



141 Friends Lane Suite 200, Newtown, PA 18940  
 Ofc: (215) 968-7800 Fax: (215) 458-4310

Keystone Answering Service  
 141 Friends Lane, Suite 200  
 Newtown, PA 18940

[www.keystoneansweringservice.com](http://www.keystoneansweringservice.com)  
[info@keystoneansweringservice.com](mailto:info@keystoneansweringservice.com)

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## Subscriber Application



### General Information

Company Name		Contact Name		Requested Service Start Date:			
Main Office Address			City		State	Zip Code	
Billing Address (If different than above)			City		State	Zip Code	
Main Office Phone Number		Alternate Office Phone Number		Inside Line Phone Number			
Main Office Fax Number		Office Email Address		Company Website Address			
Please indicate any information that should not be provided to callers.							
Phone Numbers		Fax Numbers		Email Addresses		Website Address	
Please list your normal office hours (i.e. Open 8am, Lunch 12N-1pm, Close 5pm):							
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Open							
Lunch							
Close							
All account updates and changes must be made in writing via fax or email. Please list all personnel who are allowed to make changes to the answering service account:							
If more than one office location will forward to this account, please explain or complete a separate application for each office, as appropriate.							
How did you hear about Keystone?							
Referral		Website		Phone Book		Other	

**Taking Messages**

Typically there are three types of calls: Caller Emergencies, Business Related Emergencies, and Routine Calls. Please consider each type of call. What information do we need to gather? Who needs to be contacted in each situation? How should they be contacted? We can create multiple message slips, as necessary.

**Caller Emergency Calls (Calls that will go to on-call personnel)**

A typical message slip contains the following information:	
For: _____	What additional information must we acquire? _____
*Caller ID Name: _____	
*Caller ID Number: _____	
Caller Name: _____	
A/C & Tel#: _____	We do not have Emergency Messages**
Msg: _____	**Please make sure to discuss timely delivery methods with your sales representative.

**Business Related Emergency Calls (Building emergencies, alarms, personnel issues)**

A typical message slip contains the following information:	
For: _____	What additional information must we acquire? _____
*Caller ID Name: _____	
*Caller ID Number: _____	
Caller Name: _____	
A/C & Tel#: _____	Alarm Company Name: _____
Msg: _____	Alarm Company Telephone #: _____

**Routine Calls**

A typical message slip contains the following information:	
For: _____	What additional information must we acquire? _____
*Caller ID Name: _____	
*Caller ID Number: _____	
Caller Name: _____	
A/C & Tel#: _____	
Msg: _____	We do not accept Routine Messages**
	**Selecting this option will require a call screen and/or appropriate greeting.

\*Keystone will provide the Caller ID Name and Number in the message slip when available.

Do you have a database of client information to provide Keystone, such as client names, phone numbers, address, customer account number, or any other information you will want from the caller?      Yes      No	
If yes, please forward the information to <a href="mailto:donna@keystoneanswerservice.com">donna@keystoneanswerservice.com</a> . We prefer comma delimited (.csv) or MS Excel (.xls) data formats; however, other formats may also be compatible with our software.	
*Would you like Keystone to archive all inbound messages?	Yes      No
*Nominal fee will apply.	

**Relaying Messages**

Please use the list of contact methods below to determine how to best contact the on-call, the number of attempts to reach the on-call before attempting another option, and the time between attempts until the message has been relayed. Please be advised that Keystone is not responsible for delays, outages or interruption of service created or caused by cellular carriers, paging carriers, E-mail servers, or Internet Service Providers.

**\*\*WE STRONGLY RECOMMEND A UNIFORM PROTOCOL FOR ALL ON-CALL PERSONNEL\*\***

<b>Contact methods:</b>	<b>Example</b>
<b>Text Message (SMS)</b>	<b>Step 1:</b> _____ (Text Message SMS)
<b>Cell Phone Email</b>	<b>Then wait:</b> _____ (15 minutes)
<b>Call Cell Phone</b>	<b>Step 2:</b> _____ (Call Cell Phone)
<b>Call Office/Inside Line</b>	<b>Then wait:</b> _____ (15 minutes)
<b>Call Residence</b>	<b>Step 3:</b> _____ (Call Residence)
<b>Alpha Page</b>	<b>Then wait:</b> _____ (5 minutes)
<b>Digital Page with Caller's Number</b>	<b>Next step:</b> _____ Contact Backup O/C
<b>Digital Page to Answering Service</b>	
<b>Patch/Connect Call</b>	
<b>Web Retrieval</b>	
<b>Email</b>	
<b>Fax</b>	
<b>Other (Please Specify)</b>	<b>Backup On-Call Contact Procedure:</b>

Are there special instructions for relaying messages during *office hours*?

Are there special instructions for relaying messages during *lunch hours*?

\*\*\*Please inform staff that when they sign out at night, it is a good practice to confirm on-call information with the Keystone agent. In addition, on-call staff should periodically check in for messages to check for call activity. If your staff has any questions, please ask them to speak to the supervisor on duty. \*\*\*

**Daily Message Report and On-Line Message Retrieval**

Please complete the section below detailing how you wish to receive a copy of your messages.

**\*\*WE RECOMMEND SCHEDULING MESSAGE REPORTS AT THE SAME TIME EVERY DAY\*\***

Fax: Keystone can send a recap fax of all messages. This fax can be sent to multiple fax numbers if necessary.

Fax Number(s): \_\_\_\_\_

Day(s) of Week: S M T W T F S Time of Day: AM PM

Email: Keystone can send a recap email of all messages. This email can be sent to multiple email addresses if necessary.

Email Address(es): \_\_\_\_\_

Day(s) of Week: S M T W T F S Time of Day: AM PM

Online Message Retrieval: Please provide user logon names and passwords for access to read, file, and print messages from our website. Please visit [www.keystoneanswerservice.com](http://www.keystoneanswerservice.com). This option provides unlimited access to your messages from the Internet.

User: \_\_\_\_\_ Password: \_\_\_\_\_

User: \_\_\_\_\_ Password: \_\_\_\_\_

User: \_\_\_\_\_ Password: \_\_\_\_\_



**Call Forwarding**

Call Forwarding is a feature provided by your local telephone service provider. You must have call forwarding enabled on all telephone numbers that will be forwarded to the answering service in order for us to receive calls. Keystone is not responsible for issues involving call forwarding. Any issues regarding forwarding or phone service should be referred to your local telephone service provider. There may be several call forwarding options available in your area. Please be sure to discuss these options with our sales representative. The telephone numbers forwarded to Keystone will use:

Basic Call Forwarding                      Busy/No Answer Forwarding                      \*Remote Access Call Forwarding

\*Remote Call Forwarding Access Number: \_\_\_\_\_

\* Remote Pin Access Code: \_\_\_\_\_

\* Telephone number(s) to be forwarded: \_\_\_\_\_

Would you like Keystone to check your call forwarding daily?                      Yes                      No                      Time: \_\_\_\_\_

If call forwarding is not connected, who should we contact? \_\_\_\_\_

**Cost Saving Options for Answering Calls**

**Call Screens**

To control costs, consider using our VoiceNet system for routing calls or to help control call volume. The VoiceNet can play predefined greetings based on the time of day and day of week to help personalize your company’s needs and requests. An effective call screen can reduce costs substantially. If interested, please discuss this feature with our sales representative. **On-Call personnel can always bypass call screen recordings by pressing the “9” key.**

Sample Script: “Thank you for calling \_\_\_\_\_. Our offices are closed at this time. If you would like to leave a message for the office or if you need to speak with the On-Call, please remain on the line. Please note, your call may be monitored for quality assurance...”

Enable a call screen for this account. Please forward the script to [donna@keystoneanswering.com](mailto:donna@keystoneanswering.com).

**Personalized Auto-Attendant (PAA)**

Accounts that do not utilize call screens will have a custom recorded PAA. The purpose of the PAA is to make sure that every call is answered by the fourth ring. This assures callers they have reached the correct number and will be assisted promptly. PAA recordings reduce hang ups and repeat dialing.

**Answer Phrase Greeting**

Please indicate how you would like our agents to answer. e.g. Good (morning/afternoon/evening), Your Company Name, how may I help you? Please note that if you do NOT want us to accept routine office messages from callers, then “Message Center,” “Answering Service,” or “Emergency Line” should be included as part of the greeting.

Desired answer phrase:

(Max **80** characters) \_\_\_\_\_

**Voicemail**

Voicemail boxes are an additional call screen or delivery option. A voicemail box can be used in conjunction with a call screen where the caller would have the option of leaving a voicemail message themselves or messages taken by agents can be relayed into voicemail for retrieval at your convenience.

Call Screen with Voicemail Option                      Agent Voicemail Delivery Option                      Not Applicable

**Other Considerations and Authorization**

Keystone requires 30 days notice to cancel service. Our “Terms & Conditions of Service” are printed on the reverse side of each invoice. Invoices are generated on a 28 day billing cycle. First invoicing may be a prorated invoice. *The account is always available for use 24 hours a day, 365 days a year.* Advance notice of unusual or anticipated heavy call volume is appreciated so that we may staff accordingly. Our service can only be as good as the information provided to us. All changes to account information affecting your operations, including types of calls, on-call staffing coverage, work schedules or contact information should be provided to us in writing.

By signing below I authorize Keystone to obtain a private telephone line for call forwarding usage and to program the information contained in this subscriber application into its computer system for the expressed purpose of providing telephone answering services to the company or organization listed below. I understand that the stated company or organization will be responsible for programming and activation charges as set forth in the pricing proposal and for the payment of recurring service and usage charges that are billed in accordance with the pricing proposal. I further agree to promptly notify Keystone of any operational changes that may affect the handling of our calls and to promptly inform Keystone of any service problems adversely affecting the timely delivery or accuracy of any messages taken on our behalf.

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Name

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Title

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Company or Organization

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Date