

NODE_OUT Quick Setup Form

Essential Information for Seamless Integration

Client Information

Company Name: _____

Primary Contact: _____

Phone: _____ Email: _____

Industry: _____

System Access (Admin Level)

Primary Business Software:

CRM/Project Management: _____

- ☐ Admin credentials available
- ☐ API access enabled
- ☐ Read/Write permissions confirmed

Email System: _____

- ☐ Business email platform: _____
- ☐ Shared inbox access: _____
- ☐ Auto-responder currently: _____

Phone System: _____

- ☐ Business line: _____
 - ☐ After-hours handling: _____
 - ☐ Call forwarding setup: _____
-

Current Workflows

Biggest Time Wasters (Top 3):

1. _____
2. _____

3.

Most Frequent Customer Questions:

1.

2.

3.

Manual Tasks Done Daily:

1.

2.

3.



Critical Boundaries

DO NOT AUTOMATE:

-

-

-

REQUIRES HUMAN APPROVAL:

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-

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EMERGENCY CONTACT:

Name: _____ Phone: _____ Available: _____



Business Patterns

Busiest Days/Times: _____

Seasonal Peaks: _____

Service Area: _____

Average Project Value: _____

Existing Integrations

Accounting Software: _____ Access Level: _____

Payment Processing: _____ Access Level: _____

Website Platform: _____ Admin Access: _____

Social Media Accounts: _____

Google Business Profile: _____ Manager: _____

Immediate Priorities (Rank 1-5)

___ Scheduling/Calendar Management ___ Customer Communication ___ Document Generation
(Quotes/Invoices/COCs) ___ Review/Reputation Management ___ Lead Follow-up/Nurturing

Authorization

I authorize NODE_OUT to:

- ☐ Access specified systems for integration setup
- ☐ Implement automated workflows as discussed
- ☐ Monitor system performance and make optimizations
- ☐ Provide ongoing support and maintenance

Signature: _____ Date: _____

Next Steps

Preferred Implementation Start Date: _____

Best Time for Technical Setup Call: _____

Preferred Communication Method: [] Email [] Text [] Phone [] Slack

Additional Notes/Special Requests:

This form provides everything needed to begin silent implementation while you focus on your business.