Select the **Save** button to save your newly configured business hours.

XBert Tip: Nextiva is an international company, so you will see "Holiday" in regards to the everyday calendar, as well as a 24-hour clock format. Without a Holiday Calendar, your chat will be on 24-7.

Adding or Editing Holiday Hours

1. Set your business hours calendar above if you haven't yet.
2. Locate the pencil icon next to the calendar you want to edit and click it.
3. Select the "Add Holiday" button in the top right corner.
4. Select the date line to open the calendar.
5. Select the holiday date(s) from the calendar picker.
6. Choose the corresponding operating hours for the selected date(s) from the dropdown menus.

A rectangular button with a teal border and a teal plus icon followed by the text "Add Holiday" in teal.

Why It Matters:

Setting your business hours on Nextiva Chat is crucial for managing customer expectations and providing timely support. You can avoid missed opportunities and potential customer frustration by accurately reflecting your availability.

Xbert Tips:

- **Accuracy is Key:** Use the left and right arrows above the calendar to navigate to the month of your added holiday.
 - To delete or modify the holiday hours, click the pencil icon again and make the necessary changes.
- **Communication:** Display your business hours prominently on your website, social media profiles, email signatures, and any other relevant communication channels.
- **Review:** If closed for the entire day, select "Closed." If operating with reduced hours, specify the adjusted times.
 - Enter a "reason" for the holiday hours (this acts as a label on your calendar).
 - Click "Apply" to save the holiday hours to your calendar.

XBert Tip: Hours are displayed in a 24 hour clock.

Settings

Inviting Users Through Settings

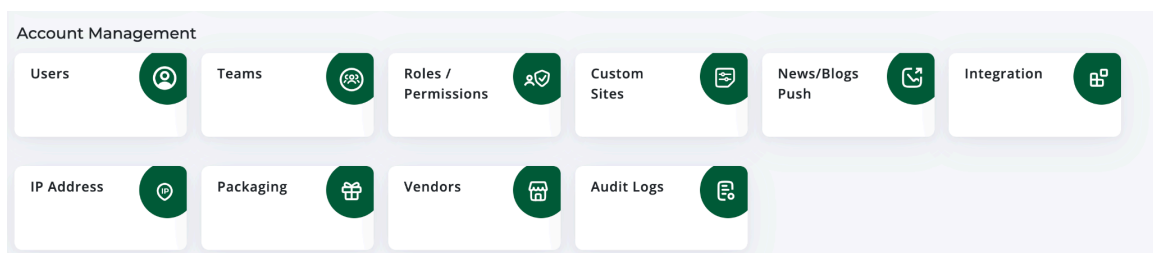
Each person that will be working on an account will need to be added as a user. There are different types of Users on the account.

1. **Account Owner:** This is typically the account owner who creates users, deletes users, changes passwords, etc. The account owner, also known as Super Admin, has access to everything on the account.
2. **Admin account:** This account admin has access to the onboarding tab and User settings along with the ability to respond to interactions.
3. **Members:** Members have access to the Unibox where they can respond to interactions.
4. **Viewers**-Viewers are able to view content, but not respond to messages or change settings.

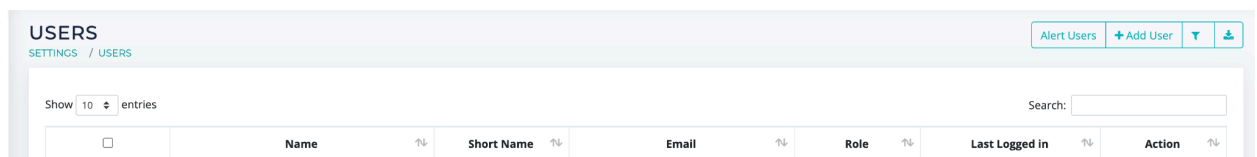
Users can be added through the Onboarding Tab or through the Users section. Only the Account Owner can manipulate User settings.

To add a user from the User section, follow the steps below:

1. Select the **Settings** Icon.
2. Select **Users** under the Account Management section of Settings.



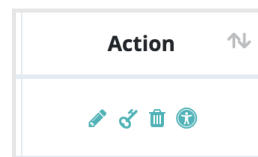
3. Here you will see all active Users. You can add another user by selecting **Add User**.



Changing User Settings

1. Select **Settings**.
2. Select **Users**.
3. Navigate to the line of the User that you would like to change.
4. Select the icon that best applies.

- a. The **edit** icon allows the Account Owner to change the User's role type
- b. The **password** icon allows the Account Owner to reset the User's password
- c. The **trashcan** icon allows the Account Owner to delete the User.
- d. The **User** icon allows the Account Owner to manage the profiles that the User has access to.



EDIT USER ACCESS			
SETTINGS / USERS / EDIT USER ACCESS			
		Q Search Profile/Workbasket	
Access	Name	Role Type	Work Basket Details
☒	The Roaming Stove	PROFILE ADMIN ▾	Add Roles to Workbasket
☒	Detroit Coney Grill	PROFILE ADMIN ▾	No Baskets Present
☒	Cousins Maine Lobster	PROFILE ADMIN ▾	No Baskets Present
			Save Cancel

XBert Tips:

- All profiles the User has access to will be displayed here. The Account Owner can adjust the level of access here. Account Owners will need to assign Users (admins and members) to their specific workspaces.
- Only the Account Owner (Super Admin) is able to change the settings of other Users.

Creating Custom Role and Permissions

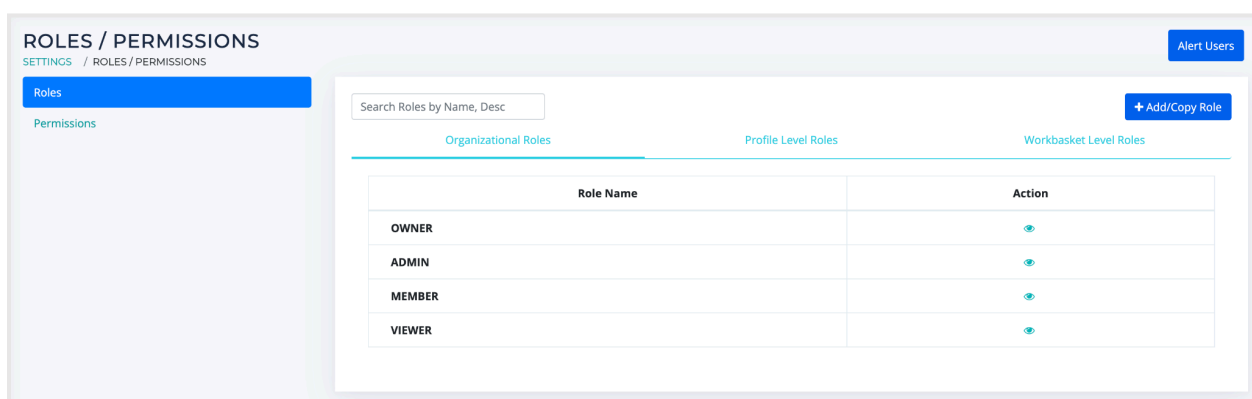
Sometimes you might need more granular control over what your team members can see and do in NextivaCX. That's where Custom Roles & Permissions come in. As the Account Owner, you have the power to create tailored roles that grant specific access levels to individuals or groups of users.

When to Use Custom Roles

- **Restrict access to sensitive data:** Limit which team members can view or modify certain types of information.
- **Tailor permissions to specific tasks:** Give users only the access they need to perform their specific jobs, reducing confusion and potential errors.
- **Streamline workflows:** Ensure that each team member has the right tools and information at their fingertips.

How to Create a Custom Role

1. Select **Settings** from the left-hand toolbar.
2. Choose **Roles and Permissions**. Here, you can view the existing roles and their associated permissions.
3. Select **Add/Copy Role**.



4. **Configure the Role:**

- a. **Role Name:** Enter a clear and descriptive name for the new role.
 - b. **Role Description:** (Optional) Provide a brief explanation of the role's purpose and responsibilities.
 - c. **Role Type:** Choose whether this role is for an **Admin** or a **User**.
 - d. **Copy Existing Role:** (Optional) If you want to base your new role on an existing one, select the role you want to copy.
5. Under the **Permissions** section, you can fine-tune access for various areas of NextivaCX, including:
- a. **Organization**
 - b. **Profile**
 - c. **Workbasket**
 - d. Carefully select the permissions you want to grant for each area.
6. Once you're satisfied with your configuration, select **Save**.

Assigning the Custom Role to a User

1. Navigate to the **Users** section within your NextivaCX settings.
2. Find the user you want to assign the new role to.
3. Select the **edit icon** on their row.
4. In the user's profile, select the **new custom role** you just created from the dropdown menu.
5. Save the changes.

XBert Tips:

- Only the **Account Owner** can create and manage custom roles.
- Use custom roles thoughtfully to enhance security and optimize your team's workflow in NextivaCX.

