

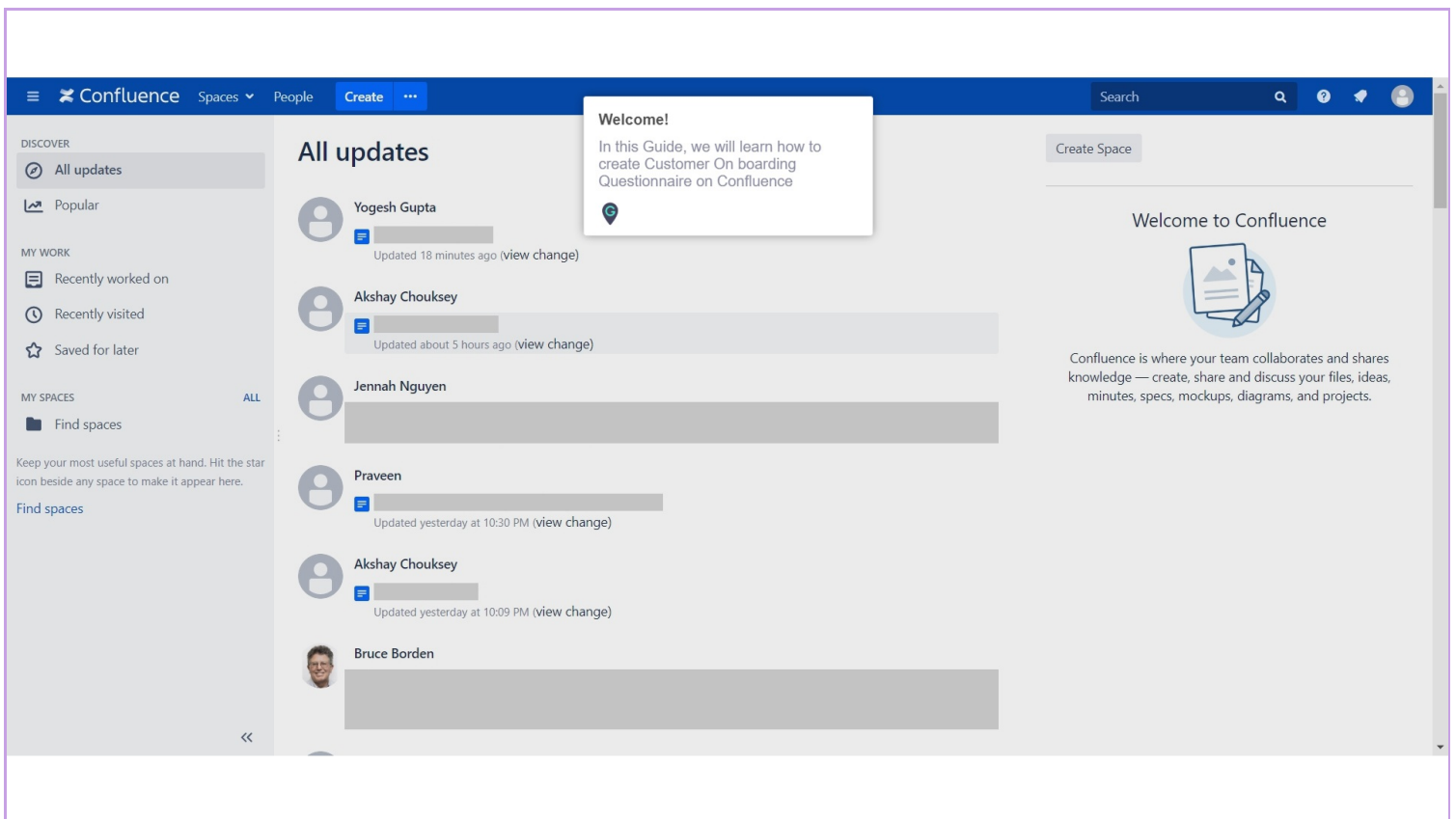


How to create Customer On boarding
Questionnaire on Confluence

Step: 01

