



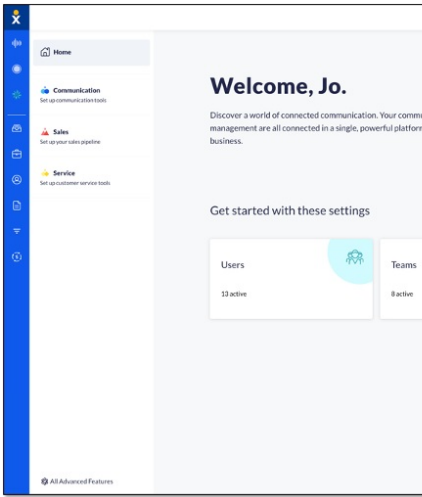
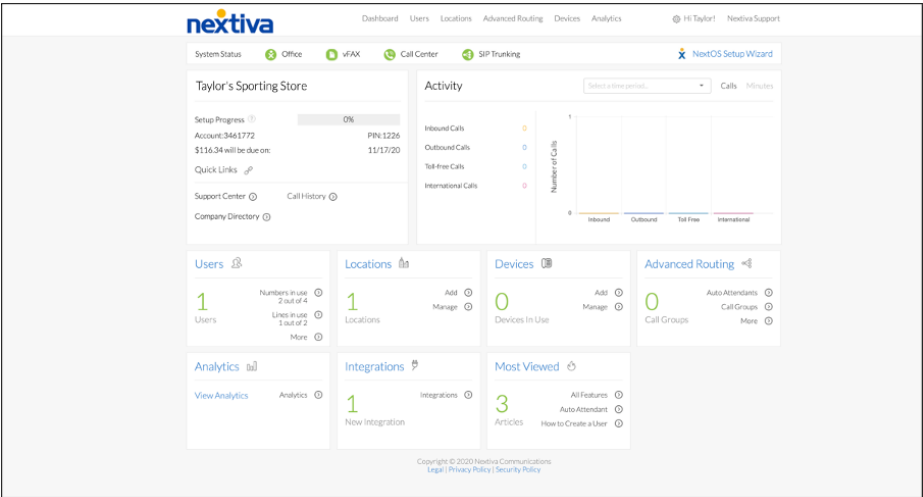
# Creating a Premium Call Center with the Call Center Wizard

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Choose the image that looks most like your screen once



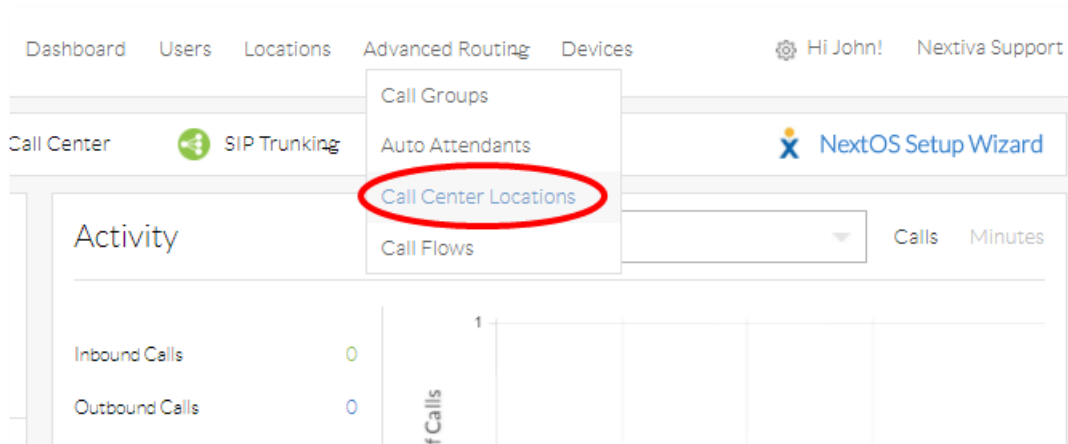
The Call Center Wizard is a convenient way to set up a Call Center, guiding you through initial setup, call routing, and assigning agents.

There are three types of Call Centers configurable through the wizard:

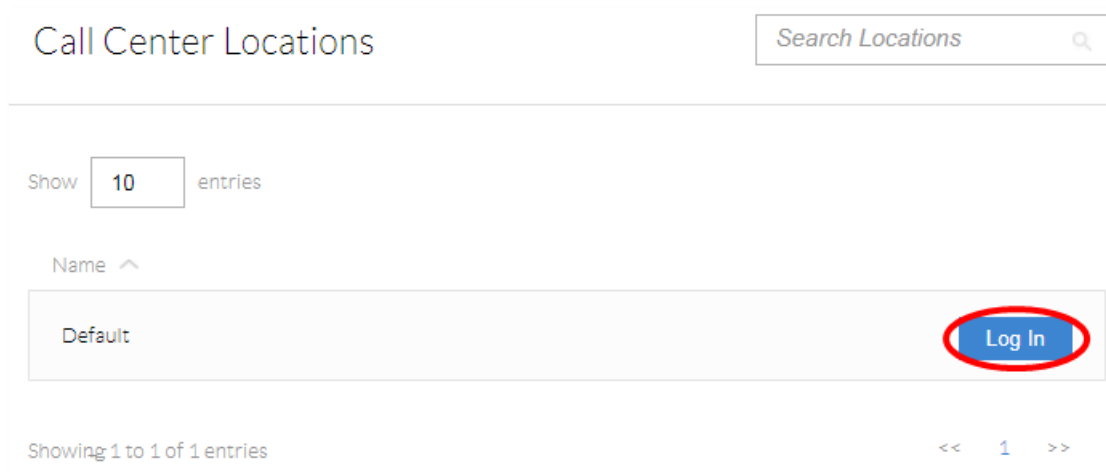
- **Call Queuing (Basic):** Comes with features like entrance announcement, call distribution policies and inbound call information. Voicemail and forwarding are also included features.
- **Call Center Pro (Standard):** Comes with all Basic features and ACD sign in and sign out functions, as well as additional support for optional features like call recording, and Supervisor Dashboard.
- **Call Center Enterprise (Premium):** Supports all features of Call Center, with advanced features like inbound DNIS, and silent monitoring.

## To Setup a Premium Call Center Through the Wizard:

From the Nextiva Voice Admin Dashboard, hover over **Advanced Routing**, then select **Call Center Locations**.



Select the **Log In** button on the location with Call Centers you wish to adjust.



Once the Configuration Portal launches in a new tab, select **Call Center** on the left Navigation Pane, then select **Call Centers** under the **Basic** column.

Options:

Profile  
Resources  
Services  
Service Scripts  
**Call Center**  
Calling Plan  
Utilities

## Call Center

### Basic

#### Call Centers

Automatically process incoming calls received by a single phone number by distributing them to a group of users or agents. Includes enhanced features such as agent log in and log out, call queuing, and overflow control.

You will see a list of Call Centers on the next page. To begin the Call Center Wizard, click the **Add Call Center Wizard** button.

## Call Centers

Create a new call center or manage existing call centers. You can configure a call center to allow agents to log in and cannot accept calls, and to provide music or video for callers on hold.

OK	Apply	Add Basic	Add Standard	Add Premium	<b>Add Call Center Wizard</b>
Active	Name	Type	Video		
<input checked="" type="checkbox"/>	Joe's Computer War...	Premium	✓		
<input checked="" type="checkbox"/>	Joe's Printer Ware...	Premium	✓		
OK	Apply	Add Basic	Add Standard	Add Premium	<b>Add Call Center Wizard</b>

Select the **Premium** radio button, then select **Next**.

## Call Center Setup : Select the Call Center Type

[Help](#) - [Close](#)

Create a new call center.

Cancel	Next >
<p>Call Center Type:</p> <p><input type="radio"/> Basic - Offers basic queuing capabilities</p> <p><input type="radio"/> Standard - In addition to offerings in Basic, this offers elements such as agent states, supervisors and reporting</p> <p><input checked="" type="radio"/> Premium - In addition to offerings in Standard, this offers features such as night service and other policies</p>	
Cancel	<b>Next &gt;</b>

The next screen will be the first of a five-step process to configure the new Call Center.

## Call Center Setup: Step 1 of 5 - Configure Call Center Profile

[Help](#) - [Close](#)

Create a new call center.

Cancel	Next >	Finish
<p>Call Center Type: Standard</p> <p>* Call Center ID: PremiumTest1 @ nextiva.com</p>		
<p>* Name: PremiumTest</p>		
<p>* Calling Line ID Last Name: Center</p>		
<p>* Initial Password: .....</p>		
<p>* Re-type Initial Password: .....</p>		
<p>Department: Call Center Department</p>		
<p>Language: English</p>		
<p>Time Zone: (GMT-07:00) US Arizona</p>		
<p>Network Class of Service: None</p>		
<p>Group Policy: <input type="radio"/> Circular <input checked="" type="radio"/> Regular <input type="radio"/> Simultaneous <input type="radio"/> Uniform <input type="radio"/> Weighted Call Distribution</p>		
<p>Bandwidth and QoS Settings</p>		
<p>Preferred announcement / music codec for external calls: None</p>		
<p>Preferred announcement / music codec for internal calls: None</p>		

