



Nextiva CRM
Leads & Opportunities

VERSION 2

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Nextiva CRM: Leads and Opportunities

Nextiva's Customer Relationship Management tool (CRM) enhances customer relationships by tracking the customer journey from recruitment to cancellation. Nextiva CRM improves business productivity, customer sentiment, profitability, and communication processes all within one system, increasing customer loyalty and retention.

For sales teams and business development reps, pipeline analytics are key to measuring growth or decline, which is essential to any organization. Whether you prefer using visual views (Board/Kanban view) or tracking using searchable lists of prospects, Nextiva CRM Leads and Opportunities will elevate your team to save time and energy.

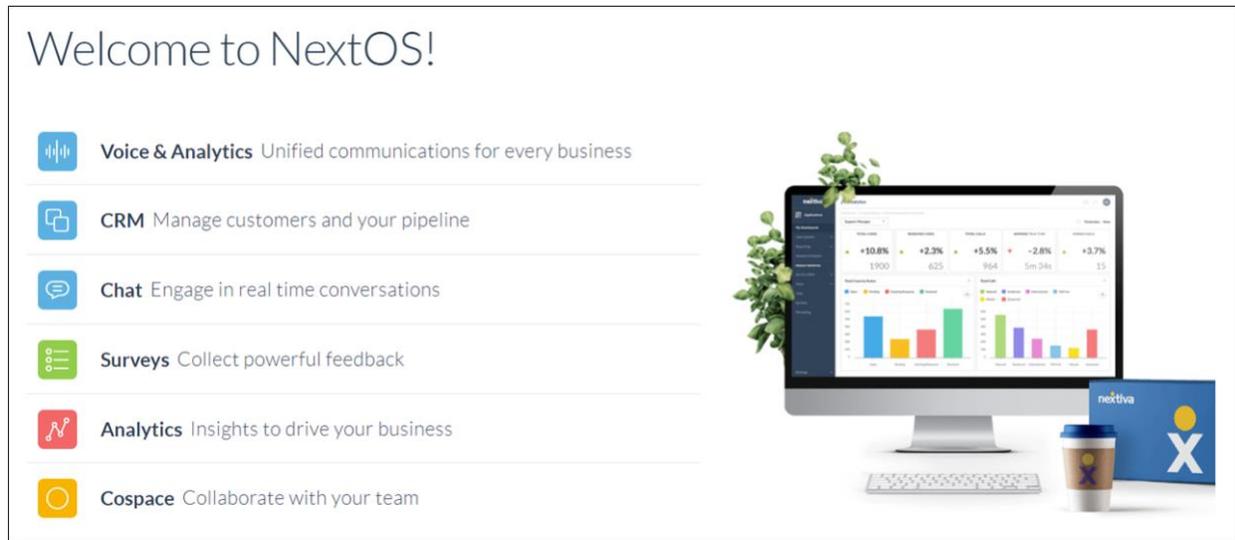
TIP: Start utilizing our default or custom stages for Opportunities, then implement Nextiva CRM Automation to create outbound communication with prospects throughout recruitment.

Use Nextiva CRM Leads and Opportunities to:

- Identify sales prospects.
- Convert Leads to Opportunities to accurately track pipelines.
- Utilize Opportunity stages based on your company needs.
- View sales analytics and customer insight.
- Communicate via CRM.

Logging In

1. Visit www.nextiva.com, and click **Login** to log in to NextOS.
2. From the NextOS Home Page, select **CRM**.



NextOS Home Page

Leads

Leads in Nextiva CRM help sales agents and managers manage and qualify potential prospects and access key performance indicators at the speed of light.

Creating Leads is the first official stage of the sales life cycle. Often a “discovery” call occurs during this stage to determine whether the Lead is real and interested.

Click **Lead** from the left panel to view all Lead records in Nextiva CRM.

Contact Name	Company	Phone	Email	Source	Agent Owner	Name	Created By	Created Date
Kevin Brevski	Brevski Brothers Tap...	8052923198	kevin@bbtaproom.com	Reference	Kris Jacobson	Sales	Kris Jacobson	2019-10-28 10:46 PM
Tia Gutierrez	Mommas and the Tapas	8059080224	tia@mommastapas.com	Phone	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 02:11 PM
Danny Schmidt	24/7 Liquor	3123032927	dan@liquorstore.com	Survey	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 02:05 PM
Mary Logan	Pizza Palace	8002974444	mary@pizzapalace.com	Phone	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 01:56 PM
Ashley Wiggins	Hair by Ashley	7146384576	ash@hairbyashley.com	Web	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 01:39 PM
Matthew Davidson	Davidson Consulting	2064073147	matt@davidson.com	Chat	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 01:36 PM
Barbara Shane	Piece of Cake Bakery	6024903140	barb@pieceofcake.com	Survey	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 01:32 PM
Jenna DuPont	DuPont Formal Wear	6024943328	jenna@formalwear.com	Reference	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 01:30 PM
Timothy Kurts	The Bacon Shop	4802920440	tkurts@baconshop.com	Phone	Kris Jacobson	Sales	Kris Jacobson	2019-10-25 01:26 PM

