

## Introduction to the “Users & Services” Tab

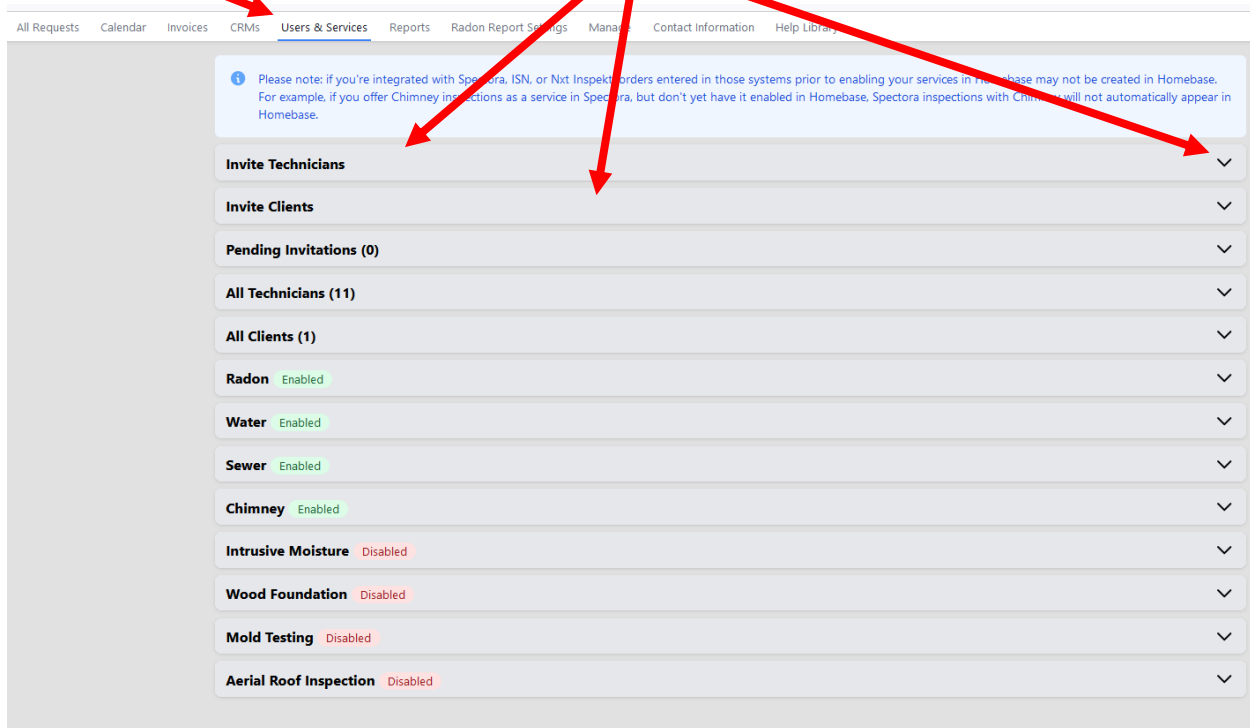
### Users:

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



The screenshot shows the Homebase interface with the "Users & Services" tab selected in the top navigation bar. A blue information banner at the top provides a note about service integration. Below the banner is a list of sections, each with a dropdown arrow on the right. Red arrows point from the text above to the "Users & Services" tab, the "Invite Technicians" section, the "Invite Clients" section, and the "Aerial Roof Inspection" section.

All Requests | Calendar | Invoices | CRMS | **Users & Services** | Reports | Radon Report Settings | Manage | Contact Information | Help Library

