Klarstig

# Procurement Automotive Client Intake

**FICTIONAL EXAMPLE FOR ILLUSTRATION. NAMES, ADDRESSES AND NUMBERS ARE INVENTED.**

Gather the information needed to start a new relationship or case. Focus on the person's goals, practical needs and the next step.

## Contact and reference

**Organization using this document**

Maple Street Community Center

**Your name or contact reference ***

Alex Rivera

**Email for a reply if needed**

alex.rivera@example.com

## Information for this document

**Reason for contacting or joining the organization ***

I helped at my school food drive last spring and enjoyed it. I would like to give a few hours each week and get to know my neighbours.

**Main goals or needs ***

Reach more local families this year and support a youth reading program with visible community results.

**Relevant background**

(Free-text answer - not filled in for this example)

**Desired timing**

(Short answer - not filled in for this example)

**Practical constraints or access needs**

(Free-text answer - not filled in for this example)

**Previous contact or existing reference**

REF-2026-0148

**Preferred next step**

Meeting

## Specific details

**Client organization or project reference**

Complete when relevant to this request.

Maple Street Community Center

### Services needed and the outcome the client expects

Reach more local families this year and support a youth reading program with visible community results.

## Operating context

### Workshop dealership or vehicle reference

Complete when relevant to this request.

REF-2026-0152

### Vehicle availability access accessories and service constraints

(Free-text answer - not filled in for this example)

## Team specific details

### Sourcing request supplier or purchasing owner

Complete when relevant to this request.

Operations

### Specifications alternatives approval limits and delivery requirements

(Free-text answer - not filled in for this example)

## 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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