Manage Channels

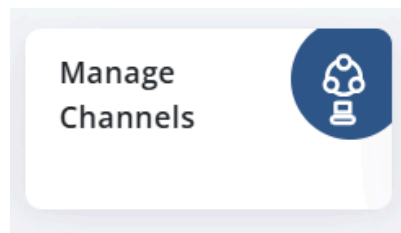
The Manage Channel feature empowers you with unparalleled control over your data sources. This centralized hub provides a comprehensive overview of all connected channels across the platform, allowing you to effortlessly manage, monitor, and optimize your data streams.

Access Channel Management

1. Navigate to **Settings**.

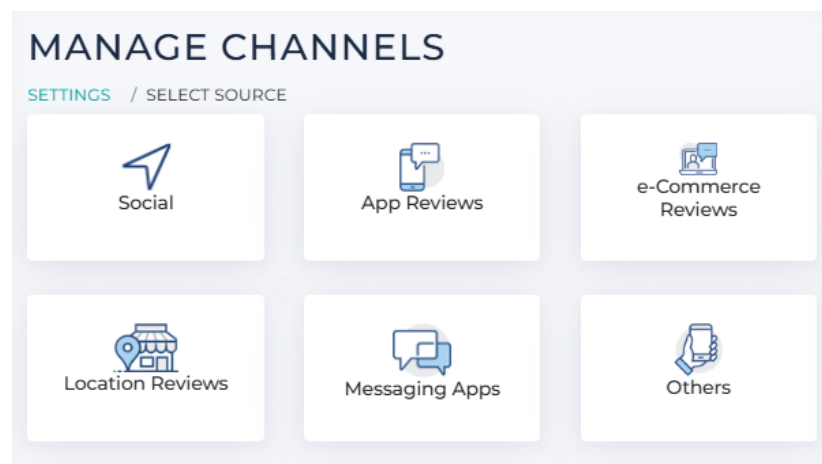


2. Locate and select the **Channel Management** section.



View Connected Channels

1. This section displays all the connected data sources (e.g., Social Media, News, etc.).

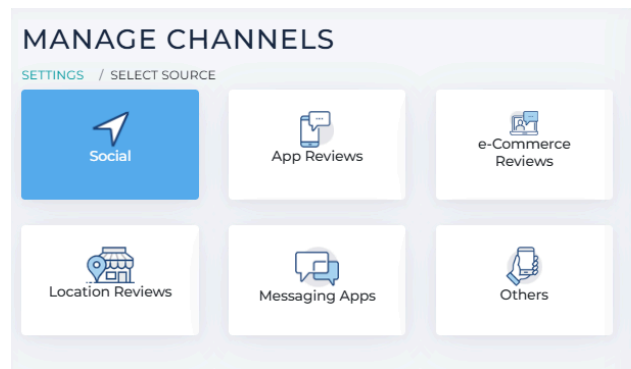


2. Within each source, you'll find a list of the specific channels you're currently tracking (e.g., Facebook Page, Twitter Account).

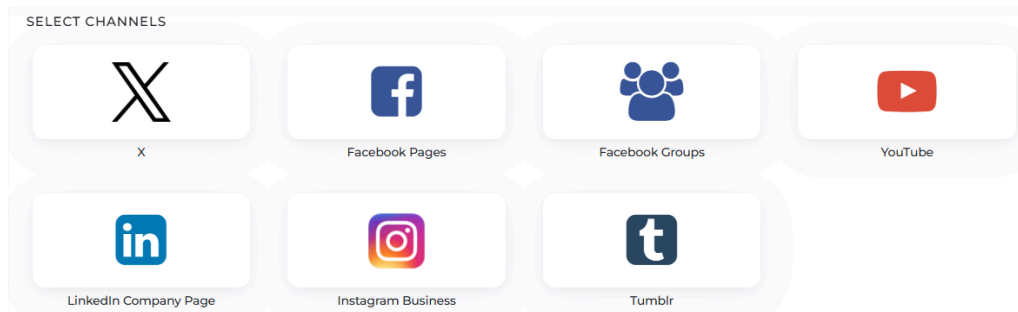
Social Channels

Social Channels is where you will find your connected social channels. Options include X, Facebook Page, Facebook Group, YouTube, LinkedIn Company Page, Instagram Business, Tumblr.

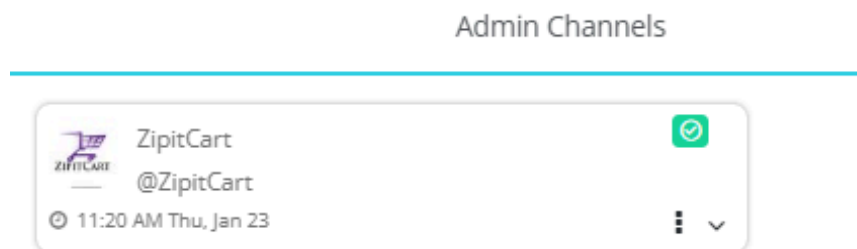
1. Select **Social**.



2. Select the **desired channel** you wish to share.



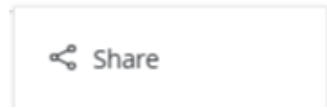
3. Access the channel's admin **box**.



4. Select the **three dots** located in the bottom right corner of the channel.



5. Select **Share**.



- **Check the boxes** of the users with whom you want to share the channel.

Share
☒
☐
☐
☐

- Select **Share**.



Fix Connection Issues

1. Select **Reassociate Channel**.



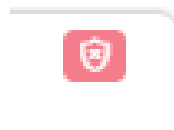
2. Follow the steps to reconnect. You might need to log in again.

Temporarily Stop a Channel

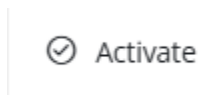
1. Select **Inactivate Channel**.



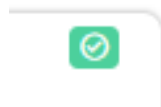
2. When **inactive** you will see a red x on the top right corner.



3. Select **Activate**



4. When activated again, you will see a **green check mark** on the top left corner.



Xbert Tip: IF still red it is INACTIVE.

Delete a Channel

1. Select **Delete Channel** to fully remove a channel.



XBert Tip: There is no way to recover the channel once deleted; be sure you wish to delete the channel before selecting this option.

Add New Channels

1. Select **Add Channel** to connect a new channel.



2. Follow the steps to connect it to the [social channel](#).

Creating and Configuring a Chatbot for Live Chat

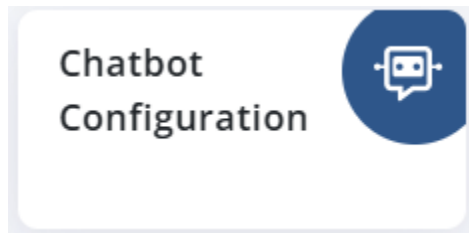
Chatbots improve customer engagement by delivering automated responses and optimizing workflows. The following is a comprehensive guide on the creation, configuration, and integration of a chatbot into live chat systems. This guide will walk you through creating and integrating a chatbot for your website's live chat. We'll use placeholder names and examples, but you can adapt these to your specific needs.

Accessing Chatbot Configuration

1. Navigate to the **Settings**



2. Select **Chatbot Configuration** or a similarly named option.



Creating a New Chatbot

1. Select Create **New Chatbot**

Create New Chatbot

2. Name your **Chatbot**.

NAME *

3. Select **Live Chat** from Source.

SOURCE *

LiveChat

4. Enter **Session Expiry Time** in 30 minutes intervals.

SESSION EXPIRY TIME (IN MINS) *

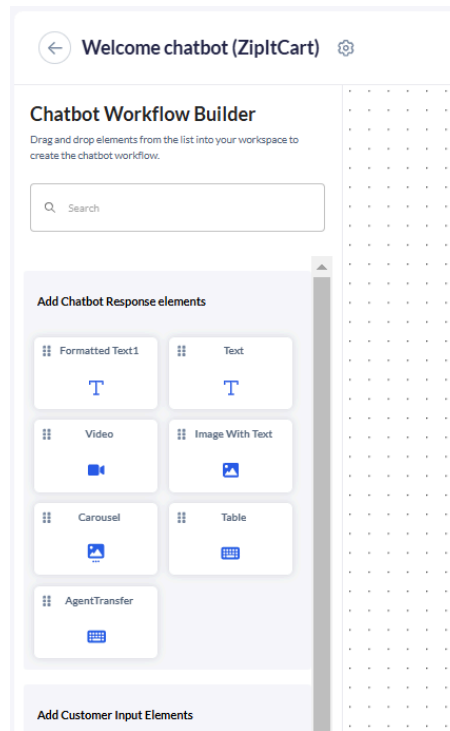
5. Select if you want to **Close Session on Error**.

CLOSE SESSION ON ERROR ☐

6. Select **Next**.

Next

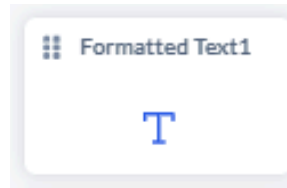
7. Design your chatbot's conversation flow.



