New Customer Checklist

Account Representative

Account Name: Start Date:

Job Start Time	Is this a set time?	Estimated working hours	How many people needed?	Square Footage

☐	Onboarding	**Send an email to the customer and CC Admin:** “Hi ___ I have cc’d the office in this email. They will be sending over forms needed to get started for E - Signature.
☐	Proposal	Make sure the proposal is attached in the email when cc'ing the office the customer is ready to move forward.
☐	Update CRM JaniBid	**CRM JaniBid:** Convert “lead” to "customer” then create a schedule under the customer and leave it as unassigned
☐	Email Send this Form	Email this completed for to Admin - Title: New Customer Checklist- (Customer Name). Attach the proposal and this checklist to the email.

Account Rep: **Date:**

Admin / Office

☐	Respond to start email	Introduce yourself, let them know they will be getting an email from you for an E signature software. If needed call and get requested start date.
☐	Ready to move forward	Send customer agreement and enrollment package, most accounts need a week notice to get started. If they need to get started sooner, please inform Scheduling.
☐	Paperwork received	Email customer and let them know you received the forms, cc the account rep
☐	Update CRM JaniBid	Update CRM JaniBid with all information from the customers completed paperwork: Contact information, days cleaned, paper product delivery, assign Account Representative and Staff Manager, etc. Add any notes you have to the account under customer needs.
	Is the account contracted?	Yes ☐ No ☐ Who is the contractor? Contracted amount?
☐	New Account Walk	Schedule a New Account Walk with client, Account Representative and Staff Manager. If the account will be serviced during the day, before 3pm, please schedule the appointment with Day Staff Manager; if we will be servicing the account in the evening, after 3pm, please schedule the walk with Evening Staff Manager. Follow up with the staff manager after the walk and gather key and alarm information. Key ☐ Fob ☐ Key Card ☐ Lockbox ☐ Alarm Code
☐	Scope of Work	Email scope of work and any details important to this account to the assigned staff manager.
☐	Follow up reminder	Send a calendar reminder to the rep to follow up with the customer after first cleaning.
☐	Update Master Account List	Update you Master Account List, Account Manager List and Staff Manager List
	Email complete package to Office Manager	Email title: New Customer/ Customer Name /Start Date Agreement ☐ Enrollment ☐ Proposal ☐ Checklist ☐

Office Manager.

☐ Verify Documents	Review all the documents to ensure all information is accurate.
☐ Send Location Acceptance	If the account will be contracted out, edit and send the Location Acceptance Form to the contractor. Once returned, upload to the CRM JaniBid.
☐ Send paperwork to accounting	The day after the account has been started send over all documents to accounting for invoice purposes.

Note: update start date above in CRM if different from actual start date.

Accounting

☐ Update Invoice sheet	Update Monthly Invoice Sheet with New Client details (Price, 30 net, mail, credit card, email, PO numbers, invoice last day of month etc)
☐ Calculate Cleaning Price	Calculate and input daily cleaning price in JaniBid under **Account Details**.
☐ Update QuickBooks	Update QuickBooks with all the information.
☐ Send Welcome Email	Send welcome email to customer.
☐ Send Invoice	Send invoice ASAP.
☐ Create Invoice Templates	Create invoice templates for all re-occurring customers.
☐ If Contractor	Add details to the Invoice sheet
☐ Update paper supplies in account notes in CRM	Paper delivery yes/no.
☐ CRM- JaniBid Verification	Verify all paperwork is in JaniBid.