How to Set Up a Call Center

This tutorial will help you set up a small call center using an IVR extension and Queue extensions.

- Why set up a call center
- Requirements
- Setup
- Tips and tricks

Why set up a call center

When the number of calls grows to the point where they cannot be handled by a single person and must be routed toward a specialized department, it is recommended that you set up your own call center.

Suppose you have a small business and your staff is split into several departments: Sales, Support, Marketing, etc. A call center will have calls from customers automatically reach each of these departments and no third-party such as the secretary will have to manually transfer them.

Requirements

To set up a call center, you will need:

- an IVR extension, which will do your secretary's work
- a queue extension for each department in your business (i.e. Sales, Support, Marketing, etc.)
- phone terminal extensions for the people in each department; they that will act like agents (i.e. John, the account manager; Tom, the support engineer; Ann, the communication specialist, etc.)

Assuming you have already defined your Service Provider, Organization and User accounts, make sure you have configured the **Maximum number of IVR extensions** and the **Maximum number of Queue extensions**. Here's how you can do it.

Setup

Once you set up these two limits, follow the steps below. Each of these steps is explained in a distinct tutorial.

1. Set up an IVR extension. When customers call your company, all of their calls will be taken over by this IVR extension, which will distribute them to the queues.
2. Configure the Queue extensions as explained here. You will attribute a separate Queue extension to each department in your company: one for Sales, one for Support, one for Marketing, etc.
3. Define Local agents and Remote agents.

Each department has its own staff. This means that each queue extension has its own agents; it depends on how many people work in each department. For instance, if you want 5 people in the Sales Department to take the calls, then the Sales queue will have 5 agents. Each agent requires a separate setup, which among others takes into consideration their location. If they're in the office, you need to define them as local agents. Suppose two of your Sales people are out of office, they will still be able to take calls. Simply define them as remote agents.

To better understand how the IVR works and get an overall idea, it is recommended that you go through the most common IVR use cases.

Tips and tricks

If you have several agents working in shifts, instead of configuring a phone or a line for each of them, you can enable extension virtualization. That way any phone can be used by any agent. We have already published a tutorial explaining how to virtualize an extension as well as some practical examples.

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