

Kept Straight

Customer Intake Pack

New Customer Intake Form - Blank template

Customer name: _____

Phone: _____

Email: _____

Service address: _____

Requested service: _____

Preferred date / time: _____

How did you hear about us? _____

Notes / special instructions:

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Customer Intake Pack

New Customer Intake Form - Filled-in example

Customer name: Maria Alvarez

Phone: (555) 214-9038

Email: maria.a@example.com

Service address: 418 Maple St, Springfield

Requested service: Repair leaky kitchen faucet

Preferred date / time: Weekday mornings

How did you hear about us? Nextdoor recommendation

Notes / special instructions:

Dog in the house - please call before arriving.

Water shut-off is under the sink.

Hypothetical example showing how a customer might use this template.