

PREMIUM U.S. DOCUMENTATION SYSTEM

Bilingual Home Service Business Operations Kit

An English-Spanish field-to-payment workflow for U.S. cleaning and home-service teams

12 WORKFLOWS	3 FORMATS	US LETTER
Purpose-built	Word + PDF + Excel	8.5 x 11 inches

What's included

WORKFLOWS 01-06	WORKFLOWS 07-12
01 Customer Inquiry & Contact Record / Registro de Consulta y Contacto	07 Crew Work Order & Instructions / Orden de Trabajo e Instrucciones
02 Service Site, Access & Safety Profile / Perfil del Sitio, Acceso y Seguridad	08 Arrival, Departure & Key Custody Log / Registro de Llegada, Salida y Llaves
03 Walk-Through & Needs Assessment / Recorrido y Evaluación de Necesidades	09 Quality Inspection & Customer Feedback / Inspección de Calidad y Comentarios
04 Estimate & Scope Worksheet / Hoja de Presupuesto y Alcance	10 Change & Extra Work Authorization / Autorización de Cambio y Trabajo Extra
05 Service Options & Add-On Menu / Menú de Servicios y Opciones	11 Incident & Damage Documentation / Registro de Incidente y Daño
06 Appointment Confirmation & Reminder / Confirmación y Recordatorio de Cita	12 Service Completion, Invoice & Payment Handoff / Entrega, Factura y Pago

START HERE: Keep an untouched backup. Replace bracketed prompts, review every entry, and store sensitive files securely. The templates support organization and communication; they do not replace policy terms, official school records, emergency plans, or professional advice.

Reference sources: <https://data.census.gov/table/ACSDT1Y2023.C16001> | <https://www.sba.gov/counseling/manage-your-business/>

WORKFLOW 01 OF 12

Customer Inquiry & Contact Record /

Registro de Consulta y Contacto

Capture the first request consistently and confirm the customer's preferred language and next step.

FIELD	DETAIL
Business / Empresa	[Business name / Nombre de la empresa]
Customer / Cliente	[Name / Nombre]
Preferred language / Idioma preferido	[English / Español / Other]
Phone / Teléfono	[Number / Número]
Email / Correo electrónico	[Address / Dirección]
Service address / Dirección del servicio	[Street, city, state, ZIP]
Service requested / Servicio solicitado	[Brief request / Solicitud breve]
Next contact / Próximo contacto	[Owner, date, method / Responsable, fecha, método]

Quick check

DONE	ACTION
☐	Confirm spelling and preferred contact method / Confirmar ortografía y metodo de contacto
☐	Record how the customer found the business / Registrar como encontro la empresa
☐	Avoid promising a price before reviewing scope / Evitar prometer precio antes de revisar el alcance
☐	Assign one clear next action / Asignar una proxima accion clara

IMPORTANT: Use the customer's preferred language for operational communication when your team can support it. This form does not establish contractual terms.

WORKFLOW 02 OF 12

Service Site, Access & Safety Profile / Perfil del Sitio, Acceso y Seguridad

Prepare the crew with practical site, access, and customer-approved safety information.

FIELD	DETAIL
Service address / Dirección	[Address / Dirección]
On-site contact / Contacto en el sitio	[Name and phone / Nombre y teléfono]
Parking / Estacionamiento	[Instructions / Instrucciones]
Entry / Entrada	[Customer-approved method / Método aprobado]
Alarm / Alarma	[Procedure - no passwords / Procedimiento - sin contraseñas]
Pets / Mascotas	[Type and plan / Tipo y plan]
Restricted areas / Áreas restringidas	[Do not enter / No entrar]
Known site notes / Notas conocidas	[Customer-provided information / Información del cliente]

Quick check

DONE	ACTION
☐	Confirm access before dispatch / Confirmar acceso antes del envío
☐	Do not record alarm codes or passwords / No registrar códigos ni contraseñas
☐	Follow applicable safety procedures / Seguir procedimientos de seguridad aplicables
☐	Report changing conditions to the supervisor / Informar cambios al supervisor

IMPORTANT: This profile records customer-provided site information. It does not replace training, hazard assessment, required protective equipment, or emergency procedures.

