EASYAML USER GUIDE

Adding Custom Questionnaires to Send to Clients

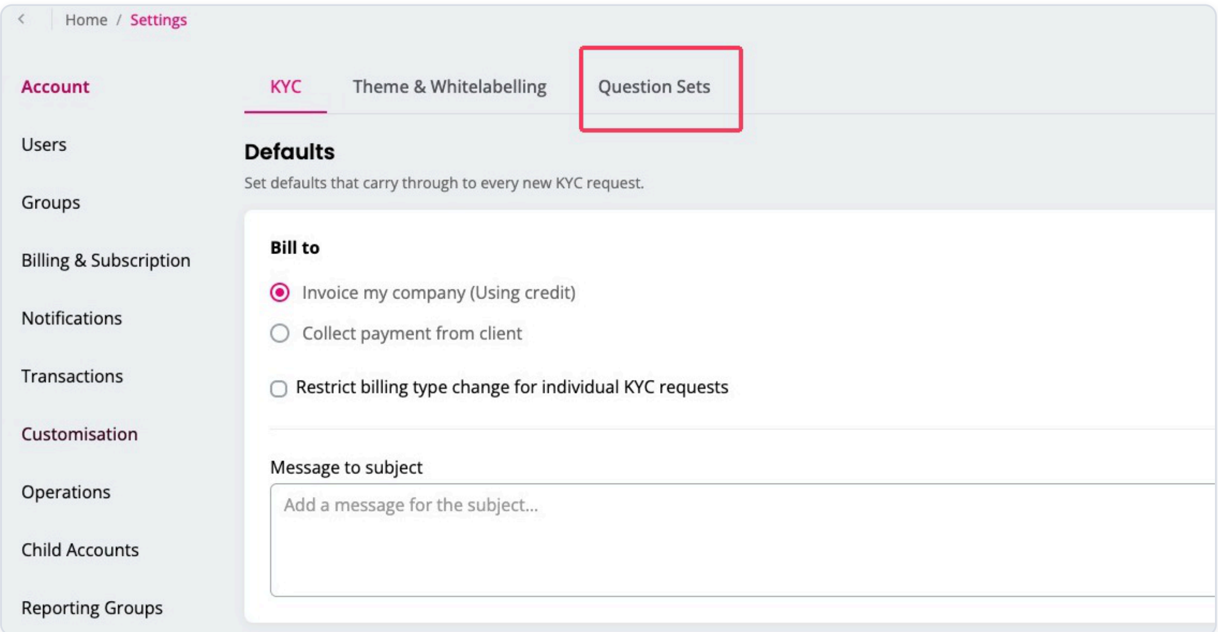
KYC-08 · Version 1.1

Custom question sets let you collect broader onboarding information from clients — beyond identity and financial evidence — as part of their verification. Build the set once, then attach it to any KYC request.

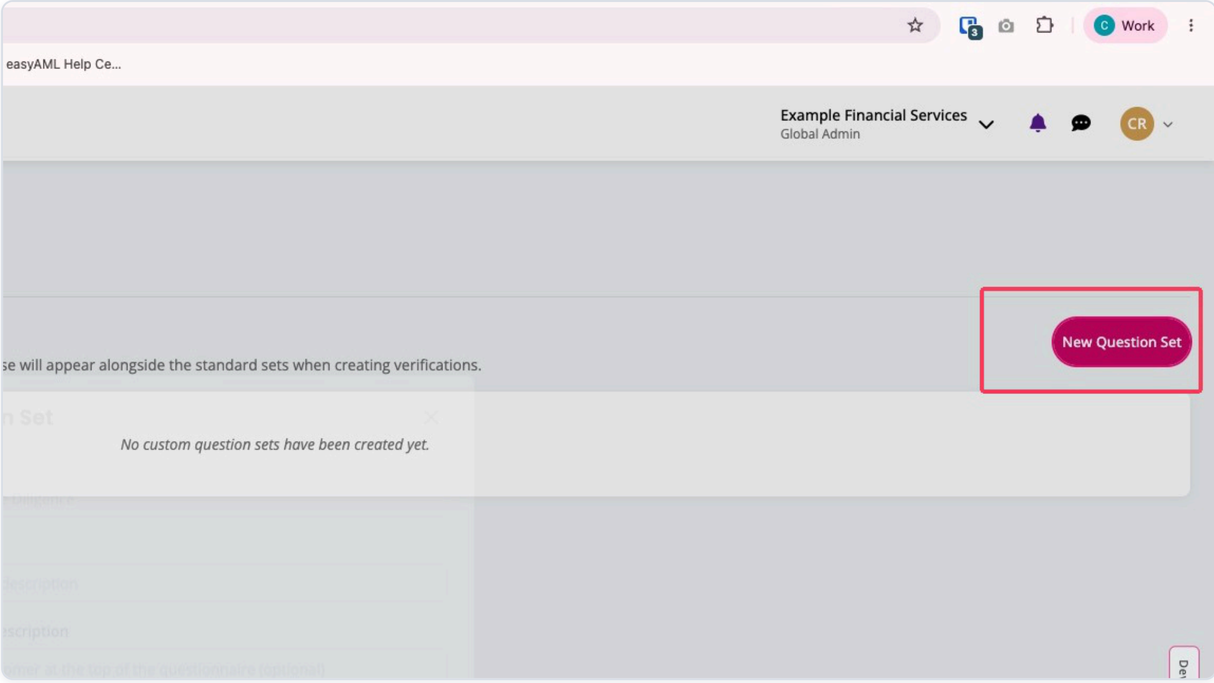
OPEN TO START `https://app.easyaml.com/settings/account`

Create a question set

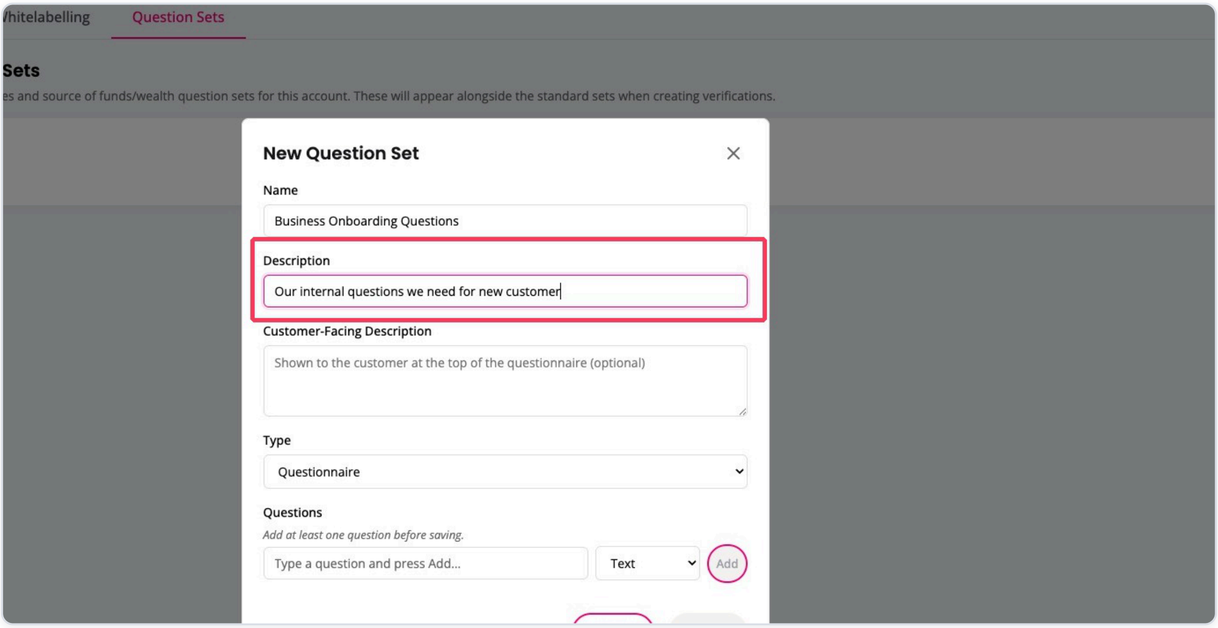
1 Go to **Account Settings → Customisation**, then select the **Question Sets** tab.



