



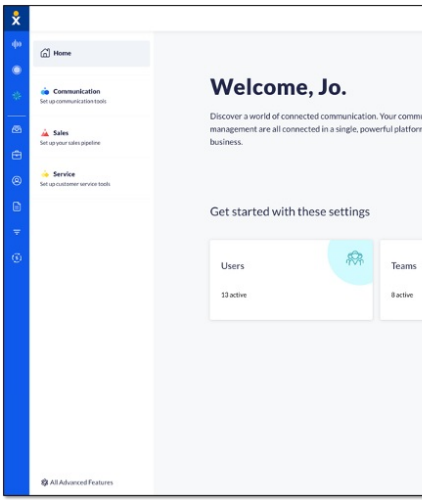
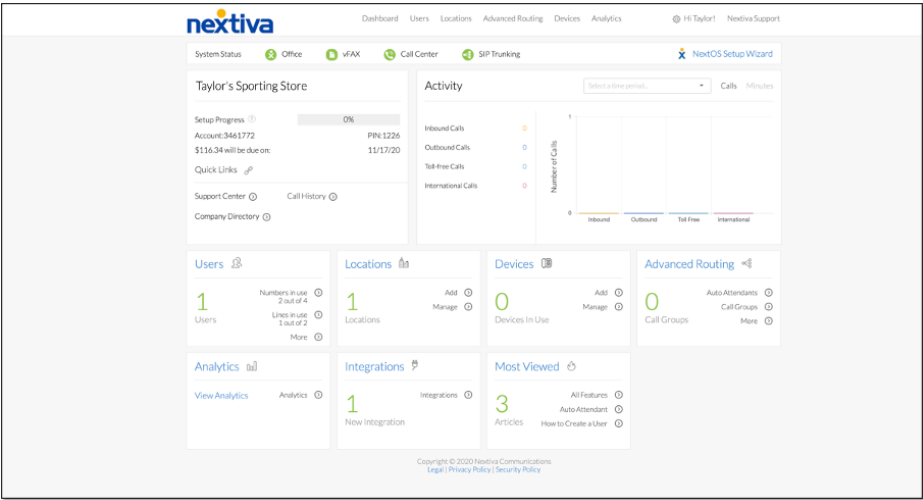
Creating a Standard Call Center with the Call Center Wizard

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Choose the image that looks most like your screen once



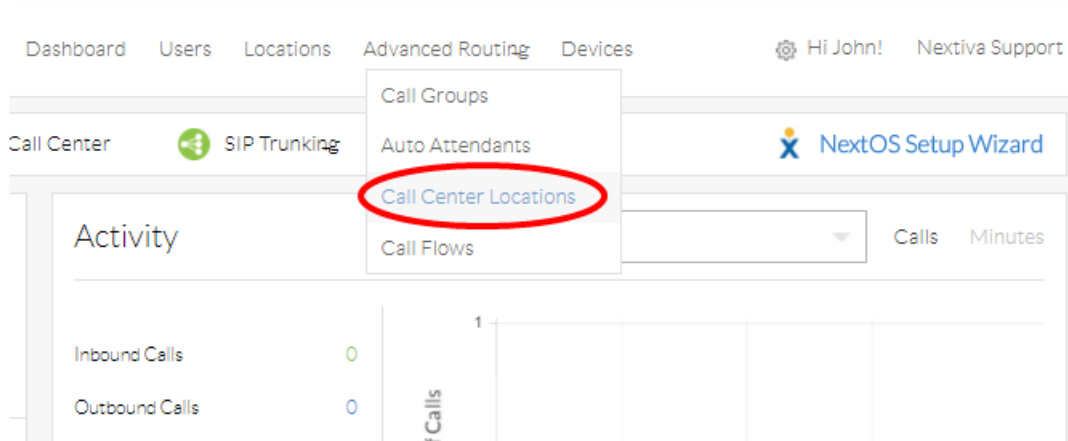
The Call Center Wizard is a convenient way to set up a Call Center, guiding you through initial setup, call routing, and assigning agents.

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

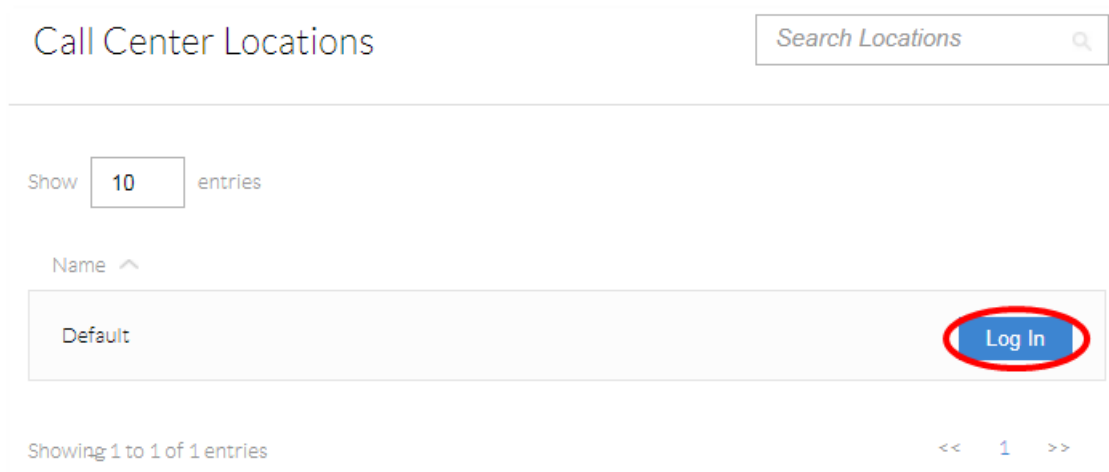
- **Call Queuing (Basic):** Comes with features like entrance announcement, call distribution policies and inbound call information. Voicemail and forwarding are also included features.
- **Call Center Pro (Standard):** Comes with all Basic features and ACD sign in and sign out functions, as well as 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 Standard 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 **Add Call Center Wizard**

