

Implementation Guide for Service Agreement

Introduction

This Service Agreement is designed to be used by your business and your clients for providing exterior cleaning and related services. The Agreement covers all important terms and conditions, and it should be thoroughly reviewed and customized before being sent to clients. Below is a guide on how to implement and customize the Agreement for your business needs.

Step-by-Step Instructions

1. Review the Entire Document

Before sending out this Agreement, it is essential that you thoroughly review all sections of the document. Make sure the terms and conditions are appropriate for your business operations and service offerings. Pay special attention to the following sections:

- **Company Information:** Ensure that your company name, address, contact details, and any other relevant business information are accurately filled in.
- **Description of Services:** Customize the list of services covered by the Agreement to include all the exterior cleaning and soft washing services your business provides. Add any services that are specific to your operations, and remove anything that does not apply to your business.
- **Payment Terms:** Verify the pricing structure, payment schedules, and accepted methods of payment to align with your current business policies.
- **Access Requirements:** Confirm that the access requirements reflect the necessary preparations for the services you provide (e.g., moving furniture, turning on water, and clearing driveways).

2. Add Additional Services

If your business provides services beyond those listed in the contract, be sure to add them to the Description of Services section. You can include specialized services such as:

- Gutter cleaning
- Window washing
- Roof washing
- Pressure washing for commercial properties
- Seasonal cleaning services (e.g., post-storm debris removal)

Important: Ensure that all services offered are clearly listed, as this will be crucial for both you and the client during the course of the agreement.

3. Modify Exclusions if Necessary

Review the Exclusions section and ensure that it covers all the necessary limitations on your services. This will help protect your business from liability in cases of damage that falls outside the scope of your work. If there are any additional exclusions unique to your business, add them here.

4. Personalize the Acceptance of Terms

The Acceptance of Terms section will be automatically populated when using the QuotelQ platform, but if you're sending the Agreement outside of QuotelQ (for example, via email or a PDF), make sure the client understands that by accepting the estimate or scheduling the appointment, they are agreeing to the terms outlined in the document. You may want to add a sentence reminding clients to review the Agreement before confirming their service.

How to Use the Service Agreement

1. Sending the Agreement Outside of QuotelQ

When sending an estimate or proposal outside of QuotelQ (e.g., via email), you can attach this Service Agreement as a PDF. Make sure that the client is aware that the Agreement must be reviewed and accepted before work can proceed. You may want to include a brief message such as:

"Please find attached the Service Agreement for your review. By accepting the estimate and scheduling the appointment, you agree to the terms and conditions outlined in the Agreement. If you have any questions or would like to make modifications, feel free to reach out."

Once the client reviews and agrees to the terms, they can either sign the document digitally or return a signed copy to you.

2. Sending the Agreement with Every Estimate Automatically in QuotelQ

If you're using the QuotelQ app to generate estimates, you can attach the Service Agreement to every estimate automatically. When the client receives and accepts the estimate via QuotelQ, they will also accept the terms and conditions of this Agreement. The acceptance will be documented within the QuotelQ system for your records.

Note: This method ensures that you do not have to manually attach the Agreement to each estimate, and it simplifies the process of tracking which clients have agreed to the terms. Once accepted digitally through QuotelQ, the Agreement is stored within the system, making it easy to access and refer to later.

3. Digital Acceptance and Documentation

When the Service Agreement is accepted digitally within QuotelQ, it will be recorded in the system as part of the client's estimate. This documentation will serve as proof that the client has agreed to the terms and is legally bound by them.

Important Notes

- **Always Make Sure the Client Reviews:** It's important that the client fully understands the terms before agreeing to them. Encourage them to reach out with any questions they might have before signing.
- **Modify as Needed:** As your business evolves or laws change, you may need to update this document. Make sure to check the Agreement periodically to ensure it remains relevant and legally sound.
- **Legal Advice:** While this Agreement is designed to protect your business, it's always a good idea to consult with a legal professional to ensure that it complies with local laws and regulations.

Conclusion

This Service Agreement ensures that your business has clear, comprehensive, and legally binding terms in place for each service you provide. By following this guide, you'll ensure a smooth and professional experience for both you and your clients, whether you're sending the Agreement through QuoteIQ or separately.

This guide is meant to help streamline the process of using the Service Agreement with clients and ensures everything is covered without needing frequent manual updates. Let me know if you'd like further modifications!