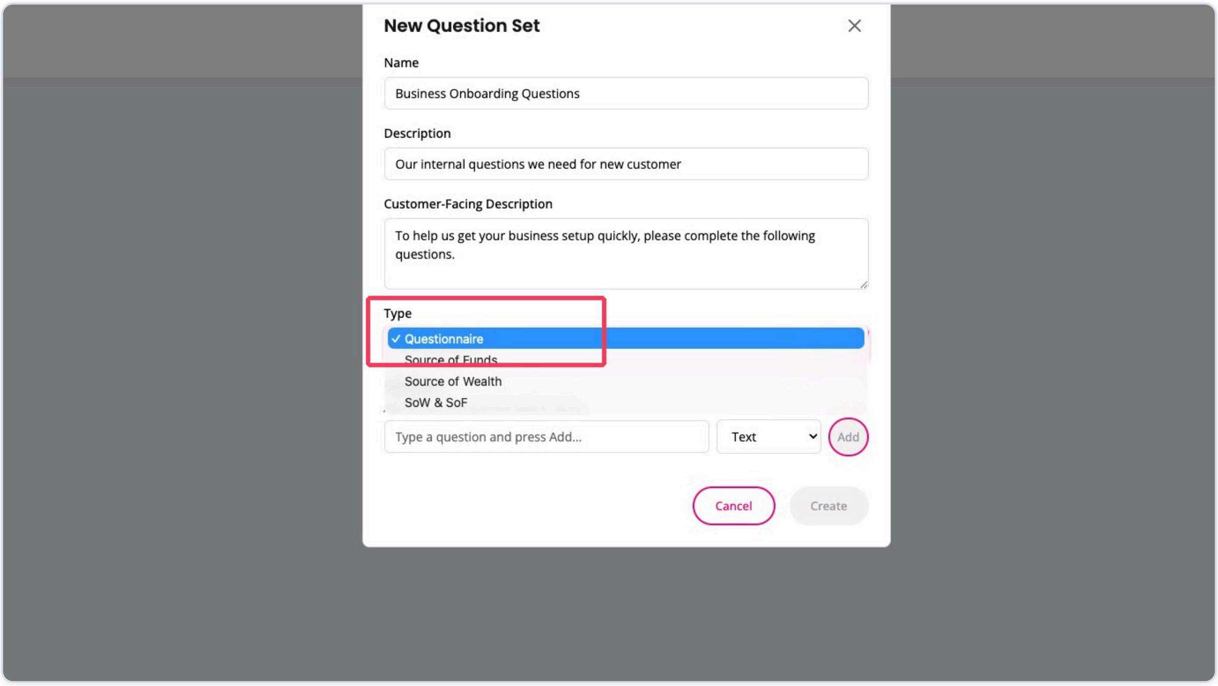
2 Click **New Question Set**.



3 Name the set (e.g. *"Business Onboarding Questions"*), then complete both descriptions — the **Description** is internal, seen only by your team; the **Customer-Facing Description** is what clients read, so make it clear and helpful.