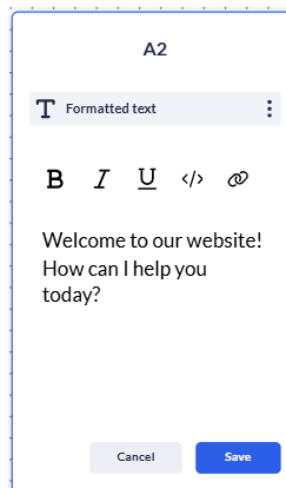
Xbert Tip: You'll be presented with a visual canvas. This is where you'll add and connect cards or nodes.

Adding and Customizing Cards

1. Add a **Formatted** Text Card for the initial greeting.



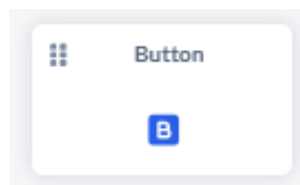
2. **Enter the text** you want to populate when the chatbot pops up on your website. For example: “Welcome to our website! How can I help you today?”



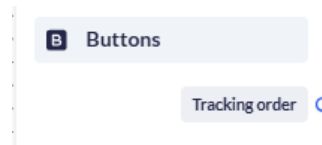
3. Select **Save**.



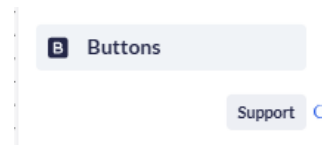
4. Please include a **Button** to provide options. You can accomplish this by selecting the button and integrating it into the formatted text.



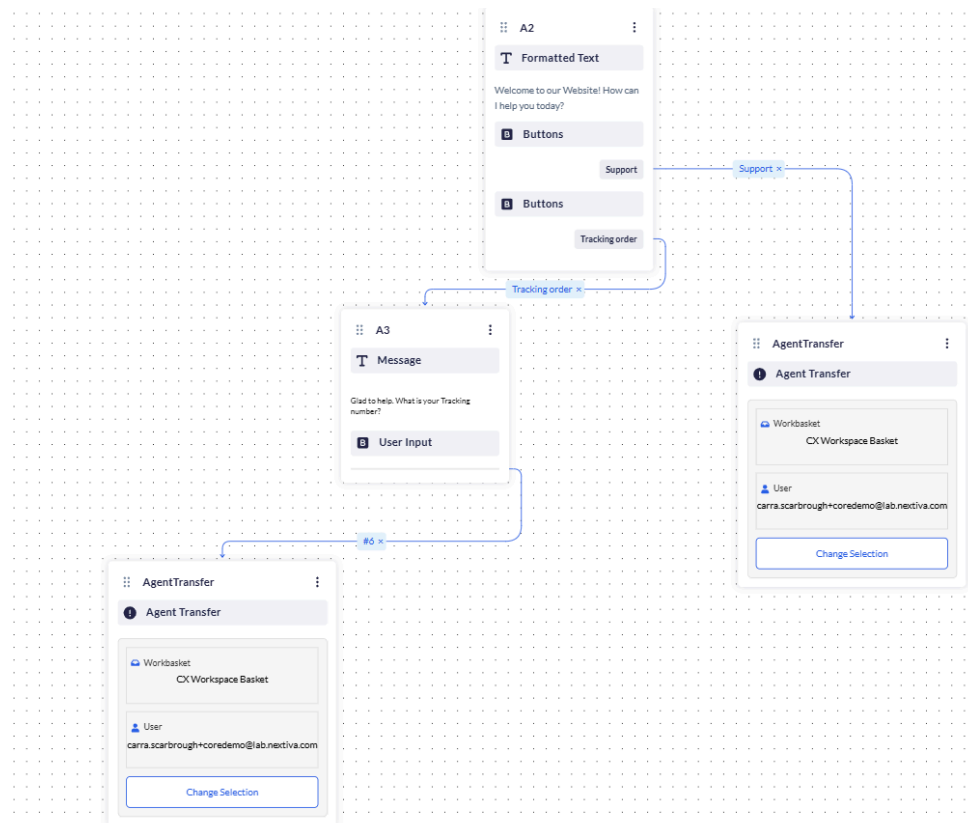
a. **Button 1:** Track Order



b. **Button 2:** Support



5. Create **Separate Cards** for each button's destination.



Xbert Tip: Connect the buttons on the **Button Card** to their corresponding destination cards. This defines the conversation flow.

Previewing and Publishing

1. Use the **Run Preview** or **Test Chatbot** option to **simulate** a conversation and ensure everything works as expected.



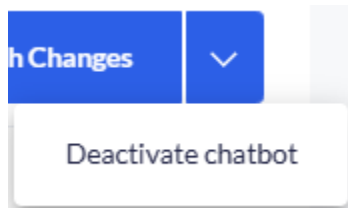
Run Preview

2. Select **Save Changes or Publish**.



Publish Changes

3. Select the Drop down arrow if you wish to deactivate the chatbot.



Integrating with Live Chat

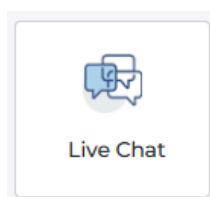
1. Navigate to the settings



2. Select the action pencil of the workspace that you want to set up the chatbot too.

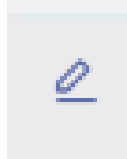
Workspace Name	Last 30 Days Overall Trends	Today	This Week	Today Chat	This Week Chat	Action
ZipitCart Workspace		1	24	0	1	 

3. Navigate to the **Live Chat** settings.



4. Find the **Chatbot Integration** or similar setting.

5. Please select the **Action Pencil** to modify the created chatbot.



6. Fill out the Live Chat Configuration.

Live Chat Configuration

Brand Details

Name ?

Zip It Cart

Brand Name ?

ZipitCart

Brand Description ?

Online Shopping

Brand Logo ?

Cart

Brand Message ?

7. Fill in the Config Details the best you can.

Config Details

Header ?

ZIP IT CART

Header Message ?

Thank you for reaching out to Zipit Cart.

Domain ?

Welcome Message ?

Introduction Message ?

Max Idle Time Out (Sec) ?

600

Bot action on close ?

Close

Delay in Bot Message (Sec) ?

600

Footer Text ?

Footer Icon ?

Start Conversation Message ?

Agent Introduction Message ?

Chat History Introduction Message ?

Session Close Message ?

Show Agents ?

☒

Share Agent Info ?

☐

Holiday Calendar ?

☐

Offline Message ?

Allow Chat to Popup ?

☒

Show Previous Session ?

☒

Show Form ?

☒

Start New Session ?

☒

Display Footer ?

☒

Footer Link ?

☐

9. Fill in the Design Details as needed.

Design Details

Header Size & Colors

Height ?

Font Family ?

Font Size ?

Font Color ?
 

[Cancel](#) [Save](#)

8. Save your Live Chat settings.

[Cancel](#) [Save](#)

Adding the Chatbot to Your Website

1. Your platform should provide a code snippet (JavaScript or HTML). Copy this code.
2. Paste this code into the HTML of your website, usually just before the closing `</body>` tag.

Testing the Integrated Chatbot

Visit your website and open the live chat. Interact with the chatbot to test all the different paths and options you've configured.

Publishing Settings / Manage Categories / X Replies

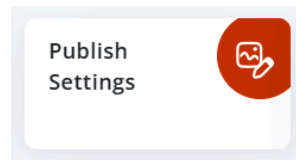
This guide outlines the process of managing and utilizing key features within the Publish Settings to optimize social media engagement. These features include managing categories, saved responses, and Twitter quick replies.

Organizing with Categories

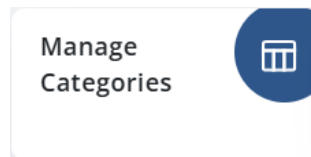
1. Go to **Settings**.



2. Access **Publish Settings**.



3. Navigate to **Manage Categories**



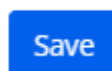
4. Select **+Create Category**



5. Enter Category **Name**

Name*

6. Save **Category**



7. Result

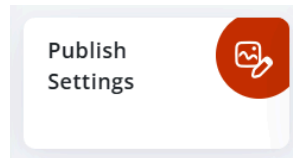
Category Name	Created On	Action
Books	12:52 PM Fri, Jan 31	 
Hoodies	12:52 PM Fri, Jan 31	 
Wine	12:52 PM Fri, Jan 31	 
Category Name	Created On	Action

Crafting Saved Responses

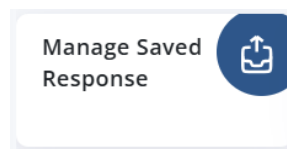
1. Go to **Settings**.



