

# AIF USER MANUAL – UPDATES

## 1) Paperless Inspectors Sync

All inspectors that are registered users on the paperless inspector's application can now sync the automated inspector field application real-time and get the latest information. Here are some of the features that can now be synced using AIF home inspection software:

- Inspection order information
- credit card processing information
- pre-inspection agreement status updates
- invoice and balance the inquiries
- inspection status updates

Once the order information is downloaded, the above features will work. If the inspector enters the order on the application direct than the above features will not communicate with the paperless application. Inspector should therefore at all times download order information as part of their inspection process.

To sync with the paperless application, you must have Internet access and the logged in to the system using the login feature as shown in figure 1 below.

**Welcome Colin Howse**  
Saturday, January 16, 2016

**Automated Inspector Field**

**To sync with your account on paperless you must log in.**

Import Database

Please enter Paperless Inspectors username and password to import inspection data

Username: martinsloan  
Password: \*\*\*\*\*  
Import

Note: Please make sure your internet is connected.

Data Uploaded Successfully

Jason Colong	1346 Murray Drive	01-13-2016
Emily Frey	1110 Lauriston Dr	01-14-2016
Veronica Caldwell	6308 Antlers Run Dr.	01-15-2016

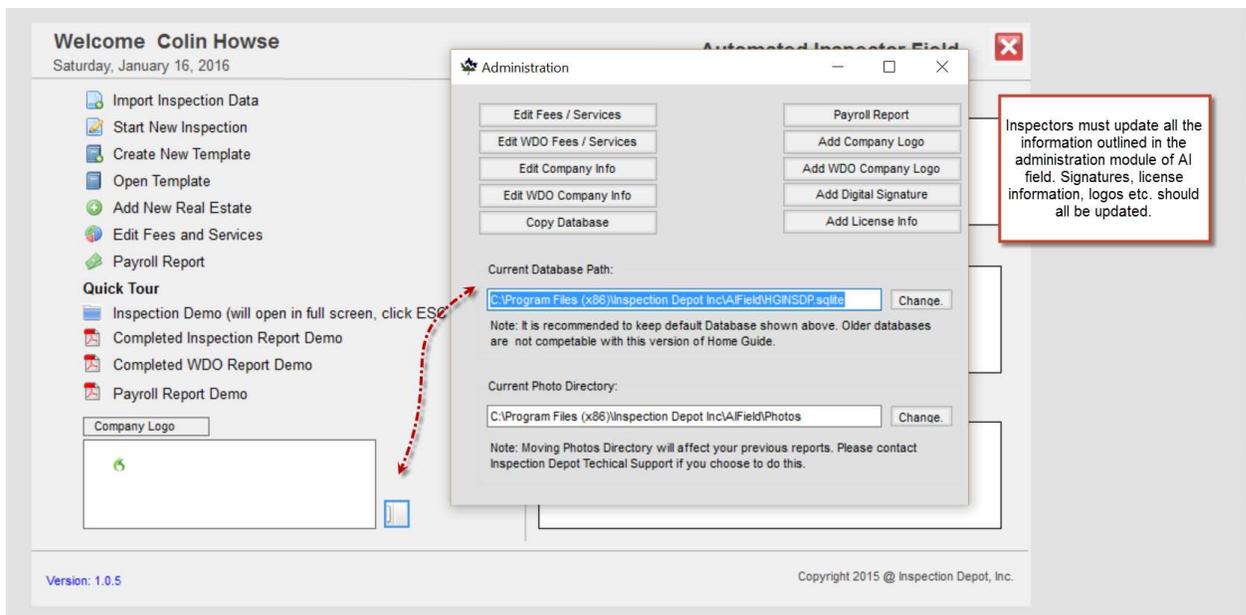
Version: 1.0.5  
Copyright 2015 @ Inspection Depot, Inc.

## 2) Administration Information

If you are new to the AI field application, or you have recently updated your AI field application, you must ensure all the information pertinent to your inspection reports is properly updated in the administration module.