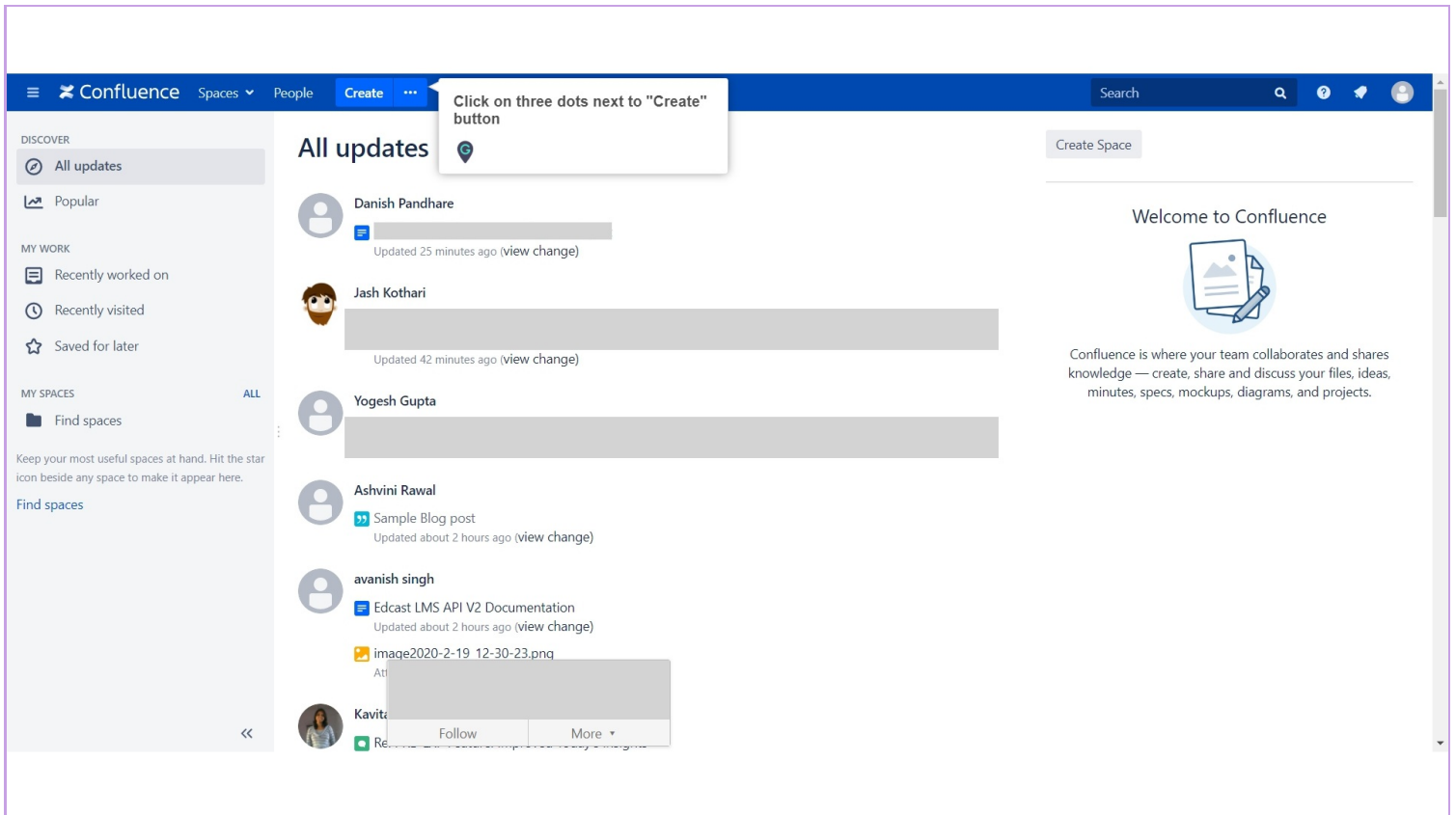
Welcome!

In this Guide, we will learn how to create Customer On boarding Questionnaire on Confluence



