



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 |
|------|---------|-----------|----------|----------|----------------|----------|
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☐ CONSULTATION

☐ Free Estimate

☐ Consultation Fee Collected

☐ Craftsman Sent Estimate to Customer

☐ Office Needs to Send Estimate

☐ JOB

☐ Job Complete

☐ My Assignment Complete
See Lead Craftsman's Paperwork for Detail

☐ Job **Not** Complete

☐ 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

Check No: _____

☐ Cash

Office Initials Cash Received: _____

☐ Credit Card

☐ Processed in Field ☐ Office Needs to Process

☐ Receipts

☐ Yes ☐ No

☐ OOP

\$ _____ ☐ Service Charge \$ _____

NOTES

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