- **Call Center ID:** This unique ID assists in routing calls. The Call Center ID needs to be alpha-numeric with no special characters and no spaces.
- **Name:** A friendly name for the Call Center.
- **Calling Line ID:** When someone calls the Call Center, this is the name displayed on the receiving Agent's device.
- **Initial Password:** This password will be used with third-party integration services. Must be 4 or more characters.
- **Department:** Gives Administrators the ability to departmentalize their phone system, a key component to Unity.
- **Language:** Currently English is the only language package Nextiva has available.
- **Time Zone:** Used for scheduling functions, reporting, and time-dependent call routing.
- **Routing Type:** Select one of the following options:
  - **Priority Based:** When an agent becomes available to receive a call, the call from the Call Center with the highest priority (determined by the Call Center Routing Policy page) is offered to the agent.
  - **Skill Based:** When an agent becomes available to receive a call, the call from the Call Center where the agent is most skilled is offered to the agent.
- **Group Policy:** How incoming calls will ring to agents. There are five different types to choose from:
  - **Circular:** Sends the calls to agents one at a time, moving down the list of agents until someone answers. The next call will start ringing the agent where the last call left off.
  - **Regular:** Rings the agents one at a time, always trying the agent at the top of the list and working its way down.
  - **Simultaneous:** Rings all of the agents at the same time.
  - **Uniform:** Agent phones ring one at a time in the order of idle time. The Call Center offers the next call to the agent who has been off the phone the longest.
  - **Weighted Call Distribution:** Assigns each agent a percentage. The Call Center will then try to distribute the calls based on the configured agent percentages.

Additional settings on this screen include:

**Call Center Settings**

Queue Length:  calls

☐ Enable video support

☒ Play ringing when offering call

☒ Allow callers to dial  to escape out of queue

☐ Reset caller statistics upon entry to queue

**Reporting Settings**

☐ Enable Call Center External Reporting

**Agent Settings**

☐ Allow agents to join Call Centers

☐ Allow Call Waiting on agents

☐ Enable calls to agents in wrap-up state

☒ Enable maximum ACD wrap-up timer:  :  (minutes:seconds)

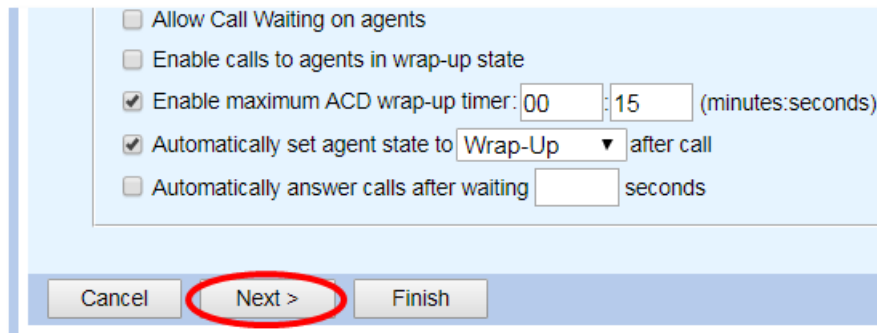
☒ Automatically set agent state to  after call

☐ Automatically answer calls after waiting  seconds

Cancel **Next >** Finish

- **Queue Length:** This limits the number of people that can wait in queue for an agent. Calls will follow overflow treatment when the queue length is reached. Basic Call Centers can have a maximum of 525 callers in queue.
- **Enable Video Support:** This feature is not supported.
- **Play Ringing When Offering Call:** Once an agent becomes available, the caller will hear ringing instead of hold music while the call connects.
- **Allow Callers to Dial “0”:** If a caller presses **0**, he/she will hear the Call Center voicemail. Configuring the Call Forwarding Busy option inside of the Call Center changes this option. When deselected, nothing will happen when the customer presses **0**.
- **Reset Caller Statistics:** Resets an internal timer that tracks how long a caller has been waiting in the queue when transferring calls from one Call Center to another using Overflow or Bounce routing policies.
- **Allow Agents to Join Call Center:** Call Center agents can join and remove themselves from their assigned Call Centers.
- **Allow Call Waiting on Agents:** Sends calls to agents who are already on a call.
- **Enable Calls to Agents in Wrap-Up:** Agents will still get calls, even in Wrap-up. Wrap-up is the time the agent has after each call before the next call.
- **Maximum Wrap-Up ACD timer:** The maximum amount of time after the end of a call before the agent is back in the queue.
- **Automatically Set Agent to State:** Administrators can choose between available, unavailable, and wrap-up.
- **Automatically Answer Calls After Waiting \_\_ Seconds:** Allows calls presented to agents to be answered automatically after the specified amount of time and rendered over an agent’s device speaker and microphone.

After filling out the required fields, select the **Next** button.



The screenshot shows a configuration window with the following settings:

- ☐ Allow Call Waiting on agents
- ☐ Enable calls to agents in wrap-up state
- ☒ Enable maximum ACD wrap-up timer: 00 : 15 (minutes:seconds)
- ☒ Automatically set agent state to Wrap-Up after call
- ☐ Automatically answer calls after waiting seconds

At the bottom, there are three buttons: Cancel, Next > (circled in red), and Finish.

Next, you will be presented with DNIS configuration settings. Configure the DNIS settings, if applicable, and click the **Next** button.

### Call Center Setup: Step 2 of 5 - Configure DNIS Parameters

Configure the call center DNIS to distribute calls to agents.

DNIS Display settings:

☐ Display DNIS Number to agent when presenting call instead of Calling Number  
☐ Display DNIS Name to agent when presenting call instead of Calling Name

DNIS Priority settings:

☒ Automatically promote calls with Priority 1 to Priority 0 after waiting  seconds  
☒ Automatically promote calls with Priority 2 to Priority 1 after waiting  seconds  
☒ Automatically promote calls with Priority 3 to Priority 2 after waiting  seconds

Name ▲	Phone Number
Marketing(Primary)	

To assign agents, click the **Search** button in the upper-right to show all of the agents in the **Group** that can take calls. Select the agents desired and click the **Add** button to move them from the **Available Agents** field to the **Assigned Agents** field. Click **Next** when finished assigning agents.

### Call Center Setup: Step 3 of 5 - Assign Agents

Configure the list of agents that belong to this call center. Users are available if they have been assigned an appropriate Call Center feature. Users with Call Center - Basic may be assigned to Basic call centers. Users with Call Center - Premium may be assigned to any call center.

Enter search criteria below

Available Agents

- Call Center,Joe (joe call center)
- Call Center,Stefanie (stefanie call center)

Assigned Agents

- Call Center,Stefanie (stefanie call center)

Next, you can assign supervisors to monitor agents. Click the **Search** button to bring up all of the users in the **Group** that can be assigned as supervisors. Select the desired user(s) and click the **Add** button to move them from the **Available Supervisors** field into the **Assigned Supervisors** field. Then click **Next**.

### Call Center Setup: Step 4 of 5 - Assign Supervisors

Configure the list of users who may supervise this Call Center.

Enter search criteria below

Available Supervisors

- Call Center,Charlie (charlie call center)
- Call Center,Joe (joe call center)
- Call Center,Katy (katy call center)
- Call Center,Levi (levi call center)
- Call Center,Matt (matt call center)
- Call Center,Sasha (sasha call center)
- Smith,John Q (john.q.smith)

Assigned Supervisors

- Smith,John (john.smith.admin)

From the drop-down field in the upper left-hand corner of the screen, select a supervisor. Select the **Search** button to the far right. A list of available agents to supervise is displayed in the **Available Agents** field. Select the agent(s) to supervise, then click the **Add** button in the middle to move them to the **Assigned Agents** field.

**Call Center Setup: Step 5 of 5 - Assign Agents to Supervisors**  
 Configure agents to be supervised. Available agents are any agent available currently not supervised and can include agents that are also supervisors.

Cancel < Back Finish

Step 1: Select a Supervisor  
 Supervisors: **Smith, John (john.smith.admin)**  
 john.smith.admin  
 Smith, John (john.smith.admin)  
 Smith, John Q (john.q.smith)

Step 2: Assign Agents  
 User ID: Starts With: Search

Step 3: Assign Agents  
 Available Agents: Call Center Sasha (sasha.call.center) >>  
 Assigned Agents: Call Center Stefanie (stefanie.call.center) >>  
 Add > Remove < Add All >> Remove All

Step 4: Save Changes Apply

Cancel < Back **Finish**

Click **Finish** to create the Call Center.

Cancel < Back **Finish**

To reach the Call Center, you will need to assign an extension or direct phone number. To do so from the main Call Center **Profile** screen at the **Group** level, select **Addresses**.

**nextiva**  
 Group > Call Centers : Marketing-Call-Center

**Options:**  
 ▶ **Profile**  
 Routing Policies  
 Calling Plans  
 Messaging  
 Utilities  
 Communication Barring

**Profile**  
**Basic**  
**Profile**  
 Display and configure profile information for this call center.  
**Addresses**  
 Display and configure information such as phone number, ex  
**Agents**  
 Configure the list of agents who may join this call center.

Select a phone number from the drop-down. The last four digits of the phone number may be automatically assigned as the extension. If you wish to change the extension, you may do that as well.

## Call Center Addresses

Addresses allows you to view and maintain your phone number and other identities that are used to make and receive calls.

OK Apply Cancel

Phone Number: None ▼

Extension: 9000

Aliases : sip: @ nextiva.com ▼

sip: @ nextiva.com ▼

sip: @ nextiva.com ▼

OK Apply Cancel

Your Call Center is now set up and configured! The next steps include configuring [Announcements](#) and having [Agents join the Call Center](#).

Download:

