**Customer Name:** **Enter Customer Name**

**Customer Contact** **Enter Customer Contact, Contact E-Mail** **Enter Contact Email**

|  |  |  |
| --- | --- | --- |
| **Task** | **Response / Comment** | **Date of Action** |
| **Quote Approved:** |  |  |
| **Quote Approval Date** |  |  |
| **Customer payments made** |  |  |
| **DISCOVERY:** |  |  |
| **Conduct Network Readiness Survey** |  |  |
| **Create Customer Network Diagram** |  |  |
| **Conduct Customer Phone Survey** |  |  |
| **Create Customer Call Flow Diagram** |  |  |
| **Obtain copy of existing phone bill** |  |  |
| **Obtain copy of customer extension listing** |  |  |
| **Obtain copy of customer employee names and email addresses** |  |  |
| **DEALTRACK** |  |  |
| **General:** |  |  |
| **Make sure there is a Deal Finalized date** |  |  |
| **StarNet Analyzer:** |  |  |
| **Circuit information filled in** |  |  |
| **Submit StarNet Analyzer Pre-Qualification** |  |  |
| **Download SNA tool** |  |  |
| **Run SNA Test** |  |  |
| **SNA Test results received** |  |  |
| **Porting:** |  |  |
| **All porting numbers entered into portal** |  |  |
| **Portal number requests “Accepted”** |  |  |
| **Downloaded LOA forms and sent to customers** |  |  |
| **Signed LOA forms sent to** [**accountservices@star2star.com**](mailto:accountservices@star2star.com) |  |  |
| **New Number:** |  |  |
| **Request any new numbers required** |  |  |
| **Circuits:** |  |  |
| **Request a new circuit if required** |  |  |
|  | | |
| **PORTAL CONFIGURATION – Basic Configuration** |  |  |
| **Location Information** |  |  |
| **Enter & Verify Service Address Information** |  |  |
| **Enter & Verify Billing Contact Information** |  |  |
| **Additional Location Information** |  |  |
| **Enter & Verify Time Zone** |  |  |
| **Enter & Verify DST Setting (Y/N)** |  |  |
| **Enable Advanced Scheduling (Y / N)** |  |  |
| **Allow Dialing out from Voicemail (Y/N)** |  |  |
| **Play FM-FM Announcement (Y/N)** |  |  |
| **Directory Sort Order (Last/First)** |  |  |
| **Announce Ext. on Directory (Y/N)** |  |  |
| **Multi-Location Directory (Y/N)** |  |  |
| **Multicast Paging (Y/N) (VVX or Yealink only)** |  |  |
| **Show 5 digit Extension (Y/N)** |  |  |
| **Key System Mode (Y/N)** |  |  |
| **Park Positions (1 – 4)** |  |  |
| **Primary DID:** |  |  |
| **Primary DID (Select from Pulldown)** |  |  |
| **Business Hours:** |  |  |
| **Business Hours (Select)** |  |  |
| **Maintenance Window:** |  |  |
| **Maintenance Window (Select)** |  |  |
| **After Hours Contact:** |  |  |
| **Select when to Contact** |  |  |
| **Enter Primary Contact Name** |  |  |
| **Enter Primary Contact Phone #** |  |  |
| **Enter Primary Contact Email Address** |  |  |
| **Additional Contacts:** |  |  |
| **Enter any additional contacts required** |  |  |
| **EXTENSIONS: (Steps will be repeated for all new users)** |  |  |
| **Add new User Name** |  |  |
| **Enter Extension #** |  |  |
| **Enter Extension Name (First Last)** |  |  |
| **Enable Voicemail Box (Y/N)** |  |  |
| **Select Phone Model for user** |  |  |
| **Select Outgoing CallerID for Lines 1 - 4** |  |  |
| **Remote Extension (Select)** |  |  |
| **Expansion Modules (Select if needed)** |  |  |
| **Calling Options** |  |  |
| **Allow Intracompany Calls (Select)** |  |  |
| **Allow Local Calls (Select)** |  |  |
| **Allow Long Distance Calls (Select)** |  |  |
| **Allow International Rate Calls (Select)** |  |  |
| **Allow Toll Free Calls (Select)** |  |  |
| **Allow 411 Calls (Select)** |  |  |
| **Hide Extension from Company Directory (Select)** |  |  |
| **Hide Extension (Select)** |  |  |
| **Enable Call Accounting Codes (Select)** |  |  |
| **Add Call Accounting Codes (Enter)** |  |  |