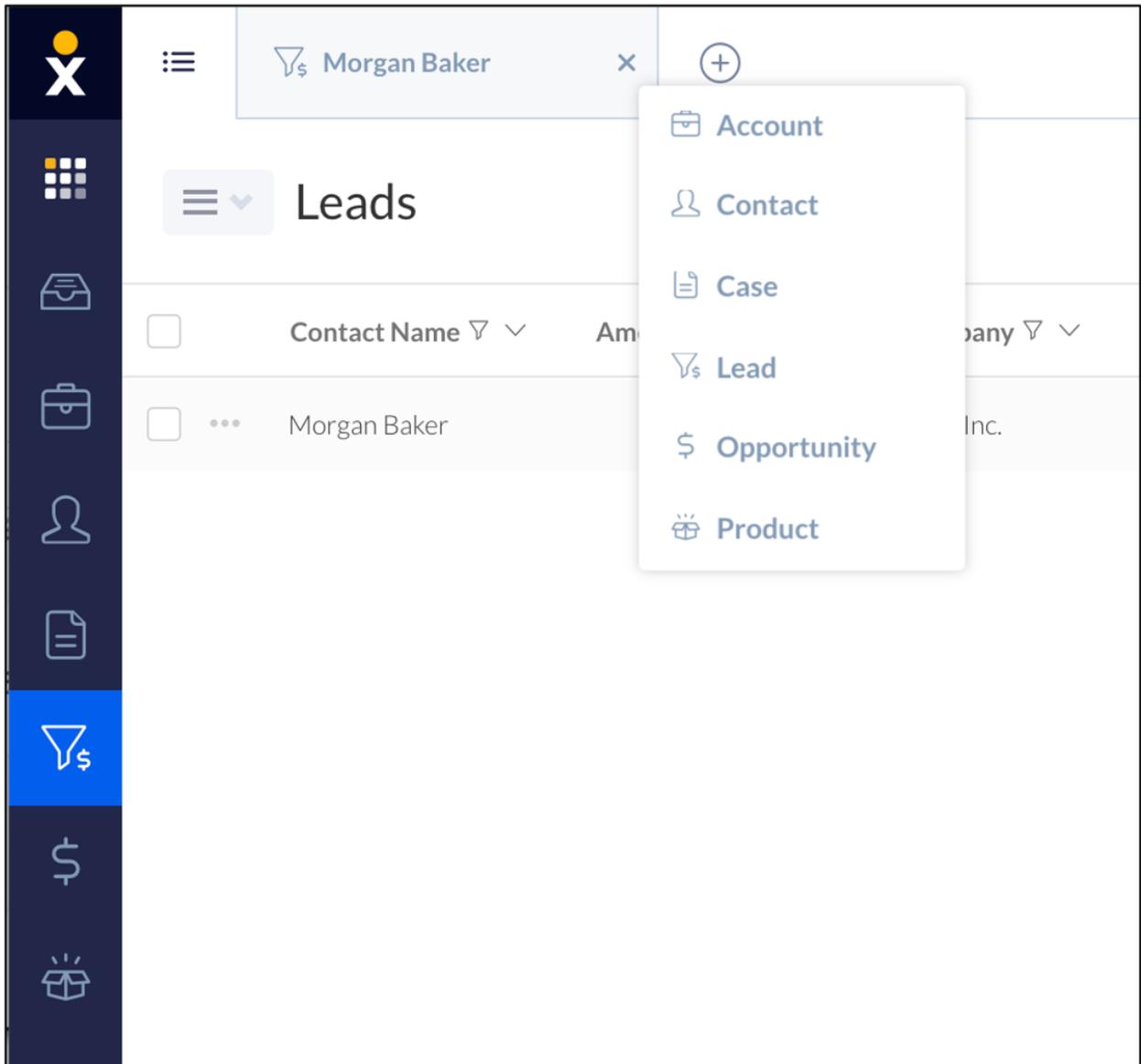
Lead View

Users can perform the following actions in Lead view:

- A. **Add New:** Click the **Plus (+)** icon to add new: Account, Contact, Case, Lead, Opportunity, Product, or a custom option.
- B. **Export Leads:** Select the checkbox next to any Lead and click **Export** to create a **.csv** file.
- C. **View Lead Details:** Click the Lead for more information.
- D. **More Options:** Click the **Ellipsis (...)** next to a Lead to **Watch**, **Open in Background**, and **Delete**. **Watch** allows you to receive alerts if the Lead is changed. **Open in Background** opens a new tab with the Lead. **Delete** may not be an option for all Users, based on permissions.

Creating Leads

1. Click the **Plus (+)** icon and select **Lead**.



Lead Option

2. Complete the **New Lead** form. Click **Create**.



New Lead

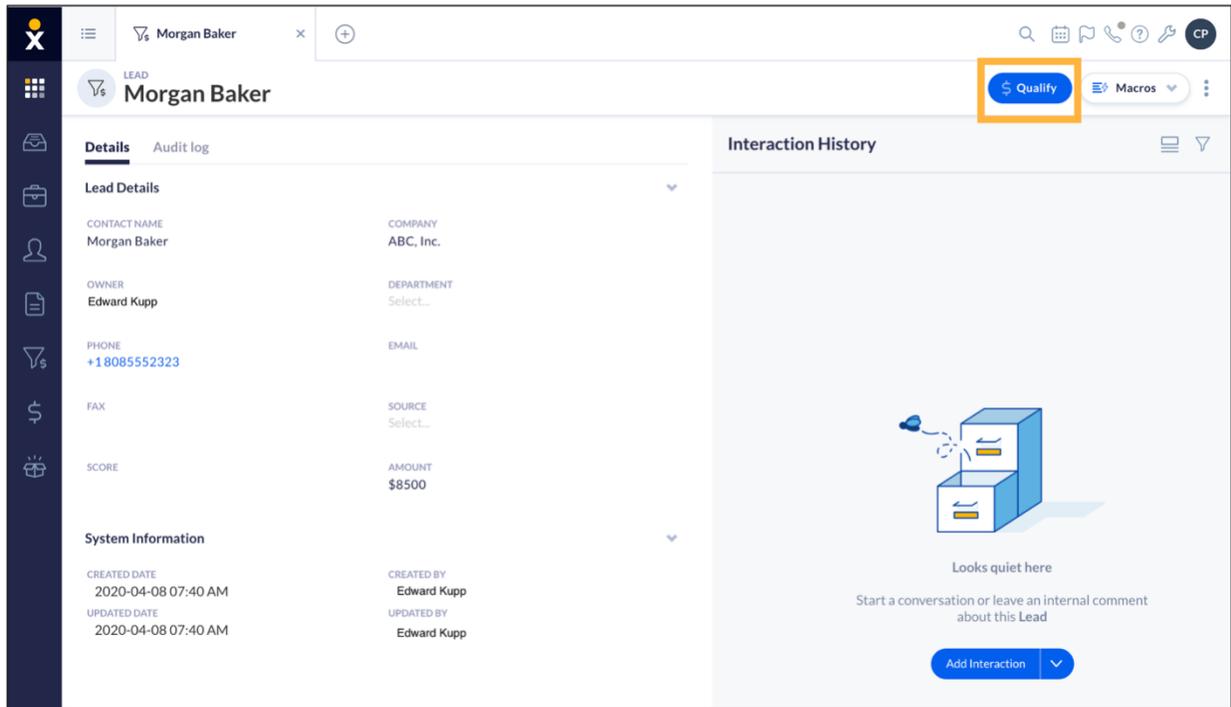
Lead Details

CONTACT NAME	COMPANY
<input type="text"/>	<input type="text"/>
OWNER Select...	DEPARTMENT Select...
<input type="text"/>	<input type="text"/>
PHONE +1	EMAIL
<input type="text"/>	<input type="text"/>
FAX	SOURCE Select...
<input type="text"/>	<input type="text"/>
SCORE	AMOUNT \$
<input type="text"/>	<input type="text"/>