2. Access **Publish Settings**.



3. Navigate to **Saved Responses**.



4. Select **Create Response**.



5. Select **Workspace**.

MANAGE RESPONSE

SETTINGS / PUBLISH SETTINGS / MANAGE RESPONSE / CREATE

Workspace

Please select a workspace ▼

6. Select **Category**.

Category

Please select a category ▼

7. Define **Response Name**.

Response Name*

Please enter the name

8. Choose **Source** (these are the **Categories** created earlier).

Please select a category

Books

Hoodies

Wine

9. Enter **Response Text**.

Private Template ☐ Send DM Link ☐

Response

0

Note: You can use place holders like {screenName}, {fullName} and/or {ticketid} in the reply text.

Send Private Message ☐

10. Add **Tags** (Optional).

▼ TAGS

Search

☐ Hoodies

☐ Returns

☐ Shipping

☐ Watch Bands

☐ Wine

11. Add **Sentiment Filters** (Optional).

Sentiment**

Neutral

Note: ** These fields are only used for giving suggested responses while replying to a message with these tags, sentiment and rating.

12. Save **Response**.

Save

13. When on the Manage Response make sure to Select your Workspace. Otherwise you wont see your newly Created Response.

Generic Response

+ Create Response

Generic Response

ZipitCart Workspace

T1	Created On	Updated On	Action
No Response Created.			
	Created On	Updated On	Action

Previous

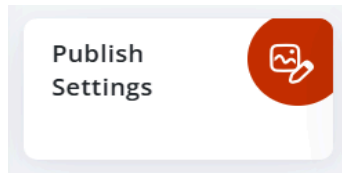
Next

Utilizing Twitter Quick Replies

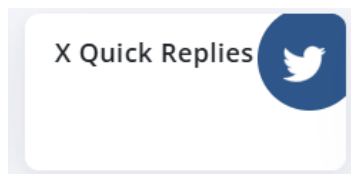
1. Go to **Settings**.



2. Access **Publish Settings**.



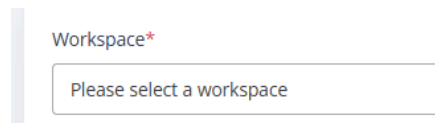
3. Navigate to Twitter Quick Replies



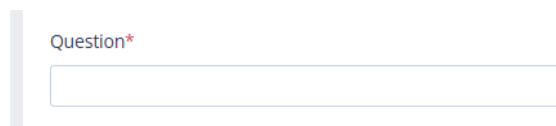
4. Select **Create Response**



5. Select **Workspace**



6. Enter the **Question**



7. Select a **Type**.

Type*

Please select a type

Please select a type
options
location
text

- a. For Options add **Label and Description**.

Type*

options

Label*:

Description*:

- b. For Location you need nothing more.

Type*

location

Xbert Tip: You can add up to 19 extra options equaling 20 total.

- c. For Text add **Label and Keyboard**.

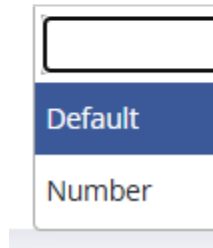
Label*:

Test 3

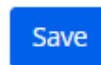
Keyboard:

Default

8. Select if you want the **Default** or **Number Keyboard**.



9. Save **Quick Reply**.



10. View Responses in **Settings** in **X Quick Replies**.

X QUICK REPLIES						+ Create Response
SETTINGS / PUBLISH SETTINGS / X QUICK REPLIES						
Question	Type	Workspace Name	Created By	Created On	Updated On	Action
What is your question?	text	ZipitCart Workspace	Carra Scarbrough	10:22 AM Mon, Feb 3	10:22 AM Mon, Feb 3	Edit Delete
What is your question?	options	ZipitCart Workspace	Carra Scarbrough	10:22 AM Mon, Feb 3	10:22 AM Mon, Feb 3	Edit Delete
What is your question?	text	ZipitCart Workspace	Carra Scarbrough	10:23 AM Mon, Feb 3	10:23 AM Mon, Feb 3	Edit Delete
What is your question?	text	ZipitCart Workspace	Carra Scarbrough	10:23 AM Mon, Feb 3	10:23 AM Mon, Feb 3	Edit Delete
Question	Type	Workspace Name	Created By	Created On	Updated On	Action

Xbert Tips:

1. Private Messages/ADM (Acknowledgment Direct Message), which can auto-fetch data like ticket ID and user name.
2. Responses are tied to specific workspaces.
3. Responses without a workspace selection apply to all workspaces.

Schedule Download

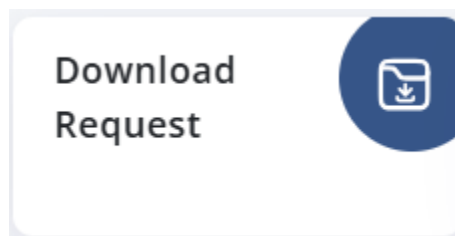
The Schedule Download feature enables users to generate and download reports based on specific criteria and frequencies. Presented below is a comprehensive explanation of how to schedule downloads and manage report generation.

Setting up Download Request

1. Go to **Settings**.



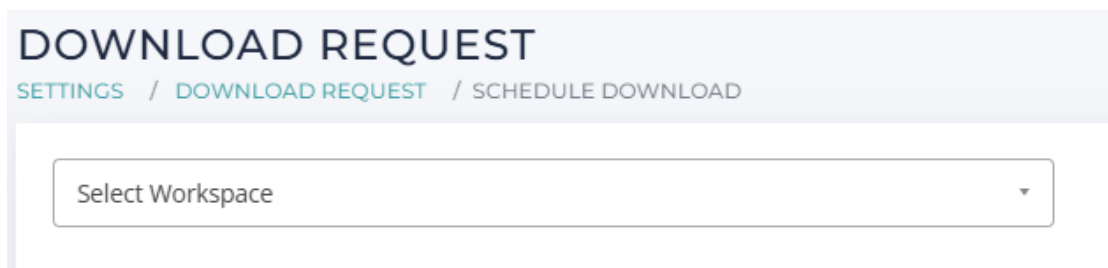
2. Go to the **Download Request** option.



3. Select **Schedule Download**.



4. Select the **Workspace** for the Report.



Provide Report Details

1. Give the report a descriptive name (e.g., "Daily Ticket Report").

Report Name

2. Select the report type from the Report Type dropdown (e.g., Open and Workflow).

Select Report Type

Define Filters and Options:

1. Type the **Complete Queries**.

Filter Options

Complete Query

2. Choose the desired **Sources from the All Sources dropdown menu**.

All sources

3. Select relevant **message properties**.

Message Property

Open

Highlighted

Read

Unread

Deleted

4. Select the fields to include in the report.

☒ Select fields to download

Select fields to download

- | | | | | | |
|---|--|--|---|--|---|
| ☐ MessageID | ☐ Message Source | ☐ Profile Pic | ☐ Profile Link | ☐ From | ☐ Bio |
| ☐ Title | ☐ Message | ☐ Post Image | ☐ Post Name | ☐ Average Rating | ☐ No. Of Raters |
| ☐ Total Views | ☐ Post Caption | ☐ Post Description | ☐ Country | ☐ State | ☐ City |
| ☐ Sentiment | ☐ Gender | ☐ Following | ☐ Followers | ☐ Favourites | ☐ Listed |
| ☐ Status Count | ☐ Comment Count | ☐ Tags | ☐ Link | ☐ Source | ☐ Created On (Posted On) |
| ☐ Collected On | ☐ Timestamp | ☐ Topics | ☐ From Name | ☐ From Email | ☐ From Team |
| ☐ To Name | ☐ To Email | ☐ To Team | ☐ From Basket | ☐ To Basket | ☐ Rule Name |
| ☐ Priority | ☐ Action | ☐ Work Message | ☐ Response Message | ☐ Assigned To Agent | ☐ Assigned To Workbasket |
| ☐ Action Start Date | ☐ Action Date | ☐ Ticket ID | ☐ Notes | ☐ Served On | ☐ Date |
| ☐ Time | ☐ Review | ☐ Sub Query | ☐ Feedback Form | ☐ Message Ageing | ☐ Case Ageing |
| ☐ Action Start Iteration | ☐ Action Start Total | ☐ Action Start WH Iteration | ☐ Action Start WH Total | ☐ First Message Iteration | ☐ First Message Total |
| ☐ First Message WH Iteration | ☐ First Message WH Total | ☐ Case Frt | ☐ Case WH Frt | ☐ Conversation Frt | ☐ Conversation WH Frt |
| ☐ First Conversation Frt | ☐ First Conversation WH Frt | ☐ Holding Time | ☐ Holding Time WH | ☐ Currently Active | ☐ Updated On |
| ☐ First Message CreatedOn | ☐ User Action | ☐ Follow Up By | ☐ Follow Up Date | ☐ Escalations | ☐ Recommendation |
| ☐ Likes | ☐ DisLikes | ☐ Reviewer Type | ☐ Channel Name | ☐ Region Code | ☐ Postal Code |
| ☐ Administrative Area | ☐ Locality | ☐ Address Lines | ☐ Customer Message Count | ☐ Agent Message Count | ☐ Chat FRT Time |
| ☐ New TicketID | ☐ App Version | ☐ Post Updated On | ☐ Engagement Type | ☐ Survey Status | ☐ Reopened |

5. Choose the date type and specify the range.

Today

Yesterday

Last 7 Days

Last 30 Days

This Month

Last Month

Custom Range

Download Options

1. Generate the report immediately.

One time Download ▼

Date Range

2025-01-22 00:00 TO 2025-01-28 12:48

2. Set the frequency (hourly, daily, weekly, etc.).
 - a. Select Repetition interval to define how frequently the download should occur.
 - b. If **Repeat Daily** is selected, define the time it should occur.
 - c. If **Repeat Weekly** is selected, define the Start and End Day.
 - d. The start and end dates (if applicable).
 - e. If Month to Date is selected, select the Hour of Day when the download should occur.