WORKFLOW 03 OF 12

Walk-Through & Needs Assessment / Recorrido y Evaluación de Necesidades

Turn the site walk-through into a shared, room-by-room service plan before pricing.

Area / Área	Requested result / Resultado solicitado	Current condition / Condición actual	Frequency / Frecuencia	Access or material note / Nota de acceso o material	Priority / Prioridad

Quick check

DONE	ACTION
☐	Ask what success looks like / Preguntar como se ve un buen resultado
☐	Separate standard work from add-ons / Separar trabajo estandar de extras
☐	Photograph only with permission / Fotografiar solo con permiso
☐	Confirm exclusions in writing / Confirmar exclusiones por escrito

IMPORTANT: Document observable conditions and customer requests. Do not make claims about mold, contamination, structural conditions, or other matters requiring qualified assessment.

WORKFLOW 04 OF 12

Estimate & Scope Worksheet / Hoja de Presupuesto y Alcance

Build an itemized estimate that connects price, quantity, scope, and approval.

FIELD	DETAIL
Estimate no. / Número	[Identifier / Identificador]
Prepared for / Preparado para	[Customer / Cliente]
Prepared on / Fecha	[MM/DD/YYYY]
Valid through / Válido hasta	[Date / Fecha]

Service / Servicio	Area / Área	Qty / Cant.	Unit / Unidad	Unit price / Precio unitario	Line total / Total	Included note / Nota incluida

IMPORTANT: Confirm taxes, fees, deposits, cancellation terms, and required disclosures separately. The workbook calculates line totals from entered quantity and unit price.

WORKFLOW 05 OF 12

Service Options & Add-On Menu / Menú de Servicios y Opciones

Present consistent choices without mixing optional work into the base scope.

Category / Categoría	Service / Servicio	What is included / Qué incluye	Price method / Método de precio	Price / Precio	Selected / Seleccionado

Quick check

DONE	ACTION
☐	Label optional work clearly / Marcar claramente el trabajo opcional
☐	Use consistent pricing units / Usar unidades de precio consistentes
☐	Confirm material limitations / Confirmar límites de materiales
☐	Record customer selection / Registrar selección del cliente

IMPORTANT: Customize services and pricing to the business. Avoid presenting optional work as required unless it is actually necessary and explained.

WORKFLOW 06 OF 12

Appointment Confirmation & Reminder / Confirmación y Recordatorio de Cita

Reduce missed visits by confirming time, access, preparation, and communication preferences.

FIELD	DETAIL
Customer / Cliente	[Name / Nombre]
Service date / Fecha del servicio	[MM/DD/YYYY]
Arrival window / Ventana de llegada	[Time range / Horario]
Service address / Dirección	[Address / Dirección]
Crew or technician / Equipo o técnico	[Name / Nombre]
Customer preparation / Preparación del cliente	[Approved instructions / Instrucciones aprobadas]
Access confirmation / Confirmación de acceso	[Method / Método]
Reschedule contact / Contacto para reprogramar	[Phone / Teléfono]

Quick check

DONE	ACTION
☐	Send in the preferred language / Enviar en el idioma preferido
☐	Confirm pets and access / Confirmar mascotas y acceso
☐	Do not include sensitive codes / No incluir códigos sensibles
☐	Record confirmation status / Registrar estado de confirmación

IMPORTANT: Use the business's approved cancellation, late-arrival, and rescheduling language. Requirements may vary by location and service type.

WORKFLOW 07 OF 12

Crew Work Order & Instructions / Orden de Trabajo e Instrucciones

Give the field team one approved scope, sequence, and completion standard.

FIELD	DETAIL
Work order no. / Número	[Identifier / Identificador]
Customer / Cliente	[Name / Nombre]
Date and window / Fecha y horario	[Date and time / Fecha y hora]
Crew lead / Líder del equipo	[Name / Nombre]

Area / Área	Task / Tarea	Method or product / Método o producto	Do not do / No hacer	Completion check / Verificación	Owner / Responsable

IMPORTANT: Use only approved methods, products, equipment, and safety procedures. The work order does not replace training or supervision.

