

Homebase Quick Start Guide

Minimum Setup – Items in light blue are not required.

Includes instructions for processing your first order

1. Complete the admin “Organization Details” page

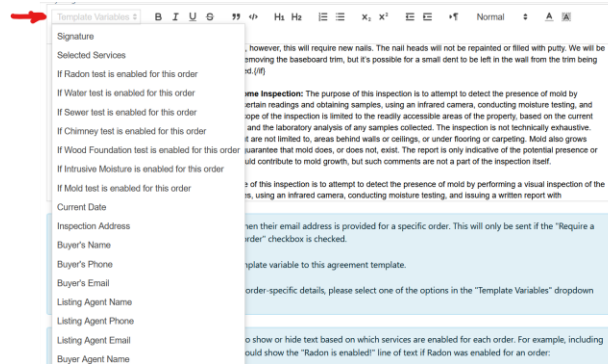
The screenshot shows the Homebase admin interface. At the top, a navigation bar includes 'Management' which is circled in red. Below it, the 'Organization Details' section is also circled in red. The page contains several form fields and informational text. The 'Organization Name' field is filled with 'Second Chance Radon Testing'. The 'Organization Phone Number' is '612-875-3017'. The 'Organization Email' is 'doug@tstoday.net' and is marked as 'Verified'. A light blue informational box states: 'This email address will be used to send notifications to your clients. If it is not provided, notifications will be sent from info@inspectorshomebase.com.' Below this, the 'Company Key' is 'chance'. The 'Subdomain' is 'https://chance.inspectorshomebase.com/signin.html'. The 'Retail Link' is 'https://chance.inspectorshomebase.com/Order/index.html'. The 'Organization Address Line 1' is '4010 Kirkwood Lane'. The 'Organization City' is 'Plymouth' and the 'Organization State' is 'MN'. The 'Organization Zip' is '55441'. A 'Notification Footer' section contains the text: 'Thanks Mike Best Home Inspector Ever'. At the bottom, there are checkboxes for 'Require buyer name, phone, and email for all orders' and 'Require listing agent name for all orders'. A 'Buyer Agreement Behavior' dropdown menu is set to 'Require a signed agreement from the buyer for Retail orders only'. Below this is a rich text editor with various formatting options.

2. Sample Buyer Agreement Content – NOT REQUIRED IF YOU ARE NOT USING HOMEBASE FOR YOUR INSPECTION AGREEMENTS

- a. Choose option for Buyer Inspection Agreement
 - i. A signed agreement is not required
 - ii. Require a signed agreement from the buyer for all orders
 - iii. Require a signed agreement from the buyer for Retail orders only

The screenshot shows a dropdown menu for 'Buyer Agreement Behavior'. The selected option is 'Require a signed agreement from the buyer for Retail orders only'. Other options include 'A signed agreement is not required', 'Require a signed agreement from the buyer for all orders', and 'Require a signed agreement from the buyer for Retail orders only'.

- b. Use Template Variables to insert order details such as inspection address, buyer names etc.



- c. Sample agreement content with variables
(Variables are field names beginning and ending with %, i.e. %current date%)

INSPECTION AGREEMENT

2nd Chance Inspection

5733 Juneau Lane

Plymouth, MN 55446

612-875-3017

Date: %current-date%

CLIENT: %buyer-name%

EMAIL: %buyer-email%

Buyer PHONE(S): C: %buyer-phone%

INSPECTION ADDRESS: %inspectionaddress%

PLEASE READ THIS AGREEMENT CAREFULLY

For good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the client as identified above (hereinafter “Client”) and Inspection Services LLC (hereinafter “Company”) agree as follows:

I. PURPOSE AND SCOPE OF INSPECTION SERVICE(S).

The following services will be conducted by Company:

%selected-service-list%

The purpose and scope for the inspection(s):

{if %radon-enabled-for-order% }**Radon Test:** The purpose of the radon test is to detect the level(s) of radon within the lowest livable area, any adjacent slab(s) and/or crawl space(s) of the Subject Property and provide the client the radon levels for possible radon mitigation if levels are elevated above 4.0 pCi/L. This is a short-term test conducted in accordance with the regulations set forth by the Minnesota Department of Health (MDH).{/if}

{if %water-enabled-for-order% }**Water Test:** The purpose of a water test is to determine overall levels of nitrates and bacteria in the water supply. Nitrates and bacteria are included in a standard water test. Testing for additional heavy metals and chemicals can be added for additional fees.{/if}

{if %sewer-enabled-for-order% }**Sewer Inspection:** The purpose of this inspection is to assess the overall condition of the mainline sewer from the foundation wall of the home to the connection at the main city sewer line or the connection at the septic tank. This inspection is not a guarantee of the longevity of the pipe. Any areas referenced in the report which fall outside of the aforementioned section of the mainline sewer are done so as a courtesy and are not required.{/if}

{if %chimney-enabled-for-order% }**Chimney Inspection:** The purpose of this inspection is to assess the overall condition of the chimney in accordance with the standards for a Level 2 Chimney Inspection as set forth by the Chimney Safety Institute of America (CSIA).{/if}

{if %stucco-enabled-for-order% } Stucco testing - ???{/if}

{if %wood-foundation-enabled-for-order% }**Wood Foundation Inspection:** The purpose of a wood foundation inspection is to determine if moisture intrusion has occurred at the wood foundation, which would indicate a failed water management system. This is considered an intrusive inspection, and will only be conducted with the homeowner’s written consent. The baseboard trim in the finished basement areas will be removed as needed to cut or drill small holes in the drywall, in order to view the foundation in a representative number of locations – possibly as many as eight. The holes made in the drywall will be no more than 1” tall by 3” wide. We will attempt to make these holes only in areas that will be covered over by the baseboard trim. Any drywall dust or debris will be cleaned up. The baseboard trim will be re-installed, however, this will require new nails. The nail heads will not be repainted or filled with putty. We will be as careful as possible not to damage the walls while removing the baseboard trim, but it’s possible for a small dent to be left in the wall from the trim being pried off; no patching or painting of the walls is included.{/if}

{if %mold-enabled-for-order% }**Mold Inspection w/ Home Inspection:** The purpose of this inspection is to attempt to detect the presence of mold by performing a visual inspection of the property, taking certain readings and obtaining samples, using an infrared camera, conducting moisture testing, and issuing a written report with recommendations. The scope of the inspection is limited to the readily accessible areas of the

property, based on the current conditions of the property at the time of the inspection and the laboratory analysis of any samples collected. The inspection is not technically exhaustive. Mold can exist in inaccessible areas which include, but are not limited to, areas behind walls or ceilings, or under flooring or carpeting. Mold also grows under certain conditions. As such, the report is not a guarantee that mold does, or does not, exist. The report is only indicative of the potential presence or absence of mold. We may point out conditions that could contribute to mold growth, but such comments are not a part of the inspection itself.

