



CUSTOMER (First & Last Name): _____

Lead CM Name: _____

☐ Multiple Craftsmen: _____

SERVICE PATH

- ✓ Call evening before, adding notes in app
- ✓ Click **ON MY WAY**
- ✓ Be early or at least On-Time
- ✓ Click **START APPOINTMENT**
- ✓ Use AHS Approach & Shoe Covers
- ✓ Confirm project & **Get Signatures** on Estimate & Win Estimate to create Invoice
- ✓ Before Picture
- ✓ Complete Job & Clean up
- ✓ After Picture
- ✓ Ask if 100% Complete
- ✓ **Get Signature** on Invoice & **Collect Payment**
- ✓ Click **COMPLETE APPOINTMENT**
- ✓ Say "Thank You for Choosing Ace Handyman Services," ask for Review, & remind the customer to request you by name next time

DATE	TIME IN	LUNCH OUT	LUNCH IN	TIME OUT	BILLABLE HOURS	NB HOURS
/						
/						
/						
/						
/						

☐ CONSULTATION

- ☐ Free Estimate
 ☐ Consultation Fee Collected
- ☐ Craftsman Sent Estimate to Customer
 ☐ Office Needs to Send Estimate

☐ JOB

- ☐ Job Complete
 ☐ Job **Not** Complete
- ☐ My Assignment Complete
See Lead Craftsman's Paperwork for Detail
 ☐ Follow up Needed From Office
- ☐ Office Needs to Send Additional Estimate

PAYMENT INFORMATION (Attach Check & Receipts)

Invoice # _____ (if commercial) PO/WO # _____

INVOICE TOTAL \$ _____ TOTAL collected \$ _____

- ☐ Check
 ☐ Cash
 ☐ Credit Card
 ☐ Receipts
 ☐ OOP
- Check No: _____
 Office Initials Cash Received: _____
☐ Processed in Field ☐ Office Needs to Process
☐ Yes ☐ No
 \$ _____ ☐ Service Charge \$ _____

NOTES
