# MyNextera Administrator Guide
Revised 4.2020

## WELCOME!

This guide is intended to get you up and running with MyNextera, your OnLine Account Manager. As Administrator, you get instant access to a host of viewing, editing and managing capabilities for your account and for the features enabled on all of the telephone numbers within your account.

This guide covers:

1. **Customer –** Contains your account profile as well as technical and vendor contact information.
2. **Billing/Call Activity** – Provides opportunity to review balances, invoice and payment history, call activity and to make a payment.
3. **CommPortal** – Used to configure your global business group settings as well as the call services for all business group lines.
4. **911 Address Change** – Ability to make emergency dialing (911) address change(s). Only for VoIP 'transient' service customers.

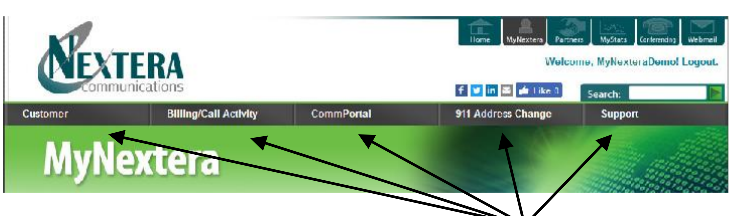
As always, you can contact our local Customer Care team at 877.639.8372 and we will be happy to assist you.

## MyNEXTERA ACCESS

Step 1: Go to www.nextera.net (or www.mynextera.net and skip Step 2).

Step 2: Click on 'MyNextera' icon.

Step 3: Enter your Username and Password then click 'Log In' button.




**MyNextera Menu Items**

## Customer tab:

**Account Profile:**

- **Account Management** contains your account information as contained in the Nextera database. The name and address fields are editable by clicking the 'Edit' button, making your changes, and then clicking the 'Update' button.
- **Authorized Users** contains user validation information for those people that require full account disclosure. Only those identified will have the ability to inquire/receive account balances and invoices, inquire about usage, have the ability to add, modify and delete features and services, etc. All of the fields are editable by clicking the 'Edit' button, making your changes, and then clicking the 'Update' button.

**Technical Contacts:** Nextera will use this contact information when communicating maintenance windows, service issues, technically-related updates, etc.

**Vendor Contacts:** Nextera will utilize this information for reference only. Nextera will not contact your vendor directly without customer acknowledgement/approval.

## Billing/Call Activity tab:

**Balance:** View your current billing cycle, payment due date and current balance.

**Make a Payment** allows you to make either a one-time payment or establish monthly payments. Payment options include Credit Card or Checking/Savings.

**Invoice & Payment History** identifies the date of and total billed for each of your invoices and the dates and amount of payments applied. Click the 'View PDF' button associated to any invoice and download the invoice for review and/or printing.

**Call Activity** is where you can 1) view your calls from previous billing cycles or your current activity (not yet billed); 2) view the activity for all of the lines in your business group (by choosing All) or select a particular line number; 3) populate the matrix based on the Billing Cycle and Line Number(s) chosen and sort by clicking on any of the headings; and 4) download a .csv file to manage your call records in a spreadsheet program by clicking on the 'Export CSV' button.

**CommPortal** tab:

As Administrator, view and configure your subscribed services and calling features. Modifications can be completed at any time and as often as you'd like. **Please note that all changes become effective immediately.**


**Groups:**

Hunt Groups (Multi Line Hunt Groups (MLHGs)): The Hunt Groups page displays all of the Hunt Groups in the Business Group or department(s) that you have permission to administer.

- To move a MLHG to another department:
  - Select the MLHG using the checkbox to the left of the MLHG.
  - Select the department you wish to move the MLHG to using the drop-down list.
  - Click on 'Move'.
- Viewing and modifying: Select the MLHG by clicking anywhere on its entry which takes you to a series of tabs:
  - Hunt Group Pilots: A pilot number is one which when called, enters this Hunt Group. Click anywhere on a Pilot Line entry to access the line information. This allows you to configure the Pilot line, for example, you can enable or disable the Unavailable Call Forwarding and configure the forwarding number that would be used if all your lines were unavailable.
  - Hunt Group Members: This tab displays all of the lines which are members of this Hunt Group. There is an icon which indicates whether each member is currently logged into the Hunt Group.
- Adding lines: If you know the number, enter it in the text box on the top right and click 'Add'. If you don't know the number, click on 'Add Lines'. To select onr or more lines to add, use the checkboxes to the left of the lines and click 'Add Selected'.
- Removing Lines: Select the line to remove by using the checkbox to the left of it and click 'Remove Selected'.
- Changing positions: Click on 'Change Positions', move lines up and down using the icons, and click 'Apply'.
- Settings:
  - Preferences: Rename the MLHG, by typing the name in the text box and 'Apply'.
  - Settings: See the call distribution algorithm and other detailed MLHG setting . You can also choose whether the Pilot Line's information (DN and name) is delivered as the Caller ID.

