

Customer Record Card

Keep one card per customer so the history of what was done, what it cost and when the next visit is due lives in one place.

One card per customer: how to reach them, what they have had done, and what they were charged.

HOLD LESS THAN YOU THINK YOU NEED
Keep only what you need to do the work, tell people what you hold, and store it somewhere safe. Rules on holding personal information differ by country and apply to paper as much as to computers.

Customer

Account or reference

Since

Address

Phone

Email

Preferred contact

Access notes — gate codes, parking, dogs

WORK DONE

Date	Job or visit	Who attended	Invoice	Charged	Paid	Next due

Notes — preferences, past problems, anything the next visit should know