



VoIP Phone System Discovery Form

Company Information

Company Name:

Primary Contact:

Email:

Phone:

Users & Locations

Number of users:

☐ In-office ☐ Remote ☐ Hybrid

Expected staff changes (12–24 months):

Phone Numbers

☐ Local numbers ☐ Toll-free numbers ☐ Fax numbers

How many total numbers?

☐ Keep existing numbers

Call Handling

☐ Automated greeting / menu

☐ Ring groups ☐ Call queues

☐ After-hours routing ☐ Holiday schedules

Call Volume & Compliance

Approximate calls per day:

☐ Inbound

☐ Outbound

☐ Both

☐ Call recording required

Recording retention period:

Faxing

☐ No faxing

☐ Physical fax machine

☐ Electronic / email fax

Estimated pages per month:

Phones & Devices

☐ Desk phones

☐ Softphones

☐ Mix of both

Shared phones needed?

Internet & Support

Internet provider:

☐ Backup internet available

☐ Fully managed VoIP

☐ Co-managed VoIP

Target timeline:

Additional Notes

Send to: nathan@advantecsolutions.com