

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):