This is a one-time data update but the information updated may be presented in each and every report. It is therefore crucial that you QA all the administration data and ensure it is correct. Properly spelling your name, address, license numbers, signatures etc. are all crucial for the proper completion and presentation of each inspection report.

If you are licensed under a separate WDO company, and all your WDO inspections are presented with their company name and logo, you must update these sections and fields accordingly. Failure to do so will result in inspection reports being delivered with the wrong information. Refer to figure below.



## 3) Dashboard

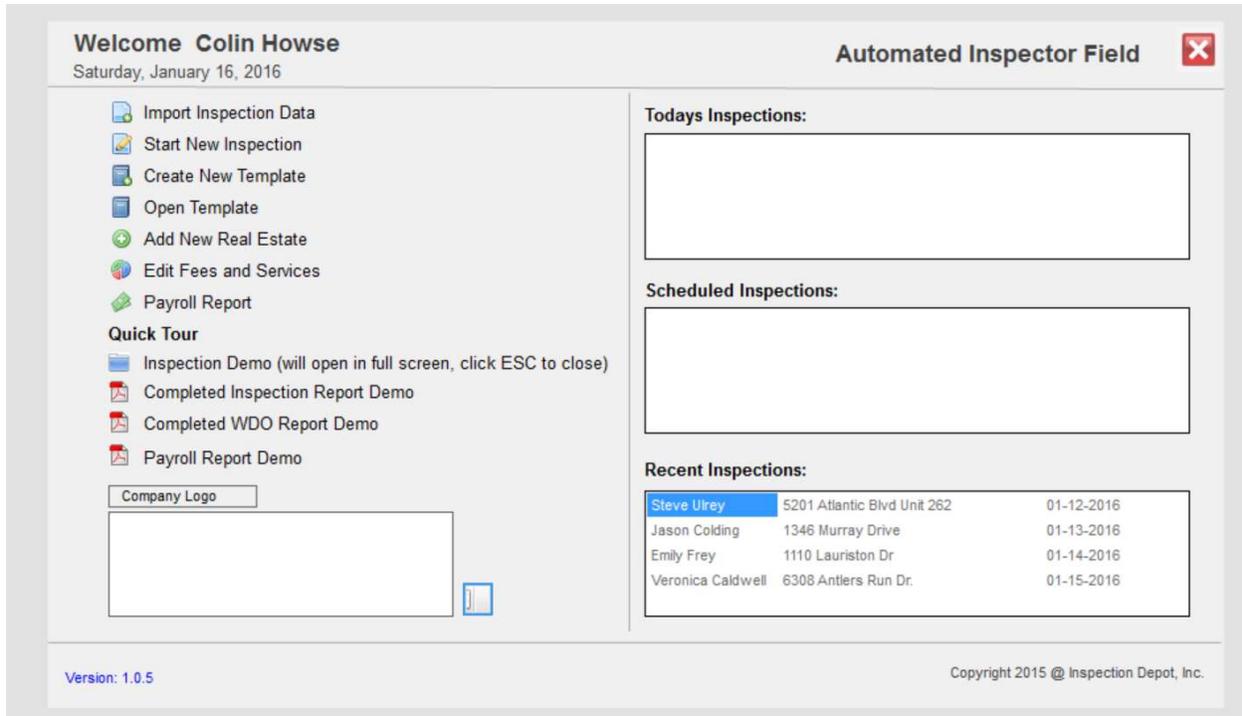
The dashboard has now been updated to include three separate sections for the various stages of inspections in progress.

- Today's Inspections: This area will list all inspections that are scheduled for the current day.
- Scheduled Inspections: This area will list all future inspections that are currently scheduled for you.

- **Recent Inspections:** This area will list all inspections that are not complete and awaiting completion.

Once inspections are complete and finished, they can be found in the search feature on the main menu. It will no longer be available on the dashboard.

To start or edit an inspection simply double-click the appropriate inspection.



