CLIENT WELCOME GUIDE

Yepez Signature Landscape

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Applies to: all maintenance and project clients of Yepez Signature Landscape, LLC.

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Thank you for choosing YSL. This guide walks you through everything you need to get the most out of our services—from your online Client Hub to what to expect on service day. Keep it handy; it's also available at **yepezlandscapetx.com**.

1. What to expect

Whether you're signing up for recurring maintenance or a one-time project, here's what our standard process looks like:

STEP	MAINTENANCE CLIENTS	PROJECT CLIENTS
Consultation	Residential properties under 5 acres are quoted from the photos on your request form. Properties over 5 acres, complex in scope, and/or commercial include an in-person consultation.	In-person meeting to discuss project scope, design ideas, budget range, and timeline.
Quote	You'll receive a quote in Client Hub (see below) with service details and visit frequency.	A detailed quote with scope of work, materials, and estimated timeline—sent to your Client Hub for review.
Approval	Review and e-sign your quote in Client Hub. All quotes require a signature before work begins.	Review and e-sign your quote—all quotes require a signature. A **50% deposit is required to book your project**; the remaining 50% is due upon completion.
Card on file	Before your first service, you'll receive an email to add a card on file. **A card on file is required for all clients** and is stored securely (encrypted) in your Client Hub Wallet. (Section 5)	
Scheduling	We assign a regular visit day with a standard 2-hour arrival window. You'll see every upcoming appointment in Client Hub.	Your project is scheduled based on current project timelines. Expect a 2–4 week start date from approval; we'll communicate an exact start date.
Service day	Our crew arrives during your scheduled window. You'll receive an automated "on the way" reminder 5–60 minutes beforehand.	We install per the approved scope. Any changes to the scope are subject to a change order. At completion, you'll receive the Plant Care Guidelines (for landscape projects).

2. Your Client Hub

Client Hub is your all-in-one online portal—no app to download, no password to remember. You'll access it through links in the emails and texts we send you.

How to log in

1. Click any link in an email or text from us (quote, invoice, appointment reminder, etc.).
2. If it's been a while, you'll verify your identity with your email or phone number—no password needed.
3. You're in. Navigate using the tabs at the top: **Requests**, **Quotes**, **Appointments**, **Invoices**, and **Wallet**.

You can also go directly to your Client Hub anytime: **Client Hub Login**

What you can do in Client Hub

📋 Quotes

View quotes, e-sign to approve, or request changes. If a deposit is required, you can pay it right there. All quotes require a signature before work begins.

📅 Appointments

See your next five upcoming visits at a glance (date, time, arrival window, and which crew member is assigned). Your full appointment history is also available—click **Show More** to view past visits.

📩 Requests

Need additional work? Submit a new service request directly from Client Hub—no phone call needed. The request form is also available on our website.

$ Invoices & payments

View and pay invoices online by credit card, debit card, or bank transfer (ACH). Set up **autopay** for hands-free billing, or pay each invoice manually—your choice.

💳 Wallet

A card on file is required before service begins. You can also set a default payment method, add new cards, or remove old ones anytime.

📄 Documents & history

Download PDF copies of any quote, invoice, or payment receipt. Your full financial and service history is available in Client Hub for reference.

3. Our services

YSL is a full outdoor service company. Here's what we offer:

Maintenance

- Complete lawn care (mow, edge, blow)
- Fertilization programs
- Shrub & hedge pruning
- Flower bed maintenance
- Seasonal cleanups

Project-based work

- **Landscape:** installations, tree work, flower beds
- **Hardscape:** retaining walls, stonework, concrete pads & patios
- **Structures & fabrication:** fencing, metal buildings, custom metalwork
- **Outdoor living & site work:** outdoor living spaces, junk removal

📐 3D project design

Every landscape project includes our essential 3D design process—3D snapshots, a 3D movie walk-through, and a 2D layout. Each deliverable appears as a separate line item in your quote. See Section 7 for the full project timeline.

Request service

New or returning clients can request service at any time. Fill out the short form with your contact information, property address, and a description of the work you need. We'll follow up within 2 business days.

- **From our website:** Visit **yepezlandscapetx.com** and fill out the service request form.
- **From Client Hub:** Log in to your Client Hub and click **New Request** to submit directly from your portal.

