

## Customer Data Collection for Phone System

Business Name	Address	Main Phone
Contact Name (who filled in form)	Email	DID / Cell

Please write down the name of the phone user or area, their current extension, what department or title they have and what phone model they will be getting. If you need extra lines, print out additional copies of this page one and attach. In the V column, put an "x" if this extension should have voicemail. In the E column, put an "x" if the wiring to this extension exists and there is a current phone there and it is functional. In the W column, put an 'x' if the phone will be wall mounted.

NAME	EXT	DEPT / FUNCTION / LOCATION	MODEL	V	E	W


Please list your phone numbers and purpose. Use terms such as main number, hunt group member, line to service department direct line to (name), etc. Provide additional sheets as needed.

PHONE NUMBER	PURPOSE

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**Please check all the following conditions that apply. They are related to additional phone lines your company is responsible for and use. Please be sure, if there are lines not mentioned - your credit card or postage meter may be disconnected during the install process. You must choose at least one condition.**

	I have NO other analog phone line needs other than a Fax line and other numbers listed above
	I have NO other analog phone line needs other than the main numbers listed above
	I have a credit card machine that uses the same line as my fax machine
	I have a credit card machine that uses a phone line but a dedicated line which is:
	I have a credit card machine but it is network connected and does not use a phone line
	I have a postage meter that uses the same line as my fax machine
	I have a postage meter that uses a phone line but a dedicated line which is:
	I have a postage meter but it is network connected and does not use a phone line
	I have an alarm system that uses a dedicated phone line and the number is:
	I have an alarm system that uses a backup dedicated phone line and the number is:
	List other phone lines not yet listed below (not hunt lines)

On your current system please describe what happens when your main line rings during the day. i.e which phones ring, what happens if the call is not answered, or does the auto attendant pickup right away.


On your current system please describe what happens when your main line rings during the night. i.e which phones ring, what happens if the call is not answered, or does the auto attendant pickup right away.



On your current system, please list what features you use regularly - such as transfer, holding, call pickup groups, page to phones, page to loudspeaker in warehouse, parking, speed dial, user direct dial buttons, call forwarding, coverage of another's phone, etc.


Are there any new features you would like to see implemented on your new system?


If you have an auto attendant that picks when no one is available, what does it say. It may be something like "Thank you for calling XYZ Company, all operators are busy, if you know your party's extension you may dial it at any time or for our service dept dial one, sales 2 or an operator 3"


If you have an auto attendant that picks up at night, what does it say. It may be something like "Thank you for calling XYZ Company, all operators are busy, if you know your party's extension you may dial it at any time or for our service dept dial one, sales 2 or an operator 3"


For the above mentioned night attendant how would you like to have the system switch into night mode - by  
[ ] Automatically by a predetermined schedule [ ] From a button on a centrally located phone

Are there any other features or info you can tell us to better program your new phone system?


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If you would like voicemail to email function to be enabled, please attach a list of all the users with their email address included. We will also need your network person to call us so we can ask them additional questions about your email system.

[ ] I would like this function enabled if it is possible with our email server.

Is there space for a new phone system where the old one is to be installed? Are there any new wires that need to be run, for phones, phone lines, or new electrical outlets?


Punchlist:

- Fill in this form
- Send pictures of space where phone system is going, existing phone system on wall
- Name and phone of IT person or Network Service Company / Contact

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