WORKING RESOURCE / 2026

Customer communication kit

Message templates and operating checks for quotes, payments and appointments.

How to use this kit

- [ ] Choose the worksheet for the task you are reviewing with the client.
- [ ] Complete the fields, then record evidence for each completion check.
- [ ] Name an owner for unresolved items and agree the next review date.
- [ ] Use the editable Markdown and CSV companions when you need more space.

Included worksheets

01 Payment message send check

02 Quote follow-up record

03 Event and message worksheet

04 Cancellation policy decisions

05 Reschedule record and send check

Bracketed text is an editing placeholder, not a verified software variable. Replace every placeholder and check the source record before sending.

Editable files: getmanageit.io/downloads/manageit/customer-communication-kit-editable.zip

WORKSHEET 01

Payment message send check

Select the message from the verified payment state.

Client: _____ Owner: _____ Date: _____

1. Invoice number and designated recipient

2. Payment status and source record

3. Amount received, currency and date

4. Remaining balance on this invoice

5. Next agreed amount and trigger

6. Verified receipt link or attachment

7. Sender and monitored reply route

8. Reviewer, send date and delivery follow-up

Completion checks

- [ ] Pending payments are not described as received
- [ ] Paid in full applies only to the checked invoice
- [ ] No card details or credentials are included
- [ ] A queued message is not assumed delivered

MESSAGE TEMPLATE

When the invoice is fully paid

Replace every bracketed placeholder with checked details. This is reusable wording, not a software-variable specification.

Subject: Payment received for invoice [number]

Hi [first name],

Thank you. We've received [amount and currency] on [payment date] for invoice [number], covering [brief service description].

This invoice is now paid in full. You can find your receipt at [verified receipt link or attached receipt].

[Include an actual next service step only if one is confirmed.]

If you need us to check anything, reply here or contact [monitored route].

[Staff name]
[Business name]

Before sending: check the recipient, the current source record, the reply route and any pending messages affected by this event.

MESSAGE TEMPLATE

When the customer has made a partial payment

Replace every bracketed placeholder with checked details. This is reusable wording, not a software-variable specification.

Subject: [Amount] received toward invoice [number]

Hi [first name],

We've received your payment of [amount and currency] on [date] and applied it to invoice [number] for [service]. Thank you.

The remaining balance on this invoice is [amount and currency]. The next agreed payment is [amount], due [date or defined milestone].

Your receipt is available at [verified route]. If the payment or balance doesn't match your records, please contact [name or team] at [monitored route].

[Staff name]
[Business name]

Before sending: check the recipient, the current source record, the reply route and any pending messages affected by this event.

MESSAGE TEMPLATE

When payment is still processing

Replace every bracketed placeholder with checked details. This is reusable wording, not a software-variable specification.

Subject: Payment update for invoice [number]

Hi [first name],

Your payment of [amount and currency] for invoice [number] is currently showing as [accurate pending status]. We haven't recorded it as received yet.

[State the business's actual next check or the payment provider's verified instruction.]

If you have a question before then, contact [monitored route].

[Staff name]
[Business name]

Before sending: check the recipient, the current source record, the reply route and any pending messages affected by this event.

WORKSHEET 02

Quote follow-up record

Choose a reason for the next message and review the record first.

Client: _____ Owner: _____ Date: _____

1. Customer, recipient and quote reference

2. Current version and valid-until date

3. Date sent and delivery issue, if any

4. Last reply or decision

5. Open question or requested change

6. Next message purpose and agreed timing

7. Owner and monitored reply route

8. Stop/change condition and final disposition

Completion checks

- [ ] A document view is not treated as acceptance
- [ ] A reply or decline triggers review of pending actions
- [ ] An expired quote is reviewed before being offered again
- [ ] Scope changes follow the appropriate approval process

MESSAGE TEMPLATE

Confirm that the current quote reached the customer

Replace every bracketed placeholder with checked details. This is reusable wording, not a software-variable specification.

Subject: Your quote for [service]

Hi [first name],

I'm checking that you received quote [reference] for [brief service description], sent on [date]. You can review the current version here: [verified link].

Is there anything about the work, timing, or price you'd like us to clarify before you decide?

[Staff name]
[Business name]

Before sending: check the recipient, the current source record, the reply route and any pending messages affected by this event.

MESSAGE TEMPLATE

Resolve one missing detail

Replace every bracketed placeholder with checked details. This is reusable wording, not a software-variable specification.

Subject: One detail to confirm for [service]

Hi [first name],

To confirm [specific part of the quote], we still need [one detail]. Could you [simple action or question]?

Once we have that, we'll [actual next step]. The current quote is [reference or verified link].

Thanks,
[Staff name]

Before sending: check the recipient, the current source record, the reply route and any pending messages affected by this event.

MESSAGE TEMPLATE

Explain a revised quote

Replace every bracketed placeholder with checked details. This is reusable wording, not a software-variable specification.

Subject: Revised quote [reference] for [service]

Hi [first name],

We've updated the quote to reflect [requested change]. The revision changes [scope], [price, if changed], and [timing, if changed].

Please review version [identifier] here: [verified link]. It replaces the earlier proposal for this decision. If you'd like to proceed, [actual acceptance action].

Let [contact] know if any detail needs another look.

[Staff name]

Before sending: check the recipient, the current source record, the reply route and any pending messages affected by this event.