Step: 02

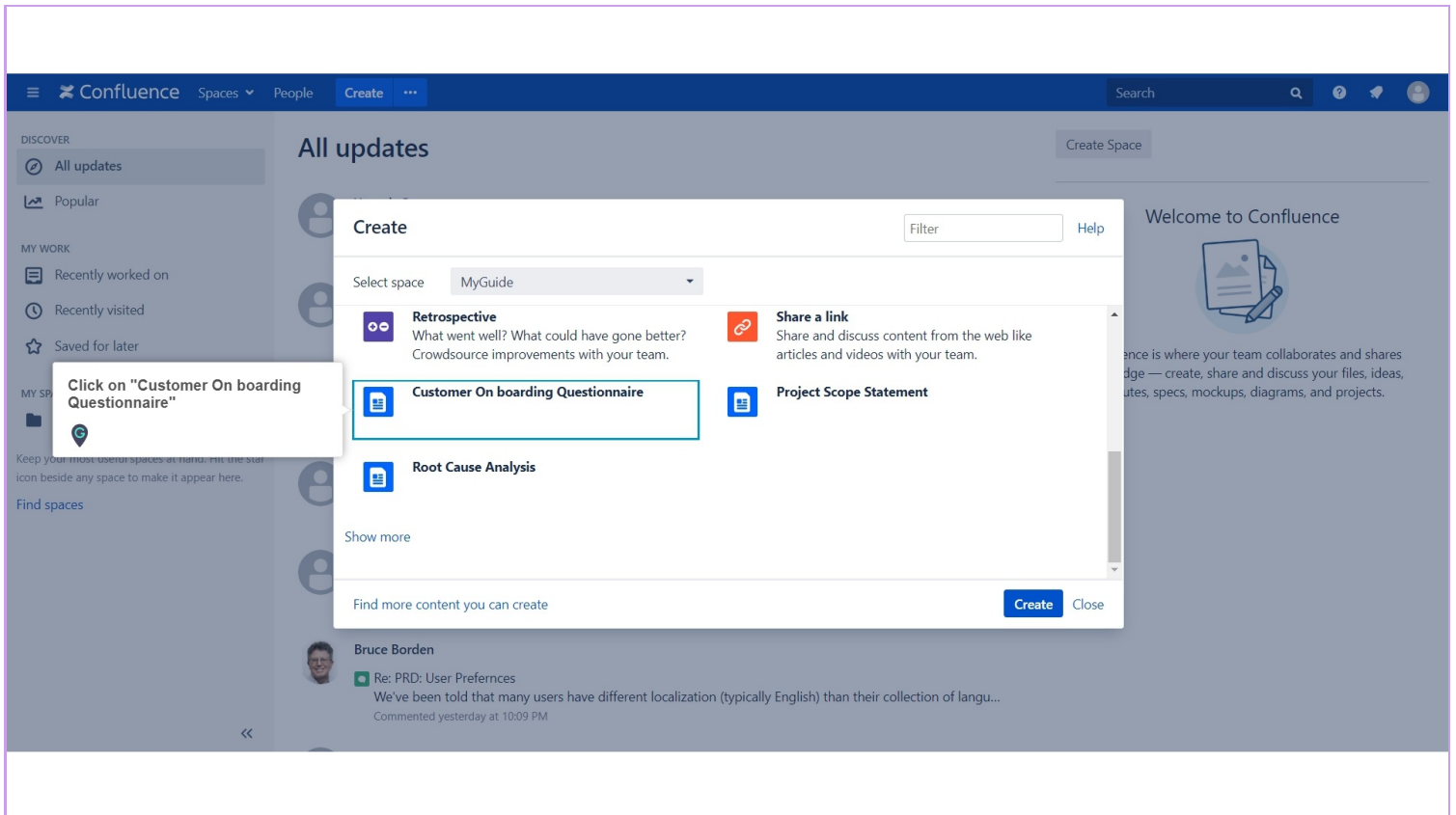
Click on three dots next to "Create" button



The screenshot shows the Confluence interface. At the top, there is a navigation bar with 'Confluence', 'Spaces', 'People', and 'Create' buttons. A callout box with a white background and a blue border points to the three dots next to the 'Create' button, containing the text 'Click on three dots next to "Create" button'. Below the navigation bar, the main content area is titled 'All updates' and lists several updates from users: Danish Pandhare (updated 25 minutes ago), Jash Kothari (updated 42 minutes ago), Yogesh Gupta, Ashvini Rawal (Sample Blog post, updated about 2 hours ago), avanish singh (Edcast LMS API V2 Documentation, updated about 2 hours ago), and Kavita. On the right side, there is a 'Create Space' button and a 'Welcome to Confluence' message with an icon of a document and a pencil. The left sidebar contains navigation options like 'All updates', 'Popular', 'Recently worked on', 'Recently visited', 'Saved for later', and 'Find spaces'.

