

Creative Chats Onboarding Form

Client Information

1. Business Name: _____
2. Industry: (Banking) (Healthcare) (Agriculture) (Retail) (Tourism)
Other: _____
3. Primary Contact Person: _____
4. Role: _____
5. Phone: _____ Email: _____
6. Physical Address: _____

WhatsApp Setup

7. WhatsApp Number to Use: +265 _____
(We recommend a dedicated business number leave field blank and we can help with setting up a new number if necessary)
8. Preferred Display Name: _____
(e.g., "friendly neighborhood bot")

Bot Configuration

9. List your top 10 customer questions:
 1. _____
 2. _____
 3. _____
 4. _____
 5. _____
 6. _____
 7. _____
 8. _____

9. _____

10. _____

Standard replies for these questions:

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

*(Please attach any other relevant questions and answers in an appendix at the end of the document if necessary)

10. Languages Needed: English Chichewa Both

Advanced Features (Optional)

11. Integrations Needed:

Payment System (Specify: _____)

Booking Calendar

Inventory System

Other: _____ *(Additional charges may apply)

12. Special Requirements: *(Additional charges may apply)

Data & Compliance

13. Do you handle sensitive customer data? Yes No

If yes, describe: _____

14. Preferred Data Retention Period: *(Additional charges may apply)

30 days 90 days 1 year

Authorization

I confirm the information provided is accurate and authorize Creative Chats to configure my WhatsApp chatbot as described.

Signature: _____

Date: _____

Business Stamp (where applicable):