Phone Line Setup SOP

Purpose

To establish a standardized procedure for provisioning, configuring, and troubleshooting phone lines for new or existing users using Nextiva VoIP services. This SOP applies to all internal IT personnel responsible for managing telephone systems, including desk phones and mobile app usage.

1. Procedure
2. Upon request for a new phone line or reassignment, log in to the Nextiva Admin Portal and navigate to **Users > Add User**.
   1. Enter required information, including name, email, extension, caller ID name, etc.
   2. Assing license or seat.
   3. Assign the user to the appropriate location and user group, if applicable.
   4. Link user to the correct extensions or direct dial number (DID) based on site or department.
3. For assigning desk phones:
   1. Locate and assign available device from inventory.
   2. Update MAC address in the Nextiva portal.
   3. Factory reset the phone and plug it into the network.
   4. Wait for provisioning to complete and test inbound/outbound calls.
4. For assigning mobile phones:
   1. Enable Nextiva App access in the user’s account.
   2. Send the login credentials and download instructions to the user via secure message.
   3. Confirm user login and app configuration.
5. Enable voicemail and set the voicemail-to-email option.
   1. Add the user’s email address for voicemail delivery.
   2. Configure call forwarding rules, including but not limited to, business hours routing, after-hours voicemail or alternate contact, or call group membership.
6. Record assigned number/extension, device serial or MAC address, location, and user in InvGate asset inventory.
7. Note setup completion in the internal ticketing system, including date of setup, name of technician, and any configuration notes.
8. Enforce strong passwords and MFA (if available).
9. Disable account immediately upon termination (refer to Termination of Employee SOP).
10. Review call and voicemail access during quarterly IT audits.
11. Troubleshooting Guide

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| Phone won’t provision | * Check network cable/power * Confirm MAC address is correct * Restart device |
| No dial tone | * Verify Nextiva registration * Check SIP trunk status * Reboot and reassign line |
| Voicemail not working | * Check voicemail settings * Reset mailbox * Confirm email forwarding |
| App login issues | * Resend login invite * Confirm license assignment * Revoke and re-provision user |
| Poor audio quality | * Test network speed * Switch to wired connection * Open firewall ports per Nextiva |
| Incoming call not routing properly | * Review call routing rules and call groups * Check for user overrides |

This SOP must be reviewed annually or when major system changes occur in Nextiva, internal phone policies, or organizational structure.