HouseMaster | CLOUD

Setup and Dashboard Usage Guide

Beta Version 1.6
(Revised 7.7.2017)

© 2017 HMS LLC

TABLE OF CONTENTS (Content and Pages Subject to Change)

PART I THE HOUSEMASTER CLOUD

A. Introducing CLOUD..... 3
B. CLOUD Features 5

Part II BASIC SETTINGS & FUNCTIONS

A. Getting Started 11
1. Setting Up an Account
2. Completing registration
3. Add a Home
4. Setting Up an Office Account
B. Profile Info & Settings 14
1. Personal Data
2. Report Delivery Default Settings
3. Notification Default Settings
4. ISN Integration
C. Connecting to the CLOUD for Uploads 16
1. Changing Computer Registry
2. Associating Inspectors with an Office
D. Using HG Companion with the CLOUD 19
1. Integrating with HG companion
E. ISN Integration 21
1. Integrating with ISN
2. Report Delivery Settings in ISN
F. Creating Customer & Agent Accounts 23
1. Creating Usernames & Passwords
2. Creating a Personal Agent User Accounts
3. Adding an Agent Photo
4. Company Settings
G. Providing Report Access..... 25
1. Setting up Webpage
2. Changing Report Access Link
3. Giving Permission for Report Access
4. Report Delivery Key
H. Uploading Reports 28
1. Uploading Inspection Reports
2. Uploading of Additional Documents.
3. House Picture
4. Reports to ISN
I. Email Notifications 30
1. At Account Creation
2. At Upload of Report
3. At Upload of Additional Documents
4. Satmetrix Surveys
J. Event Status Tracking 32
K. Appliance Data Recording 32
1. Uploading Data
2. Appliance Age Notification
3. Recall Notifications
L. Adding CLOUD to Mobile Devices 37
1. Adding to an Android Devices
2. Adding to an IOS Devices
M. Support Contacts..... 38

PART III – THE DASHBOARD

A. Dashboard Menu Items 39
B. My Reports 39
1. Search for Reports
2. Show or View Reports (Access Options)
3. Edit Report Access
4. Add Attachments
5. Report View
C. My Customers..... 45
1. Search Users (Customers)
2. Impersonate User
3. Send New Customer
4. Check Email Status
5. Exit Impersonate
D. My Agents..... 49
1. Search Users (Customers)
2. Impersonate User
3. Show (List of Homes)
4. Select Agent's Report
5. Edit Agent Profile
6. Send New Password
7 Check Email Status
8. Exit Impersonate
E. My CLOUD Transfers 53
1. Transfer Reports to CLOUD (from PCX-HG)
2. View List of Transferred Reports
3. Download Report from CLOUD
4. Transfer Report from CLOUD (to PCX-HG)
F. Company Directory 56
1. Franchisee, Office Staff, Inspectors
2. Report Management Options
3. Search for Reports
4. Add a New Company User
G. Company Settings 58
1. Office Setting
2. Inspector Default Settings
H. Company Reports 61
1. View List of Reports
2. Report Management Options
3. Search for Users.
4. Add a User
H. Company Customers 63
1. Customer List
2. Search for Customers
3. Customer Account Management.
I. Company Agents 64
1. Agent List
2. Search for Agents
3. Agent account Management.
J. Today's Appointments 64
1. Appointment List
2. Add a Appliances
3. Cellphone View

PART IV

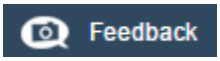
FAQs 67

HouseMaster CLOUD Beta Guide 1.5

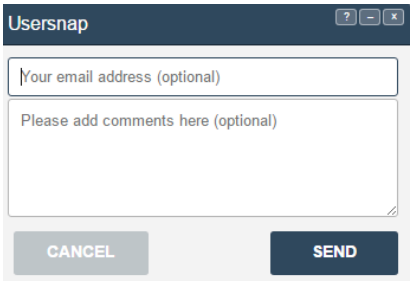
This guide has been prepared to help HouseMaster franchisees set-up a CLOUD account and become familiar with the major features of the HouseMaster CLOUD. Part I provides a brief introduction to the CLOUD features. Part II reviews basic set up and customization information. Part III reviews the details of the CLOUD Dashboard – the features that will be used most often on a day-to-day basis, including company office settings, CLOUD transfers and; report management; and Part IV includes FAQs.

Note: HouseMaster CLOUD is in expected to be in open Beta until the Fall 2017. All features are subject to ongoing change, even on a daily basis, as new features are added and issues are addressed. Consequently, information provided in this guide may not be in sync with the current program features. Updates will be posted periodically.

Feedback is welcome. At the lower right corner of each screen, there is a feedback button.



Please provide details on any issues, errors, and suggestions by selecting this button and completing the form that opens. Screen shots, highlights and notes can be included.



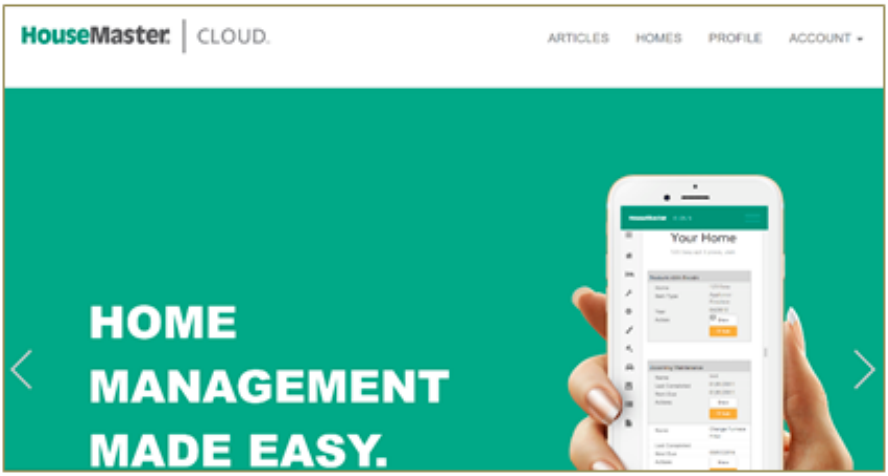
PART I
HOUSEMASTER CLOUD

A. INTRODUCING HOUSEMASTER CLOUD

HouseMaster CLOUD is a web -based home management platform designed to help homeowners "manage everything home," starting with their home inspection.

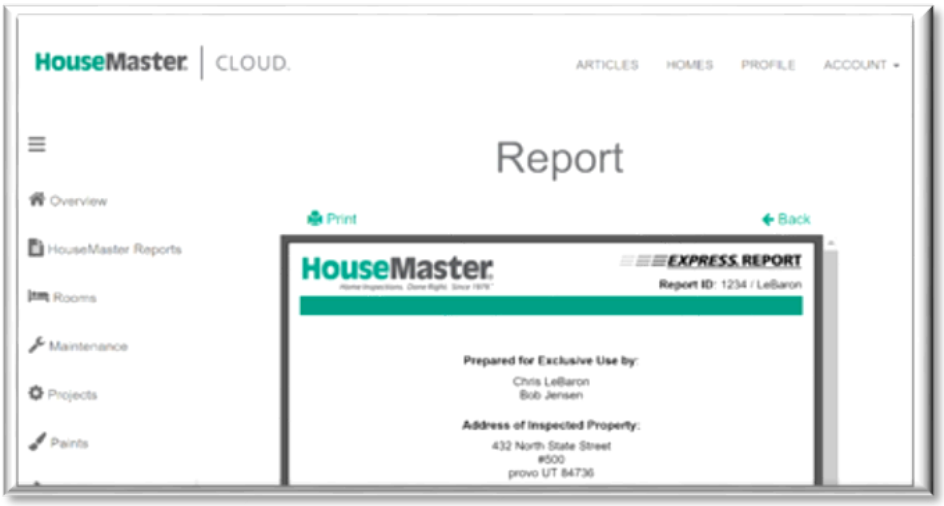
HouseMaster Franchisees have consistently established themselves as trusted advisors to their customers. HouseMaster Home Inspectors provide a reliable source of education and assistance in helping home owners understand their home's condition as well as the value and need for ongoing maintenance. The success of the HouseMaster Concierge and Buyer Benefits Programs establishes overwhelmingly that HouseMaster customers respond to the offers of additional assistance and resources we provide.

HouseMaster CLOUD takes this post-inspection assistance to a whole new level! It gives HouseMaster the platform to build on the success of the Buyer Benefits Program and add many more tools to help home owners manage and enjoy their new home. The HouseMaster CLOUD is the foundation upon which we will continue to grow the lifetime value of every HouseMaster customer.



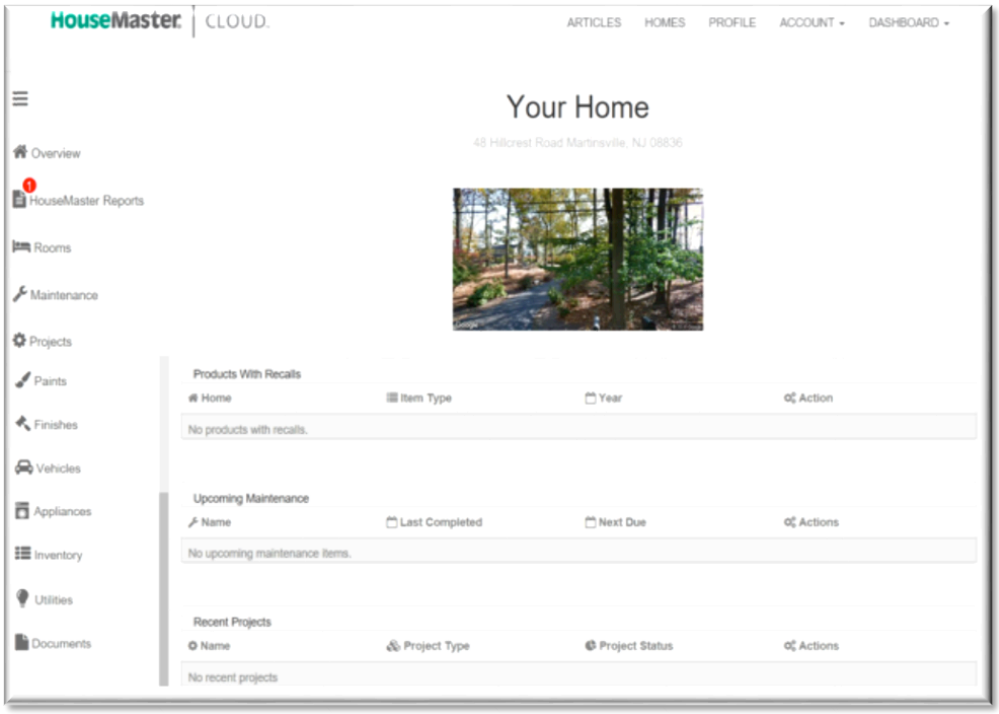
The HouseMaster CLOUD, when utilized to its fullest, provides an efficient report upload and management process for franchise offices and a unique report delivery and home management experience for customers and associated agents.

