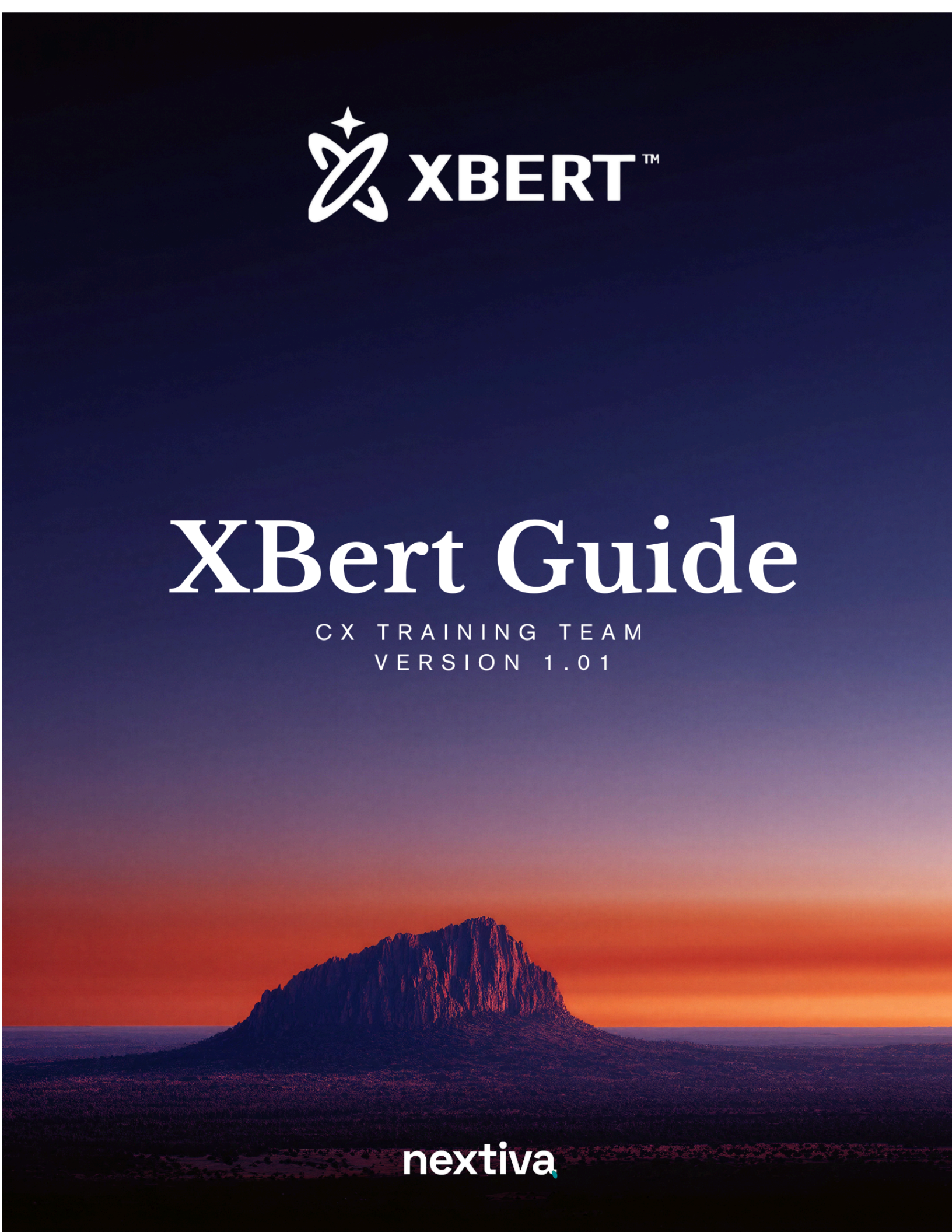




XBert Guide

CX TRAINING TEAM
VERSION 1.01

A wide-angle photograph of Uluru, a large sandstone rock formation in the heart of the Northern Territory of Australia. The rock is silhouetted against a vibrant sunset sky with shades of orange, red, and purple. The foreground shows a dark, flat landscape with sparse vegetation.

nextiva

Build, launch, and improve your AI Employee with confidence.

This guide walks you through everything you need to get started with XBert AI—from initial setup to ongoing optimization—so you can deliver a consistent, high-quality customer experience across every channel.

What is XBert AI?

XBert is an AI-powered employee that helps businesses stay connected with customers across voice, SMS, and live chat.

It handles conversations, answers questions, and supports customers 24/7 while seamlessly handing off to a human when needed. Your AI works alongside your team, not as a replacement, ensuring customers can always reach a person if needed.

How XBert Works

To successfully set up your AI Employee, it's important to understand how training works:

Training your AI = Skills + Knowledge Base

- **Skills** define what your AI can do
(e.g., answer questions, capture leads, book appointments)
- **Knowledge Base** provides the information your AI uses to respond
(e.g., your services, FAQs, policies, and business details)

Together, these determine how your AI behaves and how accurately it responds to customers.

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Welcome to the XBert AI Guide!

This guide is your primary resource for setting up and managing XBert, an AI-powered employee designed to handle customer interactions across voice, SMS, and live chat.

Whether you're configuring XBert for the first time or refining an existing setup, this guide provides step-by-step instructions for building, training, and managing your AI Employee.

What This Guide Covers

In this guide, you will learn how to:

- Set up and customize your AI Employee
- Train your AI using Skills and a Knowledge Base
- Test and launch your AI across multiple channels
- Configure calling, SMS, and live chat
- Monitor conversations and performance
- Troubleshoot issues and improve response quality

How to Use This Guide

You don't need to read this guide from start to finish. Use the sections that match what you're trying to do:

- Getting started and completing setup
- Training your AI to respond accurately
- Testing performance before going live
- Fixing incorrect or incomplete responses
- Improving your AI over time

Before You Begin

There are two ways to get started:

- **[Quick Start XBert AI Guide](#) (Recommended for most users):**
Follow a simplified setup path to create, train, and launch your AI Employee quickly.
- **This Guide (Full Setup & Administration):**
Use this guide for detailed configuration, advanced features, and ongoing management, including topics like channel setup, reporting, and SMS registration (10DLC).

After Setup: Optimize Your AI

Once your AI Employee is live, you can continue improving its performance using the [XBert AI: Test, Fix, and Improve Your AI Guide](#).

This companion guide helps you:

- test real customer scenarios
- troubleshoot issues quickly
- refine responses and workflows over time

Who Should Use This Guide

This guide is designed for:

- business owners and administrators
- teams responsible for setup and configuration
- users managing customer communication and workflows

Whether you're launching your first AI Employee or refining an existing setup, this guide will help you get the most out of XBert AI.

Sign In

From Email

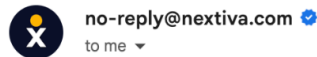


Hello,

Your username is:

Get started

1. You will receive an email invitation from Nextiva (noreply@nextiva.com) to access your XBert AI Employee.
It is titled “___ invited you to use Nextiva”.



2. Grab the provided username, if needed.

Your username is:

3. Select **Get started** to begin setting up your account.

Get started

4. Enter and confirm your new password.



English

Set your password

Passwords expire every 90 days and can't match your last four.
Create a new one to keep your account secure.

Enter password



Re-enter password



Your password must contain:

- ☒ At least 15 characters
- ☒ One number (1, 2, 3...) (1, 2, 3...)
- ☒ Upper and lowercase letters

5. Select **Reset your password**.

Reset your password

6. Select Go to sign in.

Go to sign in

7. From the **sign in screen**, enter your login credentials to sign in to your account.



English

Sign in

Enter email address

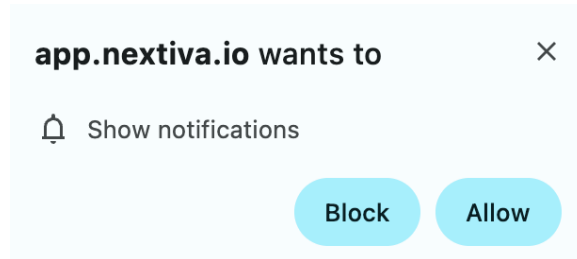
Enter password



8. Select **Sign in**.

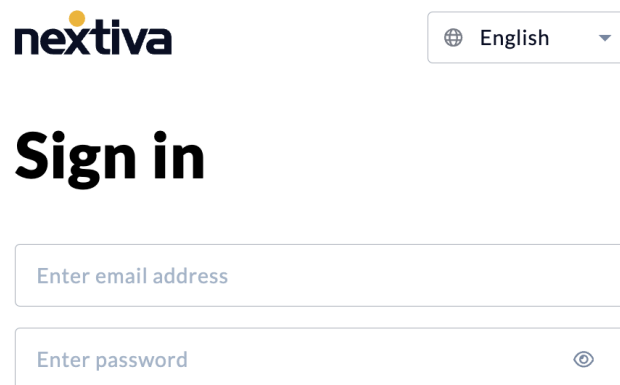


9. Allow Browser Permissions.



From Website

1. Go to <https://app.nextiva.io/lioncc/>.



2. Enter your email address.

XBert Tip: If unsure, try your business email. If that does not work, ask your administrator to resend the [welcome email](#).

3. Select Forgot password.

[Forgot password](#)

- 4.

5. Enter and confirm your new password.



English

Set your password

Passwords expire every 90 days and can't match your last four.
Create a new one to keep your account secure.

Enter password



Re-enter password



Your password must contain:

- ☒ At least 15 characters
- ☒ One number (1, 2, 3...) (1, 2, 3...)
- ☒ Upper and lowercase letters

6. Select **Reset your password**.

Reset your password

7. Select Go to sign in.

Go to sign in

8. From the **sign in screen**, enter your login credentials to sign in to your account.



English

Sign in

Enter email address

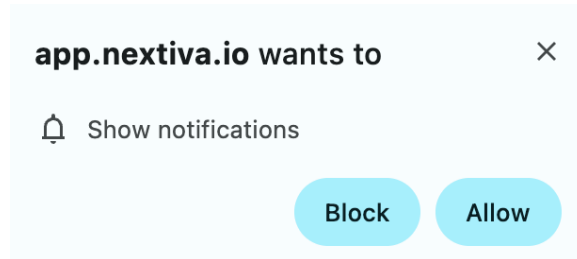
Enter password



9. Select **Sign in**.



10. Allow Browser Permissions.

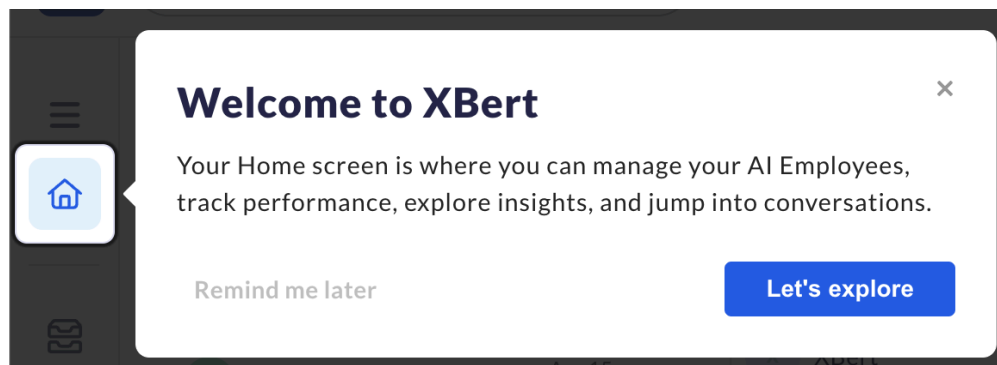


Onboarding Wizard

Welcome to XBert

When you first log in, XBert provides a guided walkthrough to introduce the platform and help you get oriented. It highlights key areas such as where to manage your AI Employee, monitor activity, and view performance insights.

Select **Let's explore** to begin, or **Remind me later** to skip and return to it at any time.



Customize your AI Employee

Define how your AI sounds, what it does, when it works, and where it responds. These settings shape the overall customer experience when interacting with your AI.

AI Employees

New AI Employee

Name	Channels	Skills	Status	
 XBert		1 skills	Active	Add skills

DashboardView all

Business messaging registration (10DLC)

CALLING

No data found

Customize your AI Employee

Choose how your AI Employee sounds, what they do, when they work and where they respond. You control how you want your AI Employee to operate.

Step 1 of 4

Next

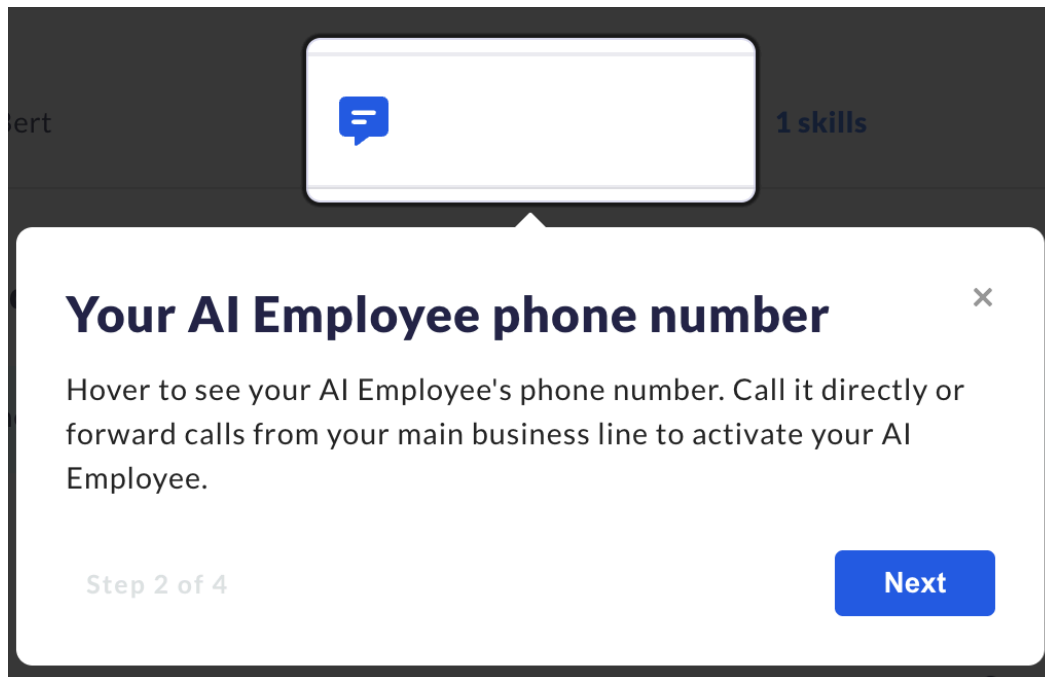
Last 7 days

Register

0

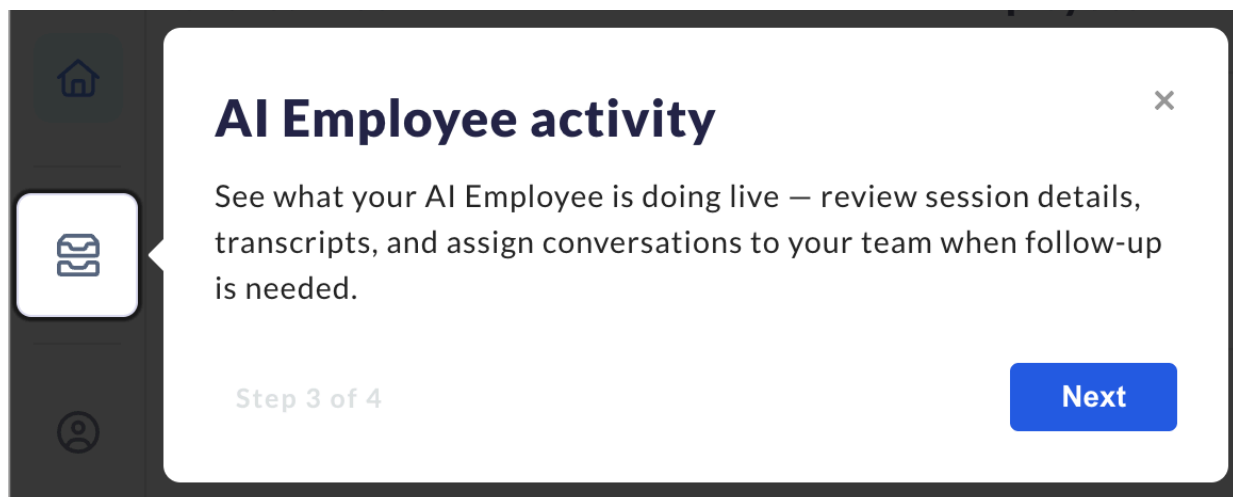
Your AI Employee phone number

Access your AI Employee's phone number and begin testing calls or forwarding your business line.



AI Employee activity

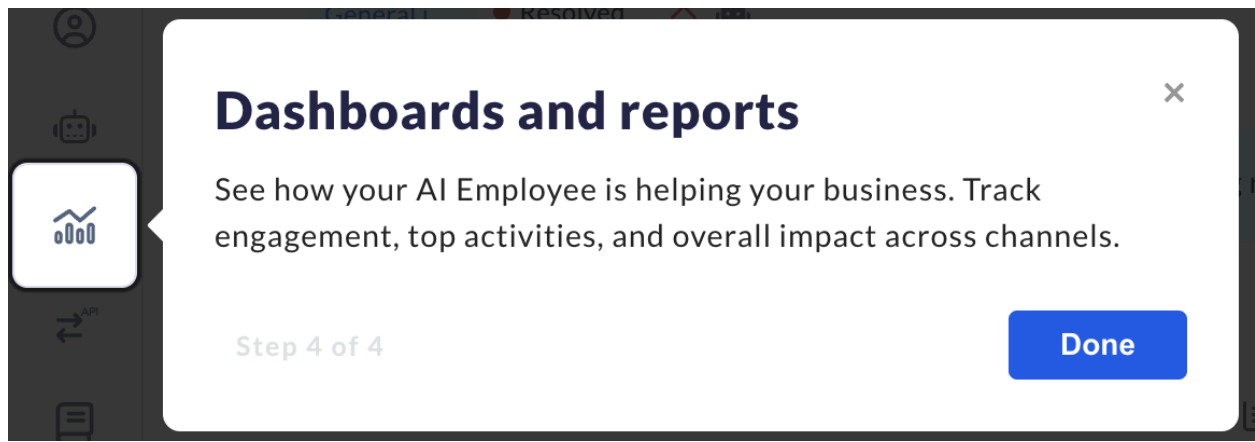
Monitor conversations in real time, review transcripts, and assign follow-ups when needed.



Dashboards and reports

Track performance, engagement, and overall activity across your channels. These insights help you understand how your AI is performing and where improvements may be needed.

Select **Done** to complete the walkthrough. You can return to these areas at any time to make updates or improvements.



Basic Onboarding

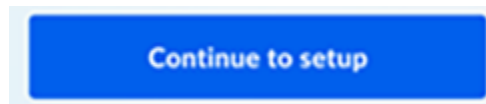
Once finished, your AI Employee will be equipped to handle receptionist tasks, support inquiries, and FAQs, ready to start working for your business.

Account Setup

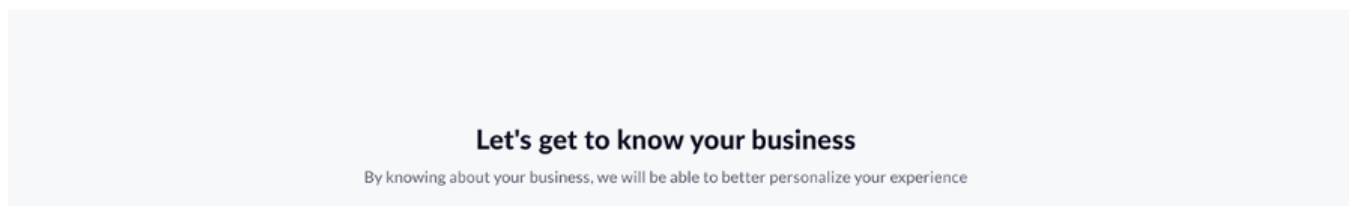
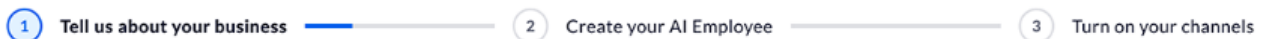
You'll receive an email invitation to set up your standalone XBert account.



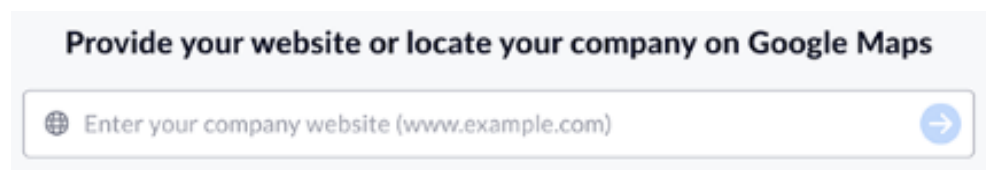
1. Once you arrive on the welcome page, select **Continue to setup** to begin.



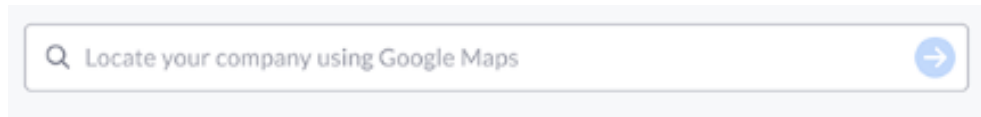
2. Enter your company information in one of the following ways:



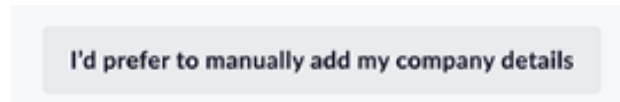
- a. Enter **your company website** in the first field, then select the blue arrow to continue.

A light grey rectangular box. It contains the heading "Provide your website or locate your company on Google Maps" in a bold, black font. Below it is a text input field with a placeholder text "Enter your company website (www.example.com)". To the left of the input field is a small globe icon. To the right of the input field is a blue circular button with a white right-pointing arrow.

- b. Or, you may find your business using Google Maps in the second field, then select the **blue arrow button** to continue.

A search bar with a magnifying glass icon on the left and a blue arrow icon on the right. The text inside the bar reads "Locate your company using Google Maps".

- c. Or, select **I'd prefer to manually add my company details.**

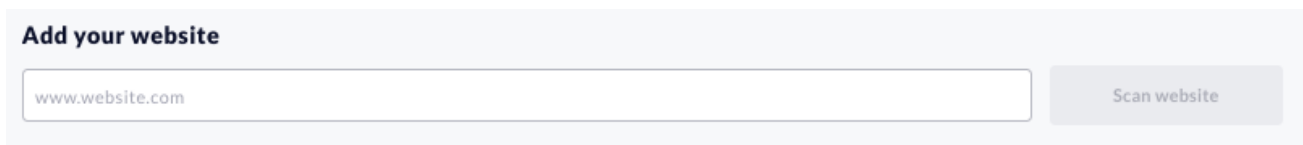
A rectangular button with a light gray background and a darker gray border. The text inside the button is "I'd prefer to manually add my company details".

XBert Tip: This information is used to help your AI understand your business and generate responses for customers.

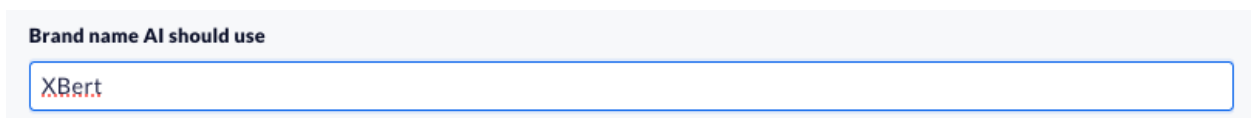
Manually Add Company details (Optional)

Provide your AI Employee with key information about your business so it can respond accurately to customers. The quality of this information directly impacts how well your AI answers questions.

1. Enter your **website URL** (optional), then select **Scan website** to auto-fill details if desired.

A form section titled "Add your website". It contains a text input field with the placeholder text "www.website.com" and a button labeled "Scan website".

2. Enter the **brand name** your AI should use when interacting with customers.

A form section titled "Brand name AI should use". It contains a text input field with the text "XBert" entered.

3. In the **business overview** field, describe your business, including services, FAQs, and key details. Think of this as the foundation your AI will use to explain your business to customers.

4. Select **Click to add our example template into this field** to populate a structured outline (Optional)

Give your AI an overview of your business

Tell your AI what to say about your business, including your offerings, FAQs, and key details.

Not sure where to start? [Click to add our example template into this field](#)

Business overview
Briefly describe what your business does and who it's for.

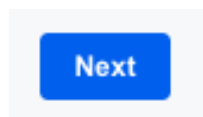
Contact information
Business name:
Address:
Phone number:
Email:
Website:

Business hours
List your hours for each day of the week.

5. Update the template with your own information, such as:
 - a. Business overview
 - b. Contact information (name, address, phone, email, website)
 - c. Business hours
 - d. Review and edit the information in the Give your AI an overview of your business field as needed. The more clear and detailed this is, the more accurate your AI's responses will be.

XBert Tip: Any missing or unclear information here may lead to incomplete or incorrect responses from your AI.

6. Select **Save** to apply your changes.



- Please review the company information for accuracy, as this helps XBert learn more about your business. Using the website or location you provided on the previous step, XBert will prefill your company details for you. If you selected “Manually add my company details” in the previous step, you may **fill in the fields here**.

Confirm your business details

We've pre-filled your details. Take a moment to confirm it's correct.

Company name ⓘ

Lucky Spoon LLC DBA Lucky Spoon

Industry * ⓘ

Retail ▼

Website

www.acmecompany.com

Timezone *

Phoenix, AZ (GMT-7) ▼

Business hours ⓘ

Mon-Fri 9:00am-5:00pm, Sat-Sun Closed

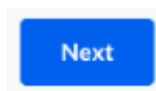
Edit hours

Holiday hours

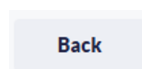
All US Federal Holidays 📅

Add holiday

- Select **Next** in the bottom-right corner to continue.



- If your company details don't appear correct, adjust them manually here, or select **Back** in the bottom-left corner.

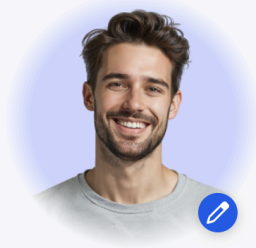


Design how your AI employee presents itself

After you've entered your company details, the next step is creating your AI Employee. This will be your AI agent to help assist with customer interactions.

Design how your AI employee presents itself

Choose the name, face, voice, and tone that will represent your brand.



A circular portrait of a smiling man with short brown hair and a beard, wearing a grey t-shirt. A blue pencil icon is in the bottom right corner of the image.

Pick your AI's image

This image will appear to customers in live chat and in your message history.

Give your AI a name *

Peter

What languages should your AI speak? *

English

What should I sound like? *

Agile Voice

 Play

Default greeting ?

Hi, my name is Peter. I'm an AI employee from .

[Save & exit](#) [Next](#)

Customize appearance

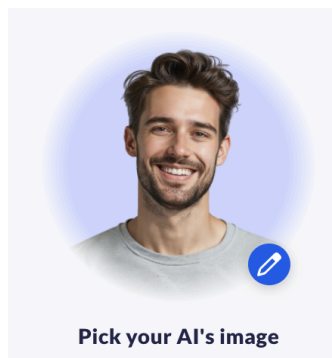
Choose an image that represents your brand, as it will be visible to customers in live chat and throughout your message history. You can select from available stock images or upload your own preferred image to create a consistent and professional customer experience.



 Customize appearance

Choose an image

1. Select the **pencil icon** on the avatar to open the image selection window.



2. Browse available **image options** by category such as Casual, Business Casual, or Trade.

Select how I look

×

This will be the face representing your brand

Casual





Business Casual



Trade



3. Select an **image** by clicking on your preferred option.
4. Select **Save** to apply the image, or **Cancel** to exit without changes.

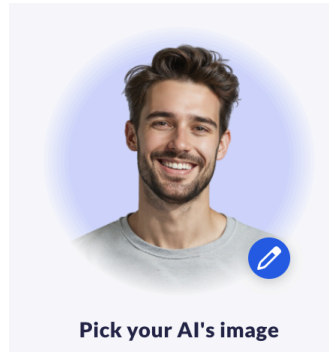
Cancel

Save

Upload your own image

You can upload a custom image to better match your brand.

1. Select the **pencil icon** on the avatar.



2. Select **Upload my own.**



3. Choose an **image file** from your device.
4. Select **Open.**

5. Position the image by dragging the image so that it is centered in the circle, or zoom to adjust your image.

Edit image



Drag or zoom to adjust your image



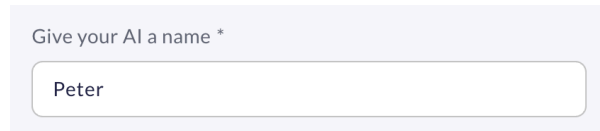
6. Select **Save** to apply the image, or **Cancel** to exit without changes.

Cancel

Save

Additional AI employee details

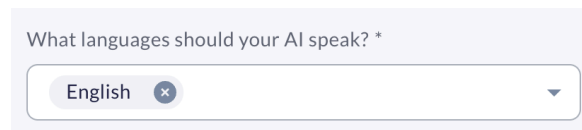
1. Enter a **name** in the text box under “Give your AI a name.”



Give your AI a name *

Peter

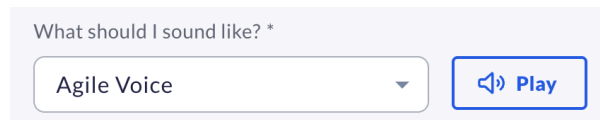
2. Select **language(s)** from the dropdown under “What languages should your AI speak?”



What languages should your AI speak? *

English ×

3. Choose a **voice** from the dropdown under “What should I sound like?” and select **Play** to preview it.

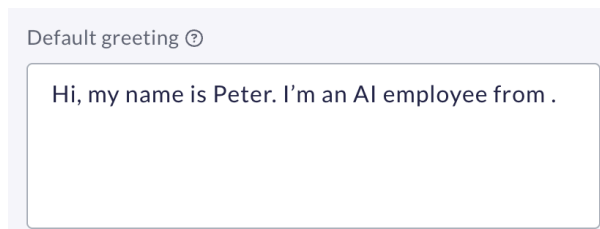


What should I sound like? *

Agile Voice

Play

4. Enter or edit the **default greeting** in the text box to define how your AI Employee introduces itself.

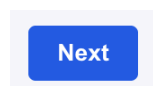


Default greeting ⓘ

Hi, my name is Peter. I'm an AI employee from .

XBert Tip: This is the first message customers will see or hear, so it should clearly represent your business.

5. Select **Next** to continue.



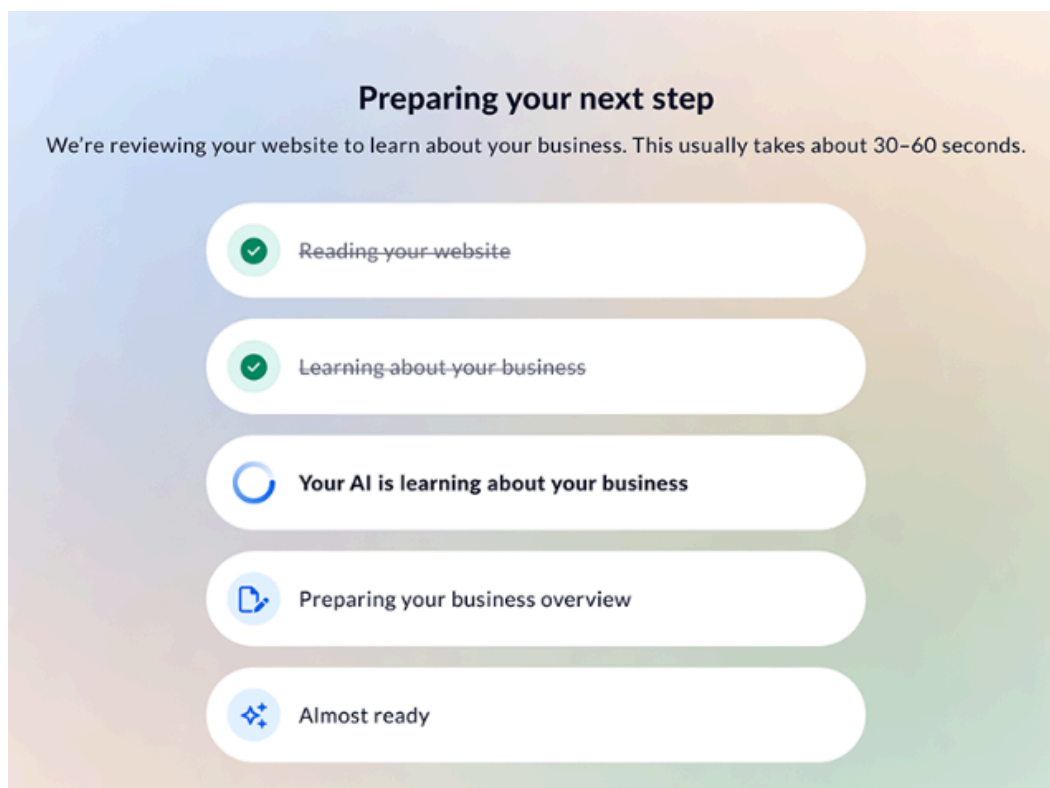
Next

Preparing the AI

After entering your AI Employee's basic information, XBert uses those details to automatically build the next steps tailored to your business. This is where your AI begins learning how to respond based on your business information. During this process, your AI reviews your website and business information to better understand how to support your needs.

If you are creating your first AI Employee or adding another, you may see a progress screen showing steps like reading your website, learning about your business, and preparing your business overview.

This process typically takes about 30 to 60 seconds. During this time, your AI is analyzing your business data to prepare responses.



XBert Tip: If you didn't enter a website or Google map, you won't see the progress screen. You will continue to the next page without this progress bar.

Confirming Business Details

On the following page, review what your AI Employee has learned about your business. This step is important because it directly affects how your AI answers customer questions, and is a key step to ensure your AI has accurate information before interacting with customers.

The onboarding process prompts you to confirm and refine key details your AI will use when interacting with customers.

Sync Your Website

1. Review the website URL to ensure it is correct.

Brand name AI should use

2. Check the **Last synced** timestamp to see when your website information was last updated.

Last synced: Today at 1:52 PM

3. Select **Update** to resync and pull the latest data from your website.

 **Update**

Change Your Website

1. Select **Change** to enter a new website URL.

 **Change**

2. Type the new, complete website address into the text box.

Scan website

3. Select Scan Website to have the AI rescan for information. After entering your AI Employee's basic information or updating your website, XBert uses that data to build the next steps tailored to your business. Your AI reviews your website and business details to generate a business overview.

If a website or Google listing is provided, you may see a short progress screen while XBert gathers this information. This process typically takes 30 to 60 seconds.

XBert Tip: If no website or Google listing is entered, you will skip the progress screen and continue to the next step.

AI overview of your business

XBert automatically generates a summary of your business using information from your website. Your AI Employee uses this overview to answer questions, describe your services, and interact with customers.

Give your AI an overview of your business
Here's what we pulled from your website. Your AI uses this to talk about your business, answer FAQs, and describe what you offer.

Nextiva Academy provides tailored learning trails and guides to help users understand and utilize the Nextiva platform, which offers AI-powered customer experience management solutions including business phone, contact center, and unified CX.

Contact Info
Company Name: Nextiva Academy

Company Address: 9451 E Via De Ventura, Scottsdale, Arizona 85256, United States

Company Phone: +1 800-799-0600

Working Hours
Working days: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday
Nonworking days: null
Working hours:
1) Monday: open from 12 AM to 12 AM
2) Tuesday: open from 12 AM to 12 AM
- -

2619 / 20000

1. Review the **business overview** generated from your website.
2. Scroll through the **text box** to see all included details, such as services, contact information, and company description.
3. Edit the **text box** to correct, remove, or add important details about your business, products, or FAQs.
4. Ensure the information is clear and accurate, as your AI Employee will use this to communicate with customers. Incorrect or unclear details here may result in inaccurate responses.
5. Select **Next** to continue, or **Save & exit** to finish later.

Next

Train your AI

Training is what determines how your AI Employee behaves and how well it responds to customers. **Better training leads to more accurate responses and fewer escalations to human agents.**

Train your AI's skills

Skills are the tasks your AI can perform to help customers, such as booking appointments or managing orders.

 **Add & train skills**


Add skills

 **Appointment Skill** 

For booking, rescheduling, and canceling appointments while validating details and...

REQUIRED APPS    Calendar

 **Add skill**

 **Trained skills**

 **Receptionist** 

This is the always-on, human-like first point of contact. Responsible for greeting callers, inferring intent, seamlessly routing or... escalating queries to the right skill or human.

 **Lead Generation Skill**   

For handling user queries using the attached website and capturing potential customer interest when users express intent to... purchase, inquire about partnerships, pricing, growth, or request personalized quotes or customizations.

Your AI is trained using two key parts:

- **Skills** — tell your AI what to do and how to handle conversations. Skills control the actions your AI can take during a conversation.
- **Knowledge Base** — gives your AI the information it uses to answer questions. The more complete your Knowledge Base, the more confidently your AI can respond.

For example, a skill might guide your AI to book an appointment or capture a lead, while the Knowledge Base provides the details it needs to answer questions about your services.

Version 2.01 © Nextiva

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What Good Training Looks Like

The quality of your training directly impacts how your AI Employee performs.

Effective training is:

- **Clear** — Instructions and content are easy to understand
- **Specific** — You define exactly how the AI should respond or act
- **Complete** — All key information and common scenarios are covered

Skills control how your AI behaves, while the Knowledge Base provides the information it uses to respond. Both need to be accurate and well-defined for the best results.

For examples and best practices, refer to the [Skills](#) and [Knowledge Base](#) sections.

Troubleshooting Your AI

If your AI is not performing as expected, review your training first:

- **AI is not answering questions correctly**
→ Review and improve your Knowledge Base content
- **AI is not following the expected flow or behavior**
→ Update your skill instructions to be more specific
- **AI is not triggering actions (e.g., booking, capturing leads)**
→ Confirm the correct functions are included and referenced in your skill

For step-by-step instructions on how to make updates, see the **Quick Fixes section** below or refer to the [AI Optimization Guide: Test, Fix, and Improve your AI.](#)

Quick Fixes

Use these steps to update your AI when something is not working as expected.

Update your Knowledge Base

You can update your Knowledge Base from the [main menu](#) or through your [AI Employee](#).

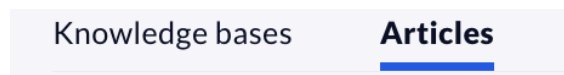
Access through Knowledge Base Tile

Updating through your Knowledge Base Tile is best for editing content, managing articles, or creating a Knowledge Base.

1. Select the Knowledge Base Tile on the left side menu.

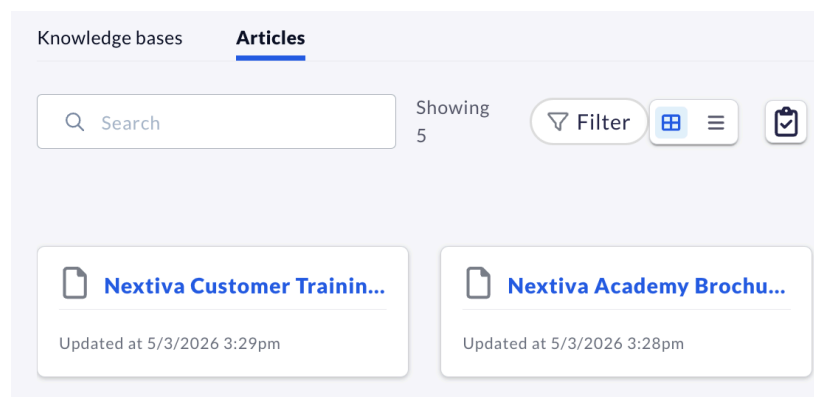


2. Select the Knowledge Base or Article tab.



Edit an existing article

1. From the Articles tab, select the article.



2. Make your updates.
3. Select **Save**.

Add a new article

1. From the Articles tab, select **Add article**.



Add article

2. Enter your content.
3. Select **Save**.

Confirm a Knowledge Base is connected to an AI Employee

1. From the Knowledge Base tab, select the Knowledge Base block.

Nextiva Academy Brochure

Added 5/3/2026 3:27pm

 **Nextiva Customer Training ...**

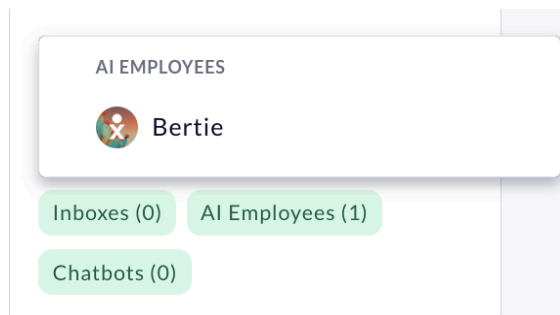
Linked to

Inboxes (0)

AI Employees (1)

Chatbots (0)

2. Hover over the AI Employee to see which AI Employee is connected.



XBert Tip: If there is no AI Employee connected, the green tab will not populate. [Access through AI Employee](#) to add to the specific AI Employee.

Edit an existing Knowledge Base.

1. From the Knowledge Base tab, select the Knowledge Base block.

Nextiva Academy Brochure

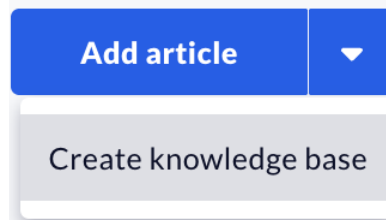
Added 5/3/2026 3:27pm

 **Nextiva Customer Training ...**

2. Make changes as needed.
3. Select **Save**.

Create a new Knowledge Base

1. From the Knowledge Base tab, select the dropdown next to **Add Article**.



2. Select **Create knowledge base**.
3. Enter the required details.
4. Select **Save**.

XBert Tip: If you have more than one AI employee, hover over the knowledge base's linked AI Employee to see who is connected.

Access through AI Employee

Updating through you AI employee is best for connecting the Knowledge Base to a specific AI employee or verifying that the Knowledge Base is being used.

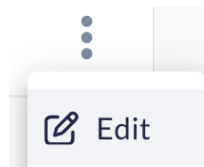
1. Select your AI Employee.



2. Locate the AI Employee.

AI Employees							
Search		Showing 2		  		Create new	
AI Employees	Assigned Inbox ↓	Assigned channels ↓	Skills ↓	Updated by ↓	Updated at ↓	Status ↓	↓
 Bertie	General inbox	 	1 skills	Kelsi Wieler	05/03/2026 04:40 PM	Active	
 Peter			0 skills	Kelsi Wieler	04/30/2026 12:37 PM	Draft	

3. Select the **ellipses**.



4. Select **edit**.
5. Go to Train your skills on the leftside menu.



6. Locate the Knowledge Base.
7. Edit or add content
8. Select **save**.

Save

Update your Skills

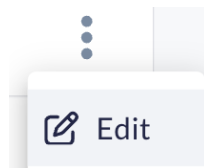
1. Select your AI Employee.



2. Locate the AI Employee.

AI Employees							
Search		Showing 2				Create new	
AI Employees	Assigned Inbox ↓	Assigned channels ↓	Skills ↓	Updated by ↓	Updated at ↓	Status ↓	↓
Bertie	General inbox		1 skills	Kelsi Wieler	05/03/2026 04:40 PM	Active	
Peter			0 skills	Kelsi Wieler	04/30/2026 12:37 PM	Draft	

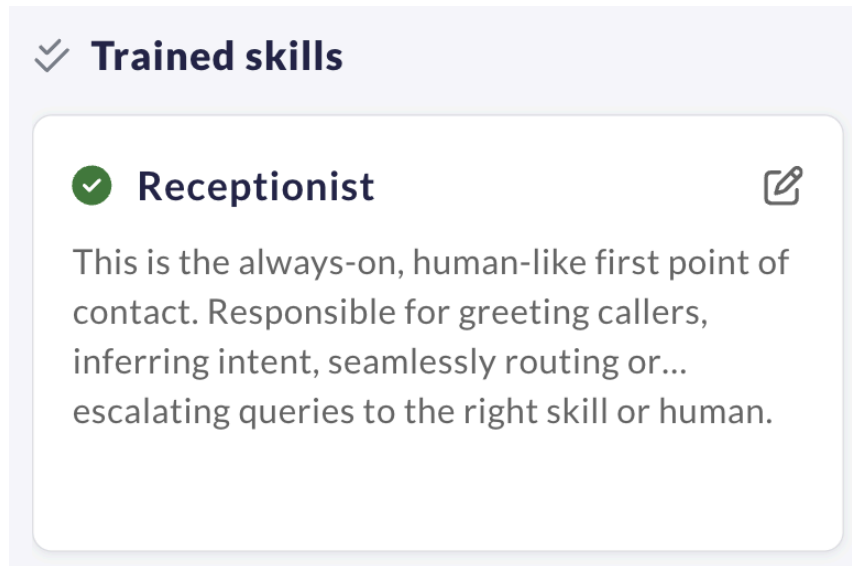
3. Select the **ellipses**.



4. Select **edit**.
5. Go to Train your skills on the leftside menu.

Train your skills

6. Locate the trained skill.



7. Select the **edit** icon.



8. Update the skill as needed, or add more context if none is found.

9. Select **save**.



Check Functions

- 1. Select the AI Employee icon.



- 2. From the menu bar, select Functions.

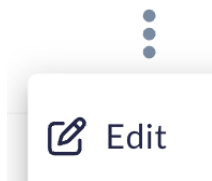
NEXT Studio

f(x) Functions

- 3. Review assigned functions.

Function name	Integration	Updated by	Updated at
go-high-level-get-contact Use this to fetch the contact details using phone number	N/A		04/16/2026

- a. If editing is needed, select the **ellipses**.



- b. Select **edit**.
 - c. Edit the function as needed.
 - d. Select **save**.



Review Escalation Settings

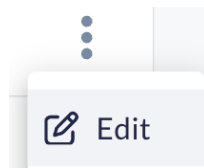
1. Select the AI Employee icon.



2. Locate the AI Employee.

AI Employees							
Search		Showing 2		  		Create new	
AI Employees	Assigned Inbox ↓	Assigned channels ↓	Skills ↓	Updated by ↓	Updated at ↓	Status ↓	↓
 Bertie	General inbox	 	1 skills	Kelsi Wieler	05/03/2026 04:40 PM	Active	
 Peter			0 skills	Kelsi Wieler	04/30/2026 12:37 PM	Draft	

3. Select the **ellipses**.



4. Select **edit**.
5. **Select where your AI will answer customers** (for example, if the AI Employee is a chat bot, go to Live Chat.)
6. Scroll down to **What should happen if your AI can't resolve a request?**

What should happen if your AI can't resolve a request?

Please select at least one*

☒ Send an email summary

☐ Send a text summary

7. Confirm or check fallback options to update as needed.
8. Select Save.



Access Training

Use these steps to access and manage your AI training settings, including Skills and Knowledge Base.

If your AI already has skills

1. Select the **AI Employee icon**.



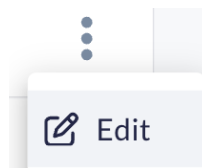
2. Locate your AI Employee.

AI Employees

[New AI Employee](#)

Name	Channels	Skills	Status	
 Bertie		1 skills	Active	Add skills 
 Peter		0 skills	Draft	Add skills 

3. Select the **three dots** (⋮).



4. Select **Edit**.
5. Select **Train your skills** from the left menu.

[✎ Train your skills](#)

If you need to add skills

1. Select the **AI Employee** icon.



2. Locate your AI Employee.

AI Employees

New AI Employee

Name	Channels	Skills	Status	
 Bertie		1 skills	Active	Add skills 
 Peter		0 skills	Draft	Add skills 

3. Select **Add skills**.

Add skills

4. Continue by either [creating a custom skill](#), [using an existing skill](#), or [using a suggested skill](#).

From here, you can update your Skills, Knowledge Base, and other training settings.

Skills

Skills control how your AI Employee handles conversations and completes tasks.

Each skill defines a specific responsibility, such as answering questions, booking appointments, or capturing leads. It also outlines how the AI should interact with customers, including what steps to follow and what information to collect.

Well-written skills ensure your AI responds consistently and takes the right actions during a conversation.

Skills: Good vs. Poor Instructions

The difference between a well-written skill and a vague one can significantly impact how your AI performs.

Good Example

“Help customers book appointments by collecting their name, preferred date and time, and confirming availability before scheduling.”

Why it works:

- Clearly defines the AI’s role
- Includes a step-by-step workflow
- Specifies what information to collect

Poor Example

“Help customers with appointments.”

Why it doesn’t work:

- Too vague
- No defined process
- Missing key details

Create a custom skill

You can create a new skill tailored to your business using either a guided experience or manual setup.

Choose your training method

1. Select **Add Skills**.

Add skills

2. Select **Create custom**.

 **Create custom**

3. Choose your preferred setup method:

- **Guided setup (Recommended):** Walks you through building a skill step by step.
- **Write my own instructions:** Allows you to manually define custom instructions for advanced use cases.

How would you like to do training?



Training your AI is like onboarding a new teammate — you'll show it how to manage the scenarios it'll face day to day.

Recommended



Guided setup

Designed for non-technical users, this helps you build your AI quickly — no prompting skills required.

Select



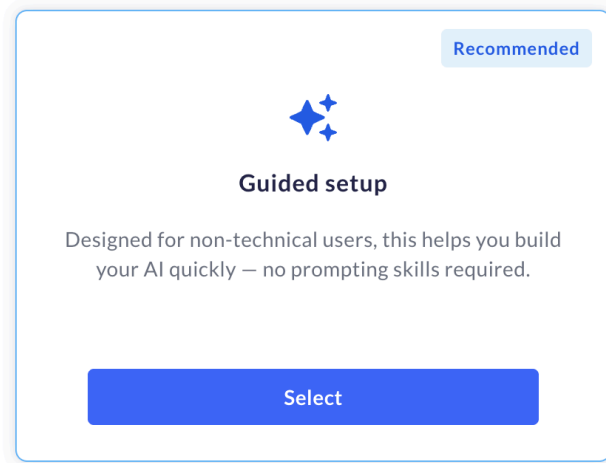
Write my own instructions

Best for advanced users who want to write precise, custom instructions.

Select

Guided Setup

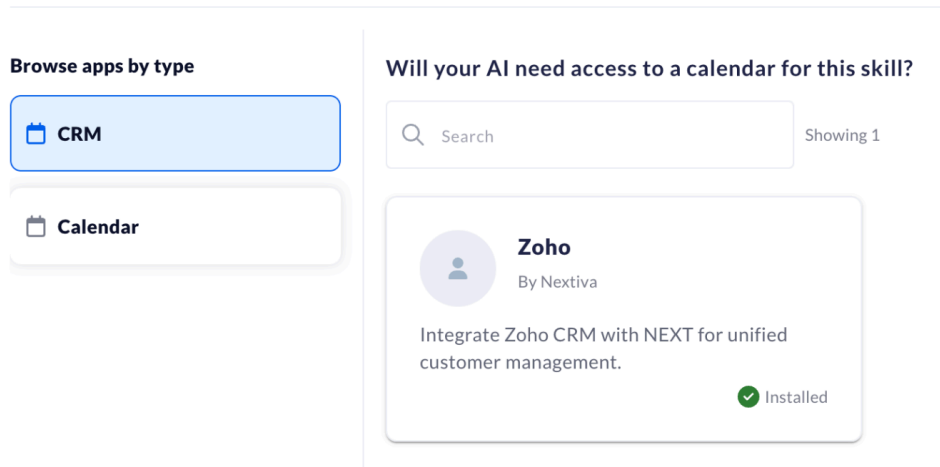
1. From Creating a Custom Skill, select **Guided setup**.



2. Review the prompt asking if your AI should take actions in other apps, such as managing calendar.

Would you like your AI to take actions in other apps?

For example, connect your calendar so your AI can create and manage events for you.



3. Browse available **app categories** on the left, such as **CRM** or **Calendar**.
4. Select a **category** to view available integrations. A blue checkmark will appear once it is selected.



5. Review the available **functions** for the selected app or skill. Expand sections like **Zoho** or **General functions** to view options as needed.



6. Select the **checkbox** next to each function you want your AI Employee to access.

Available Functions

	Name	Description
☒	calculator_tool	Evaluates a mathematical expression string and returns the computed result.
☒	calendly-update-appointment	Reschedule an existing appointment to a new time.
☐	calendly-book-appointment	Book an appointment for a given datetime slot
☐	calendly-get-free-slots	List appointments created by a contact

7. Review the **description** of each function to understand what it allows the AI to do.
8. Choose only the functions necessary for your use case to control permissions.
9. Select **Next**.

Next

10. The AI Employee will walk you through specific configuration steps for the functions selected.

Write my own instructions

1. From Creating a Custom Skill, select **Write my own instructions**.



Write my own instructions

Best for advanced users who want to write precise, custom instructions.

Select

2. Enter a **skill name** at the top to identify your custom skill by selecting the pencil and entering a name into the text.

Custom Skill 

3. In the **Describe this skill's role and purpose** field, enter a brief summary of what the skill should do.

Example descriptions:

"Assist customers with booking, rescheduling, and canceling appointments while collecting required details and confirming availability."

"Answer customer questions about our services and provide accurate, helpful information."

"Capture and qualify leads by collecting contact details and understanding customer needs."

Describe this skill's role and purpose 

Please enter description

0/200

4. Define how your AI Employee should behave, respond, and complete tasks. Clear and specific instructions help your AI deliver accurate and consistent responses.

Instructions

List out what steps I should follow. Include functions in {curly} brackets. [View preferred format and instruction writing guide here.](#)

ROLE DESCRIPTION:

You are a [ROLE] helping users with [PURPOSE]. Any behavioral guidance about tone/approach.

MAIN WORKFLOW:

Describe the primary conversation flow and what information to gather. Use {FUNCTION_NAME} to [ACTION] when [CONDITION].

BUSINESS RULES:

Important constraints, timing, authentication requirements, etc.

TOOL USAGE:

When [SCENARIO], use {FUNCTION_NAME}. Add any specific guidance about tool usage.

CONVERSATION MANAGEMENT:

How to handle different situations, keep conversations flowing, when to end.

ERROR HANDLING:

What to do when tools fail, how to handle off-topic questions, etc.

1. Use the **Instructions text box** to define how your AI should interact with customers.
2. Start with a clear **role description**, explaining what your AI does and how it should behave.
3. Outline the **main workflow**, including how conversations should flow and what information to collect.
4. Add **business rules**, such as limitations, escalation conditions, or required steps.
5. Define **tool usage**, explaining when the AI should use specific functions or integrations.
6. Be **specific and detailed**, as clearer instructions lead to better results.
7. Refer to the [Instruction Writing Guide](#) for best practices and formatting tips.

Example (simple format):

Role Description:

You are a customer support assistant helping users with billing questions in a friendly and professional tone.

Main Workflow:

Ask for the customer's account email, identify the issue, and provide a clear resolution or next step.

Business Rules:

Do not provide refunds. Escalate billing disputes to a human agent.

Tool Usage:

Use {lookup_account} to retrieve account details when an email is provided.

5. Define tools and functions by specifying which tools your AI should use and when.

What tools/functions should I use? ?



- a. Reference functions using {function_name}.
- b. Define when each function should be used.
- c. Keep instructions clear and specific.
- d. Refer to the Instruction Writing Guide for best practices.

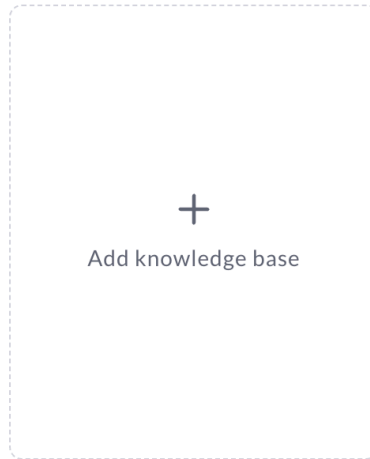
Example:

- Use **{calendly-get-free-slots}** when a customer asks for available appointment times.
- Use **{calendly-book-appointment}** after confirming the customer's preferred date and time.
- Use **{calendly-update-appointment}** when a customer requests to reschedule.
- Use **{calendly-cancel-appointment}** when a customer wants to cancel an appointment.

This shows both the **function format** and **when to use it**, which is the key thing users need to understand.

6. Create a Knowledge Base by selecting **+ Add knowledge base**.

Skill specific knowledge bases ?



XBert Tip: A knowledge base provides your AI Employee with the information it needs to answer questions accurately. This can include website content, documents, or other resources.

A. Choose an existing **collection** from the list.

Choose collections



Showing 1

Create knowledge base

Website ☐

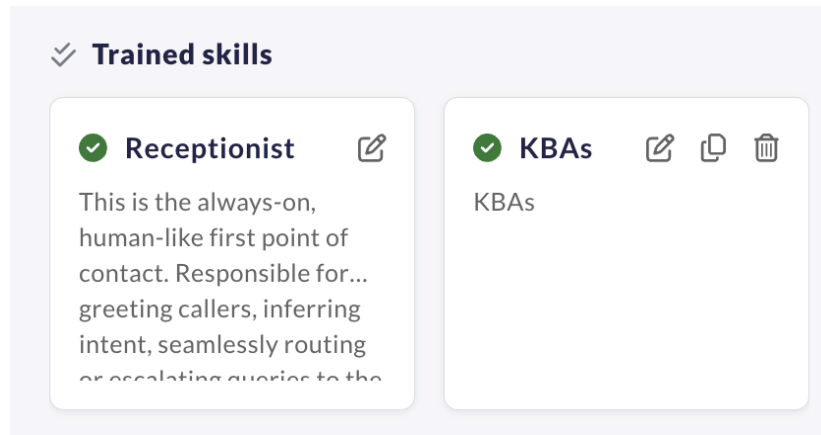
 <https://academy.nextiva.com/>

Cancel

Save & close

B. Select **Save & Close** or **Create a New Knowledge Base**.

Manage trained skills



Cloning a Skill

Once added, your skills will appear under **Trained skills**. To ensure your XBERT AI continues running without issues, we recommend cloning the skill rather than editing a live skill when able.

1. Select the **duplicate icon** to clone a skill.



2. Identify the copy with the “_copy” label.



3. Continue to edit the cloned skill.

Editing a Skill

Once added, your skills will appear under **Trained skills**. To ensure your XBERT AI continues running without issues, we recommend cloning the skill rather than editing a live skill when able.

1. Select the **edit icon** to edit a skill.



2. Make changes as needed to the skill.
3. Select **Save** to continue.

Save

Deleting a Skill

1. Locate the skill that needs to be deleted.
2. Select the **delete icon** to remove a skill.



3. Confirm that you would like to delete the skill by selecting delete.

Delete skill?

Are you sure you want to delete **KBAs_copy**? This may break any workflows that are currently using this skill.

Cancel

Delete

4. Or, select cancel if you need to double-check that no workflows will be impacted.

Receptionist Settings

This setting controls how your AI Employee routes conversations to the appropriate skill or team member. It appears when adding or editing the **Receptionist** skill and is set to **Use intelligent routing** by default.

Receptionist settings



Set the rules for how your AI should transfer conversations



Use intelligent routing

Let AI make the routing decisions for you. AI will understand what the customer needs and intelligently matches them with the right skill or person.



Custom routing (advanced)

Create your own routing rules for full control. Best for teams that need predictable outcomes, strict workflows, or compliance requirements.

Use intelligent routing (default)

Let XBert automatically decide how to route conversations.

- The AI analyzes customer intent and context.
- It matches conversations to the most appropriate **skill or person**.
- Best for most users who want a simple, automated experience.

Custom routing (advanced)

Create your own routing rules for more control. Use custom routing if you need specific workflows, predictable outcomes, or have strict business rules for how conversations should be handled.

1. Select **Custom routing (advanced)**.
2. Review or edit the **routing guidelines** in the text box.



Custom routing (advanced)

Create your own routing rules for full control. Best for teams that need predictable outcomes, strict workflows, or compliance requirements.

Define your routing rules

Intent-Based Routing Guidelines:

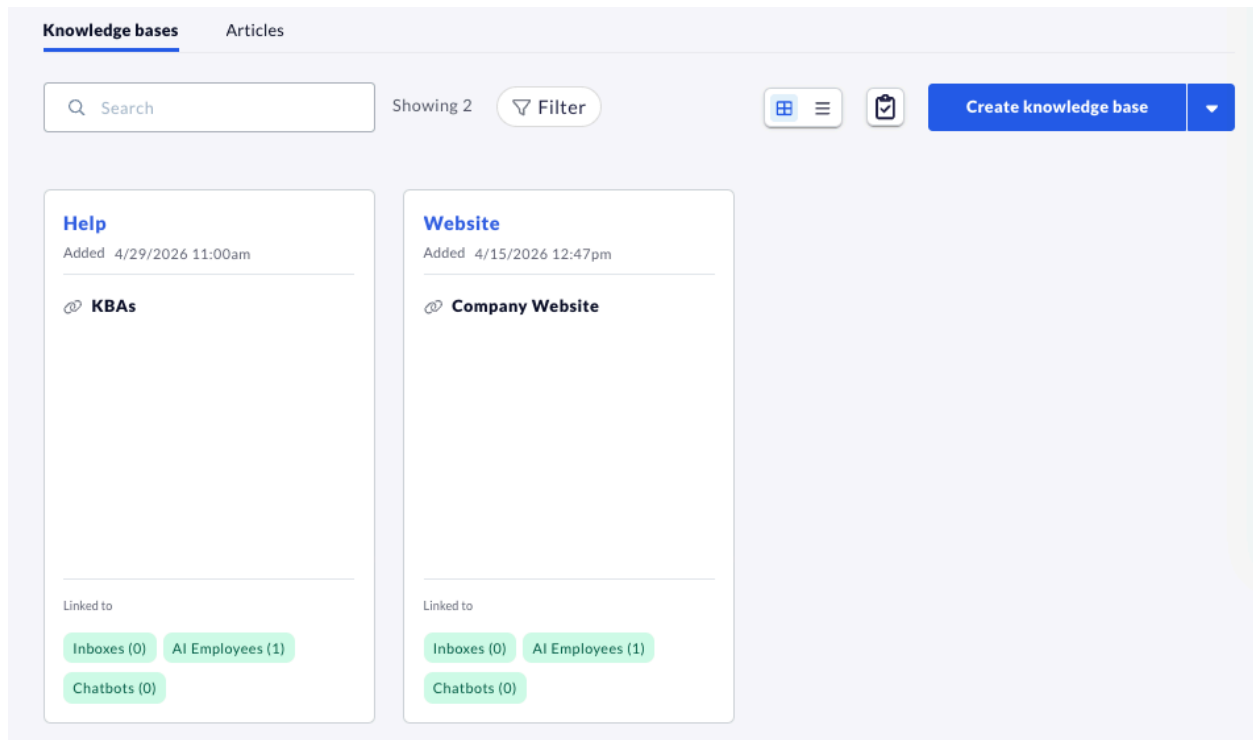
- Do NOT rely solely on keyword matches when determining which skill to route to
- Analyze the underlying user intent from the complete message and conversation context
- Consider what the user is trying to accomplish, not just the words they use
- Evaluate the user's emotional state and urgency level as indicators of intent
- Look for action-oriented language that reveals the user's actual goal
- Distinguish between informational queries and action requests

 **Rewrite my prompt**

3. Define how conversations should be routed based on **intent, context, or conditions**.
4. Select **Rewrite my prompt** to refine the routing logic with AI assistance.
XBert Tip: This step is required to ensure it is ready for AI to understand. You cannot save without it.
5. Select **Save** to apply your changes, or **Cancel** to exit.

Knowledge Base

Your Knowledge Base is the information your AI Employee uses to answer customer questions.



While **skills** define what your AI can do, the Knowledge Base provides the **content it uses to respond**, such as your services, policies, FAQs, and business details.

Adding accurate and relevant content helps your AI:

- Answer questions correctly
- Stay consistent with your business
- Reduce the need for human follow-up

You can build your Knowledge Base by:

- Connecting your website
- Uploading documents (PDF, DOCX, etc.)
- Adding articles or links

The more complete and accurate your Knowledge Base is, the better your AI Employee will perform.

Knowledge Base: Good vs. Poor Content

The quality of your Knowledge Base directly impacts how accurately your AI responds. Here's what effective content looks like, and what to avoid.

Good Example

- Clear service descriptions
- Frequently asked questions
- Pricing, hours, and contact details
- Up-to-date and accurate information

Why it works:

- Gives the AI real content to reference
- Reduces incorrect or incomplete answers

Poor Example

- Very short or incomplete descriptions
- Outdated or incorrect information
- Missing common customer questions

Why it doesn't work:

- Leaves the AI without enough context

Leads to inaccurate or generic responses

View Knowledge Bases and Articles

Access and review your existing content.

1. Select the AI Employee icon.



2. Under the **Manage** section, select **Knowledge Base**.

Manage



Knowledge base

3. View existing knowledge bases in the **Knowledge bases** tab.

Knowledge bases

4. Select the **Articles** tab to view all associated articles.

Articles

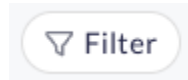
5. Use the **Search** field or **Filter** to find specific content.

Search

Filter the Knowledge Base

Use filters to organize and refine the list of knowledge bases or articles.

1. Select **Filter**.



2. Choose an **order** (e.g., Newest to oldest).

Order

3. Select a **date range**.

Date Range

4. Select **Apply** to update the view, or **Cancel** to exit.



5. Select **Clear filters** to reset all selections.

[Clear filters](#)

Create a Knowledge Base

If you don't have an existing collection, you can create one.

Create knowledge base



Knowledge base name *

Enter knowledge base name

0/32 characters

Description *

Add a description

0/200 characters

+ Add inbox



Create a new knowledge base

Drag multiple PDF files or paste individual web links from your clipboard.

Add new articles

Cancel

Save & next

1. From the steps above, select **Create knowledge base**.

Create knowledge base

2. Enter a **knowledge base name**.

Knowledge base name *

Enter knowledge base name

0/32 characters

3. Add a **description**.

Description *

Add a description

0/200 characters

Examples:

“Contains company FAQs, services, and support information for customer inquiries.”

“Knowledge base for product details, pricing, and common customer questions.”

“Support documentation and troubleshooting guides for customers.”

“Information about our services, policies, and contact details.”

“Website content used to answer customer questions and provide accurate information.”

4. Select **+ Add Inbox** to search for a queue to add to the knowledge base.

+ Add inbox

🔍 Search queues

General inbox

5. Select **Add new articles** to add content that your AI Employee will use to answer questions.



Create a new knowledge base

Drag multiple PDF files or paste individual web links from your clipboard.

Add new articles

- a. Choose **Add from a website** to paste a web link (URL) to import content from a website.



Add from a website

Pull content from an existing website to create a new knowledge base.

Select

- i. Enter the **web link URL** in the text field.

Web link

Web link URL *

Paste a web link from your computer clipboard.

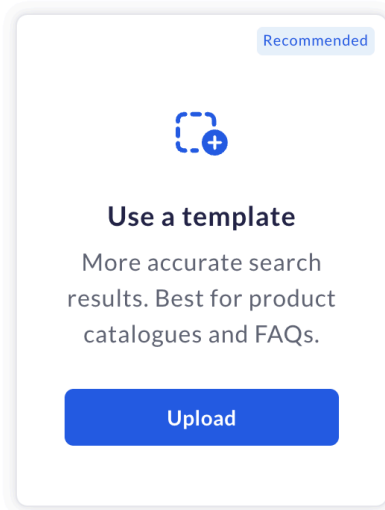
- ii. Select the **content scope** from the dropdown, such as importing only the page or the page and all related links.

Link settings

What content do you want to pull into this knowledge base?

This page and all related pages it links to (recommended) ▼

- iii. Review your selection to ensure it includes the content you want your AI to use.
 - iv. Select **Next** to import the content, or **Cancel** to exit.
 - v. Proceed to Choose Collections.
- b. Choose **Use a Template** to upload a pre-formatted template to quickly structure your knowledge base content. Structured data like templates helps your AI provide more precise and consistent answers.



- i. Select **Download template** to download the pre-formatted file.

Download template

Start with our pre-formatted template to ensure your data is structured correctly.

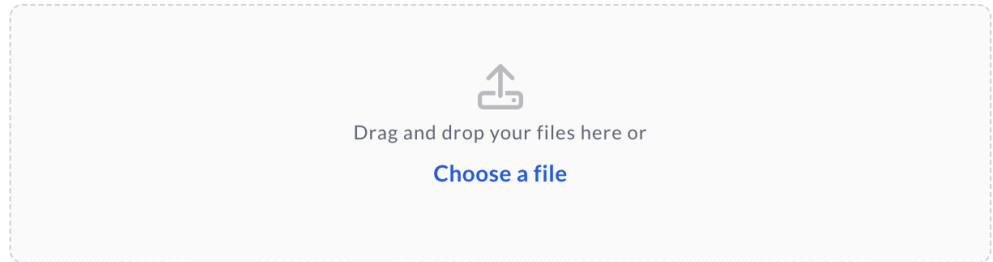


- ii. Open the file and add your **content** following the provided structure.
- iii. Return to XBert and select **Choose a file** or drag and drop your file into the upload area.

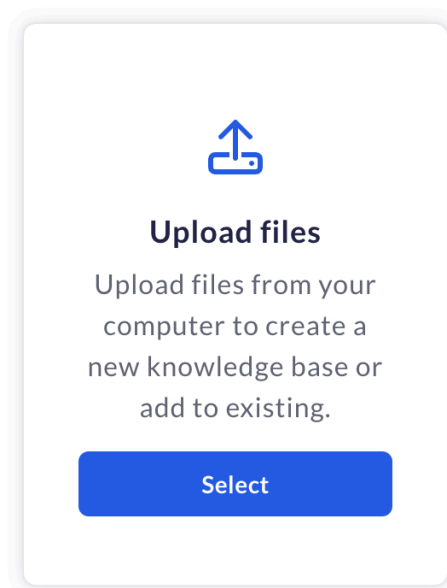
2

Upload your completed file

Fill in the template with your data, then upload it here.

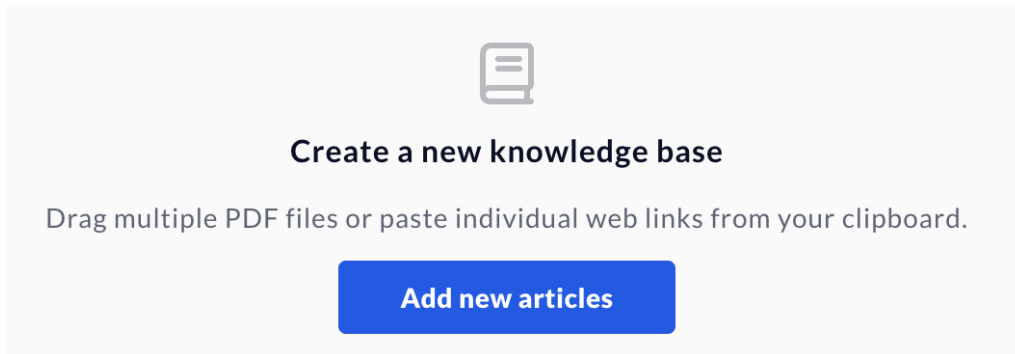


- c. Choose **Upload files** to upload one or more PDF files by dragging and dropping them into the upload area. These files are used as reference material, but structured content often produces more accurate responses.



