[Your Business Name]
[phone] · [email] · [address]

New-Client Welcome & Service Details Sheet

For cleaning businesses — the written record of the agreed service, handed to the client at sign-up. An operational summary, not a contract.

Document details

Client reference no.: _____

Date prepared: _____

1 · Welcome & client details

Client full name: _____

Service address: _____

City, state, ZIP: _____

Primary phone: _____

Email: _____

Emergency / alternate contact (optional):

_____

2 · Agreed cleaning service — service type

- ☐ First deep clean
- ☐ Standard recurring
- ☐ Move-in
- ☐ Move-out
- ☐ Other

Property type

- ☐ House
- ☐ Apartment
- ☐ Condo
- ☐ Other

Bedrooms: _____

Bathrooms: _____

Approximate property size (sq ft): _____

First service date: _____

Usual service day: _____

Visit frequency

- ☐ Weekly
- ☐ Every 2 weeks
- ☐ Every 4 weeks
- ☐ One-time

Estimated visit duration: _____

Assigned cleaner / team: _____

3 · Services included

- ☐ Kitchen cleaning and exterior appliance wiping
- ☐ Bathroom cleaning and sanitizing
- ☐ Bedroom dusting and surface cleaning
- ☐ Living-area dusting and tidying of accessible surfaces
- ☐ Vacuuming carpets and rugs
- ☐ Sweeping and mopping suitable hard floors
- ☐ Emptying ordinary household trash
- ☐ Cleaning accessible, reachable surfaces
- ☐ Other agreed services (note below)

4 · Services not included unless separately agreed

- ☐ Inside ovens
- ☐ Inside refrigerators
- ☐ Interior windows
- ☐ Inside cabinets and drawers
- ☐ Laundry and ironing
- ☐ Wall washing or extensive wall spot-cleaning
- ☐ Heavy furniture moving
- ☐ Exterior cleaning
- ☐ Mold remediation or hazardous-material cleanup
- ☐ Other (note below)

Additional services must be discussed and priced before the work is performed.

5 · Access arrangements — access method

- ☐ Client present
- ☐ Key
- ☐ Lockbox
- ☐ Door code
- ☐ Other

Entry instructions: _____

Key / lockbox reference (no full security code):

_____

Alarm instructions (optional): _____

Parking instructions: _____

Pets & relevant instructions: _____

Areas that must remain locked or unopened:

_____

6 · Supplies & equipment — cleaning products supplied by

- ☐ Business
- ☐ Client
- ☐ Mixed

Equipment supplied by

- ☐ Business
- ☐ Client
- ☐ Mixed

Client-requested products or brands: _____

Products or surfaces to avoid: _____

Allergy or fragrance preferences: _____

Special floor, countertop or appliance-care instructions:

_____

7 · Communication & scheduling — preferred communication

- ☐ Text
- ☐ Email
- ☐ Phone

Contact number / email for appointment messages:

_____

Appointment reminders

- ☐ Yes
- ☐ No

To request a schedule change, contact the business as early as you can — at least 24 hours before the appointment where possible — and the new arrangement will be confirmed. Report a missed or incomplete task by text or email as soon as you notice it, so it can be put right at the next visit or sooner.

Preferred notice for cancellations: _____

8 · Payment basics

First deep-clean price ($): _____

Recurring service price ($): _____

Recurring frequency

- ☐ Weekly
- ☐ Every 2 weeks
- ☐ Every 4 weeks

Accepted payment methods

- ☐ Cash
- ☐ Card
- ☐ Bank transfer
- ☐ Check
- ☐ Other

Payment due

- ☐ At completion
- ☐ Within agreed number of days
- ☐ Other

Invoice delivery

- ☐ Email
- ☐ Printed
- ☐ Other

Tax, if applicable ($): _____

9 · Additional instructions

_____

_____

_____

_____

10 · Acknowledgement of receipt

I acknowledge that I have received this service details sheet and had the opportunity to review the arrangements recorded above. This sheet is an operational summary for reference. It is not a legal contract and does not replace any separately agreed terms.

Client name: _____

Client acknowledgement signature: _____

Date: _____

Prepared by: _____

Date: _____

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