SAMPLE INTAKE & PREFERENCES FORM

FORM A-017

PDF conversion test | Blank sample | No real information required

01 BASIC DETAILS

Full name _____ **Preferred name** _____

Street address _____ **Apartment / Unit** _____

City _____ **State / Province** _____ **Postal code** _____

Phone number _____ **Email address** _____

02 SELECTIONS & PREFERENCES

Preferred contact method (circle one):

Email Phone Text message Postal mail

Priority level (check one):

☐ Low ☐ Standard ☐ Urgent

Availability (check all that apply):

☐ Weekdays ☐ Weekends ☐ Mornings ☐ Afternoons ☐ Evenings

How did you hear about us? (circle one):

Website Friend Social media Event Other: _____

03 DATES, NUMBERS & SHORT ANSWERS

Requested date (MM / DD / YYYY) _____ **Reference ID / Code** _____ **Quantity (0-99)** _____

Estimated budget (check one):

☐ Under $100 ☐ $100-$499 ☐ $500-$999 ☐ $1,000+

One-word description _____ **Website / URL (optional)** _____

04 RATING MATRIX

Rate each item by checking one box per row (1 = low, 5 = high).

	1	2	3	4	5
Clarity	☐	☐	☐	☐	☐
Convenience	☐	☐	☐	☐	☐
Overall interest	☐	☐	☐	☐	☐

05 NOTES & CONFIRMATION

Additional comments / special instructions:

_____

_____

Signature: _____ **Date:** _____