

Clean Order Handoff Guide

Please follow this process in order to provide the best customer experience:
Point of Sale → Implementation → Installation

SALE COMPLETED:

Sales should confirm the following, and have customer sign where applicable.

- Final estimate of services sold
- Contract
- Letter of Authorization

(A LOA is required for any telephone number or toll free number being ported and one LOA per carrier being ported from is required)

Those documents should be gathered by the sales rep or agent and the order will be submitted through the Velocity Telephone internal order form. Key items that must be included on the order are:

- Customer's main telephone number
- Customer's current providers:
 - Local telephone
 - Internet service
 - Long distance

Once the order is submitted it will be reviewed and assigned to a Velocity Implementation Rep, who will make direct contact with the customer within 1-3 business days to schedule an implementation meeting and network analysis.

IMPLEMENTATION & NETWORK ANALYSIS:

Velocity Implementation Rep will gather the following specifics:

- Verify all phone numbers current function and intended function (for porting).
- Gather network information, LAN layout (physical, logical).
- Determine any red flags, and discuss them (network layout, Internet connection type and speed).
- Determine intended call flow.
- Names or designations for each telephone to be installed.
- Email addresses for any voicemail or virtual fax notifications.
- Discuss differences between VoIP versus POTS/ Traditional PBX (E911, reliability, dependency on Internet connection).
- Determine the requested installation date, discuss the porting process, and timeline restrictions.

INSTALLATION:

After the implementation meeting is complete, if there are red flags or items that require sales attention the order will be sent back to the agent or sales rep to discuss with the customer. If there are no red flags, or after those items have been addressed properly by sales, the installation date will be set. The implementation rep will then begin the port process, provisioning and preparation of phones. On the installation date we will port all applicable telephone numbers, install phones and provide training to all staff requested by the customer.