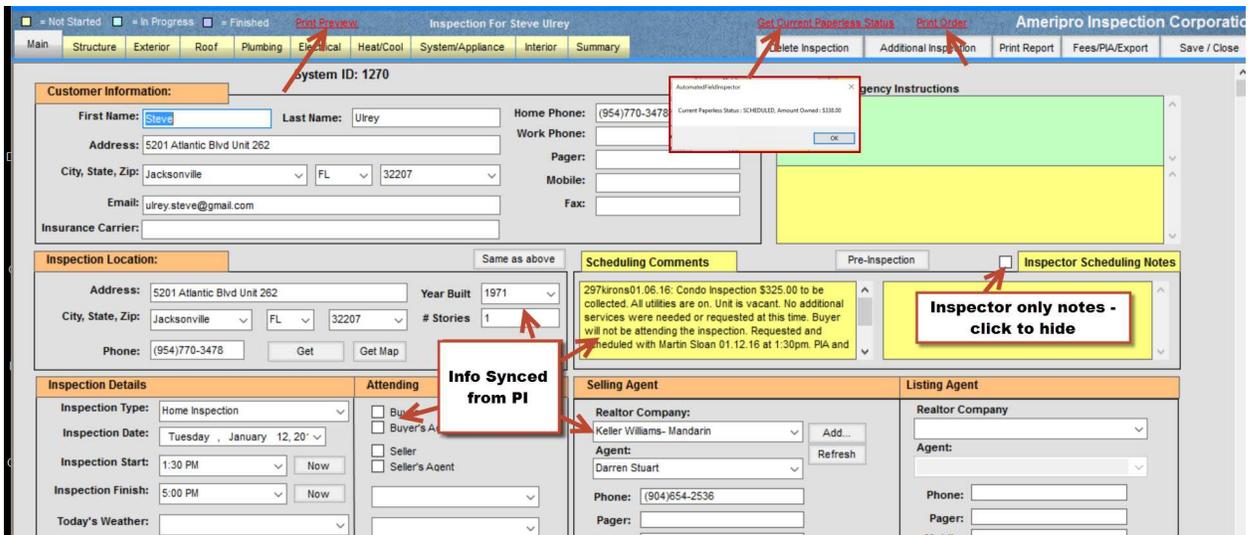
#### 4) Main Inspection Screen

The main inspection page hosts all information sink with the paperless inspectors application, in addition to providing access to the various areas of the inspection report to be complete. Here's an overview of some of the newest features.

- **Inspector only notes:** these are notes provided by the scheduling team that are for the Inspector only eyes. Sometimes your laptop may be available on the kitchen table or counter top and possibly viewable by a third party. Please make sure these are in the hidden mode at all times.
- **Scheduling comments:** these are notes made by the scheduling team in relation to special client requests or information that was discussed during the scheduling process. Please make sure you read this as it may pertain to additional tasks are requirements that you have to undertake. Please call the customer before you leave as an example.

- Pre-inspection agreement: this feature allows you to print the pre-inspection agreement whereby all pertinent information will auto fill as part of the print function.
- Print preview: this link at the top of the main menu from this main page, will allow you to preview the entire report before submitting to paperless for PDF'ing. This way you can make sure that proper QA process takes place before submission, and all information is addressed correctly. Once you start each section of the report, the print preview feature within that section will only show the information relevant to that section accordingly.
- Get current paperless status: this allows you to check current status on the paperless inspectors application in addition to the balance owed. This helps you make decisions as to whether inspection report should be released her to ask for payment at the time of inspection.
- Print order: this provides real-time access to the current order form from the field. This gives directions, updated inspection agreement information in addition to balances.

Inspectors should ensure that the data provided during the sinking process is correct and if not make the necessary corrections. Once made these corrections we sent back to the server and updated on the account accordingly. Please make sure spelling, capitalization and formatting is correct and professional because of the update that occurs on the servers.



