

Client intake instructions

Form rules / Upload with the blank, without client source files.

This is a fictional client project intake form. Prepare it as a reusable template for separate clients. The source documents for each fill are a client-profile PDF and a project-request PDF. Use only facts documented in that client's files; never infer a missing phone number, date or budget.

Field rules:

full_name: the person named as the client contact in the client profile.

company: the client's company, not Fyllyo or a service provider.

email and phone: that contact's email and phone as documented. Leave phone blank if absent.

address: the client mailing address from the client profile, as one line.

project: the project title from the project request.

start_date: the requested start date from the project request, formatted MM/DD/YYYY. Leave it blank if no date is given.

budget: the stated project budget in US dollars; use the digits without a dollar sign or thousands separators. Do not calculate a budget from other amounts.

prefer_email and prefer_phone: tick only the explicitly preferred method in the project request. If no preference is given, leave both unchecked. Never infer a preference from the existence of a phone number or email address.

Keep the blank form and these instructions separate from client documents. Each fill uses only the corresponding client's files. These instructions contain no real client information.