New Lead Form

Lead Workspace

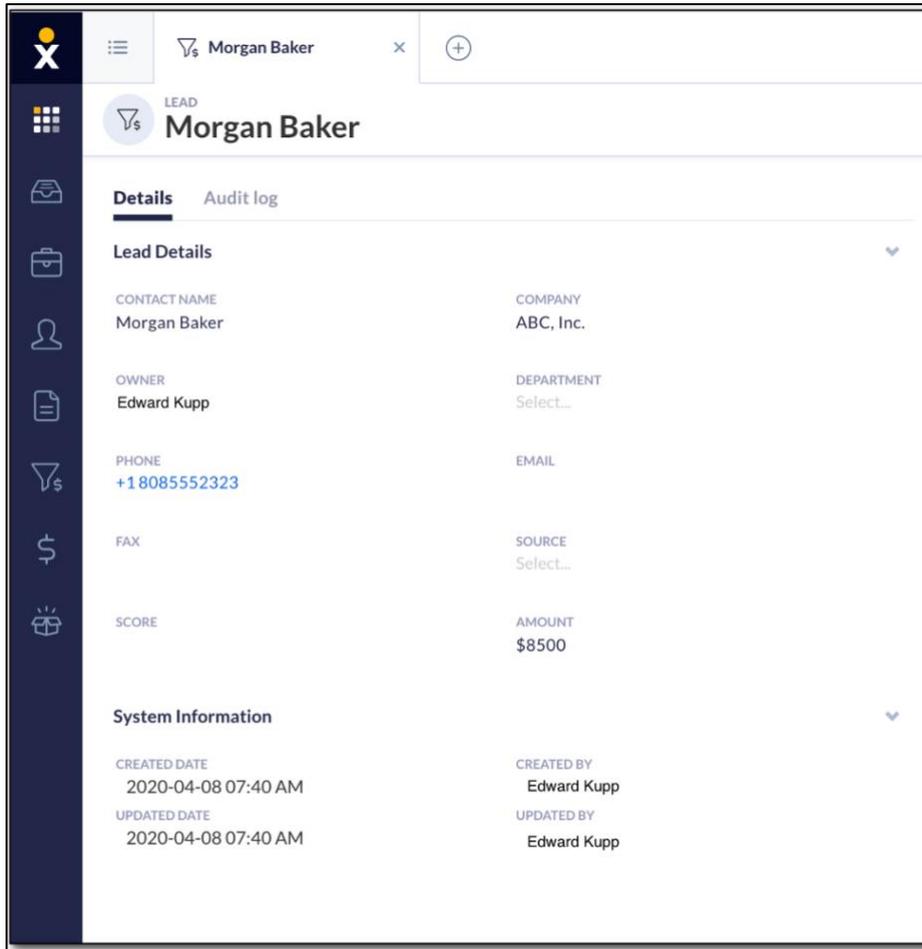
Click on any Lead to view all details. In the Lead Workspace view you can see and edit Lead details, send emails, add notes, and qualify the Lead to an Opportunity.



Lead Workspace

Details Tab

Within the **Details** tab view and edit the Lead information, such as the contact name, company, phone number, email, and more.

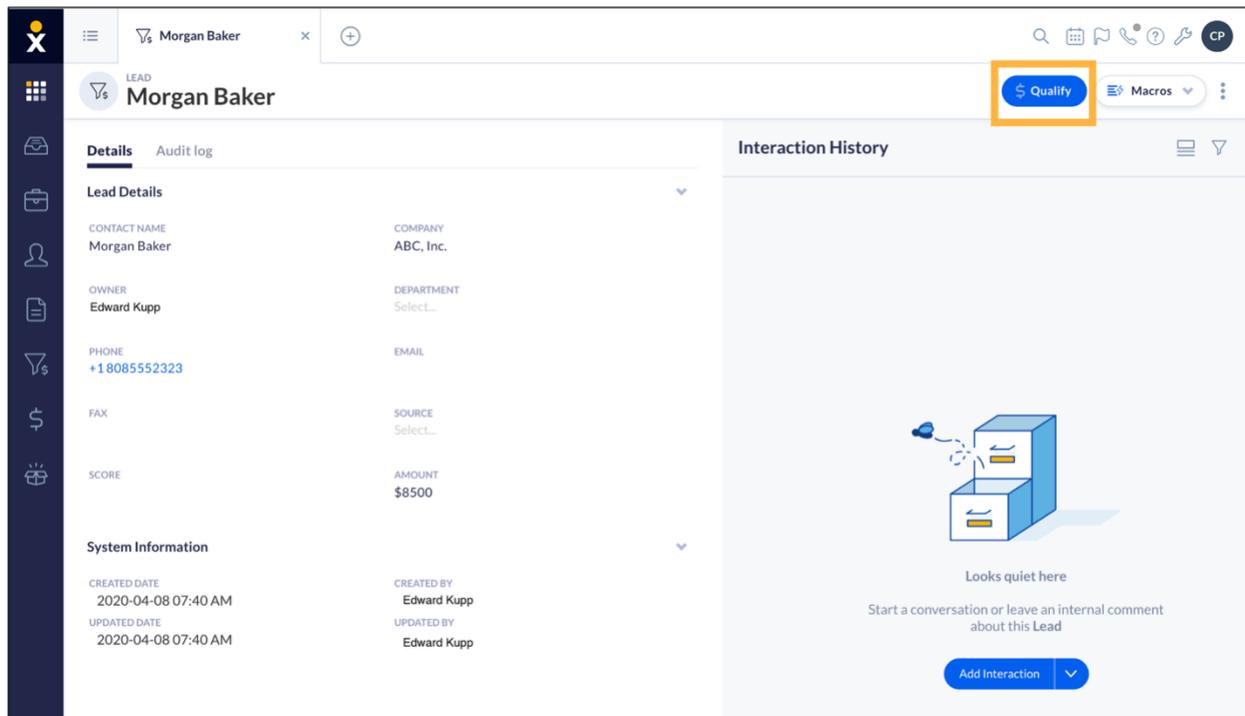


Details Tab

Qualify a Lead

When a prospective customer has more than a 10% chance of becoming a sale (or whatever likelihood you choose), it's time to qualify the Lead and convert it to the Opportunity stage. Sales associates and managers can easily track Leads and prospects through all stages of the sales life cycle under Opportunities in Nextiva CRM.

Qualify Leads to Opportunities by clicking the **Qualify** button on the top-right corner. Once a Lead has been qualified to an Opportunity, it cannot be moved back to the Lead stage.



