Nationwide Virtual Site Inspection
User Guide
for
Virtual Inspectors and Assistant

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- Branch Office Inspection
- Disaster Inspection
- Loss Draft
- Merchant
- Photo Inspection

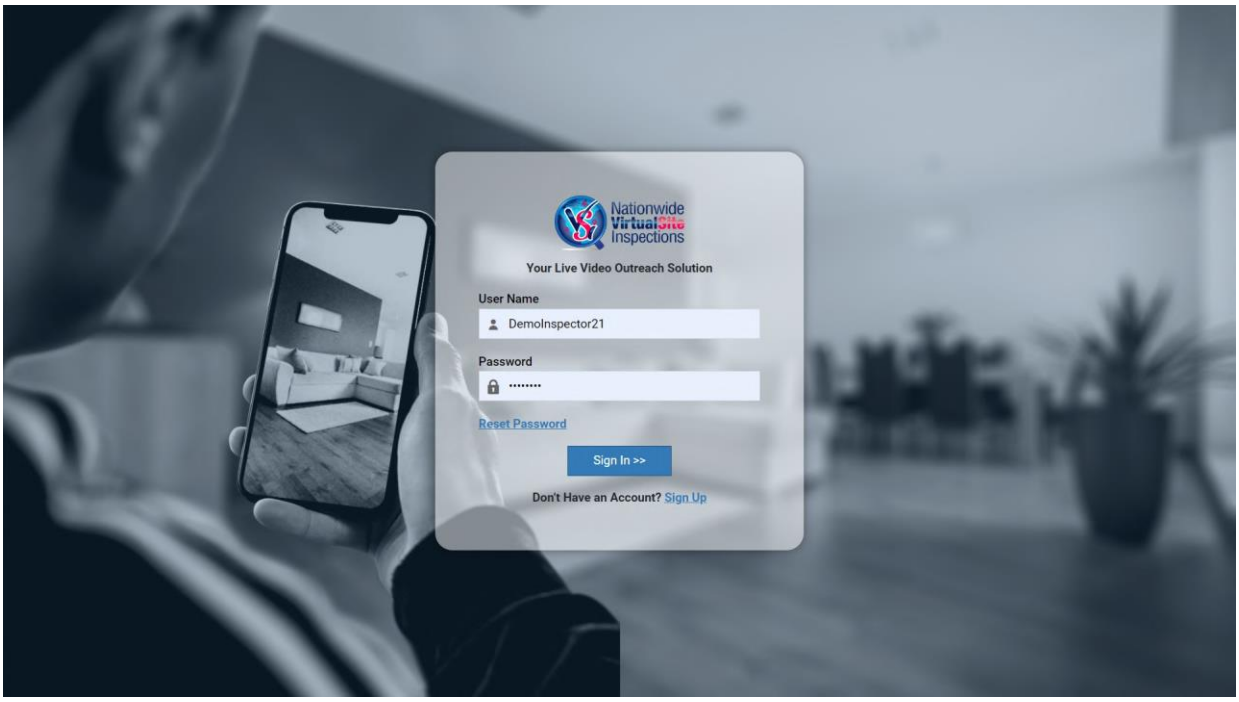
Photo CheckList:

- Branch Office Inspection
- Disaster Inspection
- Loss Draft
- Merchant
- Photo Inspection

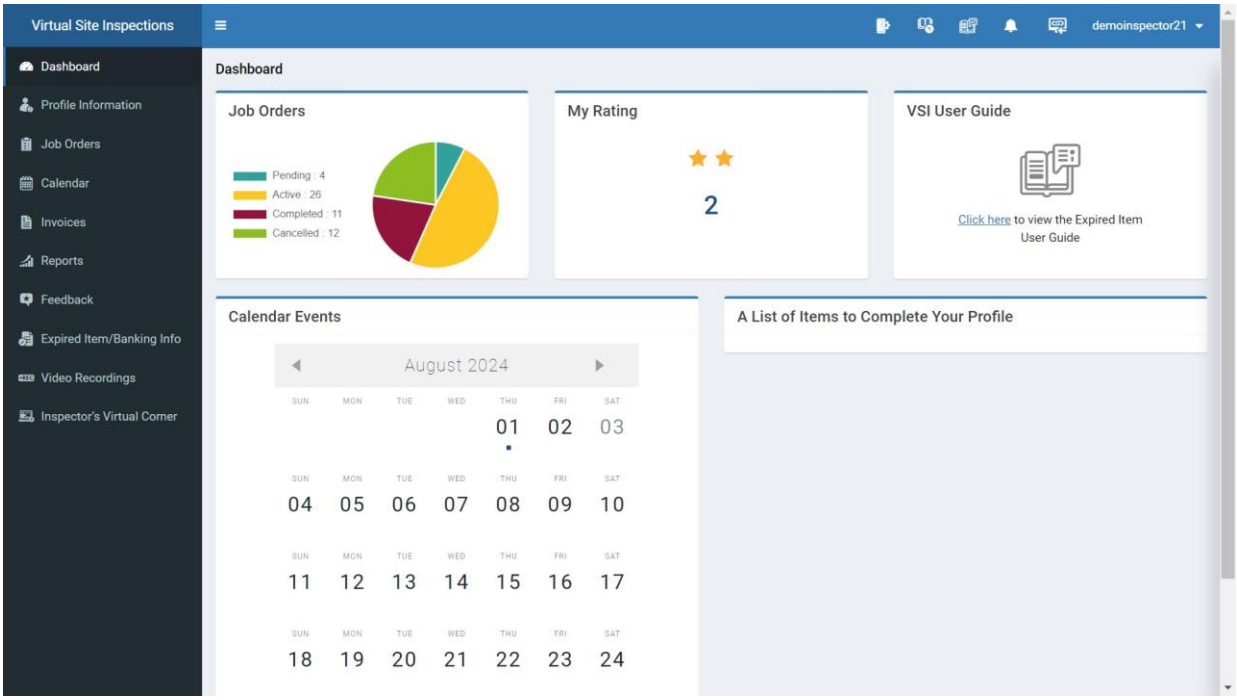
Log In

Get yourself registered on the Nationwide Virtual Site portal and create secure log-in credentials. Now, all you need to do is simply log in using your user name and password that you would have generated at the time of signing up.

Once you are logged in, you will land on the Dashboard of the portal. This is a home page of

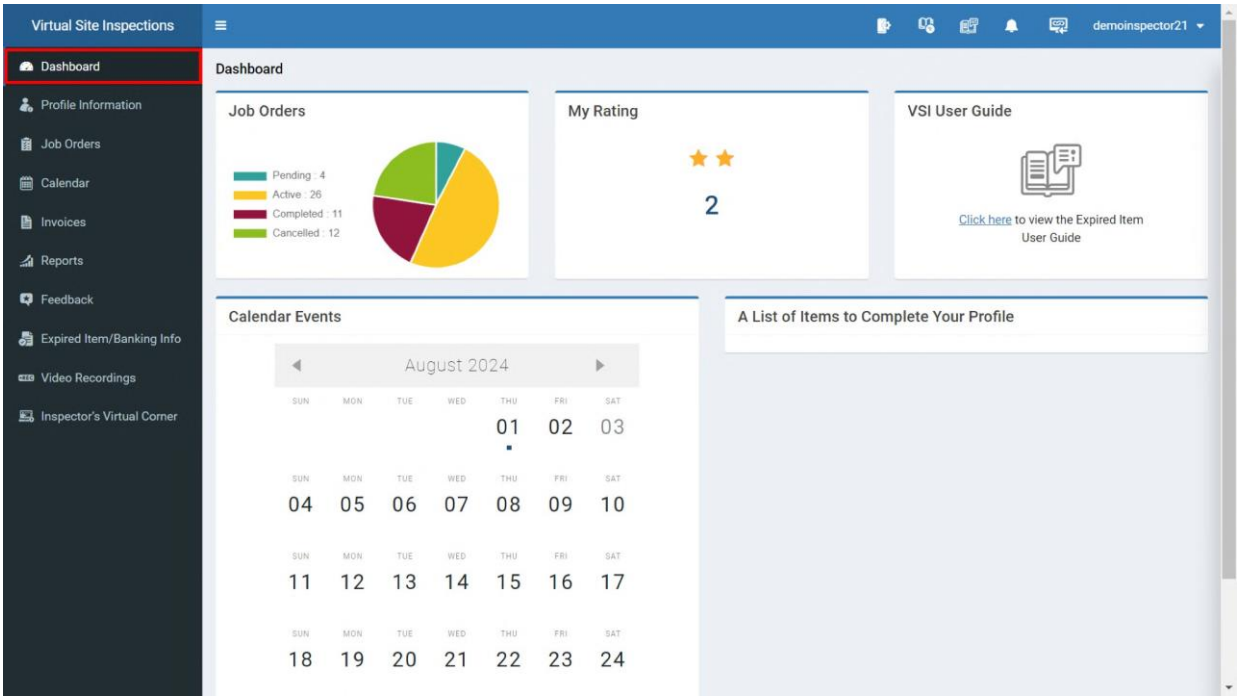


the portal that shows all the statistics in a visually appealing way. You will find the summary of the orders of property inspections in various forms like the analysis of job order status, a list of top 10 clients, regional-based order details, a list of category-based job orders, a list of job order tags, and a scheduling calendar. The calendar shows all the scheduled property inspections that can be scheduled immediately or in the future.



Dashboard

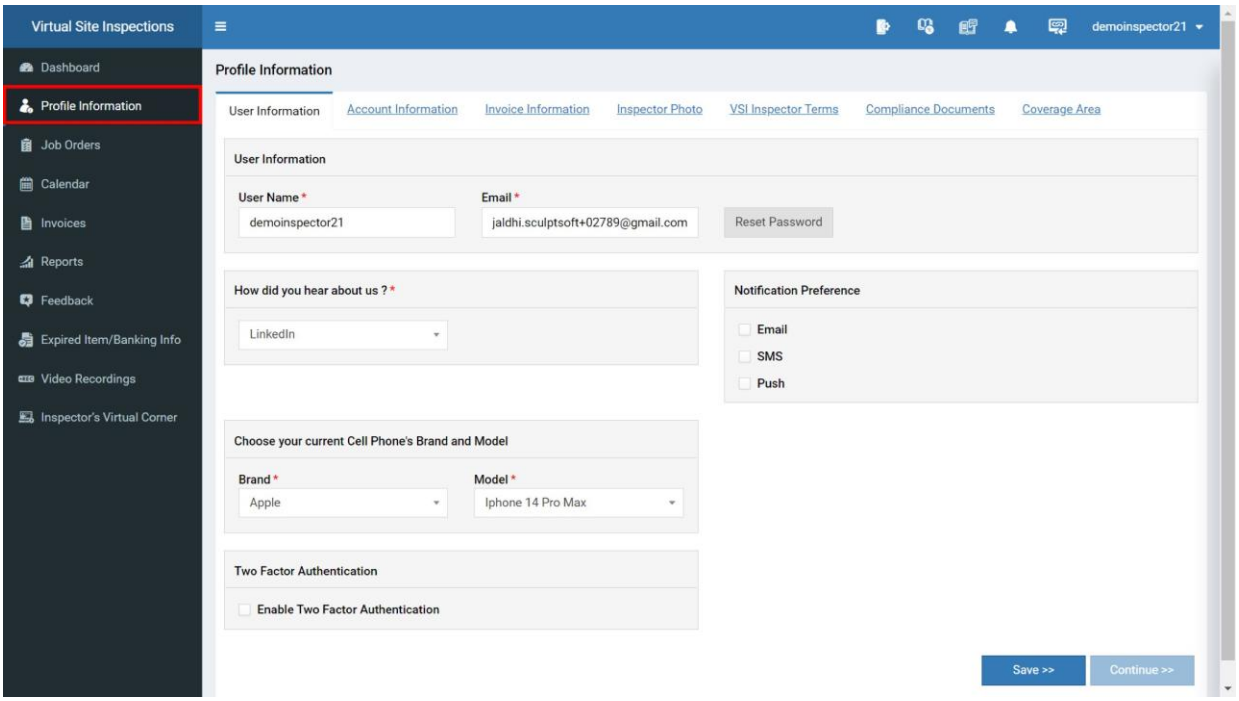
The dashboard of the inspector's portal shows a quick picture of important things like Job Orders, and how users are rated when they're logged in. It also gives easy access to the VSI App user guide. To help with planning and keeping track of tasks, there's a calendar. You also get a checklist to finish your user profile, and it shows you when important things are about to expire. The screenshot below gives a good look at all the useful features on the dashboard.



Profile Information

To view and update your user profile, simply click on the 'Profile Information' tab located on the left side of the screen. This action will redirect you to a new page, where you can make any necessary changes to your profile.

To easily find your information, the portal has different tabs like "User Information", "Account Information", "Invoice Information", "Inspector Photo", "VSI Inspector Terms", "Compliance Document" and "Coverage Area". Just click on the tab you need, and it will take you to that part where you can manage those specific details.

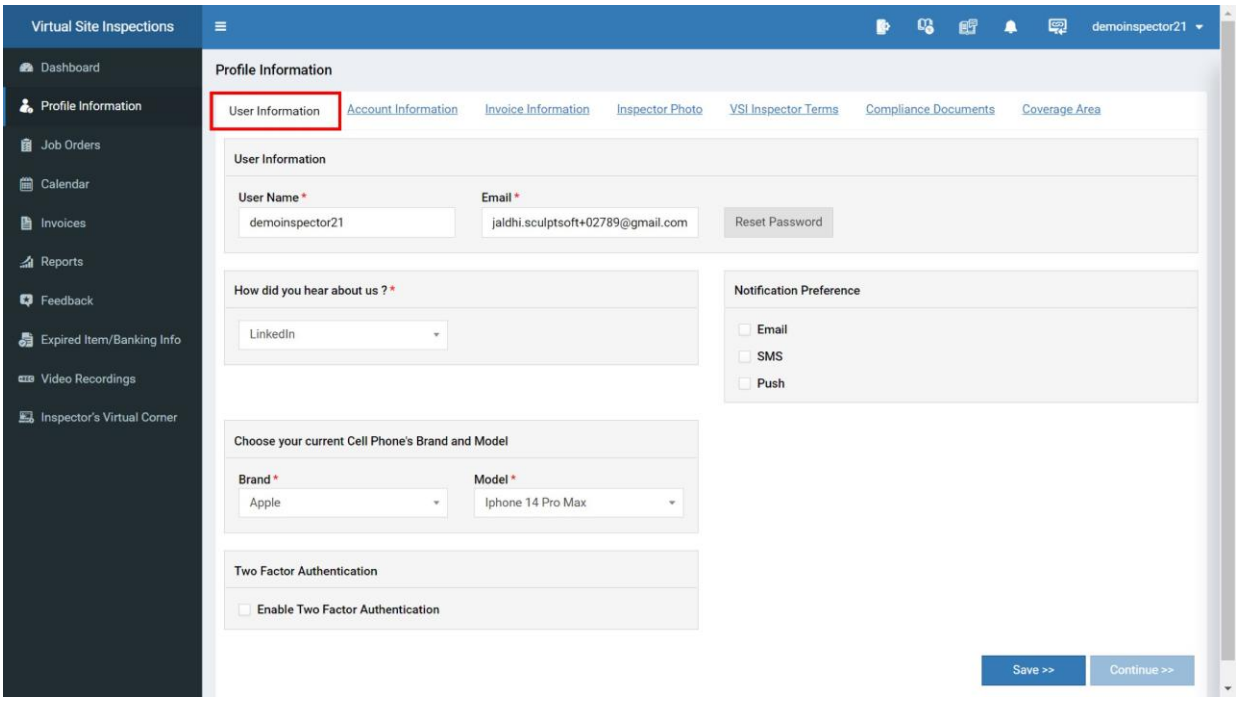


a) User Information Tab

In the 'User Information' section, you can check the details like your User Name, Password, and how you heard about us. There are different options for that, like Facebook, LinkedIn, other social media, referral, search engine, and email marketing, and you can choose one of them.

You also get to choose how you want to get notifications: by email, SMS, or push. The kind of notifications you get will depend on what you pick. Additionally , you can find details about the brand and model of your cell phone right below.

Choose your current cell phone's brand and model in that section. It displays two dropdowns for brand and model selection.



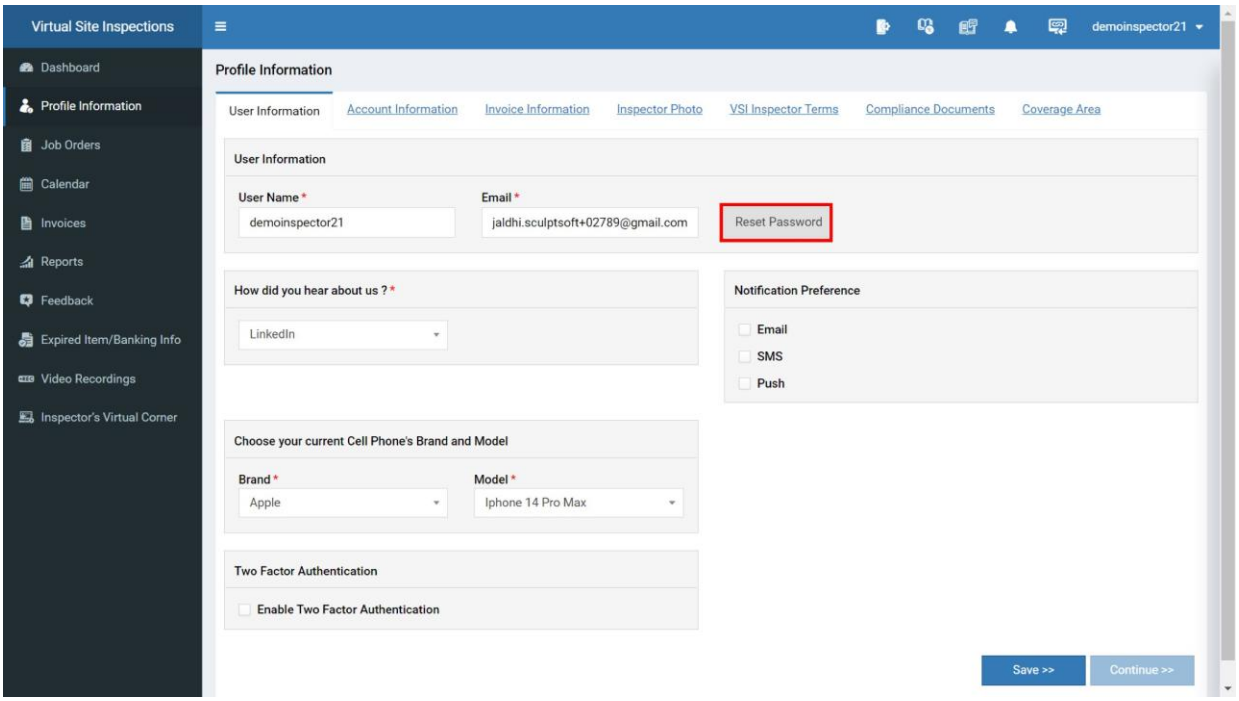
To enhance security, there is a two-factor authentication section where you can establish your password using OTP (One-Time Password).

Password: The initial factor is the conventional password you have set for your account.
Mobile OTP: The second factor involves a time-sensitive, unique code sent to your mobile device. After entering your password, you will receive a one-time code on your mobile through SMS.

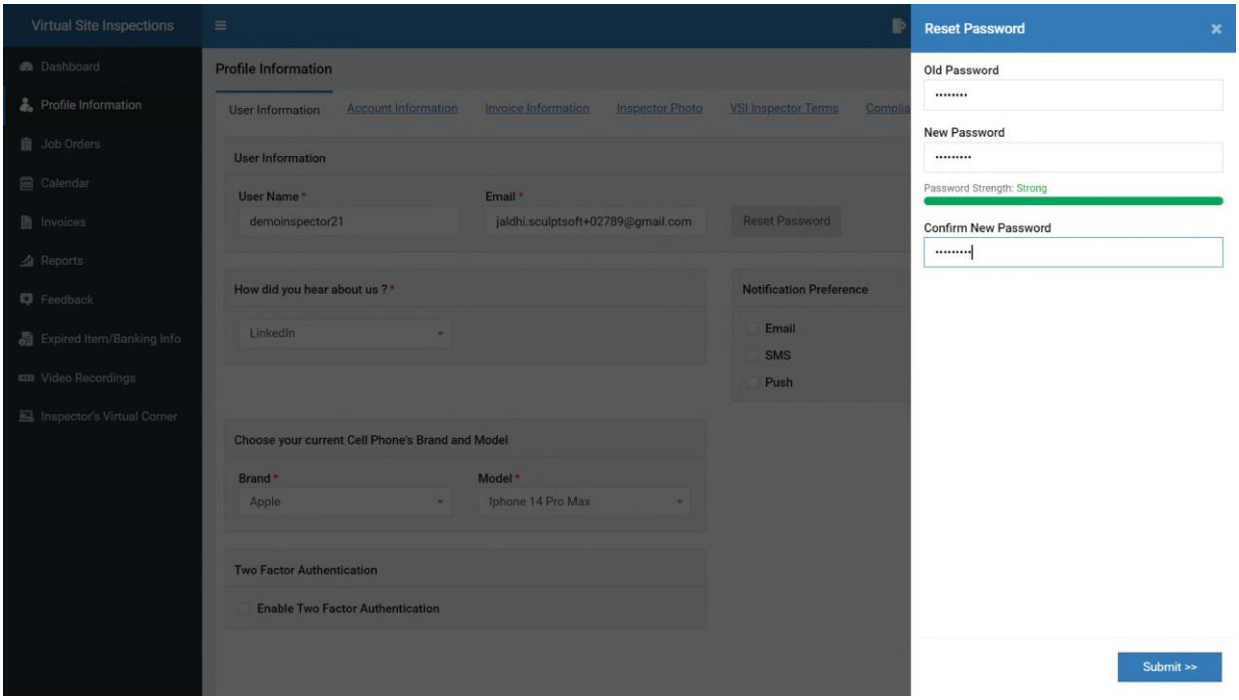
To activate or deactivate two-factor authentication, simply mark or unmark the 'Enable Two-Factor Authentication' checkbox.

If two-factor authentication is enabled, after clicking 'login' and entering your current password during the initial login, you will be automatically redirected to the OTP (One-Time Password) screen. This screen serves as a verification step, prompting you to enter the OTP sent to your registered cellphone number in your profile.

To reset your password, click on the 'Reset Password' button.



After clicking, a sidebar will open. In this sidebar, enter your current password and the new password you want to set. Below the new password, you'll see an indication of your password strength.

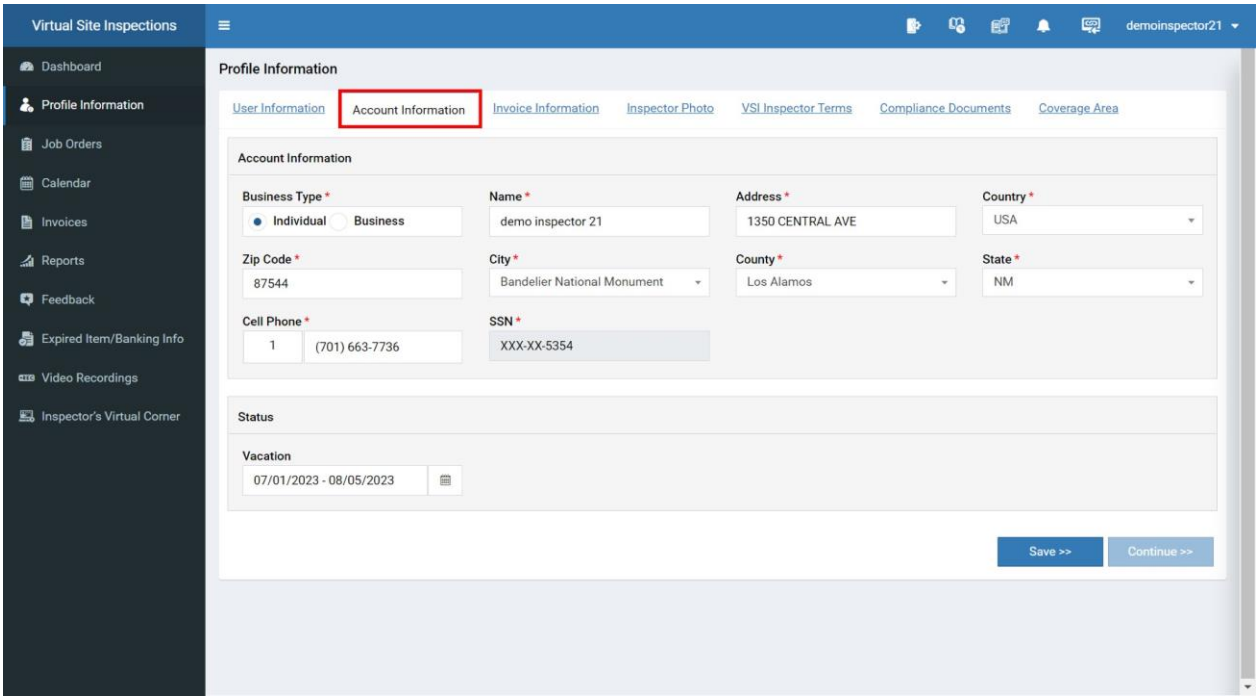


To save the changes made in the User Information tab, please click on the 'Save' button. The Save button will store all the modifications on the server. Afterward, click on the 'Continue >>' button to proceed to the next tab. This process ensures that the changes are successfully saved before moving to the next section.

b) Account Information Tab

Clicking the 'Account Information' tab opens a new section that contains four different sub-sections: Account Information, Status. This section provides an overview of your account details, current status.

The Account Information section is where you will find your personal details, including your name, address, cell phone number, and Social Security Number (SSN). Depending on whether you select 'Individual' or 'Business' as your business type, the corresponding fields will be displayed. If you choose 'Individual' you will see the SSN field, but if you select 'Business' you will see the new field Company Name and Tax ID fields instead of the SSN.

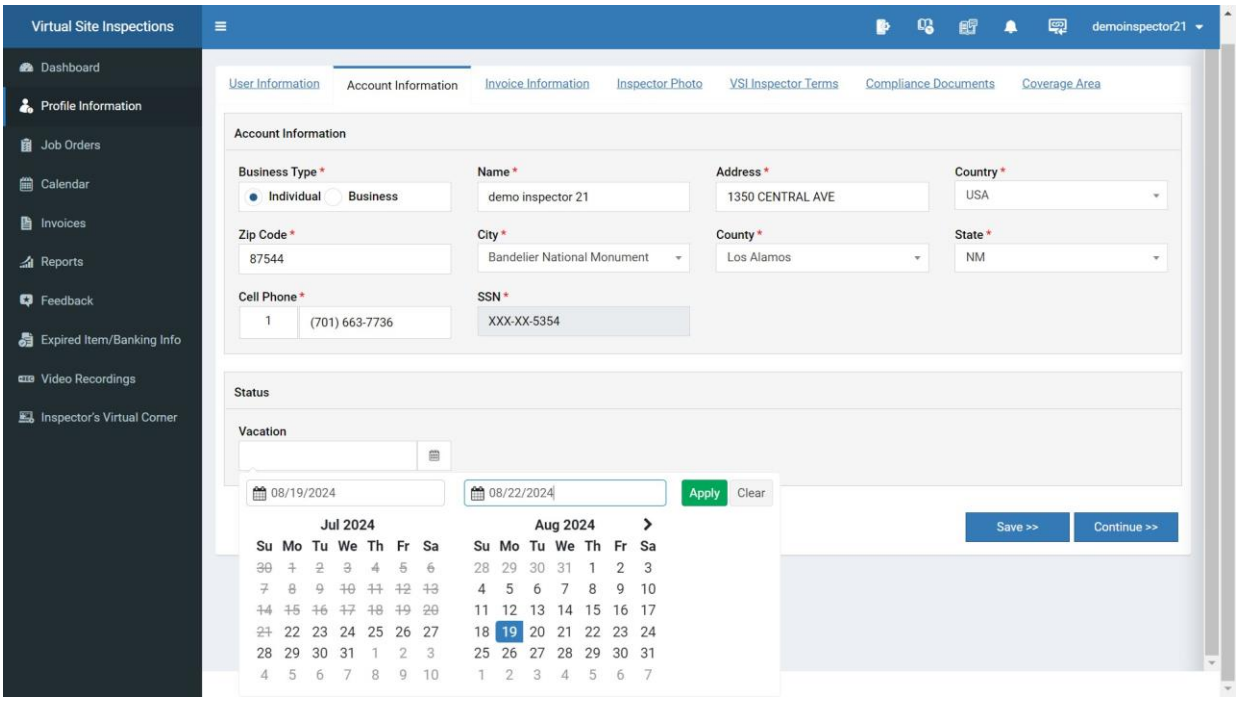


How to Place Yourself on Vacation

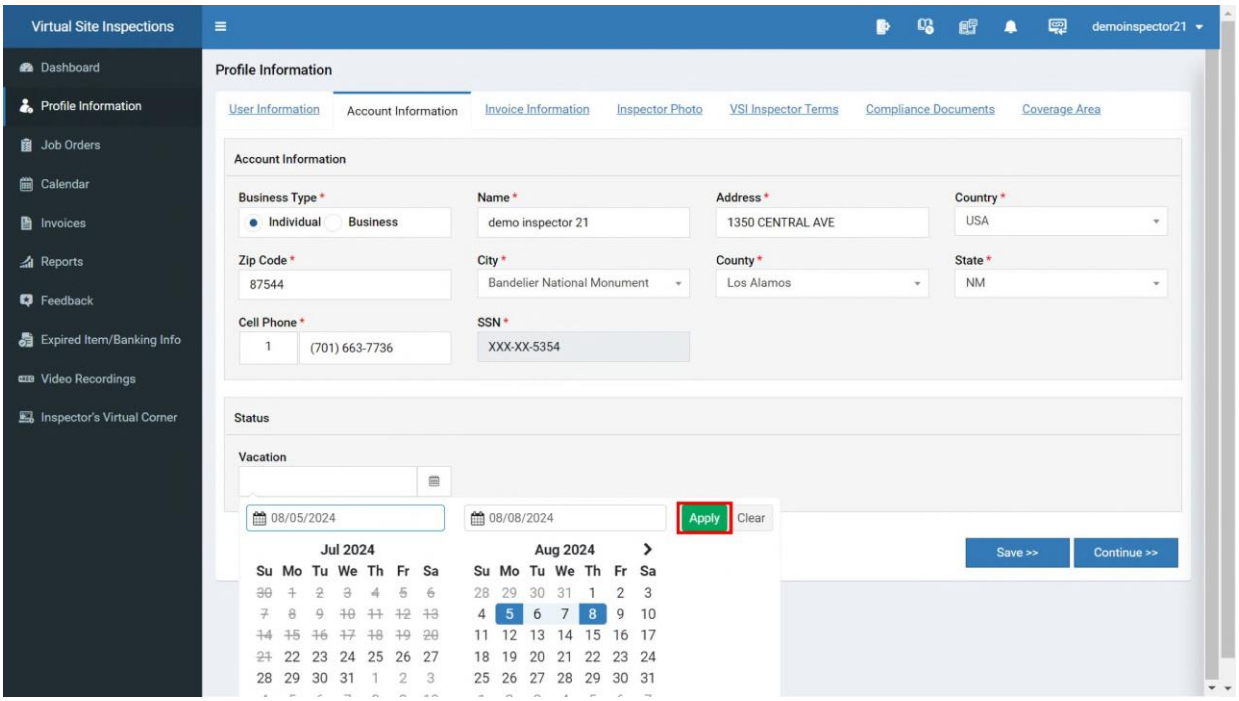
In the status section, there's a specific field labeled "Vacation Date" where inspectors can indicate their vacation plans by entering the start and end dates of their time off. Once these dates are set, the system automatically moves that the inspector is on vacation status.

When the vacation period ends, the system automatically moves the inspector's status back to "Active" status.

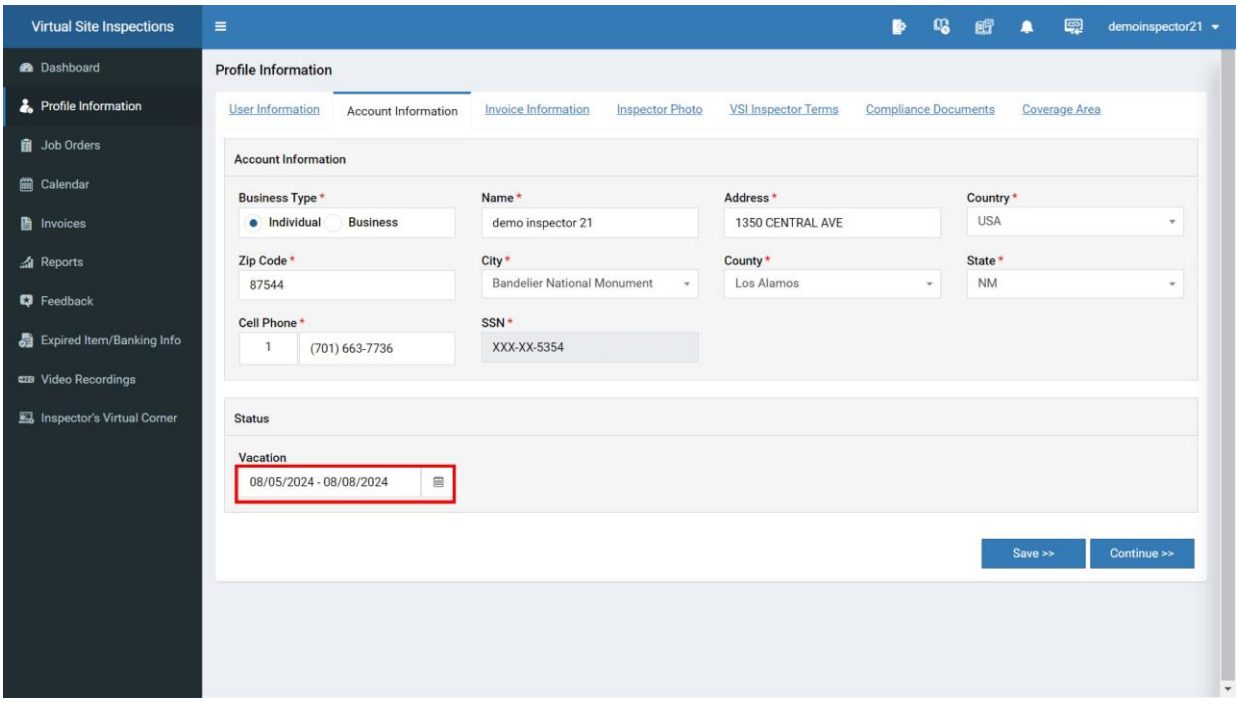
Upon clicking on the "Vacation Date" field, a calendar date picker will open, so the inspector can select the vacation period (Vacation Start and Vacation End) dates.



After selecting the Vacation Start and Vacation End dates, click on the "Apply" button on the calendar, and the selected dates will be set in the Vacation Field. Please tap on the ‘Save >>’ button to apply the vacation related changes.



Note: If an inspector is on vacation status, the vacation date field will be disabled.

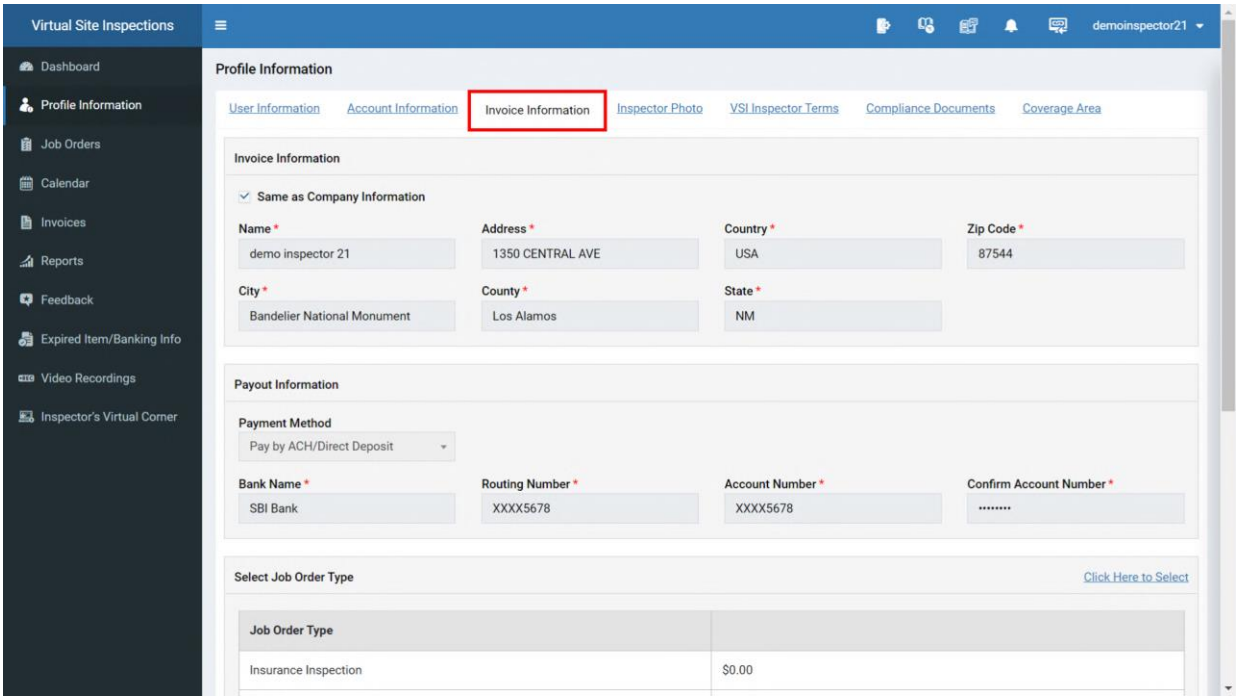


To save the changes made in the Account Information tab, please click on the 'Save' button. The Save button will store all the modifications on the server. Afterward, click on the 'Continue>>' button to proceed to the next tab. This process ensures that the changes are successfully saved before moving to the next section.

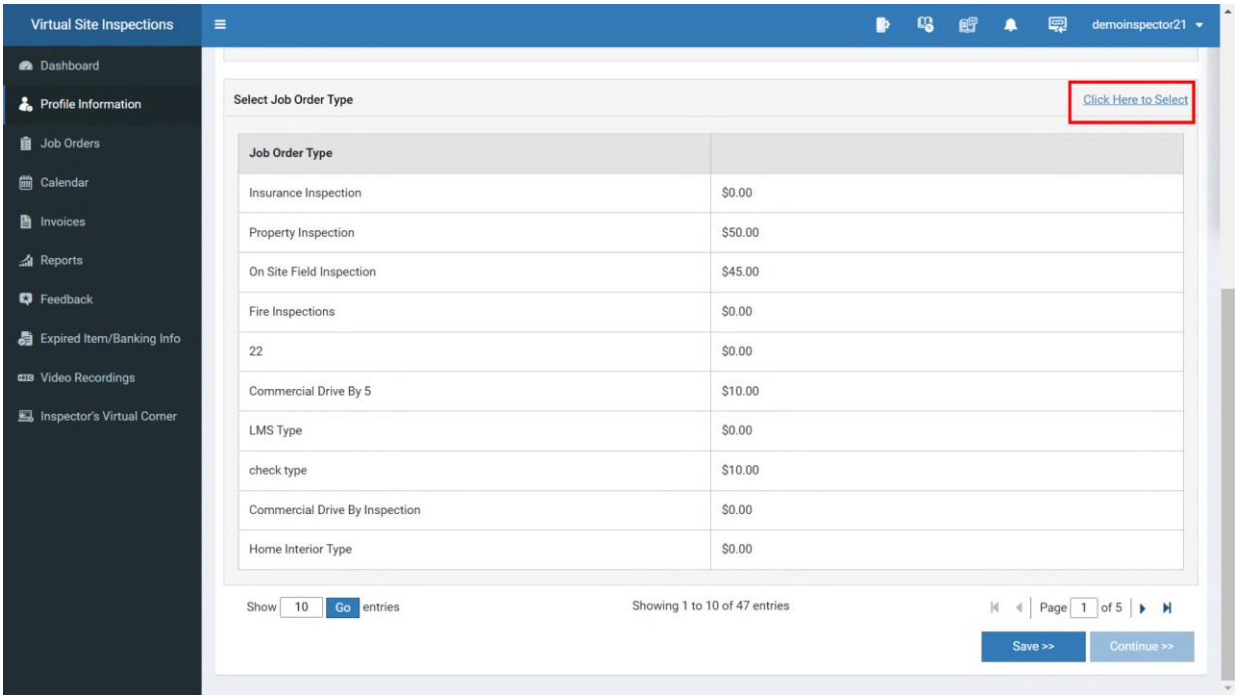
Note: TAX/SSN ID, Automobile Insurance Details and Driver's License Information will be disabled once details are filled and save the details.

c) Invoice Information

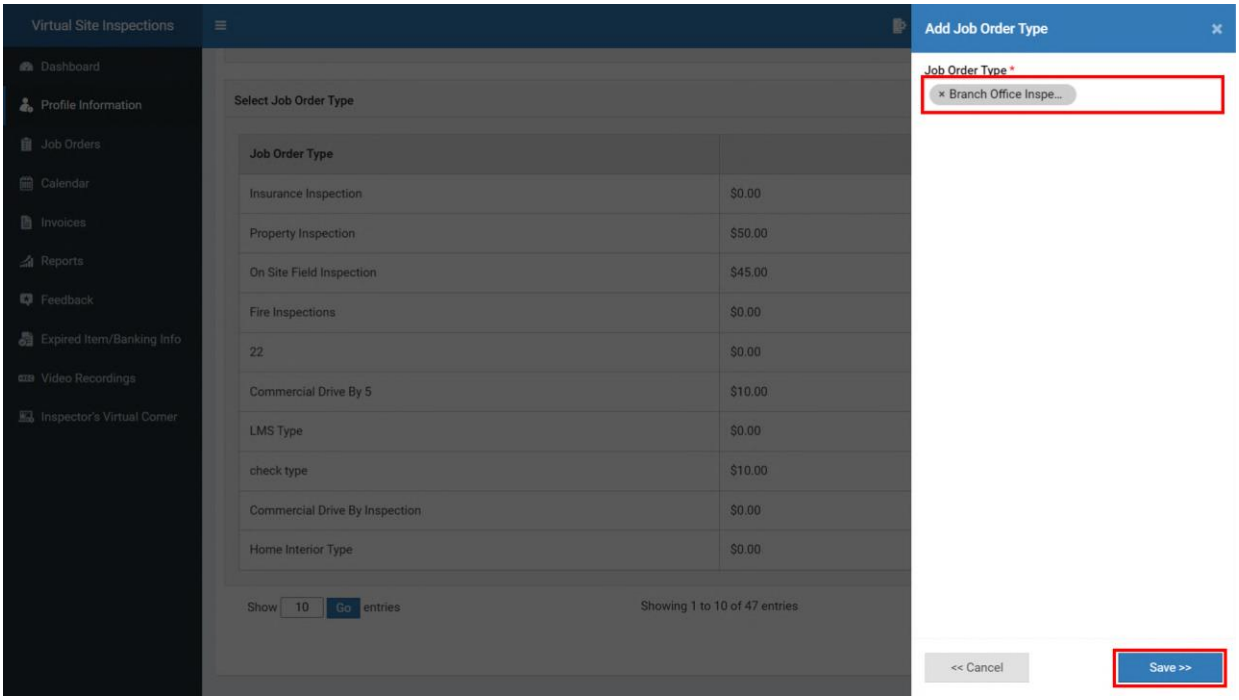
When you click on the 'Invoice Information' tab, a new section will open with three distinct subsections: Invoice Information, Payment Information, and Select Job Order Type. The Invoice Information section focuses on invoicing details like company name and address. The Payment Information section includes details about payment methods and banking information, such as the bank name, routing number, and account number. Additionally, in the 'Select Job Order Type' section, you'll find information about the type of job and its associated pricing.



Upon clicking on "Click Here to Select" a sidebar will open.



In the provided functionality, users can select from various job order types listed in a dropdown menu. Once a specific job order type is chosen, clicking the 'Save' button adds it to the list along with an associated price. Each job order type may have a different price, representing the amount that can be earned upon the successful completion of that particular job order. This feature allows for easy selection and pricing of job orders based on their types.

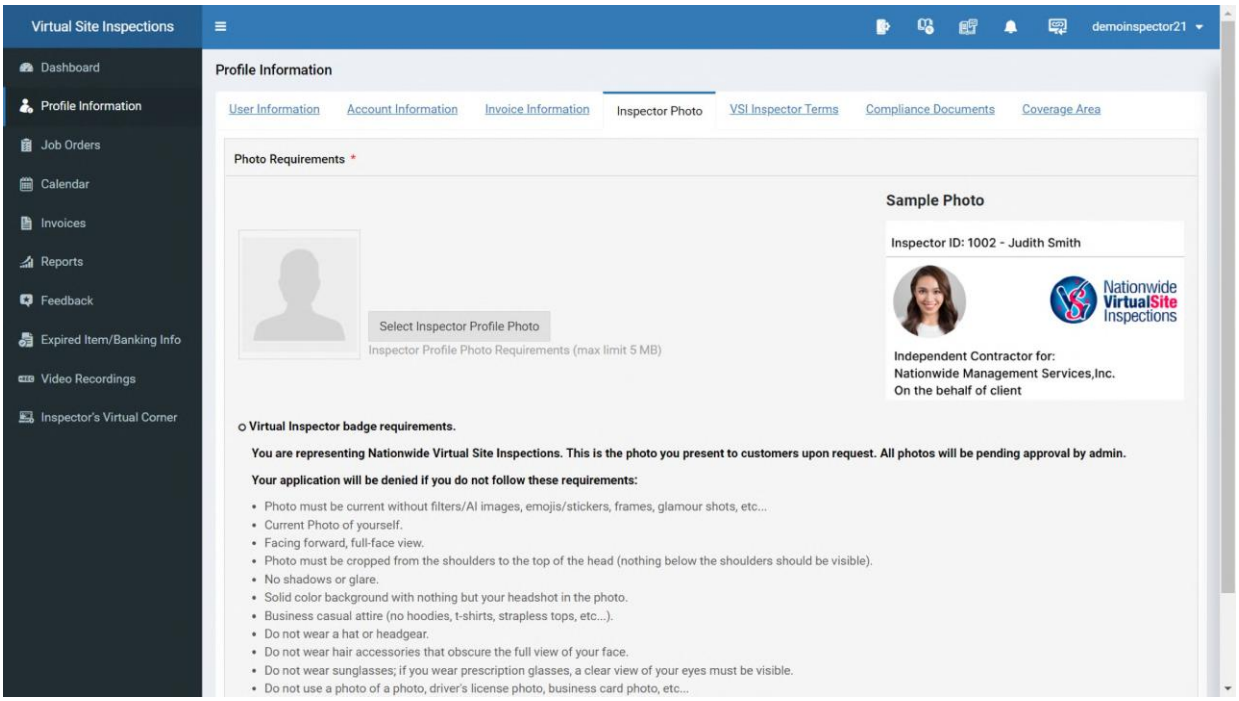


To save the changes made in the Invoice Information tab, please click on the 'Save' button. The Save button will store all the modifications on the server. Afterward, click on the 'Continue >>' button to proceed to the next tab. This process ensures that the changes are successfully saved before moving to the next section.

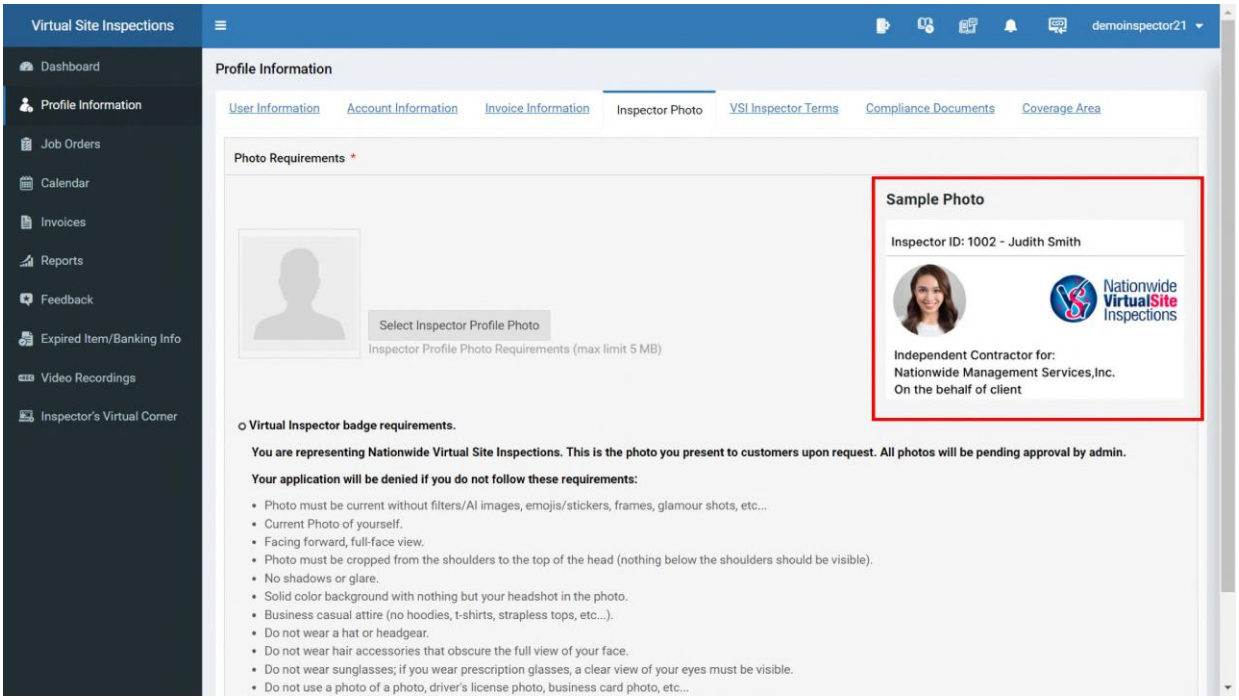
Note: Banking Information such as Bank Name, Routing Number, Account Number and Confirmation Account Number, SSN/Tax ID field will be disabled after successfully saving those details.

d) Inspector Photo Tab

When you click on the 'Inspector Photo' tab, a new section will open allowing you to set your photo. Below that, you'll find the photo guidelines section.



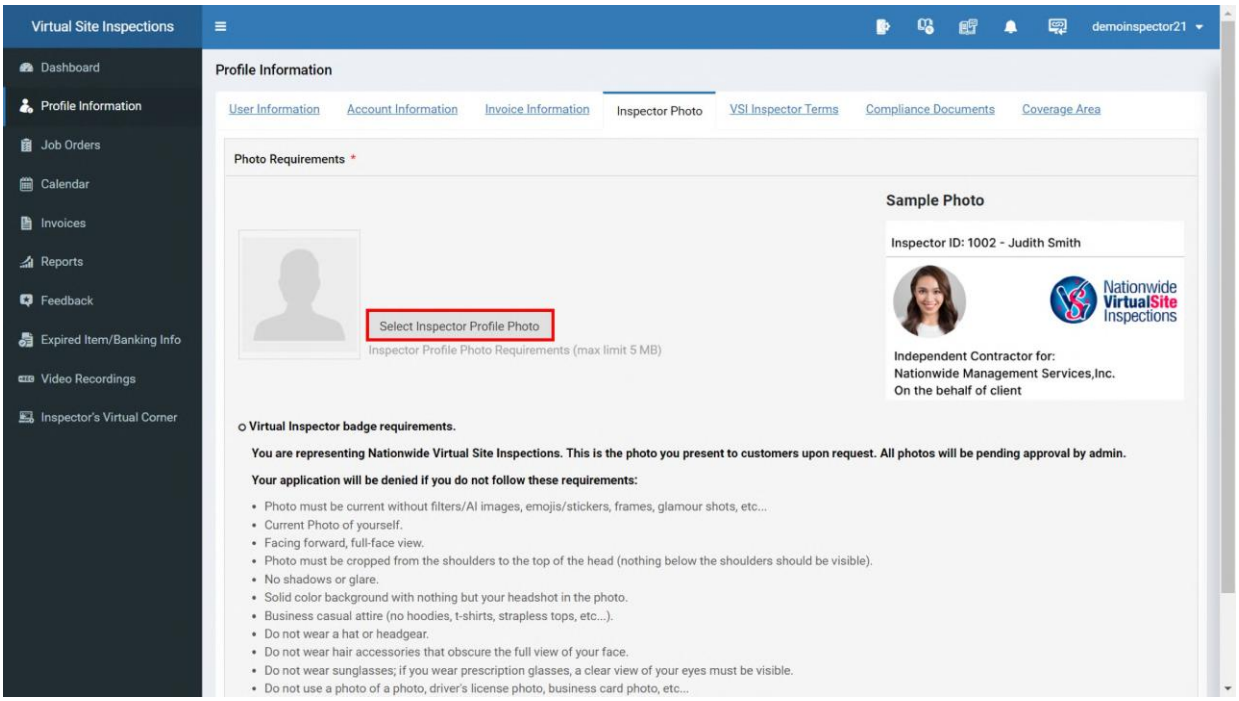
Inspector can view the sample photo on the right side, Please Make sure you follow the virtual inspector badge guide line for your profile photo.



To upload a profile photo, click on the "Select Inspector Profile Photo" button. Upon clicking, a browser pop-up will open, allowing the inspector to choose the desired photo.

When the inspector uploads a profile photo and “Select Inspector Profile, it will be sent for approval. Once approved, the profile photo will be automatically set in the profile photo.

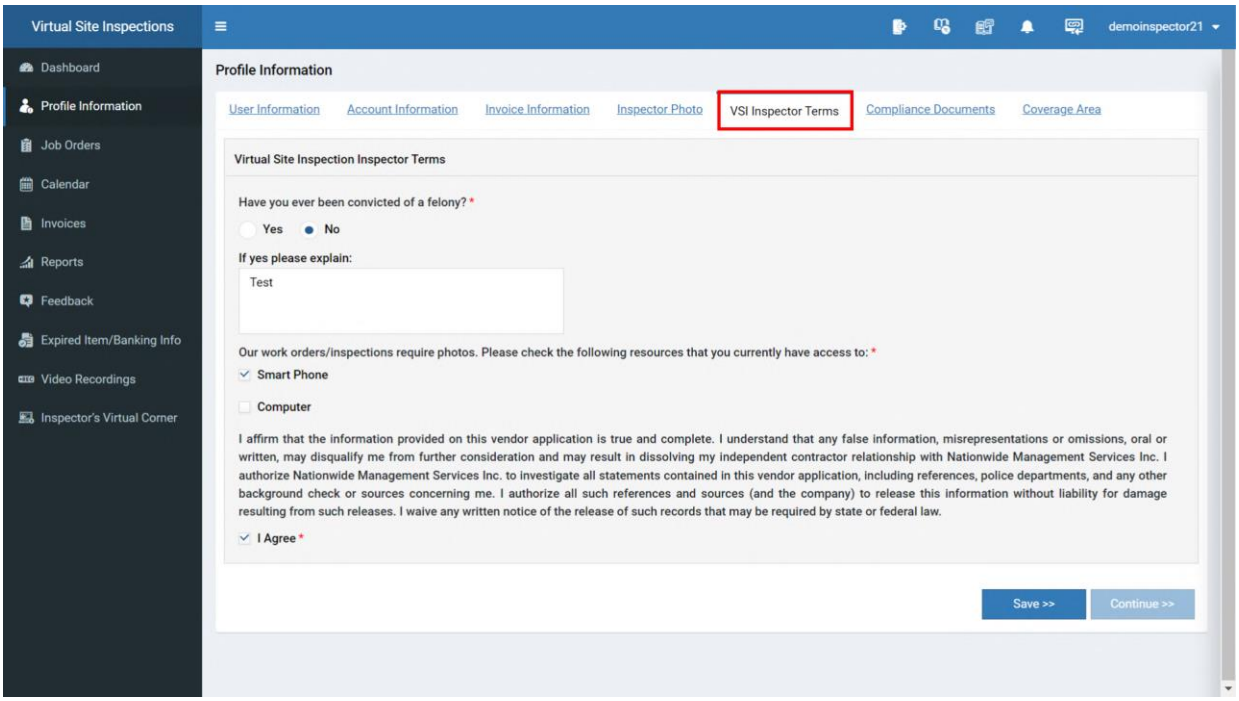
Note: The 'Select Inspector Profile' button will be disabled after the inspector clicks on it to select and upload a photo, remaining disabled until the uploaded photo is either approved or declined.



To save the changes made in the Inspector Photo tab, please click on the 'Save' button. The Save button will store all the modifications on the server. Afterward, click on the 'Continue >>' button to proceed to the next tab. This process ensures that the changes are successfully saved before moving to the next section.

e) VSI Inspector Terms Tab

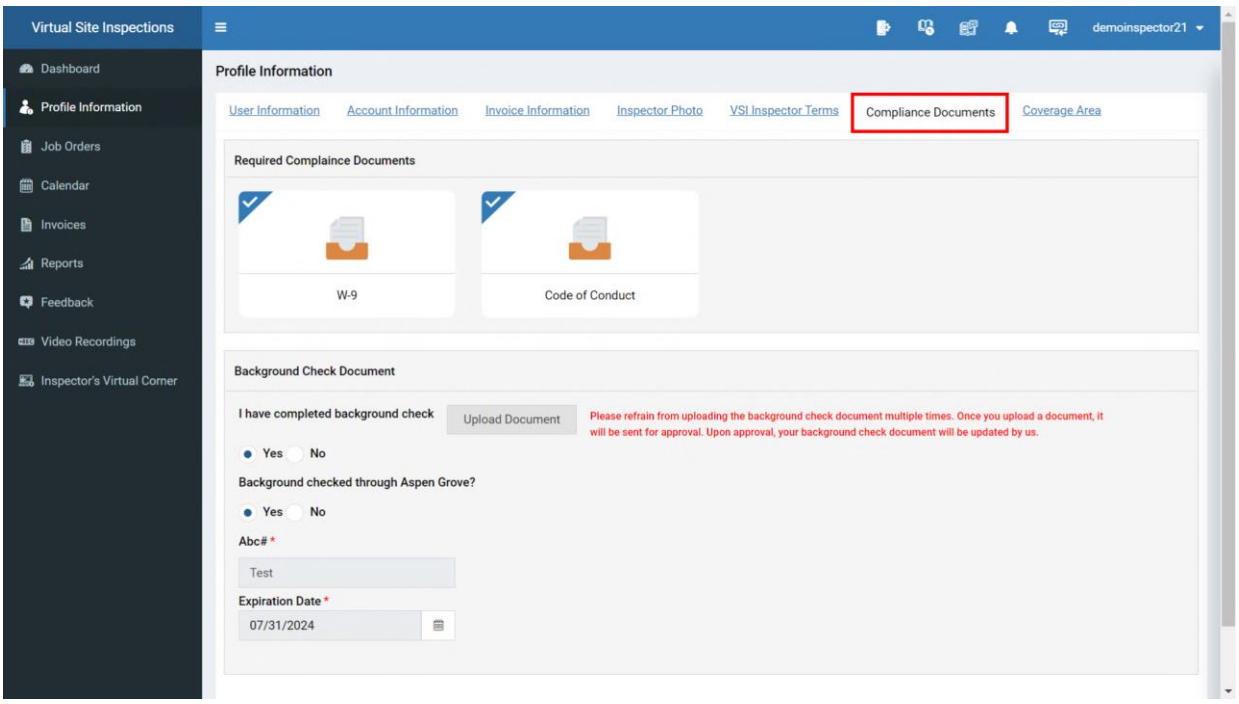
When you click on the 'VSI Inspector Terms' tab, a new section will open where you can review and fill out the required fields for the Virtual Site Inspection Inspector Terms."



To save the changes made in the VSI Inspector Terms tab, please click on the 'Save' button. The Save button will store all the modifications on the server. Afterward, click on the 'Continue >>' button to proceed to the next tab. This process ensures that the changes are successfully saved before moving to the next section.

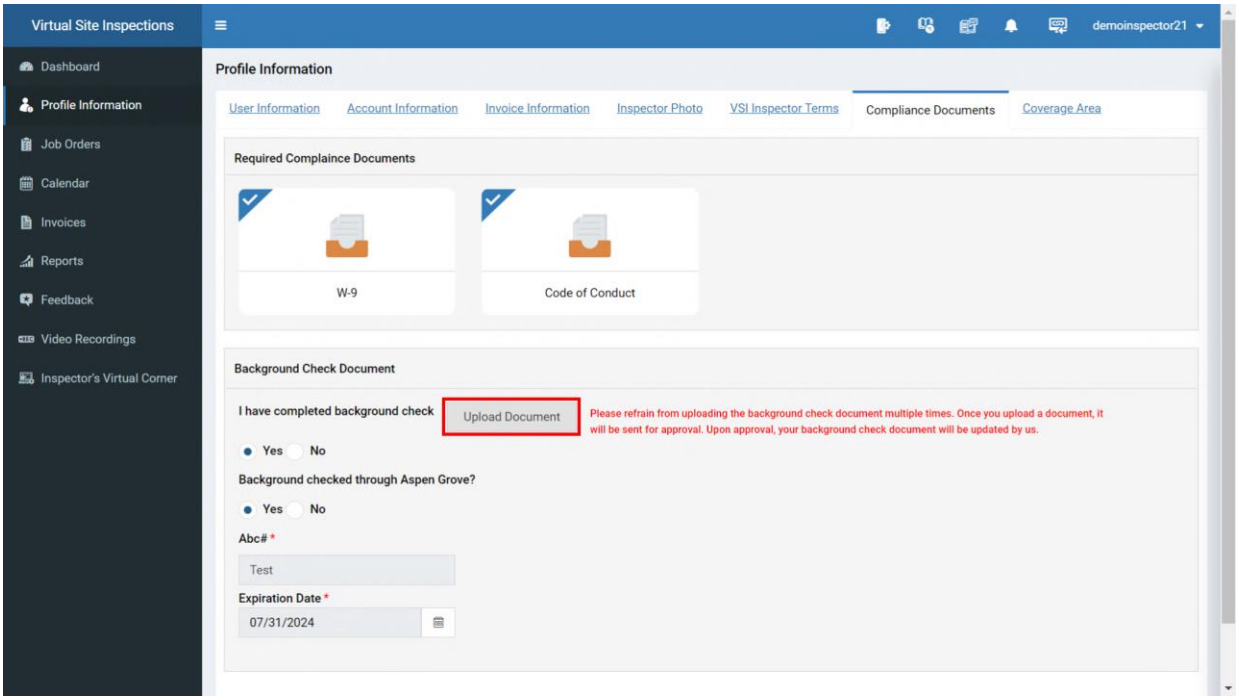
f) Compliance Document

When you click on the 'Compliance Document' tab, a new section will open. Inside this tab, you will find two documents: 'W-9' and 'Code of Conduct'. From there, you will need to fill in all the required details for each document. Additionally, there is a background check document section.



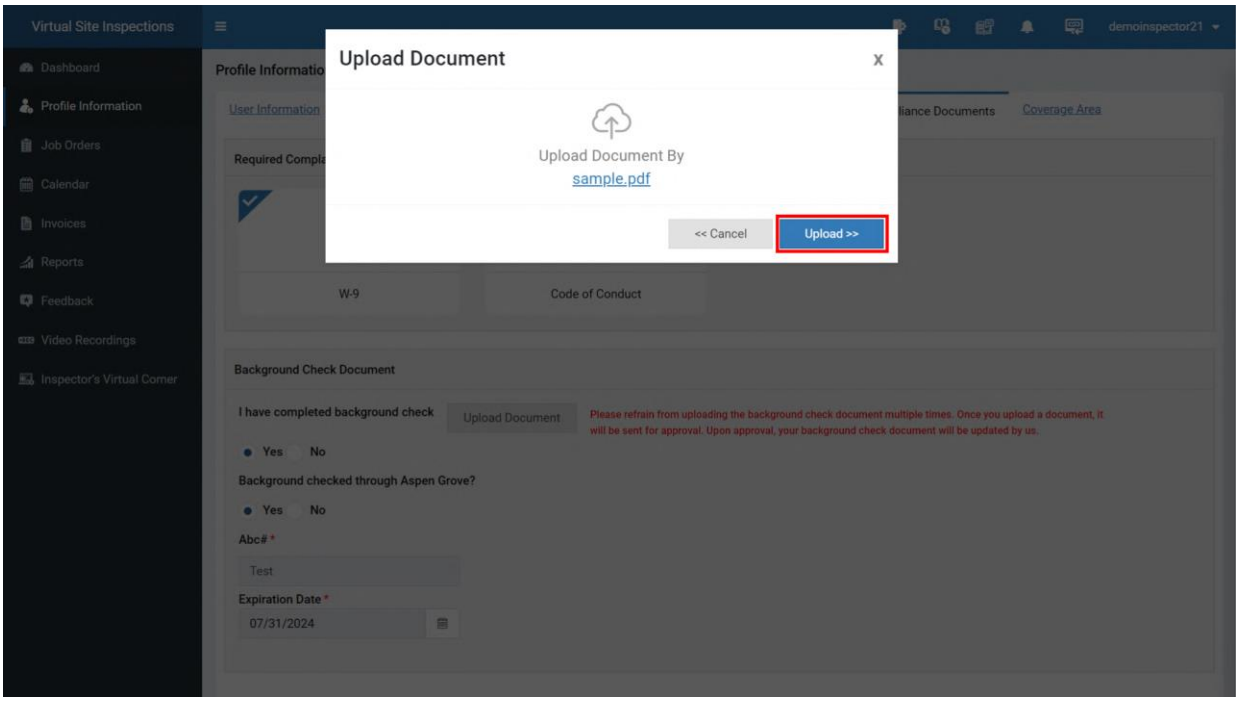
Only inactive inspectors can modify their answers to questions “I have completed background check document” and “Background checked through Aspen Grove”. ABC# and Expiration Date fields are disabled for modification for all inspectors.

The "Upload Document" link will only be visible for inactive inspectors. To upload the background check document, click on the "Upload Document" button.



After clicking on the 'Upload Document' link, a browser pop-up will open. From there, you can select the file and click on the 'Upload' button.

Once Inspector uploads a background check document, it will be sent for approval. Once approved, the background check document information will be updated by the admin.



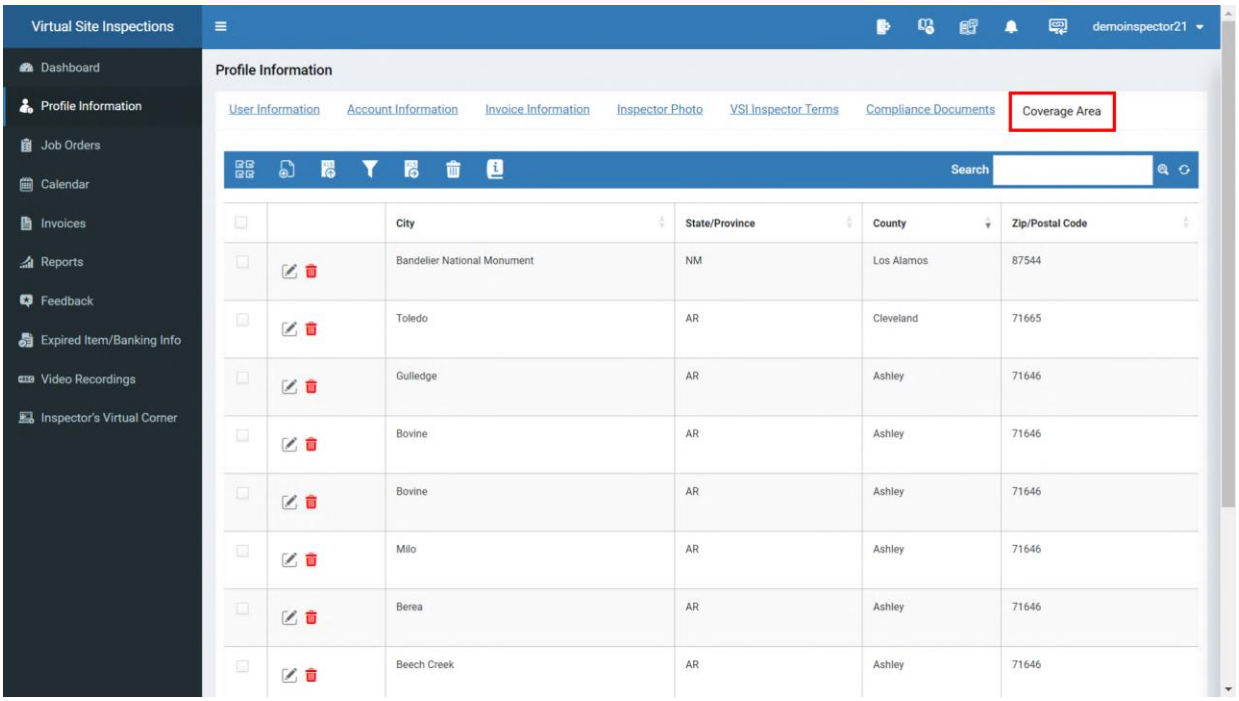
To save the changes made in the Compliance Documents tab, please click on the 'Save' button. The Save button will store all the modifications on the server. Afterward, click on the 'Continue >>' button to proceed to the next tab. This process ensures that the changes are successfully saved before moving to the next section.

Note: The 'Upload Document"' button will be disabled after the inspector clicks on it to select and upload the document, remaining disabled until the uploaded document is either approved or declined.

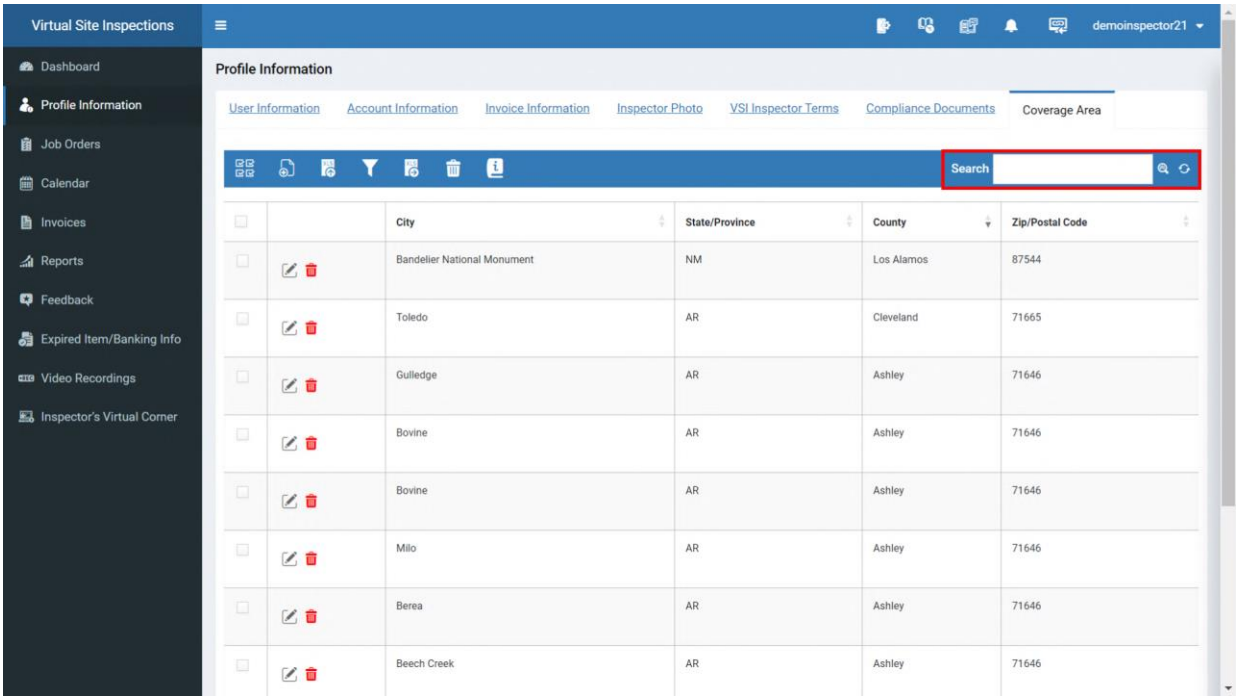
g) Coverage Area

Within the "Coverage Area" section, you'll find six major options in the blue header bar: 'Select All', 'Add New', 'Click here to upload multiple zip codes', 'Filter', ‘XLS Export' and 'Delete'.

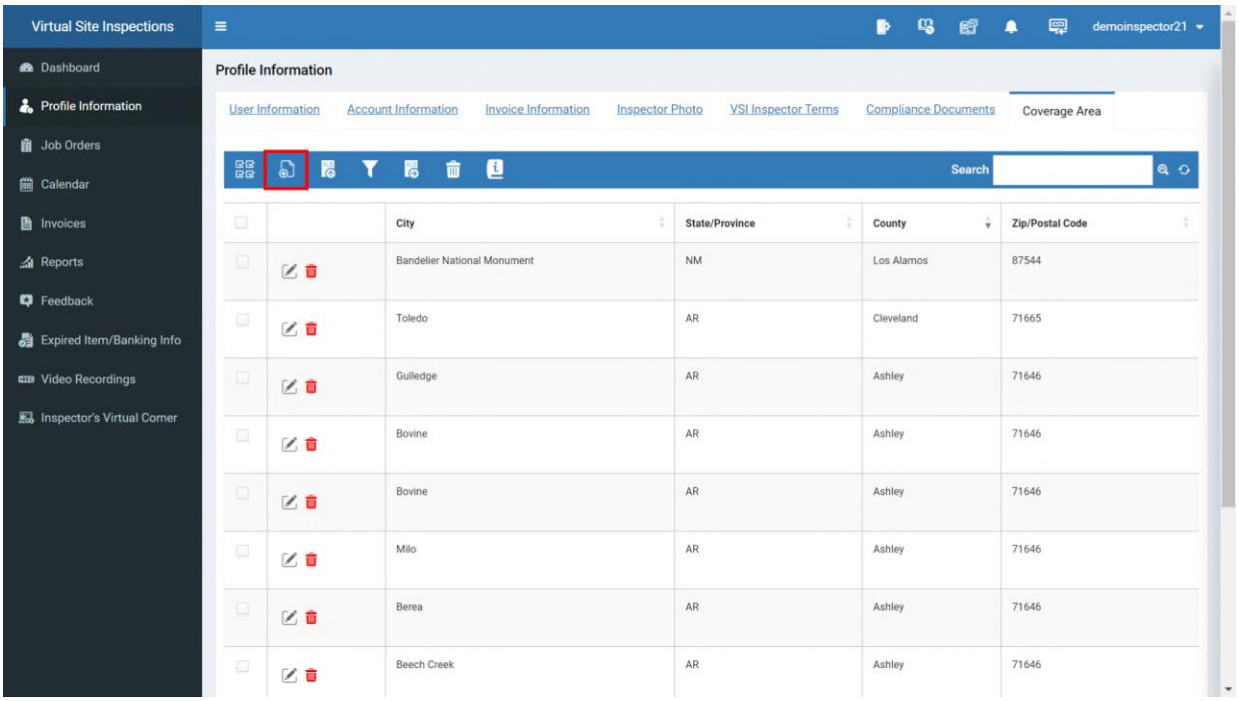
To access the Coverage Area section, the Inspector can click on the "Profile Information" menu located in the left-side panel.This action will redirect them to the Profile Information page. On this page, clicking on the "Coverage Area" tab will open the Coverage Area List page, where all created Coverage Area are displayed.



To search for a Coverage Area using a keyword, the system conducts the search in the Name field. Enter your search term in the highlighted search field, as shown in the provided screenshots, and press enter or click on the finder icon next to the text field. The system will then search for matching words in the City, State/Province, County, Zip/Postal code, and display the relevant Coverage Area records.



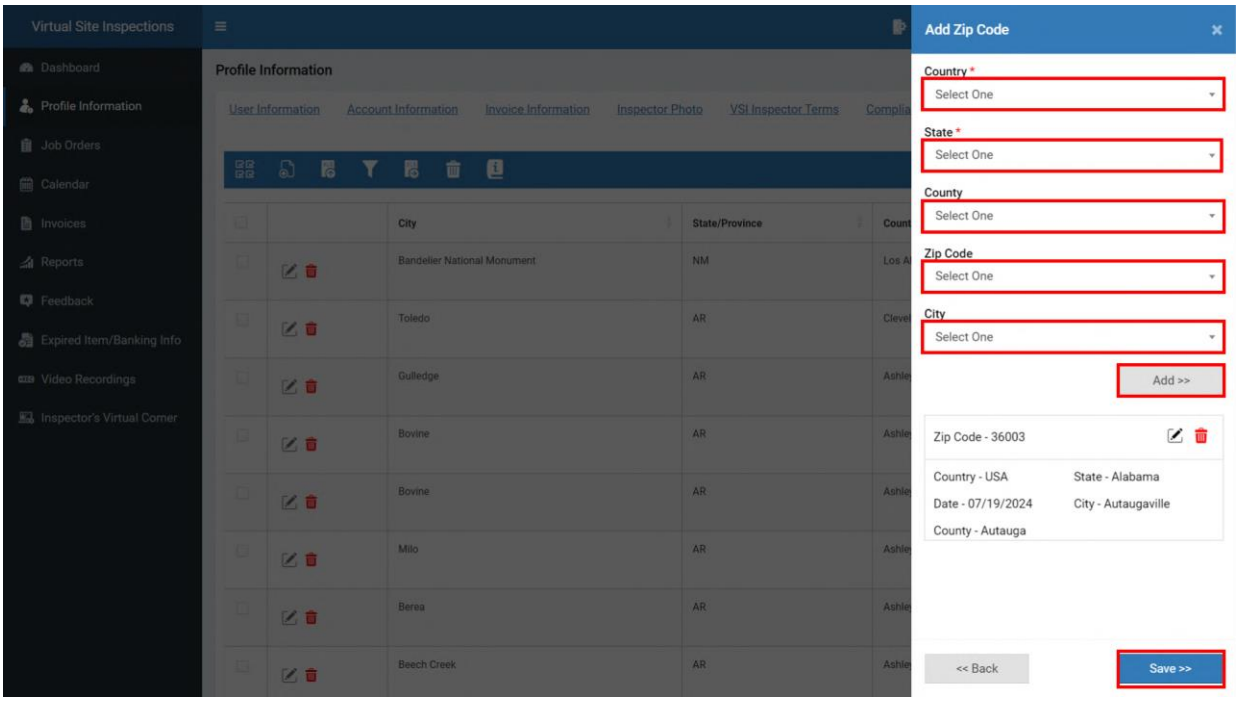
To add a new Coverage Area, click on the 'Add New' icon, as highlighted in the provided screenshot. This action will commence the process of adding a coverage area in the inspector profile.



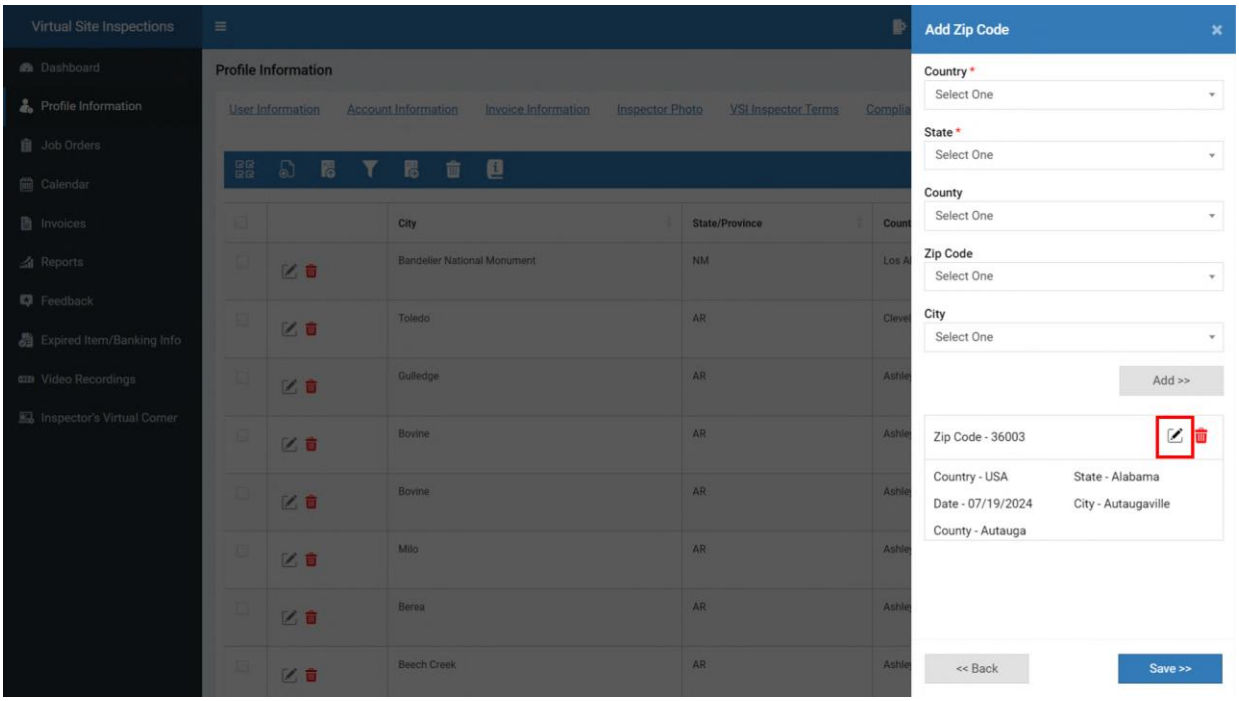
When you click on 'Add Coverage Area', the sidebar will open a side modal. Select the country, and based on that, it will load the corresponding state. After selecting the state, it will load the available county, choose a county, and it will then load the associated zip codes.Select a zip code, and it will load the available city. Clicking on the 'Add' button will input the specified information locally, displaying it below in a card view. However, it will not be stored on the server until the 'Save' button is clicked.