Mold Inspection w/o Home Inspection: The purpose of this inspection is to attempt to detect the presence of mold by performing a visual inspection of the property, taking certain readings and obtaining samples, using an infrared camera, conducting moisture testing, and issuing a written report with recommendations. The scope of the inspection is limited to the readily accessible areas of the property, based on the current conditions of the property at the time of the inspection and the laboratory analysis of any samples collected. The inspection is not technically exhaustive. Mold can exist in inaccessible areas which include, but are not limited to, areas behind walls or ceilings, or under flooring or carpeting. Mold also grows under certain conditions. As such, the report is not a guarantee that mold does, or does not, exist. The report is only indicative of the potential presence or absence of mold. We may point out conditions that could contribute to mold growth, but such comments are not a part of the inspection itself.

Mold (PRV) Post-Remediation Verification: The purpose of this inspection is to attempt to detect the presence of mold by performing a visual inspection of the property, taking certain readings and obtaining samples, using an infrared camera, conducting moisture testing, and issuing a written report with recommendations. The scope of the inspection is limited to the readily accessible areas of the property, based on the current conditions of the property at the time of the inspection and the laboratory analysis of any samples collected. The inspection is not technically exhaustive. Mold can exist in inaccessible areas which include, but are not limited to, areas behind walls or ceilings, or under flooring or carpeting. Mold also grows under certain conditions. As such, the report is not a guarantee that mold does, or does not, exist. The report is only indicative of the potential presence or absence of mold. We may point out conditions that could contribute to mold growth, but such comments are not a part of the inspection itself. {/if}

II. LIMITATIONS. There is no express or implied warranty of any kind regarding the condition of the property or any of the items or systems contained therein, or as to the future performance or expected lifespan of any of the items or systems contained therein, whether or not mentioned in the Inspection Report(s). The inspection services do not constitute a general warranty, an insurance policy, a certification, or a guarantee of any kind.

III. NOTICE OF CLAIM. Any claim arising out of or related to any act or omission of the Company in connection with the inspection of the property shall be made in writing and reported to the Company within fourteen (14) business days of discovery and to allow Company a reasonable opportunity to re-inspect the issue giving rise to the claim before undertaking any repairs. Client agrees that a failure to comply with the terms of this paragraph shall constitute a waiver of such claim.

IV. LIMITED LIABILITY. The parties agree that the maximum liability of the Company, and its employees and agents, for any loss or damage, in the event the Company, or its employees or agents, are negligent, in breach of contract, or otherwise at fault in the performance of its obligations, shall be limited to a sum equal to the fee for the inspection service(s). In the event of litigation relating to the subject matter of this Agreement, the non-prevailing party shall reimburse the prevailing party for all reasonable attorney fees and costs resulting therefrom.

V. NON-ASSIGNMENT AND INDEMNITY. The inspection and report are performed and prepared for the sole, confidential, and exclusive use and possession of the undersigned client only; they do not run with the land.

VI. ENTIRE AGREEMENT. This agreement represents the entire agreement between the parties. No change or modification shall be enforceable against any party unless such change or modification is in writing and signed by the parties. This agreement shall be binding upon and enforceable by the parties, and their heirs, executors, administrators, successors, and assigns.

VII. SEVERABILITY PROVISION. If any portion of this agreement is ruled to be illegal or unenforceable, that provision shall be null and void but the remainder of the agreement shall remain in full force and effect.

VIII. DISPUTE RESOLUTION; MEDIATION. If any dispute arises out of or relates to this contract or the Company's provision of services, and if the dispute is not settled through negotiation, the parties agree to attempt in good faith to resolve the dispute first through mediation, within 60 days, before resorting to litigation or some other dispute resolution procedure. Each party shall bear its own costs and will share equally in the mediator's fee. If the parties cannot agree on a mediator, then the parties agree that Tim Cook of Cook ADR shall serve as the mediator for the dispute.

IX. NO RULE OF CONSTRUCTION. The parties acknowledge that each of them has had ample opportunity for their own counsel to participate in negotiating and drafting this Agreement. Therefore, no rule of construction shall apply to this Agreement that construes ambiguous or unclear language in favor of or against any party.

X. BINDING ON OTHERS CLAUSE. This Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective spouses, heirs, and successors.

XI. INTEGRATION CLAUSE. This Agreement constitutes the entire agreement of the parties with respect to the subject matter hereof and supersedes all prior negotiations, agreements, and understandings with respect thereto. This Agreement may only be amended by a written document duly executed by all parties and shall be construed and enforced in accordance with the laws of the State of Minnesota.

XII. NON-WAIVER CLAUSE. The failure by one party to require performance of any provision shall not affect that party's right to require performance at any time thereafter, nor shall a waiver of any breach or default of this Contract constitute a waiver of any subsequent breach or default or a waiver of the provision itself.

XIII. PHOTOGRAPHS/VIDEO. Consistent with 17 USC Section 107, Company may use photographs and/or video images obtained during an inspection of the Property for the nonprofit educational purposes of internal training and teaching of employees and independent contractors, and for scholarship or research. Customer further grants Company permission to use any obtained visual images as an advertisement, or to promote Company website, products or services, or ideas.

XIV. WAIVER OF STATUTE OF LIMITATIONS. Any dispute, controversy, interpretation, or claim including claims for, but not limited to, breach of contract, any form of negligence, fraud, or misrepresentation arising out of, from, or related to this contract or arising out of, from, or related to the inspection and inspection report shall be commenced within one year of the date of the inspection, without regard to the date the breach is discovered. Any action not brought within that one-year time period shall be barred, without regard to any other limitations period set forth by law or statute.

CLIENT ACKNOWLEDGES THAT HE OR SHE HAS READ THIS AGREEMENT IN FULL PRIOR TO SIGNING IT AND UNDERSTANDS ALL TERMS AND CONDITIONS.

This requires your signature

By signing you acknowledge that you are %buyer-name% or you are legally authorized to sign on their behalf.