**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 ▼

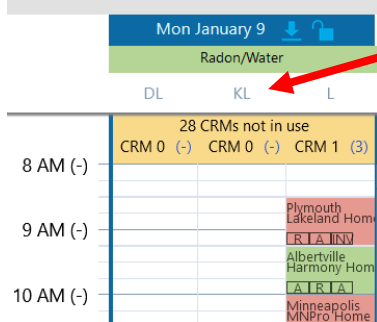
**Aerial Roof Inspection** Disabled ▼

**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



**Invite Technicians**

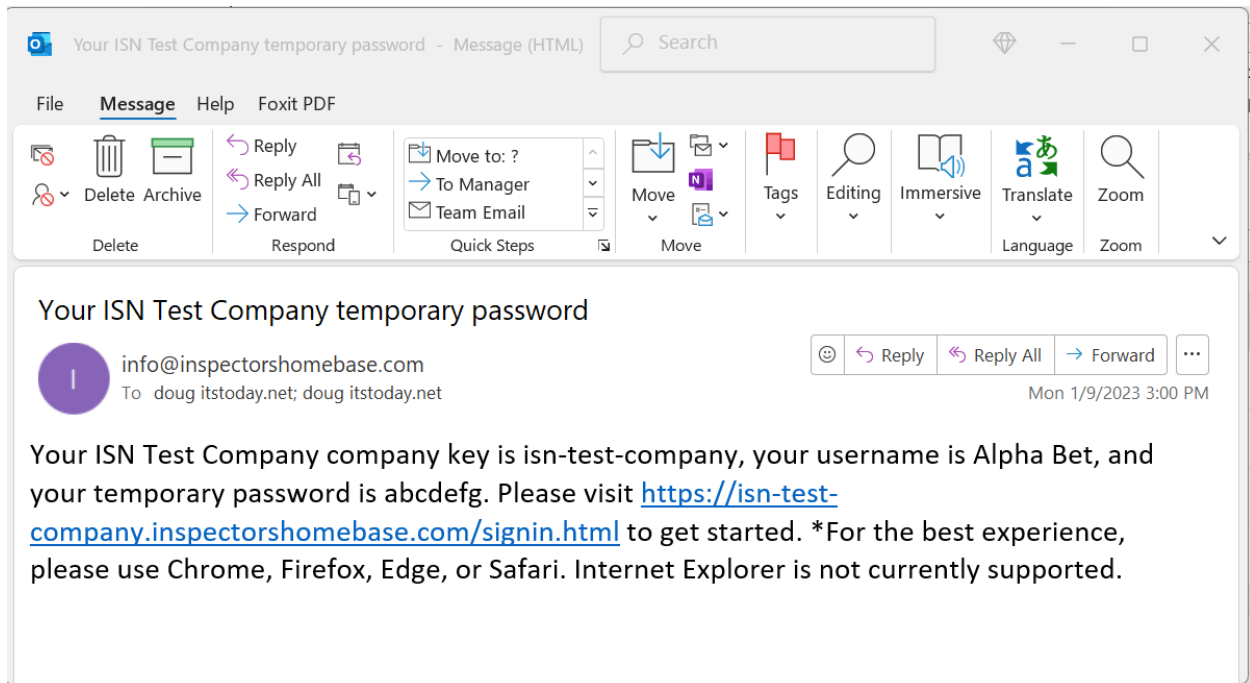
Initials

Email Address

Username

Temporary Password

Once submitted the Technician receives the email shown below



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.)

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

Testing Company Information	
Company:	ISN Test Company
Phone:	612-555-5555
Address:	1234 ISN Street, Plymouth, MN 55446
Setup Professional	
Name:	INS1 Tech1
Title:	Radon Measurement Professional
Number:	RMEA-0999
Expiration Date:	12/31/22
Pickup Professional	
Name:	INS1 Tech1
Title:	Radon Measurement Professional
Number:	RMEA-0999
Expiration Date:	12/31/22
This Report is Certified By:	
<i>INS1 Tech1</i>	
Date: 1/9/23, 9:03 AM	
INS1 Tech1 * RMEA-0999 * 12/31/22	

**Technician (Username: Alpha Bet)**

Before you get started, please provide your contact information

Basic Information

Alpha Bet

612-555-5555

doug@itstoday.net

Separate multiple addresses with a semicolon: test@example.com; john@example.com; etc.

