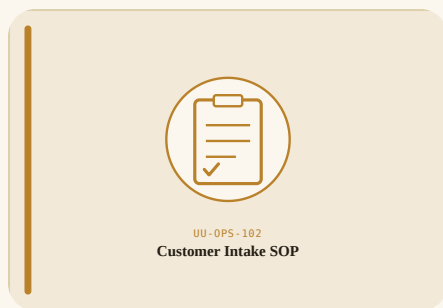


Customer Intake SOP: What to Document Before a Job Starts

The checklist that prevents most scope and price disputes before they start.



1. Why intake is a quality control step, not just paperwork

Most disputes about scope, price, or "that's not what I asked for" trace back to what wasn't documented at intake, not to a disagreement about workmanship. A consistent intake process — the same questions asked and recorded the same way for every job — protects the shop and sets the customer's expectations correctly from the start.

2. What to document before a job starts

- **Customer contact information** and preferred communication method (phone, text, email).
- **Item description** — type of furniture, approximate age/origin if known, manufacturer if identifiable.
- **Existing condition**, photographed from multiple angles before any work begins — including any pre-existing damage, stains, frame issues, or wear the customer should be aware is already present.

- **Scope of work** in the customer's own words, then translated into specific line items (re-cover only, frame repair, suspension rebuild, cushion refill, etc.).
- **Material source** — shop-supplied fabric (and which one, confirmed by sample/swatch number) or customer-supplied material (COM), with a note on who is responsible for sufficient yardage if COM.
- **Special requests** — pattern matching requirements, nailhead/trim details, firmness preference, anything beyond a standard re-cover.
- **Quoted price and what it assumes** (see *Estimating & Bidding, UU-OPS-101*) — stated as being contingent on the documented condition, with a clear process for how a change (e.g. a frame issue found mid-job) gets priced and approved.
- **Promised turnaround** and what it's contingent on (e.g. material arrival date).
- **Payment terms** agreed and recorded.

3. Customer-supplied material (COM) — its own checklist

COM jobs carry risk the shop doesn't control, so document it explicitly at intake:

- Confirm yardage is sufficient for the job *before* work begins, accounting for pattern repeat and nap direction — and get it in writing if the customer is asked to supply more.
- Inspect COM fabric for defects (flaws, inconsistent dye lots, inadequate backing) before cutting, and flag any concern to the customer before proceeding — a defect found after the fabric is cut and installed is a much harder conversation.
- Clarify who bears the cost if COM fabric turns out insufficient or defective partway through the job — decide this policy once, apply it consistently, and state it at intake rather than negotiating it mid-job.

Shop practice

Treat the intake photos and documented condition as the baseline the final inspection (*UU-OPS-104*) gets compared against — it's the fastest way to resolve a "was that damage already there?" conversation with evidence instead of memory.

4. Turning intake into the written quote

Everything documented at intake should show up on the customer-facing quote or work order — not live only in a notebook or an employee's memory. A customer who can see their own

stated scope reflected back to them in writing is far less likely to dispute it later.

Sources

General shop operating framework. Adapt the checklist to the specific intake tools (paper work order, CRM, shop management software) your shop uses.

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