**Sim-Ring Groups (Multiple Appearance Directory Numbers (MADNs)):** The Sim-Ring Groups displays all of the MADNs within your Business Group that you are allowed to administer.

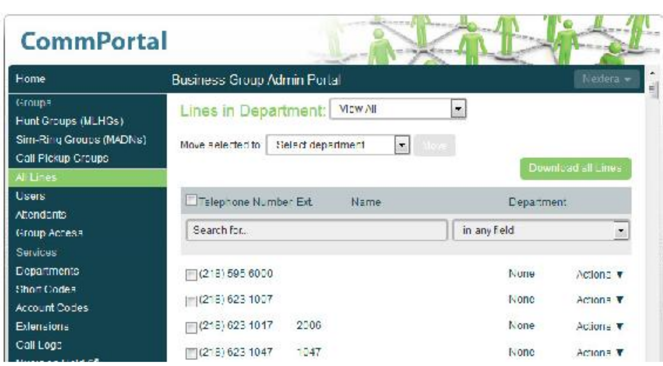

- View and Modify: Click anywhere on the Sim-Ring Group's entry or click 'Actions', then 'View group settings'.
  - Sim-Ring Group Members displays all of the lines that will ring when the Sim-Ring Group is called. If you want to add a single line and know the number, enter it in the 'Add single line' text box on the top right and click 'Add'. If you don't know the number, click on 'Add Lines'. To select one or more lines to add, use the checkboxes to the left of the lines and click 'Add Selected'.
  - Removing Lines: Select the line to remove using the checkbox to the left of it and click 'Remove Selected'.
  - Other Settings: Identifies the Call Limit Algorithm in use for this Sim Ring group.

- Change Sim-Ring Group Line Settings by clicking on the 'Actions' drop-down and select 'View line settings'. Refer to the User Manual for configuration.

**Call Pickup Groups**: Calls to a Business Group line that is a member of a Call Pickup Group can be answered by any other member of that group.

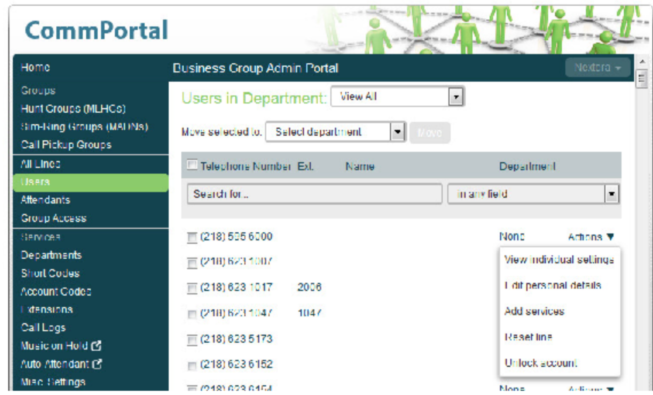
- Moving Call Pickup Groups: Select the Call Pickup Group using the checkbox to the left of the Call Pickup Group. Select the department you wish to move the Call Pickup group to using the drop-down list at the top of the page. Click on 'Move'.
- Adding Call Pickup Groups: Select the department to which you want to add the Call Pickup group, click 'Add Group', enter the name of the new Call Pickup Group in the text box, then click 'Add'.
- Deleting Call Pickup Groups: Select the Call Pickup group using the checkbox to the left of the Call Pickup Group then click 'Remove Selected'.
- Viewing and Modifying: Select the Call Pickup Group by clicking on its entry. This takes you to the page for that Call Pickup Group.
- Adding lines: If you know the number, enter it in the text box on the top right and click 'Add'. If you don't know the number, click 'Add Lines'. To select one or more lines to add, use the checkboxes to the left of the lines and click 'Add Selected'.
- Removing lines: Select the line to remove by using the checkbox to the left of it. Click 'Remove Selected'.
- Settings: Allows you to view and change the name of the Call PickUp Group by entering the new name in the text box and clicking 'Apply'.

**All Lines**




Choose to 'View All' lines or the lines within a specific department. Move lines from one department to another.

The 'Actions' drop-down has some or all of the following options, depending on the type of line. Each option opens a pop-up where you can view or configure.




- View and configure individual line settings. Refer to the User Manual for specific configuration.
- View and configure group settings for the line (if the line is a member of a Group, for example, a Hunt Group).
- Edit personal details allows renaming of the line.
- Reset the line: This option does not allow any changes. Please contact your Nextera Account Executive at 877.639.8372.
- Unlock Account will unlock access to CommPortal after too many failed attempts.