There is an important distinction to note: the fields for country and state are mandatory, while county, zip code, and city are optional. If we select the country and state and click on the add button, the system will automatically add all the corresponding mapping Zip Codes of the chosen country,state.

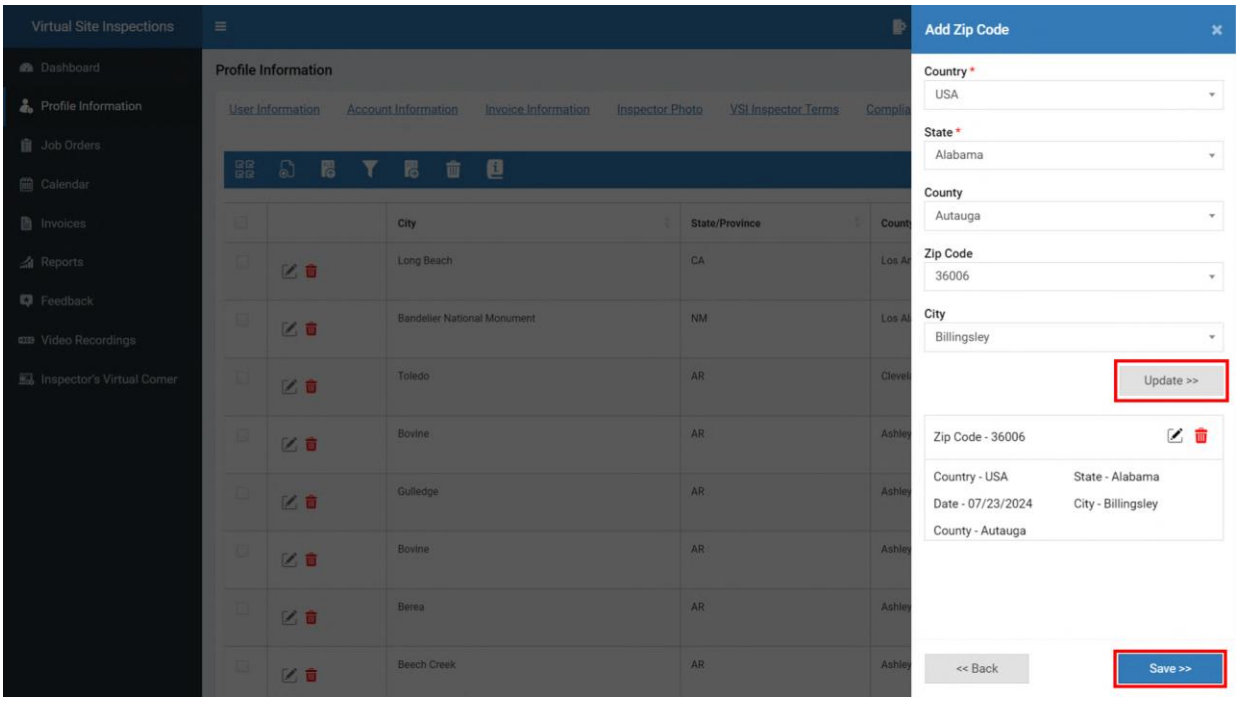
If we select the country,state and county and click on the add button, the system will automatically add all the corresponding mapping Zip Codes of the chosen state, county, and city.



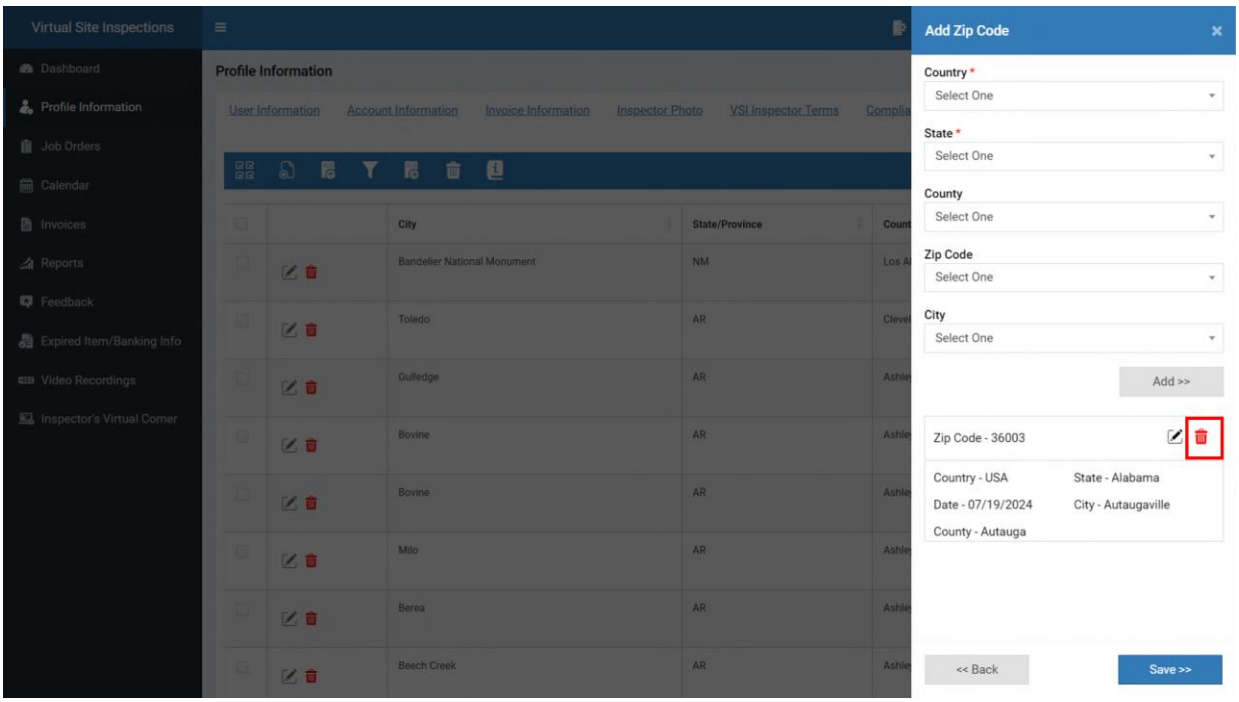
We can update and delete data directly from the card view. Additionally, it is possible to add multiple zip codes using the 'Add' button, Adding data in the card view. To edit specific data from the card view, click on the edit icon within the card view.It's important to note that adding and editing data in the card view implies that no actions are performed on the server until the 'Save' button is clicked.



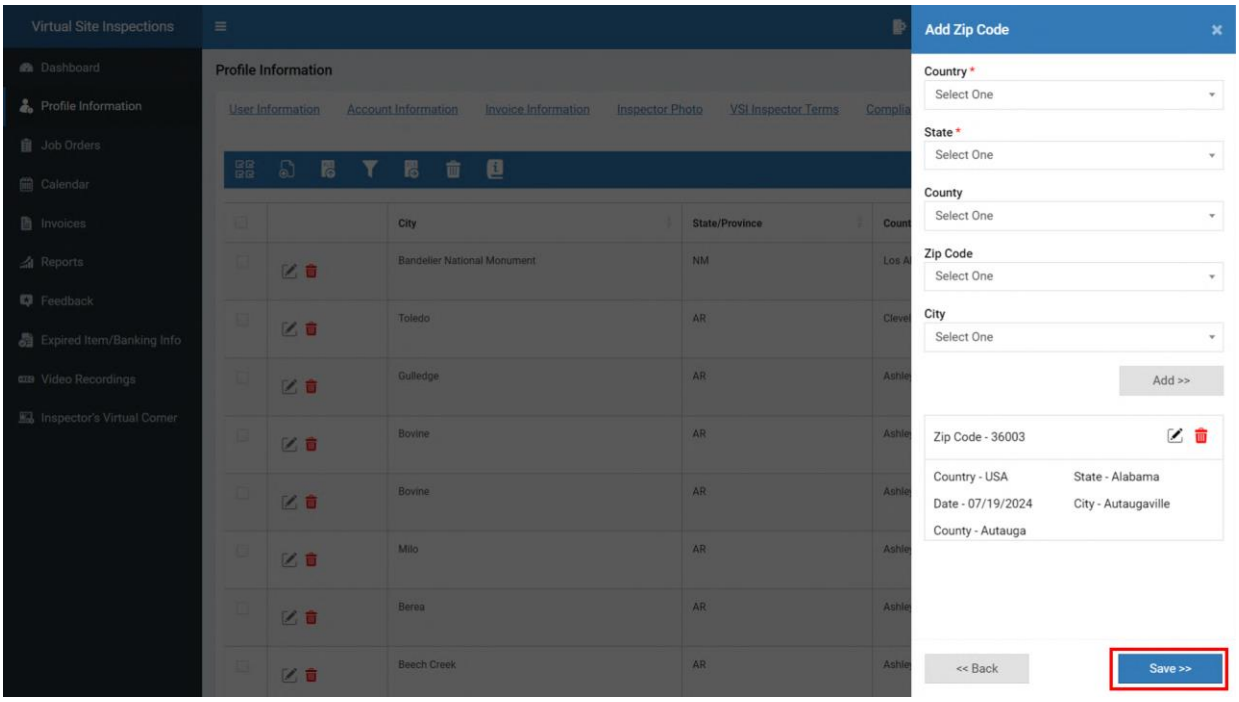
After clicking on the edit button, all values are automatically pre-selected in their respective dropdowns, such as country, state, county, zip code, and city. The 'Add' button is renamed to 'Update.' You can modify the values, and upon clicking the 'Update' button, the card view is automatically updated with the latest information, and the above dropdowns will reset.



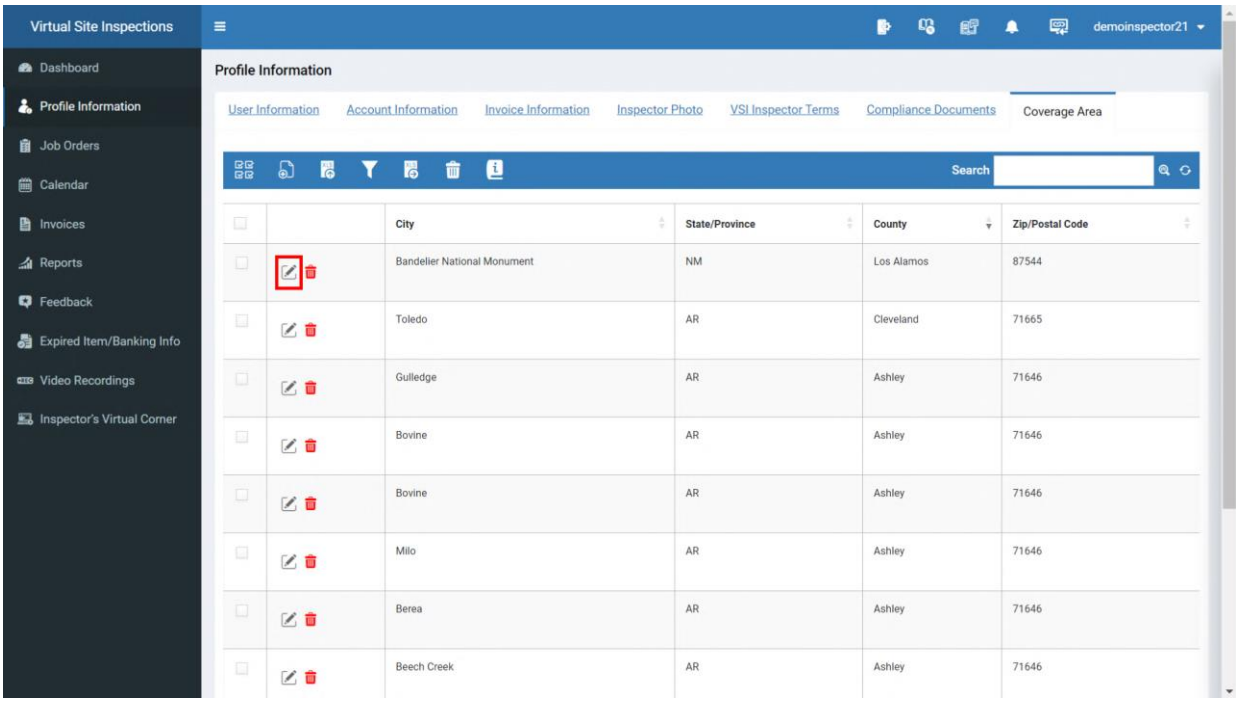
There is an additional option in the card view "Delete" providing the capability to delete data from the card view.



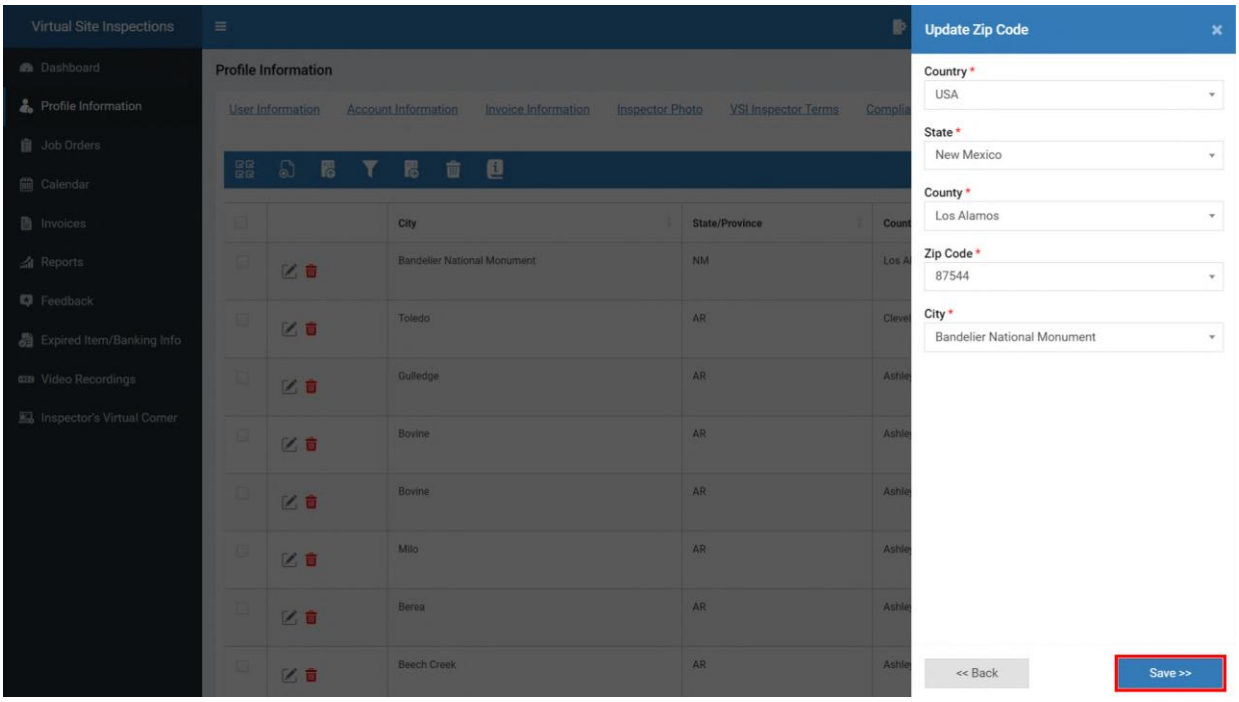
Once you've added all the zip codes in the card view, just click "Save" to store the data on the server, and it will be visible in the list.



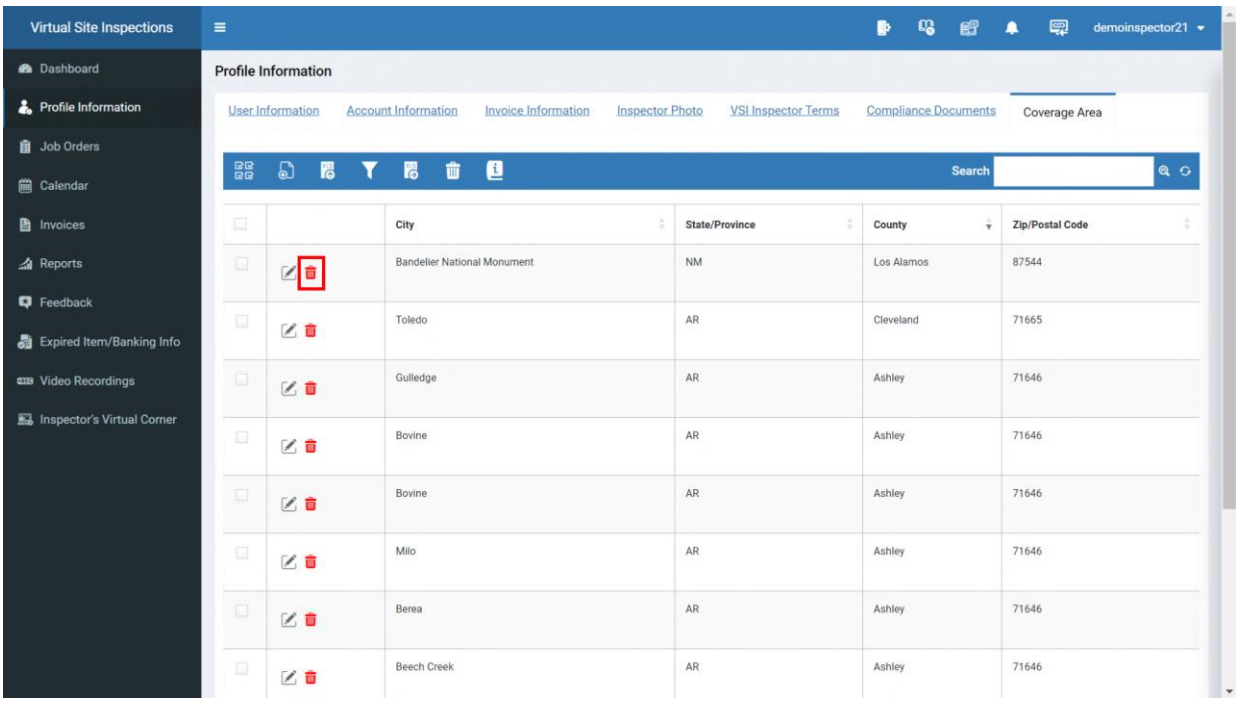
In this feature, there is an edit option to update details, as illustrated in the screenshot below.



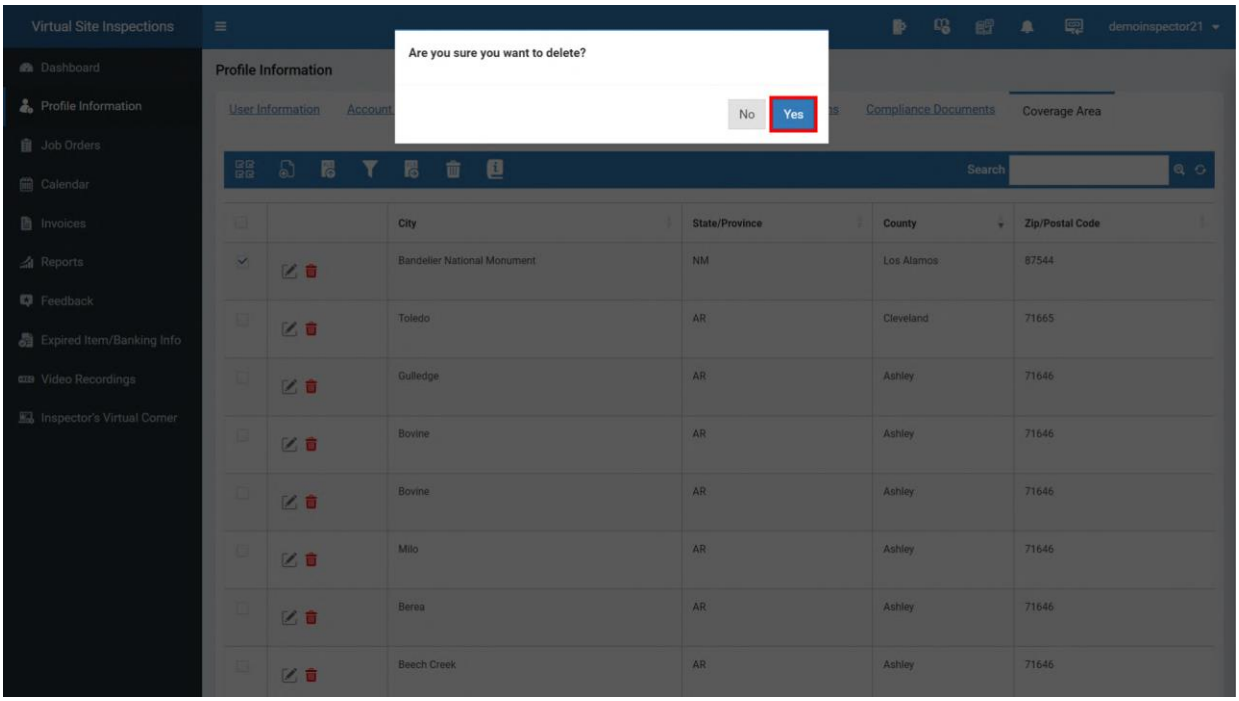
After clicking on the edit button, a side modal will open, allowing us to update the details. After making the necessary changes, click on the "Save" button to update the list.



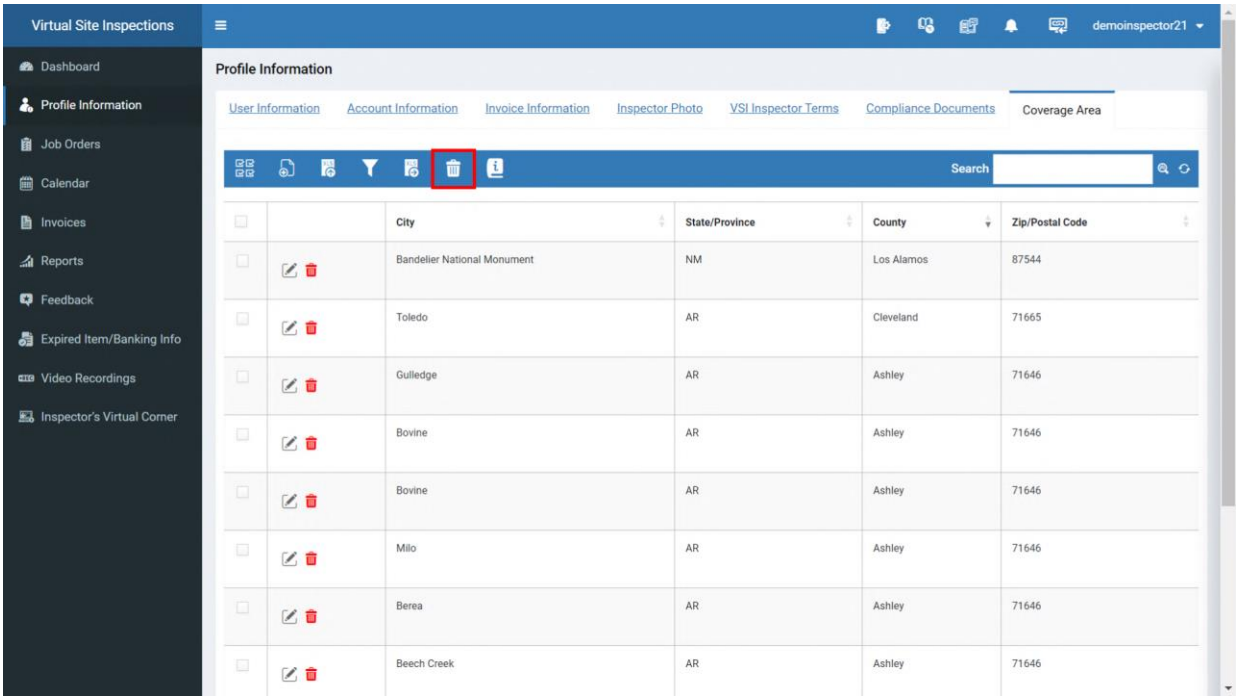
In the list, the initial column features a delete button. This button allows users to remove or delete the corresponding entry from the list.



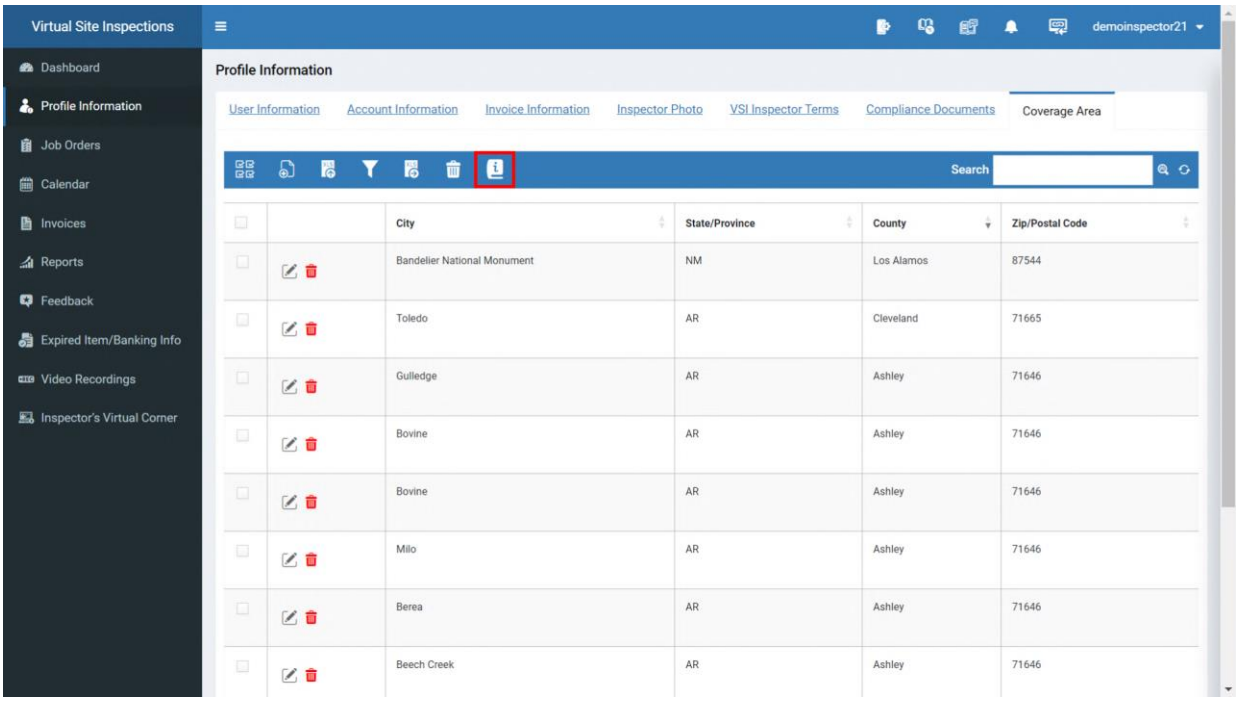
Upon clicking the 'Delete' button, a dialog box will emerge, featuring an alert with the query, 'Are you sure you want to delete ?' Within the dialog, two buttons are available. The first button, labeled 'Yes' confirms the deletion, subsequently removing the entry from the list. The second button, 'No' closes the dialog without performing any action.



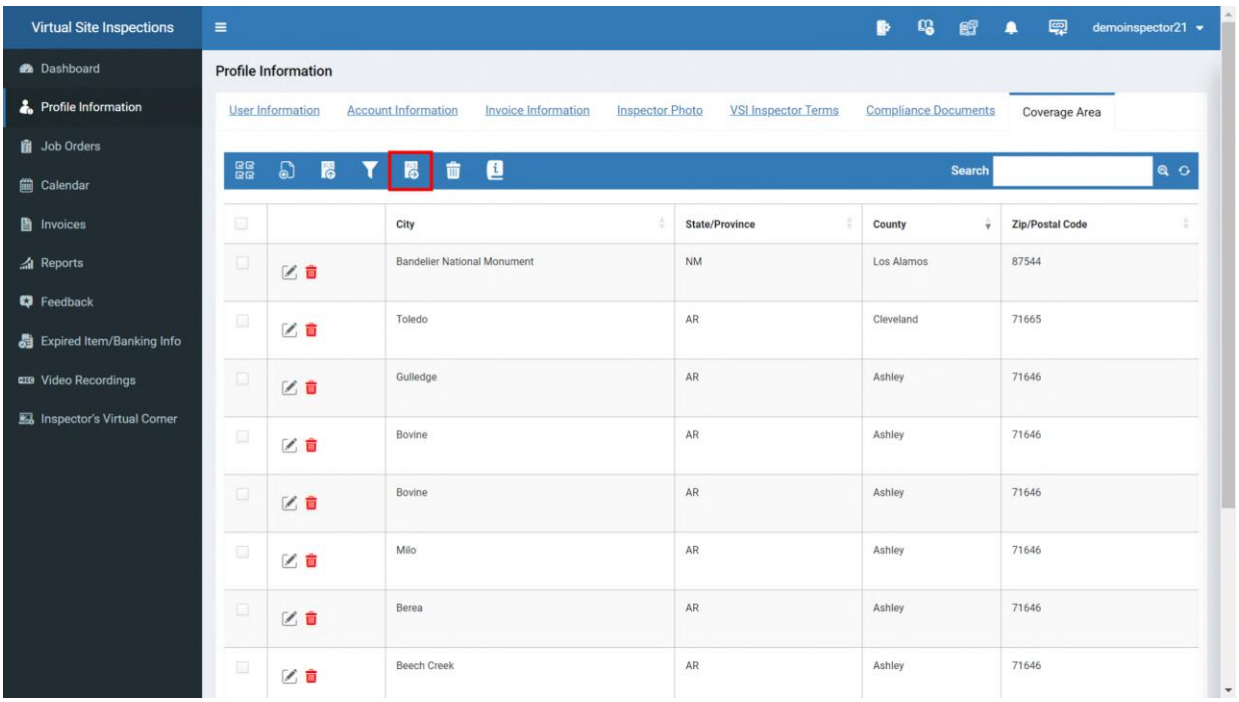
We can delete multiple coverage areas by selecting them using checkboxes and clicking on the delete button in the blue header bar icon, as shown in the screenshot below.



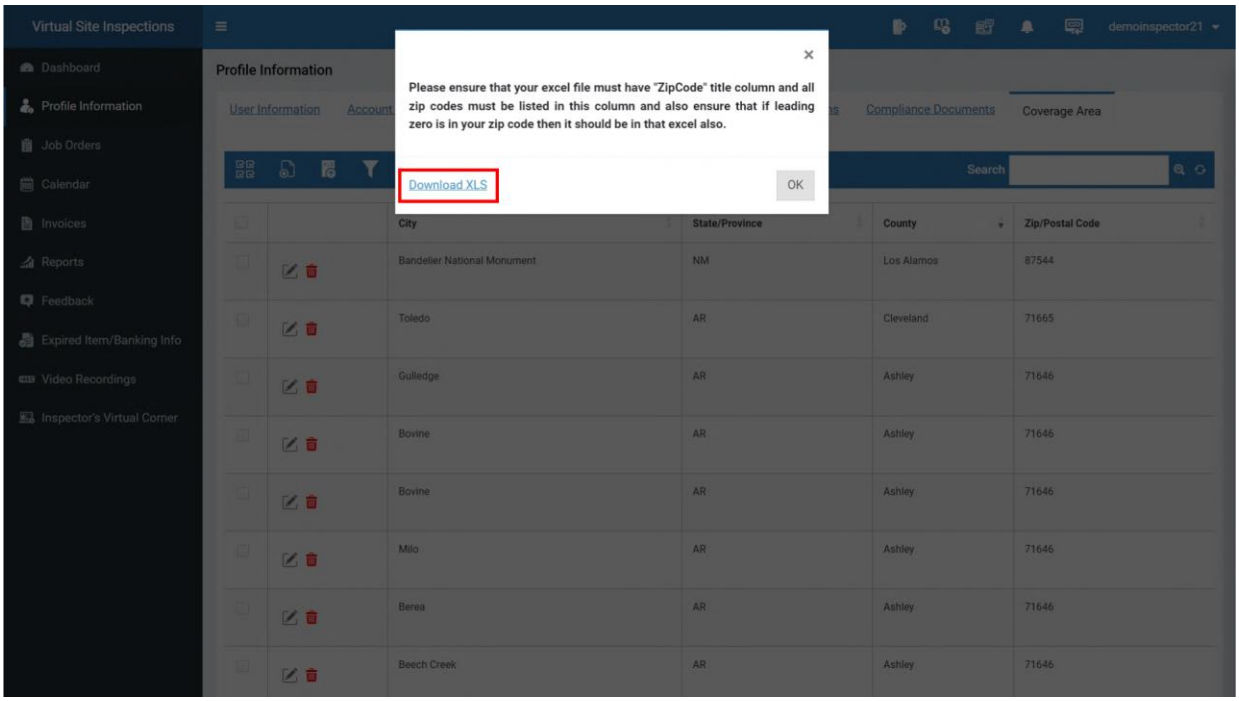
To access the coverage area user guide, click on the "Coverage Area User Guide" icon. Upon clicking, the guide will open in a new tab, allowing you to explore the document seamlessly.



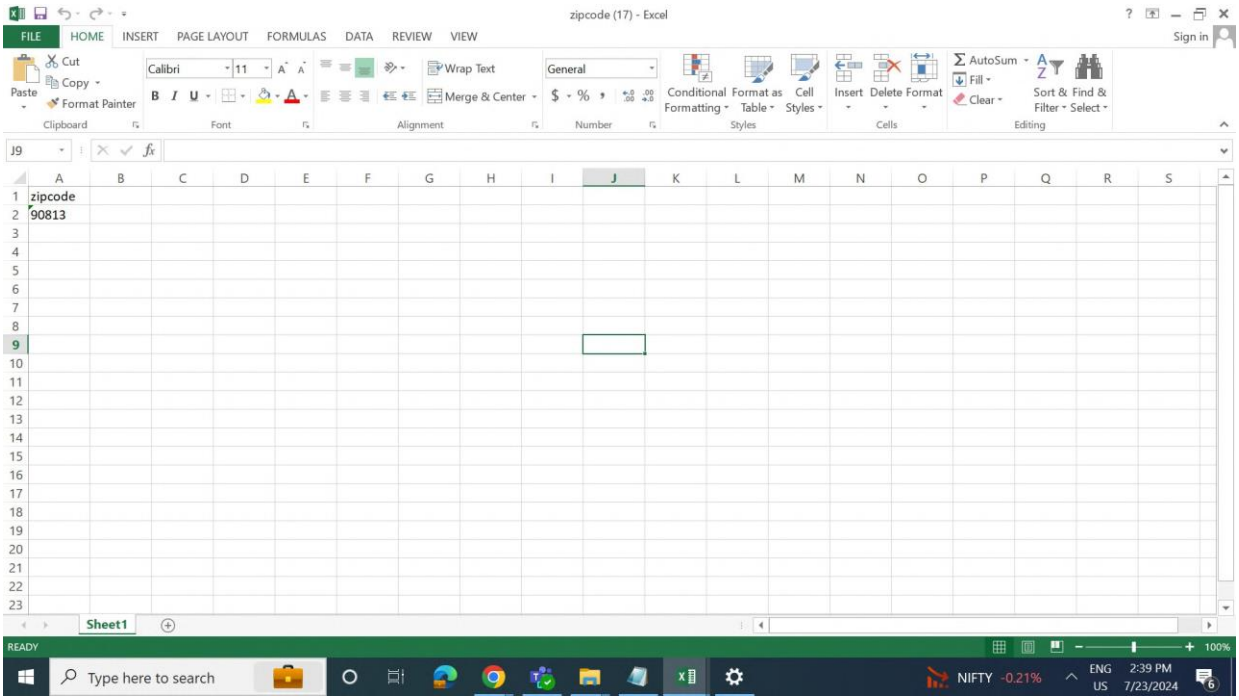
To add several coverage areas, simply click on the "Upload Multiple Zip Code" icon, shown in the screenshot below.



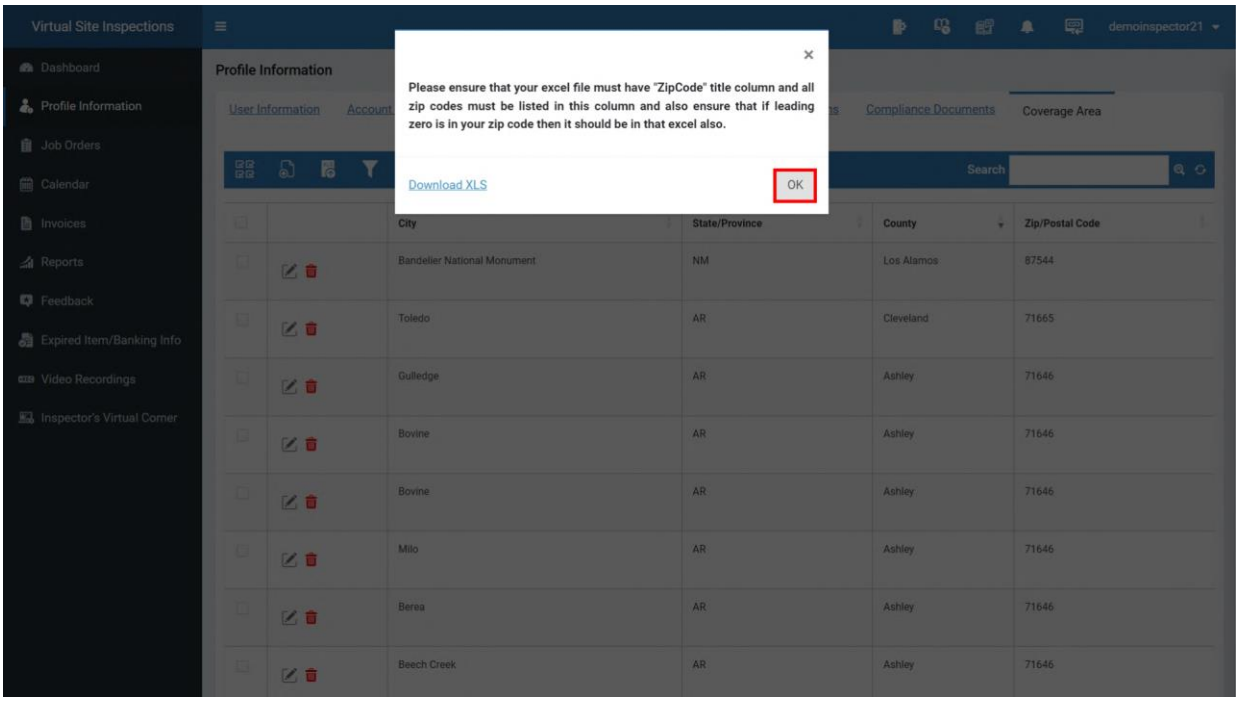
After clicking on that, it will open a dialog with guidelines, and the "Download XLS" link will download the XLS file with a predefined format. Clicking on "Download XLS" will save the file on our system.



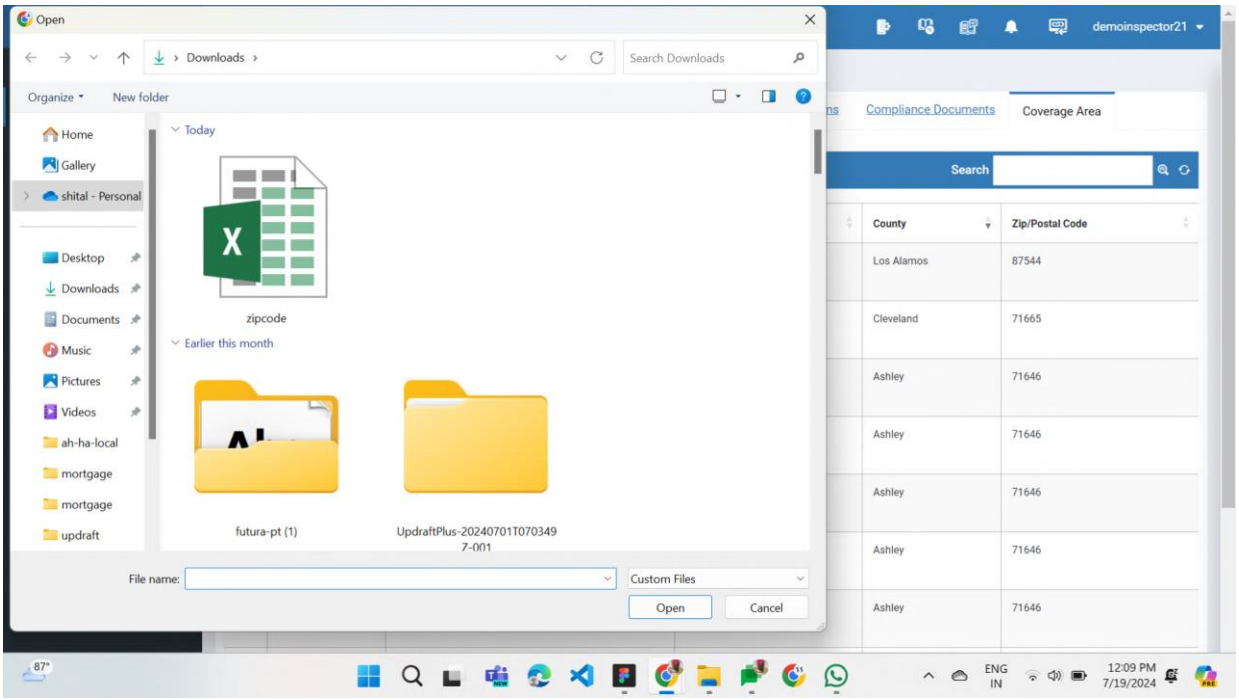
When you open the XLS file, it displays a column labeled "Zip Code". To update the file, you need to add the zip codes to this specific column.



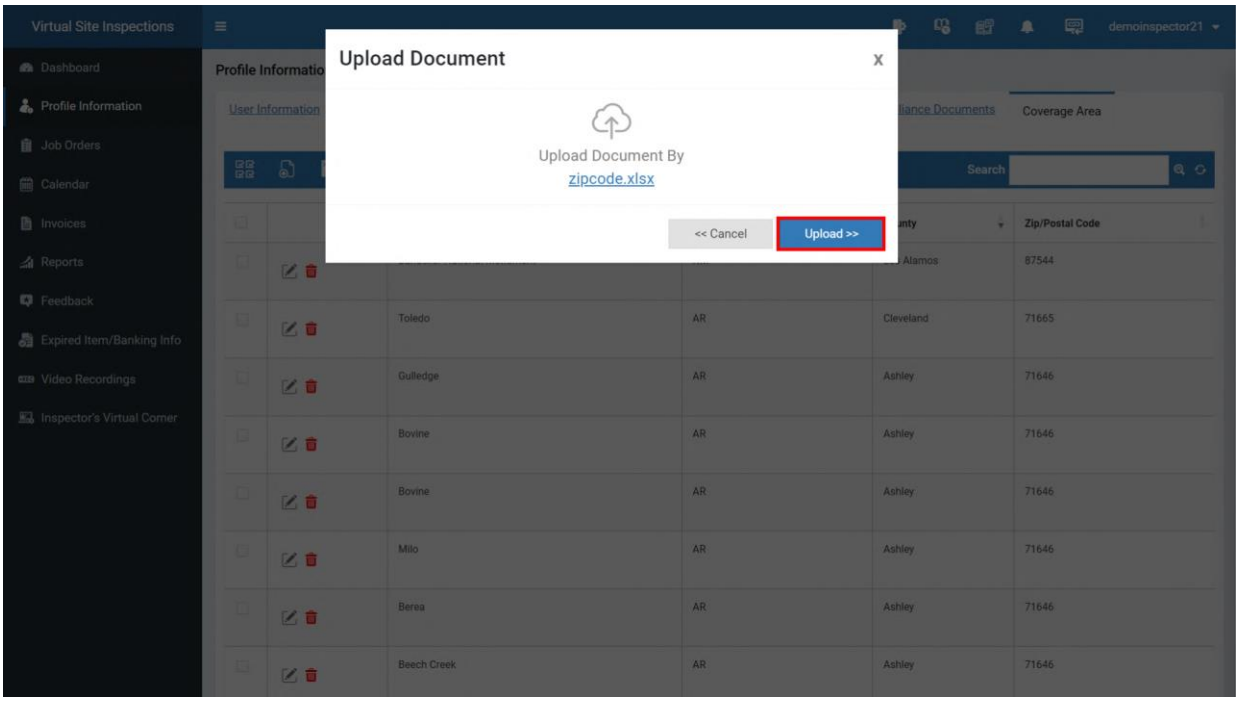
To upload the updated file after adding zip code, Click on the "OK" button, as shown in the screenshot, to initiate the upload process.



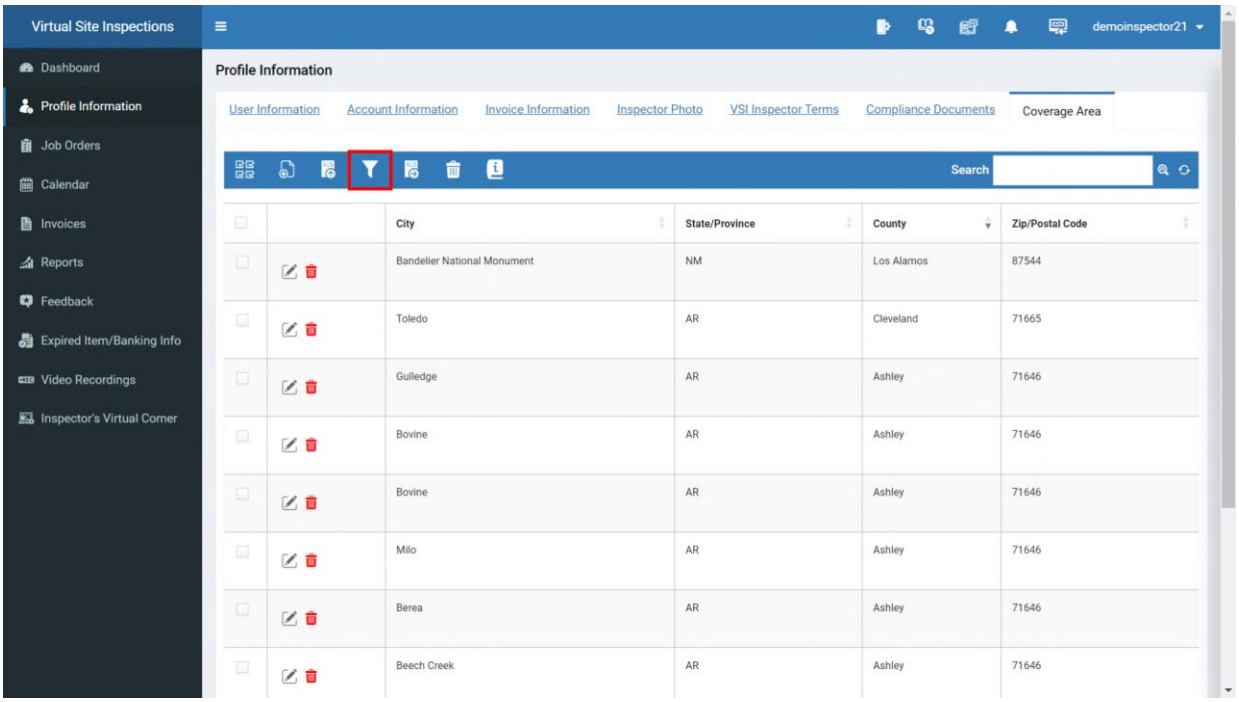
After clicking the button, a system dialog will open, allowing you to choose your file for upload.



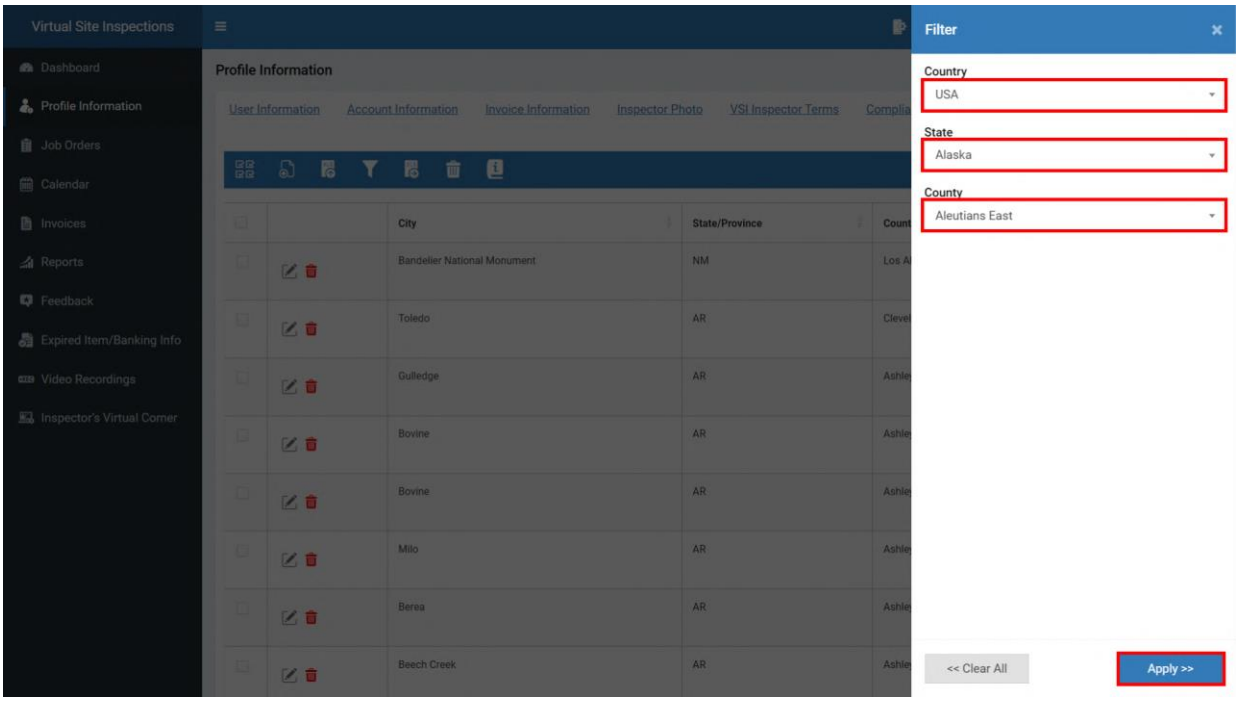
After clicking the "Open" button, a dialog will appear showing the selected file name. If you want to change the file, click on the file name, and you can modify the file. To upload the file, click on the "Upload File" icon. This action will add all the coverage areas from the file to the list.



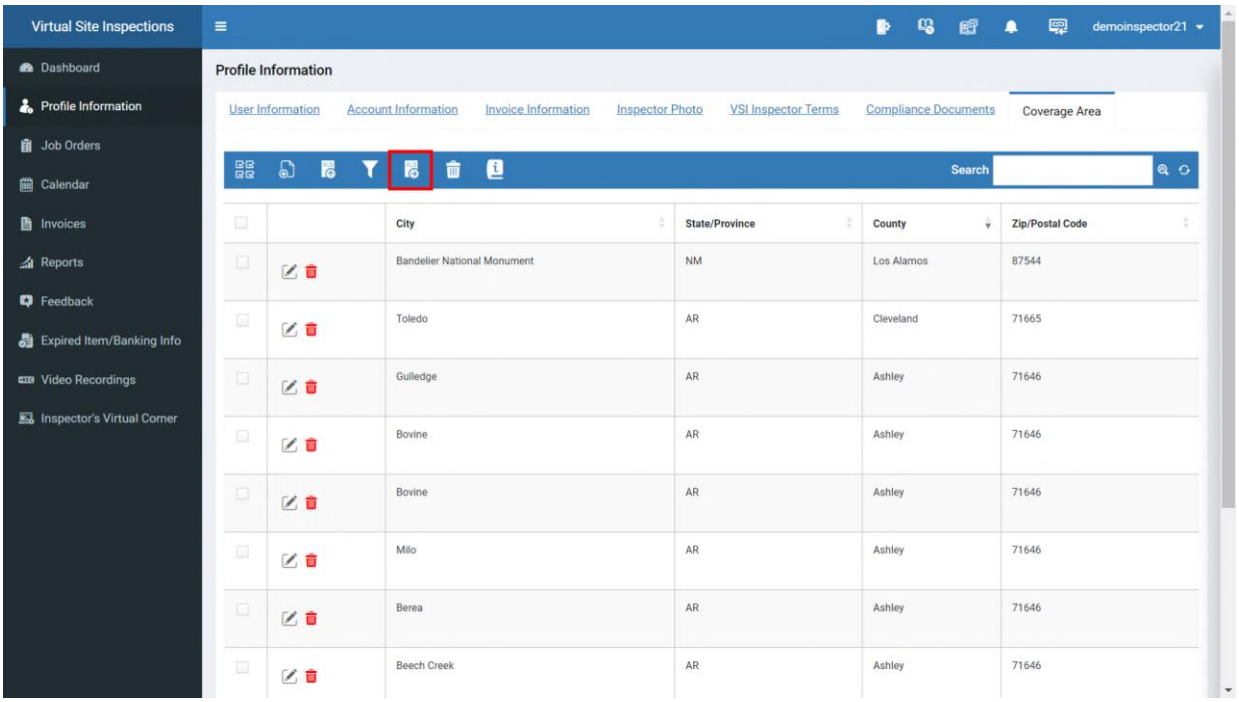
We can filter coverage areas by clicking on the filter icon, as highlighted in the screenshot below.



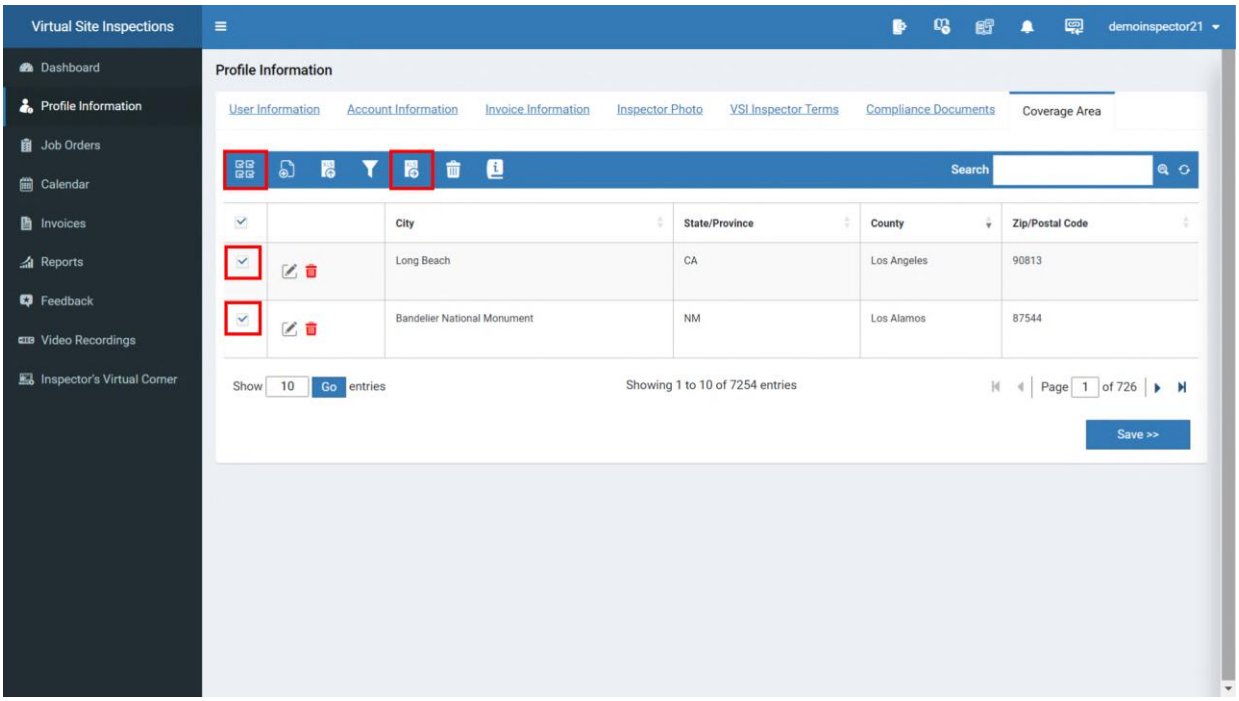
After clicking on the filter icon, it will open a side modal where you can filter by country, state, and county. After selecting the desired values, click on the "Apply" button. This action will filter the data in the list accordingly.



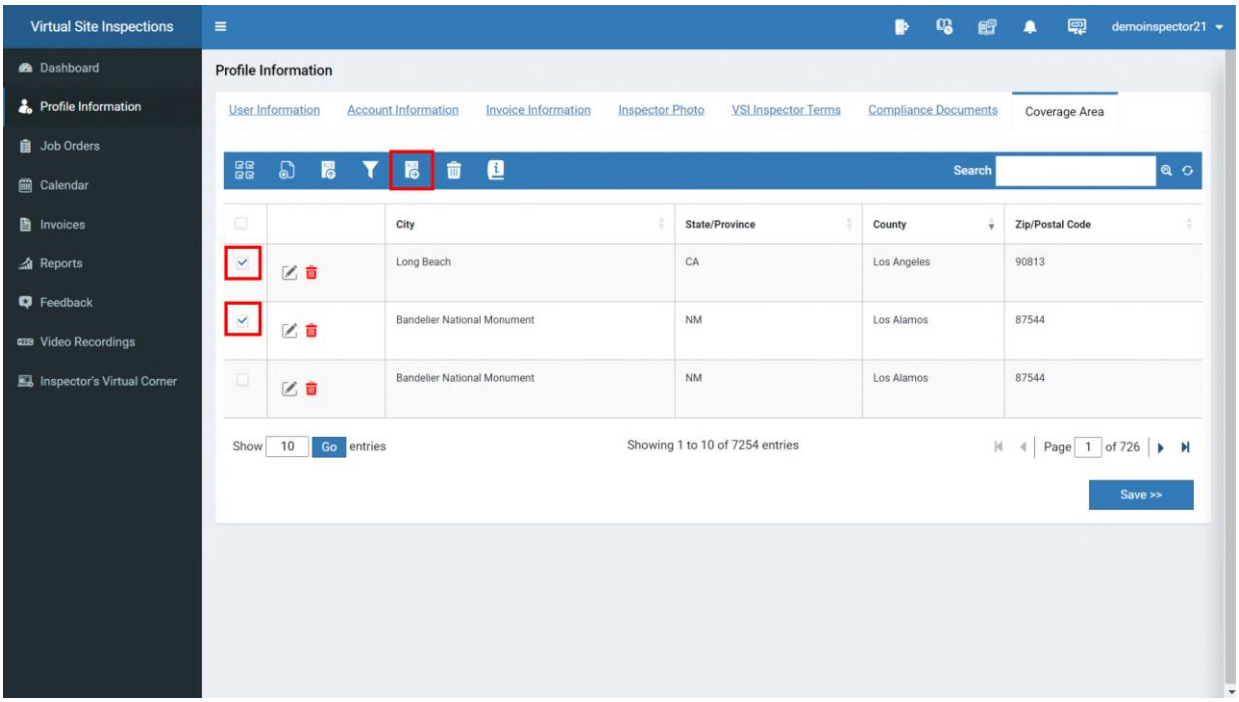
To export the coverage area, click on the 'Export to XLS' icon, as shown in the screenshot below.



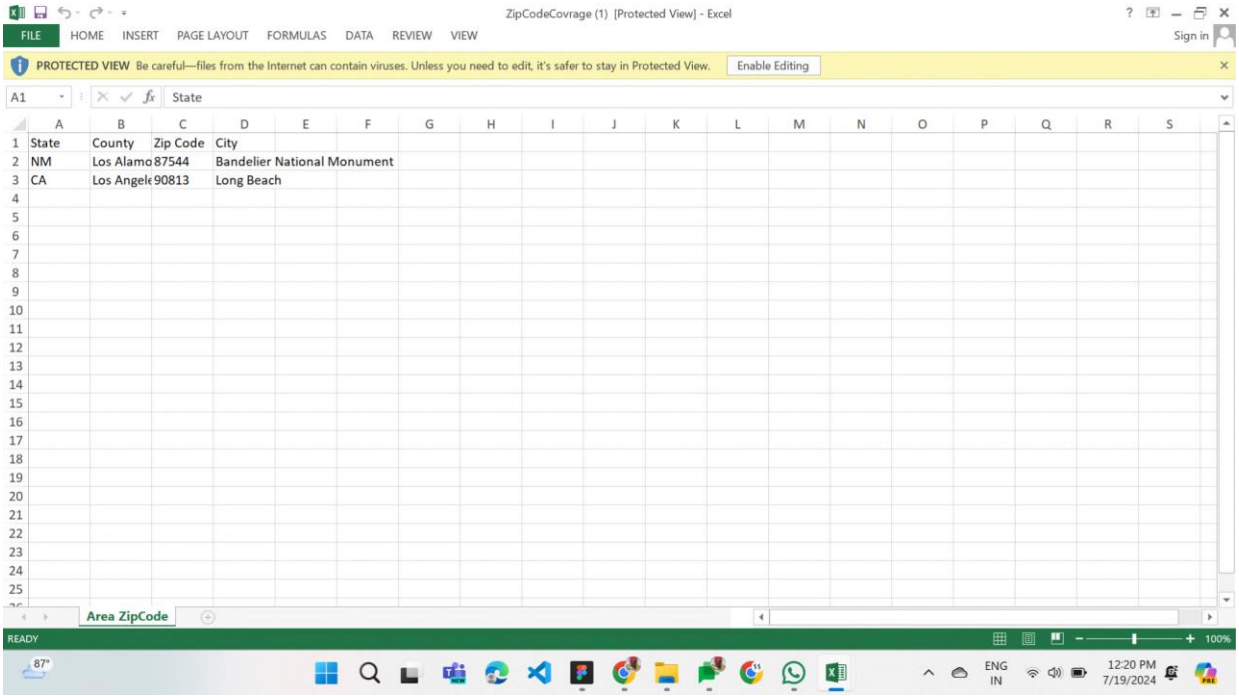
If you want to download all coverage areas, click on the 'Select All' icon, and then click on the 'XLS File' icon. This action will download an XLS file containing all the zip codes.



If you want to download a particular coverage area, select it and click on the 'Export XLS' icon.

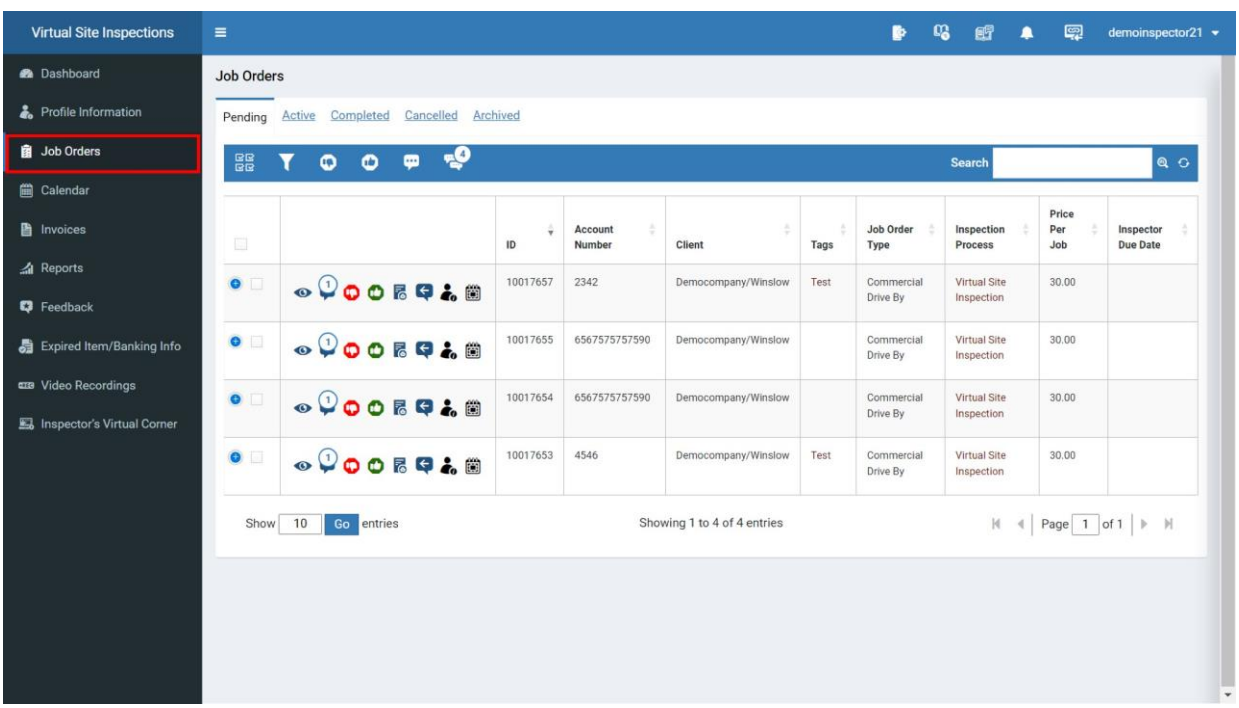


Here, you can view the data of the downloaded file.



Job Orders

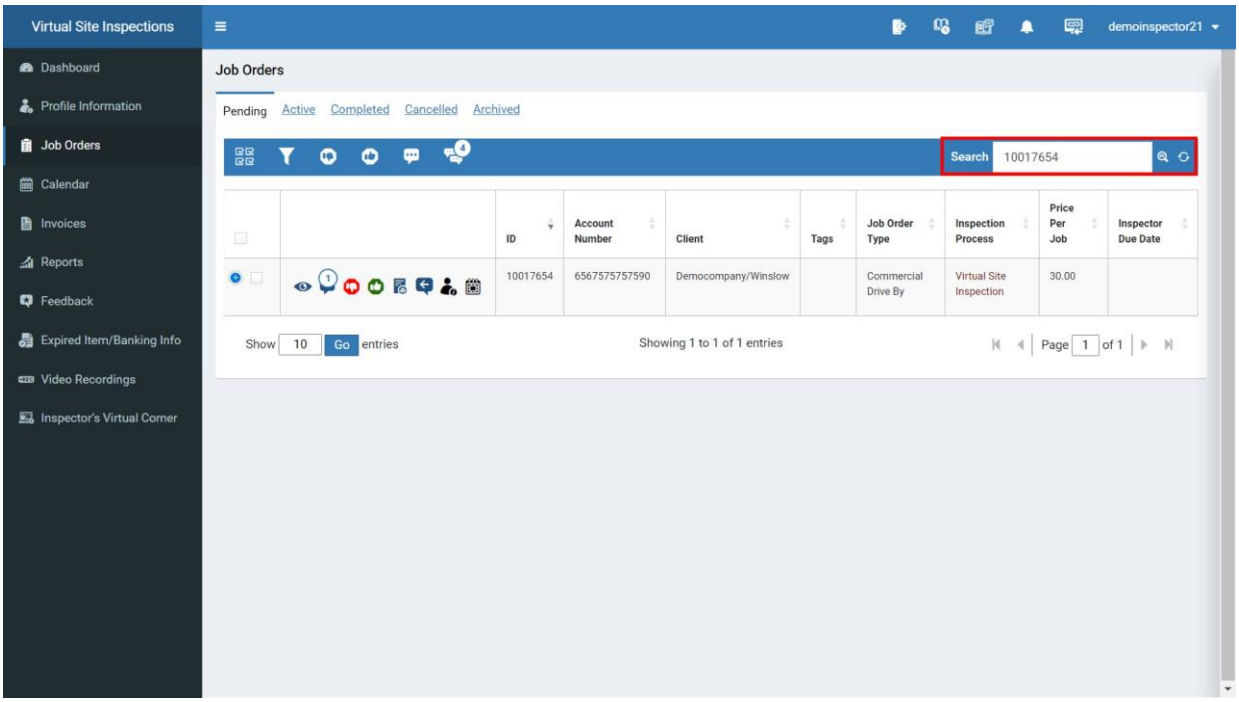
Inspectors can view job orders assigned to them by clicking on the 'Job Orders' menu in the left-side panel. This action redirects users to the Job Orders List page.



Within the job order, there are various tabs such as Pending, Active, Completed, Cancelled, and Archived. Clicking on a specific tab loads a corresponding job order list for that status and displays blue header options based on the selected status.

The Job Order List encompasses various functionalities, such as view orders, edit orders, decline orders, accept orders, accessing property details, viewing user information, share link, booking appointments, checking special instructions, downloading available documents, providing decline reasons, and sending appointment links. These functionalities are presented based on specific tabs.

To search for a job order using a keyword, the system performs the search across various parameters, including Transaction ID, Account Number, client, tags, job order type, company name, cell phone, onsite email contact, address, city, state, county, and zip code. Enter your search term in the highlighted search field, as illustrated in the provided screenshots, and then press enter or click on the finder icon next to the text field. The system will then display a list of relevant job order records.



Pending Tab

The "Pending" tab displays job orders assigned to inspectors by the administrator. When selecting the "Pending" status, the blue header bar presents options including "Select All", "Filter", "Accept", "Decline order", "Message" and "Message Count".

Select All

The "Select All" option is utilized to select all job orders within the respective tab. When you click on the "Select All" option, it will automatically mark all the job orders listed in that particular tab.

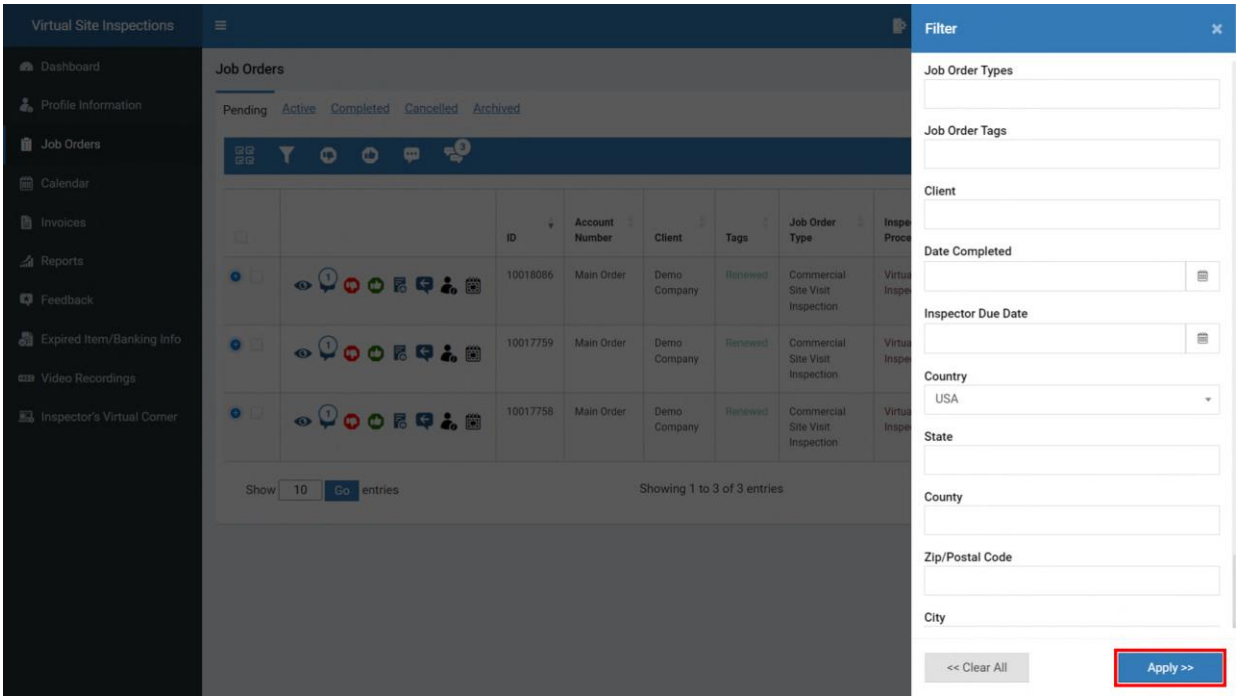
Filter

Filters functionality includes fields such as Job Order Types, Job Order Tags, Client, Country, State, County, Zip/Postal Code, City, and Inspector Due Date,Date completed. Users can select values from the dropdown menus for Client, Country, State, County, Zip/Postal Code, City, Job Order Types, and Job Order Tags.

For the Inspector Due Date and Date Completed, users can choose a value from the date picker, specifying a specific range from the "From" date to the "To" date.

Additionally, there is an interconnected feature: if a country is selected, the state dropdown will dynamically load options based on the chosen country. Similarly, selecting a state will load options for county and zip code or postal code will dynamically load options based on the chosen state.Similarly, selecting a county will load options for city and after selecting city will dynamically load options for zip code/ postal code. This interconnected filtering system enhances the precision of selecting criteria in the "Pending" tab.

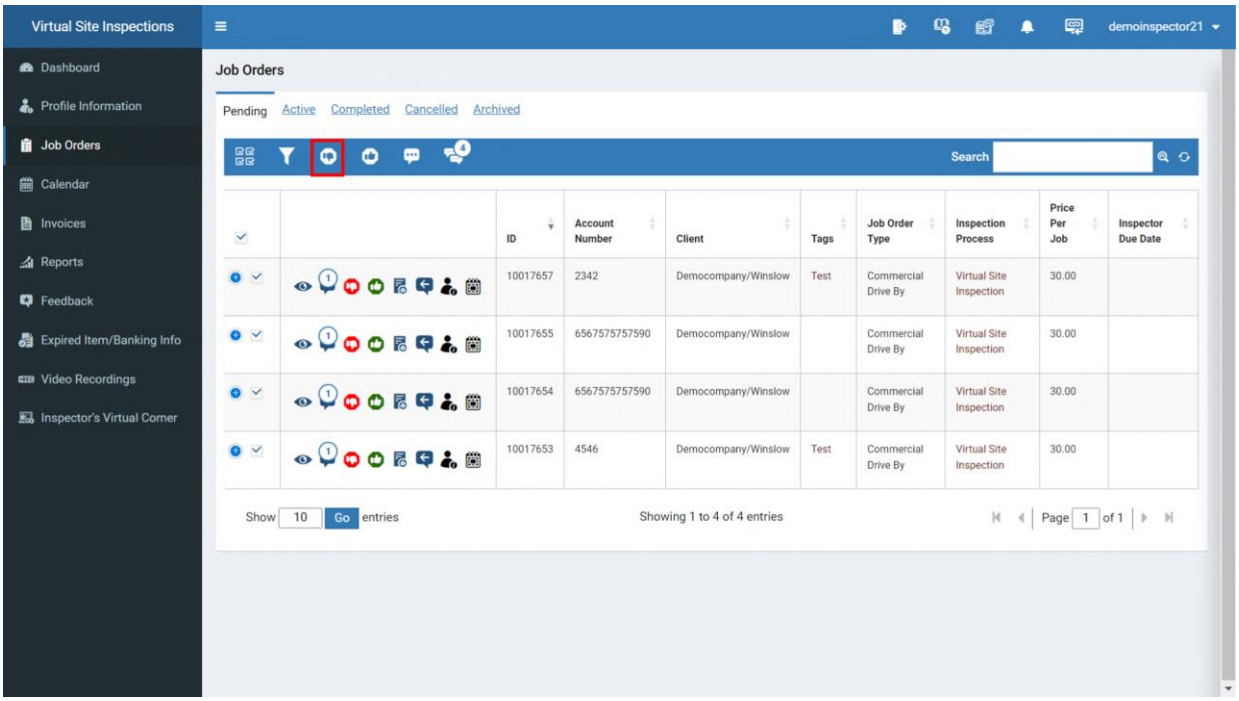
Upon selecting values from the filters, click on the "Apply" button. This action will retrieve and display relevant job order data in the list based on the specified filter criteria.Conversely, clicking the "Clear All" button will reset both the job order list and the Filters fields, restoring them to their default states.



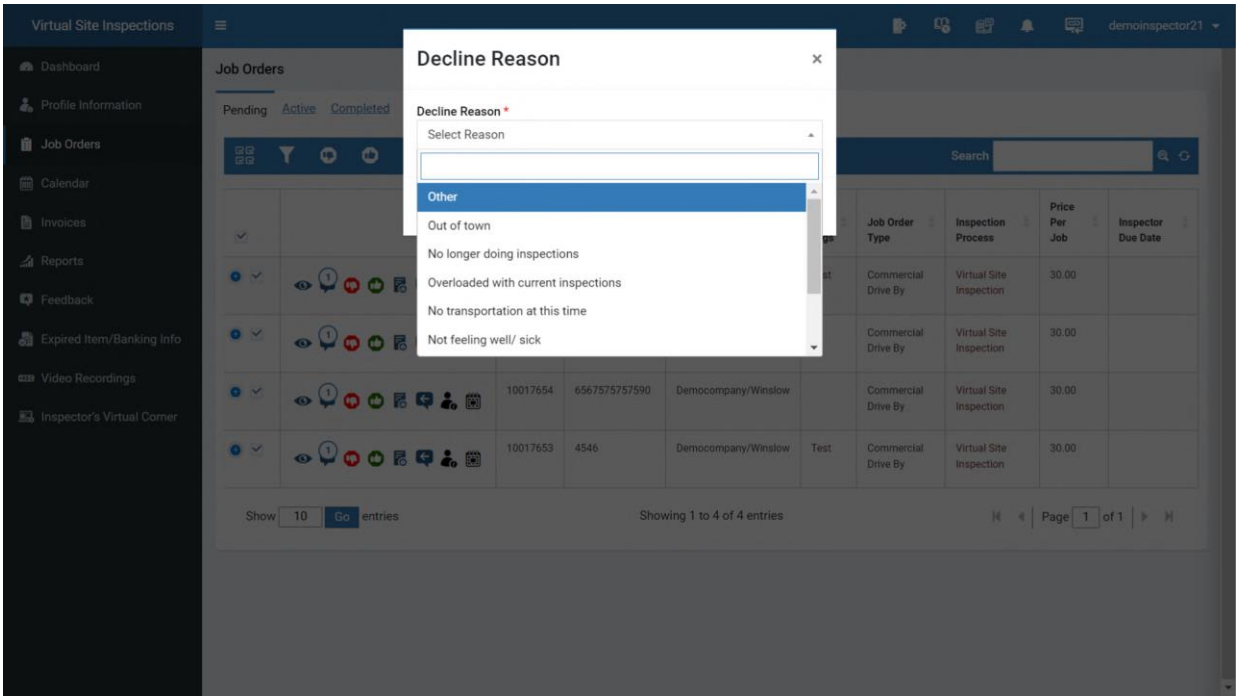
Decline Order

Inspectors have the ability to decline a job order if they choose to do so, utilizing the decline functionality.

