Me In Order™

Client Forms

What They Are and When to Use Them

Consignment Items Release:

- Have the client sign this form when you will be taking items on their behalf for consignment. This way you have documentation before you leave their residence as to what you are taking with you.

  Tip: *Don't forget to charge the client for taking care of this for them.*

Credit Card Authorization:

- Use this form when a client will not be present when it's time to collect payment for the session. You can use the information from the form to run the card via Square before you leave the client's home.
- The form may also be used for clients that would prefer not to be bothered by having to provide payment after each session. They can simply leave you with authorization to process their payments via this form.

  Tip: *Keep this form in a safe place until it can be shredded. Do NOT throw this form in the garbage.*

Damage Claim:

- Use this form when you or a teammate breaks or damages an item in the client's home.
- The form is designed to be filled out by the client but feel free to fill in the contact information for them.
- Scan and upload a copy of the document to the client's profile and leave the original with the client.

  Tip: *Ask the client if they would like to fill out a damage claim form before beginning to fill it in. In many cases the client will not want to make a claim.*

Discarded Items Release:

- Use this form when taking items from a client's home that you will be discarding on their behalf.

  Tip: *Use your best judgment when requesting that a client sign this form. It may not always be necessary.*

File Index:

- Use this form when a client would like an index of their filing system.

Files Folder List:

- Use this list to establish a new filing system for a client.

Initial Walk – thru:

- Use this form for an initial walk thru with a new client.

  Tip: *This form is best used during client assessments. It gives you a space to take notes for each area of the home that you visit.*

Invoice (Blank):

- Not everyone feels comfortable with getting their paid invoice / receipt sent to them electronically. For that not-so-tech-savvy client feel free to use this paper invoice for their records.

  Tip: *Please still submit your checkout transaction via Square as you normally would.*

Membership Agreement

- This agreement is provided to the client during the checkout process of purchasing a membership with you. However, if they want a paper copy of it, you have one available for them.

Membership Cancellation Request

- This form is required for a membership client to cancel their membership with you. It's available for them to download via the Membership Agreement. However, you may also provide them with a paper copy from your Client Forms portfolio.

Photo Release:

- This form should be signed by the client when you take photos that could be used for marketing materials.

  Tip: *If you think you have high quality before-and-after pictures, then have the client sign one of these forms.*

Record Keeping Guide:

- This guide can be provided to any client that has questions about how long to keep certain documents.

Time Log:

- This form would be used when a third party is paying for your services, and they require that we provide verification of how many hours you were with the client.

Today Card (Printable):

- Use this in place of our "Today Card" when you are out of the cardstock version.

Work Authorization:

- Use this form when one or both of the following conditions apply:
    - 1. The client requests something in writing regarding the work that is being done.
    - 2. The client leaves you or the team alone on the premises.

  Tip: *When a client steps out you will want them to sign this form. Advise them that if someone contacts the police because there are strange people taking items out of their neighbors home you will need to provide a document to the police that states that you are allowed to be there! The client will feel more confident with you because you are prepared for all situations!*