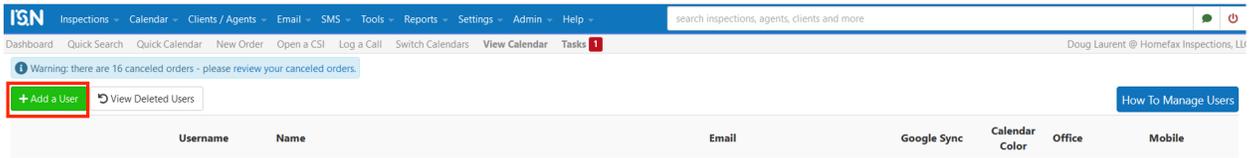




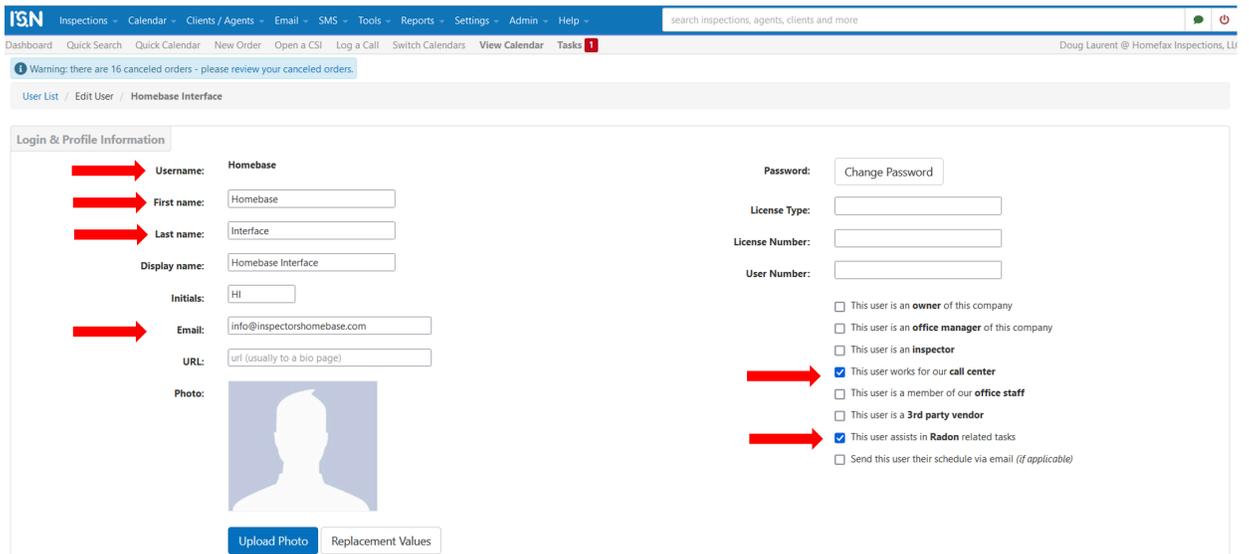
ISN Integration Instructions (Last updated: September 30, 2022)

Add ISN User to be used for Homebase Integration:

1. Due to ISN API limitations, we require a username and password to integrate Homebase with ISN. We recommend creating a new ISN user with limited privileges instead of using your main ISN username and password. Please make sure the new user you create has the username “Homebase”, can add notes to orders, and can create radon appointments.
2. Admin>User Administration>



3. Enter user information and permissions



4. Scroll down to permissions - Select as shown below

The screenshot shows the ISN user settings page. The navigation bar includes: ISN, Inspections, Calendar, Clients / Agents, Email, SMS, Tools, Reports, Settings, Admin, Help, and a search bar for inspections, agents, clients and more. The main menu includes: Dashboard, Quick Search, Quick Calendar, New Order, Open a CSI, Log a Call, Switch Calendars, View Calendar, and Tasks (1). The permissions section is expanded to show the following options:

