**Shape, icon, circle

Description automatically generated**

**Set-Up Form**

**ACCOUNT SET-UP CHECKLIST**

Complete our direct debit mandate: <https://pay.gocardless.com/AL00011HBV0CKF>

Return the completed version of your contact list.

Email us any FAQs.

Email us any product or service information (including service areas etc).

Email us the details you wish for us to capture on your calls/call handling instructions.

**RETURNING THE SET-UP FORM**

While most clients prefer to hand deliver the form or scan it through, you may post it back to us. Please let us know via email how you wish to return this form.

Hero PA, 10 Kings Court, Harwood Road, Horsham, RH13 5UR.

**COMPANY INFORMATION**

Company registration number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Legal company name\* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Trading name\* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address\* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

PostCode\* *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

Main telephone number for the company\* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Main fax number for the company \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Main email address for the company\* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Website address\* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Industry\* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**BILLING SCHEME**

*(For pricing, please refer to the pricing matrix or communication sent to you).*

Please tick your preferred monthly billing scheme below.

Whizz PAYG

Kapow 60

Boom 150

Zap 300

Whoosh 500

Call Centre Plus

Call Centre Advanced

Call Centre Pro

When do you require our answering services? \*

Monday-Saturday 08:30-18:00

24/7/365

**OPTIONAL EXTRAS**

*(For pricing, please refer to the additional service sheet).*

Please tick any optional extras below.

OOH Personalised Voicemail - ***Recommended*** *–* £5 Per Month

Additional DDI - £10 Per DDI, Per Month

Live Chat Management - £120 Per Month + £3.50 Per ‘Interaction’

**ANSWERING INCOMING CALLS**

Our default greeting is:

Good [TOD] thank you for calling [COMPANYNAME], [NAME] speaking, how can I help?

Please indicate if you are happy with this greeting\* **YES NO**

If you would like us to greet your callers in a different way, please specify below.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**VOICEMAIL**

If you have selected to add-on the OOH personalised voicemail, please compete the below or write “N/A” if you have not added this on above.

Preferred email for us to send voicemails to\* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Before your account goes live, you will receive an email from us detailing a telephone number to call with a security pin to record your personalised voicemail.

**BUSINESS OPENING HOURS**

Please specify the opening hours of your business.

Monday: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Tuesday: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Wednesday: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Thursday: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Friday: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Saturday: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Sunday: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bank Holidays: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**TYPES OF CALLS**

What type of calls are we expected to receive? \* (*Please select everything applicable)*

Message Taking

Switchboard Services

New Enquiries

Emergency Callouts & Escalation

Reservations, Appointments & Bookings

Arranging Quotations

Complaint Logging/Handling

Technical Support

Order Taking

Support & Ticketing