- i. Select the file you wish to upload from your computer.
- ii. Select **Open**.

- d. Repeat to add multiple documents or links as needed.
- e. Review the added content to ensure it is accurate and relevant.
- f. Select **Save & next** to continue.



6. Select **Save & next** to continue.



7. Select **Rewrite my prompt** if you want AI assistance refining your instructions.
8. Select **Save** to apply your custom skill, or continue to the next section.

← Skill training: Custom Skill

Rewrite my promptCancelSave

Jump to...

1 Name & Description

2 Workflow & Instructions

3 Functions & Tools

4 Knowledge Base

Custom Skill

To give you a head start, we've filled in each section with suggested instructions. Make edits or add details as needed.

Describe this skill's role and purpose

Please enter description

0/200

Instructions

List out what steps I should follow. Include functions in [curly] brackets. [View preferred format and instruction writing guide here.](#)

ROLE DESCRIPTION:

You are a [ROLE] helping users with [PURPOSE]. Any behavioral guidance about tone/approach.

MAIN WORKFLOW:

Describe the primary conversation flow and what information to gather. Use [FUNCTION_NAME] to [ACTION] when [CONDITION].

BUSINESS RULES:

Important constraints, timing, authentication requirements, etc.

TOOL USAGE:

When [SCENARIO], use [FUNCTION_NAME]. Add any specific guidance about tool usage.

Choose Collections

Choose collections

×

Search

Showing 2

Create knowledge base

Help

✓

<https://help.nextiva.com/>

Website

<https://academy.nextiva.com/>

Cancel

Save & close

1. Once the content has been added, it will be available as a collection.
2. Select the newly created item (it should already be selected, as noted by the checkmark).
3. Select **Save & Close**.

Save & close

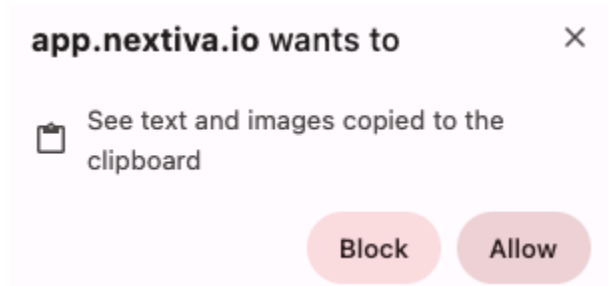
4. Select a skill and train your AI employee's skill by [choosing your training method](#).

Add an Article

1. Select **Add Article** icon.



2. **Allow** access.



3. Enter the **web link URL**.

Web link

Web link URL *

Paste a web link from your computer clipboard.

4. Select how much content to include:

Link settings

What content do you want to pull into this knowledge base?

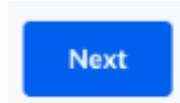
This page and all related pages it links to (recommended) ▼

This page and all related pages it links to (recommended)

This webpage alone

All pages within this sub-domain

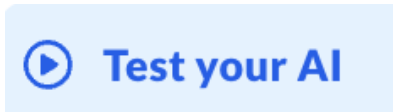
- a. This page only
 - or
 - b. This page and all related pages it links to (recommended)
5. Select **Next** to continue.



Test Your AI Employee

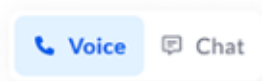
The next step allows you to preview how XBert will interact with customers over live call or chat.

From the selected AI Employee's editing page, select **Test your AI**.



Testing Voice

1. By default, the testing is set to Voice.



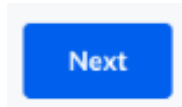
2. **Call into the AI Employee** at the number you set for it.
3. Ask the AI Employee relevant questions, as well as outlier questions so that you can see how it guides a customer when it does not know the answer. This also helps you identify gaps in your training before customers interact with your AI.
4. If you're not sure what to ask, provided below are some **example testing questions**.

Ask an example question

"What are your hours of operation?"

"Where are you located?"

3. Refer to the [XBert AI Optimization Guide](#) for additional questions.
4. When you are finished testing the AI Employee, proceed to testing Chat or select **Next** in the bottom right-hand corner when finished.

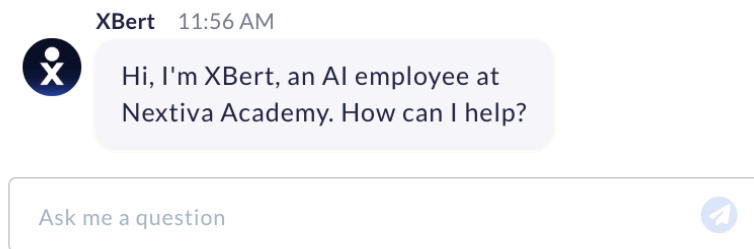


Testing Chat

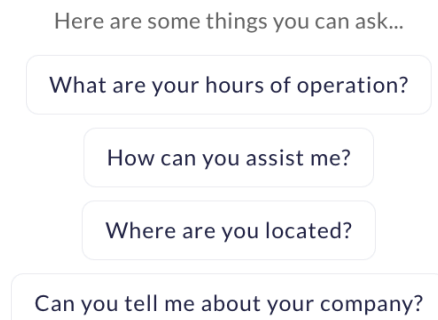
1. If you enabled the Chat option for your AI Employee, toggle over to the **Chat icon**.



2. At the bottom of the window, type a question in the **chat field**.
3. The chat will respond to you and also share what resource it pulled the information from. Use this to verify that your AI is using the correct information sources.



3. If you are unsure what to ask, there are also **example test questions** you may type into the Chat field, or select the question for it to be automatically answered.



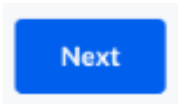
4. Before you go, we recommend you work through the AI testing checklist.

Your AI testing checklist

Use these tests to confirm your AI responds as expected before going live.

- Ask a common customer question
- Ask questions that trigger each skill
- Try a request the AI shouldn't handle
- Ask for a real person

5. When you are finished testing the AI Employee, select **Next** in the bottom right-hand corner.



Next

Xbert Tip: Calling is left on by default, but you can toggle on and off the Live Chat and SMS XBERT AI options in Channel Configuration. If you do not wish to use voice, we advise to not distribute the phone number.

Channel Configuration

From the selected AI Employee's editing page, select **Turn on your channels**.

 **Turn on your channels**

Here, select the channels where XBERT will interact with your customers. Choose channels based on how your customers typically contact your business.

Scroll down and use the toggles to enable Calling, SMS, and/or Live Chat.

Connect calls, texts, and chat

Select the ways you want customers to reach your AI. We'll help you finish the setup for each one in the next step.

Business hours ⓘ

Edit hours

Mon-Fri 9:00am-5:00pm, Sat-Sun Closed

Which channels should AI handle?

 Calling

Answering settings

When do you want your AI Employee to be available?

Always on 24/7

What should AI say when it answers a call?

Hi, I'm [AI Employee Name], the AI assistant at [Business Name]. How can I help?

Handoff settings

What would you like to do if your AI Employee can't solve customer requests?

☒ Forward the call to specific number

+1(480) 123-3456

☐ Send you a notification (select at least one)

AI Coverage & Scheduling

Choose when your AI Employee should be active and able to respond to customers. This determines when customers will interact with your AI instead of a human.

Outside of these hours, customer interactions can be handled by your team using NEXT or follow your configured fallback settings.

For advanced scheduling options, see the [Schedules](#) section in Admin Settings.

AI coverage & scheduling ⓘ

When are you open for business? *

[Preview schedule](#)

Default ▼

1. Select **Preview schedule** to open your AI Employee's availability settings.

[Preview schedule](#)

2. [Configure Schedule Hours](#)

Voice

Configure how your AI Employee handles incoming calls. Select which phone numbers it will answer, set availability, and define how calls are managed, including summaries and fallback options.



Calling



Select the phone numbers your AI will answer *

Select



When do you want your AI Employee to be available?

Always (24/7)



Send a call summary for each call your AI answers.



What should happen if your AI can't resolve a request?

☒ Forward the call to another number (specify number)

4802902256

☐ Send you a notification

Advanced settings

Would you like a custom greeting for calls?



Do you need to handle escalations differently after hours?



Configure Calling

1. Toggle **Calling** on to allow your AI Employee to answer phone calls. Calling interactions are voice-based and typically require faster, more conversational responses.



2. Select the **phone number(s)** your AI will answer from the dropdown.

Select the phone numbers your AI will answer *

A screenshot of a dropdown menu. The menu is rectangular with a light blue border. Inside, the word 'Select' is displayed in a dark grey font. On the right side of the menu, there is a small downward-pointing arrow icon.

3. Choose when your AI should be available (e.g., **Always (24/7)** or a set schedule).

When do you want your AI Employee to be available?

A screenshot of a dropdown menu. The menu is rectangular with a light blue border. The selected option, 'Always (24/7)', is displayed in a dark grey font. Below the menu, a list of options is shown: 'Always (24/7)' and 'After hours only'. The 'Always (24/7)' option is highlighted with a light blue background.

4. (Optional) Enable **call summaries** to receive a summary after each call.

A screenshot of a configuration interface. At the top, the text 'Send a call summary for each call your AI answers.' is followed by a blue toggle switch that is turned 'on'. Below this, there are two checkboxes: 'Send an email summary' and 'Send a text summary', both of which are currently unchecked. At the bottom, there is a red error message box with a white 'x' icon and the text 'You must select at least one summary option when this feature is enabled.' followed by a white 'x' icon.

- a. When enabling email summary, enter the email address that should receive the email summary.
- b. When enabling text summary, enter the phone number that should receive the text summary.

5. Choose a fallback option if the AI cannot resolve a request:

What should happen if your AI can't resolve a request?

- ☐ Forward the call to another number (specify number)
- ☒ Send you a notification

Please select at least one*

- ☐ Send an email summary
- ☐ Send a text summary
- ☐ Mark it for callback in my account

a. **Forward the call** to another number (enter the number)

or

b. **Send a notification** to at least one resource.

XBert Tip: This ensures customers can still get help if the AI is unable to assist. When this happens, the customer will either be transferred or a notification will be sent so a human can follow up.

Advanced Settings (Optional)

1. Enable a **custom greeting** for calls, if needed.

Advanced settings

Would you like a custom greeting for calls? 



Set your custom call greeting

Hi, I'm XBert, an AI employee at Nextiva Academy. How can I help?



It's best practice to include a disclosure informing customers they are interacting with AI.



2. Set different handling for **after-hours escalations**, if applicable.

Do you need to handle escalations differently after hours? 



After business hours

☐ Forward the call to another number (specify number)

☒ Send you a notification

Please select at least one*

☐ Send an email summary

☐ Send a text summary

☐ Mark it for callback in my account

- a. **Forward the call** to another number (enter the number),
or
 - b. **Send a notification** to at least one resource.
3. If not enabling other channels, select **Save** when finished.

Save

SMS

Configure how your AI Employee manages text message conversations, including number selection, summaries, and fallback options.



Select the phone numbers your AI will answer *

Send a conversation summary for each text conversation your AI answers. ☐

What should happen if your AI can't resolve a request?

Please select at least one*

☐ Send an email summary

☐ Send a text summary

Advanced settings

Would you like a custom greeting for text messages? ☐ [?](#)

Before You Begin

You must complete text messaging registration, or [10DLC](#), before your AI Employee can send texts.

Configure SMS

Set how your AI Employee handles text message conversations.

1. Toggle **SMS (text messaging)** on to enable messaging. SMS conversations are shorter and more direct, often used for quick questions or updates.



2. Select the **phone number(s)** your AI will use to send and receive texts.

Select the phone numbers your AI will answer *

Select

▼

3. (Optional) Enable **conversation summaries** to receive a summary after each text interaction. This is useful for monitoring customer activity and follow-ups.

Send a conversation summary for each text conversation your AI answers. 

☐ Send an email summary

☐ Send a text summary

 You must select at least one summary option when this feature is enabled. 

- a. **Send an email summary** by entering the email address into the textbox
- or
- b. **Send an email summary** by entering the phone number into the textbox

4. Choose at least one fallback option if the AI cannot resolve a request:

What should happen if your AI can't resolve a request?

Please select at least one*

☐ Send an email summary

☐ Send a text summary

a. **Send an email summary**

or

b. **Send a text summary**

Advanced SMS Settings (Optional)

1. Enable a **custom greeting** for text messages, if needed.

Advanced settings

Would you like a custom greeting for text messages? 



2. Type in the **greeting verbiage** for how you want your AI Employee to greet customers in an SMS.

Set your custom text greeting

Hi, I'm XBert, an AI employee at Nextiva Academy. How can I help?



It's best practice to include a disclosure informing customers they are interacting with AI.



3. Select an option for how you want the AI Employee to proceed if it **cannot find a resolution**. This determines whether the conversation is escalated to a person or handled through notifications.

Handoff settings

What would you like to do if your AI Employee can't solve customer requests?



Send an email summary



Send a text summary

+1 (480) 123-4567



Mark it for callback in my account

4. If not enabling other channels, select **Save** when finished.

Save

Live chat

Configure how your AI Employee manages live chat on your website, including channel selection, summaries, and fallback options.

Set how your AI Employee handles conversations through your website chat. Setting up the handoff settings for **Live Chat** is similar to setting up the SMS channel.

 Live chat 

 **Reminder:** Confirm your live chat widget is installed so customers can see and use chat on your website. [View installation steps](#) 

Assign chat channels for your AI to handle *

Nextiva Academy Livechat 

Send a conversation summary for each live chat your AI answers. 

What should happen if your AI can't resolve a request?
Please select at least one*
☐ Send an email summary
☐ Send a text summary

Advanced settings
Would you like a custom greeting for live chats?  

Save & exit

Back

Save

Configuring Chat

1. Toggle **Live chat** on to enable chat interactions. Live chat is typically used by website visitors and may involve longer, more detailed conversations.

 Live chat 

2. Select the **chat channel** your AI will handle from the dropdown.
3. Enable **conversation summaries** to receive a summary after each chat (Optional). These summaries help you stay informed without reviewing every conversation manually.

Send a conversation summary for each live chat your AI answers.



☒ Send an email summary

kelsi. @nextiva.com

☐ Send a text summary

a. **Send an email summary**

or

b. **Send a text summary**

4. Choose at least one fallback option if the AI cannot resolve a request:

What should happen if your AI can't resolve a request?

Please select at least one*

☒ Send an email summary

kelsi -@nextiva.com

☐ Send a text summary

a. **Send an email summary**

Or

b. **Send a text summary**

Accessing Live Chat After Initial Setup

1. From the left menu, select the **AI Employee** icon.



2. From the Channels menu, select Live Chat.

Channels



Calling



SMS text

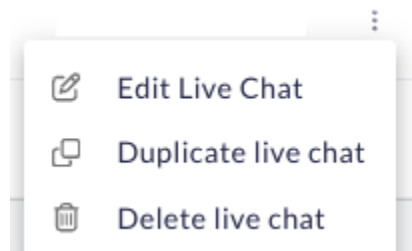


Live chat



Calendar integration

3. Select the **more options** (⋮) menu next to a widget to:



- a. **Edit Live Chat**
 - b. **Duplicate live chat**
 - c. **Delete live chat**
4. Or, select **Add Live Chat**.

Add live chat

Advanced Chat Settings (Optional)

1. Enable a **custom greeting** for live chat, if needed.

Advanced settings

Would you like a custom greeting for live chats? 



Set your custom live chat greeting

Hi, I'm XBert, an AI employee at Nextiva Academy. How can I help?



It's best practice to include a disclosure informing customers they are interacting with AI.



2. If not enabling other channels, select **Save** when finished.

Save

Chat Installation

Before you are finished with your chat setup, you need to install it onto your website.

1. Save your work
2. Reaccess the chat by selecting the pencil next to your AI Employee's chat.

AI Employees	Assigned Inbox ↓	Assigned channels ↓	Skills ↓	Updated by ↓	Updated at ↓	Status ↓
 XBert	General inbox	 	1 skills	Kelsi Wieler	04/29/2026 02:22 PM	Active

3. Scroll down through channels and select **View installation steps**.

 **Reminder:** Confirm your live chat widget is installed so customers can see and use chat on your website. [View installation steps](#) 

4. This screen will populate.

Live chat				
Search	Showing 1			Add live chat
☐	Name	Status	Created date	Script
☐	Nextiva Academy Livechat	Published	04/15/2026	 Copy code
1-1 of 1 < >				

5. Select Copy Code to access the code you will put onto your website.

 [Copy code](#)

Add Live Chat Widget

Create a chat widget that your AI Employee will use on your website.

← [Add live chat](#)

Add live chat

Name * 

Enter a Name

Brand Name * 

Brand Name

Select logo 

Select Logo

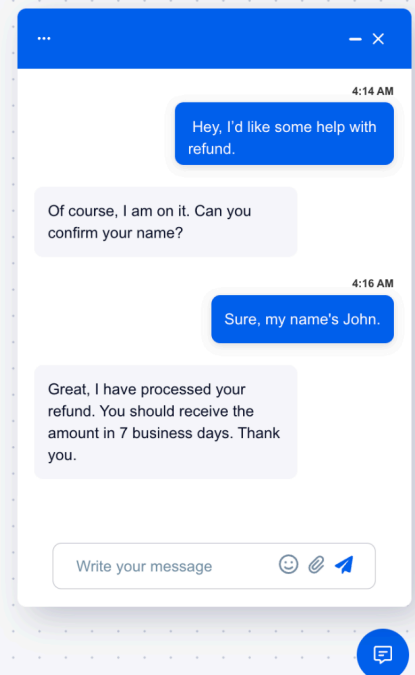
Select theme * 

 #005FEC



Select font * 

Arial (sans-serif)



1. Go to **Live chat** and select **Add live chat**.
2. Enter a **Name** for the chat widget.

Name * 

AcademyXBert

3. Enter your **Brand Name** (this appears to customers).

Brand Name * ?

Nextiva Academy

4. Upload or select a **logo** (optional).

Select logo ?

Select Logo



5. Choose a **theme color** for the chat widget.

Select theme * ?



#005FEC



6. Select a **font style** from the drop-down menu.

Select font * ?

Arial (sans-serif)

Arial (sans-serif)

Verdana (sans-serif)

Tahoma (sans-serif)

Trebuchet (sans-serif)

Times New Roman (serif)

Georgia (serif)

Garamond (serif)

Courier (monospace)

7. Select **save**.

Save

8. Return **Back to the live chat** or **Continue to advanced settings**.



Live chat created

Continue to advanced settings for the full list of live chat configurations.

[Back to live chat](#)

[Continue to advanced settings](#)

Advanced Live Chat Settings

General

General

Appearance

Welcome prompt

Pre-chat form

Offline hours

Preferred channels

Installation

More options

Privacy policy

General

Name

test

Brand name

test

Give a unique name to your live chat.

Select logo

Select Logo

test

4:14 AM

Hey, I'd like some help with refund.

Of course, I am on it. Can you confirm your name?

4:16 AM

Sure, my name's John.

Great, I have processed your refund. You should receive the amount in 7 business days. Thank you.

Write your message

Cancel Save

1. Enter a **name** for your live chat (for internal use).

Name

test

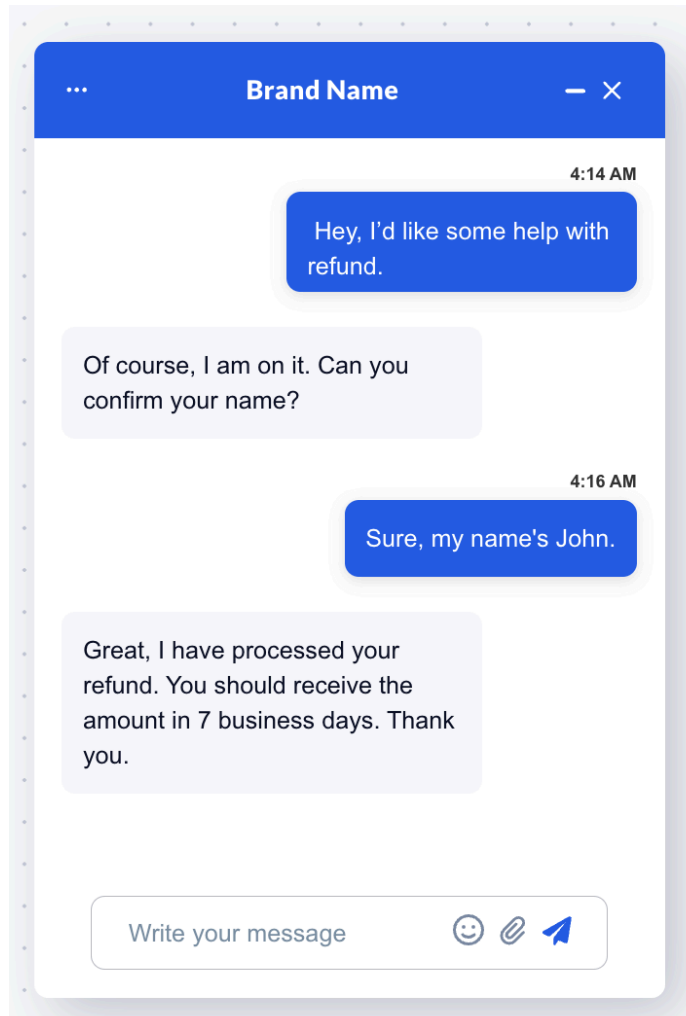
Give a unique name to your live chat.

2. Enter your **brand name**.

Brand name

Brand Name

XBert Tip: This is the name that will appear at the top of your chat widget.



3. Upload or select a **logo** (optional).

a. A select the **letter icon**.

Select logo

Select Logo



b. Select the image from your computer.

c. Select **Open**.



081VQ0000001xqr.png

PNG image - 2 MB

Information

[Show More](#)

Created

Today, 10:15 AM

Cancel

Open

4. Select **Save** to apply your changes.

Save

Appearance

Theme

☒ #005FEC

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Font

Arial (sans-serif) ▼

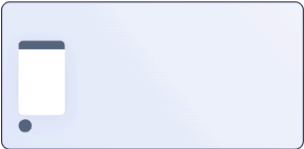
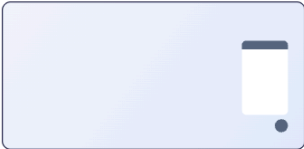
Button size

Medium (48px) ▼

Chat placement

Choose where the chat widget should appear on your website.

☐ Left ☒ Right

1. Select a **theme color** for your chat widget.

Theme

☒ #005FEC

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

2. Select a **font style** from the dropdown.

Font

Arial (sans-serif) ▼

3. Select a **button size**.

Button size

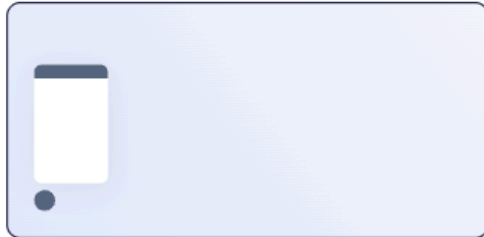
Medium (48px) ▼

4. Choose the **chat placement** on your website (left or right).

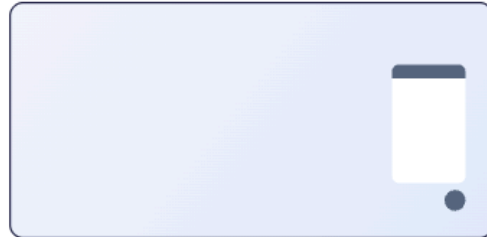
Chat placement

Choose where the chat widget should appear on your website.

☐ Left



☒ Right



5. Select **Save** to apply your changes.

Save

Welcome Prompt

← Edit Live Chat

 General

 Appearance

 **Welcome prompt**

 Pre-chat form

 Offline hours

 Preferred channels

 Installation

 More options

 Privacy policy

Welcome prompt

Introduction message

Hi, I'm Academy **XBERT**! I can find learning that fits your goals or get quick answers from Academy content. How can I help?

122 / 128

1. Enter an **introduction message** that customers will see when the chat widget appears.

Welcome prompt

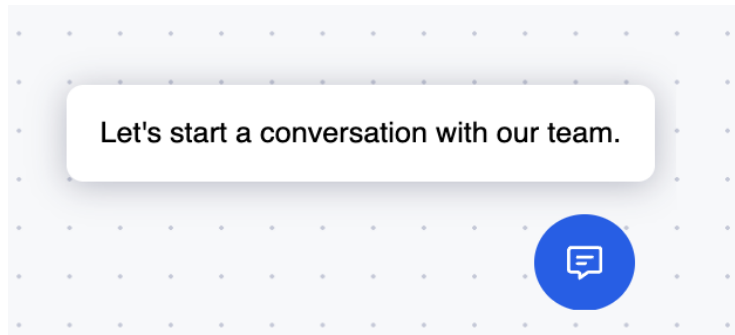
Introduction message

Let's start a conversation with our team.

41 / 128

2. Review the **character limit** to ensure your message fits within the allowed length.

3. Confirm the preview to see how the message will display on your website.



4. Select **Save** to apply your changes.



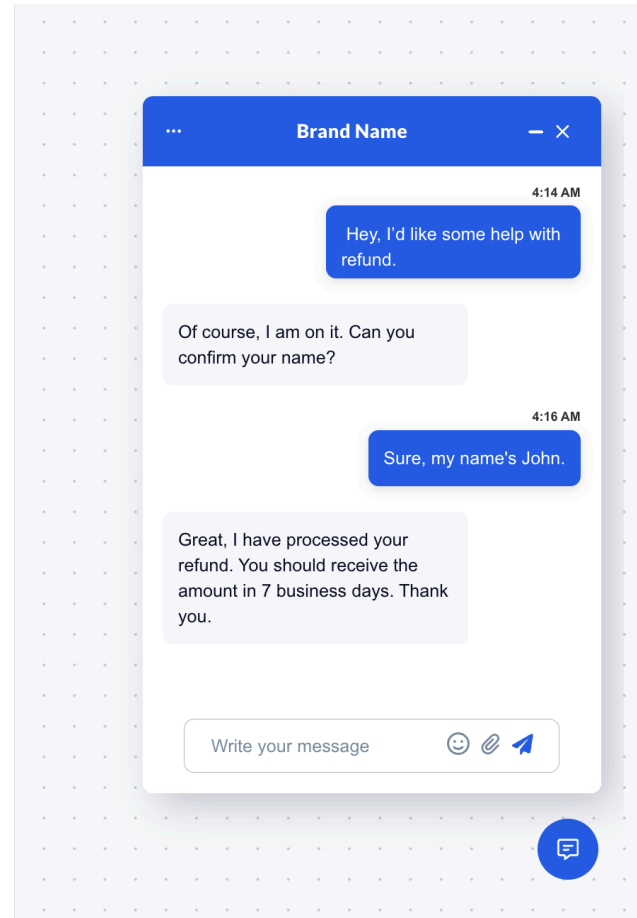
Pre-chat Form (optional)

1. Toggle **Show pre-chat questionnaire** on to enable the form.

Pre-chat form

Show pre-chat questionnaire

This feature enables a pre-chat form that captures essential user details before initiating a conversation. This helps agents prepare for interactions and streamlines support efforts.



2. Select a **pre-chat form** from the dropdown.
3. Select **User surveys** to create or manage pre-chat forms (Optional).
4. Select **Save** to apply your changes.

Save

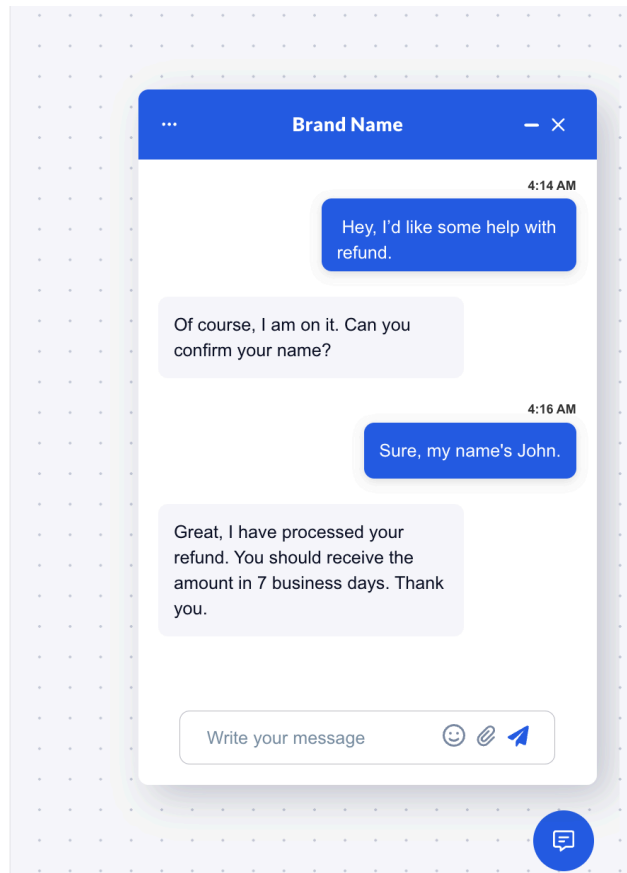
Offline Hours

1. Toggle **Enable Business hours** on to configure offline behavior.

Offline hours

Enable Business hours

Allow businesses to set up an offline messaging system when the live chat is unavailable.



2. Select your **business hours** from the dropdown.

Business hours

Select business hours ▼

3. Enter an **offline message** that customers will see when chat is unavailable.

Add a message

Enter message

0 / 500

4. (Optional) Toggle **Capture user information during offline hours** on.

Capture user information during offline hours?



When you are offline, select a form to capture the user details

5. If enabled, select a form to **collect user details** while offline.
 - a. Select **User surveys** to create or manage forms (Optional).

Form

Manage your offline forms by going to [User surveys](#).

- b. Enter a **form completion message** that users will see after submitting their information.

Form Completion Message

0 / 200

- c. (Optional) Toggle **Send email with user details collected during offline hours** on to receive submissions via email.

Send email with user details collected during offline hours?



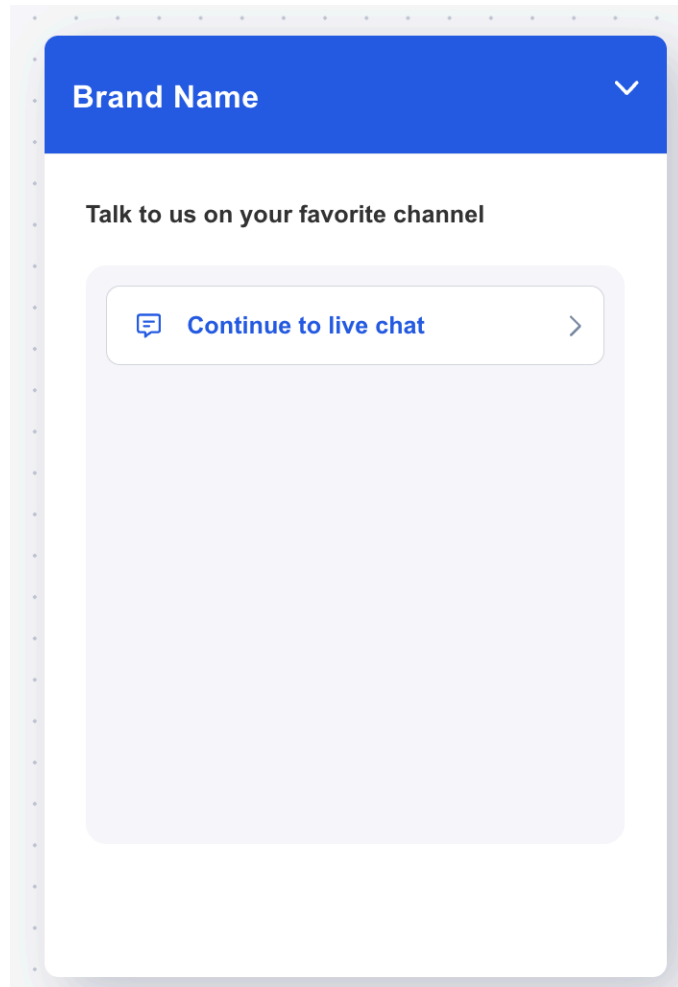
Email the captured user details up to a person or groups of people

6. Select **Save** to apply your changes.

Save

Preferred Channels

Allow customers to choose how they want to continue the conversation by offering additional communication channels within the chat experience.



1. Toggle **Enable preferred channels** on.

Preferred channels

Enable preferred channels



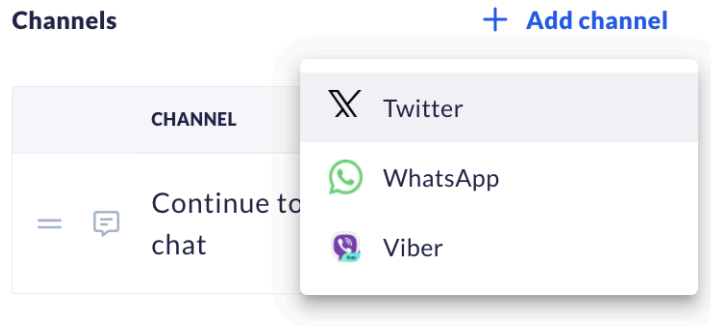
Customize the contact channel options in your live chat form, allowing your customers to choose their preferred communication channel.

2. Enter a **display message** that will appear above the channel options.

Display message

Talk to us on your favorite channel

3. Select **Add channel** to create a new option.



4. Choose a **channel type** and define its behavior (e.g., continue chat, redirect, etc.).

CHANNEL		CHANNEL VALUE
=	 Twitter	Twitter 

5. Repeat as needed to add multiple channels.

Display message

Talk to us on your favorite channel

Channels

+ Add channel

	CHANNEL	CHANNEL VALUE	
=	 Continue to live chat	Starts a chat with customer	

6. Review the preview to confirm how options will appear to customers.

7. Select **Save** to apply your changes.

Save

Installation

After creating your widget, install it so customers can access chat.

Installation

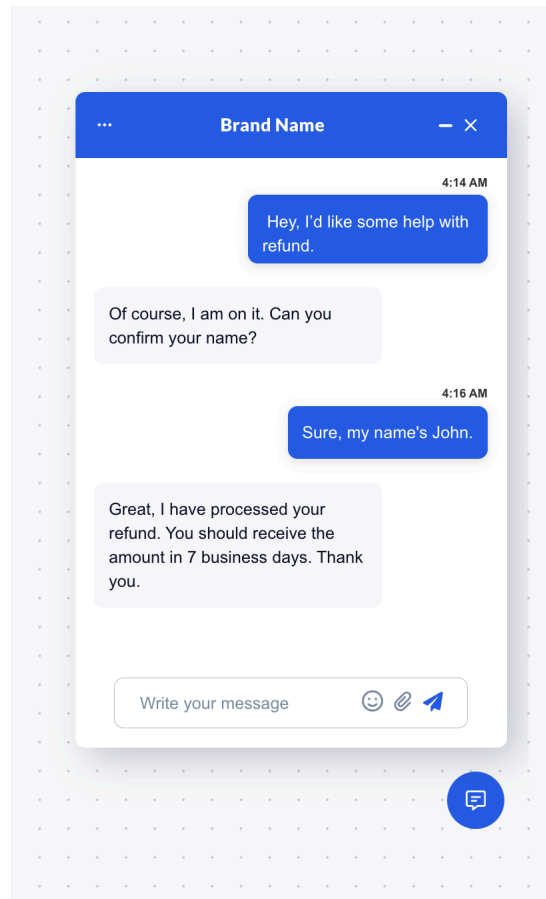
Live chat code

```
<!-- Start of NextivaCX Widget script -->
<script
  id="nextivacx-code-snippet"

  src="https://d3po7etsbwSeiv.cloudfront.net/Simplify360Chat.js?
  key=NjlmMjc4N2Q5NzIxYTQ4MDNhMTczY2I0FDQzMDQ4MTE=">
</script>
<!-- End of NextivaCX Widget script -->
```

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

Copy code



1. Locate your live chat in the list.
2. Select **Copy code** next to the widget.

Copy code

3. Paste the code into your website's HTML, just before the closing `</body>` tag. You may need a web developer to complete this step if you do not manage your website directly.
4. Save and publish your website changes.
5. Once installed, your chat widget will appear on your website for customers to use.

