

Dear Valued FreedomVoice Customer,

Thank you for your decision to implement the advanced FreedomVoice Hosted VoIP Phone System in your business. We feel confident that you have chosen the best Hosted IP-PBX on the market and that it will serve you well for years to come. We have developed a proven set of processes and procedures to insure a successful installation, and look forward to the opportunity to work with you on this project. We understand that a phone system is the lifeblood of any business and that an implementation of this type is not a frequent event for most customers. We bring to you a vast array of resources and industry experience to help insure the best configuration for your needs and a smooth transition.

We believe that all successful installations share a common trait: good planning. To help aid us in this process, we have developed a detailed “Configuration Workbook” that outlines all aspects of the phone system programming options. **We cannot over emphasize the importance of being well prepared for your initial “Pre-Installation Configuration Meeting” with your FreedomVoice Partner.** Please thoroughly review the attached “Configuration Workbook” in advance of this meeting and complete as much general information as possible. While likely overwhelming, the intention of providing you with these materials in advance is to get you thinking about the various options available with your new phone system and to help us jointly brainstorm ways to make your business operate better and with more efficiency. Also, please be prepared with the requested items set forth in the “Customer Checklist” (section 9), namely details relating to your phone lines and extensions, and a detailed floor plan.

From this configuration workbook through to the final on-site implementation, your assigned FreedomVoice Partner should be your single point of contact. This individual is responsible for coordinating all of the details and scheduling related to your installation.

Sincerely,

**FreedomVoice**

**Customer Workbook**

|  |
| --- |
| **Section 1: Basic Information**  |
| **Partner Information** |
| Partner Name: |  |
| Partner Address: |  |
| Partner Phone #: |  | Fax #: |  |
| Partner/Agent/Rep: |  | Email: |  |
| Account Manager: |  | Email: |  |
| Project Manager: |  | Email: |  |
| Technical Support: |  | Email: |  |
| Billing Inquiries: |  | Email: |  |
| **Customer Information** |  |  |
| Company Name: |   |  |  |
| D-U-N-S #: |  | Account #:  |  |
| Website URL: |  | Year Started: |  |
| Billing Address: |  |
| Billing Phone #: |  |  Billing Fax #: |  |
| Installation Address: | [ ]  Same as Billing Address (otherwise add Installation Address below) |
| Installation Phone #: |  |  Installation Fax: |  |
| E911 Address: | [ ]  Same as Installation Address (otherwise add E911 Address below) |
| Contact Name #1: |  | Email: |  |
| Contact Title: |  | Phone #: |  |
| WebLink Account: | [x]  Administrator [ ]  User | Cell #: |  |
| Username: |  | Password: |  |
| Contact Name #2: |  | Email: |  |
| Contact Title: |  | Phone #: |  |
| WebLink Account: | [ ]  Administrator [ ]  User | Cell #: |  |
| Username: |  | Password: |  |
| Contact Name #3: |  | Email: |  |
| Contact Title: |  | Phone #: |  |
| WebLink Account: | [ ]  Administrator [ ]  User | Cell #: |  |
| Username: |  | Password: |  |
| Technical Contact: |  | Email: |  |
| Contact Title: |  | Phone #: |  |
| WebLink Account: | [ ]  Administrator [ ]  User [ ]  None | Cell #: |  |
| Username: |  | Password: |  |
| **FreedomVoice Platform Configuration** |
| Configuration:  |  |
| Phone Models: | [ ]  IP-650 [ ]  IP-550 [ ]  IP-501 [ ]  IP-450 [ ]  IP-330 [ ]  IP-4000 [ ]  Cisco WIP [ ]  Linksys-942 |
| # of System Numbers: |  | Trunks Lines: |  |
| Subscriber Lines: |  | Extensions: |  |
| Individual DID’s: |  |
| Call Recording: |  |
| Default Time Zone: | [ ]  Pacific [ ]  Mountain [ ]  Central [ ]  Eastern [ ]  Other:  |
| Customer Care: | [ ]  Standard Support (800# and Email, M-F, 6:00 am – 6:00 pm PST)  |
|  |  |
| **3rd Party Peripherals & Analog Devices** (if applicable) |
| Music On Hold Audio:  | [ ]  Default Music[ ]  Upgrade Music ($10/mo)[ ]  Customer Provided Audio File |
| Overhead Paging: | [ ]  Yes[ ]  No | [ ]  Existing[ ]  New | [ ]  Audio Out Connection Port[ ]  Trunk Connection Port[ ]  Extension Connection Port | Manufacturer:Model:Zones: |  |
| Alarm System:  | [ ]  Yes[ ]  No | [ ]  Modem[ ]  No Modem | [ ]  Credit Card Terminals[ ]  No Credit Card Terminals |
| Overhead Ringer: | [ ]  Yes[ ]  No | [ ]  Satellite[ ]  Other: | [ ]  Door/Gate Entry System[ ]  No Door/Gate Entry System |
| Inbound Faxing:  | [ ]  Analog Line[ ]  Analog Terminal Adapter (ATA)[ ]  Port # to FreedomVoice (E-Fax) |
| Outbound Faxing: | [ ]  Analog Line[ ]  Analog Terminal Adapter (ATA)[ ]  Port # to FreedomVoice (E-Fax) |