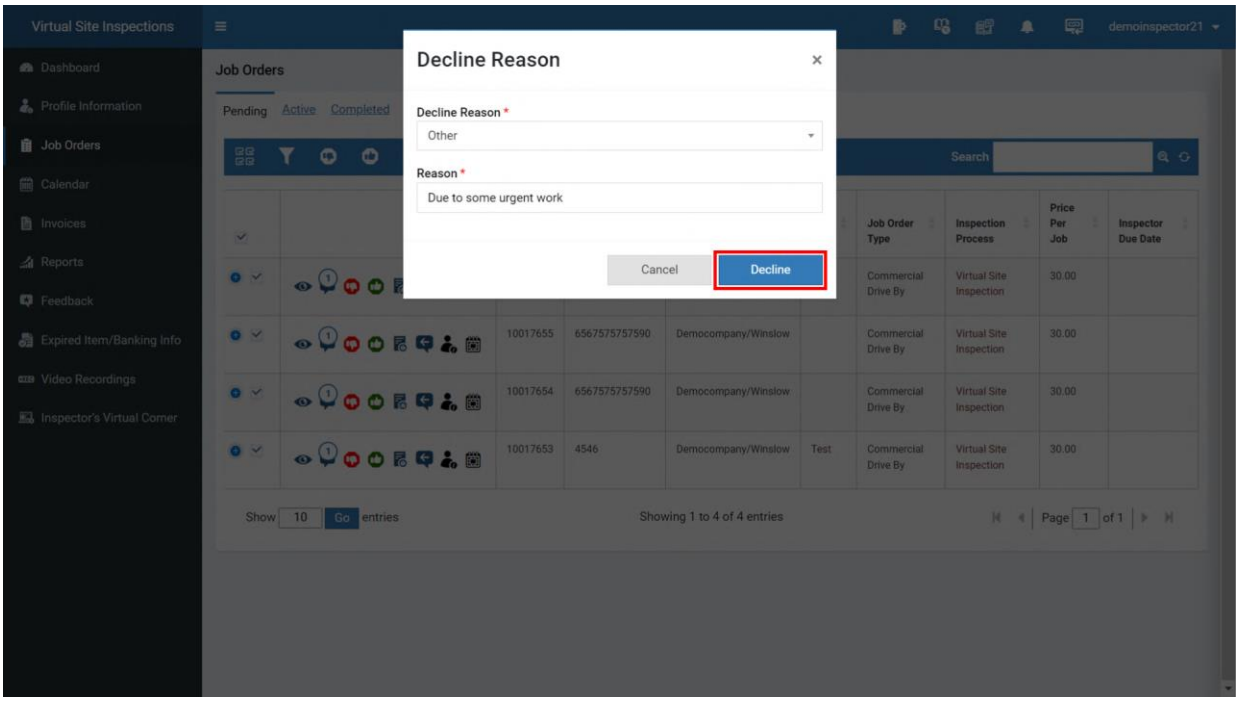
To decline job orders, select the desired orders and click on the decline icon located in the blue header bar.



After clicking on the decline icon, a dialog box will open. In this dialog, the inspector needs to select the reason for declining the job order. If a custom reason is desired, the inspector can choose the "Other" option.



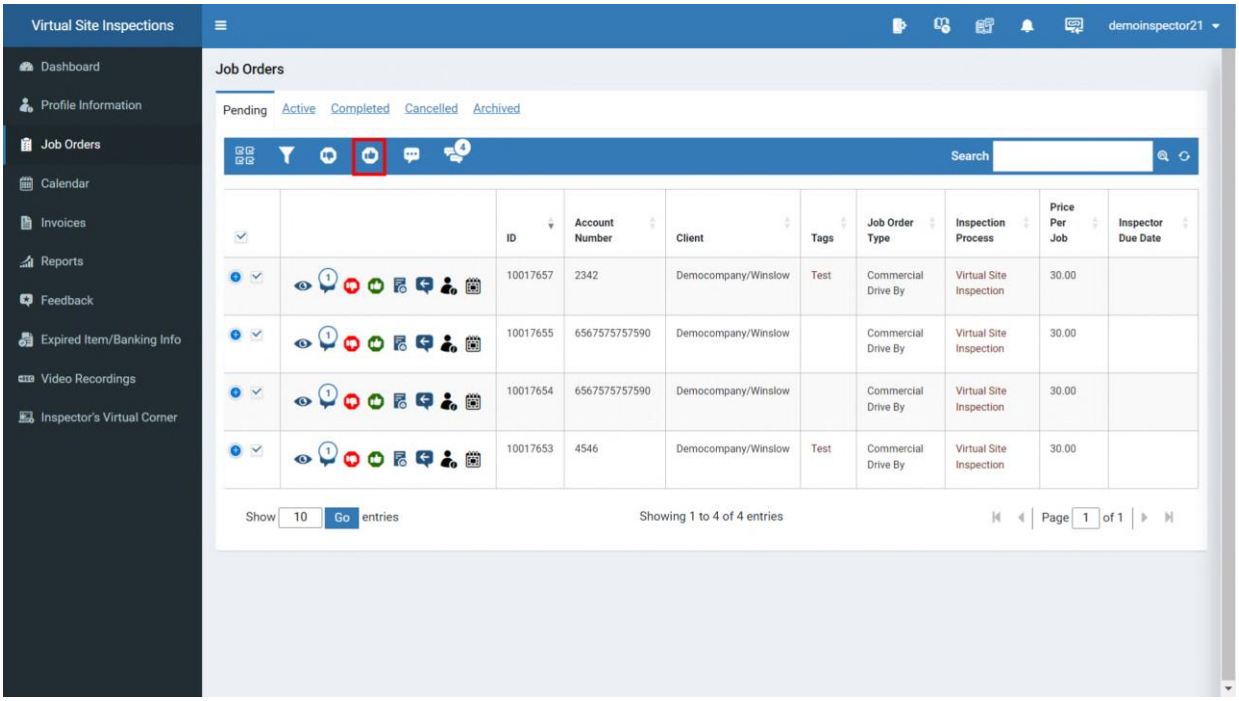
After selecting the "Other" reason, a label and text box will appear. Upon entering the custom reason, clicking on the decline icon will decline the order and it will return to the admin's new tab, automatically removing it from the pending tab.



Accept Orders

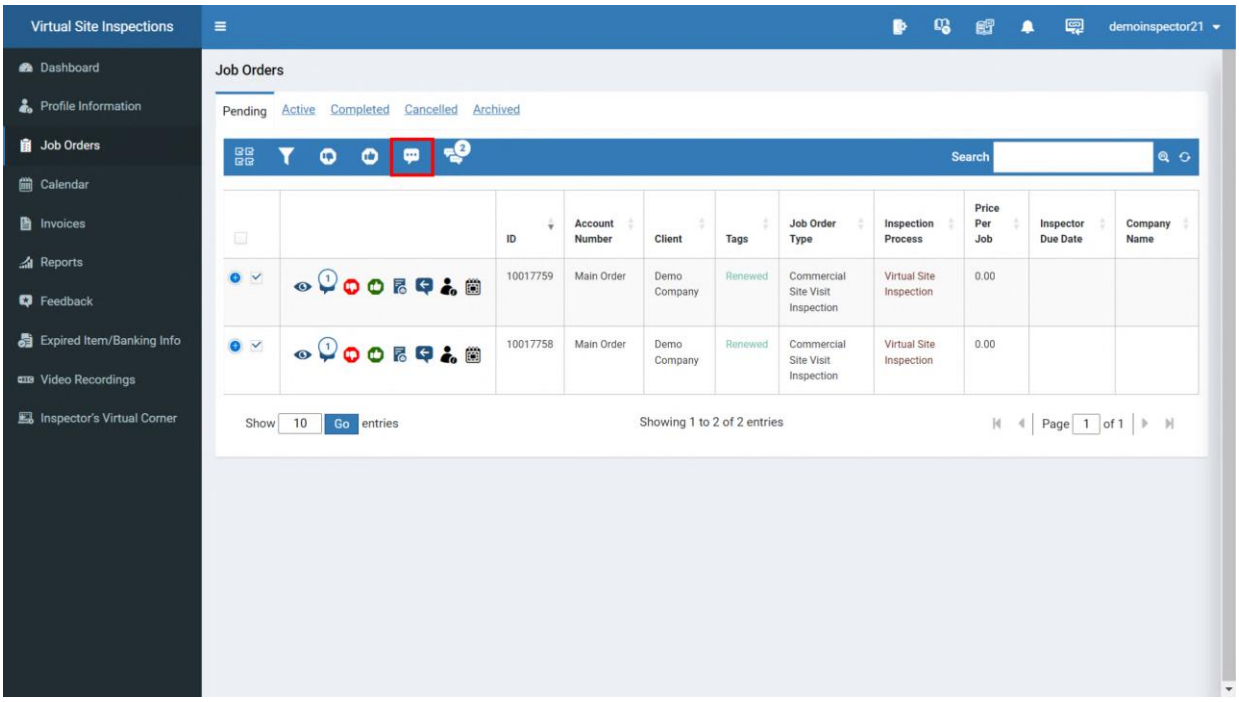
Inspectors have the ability to accept multiple job orders if they choose to do so, using the Accept Order functionality. To accept job orders, select the desired orders and click on the accept icon located in the blue header bar. By accepting the orders, you confirm your commitment to conduct the inspections associated with the job orders.

After clicking on the accept icon, all the selected job orders will be moved to the active tab.

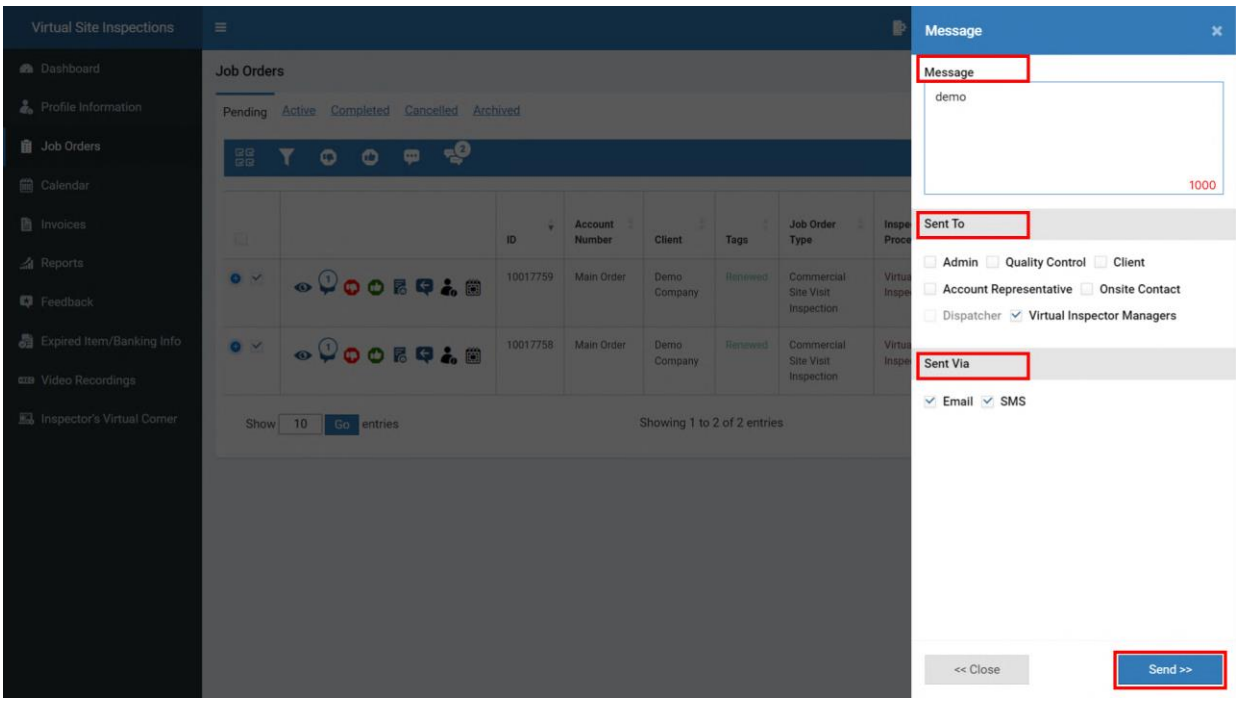


Message

The "Message" functionality allows users to send messages to various recipients such as Client, Quality Control, Account Representative, Admin. To send a message, you need to select more than one job order, and then click on the message icon, as illustrated in the provided screenshot.

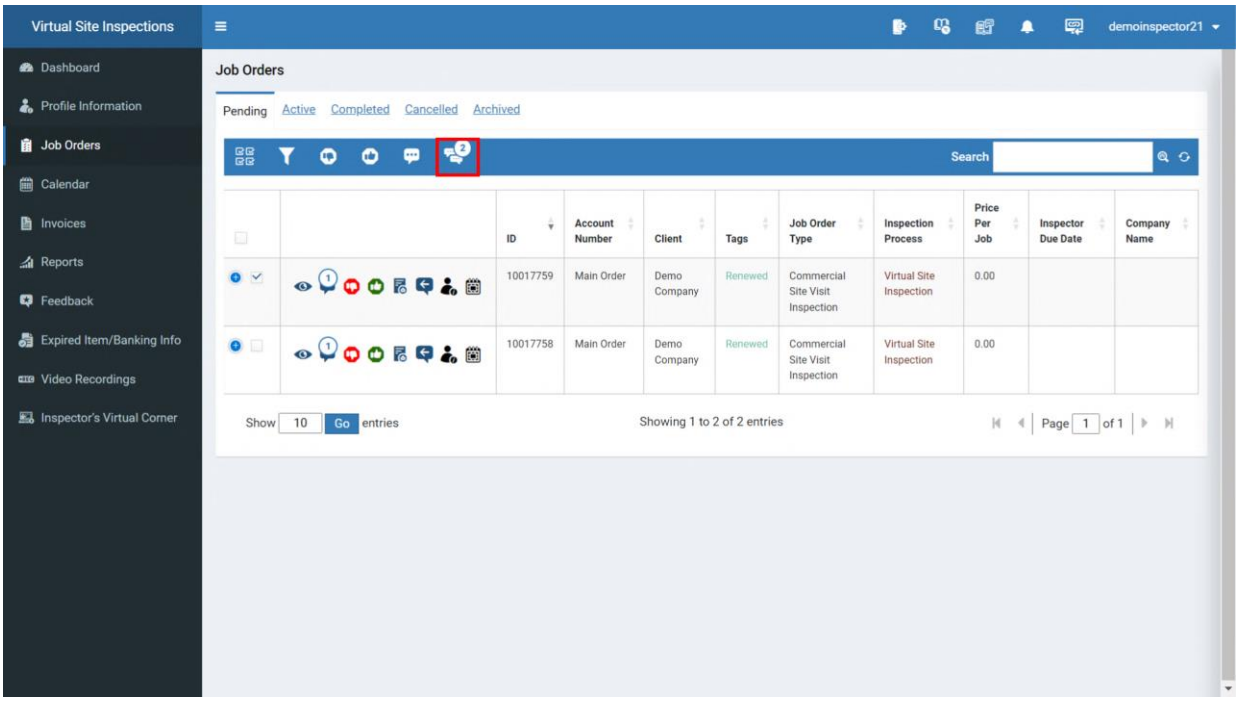


After clicking on the message icon, a pop-up will appear, prompting you to input the message content. In this pop-up, you can add your message and select the recipients from the "Sent To" section. Additionally, you can choose the channel through which the message will be sent by selecting the appropriate option in the "Sent Via" section. Now, hit on the ‘Send >>’ button to send the message.



Message Count

The Message Count icon, visible within the job order list, serves as an indicator of incoming messages associated with each respective job order and is yet to view(Pending for view). When the user interacts with this icon and clicks on it, the system responds by revealing a list of job orders specifically tied to messages. This functionality allows users to efficiently access and manage job orders that have associated messages, enhancing the overall user experience, as illustrated in the accompanying screenshot.



Active Tab

When you click on the "**Active**" status, it shows job orders that have been accepted by inspectors.

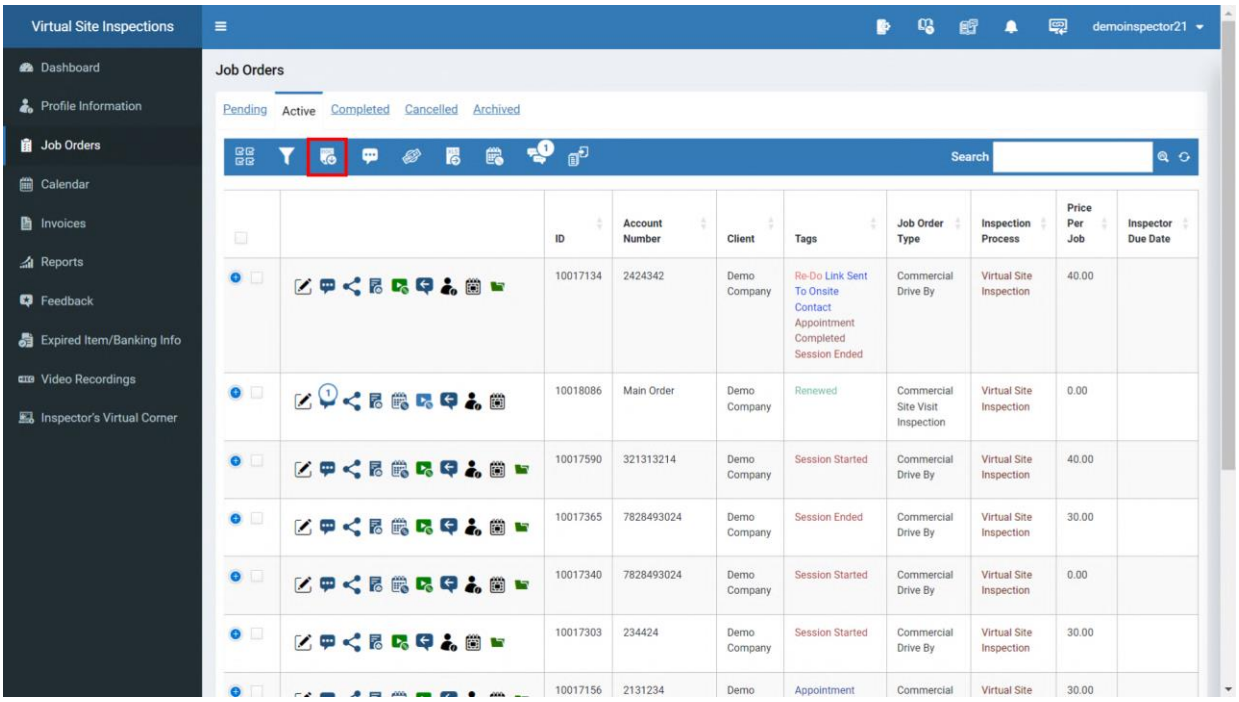
When selecting the "Active" status in the blue header bar, it offers options such as "Select All", "Filter", "Download Document", "Message", "Mark as Delay", "Export Job Orders", "Book Appointment" and "Message Count", “Move to New”.

Active Tab Filters functionality includes fields such as Country, State, County, Zip/Postal Code, City, Job Order Types, Job Order Tags, Client, Inspector Due Date. Users can select values from the dropdown menus for Country, State, County, Zip/Postal Code, City, Job Order Types, Client, and Job Order Tags.

In the "Active" tab, you can perform the same actions as explained above for the Pending tab for the fields: "Select All", "Filter", "Message" and "Message Count".

Download Document

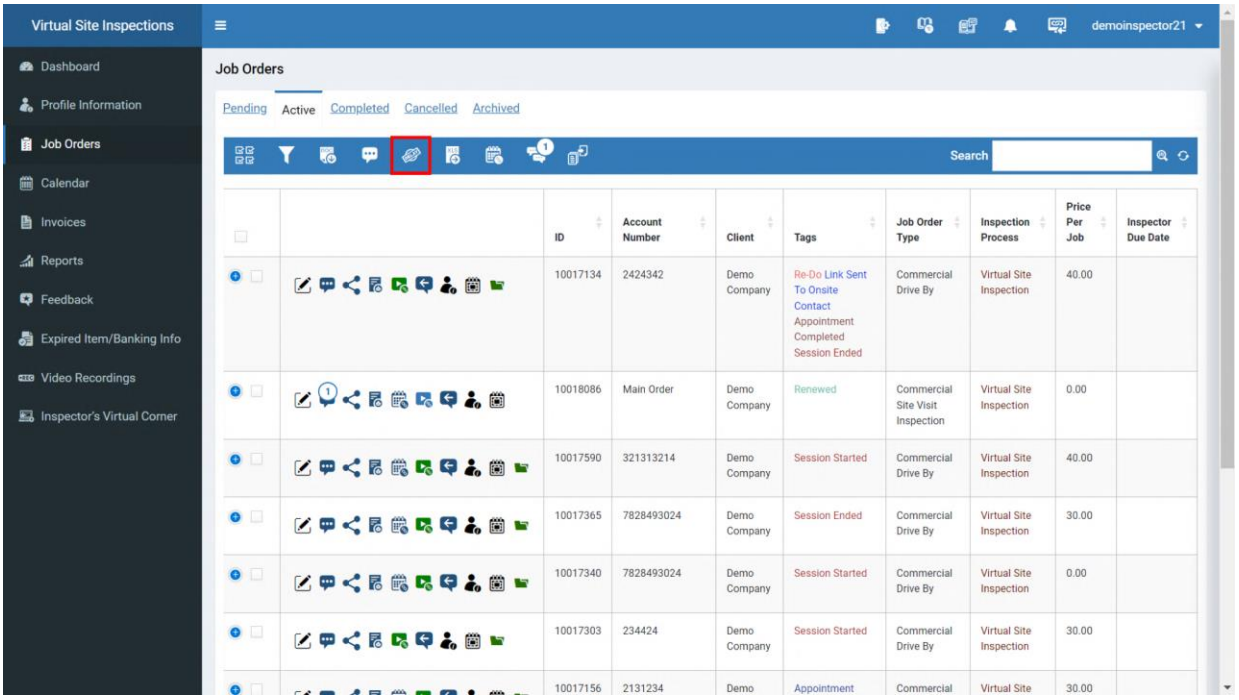
The "Download Document" feature lets you download all documents for a chosen job order. Simply select the job order, click "Download Document," and a zip file will download to your system. The files are neatly organized by job order ID. You also have the option to select and download documents for multiple job orders at once.



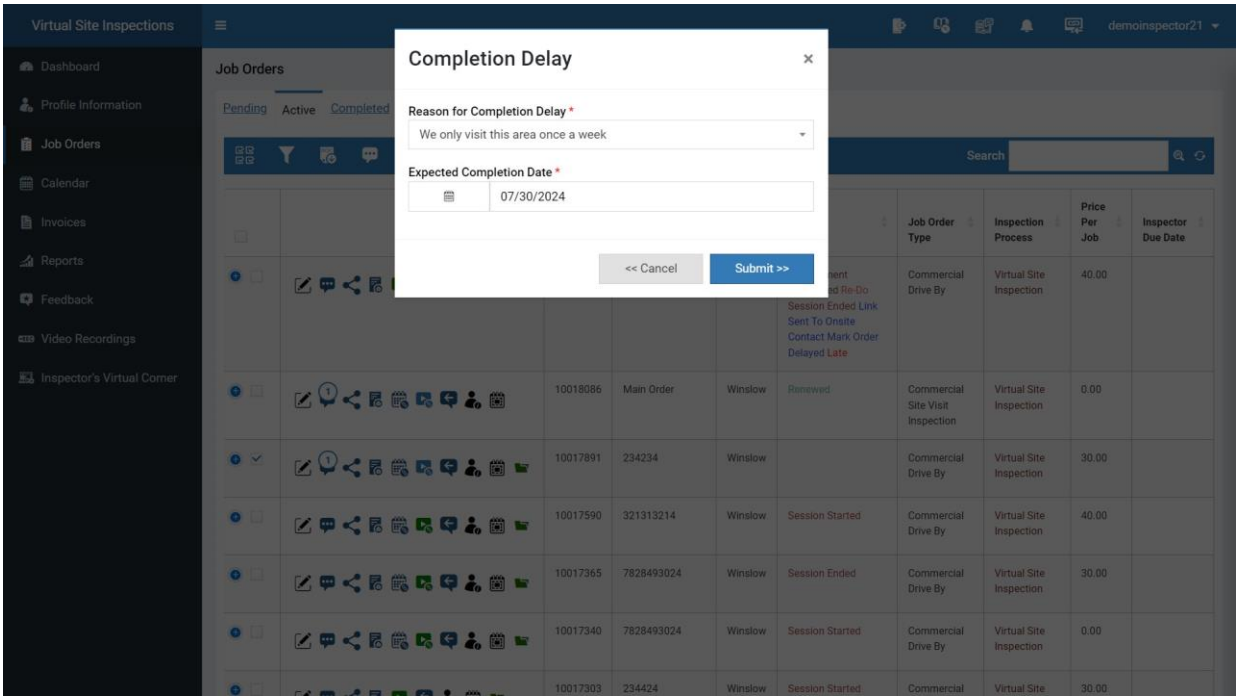
Mark As Delay

Inspectors can utilize this functionality to modify the completion date of an order.

To change the completion date of a selected job order, inspectors can click on the "Mark as Delay" icon.

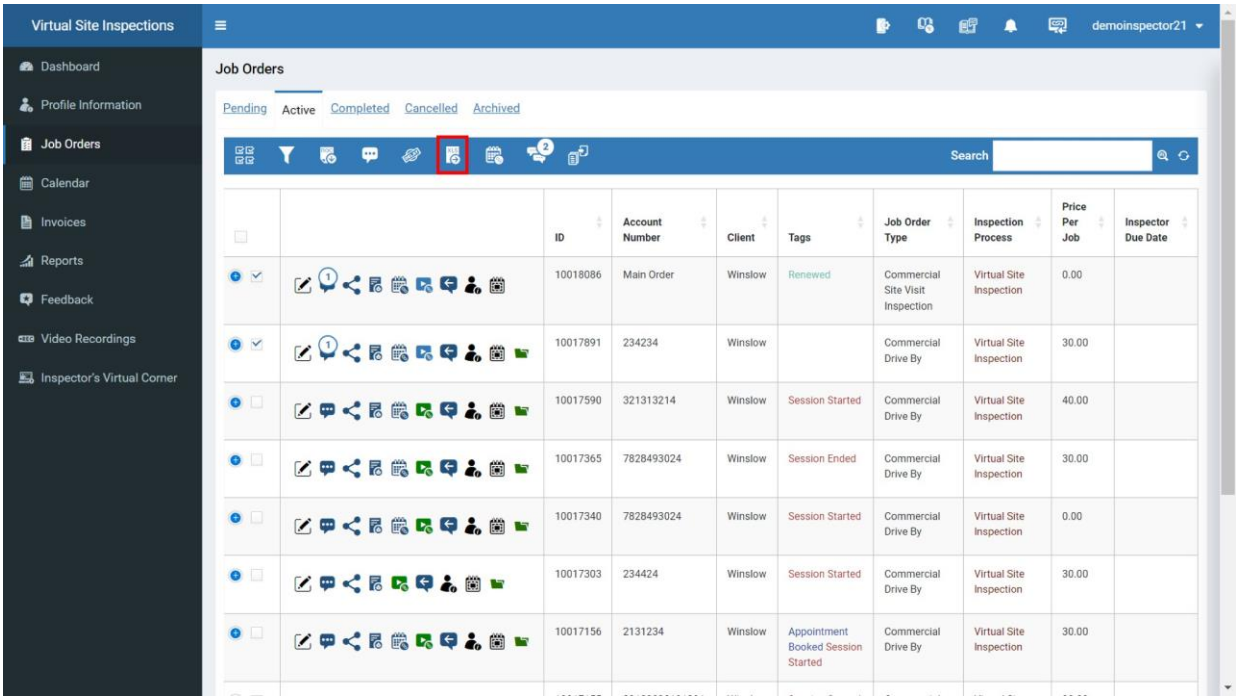


Clicking on the "Mark as Delay" icon will open a dialog box where inspectors can choose the reason for the completion delay and select the new date for the completed order. Upon selecting the necessary details, clicking the "Submit" button will update the completion date for that order.

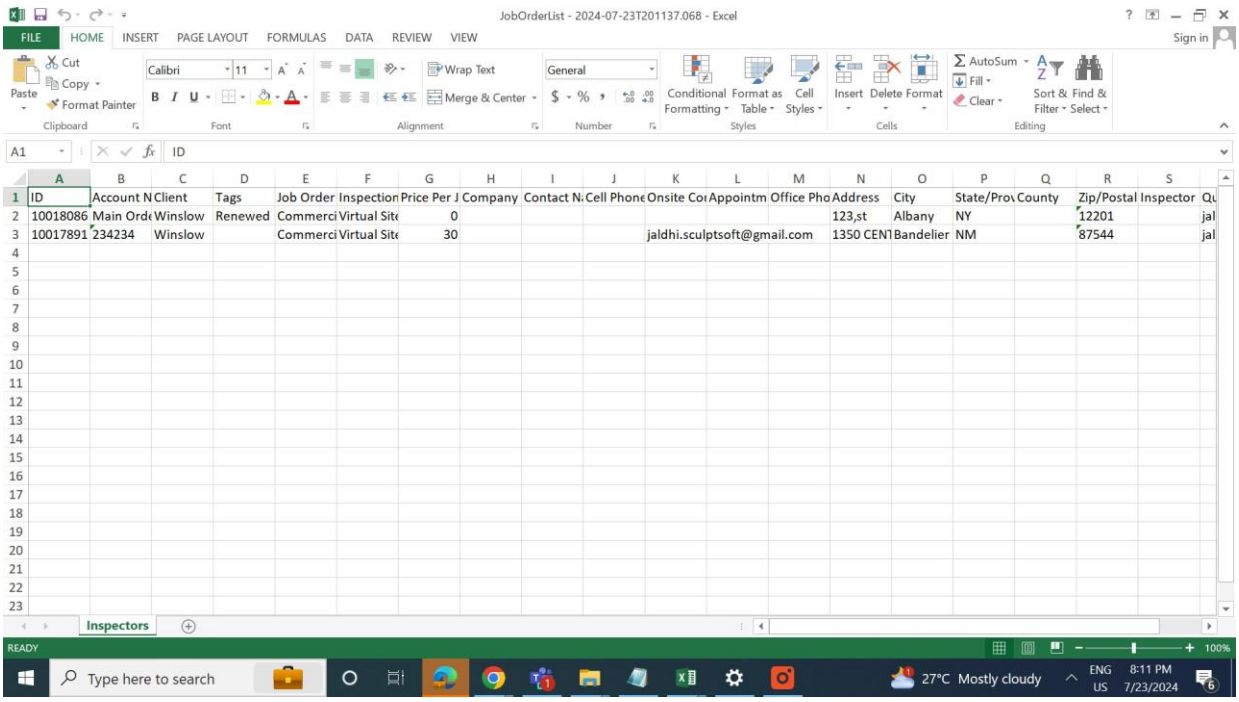


Export Job Orders

The "Export Job Orders" icon is utilized to download job order details in an XLS file format. It is mandatory to select at least one job order, and you also have the option to choose multiple job orders. If you wish to download the entire list, click on the "Select All" icon and then press the "Export Job Orders" icon. This action will generate an XLS file containing the information based on the selected job orders.



After clicking on the icon, it will download an XLS file to your system. You can preview the download in the screenshot below.

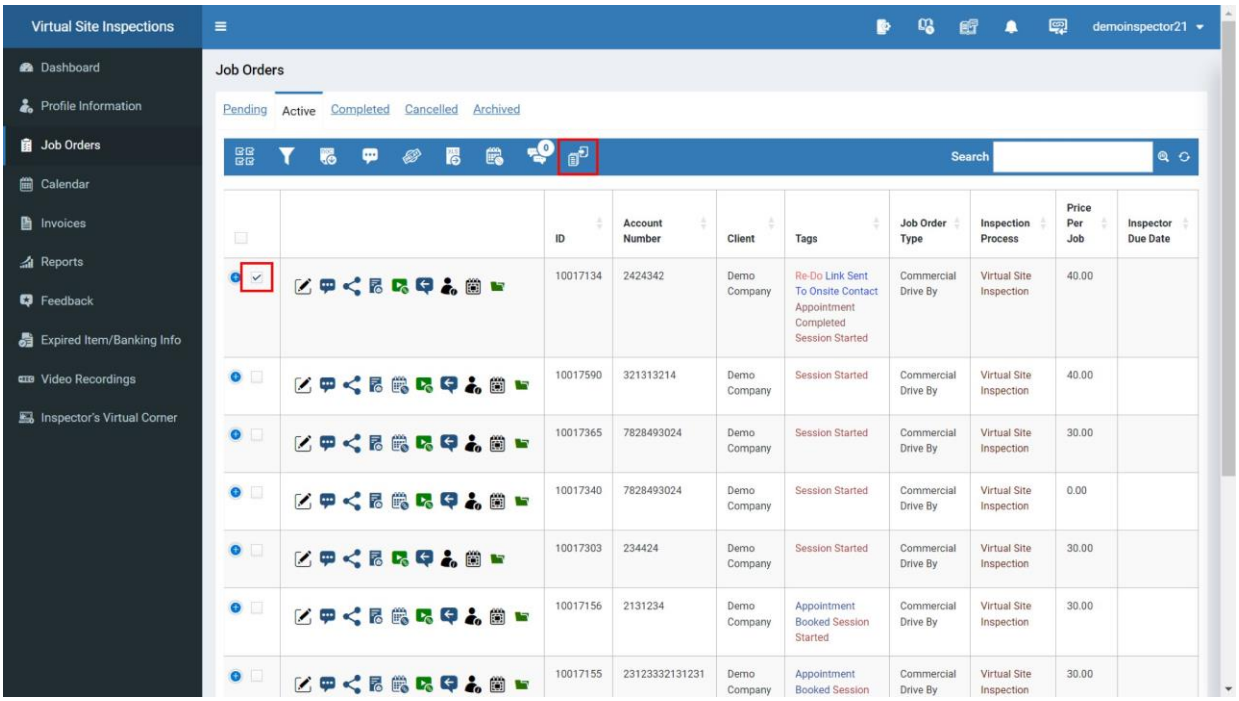


ID	Account N	Client	Tags	Job Order	Inspection	Price Per J	Company	Contact N	Cell Phone	Onsite Co	Appointm	Office Pho	Address	City	State/Prov	County	Zip/Postal	Inspector	Qu
10018086	Main Ord	Winslow	Renewed	Commerci	Virtual Site	0							123,st	Albany	NY		12201		jal
10017891	234234	Winslow		Commerci	Virtual Site	30				jaldhi.sculptsoft@gmail.com			1350 CENT	Bandelier	NM		87544		jal

Move to New

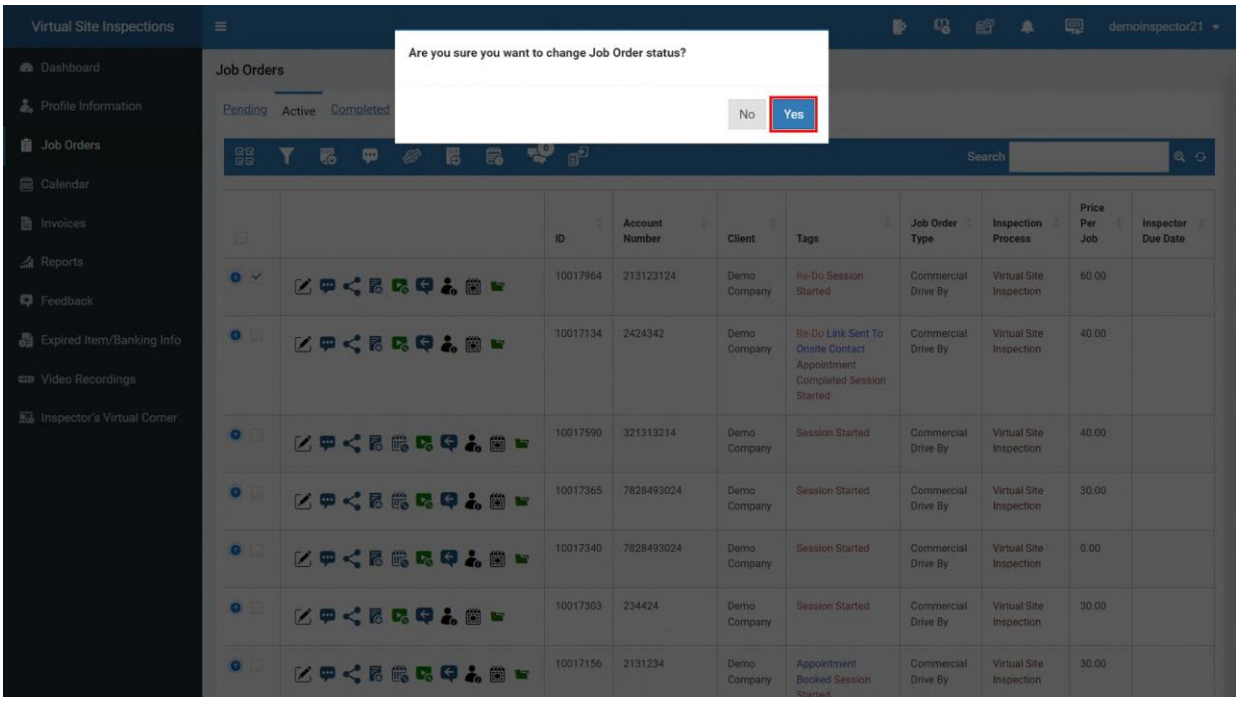
The Move to New function is utilized to change process type from Virtual to Field for job orders. This job order will display the new status in both the Admin and Dispatcher portals.

You can choose only one job order at a time. After selecting the desired job order, click on the "Move to New" icon located in the blue header, as illustrated in the screenshot below.



ID	Account Number	Client	Tags	Job Order Type	Inspection Process	Price Per Job	Inspector Due Date
10017134	2424342	Demo Company	Re-Do Link Sent To Onsite Contact Appointment Completed Session Started	Commercial Drive By	Virtual Site Inspection	40.00	
10017590	321313214	Demo Company	Session Started	Commercial Drive By	Virtual Site Inspection	40.00	
10017365	7828493024	Demo Company	Session Started	Commercial Drive By	Virtual Site Inspection	30.00	
10017340	7828493024	Demo Company	Session Started	Commercial Drive By	Virtual Site Inspection	0.00	
10017303	234424	Demo Company	Session Started	Commercial Drive By	Virtual Site Inspection	30.00	
10017156	2131234	Demo Company	Appointment Booked Session Started	Commercial Drive By	Virtual Site Inspection	30.00	
10017155	23123332131231	Demo Company	Appointment Booked Session	Commercial Drive By	Virtual Site Inspection	30.00	

Once you click the "Move to New" icon, a confirmation pop-up will appear. Clicking "Yes" will remove the order from your active tab and display it in a new tab in the Admin and Dispatcher portals as a field order.

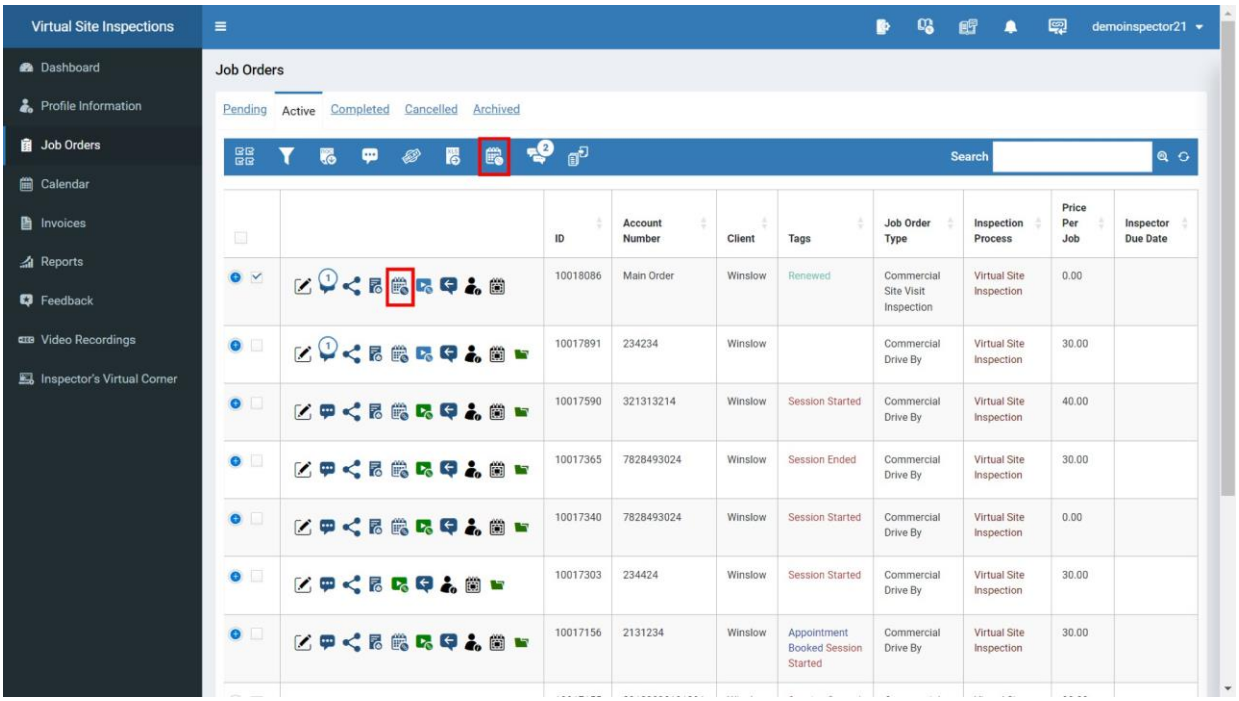


Book Appointment

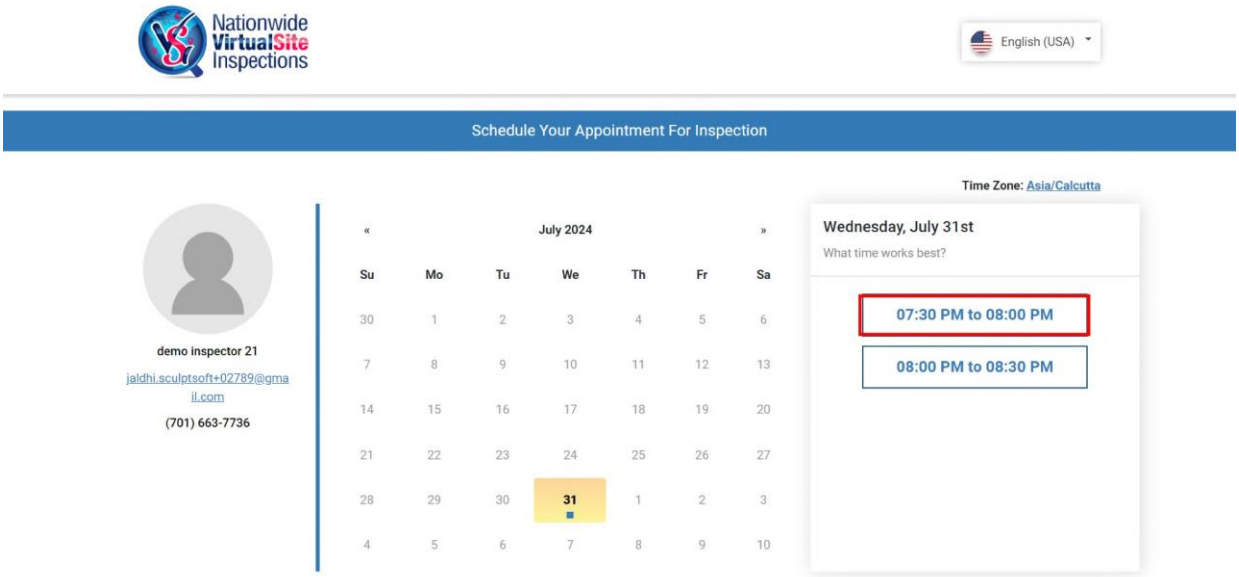
The "Book Appointment" functionality is utilized to schedule appointments with the onsite contact. It is booking the appointment date and time on behalf of the onsite contact.

To book an appointment, only select job orders containing the "Send Appointment Link" icon. You can choose only one job order at a time. After selecting the desired job order, click on the "Book Appointment" icon located in the blue header, as illustrated in the screenshot below.

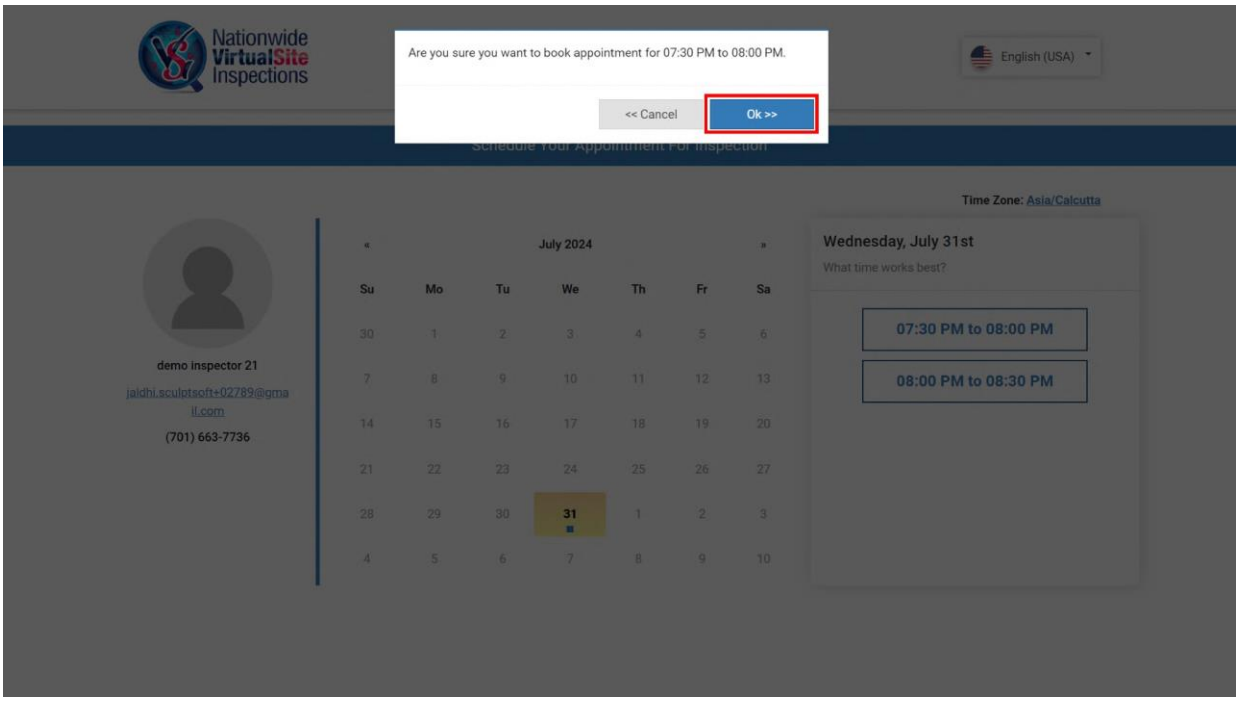
Note: To schedule an appointment for a specific date and time, the inspector needs to create a timeslot for that particular date in the calendar menu. Detailed information on calendar-related actions is covered later in the document, providing instructions on how to add a timeslot.



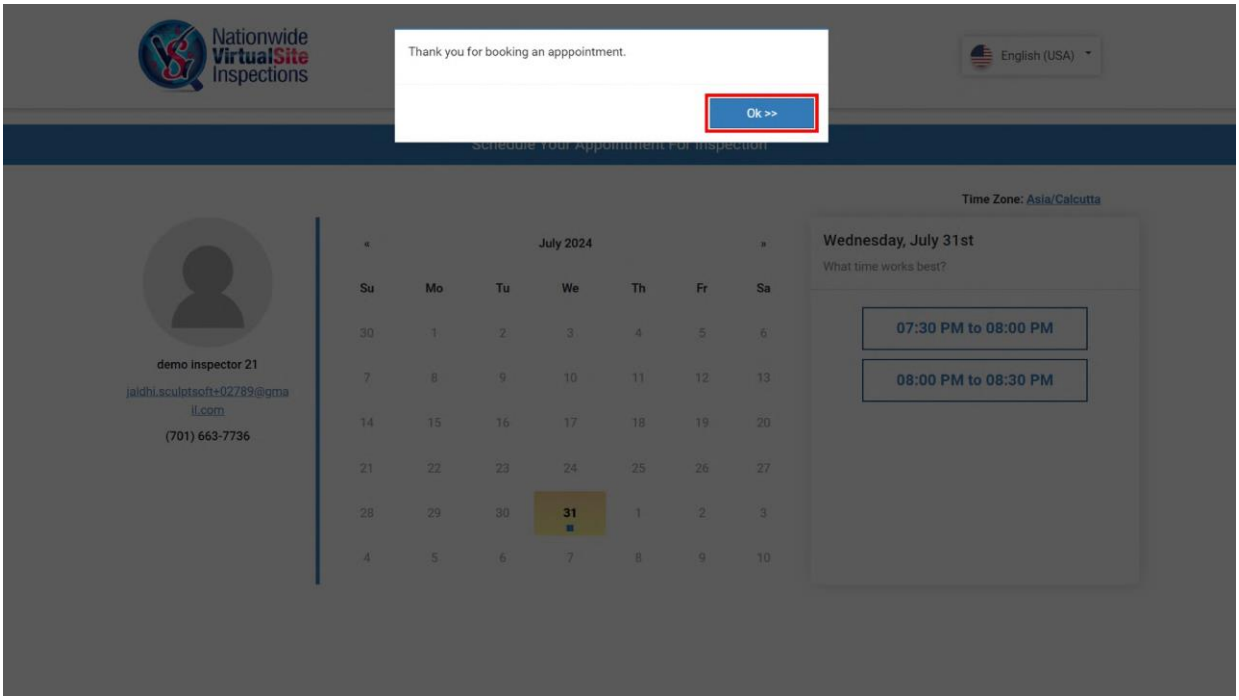
After clicking on the "Book Appointment" icon, the system will redirect you to the calendar page. On this page, you can view available slots listed. Choose the desired slot to book the appointment, as highlighted in the screenshot below.



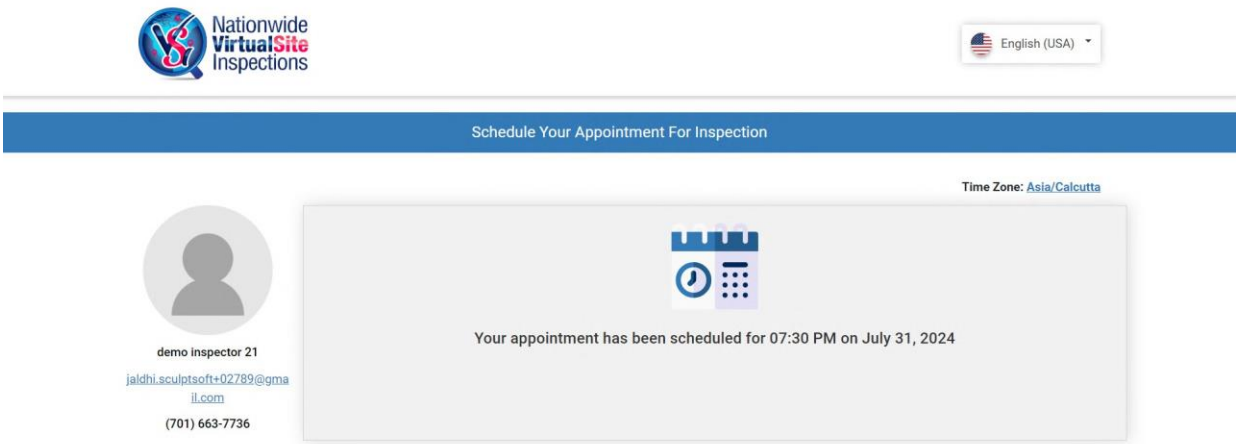
After clicking on the selected time slot, a dialog box will open to confirm the booking of the appointment. Clicking the "OK" button will proceed with the booking, while clicking the "Cancel" button will result in no action being performed.



After clicking the "OK" button, a "Thank You" dialog box will be displayed.



After clicking the "OK" button, the pop-up will be dismissed, and the system will redirect to the confirmation page.

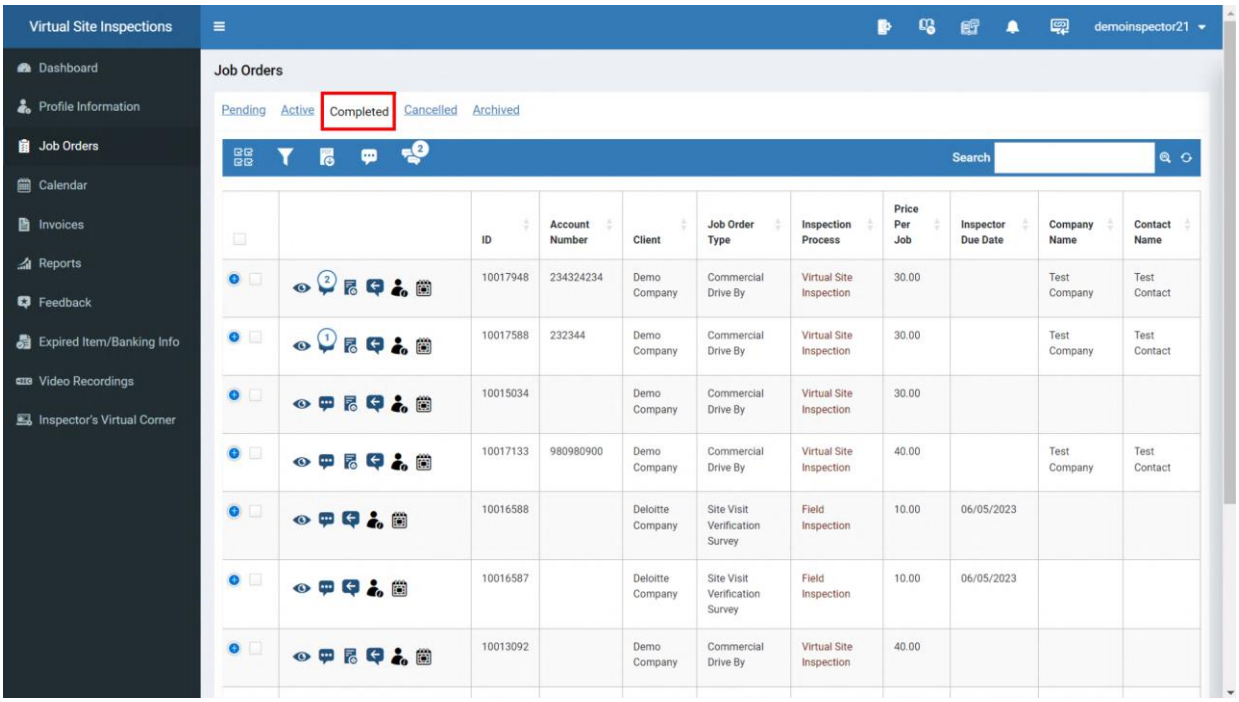


Completed Tab

When you select the 'Completed' status, it shows job orders that have been completed.

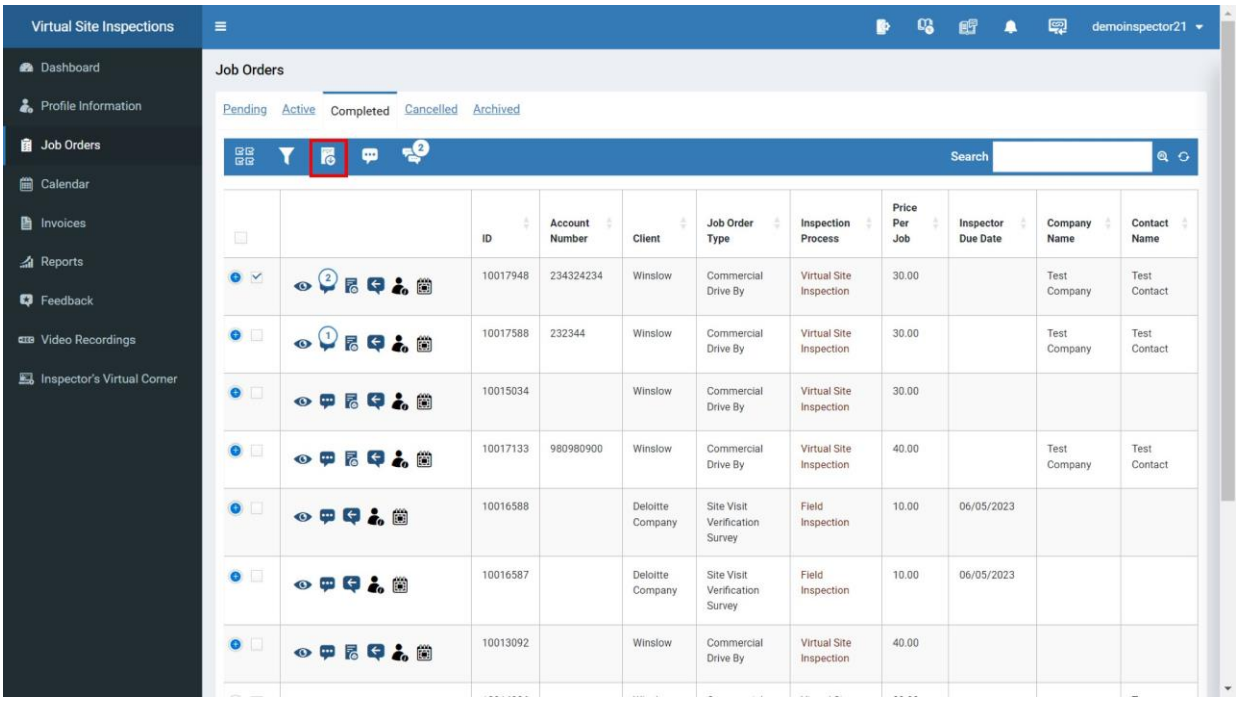
When selecting the "Completed" status in the blue header bar, it offers options such as "Select All", "Filter", "Download Selected PDF Reports", "Message" and "Message Count."

In the "Completed" tab, you can perform the same actions as explained above for the "Active" tab with regard to the fields: "Select All", "Filter", "Message" and "Message Count."

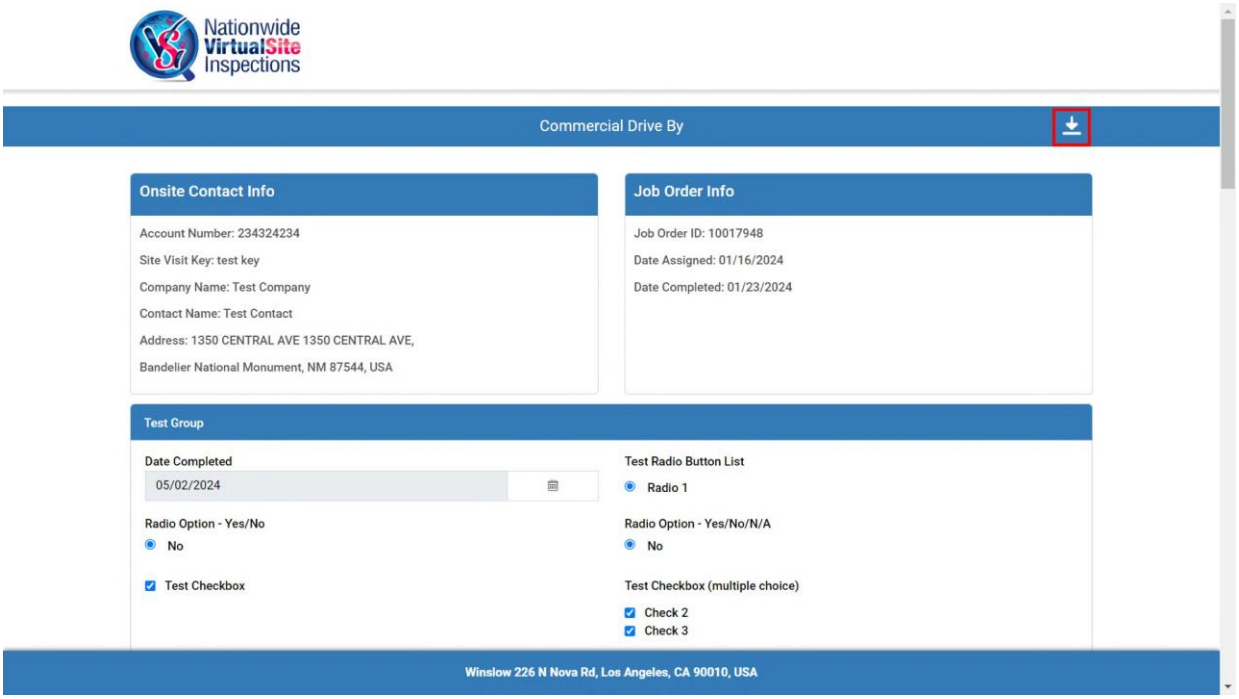


Download Selected PDF Reports

The "Download Selected PDF Reports" function is utilized to generate reports for job order. You can choose only one job order at a time. After selecting the desired job order, click on the “Download Selected PDF Reports" icon located in the blue header, as illustrated in the screenshot below.



After clicking on the "Download PDF Reports" icon, the system will redirect you to the report opened in a new tab, allowing you to view and download it directly from that tab. To download the PDF report click on the ‘Download’ icon highlighted in the screenshot below.

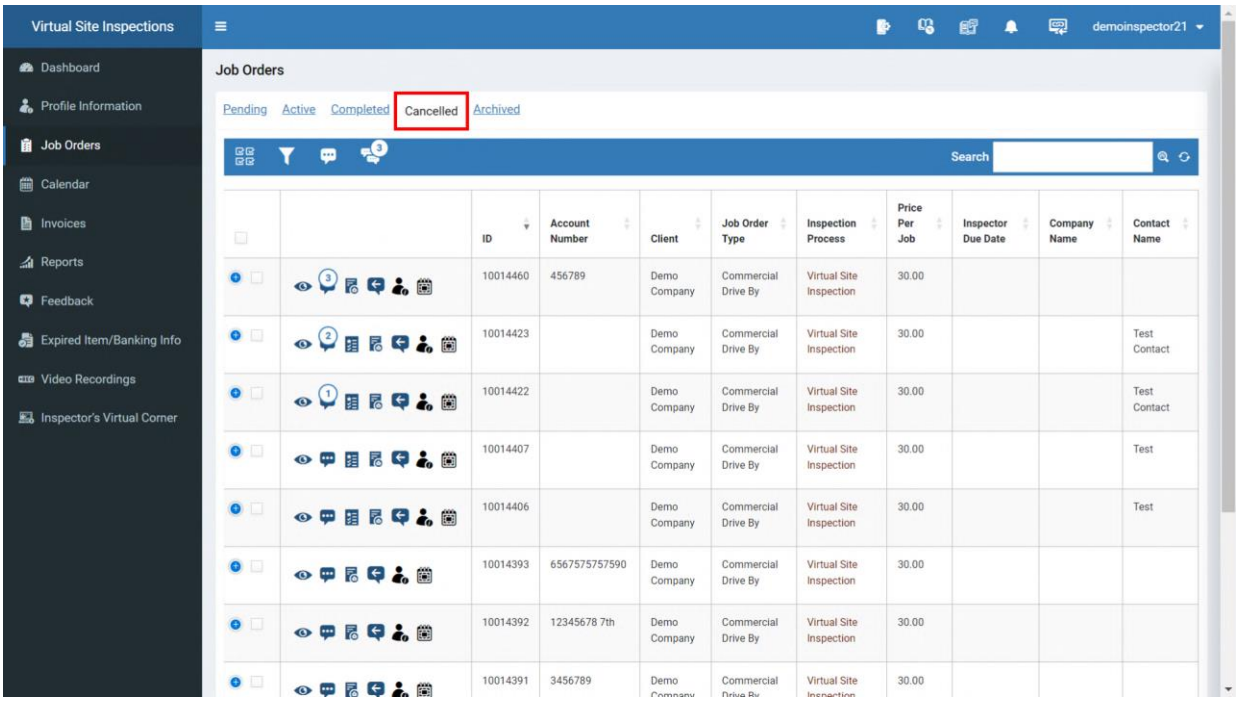


Cancelled Tab

When you choose the "**Cancelled**" status, it shows job orders that have been canceled Approved by the administrator.

When selecting the "Cancelled" status in the blue header bar, it presents options such as "Select All", "Filter", "Message" and "Message Count."

In the "Cancelled" tab, you can execute the same actions as described for the "Active" tab concerning the fields: "Select All", "Filter", "Message" and "Message Count."

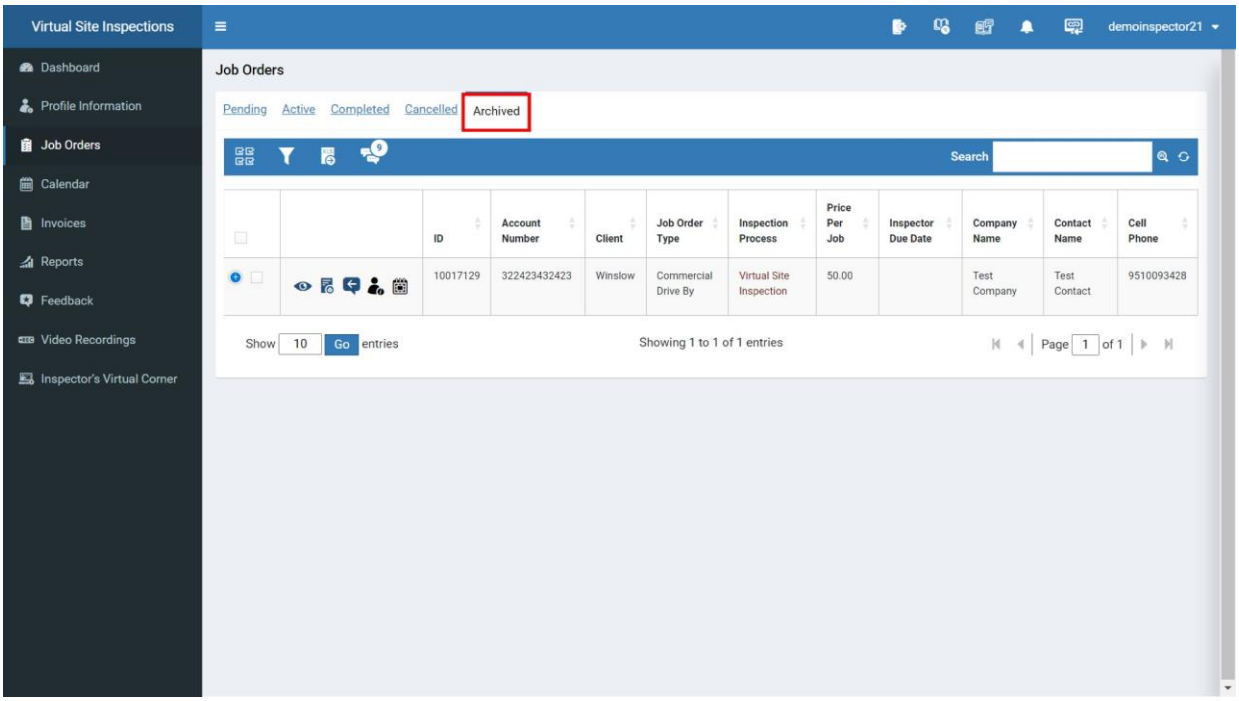


Archived Tab

When you choose the "**Archived**" status, it shows all job orders that have been archived by the administrator.

When we select the "Archived" status in the blue header bar, it provides options such as "Select All", "Filter", "Export Job Orders" and "Message Count".

In the "Archived" tab, you can perform the same actions as explained above for the Active tab for the fields: "Select All", "Filter", "Export Job Orders" and "Message Count".

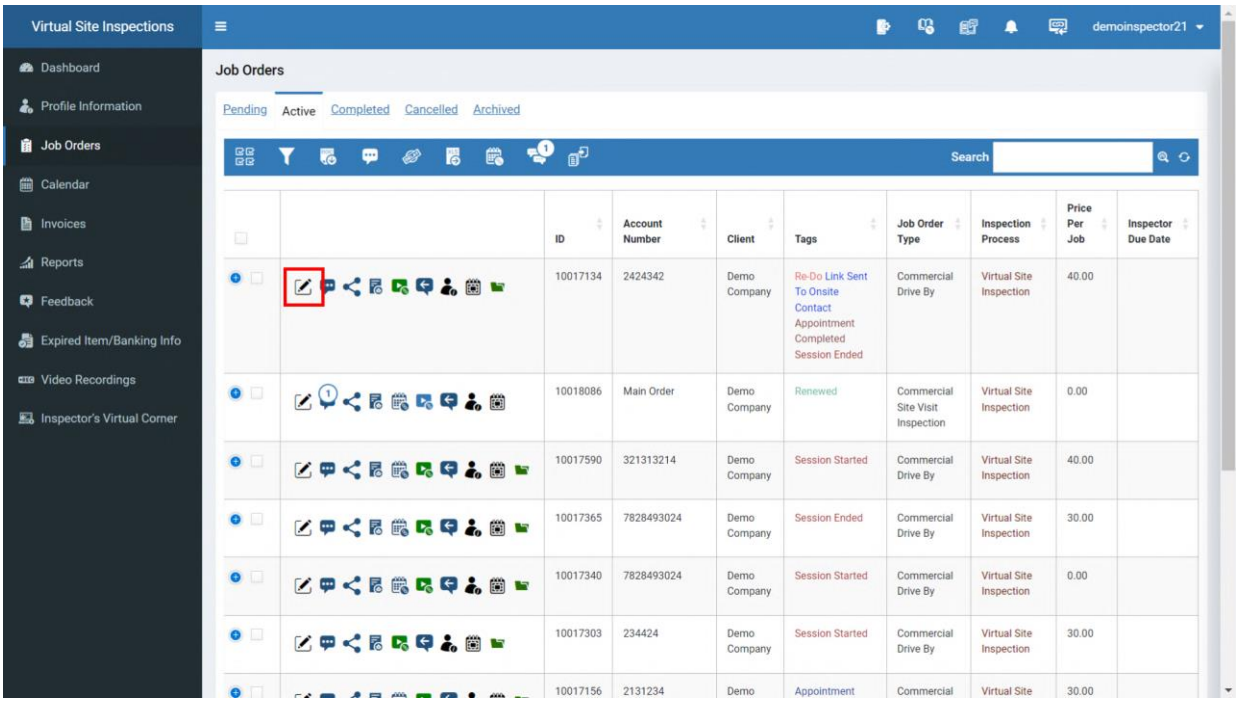


Job Orders Actions

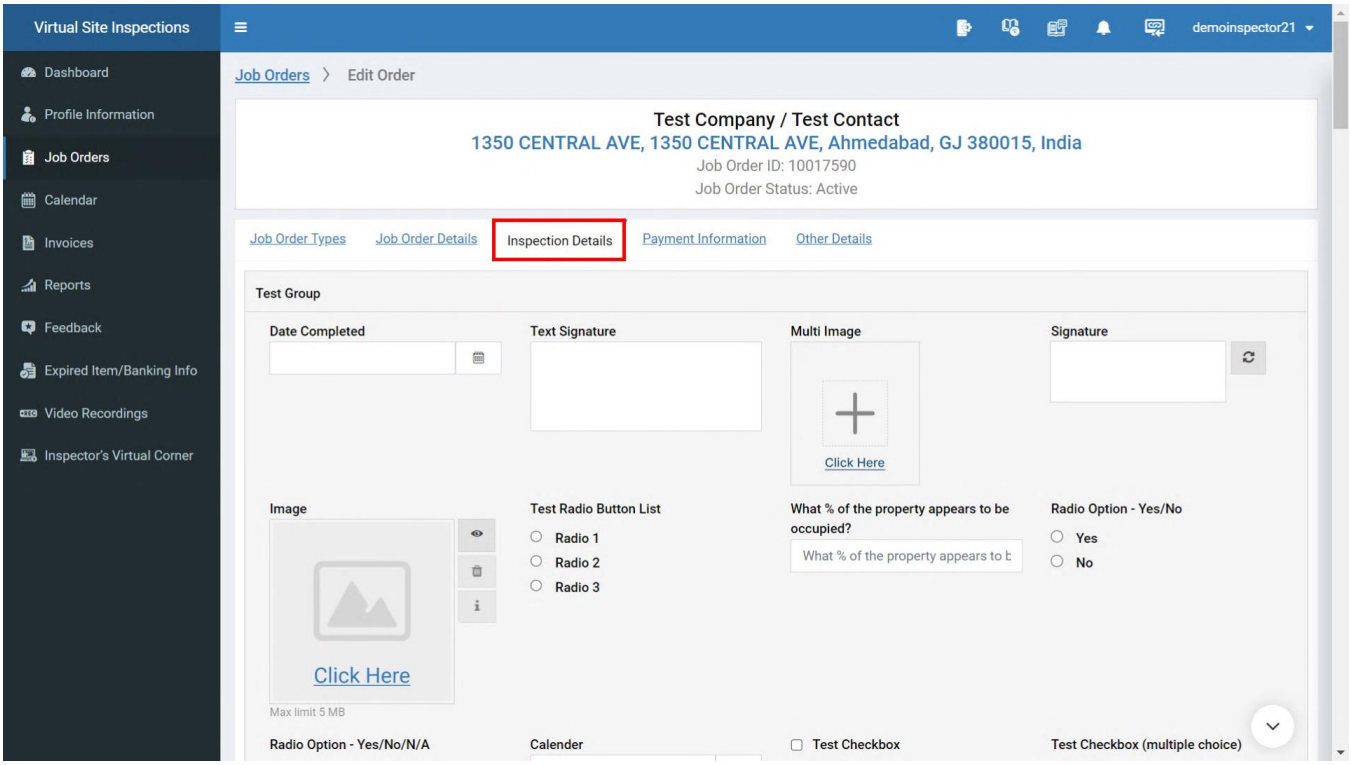
In a job order listing, you will find several icons in the first column, such as Edit Job Order, Messages, Link Share, Property Details, Send Video Call Link, Send Back Reason, Assign User Info, Appointment Date & Time, and Document Available for Download. You can use these icons to perform various actions.

Edit Job Order

The edit icon is utilized to modify the details of a job order.



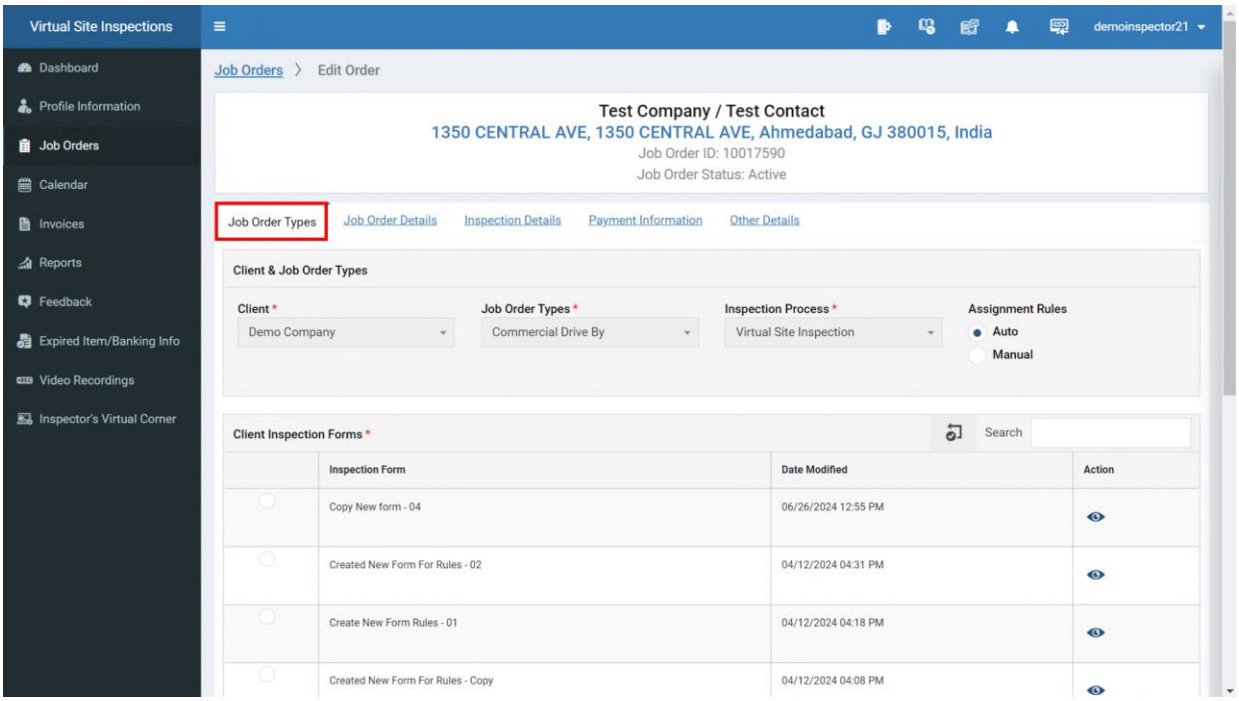
After clicking on the 'Edit' button, you will be directed to a new page where you can access five different sections: job order type, job order details, inspection details, payment information, and other details.



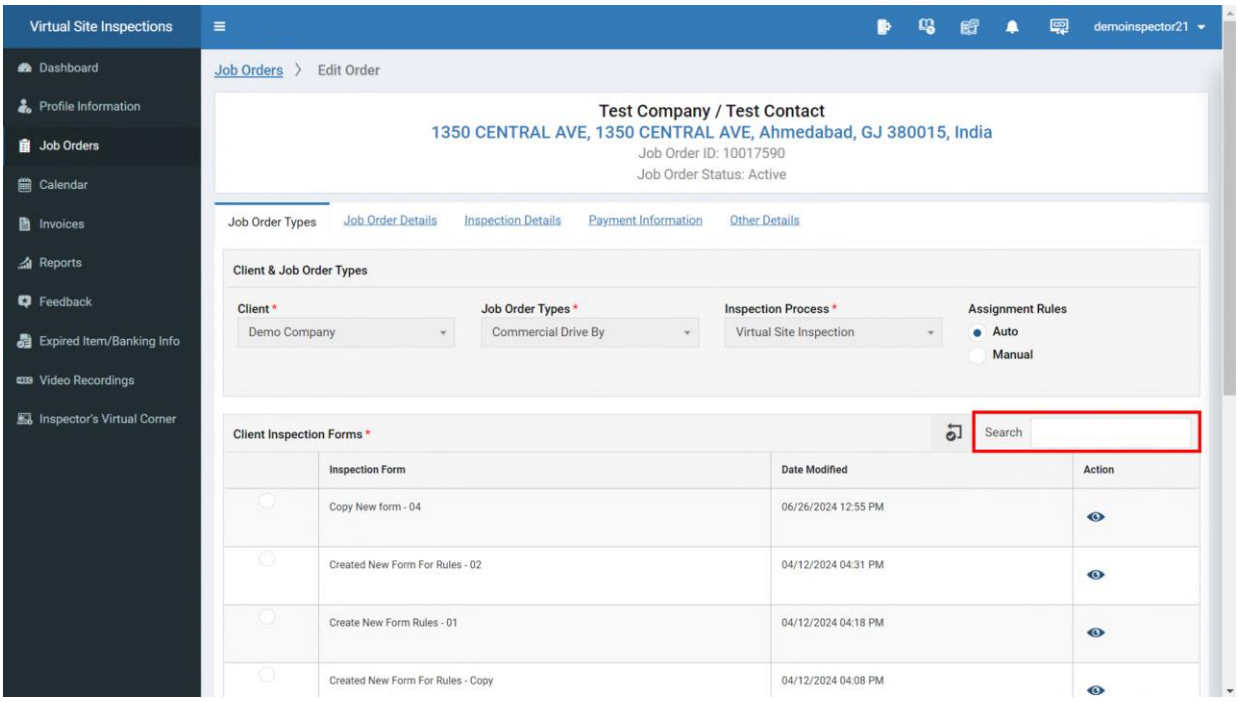
In the 'Job Order Type' section, there are two subsections: 'Client Job Order Types' and 'Client Inspection Forms.

In the 'Client Job Order Type' section, you will find several fields such as 'Client' which indicates the client's name for the job order, 'Job Order Type' representing the type of job order, 'Inspection Process' indicating the type of process, and 'Assignment Rules.'

