DEMO • NOT FOR SALE

Client preferences

Use this page to record the client's preferences before the first visit.

Client or household name

Priority rooms and surfaces

Areas to skip

Pets and access arrangements

Product preferences or sensitivities

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First visit checklist

□ Confirm the agreed priorities and rooms.

□ Confirm pet and access arrangements.

□ Record any changes to the agreed scope.

□ Agree on how to share follow-up notes.

Follow-up notes