



Phone: (800) 435-9332 2112 W. Kennedy Blvd. Tampa, FL. 33606 Fax: (800) 421-9973

Telephone Answering Service Client Account Setup

Please complete setup forms, however all may not apply. Once completed please sign, date, and return.

1. Date service is to begin? _____
2. What is the name of your business? _____
3. Who is our contact person? _____
4. What is your business Email address? _____
5. What is your business address? _____

6. Please provide basic driving directions to your location from a Landmark or Major Intersection: _____

7. Time Zone (Ex. E.S.T, M.S.T)? _____
8. If billing address different, please give _____

9. What is the nature of your business? _____
10. If property management, how many units on property? _____
11. What are your normal hours of operation? _____
12. What times/days will we answer for you? _____
13. Choose an account password (optional): _____ (This password will be required before any changes or updates will be made to your account. Opting for no password may result in unauthorized changes to your account.)
14. How would you like us to answer your phones (answer phrase)? Our standard answer phrase is "Thank you for calling _____, this is _____, how may I help you?" Is this acceptable?
If not, how would you like us to answer?

15. What is your business phone number? _____

16. Do we accept collect calls on your account? YES NO

17. What is your fax phone number? _____

18. Do you have any additional office phone numbers? _____

19. Is there a primary on-call digital pager? _____

20. Is there a primary on-call alpha-pager number? _____

21. What is your alpha-pager pin number? _____

22. Who is your paging company? _____

23. What is your alpha-pager modem number? _____

24. Is there a primary o/c cellular phone number? _____

25. Do you have any additional phone numbers? Please list: (Example: Corporate office, 2nd fax line, etc.)

26. **If you have purchased** a fax/email summary, what days/times would you like it? _____

27. **If you have purchased** "Client Web Access" please choose a username and password:

Username: (Please choose an email address where you receive email) _____

Password: (Please choose any combination of letters and numbers) _____

28. What do you consider to be an emergency? (**Be very specific, this information will be used by operators to deliver messages appropriately. Assume nothing**)

29. What are your emergency message delivery procedures?

30. Please list the emergency message protocol we are to follow if there is no response from your first choice (Example: we are first to call Mr. Doe, but he does not answer, what do we do then?)

31. What do you consider to be a routine message? (Example: Personal phone calls, solicitor calls, etc.)

How do you wish them delivered? (Fax or e-mail each, hold for fax or e-mail summary, etc.)

32. What customer information needs to be included when we take a message?

33. Do you wish us to disclose that we are a message center? Never When Asked Always

***** If “ Never ” is checked: We will do our utmost not to reveal we are your message center, however, our policies prohibit us from being dishonest or lying to callers. In emergency situations or if the caller persists, we will always reveal we are your message center *****

34. It is our standard operating procedure to give out the name of your business, your address, your main phone number and your fax number when asked by the caller. Is this acceptable? YES NO
If no, what information, if any, do you wish us to disclose?

35. Is there any other information we need to service your account? (Example: PO numbers, client lists, property listings, on call schedules,etc

