Service business client intake form

Capture a new service enquiry before preparing an estimate or booking an assessment. Keep customer details, the service location, requested work and the next action in one editable form.

Your business	Enquiry reference	Date received
[Enter details]	[Enter details]	[Enter details]

Customer or company	Contact name
[Enter details]	[Enter details]

Email address	Telephone	Preferred contact method
[Enter details]	[Enter details]	[Enter details]

Service address and unit or area

[Enter details]

Requested service or problem in the customer's words

[Enter details]

Relevant details and information still needed

[Enter details]

Preferred visit window	Site contact or coordination needed
[Enter details]	[Enter details]

Photo or document references	Related request or existing customer reference
[Enter details]	[Enter details]

Next action

[Enter details]

Assigned owner	Follow-up date
[Enter details]	[Enter details]

Powered by Hilli

Using this resource

Service business client intake form

1. Enter your business name, the enquiry reference and the date received.

2. Record the customer and service location, plus the contact method they prefer.

3. Describe the requested work in the customer's words. Record useful references and any information still needed.

4. Note preferred appointment windows and any site coordination required.

5. Assign the next action and follow-up date. Confirm scope, price and appointment details separately.

Fictional example

Example Service Co. receives enquiry ENQ-104 from Morgan Example at morgan@example.com for a repair assessment at 200 Example Street, unit 4.

The customer reports a sticking interior door and prefers a weekday afternoon assessment. Photo reference IMG-104 is available. Jordan will confirm the site contact and offer an assessment window by 2026-11-03. No appointment or price is confirmed by the enquiry.

Working notes

Use for a prospective service customer or assessment enquiry. The resident maintenance-request form serves a different purpose.

An enquiry does not confirm a booking, authorize work or accept an estimate.

Use document or photo references. Share access instructions through your approved process and keep completed forms private.

Powered by Hilli

Keep maintenance work together

Turn a service enquiry into work that the team can follow. Hili helps service businesses keep customer requests, assigned work and related messages together.

Explore Hili

License and use notice

Permission to use and modify

Copyright 2026 Hili AI Inc. These templates and examples are licensed under Creative Commons Attribution 4.0 International (CC BY 4.0). You may copy, modify, and redistribute them, including commercially, under that license. License: https://creativecommons.org/licenses/by/4.0/

Credit and scope

When sharing, retain reasonable credit, the license link and disclaimer notice, and identify changes. Suggested credit: Template by Hili AI Inc., https://hiliai.com/, CC BY 4.0; modified by [name] if applicable. The license covers only copyright and similar rights Hili AI Inc. holds, if any. It does not claim rights in your entered data, facts, ideas, or other unprotected material.

Informational use only

These general planning and recordkeeping aids are not legal, tax, engineering, safety, or other professional advice; contracts; emergency reporting services; or compliance certifications. They do not replace qualified judgment, inspections, manufacturer guidance, or applicable requirements. Check suitability, calculations, permissions, and local requirements before relying on a template.

No warranty and limitation of liability

Materials are provided AS IS and AS AVAILABLE. To the fullest extent permitted by law, Hili AI Inc. and its directors, officers, employees, contractors, and contributors disclaim warranties, including accuracy, completeness, fitness, merchantability, and non-infringement, and liability for losses or damage arising from use, modification, or inability to use the materials. No outcome is guaranteed. Nothing excludes rights or liability that cannot lawfully be excluded. CC BY 4.0 Section 5 governs its warranty and liability provisions.

Branding privacy and changes

The Powered by Hili capsule identifies the template source. It does not imply Hili prepared, reviewed, verified or endorsed completed content or recorded services. Users are responsible for their changes, entered data and checking suitability. The final Hili page or tab may be removed; keep reasonable attribution and the license and disclaimer notices with shared copies, for example in the accompanying Hili-LICENSE.txt file. Hili names and logos are excluded from this content license except for source attribution; no other trademark rights or endorsement are granted. Example records are fictional. Keep completed records private and share only information you have permission to use.

License controls

This notice does not add restrictions to CC BY 4.0. The full license controls: https://creativecommons.org/licenses/by/4.0/legalcode.en. Version 1.1, issued 2026-10-29.

Resource version 3.0.0 · Issued 2026-10-30

Powered by Hili