| **CLICK ADD Extension** |  |  |
| **(NOTE: for internal only calling uncheck all calling option boxes)** |  |  |
| **ANALOG BACKUP / OPERATOR:** |  |  |
| **Analog Backup** |  |  |
| **Select Inbound Analog call Routing** |  |  |
| **Analog Devices** |  |  |
| **Select Device 1 from pulldown** |  |  |
| **Enter Analog Backup Number 1** |  |  |
| **Select Device 2 from pulldown (normally not required)** |  |  |
| **Operator** |  |  |
| **Select Operator Location from Pulldown** |  |  |
| **DESTINATIONS:** |  |  |
| **Enter / Create / Update Ring Groups & Failover Process** |  |  |
| **Enter / Create Queues (Hunt Groups) & Failover Process** |  |  |
| **Enter / Create Recordings** |  |  |
| **Add New Dial External Numbers** |  |  |
| **Add Page Groups** |  |  |
| **Add Voicemail Groups** |  |  |
| **Add Conference Rooms** |  |  |
|  |  |  |
| **AUTO ATTENDANTS:** |  |  |
| **Enter / Create Auto Attendants** |  |  |
| **Configure Auto Attendant Dial Options** |  |  |
| **Record / Upload Auto Attendant Recordings** |  |  |
| **Select Auto Attendant Failover Options** |  |  |
| **ON-HOLD OPTIONS:** |  |  |
| **Upload Music for On-Hold** |  |  |
| **Select Playlist options** |  |  |
| **Call Park Timeout** |  |  |
| **Enter Call Park Timeout (used for Hold also)** |  |  |
| **CUSTOM DEVICES:** |  |  |
| **Enter Name & Description of Custom Device** |  |  |
| **MULTI-EXTENSION DEVICES:** |  |  |
| **Select Device from Pulldown** |  |  |
| **Enter Name & MAC of Custom Multi-Extension Device** |  |  |
|  |  |  |
|  | | |
| **PORTAL CONFIGURATION – StarCenter Configuration** |  |  |
| **StarCenter Manager** |  |  |
| **Agents:** |  |  |
| **Add Agent ID** |  |  |
| **Add Agent PIN** |  |  |
| **Enter Agent First Name** |  |  |
| **Enter Agent Last Name** |  |  |
| **Allow Individual Queue Login (Y/N)** |  |  |
| **Auto-Answer All StarCenter Calls (Y/N)** |  |  |
| **Select Skills and Level (Add if necessary)** |  |  |
| **Skills:** |  |  |
| **Add new Skill name** |  |  |
| **Edit Skill to configure** |  |  |
| **Alerts:** |  |  |
| **Add new Alerts from pulldown & Select Options** |  |  |
| **Customer Options:** |  |  |
| **Set Time Zone** |  |  |
| **Set Daylight Savings Time** |  |  |
| **Set Agent Login Call Delivery Pause** |  |  |
| **Use Reason Codes (Y/N)** |  |  |
| **Set Reason Code Length (2, 3, or 4)** |  |  |
| **Add Reason Codes (Code, Name, Type)** |  |  |
| **Location Options:** |  |  |
| **Away State Change on Call Pickup (Y/N)** |  |  |
| **MULTI-QUEUE MONITOR:** |  |  |
| **Using the pulldown, Add Queue(s) to monitor** |  |  |
| **Click Save Current Group** |  |  |
|  |  |  |
| **PORTING:** |  |  |
| **Confirm Customer Port Date / Time** |  |  |
| **Incoming Call Routing:** |  |  |
| **Assign Porting DIDs to their specific location – day before port** |  |  |
| **Once ported test call routing** |  |  |
|  |  |  |
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| **On-Site Training:** |  |  |
| **Review Extension listing** |  |  |
| **Conduct Phone Training** |  |  |
| **Work specifically with the Receptionist – Transferring, Forward, VM etc.** |  |  |
| **Review Incoming Call Routing** |  |  |
| **Review Ring Groups** |  |  |
| **Review Queue Groups** |  |  |
| **Review StarCenter Agents / Queues (where applicable)** |  |  |
| **Have Admin Launch StarView (where applicable)** |  |  |
| **Have Admin download & Install Application Framework (where applicable)** |  |  |
| **Work with Customer Admin for 1 week to finalize changes** |  |  |
| **Follow-Up with Customer** |  |  |
|  |  |  |
| **Follow up with customer after 1 week to review all configurations** |  |  |
| **Follow up with customer after 30 days again to review configurations** |  |  |