4. Communication & notifications

We use automated texts and emails so you're never left wondering. Here's what to expect:

Notification	When it's sent	How
Request confirmation	Sent immediately after you submit a service request, confirming our team has received it. We'll follow up within 2 business days.	Email
Card on file request	Before your first service (required)	Email
New quote	After we respond to your request or complete a consultation. Maintenance: within 1 business day. Projects: 1–7 business days based on complexity.	Email & text
Appointment reminder	Sent the day before each scheduled visit at 5:00 PM CT	Email & text
On-my-way notification	Sent when our crew departs for your property. The notification is sent between 5 and 60 minutes before arrival depending on drive time.	Text
Invoice	Created and sent when a job is completed	Email & text
Invoice reminder	Sent for invoices awaiting payment or overdue	Email & text
Feedback survey	Sent after a project is completed (Google Form for feedback & review)	Email

Two-way texting: You can reply to any of our text messages—messages and emails are received directly by Jose Yepez. No separate number to save.

💬 AI Receptionist — 24/7 support

Our AI-powered receptionist is available around the clock to assist you when we're unavailable. It can:

- **Answer questions** about our services, hours, and pricing
- **Schedule & reschedule** appointments directly on our calendar
- **Submit service requests** on your behalf
- **Take messages** and escalate urgent matters to our team

Call or text anytime: (903) 225-1660

5. Payments & billing

Accepted methods: Credit or debit card (pay online through Client Hub), bank transfer/ACH (lower processing fees), or check (payable to Yepez Signature Landscape, LLC).

Billing: Maintenance invoices are sent after each service visit (or monthly, depending on your agreement). Project invoices: 50% deposit before work begins, remaining 50% due upon completion.

6. Working together

📧 Scheduling changes

Need to skip a visit, reschedule, or adjust your service? Here's how to reach us:

- **Email (fastest):** jose@yepezlandscapetx.com
- **AI Receptionist:** Call or text (903) 225-1660
- **Client Hub:** Submit a request directly from your portal

☀️ Seasonal adjustments

We'll provide recommendations for weekly service during the growing season (spring–fall) and a decrease in frequency during winter to biweekly, if requested.

🏡 Property details — let us know

To ensure smooth service every visit, please update us during onboarding or whenever changes occur:

- **Access:** Gate codes, keys, or lock combinations
- **Pets:** Animals that may be in the yard during service
- **Debris:** Items to be cleared before our crew arrives
- **Irrigation:** Sprinkler schedules that may interfere with service
- **Other:** Anything that makes service access difficult

7. For project clients

How a project works, start to finish

1. **In-person consultation:** We meet at your property to discuss your vision, budget, and timeline.
2. **Design (~1 week):** We create a custom design package. Deliverables include 3D snapshots, a 3D movie walk-through, and a 2D layout—each appears as a separate line item in your quote.
3. **Revisions:** Review the design and request any changes. We'll revise until you're happy with the plan.
4. **Final quote (~1 week after design approval):** Once the design is approved, we finalize the detailed project quote with scope, materials, and timeline.
5. **Approval & deposit:** E-sign the quote and pay a **50% deposit** to reserve your spot on our schedule. The remaining 50% is due upon project completion.
6. **Installation:** Our crew completes the work per the approved scope. We'll keep you updated on progress.
7. **Walk-through & handoff:** We walk the finished project with you and collect the final balance.
8. **Follow-up:** We check in after installation to make sure everything is thriving.

Key documents

Document	What it covers	Where to find it
Project Contract & Disclaimer	Scope of work, payment terms, warranties, and limitations of liability.	Attached to your quote
Plant Care Guidelines	Comprehensive care instructions for your new plants—watering, pruning, feeding, and seasonal care.	yepezlandscapetx.com
Quick-Start Card	A printable 2-page summary of the Plant Care Guidelines for quick daily reference.	yepezlandscapetx.com

8. Contact & support

We're here to help. For general questions, scheduling changes, or service requests, the fastest options are **Client Hub** or **email**.

Phone	**(903) 408-0674**
Email	**jose@yepezlandscapetx.com**
AI Receptionist	**Call or text (903) 225-1660 — available 24/7**
Client Hub	**Client Hub Login**
Website	**yepezlandscapetx.com**

Scan to visit yepezlandscapetx.com

For **warranty claims** on installed plants, please report the issue **in writing within 7 days** of noticing it. Include a photo and your watering schedule. Details are in your Plant Care Guidelines.

Quick-reference checklist

- ✅ **Log in to Client Hub** — bookmark it for quick access (§2)
- ✅ **Add a card on file** — required before first service (§5)
- ✅ **Review and e-sign your quote** — work cannot begin without a signature (§1)
- ✅ **Share property details** — gate codes, pets, irrigation, access info (§6)
- ✅ **Save our contact info** — email and AI Receptionist at (903) 225-1660 (§8)
- ✅ **Submit requests online** — Client Hub or website for fastest response (§3)

This guide is a quick reference for getting started. For plant care questions after a landscape installation, refer to the Plant Care Guidelines at yepezlandscapetx.com. For warranty and legal details, refer to your Project Contract & Disclaimer.