



Call Center Setup Process

Getting Started

Overview

Since you've completed your Welcome Call, your Implementation Manager will guide you through the rest of the onboarding process. Now it's time to start thinking about how you would like your phone system to be set up. Ask yourself the questions below. Involve anyone that will be included in your phone system setup. This will get you thinking about how incoming calls route to the correct Auto Attendants, Call Centers, and Agents.

What Auto Attendants do I need?

An auto attendant is a personalized message that gives callers options geared towards your business and departments. Here they can make their own selection to be automatically transferred to the correct person or call group. Think about the different options you would like to provide your callers.

What schedules do I need?

Schedules give you the option to change your call flow based on your business hours. You can schedule lunch breaks, meetings, or even holidays!

Call Routing & Messages for Your Call Center

- Who will be in the queue and who will be the Supervisor?
- How long do you want a caller to wait for an agent to answer?
- Where do you want the call sent if not answered?
- What kind of messages and hold music do you want callers to hear?
For example, entrance, comfort, or marketing messages.