



Full Service Onboarding

Please fill out the following guide, which will ask details about your current phone system/ service for successfully migrating over to your new SimpleVoIP phone system. Please have the following information ready for your Implementation kickoff call.

Your Name:

Location Name:

Address:



Question #1. When is your go-live date?

The go-live date is the target date that you want your **SimpleVoIP** phone system up and running for your location. We will ship your new phones approximately 1 week prior. Billing and term begins the day phones are shipped or service is activated.

Your go-live date target is (DD/MM/YYYY) _____

Useful information you may want to share:



Question #2. How many users are we going to migrate to SimpleVoIP?

"Users" are the employees or locations who will be assigned a phone extension. We will need their email addresses (only for people) and intended extension number(s). Normally, extensions are 3 or 4 digits (e.g., Ext. 101 or 1001). For restaurants or retail stores these "users" are typically called "Host Stand", "Office Manager" or "Bar Cordless".

Please indicate whether their extension will be for a "hard" phone type—a Yealink phone with a dedicated line—or a "soft" phone type—an app on a desktop or mobile device. If using a hard phone type, list the model number, typically found on the back of the phone. **If you have more than 10 phones please make additional copies of this sheet.**

	First name	Last name	Email address	Ext #	Phone type	Model #
Ex	Host	Stand	n/a	201	Desktop	Yealink T43U
Ex	Jill	Admin	jill@simplevoip.com	202	Cordless	Yealink W60/W56H-
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

Other user information you may want to share. If you are bringing your own phones (BYOD) please provide all the MAC addresses.



Question #3. Moving your current phone numbers to SimpleVoIP (number transfer or porting)

Number transfer or porting will enable you to keep your existing business numbers on your new SimpleVoIP phone system. We will also walk you through the number 5-10 day transfer process during our one-on-one session.

Information required for transferring numbers:

What business phone numbers do you want to move to your new SimpleVoIP platform?

Please attach a recent phone bill that shows the address and all phone numbers you want to port.

The business phone numbers can be a mix of your main office, fax, and direct numbers that go to extensions, etc. **Please verify you are NOT porting fire, burglar alarm or elevator lines or lines shared with DSL.** List them all below:

Number	Description (main office number, fax number, direct number)
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

- Who is your current phone provider? _____
- Who is your company's authorized representative on your current phone service (whose contact info is on the bill)? _____

- When do you want to port these numbers?
 - ASAP - After install
 - Requested Date



Question #4. Business hours: What time do you expect clients to call in?

Your operating hours need to be identified so we can input this in the SimpleVoIP phone system. You can choose different greetings and forwarding rules inside and outside business hours.

Business hours information

	Business hours (open for business) <i>Ex. 8 a.m. –5 p.m.</i>	Holidays - open/closed/special menu <i>Ex. New Years - closed</i>
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		
Sunday		

Other user information you may want to share:



Question #5. How do you want callers to be greeted and transferred?

This is the first thing your callers will hear when they reach your business. If you don't want a professional menu system you can opt to have all (or some) phones ring and then go to voicemail. The system can route calls differently when you're open, closed or on a pre-programmed holiday.

Example Call Flow (OPEN HOURS):

SimpleVoIP will answer and play the announcement (sample greeting below):
"Welcome to Latte Larry's. To place an order for delivery or carryout, press 1. To get our hours and address sent to you via text message, press 2. For our catering team, press 3. For our store manager, press 4 or just stay on the line."

Example Options:

- Ring all phones for 60 seconds, or forever
- Go to Voicemail
- Play a greeting
- Send a text message with store hours, address or both
- Send a text message with a link to your menu or ordering app - Ring some phones and prepend a note like "To Go"
- Read text to speech
- Redirect the caller to a phone number (cell, another store, etc)

NOTE: If you don't want a menu system select "Ring All"

Store Open

Store Closed

Holidays

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 0
- *

Timeout

Menu Greeting Selection

Menu Greeting Selection

Menu Greeting Selection

Menu Greeting Text

Menu Greeting Text

Menu Greeting Text

Other user information you may want to share (attach a diagram if needed):

Question #6. Who is installing your phones?

New VoIP phones will arrive "Plug & Play" and pre-programmed. If you have to move old phone lines around or punch down connections in the back room we recommend Professional Installation . This is most common when using an ATA (analog adapter) with your existing analog phones.

Question #7. Who will prepare your location for VoIP?

It's very important to prepare you network and ISP for VoIP to ensure good quality calls. Please refer to our guide at <https://support.simplevoip.us> by searching for "Network".

The voice quality of the SimpleVoIP service is dependent on the quality of your network. Available bandwidth, quality, and reliability of your local area network and internet service directly affect the voice quality of this service. To experience reliable, high-quality voice calls, please ensure that there is available network bandwidth of at least 100 Kbps download and 100 Kbps upload for each phone, or twice that if you prefer to use our HD quality CODEC. Please take the time to prepare your network for optimal VoIP experience by following our guide located at <https://simplevoip.zendesk.com/hc/en-us/articles/360046499174-Prepare-your-Network-for-VoIP> (or search <https://support.simplevoip.us> for "network")

Full Service Onboarding Call Agenda

Once you submit this **completed document** to our onboarding team we will reach out to schedule a 30 minute call to make sure we understand exactly what you're looking for. We will cover the following on the call:

- Requested due dates and lead time
- Review the porting process, what's involved and how long it takes
- Phone system setup, including names, locations and types of handsets
- Store hours and holidays
- Main phone number routing and your Auto Attendant (Virtual Receptionist)
- Confirm the phone and license counts are accurate
- Determine what additional services you need activated (eFax, conference bridge, mobile app, curbside SMS)
- Network, ISP and cabling - site readiness
- Discuss installation options
- How to get help: Support website, chat and ticketing system