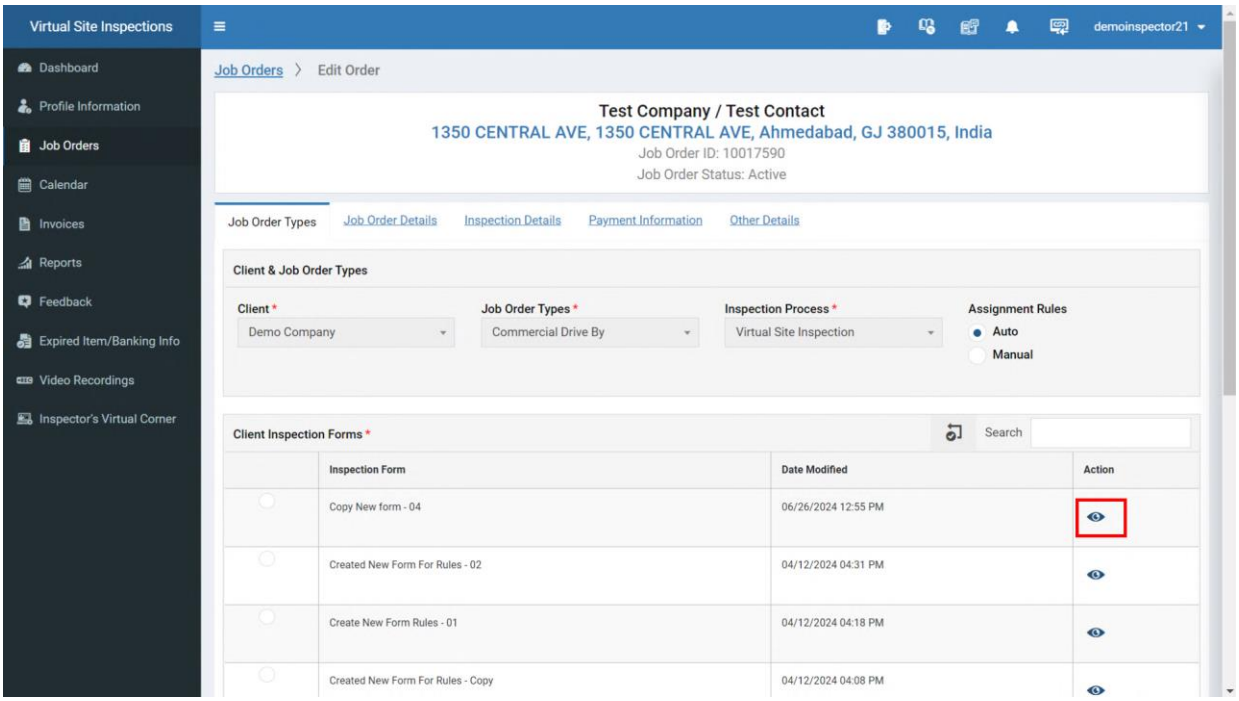
In the 'Client Inspection Form' section, you will find all the inspection forms mapped with the selected job order and client. In the first column, there are markers indicating the selected inspection forms. Following that, the second column displays the names of the inspection forms. Afterward, you will find the date of the latest modification for each inspection form. Action buttons are also provided, allowing you to view each inspection form.

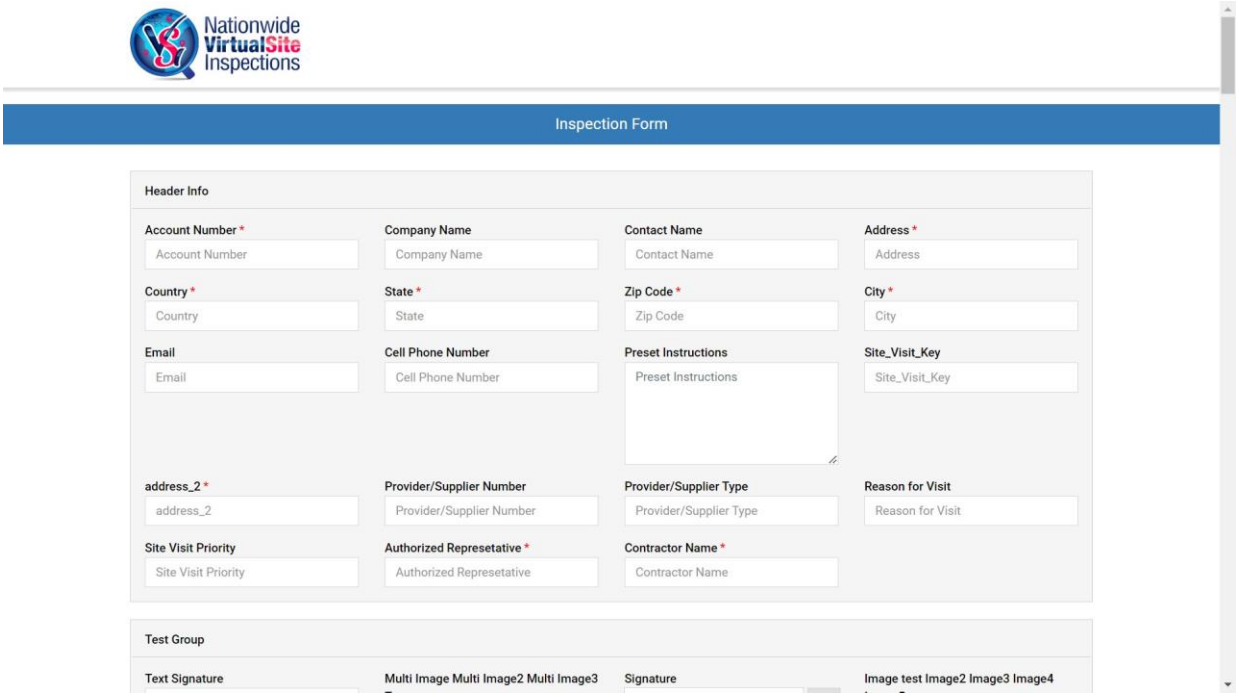


To search for an inspection form using a keyword, the system performs the search in the 'Name' field. Enter your search term in the highlighted search field, as illustrated in the provided screenshots, and press enter or click on the finder icon next to the text field. The system will then search for matching words within the inspection form names and display the relevant inspection form records.



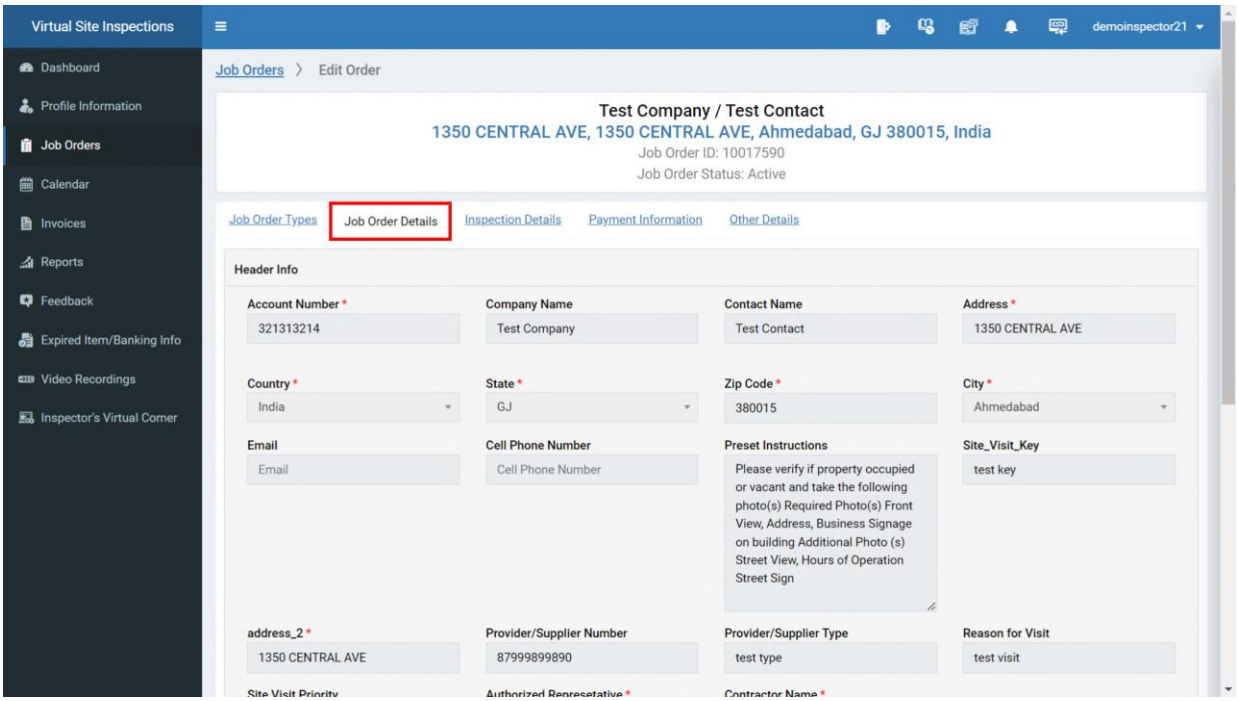
To view an inspection form, click on the 'View' button in the inspection form list. This will open a new tab where you can preview the form, including all groups, image section, and document section.





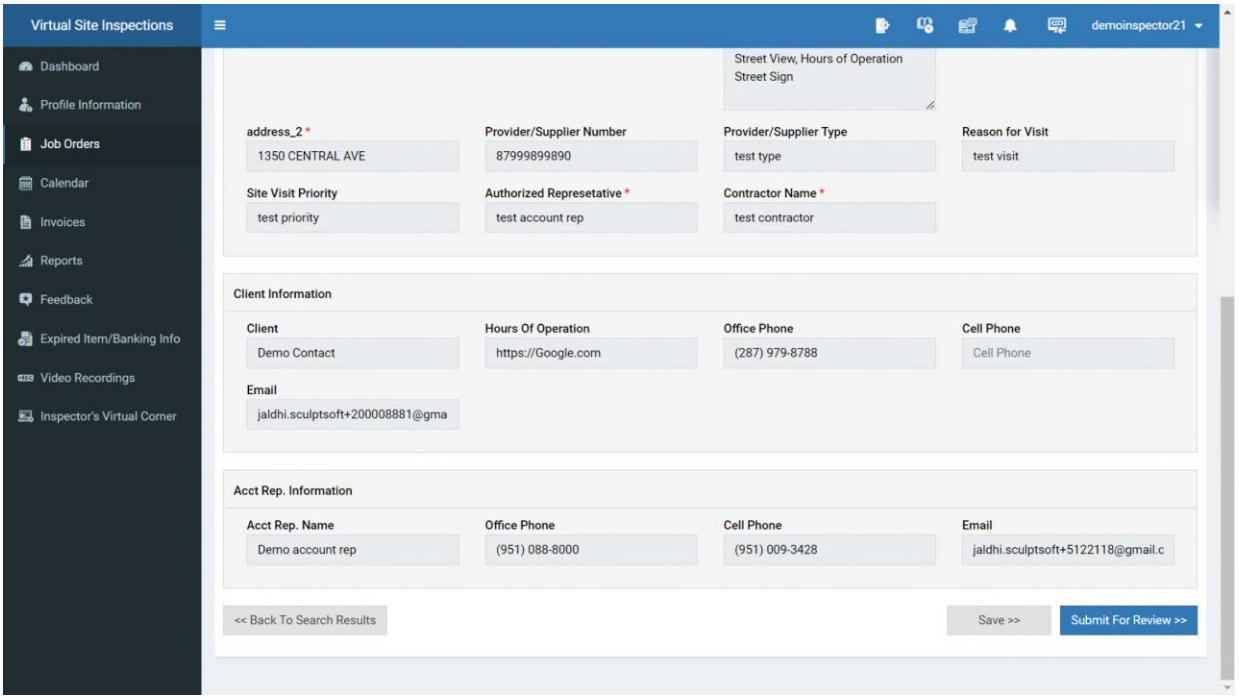
In the 'Job Order Details' section, you will find three subsections: Header Info, Client Information, and Acct Rep. Information.

In the 'Header Info' section, you will find job order-related fields such as account number, company name, contact name, address of the property, and additional fields that have been added to the inspection form.



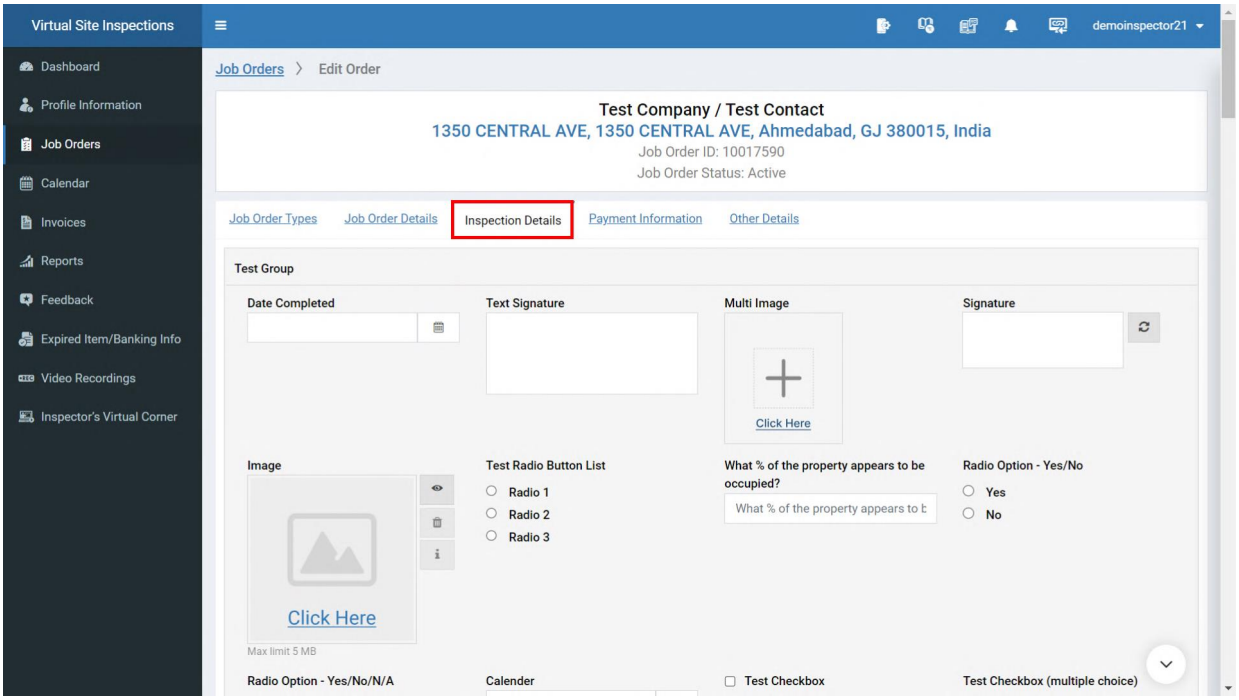
In the 'Client Information' section, you will find details related to the client. This includes the client's name, hours of operation, as well as the client's contact cell phone number and email.

After that, in the 'Acct Rep. Information' section, you will see details related to the account representative. This includes the account rep. name, office phone number, cell phone number, and email address of the account representative.



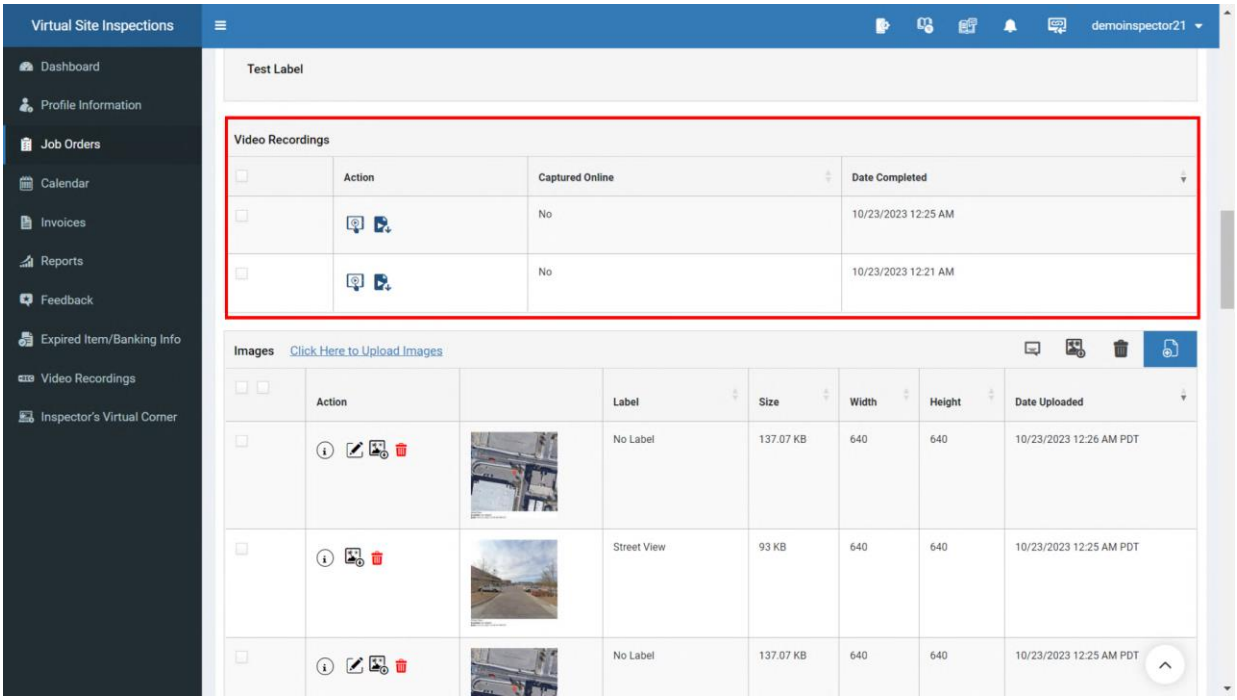
In the 'Inspection Details' section, you will find a list of inspection form groups, followed by the Images and Documents sections.

In the 'Inspection Details' section, you will find a comprehensive list of inspection form groups. Within each group, you will see the questions related to the job order. Here, you can review and update the existing field question's answers.

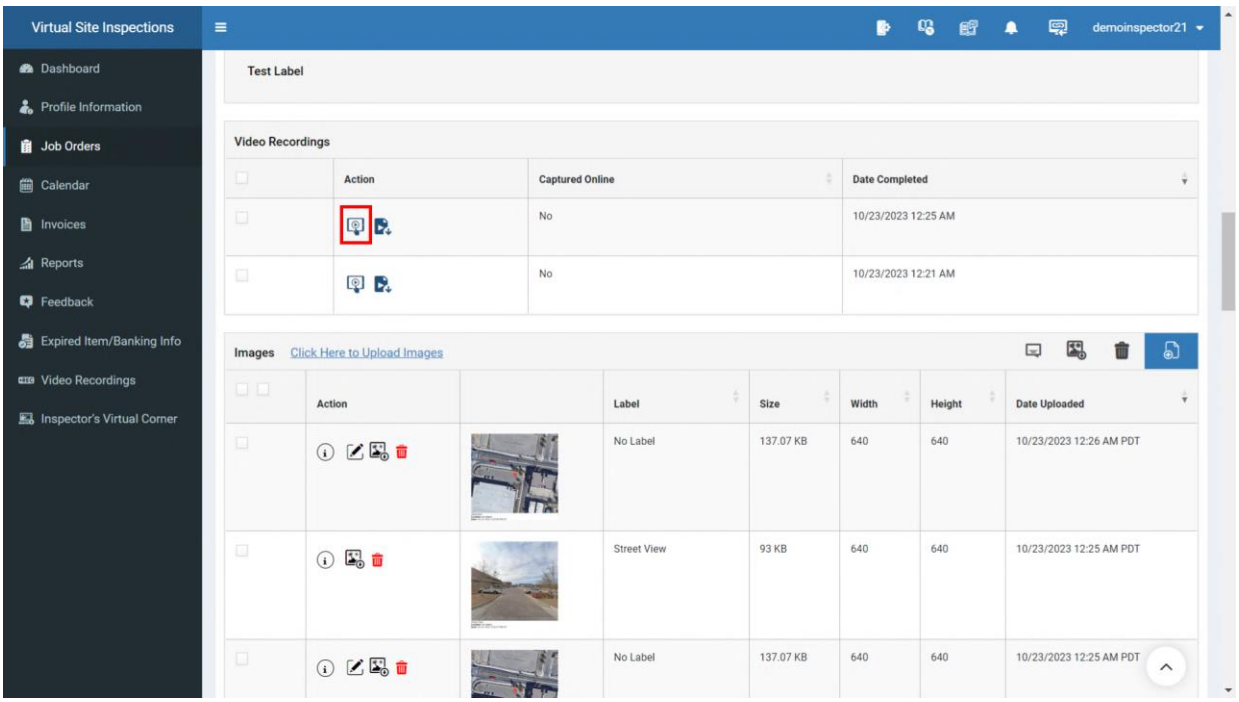


Video Recording

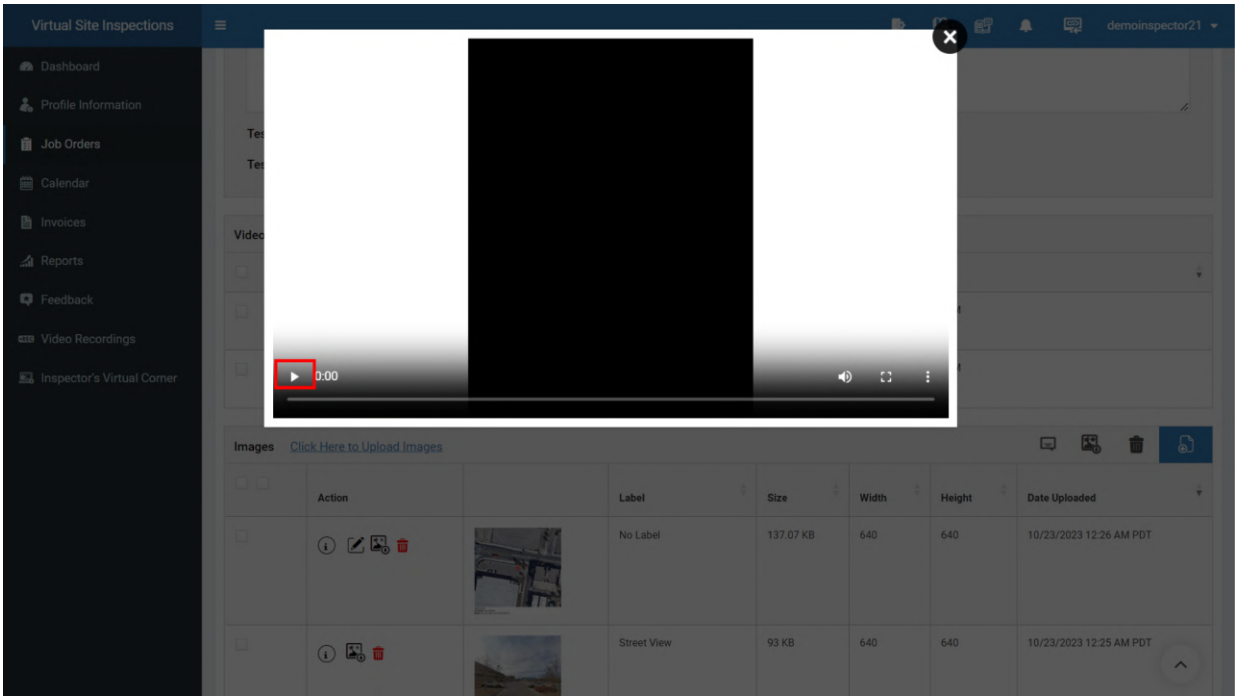
Inspector can view a list of recorded videos in job order and also has the capability to play or download any video from the list.



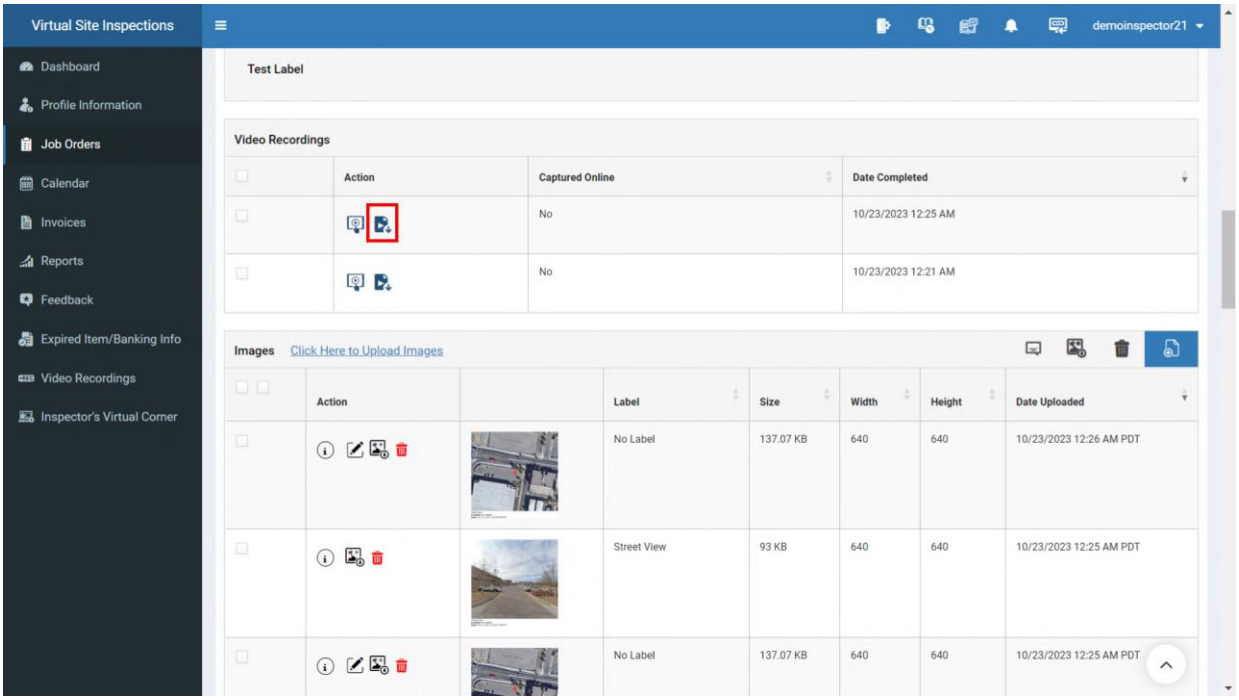
Recorded video can play by clicking on the Play icon from the grid.



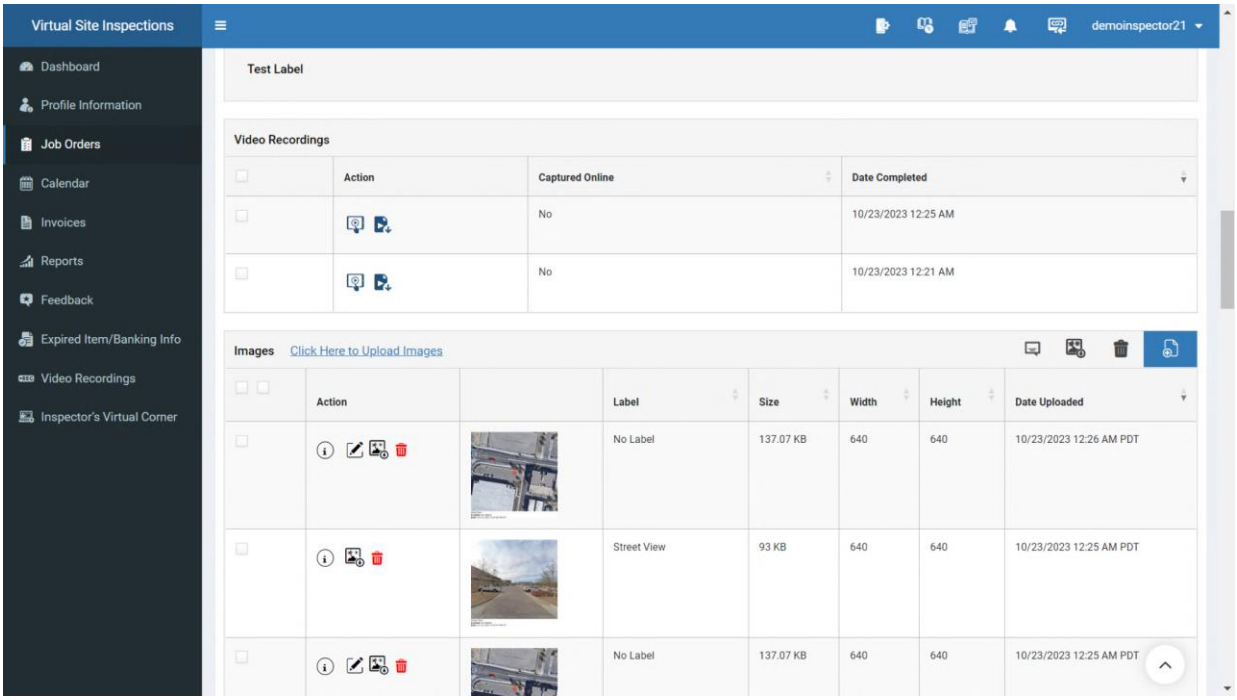
After clicking on the "Play" icon from the grid, a video popup will appear, enabling the inspector to play the recorded video by clicking the play icon within the popup.



Inspector can download a video from the recording list by clicking on the "Download" icon, as highlighted in the screenshot below.

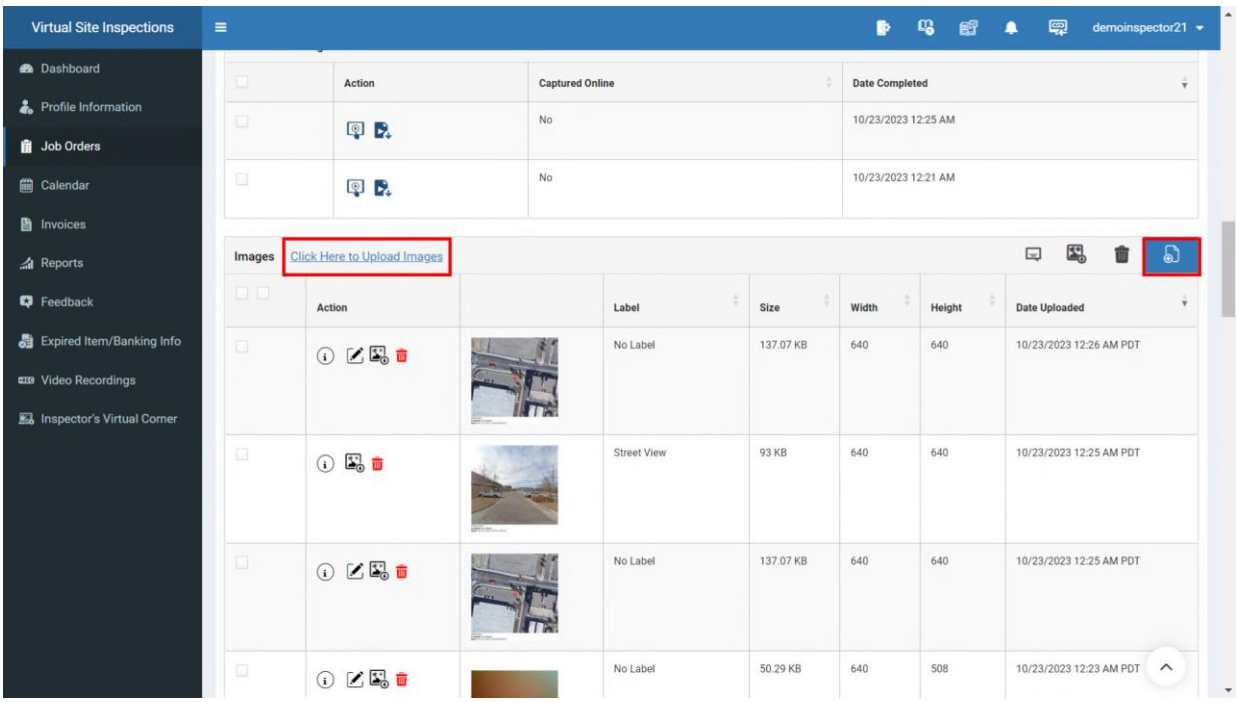


In the image section, you will find all the uploaded and predefined images that are mapped in the inspection form, along with their respective labels, sizes, widths, heights, and the date of upload.



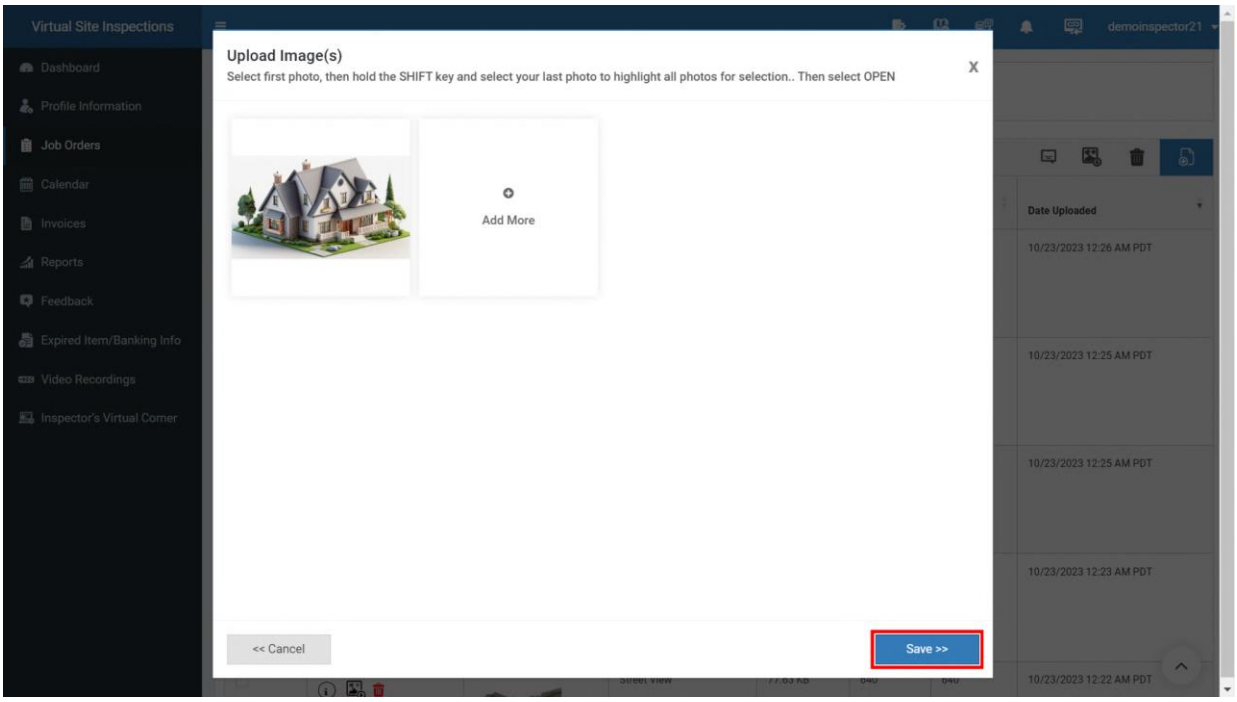
In the 'Image' section, you will find various options at the top of the image bar, including 'Add Label', 'Download Selected Images', 'Delete Selected Images' and 'Add New'.

On clicking the 'Add New' or 'Click Here to Upload Images' button, a system dialog will open, allowing you to choose your file for upload.

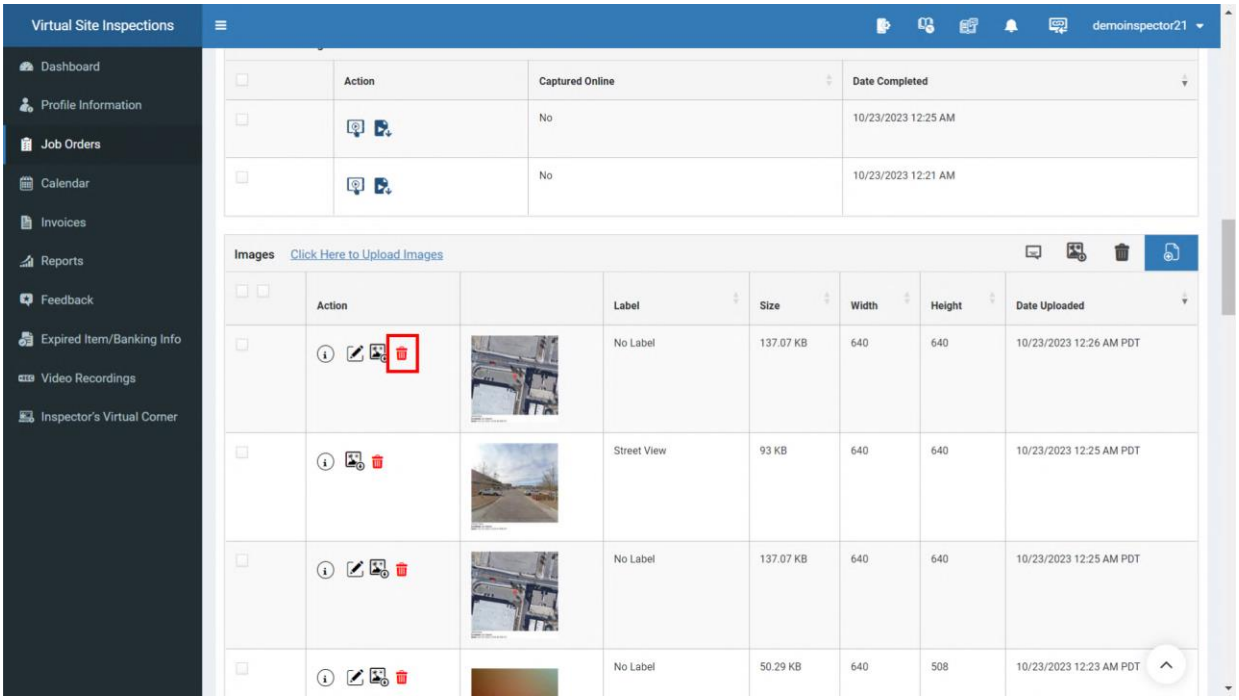


In the dialog, select the image and click the 'Open' button in the system file selection dialog. This action will close the current dialog, and subsequently, another dialog will appear, showcasing the selected files. Below, you will find the 'Save' button. Clicking on the 'Save' button will temporarily store

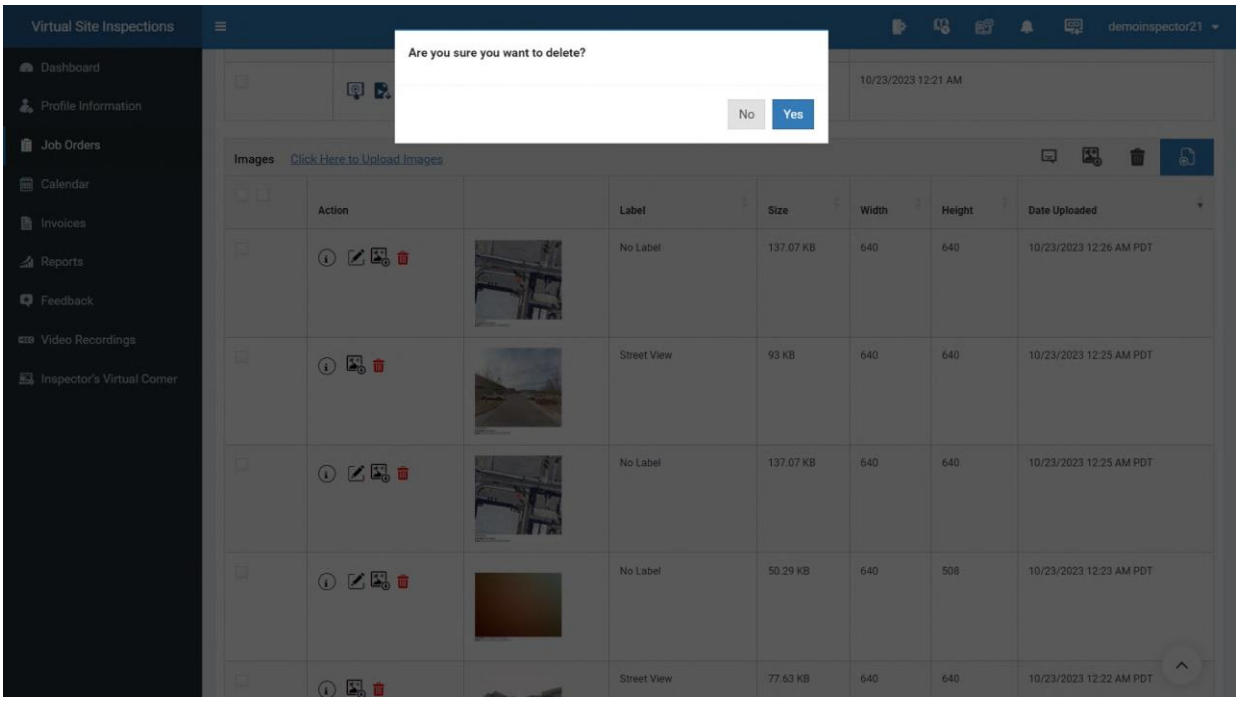
the images. To ensure permanent storage along with the job order, it is necessary to click on the 'Save' button located at the bottom of the form.



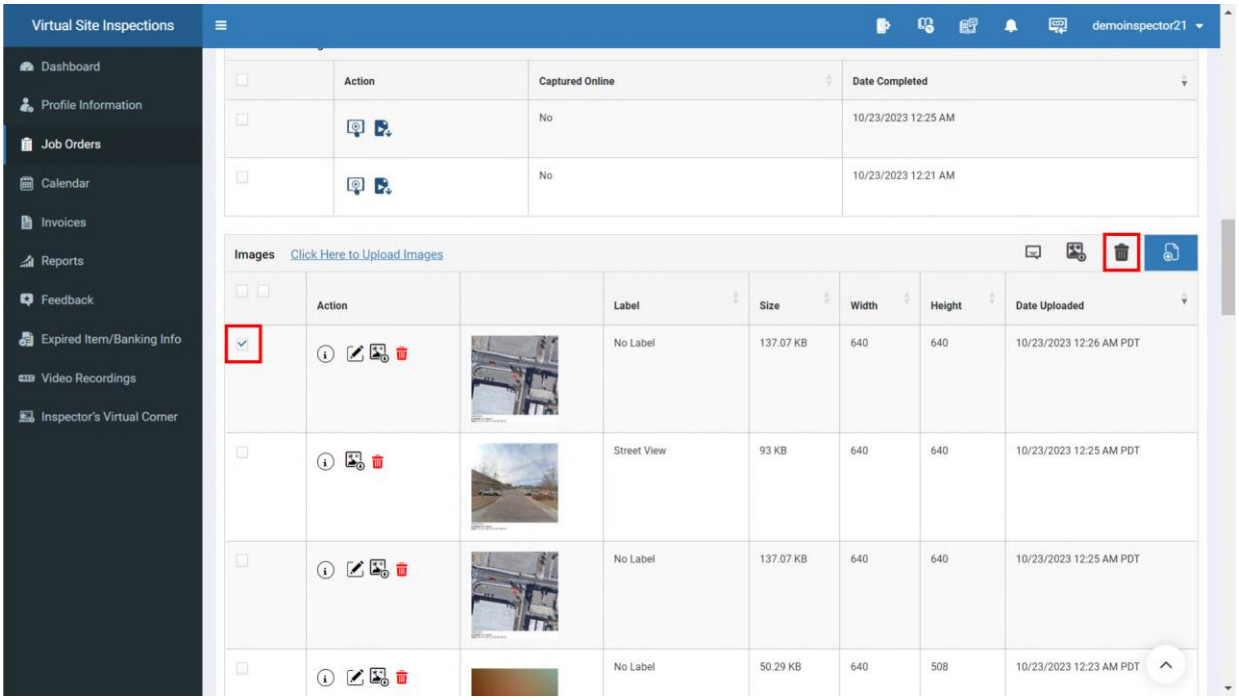
In the list, the initial column features a delete button. This button allows users to remove or delete the corresponding entry from the list.



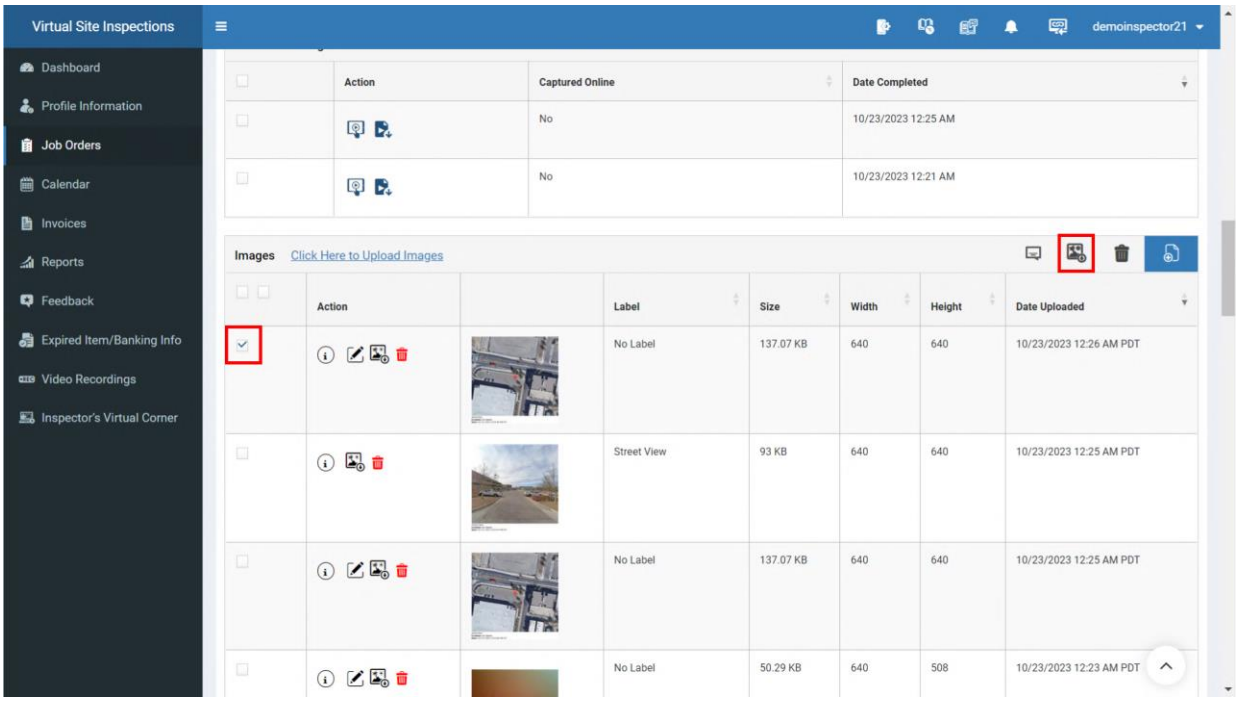
Upon clicking the 'Delete' button, a dialog box will emerge, featuring an alert with the query, 'Are you sure you want to delete ?' Within the dialog, two buttons are available. The first button, labeled 'Yes' confirms the deletion, subsequently removing the image from the list. The second button, 'No' closes the dialog without performing any action.



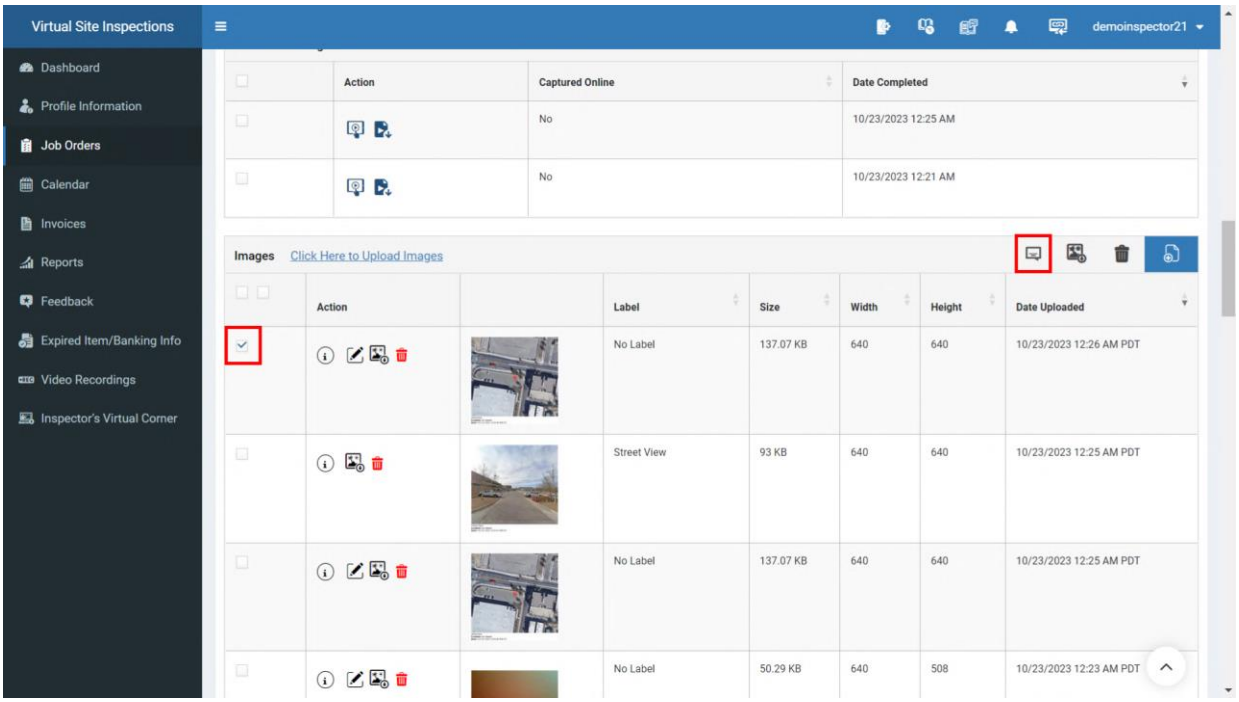
We can delete multiple images by selecting them using checkboxes and clicking on the delete button in the top of the image sections, as shown.



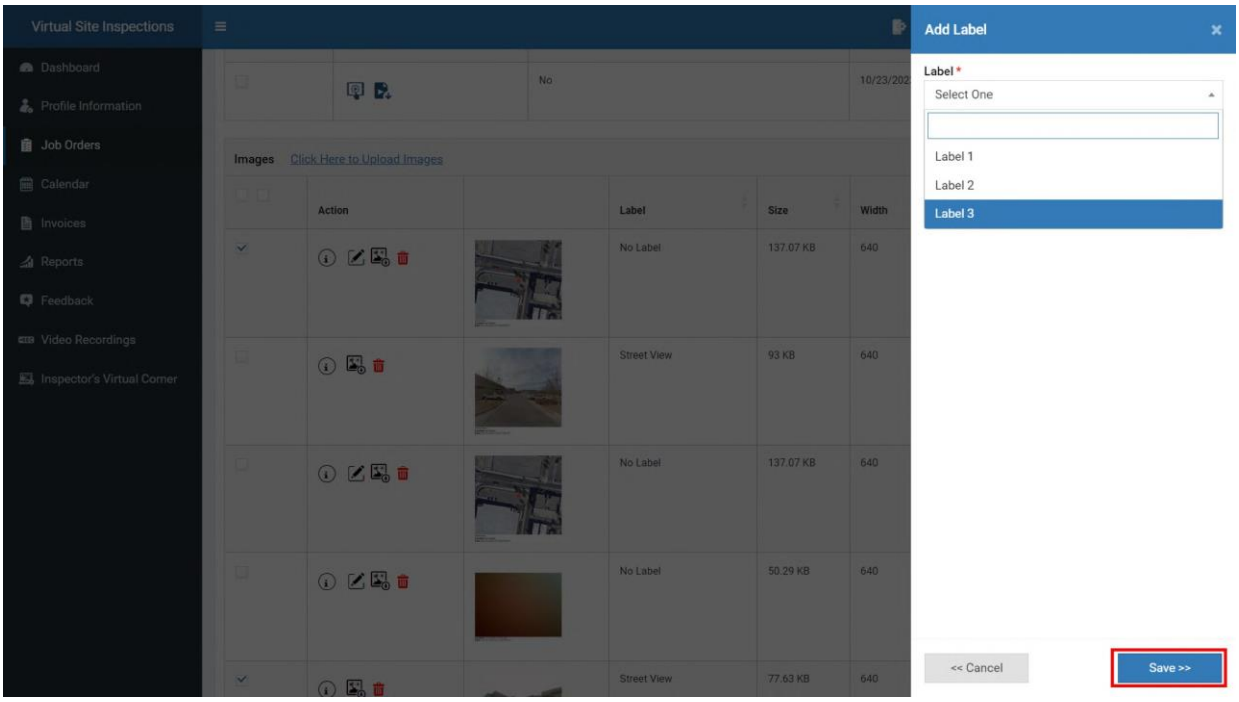
On clicking the 'Download Selected Images' a zip file containing the selected images, marked with checkboxes on the left of each image, will be downloaded.



When selecting an image for label updating, clicking the 'Add Label' button will open a side modal on the sidebar.



There, you can choose labels from the dropdown list, and the selected label will be assigned to the chosen image.

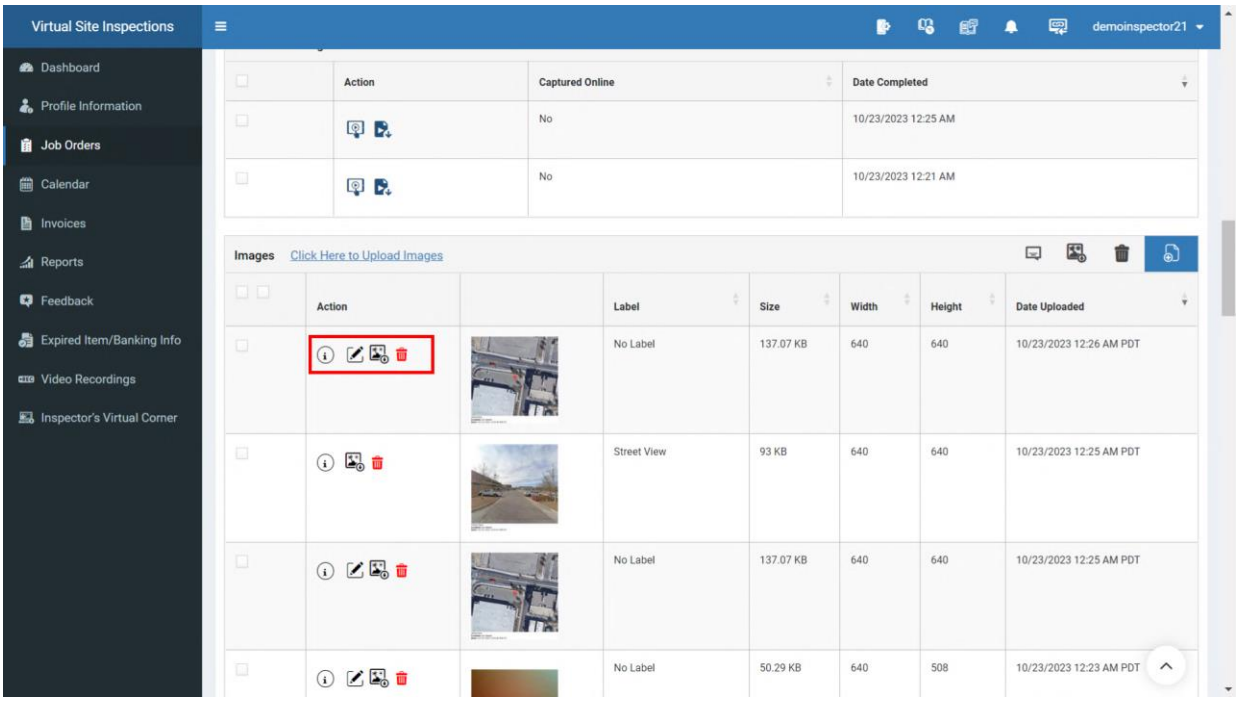


In the image list, the Action column contains multiple icons, including information, download image, and delete button.

On clicking the 'Edit' icon, a edit image popup will appear

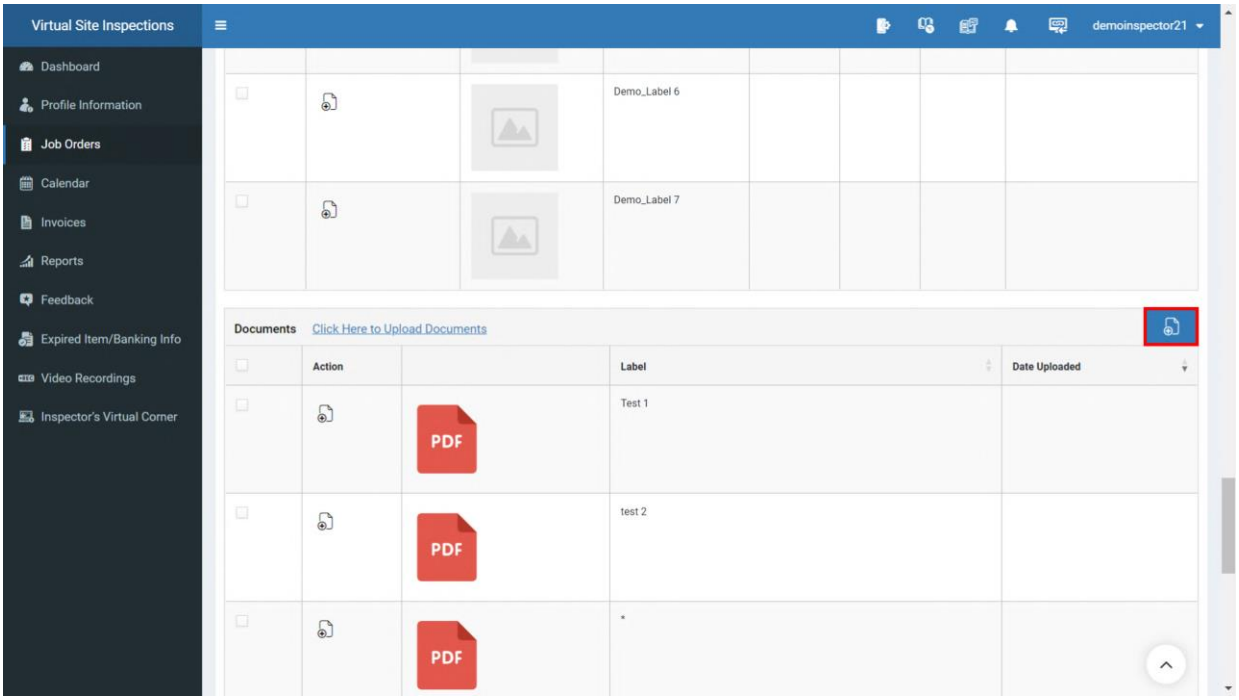
On clicking the 'Information' icon, a popup will open, providing details about the image.

On clicking the 'Download Image' icon, the selected image will be downloaded to your device.

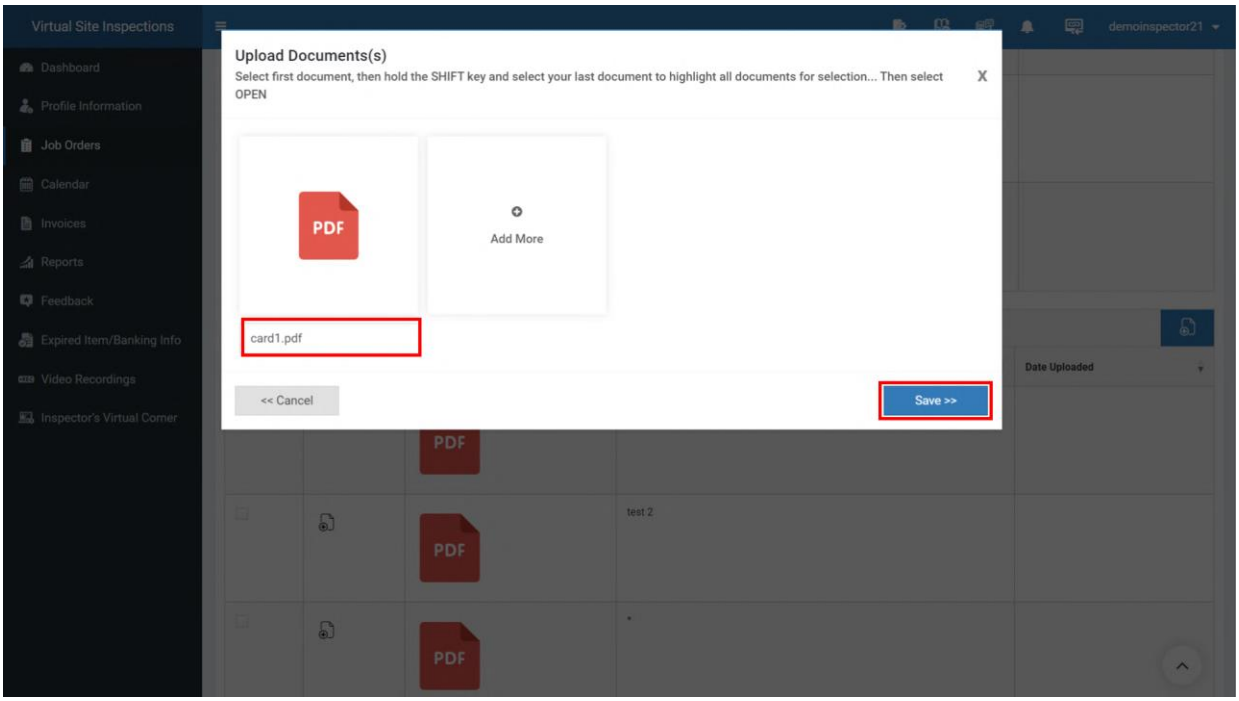


In the Document section, you will find all the uploaded and predefined documents that are mapped in the inspection form, along with their respective label, Date Uploaded.

On clicking the 'Add New' or 'Click Here to Upload Documents' button, a system dialog will open, allowing you to choose your file for upload.



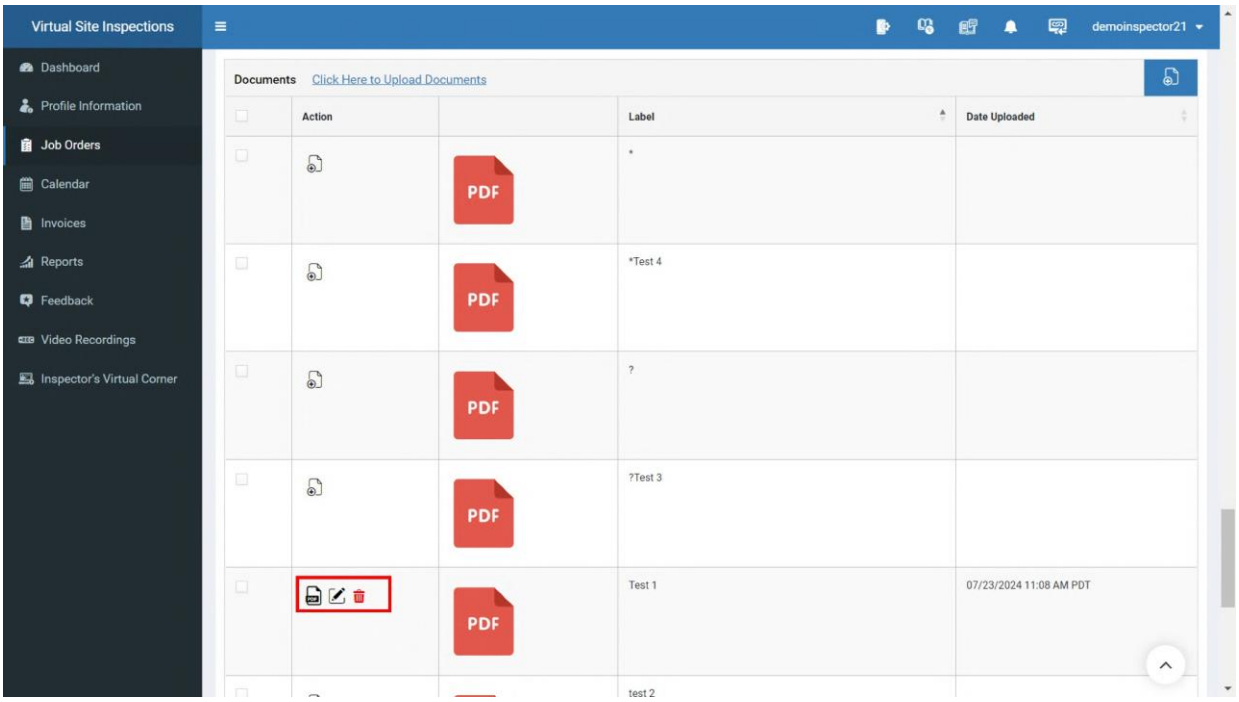
In the dialog, choose the document and click the 'Open' button in the system file selection dialog. This will close the current dialog, and subsequently, another dialog will appear, displaying the selected files. Below, you will encounter the 'Save' button. Clicking on the 'Save' button will temporarily store the documents. For permanent storage along with the job order, it is essential to click on the 'Save' button located at the bottom of the form.



In the document list, the Action column contains multiple icons, including information, download document, and delete button and edit document.

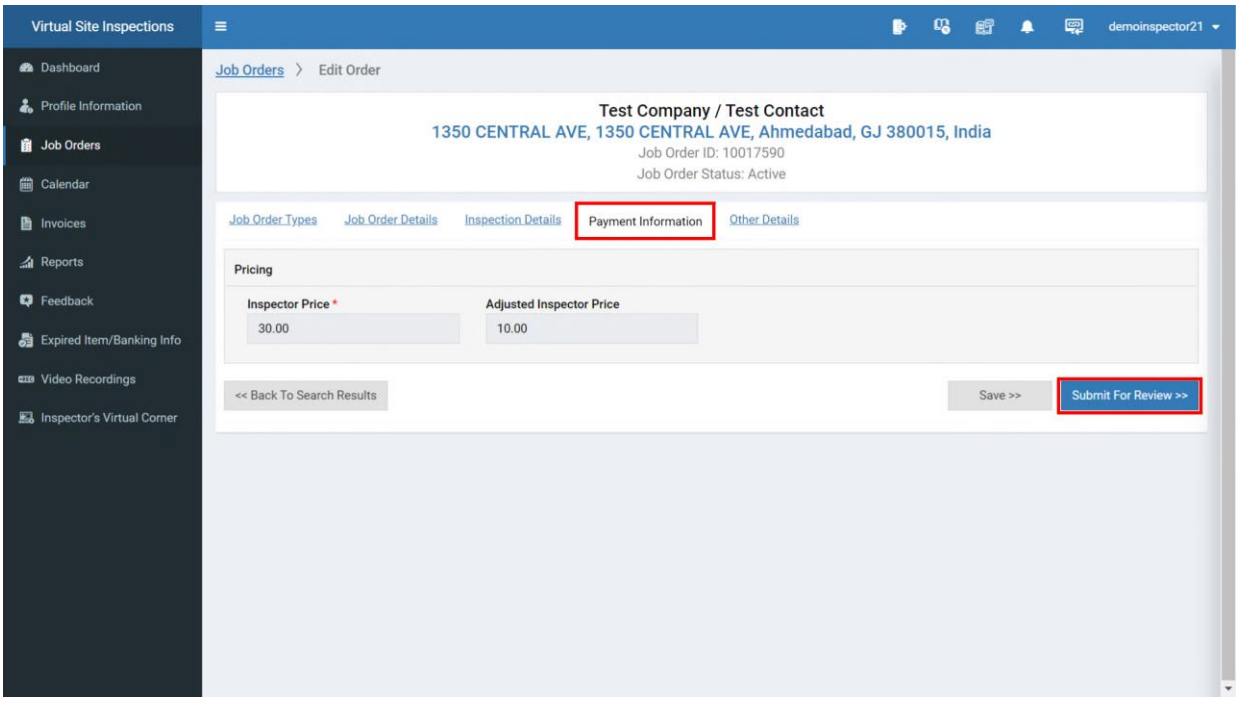
When you click the 'Edit' icon, an edit document popup will appear, allowing you to modify both the document and its name.

When you click the 'Delete document' icon, the document will be temporarily removed from the document list.To save those changes permanently click on the ‘Save’ button located at the bottom of the form.



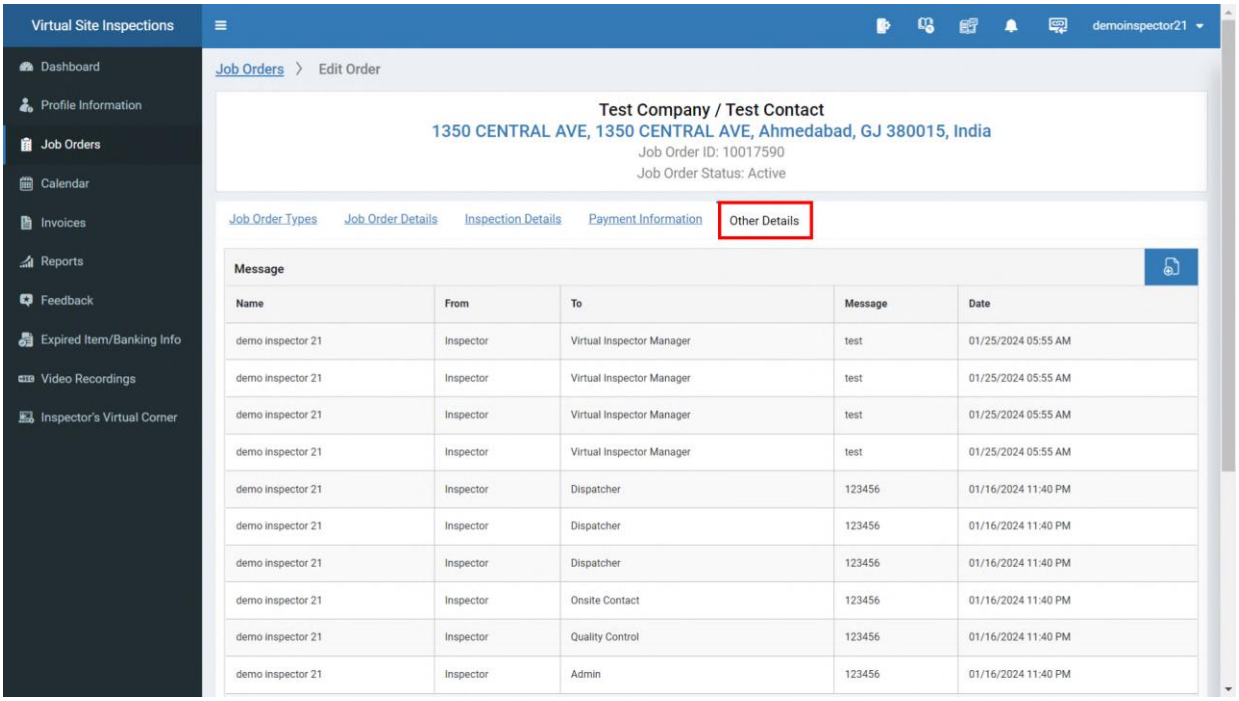
The Payment Information section provides details related to the financial aspects of a transaction.

The Payment Information tab features a Pricing section that includes two key components: the Inspector Price and the Adjusted Inspector Price. The Inspector Price represents the initially quoted cost for the inspection service, while the Adjusted Inspector Price reflects any modifications or adjustments made to the original pricing. This section provides a clear breakdown of the financial details associated with the inspection, ensuring transparency and accuracy in the payment process.

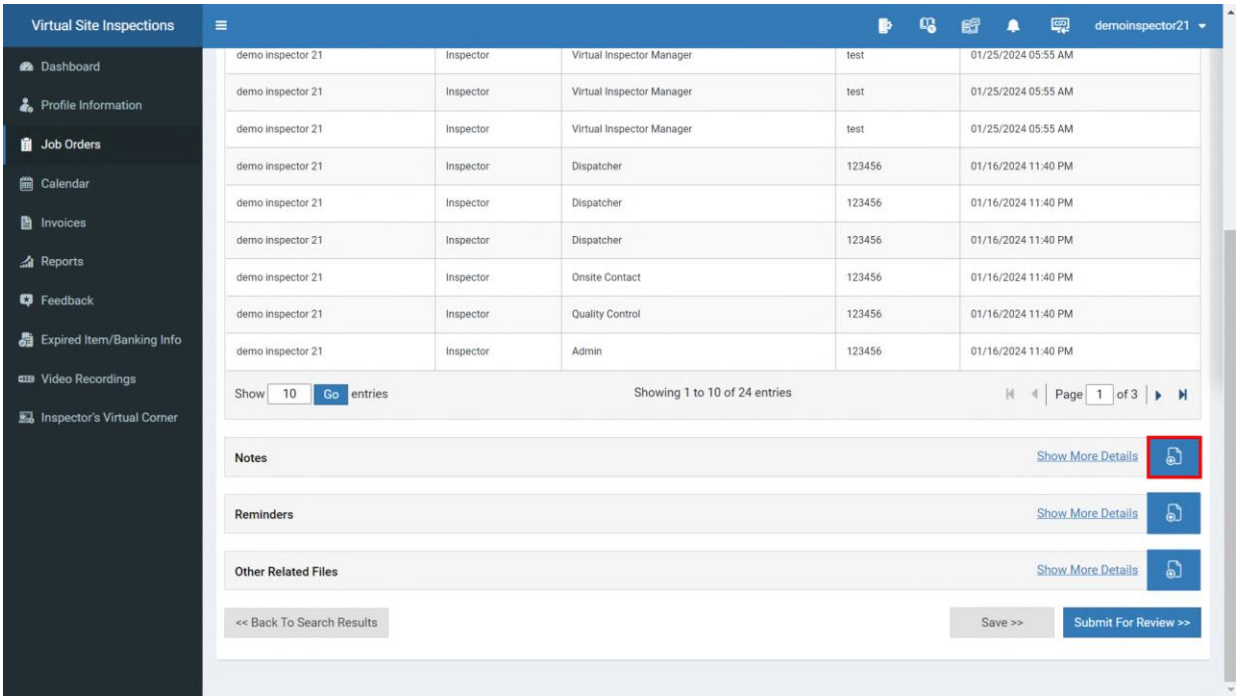


The "Other Details" tab encompasses several essential sections, including a Message section for facilitating communication, a Notes section for recording important details, a Reminder section for setting and managing task-specific deadlines, and Other Related Files section for attaching and accessing supplementary documents or materials. This comprehensive arrangement ensures effective organization, communication, and documentation within the context of the task or project.

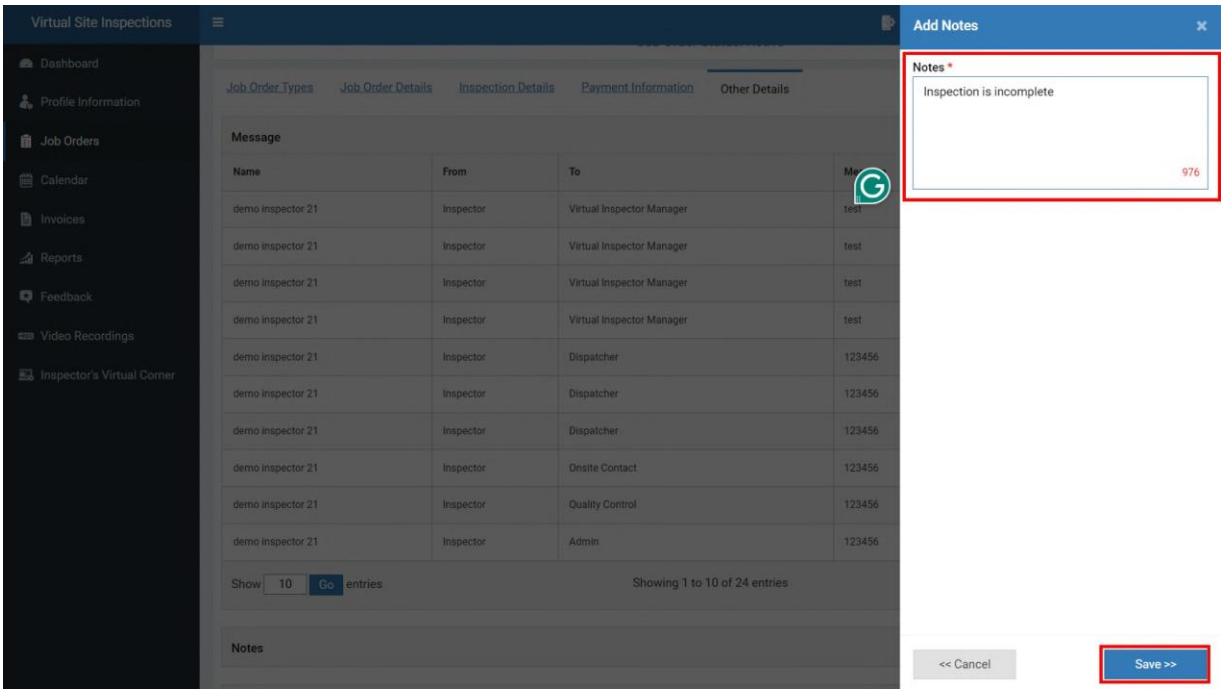
The Message section gathers messages with sender and recipient details, content, and date. Inspectors employ this module for sending task-related messages, ensuring transparent communication regarding job order details. The process for sending messages follows the steps explained on the subsequent page.



The Notes section is utilized to add relevant notes for this specific job order. Inspectors can add notes by clicking on the "Add New" icon, allowing them to include additional information or observations related to the job order.

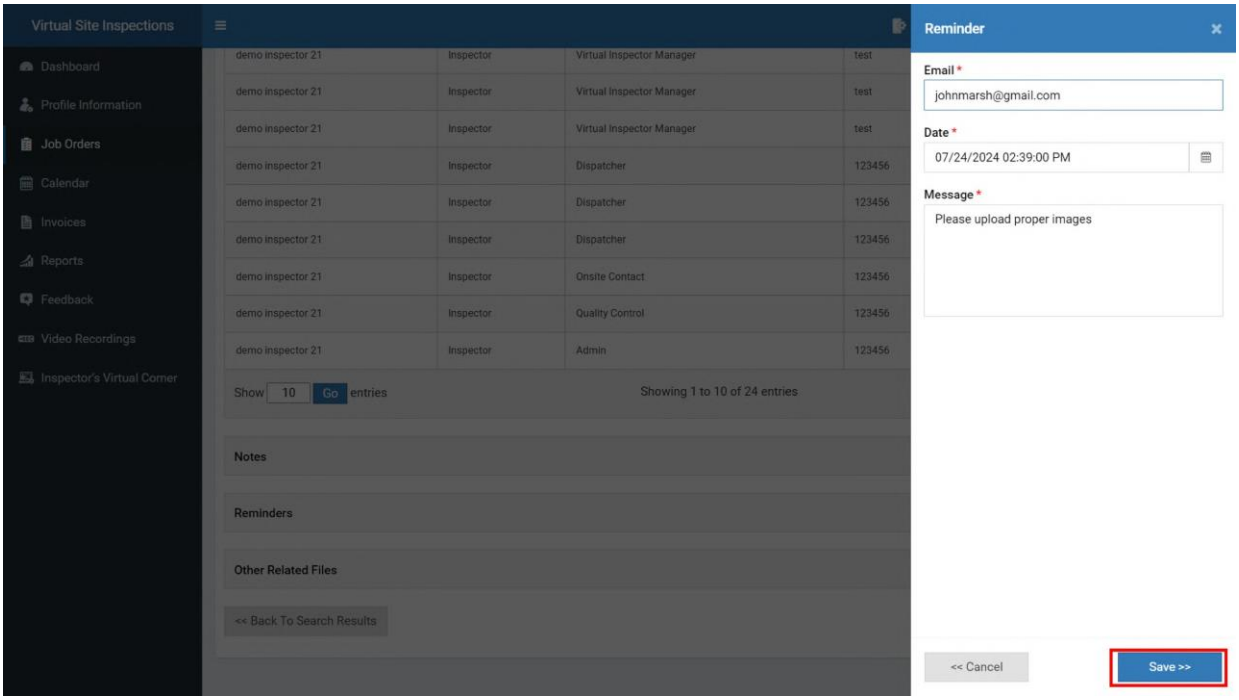


Upon clicking the "Add New" icon, a side modal window appears. Within this modal, inspectors can input notes into a text area. After entering the notes, clicking the "Save" button will close the side modal, and the newly added notes will be included in the notes list for the job order.



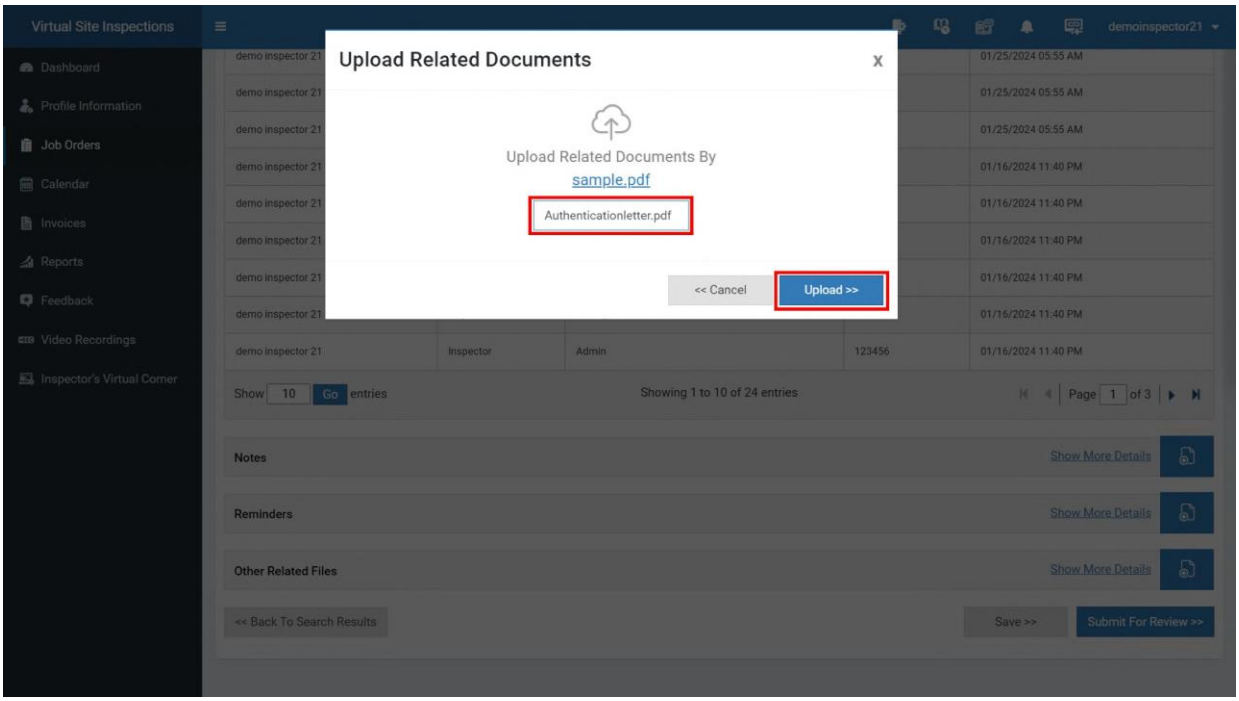
Inspectors can edit notes by clicking on the edit icon, providing them with the ability to make necessary modifications to the content of the notes.

The Reminder feature is employed to set reminders. Clicking on the "Add New" icon opens a side modal where users can input details such as email, date, and message. After completing all the required information, clicking the "Save" button adds the reminder to the list. Additionally, an email notification is sent at the specified date and time to serve as a reminder for the user.

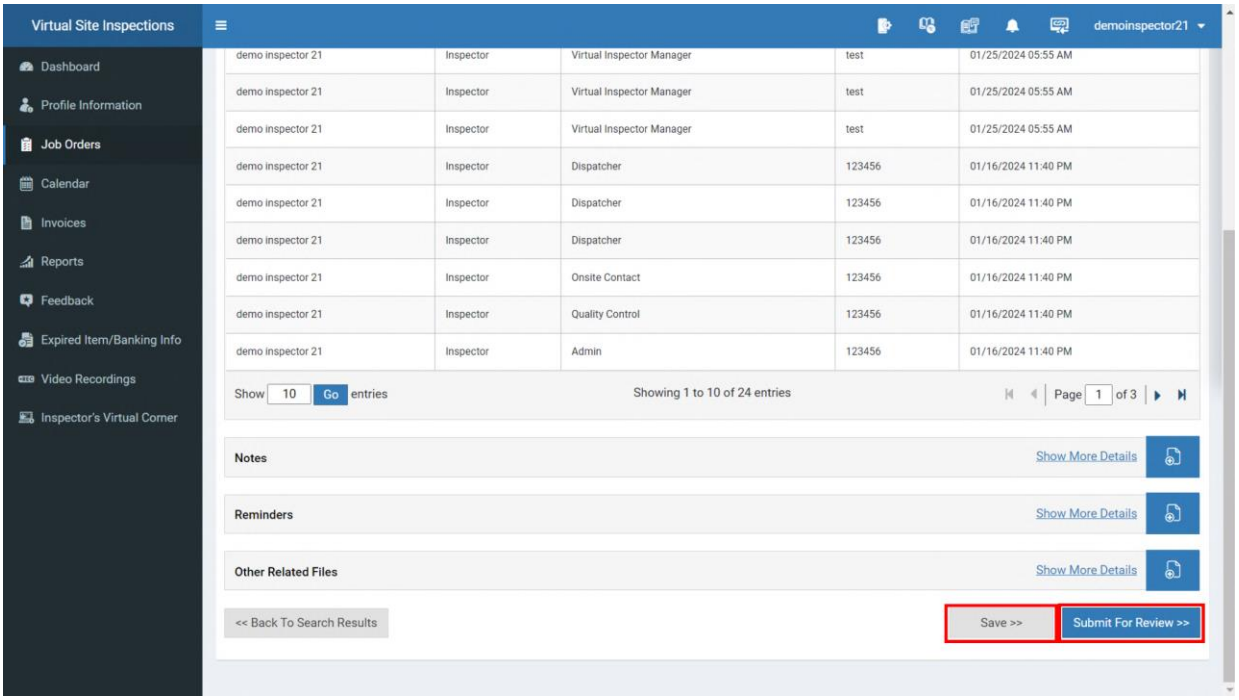


Inspectors have the option to both edit and delete reminders within the reminder list. This functionality allows them to make changes to existing reminders or remove ones that are no longer needed.

In the "Other Related Files" section, inspectors can upload additional documents by clicking on the add icon. After uploading a document, inspectors have the flexibility to view and delete it if necessary. This feature enhances organizational efficiency, allowing inspectors to manage supplementary files associated with the task or project.

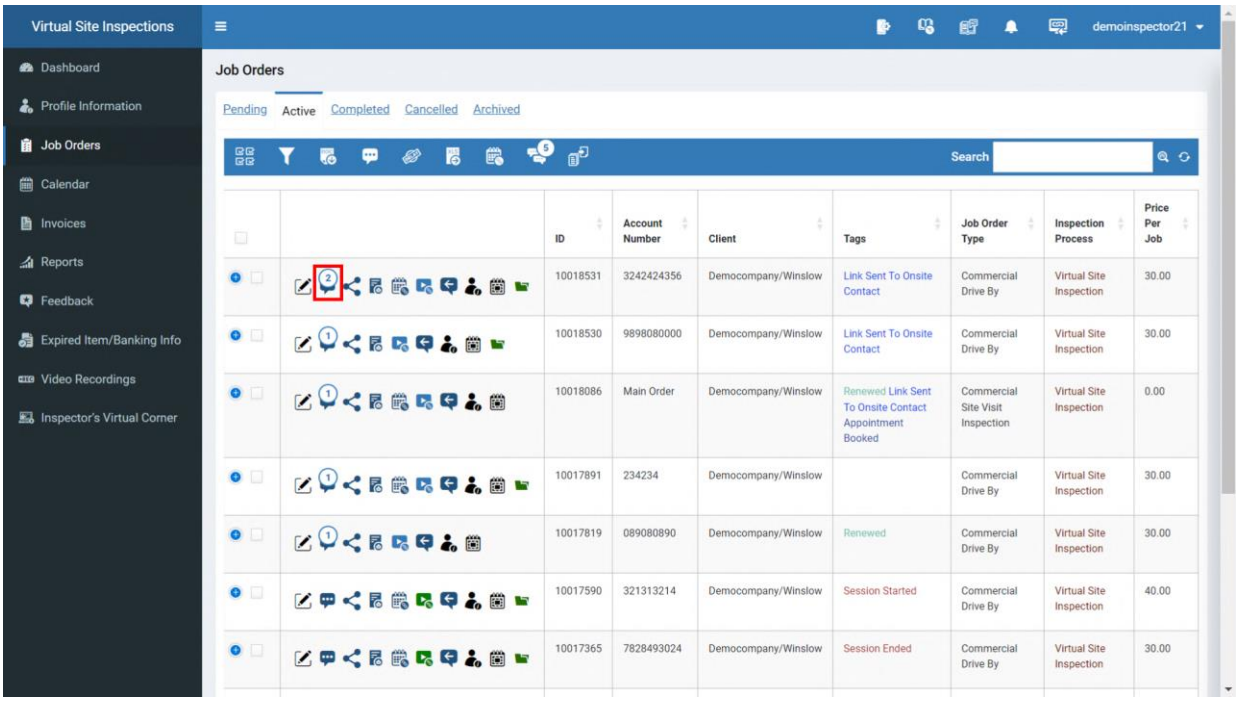


Within the job order editing interface, two buttons are present: "Save", and "Submit for Review." If the inspector "Click on the "Save" button will preserve any changes made, while selecting the "Submit for Review" button will initiate the submission of the order for administrative review.



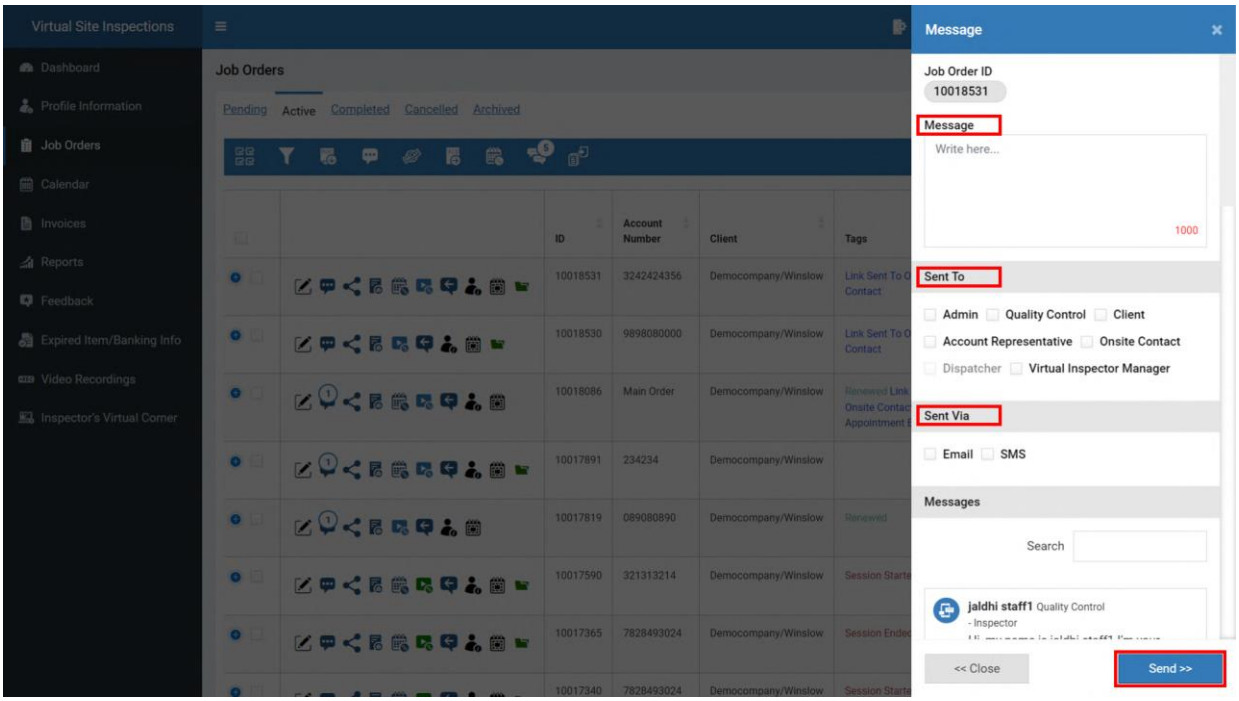
Message

The "Message" functionality allows users to send messages to various recipients such as Client, Quality Control, Account Representative, Admin. To send a message or View received messages, you need to click on the message icon from a specific job order item, as illustrated in the provided screenshot below.



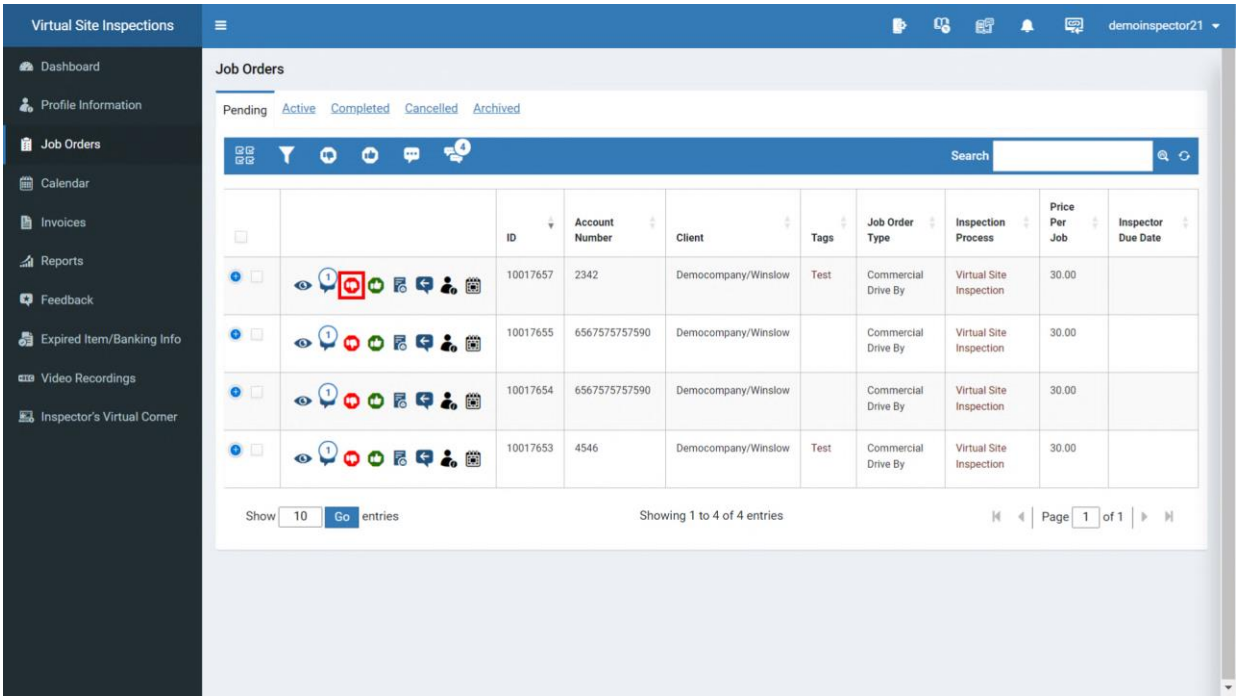
After clicking on the message icon, a pop-up will appear, prompting you to input the message content. In this pop-up, You can select the Text Message option in the “Select Message Type” Field, then add your message and select the recipients from the "Sent To" section. Additionally, you can choose the channel through which the message will be sent by selecting the appropriate option in the "Sent Via" section, as illustrated in the provided screenshot and then hit on the ‘Send >>’ button to send the message.

Inspector can see the message history in the message panel at the bottom.



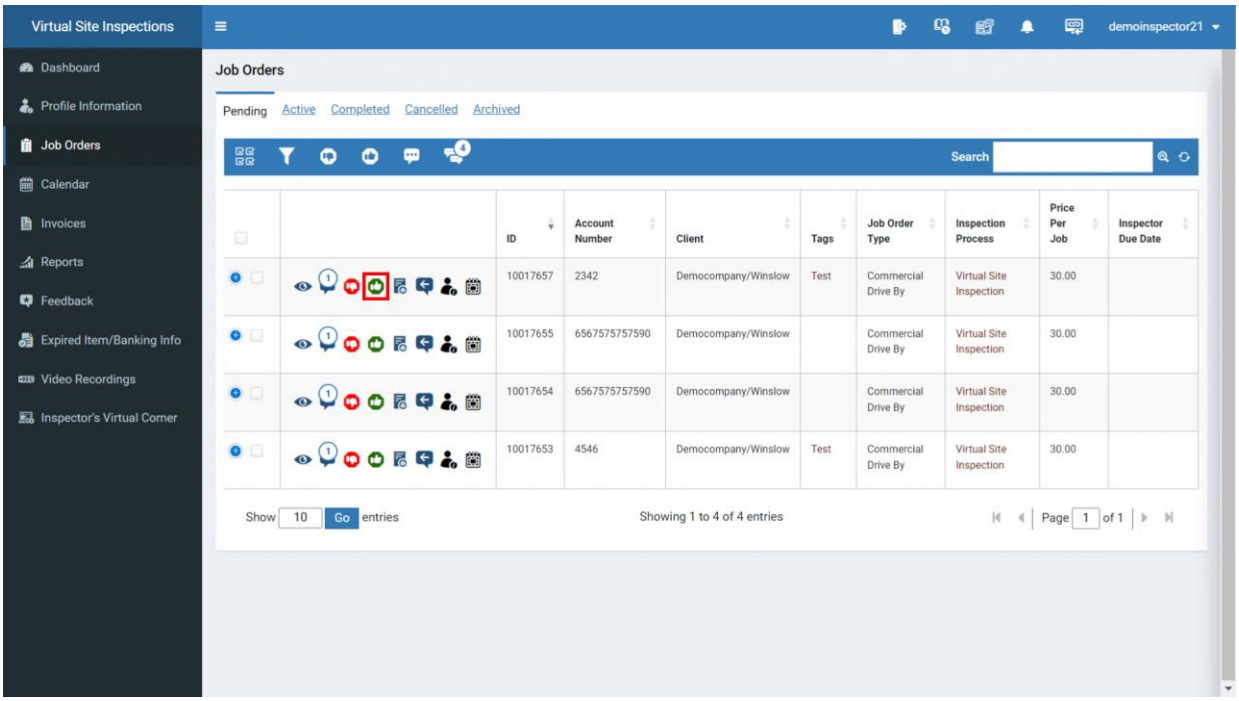
Decline Order

Inspectors can choose not to take on a job by using the decline functionality. This feature is specifically designed for rejecting a single job order, and the steps involved in the process remain the same as when declining multiple job orders. Decline orders will be removed from the pending list and assigned to a different inspector.



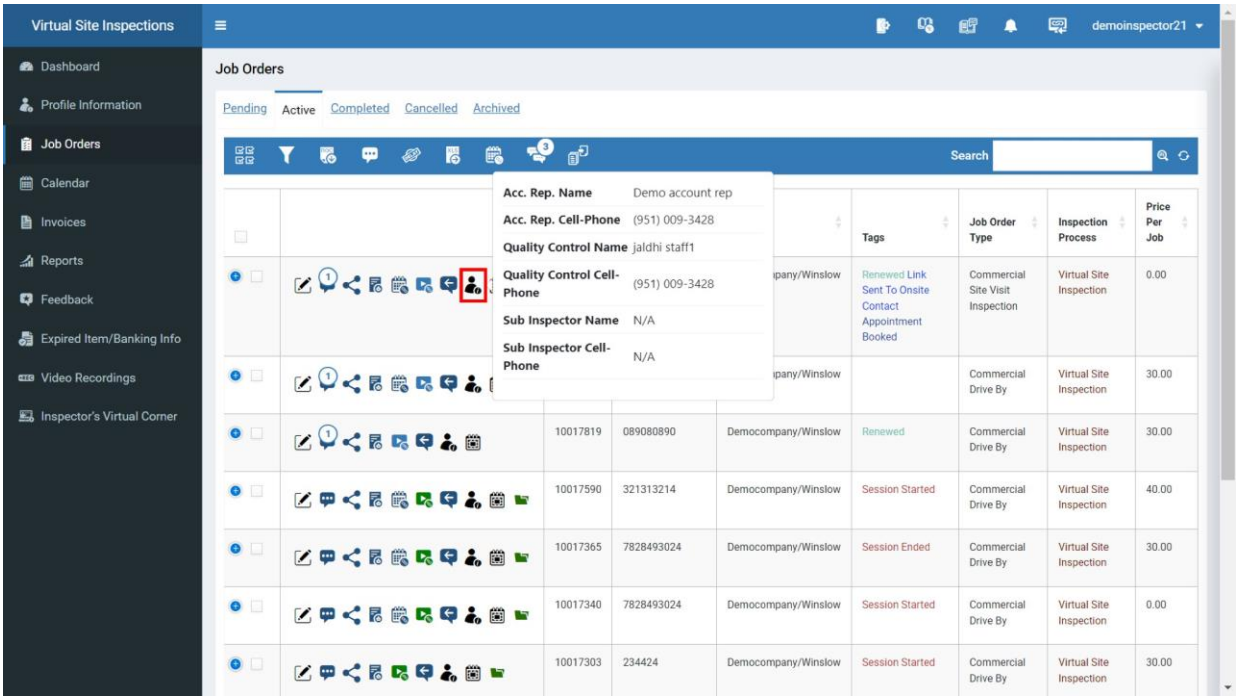
Accept Order

Inspectors have the option to accept a job by using the accept functionality. This feature is specifically designed for accepting a single job order, and the steps involved in the process remain the same as when accepting multiple job orders. By Accepting you confirm that the job order inspection will be conducted by you.



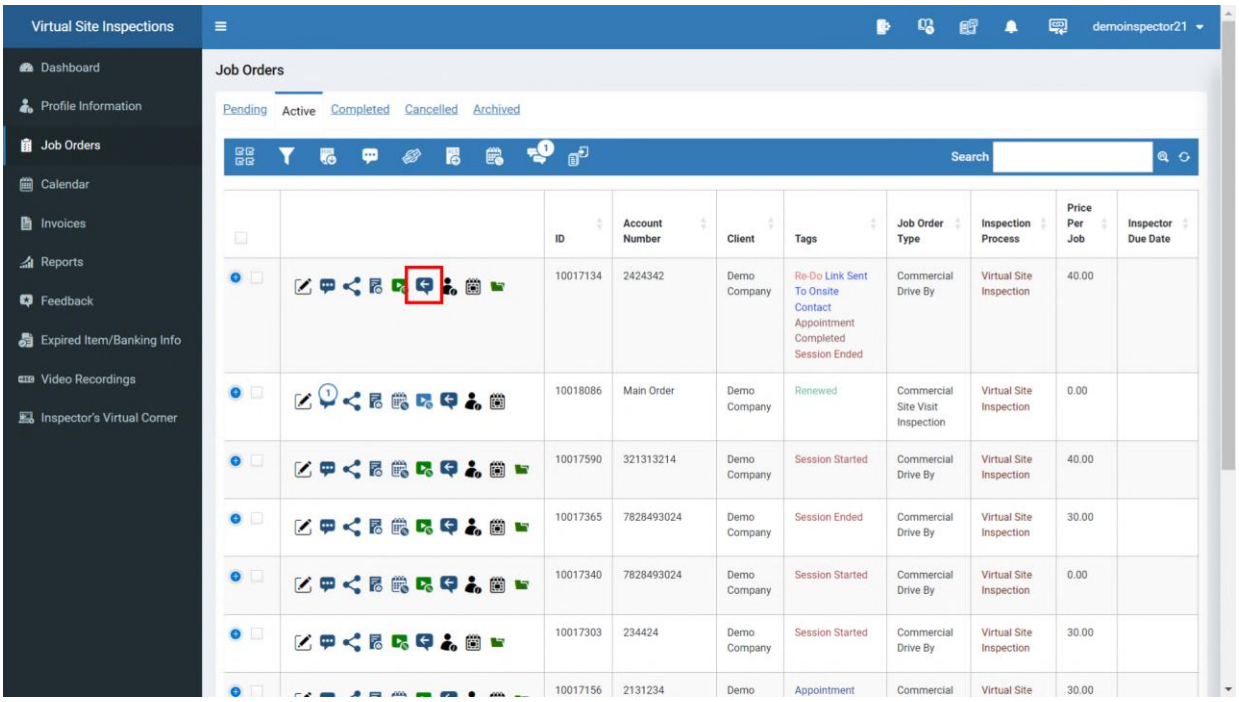
User Information

This feature provides user details associated with specific job orders, including roles such as Quality Control and Account Representative.

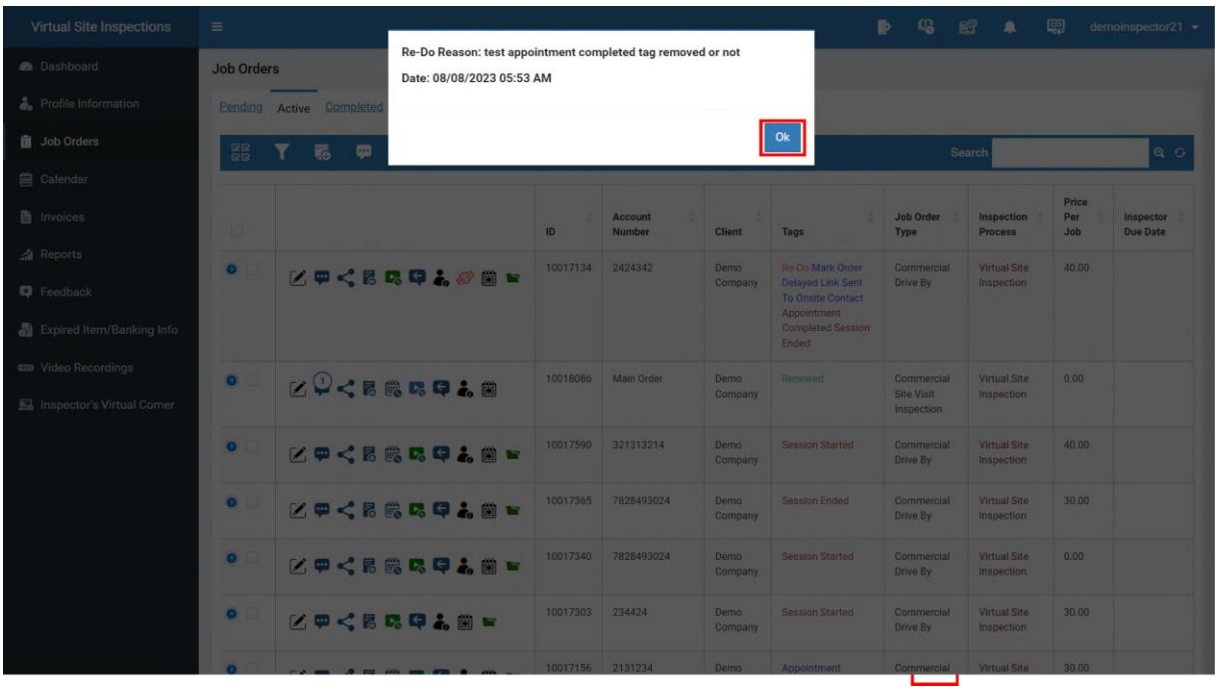


Send Back Reason

This feature shows the reason for sending back or redoing a specific job order, as illustrated in the provided screenshot. The "Send Back/Redo Reason" feature enhances transparency and communication by providing clear reasons for why a particular job order has been sent back or marked for redo. It promotes collaboration between the Client, Quality Control Team, Admin, Dispatcher facilitating a clear understanding of the required modifications or improvements.

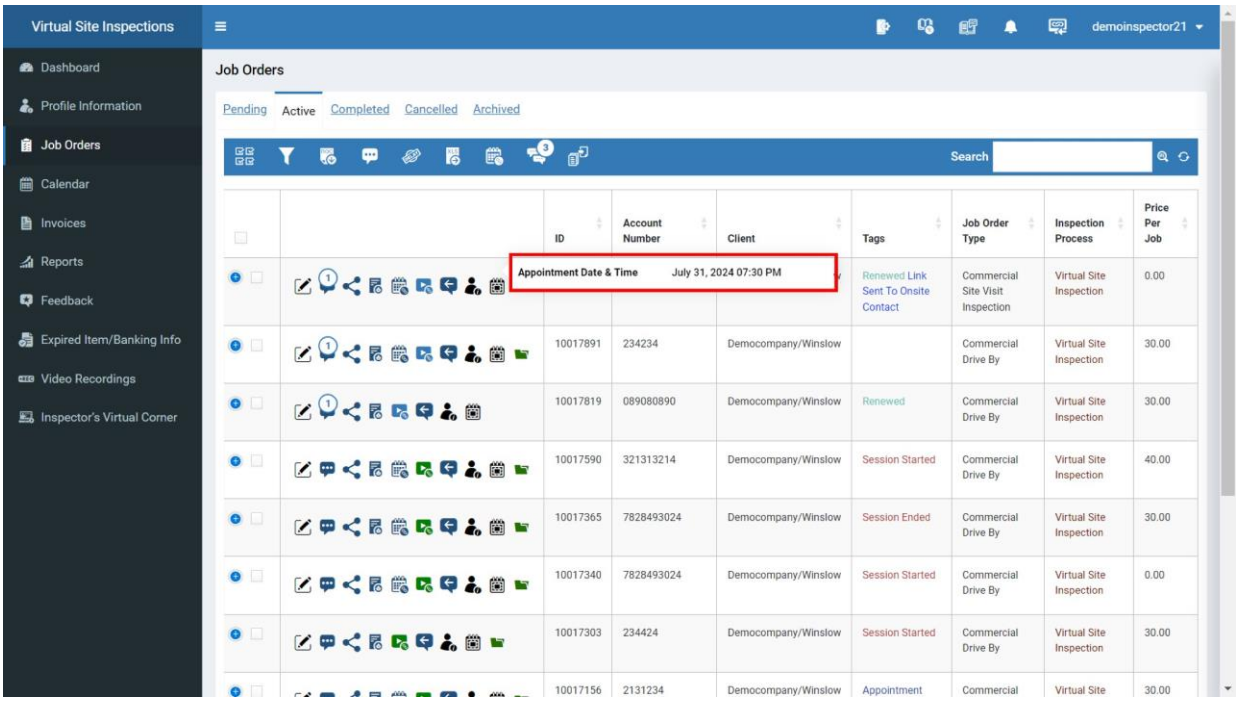


On clicking the send back reason icon, It will show that job order send back/redo reason otherwise It will show reason ‘there is no Re-Do tag available’ in dialog.



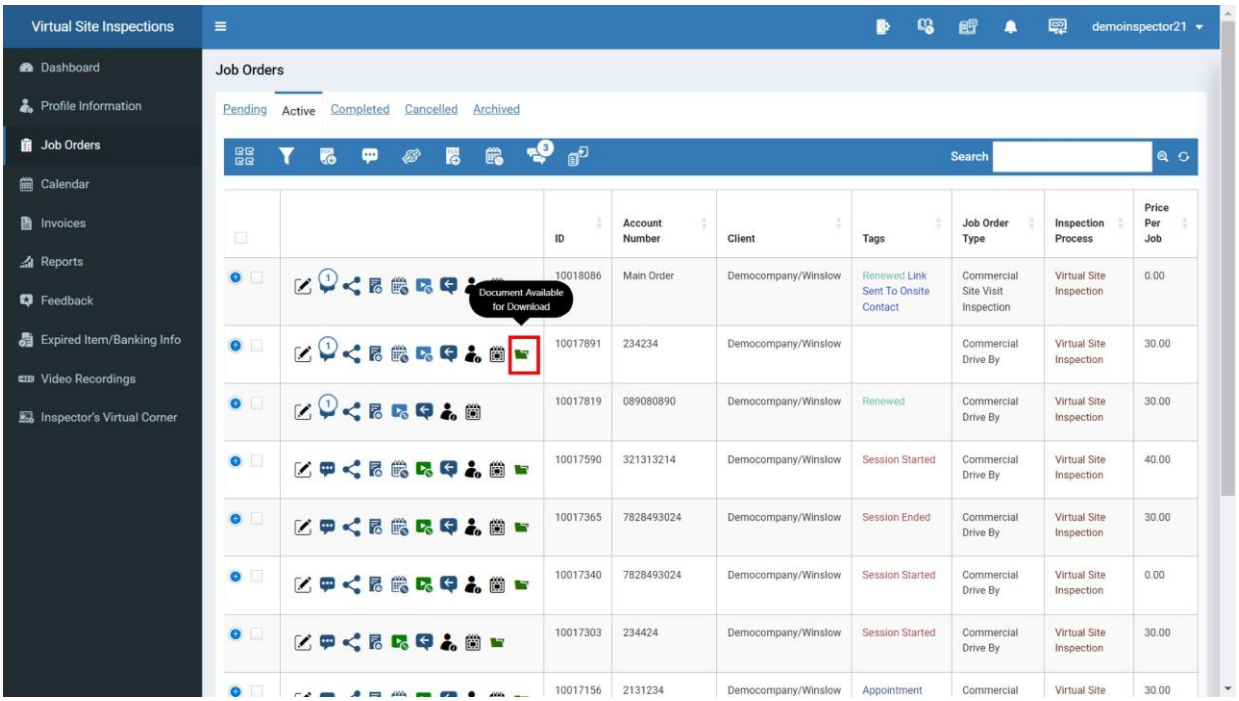
Appointment Date & Time

This feature shows the appointment date and time if the appointment is scheduled for the job order otherwise It will show N/A, as illustrated in the provided screenshot.The "Appointment Date and Time Display" feature enhances visibility and organization by presenting crucial information about scheduled appointments for specific job orders. This feature is designed to streamline the process of managing appointments, ensuring that relevant parties have quick access to appointment details.



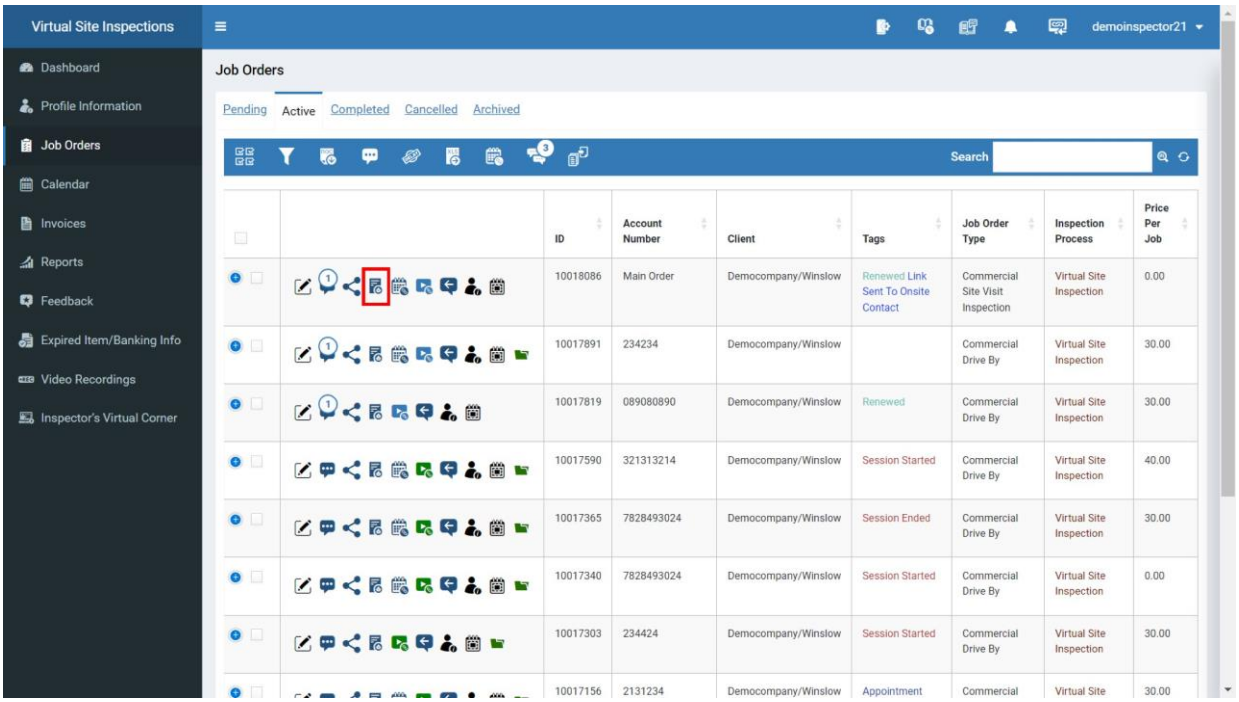
Document Available for Download

In the "Edit" or "Create Job Order" process, when the "Client Letter Campaign Series" is selected or other files are uploaded, the document availability icon appears in the job order grid. Conversely, if these conditions are not met, the icon will not be displayed in the grid, as depicted in the provided screenshot.

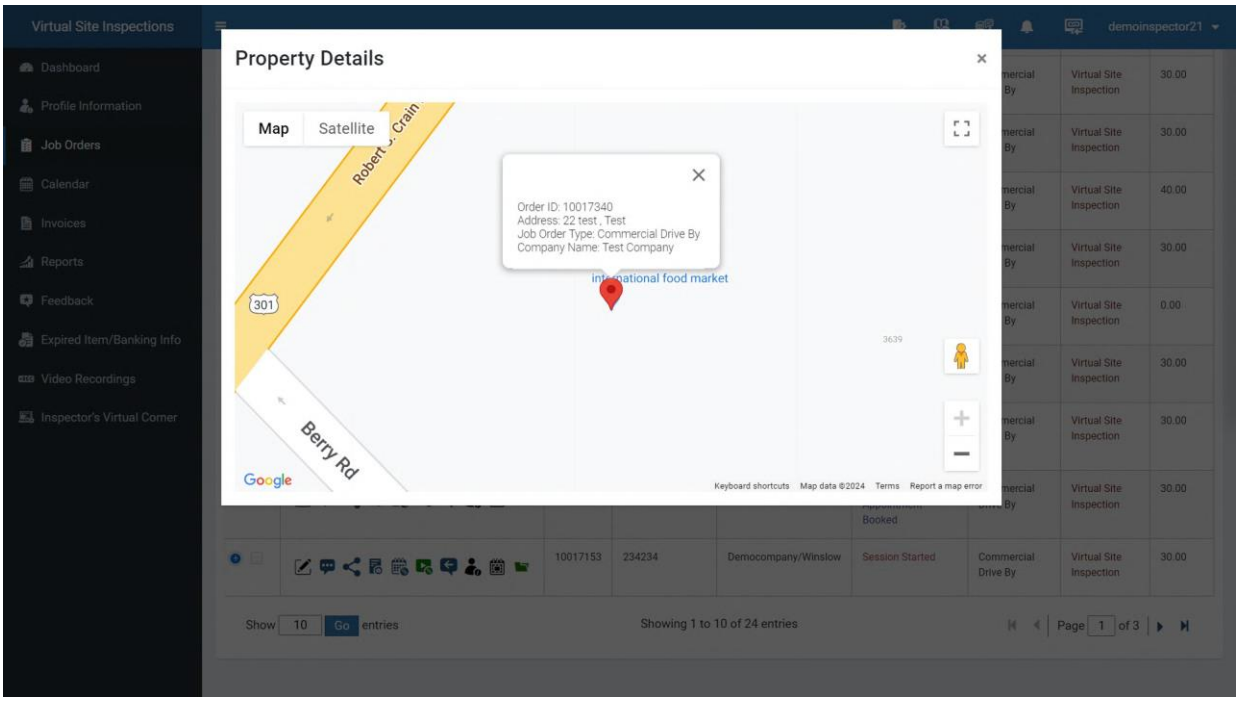


Property Details

The "Property Detail" icon is utilized to display the real-time location of the property associated with the job order.

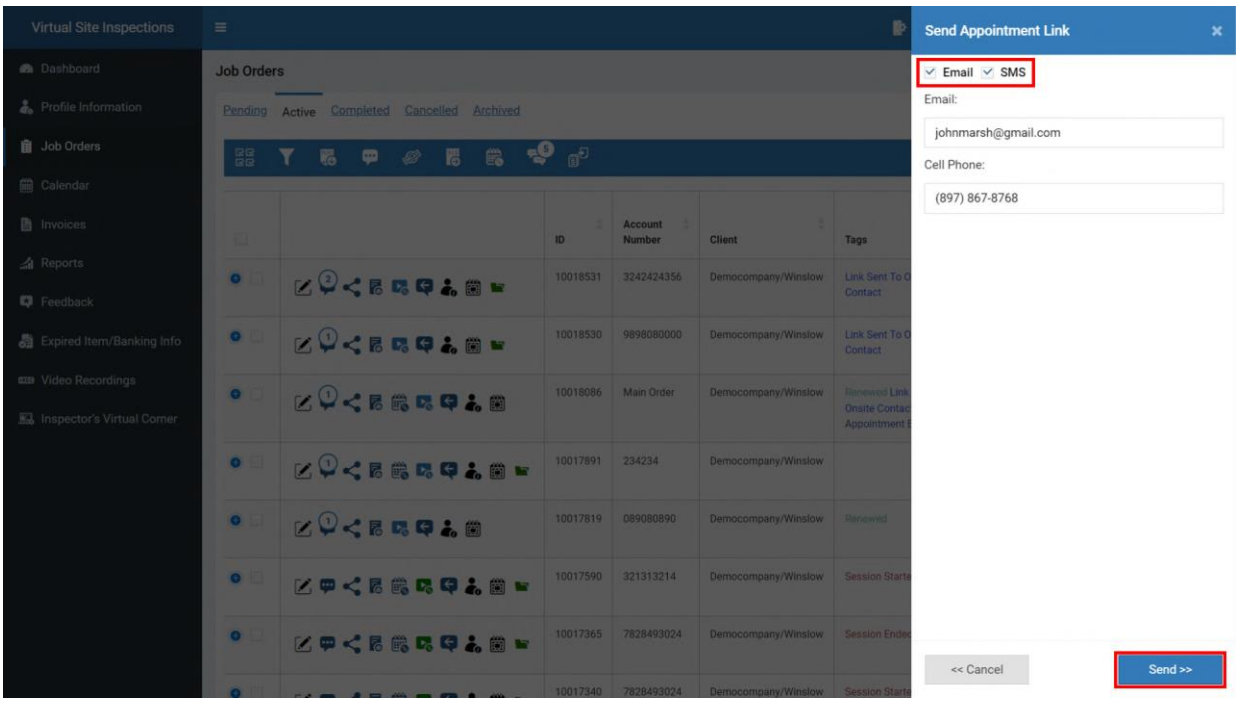


Upon clicking the property detail icon, a pop-up will appear on the screen with two options: map view and satellite view. By default, the map view is displayed, indicating the location with associated details. To switch to satellite view, users can tap on the respective button, which will open the satellite view along with additional details.Additionally, if users drag the Pegman icon onto the map view, it reveals a street view image.



Send Appointment Link

The "Send Appointment Link" feature is designed to dispatch an appointment link to the onsite contact. When activated, it opens a side modal presenting two options: Email and SMS. If the email checkbox is selected, the modal displays an email box pre-filled with the onsite contact's email. Alternatively, if the SMS checkbox is chosen, the modal shows a Cell Phone text box populated with the onsite contact's number. Clicking the "Send" button transmits the appointment link to the onsite contact through the selected communication method.



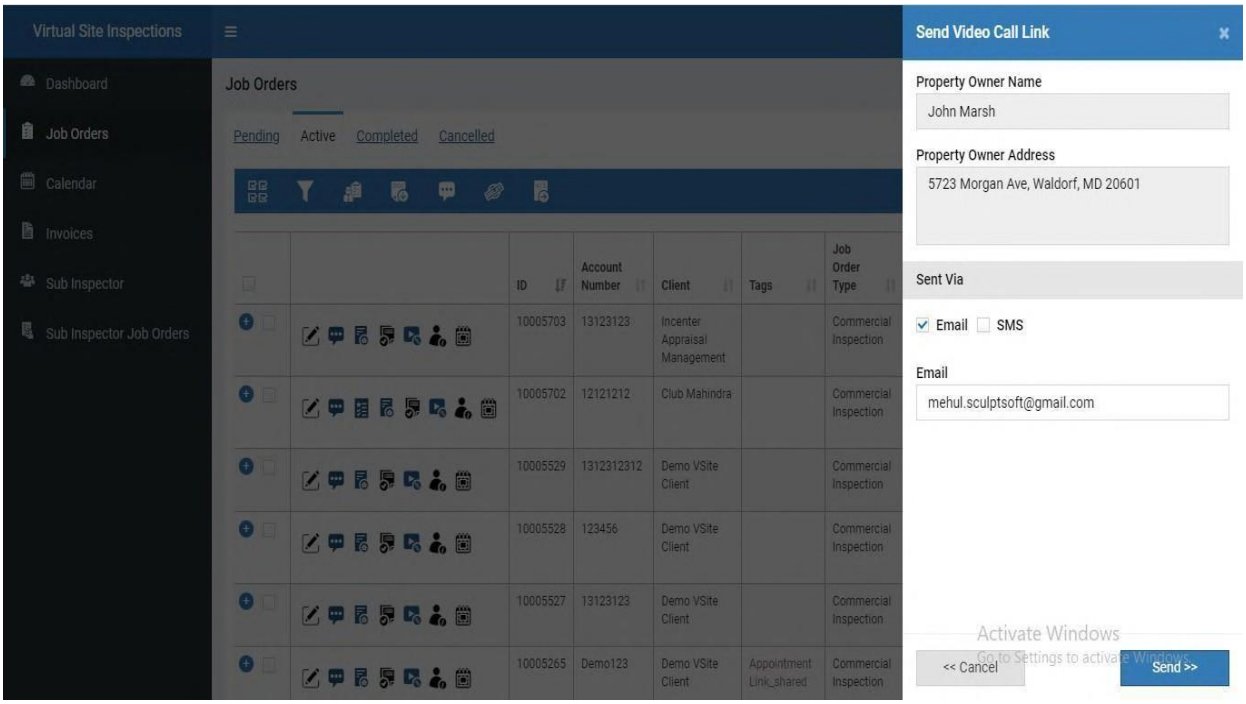
Inspect a Property through a Video Call

An inspector can set a video call with the property owner and inspect a property virtually.

On the job order page click on the button; ‘Send Video Call Link’ from the buttons in the second column cell.

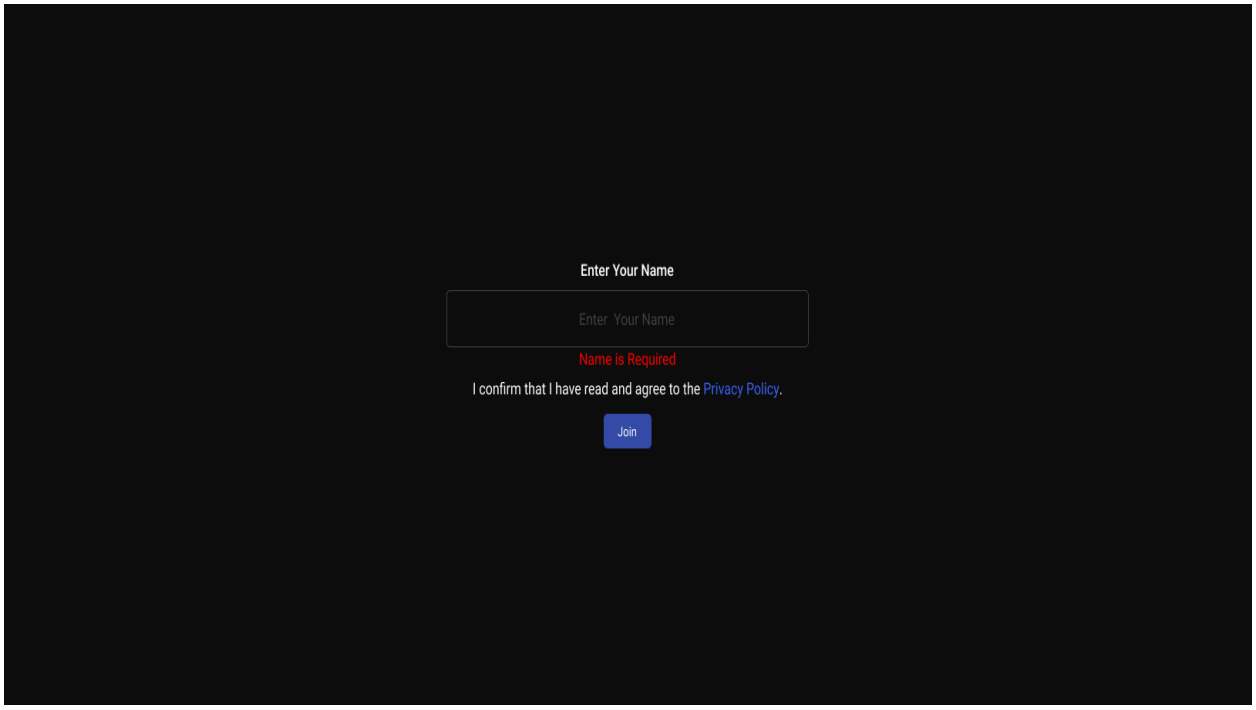
After clicking on the button, a new dialogue box will appear.

The dialog box appears displaying the details of the customer; such as ‘Property Owner Name’, and ‘Property Owner Address’.



You can then choose to send a video link to the customer by Email, SMS text, or both. All you need to do is to select the options per your need.

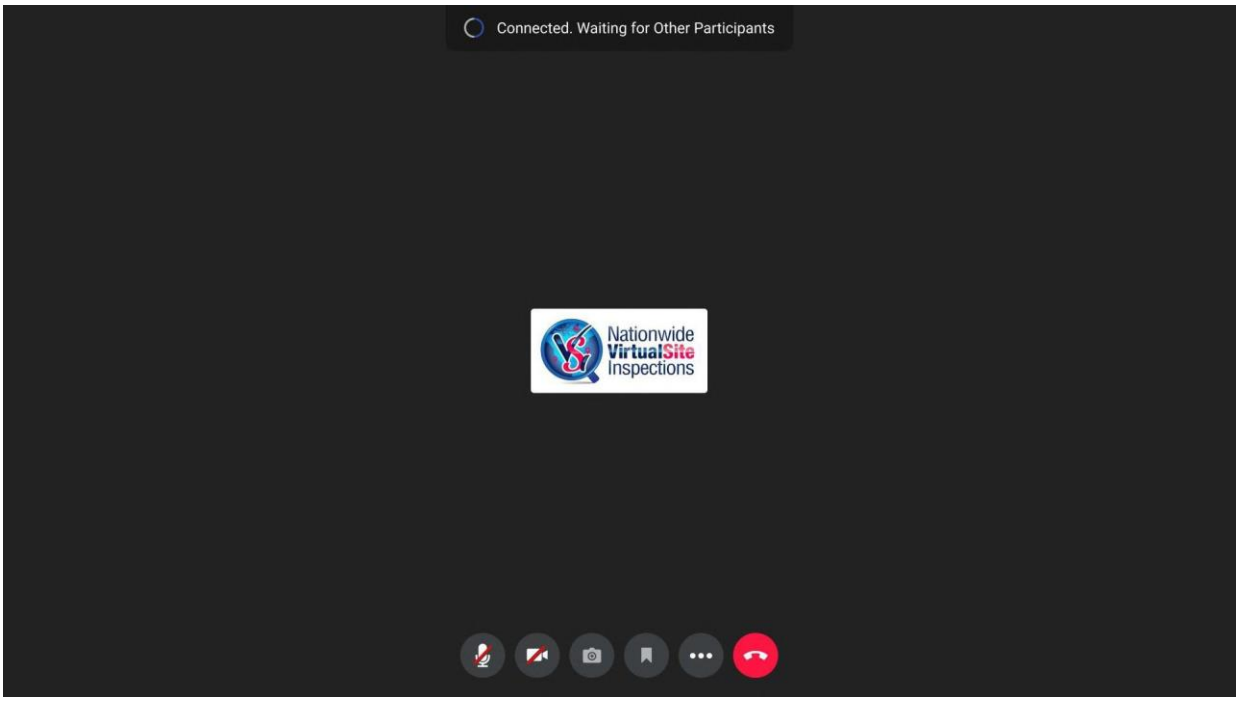
When you hit the ‘send’ button, a video link will be sent to the property owner and a new window for video call will appear in your system.



A dialogue box in this new window will prompt you to enter your name.

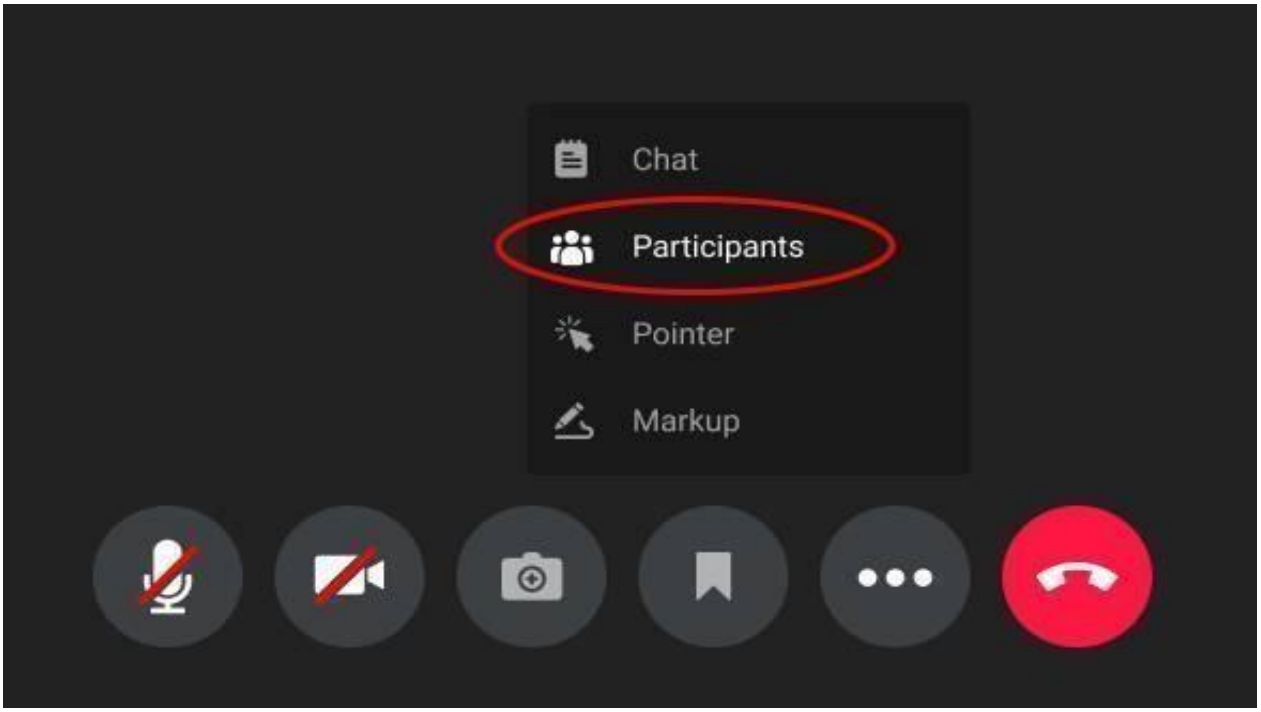
You can also see the privacy policy for the video call.

Once you enter your name, click the ‘Join’ button and you will be on the video call.



As an inspector, you are provided with various features which can help make it easy to perform your virtual inspection. However, these tools will be visible and functional once only after any of the invited members joins the scheduled virtual call.

You can check the details of the participants by clicking on the button ‘Participants’ given at the bottom of the screen. This will tell you how many and who has joined your video call.



Once the customer connects to the video call using the link sent to him/her, your video screen will also appear. Remember, this will not be active until at least one invited participant joins the scheduled virtual call.

Audio-Video

You are also given a choice to turn on or off your microphone and video. You can turn it on or off as per your inspection requirements.

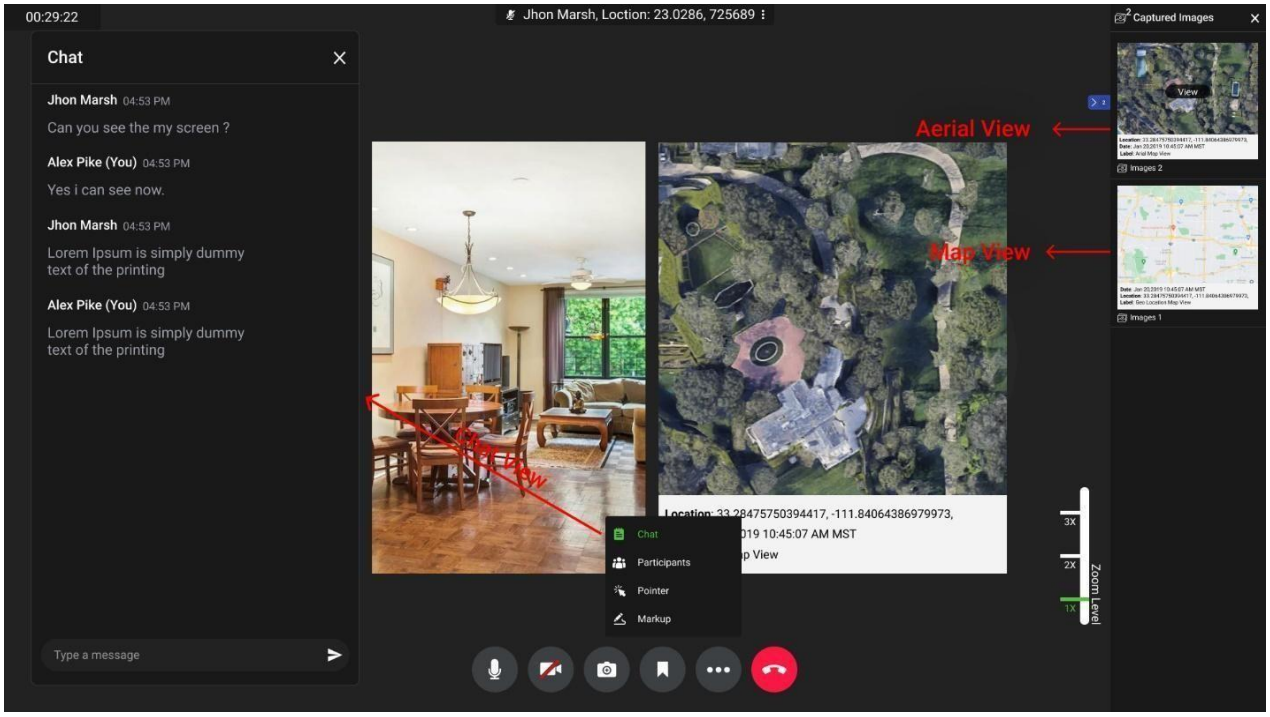
There is a maximum of four participants including the inspector who can join a video call.

Map and Aerial View of a Property

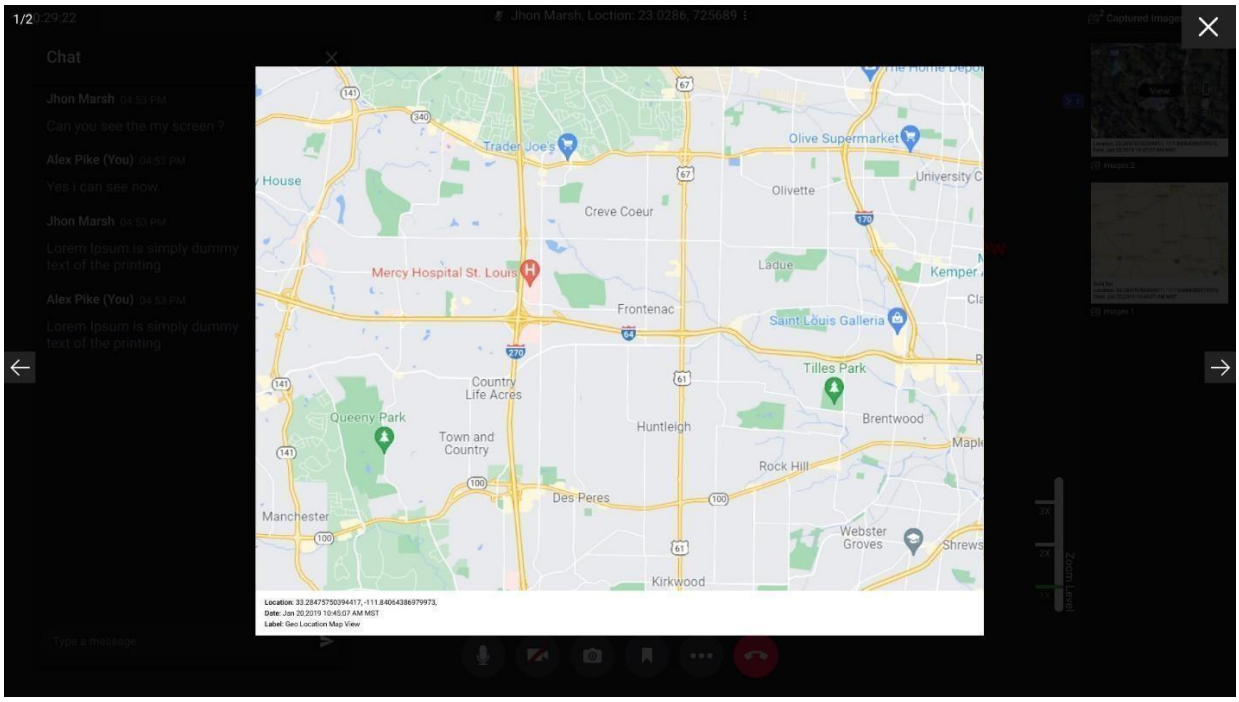
One of the important parameters for inspecting any property is its location. This service provides detailed location-finding technology providing you with location coordinates and a map with an aerial view.

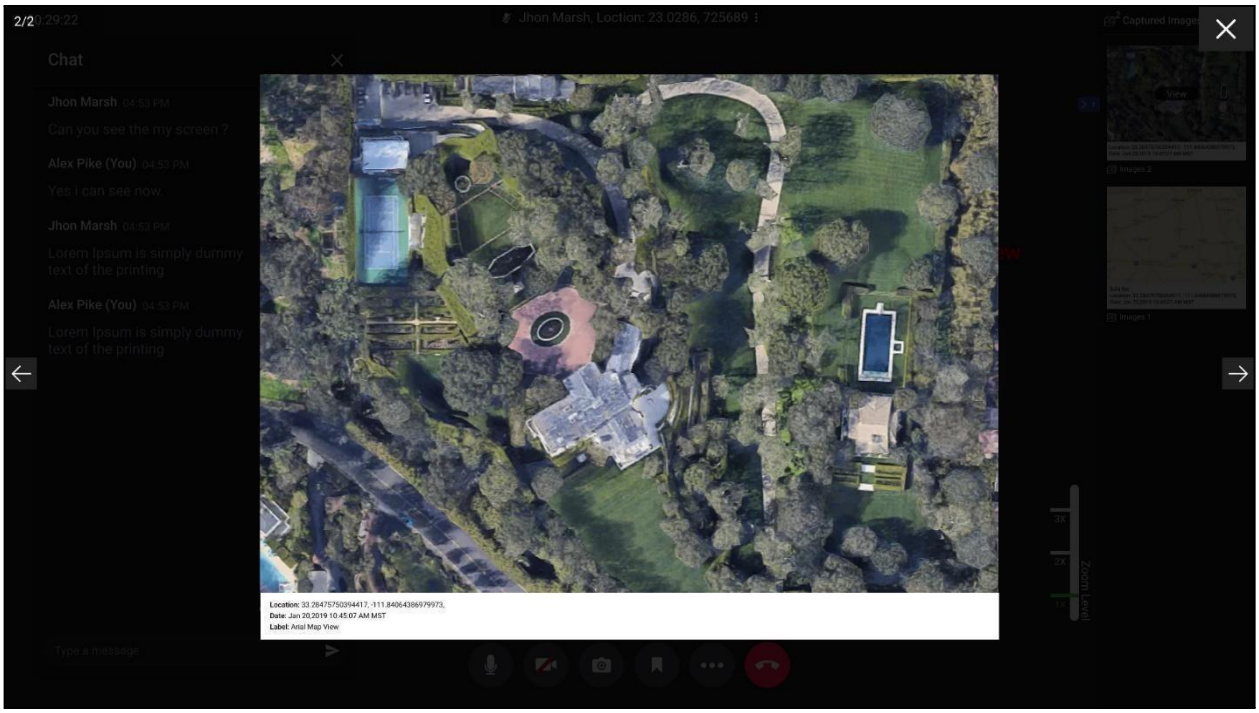
The moment a property owner joins a video call, the system adds two images of the location of the property in the sidebar.

The first image is of the location of the property on the map and the second image is the aerial view of the property with a red dot for easy identification. Again, these images display location coordinates as well.



To view the images closer, use your cursor and hover over the image and a ‘view’ button will appear. Click on the button and the image will open. Now you can see the property on the map or aerial view for closer examination.



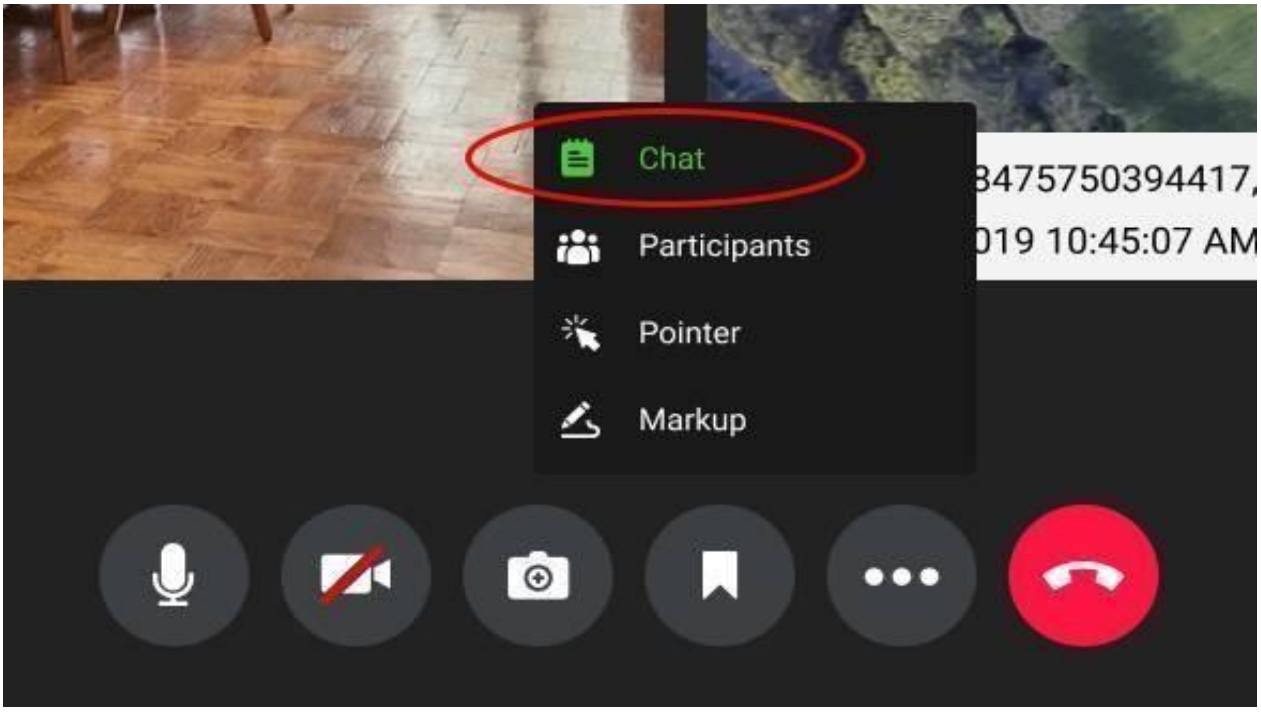


Note: The property owner will be asked for permission to capture the location. The images of the location will be captured only if the property owner allows it.

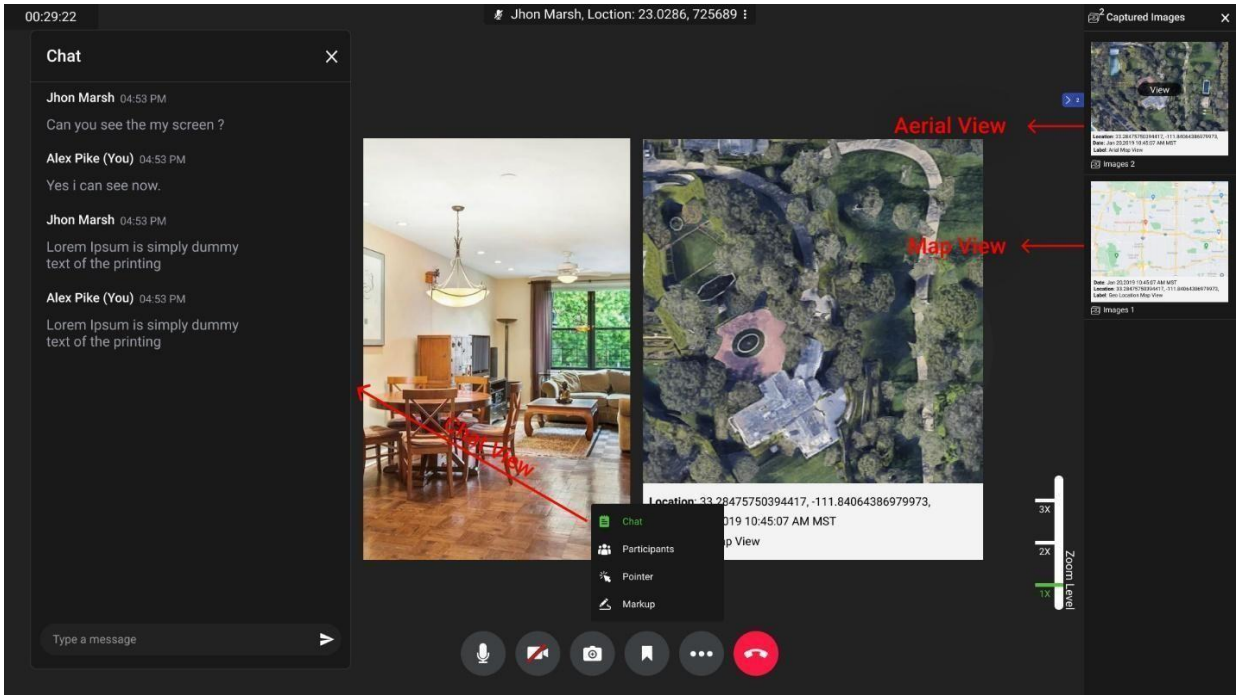
Chat During Video Call:

You can also exchange messages with all participants of a video call.

You have the capability of chatting with any and all participants on the call. A chat button is available at the bottom of the screen to do this.



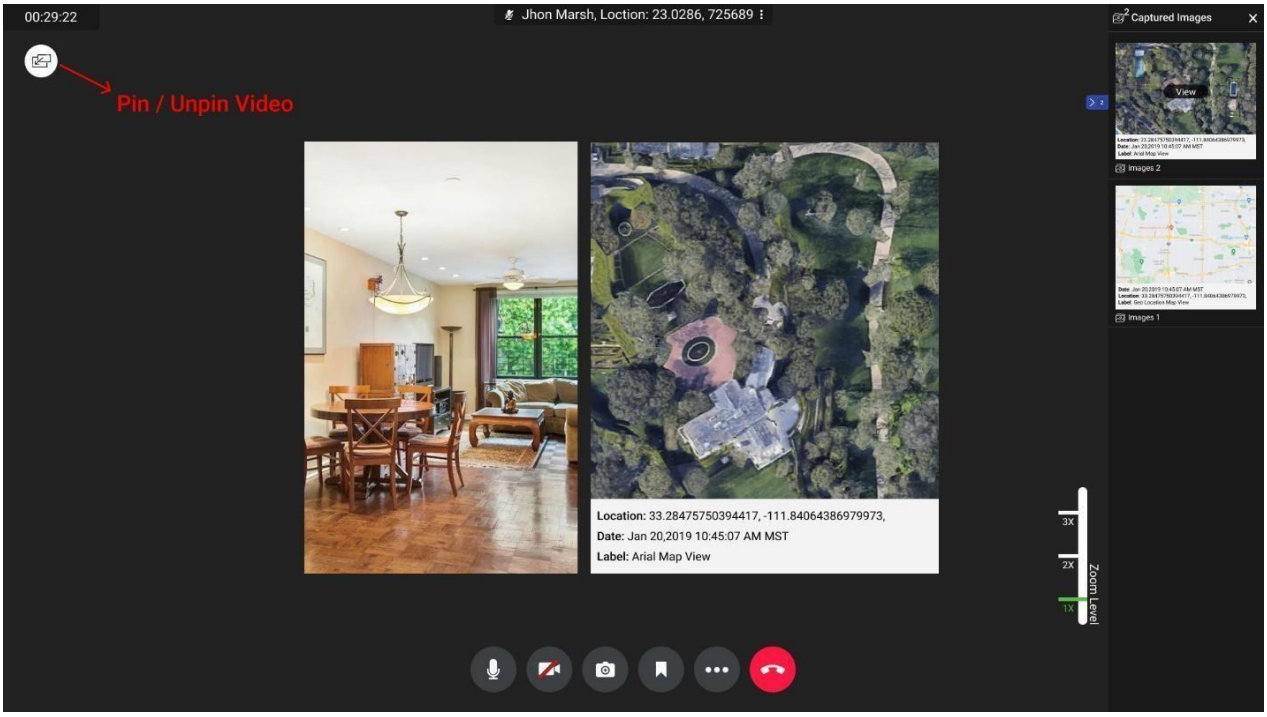
Click on the button and a new dialogue box will open wherein the participants can exchange messages during a video call.



Labeling Images

While inspecting a property, if you wish to mark any part of the property, you can capture an image and label it.

Before capturing and labeling an image, you need to pin the screen. However, the option of pinning a screen is available only when the video is on. Hence, make sure the video is on to pin the screen at the upper left corner. The screen you pin comes in the center screen and other screens will disappear.



Now, all you need to do is click on the ‘Labels’ button at the bottom of the screen.

The moment you click on the button ‘Labels’ it will capture an image of that part of the property which is visible on the screen.

The image will automatically be added in the sidebar menu with a previously designated label such as; drawing room, bedroom, kitchen, etc. so you can identify a part of the property easily.

To verify that you have labeled the image correctly, click on the image from the sidebar menu and the image will open. You can see a label added at the bottom of the image.

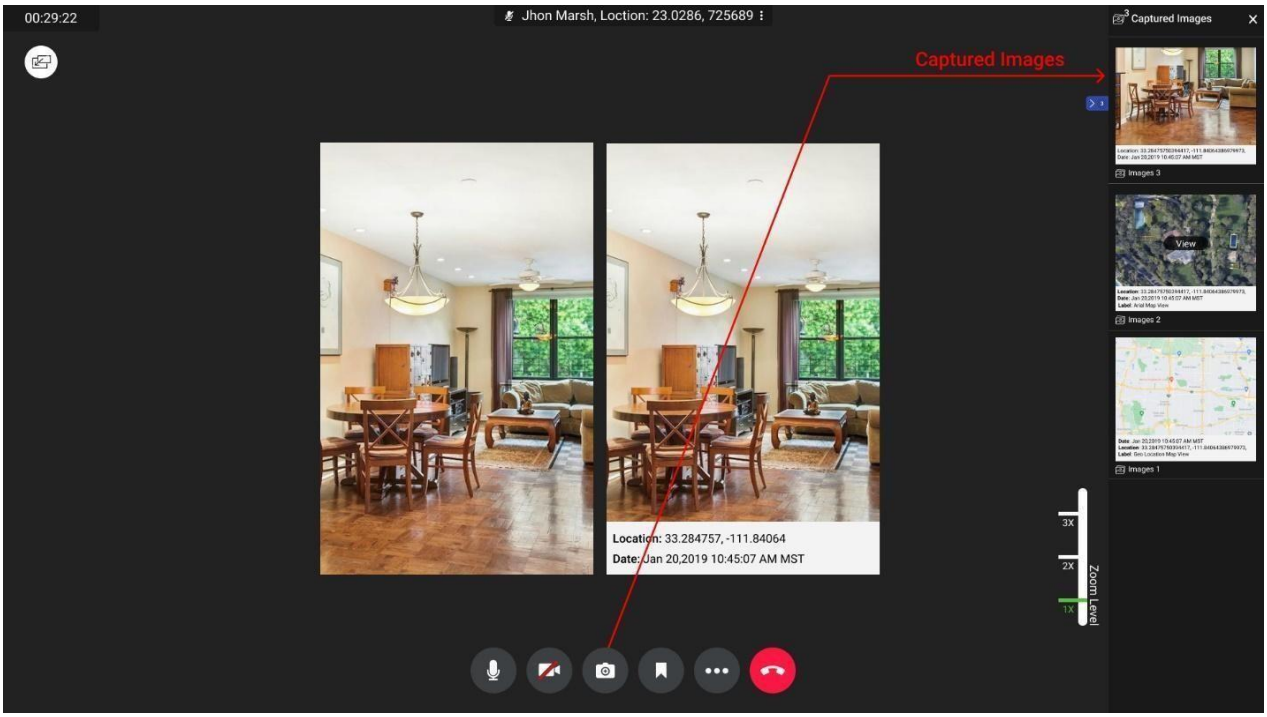
Capture Image

It is vital to ensure that you are capturing all of the important parts of a property. This allows you to inspect the property closely and capture all required and supporting images. The tool, 'Capture Image' will help you to do this.

Click on the 'Capture Image' at the bottom of the screen and a screenshot of the pinned video screen will be taken and added to the sidebar automatically.

View Captured Image

To see the image you captured, hover your cursor on the specific image in the sidebar and the 'View' button will appear. Click on the button and the image will open.



If you have captured multiple images, you can also scroll the images from the left and right arrows.

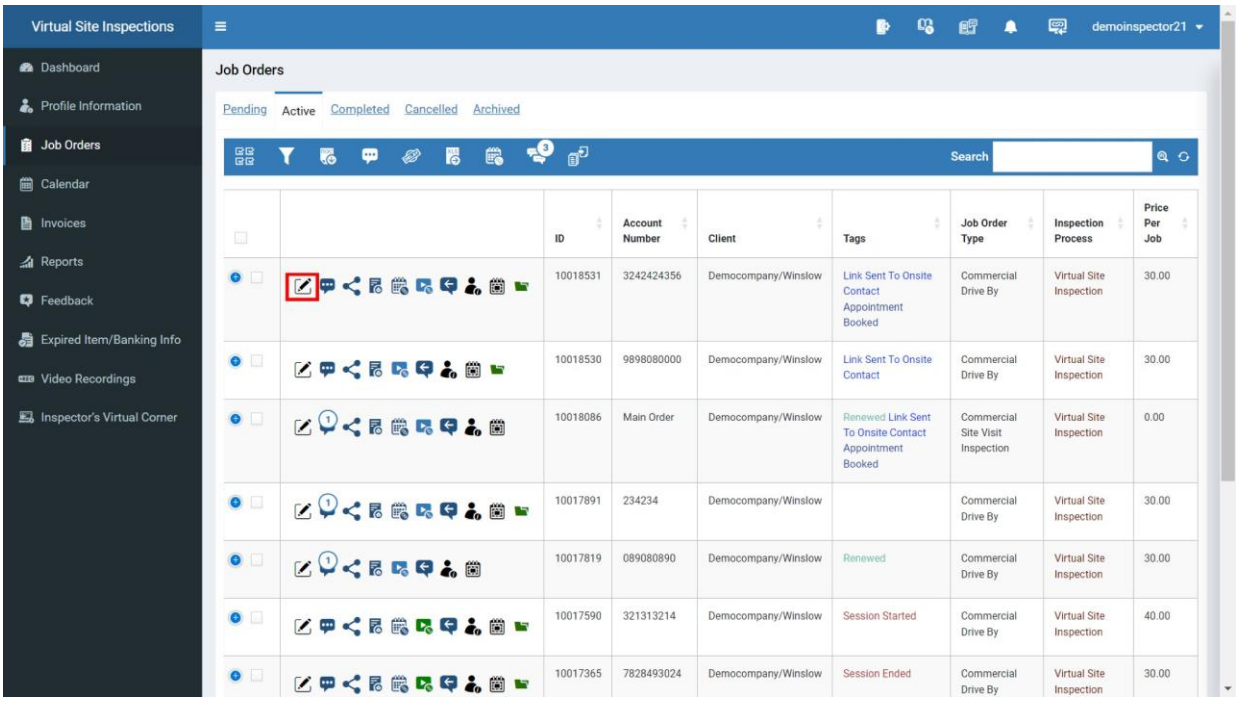
Note: The functions of the label and capturing images are available only when the screen is pinned. Otherwise the features will remain disabled.

