

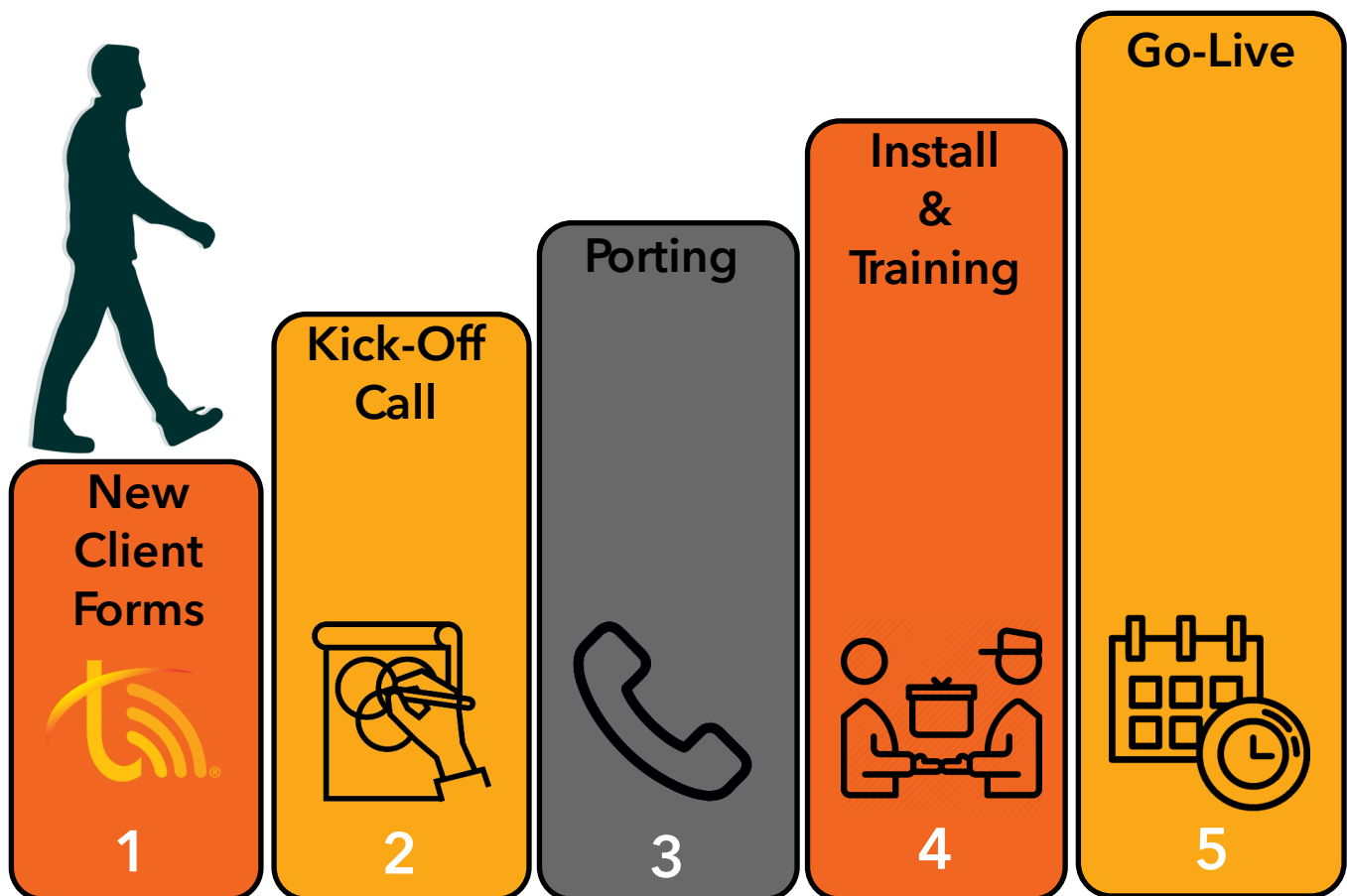


Thank you for choosing TeleVoIPs as your business' communication partner! We're glad to have you and wanted to provide some resources for you to have on hand moving forward with your new phone system.

In this document, we outline the 5 major steps of our onboarding process, including what you can expect and the general timing of the project.

If after reviewing this document you have additional questions, please contact the Implementation Team at [implementation@televoips.com](mailto:implementation@televoips.com) or 813-655-5100, option 2.

## Onboarding Steps:



## Step 1: New Client Forms

Once the quote has been signed, the first step is to complete all the necessary forms and provide a copy of the bill dated within 30 days.

<https://televoips.com/our-clients/forms/>

Password: Televoips1#

## Onboarding Document FAQs

### Letter of Authorization (LOA) Form:

The LOA is required by the losing service provider as proof that you're authorized to transfer your current telephone number to TeleVoIPs.

### What should I list as the requested port in date?

This is the date you would like TeleVoIPs to take possession of your number and Go-Live on your new phone system. The onboarding process usually takes 3–4 weeks.

### What numbers should I port?

Any telephone number that has been published (email signatures, website, business cards) or shown on your Caller ID should be ported in. If the numbers are published or you currently receive calls to those numbers, then we recommend porting them. We can run a report after 30-60 days to see if any activity has been made on those numbers. If not, we can disconnect the numbers for you.

Your fax number should be listed on the TeleVFax LOA if you are using TeleVoIPs for your fax service provider.

**Bill Copy:** The losing carrier requires a bill copy that is dated within 30 days be attached to your LOA form. TeleVoIPs will submit the forms to move your numbers after your kick-off call is complete and we've discussed the timeline with you.

**E911 form:** This form is used to establish your physical address in the 911 emergency database.

### Kick-off Questionnaire:

This form is for you to share your company contacts and call flow details prior to the kick-off call. We understand that you may not be able to fully answer all the call flow questions yet and we'll discuss them in more detail during your kick-off call. We simply ask that you add as much info as possible so we can best prepare your new phone system to fit your needs!

Contact us at: 813.655.5100, Option 2 or [implementation@televoips.com](mailto:implementation@televoips.com)

## Step 2: Kick-Off Call

Once we receive all requested documentation, we will schedule a conference call to initiate this step.

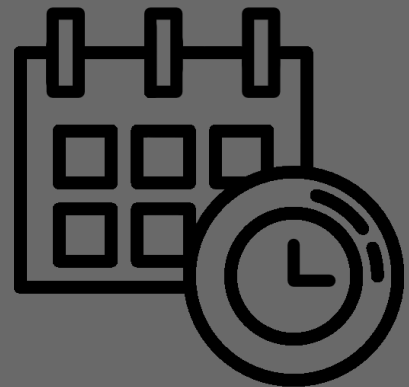
The goal of the kick-off call is to establish your unique phone preferences and set-up. During our call, we'll go over our call flow questionnaire that covers things like:

- How many times should the phone ring before going to voicemail?
- When it's after-hours, should the phone go directly to VM or ring first?
- Phone Customization Options



## Step 3: Porting

The very first thing we'll work on is porting over your existing phone numbers. This is a purely technical step and we will manage it on your behalf. It generally takes 3-4 weeks to complete the process.



We'll work with you to schedule an Install, Training, and Go-Live date, giving you plenty of time to prepare for the switch to TeleVoIPs.

## Step 4: Install and Training

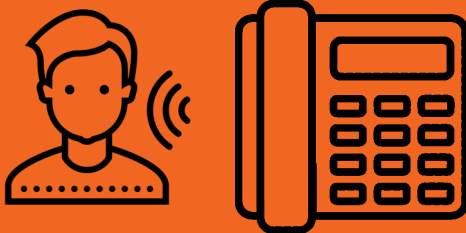
This includes an onsite visit where we come to your location to install all of your new phone equipment.



- 1 You'll receive your new phone equipment 3-5 business days prior to your scheduled install date.



- 2 Keep the phones in a secure, accessible location in their boxes until the install date.



- 3 \*A technician will arrive at the scheduled time to unbox, set up and test your new phone system for you.



- 4 Your team will participate in a virtual training session with our technician to learn how to use your new phones and services.

\*If you opted for self-install, we ask that you have the equipment unboxed and plugged in 2 days prior to your scheduled install date.

## Self-Install Process

TeleVoIPs is excited to help you set up your new phone! Please complete the below steps 2 days before your scheduled install day.

### Install

Follow the User Setup Guide to unbox, assemble, and plug in your phone.

### Activation

Complete a test call from your new phone to 813-906-6006 to confirm your phone is ready for use.

Contact us at: 813.655.5100, Option 2 or [implementation@televoips.com](mailto:implementation@televoips.com)

## IMPORTANT Reminders:



Prior to Go-Live, please be sure to note the following:

**APPROVAL OF CALL FLOW** – Needed 5 business days prior to install to ensure your project stays on target.

**OLD PHONES** – Your old phones will remain active until the Go-Live date. During this step, end-users will have both phones positioned on their desks.

**DISPOSAL/RETURN PLAN** – TeleVoIPs recommends notifying the losing carrier of cancellation 2 days after Go-Live. Make plans for disposal/return of old equipment.

**TEST THEM OUT** – Encourage your end-users to familiarize themselves with the new phones during this step. Get voicemail set up, review the user guide, learn the soft keys, etc.

## Step 5: Implementation

It's GO TIME!

Now that everything is in place and tested, your system is ready to Go-Live. On the designated Go-Live date, your old phones will stop working and the new TeleVoIPs phones will be activated. Once your TeleVoIPs service is live, you can proceed with removing your old phones and following your disposal/return plan.

\* We recommend leaving one old phone plugged in for 1-2 days following Go-Live to ensure all numbers ported properly.

**NOTE:** Following your Go-Live date, you will work with our support team, which can assist with all of your technical questions and needs. If you need to reach support you can email your request to [support@televoips.com](mailto:support@televoips.com) and a support ticket is created for you or you can call them at 813-655-5100 option 2. Any time you have a question or need support, feel free to send directly to [support@televoips.com](mailto:support@televoips.com) for the quickest ticket creation and resolution.

Contact us at: 813.655.5100, Option 2 or [implementation@televoips.com](mailto:implementation@televoips.com)