%buyer-name%

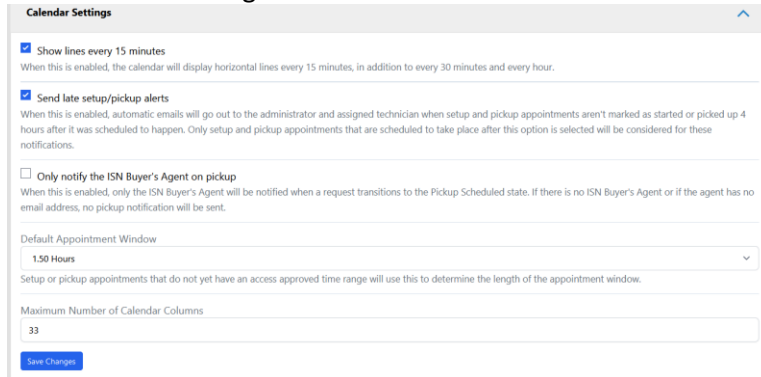
%buyer-email%

%signature-line%

%current-date%

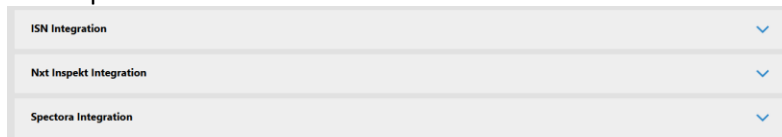
(Once signed you will receive an email with a pdf copy of the signed agreement)

3. Edit Calendar Settings



4. If you wish to connect Homebase to your home inspection scheduling system, choose your system. (Not required) (Each integration type includes a pdf instruction sheet)

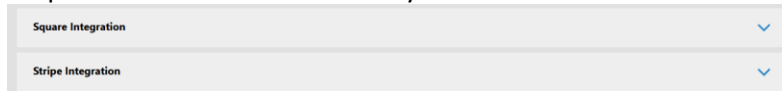
- a. ISN – Inspection Support Network
- b. Spectora
- c. Nxt Inspekt



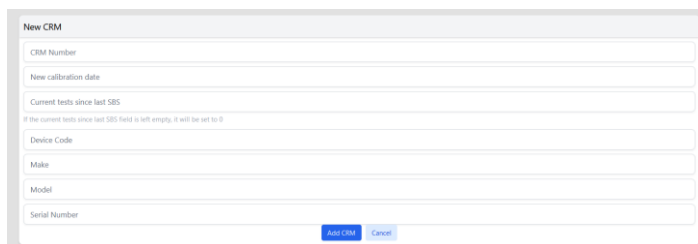
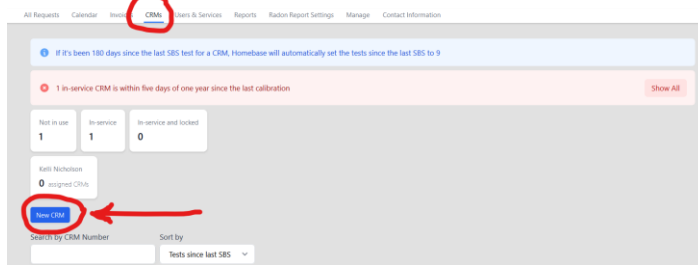
d.

5. If you are planning on accepting payments through Homebase, setup your payment processor. (Not Required) (Look for instructions within the setup pane)

- a. Square for Credit Card Payment
- b. Stripe for Credit Card and ACH Payments



6. Add at least one CRM (Continuous Radon Monitor)



- a. CRM Number – The code (alpha & numeric characters allowed) you use to identify your monitors
- b. New Calibration Date – The date the CRM was last Calibrated
- c. Current tests since last SBS (Side-by-Side - Duplicate) O.K. to leave blank
- d. Device Code – AARST code assigned to your monitor make and model (Link to latest AARST List <https://nrpp.info/devices/approved-devices/>)
- e. Make - Manufacturer Name
- f. CRM Model Name or Number
- g. Serial Number – Serial number unique to this unit

7. Invite at least one technician

Note: User Name cannot ever be changed. Initials and Password can be changed anytime

The screenshot shows the 'Invite Technicians' form in the Homebase system. The form includes fields for 'Initials', 'Email Address', 'Username', and 'Temporary Password'. A blue 'Invite Technicians' button is visible at the bottom of the form. Below the form, there are sections for 'Invite Clients', 'Pending Invitations (1)', 'All Technicians (4)', and 'All Clients (0)'. A navigation menu at the top includes 'All Requests', 'Calendar', 'Invoices', 'CRM', 'Users & Services', 'Reports', 'Radius Report Settings', 'Manage', and 'Contact Information'.

8. Invite (create) a Test Client

Note: User Name cannot ever be changed. Initials and Password can be changed anytime

The screenshot shows the 'Invite Clients' form in the Homebase system. The form includes fields for 'Client Business', 'Email Address', 'Username', and 'Temporary Password'. A blue 'Invite Client' button is visible at the bottom of the form. Below the form, there are sections for 'Pending Invitations (1)', 'All Technicians (4)', and 'All Clients (0)'. A navigation menu at the top includes 'All Requests', 'Calendar', 'Invoices', 'CRM', 'Users & Services', 'Reports', 'Radius Report Settings', 'Manage', and 'Contact Information'. The 'Users & Services' menu item is circled in red.

9. Technician invitation

a. Technician receives email

Your Almost Home temporary password



info@inspectorshomebase.com
To: doug.istoday.net; doug.istoday.net

Reply Reply All Forward ...
Wed 11/2/2022 4:35 PM

Your Almost Home company key is almost-home, your username is Daniel, and your temporary password is Sunday485. Please visit <https://almost-home.inspectorshomebase.com/signin.html> to get started.
*For the best experience, please use Chrome, Firefox, Edge, or Safari. Internet Explorer is not currently supported.

b. Tech follows Link in email and enters username and temporary password

The screenshot shows the login form for the technician. It includes fields for 'Company Key', 'Username', and 'Password'. The 'Company Key' field contains 'almost-home', the 'Username' field contains 'Daniel', and the 'Password' field contains '*****'. A blue 'Submit' button is visible at the bottom of the form, along with a 'Forgot Password' link.

c. Technician enters New Password

The screenshot shows the password change form for the technician. It includes fields for 'Company Key', 'Username', 'Password', and 'New Password'. The 'Company Key' field contains 'almost-home', the 'Username' field contains 'Daniel', the 'Password' field contains '*****', and the 'New Password' field contains '*****'. A red message box says 'Please set a new password for this account'. A blue 'Submit' button is visible at the bottom of the form, along with a 'Forgot Password' link.

d. Technician completes contact information

(Do Not Synch with Google Calendar at this time)

e. At this time check the boxes as shown below. These can be changed later if needed

f. Save Changes

g. Technician is then taken to this screen. Here they can follow the link to download the free Apple or Google App

10. Setup your Radon Service Pricing, Service Area and Distance Charges. At least one distance setting must be entered to set your service area and avoid a warning message "Outside of service area, please call to confirm..."

a. The Radon Listing Agent Notification is sent out by the scheduler once the appointment to access the home has been requested. A sample email and seller compliance form have been entered to help you get started, **HOWEVER, it must be personalized to your organization and**

state requirements.

Radon Listing Agent Notification of Required Test Conditions Message

Template Variables: B I U G P P H H H H H H X₁ X₁ E E E E Normal A A

Sans Serif

Your buyer has requested that a radon test be performed on your listing. The test is tentatively scheduled to be setup %radon-drop-date% between %radon-drop-access-start-time% and %radon-drop-access-end-time% and picked up %radon-pickup-date%. Please note the actual appointment times will be requested through Showingtime or directly with the listing agent. The Minnesota Department of Health requires certain test conditions beginning 12 hour prior to the start of the test and continue throughout the entire test period. (Due to the limited time given by the transaction we understand that you may be receiving this notice only hours even minutes before the setup appointment. In those cases, our technician will determine if it is necessary to just a delayed start on the test device, which may extend the test by one day.) The test will run for a MINIMUM of 48 hours and may last up to 4 days. The primary condition that will affect the seller is closed house conditions. ALL exterior doors and ALL windows on ALL LEVELS throughout the home must be kept closed. DOORS MAY BE OPENED BRIEFLY FOR NORMAL ENTRY AND EXITING. The sellers can follow the link below to a "Voluntary Compliance Agreement". There they can review and sign the agreement. Please forward this email to the sellers. It is extremely important that the sellers/occupants understand the requirements for an accurate test. Again, please note, that signing of the agreement is a voluntary show of good faith. Sellers can follow this link to sign the voluntary compliance form: %link-to-sign-compliance-form%. In addition, we know the Sellers love their pets, so for their safety and ours, pets should be kenneled or controlled for the appointment. Please do not hesitate to call me if you have any questions or concerns.

The Listing Agent Notification of Required Test Conditions Message message is sent to the listing agent when their email address is provided for a specific test request. If you'd like to customize this message with request-specific details, please select one of the options in the "Template Variables" dropdown menu.

Save Changes

- b. If you do not wish to send a compliance form when you send a notification, remove the text from the Radon Compliance Form template.

Radon Compliance Form

Template Variables: B I U G P P H H H H H H X₁ X₁ E E E E Normal A A

Sans Serif

Seller or Responsible Party Signature and Title (Owner, Tenant, Seller's Realtor etc.):
%signature-line%

Homefax Radon Services

Kathy Laurent
Minnesota Licensed Radon Specialist
LL & RMA 00013 312-201-9602
kch@homefaxradon.com



MINNESOTA DEPARTMENT OF HEALTH

Radon Measurement Professional

License Number: %license-number% Approved On: %license-date%

Katharine Laurent
5223 James Ln N
Plymouth, MN 55448
License valid from %license-start-date% to %license-end-date%

If you'd like to customize this message with request-specific details, please select one of the options in the "Template Variables" dropdown menu. Please make sure to add the "Signature" template variable to this agreement template.

Save Changes

- c. Add an attachment to the email if desired

Radon Listing Agent Notification Attachments

Upload a file
PDF file only

These forms will be attached to the email sent to the listing agent when their email address is provided for a specific test request and will be shared as a link on the Radon request form. These forms are expected to be a PDF file.

- d. Compliance form is accessed by the seller through a link in the notification email. The form can be signed by the seller online, a copy is uploaded to the work order under reports.

11. Activate the services your organization will be using in Homebase (Radon is Always Selected)

All Reports Calendar Invoicing CRM **Services & Services** Reports Radon Report Settings Manage Contact Information

Please note: If you're integrated with Spectra, DN, or Net Inspekt, orders entered in those systems prior to enabling your services in Homebase may not be created in Homebase. For example, if you offer Chimney inspections as a service in Spectra, but don't yet have it enabled in Homebase, Spectra inspections with Chimney will not automatically appear in Homebase.

- Invite Technicians
- Invite Clients
- Pending Invitations (0)
- All Technicians (0)
- All Clients (1)
- Radon Enabled
- Water Enabled
- Sewer Enabled
- Chimney Enabled
- Intrusive Moisture Enabled
- Wood Foundation Enabled
- Mold Testing Enabled
- Aerial Roof Inspection Disabled

- a. Select Services offered and enter Product description, pricing, and notification template

Homebase

Radon Base Charge

1	0.00	1	0.00
---	------	---	------

Radon Inspection Fee

1	0.00	1	0.00
---	------	---	------

Radon Additional Fee for Post

1	0.00	1	0.00
---	------	---	------

Product Description

Your description is pasted in a popup in the link.

Select Listing Agent Notification of Required Test Conditions Message

Template Variables: B I U G P P H H H H H H X₁ X₁ E E E E Normal A A

Sans Serif

The Listing Agent Notification of Required Test Conditions Message message is sent to the listing agent when their email address is provided for a specific test request. If you'd like to customize this message with request-specific details, please select one of the options in the "Template Variables" dropdown menu.

Save Changes

Radon Listing Agent Notification Attachments

Upload a file
PDF file only

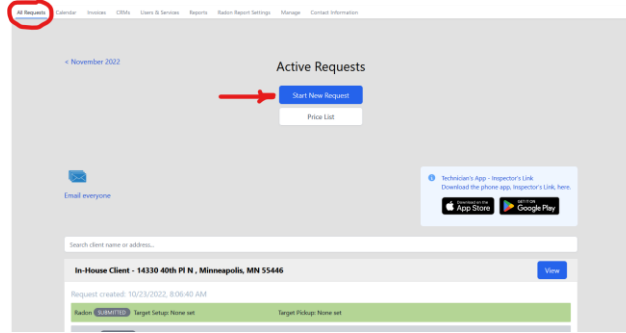
These forms will be attached to the email sent to the listing agent when their email address is provided for a specific test request and will be shared as a link on the Radon request form. These forms are expected to be a PDF file.

Chimney Disabled

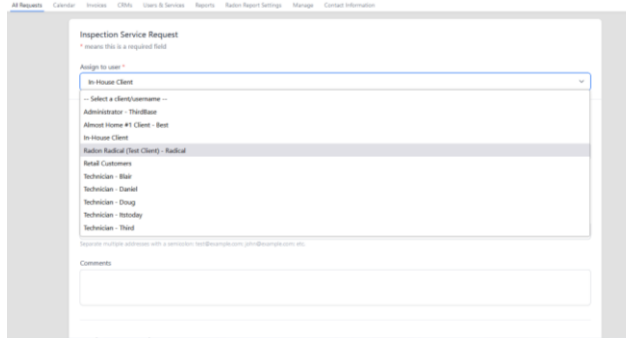
Save & Publish

12. Enter your first test order

- a. Navigate to the "All Request" screen and select "Start New Request"