View Labels and Captured Images after the Call

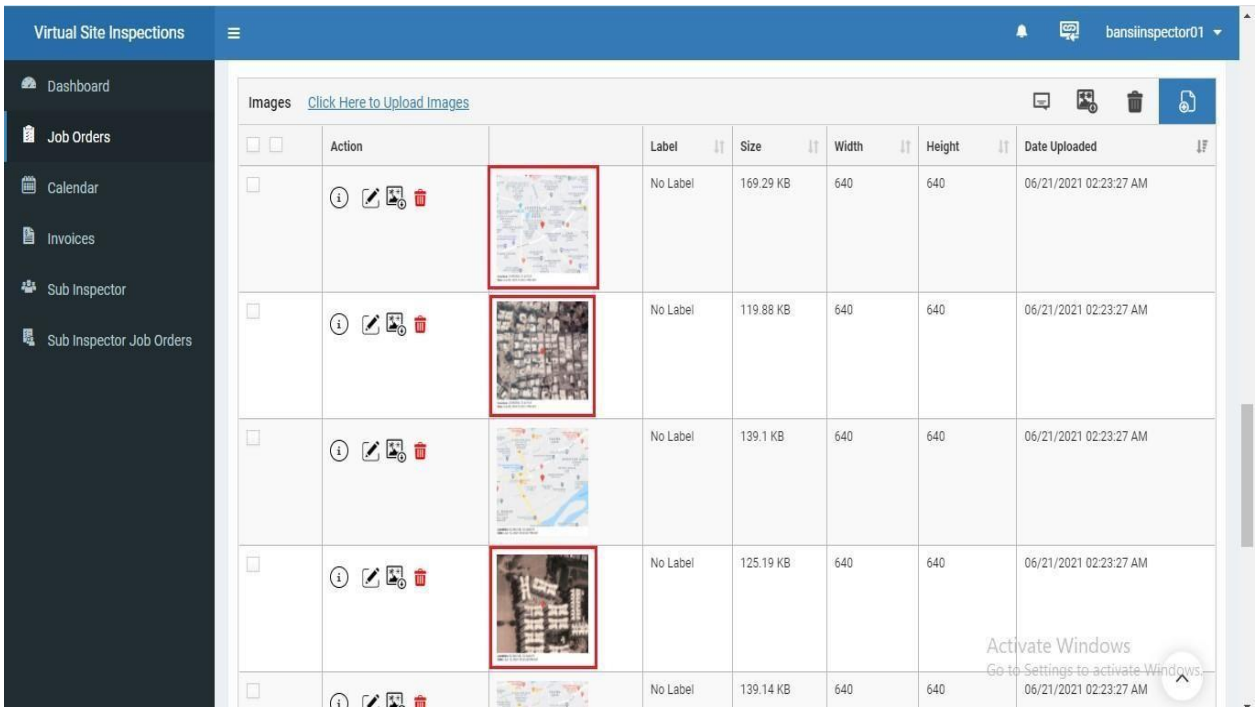
The images and labels you captured during a video call will be available to you any time you wish to see them again. You can see the images even after a video call so that you can make informed decisions about the property you are trading in.

Go to the job orders as has been shown in step 1 of Job Orders.

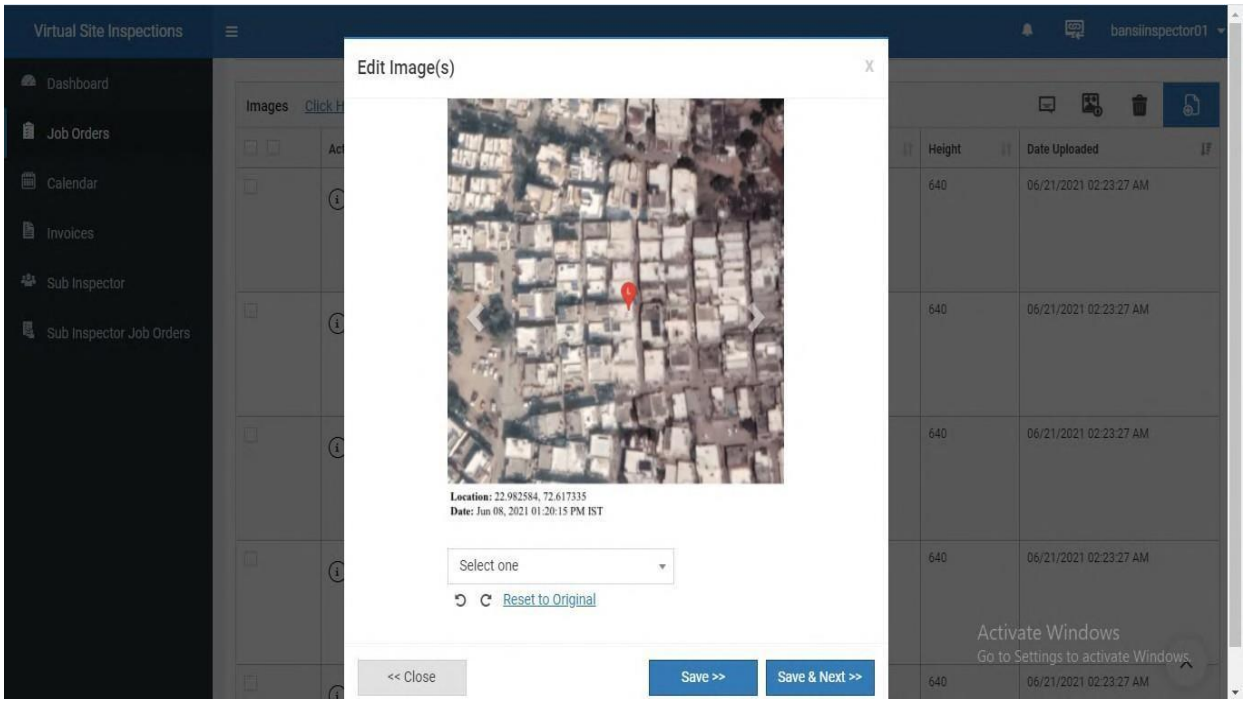
There you find an edit button as shown in the below image. Click on the button and a new page of ‘Edit Order’ opens.



Scroll down the page and a list of all the images will be available to you as shown in the following image.

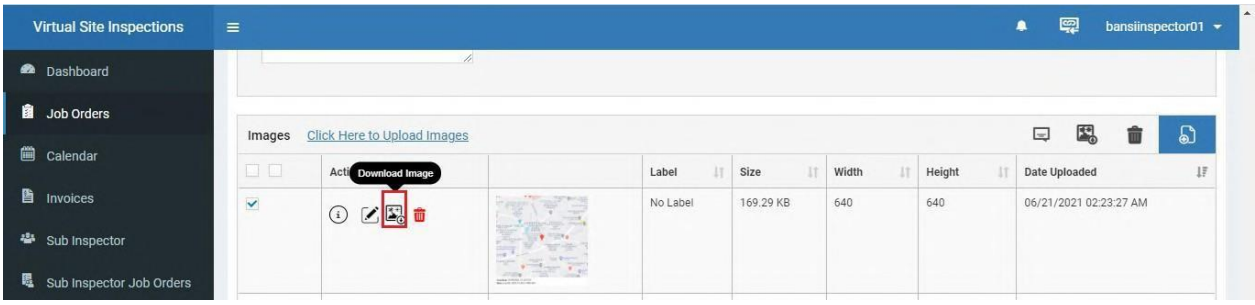


From all the images and labels, click on any of the images you wish to see and the image will be open.



Not only you can see the images but also store the images on your device. All you need to do is click on the ‘Save’ or ‘Save & Next’ button as shown in the above image and the image will be downloaded and stored on your device. Click the button ‘Save’ when you want to only save the image on your device. Click the ‘Save & Next' button when you wish to save the image and also move to the next image.

You can also download an image directly from the main page of ‘Edit Order’ itself. Just click on the button ‘Download Image’ from the menu bar as shown in the below image and get the image stored in your device.

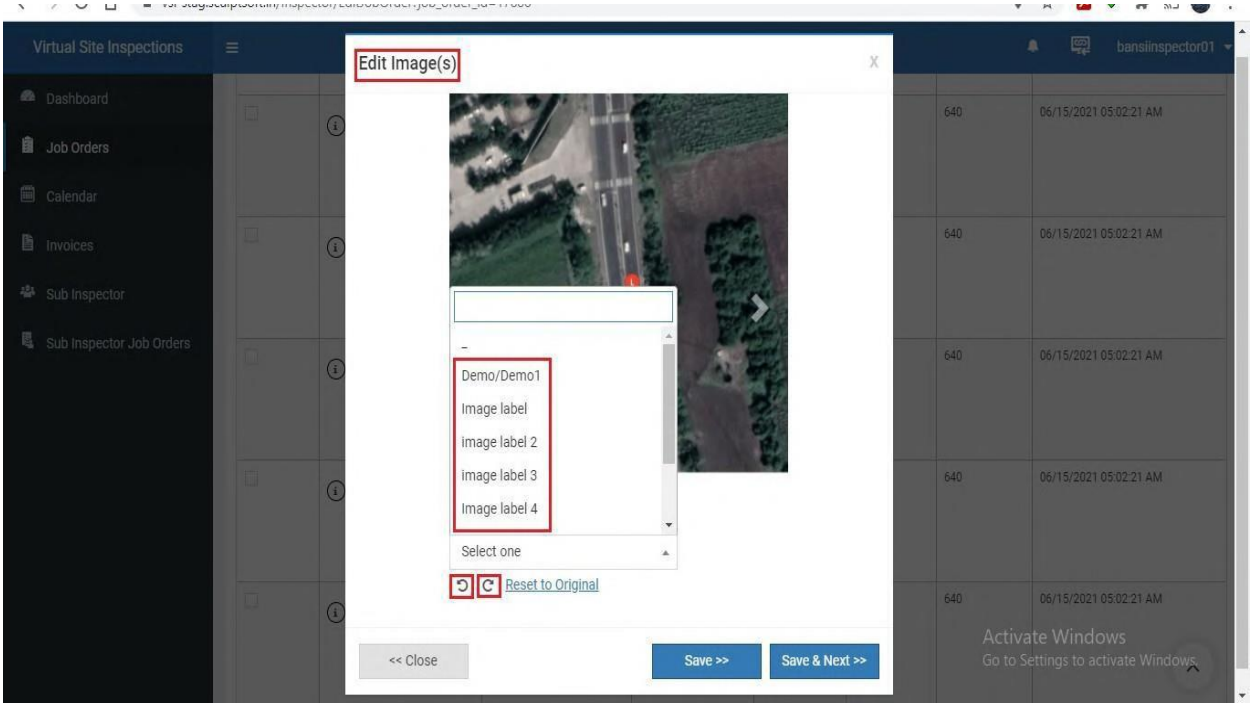


The system also provides a facility for downloading multiple images at one click. Select the images you want to download by checking the box in the first column.

Now click on the button ‘Download Selected Images’ given on the right side of the title bar and the images will be stored on your device. See the image below.

In case you want to edit any image, this feature is also available to you. Click on the button ‘Edit’ from the second column and the image will open.

Now, you can add a label to the image and also rotate the image as per your need. See the image below.

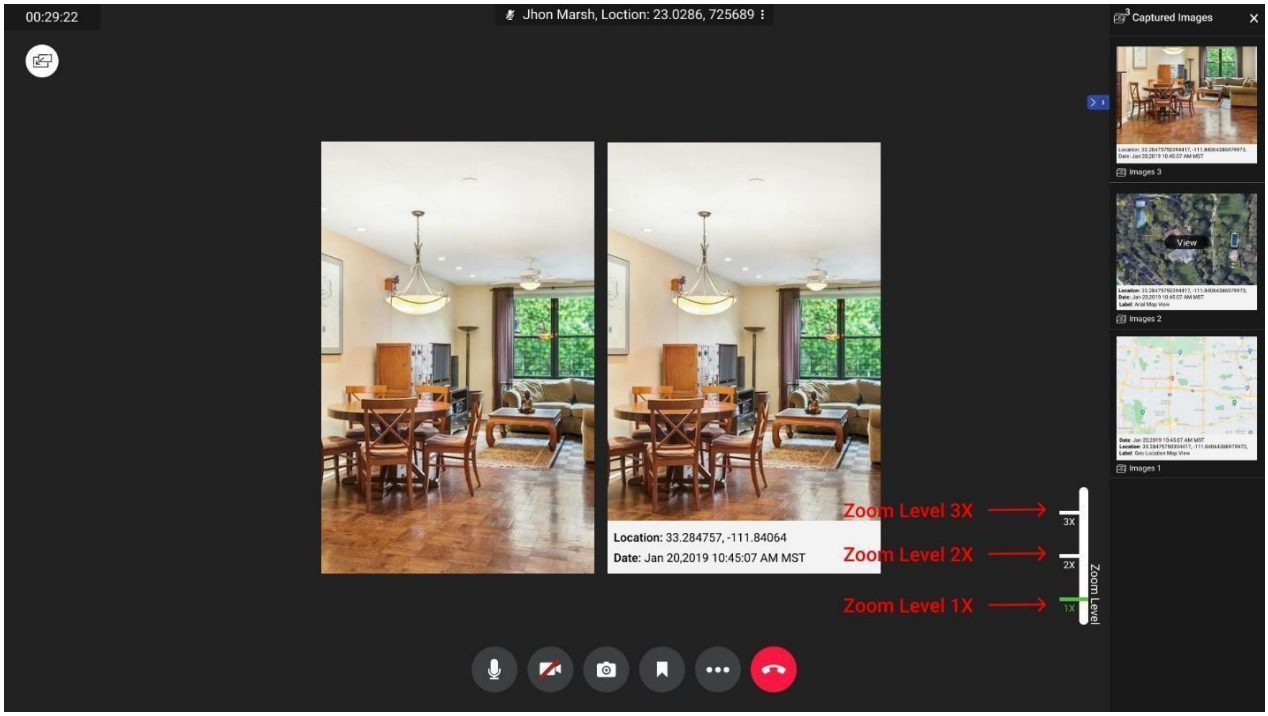


Zoom the Screen for Close Inspection:

If you need to take a closer look at any part of the property, you also have the capability to zoom in on the screen. You can zoom in on the screen of any participant within the video call.

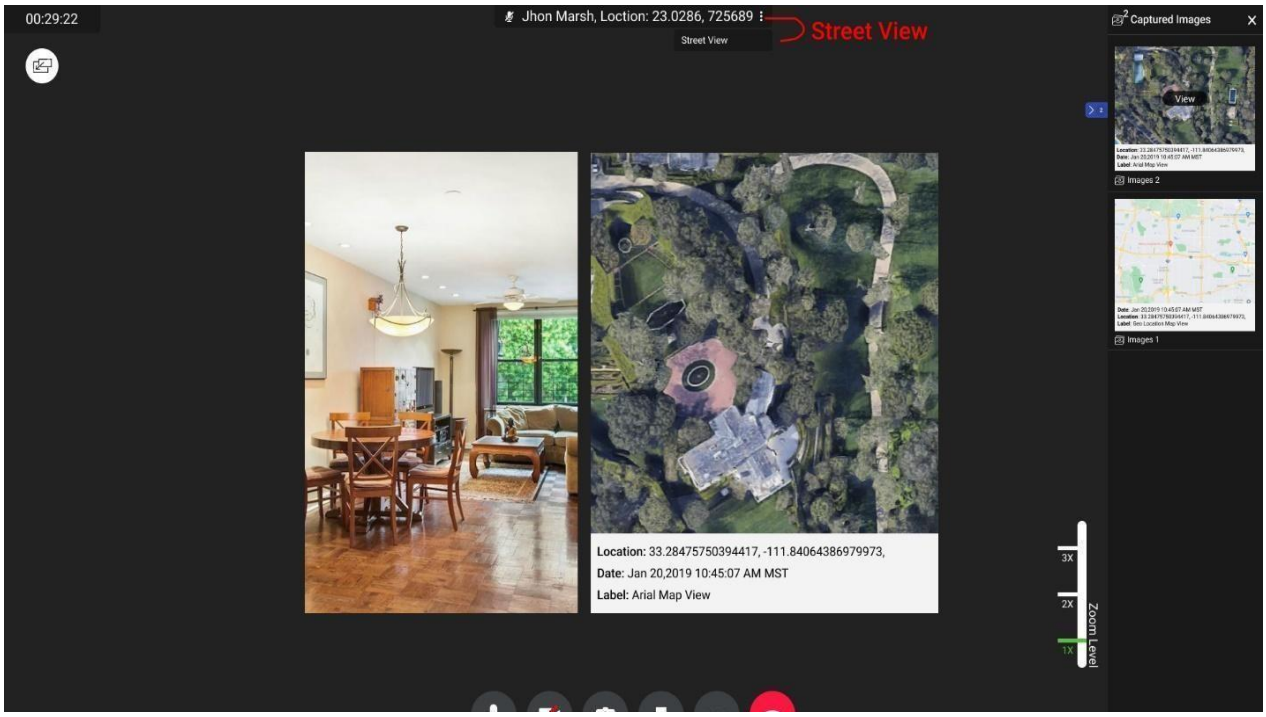
Pin the screen you want to zoom in on.

The moment you pin a particular screen, a three-level zoom menu will appear on the screen.



Click on the zoom level as needed, and you can see the screen zoom in or out.

Street View



While inspecting the property, it is important to not only to see the property but also to see the surrounding areas of the property. The convenient tool, ‘Street View’ gives you this capability.

Pin the participant’s screen.

To display a street view and to look at the surrounding area of a property, pin the screen of that particular participant of the video call at the upper left corner.

After a screen is pinned, click on the kebab menu (three horizontal lines) at the top of the screen and the ‘Street View’ will appear. Click on that button.

After clicking the ‘Street View’ button, a new window appears showing you the street view. You can now see the surrounding areas and scroll the screen as you need.

Inviting Participants during a Video Call

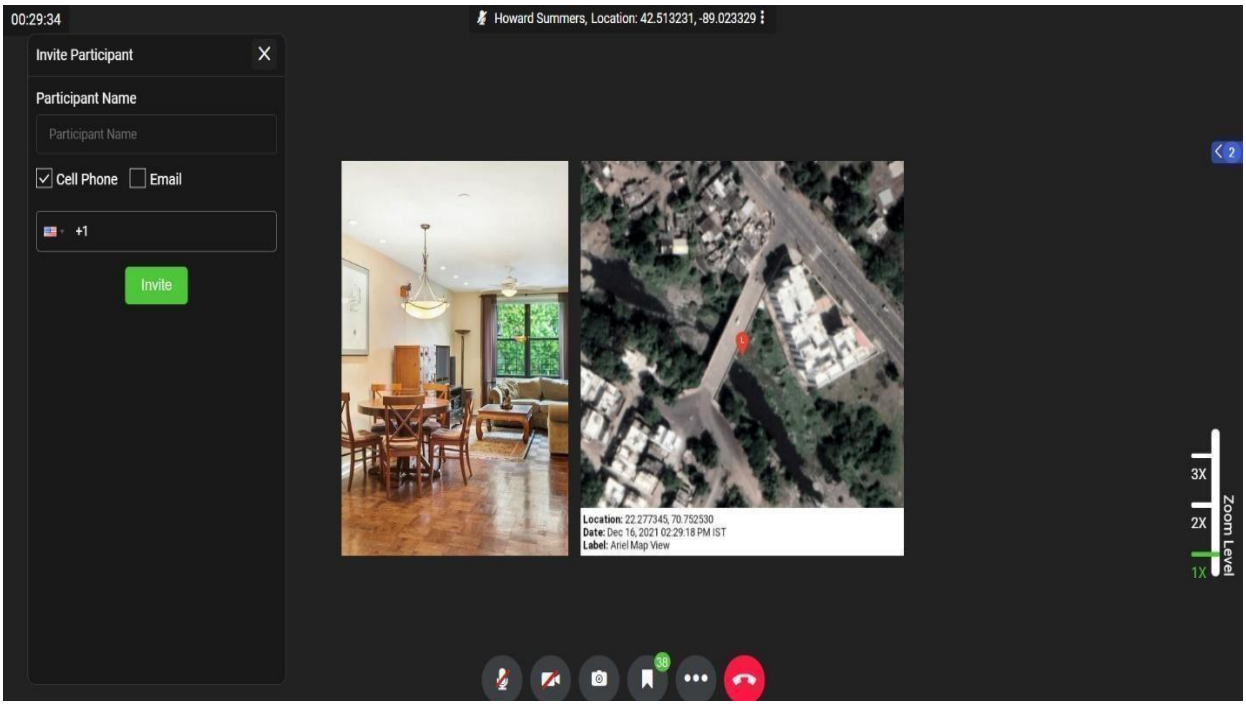
An invitation for a video link is sent to the customer at the time of setting a video meeting. However, as an inspector, if you want somebody to join the meeting while the meeting is going on, you have the capability to do so. You can invite any participant to join the video meeting at any time during the meeting.

Click on the button ‘Invite Participants’ given at the upper right corner of the screen.

The moment you click on the button, a new dialogue box will appear at the top left corner of the screen.

Enter the name of the person you want to invite and select the option of communication i.e. cell phone or email and press the button ‘Invite’ to send an invitation.

You can send this invitation by email, cell phone SMS text, or both.



Virtual Assistant

We understand the importance of keen observation of the properties while making deals with them. It is the acute inspection of the property that helps make the deals in our favor. This platform equipped with a range of tools provides all the facilities for such acute inspection. However, it is likely to happen that an inspector is occupied with many things at a time during a video call which may cause him to miss out on a thing here and there. Therefore, this platform also provides a facility of having an assistant to the inspector. The inspector can now take the help of a virtual assistant to inspect the properties closely and not miss out on any important aspect. As an inspector, all he/she needs to do is to invite a virtual assistant to join a video call for an inspection. Once the virtual assistant joins, he/she can be of assistance to the inspector for close inspection of the property in the following ways.

Joining a Video a Call

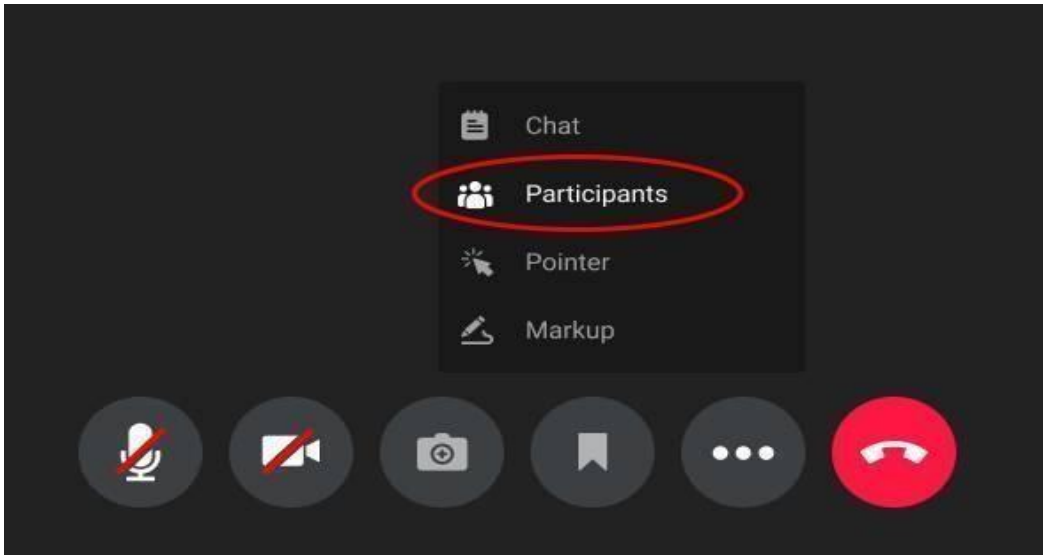
A virtual assistant can join a video call through an invitation link sent by an inspector. The steps for inviting a virtual assistant to join a video call are mentioned in the manual for inspectors under the title ‘inviting participants during a video call’.

Upon receiving an invitation link, the virtual assistant can join using the link and start assisting the inspector.

Checking Other Participants

As an assistant to the inspector, it is important for you to know who the participants of the meeting are. That’s why you have the facility available to see the details of the participants. Once you join a video call for inspection of a property, you can see who the other participants are on the video call.

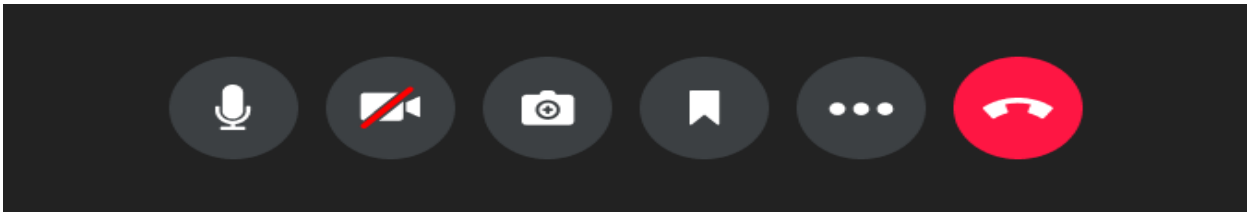
Click on the button ‘Participants’ given at the bottom of the screen. This will let you know how many and who has joined the video call.



Audio-Video Access

As your requirements for the inspection, you can turn on or off your microphone and video both.

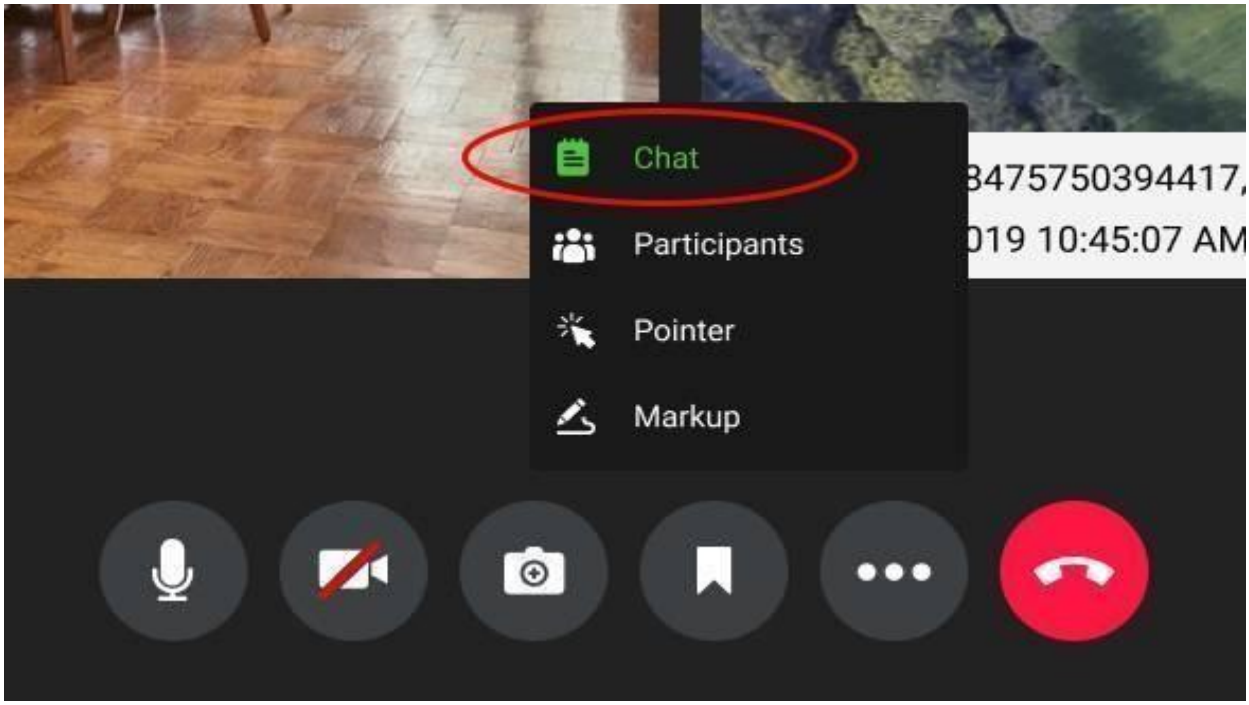
Just click on the button for ‘microphone’ and/or ‘video’ to get it on or off.



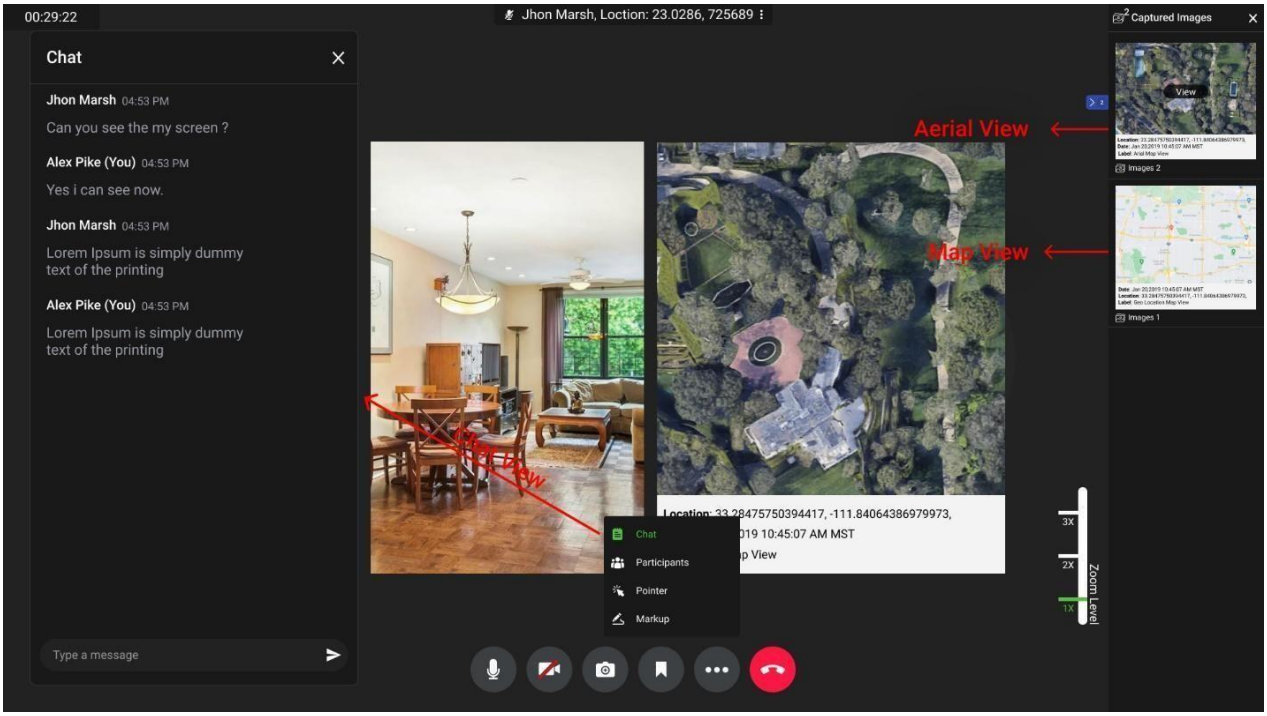
Chat During Video Call

You can also exchange messages with all the participants of a video call.

You have the capability of chatting with any and all participants on the call. A chat button is available at the bottom of the screen to do this.



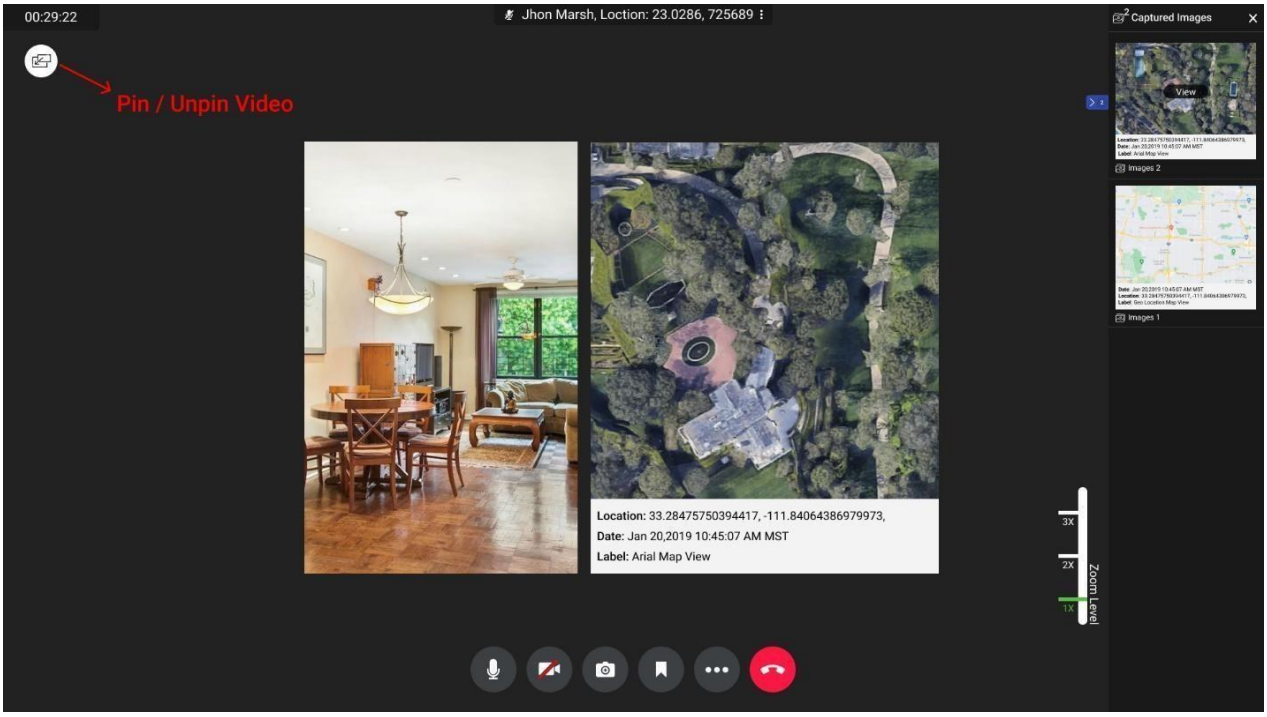
Click on the button and a new dialogue box will open wherein the participants can exchange messages during a video call.



Labeling Images

While inspecting a property, if you wish to mark any part of the property, you can capture an image and label it.

Before capturing and labeling an image, you need to pin the screen. However, the option of pinning a screen is available only when the video is on. Hence, make sure the video is on to pin the screen at the upper left corner. The screen you pin comes in the center screen and other screens will disappear.



Now, all you need to do is click on the ‘Labels’ button at the bottom of the screen.

The moment you click on the button ‘Labels’ it will capture an image of that part of the property which is visible on the screen.

The image will automatically be added in the sidebar menu with a previously designated label such as; drawing room, bedroom, kitchen, etc. so you can identify a part of the property easily.

To verify that you have labeled the image correctly, click on the image from the sidebar menu and the image will open. You can see a label added at the bottom of the image.

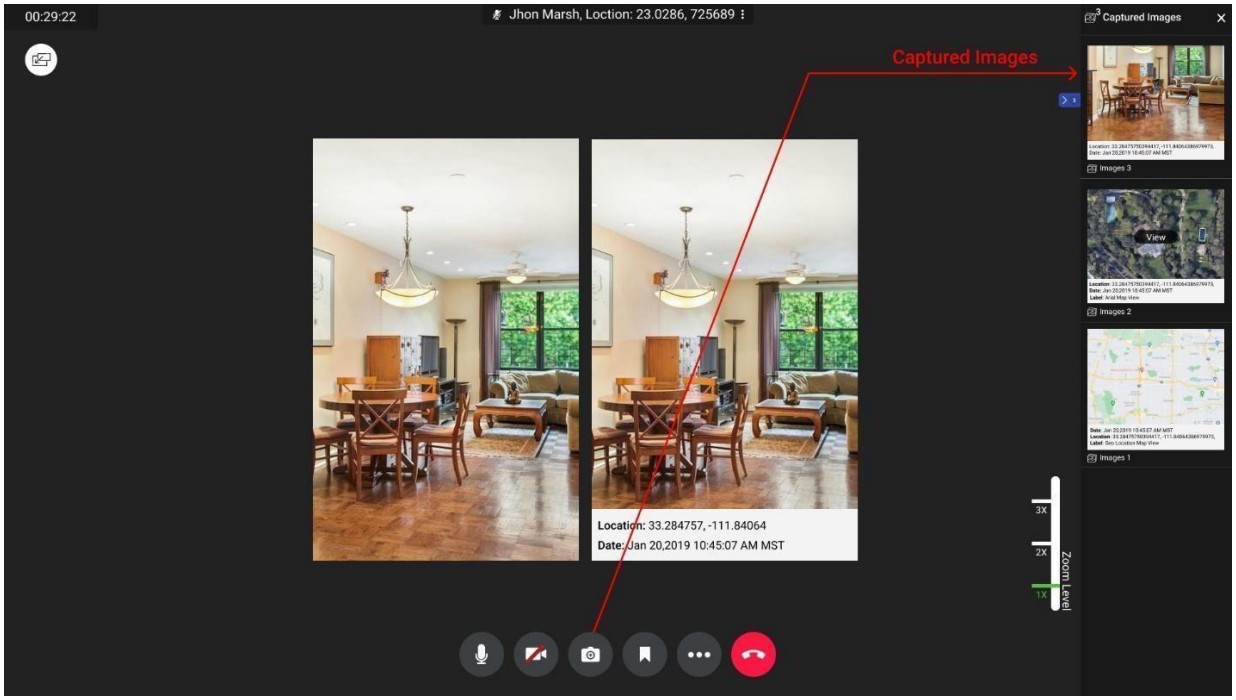
Capturing Images

It is vital to ensure that you are capturing all of the important parts of a property. This allows you to inspect the property closely and capture all required and supporting images. The tool, ‘Capture Image’ will help you to do this.

Click on the ‘Capture Image’ at the bottom of the screen and a screenshot of the pinned video screen will be taken and added to the sidebar automatically.

Viewing Captured Images

To see the image you captured, hover your cursor on the specific image in the sidebar and the 'View' button will appear. Click on the button and the image will open.



If you have captured multiple images, you can also scroll the images from the left and right arrows.

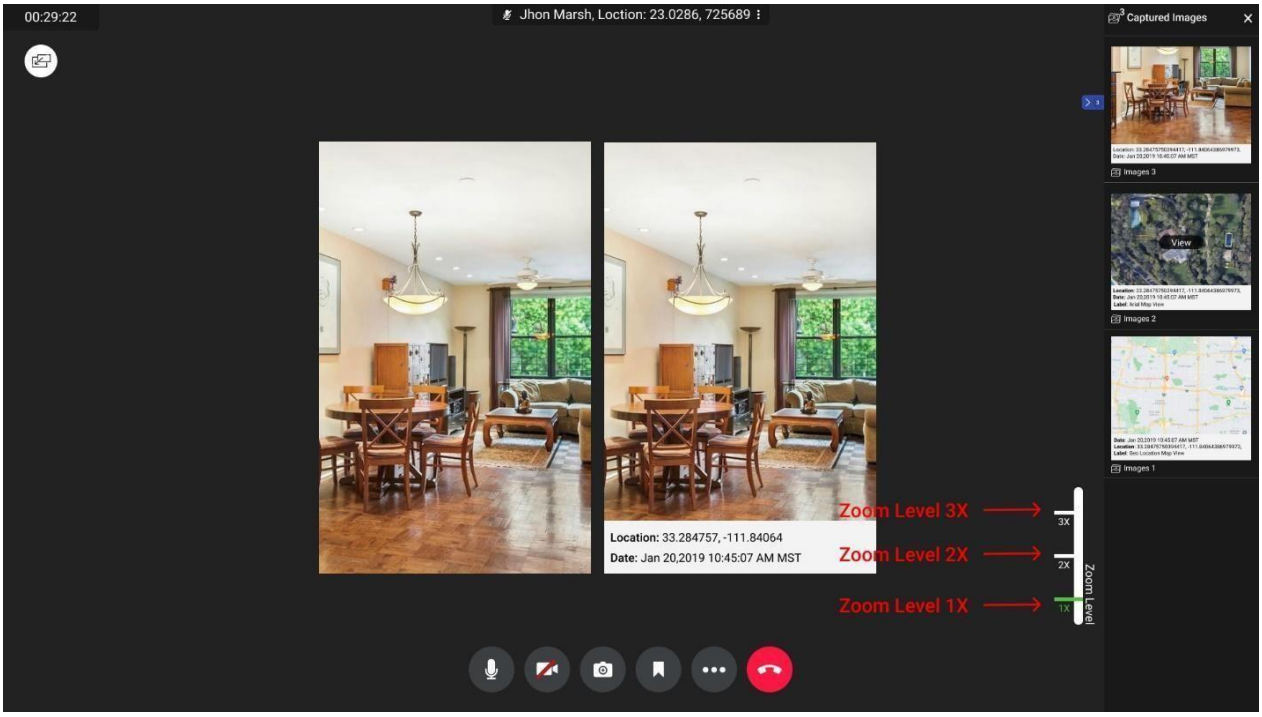
Note: The functions of the label and capturing images are available only when the screen is pinned. Otherwise the features will remain disabled.

Zoom the Screen for Close Inspection

If you need to take a closer look at any part of the property, you also have the capability to zoom-in on the screen. You can zoom in on the screen of any participant within the video call.

Pin the screen you want to zoom-in.

The moment you pin a particular screen, a three level zoom menu will appear on the screen.



Click on the zoom level as needed, and you can see the screen zoom in or out.

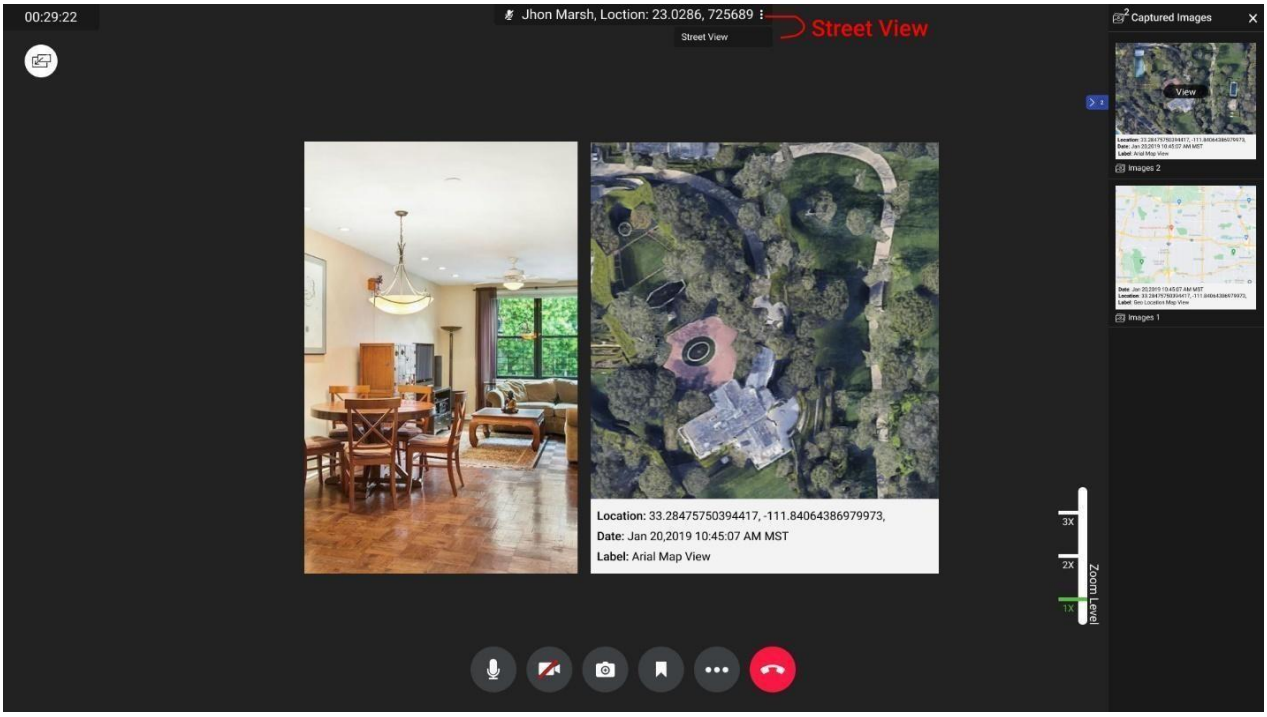
Street View

While inspecting the property, it is important not only to see the property but also to see the surrounding areas of the property. The convenient tool, ‘Street View’ gives you this capability.

Pin the participant’s screen.

To display a street view and to look at the surrounding area of a property, pin the screen of that particular participant of the video call in the upper left corner.

After a screen is pinned, click on the kebab menu (three horizontal lines) at the top of the screen and the ‘Street View’ will appear. Click on that button.

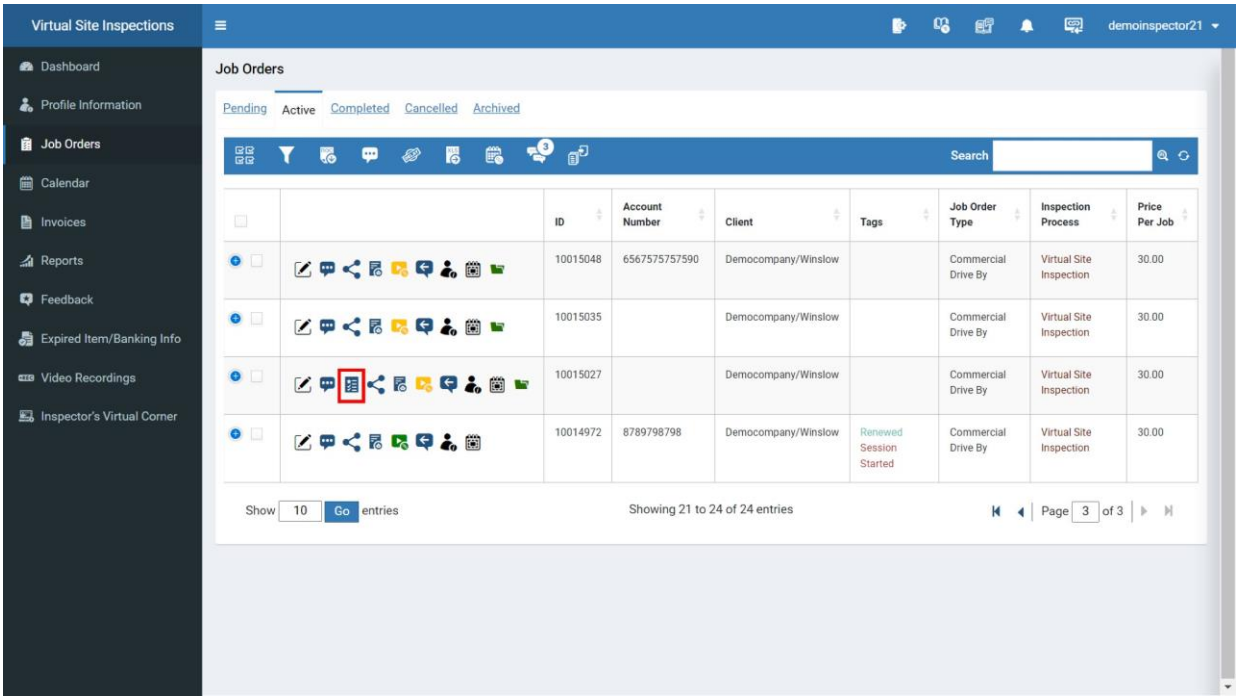


After clicking the ‘Street View’ button, a new window appears showing you the street view. You can now see the surrounding areas and scroll the screen as you need.

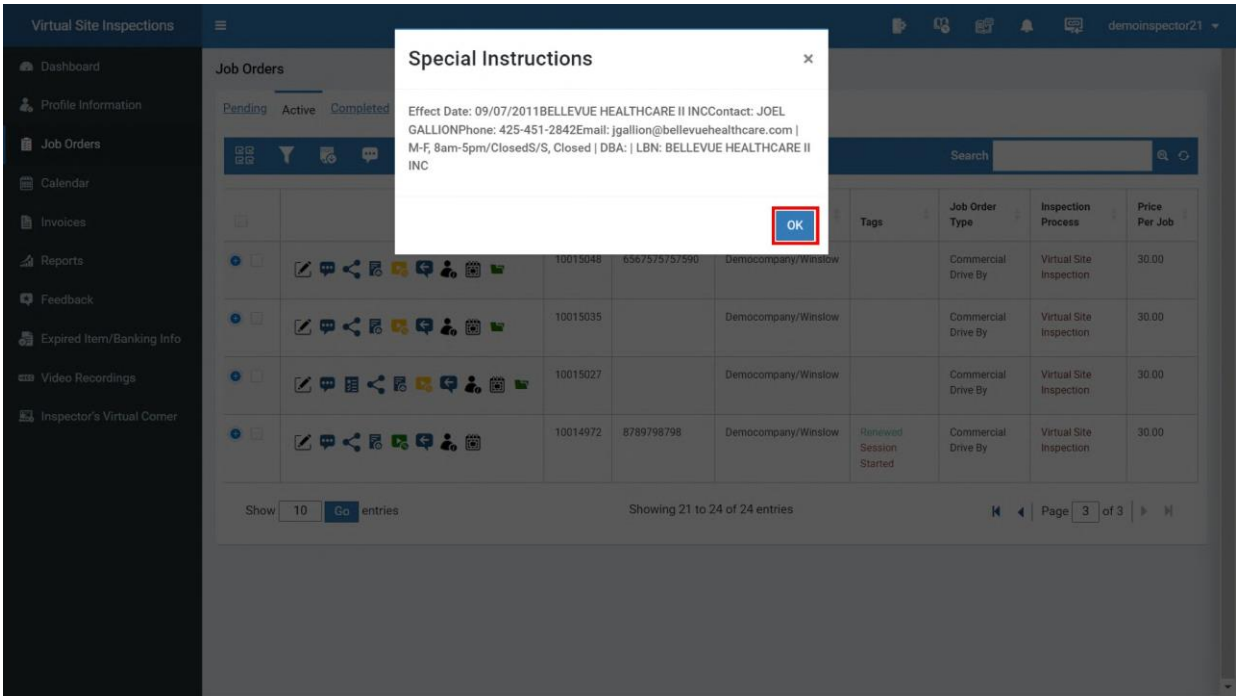
Special Instructions

Special instructions in a job order function as supplementary guidelines or specific details that must be adhered to when executing a task.

The "Special Instructions" icon is visible only when instructions are added to the job order. Otherwise, it will not be displayed, as illustrated in the provided screenshot.

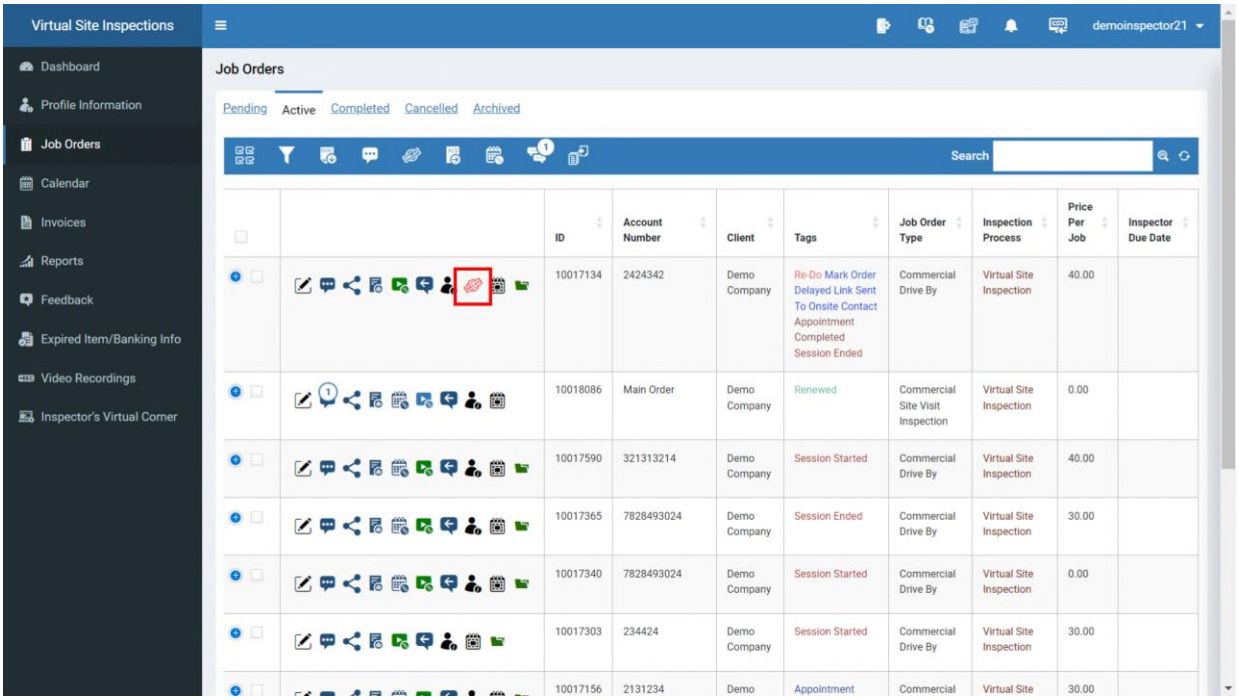


Upon clicking on the "Special Instructions" icon, a pop-up will appear containing guidelines or instructions. The pop-up includes an "OK" button; clicking on it will dismiss the pop-up.

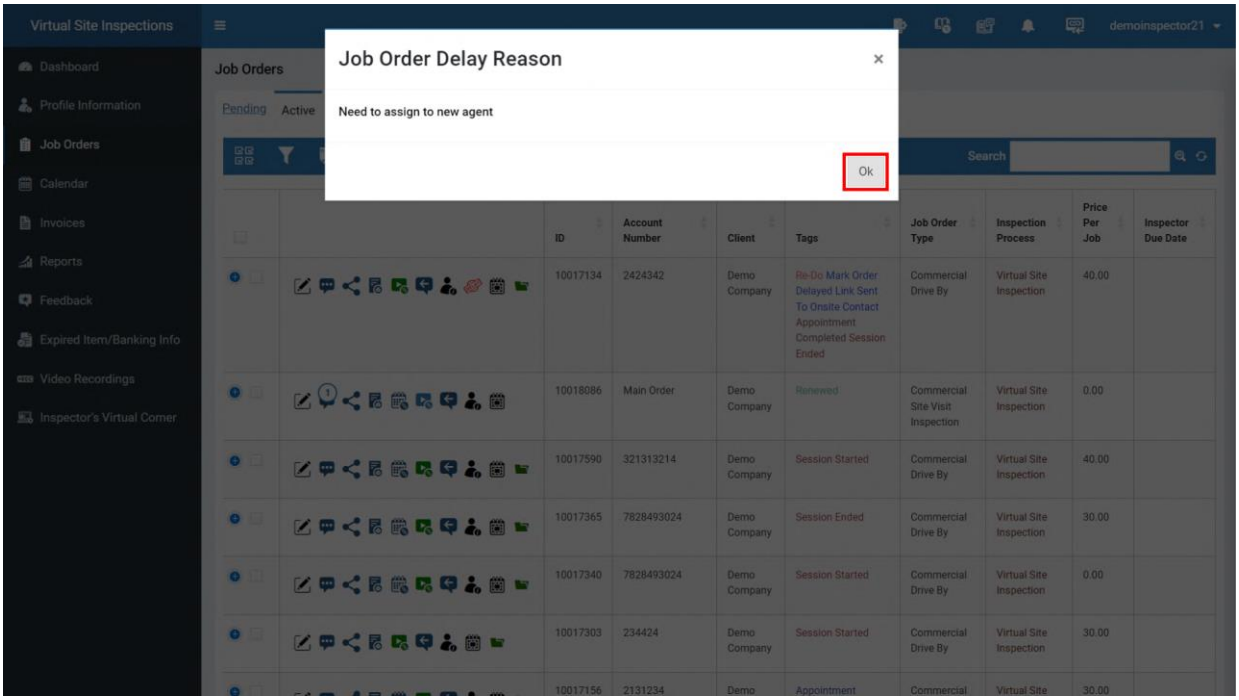


Delay reason

The Delay Reason icon exclusively displays job orders that have been marked as delayed, as elucidated in the previously explained "Mark as Delay" functionality.



Clicking on the Delay Reason icon triggers a popup box that reveals the specific delay reason. The box is equipped with an "OK" button, and upon clicking it, the dialog box is dismissed.

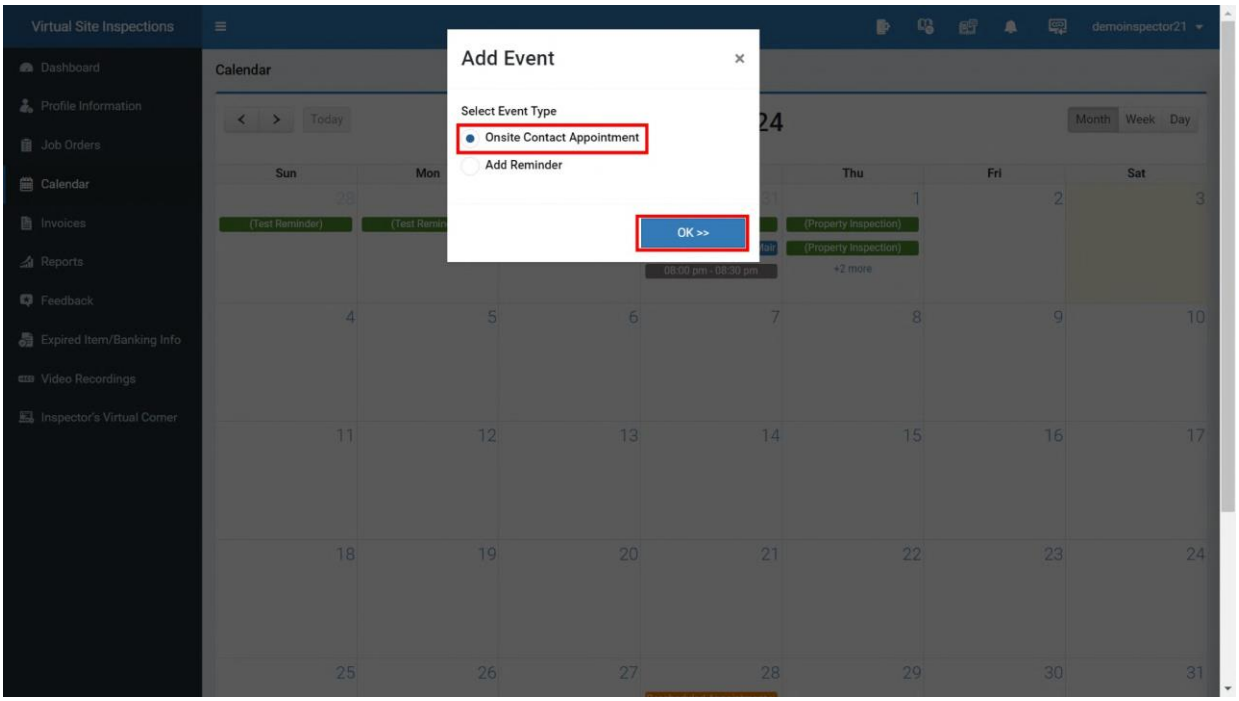


Calendar

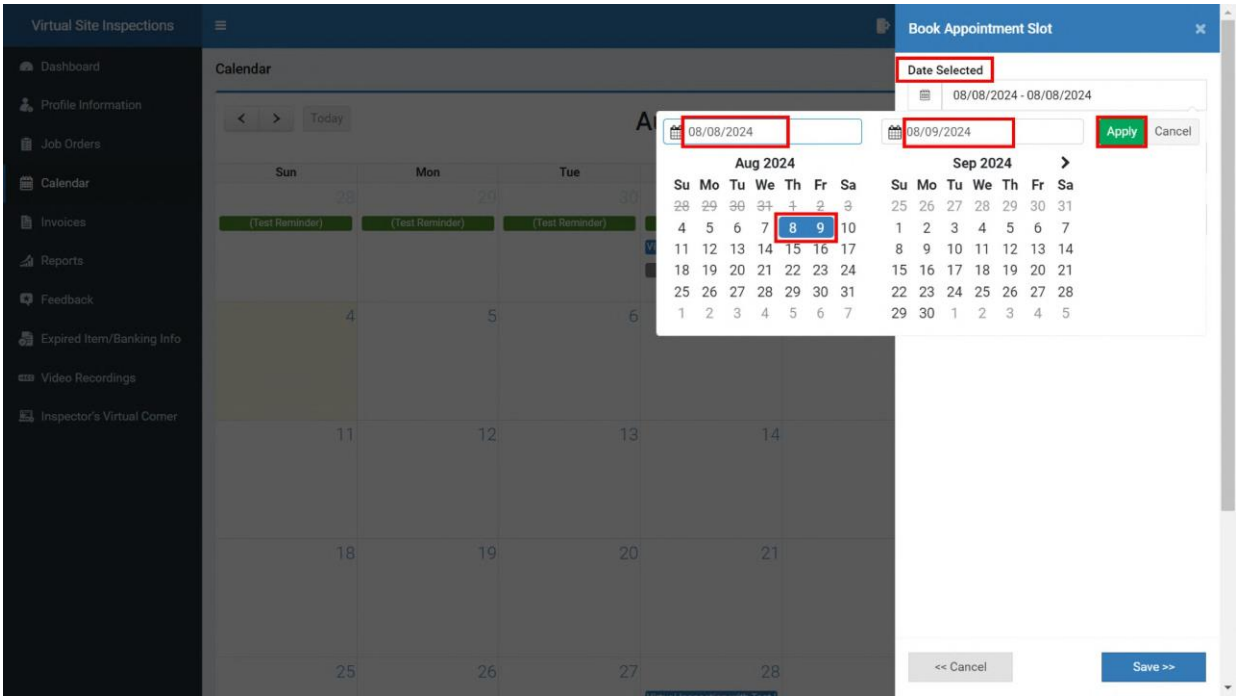
Once you have logged-in, click on the tab of Calendar from the left hand sidebar menu.Upon clicking on the Calendar button, a calendar opens.

Now, as an inspector, all you need to do is create available slots for appointments. Click on the date or day for which you want to create available appointment slots and a pop-up menu will appear with three options.

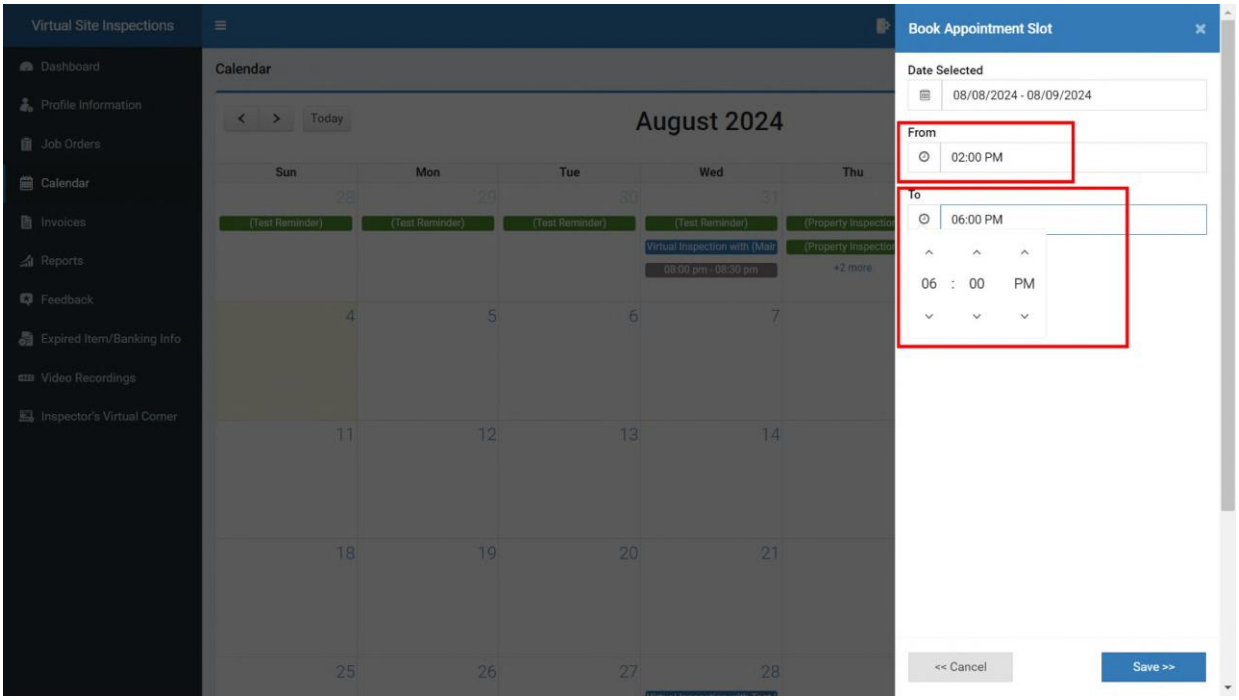
Select the first option of ‘Customer Appointment’ (this option would have been selected by default) and hit the button ‘OK’ as shown in the below image.



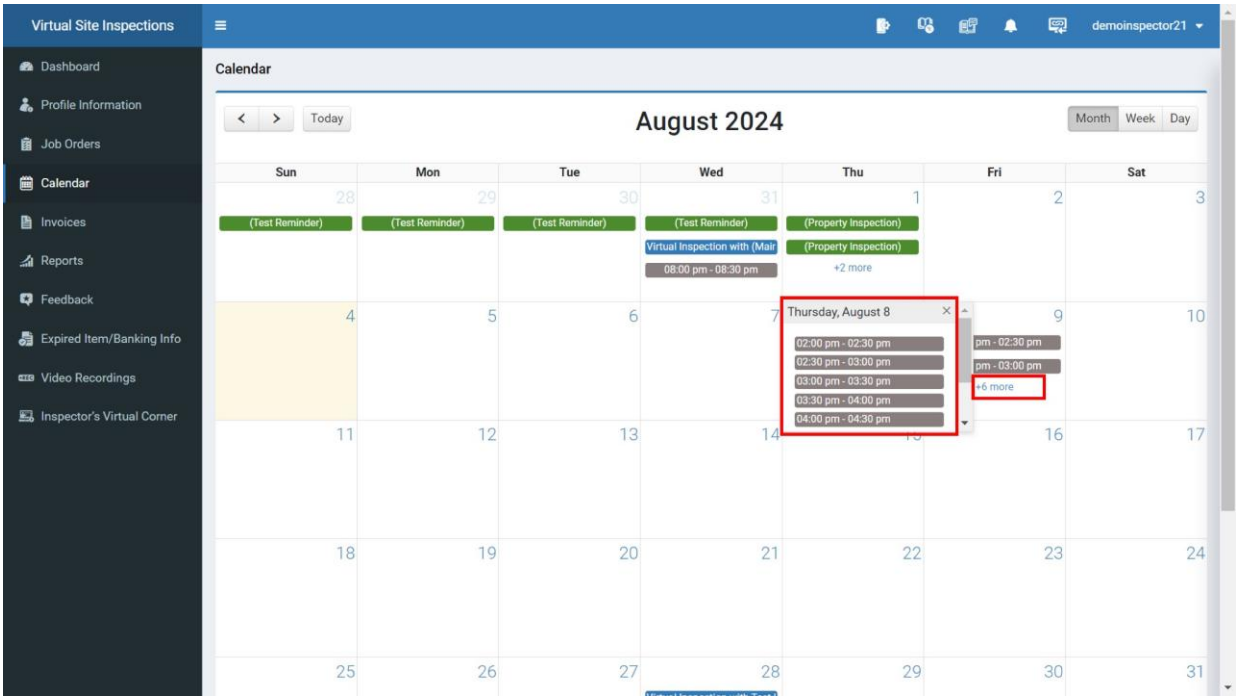
A sidebar menu will appear on the right-hand side. Here, click on the cell of ‘Date Selected’ and a pop-up calendar will appear. The current date would have been selected by default. However, you can select the date range as per your choice (a day or any number of days) and click the green button of ‘Apply’ and the date range will be stored.



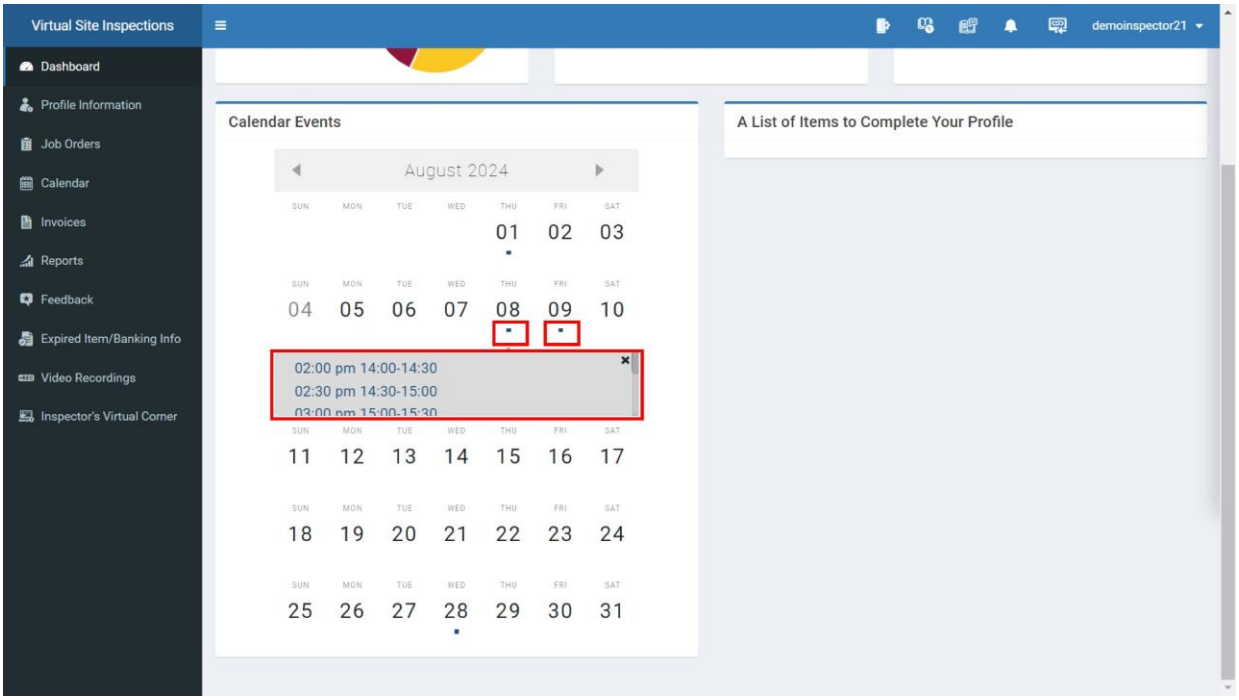
Now, select the time of the day when you are available for the virtual inspection. Select ‘From’ and ‘To’ as shown in the below image.



Now, click the button ‘Save’ and the system will add slots of 30 minutes each between the selected range of date and time as shown in the image below.



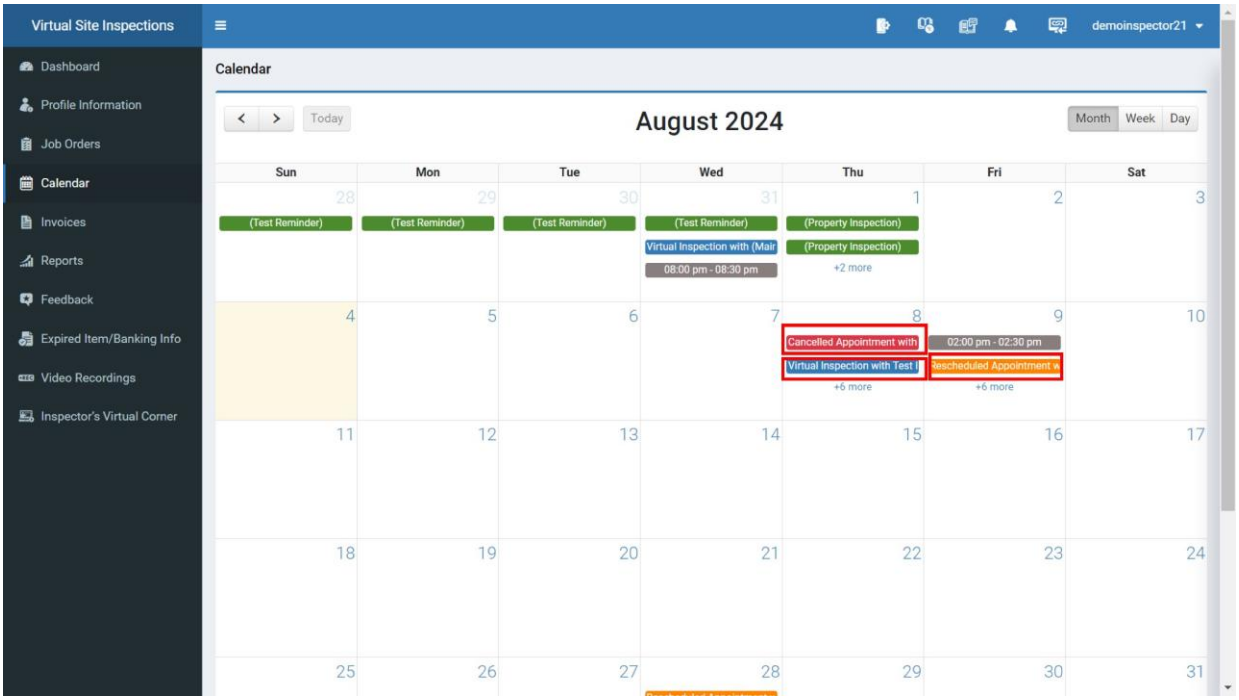
Once the slots are created, these slots highlighted with blue dots are visible to the inspector in the main calendar as well as the quick calendar available on the dashboard.



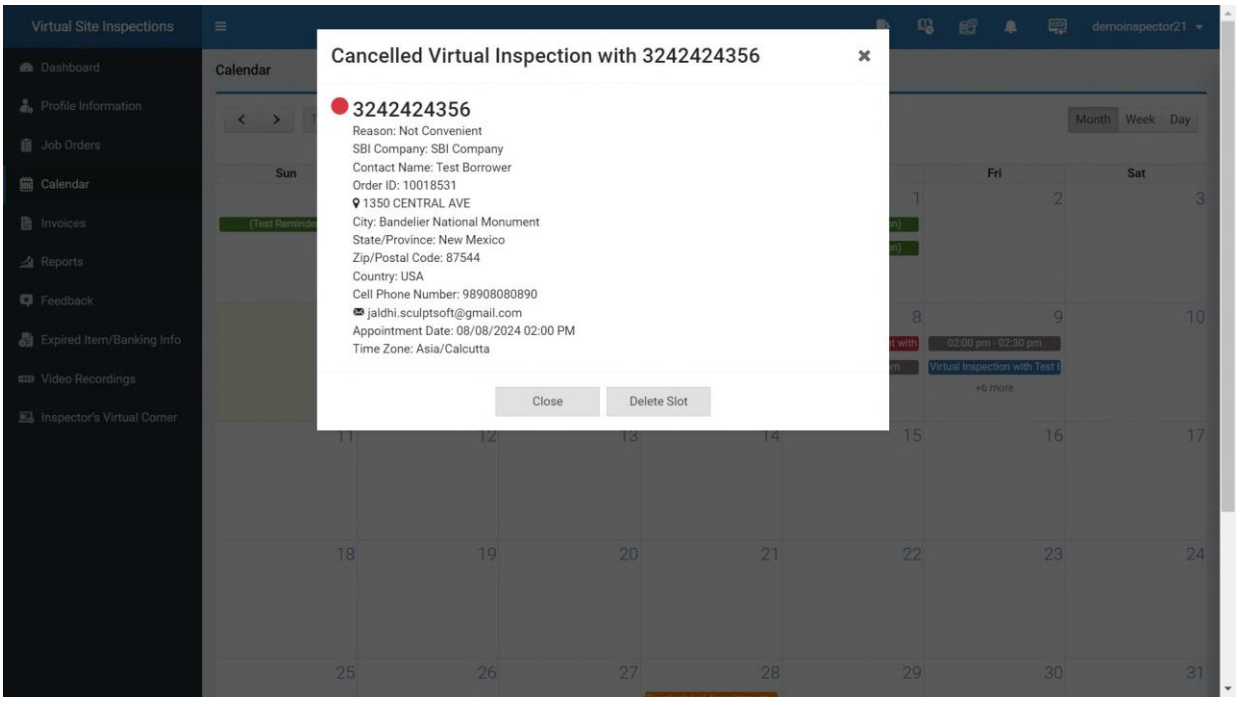
The available appointment slots will also reflect in the customer's portal highlighted with blue dots.

When an inspector sends an appointment link to a customer, the customer can book an appointment from any of the preferred slots.

Once an appointment is booked, the slot will turn blue. If the booked appointment is canceled, the slot will turn red. If the booked appointment is rescheduled, the slot will turn orange and if the particular job order is completed, the slot will turn green.



The inspector can see details of the booked, canceled and rescheduled slots by clicking on the particular slot.

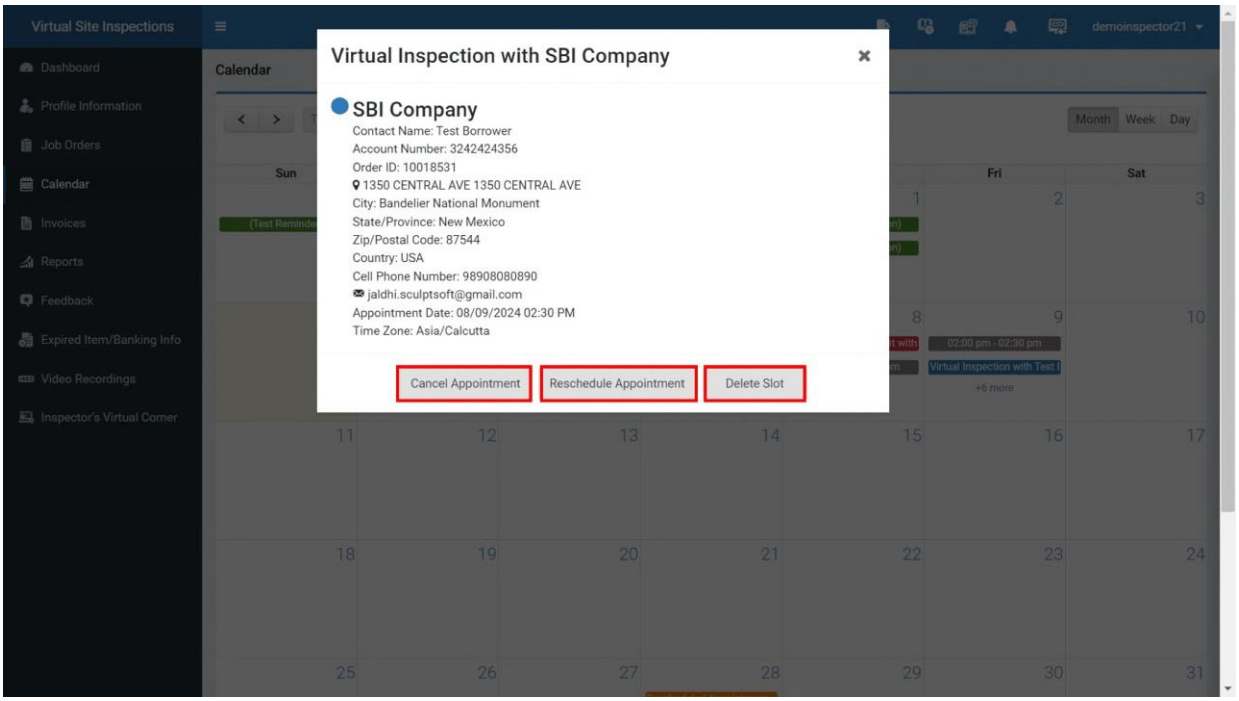


Reschedule and/or Canceled the Booked Appointments:

An inspector can cancel as well as reschedule the booked slots of appointments.

All you need to do is go to the calendar, click on the booked slot that you want to cancel and a pop menu with the options of ‘Cancel Appointment’ and ‘Reschedule Appointment’ will appear.

