KEYSTONE
Answering Service™

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

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www.keystoneansweringservice.com
info@keystoneansweringservice.com

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ATSI MEMBER ®

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 donna@keystoneansweringservice.com. 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

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

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.keystoneansweringservice.com. This option provides unlimited access to your messages from the Internet.

User: _____   Password: _____

User: _____   Password: _____

User: _____   Password: _____

On-Call Personnel Information

Do you have a database of On-Call personnel information to provide Keystone, such as names, phone numbers, carriers, email addresses, or other contact information?   Yes   No

 If yes, please forward the information to donna@keystoneansweringservice.com. We prefer comma delimited (.csv) or MS Excel (.xls) data formats; however, other formats may also be compatible with our software.

If not, please complete the information sheet below. The more information provided to us, the better our service levels and timely responses can be. If more space is needed, please submit information on a separate sheet.

Please note: the policy of Keystone is to NEVER give out personnel information, including the telephone numbers below.

Name	Cell	Cell Provider	Home	Office	Inside Line	Alt Number

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@keystoneansweringservice.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.

_____

Name

_____

Title

_____

Company or Organization

_____

Date