More Options

This feature is designed for administrators who manage chat widget settings for end-users. It offers a range of toggles and options, organized into different sections to enhance usability and customization.

End-user Activity

Control how long a chat remains active without user interaction.

1. Toggle **End-user inactivity** on to enable automatic timeouts.

End-user inactivity



Implement an inactivity timeout for chat sessions, which will automatically terminate after a predetermined duration

2. Select a **timeout duration** from the dropdown.

Timeout Chat After

5 minutes ▼

3. Enter a **timeout termination message** shown when the chat ends due to inactivity.

Timeout termination message

This conversation has been terminated due to customer inactivity.

65 / 128

User Session History

Allow users to view past conversations.

User session history



Allow your users to have multiple session histories. So that, users can go back and read the conversation history.

Toggle **User session history** on to enable conversation history.

Enable Notification Sounds

Control whether a sound plays when new messages are received.

1. Toggle **Enable notification sounds** on to play a sound for new messages.

Enable notification sounds



For every new message we will play a sound so users know there's a new message.

2. Select a **notification sound** from the dropdown.

Notification Sound

3. Select **Play sound** to preview the selected option.

 Play sound

Show browser notification

Control whether users receive browser notifications for new messages.

Show browser notification



For all new messages we will show a browser notification to the end-user.

Toggle **Show browser notification** on to enable browser alerts for incoming messages.

Show agent information

Display agent details during conversations.

Show agent information



This feature allows the display of the agent's details, such as name and nickname and profile picture, to end-users during chats. It enhances the conversation by adding a personal touch.

Toggle **Show agent information** on to display the agent's name and profile details in chat.

Show Chat Transcript

Allow users to receive a record of their conversation.

Show chat transcript



This feature enables users to receive a transcript of their chat sessions, offering a documented record of the conversation for future reference.

Toggle **Show chat transcript** on to enable chat transcripts.

Show home button

Add a shortcut for users to return to the start of the chat.

Show home button



Enables a home icon in the chat widget for users to return to the first node.

Toggle **Show home button** on to display the home icon in the chat widget.

Allow user to end chat

Let users manually close the conversation.

Allow user to end chat



Allow users to manually terminate a chat session, empowering them to conclude conversations at their discretion.

Toggle **Allow user to end chat** on to allow users to end the chat session themselves.

Attachment options

Allow users to share files during chat sessions.

Attachment options



Enable users to upload and share file attachments during chat sessions with agent, enhancing communication through multimedia file sharing.

Toggle **Attachment options** on to enable file uploads in chat.

Send read receipt

Show when messages have been read.

Send read receipt



This feature will provide a visual indicator to the customer when an agent has read their message.

Toggle **Send read receipt** on to display a read indicator to users.

Auto-open chat widget

Control whether the chat widget opens automatically.

Auto-open chat widget



Automatically display the chat widget upon page load, enhancing the visibility and engagement of the chat feature.

Toggle **Auto-open chat widget** on to display the chat when the page loads.

XBert Tip: Enabling this option may cause the chat widget to open each time the page reloads.

Show footer

Display additional information or branding in the chat widget.

Show footer



This feature displays a footer within the chat widget, offering branding opportunities and presenting additional information to users.

Toggle **Show footer** on to include a footer in the chat interface.

Configure Privacy Policy

Display your privacy policy to users before they begin a chat, allowing them to review and acknowledge your terms.

Privacy policy

Show privacy policy



Allow end-users to view and acknowledge your organization's Privacy Policy before starting a chat session.

By engaging with this chat, you agree to share your message, app logs, and diagnostics to help us improve. Don't include personal or sensitive info.

Sans Serif



B

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148 / 270

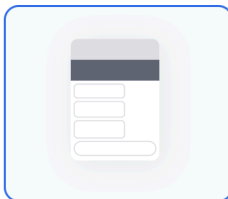
URL for 'See our privacy policy':



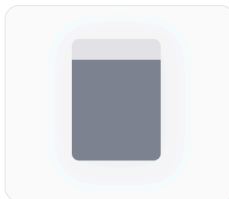
Choose how the Privacy Policy is shown to users

☒ Compact

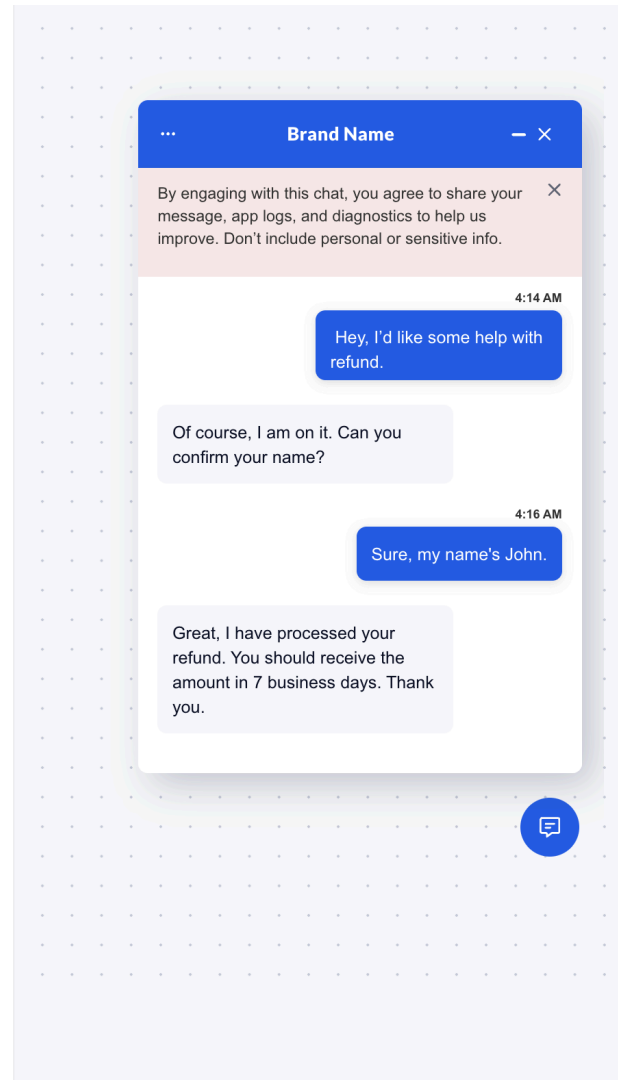
☐ Full



Embed alongside other live chat elements



Display as a standalone section before the chat starts



1. Toggle **Show privacy policy** on to display the policy in the chat widget.

Show privacy policy



Allow end-users to view and acknowledge your organization's Privacy Policy before starting a chat session.

2. Enter your **privacy policy message** in the text field.

3. Enter the **URL** for your full privacy policy.

URL for 'See our privacy policy'.

4. Select how the policy is displayed:

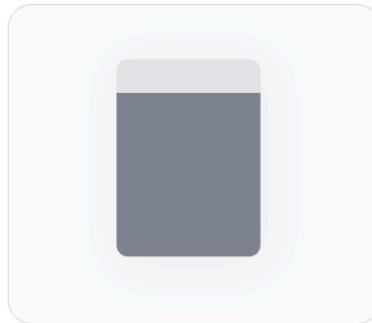
Choose how the Privacy Policy is shown to users

☒ **Compact**

☐ **Full**



Embed alongside other live chat elements

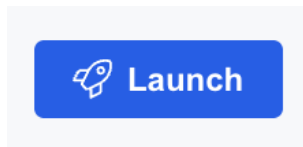


Display as a standalone section before the chat starts

- a. **Compact** (shown within the chat interface)
 - Or
 - b. **Full** (shown as a separate screen before chat starts).
5. Review the preview to confirm how the policy will appear to users.

Launching your AI Employee

When finished adding all desired channels, select **Launch** in the bottom-right corner. At this point, your AI should be able to handle basic customer questions based on the information you provided.



Once launched, your AI will begin interacting with customers through the channels you enabled.

An announcement that a new XBert employee has joined your team will populate:



XBert has joined your team 🎉

Here's what to expect next:

-  Your AI will start talking to customers when they reach out
-  All AI conversations will appear in your Inbox
-  Requests that need follow-up will have a Forwarded status

[Go to inbox](#)

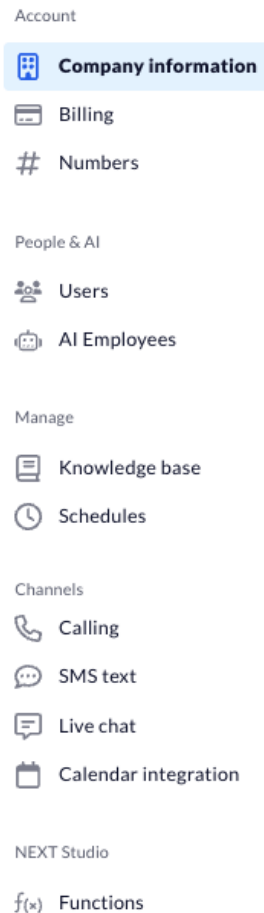
[Go to AI Employee page](#)

Advanced Administrative Onboarding

Advanced Onboarding allows you to configure additional features after completing basic setup. This includes settings such as phone numbers, SMS compliance, live chat, and other account-level configurations.

Administration Settings

The **Administration Settings** area allows administrators to manage and update key account configurations, including:



Access Administration Settings

From the Home page, select the **Administration icon** in the bottom-left corner.



Company Information

Manage your organization's account settings and business details to ensure accurate configuration across your system.

Account Details

Account details

Company name *

!TEST! - Nextiva Academy

Account number *

Timezone *

Arizona Time (MST - no DST) - UTC-07:00

Extension start range * ?

1000

Extension end range * ?

9999

Confirm basic account settings:

- **Company name** – Your organization's name
- **Account number** – Unique identifier for your account
- **Timezone** – Default timezone for your account
- **Extension start range / end range** – Defines the range of extensions available

Company Details

Industry

Professional Services

Company website

https://academy.nextiva.com/

Update additional business information:

- **Industry** – Select your business category
- **Company website** – Enter your website URL

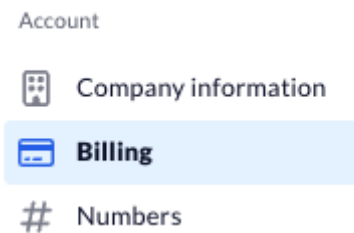
Select **Save** in the bottom-right corner when finished.

Save

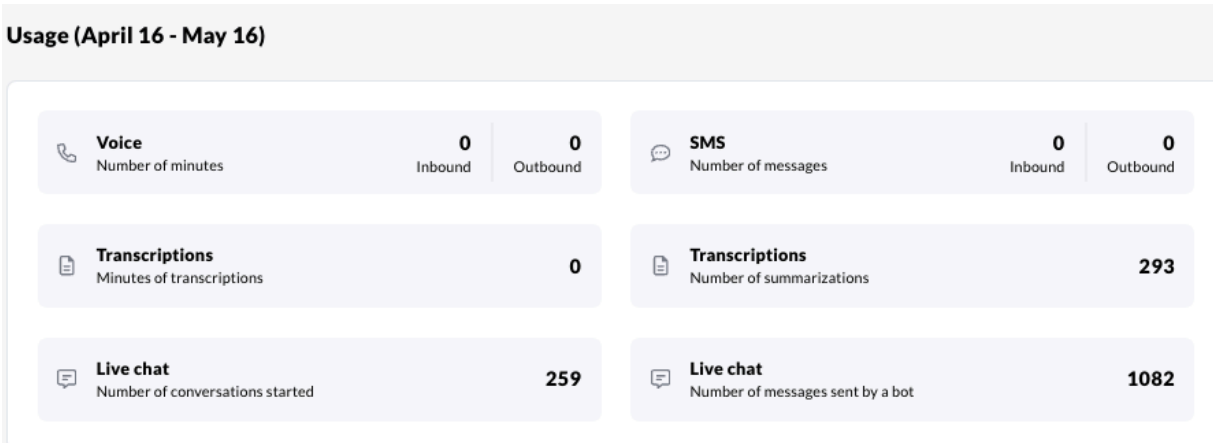
Billing

The **Billing** page allows administrators to review usage, access invoices for their account, and manage billing details for your account.

- 1. Under the Account section, select **Billing**.



- 2. Review total **channel usage** for the selected billing period.



- 3. Open and search for Invoices of previous billing periods.

Invoices

Invoice number	Type	Invoice date	Status	Amount
----------------	------	--------------	--------	--------

- 4. Review **billing contact information** at the bottom of the page.
- 5. For general billing questions, refer to the **Nextiva Billing contact information** at the top.

Numbers

Manage your phone numbers, including assigning, adding, downloading, and transferring numbers.

View and Manage Numbers

1. Under the **Account** section, select **Numbers**.

Numbers

[Numbers](#) [Transfer numbers](#)

Showing 3  [Add more numbers](#)

☐ Number	Assigned to	Created on	Updated on	Updated by
☐ (520)	Not assigned	04/15/2026		⋮
☐ (520)	Kelsi Wieler	04/15/2026		⋮
☐ (520)	Default	04/15/2026		⋮

2. View a list of all numbers, including:

- **Assigned to**
- **Created on**
- **Updated on**

Assign a Phone Number

Assign phone numbers to users or groups so they can be used for calling, SMS, or other XBERT communication channels. This ensures conversations are properly routed and managed by the appropriate team or AI Employee.

Assign phone number



Phone Number

(520) 277-2516

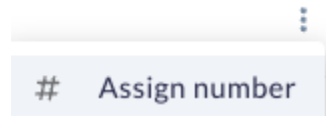


Assign To

Admin group

Admin Group

1. In the **Numbers** list, select the **more options** (⋮) menu next to a number.



2. Select **Assign number**.
3. Review the selected **phone number**.
4. Select who to assign the number to from the **Assign To** dropdown.

Assign To

Admin group

5. Select an **Admin Group** (Optional).

Admin Group

6. Select **Assign number** to confirm.

Assign number

Add Numbers

1. Select **Add more numbers**.

Add more numbers

2. Choose between **local numbers** or **toll-free numbers**.

Local numbers Toll-free numbers

🔍 Search by area code or number

You can add up to 25 numbers to your account. Adding phone numbers to your account may result in additional usage charges on your next invoice.

3. Search by **area code or number**.

🔍 480

You can add up to 25 numbers to your account. Adding phone numbers to your account may result in additional usage charges on your next invoice.

Cancel

Search

4. Select **Search** and choose from available results.

5. Check the numbers you wish to choose.

- ☒ (480) 944-1029
- ☐ (480) 944-1471
- ☐ (480) 944-1502
- ☐ (480) 944-1538
- ☐ (480) 944-1539
- ☐ (480) 944-1549

6. Select Buy numbers.

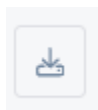
Buy numbers

XBert Tips:

- You can only add numbers that are included in your plan. Additional numbers may require purchase.
- Every account comes with 1 local number and 1 toll free number. Any additional phone numbers purchased will be billed to your company's account.
- Each account can have up to 25 local DIDs and 3 toll-free numbers.
- If you exceed these limits, a message will display, and you won't be able to add more numbers of that type until one is removed.

Download Numbers

Select the **Download icon** to export your CSV number list.



Transfer Numbers (Porting)

Transfer existing numbers to Nextiva.

1. Select the **Transfer numbers** tab.

Transfer numbers

2. Review the transfer requirements:

Numbers

Numbers Transfer numbers

ⓘ Important: Do not cancel your current service until the transfer is complete, as inactive numbers cannot be transferred. Ensure any open orders are processed or canceled before starting. ✕

To transfer your phone number, you'll need:

- Billing and account details
- Latest phone bill with the phone numbers displayed
- Your current provider's info
- The type and number of lines to transfer

If you are transferring **more than 15 numbers**, [Download our template](#).

Nextiva will send three emails throughout the process:

1. Confirmation that the transfer request has been submitted, and a transfer date has been requested.
2. A notification confirming the transfer date.
3. Within 48 hours of completion, you'll receive the final confirmation. Once received, you can cancel your service with the previous provider.

When will my transfer be completed?

The transferring process generally takes 2 to 4 weeks (average 10 business days) to complete from the time of submission. We will check the status of the transfer request daily and inform you via email as soon as we receive a confirmed scheduled transfer date from the current carrier.

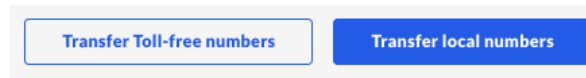
During this time, you will have service with both Nextiva and your previous provider. You are encouraged to set up your Nextiva phone system using the temporary numbers assigned to you before the completion of transferring.

3. Select:

a. **Transfer local numbers**

Or

b. **Transfer toll-free numbers**



4. Complete the **LOA (Letter of Authorization)** to begin the transfer process.

Letter of Authorization (LOA) Completion

Complete the LOA process to transfer (port) your phone numbers to Nextiva. This process verifies your authorization and gathers the required information from your current provider.

Important: If you are working with Service Delivery, wait until your Project Manager directs you to this process.

1. Select **Begin Signing**.

Welcome!

Nextiva Local LOA

Begin Signing

Powered by  docusign

[Privacy](#) | [Terms](#) | [Cookie Notice](#) | [Report Abuse](#)

2. Enter the **Authorized Signer Name** (must be authorized with your current carrier).

Authorized Signer Name *

The signer for this form must be authorized with the current carrier to port numbers away

3. Enter the **Authorized Signer Email**.

Authorized Signer Email *

4. Enter additional **contact emails** to receive porting updates (optional).

Contact Emails

List the emails you would like to receive porting updates. Comma separated.

5. Select **Next**.

Next

6. Select **Standard** or **Scheduled** port:

Standard or Scheduled Port? *

Scheduled ports must be 2-4 weeks from today. Standard ports - the soonest date possible will automatically be chosen.

☒ Standard

☐ Scheduled

XBert Tip: The following are the timelines for porting

- Standard – Earliest available date
- Scheduled – Select a specific date (2–4 weeks out)

7. Select a **port time**.

Port Time *

Time Zone: Mountain. Port times are not guaranteed.

-- Select --

8. Enter a **Caller ID** (name shown on outbound calls).

Caller ID

Caller ID is the name that will show on outbound calls, maximum 15 characters including spaces. No special characters.

9. Indicate if you are transferring **messaging services (SMS/MMS)**.

Are you transferring messaging services to Nextiva? *

Messaging services include SMS/MMS services.

☐ Yes

☐ No

10. Enter your **Nextiva Account Name**.

Nextiva Account Name *

Nextiva Academy

11. Review your **Nextiva Account Number** (pre-filled).

Nextiva Account Number - DO NOT EDIT *

12. Select **Next**.

Next

13. Enter your **Current Service Provider**.

Current Service Provider *

⊗ The field is required

14. Indicate if you have a **current invoice** available.

Do you have a current invoice from your current provider to upload? This is not required to submit your port request. *

You will upload this at the end of the form.

☐ Yes

☐ No

15. Enter your **Billing Telephone Number**.

Billing Telephone Number *

This is likely your main number.

⊗ The field is required

16. Enter your **service address**.

Street Number *

Pre Direction

Street Name *

Street Type *

Post Direction

City *

State *

Zip *

17. Enter your **company name as it appears on your bill**.

Company name that shows on bill *

Company name with your current provider

18. Enter your **account number** with your current provider.

Account Number *

Account number with your current provider

19. Enter your **PIN** (if required by your provider).

PIN

A PIN is required for wireless numbers. Please note that some providers may require you to unlock, release, or otherwise authorize porting on their end. See your current provider to confirm any necessary requirements.

20. Select how many numbers you are porting.

How many numbers are you porting? *

☐ More than 15

☐ Less than 15

XBert Tip: More than 15 numbers may take longer.

21. Enter the **phone numbers** to transfer.

Number 1 *

22. Once a number is entered, select Voice or Fax from the drop-down menu.

Voice or Fax? *

Voice 

23. Continue entering number(s) as needed.

Number 2

24. Select **Next**.

Next

25. A summary of the information is provided. Review it before proceeding.

75% completed



Summary

Please review the information you have entered:



Review and continue

Message from Porting Department, Nextiva

Please review & sign your document. To begin the process of reviewing and signing your documents, please click the button below. Signing will not be complete until you have reviewed the agreement and you have confirmed your signature.

26. Read the **Electronic Record and Signature Disclosure**.

Please read the [Electronic Record and Signature Disclosure](#).

27. Check the **I agree** checkbox.

☒ I agree to use electronic records and signatures. *

28. Select the preferred language (Optional).

English (US) ▾

29. Select **Continue**.

Continue

30. Select **Start** to begin signing.

31. Add additional information about your account (optional).

Fill In

Additional information about your account (Optional):

Are you transferring messaging (SMS/MMS) services to Nextiva? Yes ☒ No ☐

32. Confirm if you are transferring messaging (SMS/MMS) services.

33. Add your **authorized signature**.

Printed Authorized End-User's Name: Kelsi Wieler

Authorized Signature: 


NCX Local LOA

34. Select **Finish** to complete the LOA.



Users

The **Users** page displays all users associated with your account and allows you to manage their access and profile details.

XBert Tip: New roles cannot be created and existing roles cannot be changed unless you also have NEXT.

Create a User

1. Under the People & AI section, select **Users**.

People & AI

 **Users**

 AI Employees

2. Select **Add User** in the top-right corner.

Add user

3. Fill in the new user's **profile details**.

First name *

Enter first name

Last name *

Enter last name

Email address *

Enter an email address

4. Choose one of the following:

- Select Save & send invite to send a login invitation email
- Select Save & Close to add the user without sending an invite

☐ Don't send welcome email at time of user creation ⓘ

5. Review the e911 address and change if needed.

Emergency 911 address * ?

Change address

9451 E Via de Ventura
Scottsdale, AZ, 85256, USA

XBert Tip: E911 is a safety feature that automatically provides emergency responders with your **registered address and phone number** when a 911 call is made. It ensures emergency services receive accurate location information when a 911 call is made, helping responders reach you quickly.

E911

How It Works

When someone places a 911 call:

- The call is routed to the **nearest emergency call center (PSAP)**
- Your **phone number and registered location** are shared with responders
- This helps emergency services **quickly identify and locate the caller**

Why It's Important

- Ensures **accurate location information** is available during emergencies
- Helps reduce response time
- Required for compliance with many VoIP and business phone systems

What You Need to Do

- Keep your **E911 address up to date** for each phone number
- Update the address if a device or user **changes location**
- Ensure remote or mobile users have the **correct registered address**

[Change e911 here](#)

6. Select **user role** from drop-down menu.

Role * ?

7. Select the **Timezone** from the drop-down menu.

Timezone *

8. Select **Skills** from the drop-down menu. A skill is a specific expertise assigned to agents, allowing for efficient routing of customer inquiries to the most qualified team member.

Skills ?

9. Select **Next**.

Next

XBert Tip:

 Your organization's contract may include a limit on the number of licensed users. Adding users beyond that limit could result in additional charges.

10. Toggle which communication channels the user should have access to.

✓ Profile — 2 Channel access — 3 Assign shared inboxes

**Which communication channels does
this user need access to?**

 Calling	☒
 SMS (text messaging)	☒
 Live chat	☒
 Email	☒
 Social media	☒
 Messaging apps	☒

11. Select **Next**.

Next

12. Determine which shared inboxes the user can access and manage, and which ones they can supervise.



Profile



Channel access



Assign shared inboxes

What shared inboxes does this user need to manage engagements from?

Shared inboxes

Select shared inboxes

Users assigned can view or receive engagements associated with these shared inboxes

Shared inboxes they supervise

Select shared inboxes to supervise

Inbox supervisors will get access to dashboards and reports for their shared inboxes

Shared Inboxes

Shared Inboxes

Select the inboxes the user will work from.

Users assigned here can:

- View conversations
- Respond to customers
- Manage engagements within those inboxes

Shared Inboxes They Supervise

Select the inboxes the user will oversee.

Supervisors can:

- Access **dashboards and reports** for those inboxes
- Monitor performance and activity
- This does **not** necessarily mean they are handling conversations directly

13. Select **Finish**.



14. Continue to Settings or Add another user.



Profile



Channel access



Assign shared inboxes



User added

To view a complete list of user settings, [Continue to settings](#)

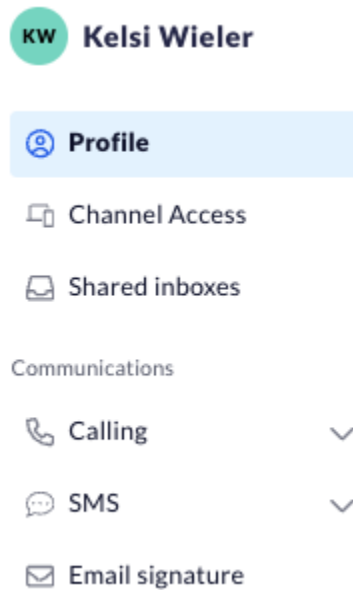
[Back to Users](#)

[Continue to settings](#)

[Add another user](#)

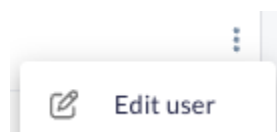
User Settings

User Settings allow you to manage individual user preferences, access, and communication configurations.



Accessing User Settings

1. Access once a new user is created by selecting Continue to Settings
Or
2. Navigate to User Settings
 - a. Access profile immediately once from Administration settings on the bottom-left.
 - b. Select Users.
 - c. Locate the user whom you would like to make changes to.
 - d. In the **Users** list, select the **more options (⋮)** menu next to a user.
 - e. Select **Edit user**.



Review or Edit User Settings

Profile

Manage user profile details, security settings, and personal preferences, including avatar, password, and emergency contact information.

1. Access [user settings](#).
2. Select profile in the left menu bar.

A light blue rectangular button with a circular icon containing a person silhouette on the left and the word "Profile" in bold black text on the right.

Update User Avatar

Customize your avatar with an image or color to personalize your profile and make it easier to identify users in the system.

1. Select **Edit avatar**.



Edit avatar

2. Choose one of the following options:

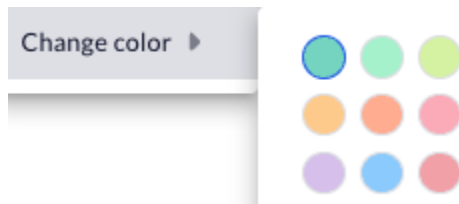
Add photo

Change color ▶

- Add photo
 - i. Select **Add photo** to upload an image.
 - ii. Select image from computer.
 - iii. Select Open.

A blue rectangular button with the word "Open" in white text.

- Change Avatar Color.



- i. Select **Change color**.
- ii. Choose a background color.

Reset Password

Reset a user's login credentials.

1. Select **Reset password**.

Reset password

2. Follow the prompts to complete the password reset process.

Change Emergency 911 Address (E911)

Set or update the user's emergency address for 911 services.

1. Select **Change address**.

Change address

2. Update the details, as needed.

Address *	
9451 E Via de Ventura	
Location Type	Location Type Details ?
Select apt, suite, floor, etc. ▼	Enter location type details
City *	State *
Scottsdale	Arizona ▼
Zip code/postal code *	Country *
85256	USA

Note: An [E911](#) address is required to ensure emergency services can locate the user when dialing 911.

Delete User

Remove a user from the account.

1. Select **Delete user**.

Delete user

2. Confirm the deletion when prompted.

Save Changes

Select save when finished to save changes.

Save

Channel Access

Enable or restrict [channel](#) access to control how users communicate with customers across XBert.

1. Access [user settings](#).
2. Select **Channel Access** in the left menu bar.
3. Toggle channels on or off to grant or restrict access.

 Channel Access

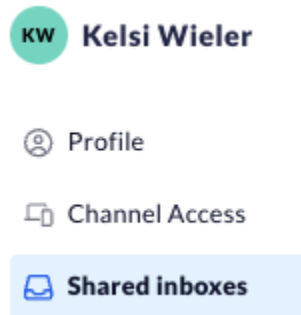
4. Select save when finished to save changes.

Save

Shared Inboxes

Use Shared Inboxes settings to control where a user can manage conversations and monitor inbox activity.

1. Access [user settings](#).
2. Select [Shared Inboxes](#) in the left menu bar.



3. Search and select shared inboxes.

Shared inboxes ?

Search and select shared inboxes

Users assigned can pick up or receive tickets associated with this inbox.

Shared inboxes they supervise ?

Search and select shared inboxes to supervise

Inbox supervisors will get access to dashboards and reports for their inboxes.

4. Select Save.

Save

Calling

Configure calling settings to manage how users make and receive calls, including voicemail, forwarding, routing, recording, and monitoring options.

1. Access [user settings](#).
2. Select **Calling** in the left menu bar.

Communications

 Calling

Voicemail

Forwarding

Call routing

Call recording

Monitoring

Phone numbers

3. Select save when finished to save changes.

Save

Voicemail

Configure voicemail greetings and settings for your calling channel.

Enable Voicemail

Toggle **Voicemail** on to enable voicemail for the user or number.

Voicemail



Voicemail Greeting

Set or update the voicemail message callers will hear.

2. Select **New greeting** to create a custom greeting.

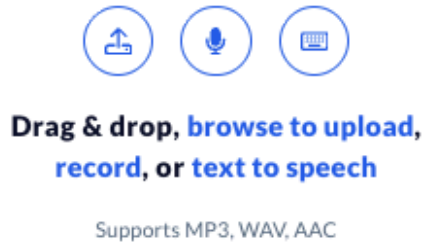
Voicemail greeting

New greeting

3. Enter a **greeting title**.

Greeting Title *

4. Choose one of the following options:



a. **Upload** an audio file (MP3, WAV, AAC)

Upload a pre-recorded audio file from your computer to use as a voicemail greeting.

- i. Select the **upload icon**.



- ii. Browse and select an audio file from your computer.

XBert Tip: Supported file formats include MP3, WAV, and AAC.

- iii. Select **Open**.
- iv. Select **Save** to apply the greeting.

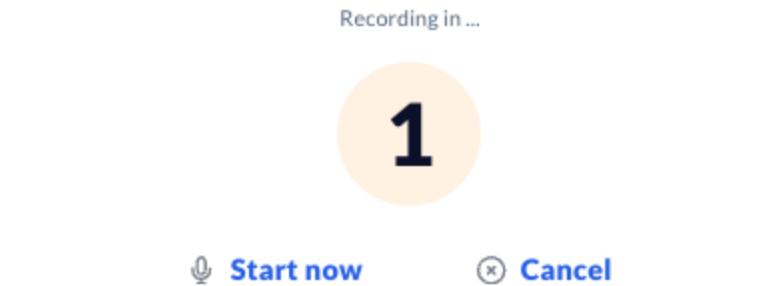
b. **Record** a Voicemail Greeting

Create a voicemail greeting by recording your own message.

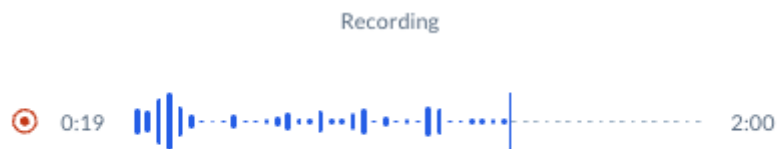
- i. Select the **record** option when creating a new greeting.



- ii. Select **Start now** to begin recording.



- iii. Speak your message clearly while recording is in progress.



- iv. Select the **stop button** to end the recording.



- v. Select **Play** to listen to your recorded message.



- vi. Select **Record again** to re-record the greeting.



- vii. (Optional) Select **Download** to save the audio file.



- viii. Select **Remove** to delete the recording.



c. Create a **text-to-speech Greeting**.

- i. Select the Text to speech icon.



- ii. Write your voicemail greeting message in the text field.

Text to speech

Write your voicemail greeting

- iii. Select the voice that you would like to use.

Adam (US English) ▼

- iv. Select **Play preview** to hear how the greeting will sound.

 **Play preview**

- v. Select **Download** to save the audio file (Optional).

 **Download**

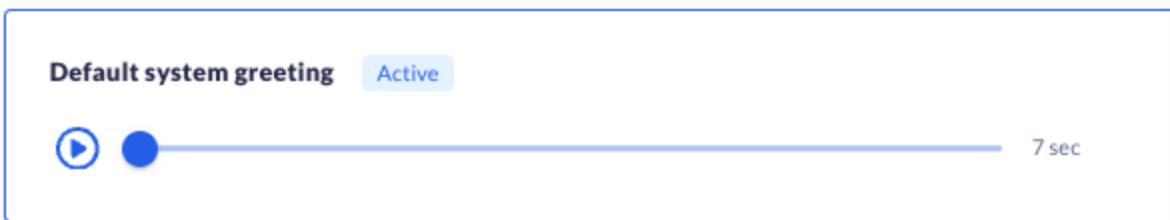
5. Select **Save** to apply the greeting.

Save

Default Voicemail Greeting

Use the system-provided greeting if you do not create a custom one.

1. Review the **default system greeting**.



2. Select **Play** to listen to the greeting.



3. Confirm it is marked as **Active** if you want to use it.

Active

Voicemail Options

Configure when calls are sent to voicemail by selecting the **number of rings** before the call is directed to voicemail.

Number Of Rings Before Going To Voicemail

Call Forwarding

Configure where calls are forwarded based on different conditions.

Always Forward

Forward all incoming calls to another number.

Always forward

Automatically forward all your calls to a different phone number



1. Enter the **phone number** in the **Forward to** field.

Forward to *

Enter a phone number

2. Select **Activate** to enable forwarding.

Activate

Forward When Unanswered

Forward calls only if they are not answered.

Forward when unanswered

Forward incoming calls to a different number when they're not answered



1. Enter the **phone number** in the **Forward to** field.

Forward to *

Enter a phone number

2. Select the number of **rings** before forwarding.

Rings

5 ▼

3. Select **Activate**.

Activate

Forward When Unreachable

Forward calls when your device is unavailable.

Forward when unreachable

Forward incoming calls to a different number when you are not reachable



1. Enter the **phone number** in the **Forward to** field.

Forward to *

Enter a phone number

2. Select **Activate**.

Activate

Forward When Busy

Forward calls when you are already on another call.

Forward when busy

Forward incoming calls to a different number when your phone is busy



1. Enter the **phone number** in the **Forward to** field.

Forward to *

Enter a phone number

2. Select **Activate**.

Activate

Call Routing

Control how incoming calls are handled based on your availability and caller type.

Call Waiting

Allow multiple calls at the same time.

Call waiting ⓘ

Receive additional calls while on an active call.



Toggle **Call waiting** on to receive additional calls while already on a call.

Anonymous Call Rejection

Block calls from unidentified numbers.

Anonymous call rejection ⓘ

Reject calls from all anonymous numbers.



Toggle **Anonymous call rejection** on to reject calls from anonymous or blocked numbers.

Call Recording

Control whether calls are recorded and how participants are notified.

Auto Enable Call Recording

Automatically record calls when they begin.