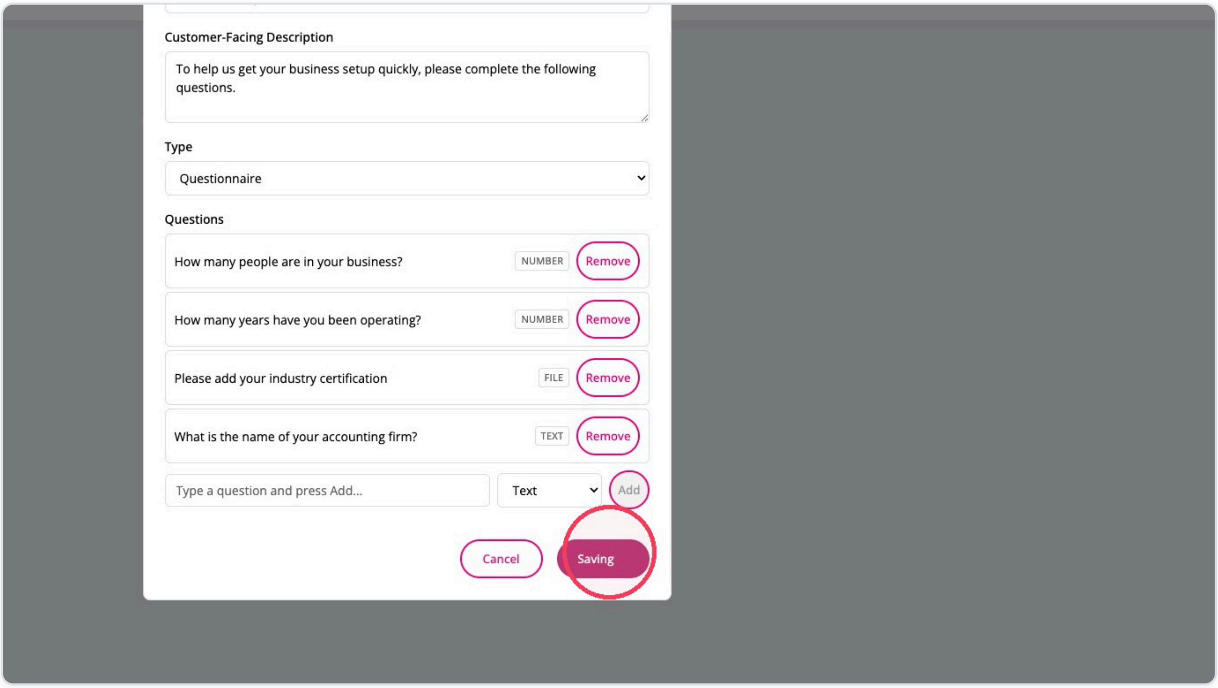


4 Choose the **Type** — generally **Questionnaire**.



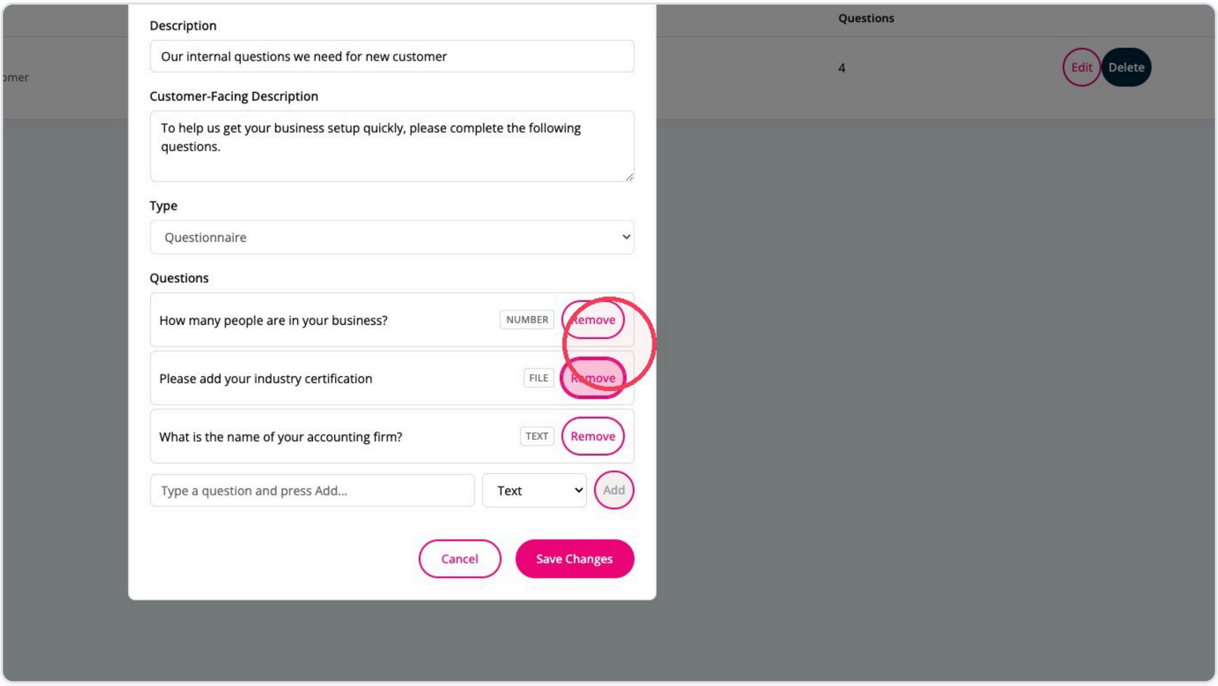
5 Add your questions. Question formats include **numeric** (“How many people are in your business?”), **text** (“What is the name of your accounting firm?”), and **file upload** (“Please add your industry certification”). Mark questions required or optional as needed.

