**Onboarding Form**

vCita makes your website more engaging and more effective in generating leads for your business. It also makes it more useful for existing clients, by encouraging them to contact or schedule an appointment directly from your website. To get a sense of how vCita works on a website, visit <http://www.demo.vcita.com>.

To help you get started and add vCita to your website, please answer the questions below so we can help you get the most out of vCita

You can always change any setting we will set as part of onboarding

**Engaging new clients effectively**

1. How would you like vCita label (see demo site above) to show up on your site?

[ ]  "Need help?"

[ ]  "Let’s talk"

[ ]  "Free Intro call "

[ ]  Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Would you like to show your business logo or your personal photo?

[ ]  My business logo

[ ]  My personal photo

1. Would you prefer to introduce yourself with your

[ ]  My business name

[ ]  My full name

[ ]  Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. What is your professional title (can be left empty): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. What is the email address you would like get contact requests/appointments to: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Would you like to receive a mobile text notifications also (SMS) ? [ ] Yes [ ]  No
Phone number: \_\_\_\_\_\_\_\_\_\_

**Business calendar and offered services**

1. What are your business hours? E.g Monday-Friday 9am-5pm \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_
2. Do you have an existing calendar you'd like to use to retrieve your up-to-date availability? [ ]  YES [ ] NO.
What provider/software do you use (e.g. Gmail, Outlook): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. Please list the services you would to offer your clients?

Example: you can offer a **intro call** via **Phone** for **Free** with **15 minutes** duration

or **Clinic appointment** at **your location** for **$100** with **30 minutes** duration

|  |  |  |  |
| --- | --- | --- | --- |
| Service name  | Via  | Price | Duration |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_ |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_ |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_ |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_ |

* **Via** can be “Phone”, “Skype”, “Your Location”, “Client location”
* **Price** can be an amount in any currency, “Free” or “show nothing”

Contact details – Please include any relevant contact details for the appointment (Address, Phone number, Skype etc): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. vCita lets you collect payments as part of scheduling process and uses paypal for payments processing
Would you like to collect payments for your services [ ] Yes [ ] No

What is your paypal account: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What currency would you like to use: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Would you like our scheduling system to automatically accept appointment requests for times at which you're available? [ ]  YES [ ] NO

**Website integration:**

1. Would you like us to directly work with your website builder in order to add vCita to your website? [ ] Yes [ ]  No

 What are your website builder contact details?

Name: \_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_

Phone number: \_\_\_\_\_\_\_\_\_\_

Other comments or notes:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_