Step: 03

Click on "Customer On boarding Questionnaire"



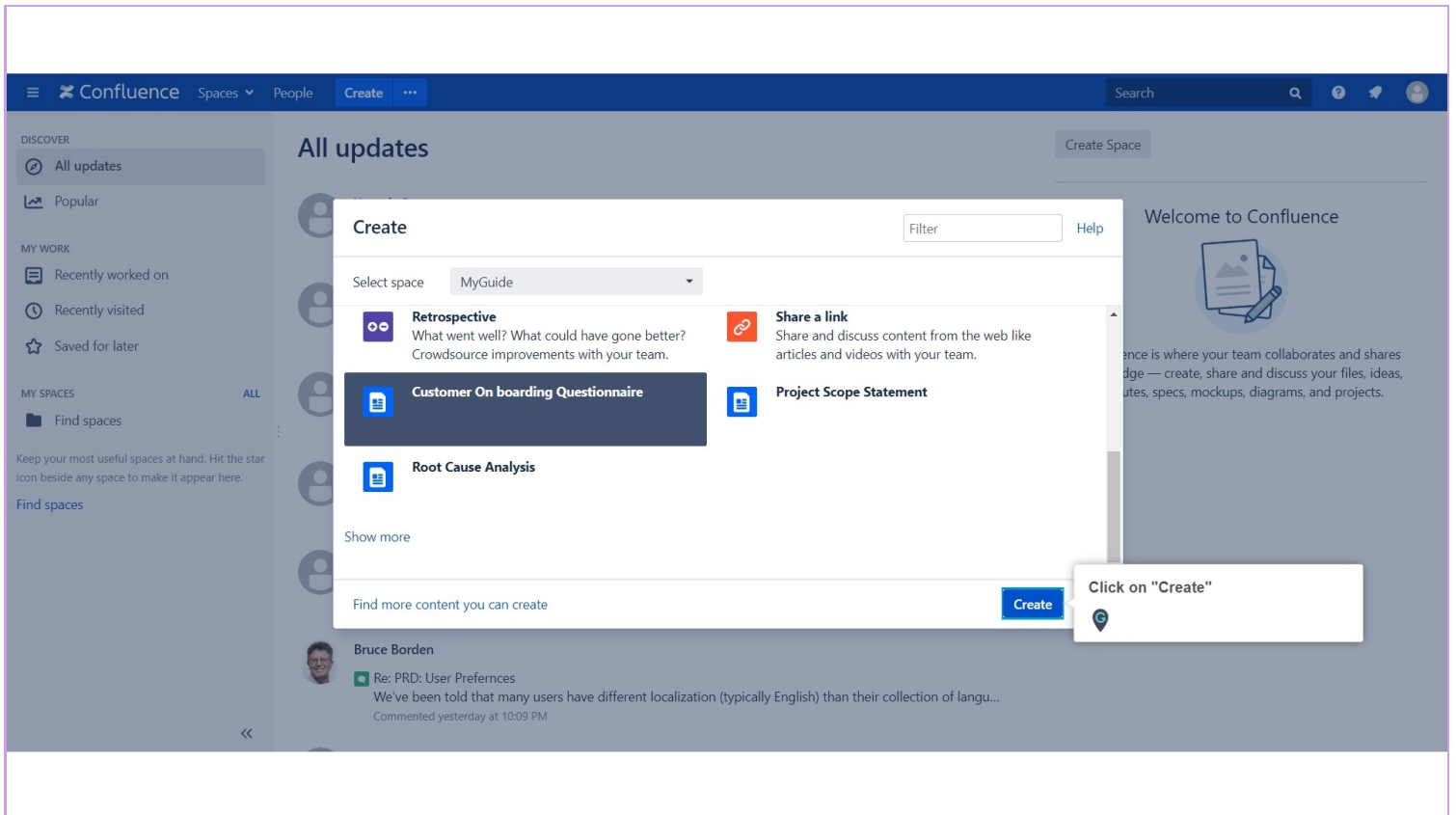
The screenshot shows the Confluence interface with the 'Create' dialog box open. The dialog is titled 'Create' and is set to the 'MyGuide' space. It lists several content types for creation:

- Retrospective**: What went well? What could have gone better? Crowdfsource improvements with your team.
- Share a link**: Share and discuss content from the web like articles and videos with your team.
- Customer On boarding Questionnaire**: This option is highlighted with a red box.
- Project Scope Statement**
- Root Cause Analysis**

A tooltip is visible over the 'Customer On boarding Questionnaire' option, containing the text: "Click on "Customer On boarding Questionnaire"". The background shows the 'All updates' feed with a post from Bruce Borden.