6 Click **Create**. The set is now available to attach when sending a KYC or from an individual's Questionnaire tab.

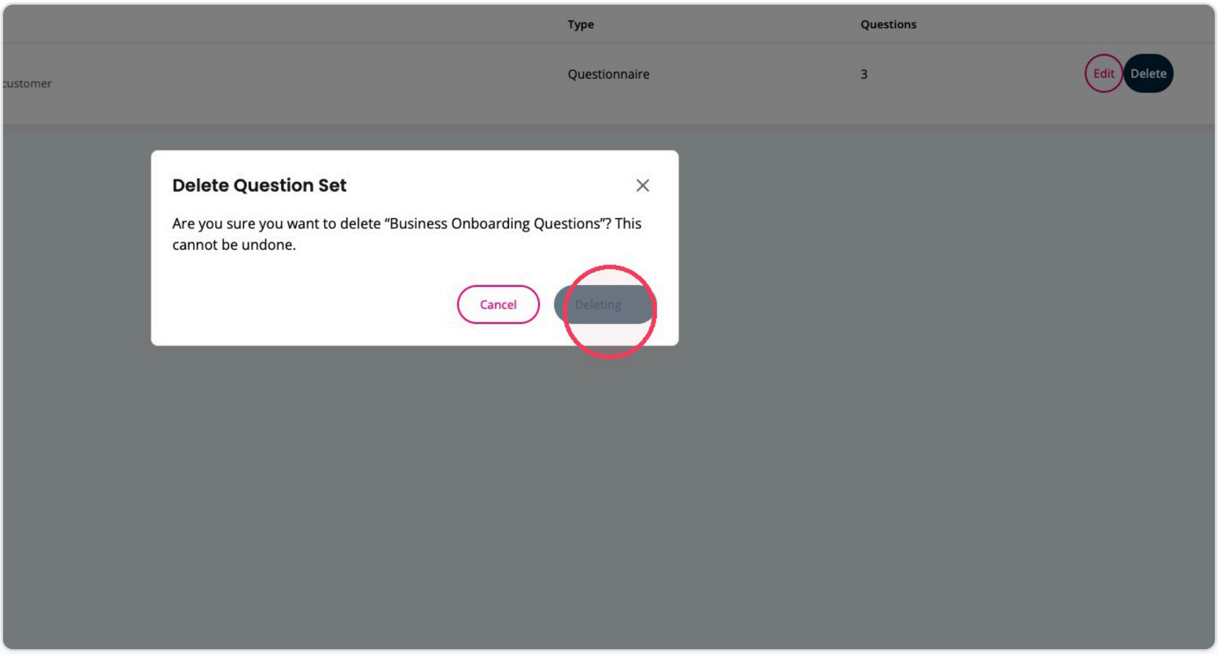


Edit or delete a set

1 Click **Edit** on the question set to add or remove questions, then **Save Changes**.



2 To remove a set entirely, click **Delete** and confirm.



Questionnaires are separate from Source of Funds / Wealth: SoF/SoW collects financial evidence, questionnaires collect broader onboarding information. Sending them is covered in Adding Individuals (KYC-07) and Reviewing a KYC Record (KYC-09).

More ways to get help

- **In-platform:** the "Want Help?" button on each page opens the relevant walkthrough.
- **Knowledge Base:** https://knowledge.easyaml.com/how-to-add-custom-questionnaires-to-send-to-clients
- **Video walkthrough:** https://scribehow.com/o/PKpOki2kThyzGwDRLEXASw/viewer/How_to_Add_Custom_Questionnaires_to_Send_to_Clients__64e28810