HouseMaster offices will be able to create a HouseMaster CLOUD account for each customer concurrent with an inspection order or upon the upload of an inspection report. Once logged in, HouseMaster customers will be directed to their own personal CLOUD account where their reports will be found, and then the journey to homeownership and management can continue!



B. HOUSEMASTER CLOUD FEATURES

There are many features of the HouseMaster CLOUD that will benefit franchisees and customers and associated agents. HouseMaster Franchisees will be able to upload inspection reports and documents, track and manage report delivery, customer and agent data, and other informtion. Customers will not only be able to retrieve their inspection reports, lab results and other documents via the CLOUD, but will use be able to use its features to manage their home by keeping track of home finishes, listing maintenance needs and projects, recording appliances purchases, and saving important documents. They will also receive a monthly newsletter, and product recalls notices, and will have access to special offers and more – all at no cost to them.

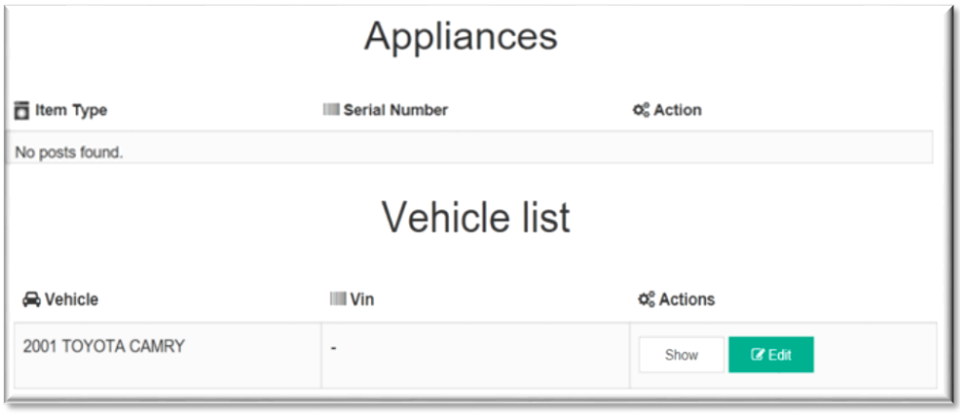


- **Report Delivery**

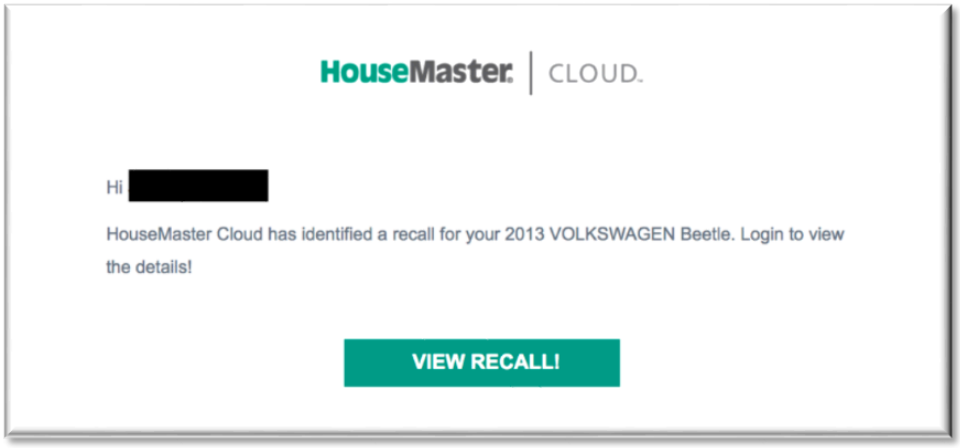
  HouseMaster CLOUD provides a new means of delivering inspection reports, lab results and other documents to Customers and Agents, while also giving them access to many additional CLOUD features to help them manage their home and save money.

- **Recall Notices: Appliances, Household Products, and Vehicles**

  HouseMaster CLOUD will provide customers with valuable information on safety recalls for appliances, many other household products, and vehicles. HouseMaster Inspectors can record appliance information obtained during the inspection. The HouseMaster CLOUD will search various databases to identify any recalls. Customers will be able to add details on new appliances and other products to their HouseMaster CLOUD account, including baby products and electronics.



Customers will get alerts when a recall associated with a recorded appliance, product or vehicle is identified, as well as monthly newsletters summarizing recalls and providing other information.



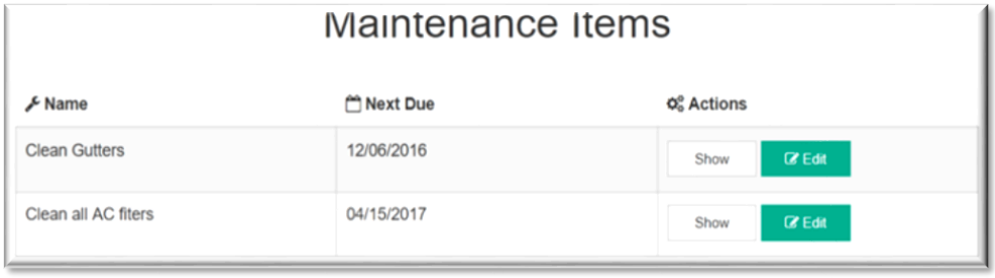
- **Product Purchases**

  As HouseMaster CLOUD evolves, customers will be able to place orders for various household products. The first purchase option in development is for filters – for heating and cooling systems and other household devices. Filter replacement is one of the easiest and yet often overlooked maintenance task that most homeowners can perform to improve efficiency and extend the life of heating and air conditioning equipment and other items.

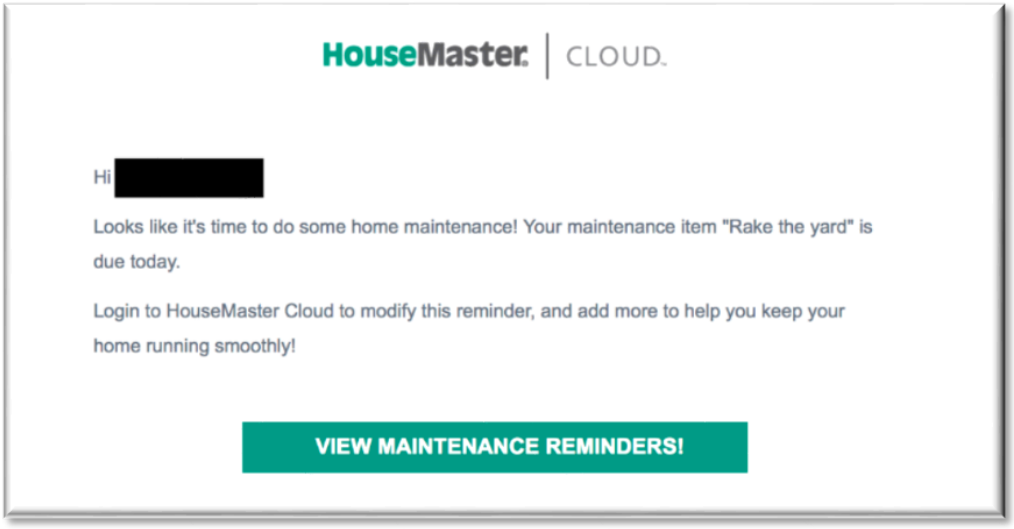
  Unfortunately, most home owners don't take the time to do this simple chore. With HouseMaster CLOUD, there are no more excuses. Homeowners will be able to record filter details (sizes, etc.), set reminders to change filters, and even order replacement filters through the HouseMaster CLOUD.

- **Maintenance Reminders**

  Customers will be able to create and maintain maintenance logs to help them know what and when they need to do to complete the maintenance in their home.



They will also receive regular maintenance tips and reminders, including seasonal checklists.

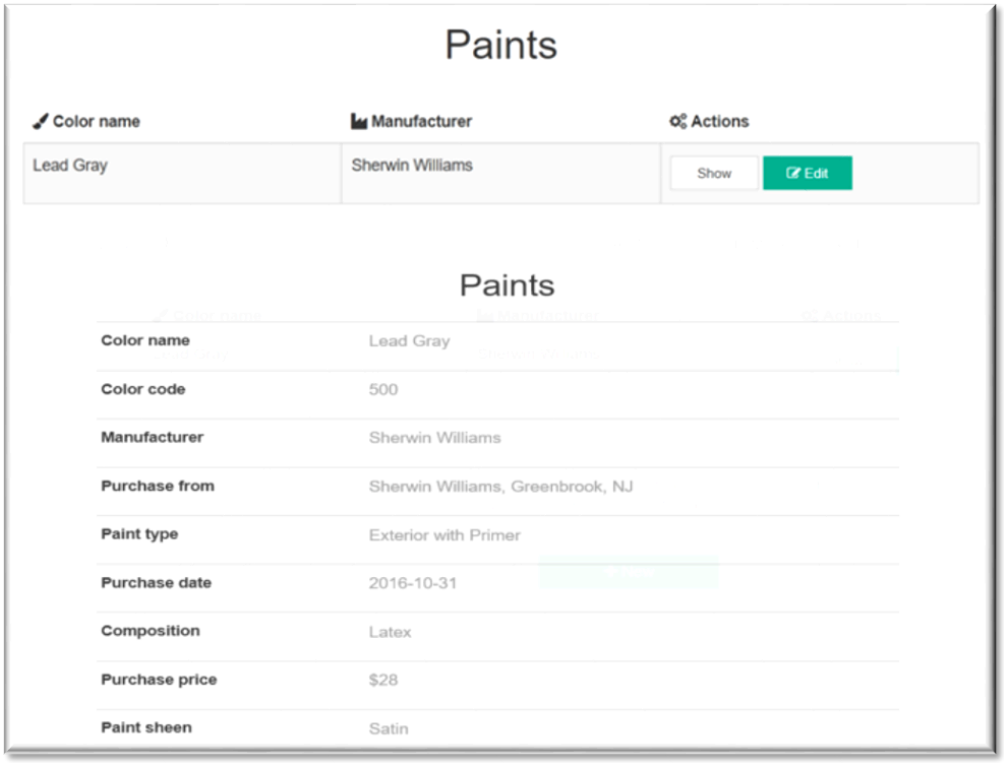


- **Project Management**

  HouseMaster CLOUD will assist home owners in managing their home repair and improvement projects. Project plans, contractor contacts, receipts, before and after pictures, and warranties can all be uploaded to the HouseMaster CLOUD for storage and future access. This feature will also provide an easy way to document major improvements and costs for tax-deduction benefits when the home is sold. It will also be an ideal way for sellers that make needed repairs prior to a home sale to provide documentation to homebuyers.

