## Introduction to the "Users & Services" Tab



## Users:

There are three types of users:

- 1) Administrator "Admin"
- 2) Technicians
- 3) Clients

The Administrator is created when the Homebase account is setup. Technicians and Clients are "invited" to sign-up for their account by the Administrator. The process is the same for both, but they are in separate sections.

Navigate to the "Users & Services" page. Click anywhere along the bar to open the sections

All Requests Calendar Invoice	es CRMs Users & Services Reports Radon Report Servings Manage Contact Information Help Libra-	
	Please note: if you're integrated with Spectora, ISN, or Nxt Inspekt orders entered in those systems prior to enabling your services in neurobase may not be created in For example, if you offer Chinney insections as a service in Spectora, but don't yet have it enabled in Homebase. Spectora inspections with China e will not automat Homebase.	
	Invite Technicians	~
	Invite Clients	~
	Pending Invitations (0)	~
	All Technicians (11)	~
	All Clients (1)	~
	Radon Enabled	~
	Water Enabled	~
	Sewer Enabled	~
	Chimney Enabled	~
	Intrusive Moisture Disabled	~
	Wood Foundation Disabled	~
	Mold Testing Disabled	~
	Aerial Roof Inspection Disabled	~

## Invite Technicians: Click the gray bar at "Invite Technicians"

Complete the information and select "Invite Technician"

Usernames can be anything, but need to be unique and CANNOT be changed.

The Technicians Initials are displayed at the top of the calendar column. These can be change by the Technician or Administrator later in the Technicians Contact Screen

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		Radon/Water						
	DL	KL	L					
8 AM (-)		CRMs not in CRM 0 (-)	use CRM 1 (3)					
0 AW ( )				1				
9 AM (-)			Plymouth Lakeland Hom RLA INV Albertville Harmony Hom	1				
10 AM (-)			Harmony Hom A I R I A Minneapolis MNPro Home	5				
Invite Technicians								^
Initials								
Initials								
Email Address								
Email address								
Username					Temporary Password			
Username					Temporary Password			
Invite Technician								
Once submitted	the Tec	hnician	receive	s the ema	il shown below			
Your ISN Test Co	ompany tem	iporary pas	sword - Me	essage (HTML)	,O Search	$\bigcirc$	_	×

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Delete	Respond	Quick Steps	Move				Language	Zoom	
	Company temp				© ∽ R	eply 🖔 Re	eply All →	Forward	
	pectorshomebase.c stoday.net; doug itstod			(					

<u>company.inspectorshomebase.com/signin.html</u> to get started. \*For the best experience, please use Chrome, Firefox, Edge, or Safari. Internet Explorer is not currently supported.

The technician follows the link and enters the information from the email and then enters their own new password. (They are allowed to use the same password from the email if they want.)

Company Key	(case sensitive)	Company Key	(case sensitive
isn-test-company		isn-test-company	
Username	(case sensitive)	Username	(case sensitive
Alpha Bet		Alpha Bet	
Password	(case sensitive)	Password	(case sensitive
•••••	O	•••••	Ο
Sut	omit	New Password	(case sensitive
		Password	Ο
Forgot F	Password	Diagon cot a new po	serverd for this
		Please set a new pa account	issword for this
			omit

The technician then completes their contact information: Note:

- Initials can be changed (Obviously you do not want to have two techs with the same initials.)
- Associated ISN User. If your organization is integrating with ISN, technicians that have an ISN Username can select their ISN account so that appointments from Homebase migrate to their ISN Calendar.
- Assigned services. Technician selects the services they will be performing. They will get a column on the calendar for each service.
- License or Certification is used if you are using the Radon Report Generator. This information is included in the radon report

	<b>Testing Comp</b>	any Information
Company: Phone: Address:	ISN Test Company 612-555-5555 1234 ISN Street, Plymouth, N	IN 55446
	Setup Pr	ofessional
Name: Title: Number: Expiration Date:	INS1 Tech1 Radon Measurement Profest RMEA-0999 12/31/22	ional
	Pickup Pi	ofessional
Name: Title: Number: Expiration Date:	INS1 Tech1 Radon Measurement Profest RMEA-0999 12/31/22	ional
This Report is Cer	tified By:	
INSI Tech	11	Date: 1/9/23. 9:03 AM