Repeat Download

Scheduled Download - Daily Downloads^(*Scheduling starts from the next day)

☐ Repeat every 1 hour

☐ Repeat every 2 hours

☐ Repeat every 3 hours

☐ Repeat every 6 hours

☐ Repeat every 12 hours

☐ Repeat daily

Start Hour of the day

End Hour of the day

00 Hr

00 Hr

00 Min

00 Min

If the end hour is less than or same as the start hour, then the data will be downloaded from start hour to next day end hour.

Eg-1: If the Start hour is 7PM and End hour is 7AM, then the data will be generated from current day 7PM to next day 7AM.

Eg-2: If the Start hour is 7PM and End hour is 7PM, then the data will be generated from current day 7PM to next day 7PM.

☐ Repeat Weekly

Start day

End Day

Monday

Sunday

☐ Repeat Monthly

☐ Month To Date. Select Hour of day when download should happen

01 Hr

View and Manage Scheduled Downloads

View report name, workspace, start/end dates, request details, and repeat settings.

Completion and Access

1. **Status:** Monitor the status (Scheduled, Completed).
2. **Timeframe:** Note the typical processing time (usually around 10 minutes).
3. **View Report:** Download the completed report in Excel format.

Key Benefits

1. **Customization:** Create reports tailored to specific needs.
2. **Automation:** Schedule recurring reports for consistent updates.
3. **Efficiency:** Streamline reporting and access insights quickly.

Report Generated

DOWNLOAD REQUEST								Schedule Download
SETTINGS / DOWNLOAD REQUEST								
Show 10 entries								Search:
Report Name	Workspace Name	Start Date	End Date	Request Details	Repeat Setting	Status	Completed Date	Actions
SD Last Contact	CX Workspace	12:00 AM Thu, Feb 13	01:52 PM Wed, Feb 19	Email: carra.scarbrough+coredemo@lab.nextiva.com Name: Carra Scarbrough Requested On: 01:52 PM Wed, Feb 19 TimeZone: America/Phoenix	NA	SCHEDULED	--	
Showing 1 to 1 of 1 entries								Previous 1 Next
Note: A maximum of 100 scheduled/completed request would be available at any time. The remaining files would be deleted from our servers.								

Table of Contents

Frequently Asked Questions (FAQs)	2
Accessing the FAQs	2
Creating a New FAQ	2
Media Library	4
Accessing the Media Library Section	4
Adding New Media	4
Features in the Media Library	5
Using the Media Library in Unibox	6

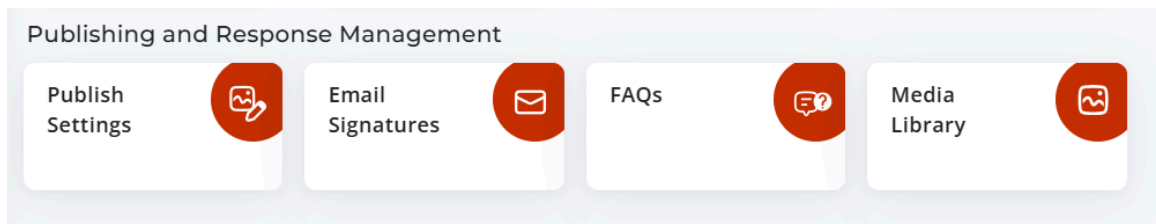
Frequently Asked Questions (FAQs)

Accessing the FAQs

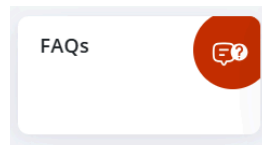
1. Navigate to Settings.



2. Navigate to the **Publishing and Response Management** section.



3. Select **FAQs**.



Creating a New FAQ

1. Select **+Add FAQ**



2. Enter the **Question**.

Question*

3. Write the **Answer**.

Answer*

B **U** **S**  Calibri ▾ 14px ▾  ▾  ▾  ▾     ▾ 

Nope, we don't have any issues with shipping to NY we are only working on expanding to Europe in the future.

4. Assign a **Workspace**.

Assign to workspace

ZipitCart Workspace x

5. Add relevant **Tags**: Return, Refund, Shipping.

Tags* ⓘ

shipping x Enter Tags

6. Select **Create**.

+ Create Cancel

7. What you see once saved.

FAQS

SETTINGS / FAQ

+ Have you every had any issues with shipping to NY?



Xbert Tip: FAQs can be accessed directly from Unibox while replying to a ticket. Agents can search by tags or keywords and insert the pre-configured response into the ticket reply.

Publish Settings

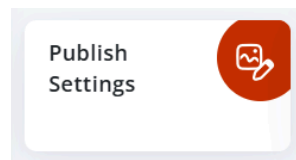
This guide outlines the process of managing and utilizing key features within the Publish Settings to optimize social media engagement. These features include managing categories, saved responses, and Twitter quick replies.

Organizing with Categories

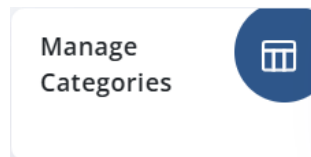
1. Go to **Settings**.



2. Access **Publish Settings**.



3. Navigate to **Manage Categories**



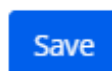
4. Select **+Create Category**



5. Enter Category **Name**

Name*

6. Save **Category**



7. Result

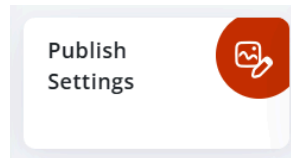
Category Name	Created On	Action
Books	12:52 PM Fri, Jan 31	 
Hoodies	12:52 PM Fri, Jan 31	 
Wine	12:52 PM Fri, Jan 31	 
Category Name	Created On	Action

Crafting Saved Responses

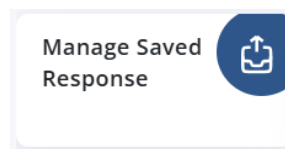
1. Go to **Settings**.



2. Access **Publish Settings**.



3. Navigate to **Saved Responses**.



4. Select **Create Response**.



5. Select **Workspace**.



6. Select **Category**.



7. Define **Response Name**.



8. Choose **Source** (these are the **Categories** created earlier).

Please select a category

Books

Hoodies

Wine

9. Enter **Response Text**.

Private Template ☐ Send DM Link ☐

Response

0

Note: You can use place holders like {screenName}, {fullName} and/or {ticketid} in the reply text.

Send Private Message ☐

10. Add **Tags** (Optional).

▼ TAGS

Search

☐ Hoodies

☐ Returns

☐ Shipping

☐ Watch Bands

☐ Wine

11. Add **Sentiment Filters** (Optional).

Sentiment** **

Neutral x

Note: ** These fields are only used for giving suggested responses while replying to a message with these tags, sentiment and rating.

12. Save **Response**.

Save

13. When on the Manage Response make sure to Select your Workspace. Otherwise you wont see your newly Created Response.

Generic Response

+ Create Response

Generic Response

ZipitCart Workspace

T1	Created On	Updated On	Action
No Response Created.			
	Created On	Updated On	Action

Previous

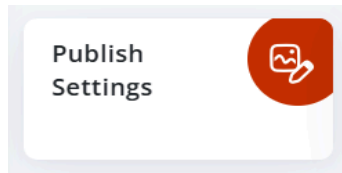
Next

Utilizing Twitter Quick Replies

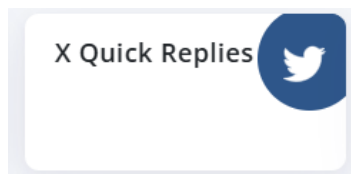
1. Go to **Settings**.



