Brass Fax — Client Intake Checklist

Version 1.0 — Internal Use Only

# Overview

This checklist is used during client onboarding to ensure we collect all required materials and information to build their AI assistant quickly and accurately.

# Client Information

* Business Name
* Primary Contact Name
* Email Address
* Phone Number
* Website URL
* Preferred Communication Method (Email/Phone/Zoom)

# Content Collection

* Current website pages (URLs or HTML files)
* FAQs documents (PDF, DOCX, TXT)
* Company policies (Terms, Privacy Policy, Returns, etc.)
* Pricing documents or service lists
* Internal procedures or knowledge base content
* Sales or onboarding scripts (if available)
* Customer support canned responses (if available)
* Any additional documents they'd like to include

# Technical Setup

* Website platform (Wix, WordPress, Shopify, Squarespace, etc.)
* Access to embed code or permission to install
* Domain details (if DNS changes are needed)

# Tone of Voice & Assistant Preferences

* Preferred tone (Professional, Friendly, Casual, Playful, etc.)
* Escalation behavior (When to collect customer contact details)
* Business hours (for context in assistant answers)

# Billing Setup

* Confirmed pricing plan (Setup fee + Managed Service Tier)
* Invoice recipient name & email
* Billing address (if required for invoicing)
* Preferred payment method (Bank Transfer, Card, Direct Debit)

# Internal Notes

Special client considerations, exceptions, or custom requests.