



# **COMMERCIAL AND INDUSTRIAL FORMS DETAILS**

## **1. BASIC SITE & CLIENT INFORMATION**

**Date of Site Visit:** \_\_\_\_\_

**Branch Name:** \_\_\_\_\_

**Sales / Engineer Name:** \_\_\_\_\_

**Client / Company Name:** \_\_\_\_\_

**Site Address:**

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**Industry Type:** \_\_\_\_\_

**Contact Person Name:** \_\_\_\_\_

**Designation:** \_\_\_\_\_

**Mobile Number:** \_\_\_\_\_

**Email ID:** \_\_\_\_\_

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## **2. WATER SOURCE & WATER QUALITY DETAILS**

**Water Source:**

☐ Borewell ☐ Municipal ☐ Tank ☐ Other: \_\_\_\_\_

**Approx. Daily Water Consumption:** \_\_\_\_\_

**Purpose of Water Usage:**

☐ Process ☐ Cooling ☐ Boiler ☐ Domestic ☐ Other: \_\_\_\_\_

**Water Hardness (PPM, if available):** \_\_\_\_\_

**Scaling Issue Observed:**

☐ Yes ☐ No

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**If Yes, describe:**

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### **3. EXISTING SYSTEM & PROBLEM IDENTIFICATION**

**Existing Water Treatment / Softener System:**

☐ Yes ☐ No

**Details of Existing System:**

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**Problems Faced by Customer:**

- ☐ Scaling
- ☐ High Maintenance Cost
- ☐ Frequent Breakdown
- ☐ Chemical Usage
- ☐ Other: \_\_\_\_\_

**Maintenance Frequency:** \_\_\_\_\_

**Customer Expectations:**

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### **4. AREA OF APPLICATION**

**Application Area:**

- ☐ Boiler
- ☐ Cooling Tower
- ☐ Heat Exchanger
- ☐ Pipeline
- ☐ Process Line
- ☐ Other: \_\_\_\_\_

**Pipe / Line Size:** \_\_\_\_\_

**Operating Pressure:** \_\_\_\_\_



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**Operating Temperature:** \_\_\_\_\_

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### **5. TECHNICAL & COMMERCIAL OBSERVATIONS**

**Ekotex Installation Feasible:**

☐ Yes ☐ No

**Recommended Ekotex Model / Capacity:**

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**Quantity Required:** \_\_\_\_\_

**Site Constraints / Risks (if any):**

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**Accessories / Modifications Required:**

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### **6. COMMERCIAL DISCUSSION SUMMARY**

**Customer Interest Level:**

☐ High ☐ Medium ☐ Low

**Budget Discussed:**

☐ Yes ☐ No

**Expected Decision Timeline:** \_\_\_\_\_

**Decision Maker Identified:**

☐ Yes ☐ No

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### **7. COMPETITOR & MARKET INFORMATION**

**Existing Competitor Solution (if any):**

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**Competitor Price Range:** \_\_\_\_\_

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**Customer Remarks / Comparison:**

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### **8. PHOTOGRAPHS & ATTACHMENTS**

- ☐ Site Photographs Taken
- ☐ Existing System Photographs
- ☐ Problem Area Photographs
- ☐ Drawings / Technical Documents Collected

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### **9. FOLLOW-UP & ACTION PLAN**

**Next Action Required:**

- ☐ Quotation
- ☐ Demo
- ☐ Technical Discussion
- ☐ Follow-up Meeting
- ☐ Other: \_\_\_\_\_

**Responsible Person:** \_\_\_\_\_

**Expected Follow-up Date:** \_\_\_\_\_

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### **10. EXECUTIVE REMARKS**

**Sales / Engineer Remarks:**

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**Overall Site Assessment:**

- ☐ Excellent   ☐ Good   ☐ Average   ☐ Not Suitable

**Conversion Probability (%):** \_\_\_\_\_

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Visited By (Name & Signature): \_\_\_\_\_

Date: \_\_\_\_\_

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**Note:**

This worksheet must be completed on the same day of the site visit and submitted as per company reporting guidelines. This document is mandatory for all commercial visits.