



# Nextiva Mobile App

## User guide

Version 1.3

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# Getting started

Nextiva is putting the ways your customers want to interact with you like calls and texts in one app. Now you can communicate confidently with your customers from anywhere. Instantly make a call, send messages, share files, and more — all of which are accessible on the Nextiva mobile app using your Nextiva business phone number.

## 1. Downloading the mobile app

Click one of the buttons below or scan the QR code to install the Nextiva mobile app.

Download for iOS



Download for Android



## 2. Logging in

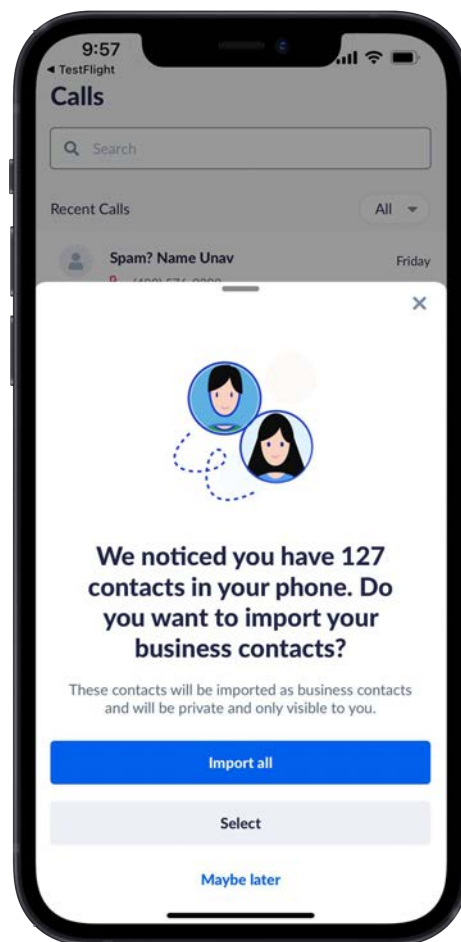
After installing the mobile app, enter the Nextiva username and password and select **Sign In**. If you forgot your username or password, [click here](#).

**NOTE:** The first time you log in you'll need to allow system access to specific settings, such as your microphone, camera, and contacts.

## 3. Importing local contacts

Quickly import local contacts saved on your mobile phone. Choose to **Import all** or manually select the contacts you want to import.

Press **Import X contacts** > choose to make the contact private or shared > **Import contact(s)**.



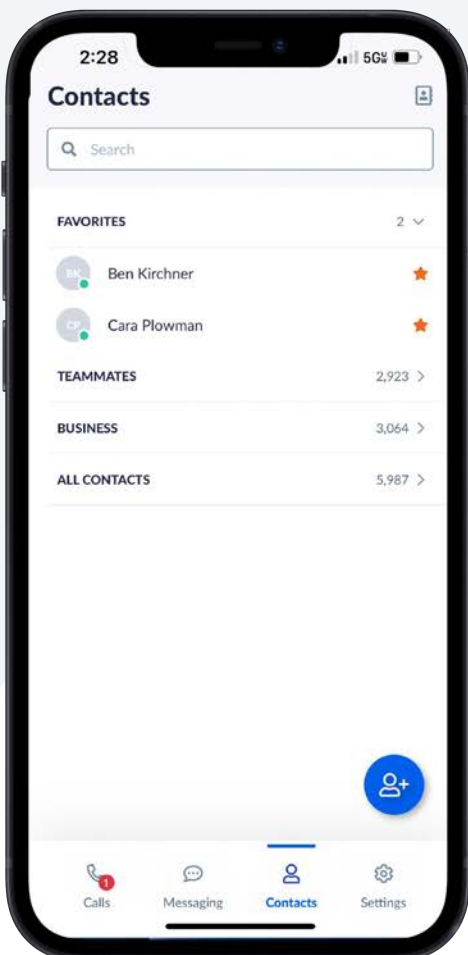
# Contacts

Quickly import local contacts from your mobile phone or add new business contacts directly from the Nextiva mobile app. Under **Contacts** you can view all saved business contacts and teammates.


Teammates are other users on the same account. A business contact may be a customer or potential prospect. There are specific features only available for teammates, such as team presence and the ability to send and receive internal chat messages.

You can set business contacts to be public so all teammates can see the contact details, or you can set them private so only you can see the contact details. All public contacts can be edited and deleted by other users on the account. Whereas private contacts can only be viewed, edited, and deleted by the user who created the contact.