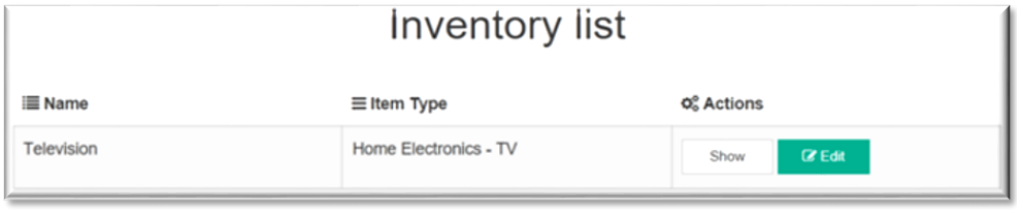
- **Paint Colors and Finish Materials**

  Identifying paint colors and other house-finished details can be a big frustration when looking to touch up areas or re-decorate. This will no longer be a struggle for HouseMaster customers with a HouseMaster CLOUD account, as they will be able to record material types, brand names, colors and styles for carpeting, wall paper and much, much more. And HouseMaster even goes one step further. With a new HouseMaster relationship with Sherwin Williams, home owners will not only be able to manage their color choices, but can take advantage of an exclusive discounts on Sherwin Williams products available through the Buyers Benefit Program.



- **Home Inventory**

  Apps and services to help homeowners keep inventory and keep track of their belongings for insurance purposes are in high demand. With the HouseMaster CLOUD homeowners do not need to pay for a separate service or app. To help home owners document their belongings, the HouseMaster CLOUD allows them to record information on the contents of their home, making the filing of an insurance claim, if needed in the event of a disaster, as trouble-free as possible.



- **Agent Information**

  As a perk to the real estate agents who may have introduced HouseMaster to our customer, the HouseMaster CLOUD will store the agent's name and contact information for as long as the account is active (minimum 5 years). What does this mean to the agent? HouseMaster CLOUD helps keep the agent front and center and serves as a constant reminder of the added value they brought to their customers through the home-sale process.

- **Buyer Benefits Offers**

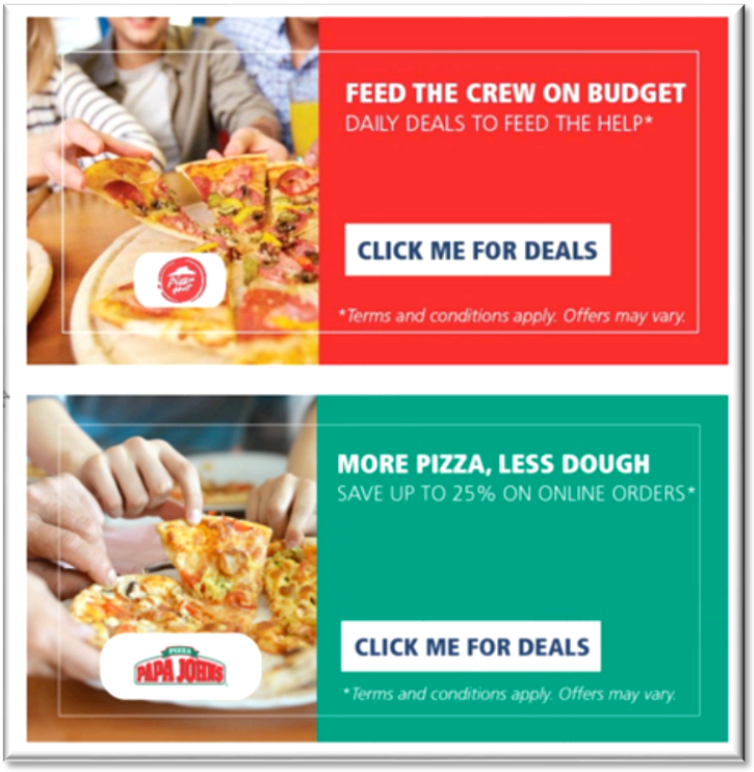
  HouseMaster CLOUD will be able to deliver Buyer Benefit reminders and promotions via alerts banners, reducing any friction for customers to participate in offers. It eliminates the hassle over questionable emails and spam, and gives HouseMaster customers the ability to participate and enjoy new services and offerings as they are implemented. Expanding the reach of the Buyer Benefits Program through the coordinated use of various customer touch points will further increase already astronomical engagement rates with users.

- **Monthly Newsletter**

  A Newsletter notice will be sent to all users on a monthly basis when they confirm the associated option in their profile settings. This newsletter contains several brief articles of interest for customers (home buyers, homeowners) and agents**.** If a customer has multiple homes saved to CLOUD with multiple agents, the newsletter will only include the last agent to work with the Customer.

- **Ongoing Access to BBP Coupons**

  A new addition to the CLOUD and Buyer Benefits Program menu now allows Customers to access the available coupons. They will still get email notifications about the BBP, but once they have an account this feature will be available at any time. Clicking on “Other” in the r left side menu will bring up coupons like the sample below.


FEED THE CREW ON BUDGET
DAILY DEALS TO FEED THE HELP*
CLICK ME FOR DEALS
*Terms and conditions apply. Offers may vary.
MORE PIZZA, LESS DOUGH
SAVE UP TO 25% ON ONLINE ORDERS*
CLICK ME FOR DEALS
*Terms and conditions apply. Offers may vary.

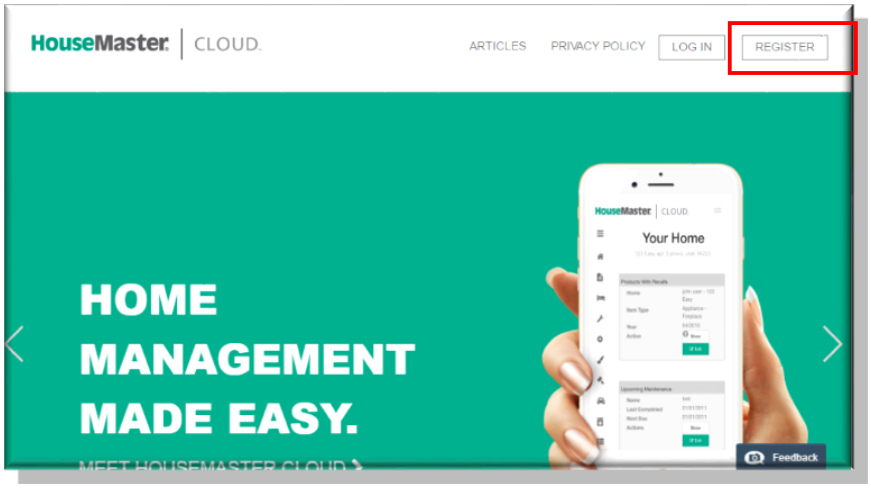
PART II
BASIC SETTINGS & FUNCTIONS

A. GETTING STARTED

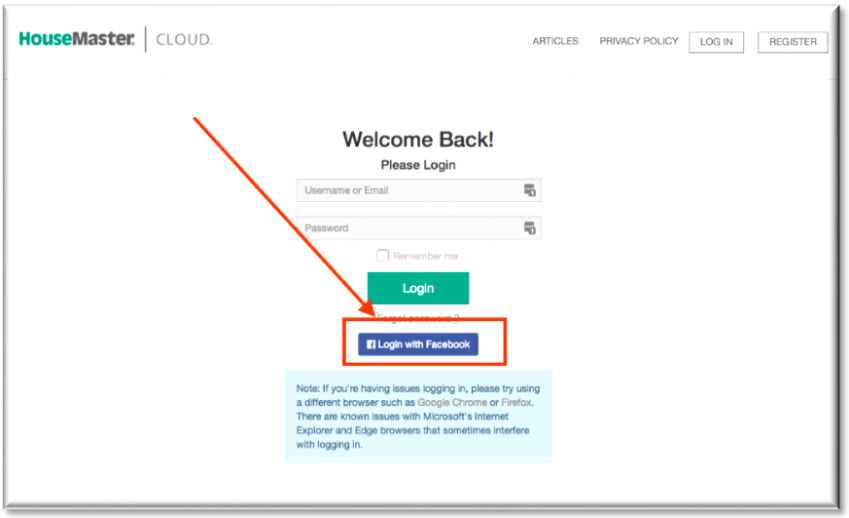
Note: CLOUD works best on Chrome or Firefox; the use of Internet Explorer is not recommended due to potential formatting issues.

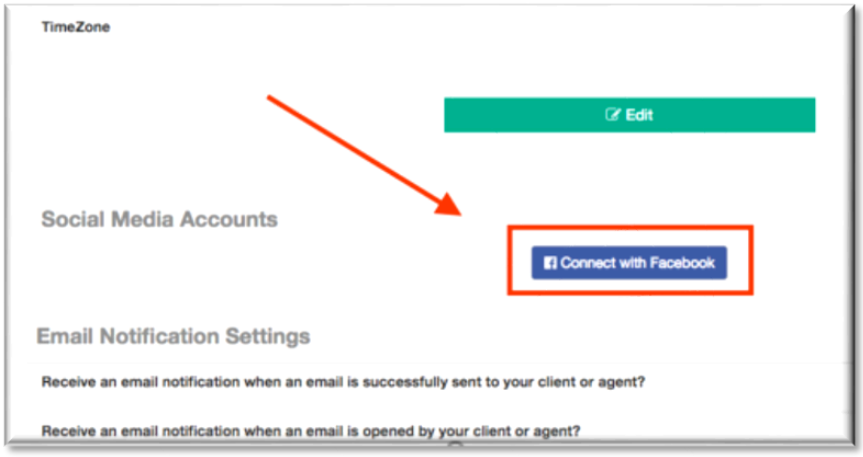
1. Setting up an Account on the HouseMaster CLOUD

To start the creation of a HouseMaster CLOUD account for a franchise office, go to https://CLOUD.housemaster.com to register.



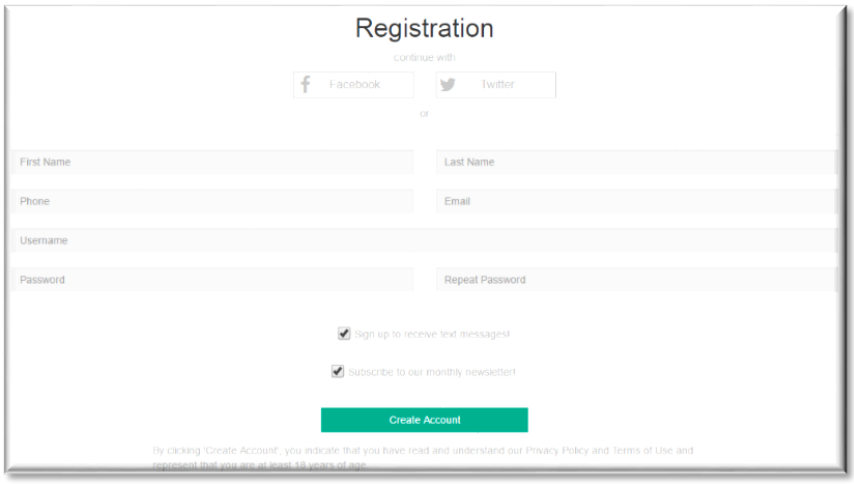
After an acount is setup following the steps below, and a user name and password provided, you will be able to log in to CLOUD by going to CLOUD.hosemaster.com or facebook.com. To use the facebook link, click the "Login with Facebook" button on the login page. Please note however that if your Facebook email address is different than the email address you're logged in on HM Cloud with, you'll need to login to your account with your username & password, go to the "Profile" page and click "Connect with Facebook" and then you'll be able to use the "Login with Facebook" button on the login page for future logins.