The screenshot displays the Nextiva CRM interface for a lead named Morgan Baker. The interface is divided into two main sections: 'Lead Details' on the left and 'Interaction History' on the right. The 'Lead Details' section includes fields for Contact Name, Company, Owner, Department, Phone, Email, Fax, Source, and Amount. The 'System Information' section shows the created and updated dates and the user who performed these actions. The 'Interaction History' section is currently empty, displaying a placeholder message: 'Looks quiet here. Start a conversation or leave an internal comment about this Lead.' with an 'Add Interaction' button. A red box highlights the 'Qualify' button in the top right corner of the lead details view.

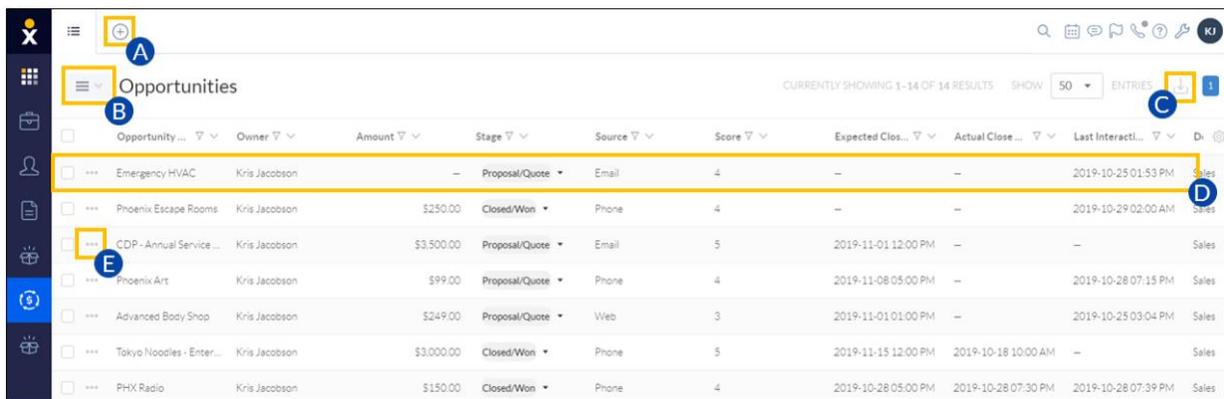
Lead Details	
CONTACT NAME	Morgan Baker
COMPANY	ABC, Inc.
OWNER	Edward Kupp
DEPARTMENT	Select...
PHONE	+1 808 555 2323
EMAIL	
FAX	
SOURCE	Select...
SCORE	
AMOUNT	\$8500
System Information	
CREATED DATE	2020-04-08 07:40 AM
CREATED BY	Edward Kupp
UPDATED DATE	2020-04-08 07:40 AM
UPDATED BY	Edward Kupp

Qualify Button

Opportunities

Accurately tracking potential sales is vital to a company's success. Not only can you manage each stage of the sales life cycle simply and professionally, but by associating your specific Products and pricing to CRM, the system will automatically calculate the value of the Opportunity too.

Click **Opportunity** from the left panel to view all Opportunity records in Nextiva CRM.



Opportunity ...	Owner	Amount	Stage	Source	Score	Expected Clos...	Actual Close ...	Last Interacti...	Di...
Emergency HVAC	Kris Jacobson		Proposal/Quote	Email	4	--	--	2019-10-25 01:53 PM	Sales
Phoenix Escape Rooms	Kris Jacobson	\$250.00	Closed/Won	Phone	4	--	--	2019-10-29 02:00 AM	Sales
CDP - Annual Service ...	Kris Jacobson	\$3,500.00	Proposal/Quote	Email	5	2019-11-01 12:00 PM	--	--	Sales
Phoenix Art	Kris Jacobson	\$99.00	Proposal/Quote	Phone	4	2019-11-08 05:00 PM	--	2019-10-28 07:15 PM	Sales
Advanced Body Shop	Kris Jacobson	\$249.00	Proposal/Quote	Web	3	2019-11-01 01:00 PM	--	2019-10-25 03:04 PM	Sales
Tokyo Noodles - Enter...	Kris Jacobson	\$3,000.00	Closed/Won	Phone	5	2019-11-15 12:00 PM	2019-10-18 10:00 AM	--	Sales
PHX Radio	Kris Jacobson	\$150.00	Closed/Won	Phone	4	2019-10-28 05:00 PM	2019-10-28 07:30 PM	2019-10-28 07:39 PM	Sales

Opportunity View

Users can perform the following actions in Opportunity view:

- A. **Add New:** Click the **Plus (+)** icon to add new: Account, Contact, Case, Lead, Opportunity, Product, or a custom option.
- B. **View Options:** Select **Table** or **Board** view. For information, see below.
- C. **Export Opportunities:** Select the checkbox next to any Opportunity and click **Export** to create a **.csv** file.
- D. **View Opportunity Details:** Click the Opportunity to view more information.
- E. **More Options:** Click the **Ellipsis (...)** next to a Lead to **Watch, Open in Background**, and **Delete**. **Watch** allows you to receive alerts if the Lead is

changed. **Open in Background** opens a new tab with the Lead. **Delete** may not be an option for all Users, based on permissions.

TIP: Users can override the Product total by entering an amount to reflect discounts or markups.

Table View

The Table view displays a list of Opportunities as rows in a table with columns of information.

Opportunity ...	Contact Name	Amount	Stage	Source	Score	Expected Clos...	Actual Close ...	Last Interact...	Department
Mommas and the Tapes	Tia Gutierrez		Needs Assessment	Phone	2			2019-10-28 03:47 PM	Sales
Stephanie Small	Stephanie Small	\$1,400.00	Closed/Won	Web		2019-11-07 12:00 AM	2019-11-08 12:00 AM		Sales
Brevski Brothers Tap...	Kevin Brevski		Needs Assessment	Reference	2			2019-10-28 10:48 PM	Sales
Fast Paint	Mark Townsend		Needs Assessment	Phone	4			2019-10-28 10:21 PM	Sales
Emergency HVAC	Don Jacobs		Proposal/Quote	Email	4			2019-10-25 01:53 PM	Sales
Phoenix Escape Rooms	Jesse Smith	\$250.00	Closed/Won	Phone	4			2019-10-29 02:00 AM	Sales
CDP - Annual Service...	Barbara Adams	\$3,500.00	Proposal/Quote	Email	5	2019-11-01 12:00 PM			Sales
Phoenix Art	Sean Fountain	\$99.00	Proposal/Quote	Phone	4	2019-11-08 05:00 PM		2019-10-28 07:15 PM	Sales
Advanced Body Shop	Terry Jules	\$249.00	Proposal/Quote	Web	3	2019-11-01 01:00 PM		2019-10-25 03:04 PM	Sales
Tokyo Noodles - Enter...	Satoshi Yamakura	\$3,000.00	Closed/Won	Phone	5	2019-11-15 12:00 PM	2019-10-18 10:00 AM		Sales
PHX Radio	Deonna Jackson	\$150.00	Closed/Won	Phone	4	2019-10-28 05:00 PM	2019-10-28 07:30 PM	2019-10-28 07:39 PM	Sales
Monthly Service Cont...	Taylor Smith	\$99.99	Closed/Won	Phone	5	2019-10-18 01:00 PM	2019-09-27 12:00 AM		Sales
Quick Towing Company	Johnny Diaz	\$99.00	Closed/Lost	Other	0			2019-10-28 11:00 PM	Sales
50 User Enterprise Se...	Tony Martineil	\$1,600.00	Closed/Won	Email	5	2019-10-28 07:30 PM	2019-10-28 08:00 PM	2019-10-28 08:12 PM	Sales
Top of the Muffin to Y...	Mr. Looman		Value Presentation	Phone	4	2019-10-31 05:00 PM		2019-10-28 08:02 PM	Sales

