New Client Setup Sheet

Two minutes. Fill in and email to casey@cavorasystems.com — or do it online at **cavorasystems.com/onboard**. The line is live within a business day (US: once carrier registration clears).

THE BUSINESS

Business name _____ **Owner's name** _____

Owner's cell _____ (alerts go here) **Business phone** _____ (the one customers call)

Email _____ **Phone carrier** ☐ Freedom ☐ Telus/Koodo ☐ Rogers/Fido ☐ Bell/Virgin ☐ Landline ☐ Other: _____

Country ☐ Canada ☐ United States **Website** _____

WHAT THEY'RE GETTING

Package ☐ Missed-Call Text-Back ☐ Capture Bundle (+ review requests) ☐ Reception (24/7 front desk)

Signed up by ☐ Casey ☐ Brandon ☐ Partner: _____ **Google review link** _____ (optional)

Hours _____ **Main services** _____

US BUSINESSES ONLY — CARRIER TEXTING REGISTRATION

US carriers require every business that sends texts to be registered (A2P 10DLC). We file it and pay for it; we just need what they ask for. Canadian businesses skip this section.

Legal business name _____ **Tax ID (EIN)** _____

Business address _____

WHERE LEADS COME FROM (SO WE CAN CATCH THEM)

Website form? ☐ Yes — URL: _____ ☐ No (we'll host one) **Lead services** ☐ Angi ☐ HomeAdvisor ☐ Thumbtack ☐ Other: _____

Email those leads land in _____ (we'll send the 2-minute forwarding steps)

What happens next: we provision a local number in the business's name, test it, and text the owner the forwarding steps for their phone (three short dial codes, about 20 seconds). From then on every missed call, voicemail and lead reaches the owner's cell, and a one-page report arrives monthly. Setup and support are by email and text.