

New client intake form

Everything the team needs before the first clean, collected once.

1. Client

Full name		Property address	
Phone		Billing address (if different)	
Email		How did you hear about us	
Preferred contact method		Best time to contact	

2. Property

Property type		Occupied / vacant / rental	
Bedrooms / bathrooms		Pets (type, where kept during visits)	
Approximate floor area		Children or other occupants to be aware of	
Floor types		Parking for our vehicle	

3. Access

	DETAIL
How we get in (key, lockbox, someone home, concierge)	
Lockbox location and code / key collection	
Alarm: code, panel location, how to disarm and set	
Gate, intercom or building access notes	
Anything we must lock, close or leave exactly as found	

4. Service

☐ Regular clean	Frequency (weekly, fortnightly, monthly, one-off)	
☐ Deep / spring clean	Preferred day and time window	
☐ End of tenancy / move-out	Start date	
☐ Post-build clean	Estimated hours per visit	
☐ Commercial / office		
☐ Other:		

5. Areas and priorities

AREA	INCLUDE	NOTES (WHAT MATTERS MOST, WHAT TO SKIP)
Kitchen	☐	

AREA	INCLUDE	NOTES (WHAT MATTERS MOST, WHAT TO SKIP)
Bathrooms		
Bedrooms		
Living areas		
Laundry		
Windows (inside / outside)		
Oven / fridge interior		
Outdoor areas, garage		
Other		

6. Products and health

- ☐ Use our standard products
- ☐ Use client-supplied products only (list below)
- ☐ Fragrance-free or low-chemical products required
- ☐ Allergies or sensitivities in the household:

PRODUCTS, SURFACES OR ITEMS TO AVOID, AND WHY

7. Billing and agreement

Quoted rate / price per visit	_____	Cancellation notice agreed (hours)	_____
Payment method	_____	Terms of service received and read	_____
Invoice to (name / email)	_____	Date	_____

Photos are taken before and after each visit for quality and record-keeping. They are not shared outside the business. Access details are stored securely and only given to team members rostered to this property.

Client signature	_____	For the business	_____
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