

Adding Custom Questionnaires to Send to Clients

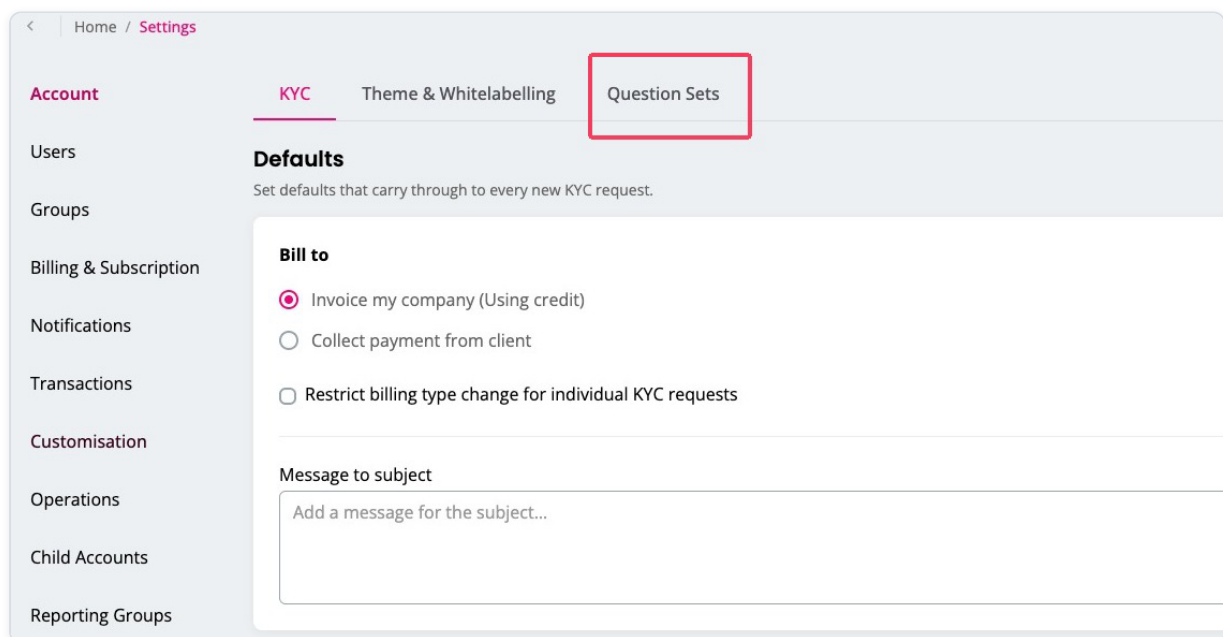
KYC-08 · Version 1.1

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.

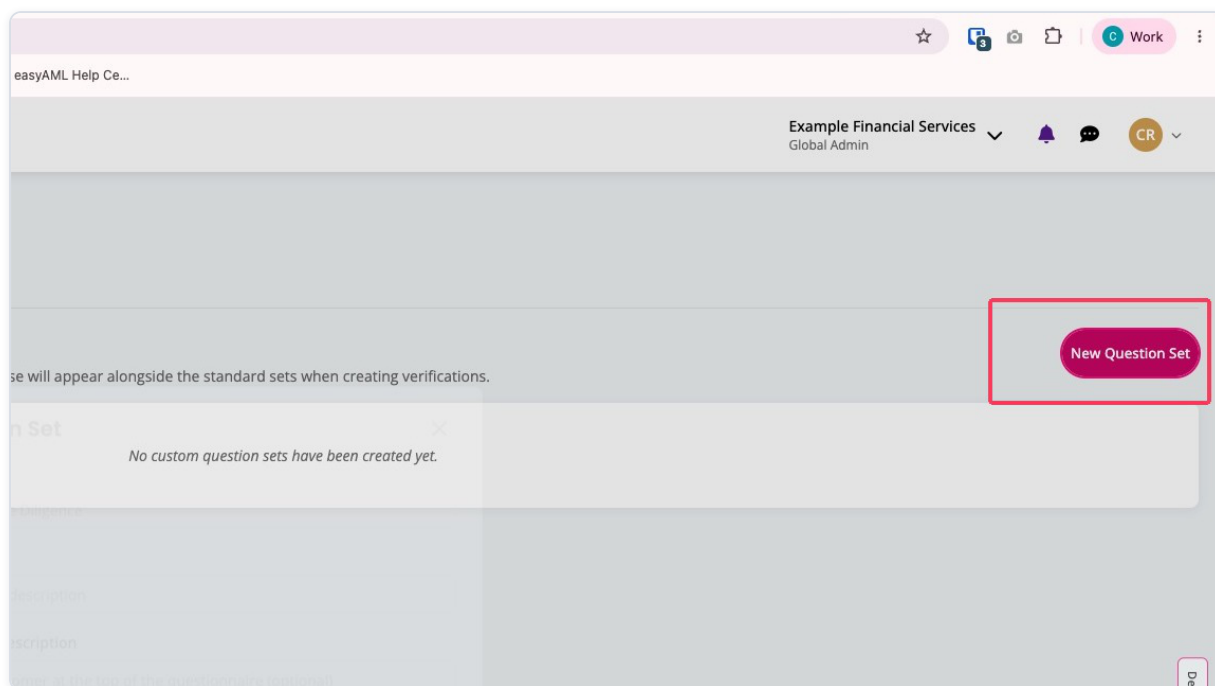
OPEN TO START <https://app.easyaml.com/settings/account>

