Klarstig

Field Service Financial Services Onboarding Quiz

Use this short knowledge check to discuss sound working practices. Choose one answer for each scenario and explain how you would apply the guidance in your role.

Contact and reference

Organization using this document

Your name or contact reference *

Email for a reply if needed

Information for this document

Learner name or reference *

When instructions are unclear what should you do first *

- ☐ Assume the usual approach is acceptable
- ☐ Skip the task without telling anyone
- ☐ Ask the responsible person for clarification

What is the best way to document a completed task *

- ☐ Rely only on memory
- ☐ Record the result date and relevant evidence
- ☐ Mark complete before checking the result

A new colleague asks to use your account while waiting for access what should you do *

- ☐ Direct them to the approved access process
- ☐ Share your password temporarily
- ☐ Leave your account signed in for them

How should you confirm that onboarding is complete *

- ☐ Assume the first day means everything is complete
- ☐ Skip any task that takes too long
- ☐ Check required tasks access and the agreed handover with the responsible person

How will you apply these principles to your work *

Specific details

Role or service being introduced

Complete when relevant to this request.

Information access and support needed to begin

Operating context

Service area and case reference

Complete when relevant to this request.

Authorized reviewer supporting information and handling restrictions

Team specific details

Service territory visit or assigned technician

Complete when relevant to this request.

Site access appointment window parts and completion handover

Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

Klarstig / Daniel Petry · klarstig.ai · hello@klarstig.ai · support@klarstig.ai · 800-781-1775 · 11917 Laurel Ave., Forestville, CA 95436, USA