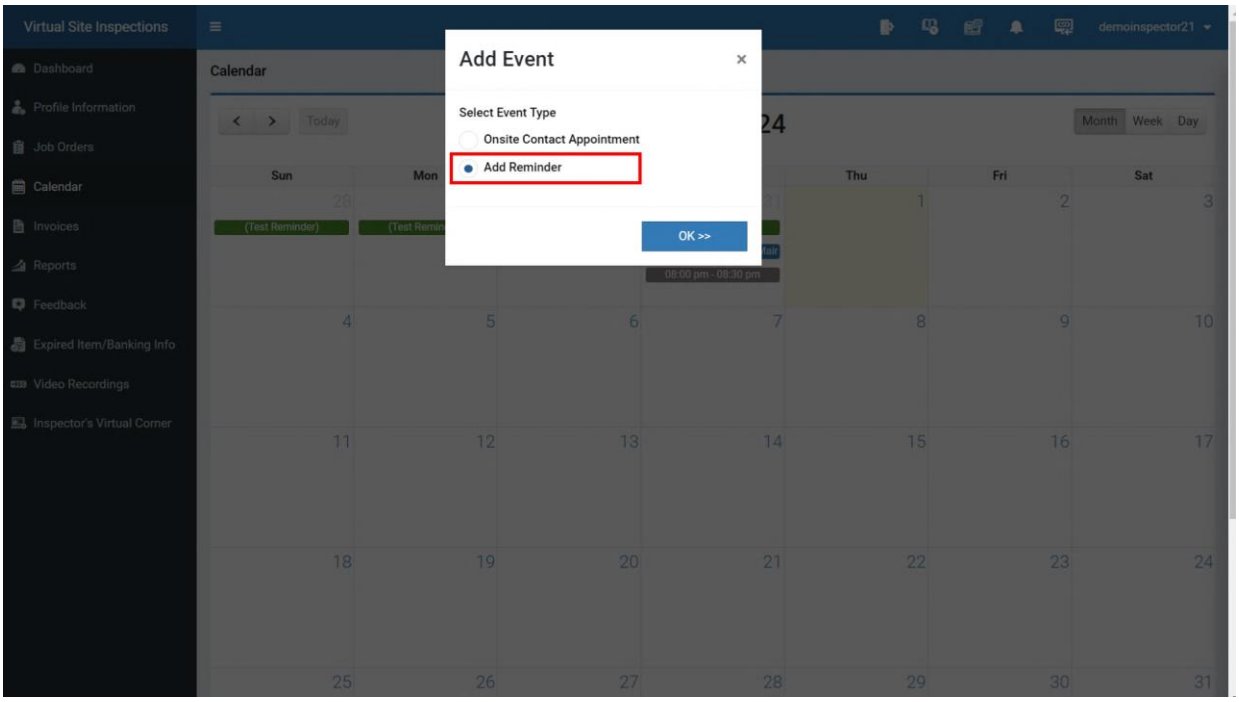
When you select any of the options, a pop-up bar will appear. There you need to provide a reason either for canceling an appointment or rescheduling an appointment. After providing an explanation save it and the booked slot will turn red if the appointment is canceled and the booked slot will turn orange if the appointment is rescheduled.



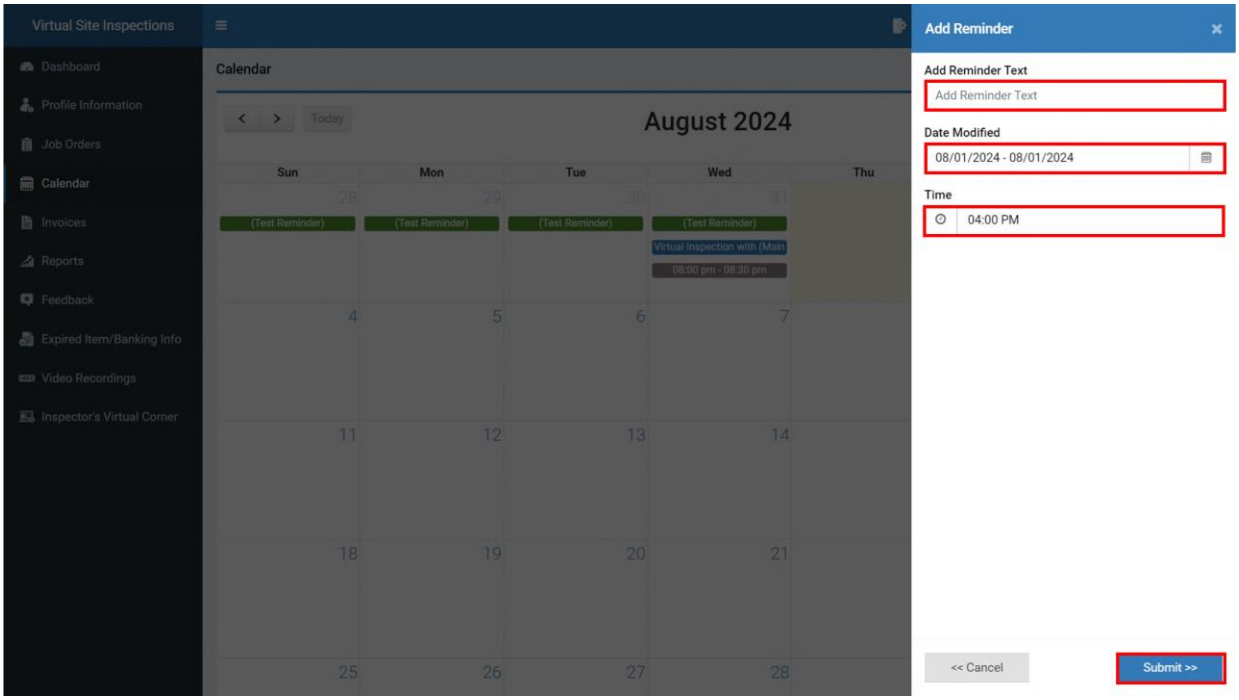
Once any booked slot is canceled or rescheduled, this particular slot will be available again to the customer for booking.

Once any job order is completed by the inspector, the appointment slots will turn green and no changes can be made in these slots as well as any of the calendar events.

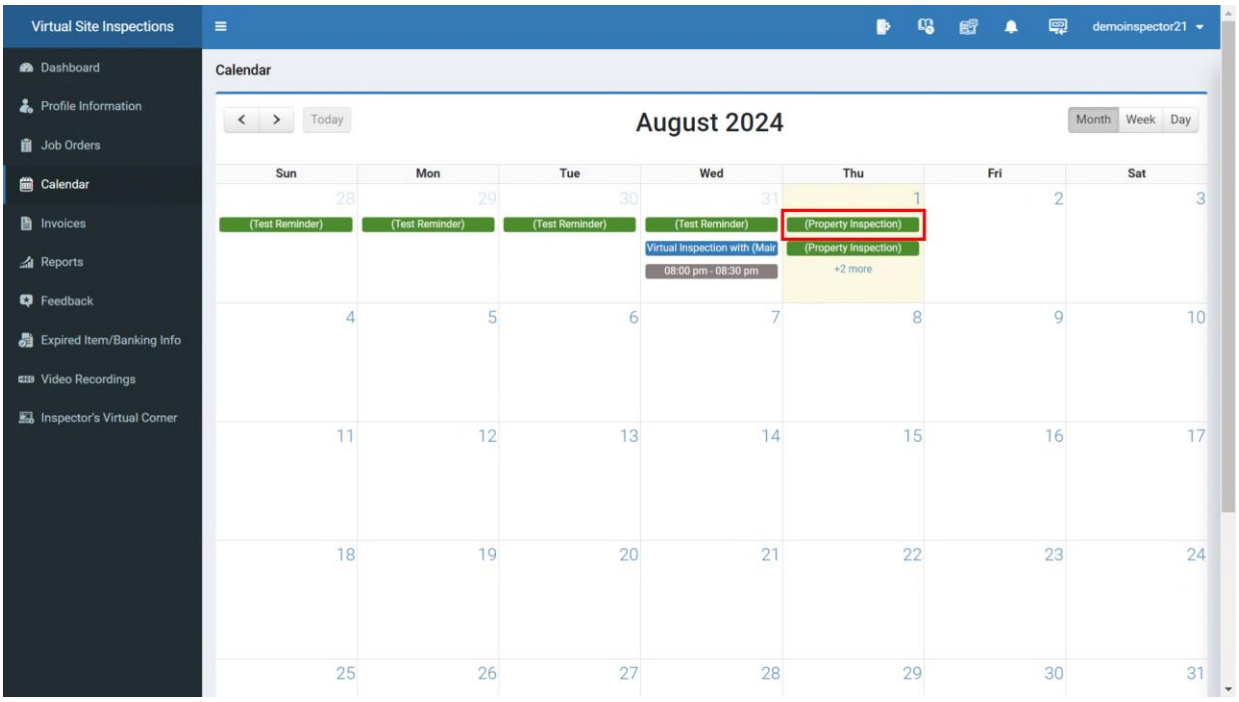
You can put in a reminder by clicking the "Reminder" option and then pressing "OK." Just remember, you can't add reminders for dates that have already passed. Check out the screenshot below for a visual guide.



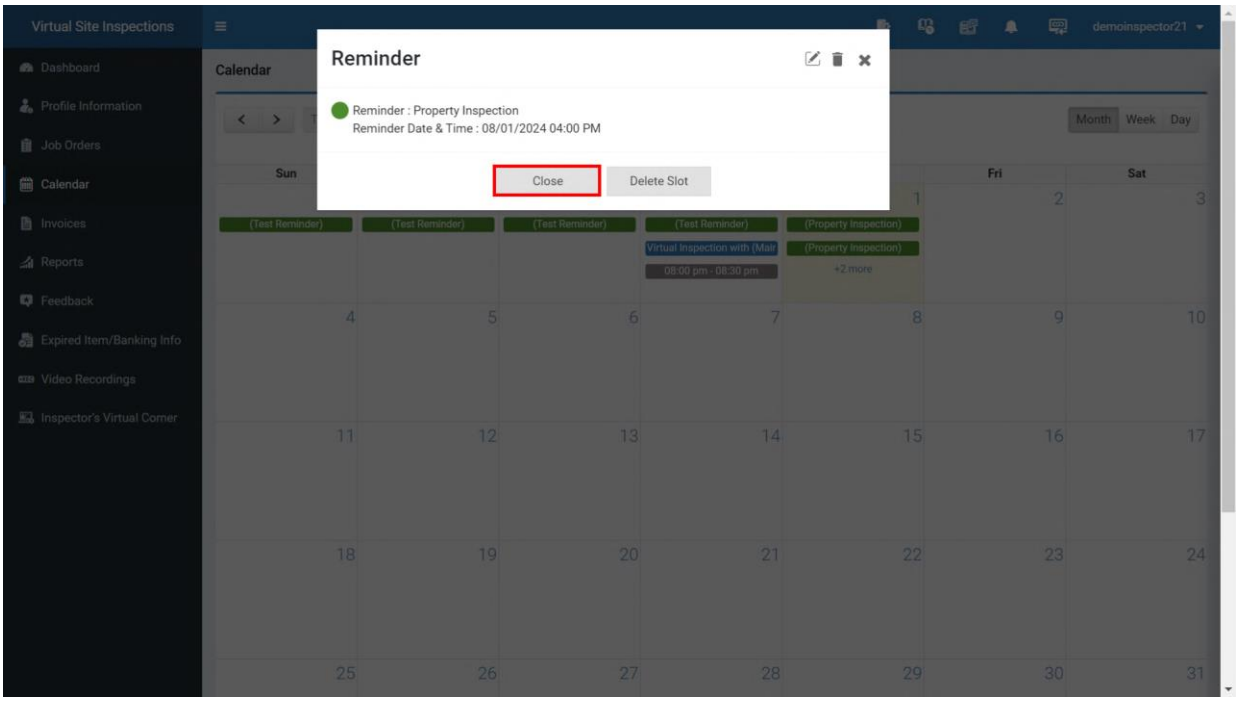
After clicking the "OK" button, a side model will open for adding a reminder. This model includes fields for Reminder Text, Date Modified, and Time. After filling in these fields, click on the "Submit" button to create a reminder for that date, as illustrated in the provided screenshot.



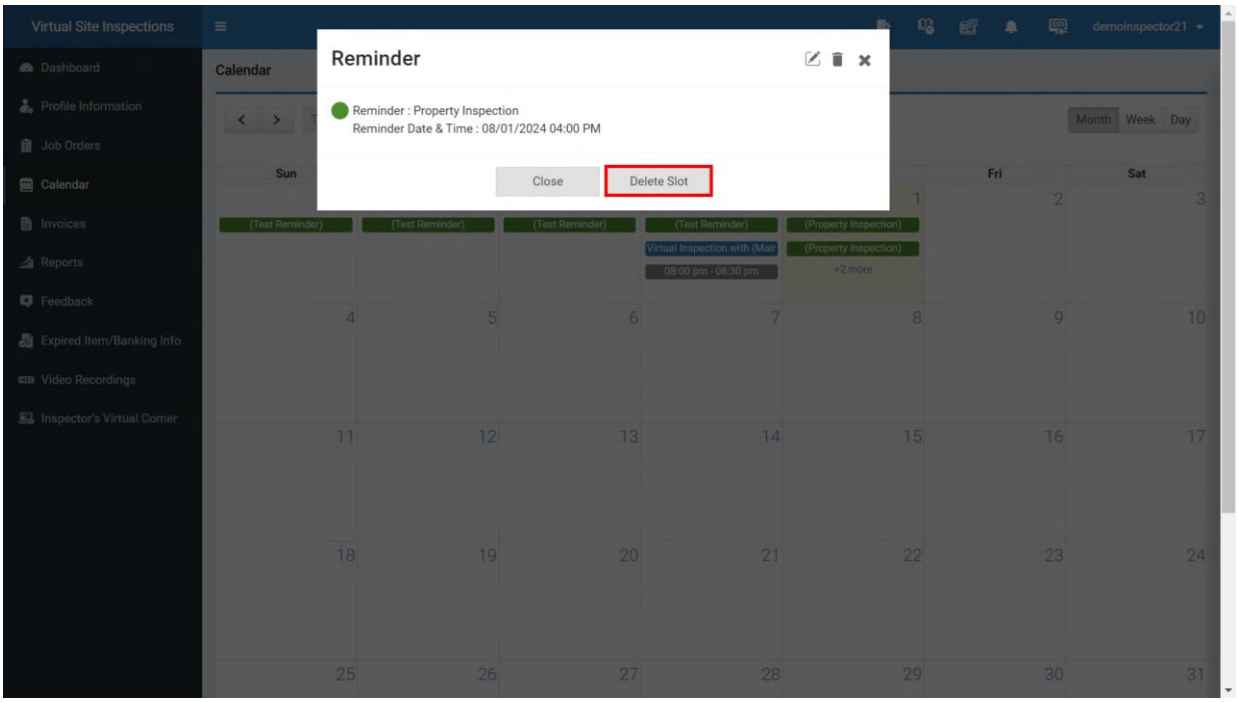
In the below screenshot, you can observe the reminder events scheduled for the respective date.



Clicking on the reminder text will open a pop-up displaying brief details, as shown in the screenshot below. The pop-up includes a "Close" button; clicking on it will close the pop-up.



Within the Reminder pop-up, there is an additional button labeled "Delete Slot." Clicking on this button will close the pop-up, and the reminder event will be deleted.

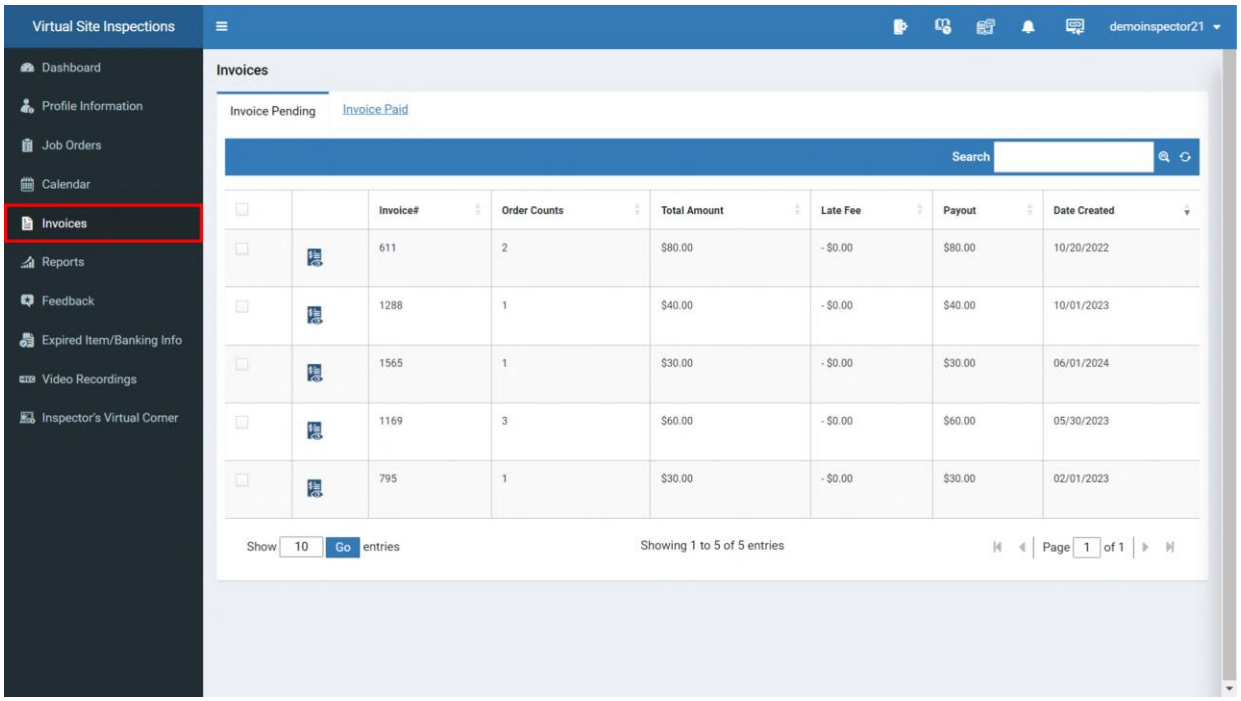


Invoices

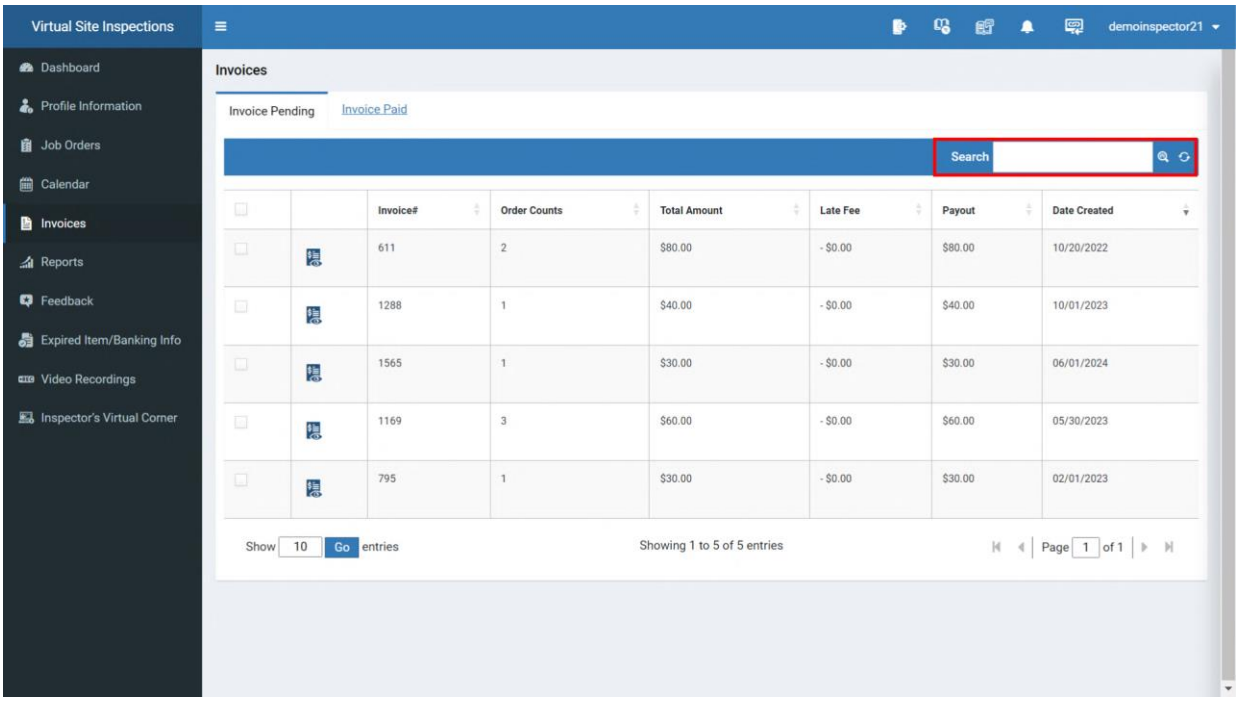
The Inspector can access their invoice details by selecting the 'Invoice' menu in the left-side panel, directing them to the Invoice page. Furthermore, they have the ability to download the invoice.

The Inspector can access their invoice details by selecting the 'Invoice' menu in the left-side panel, directing them to the Invoice page. Furthermore, they have the ability to download the invoice.

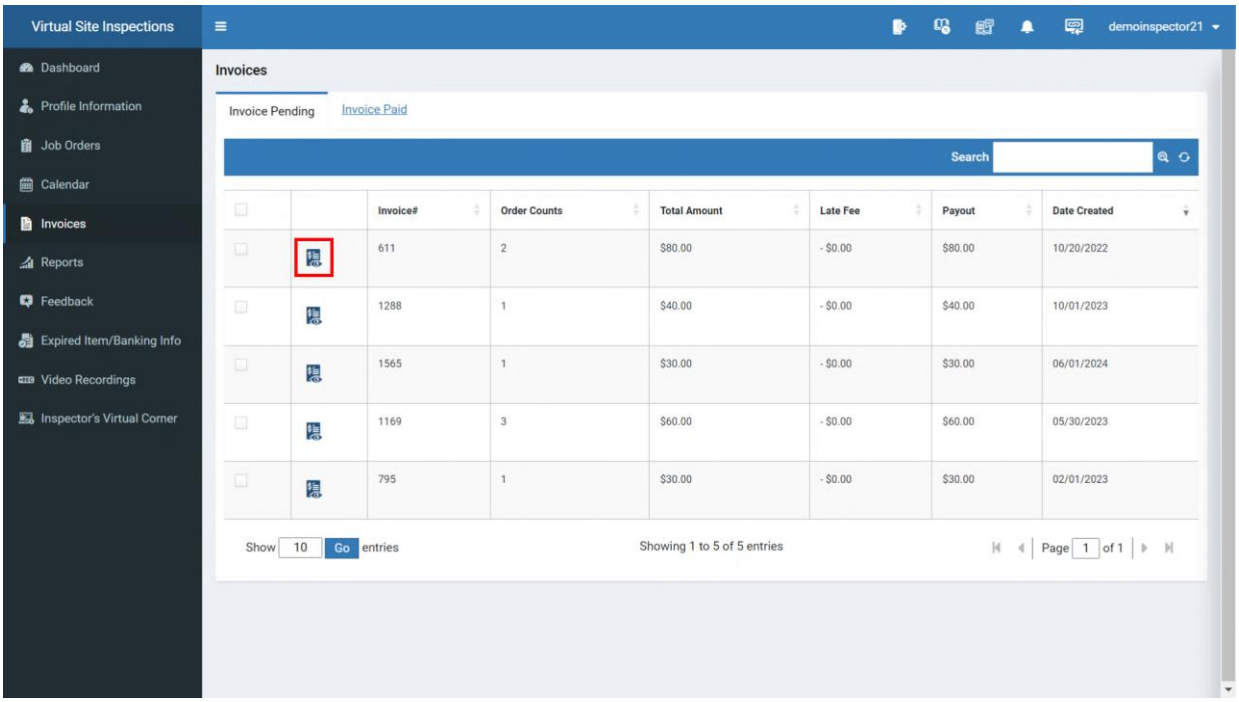
The Invoices page is organized into two tabs: "Invoice Pending" and "Invoice Paid". Within the "Invoice Pending" tab, a comprehensive list of unpaid invoices is displayed. Each entry in the list is accompanied by a preview icon, enabling users to inspect the details of a specific invoice. The information presented for each entry includes the invoice number, payout details, date of creation, order count, and late fee, as illustrated in the screenshot below.



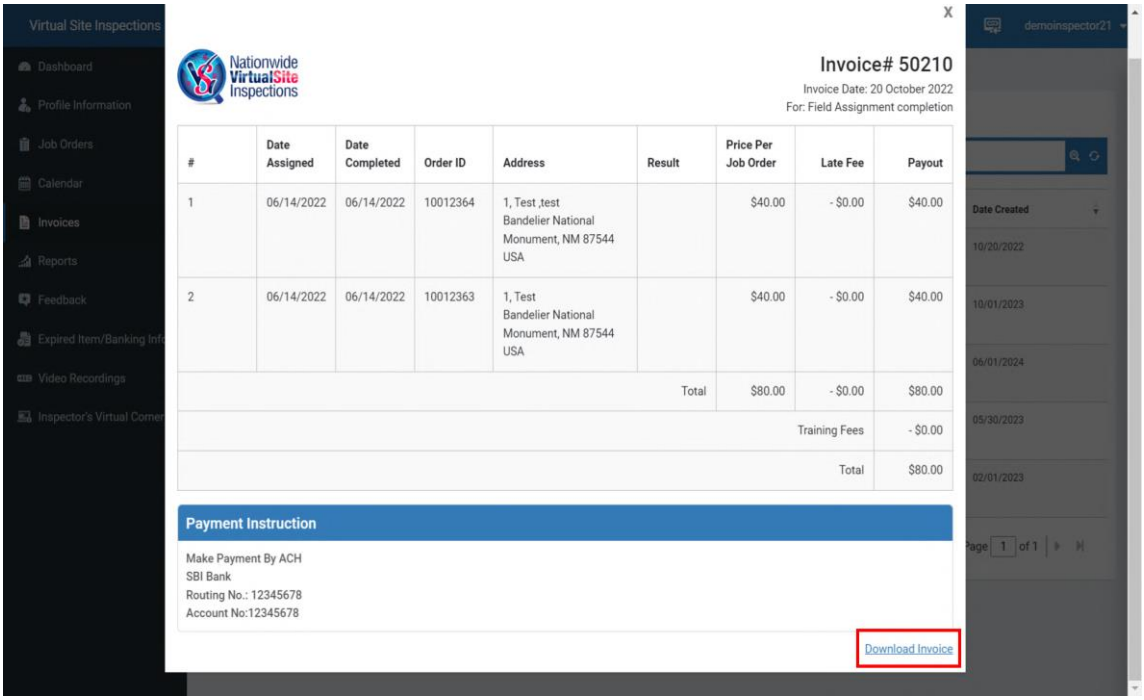
To search for an invoice using a keyword, the system conducts the search specifically based on the invoice number. Enter your search term in the highlighted search field, as depicted in the provided screenshots, and press enter or click on the finder icon next to the text field. Subsequently, the system will display a list of relevant invoices corresponding to the specified search criteria.



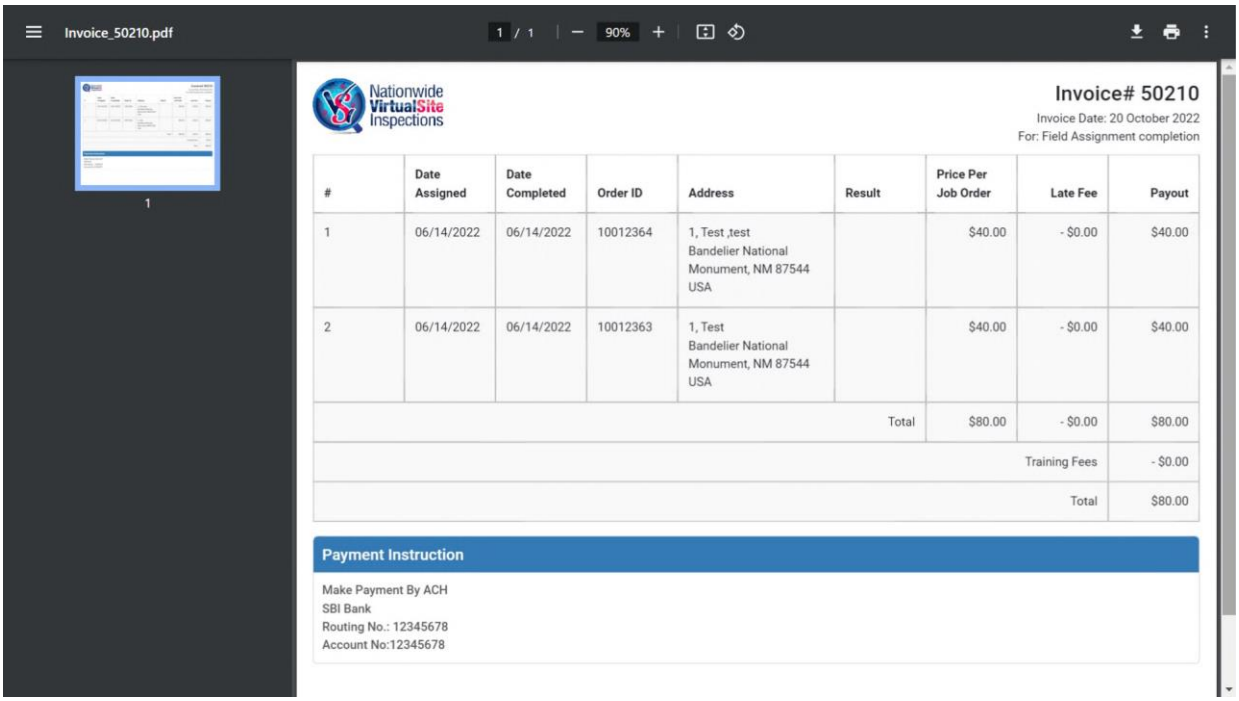
To view the details of an invoice, click on the "Preview Invoice" icon, as demonstrated in the screenshot below.



After clicking on the "Preview Invoice" icon, a pop-up will open, allowing you to see detailed information about the invoice. Additionally, you can download the invoice by clicking on the highlighted link "Download Invoice" as shown in the screenshot below.



After clicking on the "Download Invoice" link, the invoice PDF file will be downloaded to your system. You can preview the content of the PDF file, as shown in the screenshot provided below.



Invoice_50210.pdf

Nationwide VirtualSite Inspections

Invoice# 50210

Invoice Date: 20 October 2022

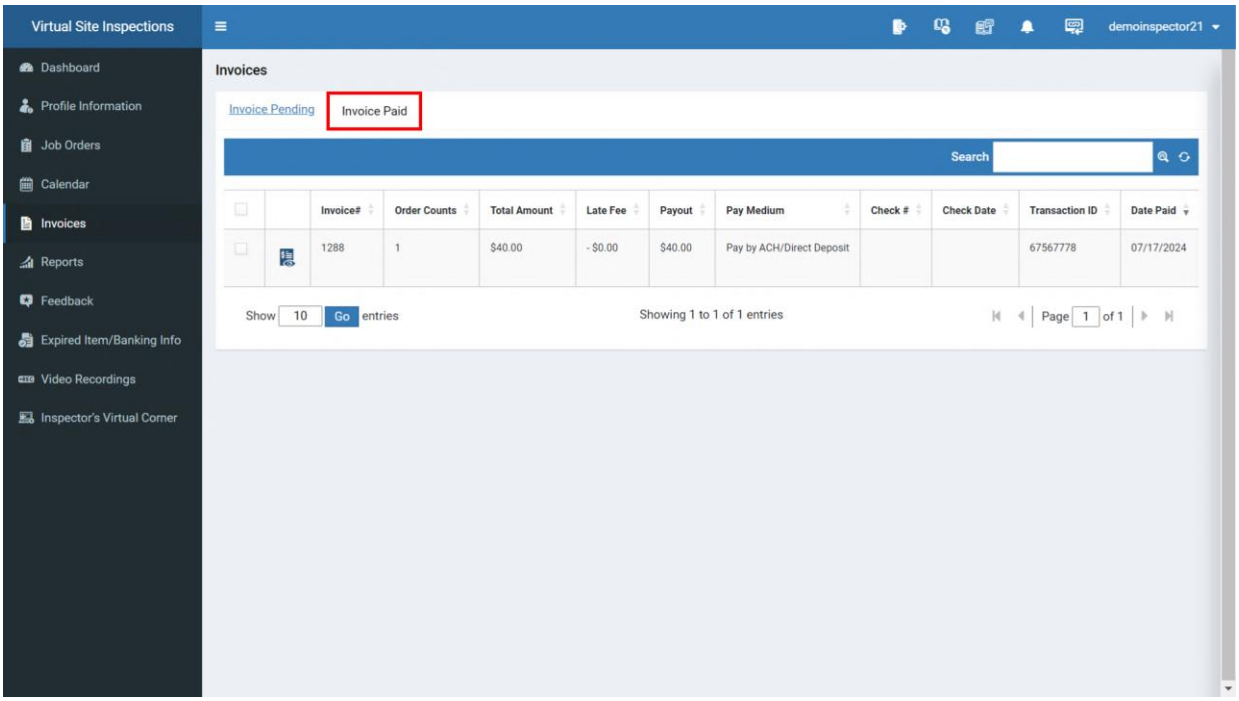
For: Field Assignment completion

#	Date Assigned	Date Completed	Order ID	Address	Result	Price Per Job Order	Late Fee	Payout
1	06/14/2022	06/14/2022	10012364	1, Test ,test Bandelier National Monument, NM 87544 USA		$40.00	- $0.00	$40.00
2	06/14/2022	06/14/2022	10012363	1, Test Bandelier National Monument, NM 87544 USA		$40.00	- $0.00	$40.00
					Total	$80.00	- $0.00	$80.00
							Training Fees	- $0.00
							Total	$80.00

Payment Instruction

Make Payment By ACH
SBI Bank
Routing No.: 12345678
Account No:12345678

Clicking on the "Invoice Paid" tab, you can access a list of all paid invoices. Each entry in the list includes a preview icon, enabling you to examine the details of a specific invoice. The provided information encompasses the invoice number, order count, total amount, late fee, payout, payment medium, check number, check date, transaction ID, and date paid, as depicted in the picture below.



Virtual Site Inspections

demoinspector21

Dashboard
Profile Information
Job Orders
Calendar
Invoices
Reports
Feedback
Expired Item/Banking Info
Video Recordings
Inspector's Virtual Corner

Invoices

Invoice Pending | Invoice Paid

Search

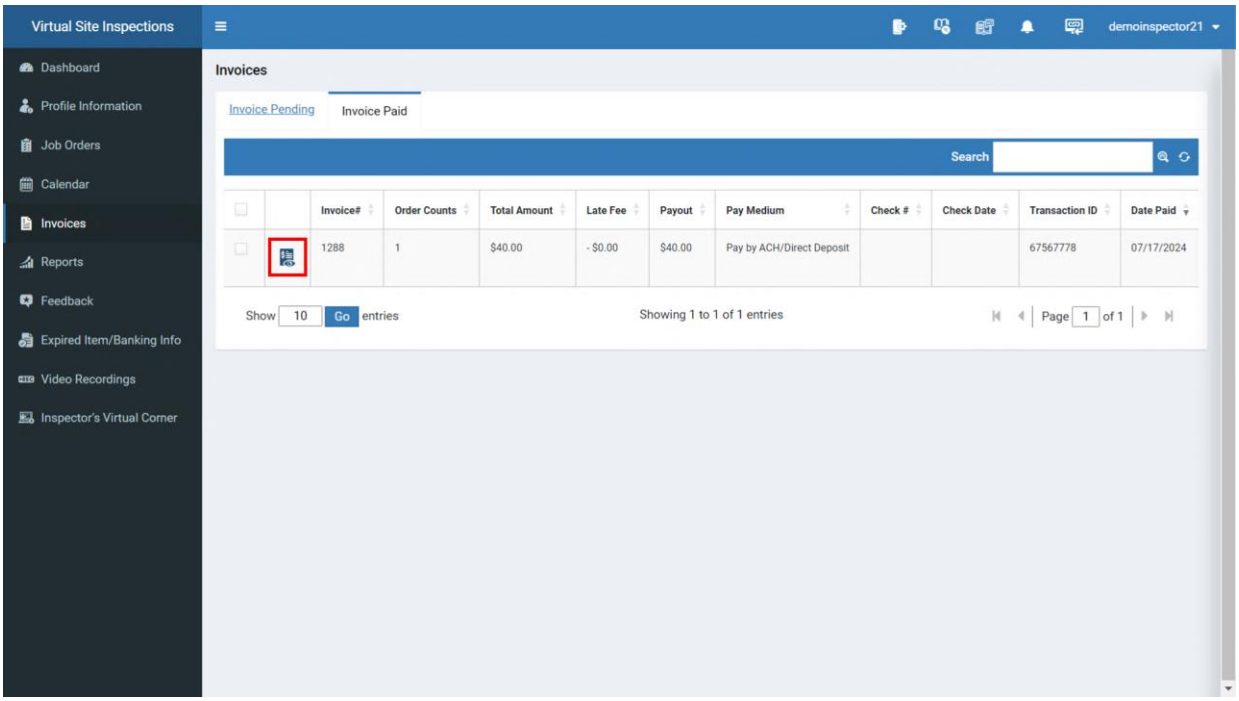
Invoice#	Order Counts	Total Amount	Late Fee	Payout	Pay Medium	Check #	Check Date	Transaction ID	Date Paid
1288	1	$40.00	- $0.00	$40.00	Pay by ACH/Direct Deposit			67567778	07/17/2024

Show 10 Go entries

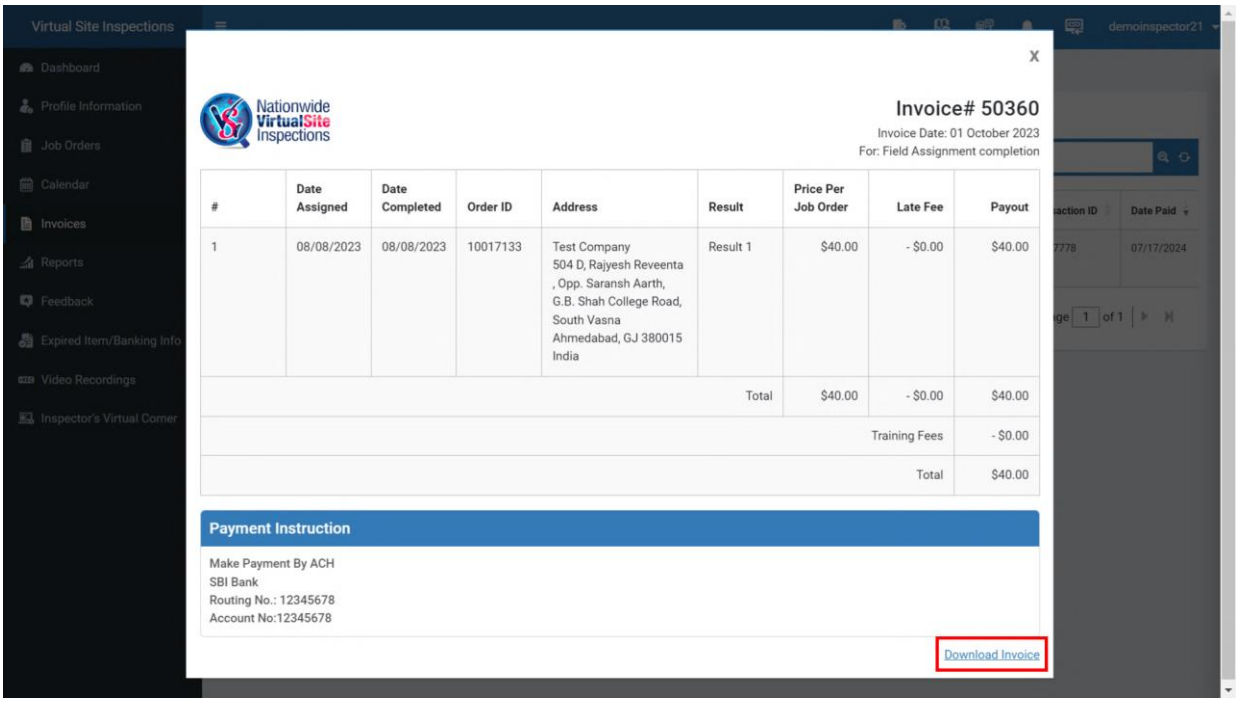
Showing 1 to 1 of 1 entries

Page 1 of 1

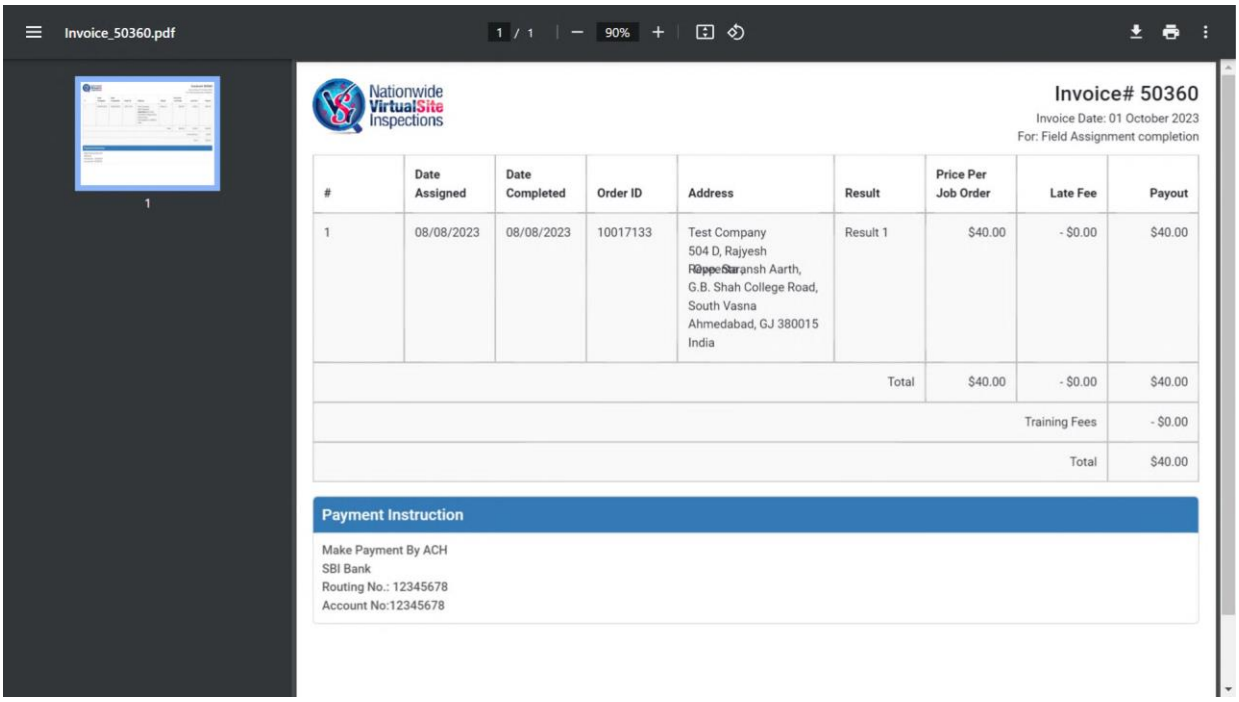
To view the details of an invoice, click on the "Preview Invoice" icon, as demonstrated in the screenshot below.



After clicking on the "Preview Invoice" icon, a pop-up will open, allowing you to see detailed information about the invoice. Additionally, you can download the invoice by clicking on the highlighted link "Download Invoice" as shown in the screenshot below.



After clicking on the "Download Invoice" link, the invoice PDF file will be downloaded to your system. You can preview the content of the PDF file, as shown in the screenshot provided below.



Invoice_50360.pdf

Nationwide VirtualSite Inspections

Invoice# 50360

Invoice Date: 01 October 2023
For: Field Assignment completion

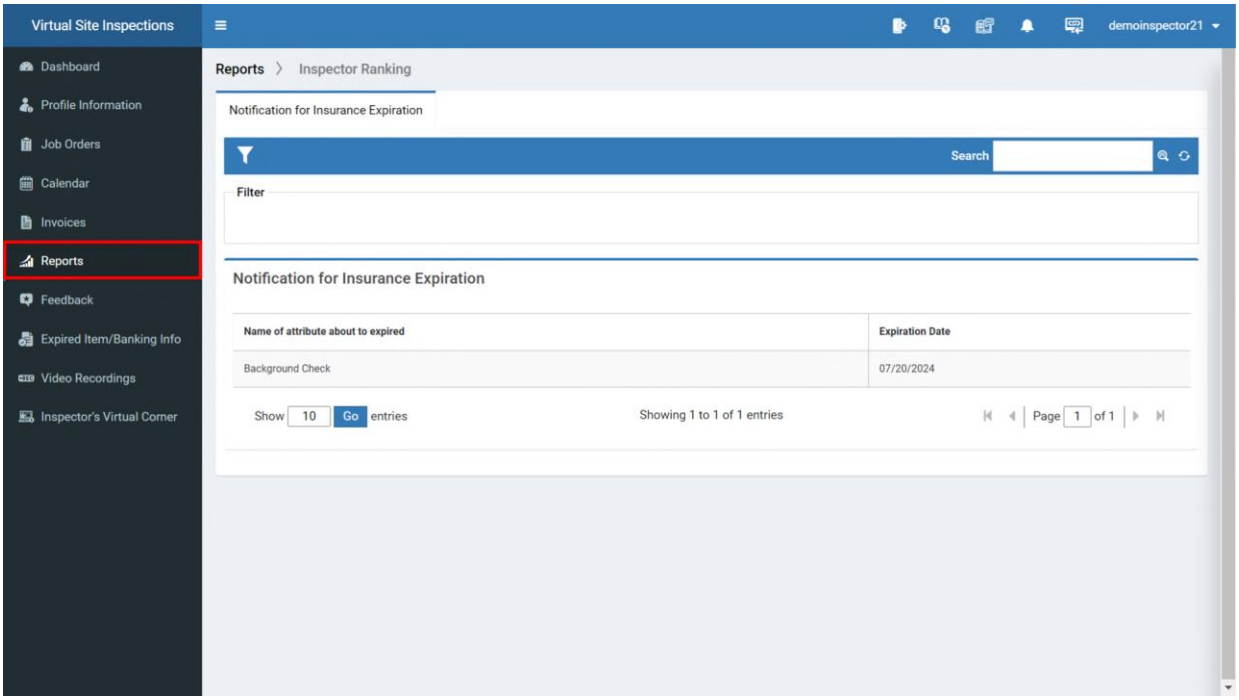
#	Date Assigned	Date Completed	Order ID	Address	Result	Price Per Job Order	Late Fee	Payout
1	08/08/2023	08/08/2023	10017133	Test Company 504 D, Rajyesh Ropes Saransh Aarth, G.B. Shah College Road, South Vasna Ahmedabad, GJ 380015 India	Result 1	$40.00	- $0.00	$40.00
					Total	$40.00	- $0.00	$40.00
							Training Fees	- $0.00
							Total	$40.00

Payment Instruction

Make Payment By ACH
SBI Bank
Routing No.: 12345678
Account No:12345678

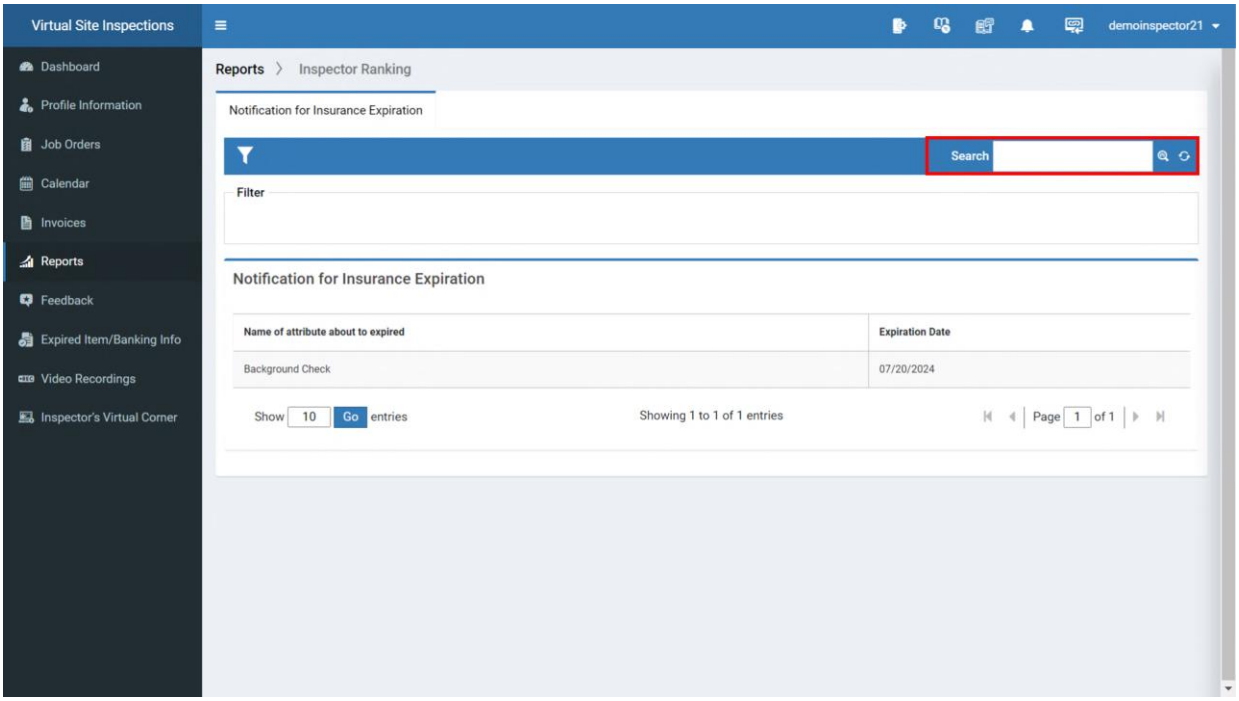
Reports

The 'Reports' feature serves the purpose of showing pre-defined notifications indicating the expiration of your items & documents such as Background Check Document.

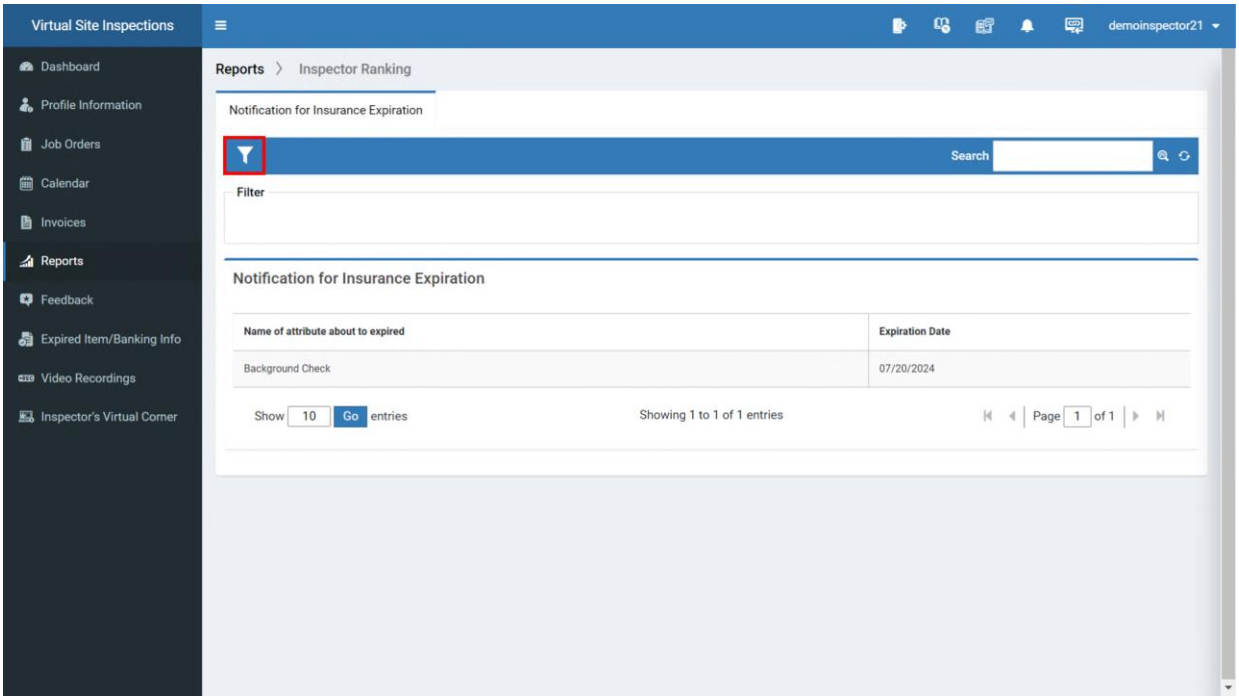


To search for notifications regarding insurance expiration using a keyword, the system conducts the search based on parameters such as the name of the attribute about to expire. Enter your search term in the highlighted search field, as demonstrated in the provided screenshots, and then press enter or

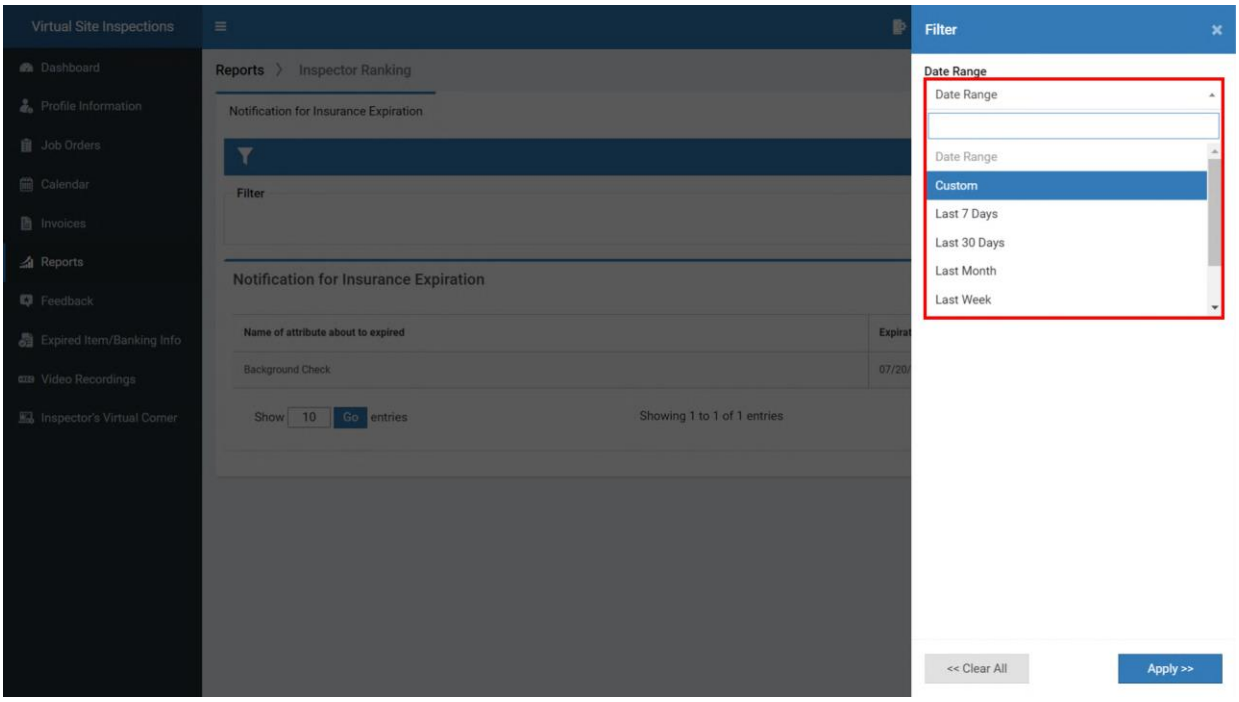
click on the finder icon next to the text field. Subsequently, the system will display a list of relevant notification records for insurance expiration information corresponding to the specified search criteria.



The 'Insurance Expiration' notification tab displays all upcoming expired items & which are already expired. Additionally, users can apply filters by clicking on the filter icon.

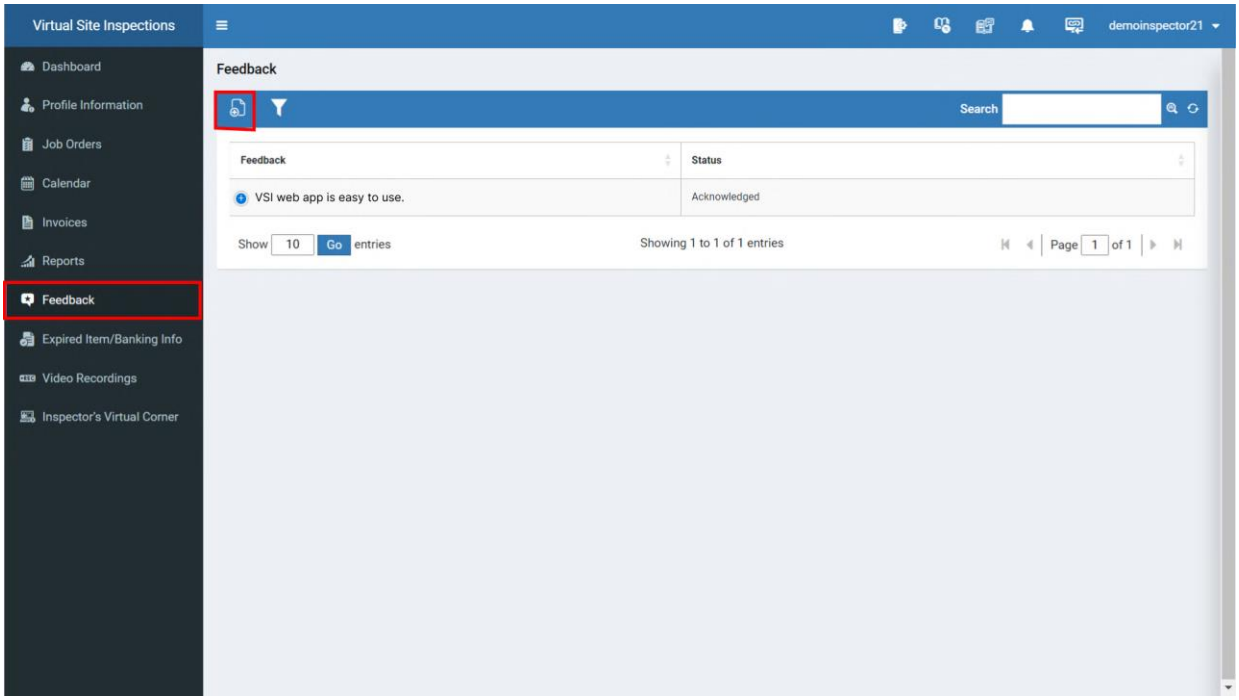


When the filter icon is clicked, a side modal opens, allowing users to apply filters based on specific range and days. Users can select values from the dropdown menu and click the 'Apply' button, resulting in the display of filtered data in the list.



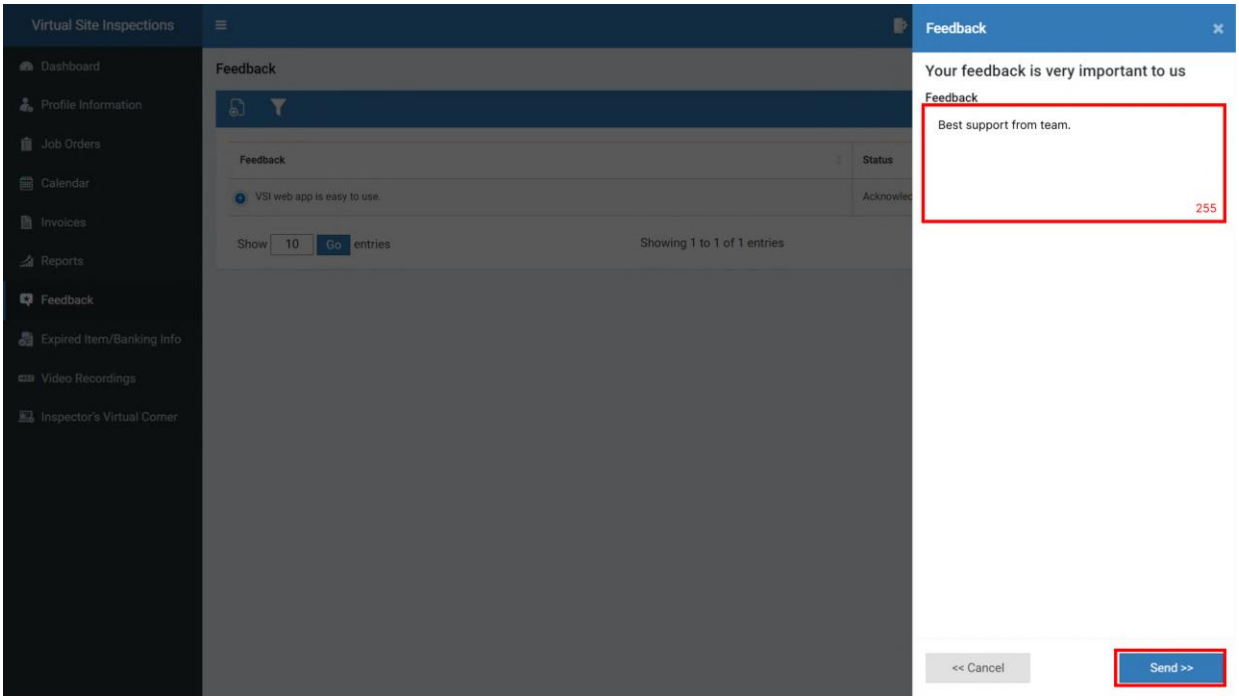
Feedback

Inspector can provide feedback by clicking on the 'Feedback' menu located in the left-side panel of the Inspector, which then redirects them to the feedback page.

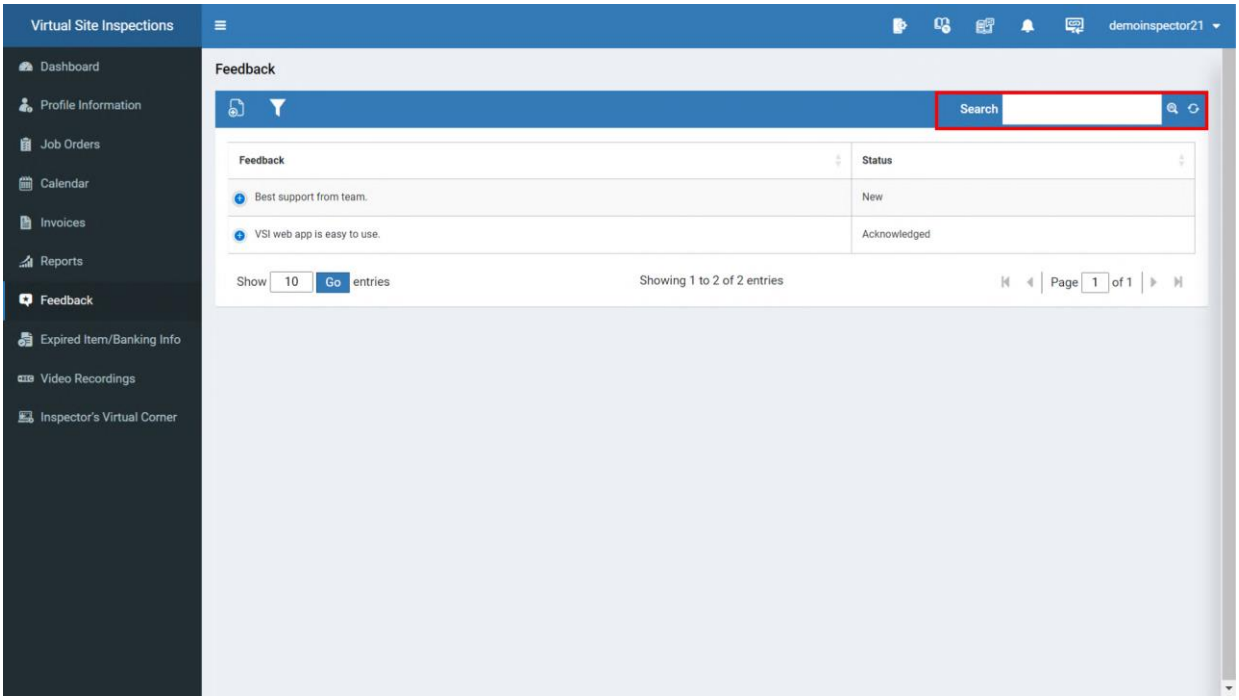


On the feedback page, a blue header bar is present. By clicking on the "Add New" icon within this header, a side modal opens, enabling users to submit feedback to the admin, as illustrated in the accompanying screenshot below.

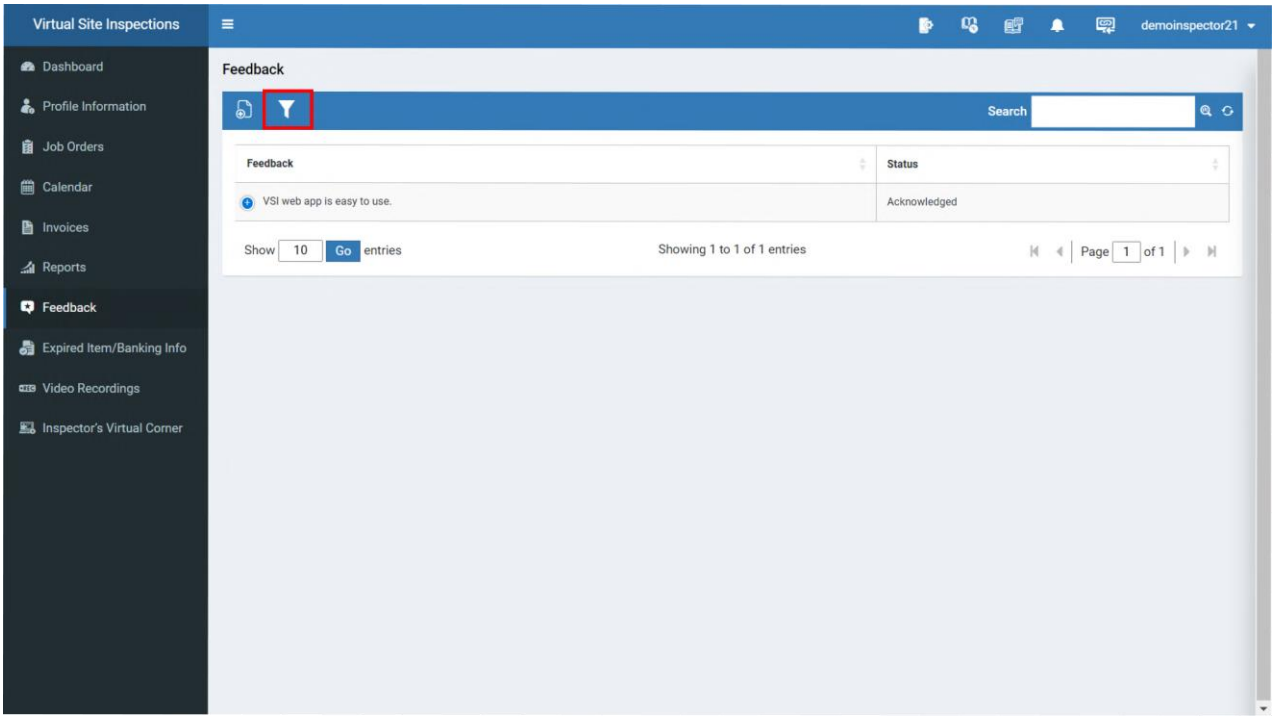
Users can input their feedback in the feedback text box, with a maximum character limit of 255. After entering their feedback, users can click on the "Send" button. Subsequently, the side modal will close, and the feedback is sent to the admin. The user's feedback is then displayed in the feedback list with a new status. The admin has the ability to reply to the feedback, and the status can be changed from 'new' to 'acknowledged.



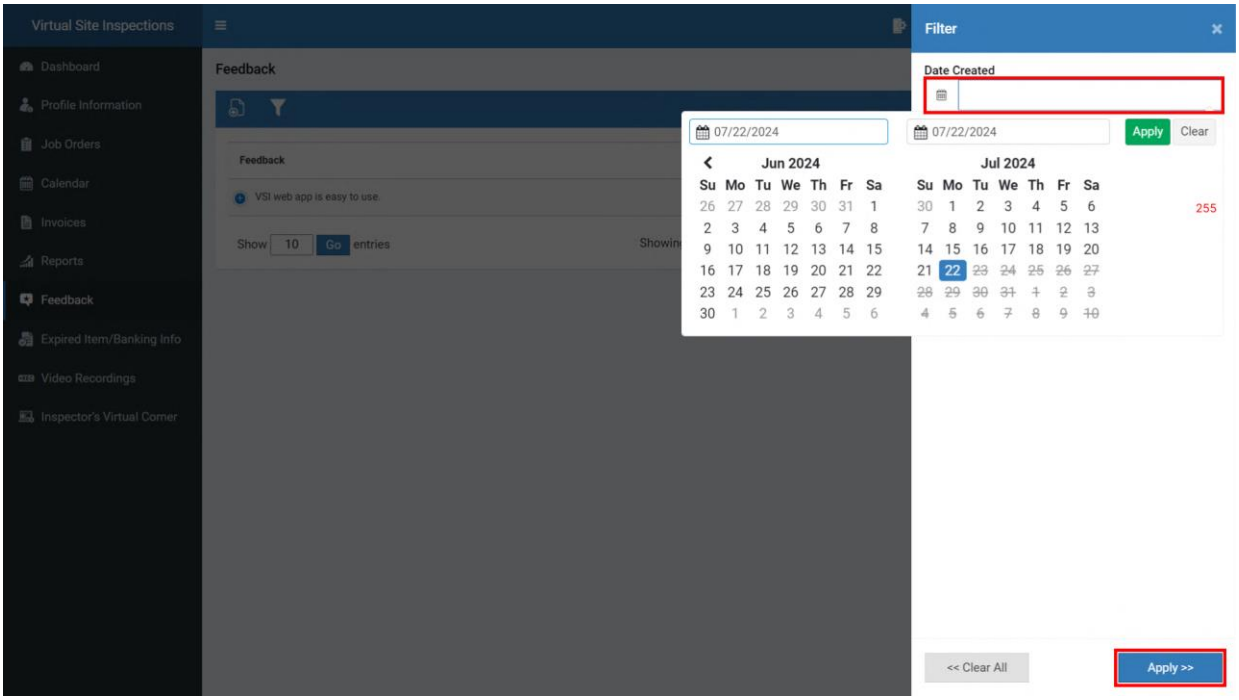
To search for feedback using a keyword, the system conducts the search based on the feedback and status parameters. Enter your search term in the highlighted search field, as shown in the provided screenshots, and press enter or click on the finder icon next to the text field. Subsequently, the system will display a list of relevant feedback records corresponding to the specified search criteria.



Users can utilize the filter option for feedback, accessible in the blue header bar as depicted in the accompanying screenshot.



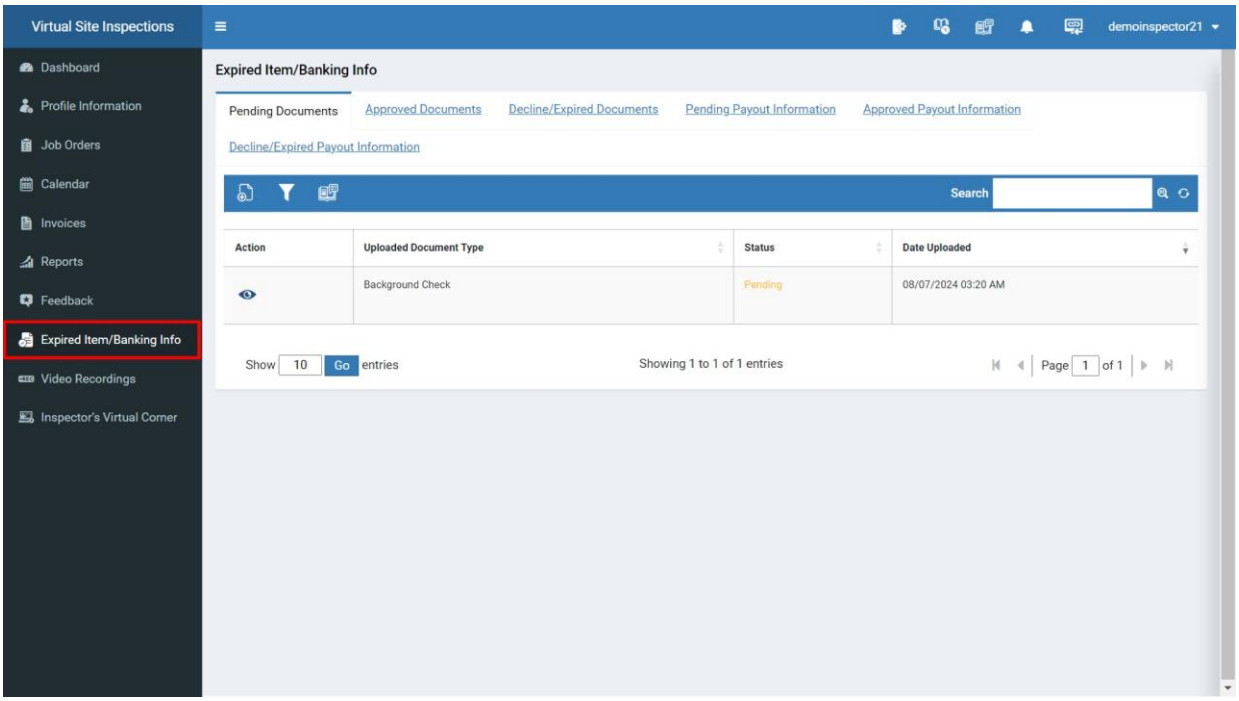
Clicking on the "Filter" option will open a side modal. Within this filter modal, there is a text box labeled "Date Created" where users can apply filters based on a specific date range using the date picker. Once the desired date range is selected, clicking on the "Apply" button will implement the filter, returning the records in the feedback list. Subsequently, the side modal will close.



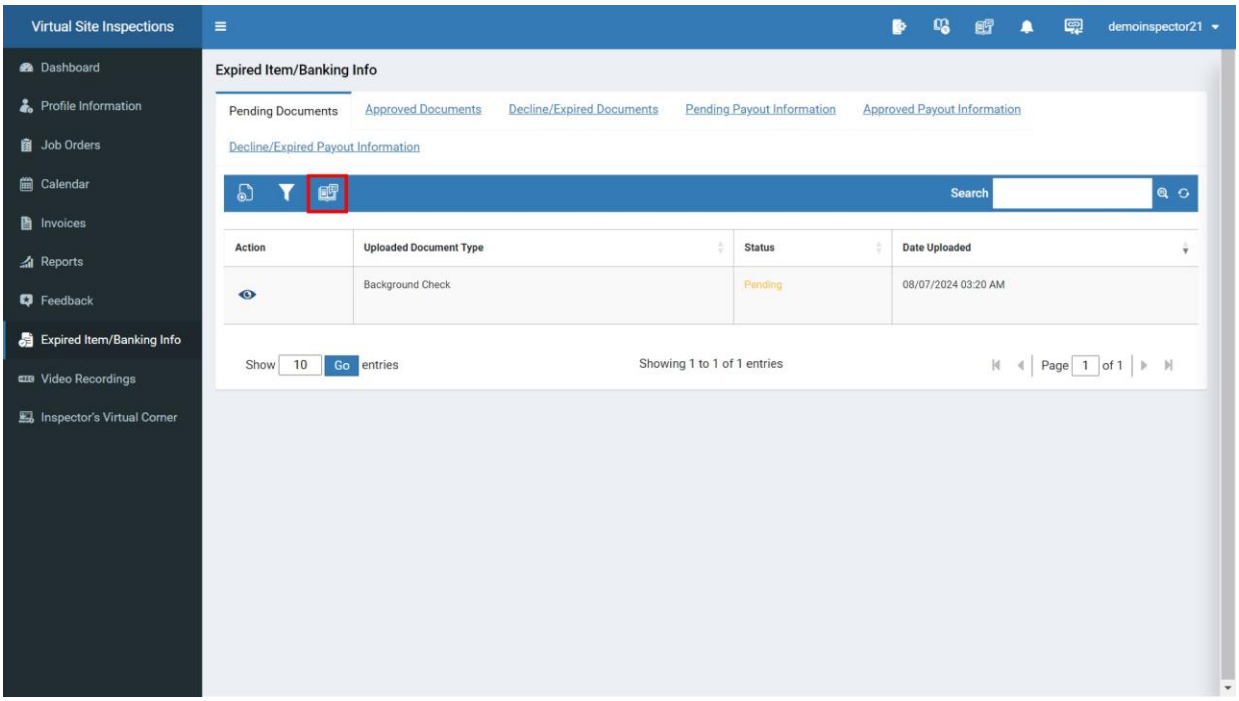
Expired Items/Banking Info

The "Expired Item/Banking Info" feature serves the purpose of uploading new documents if the existing ones have expired. However, this menu will not be visible when your profile status is InActive.

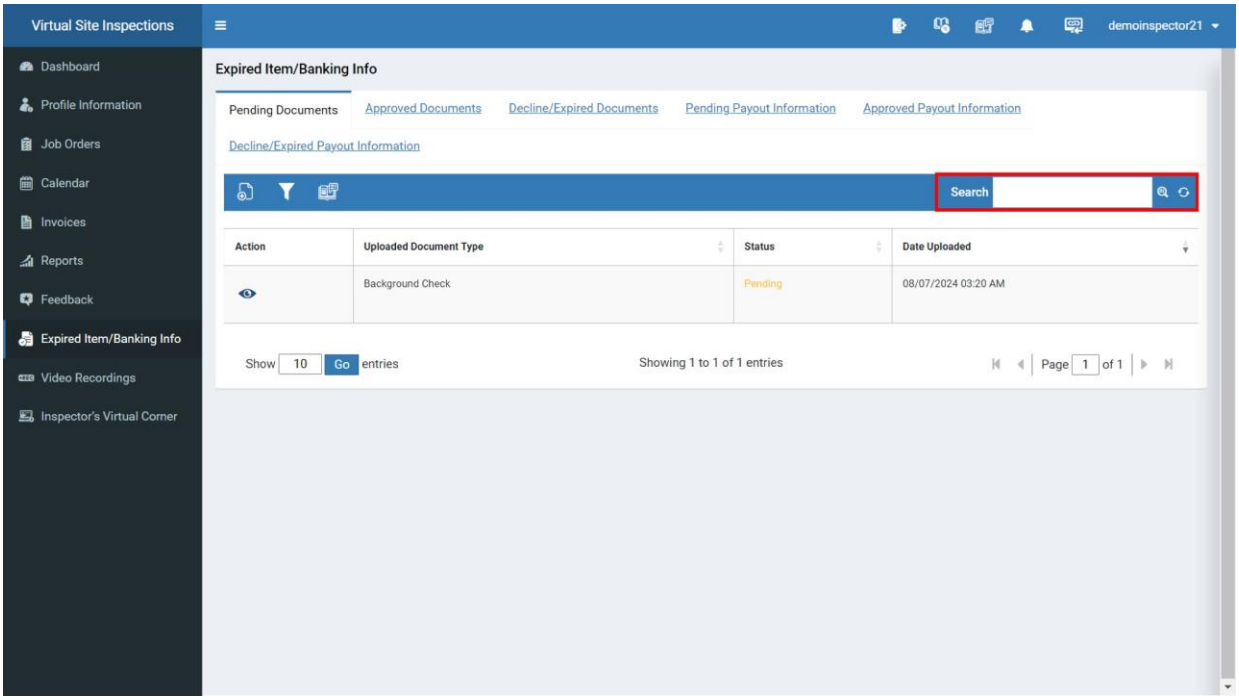
Inspectors can access the Expired Items by clicking on the 'Expired Item/Banking Info' menu located in the left-side panel. This action directs users to the Expired Item/Banking Info List page, where they can view and manage documents that have reached their expiration date.



To access the User Guide, click on the "Expired Item User Guide" button provided. This action will redirect you to a new page and display information related to the Expired Item.