1. Toggle **Auto enable call recording** on to start recording at the beginning of calls.

Auto enable call recording

When enabled, call recording will automatically begin at the start of this agent's My Inbox calls. Agents will be able to stop and resume call recording during calls.



2. During a call, users can **pause and resume** recording as needed.

XBert Tip: Call transcription and AI summarization are only available when call recording is enabled.

Recording Announcements

Notify participants when recording starts or stops.

Play recording announcement ⓘ

When enabled, an announcement will play when call recording starts and stops, notifying the end user that the call is being recorded.



Toggle **Play recording announcement** on to play a notification when recording begins and ends.

XBert Tip: If disabled, participants will not be notified when recording starts or stops.

Monitoring : Busy Lamp Field

Monitor the call status of other users directly from your device, making it easier to manage calls and assist team members.

The **Busy Lamp Field (BLF)** lets you see the real-time call status of other users directly on your phone or device.

How It Works

- Displays whether a user is **available**, **on a call**, or **ringing**
- Often shown as a **light or indicator** next to a user's line
- Allows you to quickly identify who is available before transferring a call

Common Use Cases

- **Administrative assistants** managing calls for executives
- **Receptionists** routing calls efficiently
- **Managers** monitoring team availability

Why It's Useful

BLF helps reduce delays and guesswork by showing who is available, making call handling and transfers faster and more efficient. BLF is commonly used by administrative assistants for call handling and by managers to monitor team activity.

View whether other users are on an active call.

1. Toggle **Busy lamp field (BLF)** on to enable monitoring.

Busy lamp field (BLF) ⓘ

Allows for monitoring of other users call status. Showing you when they are on or off an active call using your device lines.



2. Search and add users in the **Monitored users** field.

Monitored users Monitoring 0 of 50 users

Search and add monitored users

- Added users will appear in the list for tracking.

Order	Name
No users are currently being monitored.	

- Select **save**.

Save

XBert Tips:

- Your device may **restart** after saving changes.
- BLF line keys may not update until after saving.

Phone Numbers

Assign phone numbers and extensions to control how users make and receive calls within XBert

Default Outgoing Number

Set the number used for outbound calls. The number is automatically used for outgoing calls unless you select another.

Default Outgoing Number * ?

Select a **Default Outgoing Number** from the dropdown.

Extension

Assign an internal extension to the user.

Extension * ?

Select an **Extension** from the dropdown.

Assigned Numbers

Manage additional numbers assigned to the user.

1. Select **+ Assign additional phone numbers**.



2. Select a number from the **Assign Number** dropdown.

Assign Number

3. Confirm the assignment.

XBert Tip: Assigned numbers allow the user to receive calls on multiple lines.

4. Select **Save**.



SMS

Set up automatic responses to incoming messages when you're unavailable or outside business hours.

1. Access [user settings](#).
2. Select **SMS** in the left menu bar.



Automatic replies

3. Select save when finished to save changes.

Save

Enable Auto Reply

Send automatic responses to incoming SMS messages.

Use auto reply



Toggle **Use auto reply** on to enable automatic replies.

After Hours Auto Reply

Send responses only outside of working hours.

Use after hours auto reply



Toggle **Use after hours auto reply** on to respond when you are unavailable.

Email Signature

Create and customize the signature that appears in your outgoing emails.

1. Access [user settings](#).
2. Select Email Signature in the left menu bar.

 Email signature

3. Enter your signature in the **text editor**.

Create your signature

4. Use the formatting toolbar to customize:

- Font and size
- Text color
- Bold, italic, underline
- Alignment and formatting options



5. Preview your signature as you edit.
4. Select **Save** to apply your signature.

Save

Schedules

On the **Schedules** page, administrators can create and manage Business and Holiday schedules. These schedules determine when XBert handles customer interactions.

Creating a Schedule

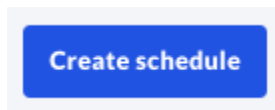
1. Select AI Employee.



2. Under the Manage section, select **Schedules**.



3. Select **Create Schedule** in the top-right corner.



4. Enter a **schedule name**.

Schedule name *

5. Select a **schedule type** from the drop-down menu (e.g., Business hours).

Schedule type *

6. Enter a **description** (Optional).

Description

Configure Schedule Hours

1. Use the toggle next to each day to mark it as **open** or **closed**.

☒ Friday to ☐ All day

[Add time slot](#)

☐ Saturday

2. For open days, choose

- **All day**

☒ Monday ☒ All day

Or

- Set specific **start and end times**.

☒ Wednesday to ☐ All day

3. Leave a day toggled off to mark it as **closed**.

☐ Saturday

4. Select **Add time slot** to define multiple time periods within the same day, such as breaks or split shifts.

[Add time slot](#)

- a. Continue adding time slots as needed

 **Wednesday**

 9:00 AM ▼	to	 05:00 PM ▼
 06:00 PM ▼	to	 07:00 PM ▼
 08:00 PM ▼	to	 09:00 PM ▼

- b. Remove any slot to adjust your schedule.

[Remove](#)

5. Use additional time slots to resume normal hours after breaks (e.g., 9 AM–12 PM and 1 PM–5 PM)
6. Select **Save** to apply your schedule.

[Save](#)

XBert Tips:

- Include the **AI Employee name** in the description for easier identification later.
- Avoid using special characters in schedule names or descriptions.
- Schedule names must **not start with a number**.

Examples:

- Acceptable: *Holiday Schedule 2026, BusinessHours9am_to_5pm*
- Unacceptable: *9-5 Business hours, Business/break hours, Holidays (New Years), TimeOff!*

Editing a Schedule

Update an existing schedule's hours and availability.

1. Select the **more options** (⋮) menu next to the schedule.



2. Select **Edit Schedule**.
3. Make [necessary changes to the schedule](#).
4. Select **Save** to apply your changes.

Save

Delete a Schedule

Remove a schedule from your account.

1. Select the **more options** (⋮) menu next to the schedule.
2. Select **Delete Schedule**.



3. Confirm the deletion when prompted.

Delete

Channels

Under **Channels**, administrators can manage settings for any channel assigned to an AI Employee. From here you can manage [calling](#), [SMS texting](#), [Live Chats](#), and [Calendar Integrations](#).

Calling (Number) Settings

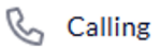
These settings control **how the phone number itself operates**, regardless of the user.

This includes features like:

- Call recording
- Transcription
- Announcements
- General number-level configurations

These settings apply to the **number**, [not the individual user](#).

1. From the Channels section, select **Calling**.



2. View your **outbound call settings** for your numbers on this screen.

Settings		
Primary inbound numbers (520) 277-2399	Use for outbound calling Yes	Use for extension dialing No
Call recording ✔ Enabled	Real-time transcription ✖ Disabled	Music on hold Default

Call Recording

Access and manage call recordings to review conversations, monitor quality, and reference past interactions.

Calling

Setup and configuration Call recording

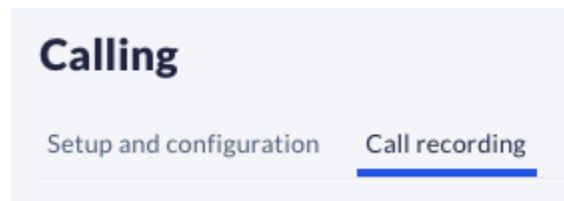
Call recordings & transcriptions

Search Showing 2 Filters

☐	Recording ID	Call ID	From	To	Inbox	Created on
☐	1776282563005	af3d0405-b40b-4e34-b...	+148029022...	B Bertie	General inbox NRGX-2	Apr 15, 12:48 PM 01:11
☐	1776282173065	b319767f-91ad-4369-8...	+148029832...	B Bertie	General inbox NRGX-1	Apr 15, 12:42 PM 00:43

Total 2 items < 1 > 10/page

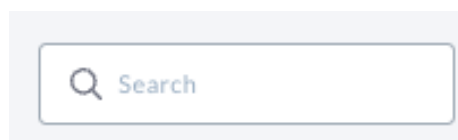
1. Select **Call Recording** Tab.



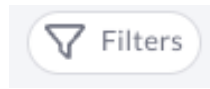
2. Review the list of recordings, including:

- a. **Recording ID**
- b. **Call ID**
- c. **From / To**
- d. **Inbox**
- e. **Created date**
- f. **Duration**

3. Use the **Search** field to find specific recordings.



4. Select **Filters** to refine results.



Use filters to refine and locate specific call recordings.

Filters ×

Location

Inbox

Agent

Maximum Duration

Date range

- a. Enter or select filter criteria:
- **Location** – Filter by call location
 - **Inbox** – Filter by associated inbox
 - **Agent** – Search by user name or number
 - **Maximum Duration** – Filter calls by length
 - **Date Range** – Select a time period
- b. Select **Apply** to update results.



5. Select the **play icon** to listen to the recording.



6. Select the **open icon** to view details.



7. Select the **download icon** to save the recording.



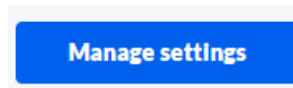
8. Select the **delete icon** to remove the recording.



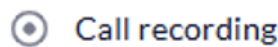
Call Recording Settings

Configure how calls are recorded and managed at the **phone number level**, including storage, notifications, and compliance settings. Learn more about managing [Call Recordings](#).

1. On the right-hand side, select **Manage Settings**.



2. On the left-hand margin, select **Call Recording**.



3. Select a **file server** to store recordings.

File server

4. Enter a **filename format** to define how recordings are labeled.

Filename format ?

5. Toggle **Apply recording consent on two-party regions** to require consent before recording.

Apply recording consent on two party regions ?



6. Toggle **Disable recording on two-party regions** to prevent recording in restricted areas.

Disable recording on two party regions ?



7. Select a **recording notification prompt (ring tone)** to play during calls.

Recording notification prompt

8. Select a **notification interval** to repeat the message at set times.

Recording notification interval

9. Adjust the **recording percentage** to control how many calls are recorded (e.g., 100% = all calls).

Recording percentage

0  100

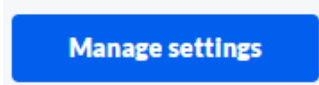
- 0% – No calls are recorded
- 100% – All calls are recorded

10. Settings automatically save.

Phone Number Settings

Configure which phone numbers are used for inbound and outbound calling.

1. On the right-hand side, select **Manage Settings**.

A blue rectangular button with the text "Manage settings" in white.

2. Select the phone number used to receive incoming calls by choosing a **phone number** from the dropdown.

Number

A search-style dropdown menu. It has a light gray border. Inside, on the left, is a pill-shaped button containing the text "(520) 277-2399" and a small "x" icon to its right. To the right of this pill is the word "Search" in a light gray font. On the far right of the dropdown is a small downward-pointing arrow icon.

3. Use the **search field** to find and assign a number.

XBert Tip: Inbound numbers determine which number customers call to reach your AI Employee or team.

3. Control how calls are made from this user or AI Employee by toggling **Use for outbound calling** on to allow this number to be used when placing calls.

Use for outbound calling



4. Toggle **Default for extension calling** on to set this as the default number for internal extension calls.

Default for extension calling



XBert Tip: Outbound settings control which number is displayed when making calls and how internal calling is handled.

Transcriptions

Configure transcription settings to control when calls are transcribed, how much is captured, and whether transcripts are generated in real time.

1. On the left-hand margin, select **Transcriptions**.

 Phone numbers

☐ Call recording

☒ **Transcriptions**

2. Set the **start time** and **end time** to define when transcriptions are allowed.

Start time

12:00 AM



End time

11:59 PM



3. Enter a **minimum duration** (in seconds) to only transcribe calls that are at least this long

Minimum duration (sec)

0

Example: Set to 30 seconds to skip very short or accidental calls

4. Enter a **maximum duration** (in seconds) to limit transcription to calls up to this length.

Maximum duration (sec)

86400

Example: Set to 3600 seconds (1 hour) to avoid transcribing very long calls

5. Adjust the **percentage of the maximum minutes** to control how much of the call is transcribed. This controls how much of each call is transcribed, based on the maximum duration setting.

Percentage of the maximum of minutes

0  100

- **100%** – Transcribes the full call (up to the maximum duration)
- **Lower values** – Limit how much of the call is transcribed

For example, setting this to 50% will transcribe only half of the allowed call duration.

6. Select a **language** for transcription from the dropdown menu.

Languages

7. Toggle **Enable real-time transcription** to generate transcripts during the call.

Enable real-time transcription ☐

8. Toggle **Only transcribe while call is recorded** to limit transcription to recorded calls.

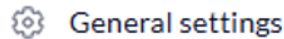
Only transcribe while call is recorded ☐

9. Settings automatically save.

General Settings

Configure call behavior, music, and advanced calling options for your phone number.

1. On the left-hand margin, select **General Settings**.



2. Select a **Music On Hold** option from the dropdown (e.g., Default or a custom selection). This is the audio played to callers while they are on hold.

Music

Music On Hold

Default

3. Toggle **Spoof ANI On Agent Transfer** on to display the **original caller's number** when a call is transferred.

Spoof ANI On Agent Transfer



XBert Tip: When enabled, the receiving party will see the original caller's phone number instead of the transferring user's number. This helps maintain context during call transfers.

4. Toggle **Use for extension calling** on to allow this number to be used for internal extension dialing.

Extension Calling Settings

Use for extension calling



5. Toggle **Default for extension calling** on to set this as the default number used for extension calls.

Default for extension calling



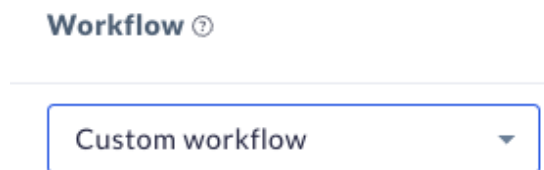
6. Settings automatically save.

Custom Workflow

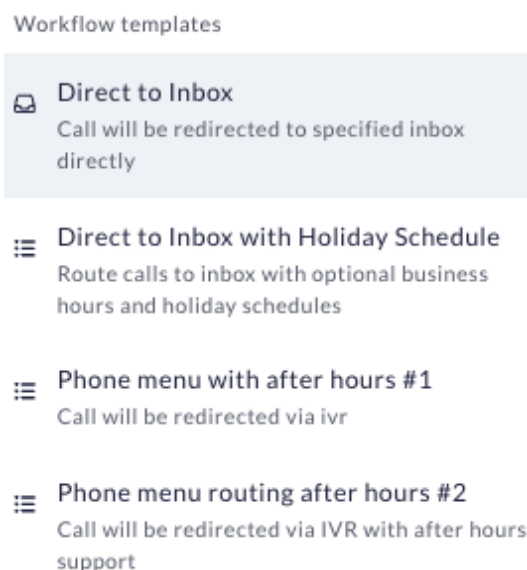
Workflows define how customer interactions are routed and handled across channels such as calling, SMS, email, and live chat. You can use predefined templates or create custom workflows to control the customer journey.

This may not be available if you do not also utilize NEXT.

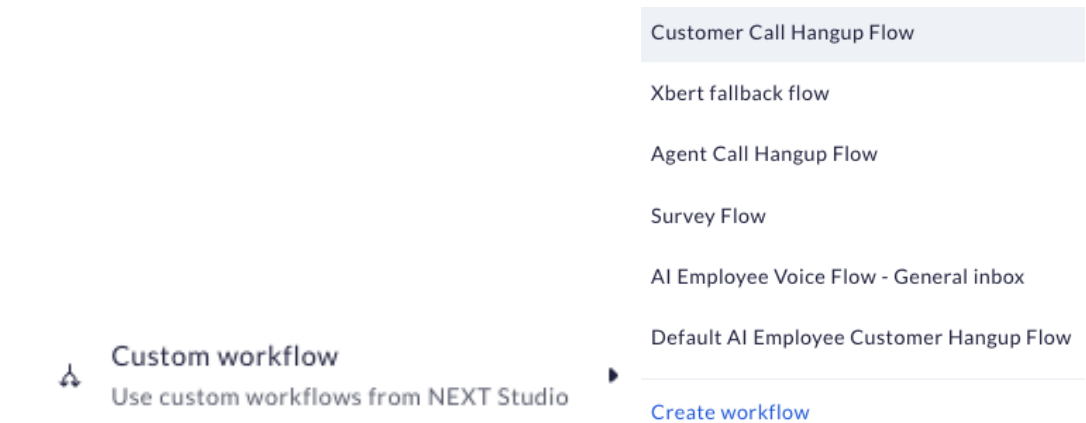
1. The list of phone numbers at the bottom of the main calling page allows you to access workflow quickly.
2. Select the phone number you wish to manage.
3. Open the **Workflow** dropdown.



4. Choose a workflow template, such as:
 - **Direct to Inbox** – Sends calls directly to a selected inbox
 - **Direct to Inbox with Holiday Schedule** – Routes calls based on business and holiday hours
 - **Phone Menu (IVR)** – Guides callers through menu options
 - **24/7 Receptionist** – Routes calls with overflow and escalation handling



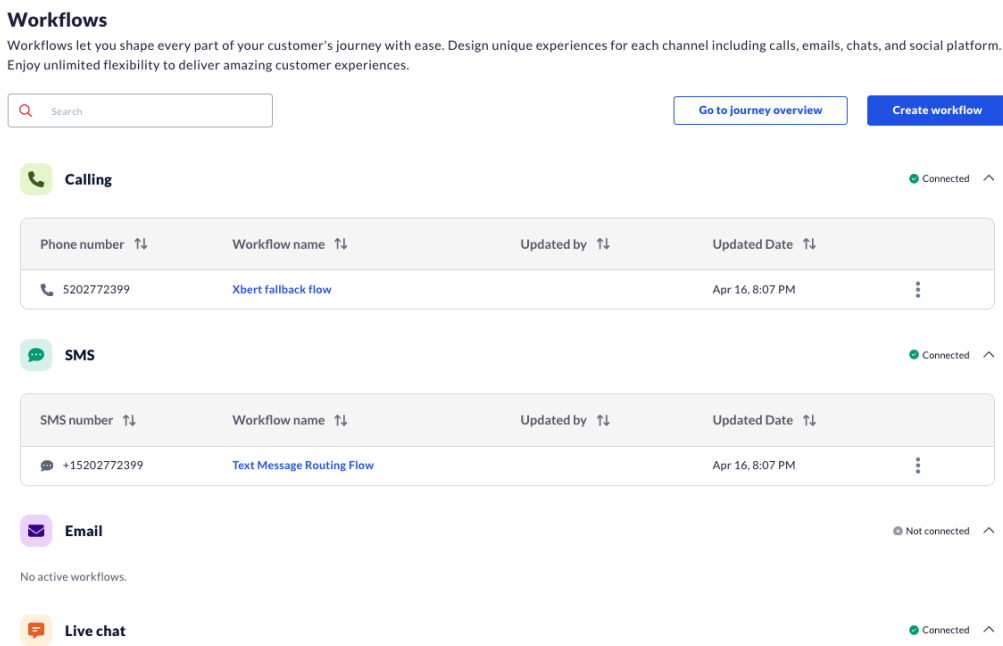
5. Select **Custom workflow** to use workflows created in NEXT Studio.



6. Select a workflow from the list to assign it to the phone number or channel.



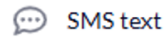
7. Select **Create workflow** to build a new custom workflow.



8. Select **Save** to save changes.

SMS Text

1. From the Channels section, select **SMS Text**.



2. Use this page to quickly access [10DLC registration](#):
 - a. Verify approval.

Status:

Approved

Company type:

Private Company

- b. Locate an incomplete status and resume Registration.

Latest submission

Status:

Incomplete

Company type:

Private Company

Edited by:

Kelsi Wieler

Last edited:

05/01/2026

Resume registration

Or

- c. Delete the registration submission.

Delete

Live Chat

View and manage your live chat widgets, including quickly accessing the script for website installation.

Live chat

Q Search

Showing 2

Add live chat

☐	Name	Status	Created date	Script
☐	Bertie	Published	04/29/2026	Copy code ⋮
☐	Test	Published	04/29/2026	Copy code ⋮

1-2 of 2 < >

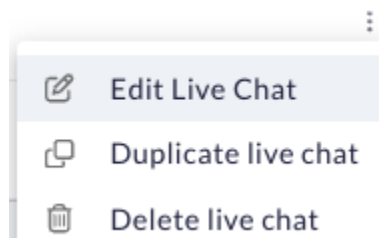
Access Live Chat Script

Use this script to add the live chat widget to your website.

1. Navigate to **Channels**.
2. Select **Live chat**.
3. Locate the desired live chat widget.
4. Select **Copy code** to copy the [installation script](#).

Manage Live Chat

1. Select the **more options (⋮)** menu to:

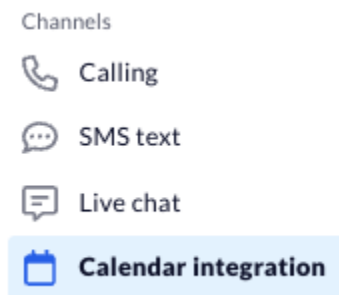


- [Edit the chat](#)
- Duplicate the chat
- Delete the chat

Calendar Integration

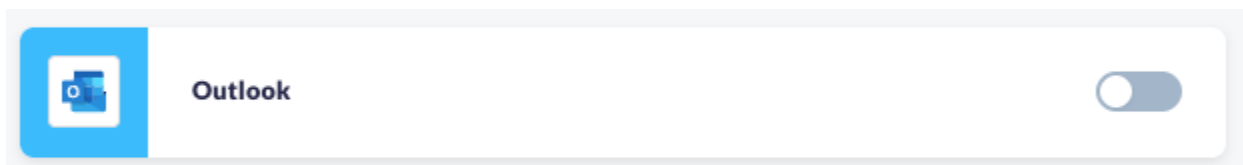
In the **Calendar Integrations** tab, you can integrate with Microsoft Outlook or Google Calendar. This allows XBert to work with your availability and book appointments directly on your calendar.

1. Under the Channels section, select **Calendar Integration**.



2. Select the **toggle to on** for the calendar you wish to integrate.

1. Outlook



- i. Review the following fields:

Configuration

Client ID

Tenant ID

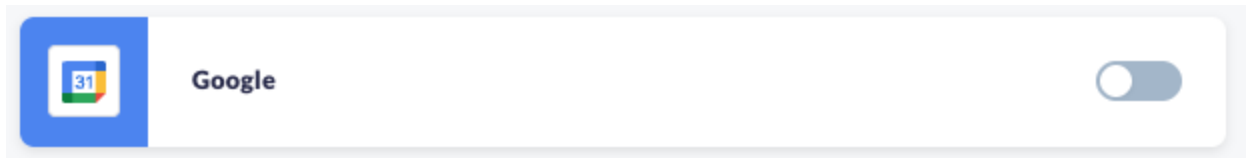
Client Secret

1. **Client ID** – Unique identifier for the integration

2. **Tenant ID** – Identifier for your organization or environment
3. **Client Secret** – Secure key used for authentication

- ii. Select the **copy icon** to copy the Client ID or Tenant ID.
- iii. Select the **visibility icon** to show or hide the Client Secret.

2. Google



- i. Review the following fields:

Configuration

Client ID

Tenant ID

Client Secret

1. **Client ID** – Unique identifier for the integration
 2. **Tenant ID** – Identifier for your organization or environment
 3. **Client Secret** – Secure key used for authentication
- ii. Select the **copy icon** to copy the Client ID or Tenant ID.
 - iii. Select the **visibility icon** to show or hide the Client Secret.

XBert Tip: To configure Client ID and Client Secret, please refer to your Calendar provider's instructions.

3. Select the **Save** button at the bottom.



Functions

Functions are reusable tasks that perform specific actions, such as looking up customer information, checking store hours, or sending a confirmation message. They allow your AI to take actions beyond answering questions, such as retrieving data or completing tasks. They're deterministic, which means they return the same result every time when given the same input.

You can reuse Functions across Journeys and Workflows to save time and keep things consistent.

Update an Existing Function

If you want to update an existing function, it is best practice to duplicate the function and edit the copy instead of editing/changing the original function.

Duplicating a Function

1. At the bottom of the Administration menu, select **Functions**.

NEXT Studio

$f(x)$ Functions

2. Search the default **function name** you wish to duplicate.

 Search

3. Select the **ellipses button** to the right of the Function name.

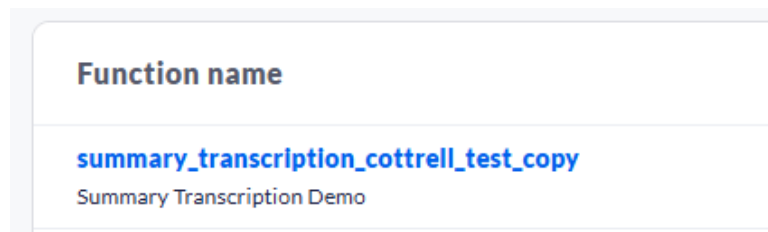
Jul 31, 6:48 AM



4. From the dropdown menu, select **Duplicate**.

 Duplicate

5. The duplicate function will appear at the top of the Functions list and will include “_copy” at the end of the name.



Editing a Function

1. Search the name of the function you wish to edit in the **search field**.

A search field with a magnifying glass icon on the left and the word "Search" in a light blue font.

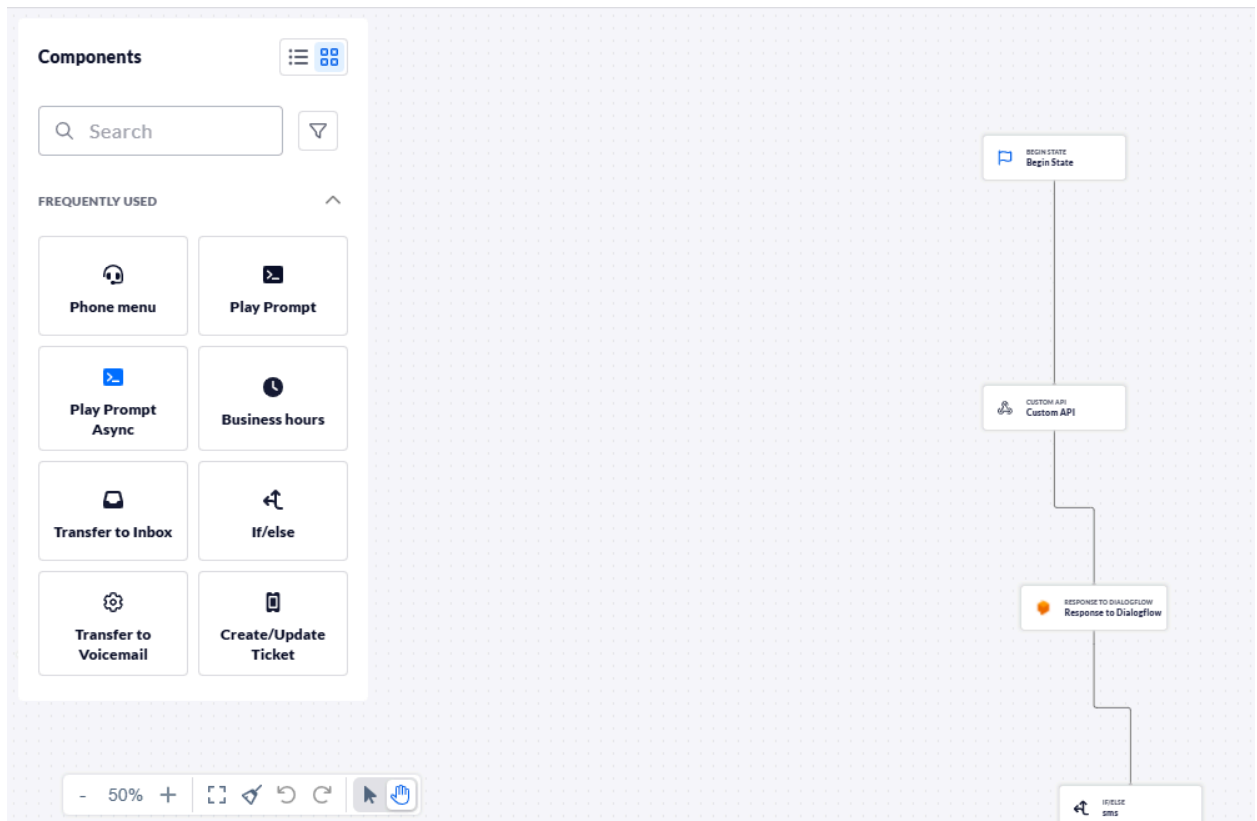
2. To edit a function, select the **ellipses button** to the right of the name.



3. From the dropdown menu, select **Edit**.



4. Update **specific fields and components** in the “Function Builder” page.



5. Select **Save** in the top-right corner.



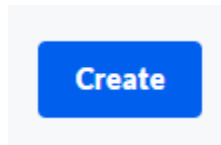
6. To exit without saving, select **Exit** in the top-right corner.



Creating a New Function

XBert Tip: Changing the default functions may impact other functionalities and cause issues within workflows, so they should remain unchanged.

1. From the Functions section, select **Create**.



2. In the pop-up window, give your new function a **name and description**.

Let's Name Your Function

Enter name

Describe What This Will Do

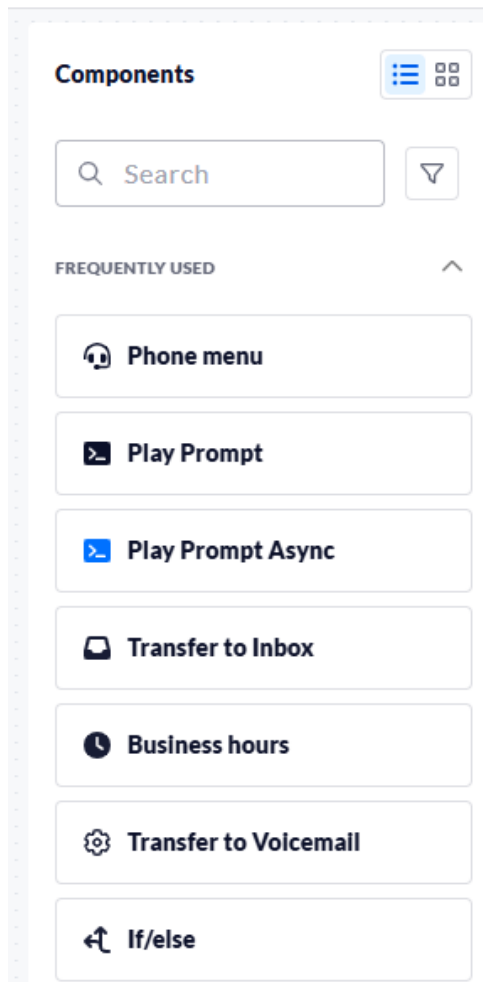
Describe what this will do

3. (Optional) Enable the feature to **allow AI Employees** to use this function.

Available For AI Employees To Use

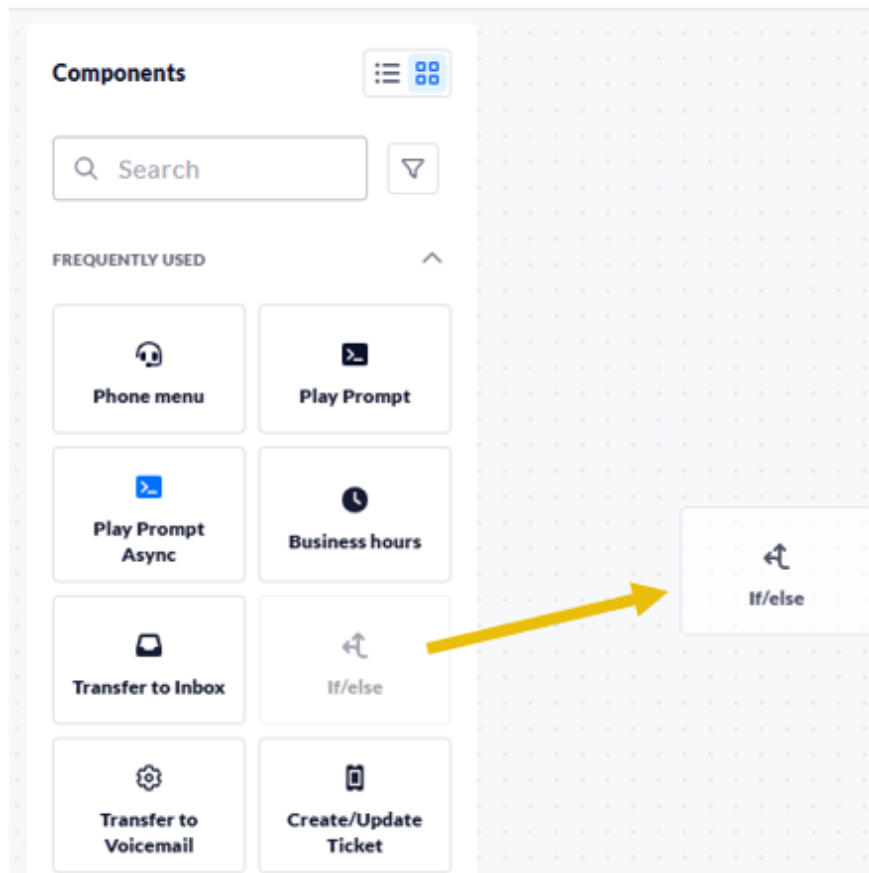


4. Once you are on the next page, the “Function builder” page, the **Components on the left hand side** will help you create your Function.



XBert Tip: Hover over the component to see a description of what it adds to a function.

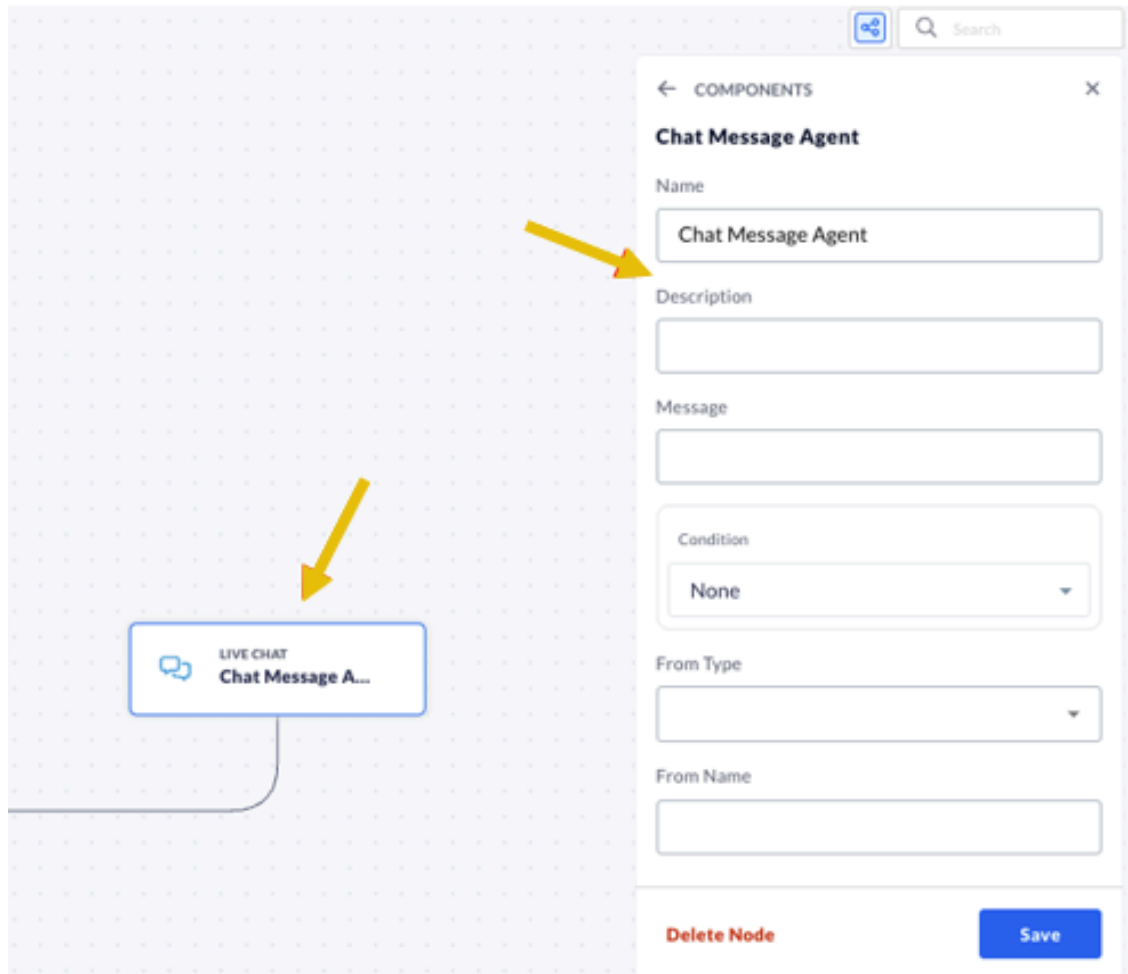
5. **Drag and drop** relevant Components into the main section of the screen to begin building your function. Once they're in the center, continue moving each component around by dragging and dropping them.