2. Completing Registration

Once in, fill out the form with your personal information and select a username (your email address) and password. You can also sign up to receive text messages and periodic emails through CLOUD.

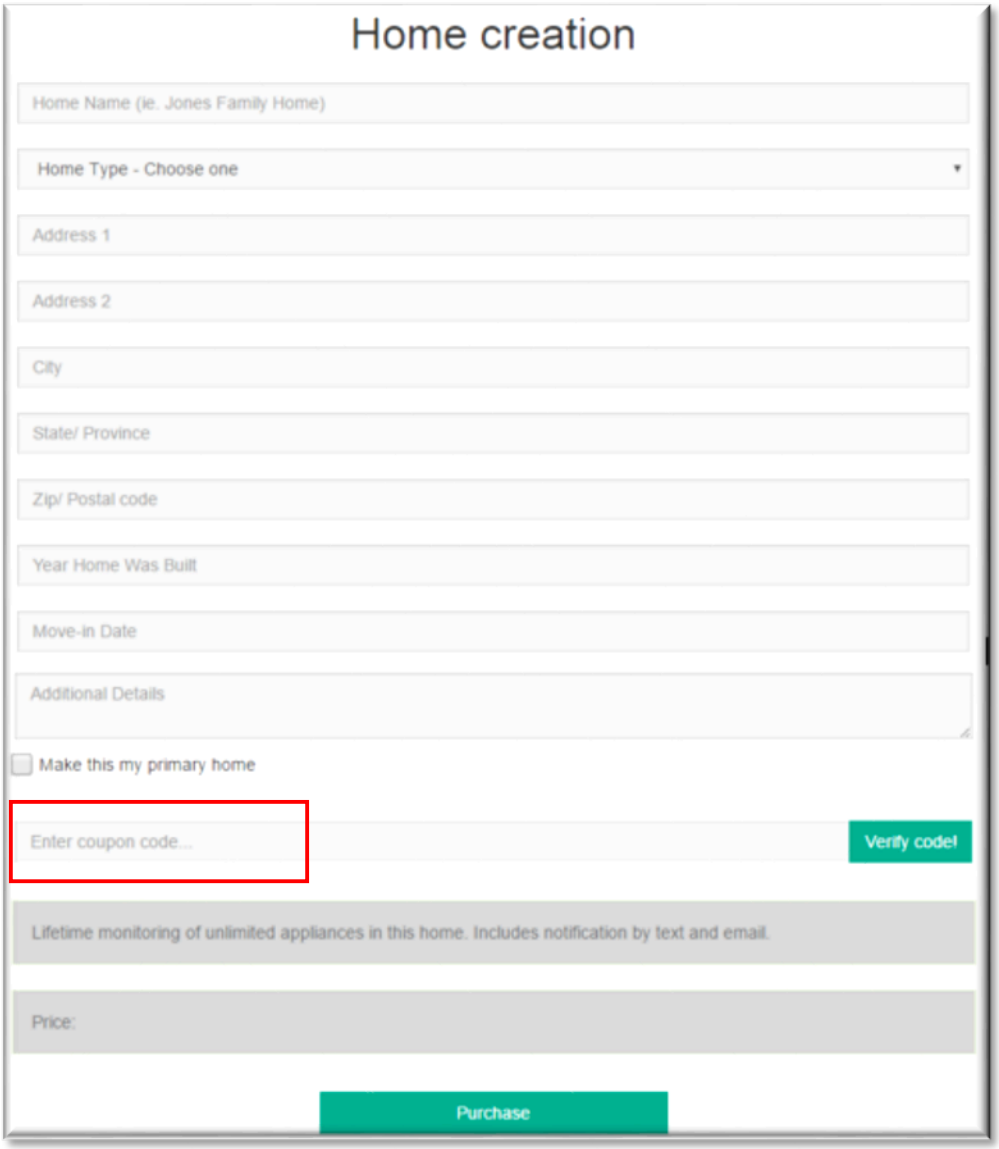


Next, select "Create an Account" to open the screen below, which will allow you to record information for your own home. In the field labeled "Enter coupon code" type in "FREE" and select "Verify Code. This will fill in the Price field with $0.00 allowing you to select "Submit" to move ahead.

Note: Office managers and franchisees can also a home for free for agents without using a coupon code. The fee and price fields are only included to address future offerings of the HouseMaster CLOUD to the general public where they will be able to pay a fee or use a supplied coupon to register for free or a discount.

3. Adding a Home

If desired, now or later, you can create a file for your own home by clicking on the HOMES menu link to open the fillable form below.



Once the account and home information is provided, users will be able to go to ARTICLES to review peridic posts of interesting information; HOMES to review information about the recorded home(s); PROFILE to edit account information; and ACCOUNT to change passwords or log out.

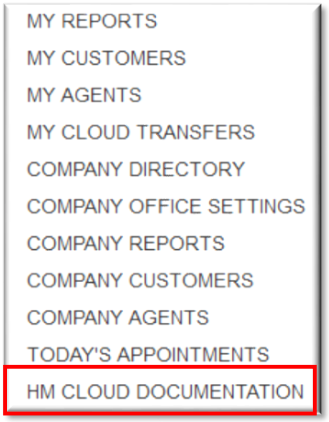
There is another features of the CLOUD and that is the DASHBOARD, where the day-to-day functions related to management of reports, offices default settings and other feature are found.

4. Setting up an Office (Franchise) Account

Once an individual account has been created, contact CLOUDsupport@housemaster.com to setup an appointment to get onboarded to the CLOUD as a franchisee and set up an account for the office. After an offices account is created, when logging in again, the DASHBOARD will appear on the menu.

5. The Dashboard and CLOUD Usage Guide

The Dashboard allows an office to view and manage all company uploaded reports, customers, agents account and appointments. A CLOUD Usage Guide can also be accessed from the the "HM CLOUD DOCUMENTATION" link in the Dashboard menu.

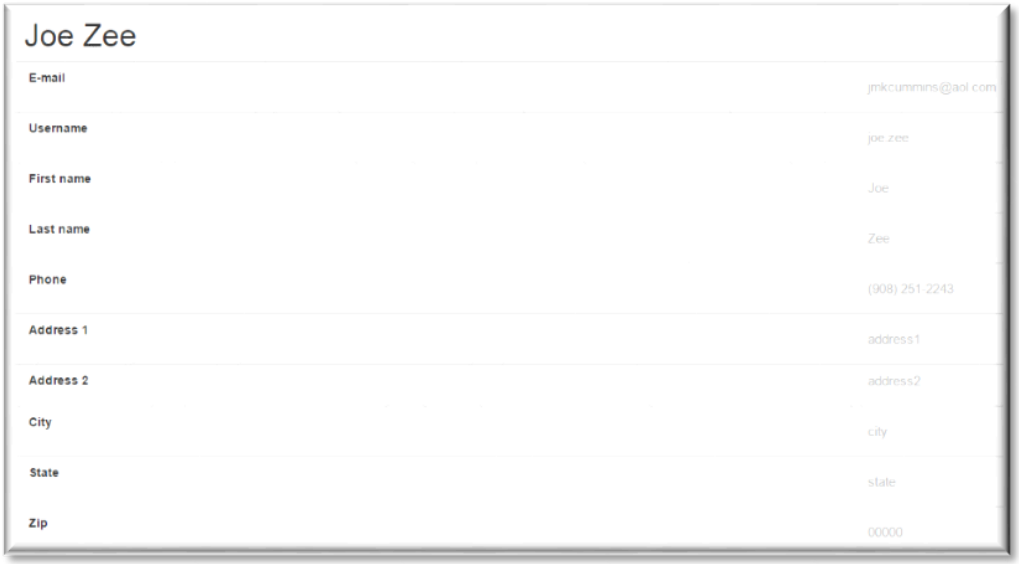


Before we review the other Dashboard features in more detail, the office profile and some default settings need to be set.

B. PROFILE INFORMATION & DEFAULT SETTINGS

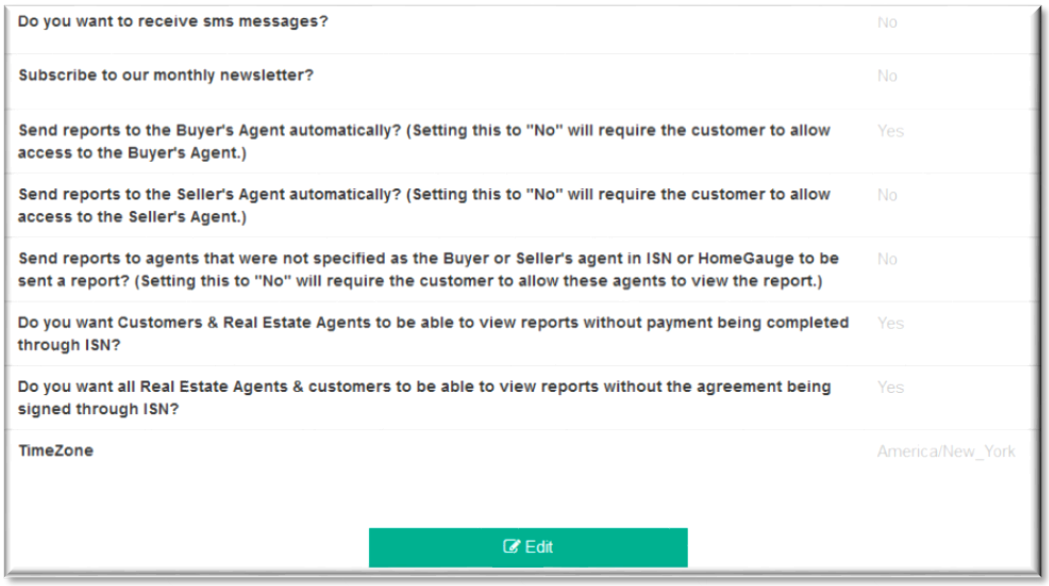
Personal and office information needs to be added and default settings selected to address report delivery options and event notifications. The appropriate default settings must be entered for the company, with each inspector also setting defaults under their own account profile. Several company default settings can be set to over-ride individual inspector settings. These settings options are explained in more details in Part III- the DASHBOARD.

