

Cleaning Client Intake Form

Practical cleaning business template • Customize fields before use

Brand customization: *This TidyOps-branded example shows a finished presentation. Replace the logo, colors, company details, and placeholders with your own brand before use.*

[YOUR COMPANY NAME]

[Phone Number]

[Email Address]

[Website]

CLIENT INFORMATION

Customer Name:

Company Name (if applicable):

Phone:

Email:

Preferred Contact Method:

☐ Phone

☐ Text

☐ Email

Best Time to Contact:

SERVICE ADDRESS

Street Address:

City:

State:

ZIP / Postal Code:

Property Type:

☐ House

☐ Apartment

☐ Condo

☐ Townhome

☐ Vacation Rental

☐ Office

☐ Commercial Facility

☐ Other:

PROPERTY DETAILS

Approximate Square Footage: sq. ft.

Bedrooms:

Full Bathrooms:

Half Bathrooms:

Floors / Levels:

Occupancy:

☐ Occupied

☐ Vacant

☐ Partially Occupied

Property Condition:

☐ Light Cleaning Needed

☐ Average

☐ Heavy Buildup

☐ Unsure / Needs Assessment

REQUESTED SERVICE

Service Type:

☐ Standard Cleaning

☐ Deep Cleaning

☐ Move-In Cleaning

☐ Move-Out Cleaning

☐ Recurring Cleaning

☐ Airbnb / Turnover Cleaning

☐ Office Cleaning

☐ Commercial Cleaning

☐ Post-Construction Cleaning

☐ Custom Service

Requested Frequency:

☐ One-Time

☐ Weekly

☐ Every 2 Weeks

☐ Every 4 Weeks

☐ Monthly

☐ Other:

DESIRED START DATE

Preferred Start Date:

Preferred Service Days:

- ☐ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday
- ☐ Sunday

Preferred Time:

- ☐ Morning
 - ☐ Midday
 - ☐ Afternoon
 - ☐ Evening
 - ☐ Flexible
-

SERVICE PRIORITIES

What are the most important areas for us to focus on?

- ☐ Kitchen
- ☐ Bathrooms
- ☐ Bedrooms
- ☐ Living Areas
- ☐ Floors
- ☐ Dusting
- ☐ Baseboards
- ☐ Pet Hair
- ☐ Organization
- ☐ Other:

Additional Details

OPTIONAL SERVICES

Select any services you may be interested in.

- ☐ Inside Refrigerator
 - ☐ Inside Oven
 - ☐ Inside Cabinets
 - ☐ Interior Windows
 - ☐ Blinds
 - ☐ Detailed Baseboards
 - ☐ Bed Linen Changes
 - ☐ Laundry
 - ☐ Dishes
 - ☐ Pet Hair Removal
 - ☐ Wall Spot Cleaning
 - ☐ Organization
 - ☐ Carpet Cleaning
 - ☐ Other:
-

PETS

Are there pets at the property?

- ☐ No
- ☐ Yes

If yes:

Type / Number of Pets:

Pet Names:

Will pets be present during service?

- ☐ Yes
- ☐ No
- ☐ Unsure

Pet Instructions

PROPERTY ACCESS

How should the cleaning team enter the property?



- ☐ Customer Will Be Present
- ☐ Door Unlocked
- ☐ Key
- ☐ Lockbox
- ☐ Smart Lock
- ☐ Keypad / Access Code
- ☐ Concierge / Front Desk
- ☐ Property Manager
- ☐ Other:

Access Instructions

Parking Instructions:

SECURITY

Alarm System:

- ☐ No
- ☐ Yes

If yes:

Alarm Instructions:

Restricted / Off-Limit Areas:

SPECIAL SURFACES / ITEMS

Does the property contain any surfaces or items requiring special care?

- ☐ Natural Stone
- ☐ Hardwood
- ☐ Specialty Flooring
- ☐ Antique Furniture
- ☐ Artwork
- ☐ Delicate Fixtures
- ☐ Specialty Appliances
- ☐ Unsealed Surfaces



☐ Other:

Special Care Instructions

CLEANING PRODUCTS

Product Preference:

☐ Cleaning Company Products

☐ Customer-Supplied Products

☐ Fragrance-Free

☐ Other:

Known Product Restrictions / Preferences:

ALLERGIES / SENSITIVITIES

Please list any cleaning-product sensitivities, fragrance preferences, or other relevant concerns.

CURRENT CLEANING SITUATION

Do you currently use a cleaning service?

☐ No

☐ Yes

If yes:

Current Cleaning Frequency:

Reason for Considering a Change:

HOW DID YOU HEAR ABOUT US?

☐ Google Search

☐ Referral

☐ Facebook



- ☐ Instagram
- ☐ Nextdoor
- ☐ Yelp
- ☐ Existing Customer
- ☐ Property Manager
- ☐ Realtor
- ☐ Other:

Referral Name (if applicable):

QUOTE INFORMATION

How would you prefer to receive your quote?

- ☐ Email
- ☐ Text
- ☐ Phone
- ☐ In Person

Is an onsite walkthrough needed?

- ☐ Yes
- ☐ No
- ☐ Unsure

Preferred Walkthrough Date:

BUDGET / PRICING EXPECTATIONS

Optional.

Expected Budget:

- ☐ Under \$100
 - ☐ \$100-\$199
 - ☐ \$200-\$299
 - ☐ \$300-\$499
 - ☐ \$500+
 - ☐ Unsure
-

ADDITIONAL INFORMATION

Is there anything else we should know about your property or cleaning needs?

INTERNAL USE

Lead Source:

Lead Status:

- ☐ New
- ☐ Contacted
- ☐ Qualified
- ☐ Walkthrough Scheduled
- ☐ Estimate Sent
- ☐ Follow-Up Needed
- ☐ Won
- ☐ Lost

Assigned To:

Estimated Value: \$

Next Follow-Up Date:

Internal Notes

CUSTOMER ACKNOWLEDGMENT

I confirm that the information provided is accurate to the best of my knowledge.

I understand that final pricing may change if the actual property condition, size, access requirements, or requested scope differs materially from the information provided.

Customer Name:

Signature:

Date:

PRIVACY & CUSTOMIZATION NOTICE

Only collect information your business actually needs.

If you collect access codes, alarm details, payment information, or other sensitive customer data, use appropriate security controls and comply with applicable privacy and data-protection requirements.



Do not include payment card information, passwords, or unrelated sensitive information on a general intake form.

Customize this form for your service types, customer requirements, and local obligations.

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Provided by TidyOps