|  |
| --- |
| **Section 2: Site Survey & VoIP Network Configuration** |
| **Site** |
| Internet Access:  | [ ]  Fiber [ ]  T1+ (Internet Only) [ ]  T1+ (Dynamic) [ ]  DSL [ ]  Cable [ ]  Other: |
|  | Internet Dedicated for Voice: [ ]  Shared: [ ]  |
| ISP/Carrier: |  | ISP Contact:  |  |
| ISP Phone: |  | ISP Email:  |  |
| On Site IT: | [ ]  Yes [ ]  No  | IT Contact Name: |  |
| IT Contact Email: |  | IT Contact Phone: |  |
| Advertised Bandwidth: |   |
| Modem Make/Model: |  | [ ]  Customer Provided [ ]  ISP Provided/Managed  |
| Router Make/Model: |  | [ ]  Customer Provided [ ]  ISP Provided/Managed [ ]  FreedomVoice Provided |
| Firewall Make/Model: |  | [ ]  Customer Provided [ ]  ISP Provided/Managed [ ]  FreedomVoice Provided |
| Switch Make/Model: |  | [ ]  Managed [ ]  Unmanaged (Check Only 1 Option) |
| # of Switch Ports: | [ ]  48 [ ]  24 [ ]  Other:  | [ ]  Power-over-Ethernet (POE) |
| IP Addresses: | [ ]  DHCP (Default) [ ]  Static | External IP Address of Router: |
| Internal IP Address Block used: |  |
| **Speed Test(Morning, Noon, Night)** |
| FVS Speed Test #: |  | FVS Speed Test #: | FVS Speed Test #: |
| Test Date: |  | Test Date: | Test Date: |
| Jitter Result: |  | Jitter Result: | Jitter Result: |
| Packet Loss: |  | Packet Loss: | Packet Loss: |
| MOS Score: |  | MOS Score: | MOS Score: |
| Download Speed: |  | Download Speed: | Download Speed: |
| Upload Speed: |  | Upload Speed: | Upload Speed: |
| Quality of Service: |  | Quality of Service: | Quality of Service: |
| RTT (MS/latency): |  | RTT (MS/latency): | RTT (MS/latency): |
| **Wiring** |
| Current Wiring Plan: | [ ]  RJ-45 Dual Drops [ ]  RJ-45 Single Drops [ ]  Other:  |
| Wiring/Jacks: | [ ]  Existing [ ]  New | Install Additional Drops? [ ]  Yes [ ]  No | Quantity:  |
| Number of Additional Devices On this Network: |  | Will phones be on the same VLAN as the computers? [ ]  Yes [ ]  No | If No, VLAN of Phones: |
| Multi-Site Install?  | [ ]  Yes [ ]  No | If Multi-Site, additional Surveys attached?[ ]  Yes [ ]  No |  |
| **Phones** |
|  | Where were the Phones purchased? [ ]  FreedomVoice [ ]  Customer using Existing phones  |
|  | [ ]  Other: |
|  | If not purchased from FreedomVoice, list make/model of said devices: |
|  |  |
|  |  |
|  |  |

***NOTE: Customer is solely responsible for engineering, configuration, management, troubleshooting and support of LAN and WAN connectivity. Call quality can never be guaranteed when using the public internet.***

**Site Survey & VOIP Network Configuration**

**Site**

Site Location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  Main Location, [ ]  Secondary Location

Will this be a multi-site installation? [ ]  Yes, [ ]  No (If yes, please attach a Site Survey for each location)

IT Contact: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  Onsite, [ ]  Offsite, [ ]  Third Party

IT Contact Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ IT Contact Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Internet Connection**

Internet Access:

[ ]  Cable, [ ]  DSL, [ ]  Fiber, [ ]  MPLS, [ ]  T1, [ ]  Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Advertised Bandwidth: Download Mbps\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Upload Mbps\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ISP**/**Carrier: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ISP**/**Carrier Contact: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ISP**/**Carrier Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ISP**/**Carrier Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Will the internet connection be dedicated for voice? [ ]  Yes, [ ]  No

If no, how many other devices will share this same internet connection? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Use the “FreedomVoice Bandwidth Calculator” sheet from Weblink to properly calculate required network bandwidth for a shared network.**

**Network Configuration**

Network devices to be used at time of FreedomVoice installation:

Modem Make/Model: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  Customer Provided, [ ]  ISP Provided/Managed

 [ ]  Purchased through FreedomVoice

Router Make/Model: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  Customer Provided [ ]  ISP Provided/Managed,

 [ ]  Purchased through FreedomVoice

Firewall Make/Model: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  Customer Provided [ ]  ISP Provided/Managed,

 [ ]  Purchased through FreedomVoice

Switch Make/Model: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ [ ]  Customer Provided [ ]  ISP Provided/Managed

 [ ]  Purchased through FreedomVoice

Will you be using VLANs to segment traffic between phones and other devices? [ ]  Yes, [ ]  No

If yes, what is the VLAN for the phones? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What is the external (real) IP address of the router? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What is the internal IP block for the VLAN where phones will be installed? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Phones**

Where will the phones be purchased?

[ ]  FreedomVoice/Partner, [ ]  Customer using existing phones, [ ]  Other

If not supplied by FreedomVoice/Partner, please specify the make and model of all phones:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How will phones be addressed on the network? [ ]  DHCP, [ ]  Static IP

Will Power-over-Ethernet (POE) be used to connect phones? [ ]  Yes, [ ]  No

Will any devices such as a computer be daisy-chained to any of the phones or will the phones have their own direct link to the switch? [ ]  Daisy-Chained, [ ]  Direct Link

Will any soft phones be used with this system? [ ]  Yes, [ ]  No

**VoIP Test**

VoIP tests should be conducted from a computer at the installation location and on the same network (including subnet or VLAN) at three different times of day, preferably for a few days in a row.

To run our VoIP test visit <http://www.freedomiq.com/voip-speed-test.shtml>

|  |  |  |  |
| --- | --- | --- | --- |
|  | Test 1 (Morning) | Test 2 (Noon) | Test 3 (Night) |
| Speed Test # |  |  |  |
| Test Date and Time |  |  |  |
| Jitter Result |  |  |  |
| Packet Loss |  |  |  |
| RTT (MS/Latency) |  |  |  |
| MOS Score |  |  |  |
| Download Speed |  |  |  |
| Upload Speed |  |  |  |
| Download Capacity |  |  |  |
| Upload Capacity |  |  |  |
| Quality of Service |  |  |  |

***NOTE: Customer or Partner is solely responsible for engineering, configuration, management, troubleshooting and support of LAN and WAN connectivity. Even though FreedomVoice maintains 99.99% uptime, call quality is unrelated and can never be guaranteed when using the public internet.***

**Bandwidth Calculator**

The FreedomVoice bandwidth calculator is a tool that helps to automatically calculate required network bandwidth based on number of phones, network usage, number of computers and servers and WIFI devices. Click [HERE](http://cdn.freedomvoice.com/static/weblink/agent/FreedomIQ_Bandwidth_Calc.xlsm) to download the bandwidth calculator.



