Customer Forms & Job Records

Simple, consistent records help you understand what was agreed and what happened on the job.

Put it into practice

1. Enquiry record: contact method, service requested, location needed for planning, and preferred timing.

2. Scope record: inclusions, exclusions, quote, payment terms, access arrangements, and agreed changes.

3. Completion record: date, actual labor time, supplies, issues, payment status, and follow-up.

Starter example

Starter job record: Job reference [ ]; Service [ ]; Scope agreed [ ]; Date [ ]; Labor hours [ ]; Direct costs [ ]; Payment status [ ]; Next action [ ].

Your next action

Records to prepare / secure storage location / review routine

Collect only what you need. Restrict access, avoid putting keys or access codes in public notes, and check applicable privacy and retention requirements.

Continue with the practical decision guide and worksheet on the next pages.

Connect enquiry, scope, and completion records

Work through the decision

Give each job a simple reference so related notes can be found without spreading private details across multiple documents. Keep the enquiry, agreed scope, approved changes, completion record, and payment status connected. A concise record should let you understand what was promised and what happened.

Use a scope confirmation before the job. State included tasks, excluded tasks, price basis, timing, and any preparation or access arrangements. If the scope changes, record what changed and how the customer agreed. Keep only necessary information and separate sensitive access instructions from general planning notes.

A situation to learn from

Example: a customer asks for an extra room during a cleaning visit. Record the original scope, assess the additional time, and agree on the change before starting. The completion record should show the revised scope and actual time, rather than leaving the original quote as the only record.

How to respond

Choose a storage method with restricted access and a consistent naming routine. Check applicable privacy and retention requirements. Avoid entering customer identifiers into AI prompts or public marketing material. Records are operational aids; legal terms and privacy notices need appropriate review for your location.

Copyable record structure

Use this page with your own service and circumstances. Record assumptions separately from confirmed facts, and update the plan using actual work.

Enquiry: reference / service requested / preferred timing / public contact method

Agreement: scope / exclusions / quote basis / terms / acceptance recorded

Change: requested task / assessment / agreed price or scope change / date

Completion: work checked / actual time / costs / payment status / follow-up

Review before taking the next step

After five jobs, look for a missing field that repeatedly causes questions. Add only information that serves a clear purpose; longer forms are not automatically better.

- [ ] Latest scope easy to identify.
- [ ] Changes and agreement recorded.
- [ ] Private access data stored securely.
- [ ] Unnecessary personal details omitted.

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