2. Access **Publish Settings**.



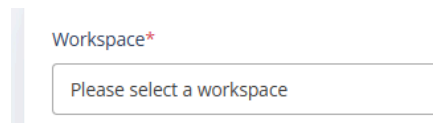
3. Navigate to Twitter Quick Replies



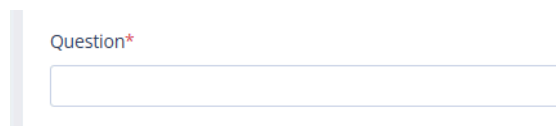
4. Select **Create Response**



5. Select **Workspace**



6. Enter the **Question**



7. Select a **Type**.

Type*

Please select a type

Please select a type
options
location
text

- a. For Options add **Label and Description.**

Type*

options

Label*:

Description*:

- b. For Location you need nothing more.

Type*

location

Xbert Tip: You can add up to 19 extra options equaling 20 total.

- c. For Text add **Label and Keyboard.**

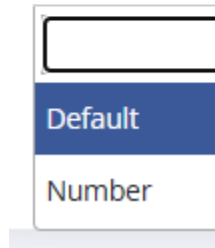
Label*:

Test 3

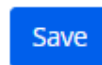
Keyboard:

Default

8. Select if you want the **Default** or **Number Keyboard**.



9. Save **Quick Reply**.



10. View Responses in **Settings** in **X Quick Replies**.

X QUICK REPLIES						+ Create Response
SETTINGS / PUBLISH SETTINGS / X QUICK REPLIES						
Question	Type	Workspace Name	Created By	Created On	Updated On	Action
What is your question?	text	ZipitCart Workspace	Carra Scarbrough	10:22 AM Mon, Feb 3	10:22 AM Mon, Feb 3	Edit Delete
What is your question?	options	ZipitCart Workspace	Carra Scarbrough	10:22 AM Mon, Feb 3	10:22 AM Mon, Feb 3	Edit Delete
What is your question?	text	ZipitCart Workspace	Carra Scarbrough	10:23 AM Mon, Feb 3	10:23 AM Mon, Feb 3	Edit Delete
What is your question?	text	ZipitCart Workspace	Carra Scarbrough	10:23 AM Mon, Feb 3	10:23 AM Mon, Feb 3	Edit Delete
Question	Type	Workspace Name	Created By	Created On	Updated On	Action

Xbert Tips:

1. Private Messages/ADM (Acknowledgment Direct Message), which can auto-fetch data like ticket ID and user name.
2. Responses are tied to specific workspaces.
3. Responses without a workspace selection apply to all workspaces.

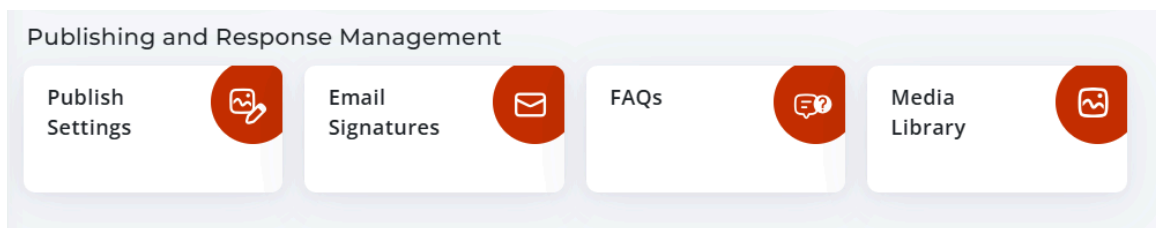
Media Library

Accessing the Media Library Section

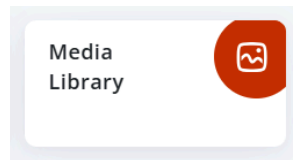
1. Navigate to Settings.



2. Navigate to the **Publishing and Response Management** section.



3. Select **Media Library**.



Adding New Media

1. Select Add New Media.



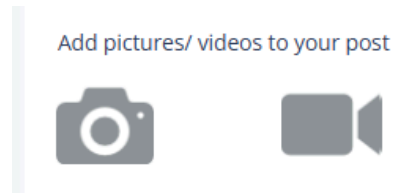
2. Provide a Title:

Title*

3. Add a description (optional).

Description *

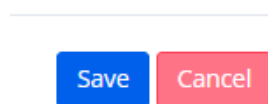
4. Add **Pictures / Videos** to your post.



5. Add tags for better organization (e.g., Product, Image, Summer Collection).



6. Save the **Media** file.



Features in the Media Library

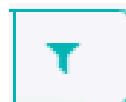
1. Use the Bulk Delete option to remove multiple files.



2. Switch between Grid View and List View for different display options.



3. Select Filter



4. Filter files by User, Source (image, video, GIF), or Title/Description.

Date Range

2025-01-25 TO 2025-01-31

Select Users

All Users

Select Source

Select Sources

Title

Title

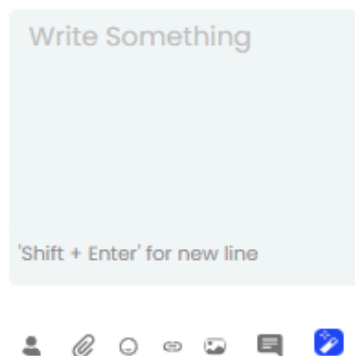
Description

Description

Filter

Using the Media Library in Unibox

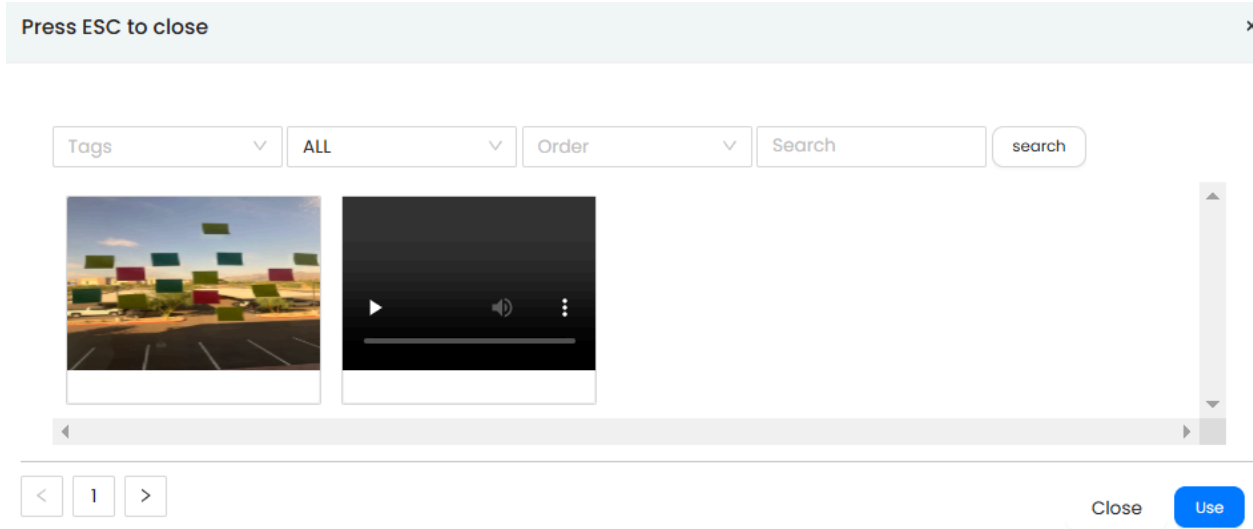
1. While replying to a ticket in Unibox,



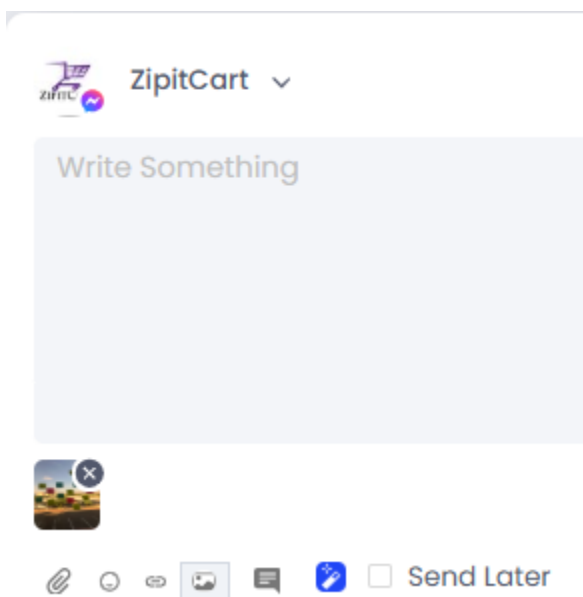
2. Select on the **Media Library** option.



3. Select the required media file. Select **Use** to save.



4. Insert the media directly into your ticket reply.



5. Select save?

Subqueries

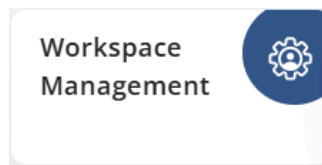
Subqueries allow you to organize data within a profile by creating separate channels based on specific keywords.

Navigate to Subqueries

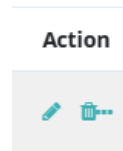
1. Go to **Settings**.



2. Select **Workspace Management**.



3. **Select the pencil icon**, under the Action section.



