The Blueprint for a Perfect Visit: Your 8-Step Daily Workflow

Everything for a visit lives in the Visit app on your phone — and the certificate goes to Dylan from your phone. Eight steps, in order, every job, before you leave the site.

PHASE 1 — BEFORE WORK

BEFORE ANY WORK STARTS

01 — Start visit — in AC Visit

Read the job before you leave home — services, opening time, every line of the **work order** — and load the truck for every service. On site: open **AC Visit**, find the store, tap your name, tick the **six commitments**, sign, then tap **Start visit** before you touch anything.

PHASE 2 — THE WORK & PHOTO PROTOCOL

EVERY SERVICE

02 — Before and after photos — in the app

On the service's card: **Before** → the **dirtiest areas**. Do the work, let it dry. Same spot, same angle, same distance → **After**. The card turns green with both. Every service. Photos never go in the certificate.

FINISHED?

03 — Quick walkthrough and pack-up

Walk the site while you pack up: **water off**, hoses and equipment loaded, **pylons and wet floor signs picked up**, no debris or standing water, doors and gates secured. Then find the **site contact**.

PHASE 3 — THE RECORD — THE CERTIFICATE

THE RECORD

04 — Digital Proof Certificate

In AC Visit: **Next: certificate** → **Open the certificate**. **Find the store by number** — it fills in. Add the crew, the site contact and the **work order number**. **One line per service** — area and standard note; never list a service twice. Couldn't finish? Tick **NOT completed**, call Dylan, email Bria. **You sign, the site contact signs.**

SEND IT

05 — Send certificate

Tap **Review & send**, then **Send certificate**. Wait for the green **"Sent to Dylan"** line, back to AC Visit — **received ✓** — then **text Dylan**. Nothing to upload: it's filed to the job by itself. No signal? Send again from the truck.

PHASE 4 — CLOSE OUT

REPORT

06 — The finish questions

In AC Visit, **Next: finish**. Six quick questions: bin pull, site condition, packed up, walkthrough, what the store asked for, damage or access — plus notes for the office. Every "see notes" gets a line in the notes. Sign.

CLOSE IT

07 — Finish visit

Tap the green **Finish visit**. That's your end time — the office gets your checklists and the visit summary. Keep the app open until it says everything has been sent.

LAST

08 — Then leave

Not before every step above is done. A certificate sent from home is a late certificate. Could not do the visit at all? Call Dylan, and still send a certificate — no services, tick NOT completed, give the reason.

Why the exact order matters

The start and finish checks show the site was safe when you started and finished when you left. **The before and after photos** prove each service. **The certificate** — signed by you and the site contact, sent to Dylan — is the record PFG sees. Skip one step and the visit can't be verified — **only verified visits count toward your 100% month**.

Need support?

ANYTHING AT ALL — STUCK, CAN'T FINISH, LATE, DAMAGE, APP WON'T WORK
Dylan first: 226-577-2299 (call or text) · the WhatsApp group

DYLAN NOT ANSWERING?
Office 1-604-789-1256, then Shawn or Bria — until you reach someone

EMERGENCY — INJURY, FIRE, COLLISION
911 first, then head office or Shawn; no answer, Dylan

SCHEDULES & RESCHEDULES
Come from Bria — tell Dylan first if you need a change

Always Clean MAINTENANCE