



www.inspectorshomebase.com * 612-875-3017

Link – The technician’s phone app

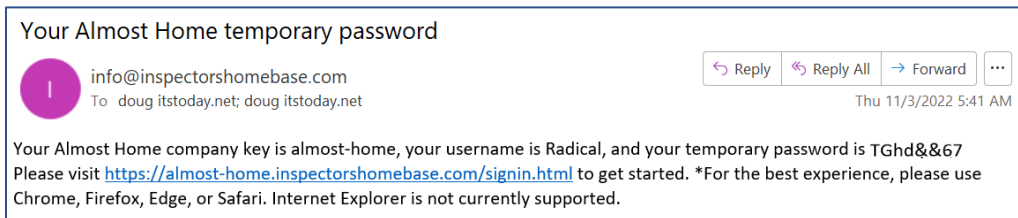
Get the phone app here or shared this link with your tech.



Link provides the technician with information for their daily activities, including route information and tools for performing and recording all their field tasks. Here they will find all the information regarding their schedules, setups and pickups, crm status and assignments and more.

To begin, a technician must be invited by the administrator to join the organization. The technician will receive an email with a link to sign in, set their password, enter their contact information and set their notification preferences.

1. The invitation email looks like this:



2. When following the link the tech will see:

A login form titled "Almost Home". It contains three input fields: "Company Key" with the value "almost-home", "Username" with the value "Radical", and "Password" with the value "TGhd&&67". Below the fields is a blue "Submit" button and a link for "Forgot Password".

3. After entering their assigned username and the temporary password, the tech will be prompted to enter a new password

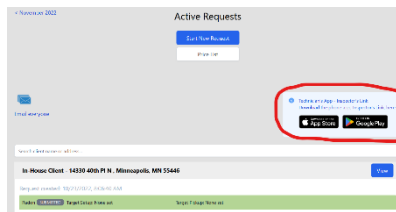
A form for setting a new password. It includes the same "Company Key" and "Username" fields as the previous form. The "Password" field contains "*****" and the "New Password" field also contains "*****". Below these fields is a red message box that says "Please set a new password for this account". At the bottom is a blue "Submit" button and a link for "Forgot Password".

4. Technician completes contact information

(Do Not Synch with Google Calendar at this time)

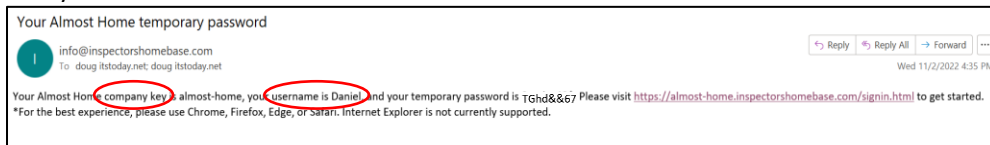
5. Complete the address information and at this time check the boxes **as shown below**. These can be changed later if needed.

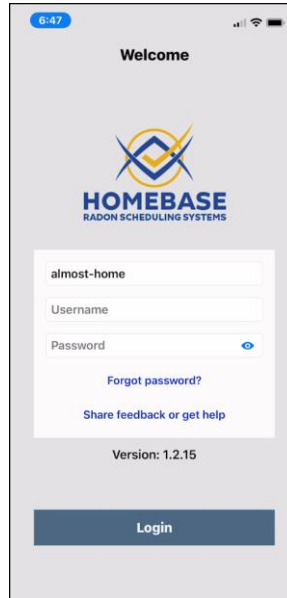
6. The Technician is then taken to this screen. Here they can follow the link to download the free Apple or Google App if not already done so.



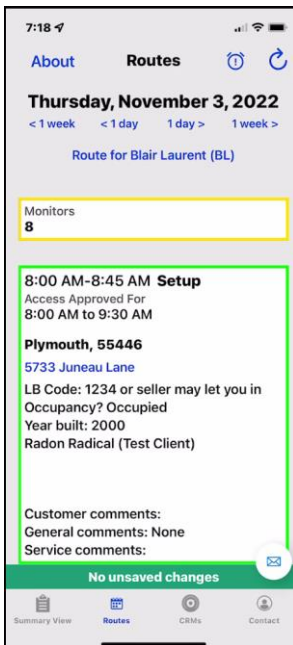
7. After downloading and logging into Link on their phone: Once logged into link the first time you will generally stay logged in (Determined by your phone settings).

- a. Company Key: A company key is required. Your company key is included in your invitation email along with your Username.

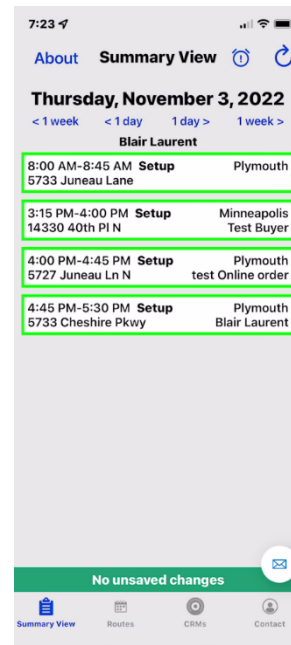




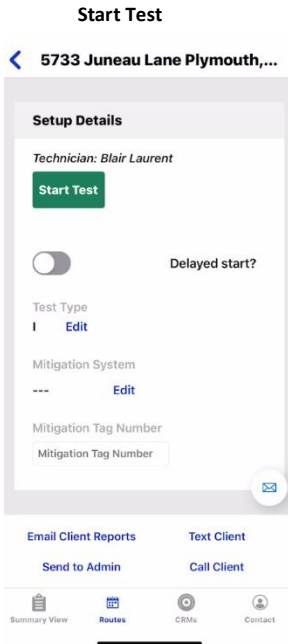
8. The first screen to appear is the Routes Page



1. Once logged in, the appointment appears
2. Selecting "Summary View" at the bottom left of the screen displays the day's route (See right)
3. Yellow bordered box contains the projected number of crms needed for the day
4. Green border appointment indicates it is a setup, red bordered appointment indicates pickup
5. Touching the blue address opens up Google maps or Waze.
6. Tapping the box opens the order

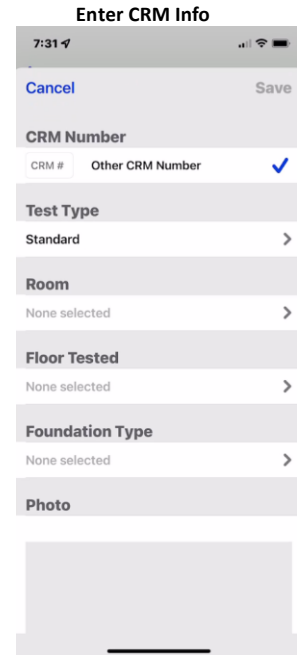
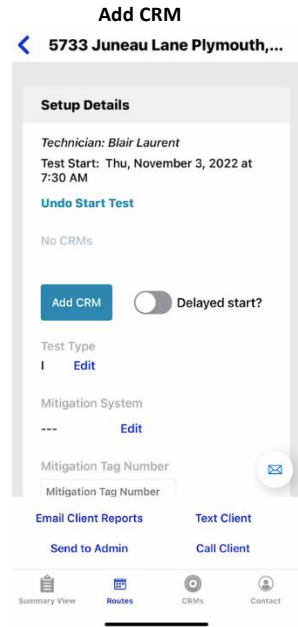
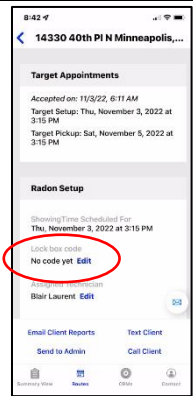


9. Tapping the appointment box opens the order to the "Start Test" screen

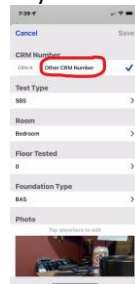


“Start Test” Button is Missing

If you do not see the “Start Test” Button like the screen on the left but instead see the screen below, it means the lock box code has not been enter. This could indicate that the access appointment has not been approved or Admin forgot to enter the code. The tech can enter any value on the lock box field to display the “Start Test” Button



10. Technician enters the crm id and selects the test type. The three test type options are:
- i. Standard – A single monitor in the home
 - ii. SBS (Side-by-Side or Duplicate) A duplicate test – tech will be prompted for a second crm



The tech will see this screen after saving the first crm. The tech then enters the second crm id. Note: the rest of the fields and the picture will be the same for a SBS (Side-by-Side) test.

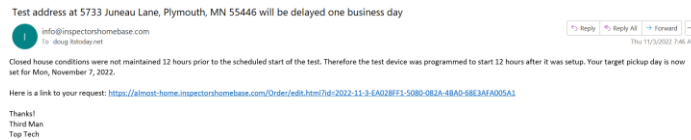
1.

- iii. Multi – Multiple test locations in the home.

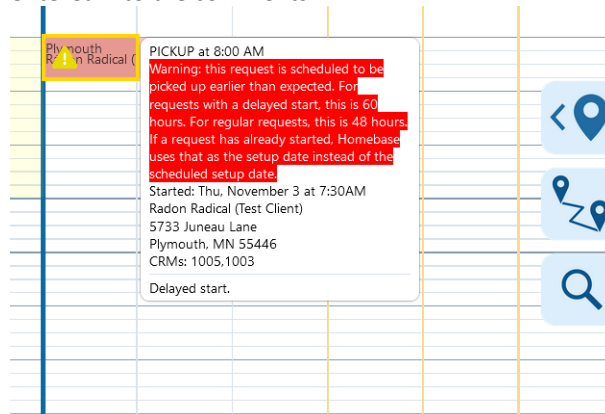
The tech then completes entering the Room, Floor tested, Foundation Type and Takes a photo. The photo is used in the test report if you are using the Homebase Report Writer

- iv. If a delayed start is used the technician selects the “Delayed Start?” option. This action triggers:

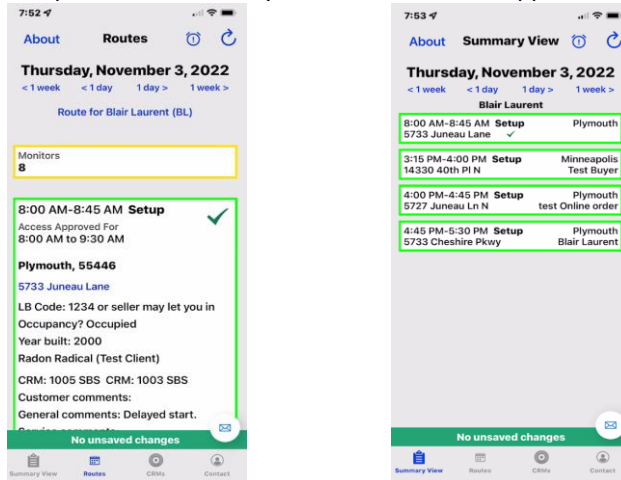
1. An email notification is sent to the client and the administrator



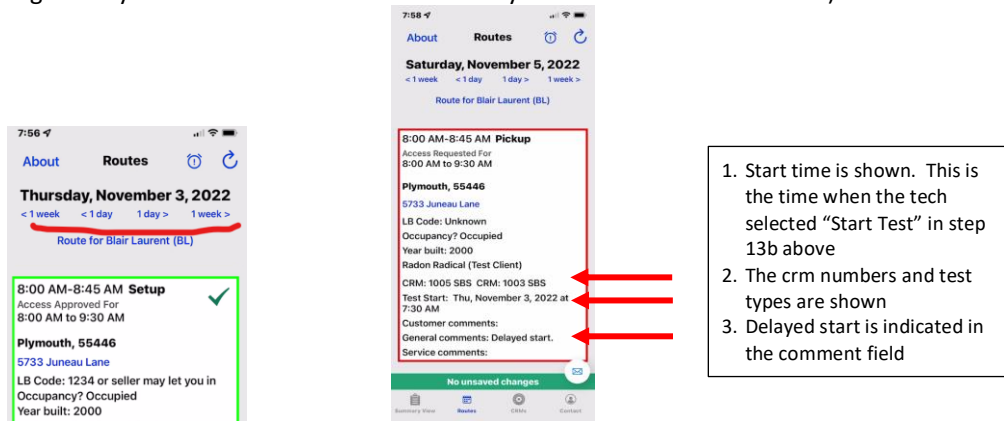
- 2. An alert is placed the pickup appointment on the calendar and “Delayed Start” is entered into the comments



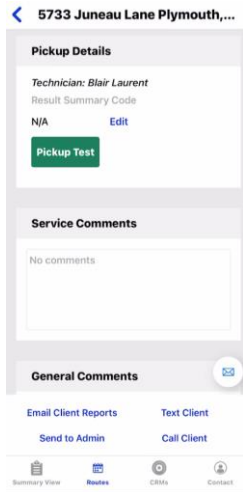
- v. Technician returns to the route screen and receives a Check Mark indicating the appointment is complete. The summary view also shows the appointment completed check mark



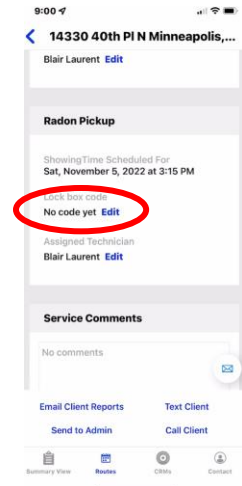
- vi. **The Pickup** – Use the navigations tools to advance by day to the pickup appointment. (Note: this is generally not needed. Link will automatically advance to the current date)



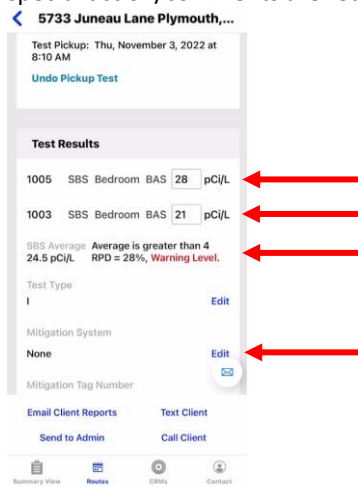
- vii. The Technician selects “Pickup Test”



If you do not see the "Pickup Test" Button like the screen on the left but instead see the screen on the right, it means the lock box code has not been enter. This could indicate that the access appointment has not been approved or Admin forgot to enter the code. The tech can enter any value on the lock box field to display the "Start Test" Button

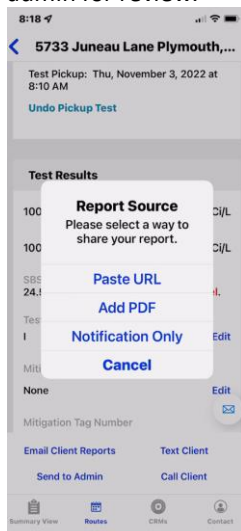


- viii. The technician reads the crm and save the report pdf to their phone
The technician enters the test results and sets the mitigation type. If it is a SBS the Relative Percent Difference (RPD) is displayed. The technician or administrator needs to determine if special action/comments are required.

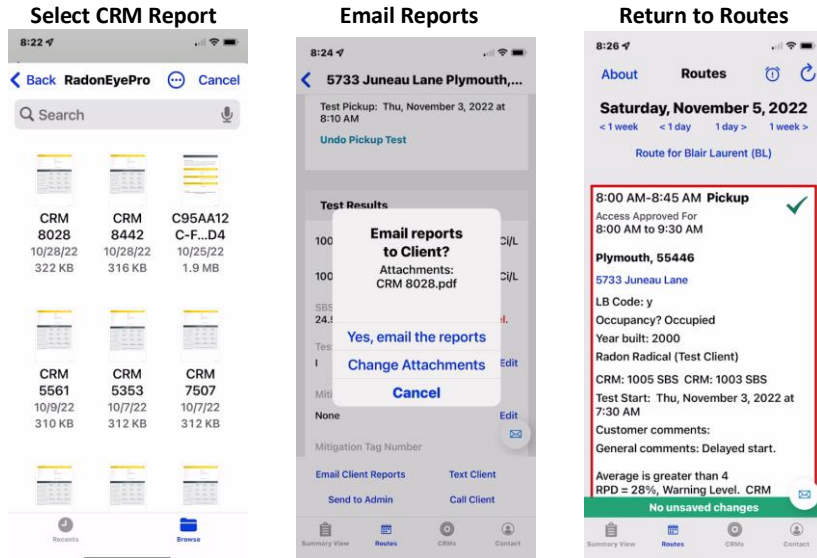


ATTENTION: If your organization is using the Homebase Report Generator the following does not apply. See the specific instructions for the report generator.

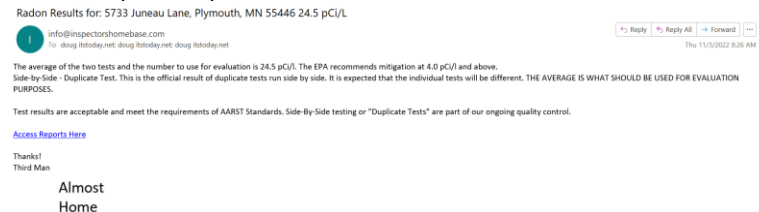
- ix. The tech selects "Email Client Report" Unless there is an issue, then they can send the report to admin for review.



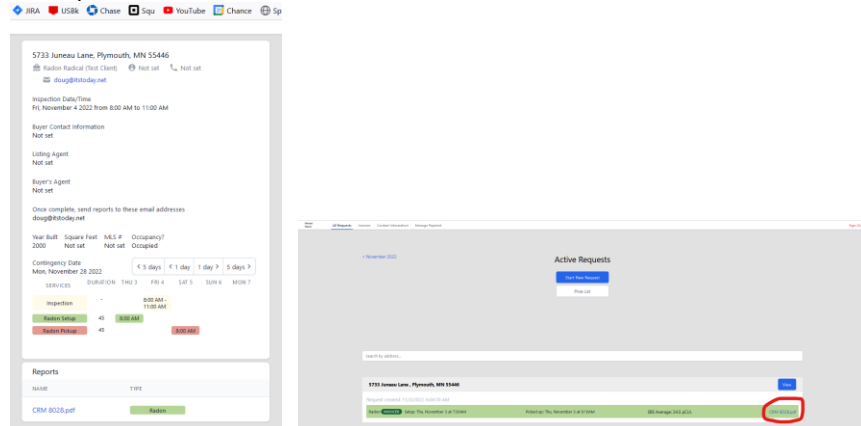
- x. Tech selects "Add PDF", inserts the crm report pdf from the phone and then confirms emailing the report and returns to the route screen to receive the completed stop check mark



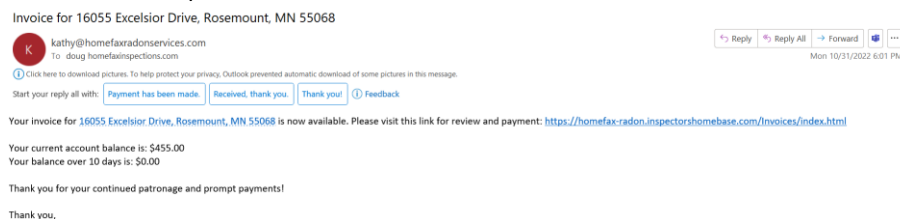
- xi. When the report is sent the client receives an email with the test results and a link to the report and the report is uploaded to Homebase.



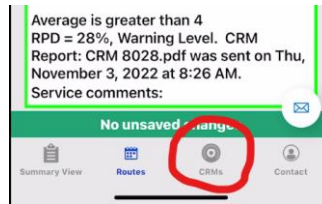
1. The report link takes them to the report in the public view or they can view it in their client portal



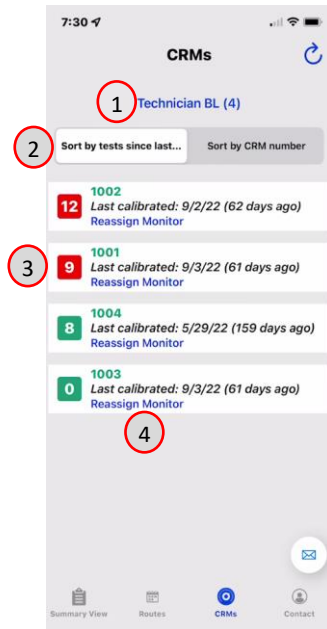
11. Invoices and payments: Once the report is sent the order moves to the invoiced state. The client will receive an email notification giving them a link to the invoice and showing their current balance. Also, the client can view and pay the invoice in their client portal.