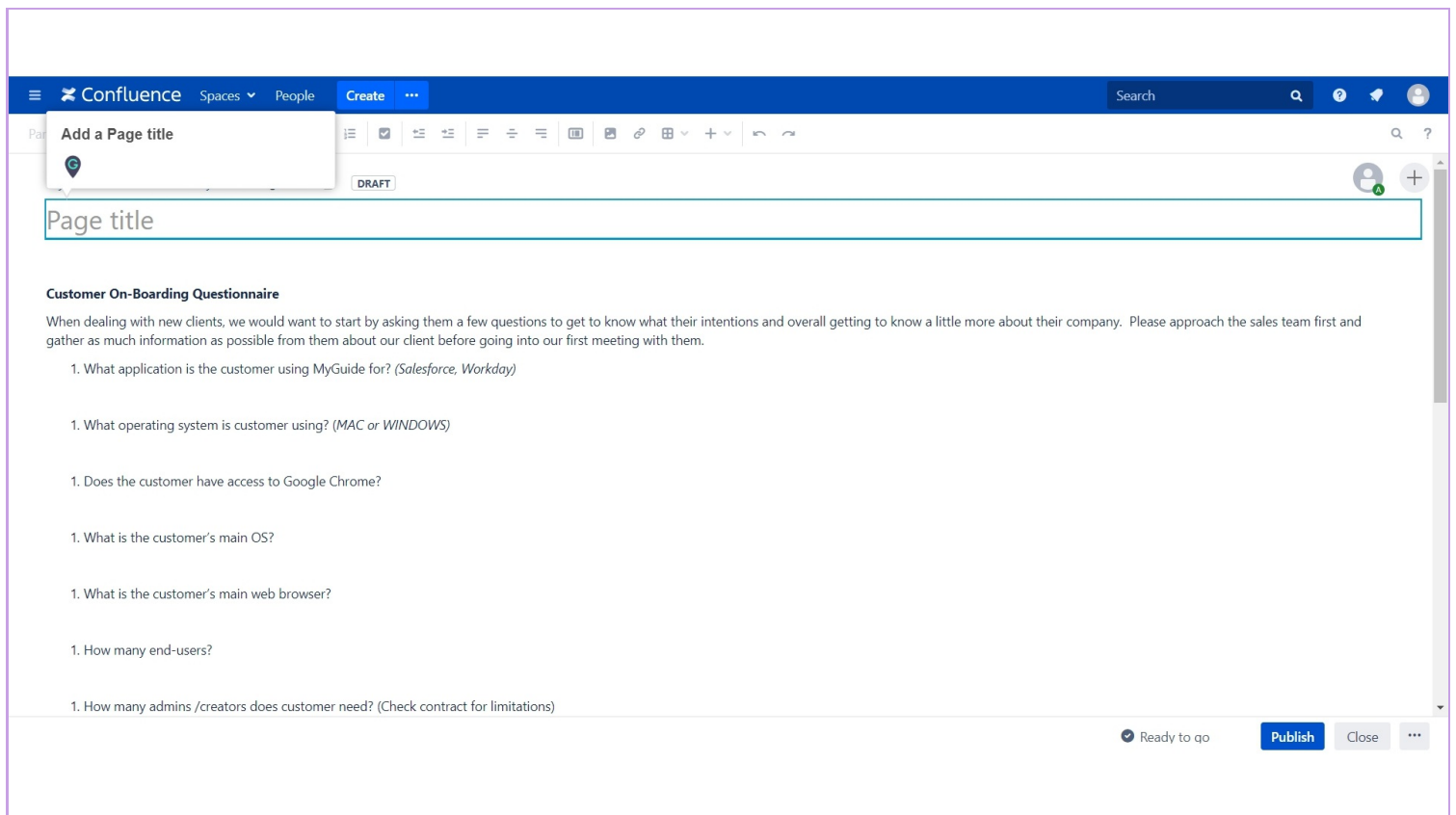
Step: 04

Click on "Create"