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3etore you get started, pleas	se provide your contact information
Basic Information	
Alpha	Bet
612-555-5555	
doug@itstoday.net	
Separate multiple addresses with a se	emicolon: test@example.com; john@example.com; etc.
Technician Details	
ZXY	
	an ISN user will let Homebase schedule and update radon hen they're changed in Homebase.
Assigned To Services	r 🗌 Chimney
Assigned To Services     Image: Service of the service o	r 🗌 Chimney
appointments automatically in ISN w Assigned To Services Radon Water Sewe License or Certification Title License or Certification Number	r 🗌 Chimney

Google Calendar Sync - If activated, ٠ Homebase Calendar Appointments will be posted to technician's Google calendar. And Google appointments will appear on their Homebase calendar. (Note: If you have an *ISN account posting to your google calendar* and you have you Homebase account connected to your ISN account, do not connect here. You will get doubled up appointments)

		CRMs not in		Г
M (29)	1617 129th Avenue	CRM 0 (-)	CRM 3 (6)	
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M (26)	55449		Eden Prairie Pro-Inspector, A.T.R.T.A.T.C.F	ł
M (26)				
on (26	Doctors appointment	)		
M (26)		1		

lailing Address	with Google	
Address Line 1*		
Address Line 2		
City*	State*	Zip*
Send email not		
Share setup/pi Send the repor	rt to the Buyer's email address a assigned to my account	addresses in "Send reports To" field nd phone number

- Technicians should ignore boxes 3,4 and 5. •
- Box 6 is used if your organization is going to keep track of the CRMs. This is REQUIRED if you • want an accurate Chain of Custody.

download. All Requests Calendar CRMs Radon Report Settings Manage Contact Information Help Library < January 2023 **Active Requests** rt New Request Price L Technician's App - Inspector's Link 0 Download the phone app, Inspector's Link, here. Email everyone Download on the App Store Google Play Search client name or address... In-House Client - 917AM October 12 , Tulsa, OK 74114 Request created: 10/12/2022, 9:26:16 AM (ISN Order #234)

Finally, select "Save Changes"

The technician will be taken to this screen. Here they can select which phone app to

**Invite Clients:** Note: If you are integrating with ISN, Spectora or Nxt Inspekt, and you intend to have all your invoicing and main scheduling handled by those systems, you will not use "Invite Clients". **If you** are using Homebase for your primary scheduler, order entry and invoicing you will invite your repeat open account clients as follows. (Retail clients will use the standard "Retail Clients" Link. They do not need to be invited.)

Complete the form and select "Invite Client". Once the invite is sent, username cannot be changed.

Invite Clients	^
Client Business	
Dave's Inspection Services	
Email Address	
doug@itstoday.net	
Username	Temporary Password
Daves	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
Invite Client	

Once sent, your client will receive this email with their username, password and link to sign in.

File       Message       Help       Foxti PDF         Image: September of the september of t	Your ISN Test	Company temporary pass	vord - Message (HT	ML)	Search				⊕ –	۲	$\times$
Window tot. 1:       To Monager         Your ISN Test Company temporary password         Info@inspectorshomebase.com         To doug itstoday.net         Your ISN Test Company company key is isn-test-company, your username is Daves, and your temporary password is xxxxxxxxx. Please visit <a href="https://isn-test-company.inspectorshomebase.com/signin.html">https://isn-test-company.inspectorshomebase.com</a>	File Message	Help Foxit PDF									
Your ISN Test Company temporary password To doug itstoday.net: doug itstoday.net: Your ISN Test Company company key is isn-test-company, your username is Daves, and your temporary password is xxxxxxxxx. Please visit <u>https://isn-test-</u> <u>company.inspectorshomebase.com/signin.html</u> to get started. *For the best experience,		ve Reply All	ightarrow To Manager	- Mov	e 💵		5	(Immersive	a 🛪	Zoom	
info@inspectorshomebase.com       Image: Standay.net         To       doug itstoday.net         Your ISN Test Company company key is isn-test-company, your username is Daves, and your temporary password is xxxxxxxxx. Please visit <a href="https://isn-test-company.inspectorshomebase.com/signin.html">https://isn-test-company.inspectorshomebase.com/signin.html</a> to get started. *For the best experience,	Delete	Respond	Quick Steps	N	Nove				Language	Zoom	~
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The link takes them here, where they enter their credentials and choose a new password

