**Credentials & Access Call Sheet:**

**AccuLynx Technical Details:**

* [ ] **AccuLynx subscription level** - What features/API limits do they have?
* [ ] **Admin credentials** - Who has master access for integrations?
* [ ] **Multi-user setup** - How many people need access to what?
* [ ] **Data backup policies** - How is their data currently protected?
* [ ] **AccuLynx training level** - Are they using 20% or 80% of features?

**Email & Communication Credentials:**

* [ ] **Business email provider** - Gmail Business, Outlook, other?
* [ ] **Email authentication** - SPF, DKIM records set up for deliverability?
* [ ] **Shared inboxes** - Who sees what customer communications?
* [ ] **Email signatures** - Standardized across team?
* [ ] **Auto-responders** - Any existing automated email responses?

**Phone System Details:**

* [ ] **Business phone setup** - Landline, VoIP, cell forwarding?
* [ ] **Call tracking** - How do they measure lead sources?
* [ ] **Voicemail system** - Centralized or individual boxes?
* [ ] **After-hours handling** - Who takes emergency calls?
* [ ] **Call recording** - Any compliance requirements?

**Existing Tool Ecosystem:**

**Financial/Accounting Integration:**

* [ ] **QuickBooks access** - Desktop or Online? API available?
* [ ] **Payment processing** - Square, Stripe, other? Integration capabilities?
* [ ] **Banking** - Business accounts that need reconciliation.
* [ ] **Expense tracking** - How do they handle material costs, fuel, etc.?

**Marketing & Sales Tools:**

* [ ] **Website platform** - WordPress, Squarespace, custom?
* [ ] **Google Business Profile** - Who manages it? Reviews monitored?
* [ ] **Social media accounts** - Who has admin access? Posting frequency?
* [ ] **Lead sources** - Google Ads, referrals, door-knocking? How tracked?
* [ ] **CRM beyond AccuLynx** - Any additional customer databases?

**Operational Systems:**

* [ ] **Material suppliers** - Do any have online ordering systems?
* [ ] **Weather monitoring** - Any specific apps/services they trust?
* [ ] **Route planning** - Google Maps, specific logistics software?
* [ ] **Document storage** - Google Drive, Dropbox, AccuLynx only?
* [ ] **Team communication** - Texting, WhatsApp, Slack, other?

**Potential Landmines to Address:**

**Compliance & Legal:**

* [ ] **Insurance requirements** - Any specific documentation protocols?
* [ ] **Local licensing** - Permit tracking, COC requirements, inspections?
* [ ] **TCPA compliance** - Text message consent for automation?
* [ ] **Data retention** - How long must they keep customer records?
* [ ] **Worker classification** - Employees vs. contractors (affects scheduling)?

**Seasonal/Business Model Questions:**

* [ ] **Peak season** - When are they swamped vs. slow?
* [ ] **Emergency protocols** - Storm response procedures?
* [ ] **Service area** - Geographic boundaries for automation?
* [ ] **Project types** - Residential, commercial, insurance, retail?
* [ ] **Crew structure** - In-house teams vs. subcontractors?

**Hidden Workflow Dependencies:**

* [ ] **Material delivery coordination** - Who receives/inspects deliveries?
* [ ] **Customer key management** - How do they access properties?
* [ ] **Photo documentation** - Current process for before/after shots?
* [ ] **Quality control** - Who signs off on completed work?
* [ ] **Warranty tracking** - How do they handle callbacks/issues?

**💡 Smart Discovery Questions:**

1. **"What happens when someone calls in sick?"** (Reveals single points of failure)
2. **"How do you handle it when a customer changes their mind mid-project?"** (Change order workflow)
3. **"What's your process when materials arrive damaged?"** (Supply chain hiccups)
4. **"How do customers usually find out about delays?"** (Communication gaps)
5. **"What's the most annoying thing you have to do every single day?"** (Prime automation target)
6. **"When was the last time you had to manually fix something that went wrong?"** (Error-prone processes)

**Outcome Goals for the Call:**

**Walk away with:**

* Complete technical access roadmap
* Integration permission levels
* Current pain point priorities
* Hidden workflow dependencies
* Compliance/legal boundaries
* Seasonal business patterns

**Red flags to watch for:**

* Reluctance to share access levels
* "We've always done it this way" mentality
* Unclear process ownership
* Missing documentation
* Overloaded key personnel

This intel will help us build automations that feels like magic to them - seamlessly integrated and **anticipating their needs** before they even know they have them