6. Selecting the **flow icon** to the left of the search bar will show you which action components are currently in use on the page, allowing you to quickly find and select specific ones.



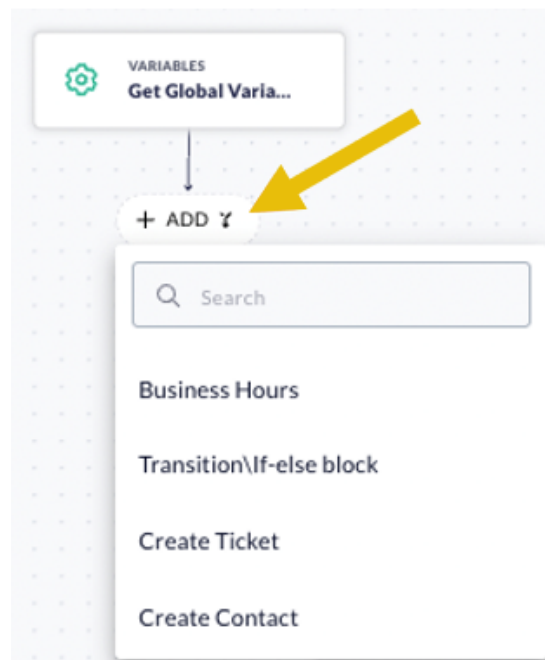
7. Once a Component is on the screen, **select it** to edit it. An **edit box** will appear on the right-hand side. Once you have selected it, the chosen component will have a blue box around it to indicate it is the one selected.



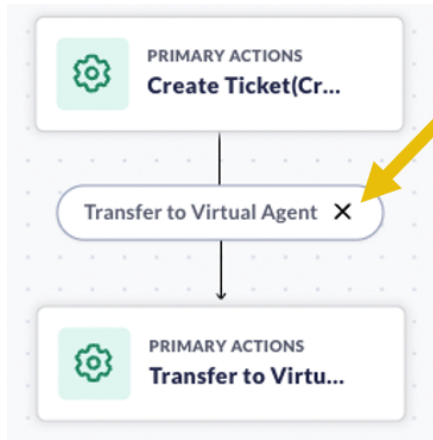
8. To delete a specific Component, hover over it and it will turn blue with a **red trash bin** icon.



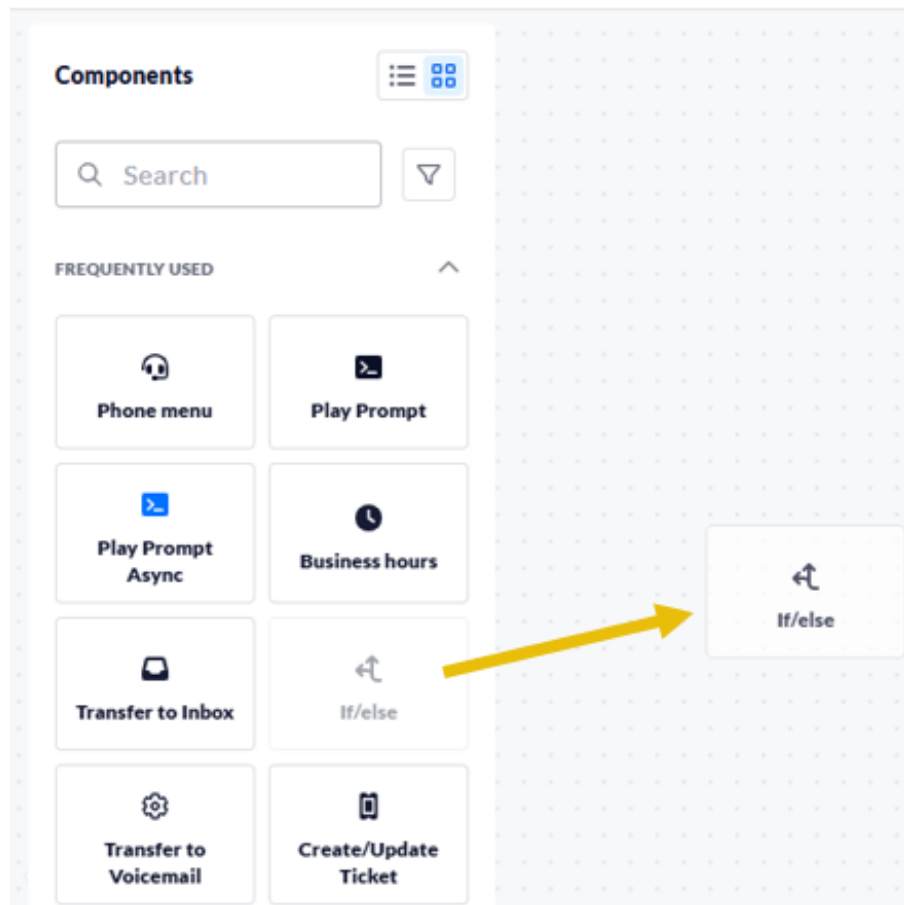
9. A secondary pop up will appear, asking you to confirm if you would like to delete it. Select the red **Yes button** to delete.
10. After you have added a new Component to the main section, an “Edge” will appear on the screen with **Add** on it. Select it to choose which option you want it to use from the drop down search area. Once you select a specific option, it will add additional steps to the flow.



11. To delete a specific “Edge” after it is created, the connection piece between two components, select the **gray X icon** to the right of the name. Then choose the red **Delete** button.



12. Scroll through the list area of Components to find the options to run your workflow. Continue to **drag and drop** the appropriate component(s) onto the builder page and select them to edit them as needed.



13. Once you are done or if you need to take a break from building the Function, select the blue **Save button** in the upper right hand corner.



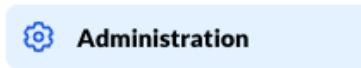
14. To abandon all work done up until this point, select the **Exit button**.



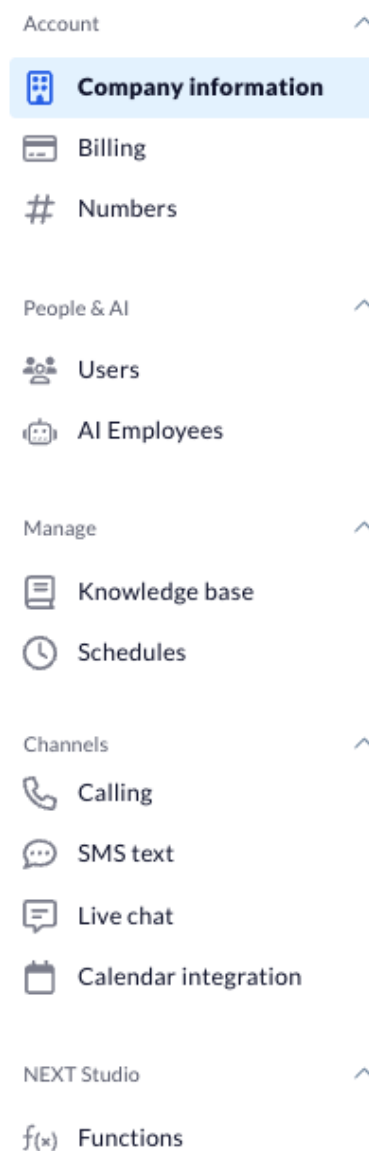
Administrative Access

Once access to Advanced Onboarding is complete, you may need to access Administration functions to complete tasks such as 10DLC registration.

1. Select Administration on the bottom left corner.

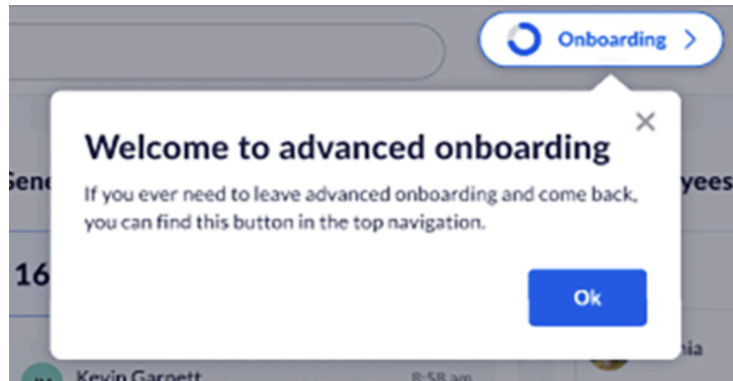


2. Use the toolbar to navigate to the area you need to access.

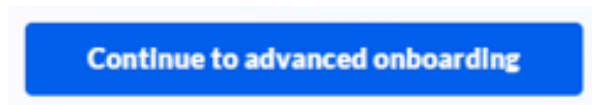


Start Advanced Onboarding

1. When the Advanced Onboarding pop-up appears, review the overview.



2. Select **Continue to Advanced Onboarding** to begin.



XBert Tip: Alternatively, select Let me look around on my own to exit. You can return to Onboarding by selecting the Onboarding icon later.

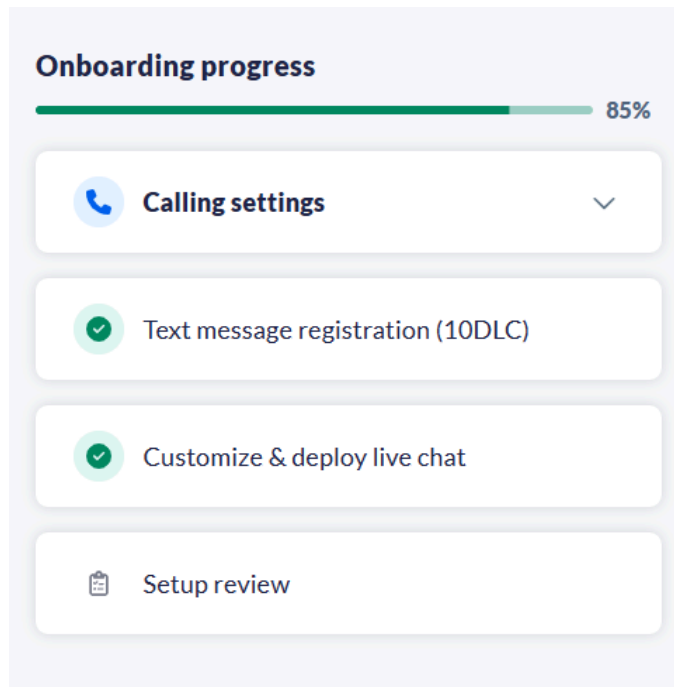


3. Select **OK** to proceed.

Progress bar

Once inside, review your progress panel on the left side of the screen:

- Completed steps are shown in green
- Remaining steps are listed below



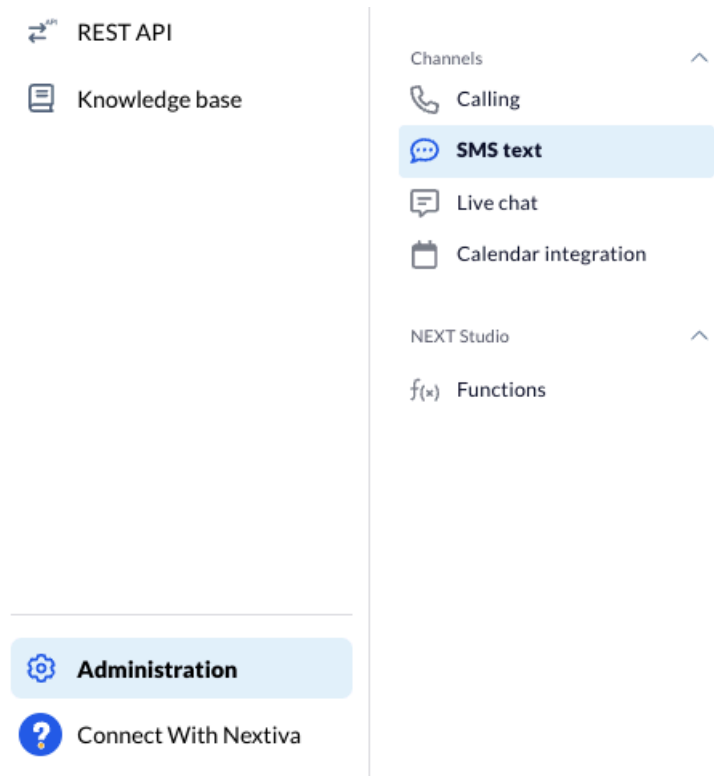
10DLC Text message registration

If you plan to use XBert for SMS messaging, you must register your business for **10DLC compliance**. While SMS may be available initially, completing registration ensures uninterrupted service.

Please keep the following information ready with you before you start registration:

- Required information described in company type.
- Business address.
- Link of working website or social media page.
- Link/screenshot/document of customer consent form that includes mandatory disclosures.
- Explanation of usage such as who the target recipients are, what are the messaging topics, etc.
- Script/documents of sample messages you're planning to send.
- Link/document of privacy policy.

This can be accessed by the Advanced Onboarding wizard, or by selecting SMS under Administration.

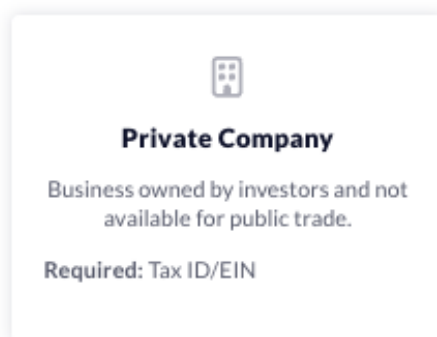


10DLC Process

Select Company Type

1. Review the available **company type options** and required information:

- Private Company



- Public Company



Public Company

Businesses whose shares are traded publicly on stock exchanges.

Required: Tax ID/EIN, Trade symbol, Business email

- Non-profit Organization



Non-profit Organization

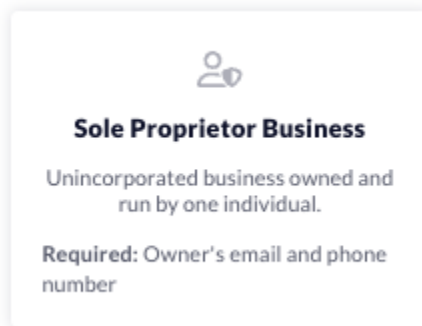
Organization that doesn't operate for the purpose of generating profit.

Required: Tax ID/EIN

- Government Company



- Sole Proprietor Business



2. Select the option that matches your business.
3. Review the **required information** listed for that type.
4. Select **Start registration** to continue.

Start registration

Brand Registration

Provide basic information about your business.

Brand Registration

Company type

Private company



[Edit](#)

Business type *

Select industry



1. Confirm or update your **company type** if needed.
2. Select your **business type/industry** from the dropdown.

Provide TAX ID/EIN

Provide TAX ID/EIN *

Enter Tax ID/EIN

Re-enter Tax ID/EIN

Tax ID/EIN will be added to your account information or replace existing record.

1. Enter your **Tax ID/EIN**.
2. Re-enter your **Tax ID/EIN** to confirm.

XBert Tip: This information will be added to or replace your account record.

Tell Us About Your Company

Enter your official business and location details.

Note: TCR verifies the brand's identity of public companies. Your application will not proceed for registration until brand verification is complete.

 Please make sure that your company details matches the TAX ID/EIN entered above.

1. Enter your company legal name.

Company legal name * 

Enter company legal name

2. Enter your DBA or brand name:

DBA or Brand name * 

☐ Same as company name

Enter brand name

- Select Same as company name if applicable, or
- Enter a different brand name.

11. Enter your business address.

Business address * 

Address

Enter address

City

Enter city

State

Select state 

ZIP code

Enter ZIP code

12. Enter your company website.

Company website * 

www.yourwebsite.com

Please provide link of working website. Maximum 255 characters.

Note: Ensure all details match your TAX ID/EIN information.

Provide Contact Information

1. Enter your business contact number.

Business contact number *

(000) 000-0000

2. Enter your support phone number:

Support phone number *

☐ Same as business number

(000) 000-0000

a. Select Same as business number if applicable

Or

b. Enter a different number.

3. Select the **Next** button in the bottom-right corner.

Next

Customer Consent

Provide details on how your business collects and manages customer consent for SMS messaging. This step ensures compliance with messaging regulations.

Review Required Disclosures

1. Review the required **SMS disclosure elements**, including:
 - Brand name
 - Messaging purpose
 - Message and data rate notices
 - Opt-in and opt-out instructions
 - Message frequency details
 - Privacy Policy and Terms & Conditions

Explain Customer Consent

2. Enter a description of **how customers provide consent** to receive messages.

Please explain how customer consent is obtained ⓘ

Explain customer consent *

Example: Customers initiate conversation after getting our number from our office/our site.

Minimum 40 characters

0 / 4,096

Example: Customers opt in through your website, forms, or by initiating contact

XBert Tip: Ensure your response meets the minimum (40) and maximum (4,096) character requirement.

Upload Supporting Documents

1. Select **Upload** to add documents that support your consent process (if applicable).
 - Up to 5 files
 - Maximum size: 10 MB per file
2. Confirm your files are uploaded successfully.

Provide necessary documents to support your explanation ⓘ

Upload documents

Supported formats ⓘ Maximum number of files: 5 Maximum file size: 10 Mb

Uploaded files: 0 out of 5  **Upload**

- a. Select the **Next** button in the bottom-right corner.

Next

Messaging Plan

Provide details on how you plan to use SMS messaging and the types of messages you will send.

1. Select how many phone numbers you will use for messaging.

How many phone numbers are you going to use for messaging?

- ☐ 40 numbers or less
- ☐ 41 numbers or more

2. Enter a description of **how you plan to use text messaging**.

Please explain how you plan to use text messaging ⓘ

Explain usage *

Example: Texting will be used to communicate with external users. This includes topics such as casual conversation, meetings. Customers initiate conversation after getting our number from our office/our site.

Minimum 40 characters

0 / 1,024

XBert Tips:

- Include details such as communication type, audience, and purpose
- Ensure your response meets the **minimum (40) and maximum (1,024) character requirement**.

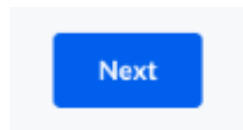
3. Select all applicable use cases for your messaging (maximum of 5), such as:

Which use case(s) match your text messaging activity?

Select all that applies (Maximum 5*). Hover for more info

- | | |
|--|--|
| ☐ 2FA | ☐ Higher Education |
| ☐ Account Notification | ☐ Marketing |
| ☐ Customer Care | ☐ Polling and voting |
| ☐ Delivery Notification | ☐ Public Service Announcement |
| ☐ Fraud Alert Messaging | ☐ Security Alert |

4. Review your selections before continuing.
5. Select the **Next** button in the bottom-right corner.



Customer Messaging Prompts

Provide the required messages customers will receive when they opt in, request help, or opt out of SMS messaging. These messages must include standard keywords such as **STOP**, **HELP**, and **START**.

Opt-in Confirmation

1. Enter the message customers receive after **opting in**.

Please provide the message customers receive after opting-in * ⓘ

You have successfully been subscribed to messages from <brandName> from this number. Message frequency may vary. Message and Data Rates may apply. Reply HELP for help. Reply STOP to unsubscribe.

Please include your brand name in the sample message.

194 / 1,024

2. Include your **brand name** in the message.

XBert Tips:

- Ensure your response meets the **maximum (1,024) character requirement**.
- Include your brand name in the message.
- Ensure the message includes required elements such as:
 - Subscription confirmation
 - Message frequency notice
 - “Message and data rates may apply”
 - Instructions for HELP and STOP

Support (HELP) Message

1. Enter the message customers receive when they request **support**.

Please provide the message customers receive as a reply to support command * ⓘ

For additional information please call <brandName> at <phone>. To opt-out, reply STOP.

Please include your brand name in the sample message.

86 / 1,024

2. Include instructions for opting out (e.g., reply STOP).

XBert Tips:

- Ensure your response meets the **maximum (1,024) character requirement**.
- Include your **brand name** and a **contact method** (such as a phone number).

Opt-Out Confirmation Message

1. Enter the message customers receive after **opting out**.

Please provide the message customers receive after opting out * ⓘ

You have successfully been unsubscribed to messages from <brandName> from this number. Reply START to subscribe again.

Please include your brand name in the sample message.

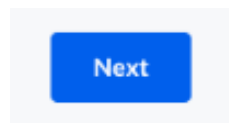
118 / 1,024

2. Include instructions for re-subscribing (e.g., reply START).

XBert Tips:

- Ensure your response meets the **maximum (1,024) character requirement**.
- Include your **brand name** and a **contact method** (such as a phone number).

3. Select the **Next** button in the bottom-right corner.



Message Content & Samples

Provide details about the types of content included in your messages and examples of what you will send to customers.

Select Message Content Types

1. Select all applicable content types included in your outgoing messages:

- **Embedded Links**
- **Embedded Phone Number**
- **Direct Lending or Loan Arrangement**
- **Age-Gated Content**

Choose the types of content that will be included in your outgoing messages

- ☐ **Embedded Links:** Indicates whether messages include embedded links of any kind. Note that public URL shorteners (bitly, tinyurl) are not accepted.
- ☐ **Embedded Phone Number:** Indicates whether messages include embedded phone numbers (except the required HELP information contact phone number).
- ☐ **Direct Lending or Loan Arrangement:** Indicates whether messages include agreements of loans or financing (including arranging third-party financing, loans, or mortgages) of any kind.
- ☐ **Age-Gated Content:** Indicates whether messages include any age-gated content as defined by Carrier and CTIA guidelines.

Provide Sample Messages

2. Enter at least **two sample messages** you plan to send to customers.

Please provide at least two sample messages you will send your customers, and you can include up to five sample messages ⓘ

Sample Message 1 *

Example: Thank you for contacting [Brand Name]. We will get back to you as soon as possible. Reply STOP to opt-out.

Minimum 20 characters

0 / 1,024

Sample Message 2 *

Example: It was nice talking with you the other day and thank you for reaching out. I'm excited to talk more about [Brand Name]. Reply STOP to opt-out.

Minimum 20 characters

0 / 1,024

3. Select **Add sample** to include up to five total messages (optional).

 **Add sample**

XBert Tips:

- Ensure each message meets the **minimum character requirement (1,024)**.
- Review your samples to confirm they reflect your actual messaging use.

4. Select the **Next** button in the bottom-right corner.

Next

Privacy Policy

Provide your privacy policy and confirm compliance with messaging requirements.

Privacy Policy

Share **privacy policy** (mandatory) and **terms and conditions** (optional)

Privacy policy should be easily located on your website. The privacy Policy must be clear that end user's personal info will not be shared or sold to third parties for the purpose of marketing. If social media website is used, privacy policy/terms and conditions can be pinned post.

Provide link

Privacy policy link

Please provide link from your website within 255 characters

Terms and conditions link

Maximum 255 characters

Or upload documents

Supported formats ⓘ Maximum number of files: 5 Maximum file size: 10 Mb

Uploaded files: 0 out of 5 [Upload](#)

Please confirm your compliance with mandatory messaging restrictions *

☐ I confirm that business messaging will not be used for Affiliate Marketing.

1. Enter your **privacy policy URL** (required).

Privacy policy link

Please provide link from your website within 255 characters

XBert Tip: The privacy policy must be accessible on your website.

2. Enter your **terms and conditions URL** (Optional).

Terms and conditions link

Maximum 255 characters

3. Select **Upload** to add supporting documents if needed.

Or upload documents

Supported formats ⓘ Maximum number of files: 5 Maximum file size: 10 Mb

Uploaded files: 0 out of 5  Upload

- Up to 5 files
 - Maximum size: 10 MB per file
4. Select the checkbox to confirm compliance with **mandatory messaging restrictions**.

Please confirm your compliance with mandatory messaging restrictions *

☐ I confirm that business messaging will not be used for Affiliate Marketing.

5. Select the **Submit** button in the bottom-right corner to complete the process.

Submit

Resuming 10DLC Registration

Why do I have to do this?

Due to recent [US phone carrier regulations](#), all businesses must register the phone numbers they use to send text messages. Registration is a quick, industry-wide effort to reduce spam and protect your customers.

What does this do?

This requirement is designed to add visibility around who is sending business texts and the types of messages being sent as part of an industry-wide effort to reduce spam and improve deliverability of legitimate text messages.

Visit [our website](#) to learn more and see FAQs.



Latest submission

Status:	Company type:	Edited by:	Last edited:
Ⓜ Incomplete	🏢 Private Company	ⓀⓌ Kelsi Wieler	05/01/2026

If you did not complete your 10DLC registration during onboarding, you can return and continue where you left off.

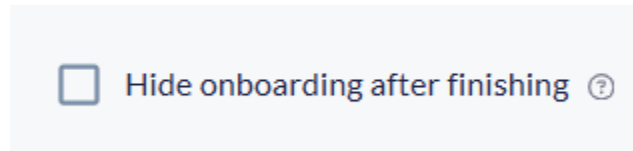
Select **Resume registration** to reopen your latest submission and complete any remaining steps. Your progress will be saved, allowing you to pick up without starting over.

[Resume registration](#)

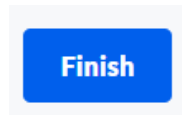
Setup Review

On the **Setup review** page, take a moment to review all your configuration details.

1. If you don't want onboarding steps to appear after you're finished, select the **Hide onboarding after finishing** checkbox in the bottom-right corner.



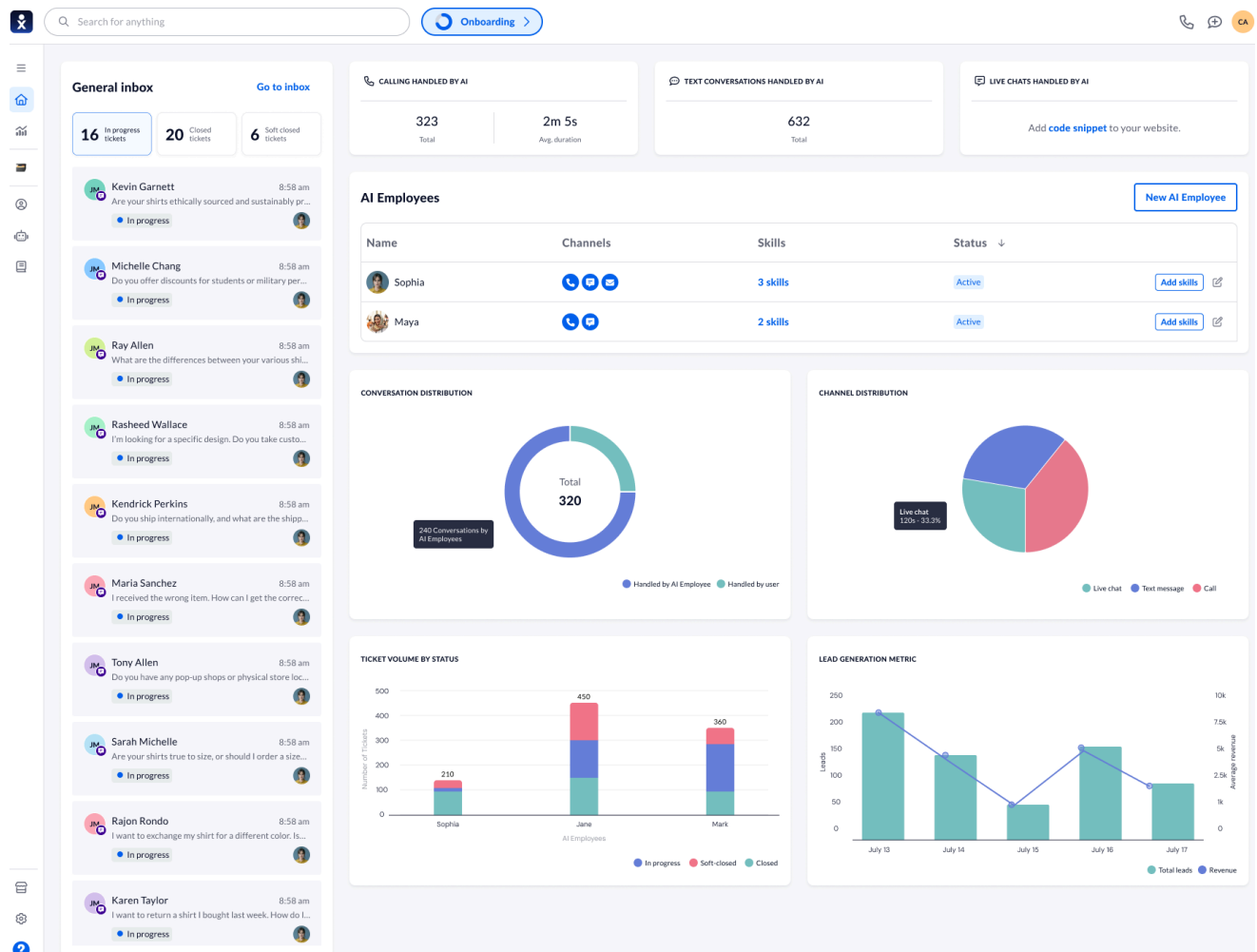
2. When everything looks good, select **Finish** in the bottom-right corner.



3. You've successfully completed advanced onboarding.

Getting Started with Your First AI Employee

After onboarding is complete, you are directed to the Home page. This is your central view for monitoring activity across your AI employees, channels (if you are using NEXT), and inboxes. From here, you can track conversations, review performance, and step in when needed.



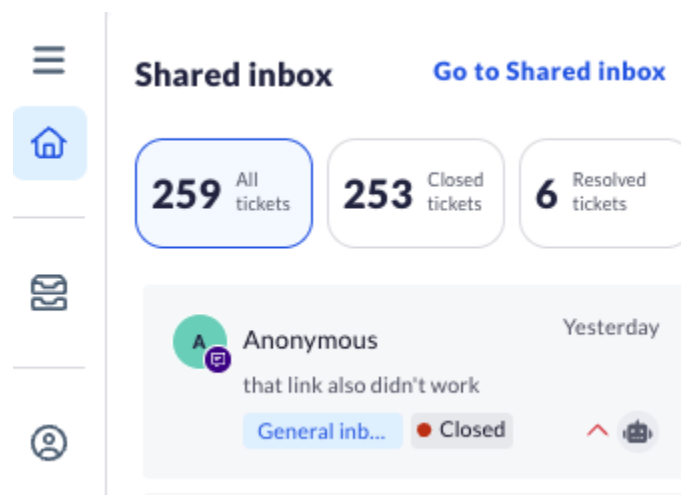
Inboxes

XBert uses a **Shared Inbox** to organize and manage all customer conversations. Within the Shared Inbox, you can access different inboxes (such as General or custom inboxes) to handle specific workflows.

The inbox is where you access and manage **tickets**, which represent individual customer conversations.

Each interaction—whether from chat, SMS, or calling—creates a **ticket** that appears in the inbox. Tickets allow you to track and manage every customer conversation in one place.

You can also quickly access the **Shared Inbox** and ticket metrics from the Home page.



When you hover over a closed inbox item, you can view the details quickly. Open the chat to see what the AI Employee said to the customer.

General Inbox



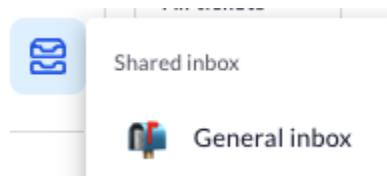
The **General Inbox** is the default view used for managing conversations.

Within this view, you can track tickets by status:

- **In progress** – Active conversations being handled
- **Soft closed** – Conversations marked closed but can reopen if the customer responds
- **Forwarded** – Conversations sent to an external number or destination

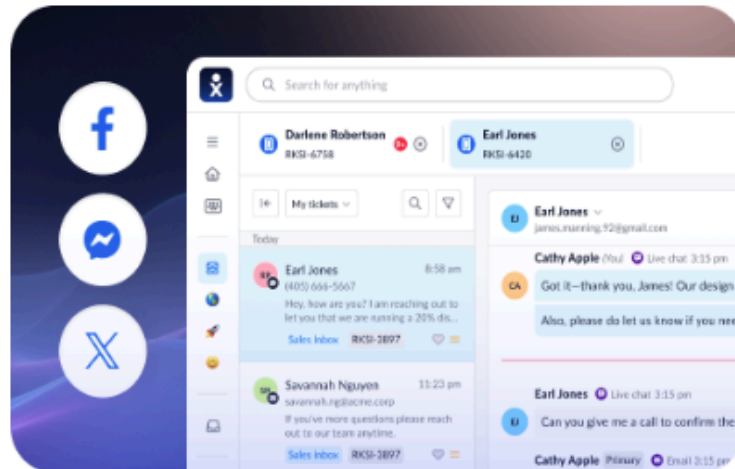
This view is used for **day-to-day conversation management**.

By selecting the **inbox** icon from the leftside menu, you can select the shared inbox and jump directly into managing tickets.



AI Employee Inbox Tour

When you first open the AI Employee inbox, a guided tour introduces key features to help you manage customer conversations.