Create a question set

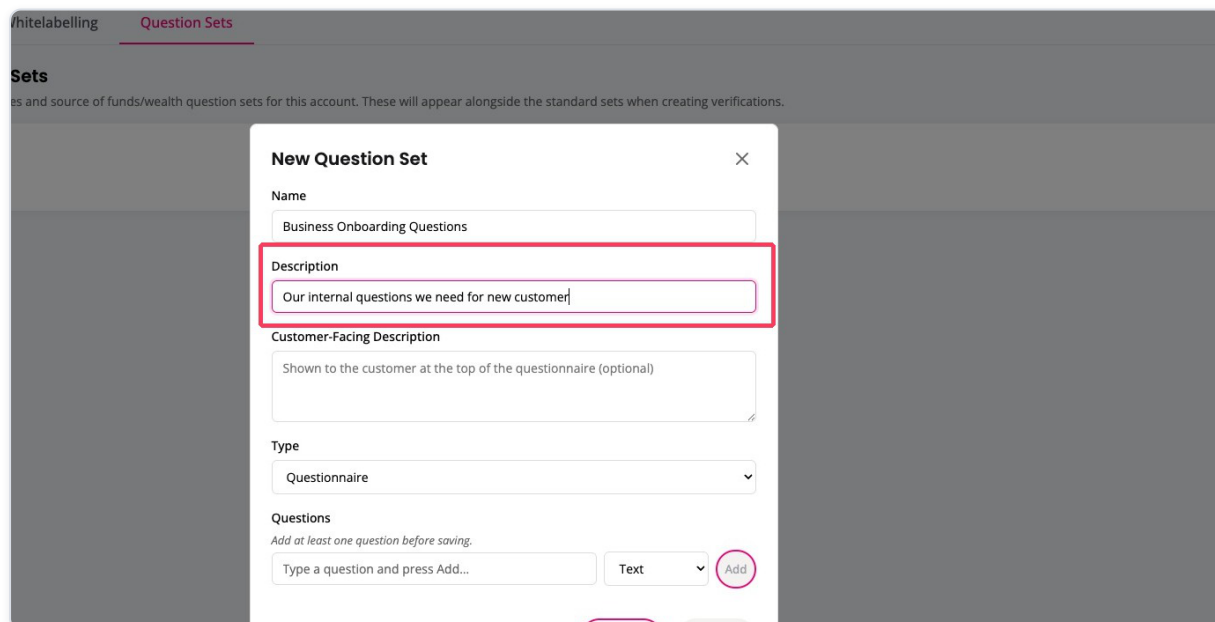
- 1 Go to **Account Settings → Customisation**, then select the **Question Sets** tab.



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**.

New Question Set

Name
Business Onboarding Questions

Description
Our internal questions we need for new customer

Customer-Facing Description
To help us get your business setup quickly, please complete the following questions.

Type
✓ Questionnaire
Source of Funds
Source of Wealth
SoW & SoF

Type a question and press Add... Text Add

Cancel Create

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.

Customer-Facing Description
To help us get your business setup quickly, please complete the following questions.

Type
Questionnaire

Questions

How many people are in your business? NUMBER Remove

How many years have you been operating? NUMBER Remove

Please add your industry certification FILE Remove

What is the name of your accounting firm? TEXT Remove

Type a question and press Add... Text Add

Cancel Saving

Edit or delete a set

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

omer

Description

Our internal questions we need for new customer

Customer-Facing Description

To help us get your business setup quickly, please complete the following questions.

Type

Questionnaire

Questions

How many people are in your business? NUMBER Remove

Please add your industry certification FILE Remove

What is the name of your accounting firm? TEXT Remove

Type a question and press Add...

Text Add

Cancel Save Changes

Questions

4 Edit Delete

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

customer

Type

Questionnaire

Questions

3 Edit Delete

Delete Question Set X

Are you sure you want to delete "Business Onboarding Questions"? This cannot be undone.

Cancel Deleting

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