1. Basic personal information



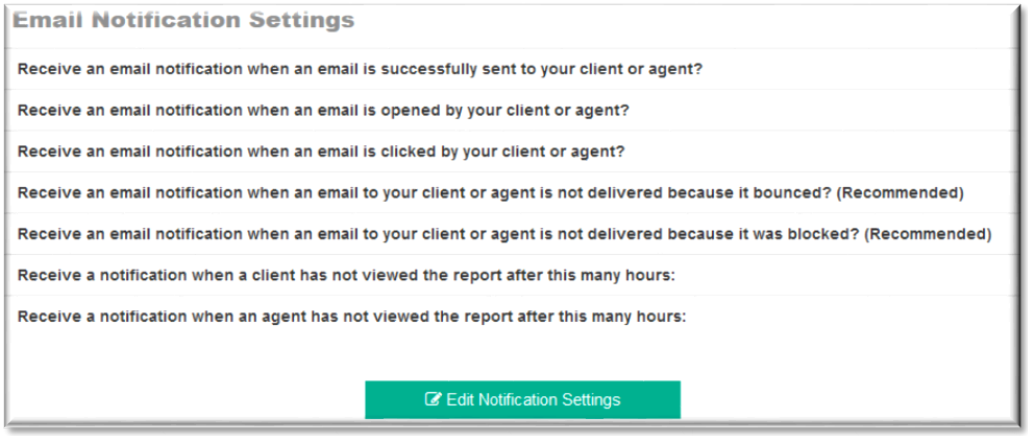
2. Report Management Default Settings

PROFILE settings also provide direction for how CLOUD handles the various report management and delivery functions. The appropriate settings must be set under each inspecto'rs Profile. Default settings can be overwritten on a per report basis once a report has been uploaded.



3. Event Notification Settings

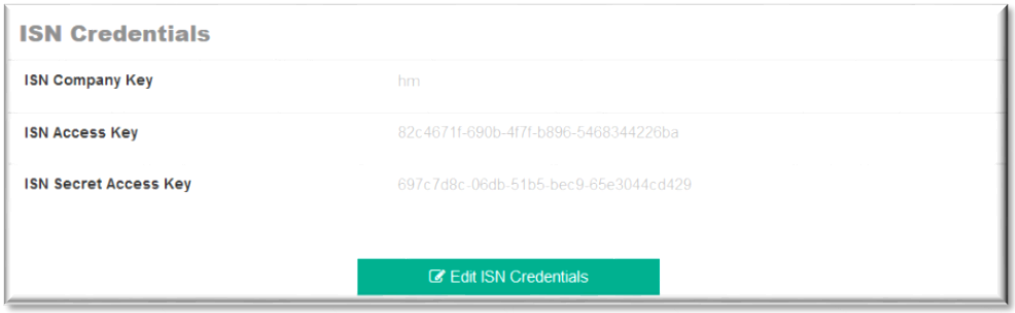
Several options are also available under PROFILE to set event notifications. Once again, these must be set under each Inspector's Profile, as they related to Inspetor specifc actions and notifications.



Note. See Part II, Section 4 for an explanation of the email notifications to Inspectors related to the status or the email notifications sent to Customers and Agents.

4. Inspection Support Network (ISN) Integration

To be able to download Customer and Report data to CLOUD and upload PDF copies of reports to ISN, the ISN acount keys must be added to a franchisee's profile and the profile of each Inspector associated with the office.. See Section E. for more details on ISN Integration.



C. CONNECTING TO CLOUD FOR REPORT UPLOADS

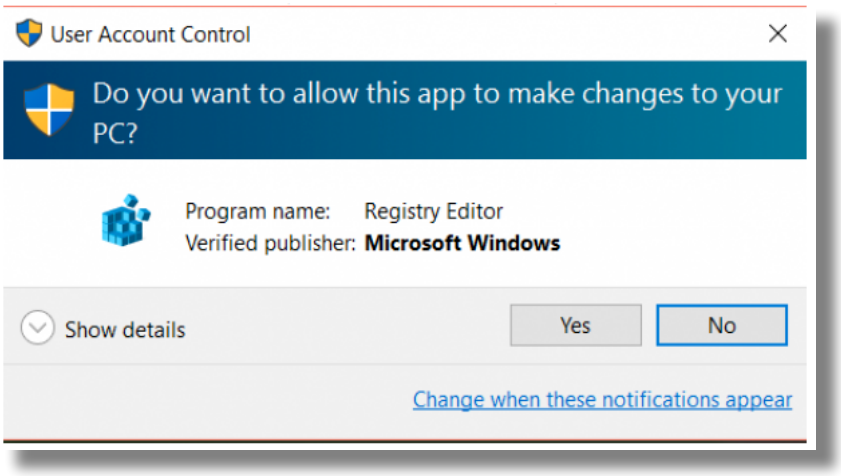
In order to upload report files to the HouseMaster CLOUD, changes must be made to the Windows registry for each computer used to upload reports.

Note: *Once registry changes are made to a computer previously used to upload reports to the HomeGauge through the HouseMaster Report Management System, it will no longer be possible to connect to the HomeGauge Dashboard to upload or manage reports from that computer – all future uploads will go to the HM CLOUD and report management will be through the CLOUD. In the event an emergency reset is need, contact HM IT support.*

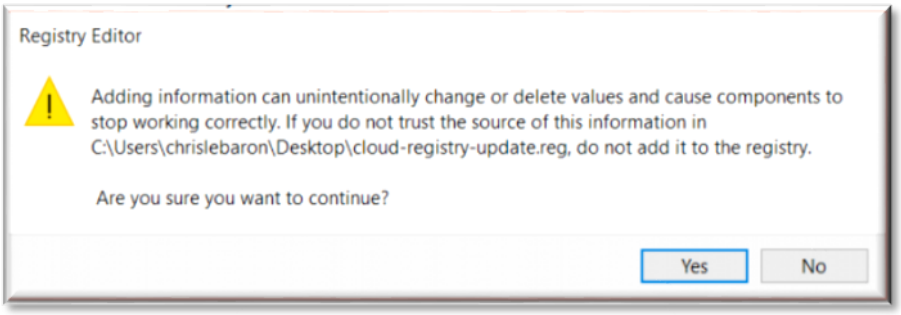
1. Changing Computer Registry

To connect to the HM CLOUD, start by downloading the file in the link below. It is recommended that *Google Chrome* be used for this download, as some other browsers may download the file in the wrong format.

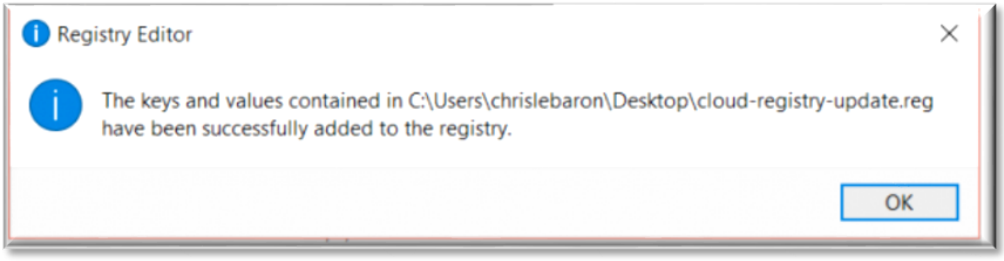
a. Make sure your PCX-HomeGauge program is closed.
b. Click here to download the file
c. Open the file.
d. A message will pop up asking if you want to make changes to your PC.



e. Click "Yes."
f. You will be asked if you trust the source file.

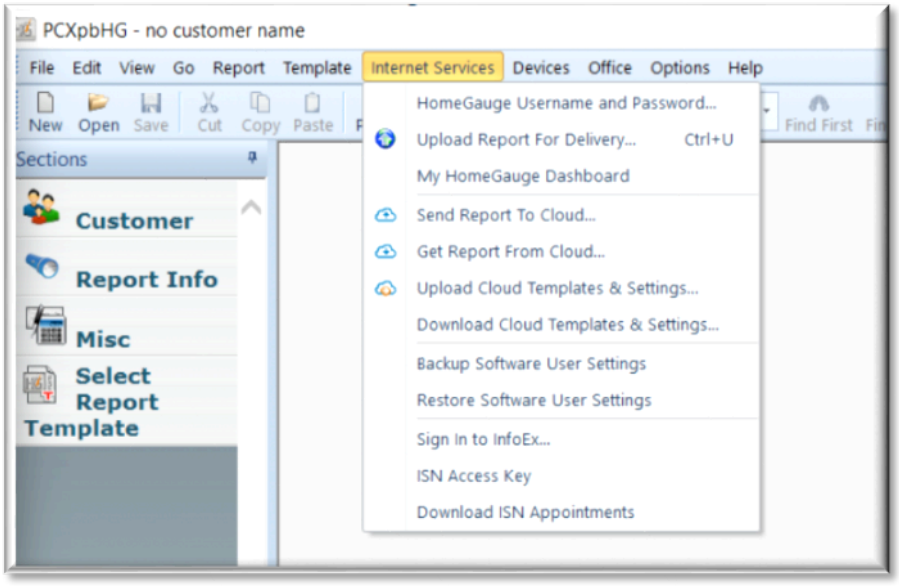


g. Click "Yes" again
h. Finally, you will see confirmation of a successful registry change.

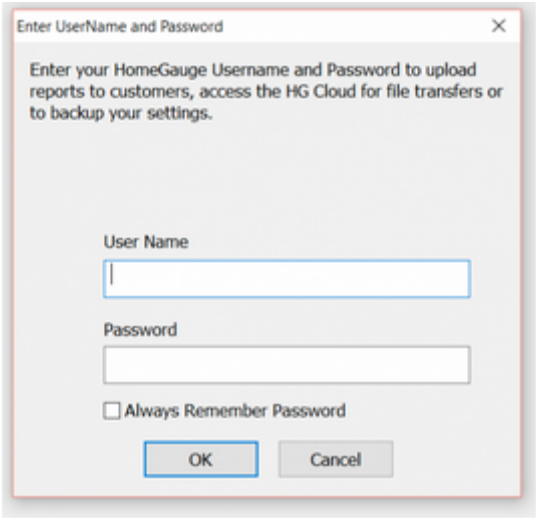


i. Click "OK."

j. Open your PCX-HG program.
k. Select “Internet Services” > “HomeGauge Username and Password.”



l. Enter your HouseMaster CLOUD username and password. (This is likely different in most cases from the username and password used for the HouseMaster InfoEx or HomeGauge.)



2. Associating office inspectors with an office CLOUD account

To add Inspectors to the CLOUD, follow these steps:

a. Login to your HouseMaster CLOUD account.
b. Click “Dashboard” > ”Company Directory”.
c. Once there, click on “New Company User” at the bottom.
d. Fill out their user information and give them “Inspector”, “Office manager” or both roles as applicable. Click Create User.

e. On the inspector's computer, make sure HomeGauge is closed and go to https://housemaster.com/article/update-to-CLOUD and download the file listed in step on of that tutorial.
f. Run the file and click "Yes" or "Ok" at all the prompts you get.
g. If they use the HomeGauge companion, setup an appointment with Matthew Bruce or Chris LeBaron to get it setup.

Note: Each account must be registered with its own email address.

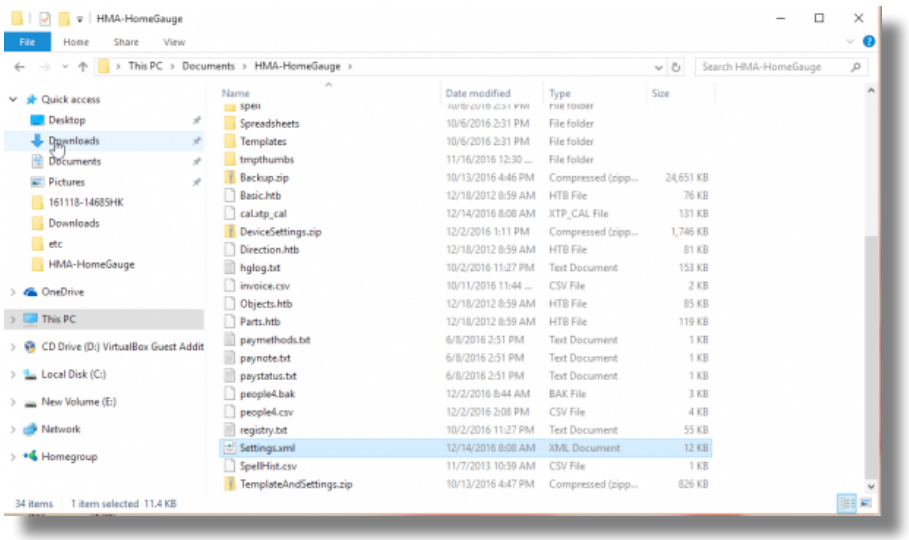
D. USING HG COMPANION WITH THE CLOUD (for HG Companion Licensees Only)

Once the registry changes are complete and the software is integrated with ISN, the HG Companion App can also be set to work with HouseMaster CLOUD. Details are provided below for the HG companion setup; however, it is also possible to do this transition by plugging the Android phone into the computer and transferring the file.

1. Integrating with the HomeGauge Companion

If you are not experienced working with a computer registry, before attempting this setup, contact IT support at support@CLOUD.support.com for assistance. To start, make sure the PCX-HG software has been opened, run and closed at least once before continuing with the instructions below.

a. First navigate to your Documents\HMA-HomeGauge folder on your computer. In this folder you will find a file called "Settings.xml".

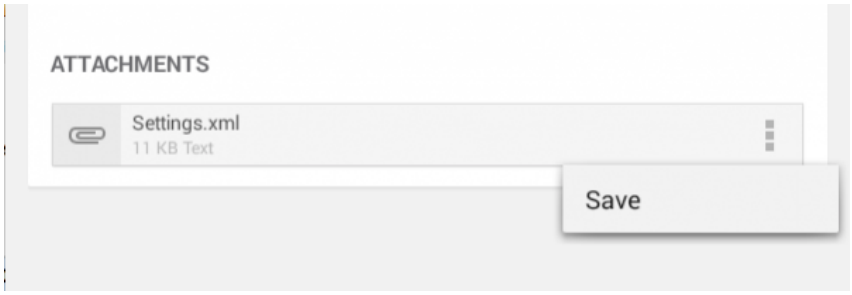


b. You will need to copy this file to your Android device. You can use whatever your preferred method is for this. In this tutorial, we're going to email it to an email account that is viewable on the Android device. If you're confident using the cable or an SD card to make the transfer, feel free to do so.

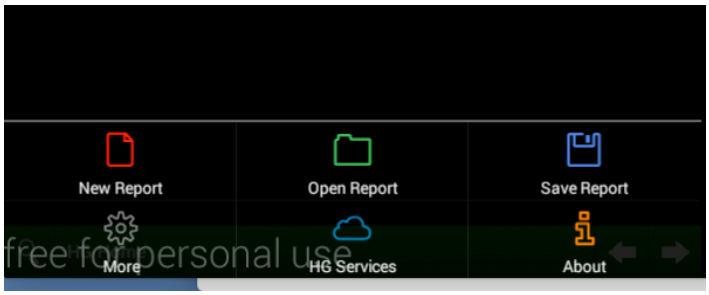
c. For those using the email method, please attach this "Settings.xml" file in an email sent to yourself. Tip if needed: http://lifehacker.com/5803366/how-to-send-an-email-with-an-attachment-for-beginners

d. Open the email on your Android device.

e. Save the attachment.



f. Once you've done that, open the HG Companion App, Access the Menu and click "More."



free for personal use

g. Then push "HomeGauge Data Folder"

h. Once you've done that, you should see a field labeled "Current Setting". Make a note of this exact file path, because that is where we're going to need to move the "Settings.xml" file to. (If you're copying the file directly from your computer with a cable, you can go ahead and replace the Settings.xml file in that is already in this folder with the one from your computer.)

i. Now you need to use an app called "ES File Explorer" to move the "Settings.xml" file from the downloads folder, to the folder path we found in the previous step. If you have the app, great! If not, go ahead and download it from the Play Store.

j. Once you have "ES File Explorer," open it up and click on the menu button in the top right corner. From here it could vary what you see depending on the device. On this example, we're going to select the second "Home" that doesn't have a home icon next to it.

k. Now navigate to the location you found in Step h.

l. Once there, find the "Settings.xml" file that is already in the folder. You need to replace it with the one you copied. Push and hold on the file until the menu pops up, and click "Delete".

m. Repeat step j, and then click on the "Downloads" folder

n. Click and hold on the "Settings.xml" file. Then click on "More", and then "Move To." Find the folder path found in Step h.

o. Now just make sure and restart the HG Companion app, and it should now be using the HouseMaster CLOUD servers instead of the HomeGauge Servers.

E. ISN INTEGRATION SETTINGS (for Offices with an ISN Account)

This integration will allow you to download customer, agent, and inspection data to you HomeGauge software and allow you to transfer PDF copies of reports to ISN after upload to HM CLOUD. It will also allow you to create settings to automatically lock out customers who have not paid for their report or signed their agreement on ISN.

1. Integrating with ISN – Required to Download Report Data and Upload to ISN

To integrate with ISN, account keys must be entered in a few fields in the HomeGauge software and at HouseMaster CLOUD.

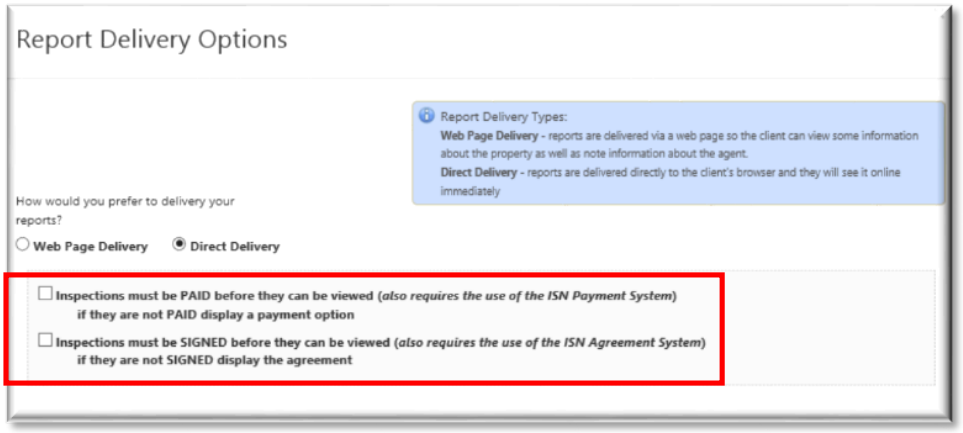
- In the PCS-HomeGauge desktop report software click "Internet Services" > "ISN Access Key"
- Enter ISN Company Key, ISN Access Key, and Secret Access Key. These keys can be found after logging in to an ISN account under "Settings"->"My Access Keys"
- Login to CLOUD.housemaster.com
- Click "Profile"
- Scroll to bottom and click "Create ISN Credentials"
- Enter your ISN Account keys.

Note: The ISN credentials (Company Key, Access Key and Special Access Key) must be added to the profile for each Inspector in an office.

Once this keys are entered and saved, selecting the "Send to ISN" button on the report view page will now send the report and its attachments to ISN.

2. Report Delivery Settings in ISN (ISN defaults will no longer apply).

Certain settings in ISN cannot be communicated to the HouseMaster CLOUD. For example, if an Inspector's default settings for report delivery indicates that a report can be view even if not paid (ISN setting option below is unchecked), that setting will have no bearing on the report access at the HM CLOUD.



To make sure unpaid inspections are not viewable by Customers in the HouseMaster CLOUD, a default setting option in each Inspector's profile (or Company Office Settings, Part II, G) must be set to either block access to unpaid reports, or allow access. In either case, if you have an exception to the default, the report will have to be manually locked or unlocked in the Dashboard's "My Reports" section of the CLOUD.

Note: If an inspector plans to download inspection details from ISN, when entering information (besides Agents) in PCX-HG, it is essential that the address details match exactly. (i.e.., Road is not the same as Rd.; Drive is not the same as Dr., etc.). If the address does not match, CLOUD will not be able to bring in the Agent information from ISN and report upload issues may occur.

F. CREATING CUSTOMER AND AGENT ACCOUNTS

Once you have set up an account for yourself and Inspectors, you can create accounts for customers and agents. These accounts can be setup before an inspection or when a report is ready for upload. An account can be created for a customer by completing the information in the PCX-HG software, but a CLOUD home account is not created until the report is uploaded. If you want to create a home account for them so an Inspector can upload appliance information for recalls before the report is uploaded, it needs to be done from the "Todays Appointments" screen.

1. Creating Customer and Agent User Accounts

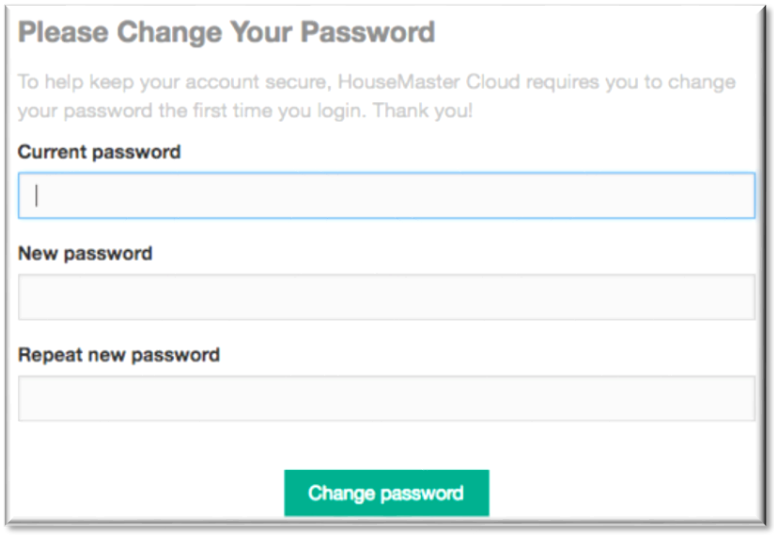
a. Creating Usernames (using ISN). The username for all users is their email address. If an account is created through the ISN integration, the email address will be pulled from ISN.

b. **Creating Usernames through HomeGauge.** If the PCX-HomeGauge software is used to create usernames rather than ISN, the email you enter in HomeGauge becomes the username. When adding agents, it is important to identify their role (Buyer or Seller Agent), otherwise notifications may be sent out to the wrong agent. If neither agent category is selected, CLOUD will record the person as "Unknown."

Note: If using ISN and the agent information is entered in ISN, the agent must not be added to the report in the PCX-HomeGauge software. If an agent is added in both ISN and the software, there will be a conflict in the data pulled and the agent will not be associated with the report once uploaded to CLOUD and will not get notifications of uploads.

c. **Temporary Password Creation.** A temporary password is automatically and randomly created for each HouseMaster CLOUD user account from a prepopulated word list. The password will contain four words in a string such as *HouseDogTreeOrange*. The passwords are longer than they have been in the past to ensure that customers have a secure account.

d. **Changing Passwords.** Users are now required to reset their password on their first visit to HouseMaster Cloud. This way they will further secure their account by not having their password available for anyone who hacks their email, and they will be able to set it to something they can remember.



Once an agent account is created they will get email notification, depending on default settings selected under the "Company Office Settings" feature on the Dashboard. Otherwise, the notification will go out when a report is uploaded for an associated Customer. They will also be given access to the Buyer Benefit Program.

If an agent edits the contact information in their profile, CLOUD will send an email notification to the inspector so the agent's information can be updated in HomeGauge/ISN.

HouseMaster | CLOUD.

Hi,

This is an automated message to let you know that TestAgent baggins updated his/her contact information on HouseMaster Cloud recently. You may want to take a look at your records and make sure that you have the most up-to-date information.

First Name: TestAgent
Last Name: baggins
Email Address 1: bilbo@testingagent123.com
Email Address 2:

It is extremely important that the email address be spelled correctly. The number one reason for a Customers or Agents not receiving report upload notices is a misspelled email. There is an also a confidentiality issues if emails are misdirected.

2. Creating a Personal Account for an Agent

Agents can be added to a report for report viewing, a CLOUD account can also be added for a real estate agent for their personal use. The best way to handle adding real estate agents is to add them to CLOUD as you produce inspections for them. To add an agent without a report being uploaded, find their contact in HomeGauge, double click on it, navigate to the "HG User Name" tab and click "Create User Name." It will alert you that the username is already created, which n means it was created in the HomeGauge Dashboard, but a new one must be created for the HM CLOUD as described above. Agents will then get emails with their username & password, and will be able to create a home in HM CLOUD.

Note: The CLOUD is a product that can be purchased as a standalone. This helps show that it has value and provides an office justification for increasing their fees if they desire to do so.

3. Adding Agent Photo to Account Profile

An agent's photo can be added to their account.

a. Login to CLOUD
b. Click “Profile”
c. Click “Edit” at the bottom
d. Fill out any email/phone/address/company name info
e. Near the bottom under “Profile Photo” click to choose an image to upload. Make sure it’s a square photo before you upload it, or it may appear skewed in marketing materials.
f. After filling out all information click “Save changes” at the bottom.

4. Company Settings

From the CLOUD’s Dashboard, a franchisee or office manager can manage certain office settings and report delivery notifications and viewing permissions. An option also exists to use this feature to set defaults that will affect actions associated with report delivery for all inspections in an office. See Part III, Section G.

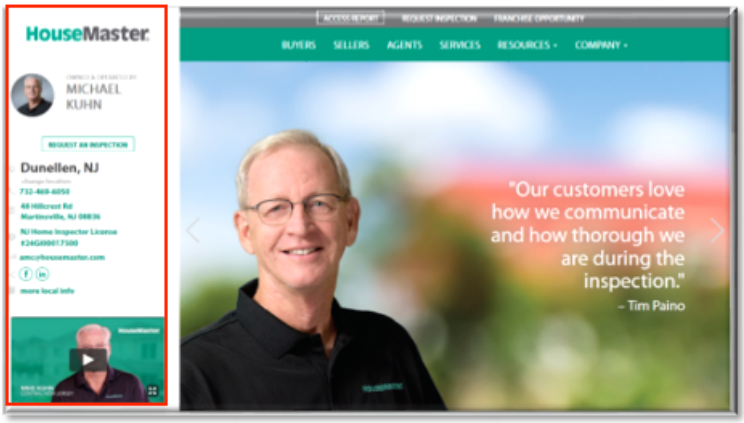
G. PROVIDING REPORT ACCESS FOR CUSTOMERS AND AGENTS

Once an office is on the HouseMaster CLOUD, customers and agents will no longer go to reports.housemaster.com to retrieve their reports, as they are now hosted on a separate d server – the HM CLOUD at cloud.housemaster.com.

a. Setting up your Webpage for REPORT ACCCESS

To provide access to the CLOUD, franchisees will need to change their settings at housemaster. com so that the “ACCESS REPORT” button on the local office’s webpage will take them to CLOUD. Alternately they can be directed to go to cloud.housemaster.com. All email notifications to customers and agents related to their reports will direct them to CLOUD.housemaster.com.

Note. *In order for the reports to be accessible through a local office’s webpage, housemaster.com settings need to be set up with the widget; that is, the left pane in the sample webpage screen below needs to be loaded through each office’s settings at housemaster.com.*



b. Changing the “REPORT ACCESS” link on your webpage

To change the “Access Report” link to the CLOUD login to your housemaster.com account, go to your HouseMaster Dashboard.

a. Under “Account Info” click “Edit Account Info.”
b. The “Edit Account” form with appear.
c. Check the “Access Report” link at HouseMaster CLOUD checkbox
d. Click “Update.”

Now if your customers/Agents are on housemaster.com with your widget loaded, the “ACCESS REPORT” button will take them to CLOUD.housemaster.com.

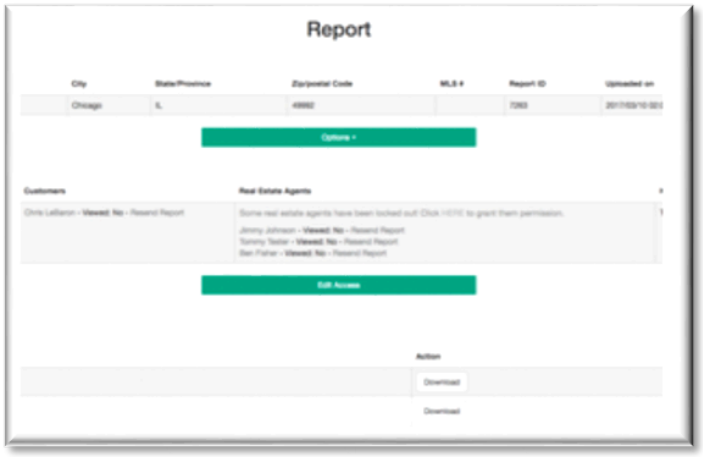
c. Giving Permission for Report Access

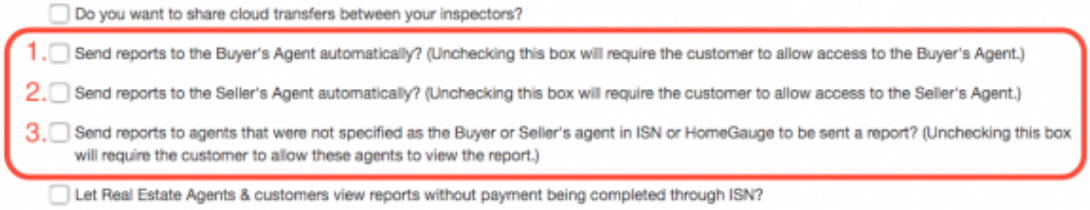
1. **Permission for Customers.** Customers automatically have access to their reports (unless defaults preventing report access are turned off for unsigned order agreements or unpaid inspection fees.)

2. **Permissions for Agents.**

   a. **Setting roles for agents.** Depending on whether an Inspector is using ISN or HomeGauge to set Agent roles, different outcomes can occur. HomeGauge strips the role from the agents when it imports an appointment from ISN, so to set an agent’s role in HouseMaster CLOUD, click on the “Set Role” button by the “Real Estate Pros” list in HomeGauge and set them as the "Buyer Agent.”

   b. **Default settings for agent access.** You can choose several default options for allowing agents to have access to reports. To do so, log into your CLOUD account, select PROFILE, and add preferences at the “Split Agent Toggle” feature.





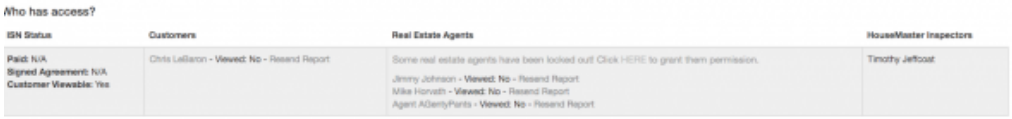
c. Report Delivery Key

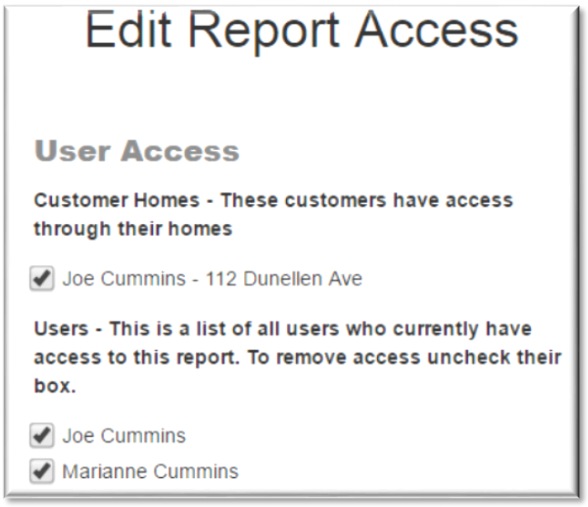
1. **Send reports to the Buyer's Agent automatically?** When set to "No/unchecked", this option will make it so that when a report is uploaded the Buyer's Agent will not be notified or given access to the report. When the customer logs in and views the report, they will be given the option to share the report with the Buyer's Agent. If this setting is checked (set to "Yes"), if no Buyer Agent is entered in PCX-HG, the Buyer's Agent will be pulled from ISN.