## 5) Visible Conditions

The following updates are made to the visible conditions section to help inspectors to speed up their report writing and improve efficiencies. Here's an overview of those changes:

- **VC Defaults:** Inspectors can now create default visible conditions, secondary conditions and associated comments and ratings by using the default radios located on the top of the visual condition section. These default names can be changed by simply right clicking and entering the name accordingly. Inspectors will use these for standard comments in relation to specific homes. Maintenance recommendations on caulking for example, typical shrub clearance, grading, and other maintenance recommendations. While this feature helps inspectors speed up the process, inspectors QA is still a crucial requirement to ensure that the default selections are correct.
- **Comment Box:** Inspectors can now increase the size of the comment box so begin have a larger area to work with. Simply click the maximize button.
- **Ratings:** The ratings on AI field have now changed. Minor defect is not something below \$1000. The major defect is something above \$1000. Please keep in mind that we cannot foretell the true cost of repair because of potential hidden damage. Please use the ? where ever subjective reporting is required.
- **Spell Check:** spell check works off the Microsoft Office spell checking system. You must have a license Microsoft Office system for the work properly.
- **0 Comments:** Zero rated comments are still available but provide extra training information for inspectors about the visible conditions.
- **Adding Photographs:** we have also added additional features to the add photograph ability. Customize captioning is available and must be used properly identify each defect being presented.
- **Photo Editing:** If you double click the uploaded photo from the photo caption box, the photo will open in your default photo editor. Here you can add arrows, circles etc.

# AUTOMATED INSPECTOR FIELD – SYSTEM UPDATES

Visual Condition Comments / Photos

**Right click to set defaults**

Comments and photos added here are at:

Sealants  Stucco  Thermal Save Default

Save time with preselect defaults. You can save a Visible Conditions with secondary conditions, comments and ratings/recommendations and re-use with one click. Make sure you edit and customize to fit each report. Click default number, enter information and click save. Re-use any time.

Primary Condition Edit Conditions

211. Caulk / Seal Door / Window Openings

Secondary Conditions Edit List

220. Moisture Stain(s)

221. Penetrations - Openings: Seal / Repair / Maintain

222. Recent Alterations / Repairs\* / Wood Repairs

Major Condition (\$1000 + Repair)

Minor Condition (\$50 - \$1000 Repair)

Standard Disclosure

Additional Evaluation - Upgrade

Unknown / Subjective Judgement ( ? )

Safety Hazard ( ! )

Include In Summary

Include In WDO

**Custom photo caption**

Photos:

Add Photo Delete Photo

**Opens to larger writing pane**

Comments

Maximize Clear Comments

Exterior caulking and sealants age with time. Those exposed to longer periods of sunlight, east and south elevations, are more prone to faster aging than those with more shelter. The sealants are crucial however as they keep water and moisture from entering your home. Regularly monitoring and maintaining exterior sealants is crucial.

Order	Comment
3	Need to caulk around the outside of several of the windows. Caulking is an ongoing maintenance
3	Incomplete exterior sealants, typical locations include: 1. Garage door weather strips to st
4	Incomplete exterior sealants, typical locations include: 1. Garage door weather strips to st
4	Incorrect caulk noted to _____. Remove and replace with an approved caulking - sealant.
5	Separation noted at rear family room window sills. The adjacent sprinkle head was incorrectly i
5	Incomplete exterior sealants, typical locations include: 1. garage door weather strips to stucco
6	Sealants will require future maintenance.
10	Check historical data with seller.
10	Recent caulking noted to _____. Budget maintenance repairs.
10	Regularly check and maintain exterior sealants.

Note: 0 is Inspector Reference for training purposes. You should edit it to suit your needs.

## Dialog Caption

C:\Users\Michael\Desktop\AIF USER MANUAL

Select Folder

1.jpg  
2.jpg  
3.jpg  
4.jpg  
r2.jpg  
r3.jpg  
r4.jpg  
r5.jpg  
r6.jpg  
r7.jpg  
rangs 1.jpg

Single click on a image to preview or double click to 'IMPORT' it.

Copy Image

Move

No	Image Name	Caption	Edit	Delete
1	e79f663e-dafc-4815-b720-...	211. Caulk / Seal Door / Window Open...	<a href="#">Edit</a>	<a href="#">Delete</a>
2	aedb7bb6-95b4-475a-aaad-...	211. Caulk / Seal Door / Window Open...	<a href="#">Edit</a>	<a href="#">Delete</a>
3	3f10bb0e-3e45-4c05-875e-...	211. Caulk / Seal Door / Window Open...	<a href="#">Edit</a>	<a href="#">Delete</a>

Single click on a image to preview or double click to 'OPEN' it.