|  |
| --- |
| **Section 3: New Trunk / Line Configuration** |
| **Type**System/DID/Analog | Phone # | **Action** | **Location** | **Description** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| **LNP (Port) Information** |
| Signed LNP Form & Carrier Bills Sent to FreedomVoice on \_\_\_\_\_\_\_\_\_\_\_\_ (Date) requesting porting of the XX numbers above, on *\_\_\_\_\_\_\_\_\_\_\_\_* (Date). Expected Dates: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

|  |  |
| --- | --- |
| **Actions** | **Routing Options** |
| **K** = **K**eep (Port/LNP)**D** = **D**isconnect**L** = **L**eave (with Current Carrier)**N** = **N**ew (To Be Ordered) | Route to **E**xtension (Example: **E**-801)Route to **C**all **G**roup (Example: **CG**-81)Route to **A**uto **A**ttendant (Example: **AA**-1)Route to **Operator** (Example: **Operator**) |

|  |
| --- |
| **Section 4: Extension Configuration Worksheet** |
| **Current****Ext #** | **New****Ext #** | **User Display Name** | **User Email**(WebLink Login) | **Type (**Virtual/VoIP/Physical/Group) | **DID #**(Reserved) | **DID #**(Ph/Fax; Public) |
|  | 80 |  |  |  |  |  |
|  | 81 |  |  |  |  |  |
|  | 82 |  |  |  |  |  |
|  | 83 |  |  |  |  |  |
|  | 84 |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  | 800 |  |  |  |  |  |
|  | 801 |  |  |  |  |  |
|  | 802 |  |  |  |  |  |
|  | 803 |  |  |  |  |  |
|  | 804 |  |  |  |  |  |
|  | 805 |  |  |  |  |  |
|  | 806 |  |  |  |  |  |
|  | 807 |  |  |  |  |  |
|  | 808 |  |  |  |  |  |
|  | 809 |  |  |  |  |  |
|  | 810 |  |  |  |  |  |
|  | 811 |  |  |  |  |  |
|  | 812 |  |  |  |  |  |
|  | 813 |  |  |  |  |  |
|  | 814 |  |  |  |  |  |
|  | 815 |  |  |  |  |  |
|  | 816 |  |  |  |  |  |
|  | 817 |  |  |  |  |  |
|  | 818 |  |  |  |  |  |
|  | 819 |  |  |  |  |  |
|  | 820 |  |  |  |  |  |
|  | 821 |  |  |  |  |  |
|  | 822 |  |  |  |  |  |
|  | 823 |  |  |  |  |  |
|  | 824 |  |  |  |  |  |
|  | 825 |  |  |  |  |  |
|  | 826 |  |  |  |  |  |
|  | 827 |  |  |  |  |  |
|  | 828 |  |  |  |  |  |
|  | 829 |   |  |  |  |  |
|  | 830 |  |  |  |  |  |
| **Notes** |
|  |
| **Default Configuration Settings for Individual Extensions** |
| Unified Messaging: | [ ]  Yes [ ]  No  |
| Audio File Format: | [ ]  .MP3 [ ]  .WMA [ ]  .WAV |
| Voice Mail Password: | [ ]  Yes [ ]  No |
| Call Waiting:[ ]  Multiple [ ]  Single | Busy Call Handling:[ ]  Forward to Extension:[ ]  Forward to Voice Mail[ ]  Place Caller in Queue[ ]  Forward to Auto Attendant | No Answer Call Handling:[ ]  Forward to Extension:[ ]  Forward to Voice Mail[ ]  Forward to Auto Attendant[ ]  Enable One Number Find Me |
| # of Seconds Before Handling: 30 (Default) |

