Klarstig

# Finance Construction Customer Referral

Introduce a person or organization to an appropriate service or contact. Explain the reason for the introduction and confirm permission to share the details.

## Contact and reference

**Organization using this document**

**Your name or contact reference ***

**Email for a reply if needed**

## Information for this document

**Person or organization being referred ***

**Receiving service or contact ***

**Reason for referral ***

**Relevant needs and expected support ***

**Permission to share the stated information ***

- ☐ Permission confirmed
- ☐ Permission still needed
- ☐ No personal details are being shared

**Permitted contact details for the referred party**

### Timing or availability constraints

## Specific details

### Customer relationship or transaction reference

Complete when relevant to this request.

### Product service or interaction that explains this request

## Operating context

### Project site and work phase

Complete when relevant to this request.

### Site access coordination dependencies and working hours

## Team specific details

### Cost center ledger or finance reference

Complete when relevant to this request.

### Budget allocation authorization reconciliation and supporting evidence

## 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.**

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