- b. Select the test Client created in step #8 above

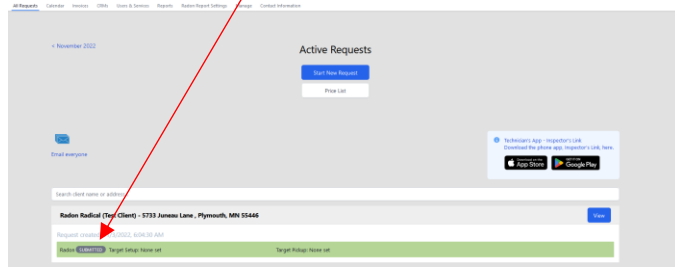


- c. Complete the Order Form

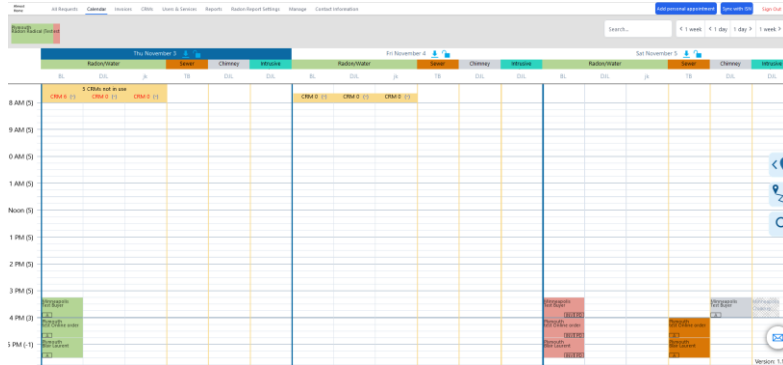
Bill Buyer Directly: This box is used when your home inspector client places an order for the buyer but wants the buyer to be billed directly by your organization. If checked, the buyer contact information must be included. This feature is not used for orders imported from ISN, Spectora or Nxt Inspekt.

Contact information is generally not required unless you are requiring Buyer Inspection agreements or billing buyer directly. A listing agent email is required for the "Listing Agent Notification Email", however this can be added by the scheduler later in the process.

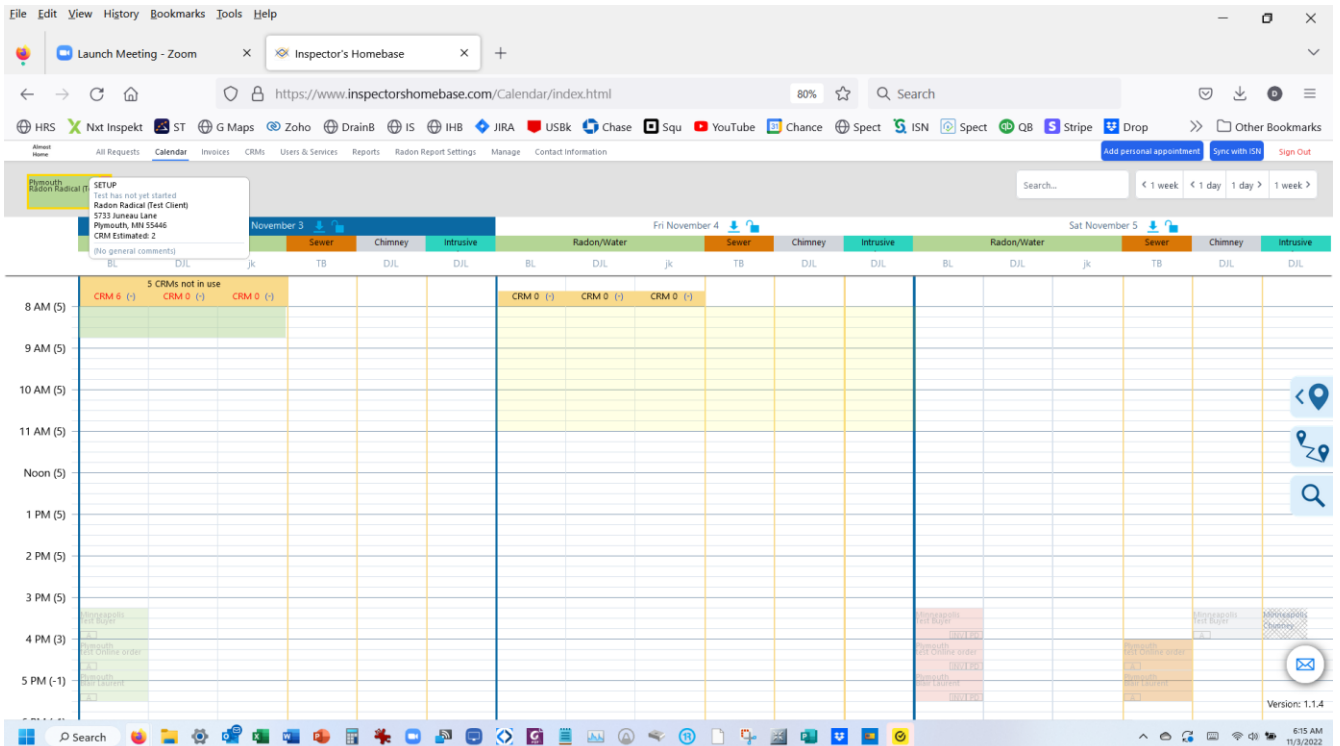
- d. Submit Request – takes target back to the Active Requests screen where you will see the new order with the status “Submitted”



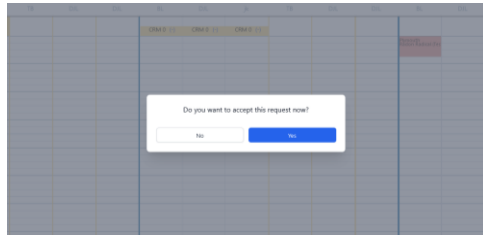
- e. Navigate to the Calendar – Order appears as a green (setup) and a red (pickup) appointment block



- f. When hovering over the appointment blocks several pieces of information appear
- i. Client Name and test address
 - ii. Requested Start Date/Time – Green shaded area
 - iii. Inspection Date/Time – Yellow shaded area
 - iv. After Setup appointment is placed on the calendar, the projected pickup Date/Time – Red shaded area



- g. Move (drag and drop) appointments to the calendar. Each column represents a technician. When setup and pickup appointments have been placed you will be asked “Do you want to accept this request now?” Replying yes sends an email to the client with the setup and pickup dates. The client is not notified about the setup or pickup time until the appointment to access the home has been approved and the lock box code or access instructions are entered.



Accepted Request - 5733 Juneau Lane, Plymouth, MN 55446

info@inspectorshomebase.com
To: doug@istoday.net

Your request for 5733 Juneau Lane, Plymouth, MN 55446 has been accepted.