|  |
| --- |
| **Section 5: WebLink System Settings** |
| **System Defaults** (Left Navigation Menu) |
| Default Mailbox:  |  | Feature Description: Default: 800 |
| Default Fax Mailbox: |  | Feature Description: Default: 800 |
| Immediate Call FWD: | [ ]  On [ ]  Off | Feature Description: Default: Off |
| **Call Blocking** |
| Block Calls from Payphones: | [ ]  No [ ]  Yes (Surcharges May Apply to 800# Calls from Payphones) |
| Blocked Incoming Numbers: |  |
| **Dial By Name** |
| Use Dial By Name Directory | [ ]  Yes [ ]  No  |
| Recording Prompts Caller For: | [ ]  Last Name [ ]  First Name (Pick Only 1) |
| Announce Box # Before Transfer: | [ ]  Yes [ ]  No |
| **Fax on Demand** |
| Upload Fax on Demand Files:  | [ ]  Yes [ ]  No (See WebLink for Upload Instructions) |
| **Intercom** |  |
| Activate ## Intercom Feature: | [ ]  Yes [ ]  No |
| **System Recordings** |
| Main Menu Auto Attendant: | [ ]  Have System Call [ ]  Professional [ ]  Customer Provided Audio File |
| Mailbox Directory Listing: |  |
| Hold Music (MOH): | [ ]  Default Standard [ ]  MOH Upgrade [ ]  Customer Provided Audio File |
| **Business Hours** | **Start Time** | **End Time** | **Alternate** |
| Monday |  |  |  |
| Tuesday |  |  |  |
| Wednesday |  |  |  |
| Thursday |  |  |  |
| Friday |  |  |  |
| Saturday |  |  |  |
| Sunday |  |  |  |
| Extensions: |
| Alternate Greetings: | Holiday Greetings: |
| **Outbound Caller ID Display** (FreedomVoice Back-End Customization) |
| Number to Display on Caller ID: | [ ]  Individual DID [ ]  System Main # (Default) [ ]  Custom:  |
| **Voicemail Transcription** |
| Voice Transcription: | [ ]  Disable [ ]  Enable (Cost is $.25 for every 30 seconds; 2 Min/Max) |
| **Mailbox Defaults** (Left Navigation Menu) |
| Mailbox Name: | [ ]  Name All User Mailboxes (Extensions) |
| Call Forward Caller ID Display:(Pick Only 1) | [ ]  Caller’s Number (CID # Only) [ ]  Number Caller Dialed (DNIS) |
| Fax Forward Number | [ ]  Off [ ]  On |
| **MB (Mailbox/Extension) Recordings** |
| Setup for User Extensions: | [ ]  Have System Call User [ ]  User Call-In (See WebLink Instructions) |

|  |
| --- |
| **Section 6: ACD / Call Group Configuration** |
| ACD/Call Groups are “extensions” (Usually 2-Digits, 80-89) that consist of either VoIP extensions or off-system phone numbers (land lines, cell phones, etc.) that can all perform the same function (i.e. operator call group, sales call group, customer service call group, etc.). Unlimited ACD/Call Groups can be created. |
| **Call Group Administrator Password:**  | **1234** (Default – Please Change) |
| **Call Group Extension:** |  |
| **Call Group Name:** |  |
|  Member Extensions or Phone # | Call Group Distribution Method:Automatic Call Group Login (Number NOT User) | [ ]  **Call Rotation** – Call Each Member in Order. Members can be listed more than once.[ ]  **Most Idle Calling** – Call the member that has been off the phone for the longest time. Call the idlest element first.[ ]  **Least Call Time** – Call group members by least total time on the phone. Total is the sum of when the call is picked up until the “caller” hangs up. An adjustment is made for when each logged on.[ ]  **End Waiting** – Call first available group member not on the phone or in a grace period. System starts sequentially from the top of the list.[ ]  **Simultaneous** – Call all the members of the group at the same time. (max. 5) |
| 1 |  | 2 |  | 3 |  |
| 4 |  | 5 |  | 6 |  |
| 7 |  | 8 |  | 9 |  |
| 10 |  | 11 |  | 12 |  |
| 13 |  | 14 |  | 15 |  |
| 16 |  | 17 |  | 18 |  |
| 19 |  | 20 |  | 21 |  |
| 22 |  | 23 |  | 24 |  |
| 25 |  | 26 |  | 27 |  |
| 28 |  | 29 |  | 30 |  |
| 31 |  | 32 |  | 33 |  |
| 34 |  | 35 |  | 36 |  |
| 37 |  | 38 |  | 39 |  |
| 40 |  | 41 |  | 42 |  |
| 43 |  | 44 |  | 45 |  | Grace Period (Wrap): | \_\_\_\_\_\_\_ seconds*(Time to wait after a call before allowing another call to come through to the same element)* |
| 46 |  | 47 |  | 48 |  |
| 52 |  | 53 |  | 54 |  |
| 55 |  | 56 |  | 57 |  | Call Group VM Forwarding: | [ ]  Delete After Forwarding[ ]  Keep Messages as New[ ]  Keep Messages as Saved |
| 58 |  | 59 |  | 60 |  |
| 61 |  | 62 |  | 63 |  |
| 64 |  | 65 |  | 66 |  | Email Voice Mail: | [ ]  Yes [ ]  No |
| 67 |  | 68 |  | 69 |  | Email Address: |  |
| 70 |  | 71 |  | 72 |  | Agent/User Setup: | [ ]  Group (Login/Out) [ ]  By Phone # |
| 73 |  | 74 |  | 75 |  | Enable Call Queuing: | [ ]  Yes [ ]  No |
| 76 |  | 77 |  | 78 |  | Announce Q Position: | [ ]  Yes [ ]  No |
| 79 |  | 80 |  | 81 |  | New Call Announce: | [ ]  Yes [ ]  No |
|  |  |  |  |  |  | Maximum Hold Time: | 5 Minutes (Default) |
|  |  |  |  |  |  | Call Announcement: | [ ]  Yes [ ]  No |
|  |  |  |  |  |  | Call Whisper: | [ ]  Yes [ ]  No |
|  |  |  |  |  |  | Caller ID Announce: | [ ]  Yes [ ]  No |
|  |  |  |  |  |  | Ring Time: | 10 Seconds (~ 6 Rings) |
|  |  |  |  |  |  | Call Group Hours: | 24x7 |