12. The CRM Tab is located at the bottom of the screen



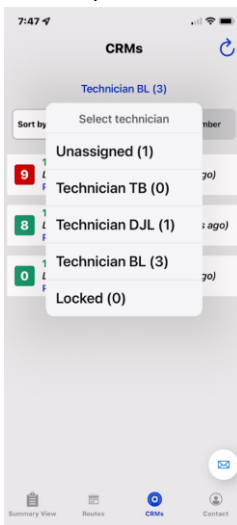
a. The tab will take you to the CRM Assignment Page



Contents

1. Technician Name (number of crms assigned) This is a drop down that will display all technicians and the unassigned crms – those left at the office. This will help the tech if additional crms are needed for the day
2. Sort By Number of tests since last SBS (Side by Side or Duplicate) or Sort by CRM Id
3. Number of tests for each crm since their last SBS This assist the tech to know how many extra crms may be required to meet the duplicate test needs for the day.
4. Reassignment button. This is used when techs pickup or drop of at the offices or make exchanges with other tech

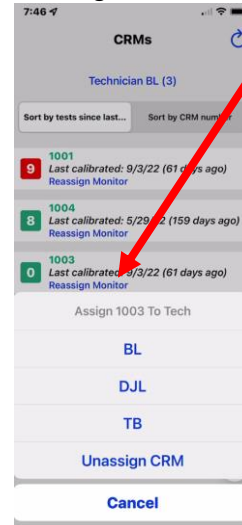
Drop down



Tap technician to pull down a list of other techs to see their crm count

If a tech name is selected a list of their crms will appear

Assign CRM

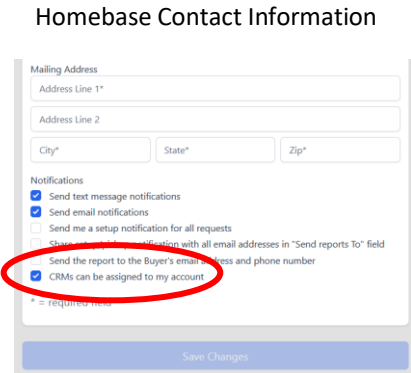
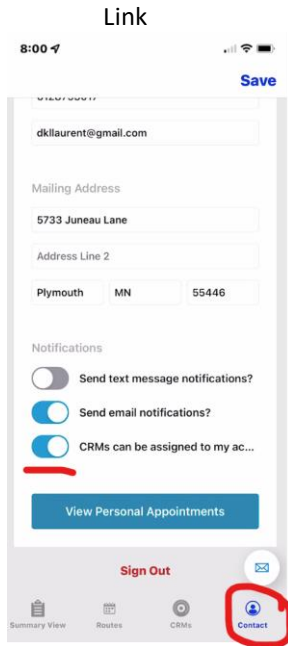


Tap "Reassign Monitor" to show drop down, selecting a tech will reassign the crm to that tech.

Only the tech who has possession of the crm can assign it to another tech. i.e. you can give your monitor to someone else, you can not take one away. Admin can assign crms unrestricted.

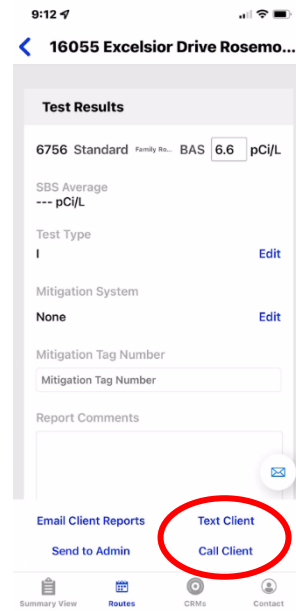
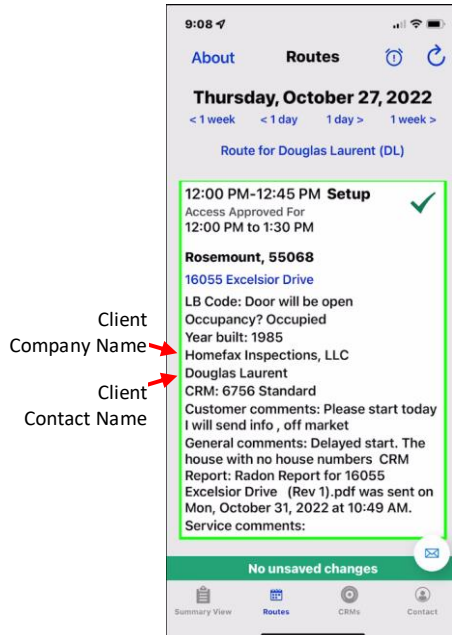
Note: crms are added and removed from techs automatically when setting up or picking up tests.

- b. The ability to assign crms MUST BE ACTIVATED by turning on “CRMs can be assigned to my account from the contacts tab on the bottom right of the screen (Admin can also turn on this feature in the Homebase dashboard.

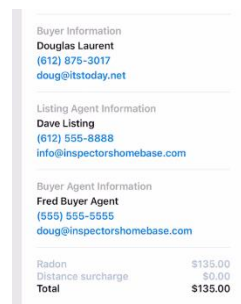
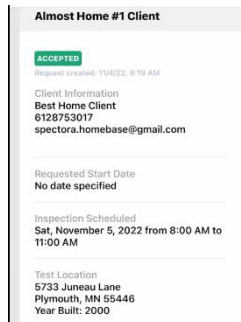


13. Misc Items

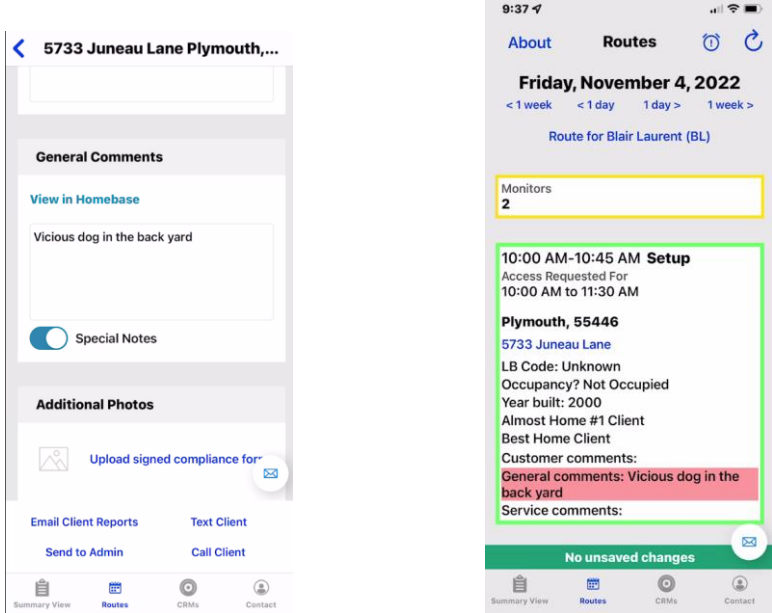
- i. Contact Client – The client can be sent a text or called using the buttons below



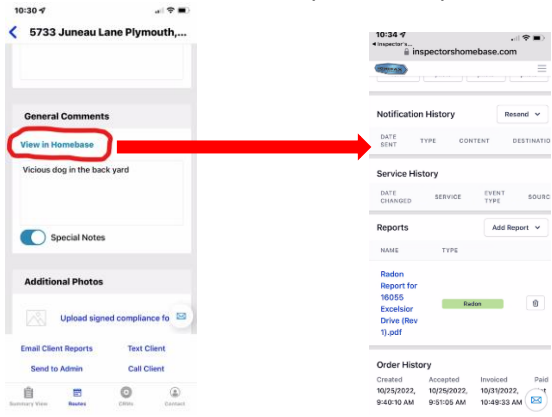
- ii. Scrolling to the top of the form in Link reveals contact information for other individuals involve on the transaction



- iii. General Comments can be added by the Tech. If the “Special Notes” button is activated the note turns red and flashes boldly.



- iv. The tech can view the main work order in the Homebase dashboard. There additional fields can be edited and uploaded reports can be deleted if needed.



- v. Pictures can be added to the work order. The photos are for internal use only. They are not included in the radon report and are not included in any emails.