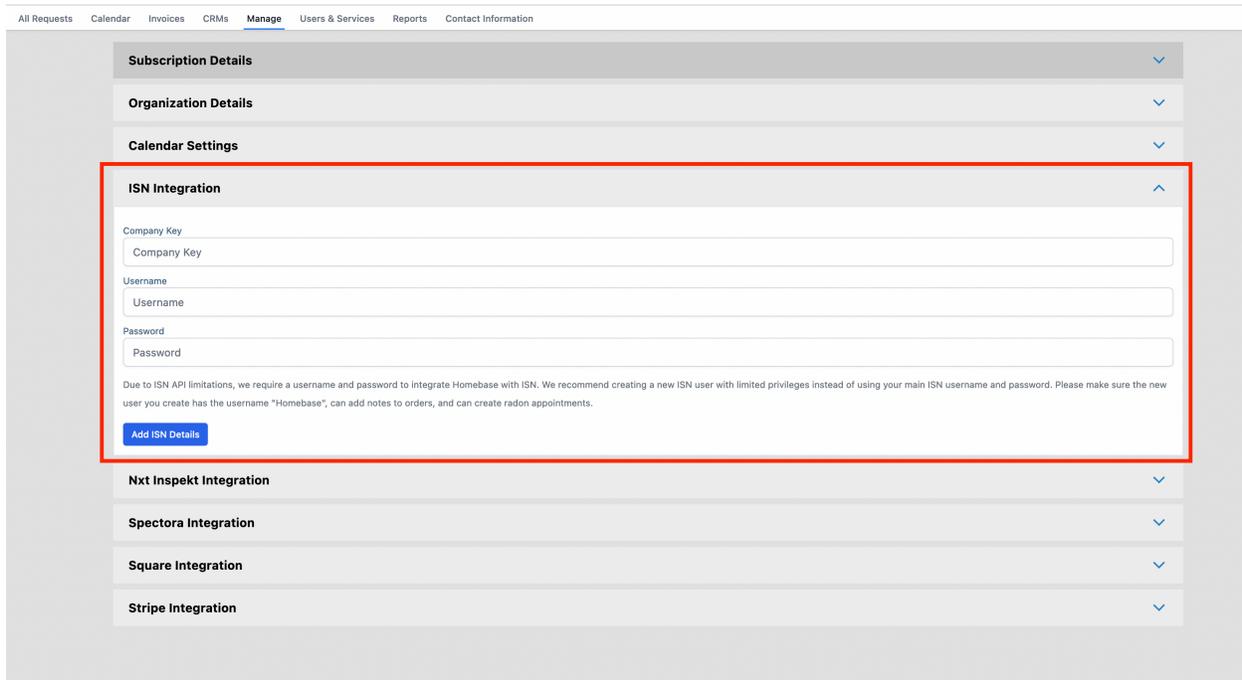
- Account Enabled
 - Manually Complete Inspections
 - Upload Order Attachments
 - User Administrator
 - Access to the Company Log
 - Access to Business Reporting
 - Access to Client, Agent and Contact lists
- Office Administrator
 - Edit Inspections
 - Edit Completed Inspections
 - Edit Unscheduled Inspections
 - Delete Inspections
 - Delete Unscheduled Inspections
 - Remove taxes from inspection fees
 - Undelete Clients, Agents or Agencies
 - Create Inspections
- Company Calendar Access
 - Can edit availability slots on My Online Schedule page
 - Can block days on My Online Schedule page
 - View All Inspections regardless of Owner(s)
 - Manually mark an Order as Signed
 - Upload/Download Client List
 - Upload/Download Agent List
 - Marketing System Access
 - Remove Signed Agreements

5. Save

The screenshot shows the 'Owner Access' section of the user settings page. It includes a checkbox for 'Owner Access' and a link that says 'Looking for more? Add the privilege above to add additional privileges for this user'. At the bottom, there are two buttons: 'Save changes' and 'Cancel, return to list of users'.

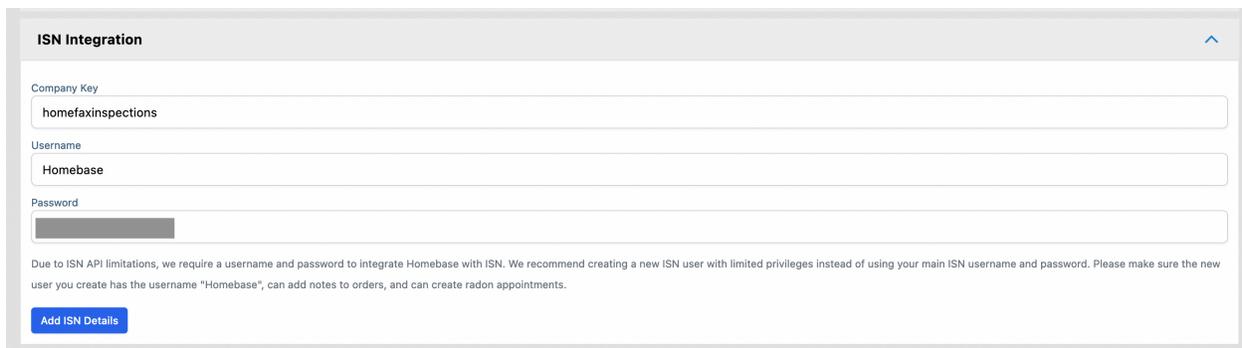
Both types of ISN integration import orders automatically from ISN into Homebase after you complete these instructions.

1. In Homebase, navigate to the Manage screen and find the “ISN Integration” section.



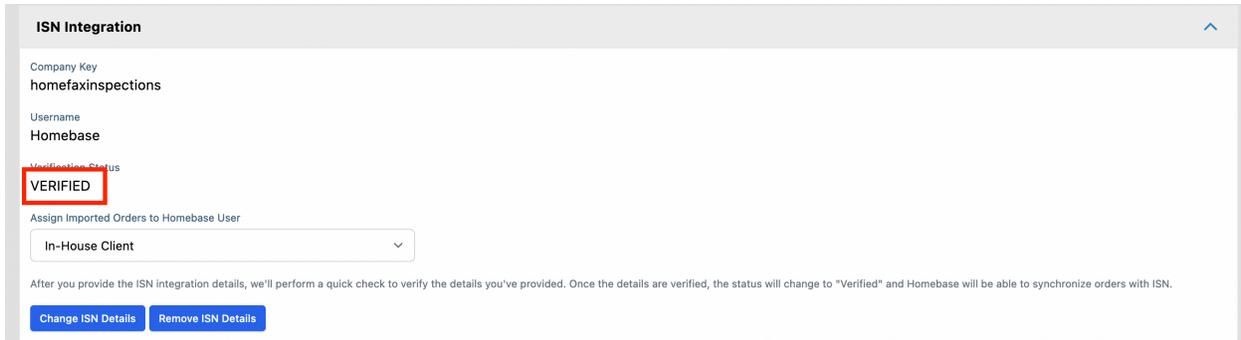
The screenshot shows the Homebase Manage screen with a navigation bar at the top containing: All Requests, Calendar, Invoices, CRMs, **Manage**, Users & Services, Reports, and Contact Information. Below the navigation bar is a list of settings sections: Subscription Details, Organization Details, Calendar Settings, **ISN Integration** (highlighted with a red box), Nxt Inspekt Integration, Spector Integration, Square Integration, and Stripe Integration. The ISN Integration section contains the following fields: Company Key, Username, and Password. Below these fields is a note: "Due to ISN API limitations, we require a username and password to integrate Homebase with ISN. We recommend creating a new ISN user with limited privileges instead of using your main ISN username and password. Please make sure the new user you create has the username 'Homebase', can add notes to orders, and can create radon appointments." At the bottom of the section is a blue button labeled "Add ISN Details".

2. Enter your ISN company key along with the username and password of the ISN user you'd like Homebase to use for the integration. These credentials will be used to add notes and/or radon appointments in ISN on your behalf, depending on the integration version you use. We recommend creating a new ISN user with username “Homebase”.

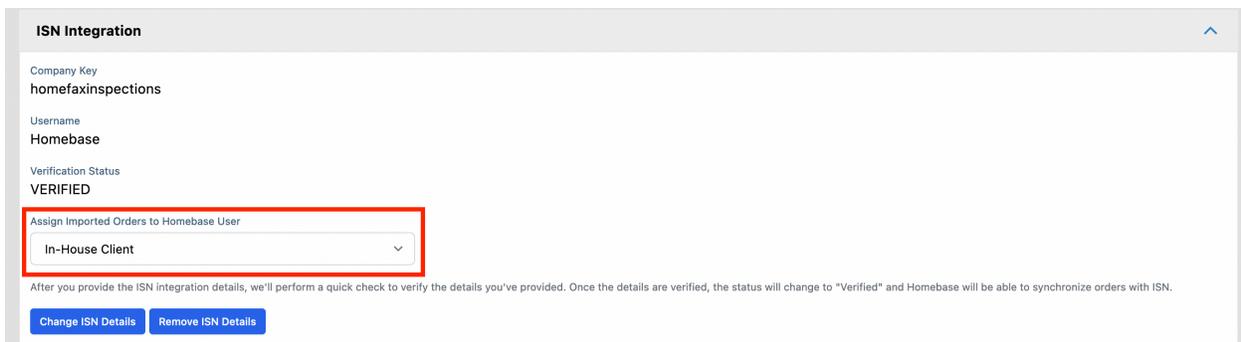


The screenshot shows the ISN Integration form with the following values entered: Company Key: homefaxinspections, Username: Homebase, and Password: [REDACTED]. The same note from the previous screenshot is present below the fields, and the "Add ISN Details" button is at the bottom.

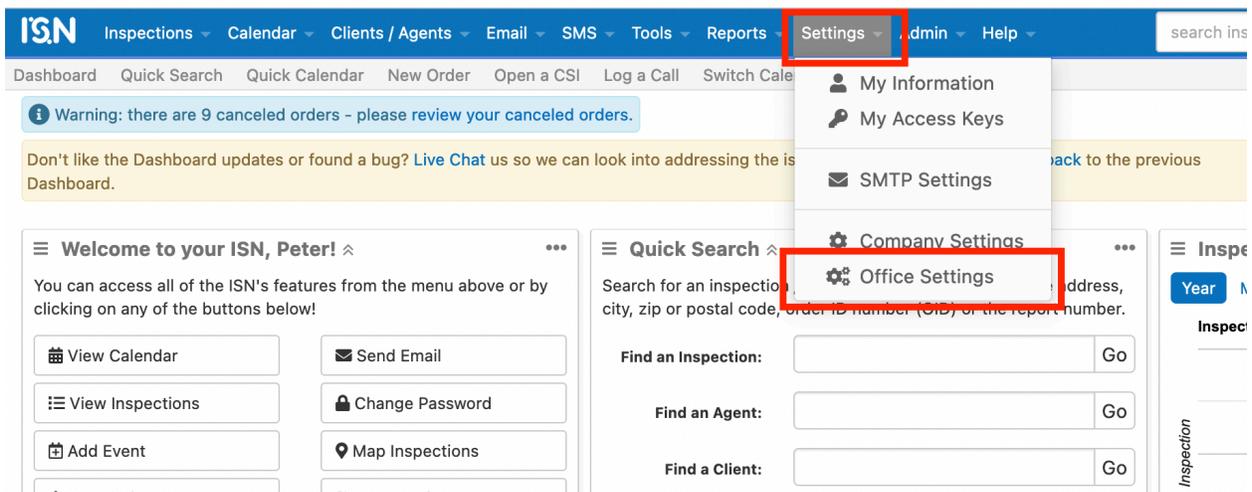
3. Click “Add ISN Details” and wait a few moments for the Verification Status to change from PENDING to VERIFIED. If Homebase is unable to verify your credentials, please click the “Retry Verification” button or double check the credentials you’ve entered. If you continue to have problems with this step, please reach out to support@inspectorshomebase.com.



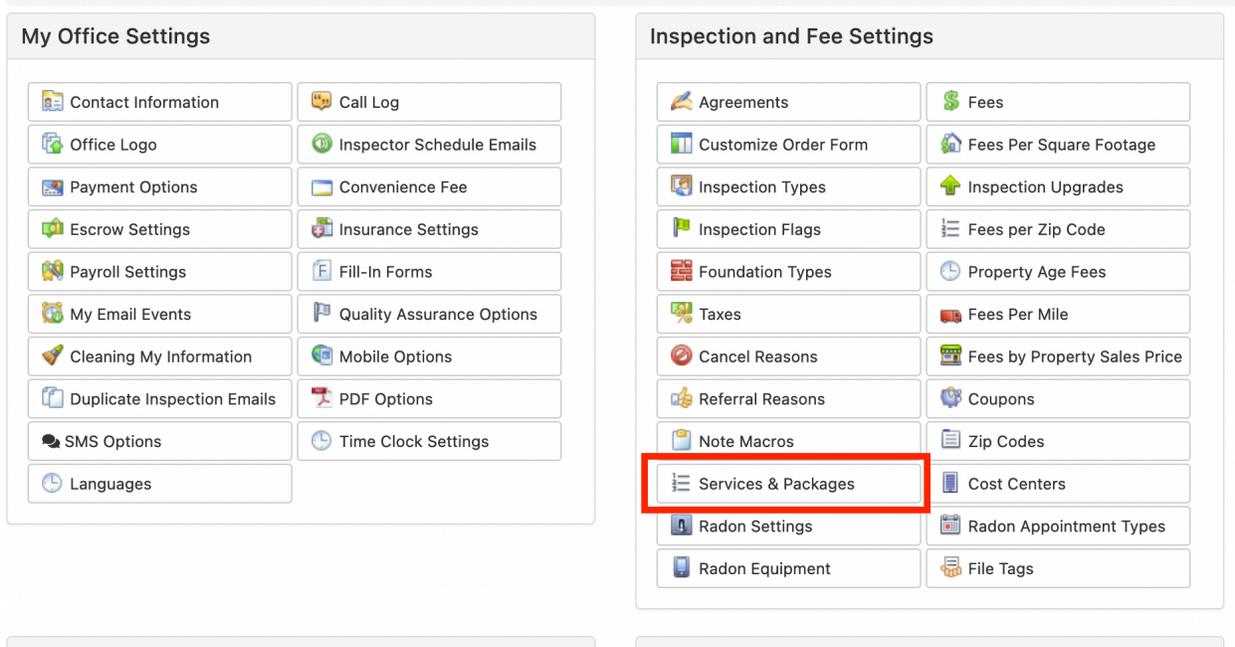
4. By default, imported ISN orders are assigned to a special In-House Client where all fees are set to 0. If you’d like to assign imported ISN orders to a different Homebase user, you can select that user with the provided dropdown.



5. Sign in to ISN and navigate to the “Settings” -> “Office Settings” screen



6. Select the “Services & Packages” option in the “Inspection and Fee Settings” section



7. Add the services you offer from the list below with type “Ancillary Service”. Please make sure that the name of each service you add matches what is displayed here, otherwise Homebase may not be able to detect when that service is enabled.

Radon ISN Services

Type	Name	Public Name	Inspection Type
Ancillary Service	Radon Gas Testing	Radon Gas Testing	— none —

Sewer ISN Services

Type	Name	Public Name	Inspection Type
Ancillary Service	Sewer Line Camera Inspection	Sewer Line Camera Inspection	— none —
Ancillary Service	Sewer Re-Inspection		— none —
Ancillary Service	Sewer Pull Toilet (Add to either of the above)		— none —

Chimney ISN Services

Type	Name	Public Name	Inspection Type
Ancillary Service	Chimney 1 Fireplace	Chimney Inspection with Camera	— none —
Ancillary Service	Chimney 2 Fireplace		— none —
Ancillary Service	Chimney 3 Fireplace		— none —
Ancillary Service	Chimney 4 Fireplace		— none —
Ancillary Service	Chimney 5 Fireplace		— none —

Water ISN Services

Type	Name	Public Name	Inspection Type
Ancillary Service	Water Test - add any of the following as needed	Water Quality Testing	— none —
Ancillary Service	Water - Arsenic		— none —
Ancillary Service	Water - Lead		— none —
Ancillary Service	Water - Manganese		— none —
Ancillary Service	Water - Cadmium		— none —
Ancillary Service	Water - Chromium		— none —
Ancillary Service	Water - Copper		— none —
Ancillary Service	Water - Iron		— none —

Wood Foundation ISN Services

Type	Name	Public Name	Inspection Type
Ancillary Service	Wood Foundation		— none —

Intrusive Moisture ISN Services

Type	Name	Public Name	Inspection Type
Ancillary Service	Intrusive Moisture 1 Wall		— none —
Ancillary Service	Intrusive Moisture Entire Home		— none —
Ancillary Service	Intrusive Moisture Entire Home over 3,000 sq ft		— none —

Mold ISN Services

Type	Name	Public Name	Inspection Type
Ancillary Service	Mold w/Inspection		— none —
Ancillary Service	Mold w/o Inspection		— none —
Ancillary Service	Mold Post Remediation		— none —
Ancillary Service	1 Additional Mold Sample		— none —
Ancillary Service	2 Additional Mold Samples		— none —
Ancillary Service	3 Additional Mold Samples		— none —
Ancillary Service	4 Additional Mold Samples		— none —

8. Once you've added the services you offer, return to the "Office Settings" screen and select "Customize Order Form".

My Office Settings

- Contact Information
- Office Logo
- Payment Options
- Escrow Settings
- Payroll Settings
- My Email Events
- Cleaning My Information
- Duplicate Inspection Emails
- SMS Options
- Languages
- Call Log
- Inspector Schedule Emails
- Convenience Fee
- Insurance Settings
- Fill-In Forms
- Quality Assurance Options
- Mobile Options
- PDF Options
- Time Clock Settings

Inspection and Fee Settings

- Agreements
- Customize Order Form**
- Inspection Types
- Inspection Flags
- Foundation Types
- Taxes
- Cancel Reasons
- Referral Reasons
- Note Macros
- Services & Packages
- Radon Settings
- Radon Equipment
- Fees
- Fees Per Square Footage
- Inspection Upgrades
- Fees per Zip Code
- Property Age Fees
- Fees Per Mile
- Fees by Property Sales Price
- Coupons
- Zip Codes
- Cost Centers
- Radon Appointment Types
- File Tags

9. Add a new section to the Order Form with name and description set to “Additional Services”

ISN Inspections Calendar Clients / Agents Email SMS Tools Reports Settings Admin Help

Dashboard Quick Search Quick Calendar New Order Open a CSI Log a Call Switch Calendars View Calendar Tasks

Warning: there are 9 canceled orders - please review your canceled orders.

Home / Office Settings / Order Form Sections

+ Add Section

	Section Name	Section Description	Order Controls active in this Section
	Client	Client Information and Contact Information	Client - Client
	Subject Property	Subject Property Location & Information	Subject Property - SubjectProperty MajorCrossStreets - TextBox

10. Edit the new section then click “Add a Control”

Additional Services Additional Services Additional Services - OrderServices Radon Requested Start Date (Only if you have special requirements)

ISN Inspections Calendar Clients / Agents Email SMS Tools Reports Settings Admin Help

Dashboard Quick Search Quick Calendar New Order Open a CSI Log a Call Switch Calendars View Calendar Tasks

Warning: there are 9 canceled orders - please review your canceled orders.

Home / Office Settings / Order Form Sections / Order Controls in 'Additional Services'

+ Add a Control

11. Choose Type “Services” and use “Additional Services” for the Name and Description”

The screenshot shows the 'Edit a Control' interface for 'Additional Services'. At the top, there is a navigation bar with 'ISN' and various menu items like 'Inspections', 'Calendar', 'Clients / Agents', etc. Below the navigation bar, there is a warning message: 'Warning: there are 9 canceled orders - please review your canceled orders.' The main content area shows the control configuration for 'Additional Services'. It includes checkboxes for 'Basic Inspection' (checked), 'Radon', and 'Termite'. A dropdown menu labeled 'Move order control to another section' is set to 'Additional Services'. There is an orange 'Move Control' button. Below this, there are input fields for 'Type' (set to 'Services'), 'Name' (set to 'Additional Services'), and 'Description' (set to 'Additional Services'). A blue 'Update Control' button is at the bottom. The footer contains copyright information: '@ 2022 Inspection Support LLC', 'ISN Build 713R', 'Questions?', and 'Want a Faster ISN?'.

12. Once you’ve saved the new Control, Homebase will be able to automatically detect which services should be enabled when importing from ISN, along with certain configuration details like selected water test types and number of mold samples.

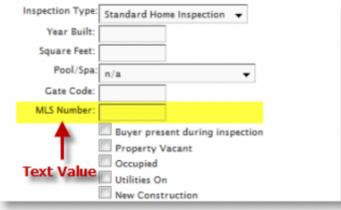
Optional ISN Integration Instructions: Import MLS Number and Contingency Date from ISN to Homebase

1. If you want to import the MLS Number from ISN to Homebase, return to the “Customize Order Form” screen and edit the “Property Info” section.

The screenshot shows the 'Order Form Sections' management screen. At the top, there is a navigation bar with 'Home / Office Settings / Order Form Sections' and a green '+ Add Section' button. Below this is a table with columns: 'Section Name', 'Section Description', and 'Order Controls active in this Section'. The table lists three sections: 'Client', 'Subject Property', and 'Property Info'. The 'Property Info' section is highlighted with a red box around its 'Controls' icon. The 'Property Info' section description is 'Information about the Subject Property'. The 'Order Controls active in this Section' for 'Property Info' include: 'Contingency End Date - Date', 'InspectionType - OrderType', 'Home Type - DropDown', 'Is this home', 'Foundation Type - FoundationType', 'Alarm - Alarm', 'Gate Code - TextBox', 'Lockbox Code - TextBox', and 'Referral Reasons - ReferReason'.

Section Name	Section Description	Order Controls active in this Section
Client	Client Information and Contact Information	Client - Client
Subject Property	Subject Property Location & Information	Subject Property - SubjectProperty, MajorCrossStreets - TextBox, Weather at time of inspection -
Property Info	Information about the Subject Property	Contingency End Date - Date, InspectionType - OrderType, Home Type - DropDown, Is this home, Foundation Type - FoundationType, Alarm - Alarm, Gate Code - TextBox, Lockbox Code - TextBox, Referral Reasons - ReferReason

- Click the “Add a Control” button and add a new Text Box type control with name, description, text value, and public name all set to “MLS Number”. Set the length to 10 characters and save the new control.



Move order control to another section

Property Info

Move Control

Type Text Box

Name MLS Number

Description MLS Number

Text Value MLS Number
This is the label shown in the Order Form

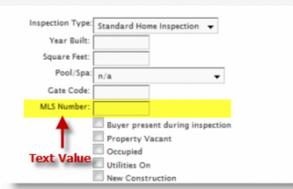
Public Name MLS Number
This is the label shown in the Online Scheduler

Length 10 characters

Update Control

- If you want to import the contingency date from ISN to Homebase, add another Text Box type control to the “Property Info” section with name, description, text value, and public name all set to “Contingency End Date”. Set the length to 10 characters and save the new control.

Home / Office Settings / Order Form Sections / Property Info / Order Form Controls / Edit a Control in 'Property Info'



Move order control to another section

Property Info

Move Control

Type Text Box

Name Contingency End Date

Description Contingency End Date

Text Value Contingency End Date
This is the label shown in the Order Form

Public Name Contingency End Date
This is the label shown in the Online Scheduler

Length 10 characters

Update Control