Table View

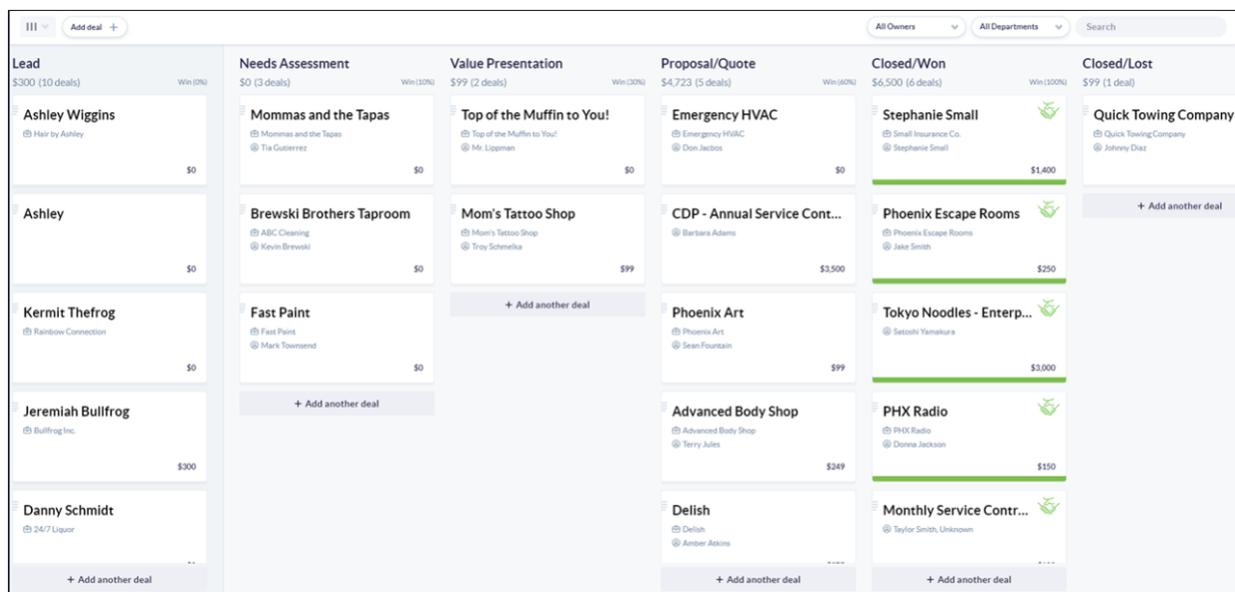
In the **Table** view, Users can easily manage their Opportunities:

- View important Opportunity information such as the Contact, the value of the proposed sale, the current stage of the sale, expected close date, and more.
- Click-and-drag columns to customize the layout.
- Search, filter, and sort the information in each column.

- Click to view and edit the details of an Opportunity.
- Export the Opportunities to a **.csv** file by clicking the **Export** icon at the top-right corner of the window.

Board View

The **Board** view displays both Leads and Opportunities as tiles on a board to help sales members better visualize their pipeline.



Board View

In the **Board** view, manage and track sales from start to finish:

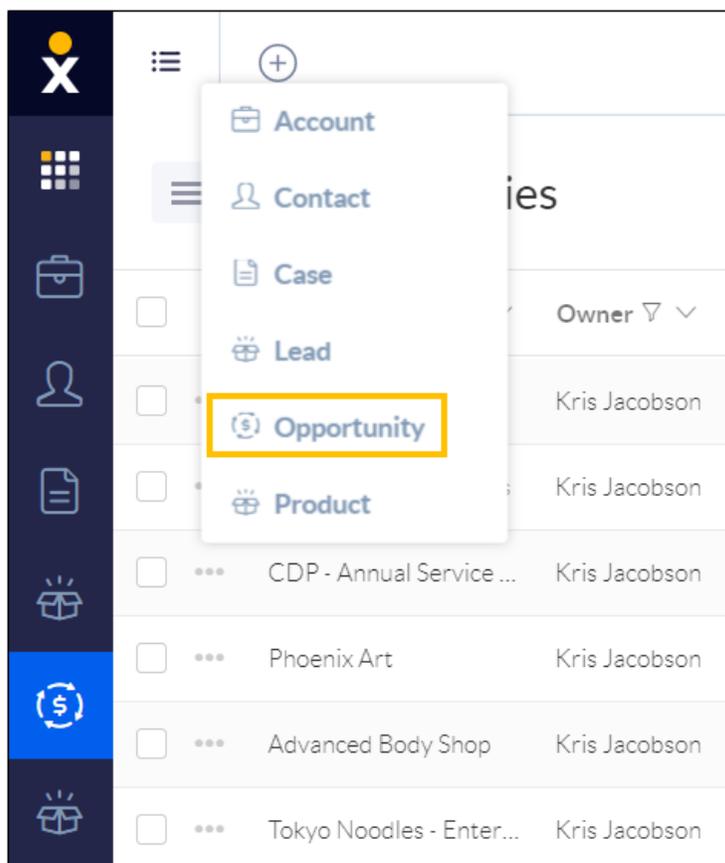
- Qualify a Lead by clicking-and-dragging the tile from the **Lead** column to the first **Opportunity** column.

NOTE: Once a Lead is qualified, Users cannot click-and-drag the tile back to the **Lead** column.

- Move Opportunities through the stages of a sale (by default these stages are setup: **Needs Assessment**, **Value Presentation**, **Proposal/Quote**, and **Closed/Won** or **Closed/Lost**).
- View how much revenue is predicted for each stage.
- Add a new Opportunity by clicking the **Add deal +** button at the top-left corner of the window or the **+Add another deal** button at the bottom of any column but the **Lead** column.
- Add a new Lead by clicking the **+Add another deal** button at the bottom of the **Lead** column.
- Filter by **Owner** and **Department**.
- Search by **Lead** and **Opportunity** name.
- Click the record name to view and edit the details of that record.

