

# B2B Client Onboarding Requirements Questionnaire

Please complete this questionnaire to help us understand your business requirements and technical ecosystem. This document will be used to configure your onboarding process.

## 1. Company Profile

Registered Company Name:

Trading Name (if different):

Company Registration Number / Tax ID:

Industry Sector:

Corporate Website URL:

## 2. Primary Contacts

### Onboarding Lead / Project Manager

Full Name:

Email Address:

Phone Number:

### Technical / Integration Lead

Full Name:

Email Address:

Phone Number:

### Billing & Accounts Payable Contact

Full Name:

Email Address:

Phone Number:

## 3. Technical & System Integration

Primary ERP / CRM System in use (e.g., Salesforce, SAP, NetSuite):

Preferred Integration Method (e.g., REST API, SFTP, Webhooks, Manual Upload):

Do you require Single Sign-On (SSO)? (Specify protocol, e.g., SAML, OIDC, or No):

Approximate volume of data records to migrate (if applicable):

## 4. Scope of Service & Operations

Expected Target Go-Live Date:

Estimated Monthly Transaction/Order Volume:

Number of Expected System Users / Licenses Required:

Primary Operating Currencies:

## 5. Compliance, Security & Legal

Key Data Security Standards Required (e.g., GDPR, SOC2, HIPAA, PCI-DSS):

Data Protection Officer (DPO) Contact Details:

Are there specific data residency or hosting location requirements? (Specify country/region):

## 6. Additional Comments & Special Requirements

Please note any other specific requests, custom workflows, or constraints below: