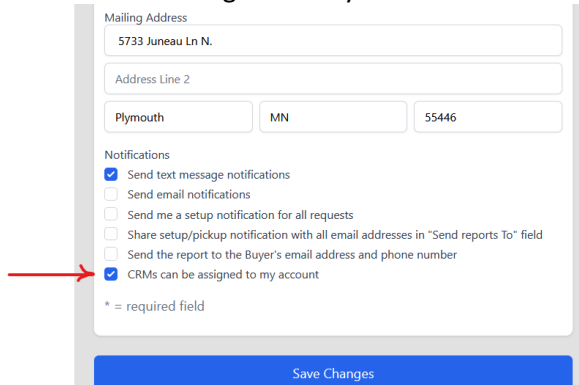


Chain of Custody User Requirements

These practices must be followed for an accurate Chain of Custody record.

- 1) "CRMs can be assigned to my account" must be enabled in all technician's contact settings



Mailing Address
5733 Juneau Ln N.
Address Line 2
Plymouth MN 55446

Notifications

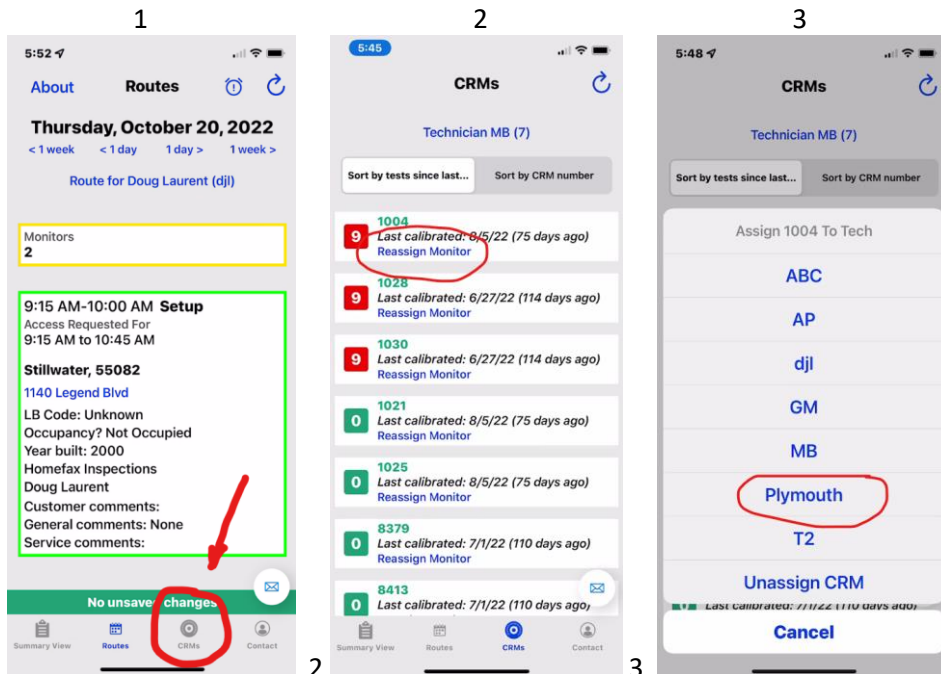
- Send text message notifications
- Send email notifications
- Send me a setup notification for all requests
- Share setup/pickup notification with all email addresses in "Send reports To" field
- Send the report to the Buyer's email address and phone number
- CRMs can be assigned to my account

* = required field

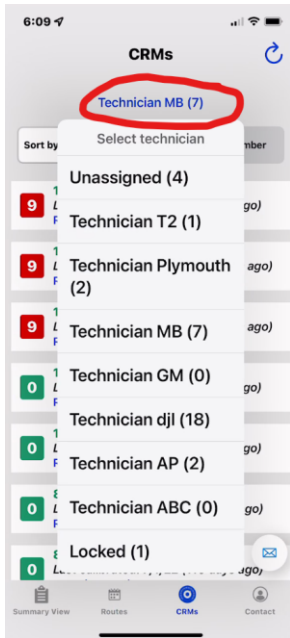
Save Changes

- 2) Technicians must manually reassign CRMS when:
 - a. Picking up or dropping off at the office or other storage facility
 - b. Trading CRMs with other technicians.

This is done through the phone app Link.



- 3) Select Technician at the top and a roll down displays all techs and the number of crms assigned to them



- 4) "Unassigned" is used for office
- 5) A new technician can be created if there are more than one office or storage facility. The technicians name can be the name of the location i.e. Plymouth Office.
 - a. Set Location Initials as Location (i.e. Plymouth) and make sure that Radon is **NOT** selected.

Technician (Username: Plymouth)

Basic Information

Plymouth Office

(612) 875-3017

doug@tstoday.net

Separate multiple addresses with a semicolon: test@example.com; john@example.com; etc.

Technician Name

Plymouth

Assigned To Services

Radon Water Sewer Chimney Intrusive Moisture Mold Testing

Aerial Roof Inspection

- b. Under "Notifications", select "CRMs can be assigned to my account. Leave other boxes unchecked

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Share setup/pickup notification with all email addresses in "Send reports To" field

Send the report to the Buyer's email address and phone number

CRMs can be assigned to my account

* = required field

Save Changes