

GOTOCONNECT ADMIN CHECKLIST

Items to Consider

- What is your scheduled go-live date?
- Are you planning on using GoToConnect Mobile, web apps or both?
- Did you purchase phones from GoToConnect or will you be using existing phones?
- Consider how you want inbound calls to route.
- Do you plan on using third-party services to integrate with GoToConnect?
- Are your organization's employees in an office or are they remote?
- Do you plan to use your existing phone numbers or are you ordering new numbers?

Items that might influence the go-live date:

- Porting existing numbers to GoToConnect takes on average 15 days. (New numbers are instant)
- Equipment purchased with standard shipping arrives in 7-10 business days.
- Is your office space ready for the transition (are you moving to a new office address?)

If you are using your existing phones:

- Note step five

GoToConnect integrates with top providers

- Note step seven.
- [Click here to view our list](#)

Step One: Account Creation & Prep

[Welcome to Jive email completed](#)

Attend training

- [Basics & Advanced](#)

Identify stakeholders

- Additional admin
- Internal communication
- Internal support
- Training

New Accounts

- Completing the order information in your Welcome to Jive email is the critical first step to ensuring the activation of your Jive account.

Stakeholder Types

- Additional Admin: Shared responsibility for configuring Admin portal, dial plans, adding new users and phone numbers
- Internal communication: responsible for messaging GoToConnect launch to employees, sharing training and support resources
- Internal or external support: Will you have a set up team?
- Training: All users need to visit Embark to attend free GoToConnect training

Step Two: Users

Ensure all new users are in the system

- Welcome to Jive Email (see Step One)
- [How to add new users](#)

New Users

- Welcome to Jive
 - New users are added via the Welcome to Jive email sent at the time of account activation. Additional new users are added manually or contact the Set Up Team for more information.

Adding New Users

- All employees using a desk phone or soft phone are required to have a "user" profile in the admin portal.
- As new employees join your organization, they can be added manually via your Admin console.
- New users will automatically receive an email to create a password for their new GoToConnect account

Step Three: Telephone Numbers

Activate telephone numbers

- [Using your existing numbers](#)
- [Ordering new numbers](#)

Optional but recommended:

- [Using a Temporary Number – Perfect for testing your implementation until your numbers are ported.](#)

Several Options for Telephone Numbers

- **Existing numbers:** porting your existing numbers averages two business weeks and should be initiated in the first few days of activation. Contact the Set Up Team for assistance.
- **New Numbers:** The "Order new numbers" button is located in the Admin Portal under Phone System > Phone numbers. Numbers are instantly added to your account.
- **Temporary Numbers:** Service bridge if your organization prefers to go live before the existing numbers are ported. Contact the the SetUp Team for assistance.

Step Four: Check Your Network

Install GoTo Network Test tool

Obtain test results

Optimize based on test results

GoTo Network Test Tool

- Must be installed and run on a computer that is on the same network as your new GoToConnect phones. Review the benefits and access the tool here:
 - [Windows & Mac](#)
- Review test results: [Click here to review test results](#)
- [Optimize: review how to optimize your network for VoIP](#)

Step Five: Adding Phones

GoToConnect (soft) Phones

Desk phones

- New phones from GoToConnect: plug and play
- Existing phones: Add hardware to your PBX

GoToConnect (soft phone) Desktop, Web, Mobile

- Ensure new users create their account password. An email with instructions is automatically sent when a GoToConnect user is created in the admin portal.

Desk Phones

- [Purchased from GoToConnect](#)
- [Using existing phones](#)
- **If you are using physical phones, you must disable SIP ALG on your router/firewall. See step Four above.**

Step Six: Inbound Call Flow

Configure your inbound call flow (Dial Plan)

- [Small Business](#)
- [Med Business](#)
- [Large Business](#)

Common Items Included in a Call Flow

- Call Schedules – Hours of Operation Rules
- Sound Clips – Automated Attendant
- Groups and Queues
- Voicemail
- Devices

Step Seven: Integration

Third-party integration with GoToConnect completed

- Legal
- Medical
- Automotive
- Microsoft
- Financial
- Real Estate
- Professional Services
- And More!

For a successful implementation with integrations, it is recommended steps 1 – 6 be completed first.

[View the full list of support integrations.](#)

Step Eight: Test Run

[Route your telephone numbers](#)

Perform a test call

Step Nine: User Training & Launch

Send announcement email to employees

Provide employees with [the link to Embark to start training](#)

Provide employees with the live date for GoToConnect

Run reports to track adoption and optimize usage

User Training

Encourage users to visit Embark, GoToConnect's training portal for both new users and admins. Embark is free, convenient, and easy to use.

- [GoToConnect User Training](#)
- [GoToConnect Admin Training](#)

Key Resources

- Contact the GoToConnect Set Up Team
- [Admin Training: Visit Embark for Admins](#)
- [User Training: Visit Embark for Users](#)