**Please add an additional sheet for each call group.**

|  |
| --- |
| **Section 7: Auto Attendant Configuration** |
| **Auto Attendant 1** (Defaults) |
| Name: | *Main Auto Attendant* |
| Press **1** for: | *Transfer to x81* | Press **6** For: | *Fax Back* |
| Press **2** for: | *Transfer to x82* | Press **7** For: | *x801 (or default box)* |
| Press **3** for: | *Transfer to x83* | Press **8** For: | *Listing of Extensions* |
| Press **4** for: | *Transfer to x84* | Press **9** For: | *Repeat* |
| Press **5** for: | *Transfer to x85* | Press **0** For: | *Transfer to x80* |
| Press **\*** for: | *Set up & Voicemail* | Press **#** For: | *Dial by Name (Directory)* |
| Timeout: | *x801 (or default box)* | Notes: |  |
| **After Hours** (Optional) |
| Name: |  | Phrase #: |  |
| Press **1** For: |  | Press **6** For: |  |
| Press **2** For: |  | Press **7** For: |  |
| Press **3** For: |  | Press **8** For: |  |
| Press **4** For: |  | Press **9** For: |  |
| Press **5** For: |  | Press **0** For: |  |
| Press **\*** For: |  | Press **#** For: |  |
| Timeout: |  | Notes: |  |
| **Auto Attendant 2** (Optional) |
| Name: |  |
| Press **1** For: |  | Press **6** For: |  |
| Press **2** For: |  | Press **7** For: |  |
| Press **3** For: |  | Press **8** For: |  |
| Press **4** For: |  | Press **9** For: |  |
| Press **5** For: |  | Press **0** For: |  |
| Press **\*** For: |  | Press **#** For: |  |
| Timeout: |  | Notes: |  |
| **Auto Attendant 3** (Optional) |
| Name: |  |
| Press **1** For: |  | Press **6** For: |  |
| Press **2** For: |  | Press **7** For: |  |
| Press **3** For: |  | Press **8** For: |  |
| Press **4** For: |  | Press **9** For: |  |
| Press **5** For: |  | Press **0** For: |  |
| Press **\*** For: |  | Press **#** For: |  |
| Timeout: |  | Notes: |  |
| **Auto Attendant 4** (Optional) |
| Name: |  |
| Press **1** For: |  | Press **6** For: |  |
| Press **2** For: |  | Press **7** For: |  |
| Press **3** For: |  | Press **8** For: |  |
| Press **4** For: |  | Press **9** For: |  |
| Press **5** For: |  | Press **0** For: |  |
| Press **\*** For: |  | Press **#** For: |  |
| Timeout: |  | Notes: |  |