MESSAGE TEMPLATE

Close an unanswered inquiry politely

Replace every bracketed placeholder with checked details. This is reusable wording, not a software-variable specification.

Subject: Closing the loop on quote [reference]

Hi [first name],

We haven't heard back about [service], so we'll close this inquiry for now. [If accurate: The quote expires on [date].]

If you'd like to revisit it, reply here and we'll check the current scope, price, and availability with you.

Thank you,
[Staff name]

Before sending: check the recipient, the current source record, the reply route and any pending messages affected by this event.

WORKSHEET 03

Event and message worksheet

Use one record per service event to coordinate customer messages.

Client: _____ Owner: _____ Date: _____

1. Service stage and real trigger

2. Source record and current status

3. Recipient and communication route

4. Message purpose and checked details

5. Send owner or configured action

6. Timing and dependencies

7. Stop/change condition and manual fallback

8. Delivery/reply check and next owner

Completion checks

- [ ] Messages agree with the current booking/document/payment
- [ ] A queued or sent message is distinguished from delivery
- [ ] A reply or status change has a review route
- [ ] Conflicting or obsolete reminders are addressed

WORKSHEET 04

Cancellation policy decisions

Set operational rules before adapting customer-facing wording.

Client: _____ Owner: _____ Date: _____

1. Services covered and policy version

2. Notice period and time-zone reference

3. Online change/cancellation route

4. Fallback when the link fails or is unavailable

5. Status until a replacement is confirmed

6. Any fee/deposit rule and applicable review

7. Exceptions, accessibility and decision owner

8. Where customers see the terms and acknowledge them

Completion checks

- [ ] Policy wording matches actual settings
- [ ] A template does not create automatic fees or refunds
- [ ] Business-initiated changes have a clear process
- [ ] Staff apply and explain exceptions consistently

TEMPLATE TO ADAPT

Customer-facing policy wording

Complete the business decisions first. Have applicable fees, refund terms and legal requirements reviewed for the actual service.

Changing or canceling your appointment

If you need to cancel or reschedule your [appointment type], please use [verified route] or contact [monitored contact details].

We ask for [the business's approved notice period] before the scheduled start, using [time zone if relevant]. Online cancellation or rescheduling is available [actual conditions]. If the link is unavailable, contact us through [fallback route].

A request for a different time is confirmed when [actual confirmation process]. Until then, [accurate explanation of the original booking's status].

[Insert only the business's reviewed fee, deposit, refund, or no-show terms, if applicable, with their conditions and exceptions.]

If we need to change or cancel your appointment, we'll contact you through [actual route] to explain the available next steps under [relevant service terms].

For questions or circumstances that need review, contact [responsible team or person].

WORKSHEET 05

Reschedule record and send check

Keep a request, an acknowledgment and a confirmed replacement distinct.

Client: _____ Owner: _____ Date: _____

1. Customer and appointment reference

2. Original date, time, zone and status

3. Reason appropriate to share

4. Checked alternatives or requested time

5. Replacement date, time, zone and status

6. Staff, location/joining link and preparation

7. Old calendar/reminder checks

8. Confirmed message, owner and fallback

Completion checks

- [ ] Options are not presented as confirmed reservations
- [ ] The original booking's status is explicit
- [ ] Obsolete reminders and events are checked
- [ ] The customer has one current set of details

MESSAGE TEMPLATE

When the business needs to request a change

Replace every bracketed placeholder with checked details. This is reusable wording, not a software-variable specification.

Subject: Request to reschedule your [service] appointment

Hi [first name],

We need to change your [service] appointment currently scheduled for [original date, time, and time zone] because [brief appropriate reason]. I'm sorry for the disruption.

We can offer [option one] or [option two], subject to confirmation, or you can [verified route to available alternatives]. Please let us know which works for you.

Your original appointment is currently [accurate status and what that means]. We'll confirm the replacement once [actual booking step].

If neither option works, contact [monitored route] so we can discuss the next step.

[Staff name]
[Business name]

Before sending: check the recipient, the current source record, the reply route and any pending messages affected by this event.

MESSAGE TEMPLATE

When acknowledging the customer's request

Replace every bracketed placeholder with checked details. This is reusable wording, not a software-variable specification.

Subject: Your request to change [service] on [original date]

Hi [first name],

We've received your request to move the appointment currently listed for [original date, time, and time zone].

[Staff member or team] will check [requested alternative or availability] and confirm the next step through [actual route]. Your booking currently shows [accurate status].

If your availability changes before we reply, please contact [monitored route].

[Staff name]

Before sending: check the recipient, the current source record, the reply route and any pending messages affected by this event.

MESSAGE TEMPLATE

When the new appointment is confirmed

Replace every bracketed placeholder with checked details. This is reusable wording, not a software-variable specification.

Subject: New appointment confirmed: [service] on [new date]

Hi [first name],

Your [service] appointment has been moved from [original date, time, and time zone] to:

Date and time: [new date, time, and time zone]
Location or joining link: [verified details]
Appointment reference: [actual reference]

[State any preparation details that changed, or link to the current instructions.]

This replaces the original appointment. If you need another change, use [verified route] or contact [monitored contact details], subject to [relevant policy reference].

[Staff name]
[Business name]

Before sending: check the recipient, the current source record, the reply route and any pending messages affected by this event.