Step: 05

Add a Page title



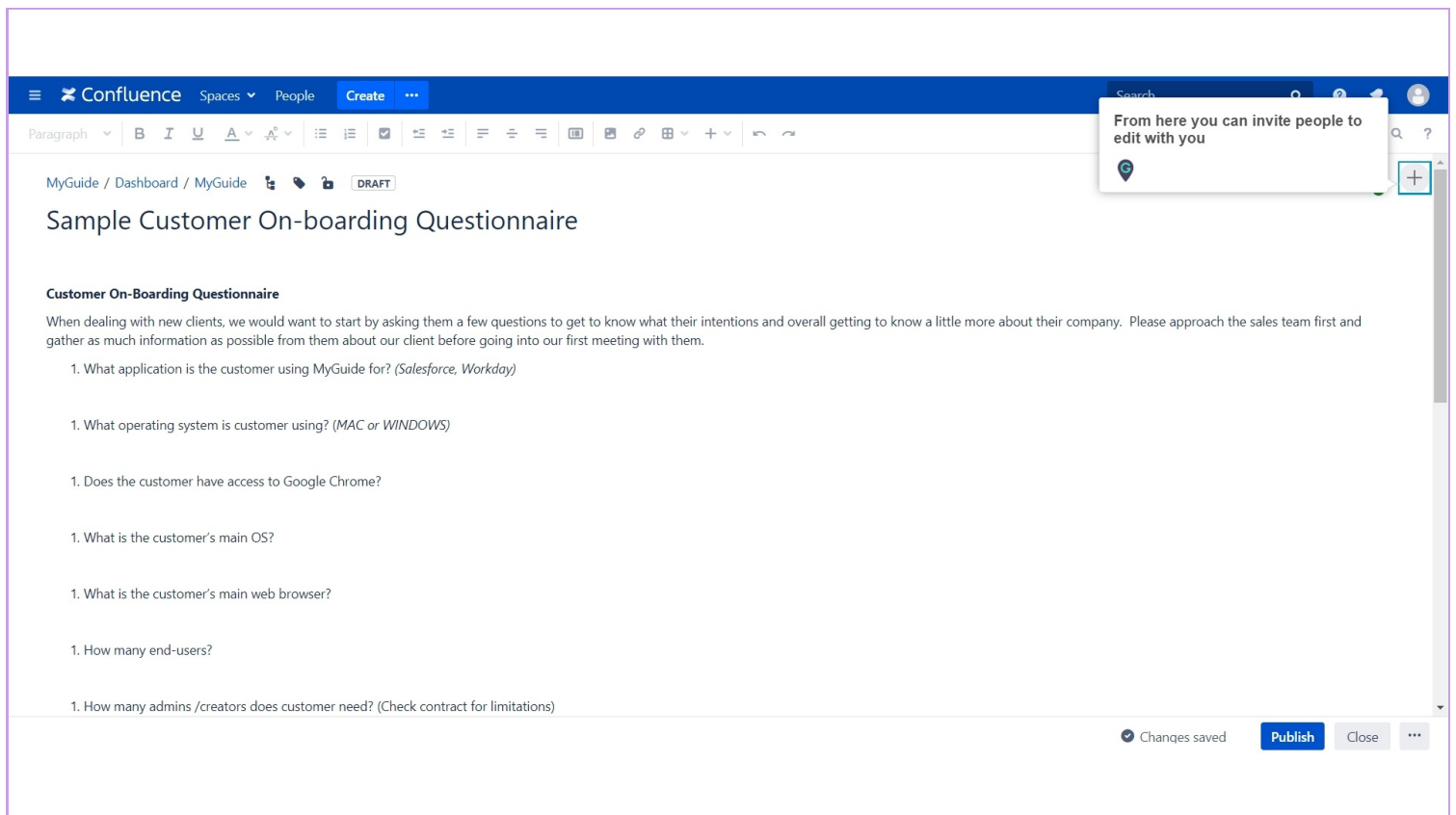
The screenshot shows the Confluence 'Create' page editor. At the top, there is a navigation bar with 'Confluence', 'Spaces', 'People', and 'Create' buttons. A search bar is on the right. Below the navigation bar, a dropdown menu titled 'Add a Page title' is open, showing a search icon and a 'DRAFT' button. The main content area contains a text input field with the placeholder 'Page title'. Below this, there is a section titled 'Customer On-Boarding Questionnaire' with the following text: 'When dealing with new clients, we would want to start by asking them a few questions to get to know what their intentions and overall getting to know a little more about their company. Please approach the sales team first and gather as much information as possible from them about our client before going into our first meeting with them.'