**Double Click image name to edit/mark up**

Close

## 6) FEES/PIA/Export Tab

This tab is one of the final areas inspectors will go to finalize the inspection report. It is a most of many features including but not limited to the following:

- i) The current balance outstanding: Once connected to the Internet this tab will direct you to the real-time balance the inspection at hand.
- ii) Payment processing: Payment processing, if completed prior to your submission will update the servers and account within paperless inspectors and enable office staff to keep moving with their tasks. Clients looking for inspections with outstanding balances will be delayed if the balance is still showing even though payment was made in the field. Inspectors need to complete the payment process correctly so that the information online would be updated accordingly.

**Payment Details**

<b>Inspection Services</b> Inspection Fees <input type="text" value=""/> <span style="float: right;">▼</span> Total Additional Service <input type="text" value=""/> <span style="float: right;">▼</span> Discount <input type="text" value=""/> <span style="float: right;">▼</span> Adjectment Plus <input type="text" value=""/> <span style="float: right;">▼</span> Adjectment Minus <input type="text" value=""/> <span style="float: right;">▼</span> Tax <input type="text" value=""/> <span style="float: right;">▼</span>	<b>Fees</b> \$325.00 \$0.00 \$0.00 \$13.00 \$0.00 \$0.00 <hr/> Sub Total <input type="text" value="\$338.00"/> Tax <input type="text" value="0"/> <input type="text" value="\$0.00"/> Total <input type="text" value="\$338.00"/> Total Paid <input type="text" value="\$0.00"/> Balance Due <input type="text" value="\$338.00"/>	<b>Payment Method</b> <input type="radio"/> Cash <input type="radio"/> Check <input type="radio"/> Card Check Number <input type="text" value=""/> Credit Card Type: <input type="text" value=""/> <span style="float: right;">▼</span> Credit Card Number: <input type="text" value=""/> Name on Card: <input type="text" value=""/> Exp Month \ Year: <input type="text" value=""/> <span style="float: right;">▼</span> <input type="text" value=""/> <span style="float: right;">▼</span> Authorization Number: <input type="text" value=""/> Zipcode: <input type="text" value=""/> Amount Paid: <input type="text" value=""/>
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[Click Here](#) In order to edit /add Services /Fees for future reference go to Administration and click edit/Fees

**Note: The following convenience fees apply to credit card payments:**

1. Visa/Mastercard 3%
2. Diners/AMEX 4%

Please makes sure all feedback relating to payment issues and changes are fully outlined in the feedback box below.This information is crucial to prevent any delays in payroll processing.

Feedback Comments :  Action Needed

- iii) Credit Card Processing: AI field payment processing is directly connected to the credit card merchant services account. You will receive an authorization and confirmation, and AI field, the invoice and the paperless inspectors application will be updated accordingly. This is also integrated into QuickBooks which in turn is also updated at the same time. By using this feature we do not need to store credit card numbers or create insecure processes. If processing a credit card, a zip code is REQUIRED.
- iv) PIA status and acceptance confirmation: The status of the PIA if nobody's present at the inspection will dictate what are you released a report or not. If you have an Internet connection this will give you the current status online and enable you to make the necessary notes while submitting your inspection report.
- v) Inspection report upload and submission: once the inspection report is submitted in PDF you will then be required to upload it into the system using the upload feature. This will occur once you prove the report and are content that you have covered all aspects of the inspection at hand.
- vi) Additional inspection report uploads and submission: this feature is for uploading the additional inspections conducted at the same time as the main home inspection. These may be a WTO inspection, a four point inspection, a wind mitigation etc. Once the PDF is finalized and approved, your free to upload into the system accordingly.
- vii) Feedback comments and instructions to the office staff and schedulers: also many reports you must choose a selection from the drop-down and make necessary notes to the office if in fact tasks are still outstanding. If everything is okay and there is no update to the office simply state so during the submission process within this comment box.