AI Employee inbox

View all customer interactions

The AI Employee inbox pulls every customer interaction into one place, giving your team full visibility across connected channels including voice, text messaging, and live chat. [Learn more](#)

Remind me later

Start Tour

Start the Tour

1. When the tour appears, review the introduction to the **AI Employee inbox**.
 - a. Select **Start Tour** to begin

Start Tour

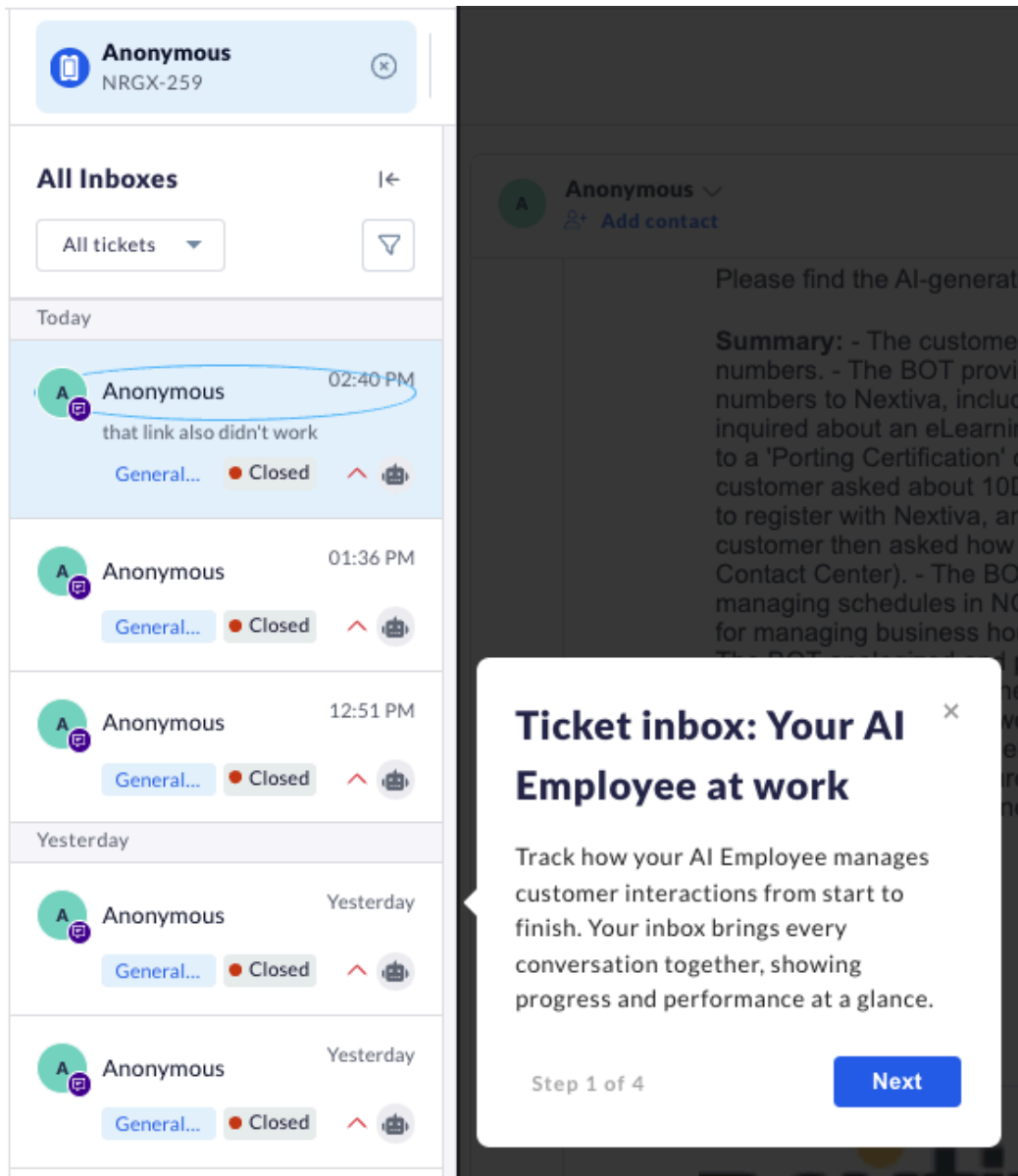
or

- b. **Remind me later** to skip

Remind me later

Step 1: Ticket Inbox Overview

Understand how conversations are organized.



1. Review how the **ticket inbox** brings all customer interactions into one place.
2. Select **Next** to continue.

Next

Step 2: View Conversations

See how conversations unfold in real time.

The screenshot displays the Nextiva AI Employee interface. On the left, a sidebar titled 'All Inboxes' shows a list of tickets. A modal window titled 'See AI Employee conversations unfold' is overlaid on the sidebar, providing instructions on how to view the full conversation thread. The main content area shows a detailed view of a conversation with an 'Anonymous' contact. The conversation includes a request for an AI-generated summary, a detailed summary of the interaction, a ticket number, and a closing message from Nextiva. The Nextiva logo and address are also visible at the bottom of the conversation view.

See AI Employee conversations unfold

View the full conversation thread between customers and your AI Employees in real-time. Review message quality, understand customer needs, and jump in to assist when your AI needs backup.

Step 2 of 4 [Next](#)

Anonymous 02:40 PM
that link also didn't work
General... Closed

Anonymous 01:36 PM

Please find the AI-generated summary of the recent customer interaction.

Summary: - The customer initiated a chat asking how to port their phone numbers. - The BOT provided a detailed step-by-step guide for porting numbers to Nextiva, including a link to a full guide. - The customer then inquired about an eLearning option for porting, and the BOT provided a link to a 'Porting Certification' course, clarifying it is free of cost. - Next, the customer asked about 10DLC, and the BOT explained what 10DLC is, how to register with Nextiva, and provided a link to a registration guide. - The customer then asked how to change business hours in NCC (Nextiva Contact Center). - The BOT provided steps and a link to a detailed guide on managing schedules in NCC. - The customer reported that the provided link for managing business hours in NCC resulted in a 'no article found' error. - The BOT apologized and provided alternative navigation steps and a link to 'NCC Video Guides' on the Academy site. - The customer stated that this second link also did not work. - The BOT apologized again for the non-working links, provided general steps to navigate the Nextiva Academy Home Page to find resources, and suggested contacting support at 800-285-7995 for live assistance.

Ticket: [NRGX-259](#)

Best regards,
Nextiva

nextiva

9451 East Via de Ventura,
Scottsdale, AZ 85258

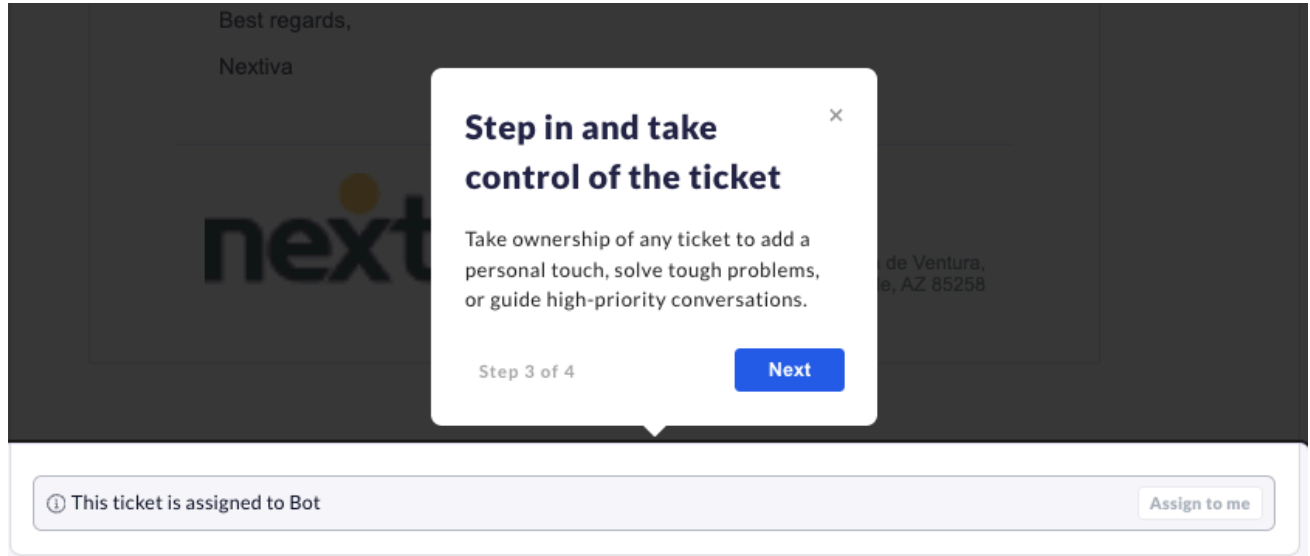
See 2 Updates

1. Review the **conversation thread** to see messages between the customer and AI Employee.
2. Monitor message flow, customer needs, and AI responses.
3. Select **Next** to continue.

[Next](#)

Step 3: See Ownership of a Ticket

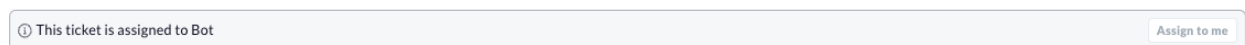
If you have NEXT features such as voice, SMS, chat, or Social, you can assign tickets to yourself and respond. This allows you to step in when needed.



1. Review how to **take ownership of a ticket**.
2. Use this when you want to assist, resolve complex issues, or handle priority conversations.
3. Select **Next** to continue.

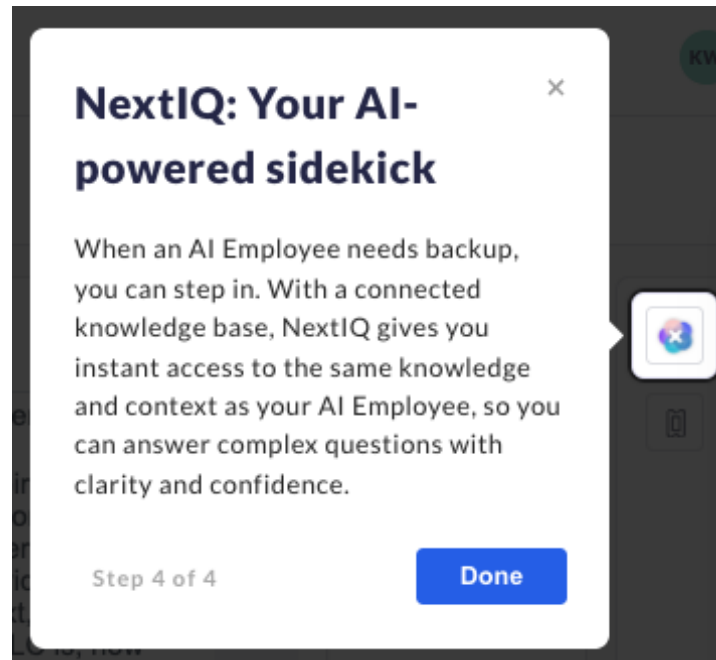


Since this is an XBert AI Employee account, you can see that the ticket is assigned to a Bot and has been resolved. You cannot take ownership of the ticket or respond to it.



Step 4: Use NextIQ

Leverage AI assistance during conversations.



1. Review how **NextIQ** provides knowledge and context to support responses.
2. Use it to answer complex questions with additional guidance.
3. Select **Done** to complete the tour.



Tickets

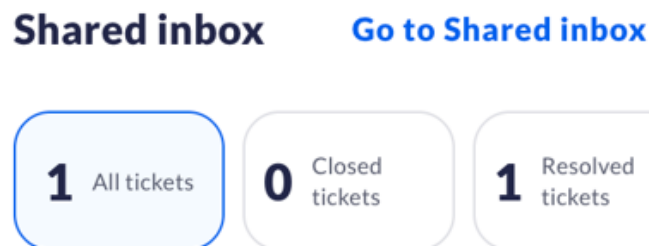
Tickets represent individual customer conversations across channels like SMS and live chat. Use tickets to track interactions, respond to customers, and manage conversations from start to resolution. This is your main workspace for monitoring and handling customer activity.

Ticket Status

Ticket status includes both a **summary view** and a **status dropdown** to help you monitor and manage conversations. The summary shows ticket counts at a glance, while the dropdown allows you to filter and view tickets by their current status.

Summary

View a quick summary of ticket counts by status at the top of the inbox.



- **All tickets** – Total number of conversations
- **Closed tickets** – Number of completed conversations
- **Resolved tickets** – Number of resolved conversations

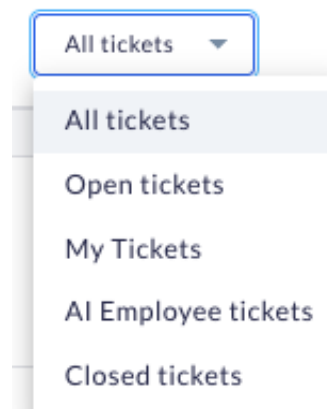
Select any status to filter the inbox and view those tickets.

XBert Tip: Use the ticket status summary to quickly understand ticket volume and navigate to specific groups of conversations.

Status Dropdown

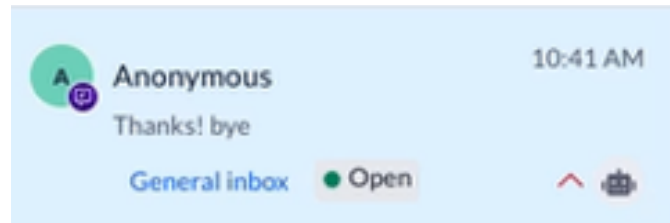
Use the **ticket status dropdown** to quickly switch between common views:

- **All tickets** – Displays all conversations
- **Open tickets** – Shows active, ongoing conversations
- **My tickets** – Shows tickets assigned to you
- **AI Employee tickets** – Shows tickets handled by AI Employees
- **Closed tickets** – Shows completed conversations

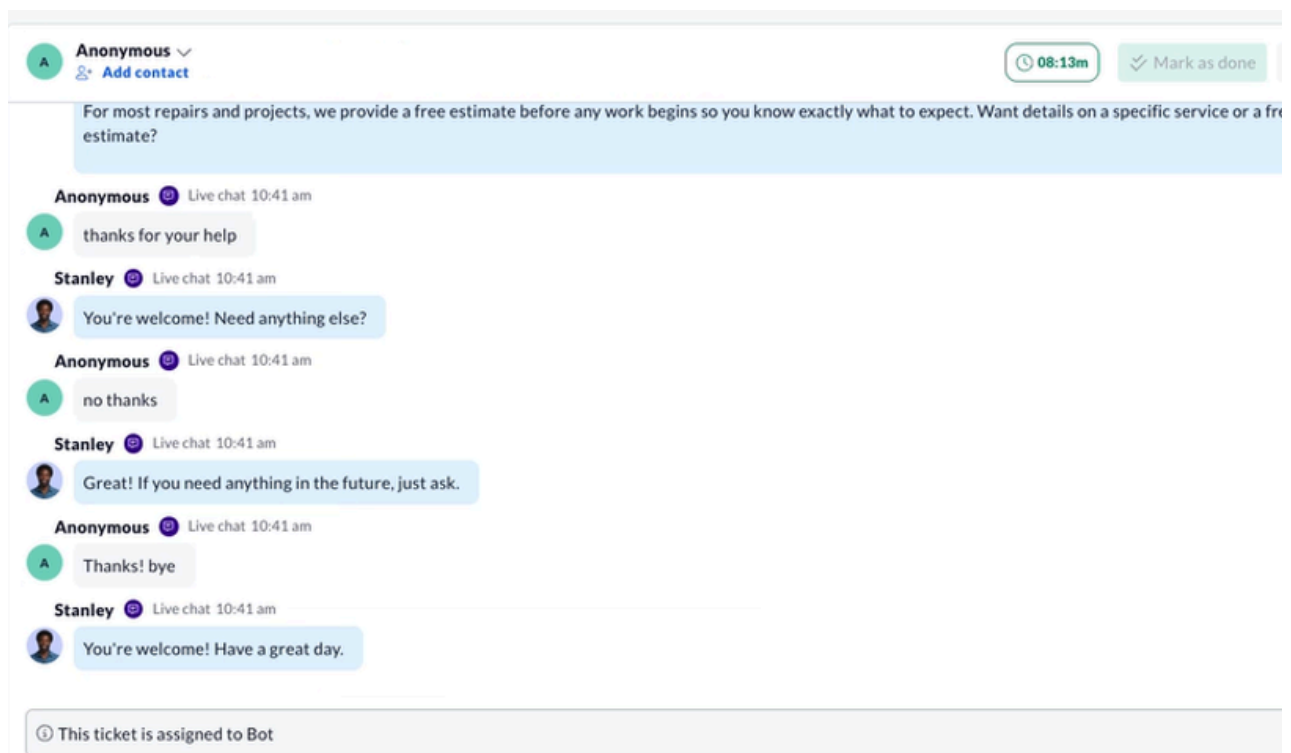


Viewing Tickets

1. From an inbox, select a **ticket** from the left-side column.



2. Review the ticket interaction details from the AI Employee.



3. Hover over a ticket to see the quick notes and status of the ticket. Each ticket represents one customer interaction, whether it came from chat, SMS, or a phone call.

Nextiva features and training inquiries

- Anonymous needed information regarding user setup in NEXT, training for agents, an XBert AI course, and the definition of NCC.
- Bertie provided detailed instructions for user setup, suggested specific training courses for agents and XBert AI, and explained what NCC is.
- Information provided, chat disconnected

Last Updated: 2 days ago

Ticket ID
NRGX-254

Channel
Live chat

From
Anonymous

Inbox
General inbox

Priority
High

Time To Resolution
May 01, 4:29 pm

Assignee
Bot

Status
Closed

First Response Time
Apr 30, 4:39 pm

A Anonymous

What is NCC?

General in... Closed

Thursday

4. You can also review the summarized notes from the interaction.

 **Conversation Summary**
To: kelsi.wieler@nextiva.com

Summarize 



Dear Administrator,

Please find the AI-generated summary of the recent customer interaction.

Summary: - The customer inquired about setting up a user in NEXT, training for agents on NEXT, courses for XBert AI, and the definition of NCC. - The bot provided detailed steps on how to add a user in the NEXT platform via the People & AI section in Administrator Settings, including required details like name, email, role, team, and licenses. - The bot offered two training resources for agents using the NEXT platform: 'Agent Certification for NEXT' and 'Agent Learning Path for NEXT Certification', both over 30 minutes in duration. - The bot recommended the 'XBert AI Pro' course for learning about XBert AI, detailing its curriculum, interactive simulations, and certification test. - The bot explained that NCC stands for Nextiva Contact Center, a cloud-based solution for managing customer interactions, highlighting its key features like intelligent routing, real-time monitoring, advanced reporting, and omnichannel support. - The chat session disconnected after the bot provided all the information.

Ticket:

Best regards,

Nextiva



9451 East Via de Ventura,
Scottsdale, AZ 85258

5. If a conversation needs attention, your team can follow up directly from the inbox using NEXT.

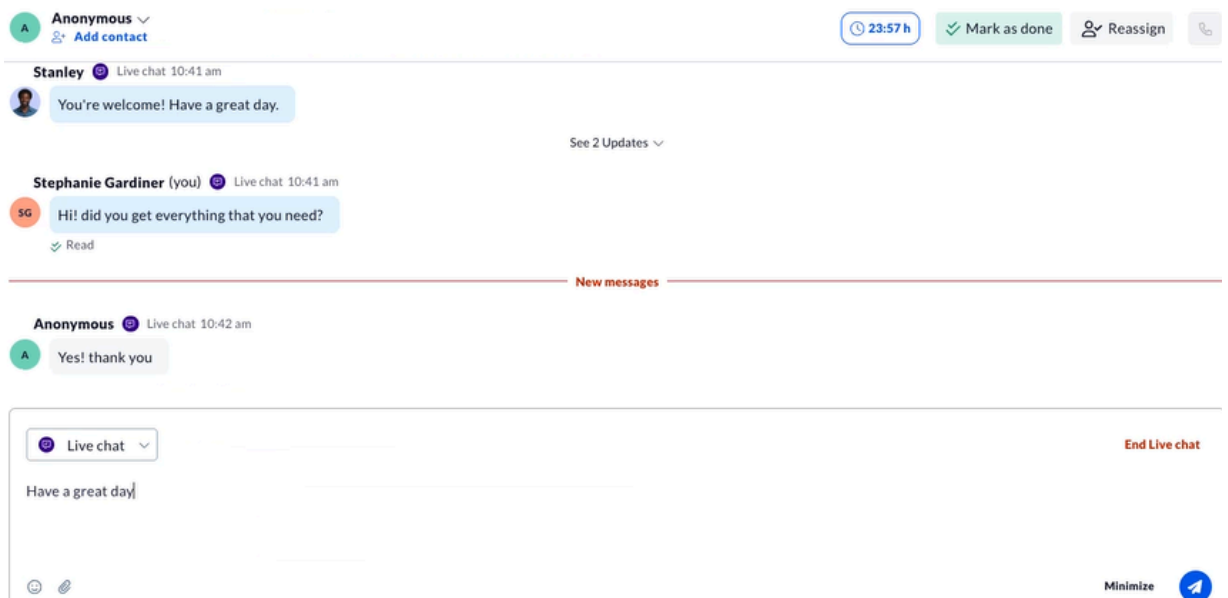
Assign Tickets

Assign a ticket to yourself to take control of the conversation and manage it directly.

1. Open an **SMS** or **Live Chat** ticket.
2. Select **Assign to me** at the bottom of the ticket.



3. Once the ticket is now assigned to you, you may start chatting with the customer using the **text box** at the bottom.



View and Update Ticket Information

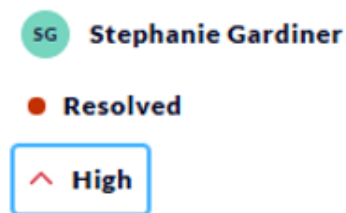
Access additional details and make updates to the ticket.

1. Select **Ticket Information** on the far-right side.



2. From the Ticket Information panel, update fields such as:

- **Assignee**
- **Ticket Status**
- **Priority**



Add Internal Notes

Add notes for internal tracking and collaboration.

6. In the **Internal Notes** section, select **Add note**.



7. Enter your note.
8. Save the note to attach it to the ticket.

XBert Tip: Internal notes are not visible to customers.

Inbox Filter

Use filters to narrow down and organize tickets in your inbox. Filter tickets by status, channel, assignee, and date to quickly find and manage conversations.

1. Select **Filters** to open the filter panel.



2. Select a **ticket status** (e.g., All tickets).

Ticket status

All tickets ▼

3. Select an **inbox** (e.g., General inbox).

Inbox

General inbox ▼

4. Select an **assignee** to view tickets assigned to a specific user.

Assignee

All assignees ▼

5. Select a **start date** and **end date** to define a time range.

Start date

Apr 01, 2026

End date

May 01, 2026

6. Select one or more **sources**.

Sources

- ☐ Call
- ☐ Chat
- ☐ SMS

7. Select how results are **sorted** (e.g., Modified On – Newest First).

Sort By

Modified On (Newest First) ▼

8. Select **Apply** to update the inbox view, or **Close** to exit without changes.

Apply

Contacts

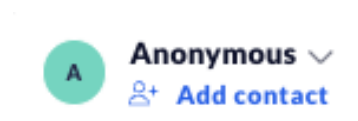
You can add a new contact or link a conversation to an existing contact for better tracking and personalization. Add and manage contact details to keep customer information organized and accessible across conversations.

Accessing Contacts

Access Contacts from either [Tickets](#) or the left-side [navigation toolbar](#).

From Tickets

1. Select **Add contact** from the conversation view.



2. Choose one of the following:



- a. **Add new contact**

or

- b. **Add to existing contact**

Add to Existing Contact

Link the conversation to a contact that already exists in your system.

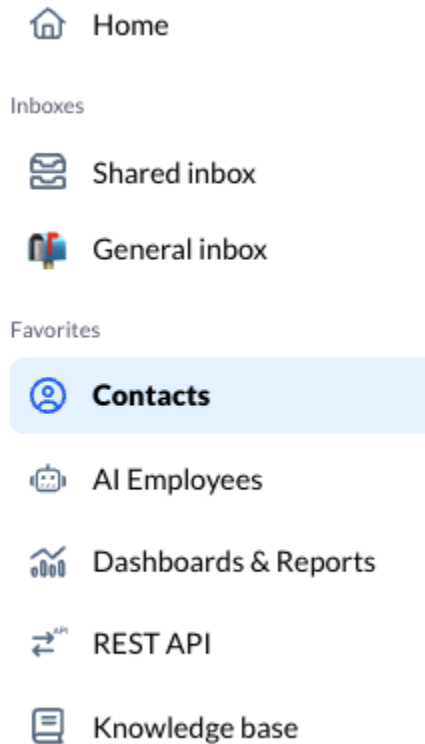
Contacts



1. Select **Add to existing contact**.
2. Enter a name in the **search bar** to find an existing contact.
3. Select the contact from the list.

Navigation Toolbar

Use the left-hand navigation toolbar to quickly access key areas of XBert, including inboxes, contacts, AI Employees, dashboards, and other tools needed to manage your account.

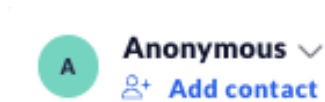


Add a Contact

You can add a new contact or link a conversation to an existing contact for better tracking and personalization. Add and manage contact details to keep customer information organized and accessible across conversations.

Ways to Add a Contact

3. Select **Add contact** from the conversation view.



4. Choose one of the following:

 Add new contact

 Add to existing contact

c. **Add new contact**

or

d. **Add to existing contact**

Adding new contact

Info Tab

Enter basic contact details.

Add contact



Info Company Social Links Addresses Permissions

1. Select **Upload Image** (optional).

a. Select the image from your computer.

Open

b. Select **Open**.

Upload Image

2. **Edit color** to customize the contact profile (optional).



3. Enter the contact's:

First Name

Enter first name

Last Name

Enter last name

Job Title

Enter job title

- **First name**
- **Last name**
- **Job title** (optional)

4. Select a **label** (optional).

Label

5. Add a phone number.

Phone Type

Phone Number

- Select the phone type from the drop-down menu.
- Enter a **phone number**
- Add additional phone numbers by selecting **Add phone**.

 **Add phone**

- Delete a phone number by selecting the **trash icon**.



6. Add an email address.

Email Type

Email

- Select the phone type from the drop-down menu.
- Enter a **phone number**
- Add additional phone numbers by selecting **Add phone**.

 **Add phone**

- Delete a phone number by selecting the **trash icon**.



Company Tab

Add company details associated with the contact.

1. Select a **company name** from the dropdown.

Company Name

2. Enter the **company website**.

Company Website

3. Enter a **company description** (optional).

Company Description

Social Links Tab (Optional)

Add social or messaging accounts.

1. Select a **social platform** and enter the account username.
2. (Optional) Select **Add social link** to include more profiles.
3. Add **IM accounts** if needed.

Addresses Tab (Optional)

Add physical address details.

Address Type	Timezone
Select address type	Select timezone
Address	
Enter address	
City	State
Enter city	Enter State
Zip	Country
Enter zip	Select Country

1. Select an **address type** and **timezone**.
2. Enter the contact's:
 - Address
 - City
 - State
 - ZIP code
 - Country
3. Select **Add address** to include additional locations (optional).

 **Add address**

Permissions Tab

Control who can view the contact.

Permissions

- ☒ **Public**
All users of the system can see the contact.
- ☐ **Private**
Only the user that added the contact can see the contact.

1. Select **Public** to make the contact visible to all users.
2. Select **Private** to restrict visibility to only you.

XBert Tip: Public contacts are visible to teammates and this action cannot be undone.

Save the Contact

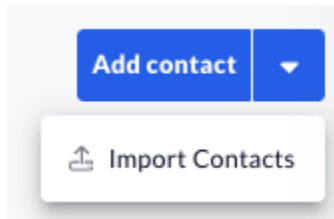
Select **Add** to save the contact, or **Cancel** to discard changes.



Import Contacts

Import contacts into XBert by uploading a CSV file or connecting external accounts such as Google Contacts or Microsoft 365.

1. From contacts, select the blue **down arrow** next to Add contact.



2. Select **Import contacts**, then select how you wish to import.

Import contacts

Connect accounts or import contacts from a CSV



Import from CSV file

[Download template](#)

Import



Google Contacts

Sign in to your Google account to import contacts

Connect



Microsoft 365 Contacts

Sign in to your Microsoft account to import contacts

Connect

Import from CSV File

Import contacts into XBert by uploading a CSV file or connecting external accounts such as Google Contacts or Microsoft 365.

1. Select Import.



Import from CSV file

[Download template](#)

Import

2. Draft and drop, or choose a file from your computer to upload.



Import your contacts to Nextiva

Quickly import large amounts of contacts to Nextiva by uploading a CSV file.



Drag and drop your file here or [choose a file](#) to upload

[Download our spreadsheet template](#)

3. Select **Open**.

4. Select **Next**.

CSV Template

1. Select **Download our spreadsheet template**.

[Download our spreadsheet template](#)

2. Complete a row for each contact.
3. Save the spreadsheet.
4. **Draft and drop**, or **choose the file from your computer to upload**.



Drag and drop your file here or [choose a file](#) to upload

5. Select **Open**.
6. Select **Next**.

Import Google Contacts

Connect your Google account to import contacts into XBert. New contacts added in Google will sync automatically.



Google Contacts

Sign in to your Google account to import contacts

Connect

Connect Google Contacts

1. Select **Google Contacts** from the import options.



Import Google Contacts to Nextiva

New contacts added in Google are imported to Nextiva automatically.

Click [Next](#) to continue

2. Select Next.

Next

3. Select **Import Contacts**.

Import private business contacts



Your contacts are kept private unless you decide to share them.



All contacts from your Google account will be imported to Nextiva. These contacts will be private and only visible to you.

Cancel

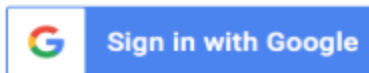
Import Contacts

4. Sign in to your **Google account**.

← Import Google contacts



Sign in to continue



XBert Tip: Imported contacts are private by default and only visible to you unless shared.

Import Microsoft 365 Contacts

Connect your Microsoft 365 account to import contacts into XBert. New contacts added in Microsoft 365 will sync automatically.



Microsoft 365 Contacts

Sign in to your Microsoft account to import contacts

Connect

Connect Google Contacts

1. Select **Microsoft 365 Contacts** from the import options.



Import Microsoft 365 contacts to Nextiva

New contacts added in Microsoft 365 are imported to Nextiva automatically.

Click [Next](#) to continue

2. Select Next.

Next

3. Select **Import Contacts**.

Import private business contacts



Your contacts are kept private unless you decide to share them.



All contacts from your Microsoft 365 will be imported to Nextiva. These contacts will be private and only visible to you.

Cancel

Import Contacts

4. Sign in to your **Microsoft 365 account**.

← Import Microsoft 365 contacts



Sign in to continue



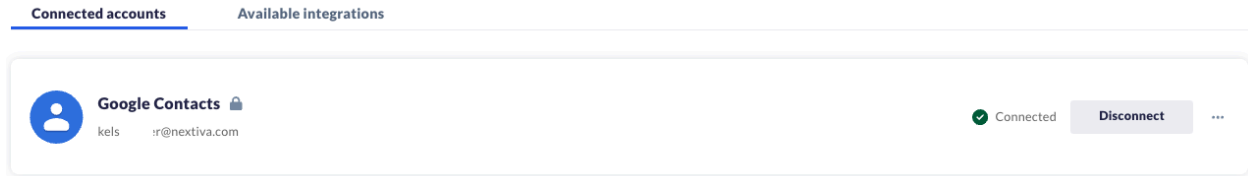
Sign in with Microsoft

Cancel

XBert Tip: Imported contacts are private by default and only visible to you unless shared.

Manage Connected Account

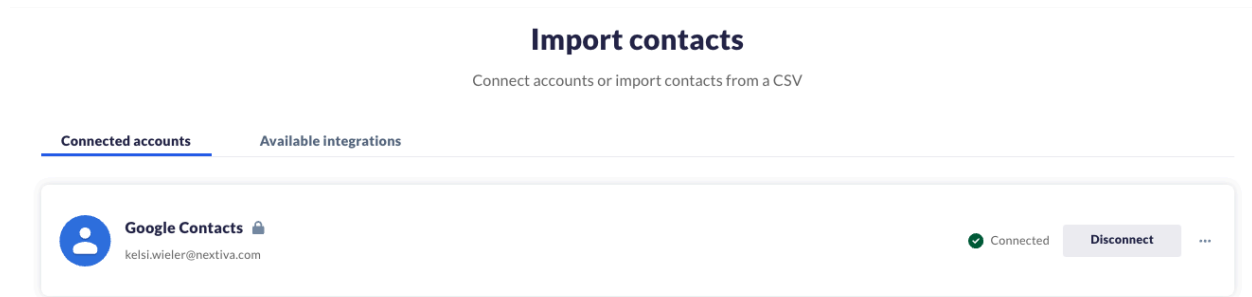
1. After connecting, view your account under **Connected accounts**.



2. Confirm the status shows **Connected**.



Disconnect a Connected Account



1. From Connected Accounts under Import Contacts, select the account to disconnect.
2. Select **Disconnect** to remove the integration.

Disconnect

3. Select **No, delete imported private contacts from Nextiva.**

This will disconnect your account. Would you like to keep the imported contacts in Nextiva?

- ☐ **Yes, keep imported contacts in Nextiva**
New contacts will no longer sync, however contacts you have already imported will still appear in your contact lists.
- ☒ **No, delete imported private contacts from Nextiva**
This will remove imported private contacts from your contact lists.

4. Select Disconnect.

Disconnect

Editing a Contact

1. To edit a contact, select the **Pencil icon** to the right of the contact.



2. Make changes to the contact.
3. Select **Save** to save changes.

Save

Deleting a Contact

1. Locate the contact you wish to delete.
2. Select the **Trash** icon to the right of the contact.



3. Select **Delete**.

Delete contact

This will permanently delete the contact.

Cancel

Delete

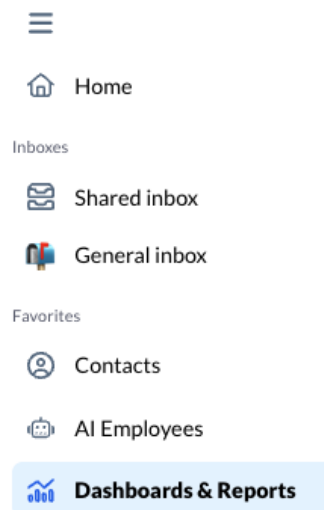
Dashboards & Reports

The **Dashboard** provides an overview of how your AI Employees are performing across channels. It includes key metrics to help you track performance and customer interaction trends.

You can filter data by **date range, inbox, and ticket status** to focus on specific insights.

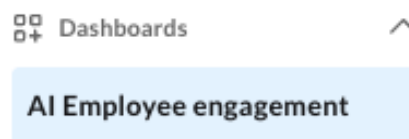
Accessing Dashboards

1. After logging into your XBert AI account,
2. Select **Dashboards & Reports** from the icons menu.



View a Dashboard

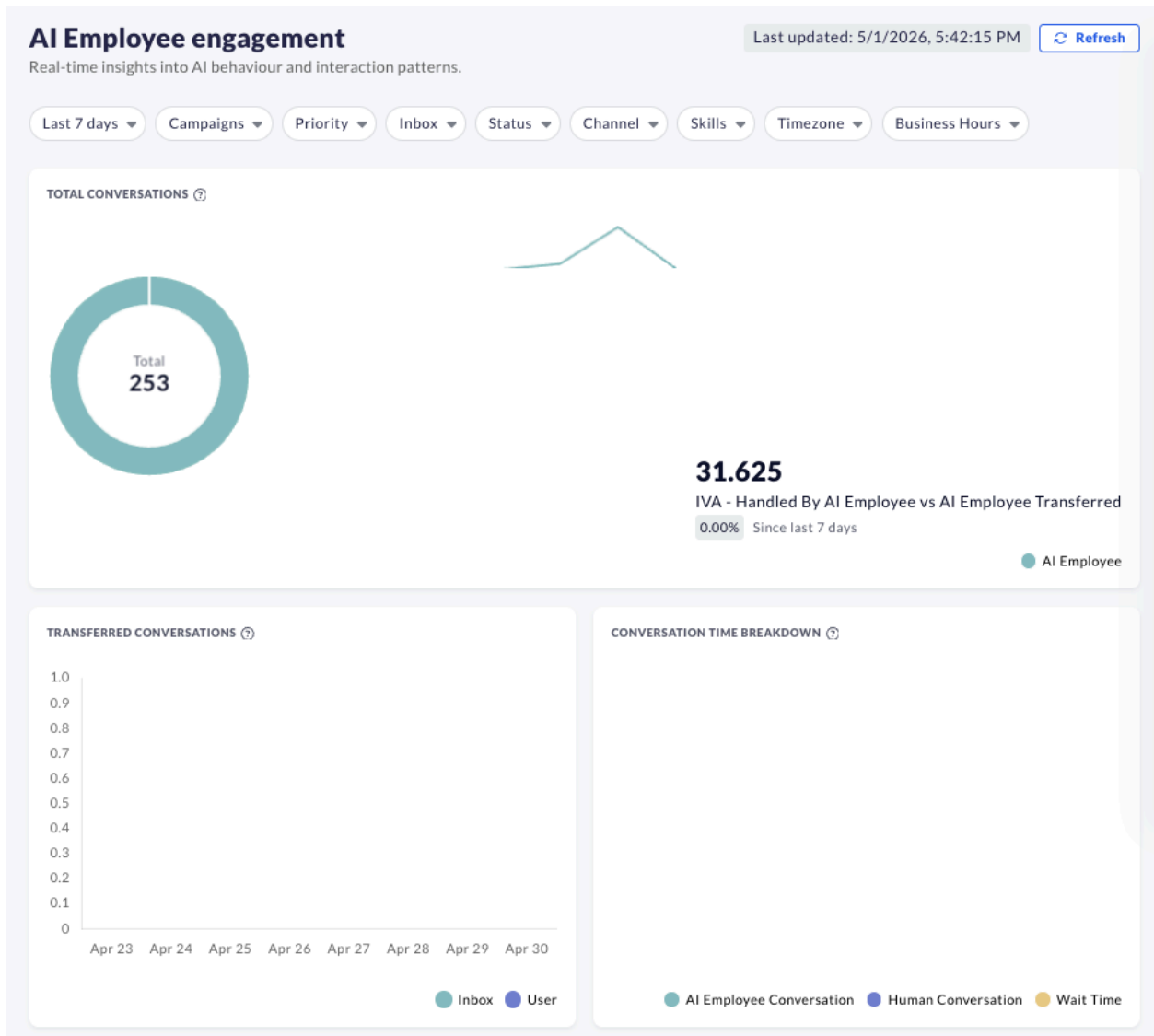
1. Open the **Dashboard** menu.



2. Select your desired dashboard.

AI Employee Engagement Dashboard

The **AI Employee Engagement Dashboard** provides real-time insights into how your AI Employees are handling conversations and interacting with customers.



Total Conversations

Represents every call or chat handled by the AI Employee within the selected time range, including conversations fully handled by AI and those transferred to a user or inbox.

Displays the total volume of conversations, along with a breakdown of **AI-only vs transferred**, shown as a donut chart and trend line.



Transferred Conversations

Shows the number of conversations routed from the AI Employee to a user or inbox over time.

Includes conversations automatically directed to the most relevant inbox or escalated to a human based on the customer's request.



Conversation Time Breakdown

Shows the average time a customer spends in a conversation from start to finish, including AI interaction, human interaction, and wait time.

Displayed as a pie chart with time split between AI Employee conversation, human conversation, and wait time.

CONVERSATION TIME BREAKDOWN ?



● AI Employee Conversation ● Human Conversation ● Wait Time

AI Employee Participation %

Shows how often each AI Employee participates in conversations, based on the percentage of sessions where that AI Employee had at least one turn.

Includes a trend line to show changes over the selected date range. Because multiple AI Employees can participate in the same conversation, combined percentages may exceed 100%.

AI EMPLOYEE PARTICIPATION % ?



37.5%

Agent usage rate

0.00% Since last 7 days

Functions Used by AI Employees

Shows how often each [function](#) is executed by AI Employees.

Displayed as a table with the number of executions and execution percentage for each function.

FUNCTIONS USED BY AI EMPLOYEES ?

Name	Executions	Execution Percentage
Retrieval	20	83.33
Terminate	4	16.67

New Leads Captured

Shows the total number of unique leads captured by the AI Employee during the selected date range.

Represents potential new customers collected through conversations, ready for follow-up.

NEW LEADS CAPTURED ?

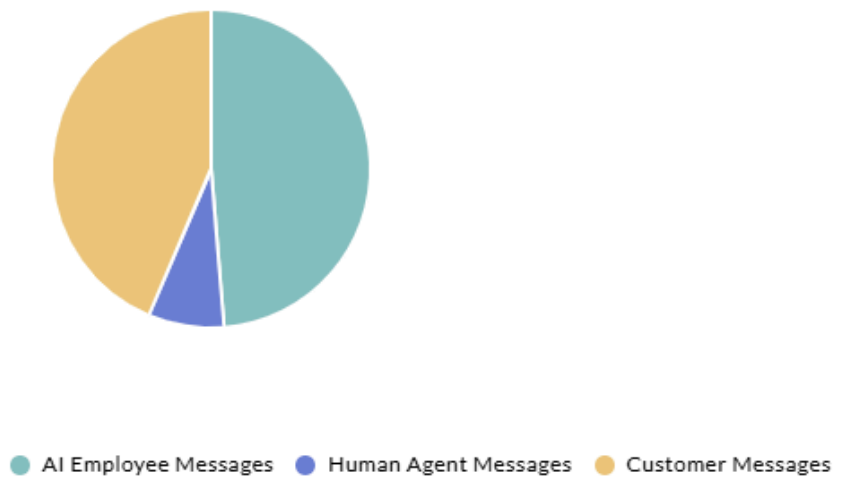


Average Number of Messages Across Sessions

Shows how messages are distributed within conversations across customers, AI Employees, and human agents.

Displayed as a pie chart with segments for **Customer Messages**, **AI Employee Messages**, and **Human Agent Messages**.

AVERAGE NUMBER OF MESSAGES ACROSS SESSIONS ⓘ



Optional Sections

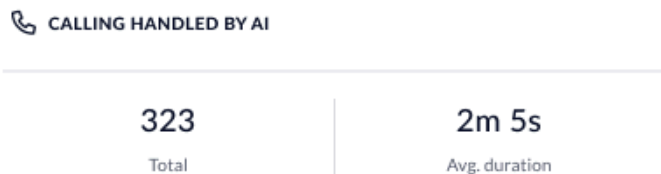
These sections provide additional insights depending on your enabled channels and configuration.



Calling

Displays calling activity handled by your AI Employee, including:

- Total number of calls
- Average call duration



SMS

Shows the total number of SMS messages handled by your AI Employee.



Live Chat

Shows the total number of live chat conversations handled by your AI Employee.

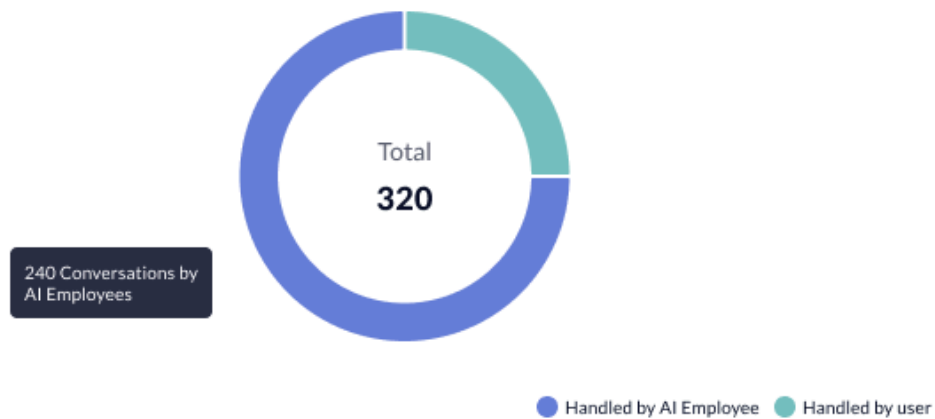
 LIVE CHATS HANDLED BY AI

Add [code snippet](#) to your website.

Conversation Distribution

Displays the total number of conversations handled and how many were escalated to a live user.

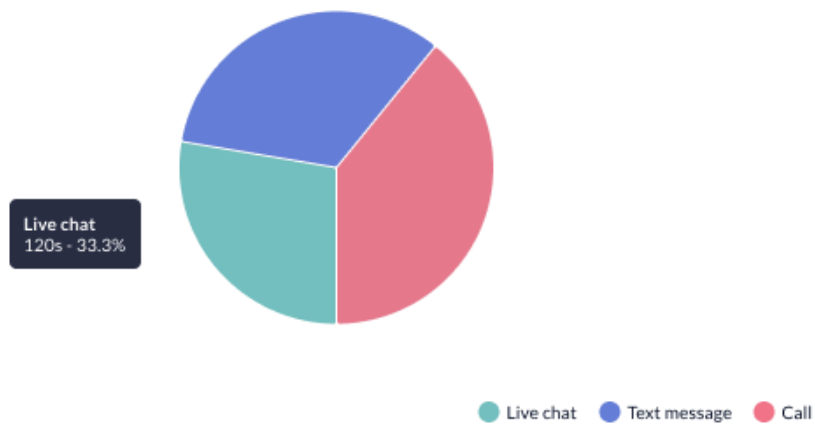
CONVERSATION DISTRIBUTION



Channel Distribution

Shows how customer interactions are distributed across channels such as calling, SMS, and live chat.

CHANNEL DISTRIBUTION

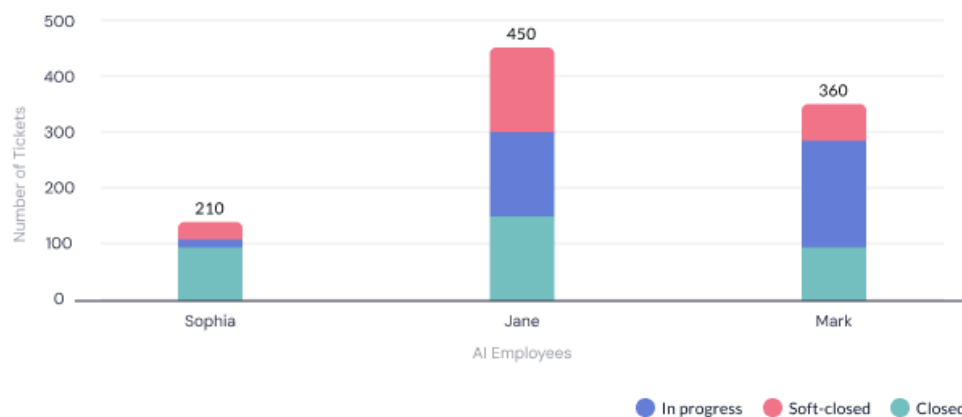


Ticket Volume by Status

Displays the number of tickets by status:

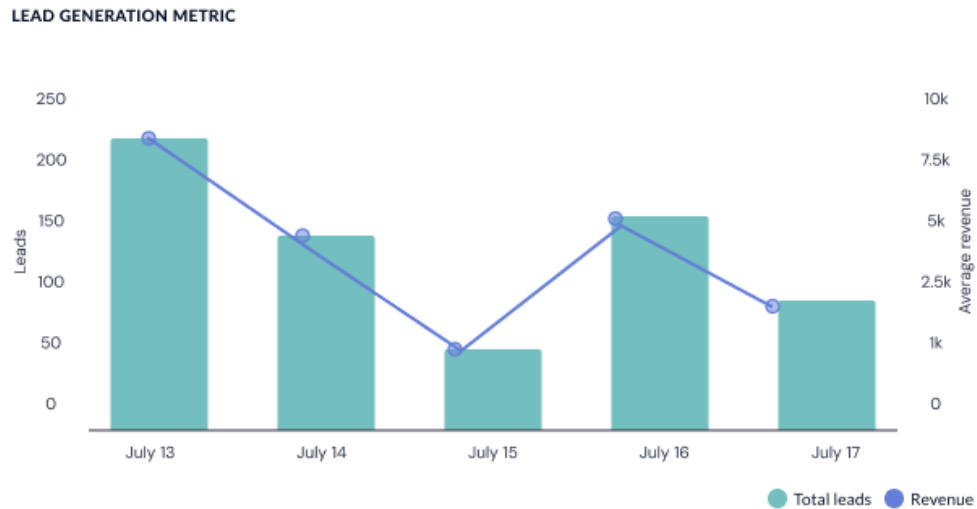
- In progress
- Soft closed
- Forwarded

TICKET VOLUME BY STATUS



Lead Generation Metrics

Shows the number of leads generated by your AI Employee.



XBert Tip: Any channel that isn't connected to your AI Employee will display **No data found**. You can connect a channel at any time to begin tracking metrics.

Filter

Filter by Date Range

1. Select the **date range dropdown** from the top menu bar.



2. Select your **desired date range**.

- ☐ Last 30 days
- ☐ Last 3 days
- ☒ Last 7 days
- ☐ Last Month
- ☐ Last Week
- ☐ This Month
- ☐ This Week
- ☐ Today
- ☐ Yesterday

Date Range

3. For more filters, select **View All** to be directed to the Dashboards page.

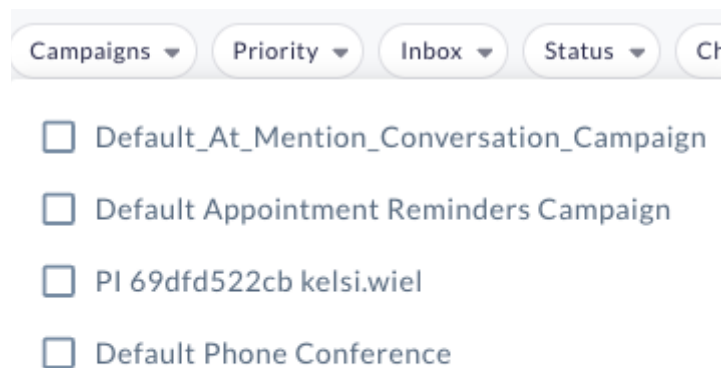
Filter by Campaign

Use the **Campaigns** filter to view metrics for specific campaigns.

1. Select the **Campaigns** dropdown.



2. Select one or more campaigns from the list.
3. Apply your selection to update the dashboard view.

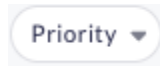


Priority Filter

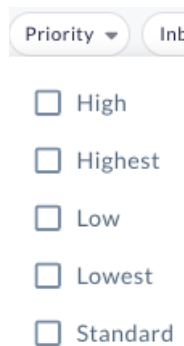
Use the **Priority** filter to view conversations based on their assigned priority level.

XBert Tip: Filter conversations by priority to focus on high-impact or time-sensitive interactions.

1. Select the **Priority** dropdown.



2. Select one or more priority levels:

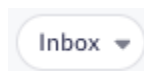


3. Apply your selection to update the dashboard view.

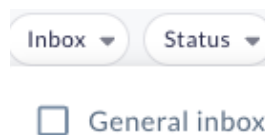
Inbox Filter

Use the **Inbox** filter to view conversations from a specific inbox.

1. Select the **Inbox** dropdown.



2. Select one or more inboxes (e.g., General inbox).



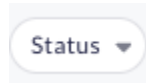
3. Apply your selection to update the dashboard view.

Status

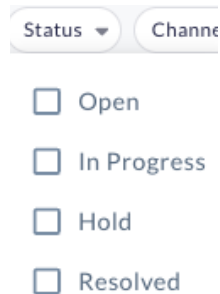
Use the **Status** filter to view conversations based on their current status.

XBert Tip: Filter conversations by status to track progress and focus on specific stages of the customer journey.

1. Select the **Status** dropdown.



2. Select one or more statuses:



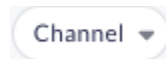
3. Apply your selection to update the dashboard view.

Channel Filter

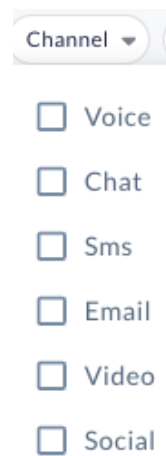
Use the Channel filter to view conversations by communication type.

XBert Tip: Filter conversations by channel to analyze how customers are engaging across different communication methods.

1. Select the **Channel** dropdown.



2. Select one or more channels:



3. Apply your selection to update the dashboard view.

Skills Filter

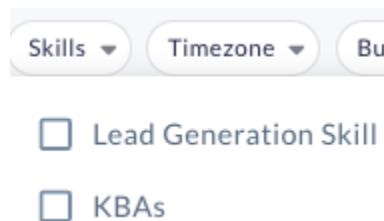
Use the **Skills** filter to view conversations handled by specific AI skills.

XBert Tip: Filter conversations by skill to analyze how specific AI capabilities are performing.

1. Select the **Skills** dropdown.



2. Select one or more skills (e.g., Lead Generation Skill).



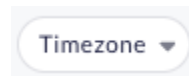
3. Apply your selection to update the dashboard view.

Timezone Filter

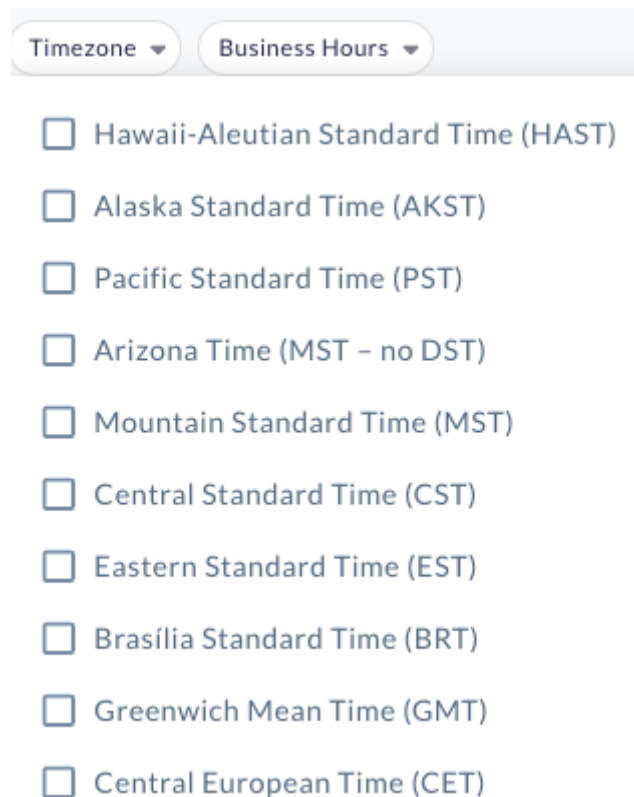
Use the **Timezone** filter to view conversations based on the selected time zone.

XBert Tip: Filter conversations by timezone to analyze activity across different regions.

1. Select the **Timezone** dropdown.



2. Select one or more time zones (e.g., PST, MST, CST, EST).



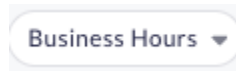
3. Apply your selection to update the dashboard view.

Business Hours Filter

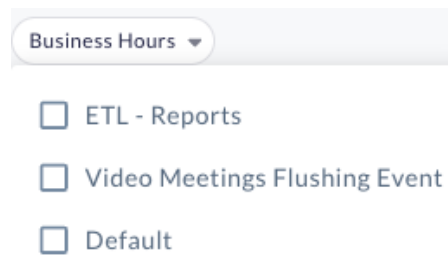
Use the **Business Hours** filter to view conversations based on configured schedules.

XBert Tip: Filter conversations by business hours to analyze activity during specific operating schedules.

1. Select the **Business Hours** dropdown.



2. Select one or more business hour sets (e.g., Default, ETL – Reports).



3. Apply your selection to update the dashboard view.

AI Employee Report

AI Employee Report

The **AI Employee Report** tracks how customers interact with your AI Employee across channels such as **Live Chat, SMS, and Voice**.

It includes metrics like:

- Session duration
- Channel distribution
- Escalation rate
- AI-to-agent ratio

Data updates every **15 minutes** and can be filtered by **date range, agent, or inbox**.

Accessing AI Employee Report

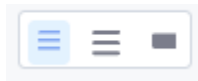
From **Dashboards & Reports** from the icons menu, open the **Reprts menu**.



Change View Density

Adjust how information is displayed in the table. Switch between view options to control how much data is visible on the screen.

1. Select the **view icon**.



2. Choose between:

- **Compact** – Displays more rows with less spacing
- **Standard** – Default view
- **Spacious** – Displays fewer rows with more spacing

Report Data Fields

This report provides a **session-level breakdown** of customer interactions handled by your AI Employee. Each row represents a single conversation (session), with detailed metrics across channels, timing, performance, and outcomes.

Date +	Customer ID +	Customer Contact +	Channel Address +	Session Channel +	Campaign +	Session ID +	Session Start Time +	Session End Time +	Session Duration +
05/01/2026		73a508-56c1-65cd-32dc-612d4f857ba	69f268a69721a4803a1720c8	Chat	Default	57df7501-046e-4669-bcae-9fbeca888fc4	05/01/2026 10:05:41	05/01/2026 10:36:04	00:30:23
05/01/2026		f34375c-c61-72f0-c0fa-8b3e243b313	69f268a69721a4803a1720c8	Chat	Default	9735fbd1-c1cc-48d5-b7a6-706f82dc5eae	05/01/2026 09:21:12	05/01/2026 09:51:22	00:30:10
04/30/2026		b1504a-f51d-6110-2644-72fc1d53e876	69f268a69721a4803a1720c8	Chat	Default	cc54e9a2-5694-41e2-b827-49dc0afeec08	04/30/2026 15:05:13	04/30/2026 15:35:34	00:30:21

Session Details

Basic information about each conversation:

- **Date** – When the session occurred
- **Customer ID** – Unique identifier for the customer
- **Customer Contact** – Contact identifier (e.g., phone or chat ID)
- **Channel Address** – Address used for the interaction (e.g., phone number or chat ID)
- **Session Channel** – Channel used (Chat, SMS, Voice)
- **Campaign** – Associated campaign (if applicable)
- **Session ID** – Unique identifier for the session

Timing Metrics

Tracks how long conversations last and how time is spent:

- **Session Start Time / End Time** – Start and end of the interaction
- **Session Duration** – Total time of the session
- **AI Employee Conversation Duration** – Time handled by AI
- **Human Conversation Duration** – Time handled by a human (if escalated)
- **Time to Transfer** – Time before the conversation was escalated

Conversation Handling

Shows how the AI managed the interaction:

- **Transferred To** – Indicates if the session was escalated and where
- **Ticket ID** – Associated ticket number
- **Ticket Status** – Final status (e.g., Closed)
- **AI Employee Skills Used** – Skills applied during the session

AI Activity & Functions

Details how the AI executed tasks:

- **Functions Used** – Whether functions were triggered
- **Total Function Calls** – Number of function executions
- **Successful Function Calls / Failed Function Calls** – Execution outcomes
- **Failed Function Calls – Used** – Failures that impacted the session
- **Total KB Calls** – Knowledge base lookups performed

Conversation Outcomes

Indicates how the interaction concluded:

- **Call Completion Status** – Outcome of the session (e.g., Workflow)
- **OTP Authentication** – Whether authentication was used
- **Lead Generated** – Whether the interaction resulted in a lead

Message Volume

Breakdown of messages exchanged during the session:

- **# of Agent Messages** – Messages sent by human agents
- **# of Customer Messages** – Messages sent by the customer
- **# of Bot Messages** – Messages sent by the AI EmployeeSMS-Specific Metrics

If SMS is used:

- **# of Agent SMS Messages**
- **# of Customer SMS Messages**
- **# of Bot SMS Messages**

Report Builder

Use the **Report Builder** to create custom reports based on predefined templates. Create custom reports using predefined templates to analyze performance across inboxes, users, and time periods.

Creating a Custom Report

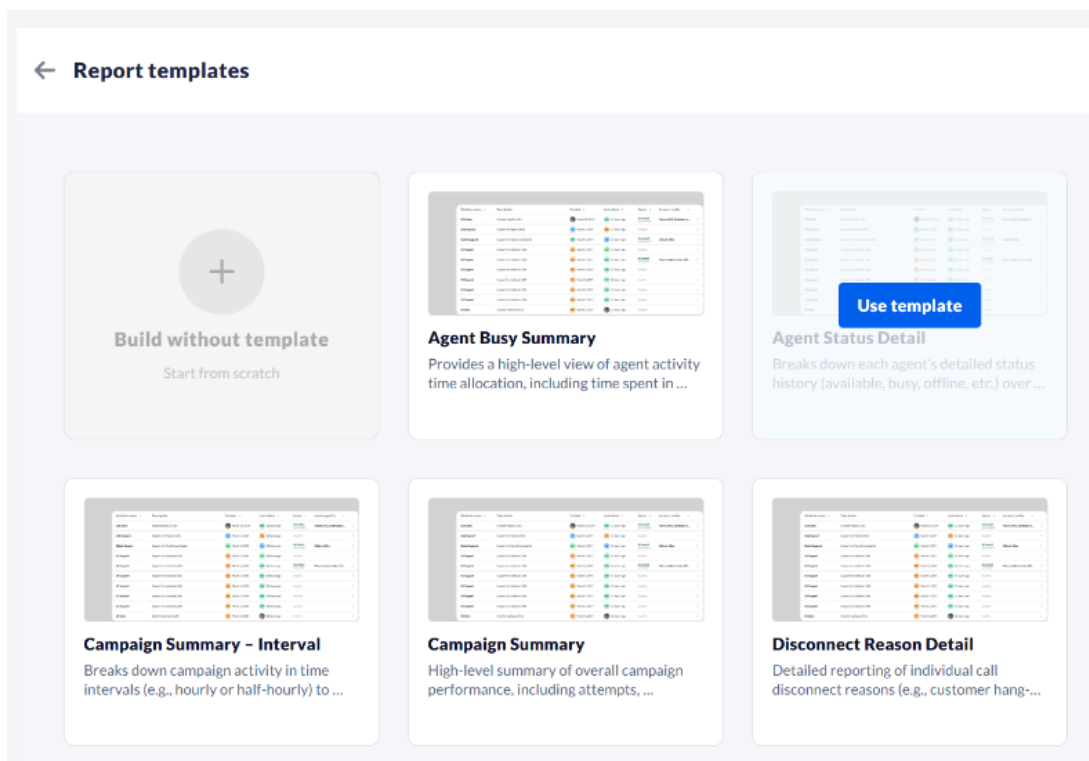
1. Select the **Report Builder** from the left-side menu.



2. Select **Create custom report**.

Create custom report

3. Choose a **template** (e.g., AI Employee Report, Agent Productivity Report). Building a report without a template is currently not available.



4. Enter a **report name**.

Name *

5. (Optional) Enter a **description**.

Description

6. Select a **time period**.

Time Period *

Today ▼

7. Select a **timezone**.

Timezone *

America/Phoenix - (GMT-07:00) ▼

8. Select one or more **inboxes**.

Inboxes *

☒ Select All

☒ General inbox

9. Select one or more **users**.



Select All



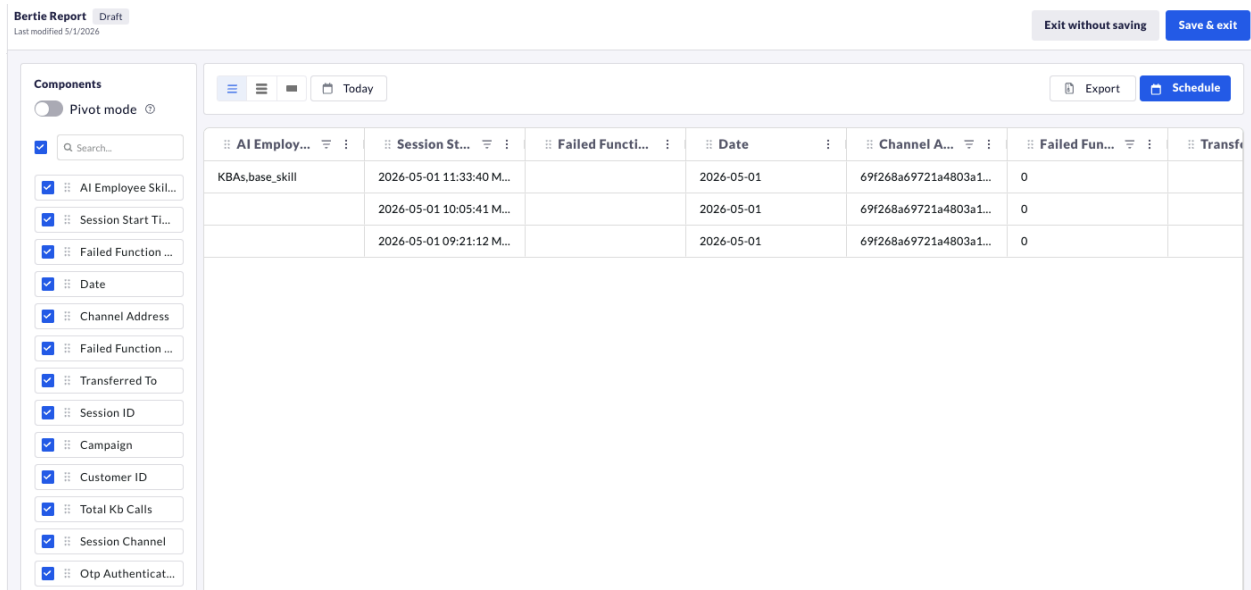
Kelsi Wieler

10. Select **Next** to continue.

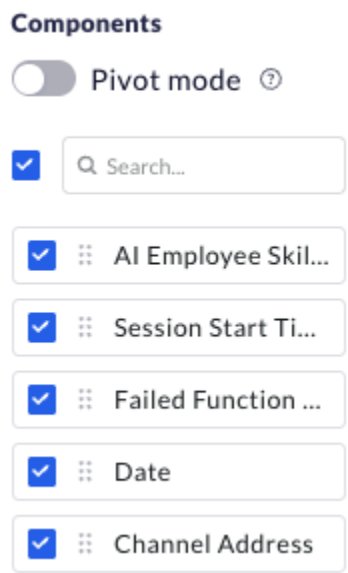
Next

Configure Report Layout

Customize your report by selecting and arranging the data fields you want to display.



- 1. Use the Components panel on the left to view available data fields.



- 2. Drag and drop fields into the report workspace using the drag handle.



Reorder Columns

Reorder columns to organize your report layout and prioritize key data fields.

1. Select and hold the **drag handle** (⋮) next to a field or column.



2. Drag it to the desired position between columns.
3. Release to place the column in the new location.

Date Selector

Use the date range selector to control the time period for your report data.

1. Select the **date dropdown** (e.g., Today).
2. Choose a predefined range:



XBert Tip: If the data does not appear right away, check the date range button and select a new range of time.

Custom Date Range

Use a custom date range to analyze data for a specific time period.

1. Select **Custom date range** from the date dropdown.
2. Use the calendar to select a **start date** and **end date**

<

April 2026

May 2026

>

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

3. Use quick options such as Today, Last month, or Last year

Jump to

Today

Last month

Last year

Or

4. Enter dates manually in the date fields.

MM/DD/YY

to

MM/DD/YY

Cancel

Save

5. Select **Save** to apply the range, or **Cancel** to exit.

Cancel

Save

Schedule a Report

Schedule reports to run automatically and deliver results to selected recipients at defined intervals.

 **Schedule**

1. Enter a **schedule name**.

Schedule *

2. Select a **recurrence** (e.g., daily, weekly).

Recurrence *

3. Select the **days of the week** you want to receive the report.

Day *

4. Select the **reporting time** (in 15-minute increments).

Time

5. Select a **Send From email address**.

Send From Email Address *

Xbert Tip: Send from email address may be locked.

6. Enter an **email subject**.

Email Subject *

7. Select one or more **recipients**.

Recipients *

Advanced Delivery Options

Configure how your report will be exported.

1. Select **Show advanced options**.

[Show advanced options](#)

2. Enter an **export filename**.

Export filename

IVARreport

3. Select the **export format** (e.g., .csv).

Export format

.CSV

4. Select a **CSV separator** (e.g., comma).

CSV separator

Comma

5. Select **Save & Finish** to apply your settings, or **Cancel** to exit.



Saving the Report

To save the report, select **Save & Exit** in the top-right corner.



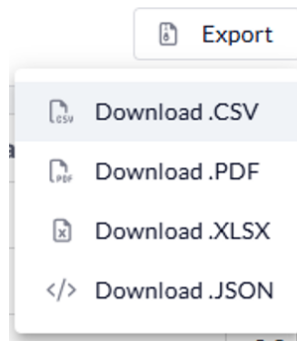
Exporting the Report

Export it to share and analyze data outside of XBert.

1. To export a custom report, select the **Export** button on the right-hand side.



2. Select the **desired file format**.



FAQ

Account & Access

Why does it say “Reset your password” if I’ve never had one?

When you first access XBert, you are creating your password for the first time. The system uses “reset” language, but this is part of initial account setup.

Do I need to allow notifications and microphone access?

Yes. Notifications and microphone access are required for features like calling and real-time communication. Without these, some functionality may be limited.

Do I need to complete the onboarding wizard?

No. You can skip it and return later. However, it’s recommended to complete it at least once to understand how to navigate your AI Employee and key features.

AI Setup & Training

What determines how my AI responds to customers?

Your AI is trained using two main components:

- [Skills](#) → control how your AI behaves (workflow, actions, tone)
- [Knowledge Base](#) → provides the information your AI uses to answer questions

Both must be accurate and complete for the best results.

Do I need to train my AI if Nextiva set it up for me?

No initial setup is required. However, you may still want to review and update

your content over time to improve accuracy and reflect changes in your business.

Testing Your AI

How do I test my AI Employee?

You can test your AI by:

- calling your AI phone number
- using the chat interface

Ask common customer questions and review how your AI responds.

What types of questions should I ask when testing?

Start with common customer questions:

- “What services do you offer?”
- “What are your hours?”

Then test:

- pricing and detailed questions
- booking or actions
- unexpected or unrelated questions

My AI gave a wrong or incomplete answer. Is something wrong?

Not necessarily. This usually means:

- the Knowledge Base is missing information
- or the information is unclear

Updating your content will improve results.

AI Behavior & Responses

Why is my AI giving incorrect answers?

This typically happens when:

- important information is missing
- content is outdated
- content is too vague

Update your Knowledge Base with clear and specific details.

Why does my AI sound generic or repetitive?

Generic responses are usually caused by vague or limited content.

Adding more detailed and structured information will improve response quality.

Why isn't my AI following the correct steps in a conversation?

This is usually a Skills issue.

Update your Skill instructions to clearly define:

- what steps to follow
- what information to collect
- when to move to the next step

Why isn't my AI taking actions (booking, lookup, etc.)?

This may happen if:

- the function is not enabled
- or it is not referenced in your Skill instructions

Verify your Functions and update your Skills accordingly.

Channels & Availability

Why isn't my AI answering calls or messages?

Check the following:

- channels (Calling, SMS, Chat) are enabled
- a phone number is assigned
- your schedule allows availability

What happens if my AI cannot help a customer?

Your AI will follow fallback settings, which may include:

- transferring the conversation
- sending a notification
- escalating to a human

How do schedules affect my AI?

Schedules determine when your AI is active. Outside of those hours, interactions may be handled by your team or follow fallback rules.

Conversations & Tickets

Where do customer conversations go?

All interactions appear as **tickets** in your inbox.

What is a ticket?

A ticket represents a single customer interaction, whether it came from:

- chat
- SMS
- phone call

Why are my tickets marked as closed?

If your AI handled the interaction successfully, the ticket will appear as closed.

Can I respond to tickets myself?

You can respond directly if you are using NEXT. Otherwise, your AI handles the conversation automatically.

Monitoring & Performance

How can I see how my AI is performing?

You can monitor performance using:

- the dashboard (for activity and conversation volume)
- the inbox (to review real interactions)

Do I need to use reports to get started?

No. Reports are optional and typically used after your AI is live and handling conversations.

Improving Your AI

Do I need to retrain my AI after making updates?

No. Updates to your Knowledge Base or Skills take effect immediately.

How often should I update my AI?

Update your AI whenever:

- your services or pricing change
- you notice incorrect responses
- new customer questions come up

What is the best way to improve my AI?

- review real conversations
- identify gaps or unclear responses
- update your Knowledge Base and Skills
- test again

Support

What should I do if something doesn't look right?

- test your AI
- review your Knowledge Base and Skills
- contact your Nextiva representative

Where can I find more detailed guidance?

Refer to the [XBert AI Optimization: Test, Fix, and Improve Your AI Guide](#) for advanced troubleshooting and improvements.