

# The Nextiva 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.

## Call Routing & Schedules

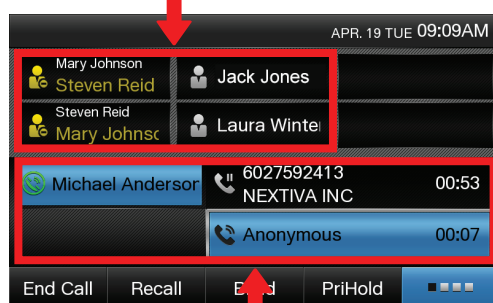
Ask yourself the questions below, and involve anyone that will be included in your phone system setup. This will get you thinking about how incoming calls route to the correct Auto Attendants, Call Groups, and employee(s).

- **What Call Groups do I need?** A Call Group gives you the ability to ring a group of users simultaneously or one at a time. You can use this to group users' extensions together into departments and specific groups.
- **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!

## Device Line Setup

Depending on the make and model of the phone (often referred to as a "device"), you have the option to mirror the line, as well as monitor the lines of other users.

Busy Lamp Field (the ability to see the presence of the other people on calls)



Line mirroring (line appears twice on phone)

## Call Flows

Please be prepared to discuss the call flow for each phone number for your business. Here are some examples to consider:

### Example #1

When callers dial your main number, it rings a live receptionist who disperses calls manually.



### Example #2

When callers dial your main number, a recorded Auto Attendant greeting plays with selections the caller can choose from to be routed automatically.