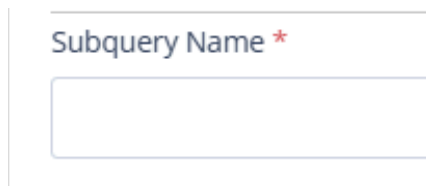
Create a New Subquery

1. Select **+Add** to the right of Add Subqueries.



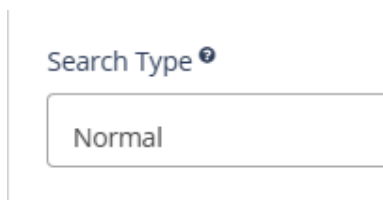
Define Subquery Details

1. Give your **Subquery** a name



Subquery Name *

2. Select **Search Type**:



Search Type ?

Normal

3. **Xbert Tip:** Disabling stemming will exclude variations of a word (like "fishing," "fished") from search results. Selecting a specific language will improve search accuracy for that language.

Keywords/Phrases

1. Enter keywords separated by commas.

Words to track * ⓘ

2. Enter Key Words into **Containing all of these words** to highlight messages with all specified keywords.

Containing all of these words: ⓘ

3. Enter Key Words into **Containing any of these words** to highlight messages with at least one keyword.

Contain any of these words: ⓘ

4. Matches messages without the specified keywords.

Not containing these words: ⓘ

5. Select the **Location**.

Select location

United States ×

Xbert Tip: You are able to select if you want the location to be inverted or to apply location.

Invert Location ⓘ ☐

Apply Location ⓘ ☐

6. Select what **Languages**.

Select language

English ×

Invert Language ⓘ ☐

7. Select Applicable Sources: Choose which sources to apply the subquery to (e.g., social media, news feeds, etc.).

Receive Mentions

X ☒ Blogs ☒ News ☒ Youtube ☒ Discussion ☒ Tumblr Blogs ☒

8. Select **Save** to create the subquery.

Save

View Subqueries

In the Workspace: View created subqueries within the Subquery section of the profile.



Spam Word Settings

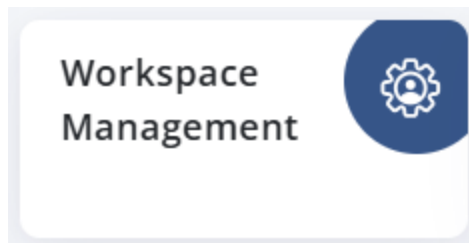
Spam word settings enable filtering of posts or comments containing predefined words, helping to remove unwanted content. Both features enhance content management and analysis.

Navigate to Spam Word Settings

1. Go to **Settings**.



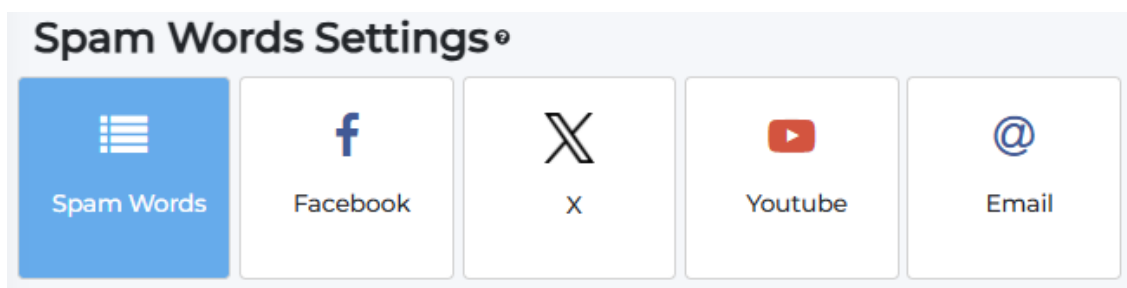
2. Click on **Workspace Management**.



3. Select the **Pencil icon** to the right.

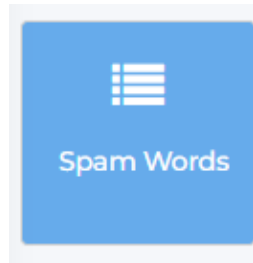


4. Go to **Spam Words Settings**.

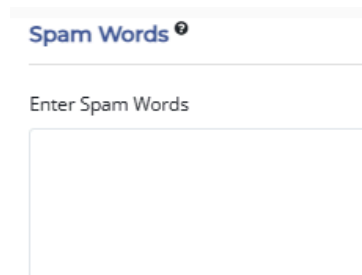


Add Spam Words

1. Select **Spam Words**.



2. Enter the words you want to flag as spam (one per line).

A form with a header "Spam Words" and a sub-header "Enter Spam Words". Below the sub-header is a large, empty text input area.

3. Select **Update** to save the updated spam word list.



Suggested Responses

Suggested Responses are a great way to save time and maintain consistency in your customer communications. Use them to create a library of pre-written replies for common inquiries, ensuring your team provides quick and accurate responses every time.

Access Suggested Responses

1. Go to **Settings** from the left-hand toolbar.
2. Select **Publish Settings**.
3. Choose **Managed Saved Responses** from the options.

Create a New Response

1. Select the **Create Response** button.
 2. From the dropdown, select the **Workspace** where you want this response to be available.
 3. Select the appropriate **category** for your response.
- XBert Tip:** Make sure you've created categories beforehand in Settings.)
4. Enter a clear and descriptive **Response name** for easy identification.
 5. Choose the **channels** (e.g., Social, Email, Chat) where you want this response to be suggested.
 6. In the provided text area, write the actual **response** you want to save.
 7. Add Tags and Sentiment:

- **Tags** help organize and filter your responses.
- A **Sentiment** (Positive, Neutral, Negative) can be assigned to the response.

8. Once you've filled in all the necessary details, click on the **Save** button.

Editing a Suggested Response

1. Go to **Settings** from the left-hand toolbar.
2. Select **Publish Settings**.
3. Choose **Managed Saved Responses** from the options.
4. Find the suggested response you want to edit in the list.
5. Select the **pencil icon** next to the response you wish to modify. This will open the response in edit mode.
6. Make Your Changes. You can edit any of the following:
 - **Response Name:** Update the name if needed.
 - **Category:** Change the category if it's been miscategorized or you've created new categories.
 - **Response Source(s):** Adjust the channels where this response should be suggested.
 - **The Response itself:** Modify the text or content of the saved response.
 - **Tags:** Add, remove, or edit tags associated with the response
 - **Sentiment:** Change the sentiment assigned to the response (Positive, Neutral, Negative).
7. Once you're done editing, select **Save**.

Publishing and Response Management: A Step-by-Step Guide

This section helps you streamline communication and improve customer interactions within the platform.

Publish Settings

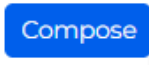
Control Content Sharing

This section allows you to define rules and configurations for how and when content is shared with customers.

1. Go to **Publish**.



2. Select **Compose** to create a new item to be published online.

A blue rectangular button with the word "Compose" in white text.

Compose

3. Select the **Channels** to be Published on.

Select Channels

- ☐  Twitter
 - ☒  Facebook Pages
 - ☐  Youtube
 - ☐  LinkedIn
 - ☐  Instagram
 - ☐  Google Business
 - ☒ Select Workspaces
-
- ☒  ZipitCart

4. Write your **Post**.

Your Post

WE HAVE NEW ITEMS!!!!



5. Select if you want to **Publish Immediately, Schedule, or Save as a Draft.**

☐ Post Immediately ☒ Schedule ☐ Save as draft

Select Date and Time

2025-01-27 09:18 AM  (GMT -7:0) Mountain Standard Time (America/... ▼

Xbert Tip: You can set up workflows to automatically publish certain types of information.

6. Preview your Publication before publishing



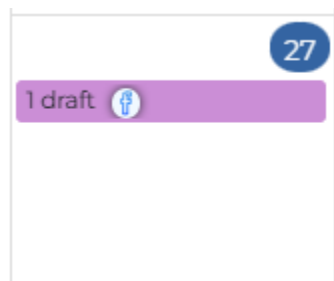
7. Select either **Publish Now** to publish the post immediately, or **Schedule** to determine a later time that the post will be published.

Publish Now

Schedule

Save Draft

XBert Tip: Save Draft saves the unpublished post onto your calendar by color coordination.



