

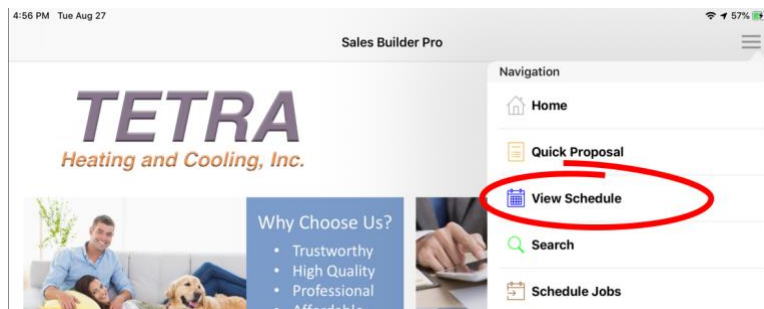
## How to Create, Edit and Save a Form

The Site Survey and the Comfort Survey were designed to be completed before the customer quote is built. Because forms are associated with a customer job, it is important to remember that a form must be created the day of the job.

This is the recommended Sales Call workflow:

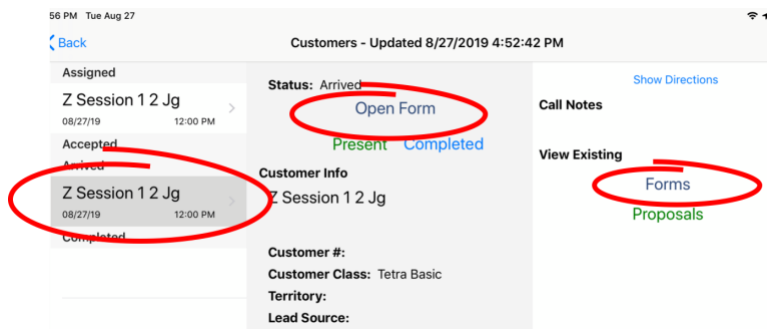
- Arrive at the job (Quick Proposal Customers will automatically arrive in the schedule)
- Open, complete and save the form
- Build the customer quote
- Complete the job

### **Step 1:** View Schedule



### **Step 2:** Select the assigned customer > Arrive at the job

**Step 3:** Tap **Open Form** to attach a new form to the job OR Tap **Forms** to view existing forms for this customer.



**Step 4:** Complete and SAVE the form. Incomplete forms can be reopened at a later date, but the form must be **created** while ARRIVED at the job. Scroll to the bottom of the form, tap **Submit** to save the form to the cloud. Tap **Save** to store the form on the tablet. Forms will save on the tablet for 90 days by default. Contact your Customer Success Specialist if you need to change the number of days a form is stored on your tablet. Forms are stored in the cloud indefinitely and can be downloaded to your tablet

as needed. The ideal number of days you store forms on your tablet will vary with the storage available on the tablet and the number of photos stored on a form.

**DELETE** will remove the form from the tablet and the cloud.

At the top of the form, tap **View** to display the PDF, tap **Action** to email, text, or print the form

**Scroll to bottom of form to Save**

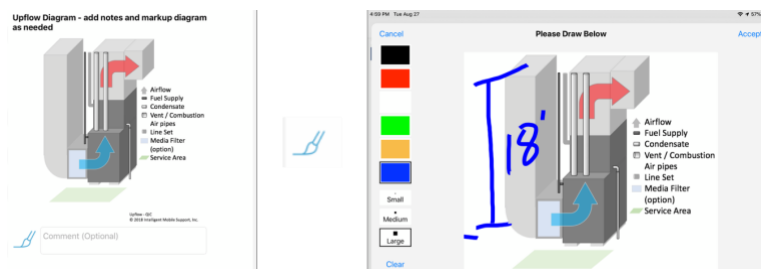
**Step 5:** Return to the schedule, tap **PRESENT** to open and build the quote. When finished with the quote return to your schedule to **Complete** the job. After completion, the form is sent to the cloud and is "locked". The form is available to view in the app. If you reopen the form in the app and make changes after completion the software will automatically create a new time date stamped form. The new form will be stored with the original job proposal.

Administrators can view all forms in the job timeline. (Sales Management Tools section of the Management Portal).

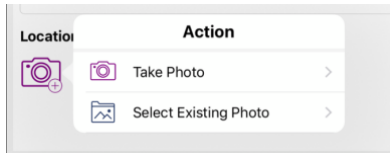
Form actions:



Drawings - Tap the paint brush; select line weight and color and edit the drawing.



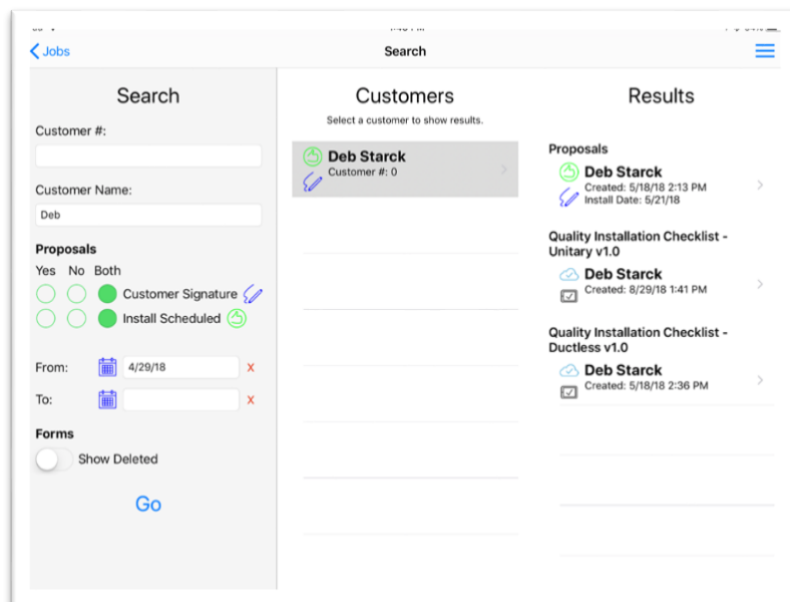
Photos – take a photo, or select from camera roll



To reopen a previously saved form:

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- 1) Select Search from the Navigation Menu
- 2) Search by Customer Name or date range
- 3) Select the customer, select the desired form.



Tablet icon indicates that the proposal is stored on the tablet.



Cloud icon indicates that the proposal is stored in the cloud.



Select the download icon to "pull" the form down to the table. Forms will be saved on the tablet for 90 days (default) after download.

- 4) Changes can be made to a completed form. Be sure to scroll to the bottom of the form to **SAVE** the form to the tablet and the cloud. The software will automatically create a new time date stamped form when changes are saved. The new form will be stored on the tablet and in the cloud with the original job.

5) **DELETE** will remove the form from the tablet and the cloud.

Quality Installation Checklist - Ductless v1.0 Close

< 25 feet

Is there a GFI outlet available within 30 feet of the ODU location?


No  Yes

**Installation Notes**


Enter or dictate installation notes.

**Customer Signature**

I hereby authorize the contractor to begin installation on or about the agreed upon installation date. This authorization includes permission to enter the job site, remove existing equipment, and install new equipment.



**Date of Signature**

 8/29/2018 x

**Customer Notes**

Submit Save Delete