Creating Opportunities

1. Click the **Plus (+)** icon and select **Opportunity**.



Opportunity Option

2. Complete the **Opportunity Details** section:

- **Opportunity Name** (required)
- **Primary Contact** (required)
- **Account:** The Account associated with the new Opportunity.
- **Owner:** The User who owns the Opportunity.
- **Department:** The department of the owner.
- **Amount:** The value of the proposed sale.
- **Stage** (required): **Customizable*
 - **Needs Assessment:** The sales agent is still learning more about the prospect, their business needs, and their pain points with their existing product, as well as working to identify a product package to provide them.
 - **Value Presentation:** The sales agent moved to demonstrating solutions and presenting products based on the specifics identified during the previous stage.
 - **Proposal/Quote:** This stage varies widely from company to company, and may include things like delivering a quote or proposal.
 - **Closed Won/Lost:** As the sales process comes to a close, the sales agent asks the prospect to finalize the deal, which ends in either a win or loss of a sale.
- **Source:** How did they hear about your company (Phone, Email, Web)?
- **Expected Close Date:** This is great for more accurate pipeline predictions.
- **Actual Close Date:** Celebration time.

3. Click **Create**.



New Opportunity

Opportunity Details

OPPORTUNITY NAME *

PRIMARY CONTACT *

Select...

ACCOUNT

Select...

OWNER

playgametest4041@gmail.com

DEPARTMENT

Select...

AMOUNT

\$

STAGE *

Select...

SOURCE

Select...

SCORE

EXPECTED CLOSE DATE

ACTUAL CLOSE DATE

Cancel

Create

Opportunity Details

Opportunity Workspace

Click on any Opportunity to view the Opportunity Workspace. This Workspace allows Users to easily view and edit Opportunity details, Relationships, Analytics, Interactions, and more. Click any tab at the top to view key information or add new elements without navigating out of the Workspace.

The screenshot displays the 'Opportunity Workspace' for 'Phoenix Escape Rooms'. The top navigation bar includes 'Overview' (highlighted), 'Details', 'Related', 'Analytics', 'Account Activities', and 'Audit log'. The 'Overview' tab is active, showing the following information:

- Opportunity Overview:**
 - NAME: Phoenix Escape Rooms
 - STAGE: Closed/Won
 - AMOUNT: \$250
 - PROBABILITY: 100
- Contacts:**
 - Contact Name: Jake Smith
 - Email: jake@phxescape.com
 - Phone: 4802700403
 - Last Activity: Jake owns three escape rooms in Phoenix, AZ, ...
- Account:**
 - Account Name: Phoenix Escape Rooms
- Sentiment Trend:** A gauge chart showing 'Positive' sentiment with the text 'Positive language detected based on recent interaction'.
- Customer Feedback Trend:** A star rating of 4.4 stars with the text '89% positive ratings received based on recent survey responses'.
- Interaction History:** A log entry for 'Kris Jacobson' (Logged) at 2:00 AM, with the text 'Jake owns three escape rooms in Phoenix, AZ. He's looking to outfit his locations with service within the next month. He pr...'.

Opportunity Workspace

Overview Tab

By default, the **Overview** tab shows the Contact name, phone number, email, and shipping and billing addresses. Contacts and Accounts associated with the Opportunity also appear on the Overview tab.

OPPORTUNITY
\$ **Phoenix Escape Rooms**

Overview Details Related Analytics Account Activities Audit log

Opportunity Overview

NAME
Phoenix Escape Rooms

STAGE
Closed/Won

AMOUNT
\$250

PROBABILITY
100

Contacts

JS +

CONTACT NAME
Jake Smith

EMAIL
jake@phxescape.com

PHONE
4802700403

LAST ACTIVITY
📞 Jake owns three escape rooms in Phoenix, AZ. ...

Account

ACCOUNT NAME
Phoenix Escape Rooms

SENTIMENT TREND

Positive
Positive language detected based on recent interaction

CUSTOMER FEEDBACK TREND

★★★★☆
4.4 stars
89% positive ratings received based on recent survey responses

Overview Tab

Details Tab

The **Details** tab shows the potential value of the sale, the current sales stage, and more. Users can also view and edit the Contact and Account associated with the Opportunity.