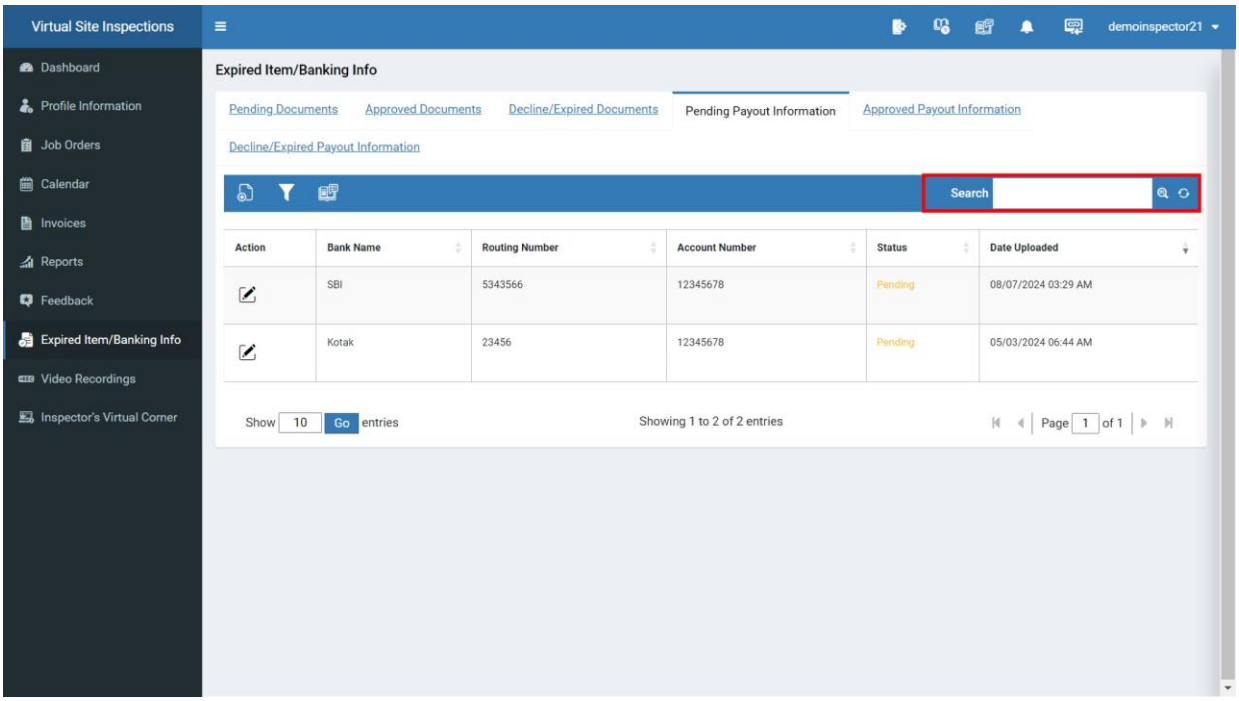


To search for a document using a keyword, the system conducts the search based on the uploaded document type parameters. Enter your search term in the highlighted search field, as demonstrated in the provided screenshots, and press enter or click on the finder icon next to the text field. Subsequently, the system will display a list of relevant document records corresponding to the specified search criteria.



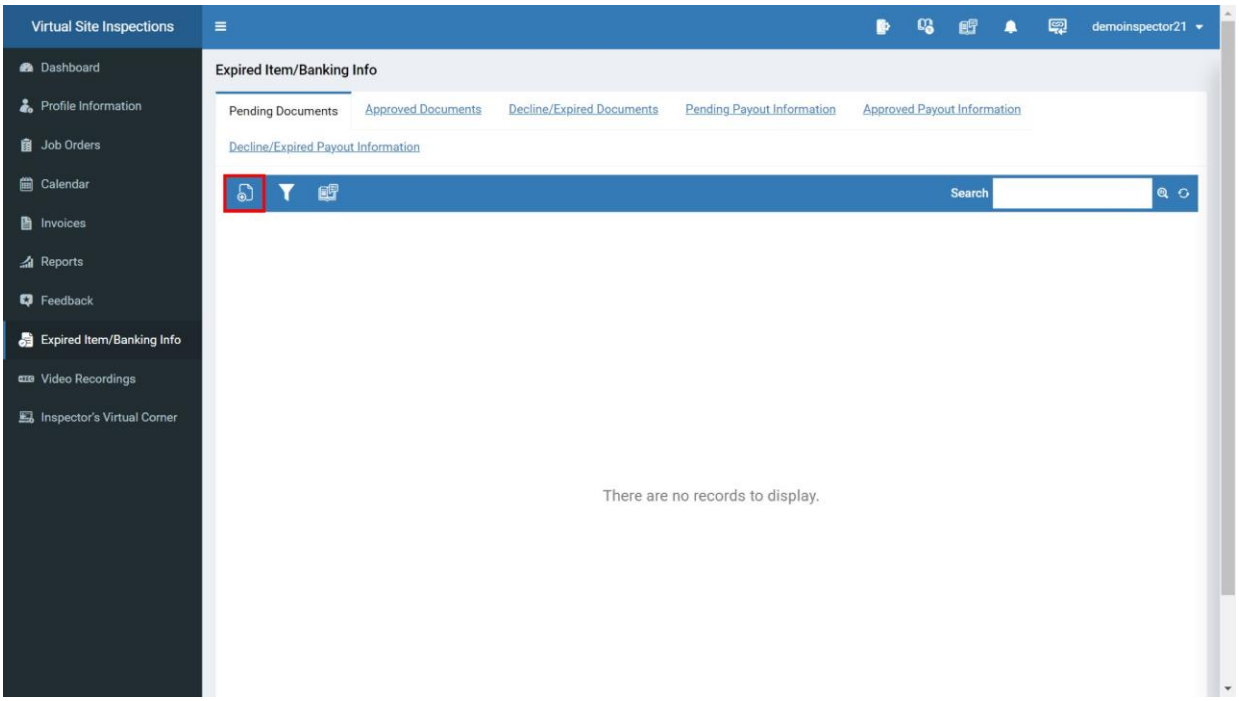
To search for payout information using a keyword, the system performs the search based on parameters such as the bank name and routing number. Enter your search term in the highlighted search field, as demonstrated in the provided screenshots, and then press enter or click on the finder

icon next to the text field. Subsequently, the system will display a list of relevant payout information records corresponding to the specified search criteria.



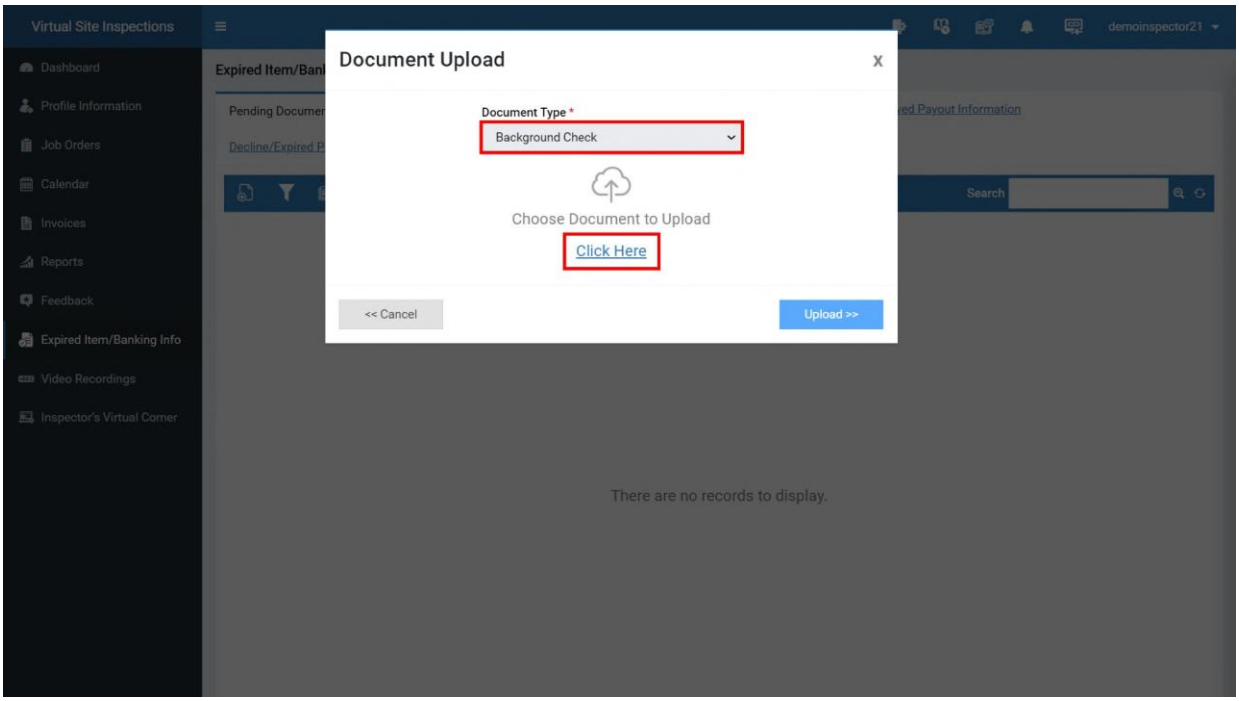
The "Expired Item/Banking Info" Page comprises six tabs: "Pending Documents", "Approved Documents", "Decline/Expired Documents", "Pending Payout Information", "Approved Payout Information" and "Decline/Expired Payout Information." The "Pending Document" tab showcases all pending documents, the "Approved Documents" tab presents a list of all approved documents, and the "Decline/Expired Documents" tab exhibits all declined or expired documents.

To upload a new document, inspectors can click on the "Add New" button icon. This functionality enhances the organization and management of documents within the system.

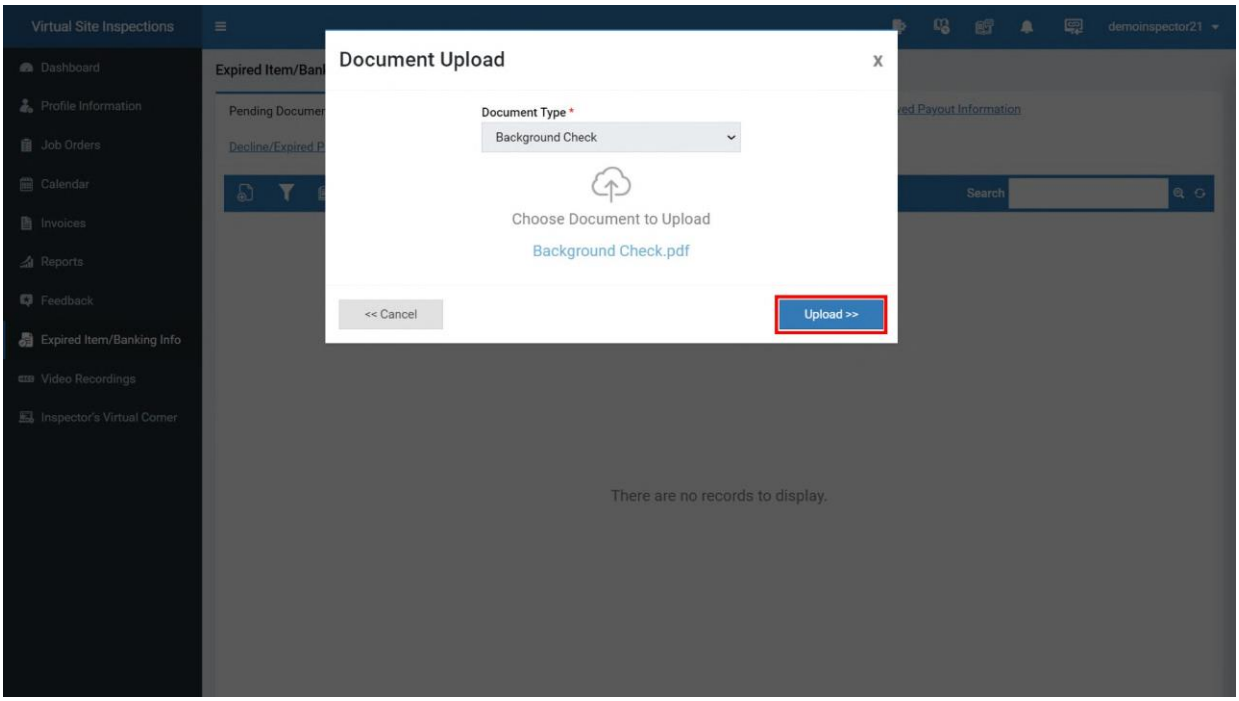


Upon clicking the "Add New" icon,it opens a dialog box for uploading documents. In the dialog box, the “Background Check” document is automatically selected in the drop-down menu, and it remains disabled. To upload the Background Check document, they need to click on the "Click Here" hyperlink, facilitating a straightforward process for adding new documents in the system.

Note : Inspector can not upload the background check document again until it’s not approved or declined by the admin.

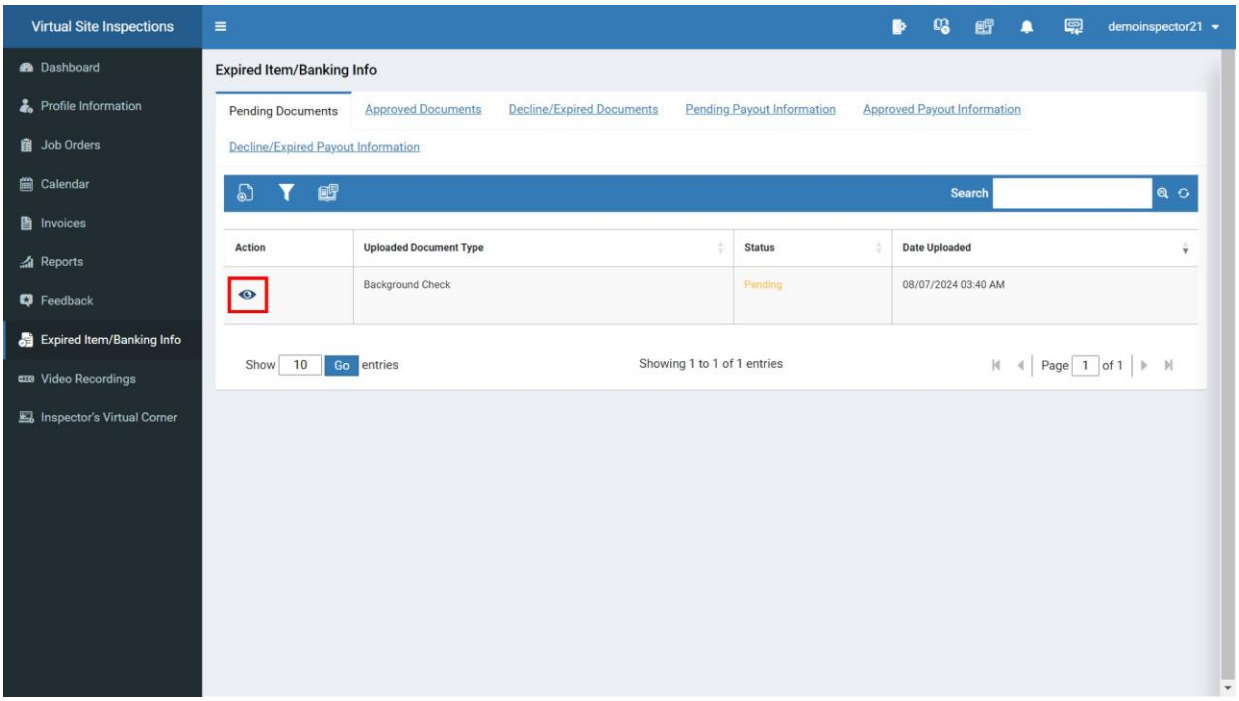


After clicking on the "Click Here" hyperlink, a system pop-up prompts the user to select a file. The system allows the upload of only doc, pdf, and image files. Once the user selects a file, the system displays the name of the chosen file. Subsequently, clicking the "Upload" button finalizes the upload process, adding the document to the list.

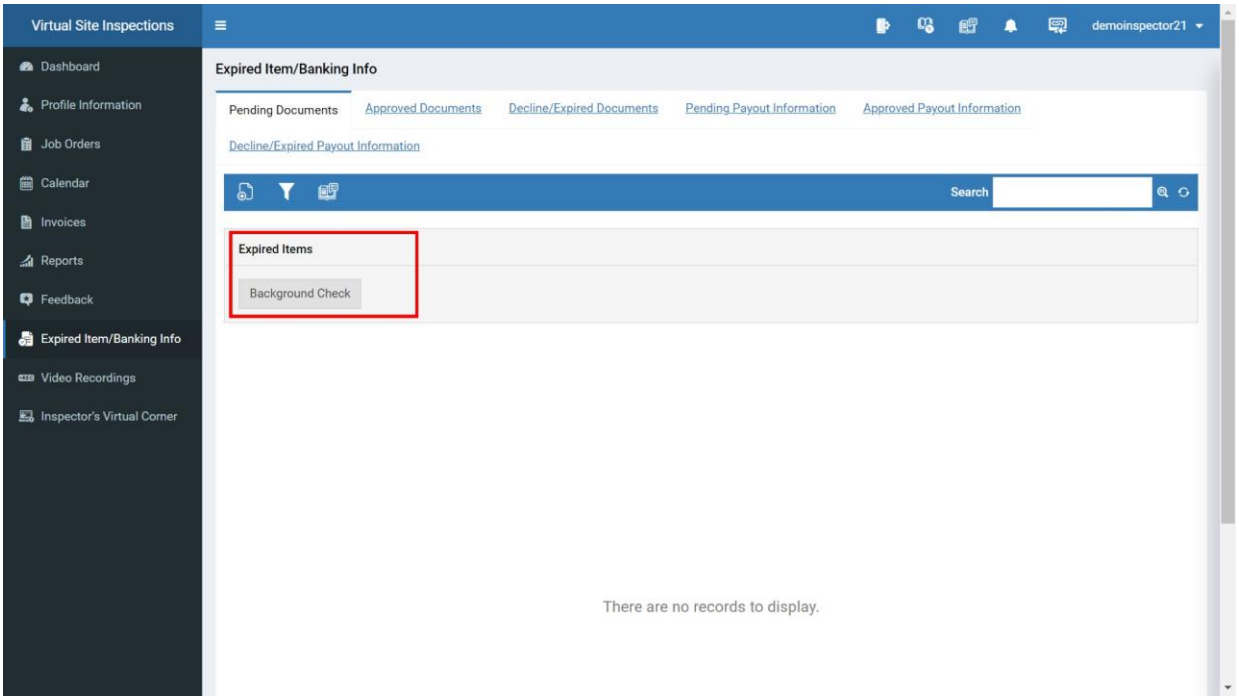


Various status tabs, such as pending documents, approved documents, and decline/expired, are assigned to documents within the system. When an inspector uploads a document, its initial status is set as pending. Upon approval by the admin, the document's status transitions from pending to approved. Conversely, if the admin rejects the document, its status changes from pending to declined.

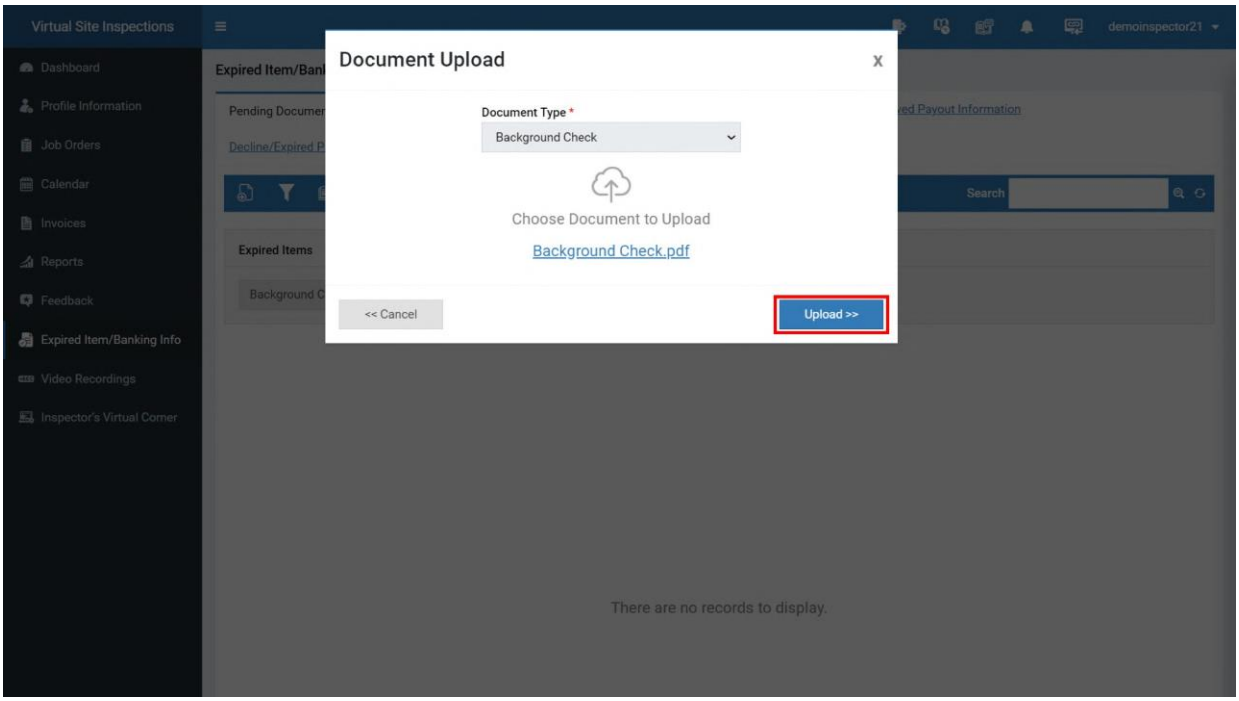
In the Document list, there is one icon: View. Clicking on the View icon redirects to a new window, displaying the document file that was uploaded into the system. This functionality enables easy access to view the content of the document directly.



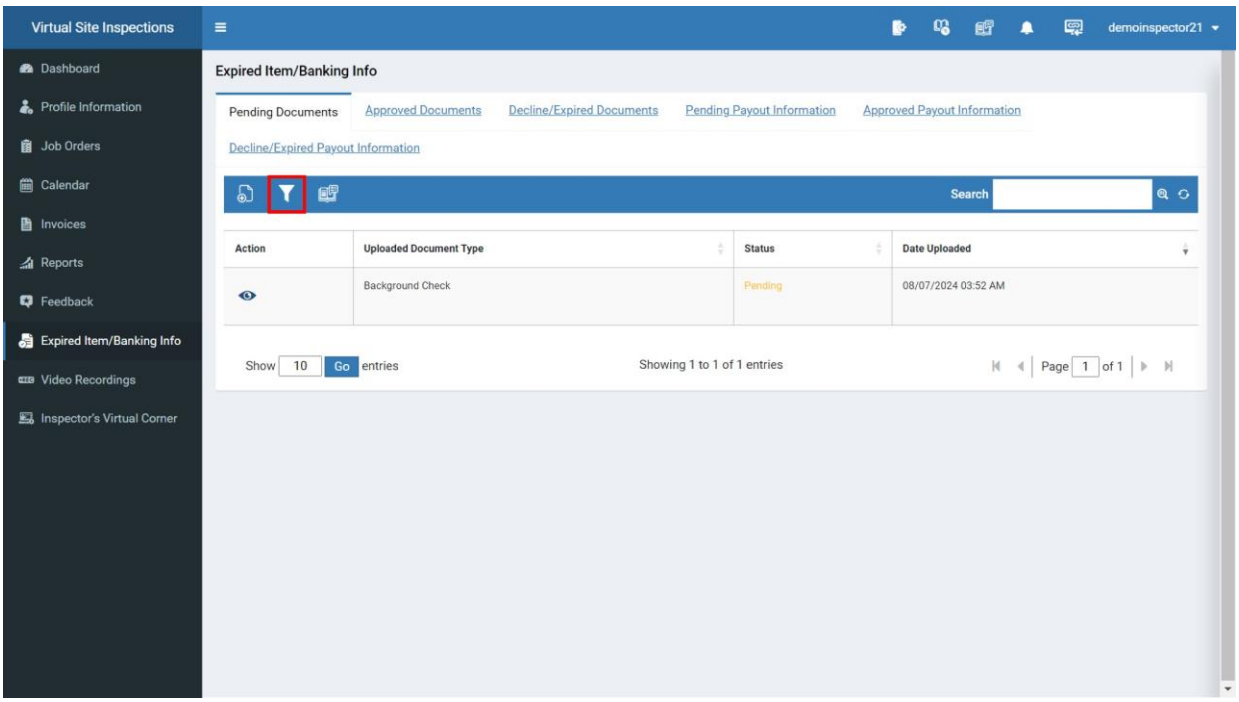
After the blue header bar, there is a section titled "Expired Items" that appears if any item has expired. This section becomes visible along with an "Expired Items" button.



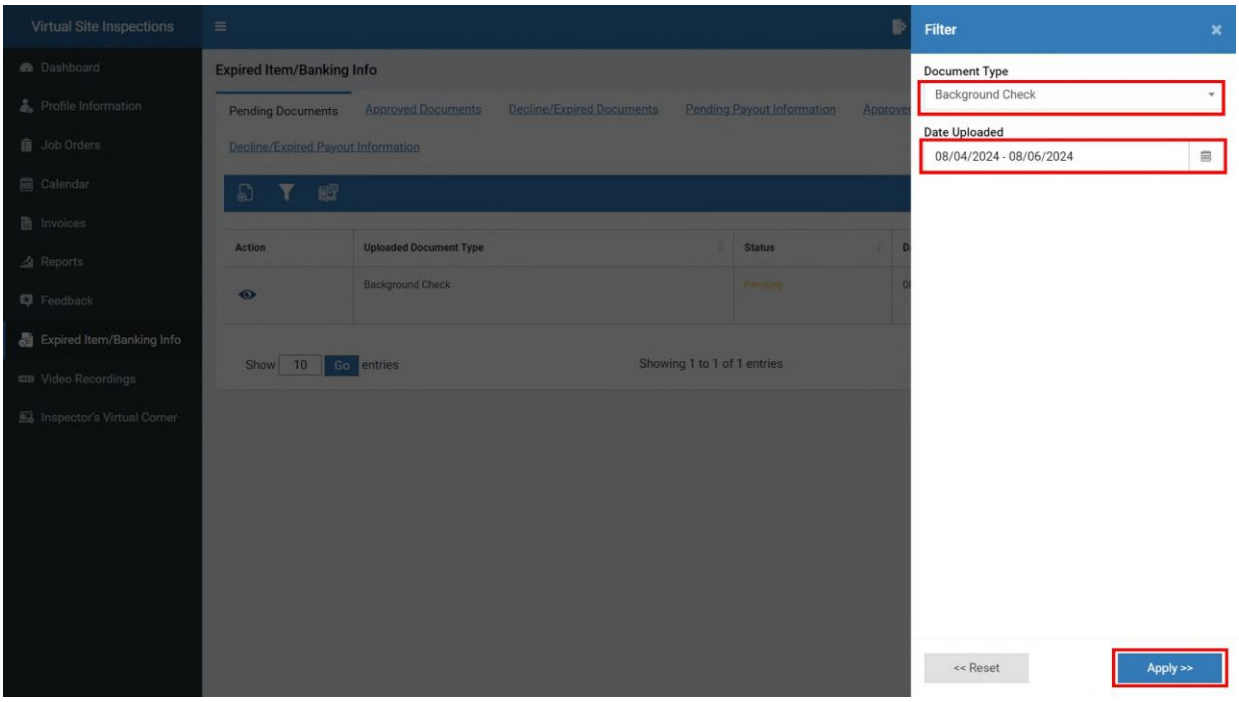
Upon clicking this button, it opens a dialog box for uploading documents. In the dialog box, the expired item is automatically selected in the drop-down menu, and it remains disabled, indicating that only document upload is required.



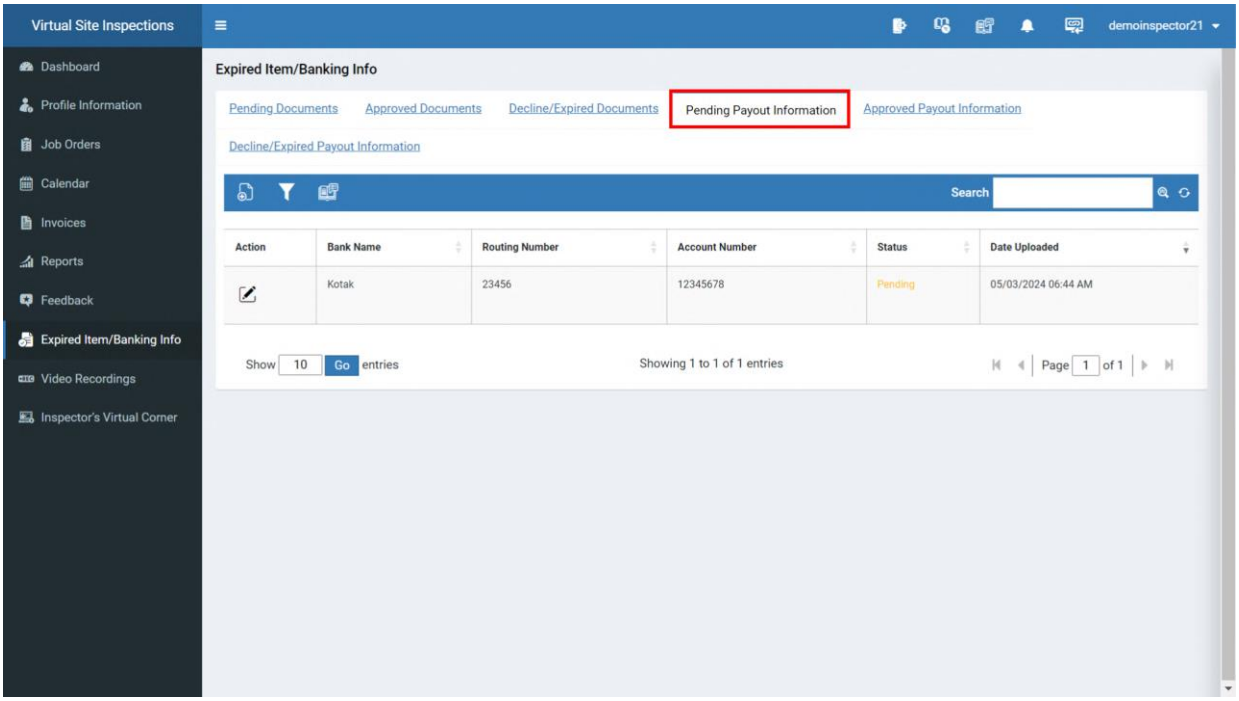
Inspectors have the ability to apply filters to documents, allowing them to refine and customize the display based on specific criteria.



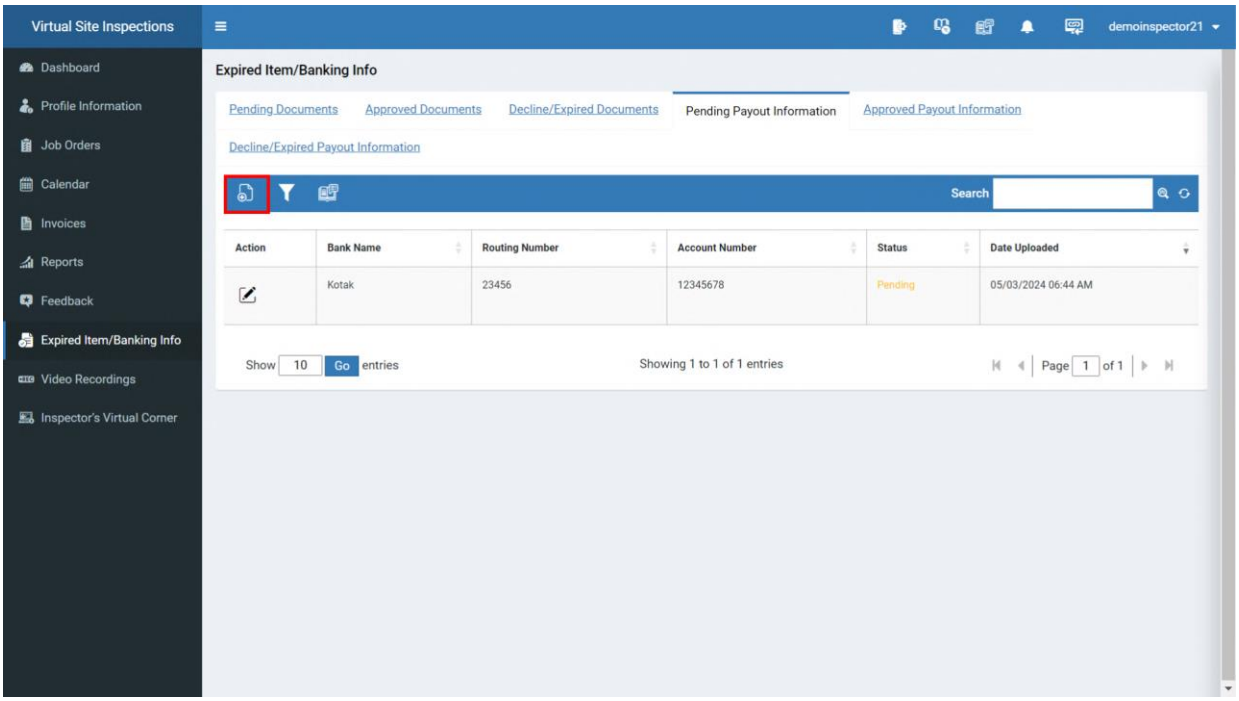
Clicking on the filter icon opens a side modal where users can select criteria such as type, date. After selecting the desired filter options, clicking on the "Apply" button returns a filtered list based on the chosen criteria, providing a tailored view of documents.



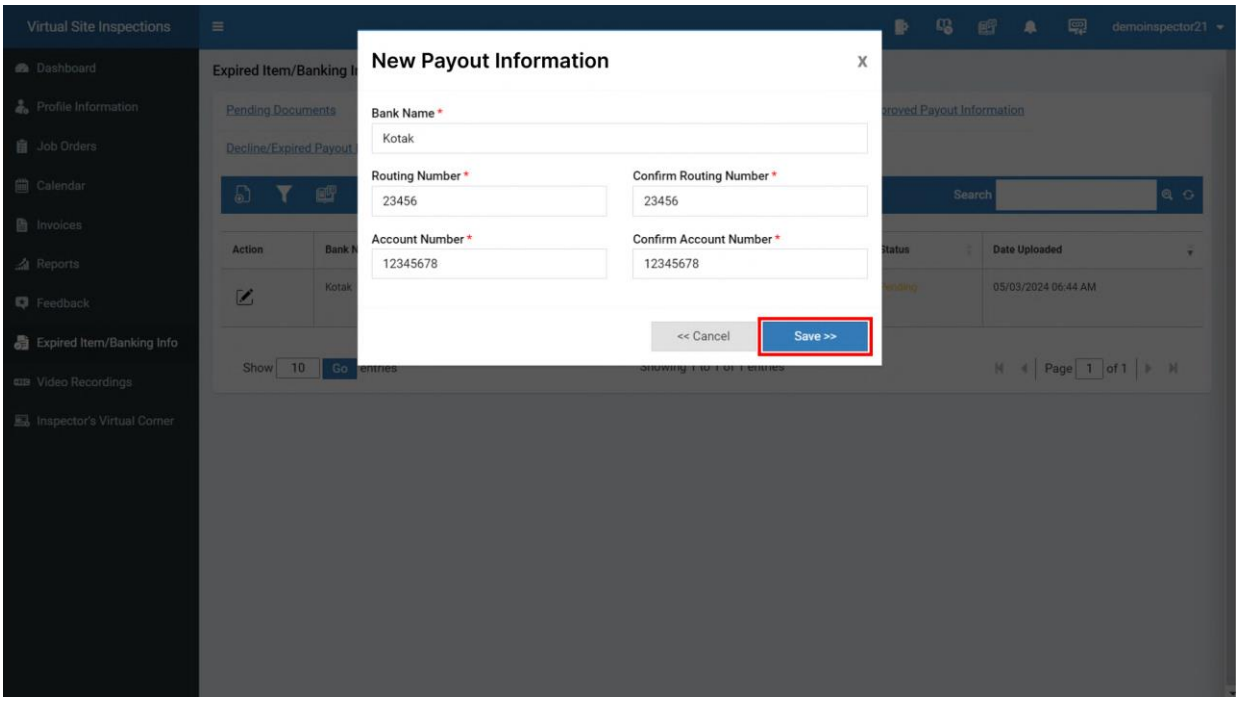
Inspectors have the ability to add their payout information. Additionally, they have the ability to view a list of the payout information they have entered.
The purpose of adding payout information is to enable inspectors to update their banking details. Once banking information is added, it becomes disabled for modification. Upon the admin's approval of the payout information, your payout/banking information will automatically be updated in the 'Profile Payout Information' section of the 'Invoice Information' tab in your profile.



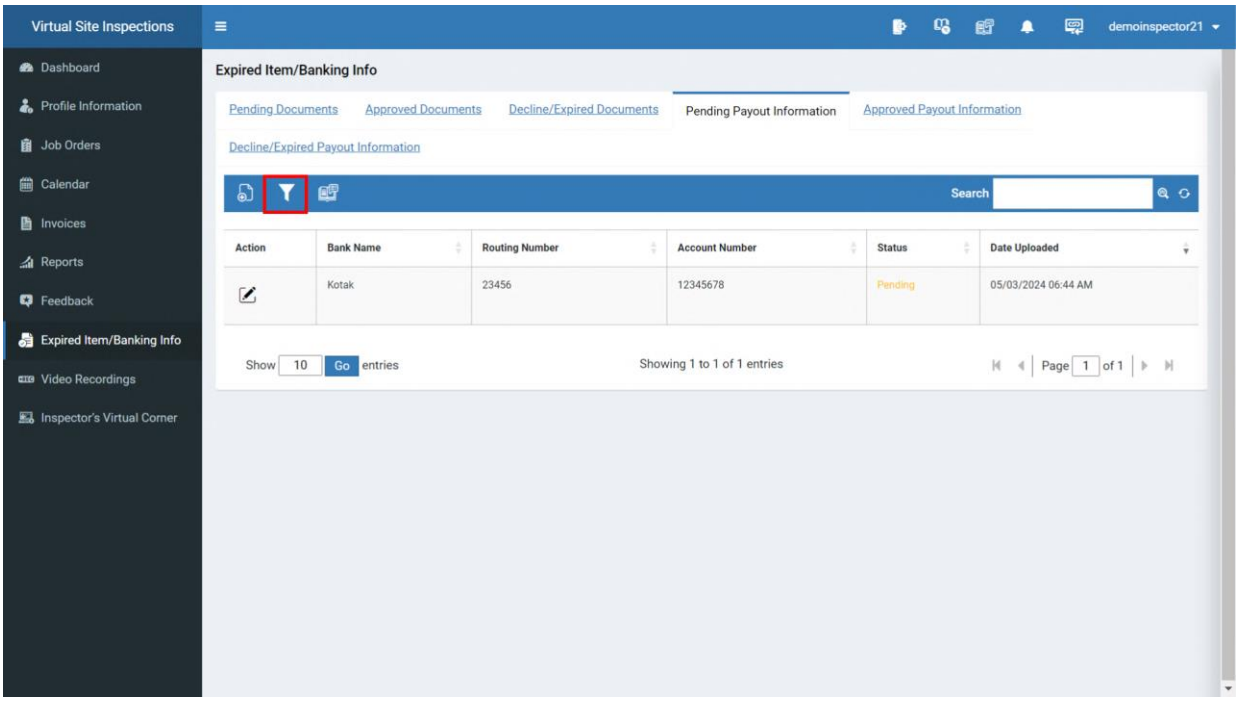
To add payout information, click on the "Add New" icon.



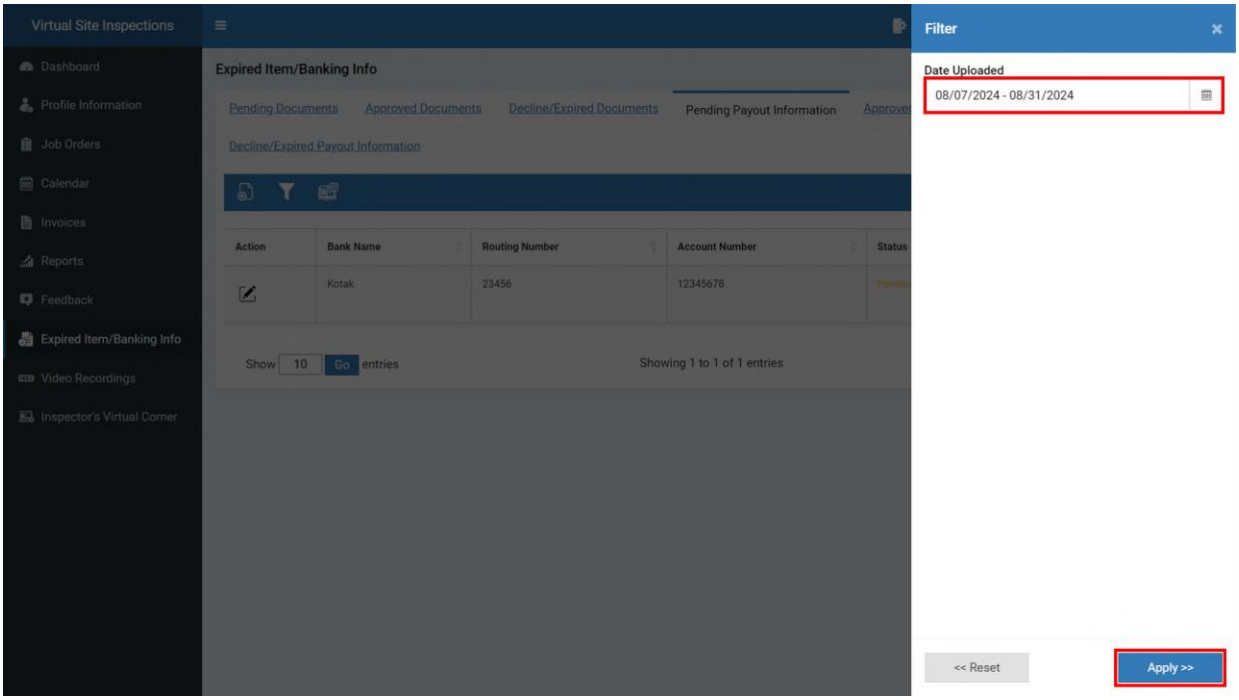
After clicking on the "Add New" icon, a popup will appear, prompting users to fill in details such as bank name, routing number, confirm routing number, account number and confirm account number. Once all the information is entered, clicking on the "Upload" button will add the payout information to the list and the popup will close.



Inspectors have the capability to apply filters to payout information by clicking on the filter icon.



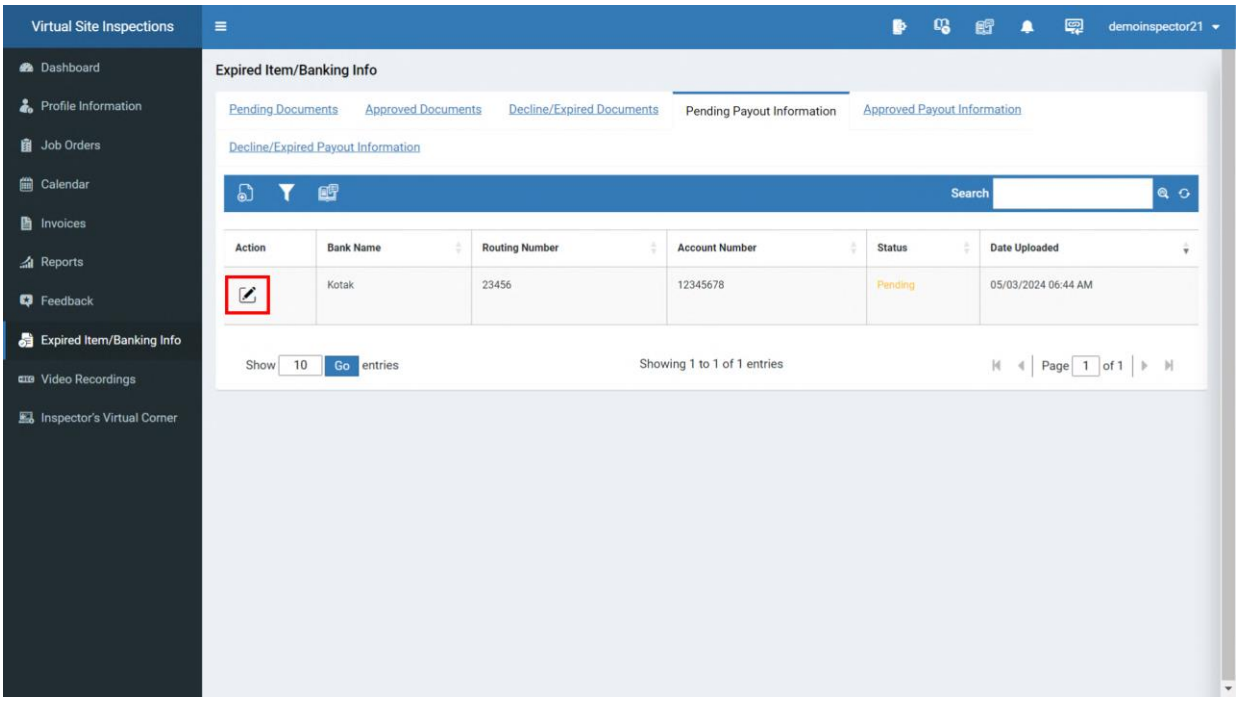
Clicking on the filter icon opens a side modal, allowing inspectors to apply filters to payout information based on criteria such as status and upload date. After selecting the desired options, clicking the "Apply" button returns a list of payout information tailored to the chosen filter selections.



In the payout information list, various statuses such as pending, approved, declined, and expired are assigned to payout data. When an inspector add payout information, its status begins as pending. If the admin approves the payout information, the status transitions from pending to approved, and the new payout information will be updated. This updated payout information will be used for any subsequent payments.Conversely, if the admin rejects the payout information, the status changes from pending to declined.

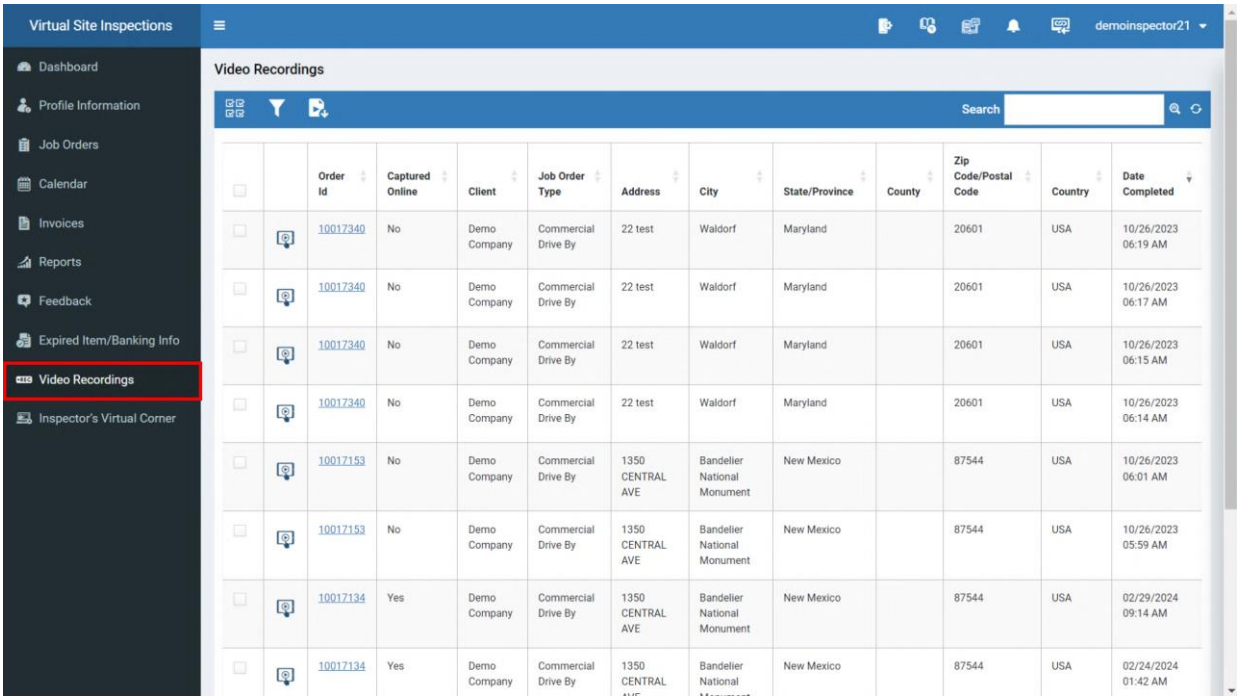
If the inspector adds new payout information of the same type multiple times and the admin accepts or declines the status, the status of the latest payout information of that type changes accordingly. Meanwhile, the statuses of the previously added payout information of the same type are marked as expired.

Within the payout information list, When the status is approved, declined, or expired, only the View icon is displayed. For pending statuses, the Edit icon is visible. To modify payout information, users can click on the Edit icon, and the process follows the same steps as adding new payout information. Clicking on the View icon opens a popup in disabled mode.

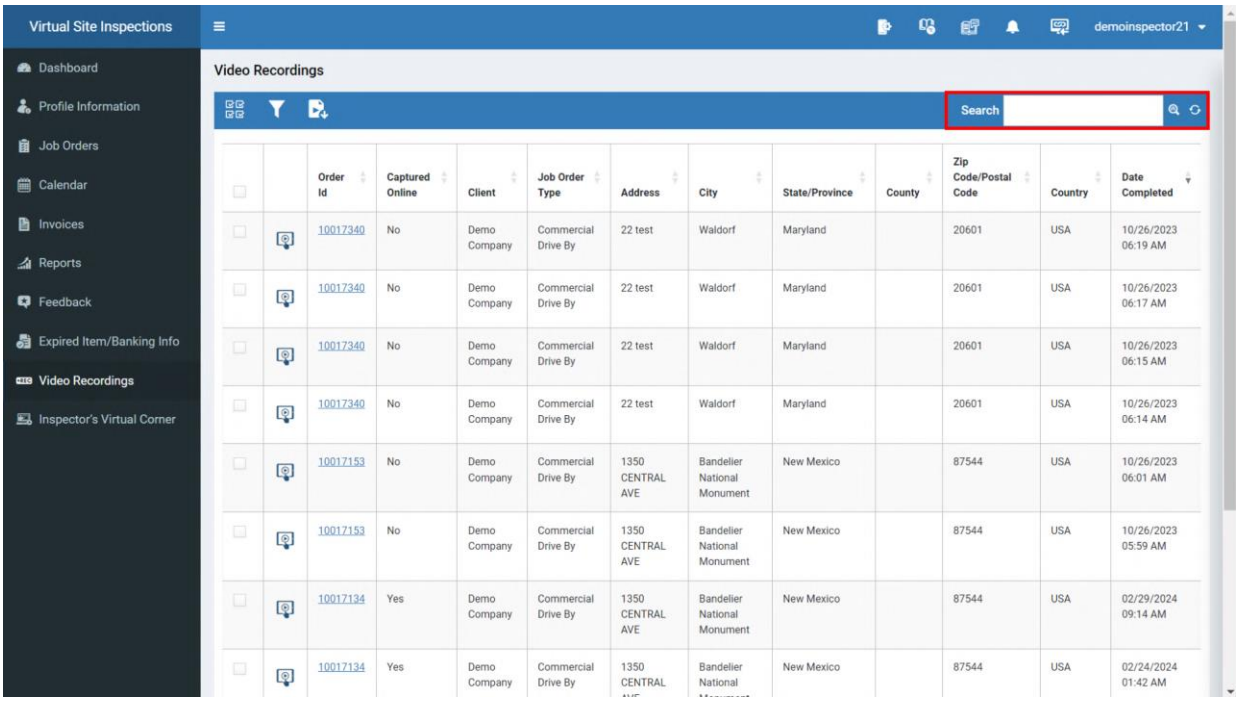


Video Recording

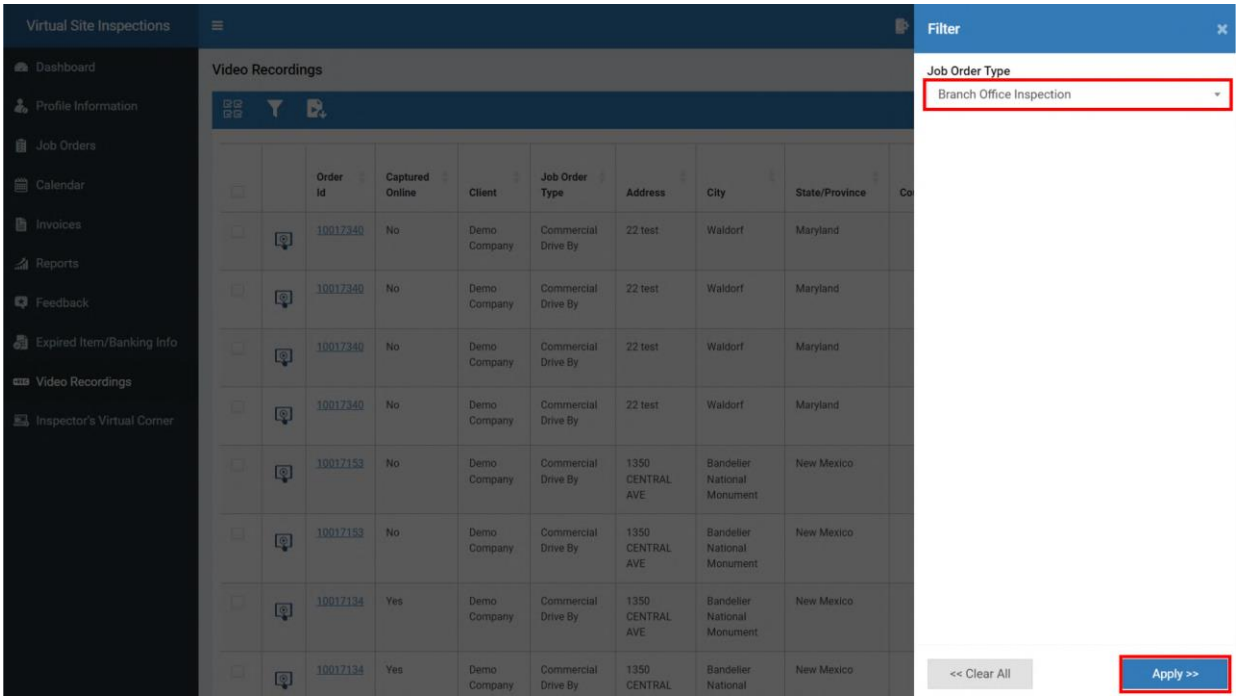
Inspectors can record video calls during inspections, and these recorded videos are accessible through the video recording menu for later review and reference.



To search for a video recording keyword, the system conducts the search based on the Job Order ID, Address, City, State, County, Zip Code, Country. Enter your search term in the highlighted search field, as depicted in the provided screenshots, and press enter or click on the finder icon next to the text field. Subsequently, the system will display a list of relevant video recording lists corresponding to the specified search criteria.

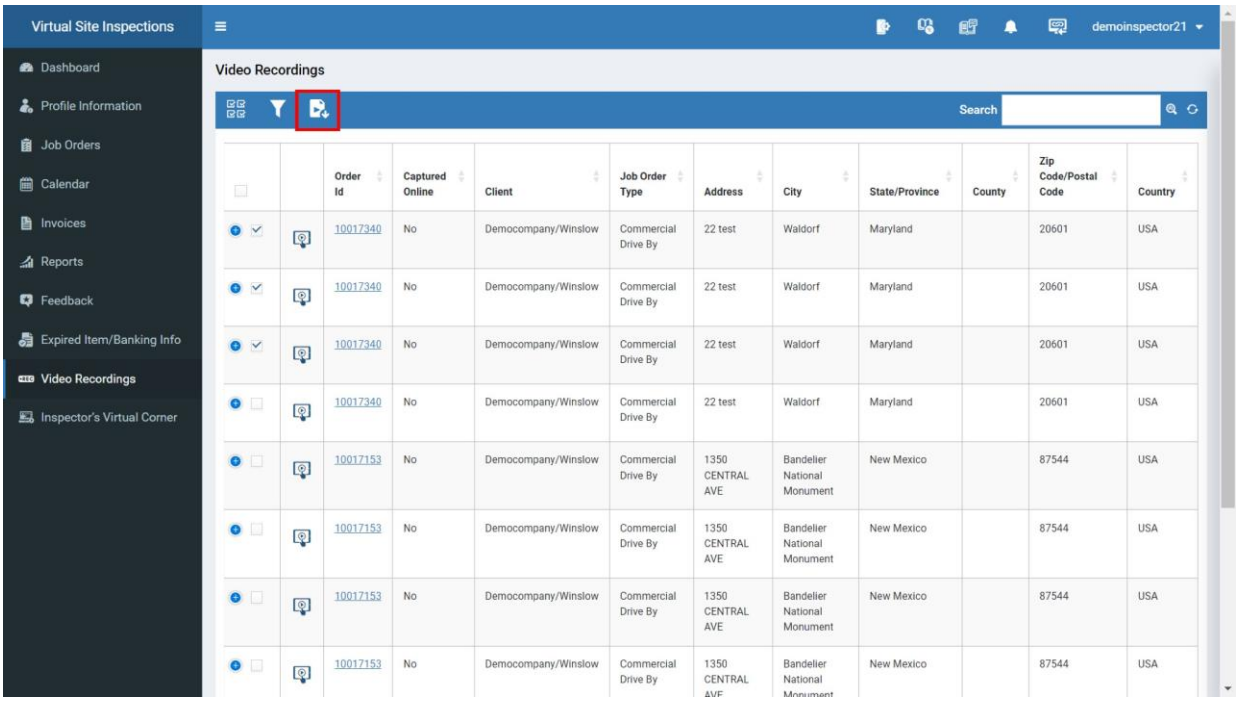


After clicking on the filter icon, a side modal will open, allowing users to apply filters on Job Order Type Field. Users can select the Job Order Type field. Upon clicking the 'Apply' button, the system will generate a list based on the selected Job Order Type.

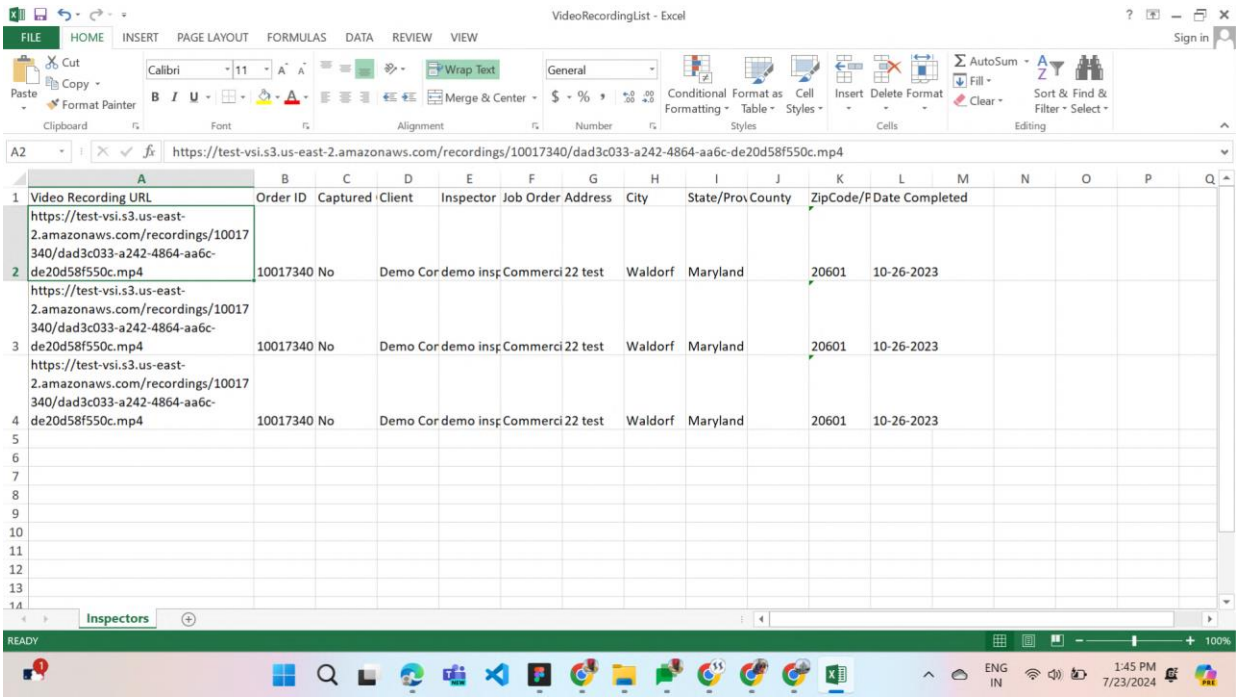


Export Video Recording Details

The "Export Video Recording Details " icon is utilized to download video recording details in an XLS file format. It is mandatory to select at least one job order, and you also have the option to choose multiple records. If you wish to download the entire list, click on the "Select All" icon and then press the "Export Video Recording Details" icon. This action will generate an XLS file containing the information based on the selected job orders.

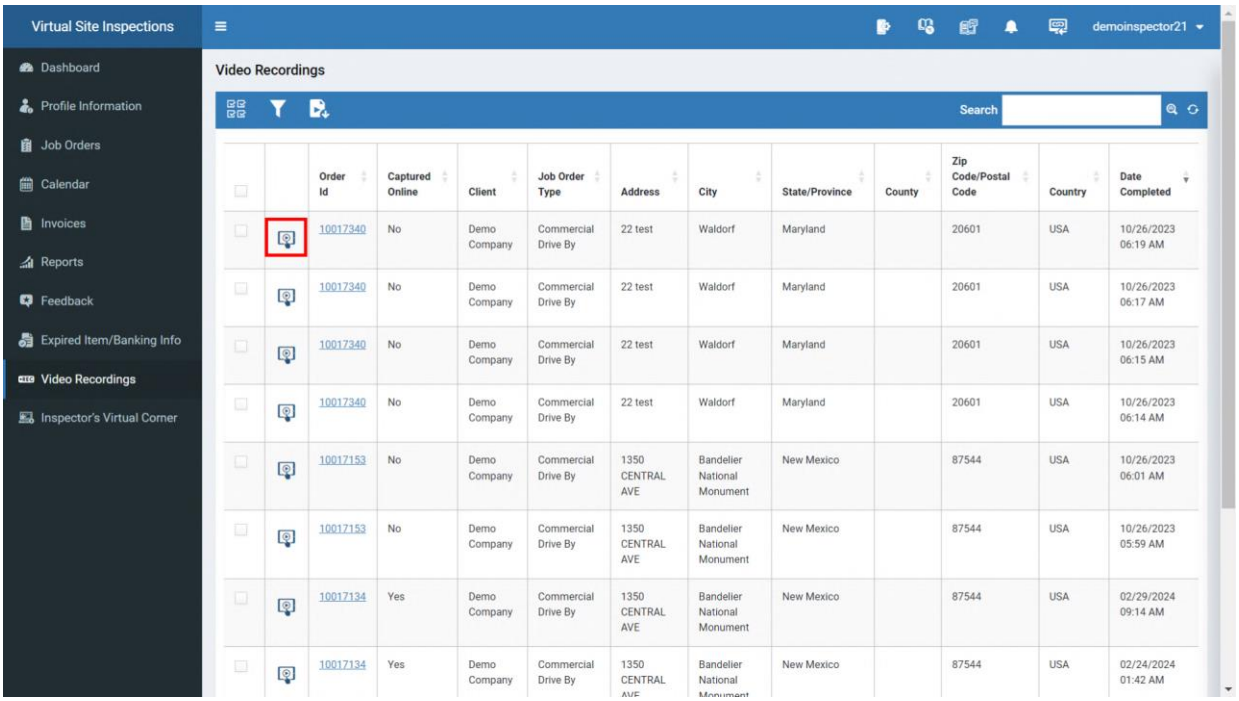


After clicking on the icon, it will download an XLS file to your system. You can preview the download in the screenshot below.

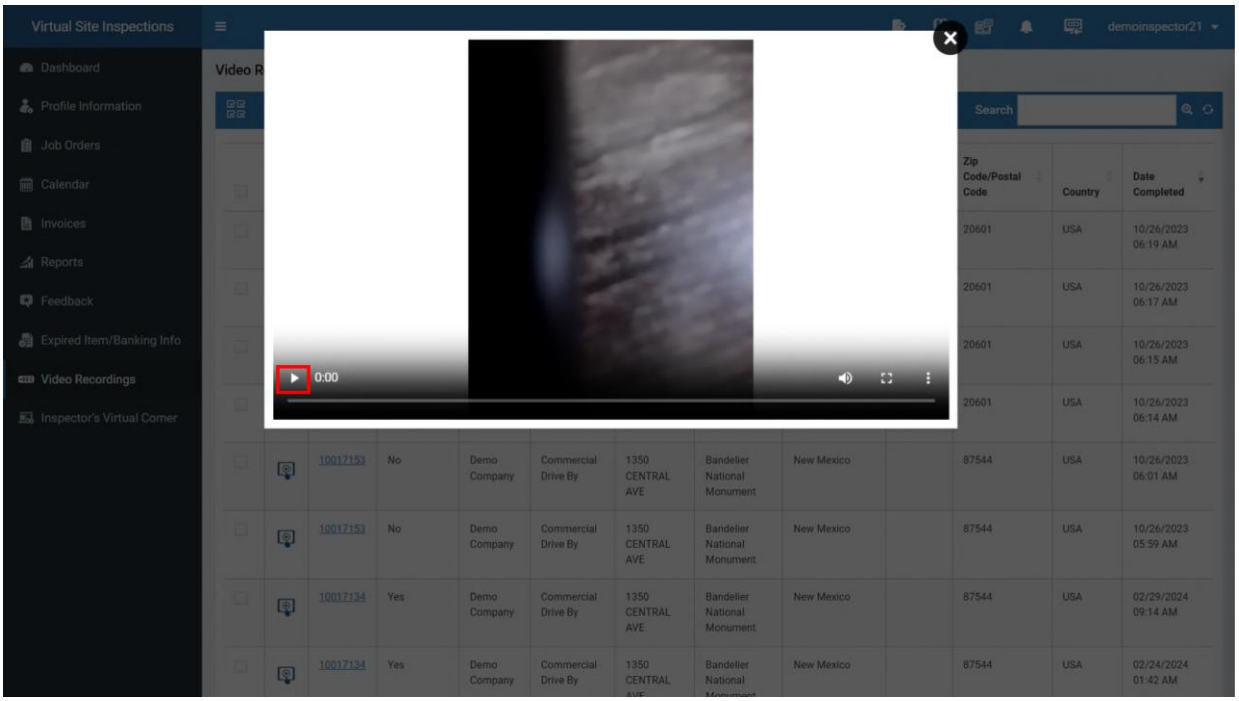


Play Video

Recorded video can play by clicking on the Play icon from the grid.



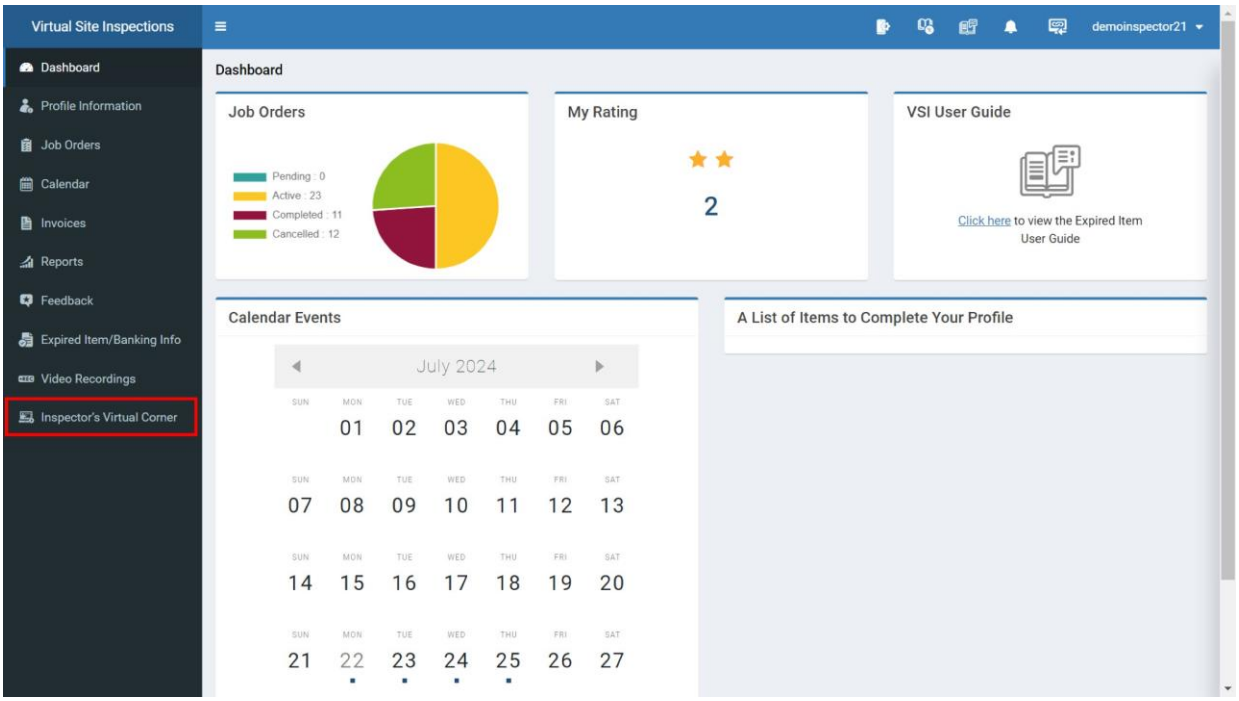
After clicking on the "Play" icon from the grid, a video popup will appear, enabling the inspector to play the recorded video by clicking the play icon within the popup.



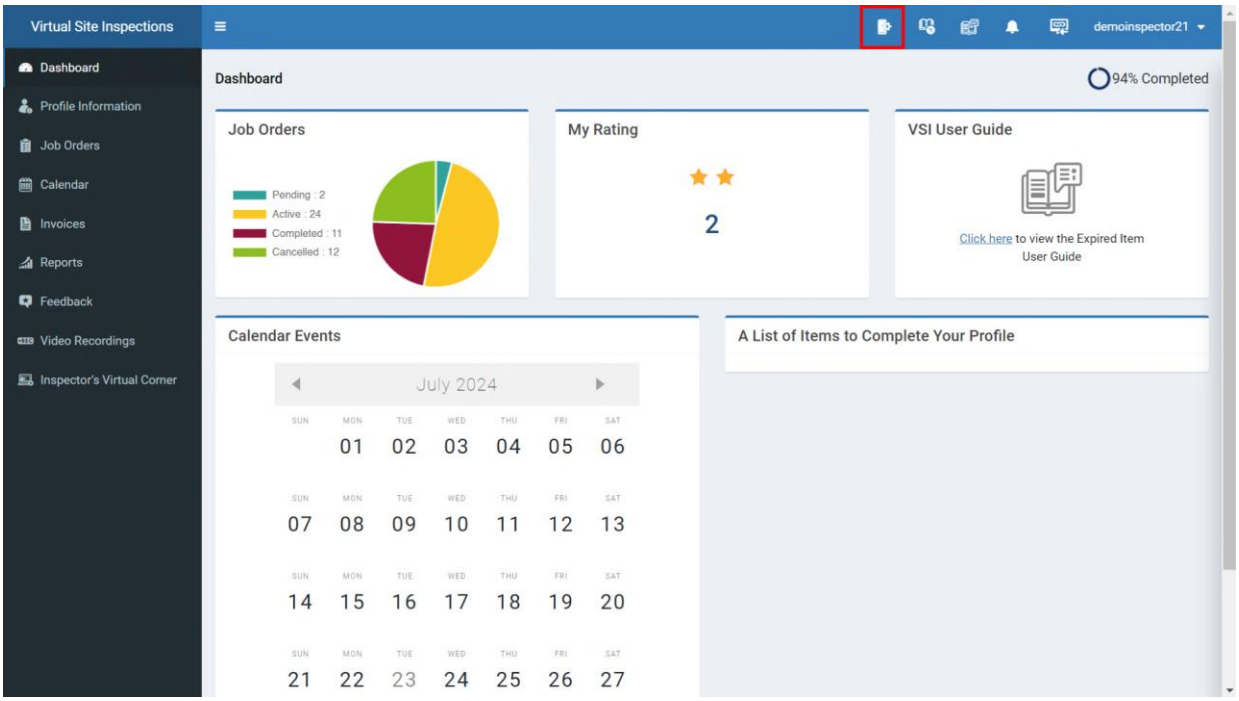
Inspector can navigate directly to the Inspection Form Details tab of a particular job order by clicking on that job order from the grid.

Inspector’s Virtual Corner

Inspector Corner is employed for user guides. When the Inspector Corner menu is clicked, it opens a new window with the corresponding specific URL.

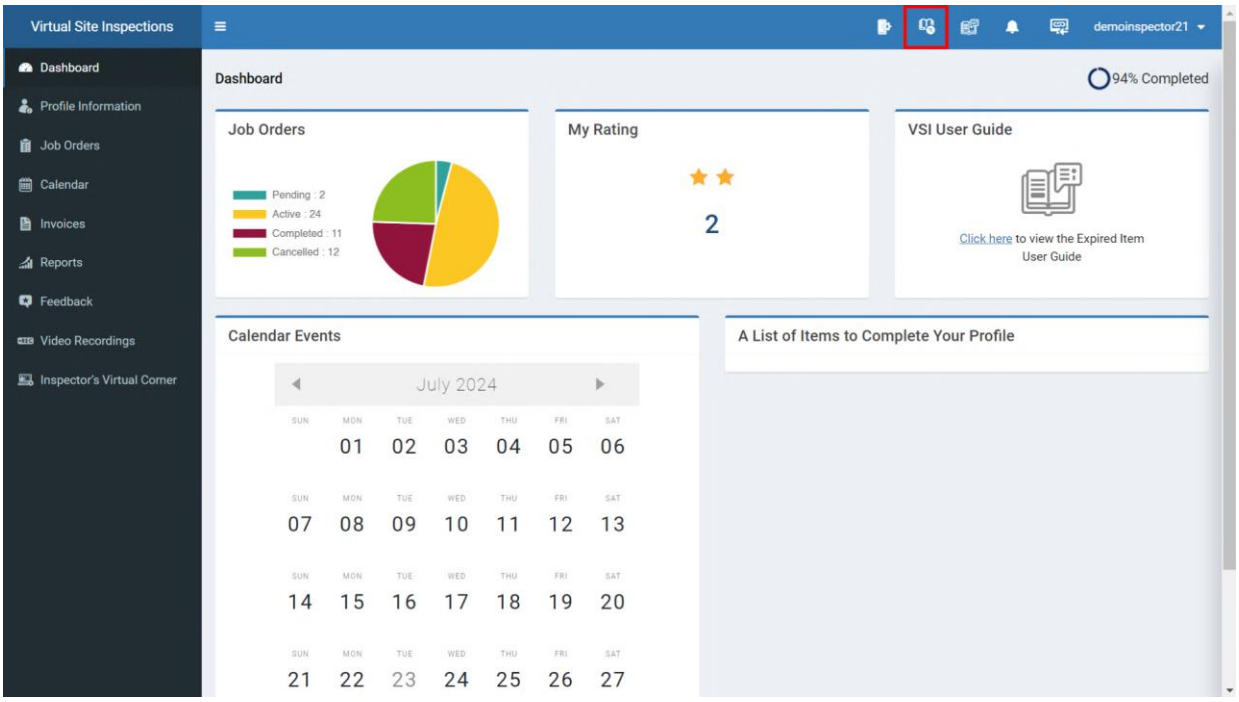


Mobile Settings



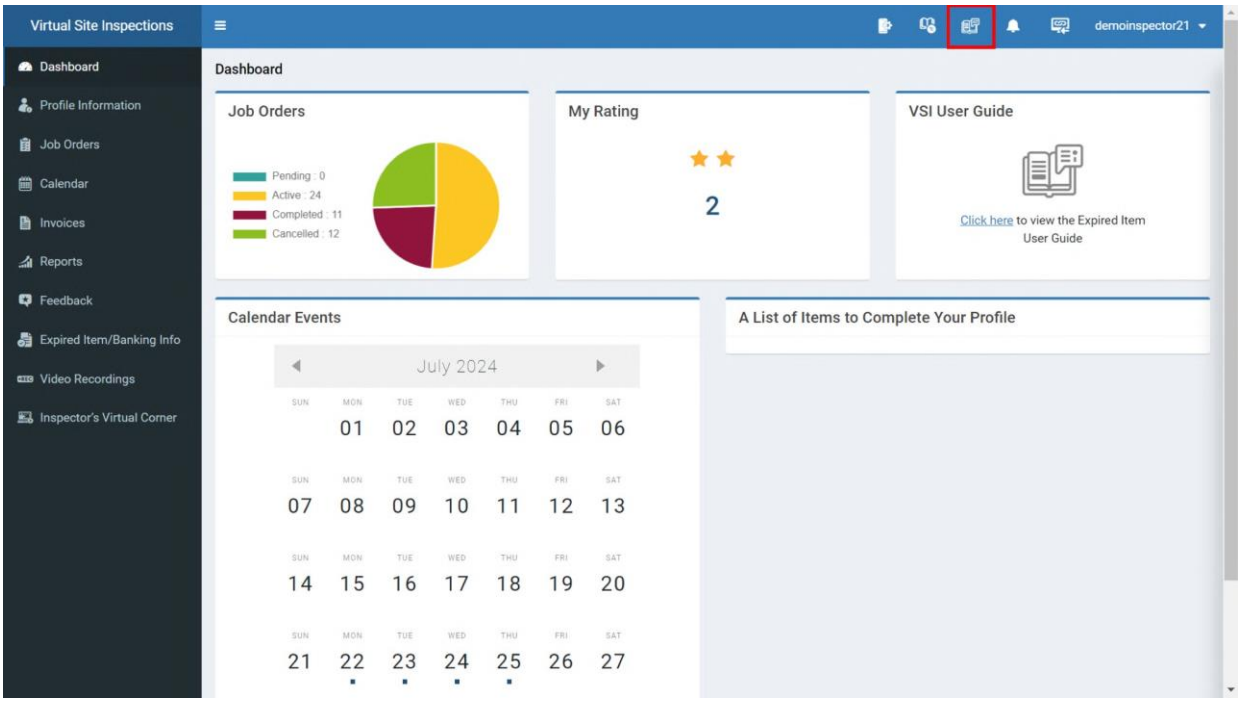
Offline User Guide

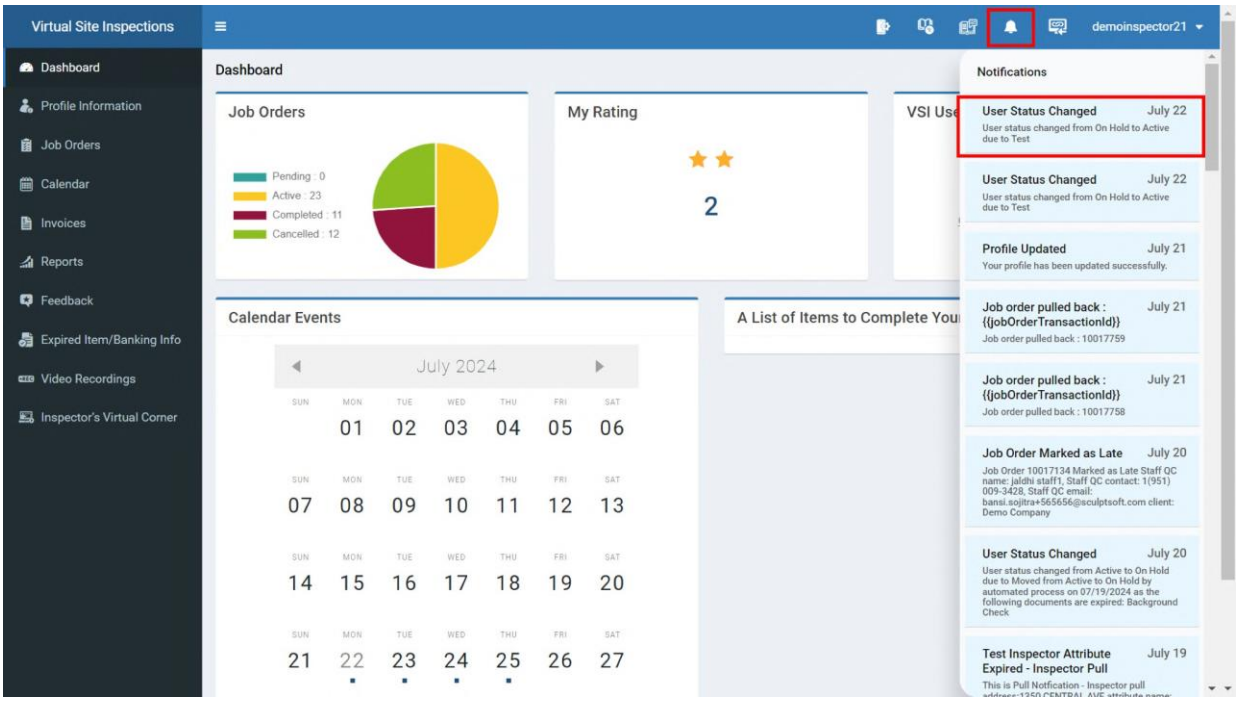
Inspectors can access the user guide document by clicking on the 'User Guide' icon. This action will redirect them to a new window, opening the document. The offline user guide provides instructions for conducting video calls without requiring internet connectivity.



User Guide

Inspectors can access the user guide document by clicking on the 'User Guide' icon. This action will redirect them to a new window, opening the document.



Notifications

You can view all the notifications they have received by clicking on the notification icon. This action will open a side modal displaying all the events and notifications.