|  |
| --- |
| **Section 8: System Recordings** |
| **Description** | **Phrase #** | Phrase Recording |
| Main Menu(Open) |  | Thank you for calling **ABC Company**. If you know your party’s 3-digit extension, you may enter it at anytime. For the company directory by first name, press #. To leave a message in our general voice mailbox, press 0. For our address, website, fax number and hours of operation, press 5. To repeat this greeting, press 9. Thank you again for calling **ABC Company** and please make your selection at this time. |
| Main Menu(Closed) |  | Thank you for calling **ABC Company**; our office is now closed. However, If you know your party’s 3-digit extension, you may enter it at anytime. For the company directory by first name, press #. To leave a message in our general voice mail box, press 0. For our address, website, fax number and hours of operation, press 5. To repeat this greeting, press 9. Thank you again for calling **ABC Company** and please make your selection at this time. |
| Moving Days |  | Thank you for calling **ABC Company**. Our office will be closed as we will be moving on **Friday DATE** with limited phone access during this time. However, if you know your party’s 3-digit extension, you may enter it at anytime to be transferred to their cell phone or voice mail. For the company directory by first name, press #. To leave a message in our general voice mail box, to be returned when our office re-opens on **Date**, press 0. For our new address, website, fax number and hours of operation, press 5. To repeat this greeting, press 9. Thank you again for calling **ABC Company** and please make your selection at this time. |
| Call Group Operator |  | You have reached the general voice mailbox for **ABC Company**. At the tone, please leave a detailed message being sure to clearly state your name, contact information and the reason for your call. Someone will return your call as soon as possible.  |
| Directions |  | **ABC Company** is located at **Address.** Our general fax number is **Fax**. Our office hours are from 8:30 am until 5:00 pm, Monday through Friday. You can find us on the web at [**www.abccompany.com**](http://www.abccompany.com)**.** Thank you again for calling. |
| **Locations and Names of these files if they are already recorded:** |
| Section 9: Customer Preparation Checklist(Please Complete Prior to Pre-Installation Configuration Meeting) |
| * ***Thoroughly*** Review “FreedomVoice Configuration Workbook” and Complete As Many Sections As Possible. (Note: Your Project Manager will completely review this information with you at the time of your Pre-Installation Configuration Meeting). **Thank you for being prepared for this meeting!**
* Provide a Listing of All Phone Lines, T1/PRI Circuits and DID Numbers.
* Provide a Listing of All Extension Numbers and User Names.
* Provide Complete Copy of Current Carrier Phone Bill(s) for Any Numbers to be Ported.
* Sign Any Necessary LNP or RESPORG Forms, Necessary for Number Porting.
* Provide a Detailed Floor Plan Clearly Showing the Location of Each Phone Extension, Fax, Modem, Credit Card Terminal or Other Peripheral Devices which require phone line connectivity.
* Develop General Call group Routing & Configuration (See Workbook).
* Develop General Auto Attendant Configuration & Recorded Phrases Listing (See Workbook).
* Provide Audio Files (.WAV or .MP3) of Custom Auto Attendant, Greetings, Music on Hold, etc.
* Prepare Communication to Employees Informing of new Phone System Installation and Provide Schedule of Required Training Classes (Can be completed following Pre-Installation Configuration Meeting).

