



Full-Service Onboarding Form

Please complete this form before your implementation kickoff call to provide details about your current phone system/service so we can successfully migrate you to your new SimpleVoIP phone system.

Company Information

Company Name:

Address:

Company Number:

Current Phone System Information

Do you currently have a phone service provider? (Yes/No)

If yes, who is your current phone service provider?

How many phones, phone lines, and extensions do you currently have?

Do you have direct numbers for your users?

What additional services, aside from phone services, does your company use? (e.g., softphones/mobile app, faxing, Microsoft Teams integration, etc.)



Service Requirements

When is your go-live date?

The go-live date is when you want your SimpleVoIP phone system to be up and running at your location. We will ship your new phones approximately one week prior. Billing and term begin the day phones are shipped or service is activated.

Useful information you may want to share:

How many users are we going to migrate to SimpleVoIP?

Users are employees or locations that will get a phone extension. We need their email addresses (for people) and their intended extension numbers. Extensions are usually 3 or 4 digits (e.g., Ext. 101 or 1001). In places like restaurants or retail stores, these users might be labeled as "Host Stand," "Office Manager," or "Bar Cordless."

Please tell us if the extension will be for a "hard" phone (a Yealink phone with a dedicated line) or a "soft" phone (an app on a desktop or mobile device). For hard phones, please include the model number, which is usually found on the back of the phone.

EXAMPLE

First Name	Last Name	Email Address	Extension Number	Phone Type	Model Number
Host	Stand	N/A	201	Desktop	Yealink T43U
Jane	Doe	jill@simplevoip.com	202	Cordless	Yealink W60
John	Doe	john@simplevoip.com	203	Cordless	Yealink W56H



How many users are we going to migrate to SimpleVoIP?

First Name	Last Name	Email Address	Extension Number	Phone Type	Model Number

***If you have more users than the fields listed on this page please follow this format and send an excel sheet with all users and their information.**



Please provide any user information you'd like to share. If you'd like to use your own phones or devices, please provide all the MAC addresses.

Information Required for Transferring Numbers

You can keep your current business numbers on your new SimpleVoIP phone system through number transfer or porting. We will guide you through the 5-10-day transfer process during a one-on-one session.

Please list the business phone numbers you want to move to your new SimpleVoIP platform. If you have more phone numbers than the fields below, please attach an Excel spreadsheet in the same format with the additional phone numbers.

Number	Description (e.g., Main Office Number, Fax Number, Direct Number)

Please verify that you are not transferring fire alarms, burglar alarms, elevator lines, or lines used with DSL (Digital Subscriber Line) internet.



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

When do you want to port the numbers you listed in the previous page?

As soon as possible after installation

Request a date:

Business Hours

What time do you expect customers to call?

Please provide your operating hours so we can set them up in the SimpleVoIP phone system.

Day	Business Hours (e.g., 8 AM - 5 PM)
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	
Sunday	

Other useful information you may want to share:



Holiday Hours

Please let us know if you are open or closed on the following federal holidays and any additional holidays when you will be open or closed.

Holidays	Please specify if you are open or closed
New Year's Day	
Martin Luther King, Jr. Day	
President's Day	
Memorial Day	
Juneteenth	
Independence Day	
Labor Day	
Columbus Day	
Veterans Day	
Thanksgiving Day	
Christmas Day	



Greetings and Callflows

Your greeting is the first thing your callers will hear when they contact your business on your menu system. Check the box below if you ordered an auto-attendant.

I ordered an auto-attendant

If you ordered an auto-attendant, please choose how you'd like your customers to be greeted when they call your number.

Open	Closed

If you chose text-to-speech, please type the menu greeting you'd like the auto-attendant to say.