Tap any contact to view contact details, such as their phone number, extension, and email.




## Adding business contacts

Under **Contacts**, tap **Add contact**  > **Create a business contact**. Enter the contact details and choose to make the contact private or shared.

## Adding favorites

Add contacts as favorites so they are easily accessible.

Tap the **Star**  next to the contact's name or under the contact's profile. Favorite contacts will show at the top of the contact list.

## Editing contacts

Select the contact to view their profile and tap **Edit** on the top right.

## Audio calls

Nextiva can replace the need for a physical desk phone or hardware – allowing you to quickly make and receive calls from your mobile phone, including the ability to transfer calls.

### Making an outbound call

Make an outbound call using one of the following methods:

- Under **Calls** 📞, tap the **Dialer** ☰ and enter the phone number or search for the contact's name. Press **Call** 📞.
- Under **Calls**, tap any recent call or contact and press **Call** 📞.
- Press **Call** 📞 at the top of any chat window or contact profile.

### Active call control

While on an active call, you can enable/disable the microphone and speaker, place calls on hold, swap and merge calls, including the option to transfer.

### Transferring

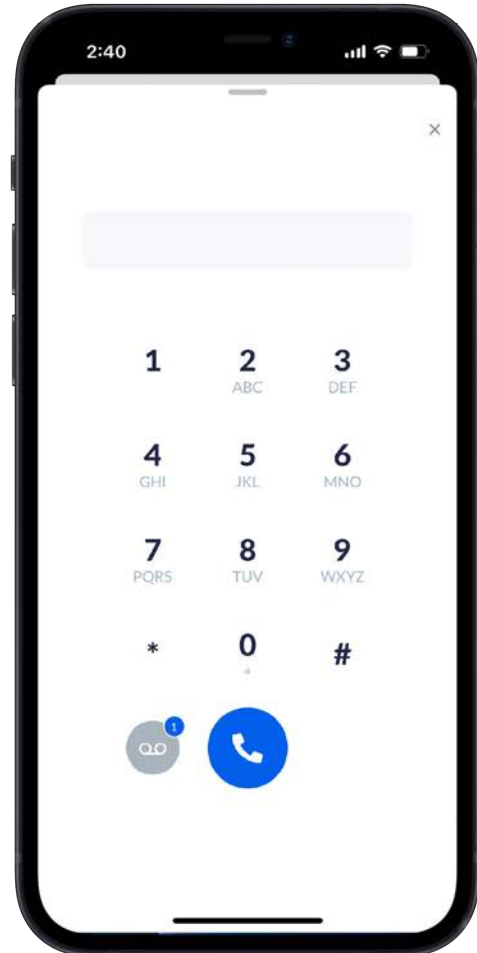
While on an active call, there are two options to transfer – A personal transfer allows you to talk to the person who will be receiving the call before transferring, whereas an immediate transfer allows you to send a call to an alternate extension or phone number without waiting for an answer or confirming the availability of the receiving party.

#### Personal transfer

While on a call, tap the **Ellipsis** (...) and enter the phone number or search for the contact's name. Choose **Call XXXXXXXXXXXX First** to speak to the call recipient before completion. Press the **green phone** when ready to complete the transfer.

#### Immediate transfer





While on a call, tap the **Ellipsis** (...) and enter the phone number or search for the contact's name. Choose **Transfer to XXXXXXXXXXXX** to complete the transfer.



# Messaging

Send and respond to text messages using your Nextiva business phone number – including the ability to send and receive files and emojis directly from one app.

## Sending a new message


- Under **Messages** , tap **New message**  and enter the phone number or search for the contact's name. Enter the message and press **Send**. Include multiple contacts to collaborate via a group chat.
- Tap on any contact and press **Message**  to chat 1:1.
- Under **Calls**, press on any recent call and press **Message** .

## Responding to a new message


You can view and respond to all new messages under **Messages** by clicking on the message to view and respond. To send files, tap the **Paperclip** . Maximum file size is 1 MB.

# Availability settings

Adjust availability settings or quickly check the status of other teammates.

Under **Settings** , you can choose to automatically show your availability or manually change your presence – including the option to add a message to show under your status.

# Voice settings

Under **Settings** , select **Call Settings** to access vital voice settings and commonly used features such as Nextiva Anywhere, do not disturb, call forwarding, and more.

## Call Center

If you have a call center license assigned, you can manage your queue status (available/unavailable) and which call queue you are signed into, if allowed by admin.

