VIRTUAL OFFICE

The freedom of global collaboration

Client Onboarding Questionnaire

Welcome to Virtual Office! This onboarding questionnaire will assist you in collecting critical information needed to transition your company smoothly to the Virtual Office platform. Please fill out the form and return it to your Onboarding Specialist or support@vofficglobal.com. Once this information is received a detailed implementation schedule will be prepared for your company. Please note that the onboarding process typically takes about two weeks from start to finish.

General Information

Company Name: _____   Date: _____

Address: _____

_____

Primary Contact:

Name: _____

Email: _____

Phone: _____

> Note: Your Primary Contact is responsible for the following:
>   a) One on one training for your staff
>   b) Local administration
>   c) Responsibilities during the onboarding process:
>   i) Fill out Onboarding Questionnaire form
>   ii) Imports, Company Share, Create User Accounts
>   iii) Front Line Support

Rush Onboarding Requested?   YES*   NO   Desired Rush Onboarding Date: _____
*Additional fees may apply

Domain / SSL Information

Domain Name: _____

1. Is this an existing domain?   YES*   NO
     *If YES, please complete the DNS Modification Form

2. Is a SSL certificate established on the existing domain or web access URL?   YES*   NO

     *if YES, please complete the SSL Revocation Form

     If NO, Virtual Office will provide an SSL certificate from GoDaddy at no additional charge.

User Accounts

1. **Please complete the User Accounts Worksheet** to identify individual users and assign the services each requires.

2. **Administrators**
   Please list your company's internal administrators and their contact information below. It is important to know that administrative users will have full access to view all company accounts and data therein, can modify user access, assign sharing rights, process administrative requests with VO Customer Service / Support, and more. Additional administrators are sometimes legal or compliance staff, HR personnel, senior management, etc.

Name	Email	Phone

* Additional fees may apply per administrator. Compliance and/or regulatory requirements or restrictions may apply.

Company Logo

Your company logo is needed to customize your login pages and other elements of the Virtual Office interface.

Please provide your logo as electronic files in the following formats:

- 300x48 pix PNG transparent
- 200x28 pix PNG transparent
- You may also provide a separate PNG logo file for email signatures in any size you require.

Note: Please see the Onboarding FAQ for tips on how to obtain the correct file type and sizes of your logo. If you do not have a logo, or need help securing the correct files, Virtual Office can provide referrals to qualified graphic designers. Please contact your Onboarding Specialist for more information.

Best person to contact if Virtual Office has any questions about your logo: _____

Phone: _____ Email: _____

Distribution Lists and Security Groups*

Distribution Groups - Companies often use distribution lists to share information among teams, groups or key resources. For example, emails delivered to "info"@yourcompany.com can be shared to all customer service employees, or "careers"@yourcompany.com can be shared to key human resource personnel.

Security Groups - It is possible to assign security profiles by groups. For example, you can define a security group in which all members have access to a particular folder, or to modify data in a VO tab but members outside the security group can view only. Please contact your Onboarding Specialist for more details.

If your company requires either of these features, please complete the Distribution Lists and Security Groups Worksheet to identify all lists and/or groups needed and the members who belong to each.

*Compliance and/or regulatory requirements may apply.

Mobile Device Snapshot

Virtual Office enables on-the-go access to user account data on virtually any mobile device with an internet connection, from smartphones to tablets. To help us configure your account accurately, please tell us the types of mobile devices that your team will use to connect. Please check all that apply.

Device Type: Smartphone   iPhone / iPad   Blackberry

Company User Default Settings

The Virtual Office platform allows for a wide variety of customizable settings and features for users in your domain. These settings ensure common functionality and features among all your users, and also allow for these same features to be set for new users as you add them to your system. To save you time we have carefully designed a "Default Class of Service" which includes the most common and useful settings for users, and will be provided to your domain at onboarding.

If your company prefers to customize the default settings for your domain, please request a Default Class of Service Worksheet from your Onboarding Specialist. This option may be best suited to companies that maintain policies for the following:

- Password requirements
- Failed login access restriction
- Email Retention
- Mobile Access

Only <u>one</u> Default Setting profile is permitted per domain.

Your Current System

To transition your company as smoothly as possible, it is helpful for us to understand what tools you are currently using.

1. **What is your existing email solution?** (Please check all that apply)

    ___ Microsoft Exchange
    ___ Lotus Notes / Domino
    ___ Hosted Solution _____
    ___ Other _____

2. **What is your existing email Client?** (Please check all that apply)

    ___ Microsoft Outlook
    ___ Microsoft Outlook Express
    ___ Thunderbird
    ___ Web-Based Email (Yahoo Mail, Gmail, Apple Mail, Hotmail, etc.)
    ___ Other _____

Emergency Contact Information

Virtual Office maintains emergency contact information for each client. This contact information is used to communicate with your company in the event of a system outage or other unexpected event that could affect your ability to access Virtual Office for an extended period of time. Should an event occur, VO will contact your designated representative via a non-Virtual Office email account, by phone, and/or text to provide a status update for the issue. Please provide at least one contact

Contact #1

Name: _____
    Non-Virtual Office email (i.e. Gmail, Hotmail, etc.): _____
    Phone number: _____
    SMS Text number: _____
    Preferred method(s) of contact: Non-VO Email   Phone   Text

Contact #2

Name: _____
    Non-Virtual Office email (i.e. Gmail, Hotmail, etc.): _____
    Phone number: _____
    SMS Text number: _____
    Preferred method(s) of contact: Non-VO Email   Phone   Text

For Virtual Office Use Only:

___ New Customer Setup   ___ Configuration Change

Received by: _____ Date:_____   Extended Service (ESP) Member?   YES   NO

VO Onboarding Specialist:_____

Scheduled Onboarding Completion Date: _____   Expedited Onboarding?   YES   NO

Scheduled Onboarding Training Date: _____

File path to User Information Worksheet: _____

File path to User Default Settings Worksheet: _____

Logos provided by client   YES   NO

      File path to logos: _____

- 300x48 pix PNG transparent file name: _____
- 200x28 pix PNG transparent File Name: _____
- Other PNG file name: _____

Contracted Design:

      Designer: _____   Est. Completion Date:_____

      Phone: _____

      Email: _____

VO Administrator:_____

      DNS Modification Form Required (all accounts)

      ___ VO   ___ Client

      Date Received: _____

      SSL Revocation Form Required

      Date Received: _____

      Archive Account Request Form

      Date Received: _____

Notes: