iSpaniel Customer On-Boarding Forms

# Introduction

This document accompanies the “iSpaniel Customer On-Boarding Checklist” document and is intended to be completed electronically by a new customer.

Please complete the forms below to provide the initial information required to set up iSpaniel.

# Onboarding Forms

## Users

|  |  |  |
| --- | --- | --- |
| Name  | Email | iSpaniel Role |
|  |  | Admin |
|  |  | Program/Fill |
|  |  | Delivery |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Asset Types

|  |  |  |
| --- | --- | --- |
| Type | Portal Colour | Gallons |
| Example 1 | Blue | 9 |
| Example 2 | #55C26C | 18 |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Product Types

|  |  |  |
| --- | --- | --- |
| Type | Code | Portal Colour |
| Example 1 - Best Bitter | BEST | Green |
| Example 2 - Mild Ale | MA | #755841 |
|  |  |  |
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# Checklist

|  |  |  |
| --- | --- | --- |
| Item | Details | Complete |
| Accounting Package Details |  |  |
| Customer Export Provided |  |  |
| Mobile Phones With Contracts Purchased |  |  |
| User Details Provided |  |  |
| Product Details Provided |  |  |
| Asset Types Provided |  |  |
| Tags Received & Installed |  |  |
| Computer with internet available |  |  |
| WiFi network available |  |  |