**Departments**

Departments allow you to divide your Business Group into separately-administrable groups (see 'Departments' below)

- View your departments by clicking on 'Department' from the main menu. If you have a very large number of departments, you can use the *Search for* box to find a department. As you type, matching departments are shown, with the matching text highlighted in yellow.
- Adding departments: Each business group can have up to 1,000 departments. To create a new one, click 'Add Department' and enter the Department name, choose the parent department (if this is a top level department, you will use the business group name or if a sub department, this will be the upper level department), enter an Operator number for the number of the line that will act as operator for this department. You can also limit the number of calls allows for this department as follows:

- Incoming & Outgoing: Enter the total number of combined concurrent calls that this department will be permitted to have active at any given time.
- Incoming: Enter the total number of concurrent incoming calls that this department will be permitted to have active at any given time.
- Outgoing: Enter the number of concurrent outgoing calls that this department will be permitted to have active at any given time.

NOTE: To allow any mix of incoming and outgoing enter the same value in all three fields or set both the Incoming and the Outgoing fields to Unlimited.

**Short Codes**

Short Codes are codes that are defined for the entire Business Group or for a department within the group which when dialed will ring a pre-defined number. Short codes are a series of digits that optionally start with a * or #.

- Moving Short Codes: To move Short Codes between departments, select the Short Code or Short Code range using the checkbox to the left of the Short Code or Short Code range. Select the department you wish to move the Short Code(s) to using the drop-down at the top of the page. Click 'Move'.
- Adding Short Codes: Click 'Add', enter the number of the Short Code to add, enter the telephone number or internal code the Short Code should dial, and then click 'Add'. If adding a Short Code Range, click 'Add Range'. Enter the first and last numbers of the Short Code range to add. Optionally, enter the telephone number or internal code the first Short Code in the range should dial. Click 'Add'.
- Deleting Short Codes: Select the Short Code or Short Code range using the checkbox to the left of the Short Code or Short Code range and click 'Remove Selected'.
- Modifying Short Codes: Click on either the Short Code number or the number the Short Code dials, modify the details, then click 'Save'. To modify a Short Code range, click on either the Short Code range numbers or the numbers the Short Code range dials, modify the details, click 'Save'.

**Account Codes**

Account Codes are codes that are mandatory to be added before dealing a calling number. There are two types of account codes being validated and non-validated. If validated, there are specific numbers that are assigned that must be used vs non-validated where any number with the appropriate number of digits can be used.

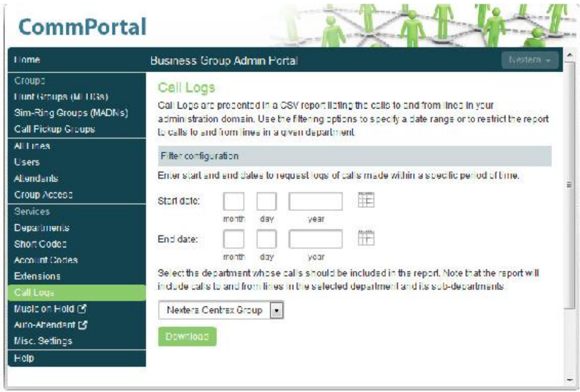
Account Code configuration can be viewed but not changed. To ad, delete, or modify Account Codes, please contact Nextera Customer Support at 877.639.8372.

**Extensions**

- Adding Extensions: Click 'Add', enter the number of the extension to add, enter the telephone number of the line in your business group that this Extension should map to, then click 'Add'. To Add a Range of Extensions, click 'Add Range', enter the first and last Extension numbers to add, enter the telephone number of first line in your business group that this Extension range should map to, then click 'Add'.
- Deleting Extensions: Select the Extension or Extension range using the checkbox to the left of the Extension or Extension range then click 'Remove Selected'.
- Modifying Extensions: Click on either the Extension number or the phone number of the Extension, modify the details, then click 'Save'. To modify a range, click on either the Extension range numbers or the phone numbers the Extension range dials, modify the details, then click 'Save'.

**Call Logs**

Call Logs provide a concise summary of every call that passes through the Nextera switch, providing details such as calling number, called number, start time, end time, and trunk routing details. As well as being able to view the call logs in real time, you can save these call logs to files for later processing.




- Click ‘Call Log’s menu bottom to launch a new page that allows you to export call logs. The report will contain the logs of all calls made (up to a month at a time) to and from lines within the whole business group, within a department or within sub-departments. The file is produced in a csv format and can then be downloaded onto your computer for later importing into your spreadsheet programs (such as Excel) for review and/or manipulation.

**Music On Hold and Auto Attendant**

If subscribed to these services, click the appropriate link to view or make modifications. An Auto Attendant guide is available online or by contacting Nextera Customer Support at 877-639-8372.

**Misc. Settings**

**<u>Number Blocks</u>** displays all of the telephone numbers which have been assigned to your business.

**<u>External Call Settings</u>** identifies the carrier code for your calls with 6430 being Nextera’s carrier code.

**Emergency <u>Call Notifications</u>** provides either an email alert and/or automatic telephone announcement to one or more specified users when 911 is dialed from a line in your business group. The Notifications can be established for the entire business group and/or individual departments.

To establish new Email contacts:
- Click ‘Call Notifications’.
- Click ‘Add New’ button.
- Within Department, choose the entire Business Group or a specific Department. If the Department has already been created, click ‘Actions’ within the Department to Edit or Clear.
- Enter a Name for the Contact (i.e. Receptionist).
- Enter an email address.
- Add additional Names and Email Addresses, as appropriate.
- Click ‘Save’.

To establish telephone announcements:

- Click Call Notifications.
- Click ‘Add New’ button.
- Within Department, choose the entire Business Group or a specific Department. If the Department has already been created, click Actions within the Department to Edit or Clear.
- Enter a Name for the Contact (i.e. Principal).
- Enter a telephone number (can be an extension or 10-digit number) with no dashes (i.e. 6124561234). The telephone number does not need to be within the Business Group but rather can be a cell phone, home phone, etc.

After enabling/creating the notifications, if a telephone number associated to the Department places a 911 call, the contact will be notified with an indication of who placed the call, what their TN is, what number was dialed, and date and time of the call. Emails will be sent with high importance. Phone calls will continue until the call is answered and ‘1’ is dialed to indicate that it has been heard.

**To test whether the notifications are working, dial the emergency test number of 9590911** which processes as though 911 was dialed but without extending to the Public Safety Answering Point. The expected response is a high-pitched tone and the notification will include 2188189998 as the number that was dialed. **DO NOT DIAL 911 FOR TESTING.**

**Phones**

<u>UC Integration</u>
If subscribed to Accession Desktop, there are opportunities to enable UC Integration (CRM, Conferencing, Collaboration, and Cloud-hosted services) as a group (your Nextera business group) and at a per line level.

Enabling and configuring CRM (such as Salesforce) will provide a screen-pop if the program is active and if the User has enabled Salesforce to Auto-search 'When accepting calls'.

For other types of apps, Users can easily choose which one (of each) they wish to utilize or you, as Administrator, can enable just one of each. Users can then launch those apps from Accession Desktop within Tools..

To configure for your entire Nextera business group:

- Click 'Phones', then above the matrix, click 'manage your phone profiles' (within the sentence 'Assign phones to lines using the table below or manage your phone profiles').
- Click 'Accession Communicator for Desktop' and 'Edit'.
- Within UC Integration, the first option is Enabled Services which allows you to choose whether CRM, Conferencing, Collaboration, and/or Cloud-hosted services/apps will be available for lines within your group.
- Within each of the CRM, Conferencing, Collaboration, and Cloud-hosted Services, you then enable, name and provide the specific URL for up to 5 services in each category.

To choose specific programs at a line level:

- Click 'Phones', then under Actions within the TN of choice, click 'Change Configuration'. From the Manage your phones screen, choose 'Accession Communicator for Desktop' and 'Edit'.
- Within Enabled Services, choose whether you want CRM, Conferencing, Collaboration, and/or Cloud-hosted services enabled for the line chosen.
- Within each of the CRM, Conferencing, Collaboration, and Cloud-hosted Services, you can enable/disable, keep/change name and keep/change the specific URL.

<u>Orbit Code Friendly Names</u>

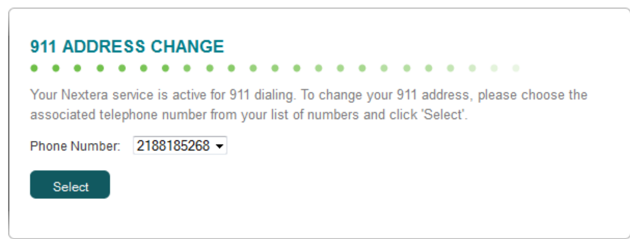
If subscribed to Call Park, apply a Label to each orbit to more easily park calls.

**911 Address Change** tab:

Nextera automatically makes 911 emergency dialing available when you sign up for a VoIP 'transient' service. During signup you were prompted to complete physical address location information. If you need to change this address, you can edit it via the 911 Address Change link at any time and as often as needed. **Note: Any changes to your emergency calling service become effective within minutes.**

To view or make modifications to your current physical address:

- Choose the appropriate telephone number from the dropdown list and click 'Select'.




- Modify address information and click 'Update'.