Open	Closed



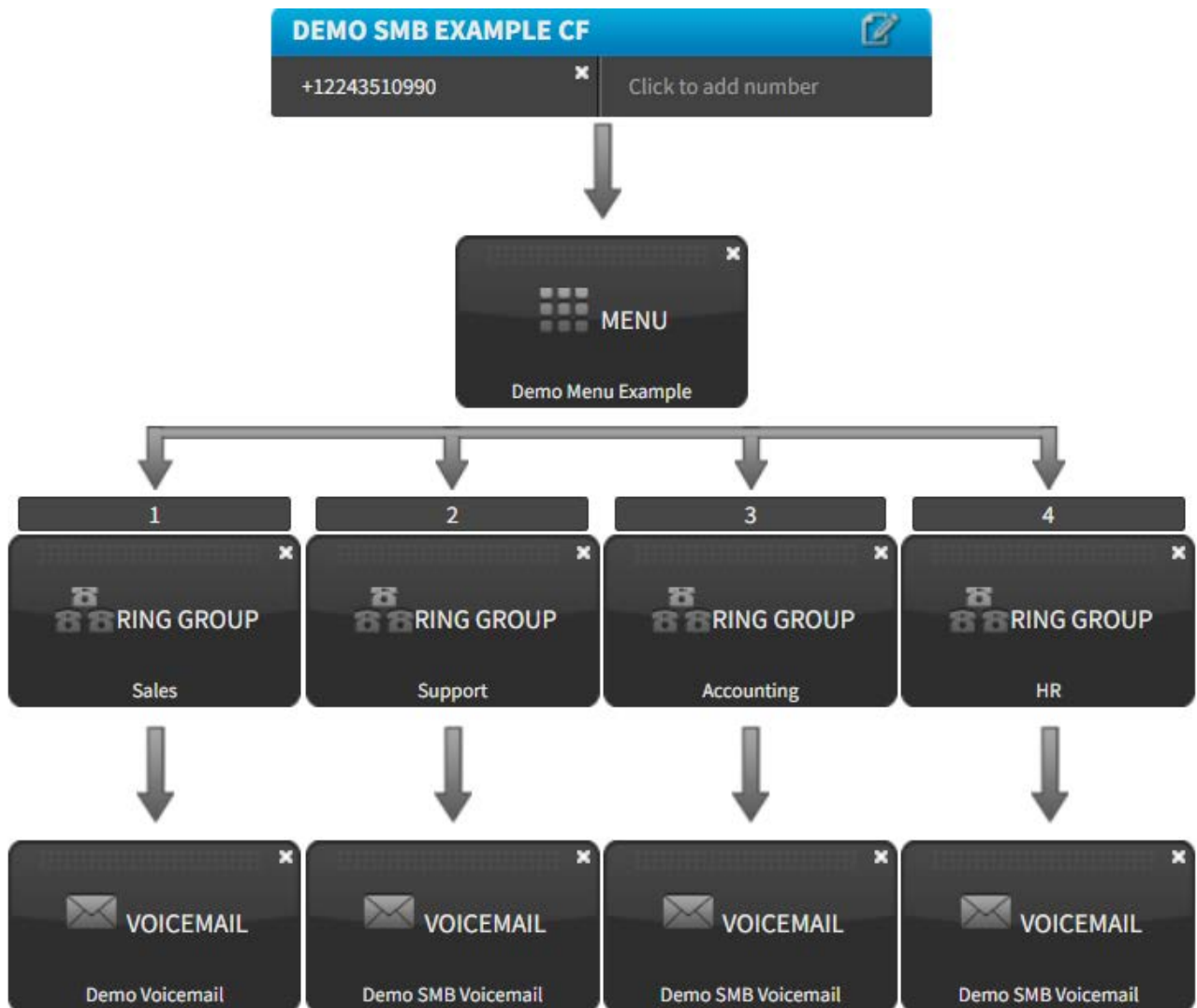
Example Call Flow Options:

- Play a recorded greeting
- Text-to-speech greeting
- Play an MP3 file
- Ring all phones for 60 seconds or until answered
- Redirect the caller to a phone number
- Go to voicemail
- Send a text message with store hours, address location, or both
- Send a text message with a link to your menu

EXAMPLE TEXT CALL FLOW

“Welcome to Demo SMB Example CF. To talk to Sales, press 1. To speak to Support, press 2. To be directed to our Accounting department, press 3. To speak to HR, press 4.”