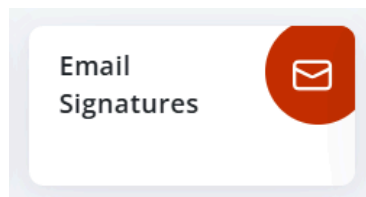
Email Signatures

Create a Signature

1. Go to **Settings**.



2. Select **Email Signatures**.



3. Select **Create Email Signature**.



4. Enter a **Title** (e.g., Default Signature).

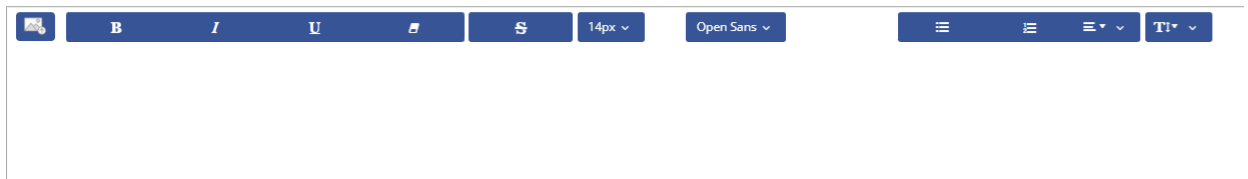
Title *

5. Add an optional **Description**.

Description

6. Compose your **Signature Content**.

Email Signatures



The image shows a horizontal toolbar for an email signature editor. It includes icons for inserting an image, bold (B), italic (I), underline (U), strikethrough (ABC), subscript (x₂), and superscript (x²). There are also dropdown menus for font size (14px) and font family (Open Sans). On the right side, there are icons for bulleted list, numbered list, and a text color dropdown (T).

7. Select **Save**.



8. You can see your saved **Signatures** on the **Signatures** page.

EMAIL SIGNATURES + Create Email Signature

SETTINGS / EMAIL SIGNATURES

Show 10 entries Search:

Title	Description	CREATED BY	Created On	Actions
test	Test	Carra Scarbrough carra.scarbrough@lab.nexvia.com	02:38 PM Mon, Jan 27	 
Title	Description	CREATED BY	Created On	Actions

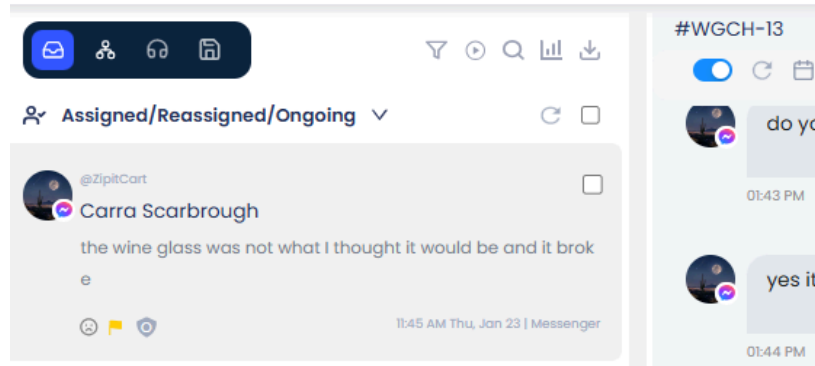
Showing 1 to 1 of 1 entries Previous Next

Using Your Signature When Replying to an Email

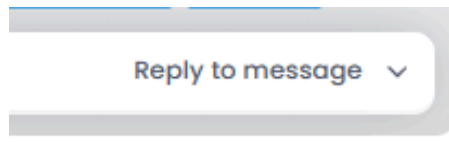
1. Start the Reply Process by selecting the **Unibox**.



2. Select the **Reply** you are responding to.



3. Select **Reply to Message** in the bottom right corner.



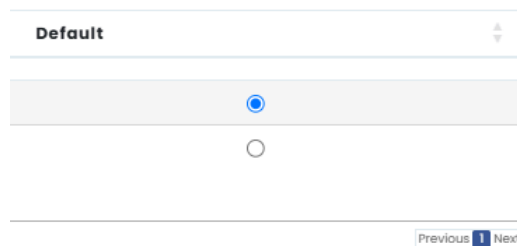
4. Select Your Signature by selecting **Add Notes and Escalations**.



5. Select the **Letter** icon in the bottom left corner.



6. Choose your desired signature from the list.



7. If you want to use this signature consistently, confirm it as the **Default**.



8. **Close the Signature Window:** Click **Close the Email Signature**.



9. Compose and Send:

- a. Write your **reply** and address it to the recipient.

Add Notes

Escalation x

To *

cc bcc

Subject

Poppins Normal 14 B I U   

Write Something

Cancel Send

10. Select **Send**.

Troubleshooting

Below are the most common troubleshooting issues and how we troubleshoot.

Please reach out to Nextiva Support if the issue persists by submitting a ticket. We're happy to help you troubleshoot and get your NextivaCX and running smoothly!

Essential Workspace Setup

To ensure your NextivaCX workspace is ready to handle customer interactions, there are a few key elements you'll need to configure:

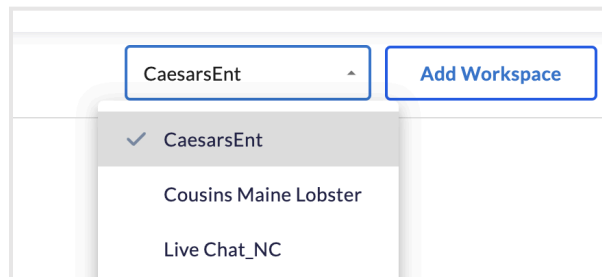
- **At Least One Social Media Channel:** Connect at least one of your social media accounts (Facebook, X, Instagram, etc.) to your workspace.
- **An Organizer with Rules:** The Organizer helps automate your workflow by routing incoming messages and assigning cases.
 - **Automatic Creation:** In most cases, an Organizer is automatically created when you set up a new workspace.
 - **Manual Creation:** If you don't see an Organizer, you can easily create one manually.
 - **Essential Rules:** Create at least one rule for each connected channel (social media, messaging app, email) within your workspace.
 - **Rule Conditions:** Each rule should have the condition "All mentions" set to "Include."
 - **Rule Actions:** Each rule should also have an action to assign incoming interactions to a specific Workbasket.
- **A General Workbasket with Users**
 - **Create a Workbasket:** If you don't have one already, create a "General" Workbasket to handle unassigned or general inquiries.
 - **Add Users:** Assign at least one user to the Workbasket.
 - **Confirm Access:** Ensure that the assigned users have access to the workspace where the Workbasket is located.

Chatbot is Not Working

Are You in the Right Workspace?

Each chatbot is linked to a specific Live Chat, and you can only have one Live Chat per workspace. If you have multiple Live Chats on different websites or pages, make sure you're working in the correct workspace.

1. Go to the **Home** screen.
2. Select the **Onboarding** tab.
3. Check the **workspace name** at the top. Is this the workspace associated with the website where you're having trouble with the chatbot?



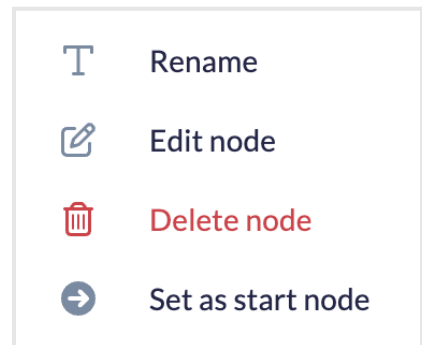
Is the Correct Chatbot Activated?

If you've created multiple chatbots, double-check that the right one is selected for your Live Chat.

1. Go to the **Home** screen.
2. Select **Live Chat**.
3. Select **Add Live Chat** (or edit your existing one).
4. Go to **Advanced Options** and select **Chatbot**.
5. Verify that the chatbot selected here matches the one you want to use.
6. For further confirmation, go to **Settings** and select **Chatbot Configurations**. Check the active chatbot for your Live Chat.

Confirm the First Node in Flow is Start Node

1. Select **Settings**.
2. Select **Chatbot Configuration**.
3. Select the three ellipses.
4. Select **Edit Chat Flow**.
5. Select the first node in the chatbot builder.
6. Select the ellipses.
7. Select **Set** as start node.



Can't Connect Your Instagram or Facebook Page?

If you're having trouble connecting your Instagram or Facebook page to NextivaCX, even after entering your credentials, follow the below steps.

Select Instagram business accounts



Page	Action
No Instagram Pages found	
Skip Done	

Ensure You Have a Business Page

- NextivaCX requires a **business Instagram page** to connect, not a personal profile.
- You'll also need a **business Facebook page** linked to your Instagram account.

Sharing Your Ideas: Submitting Feature Requests

We value your feedback and are always looking for ways to improve NextivaCX. If you have an idea for a new feature or enhancement, you can easily submit a feature request right within the platform.

Submit a Feature Request

1. Select the **question mark icon** in the bottom left corner of your NextivaCX screen.
2. In the text box provided, describe your feature request in detail. Be as specific as possible about the functionality you'd like to see and how it would benefit your workflow.
3. Scroll down and you'll see a disclosure directing you to our support team. If you're ready to submit your feature request, click the appropriate button or follow the instructions provided.

We appreciate your input!

Your feedback helps us shape the future of NextivaCX and ensure we're delivering the features and functionality you need to succeed.

Note: While we review all feature requests, we can't guarantee that every suggestion will be implemented. However, we take your feedback seriously and use it to guide our development priorities.