OPPORTUNITY

Phoenix Escape Rooms

Overview
Details
Related
Analytics
Account Activities
Audit log

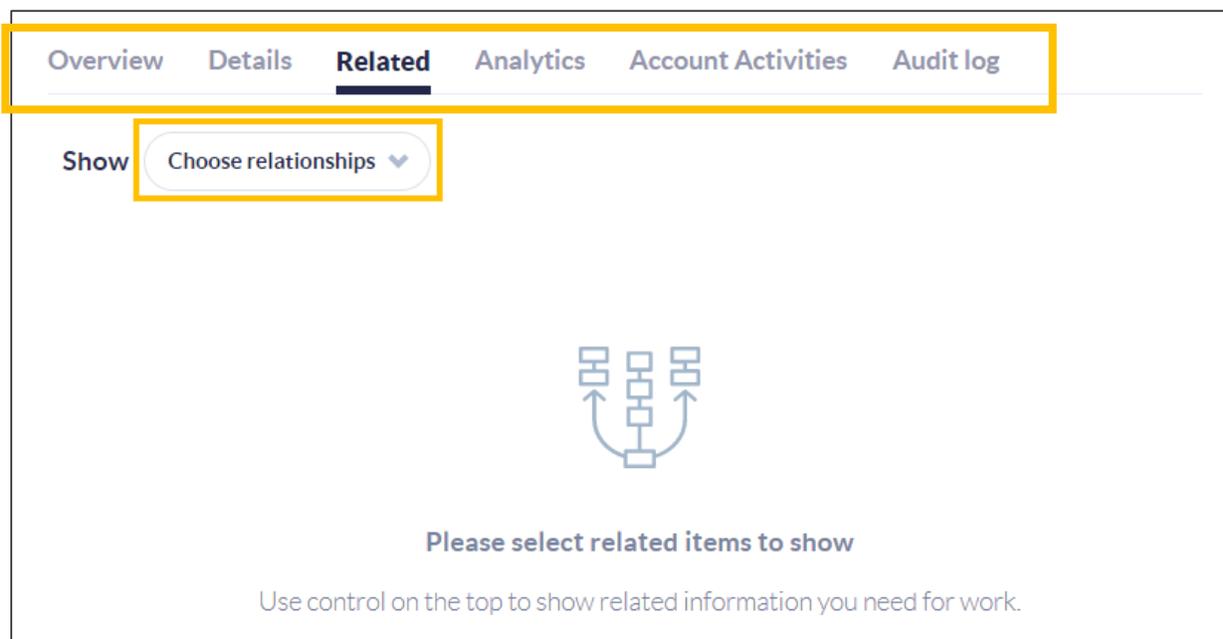
Opportunity Details ▼

OPPORTUNITY NAME
Phoenix Escape Rooms

<p>PRIMARY CONTACT Jake Smith</p>	<p>ACCOUNT Phoenix Escape Rooms</p>
<p>OWNER kris.johnson@nextiva.com</p>	<p>DEPARTMENT Sales</p>
<p>AMOUNT \$250</p>	<p>QUOTED AMOUNT</p>
<p>STAGE Closed/Won</p>	<p>SOURCE Phone</p>
<p>SCORE 4</p>	<p>PROBABILITY 100</p>
<p>EXPECTED CLOSE DATE</p>	<p>ACTUAL CLOSE DATE</p>

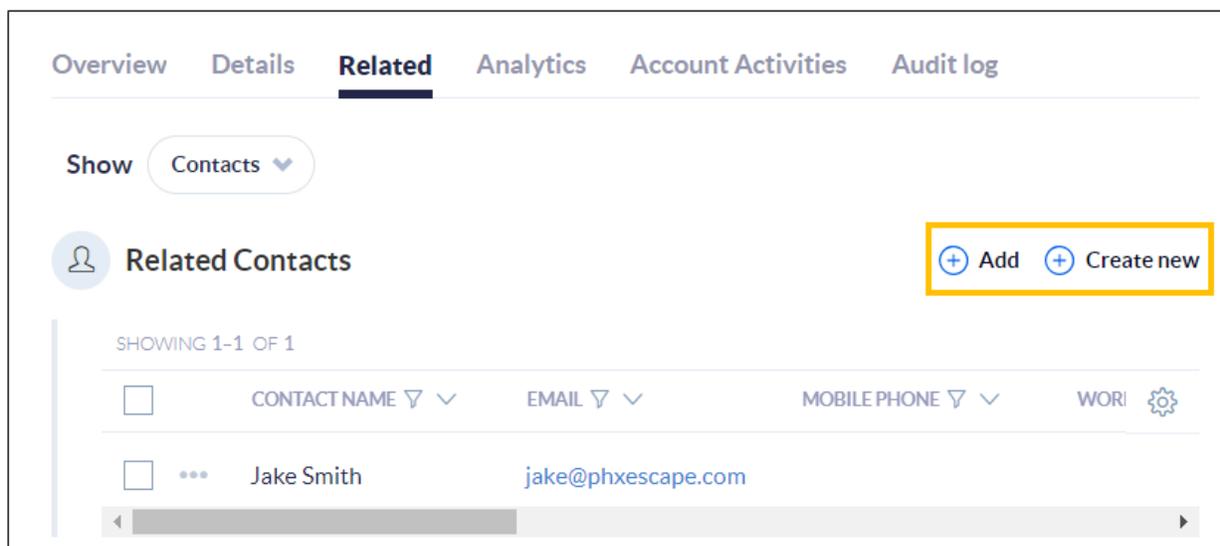
*Details Tab***Related Tab**

The **Related** tab displays all relationships associated with the Opportunity. For example, an Opportunity may have multiple contacts, which are setup as a relationship. Click **Choose relationships** and select: **Attachments, Contacts, or Products** from the drop-down menu.



Related Tab

To associate an existing Account with an Opportunity, for example, hover over the top-right corner above the table and click **Add**.



Add/Create New Options

Analytics Tab

On the **Analytics** tab, view and quickly reference the Sentiment Trend and Customer Feedback details.

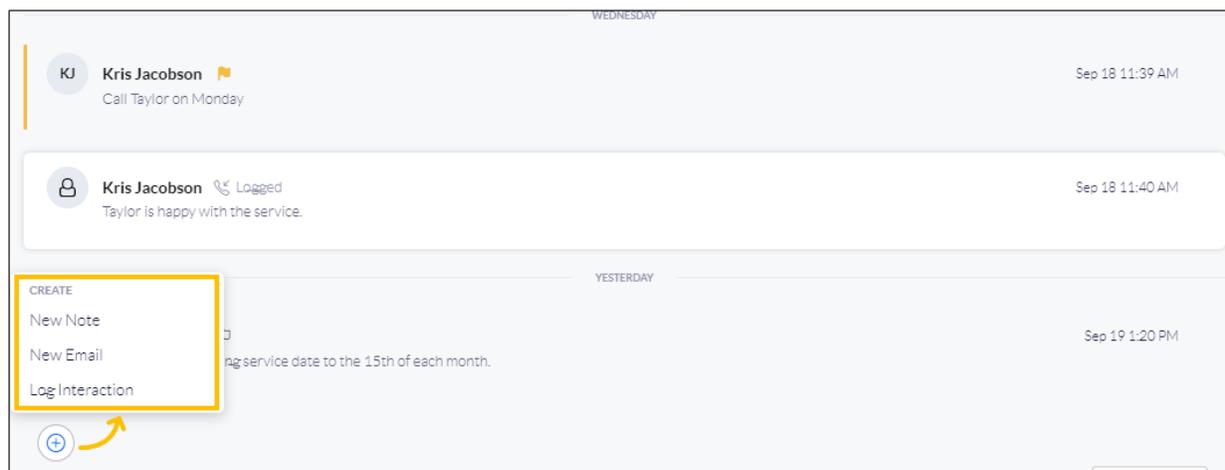
- **Sentiment Trend** estimates how happy the customer is based on the most recent interactions. Nextiva CRM calculates this metric by gathering positive and negative keywords in the Account's activities and SmartTopics. This can be customized based on customer needs and industry.
- **Customer Feedback Trend** reports the outcome of any surveys the customer has completed.

Account Activities

If there is a Case associated with an Account, the **Account Activities** tab will display all Cases related to the Opportunity. Users can sort Cases by last **Created** or **Updated**, or filter only **Unassigned** Cases.

Interaction History

Users can also create a [Note](#), [Email](#), and [Log Interactions](#) by clicking the **Plus (+)** icon on the bottom-left corner of the **Interaction History** feed.



Interaction History Feed

Notes

Internal communication regarding a prospect or customer is often just as important as direct-to-customer interactions. Notes about a customer's specific requests or limitations, or anything at all, will be logged and tied to the prospect throughout their relationship with your organization. This keeps all communications centralized and easy to reference or search.