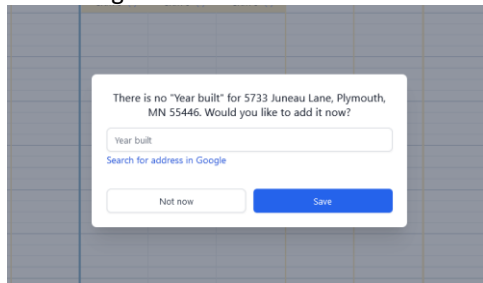
Target Radon setup inspection date: Thu, November 3
Target Radon pickup inspection date: Sat, November 5

Here is a link to your request: <https://almost-home.inspectorshomebase.com/Order/edit.html?id=2022-11-3-EAG2DF1-5080-082A-4BA0-88E3MAD05A1>

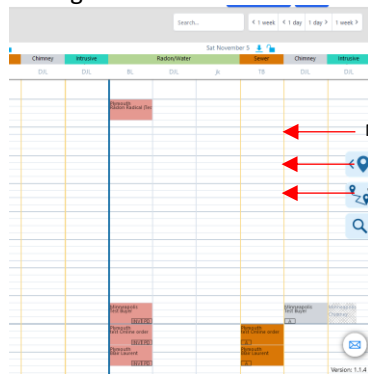
Thanks!
Third Man
Tap Tech

Almost
Home

- h. If the year built was not entered into the order for the scheduler will receive this prompt. The year is not required to process the order. However, most states require this information when submitting test records. There is a link to a Google search of the address to lookup the year built)



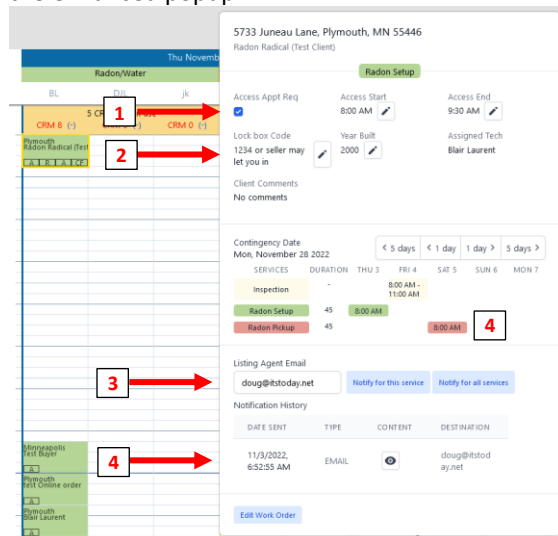
- i. Perform scheduling tasks, arrange efficient routes using the mapping and distance tools
 - i. Arrange Routes

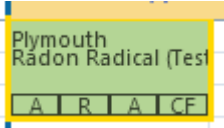


To use the distance tool - select the tool, then click on the two appointments that you want the distance and time calculations.

To use the Google search tool - select the tool and click on the appointment, the Google search result will open in a new browser tab.

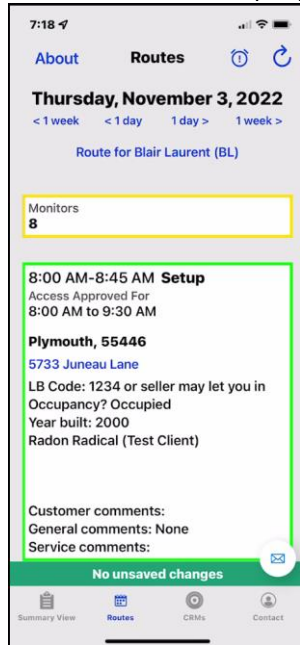
- ii. Request access appointments - A single left click on the appointment block brings up the enhanced popup



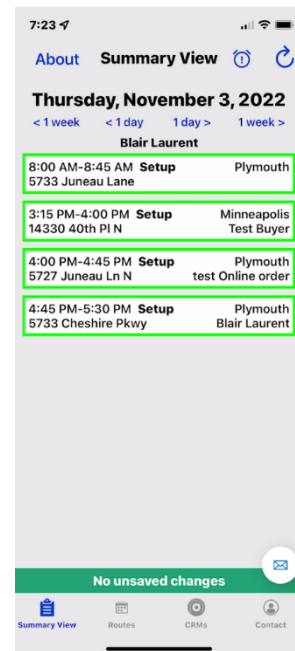
1. Access Appointment Requested - Check this box when request is made to the listing agent. (Adds a little "R" to the setup appointment block)
 2. Enter Lockbox or access information (Adds little "A" for approved, to the setup appointment block)
 3. Email listing agent of test closed hose conditions (Adds little "CF" for compliance form, to the setup appointment block)
- 
- NOTE: a lockbox value must be entered to allow the techs to start or pickup a test in their phone app.*
4. Clicking pink box with setup time changes the popup to the setup appointment details

13. Setup and pickup order in the phone app Link

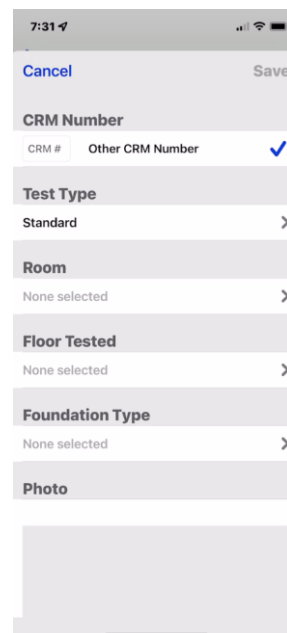
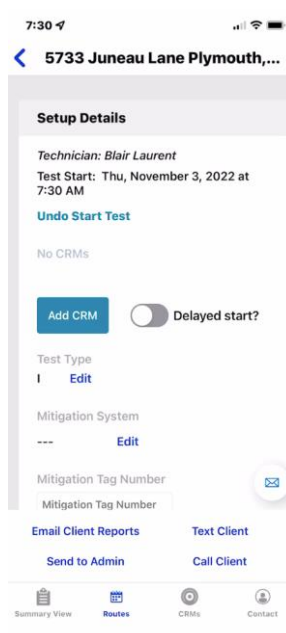
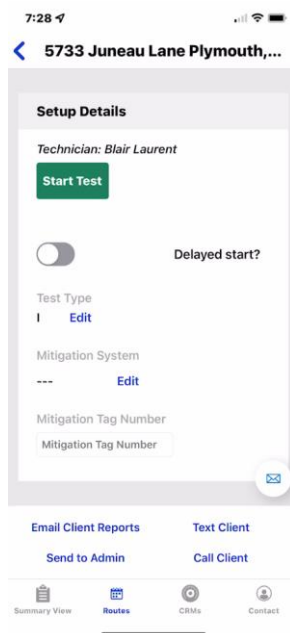
- a. Login to the phone app for the technician with the test appointment. See the initials at the top of the column the setup is placed on the calendar.