EXAMPLE IMAGE CALL FLOW





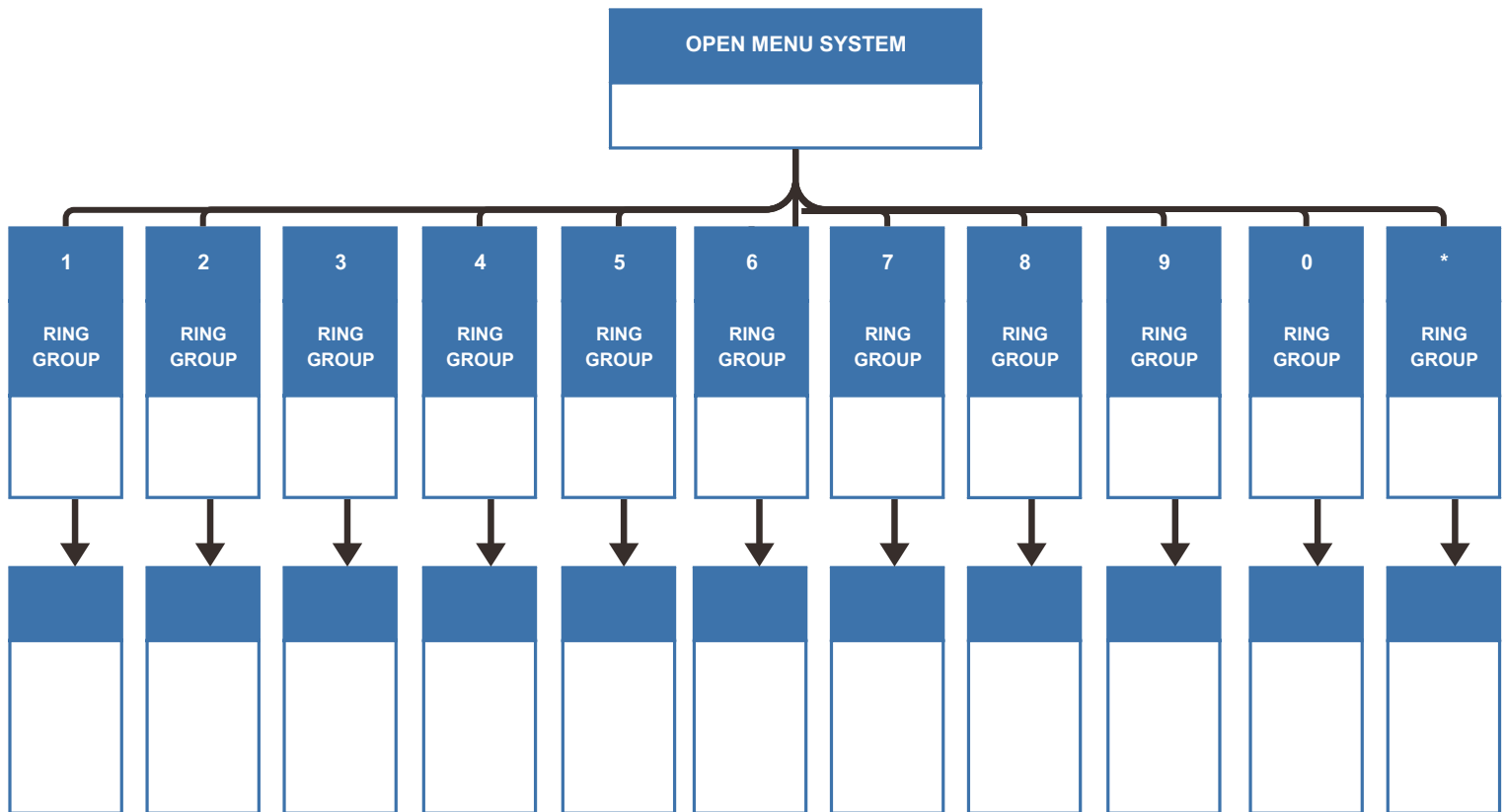
Let's Build Your Call Flow!

Please use the previous example image to show us how you'd like your call flow to work. If your call flow is more complex, feel free to attach a diagram or check the box below, and we can discuss it with you in a one-on-one session.

I'd like to discuss this during a one-on-one session.

Please only fill this out if you ordered an auto-attendant.

If you'd like to give it a try, please use the diagram below to show us how you'd like your menu system to work during your business's open hours.



Please share your thoughts or provide helpful information to assist us in understanding your call flow needs.



Installation

Who will install your phones?

New VoIP phones will arrive pre-programmed and ready to use ("Plug & Play"). If you need to move old phone lines or make connections in the back room, we recommend professional installation. This is especially common when using an ATA (analog adapter) with your existing analog phones.

- Self-Installation
- SimpleVoIP Professional Installation
- Third-Party Networking Company

Who will prepare your network for VoIP?

It's very important to prepare your network and Internet Service Provider (ISP) for VoIP to ensure good quality calls. Please refer to our articles at <https://support.simplevoip.com>

- Self-Preparation
- SimpleVoIP Network Optimization
- Third-Party Networking Company

The voice quality of the SimpleVoIP service depends 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 each phone has available network bandwidth of at least 100 Kbps download and 100 Kbps upload, 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](https://simplevoip.zendesk.com/hc/en-us/articles/360046499174-Prepare-your-Network-for-VoIP) (or search [https:// support.simplevoip.us](https://support.simplevoip.us) for "network")



Full Service Onboarding Call Agenda

Once you submit this **completed document** to our onboarding team, we will schedule a 30-minute call to understand your needs. During the call, we will cover:

- Requested due dates and lead time
- The porting process, including 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)
- Confirming the phone and license counts are accurate
- Additional services you need activated (eFax, conference bridge, mobile app, curbside SMS)
- Network, ISP, and cabling site readiness
- Installation options
- How to get help: support website, chat, and ticketing system

*We look forward to
working with you,*