WORKFLOW 08 OF 12

Arrival, Departure & Key Custody Log /

Registro de Llegada, Salida y Llaves

Maintain a transparent record of site access and customer-authorized key or device custody.

Date / Fecha	Team member / Miembro	Arrived / Llego	Departed / Salio	Key or device ID / ID de llave	Received from / Recibido de	Returned to / Devuelto a	Status / Estado

IMPORTANT: Use a coded identifier instead of recording access codes. Follow the business's custody, privacy, and incident procedures.

WORKFLOW 09 OF 12

Quality Inspection & Customer Feedback / Inspección de Calidad y Comentarios

Close the loop with observable quality checks, corrections, and customer feedback.

Area / Área	Standard checked / Criterio revisado	Pass / Cumple	Correction needed / Corrección	Owner / Responsable	Due / Fecha	Closed / Cerrado

Quick check

DONE	ACTION
☐	Inspect against the approved scope / Revisar contra el alcance aprobado
☐	Record specific corrections / Registrar correcciones específicas
☐	Invite brief customer feedback / Solicitar comentario breve
☐	Close each open item / Cerrar cada punto abierto

IMPORTANT: Describe observable results and agreed corrections. Do not make guarantees beyond the business's approved written terms.

WORKFLOW 10 OF 12

Change & Extra Work Authorization / Autorización de Cambio y Trabajo Extra

Document a customer-requested change before extra time, materials, or cost are added.

FIELD	DETAIL
Original estimate / Presupuesto original	[Number / Número]
Requested by / Solicitado por	[Name / Nombre]
Request date / Fecha	[MM/DD/YYYY]
Reason / Motivo	[Customer request or discovered condition / Solicitud o condición]

Added or removed work / Trabajo agregado o eliminado	Time change / Cambio de tiempo	Material change / Cambio de material	Price change / Cambio de precio	Approved by / Aprobado por	Approval date / Fecha

IMPORTANT: Obtain approval using the method required by the business and applicable law before performing changed work. This template is not a contract or legal advice.

WORKFLOW 11 OF 12

Incident & Damage Documentation /

Registro de Incidente y Daño

Create a factual timeline when an incident, damage concern, or near miss is reported.

FIELD	DETAIL
Incident ID / ID del incidente	[Identifier / Identificador]
Date and time / Fecha y hora	[MM/DD/YYYY and time]
Location / Lugar	[Area / Área]
Reported by / Reportado por	[Name and role / Nombre y función]

Observation / Observación	Immediate action / Acción inmediata	People notified / Personas notificadas	Photo or record ID / ID de foto	Follow-up owner / Responsable	Status / Estado

Quick check

DONE	ACTION
☐	Address immediate safety first / Atender primero la seguridad
☐	Record facts, not blame / Registrar hechos, no culpa
☐	Preserve relevant records / Conservar registros relevantes
☐	Follow insurance and reporting procedures / Seguir procedimientos de seguro y reporte

IMPORTANT: For emergencies, call 911. Follow the business's safety, insurance, employment, and required reporting procedures.

WORKFLOW 12 OF 12

Service Completion, Invoice & Payment Handoff / Entrega, Factura y Pago

Finish the job with a shared record of completed scope, open items, charges, and payment status.

FIELD	DETAIL
Customer / Cliente	[Name / Nombre]
Work order / Orden de trabajo	[Number / Número]
Completion date / Fecha de finalización	[MM/DD/YYYY]
Invoice no. / Número de factura	[Identifier / Identificador]

Completed item / Trabajo completado	Open item / Pendiente	Owner / Responsable	Due / Fecha	Charge / Cargo	Paid / Pagado	Balance / Saldo

IMPORTANT: Confirm payment methods, taxes, deposits, receipts, refunds, and collection procedures separately. The workbook summarizes entered charges and payments.