***Note to Customers: It is VERY IMPORTANT that you have the above items available for the Partner Project Manager at the time of your initial Pre-Installation Configuration Meeting. If you have any questions on the above items, or require any clarification, please contact your Partner in advance.*** |
|  |
|  |
| Section 10: Partner Pre-Installation Checklist(To Be Completed Before System Cutover Date) |
| **Done** | **Date** | **Initials** | **Action** |
|  |  |  | Affix E-911 Sticker to Visible Location on Phones |
|  |  |  | Setup WebLink Login Account  |
|  |  |  | Setup WebLink Login Account(s) for Customer “Administrator(s)” |
|  |  |  | Setup WebLink Login Accounts & Extensions for Customer “Users.” |
|  |  |  | Record Phrases for Auto Attendants, Call group Queues & call group Voice Mail |
|  |  |  | Configure Settings From “FreedomVoice Configuration Workbook” |
|  |  |  | Run Speed Test from Customer Site & Note Results Below |
|  |  |  | Cancel / Disconnect any Temporary Numbers Assigned by FreedomVoice |
|  |  |  | Verify All WebLink Users Have Extensions Assigned (WebLink “User List”) |
|  |  |  | Change All “Administrator” Passwords in WebLink from Default |
|  |  |  | Verify (and any others) is setup in WebLink |
|  |  |  | Enable Call Recording for ALL Inbound and Outbound Extensions |
| **Configuration Notes:** (To be completed before going on site) |
| **Advanced Customizations (Additional Cost):**customizations@FreedomVoice.com  |
| **Section 11: Installation Checklist** |
| **Pre-Installation Configuration Meeting** |
| Date/Time: | Added to Calendar? [ ]  |
| * **Complete FreedomVoice Configuration Workbook.**
* Review Trunk/Line Configuration (Analog Lines, T1/PRI, Faxes, Modems, Alarm Lines, Etc.).
* Review Extension Configuration (User First & Last Name, DID Number, Phone IP Address, Etc.).
* Review Floor Plan Listing Location of Each Extension, Fax, Modem or Other Peripheral Devices.
* Review ACD/Huntgroup/Call Group Configuration.
* Review IVR/Auto Attendant Configuration & Phrase Management.
* Site Survey to Analyze Wiring Infrastructure, Jacks, Server Location, Network Requirements, Etc.
* LNP & RESPORG Forms Signed by Customer – Provide Phone Bill Copy for FreedomVoice.
 |
| **#1 – On-Site (Pre-Installation)** |
| Date/Time:  | Added to Calendar? [ ]  |
| * Locate & Label all Trunks & Extensions at DEMARC.
* Test Loop Current (Analog Lines Only) & Install Optional Regulators If Needed.
* Install Client Applications & Plug-ins on PCs.(Favorite WebLink URL on browsers – <http://www.freedomiq.com>)
* Configure Music/Message On Hold (Customer Provided Audio File).
* Configure & Test Voice Over IP Calling (Inbound/Outbound).
* Setup Phone Sets & Place in Offices in Preparation of Day #2 Cut-Over.
* Setup & Configure Training System & Extensions for Day #2 Training Classes.
* Record Phrases for Auto Attendants, Call Group Queues, and CG Voice Mail.
* Get custom audio files (.WAV or .MP3 from Customer) for AA, VM, MOH, Comfort, Etc.
* Enable “Call Recording” Feature for All User Extensions (Optional).
 |
| **#2 – On-Site Training & Cut-Over** |
| Date/Time: | Added to Calendar? [ ]  |
| * Verify that Users have Recorded VM Greetings (& CG Greetings).
* Conduct “Basic” User Training (Phone Features, Voice Mail, Etc.) – All Employees to Attend.
* Conduct “Administrator” Training (WebLink Reports, Etc.).
* Conduct “Operator/Receptionist” User Training.
* Conduct Remote/IP User Training (On-Site or Via Webinar/Conference Call).
 |
| **#3 – On-Site (“Day After” Follow-Up)** |
| Date/Time: | Added to Calendar? [ ]  |
| * Follow-Up with Any Issues or Configuration Changes – Create “Punch List” of Follow-Up Items & Review with Customer.
* Conduct Additional “One on One” Training As Necessary.
* Project Turned Over to Customer Care Department – Give Contact Information & Instructions to Customer Phone: (800) 477-1477 or Email: customercare@freedomvoice.com.

Answering Service for After-Hour Emergencies: (800) 285-6909*Be SURE to Include: Customer #, Phone # and DETAILED description (with specific call examples – from #, to # & time).** Any Final Payment from Customer
* Initiate Monthly Billing for Premium Customer Care Plan in FVS Billing System (if applicable)
 |
| **Section 12 – Customer Care** |
| **Phone Support** |
| **(800) 477-1477 (Normal Business Hours)**(800) 285-6909 (Answering Service for After Hours Emergencies) |
| **Email Support (Preferred)** |
| customercare@freedomvoice.comPlease be sure to include the following information (in the subject line) that will allow your account to be located quickly:1. **Your FreedomVoice customer #**
2. **Your main phone #: (Any # on your Account)**
3. **Existing Case # (if any).**

While not required, it would be VERY helpful if your email used the following format for the most efficient and prompt handling:Subject Line: **[Customer Name] - Description of Problem - Phone # - FVS Account # - (Case XXXX)** |
| **Support Tips** |
| When contacting Customer Care, it is VERY IMPORTANT to provide specific call examples, including:1. **DETAILED description of the problem with as much information as possible (i.e. phone numbers, extensions, examples, etc.), as the support technician assigned to your case may not be intimately familiar with your system or configuration. Provide a full example of the call.**
2. **Number problem call came FROM.**
3. **Number problem call was placed TO.**
4. **Exact time and date for log tracking.**

Example: **Called 404-225-2325 from my office phone 818-398-0034 at 3:00pm**If you are experiencing call quality issues (problems with audio, delay, etc.), BEFORE contacting support, please run the online "VoIP Speed Test" and provide the results in your email (test number and/or screen shots) for more accurate isolation and troubleshooting:<http://www.freedomiq.com/voip-speed-test.shtml>If additional information or testing is requested of customer, and there is no response within 48 business hours, the ticket may be automatically closed by the carrier and/or your Partner and will need to be re-opened if the issue persists. |