Klarstig

Sales Professional Services Purchase Request

Describe the service or action you need and the information required to assess and route the request. State the impact and timing clearly.

Contact and reference

Organization using this document

Your name or contact reference *

Email for a reply if needed

Information for this document

What are you requesting *

Reason and expected result *

Date needed

Operational priority *

- ☐ Routine
- ☐ Time sensitive
- ☐ Work is blocked

Who or what is affected *

Location system or project reference

Actions already attempted

Specific details

Items supplier and purchase purpose

Complete when relevant to this request.

Specifications alternatives budget allocation and required delivery

Operating context

Client engagement and service area

Complete when relevant to this request.

Deliverables review contacts timing and confidentiality instructions

Team specific details

Account opportunity or sales owner

Complete when relevant to this request.

Customer needs buying stage commitments and next agreed contact

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