Technician Details

ZXY

Associated ISN User

None

Associating this Homebase user with an ISN user will let Homebase schedule and update radon appointments automatically in ISN when they're changed in Homebase.

Assigned To Services

Radon  Water  Sewer  Chimney

License or Certification Title

License or Certification Number

License or Certification Expiration Date

- Google Calendar Sync - If activated, 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)*

Day	Date	Event
M (29)	11/29/2022	Homebase
M (30)	11/30/2022	Homebase
M (26)	11/26/2022	Homebase
M (26)	11/26/2022	Homebase
M (26)	11/26/2022	Homebase
M (26)	11/26/2022	Doctors appointment
M (26)	11/26/2022	Homebase

- 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.

Finally, select "Save Changes"

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

Connect to Google Calendar

Sign in with Google

Mailing Address

Address Line 1\*

Address Line 2

City\* State\* Zip\*

Notifications

Send text message notifications

Send email notifications

Send me a setup notification for all requests

Share setup/pickup notification with all email addresses in "Send reports To" field

Send the report to the Buyer's email address and phone number

CRMs can be assigned to my account

\* = required field

Save Changes

All Requests | Calendar | Invoices | CRMs | User Services | Reports | Radon Report Settings | Manage | Contact Information | Help Library

< January 2023

### Active Requests

[Start New Request](#)

[Price List](#)

Email everyone

**Technician's App - Inspector's Link**  
Download the phone app, Inspector's Link, here.

Download on the App Store | GET IT ON Google Play

Search client name or address...

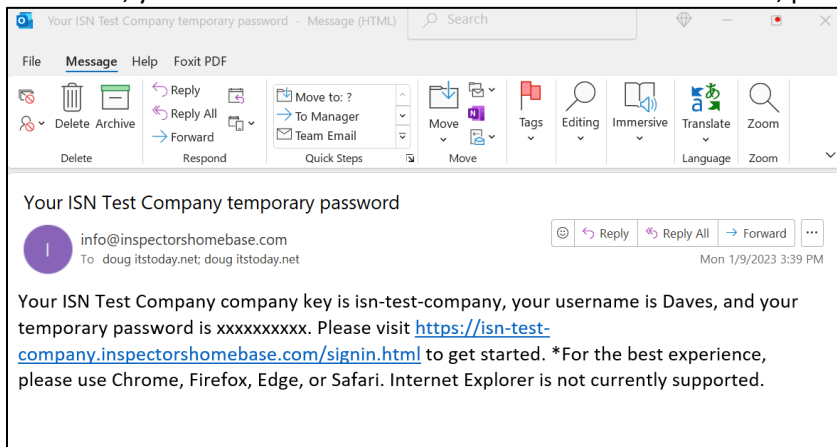
**In-House Client - 917AM October 12 , Tulsa, OK 74114** [View](#)

Request created: 10/12/2022, 9:26:16 AM [ISN Order #234](#)

**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.

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



The link takes them here, where they enter their credentials and choose a new password

1

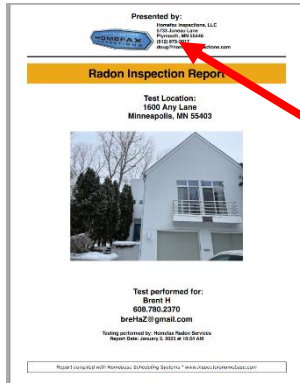
Here they enter info from the email

2

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

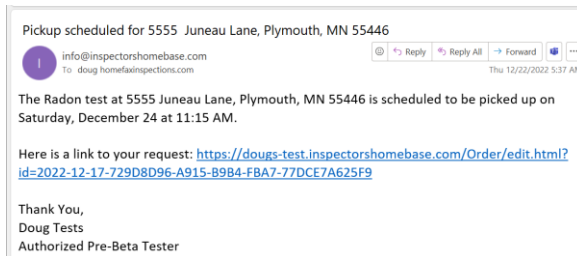


Clients can choose to have their company name and logo on the report or they can leave that area blank

### 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.
- 3) "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.



- 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.)