**Pre-Inspection Agreement (PIA)** Pre-Inspection X

PIA Status : Accepted and Received from Client.

Upload PIA :  [View](#) [Delete](#) Accepted By : Steve Ulrey  
IP Address : 162.232.98.167 Date : 07 Jan 2016

**Upload Reports** Current PL Status : SCHEDULED

Report Name : Home Inspection

Upload Report :

to add more report(s)  to delete report(s)

**Feedback Comments** **Action Needed** DO NOT RELEASE RE v

Please complete all additional office only feedback notes for customer service representative attention. Make sure all task items are clearly described in your feedback. Additional information such as client feedback, or liability concerns should be outlined here also if applicable.

There is no PIA on this file, and I cannot get hold of the client. He did not attend the inspection. Please follow up and close out.

viii) Feedback comments to the accounting department for payroll and utter invoicing – payment tasks: if there is any special circumstances in relation to your payment are dependent the field such as discounts etc. please make sure these are clearly identified within this payment comment box. This be viewed during the payroll process.

future reference go to Administration and click edit/Fees	Total <input style="width: 80px;" type="text" value="\$338.00"/> Total Paid <input style="width: 80px;" type="text" value="\$0.00"/> Balance Due <input style="width: 80px;" type="text" value="\$338.00"/>	<p><b>Note: The following convenience fees apply to credit card payments:</b></p> <ul style="list-style-type: none"> <li>1. Visa/Mastercard 3%</li> <li>2. Diners/AMEX 4%</li> </ul> <p>Please makes sure all feedback relating to payment issues and changes are fully outlined in the feedback box below. This information is crucial to prevent any delays in payroll processing.</p> <p><b>Feedback Comments :</b> <span style="float: right;"><b>Action Needed</b> Debbie Alert <span style="border: 1px solid gray; padding: 0 5px;">v</span></span></p> <p>Debbie, there was an additional building. I charged \$95 more. I also did the crawl space for free.</p> <p style="text-align: right;"><input type="button" value="Save and Send To PL"/></p>
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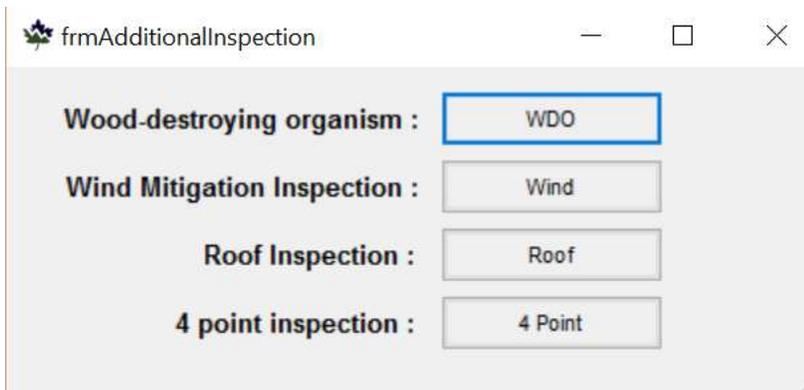
## 7) Additional Inspections

We have now incorporated the following its additional inspections into the AI field application. These are as follows:

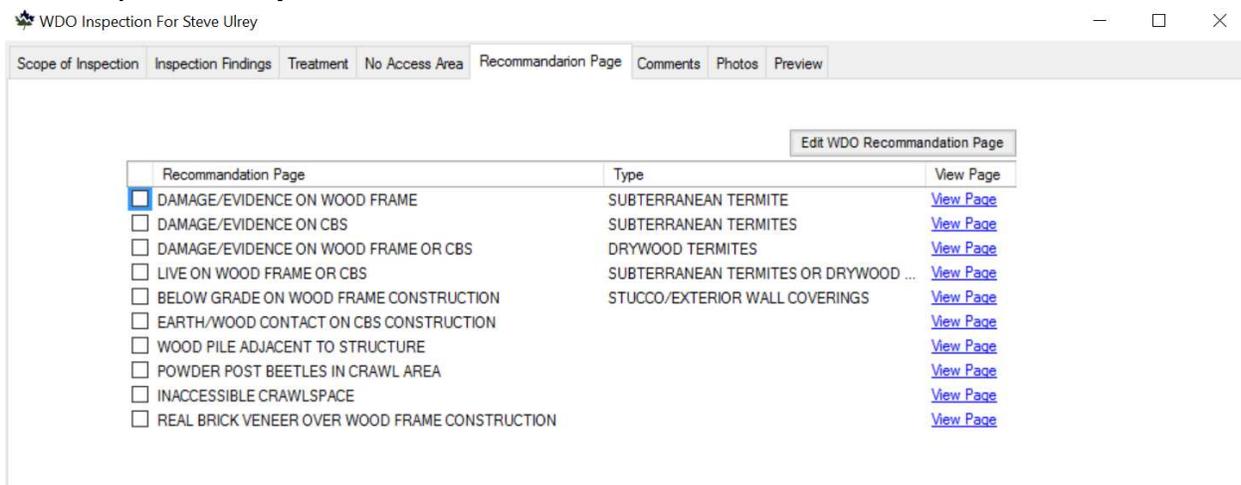
- Wood destroying organism inspection with recommendation pages
- Wind mitigation inspection
- Roof inspection
- Four point inspection with water heater information

Data entry is now only once and inspectors can fly through additional inspections with little time.

To create any of these inspections simply click the relevant button and start.



### 1) WDO Report:



## 2) Wind Inspection Report

Building Code	Roof Cover	Roof Wall	Opening Protection	Photo Upload	Preview
Roof Cover Predominant	2.1 Roof Covering Type	Permit Application Date	FBC or MDC Product Approval #	Year of Original Installation or Replacement	No Infor. Provided for Compliance
<input type="radio"/>	<input type="checkbox"/> 1. Asphalt/Fiberglass Shingle	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	<input type="checkbox"/> 2. Concrete/Clay Tile	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	<input type="checkbox"/> 3. Metal	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	<input type="checkbox"/> 4. Built Up	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	<input type="checkbox"/> 5. Membrane	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="radio"/>	<input type="checkbox"/> 6. Other	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Roof Cover		<input type="text"/>	<input type="button" value="Save and Next"/>		

## 3) Roof Inspection – Citizens Form

Roof Inspection- Inspection For Steve Ulrey

Certification Information Photos [Print Preview](#)

Roof Covering :

Approximate remaining useful life of the roof :

Age of the roof (in Years) :

Date Last Updated ?

what, if any, Updates were completed ?  Full Replacement  Partial Replacement

Are there any visible signs of damage/deterioration (Such as curling/lifted/loose/missing shingles or tiles, Sagging or uneven roof deck, etc..)?  Yes  No

Are there any visible signs of leaks ?  Yes  No

Feb. 23, 19

### 4) 4 Point Inspection

Electrical System | Heating System | Plumbing System | Roof | Water Heaters | Photo Upload | Preview

Age of Main Panel:  Year Last Updated:

**Wiring Types:**
 Romex, BX or Conduit
  Active Knob and Tube or Cloth wiring
  Aluminum
   
 Other

**Main Panel Amps:**
 Less than 60A Fuse
  60A Fuse
  100A Fuse
  100A CB
   
 200A CB
  Other

Total Amps:

**Panel 2#:**
 Less than 60A Fuse
  60A Fuse
  100A Fuse
  100A CB
   
 200A CB
  Other

**Hazards Present**
 Blowing Fuses or Breakers
  Empty Breaker Sockets
  Loose Wiring
  Improper Grounding
   
 Over Fusing
  Hazardous Panel
  Double Taps
  Exposed/Unsafe Wiring
   
 Other

Is Electrical system is good in working order ?
  Yes
  No
 Explain

If single strand(aluminium branch) wiring provide details of all remediation. Separate documentation of all work must be provided and certified by a licensed electrician.
   
 Entire Home rewired with copper
   
 Connections repaired via COPALUM crimp
   
 Connections repaired via AlumiConn

8)