1. What application is the customer using MyGuide for? (*Salesforce, Workday*)
1. What operating system is customer using? (*MAC or WINDOWS*)
1. Does the customer have access to Google Chrome?
1. What is the customer's main OS?
1. What is the customer's main web browser?
1. How many end-users?
1. How many admins /creators does customer need? (Check contract for limitations)

At the bottom right, there is a status bar with a 'Ready to go' indicator, a 'Publish' button, a 'Close' button, and a menu icon.

Step: 06

From here you can invite people to edit with you



The screenshot shows the Confluence editor interface. At the top, there is a navigation bar with 'Confluence', 'Spaces', 'People', and 'Create' buttons. Below this is a rich text editor toolbar. The main content area displays a draft document titled 'Sample Customer On-boarding Questionnaire'. The document content includes a sub-header 'Customer On-boarding Questionnaire', an introductory paragraph, and a list of seven questions. At the bottom right of the editor, there is a status bar with 'Changes saved', a 'Publish' button, and 'Close' and '...' options. A tooltip on the right side of the editor reads 'From here you can invite people to edit with you' and points to a plus icon in the top right corner of the editor area.

MyGuide / Dashboard / MyGuide **DRAFT**

Sample Customer On-boarding Questionnaire

Customer On-boarding Questionnaire

When dealing with new clients, we would want to start by asking them a few questions to get to know what their intentions and overall getting to know a little more about their company. Please approach the sales team first and gather as much information as possible from them about our client before going into our first meeting with them.

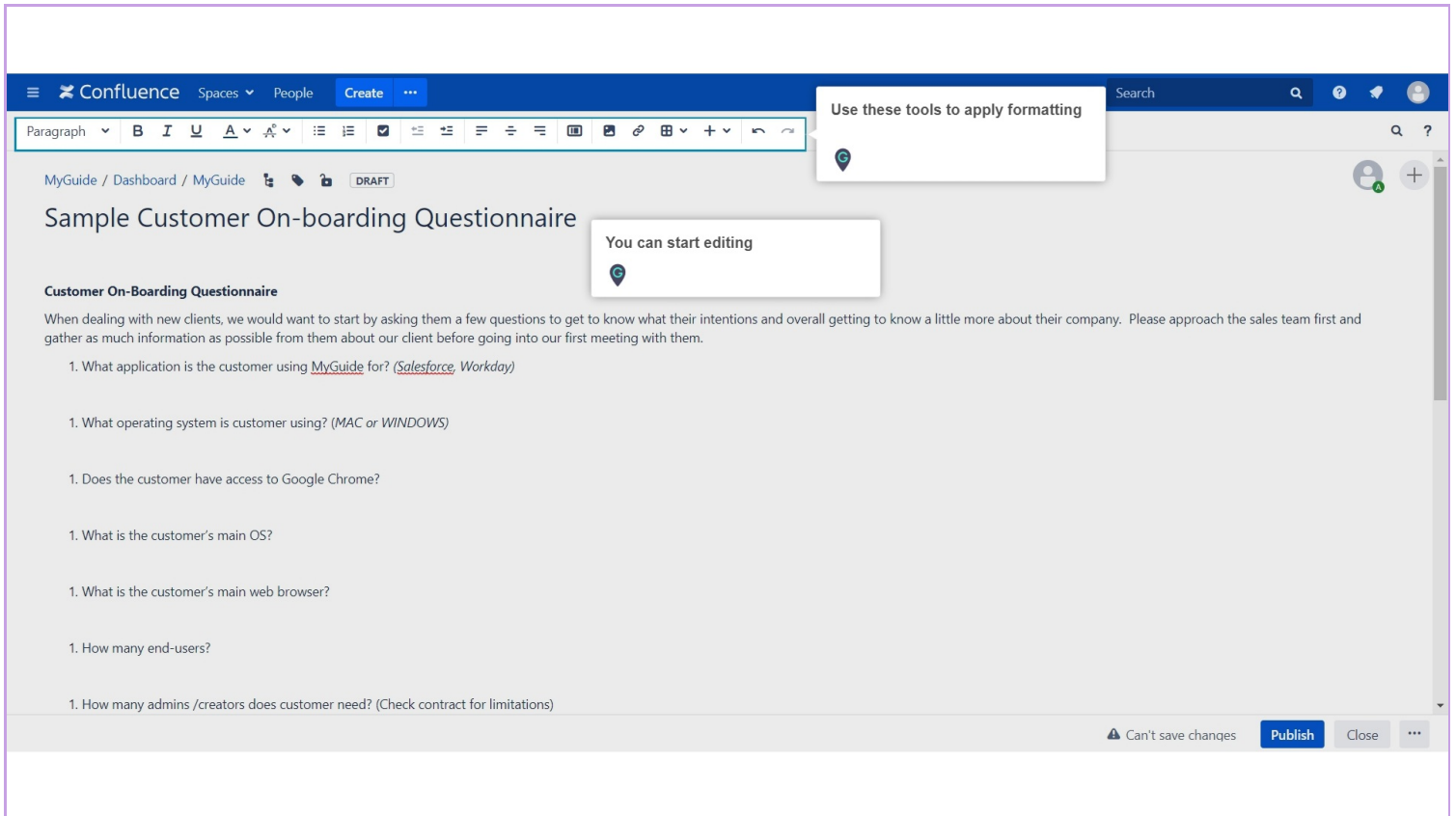
1. What application is the customer using MyGuide for? (*Salesforce, Workday*)
1. What operating system is customer using? (*MAC or WINDOWS*)
1. Does the customer have access to Google Chrome?
1. What is the customer's main OS?
1. What is the customer's main web browser?
1. How many end-users?
1. How many admins /creators does customer need? (Check contract for limitations)