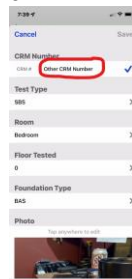
1. Once logged in, the appointment appears
2. Selecting Summary View at the bottom left of the screen displays the day's route (See right)
3. Yellow bordered box contains the projected number of crms for the day
4. Green border appointment indicates it is a setup, red bordered appointment indicates pickup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



- b. Technician selects Start test, then "Add CRM"



- c. 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



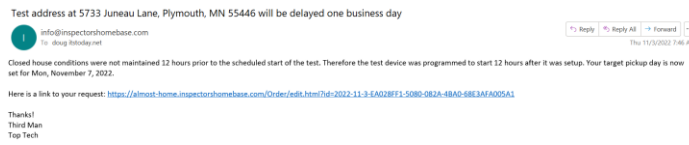
The tech will see this screen after saving the first crm. The tech then enters the second crm id. Note: the rest of the fields and the picture will be the same for a SBS (Side-by-Side) test.

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

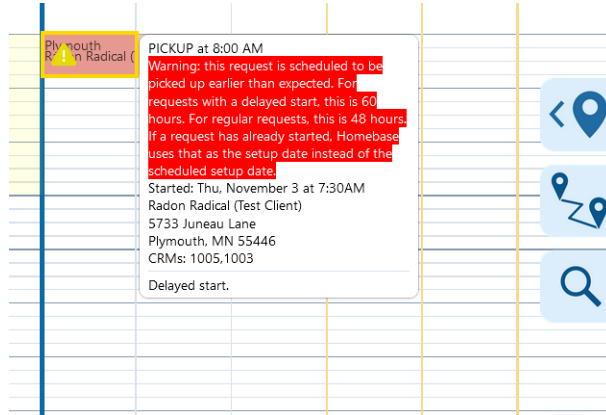
The tech then completes entering the Room, Floor tested, Foundation Type and Takes a photo. The photo is used in the test report if you are using the Homebase Report Writer

- d. If a delayed start is used the technician selects the "Delayed Start?" option. This action triggers:

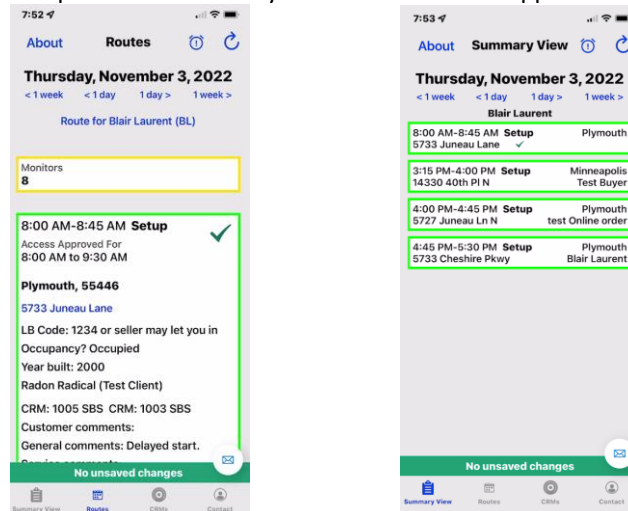
- i. An email notification is sent to the client and the administrator



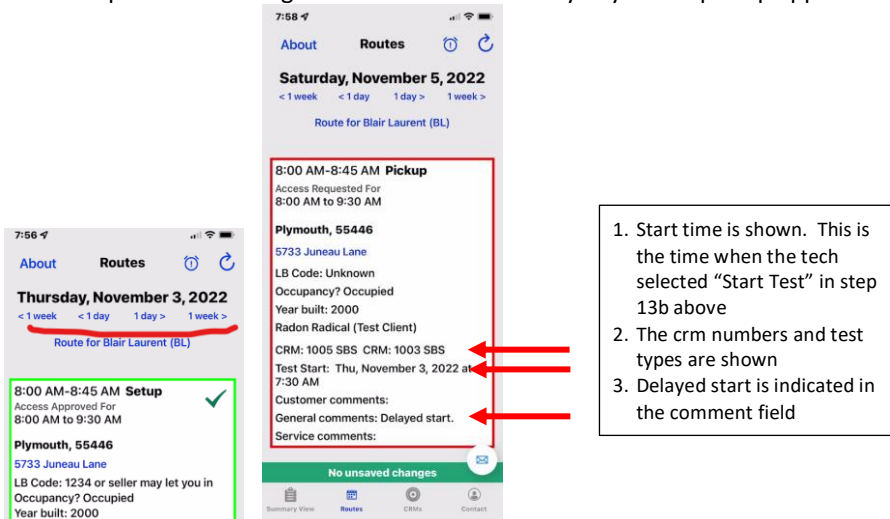
- ii. An alert is placed the pickup appointment on the calendar and “Delayed Start” is entered into the comments



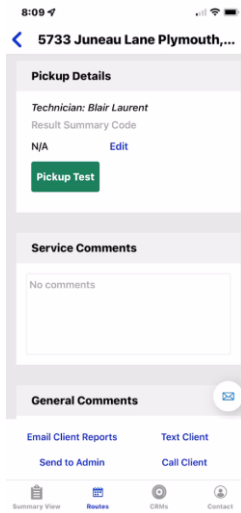
- e. Technician returns to the route screen and receives a Check Mark indicating the appointment is complete. The summary view also shows the appointment completed check mark



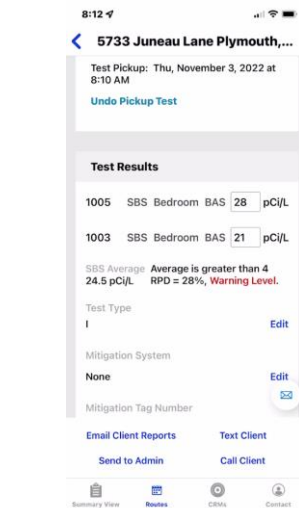
- f. The Pickup – Use the navigations tools to advance by day to the pickup appointment



- g. The Technician selects “Pickup Test”

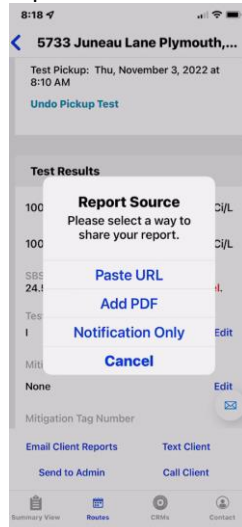


- i. The technician reads the crm and save the report pdf to their phone
ii. The technician enters the test results and sets the mitigation type. If it is a SBS the Relative Percent Difference (RPD) is displayed. The technician or administrator needs to determine if special action/comments are required.

