

VoIP Call Flow Worksheet

1. Business Information

Company Name:

Main Phone Number(s):

Main Fax Number(s):

2. Business Hours

Monday:

Tuesday:

Wednesday:

Thursday:

Friday:

Saturday:

Sunday:

After Hours Handling (choose one)

- Send to voicemail
- Ring group
- Play message only
- Forward to another number:

Holiday Hours/Closures

List or attach holiday schedule:

3. Incoming call handling (core flow)

When someone calls your main number, what should happen first?

- Ring immediately (all phones / select phones)
- Play greeting then ring
- Use auto attendant menu

4. Ring groups

Ring groups are grouping of phones that ring at the same time. Example: If the HR dept has 3 users and phones, and someone calls or transfers to HR, the 3 phones would be grouped together and ring together.

Group name:

Group name:

Members:

Members:

5. Auto-Attendant Menu

Main greeting script: Print or email to us

Hours, location, & fax number added as menu option: Yes / No

<u>Key press</u>	<u>Action (example: Press 1 for Sales, Press 2 for Billing)</u>
------------------	---

1

2

3

4

5

6

7

8

9

0

6. Voicemail Setup

General (company) voicemail with email transcription: Yes / No

If yes, which email addresses should receive them:

Voicemail greeting script: Print or email to us

7. Call Routing Rules

Ring duration (seconds):

If no one answers, send to:

Voicemail

Forward

Try another ring group

8. Special Routing (Optional)

Call forwarding / lunch routing / emergency option

Details:

9. Phone Config (Parks)

Park slots are used to place callers on hold. If a caller is on hold on Park 1, anyone can pick up park 1 to answer the call. Same for park 2, park 3, etc.

How many park buttons will you need? (how many callers will you have on hold at the same time waiting for the call to be picked up) 2 to 3 are the most common, and can be changed at any time.

Number of parks needed:

10. Phone Config (BLF keys)

There are 10 blf (line key buttons) on the phone. The first button (upper left) is always your user extension. If more than 10 are needed, the last button (bottom left) turns into a 'next page' button. You can have a total of 3 pages. The most used user extensions and the park buttons should always be on page 1.

Which users will you call or transfer to the most?:

11. Call Routing Helper

List what most people call in for, from most to least common. Example for medical: 1. to make appointments, 2. billing questions, 3. to refill prescriptions, etc.

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.