

Hosted PBX Onboarding Checklist

Customer Name: _____

Address: _____

City, State, ZIP: _____

Contact Name: _____

Contact Number: _____

Who will be the PBX administrator?

Intended Installation/Service Activation Date:

Administrator's email for sending info and desired implementation of equipment templates

Do you have your own SIP phones (BYOD)?

What make / model phones? -

Do you have your own separate switch and patch cables for the voice network at the MDF/IDF? - yes / no

If not, how many switches and patch cables do we need to provide?

Are we configuring for PoE (Power Over Ethernet)? -

How many Local DIDs to assign? -

NPA/NXX of DiDs (geographic location for DiDs): - State, Area Code, Exchange

How many Toll Free DiDs to assign? -

Do you have Broadband Internet access? - yes / no

Is this SHARED Internet Access? - yes / no

STATIC or DYNAMIC IP Assignment? - static / dynamic

If STATIC what is the IP range, subnet mask and default gateway?

What type of ISP connection?

___ DSL (Speed) Upload ___ Kbps Download _____ Kbps

For DSL does the customer have a: ___ DSL MODEM or ___ DSL ROUTER

For PPPoE, please provide PPPoE Username and Password:

___ Cable (Speed) Upload _____ Kbps Download _____ Kbps

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Which do you have?

_____ Cable Modem or _____ Cable Router

___ T1 Dedicated (Speed) Upload ___ Mbps Download _____ Kbps

___ T3 Dedicated (Speed) Upload ___ Mbps Download _____ Mbps

If T1/T3, do you own the T1 CPE? _____

___ FiOS: (Speed) Upload _____ Mbps Download _____ Mbps

___ Other: _____

Do you have a firewall?

Firewall Manufacturer and Model:

Do you manage your firewall yourself? yes / no

How many PC's are on your network?

Is there at least one CAT5 (or better) Ethernet cable available where each phone is stationed? - yes / no

Is the CAT5 cable terminated with FEMALE RJ45 jack at work station to patch panel at closet? - yes / no

Are there daisy chained switches on the network? - yes / no

How many workstations are plugged into the switches?

Is a network drawing available? - yes / no

How many phones are being installed "off site"? -

Do you have overhead paging? - yes / no

What is the make and model of the paging equipment (paging unit, amplifier etc)?

Is an IT Consultant involved? - yes / no Contact information _____

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