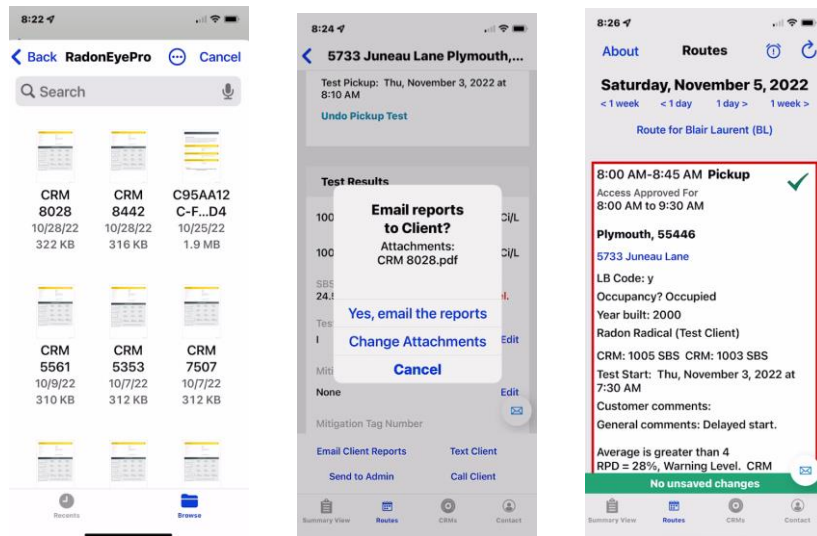


ATTENTION: If your organization is using the Homebase Report Generator the following does not apply. See the specific instructions for the report generator.

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

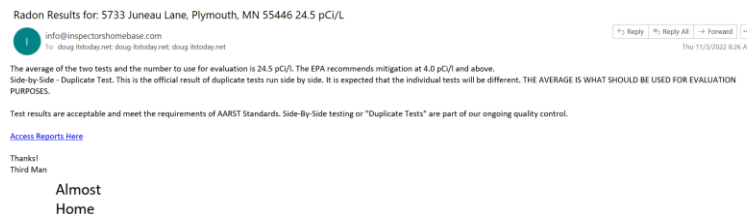


- iv. Tech selects “Add PDF” , inserts the crm report pdf from the phone and then confirms emailing the report and returns to the route screen to receive the completed stop check mark

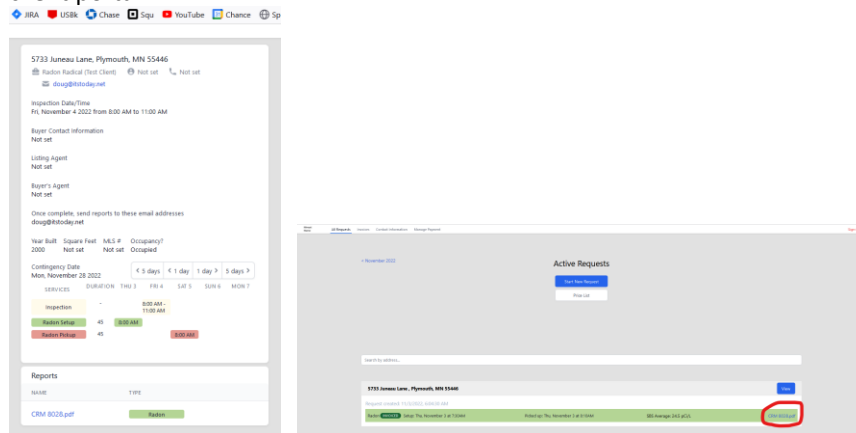


14. When the report is sent the client receives an email with the test results and a link to the report and the report is uploaded to Homebase.

a. Client Email

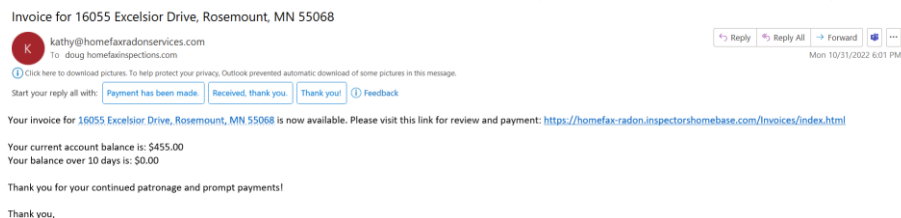


i. The report link takes them to the report in the public view or they can view it in their client portal



15. Invoices and payments: Once the report is sent the order moves to the invoiced state.

a. 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.



All Requests **Invoices** Contact Information Manage Payment

Search by address...

Invoice credit: \$0.00 [View Credit Log](#)
 This credit will automatically be applied to the next invoices you pay; a negative value means that your next invoices will be discounted by the displayed amount.

Report Date	Test Address	Report	Amount	Invoice	Selected for payment
Radon: 10/31/2022	16055 Excelsior Drive, Rosemount, MN 55068	View	\$65.00	View	<input type="checkbox"/>
Radon: 10/27/2022	2223 Buffalo Street, White Bear Twp, MN 55110	View	\$65.00	View	<input type="checkbox"/>
Radon: 10/24/2022	4354 19th Avenue South, Minneapolis, MN 55407	View	\$65.00	View	<input type="checkbox"/>
Radon: 10/20/2022	16641 Franchise Avenue West, Rosemount, MN 55068	View	\$65.00	View	<input type="checkbox"/>
Radon: 10/15/2022	2220 Cedar Lane, Mound, MN 55364	View	\$65.00	View	<input type="checkbox"/>
Radon: 10/13/2022	13504 Tyler Street Northwest, Elk River, MN 55330	View	\$65.00	View	<input type="checkbox"/>
Radon: 10/7/2022	6118 Creek Ridge Court, Minnetonka, MN 55345	View	\$65.00	View	<input type="checkbox"/>
			\$0.00		

Need help paying invoices? Here's a video from HomeSafe founder Doug Larson walking you through the process.

[Pay With Card](#) A 3% Convenience Fee will be added to the invoice amounts at checkout
[Pay With ACH](#) NO FEE
[Pay With Check](#) NO FEE

b. Admin can view the invoice by navigating to the invoice tab

All Requests **Invoices** Clients Users & Services Reports Radon Report Settings Manage Contact Information

Unpaid Invoices

Pending Payment	Total unpaid	Unpaid over 20 days	Unpaid over 30 days
\$0.00 (0 requests)	\$730.00 (2 requests)	\$595.00 (2 requests)	\$595.00 (2 requests)

Search client name or address...

Client	Report Date	Test Address	Report	Amount	Invoice
Almost Home #1 Client Send statement Never sent	Radon: 6/3/2022	9074 94th Ave N, Maple Grove, MN 55369		\$460.00	View
Almost Home #1 Client	Radon: 4/7/2022	5729 Juneau, Plymouth, MN 55446	View	\$135.00	View
Radon Radcal (Test Client) Send statement Never sent	Radon: 11/3/2022	5733 Juneau Lane, Plymouth, MN 55446	View	\$135.00	View