INITIAL SITE VISIT CHECKLIST

1. PHONE DETAILS

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|  | Determine how many phones there are. Are all of them on site or are some remotely based? |  |  |
|  | What is the model of the phones? Are all of the phones the same model? |  |  |
|  | What does the interface/screen of the phone look like? Are they all the same? Take pictures of each different appearance |  |  |
|  | Look at which firmware the phones are on. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |  |
|  | Obtain the MAC address for each phone. Match it to a phone number (and location if possible) |  |  |
|  | Will there be any virtual numbers? |  |  |

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|  | What is their main number? |
|  | Do they want all lines to show the same number going out or should they show their individual number (call appearance) |
|  | Where do the calls need to go if they are not answered? Should it go direct to voicemail, or to a colleague or central number that can reroute? If it is not answered at the second step, then where should it go? Etc…..etc….. |
|  | Music on Hold, will they be providing a file for music or shall we use one of our own? |
|  | Does anyone want voicemail to email? |
|  | What do you want the Caller ID appearance to be? Is it the same for each line or different? |

1. CALL FLOW