Changes saved **Publish** Close ...

Step: 07

You can start editing

Use these tools to apply formatting



The screenshot shows the Confluence editor interface for a page titled "Sample Customer On-boarding Questionnaire". The page is in "DRAFT" mode. The top navigation bar includes "Confluence", "Spaces", "People", and "Create". A rich text editor toolbar is visible with options for Paragraph, Bold (B), Italic (I), Underline (U), Text color (A), Background color, Bulleted list, Numbered list, Indent, Outdent, Table, Link, Unlink, and more. The main content area contains the following text:

Customer On-Boarding Questionnaire

When dealing with new clients, we would want to start by asking them a few questions to get to know what their intentions and overall getting to know a little more about their company. Please approach the sales team first and gather as much information as possible from them about our client before going into our first meeting with them.

1. What application is the customer using MyGuide for? (*Salesforce, Workday*)
1. What operating system is customer using? (*MAC or WINDOWS*)
1. Does the customer have access to Google Chrome?
1. What is the customer's main OS?
1. What is the customer's main web browser?
1. How many end-users?
1. How many admins /creators does customer need? (Check contract for limitations)

At the bottom right, there is a status bar with a warning icon and the text "Can't save changes", a "Publish" button, and "Close" and "..." options. Two callout boxes are present: one pointing to the toolbar with the text "Use these tools to apply formatting" and another pointing to the main text area with the text "You can start editing".

Step: 08

Click on "Publish" once you're done!

The screenshot shows the Confluence editor interface. At the top, there's a navigation bar with 'Confluence', 'Spaces', 'People', and 'Create'. Below that is a rich text editor toolbar. The page content is a draft document titled 'Sample Customer On-boarding Questionnaire'. The text reads: 'Customer On-boarding Questionnaire. When dealing with new clients, we would want to start by asking them a few questions to get to know what their intentions and overall getting to know a little more about their company. Please approach the sales team first and gather as much information as possible from them about our client before going into our first meeting with them.' Below this is a list of seven questions, each preceded by '1.':

1. What application is the customer using MyGuide for? (*Salesforce, Workday*)
1. What operating system is customer using? (*MAC or WINDOWS*)
1. Does the customer have access to Google Chrome?
1. What is the customer's main OS?
1. What is the customer's main web browser?
1. How many end-users?
1. How many admins /creators does customer need? (Check contract for limitations)

At the bottom right, there is a callout box with the text 'Click on "Publish" once you're done!' and a blue 'Publish' button, a 'Close' button, and a three-dot menu icon.

Thank You!

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