



## VAC CRM Pre-Installation Form:

### Organization Details:

1. Name :
2. Logo: *(Please attach with this mail)*
3. Address:
4. City :
5. State :
6. Pin Code:
7. Country:
8. Phone :
9. Website:
10. GSTIN:
11. Outgoing Mail ID, Password and SMTP Server:

### Organization Structure:

1. Organization Roles
2. Organization Flow Diagram
3. Permissions (e.g. Leads should be private., Tickets should be Public read only etc.)

### Users Details:

1. List of Users Name, Roles and Email IDs.
2. Maximum Users Limit

### Other Details:

1. Please Mention Tax Slab
2. Status for Stocks, Tickets, Leads etc
3. For Automated mails, please mention the events and mail contents.

*Please Fill the form and send to us. Based on that we shall prepare the CRM*

Hardware Checklist

- 1. HDD Capacity :
- 2. RAM :
- 3. Power Backup : Yes / No
- 4. Internet :
- 5. Static IP :
- 6. Location : On Site / Remote
- 7. Expected Installation Date and Time :

Customer's Name and Signature with Seal and Date

Received by