Active	Name	Type	Video
<input checked="" type="checkbox"/>	Joe's Computer War...	Premium	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Joe's Printer Ware...	Premium	<input checked="" type="checkbox"/>

OK Apply Add Basic Add Standard Add Premium **Add Call Center Wizard**

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

Call Center Setup : Select the Call Center Type

Create a new call center. [Help](#) - [Close](#)

Cancel Next >

Call Center Type:

- ☐ Basic - Offers basic queuing capabilities
- ☒ **Standard** - In addition to offerings in Basic, this offers elements such as agent states, supervisors and reporting
- ☐ Premium - In addition to offerings in Standard, this offers features such as night service and other policies

Cancel **Next >**

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

Create a new call center. [Help](#) - [Close](#)

Cancel Next > Finish

Call Center Type: Standard

* Call Center ID: StandardTest1 @ nextiva.com

* Name: StandardTest

* Calling Line ID Last Name: Center * Calling Line ID First Name: Standard

* Initial Password: * Re-type Initial Password:

Department: Call Center Department Language: English

Time Zone: (GMT-07:00) US Arizona Network Class of Service: None

Group Policy: ☐ Circular ☒ **Regular** ☐ Simultaneous ☐ Uniform ☐ Weighted Call Distribution

Bandwidth and QoS Settings

Preferred announcement / music codec for external calls: None

Preferred announcement / music codec for internal calls: None

- **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.
- **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.
- **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

☒ Play ringing when offering call

☐ Reset caller statistics upon entry to queue

☐ Enable video support

☒ Allow callers to dial to escape out of 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

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 50 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.

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

This screenshot shows the 'Call Center Setup: Step 2 of 5 - Configure Addresses' form. It includes several checkboxes: 'Allow Call Waiting on agents', 'Enable calls to agents in wrap-up state', 'Enable maximum ACD wrap-up timer' (checked), 'Automatically set agent state to' (set to 'Wrap-Up'), and 'Automatically answer calls after waiting' (unchecked). The 'Next >' button is circled in red.

To reach the Call Center, you will need to assign an extension. Additionally, a direct phone number can be assigned to the call center so it can be reached from outside your organization

This screenshot shows the 'Call Center Setup: Step 2 of 5 - Configure Addresses' form. The 'Phone Number' dropdown is set to 'None' and the 'Extension' field contains '9000'. The 'Next >' button is circled in red.

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. The Agents move from the **Available Agents** field to the **Assigned Agents** field. Click **Next** when finished assigning Agents.

This screenshot shows the 'Call Center Setup: Step 3 of 5 - Assign Agents' form. It features a search bar at the top right with the 'Search' button circled in red. Below, there are two lists: 'Available Agents' and 'Assigned Agents'. In the 'Available Agents' list, 'Call Center, Sasha (sasha call center)' is selected and circled in red. The 'Add >' button is also circled in red.

Next, you can assign supervisors to monitor agents. Click the **Search** button to bring up all of the Agents in the

Group that can be assigned as supervisors. Select the Agent(s) desired and select the **Add** button. The employee(s) move from the **Available Supervisors** field into the **Assigned Supervisors** field. Then click **Next**.

The screenshot shows the 'Call Center Setup: Step 4 of 5 - Assign Supervisors' interface. At the top, there are navigation buttons: 'Cancel', '< Back', 'Next >', and 'Finish'. Below this is a search bar with a 'User ID' dropdown and a 'Starts With' text input. A 'Search' button is circled in red on the right. The main area is divided into two columns: 'Available Supervisors' and 'Assigned Supervisors'. In the 'Available Supervisors' list, 'Smith, John Q (john.q.smith)' is selected and circled in red. In the middle, the 'Add >' button is circled in red. The 'Assigned Supervisors' list on the right currently contains 'Smith, John (john.smith.admin)'. At the bottom, the 'Next >' button is circled in red.

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.

The screenshot shows the 'Call Center Setup: Step 5 of 5 - Assign Agents to Supervisors' interface. At the top, there are navigation buttons: 'Cancel', '< Back', and 'Finish'. Below this is a 'Supervisor' dropdown menu with 'Smith, John (john.smith.admin)' selected and circled in red. The main area is divided into two columns: 'Available Agents' and 'Assigned Agents'. In the 'Available Agents' list, 'Call Center Sasha (sasha.call.center)' is selected and circled in red. In the middle, the 'Add >' button is circled in red. The 'Assigned Agents' list on the right currently contains 'Call Center Stefanie (stefanie.call.center)'. At the bottom, the 'Finish' button is circled in red.

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

This is a close-up screenshot of the bottom navigation bar of the interface. It contains three buttons: 'Cancel', '< Back', and 'Finish'. The 'Finish' button is circled in red.

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