Username	
Password	(case sensitive
Password	O

Company Key (case sensitive) isn-test-company Username (case sensitive) Daves (case sensitive) Password Ο ..... New Password (case sensitive) Password Ο Please set a new password for this account Forgot Password 2

Here they enter info from the email

Here they Enter their desired new password

They are then asked to complete their contact information

The radon Report logo only needs to be uploaded if they want their logo at the top of the radon report



Clients can choose to have their company name and logo on the report or they can leave that area blank

## **Notifications Options:**

Clients can choose the types of Notifications they receive:

- 1) Clients can choose to receive text and/or email notifications
- 2) "Send me a setup notification for all requests." This email goes out when the scheduler enters the lock box code in the work order. The email indicates the day and time the setup or pickup is scheduled.

info@inspectorshomebase.com	٥	S Reply	Septy All	→ Forward	
To doug homefaxinspections.com				Thu 12/22/20	22 5:37 A
The Radon test at 5555 Juneau Lane, Plymouth,	, MN 55446 is s	chedul	ed to be p	icked up	on
Saturday, December 24 at 11:15 AM.					
Sataraay, Beeenber 24 at 11.15 / IVI					
			10	1 <b>/</b> 1 <b>:</b> + 1-	<u>دا</u>
Here is a link to your request: https://dougs-tes		mebas	e.com/Orc	ler/edit.h	tml?
		mebas	e.com/Ord	der/edit.h	<u>tml?</u>
Here is a link to your request: https://dougs-tes		mebasi	e.com/Orc	<u>der/edit.h</u>	<u>tml?</u>
Here is a link to your request: <u>https://dougs-tes</u> id=2022-12-17-729D8D96-A915-89B4-FBA7-77		mebas	e.com/Orc	<u>ler/edit.h</u>	<u>tml?</u>

- "Share setup/pickup notification with all email addresses in "Send reports To" field" When ordering, clients can add email addresses to be included when the report is sent. If checked, those emails will be included in the notification in number 2 above, "Send me a setup notification for all requests."
- 4) "Send the report to the Buyer's email address and phone number". If selected, client's buyers will always receive the report. The client does not need to enter it into the order form.

Inspection Service Request *means the is a required Sed	
Assign to user * In-House Client	
Inspection Details	Contingency Date
Inspection Date Start Time End Time	
Contringency Date	
Once complete, send reports to these enail addresses	Once complete, send reports to these email addresses
kattydihanetaisadonsenias.com	kathy@homefaxradonservices.com
Comments	Contracts multiple addresses with a semicolon: test@example.com; john@example.com; etc.
	Comments
Services Requested	
Radon Same time as inspection View Product Description	
Nadon wine wine as inspection view movies people with	

Basic Information				
First Name*			Last Name*	
Phone Number*				
doug@itstoday.	net			
Separate multiple ad	dresses with a	semicolon: test	@example.com; joh	nn@example.com; etc.
Mailing Address				
Address Line 1*				
Address Line 2				
City*				
Radon Report Log	lo	State*		Zip*
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5) "Send the Buyer text and email notifications each day at 8AM central until the buyer's inspection agreement is signed, up to a maximum of 5 times." Only used if you are requiring buyers to sign an inspection agreement for ancillary services. (The option to require buyers to sign an ancillary services agreement is set up in the "Manage" tab.)