TIP: Flag special or VIP notes to see them any time the Account or Contact is accessed.

Adding Notes

Add Notes associated with anything in Nextiva CRM. Just look for the **Interaction History**.

Click on one of these:



CRM Icons

For example, let's open an Account to view the Workspace and **Interaction History**.

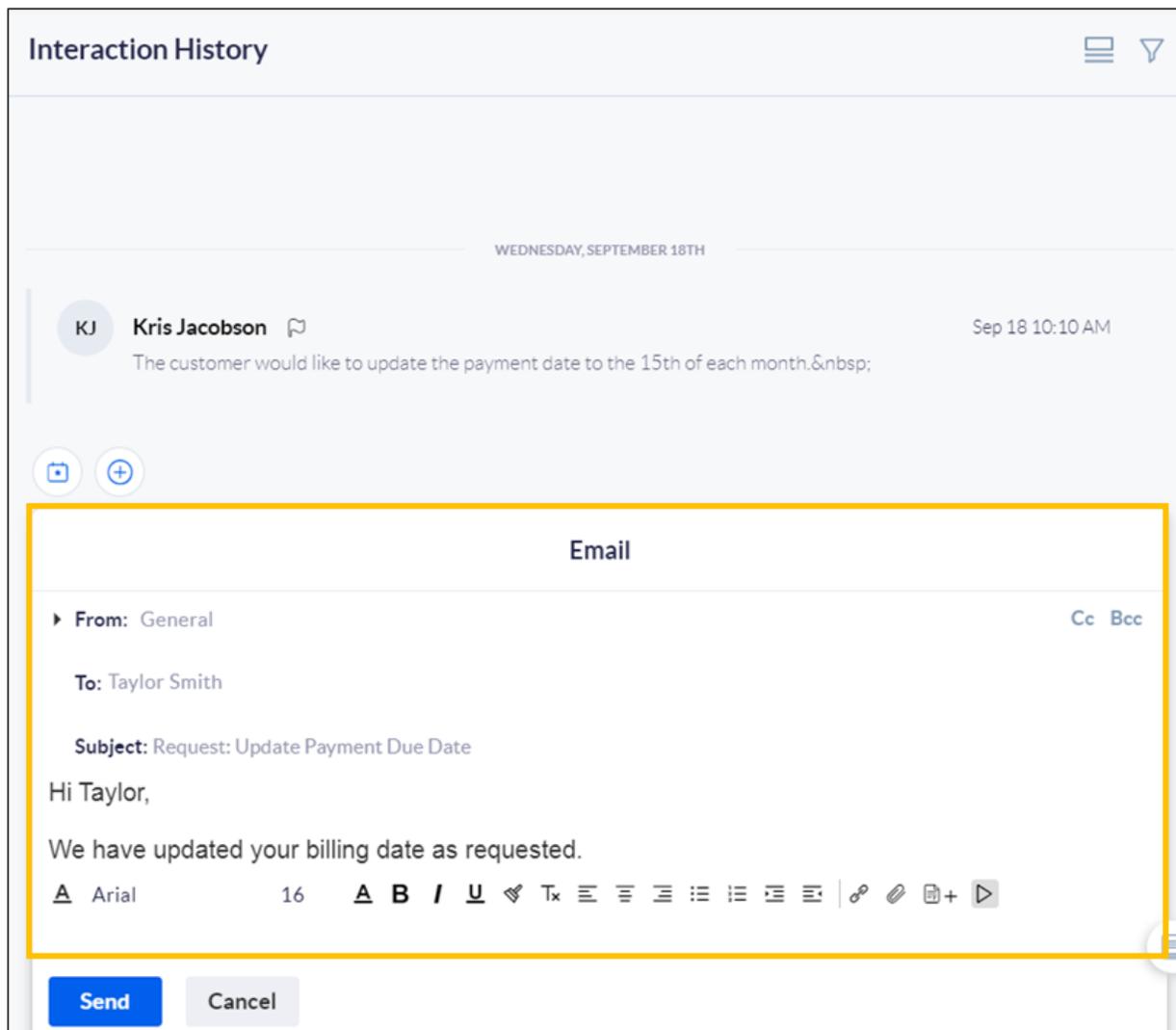
The screenshot shows the CRM interface for the account 'Heartt Services'. The top navigation bar includes tabs for 'Heartt Services', 'Pumpkin Spice Recipe', and 'Morgan Baker'. The left sidebar contains various icons for navigation. The main content area is divided into two columns. The left column, titled 'Overview', includes sections for 'Account Overview', 'Recent Cases' (with 'Create Case' and 'Add Existing Case' buttons), 'Recent Opportunities (1)' (listing 'Musica'), and 'Contacts' (listing 'Terry Heartt'). The right column, titled 'Interaction History', shows three metrics: 'Account Experience Score' (0), 'Customer Feedback Trend' (None), and 'Sentiment Trend' (None). A yellow circle highlights the 'Add Interaction' button in the Interaction History section.

This screenshot shows a detailed view of an interaction in the 'Interaction History' section. The interaction is dated 'WEDNESDAY, SEPTEMBER 18TH' and is from 'Kris Jacobson' at 'Sep 18 10:10 AM'. The message text reads: 'The customer would like to update the payment date to the 15th of each month. '. Below the message, a 'Note' modal is open, featuring a text input field with the placeholder 'Write a note.', a rich text editor toolbar, and 'Save' and 'Cancel' buttons. A yellow border highlights the note input area.

Interaction History & New Note

Interacting via Email

Interact with potential prospects via email also within **Interaction History**.



The screenshot displays the 'Interaction History' interface. At the top, the title 'Interaction History' is visible on the left, and a list icon and a filter icon are on the right. Below the title bar, a date separator indicates 'WEDNESDAY, SEPTEMBER 18TH'. A message from 'KJ Kris Jacobson' is shown, dated 'Sep 18 10:10 AM', with the text: 'The customer would like to update the payment date to the 15th of each month. '. Below the message, there are two circular icons: a calendar icon and a plus sign icon. A yellow-bordered box highlights the 'Email' composition window. The window has a title 'Email' and contains the following fields: 'From: General' (with 'Cc Bcc' options), 'To: Taylor Smith', and 'Subject: Request: Update Payment Due Date'. The body text reads: 'Hi Taylor, We have updated your billing date as requested.' Below the text is a rich text editor toolbar with options for font (Arial), size (16), bold (B), italic (I), underline (U), link, unlink, insert image, and play. At the bottom of the window are 'Send' and 'Cancel' buttons.

New Email

