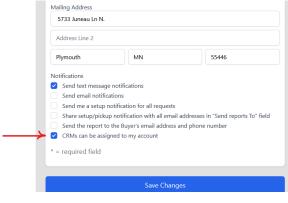
## **Chain of Custody User Requirements**

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

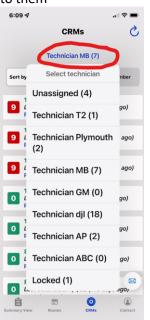


- 2) Technicians must manually reassign CRMS when:
  - a. Picking up or dropping off at the office or other storage facility
  - b. Trading CRMs with other technicians.

This is done through the phone app Link.

1	2	3
5:52 A 🗢 🖿	<b>5:45</b> all <b>≎</b> ■	5:48 🔊 🗢 🖿
About Routes 🛈 🖒	CRMs 🖒	CRMs 💍
Thursday, October 20, 2022	Technician MB (7)	Technician MB (7)
Route for Doug Laurent (djl)	Sort by tests since last Sort by CRM number	Sort by tests since last Sort by CRM number
Monitors 2	9 Last calibrated: 8/5/22 (75 days ago) Reassign Monitor	Assign 1004 To Tech
	1028	ABC
9:15 AM-10:00 AM Setup Access Requested For	9 Last calibrated: 6/27/22 (114 days ago) Reassign Monitor	AP
9:15 AM to 10:45 AM Stillwater, 55082	9 Last calibrated: 6/27/22 (114 days ago) Reassign Monitor	dji
1140 Legend Blvd LB Code: Unknown	0 1021 Last calibrated: 8/5/22 (75 days ago)	GM
Occupancy? Not Occupied Year built: 2000 Homefax Inspections	Reassign Monitor	MB
Doug Laurent Customer comments:	Last calibrated: 8/5/22 (75 days ago) Reassign Monitor	Plymouth
General comments: None Service comments:	0 8379 Last calibrated: 7/1/22 (110 days ago) Reassign Monitor	T2
No unsaver changes	8413 🖂 Last calibrated: 7/1/22 (110 days ago,	
Summary View Routes CRMs Contact	Summary View Routes CRMs Contact	Cancel
2	3	

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.

isic Information		
Plymouth		Office
(612) 875-3017		
doug@itstoday.net		
parate multiple addresse	s with a semicolon: test(	@example.com; john@example.com; etc.
dhi n-s-croin		
Plymouth		

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

Address Line 2				
Plymouth	MN	55446		
lotifications				
Send text message	ge notifications			
Send email notifi	cations			
Send me a setup	notification for all reques	ts		
Share setup/pick	up notification with all em	nail addresses in "Send reports To" field		
	o the Buyer's email addre	ss and phone number		
Send the report t				
	igned to my account			
CRMs can be ass	igned to my account			
CRMs can be ass	igned to my account			
	igned to my account			