2. **Send reports to the Seller's Agent automatically?** When set to "No/unchecked", this option will make it so that when a report is created the Seller's Agent will not be notified or given access to the report. When the customer logs in and views the report, they will be given the option to share the report with the Seller's Agent. If this setting is checked (set to "Yes") and no Seller Agent is entered in PCX-HG, the Seller Agent will be pulled from ISN.

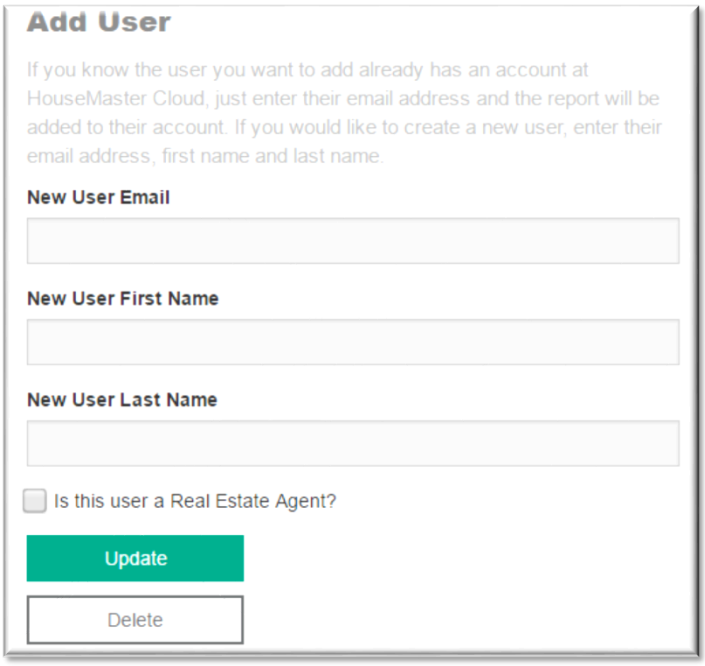
3. **Send reports to Agents that were not specified as the Buyer or Seller's Agent in ISN or HomeGauge to be sent a report?** Often reports are uploaded with agents attached, but they are not specifically set as the Buyer's or Seller's Agent. In cases like this, if this setting option is "No/Unchecked," agents without a role would not be able to view the report until the customer grants them access (or a franchisee or inspector does so by impersonating the customer).

If there are agents who do not have access to the report, but are listed on the report, a notice will display in the "Real Estate Agents" or the "Who has Access?" portion of the dashboard when viewing the respective report. Franchisees and inspectors can modify their access through the Dashboard.





A new used can be added to a report through the same feature.



WARNING: *Do not add agent information in the PCX-HG software "report Info" screen if the report data will be pulled from ISN. Once downloaded from ISN, the agent information will populate in the HM CLOUD automatically; but if the agent's information is also added in the PCX-HG software, CLOUD will not pull in the agent information from ISN – and they will not be able to get to the report.*

H. UPLOADING REPORTS

To upload inspection reports and other documents to CLOUD the settings in Section B must be completed first.

1. Uploading Home Inspection Reports

To upload reports to CLOUD, once the initial registry changes are made, when "Upload" is selected in the HomeGauge software, the report will automatically upload to HouseMaster CLOUD – reports will no longer go to the HomeGauge servers. PDF copies of reports can also be sent to ISN once the settings described in Section D are completed.

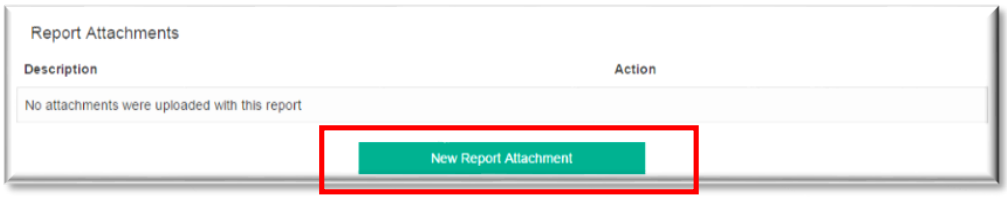
2. Additional Attachments/Reports

Any attachment that is added to a report will show in this section, whether added with the initial report upload or separately.

a. **Add Attachments.** To add additional reports, test results or other documents (e.g., radon test, mold screens, etc.), first save the report file on your computer (ideally in the applicable report folder) and then do a search or navigate to the desired report on the HouseMaster CLOUD and click "Show." There is no limit to the number of attachments that can be uploaded.

Note: The red exclamation symbol (!) indicates that the report has not been opened. If the (!) is available to Customers when they log in view, it means they haven't view the report. If a franchisee user views the report as an Impersonator, it will still show as unviewed for the Customer.

Next, scroll down to Report Attachments and click on "New Report Attachment."



When the window below opens, select "Choose File" and navigate to the appropriate file, highlight it, and select "Open." Next add a name for the file in the "File Name/Description" and select "Create."

This will add the new document under the Report Attachments with a "Download" button to allow the Customer or other party with permission to download it to view or print.

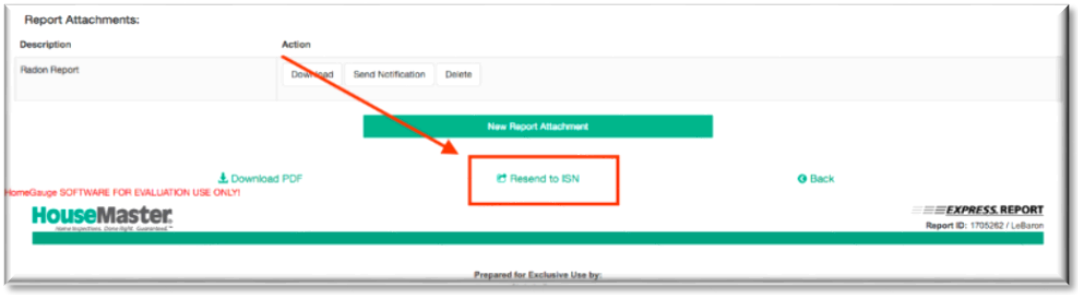
b. Delete Report Attachments. A "Delete" button is included for report attachments that are uploaded through the CLOUD, in case the wrong document was uploaded or to add updated versions. This delete option will not work for attachments uploaded along with the report through PCX-HG.

3. House Picture/Screen Shot

CLOUD will pull the home overview image (the first one image if multiple ones have been included) from GOGLE to show on the MY Home screen If there is a house image included in the General Info section of the reporting software, that image will show with the report view. If a Customer signs up for CLOUD without having an inspection done, there will be no report picture to include.

4. Sending Reports to ISN through CLOUD

Users with an ISN account can send uploaded reports to ISN by selecting the button at the top of the screen when a report is viewed. If a report has already been transferred to ISN (from today forward. reports that were previously sent to ISN will not see this change.), the button will read "Resend to ISN" instead of "Send To ISN".

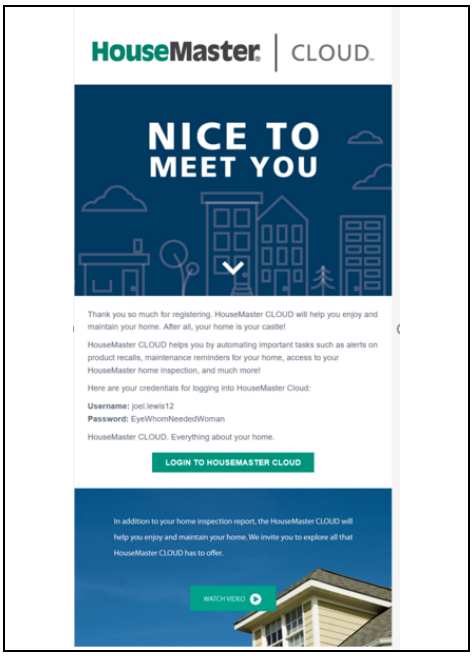


I. EMAIL (OUTGOING) NOTIFICATIONS

Email notifications will be sent out with certain actions related to a particular CLOUD account. These professional emails have been created by the HouseMaster and includes the information needed for the customer and agent to access their accounts and report. These notifications cannot be edited; see example of each email below.

1. Account Creation

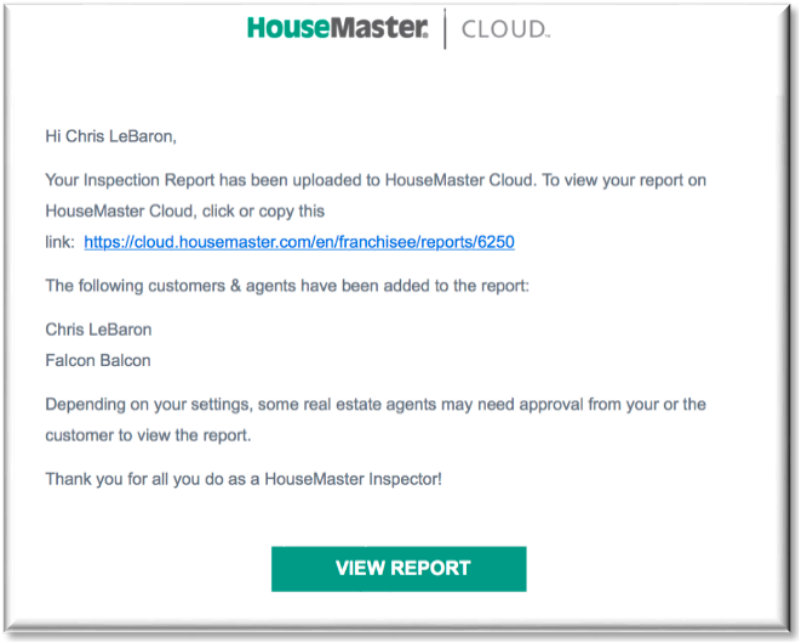
As soon as an account is created (depending on PROFILE settings) customers and agents will receive an email notification welcoming them to the CLOUD. If the setting is turned off, the first email will only go out after a report has been uploaded. The first email will contain their username (their email address). and password. The emails will also contain a link to the HouseMaster CLOUD explainer video.



Once customers log into their account, they will have full access to all the features available on the local Housemaster office webpage. Webpage information is pulled from the HouseMaster.com widget, which can be updated by an office through housemaster.com.

2. Notification of Report Upload

Customers and associated agents will receive another email notification as soon as the report is uploaded or when an additional report or other attachment is uploaded. The initial upload will trigger Satmetrix (CARES) Survey, the Buyer Benefits, and Concierge links. Inspector notification can be set to get notified if a customer or agent hasn't accessed the report after a set time (options 4-8-12-24 hours) in PROFILE.



3. Notification of Attachment Uploads

Customer and associated agents will receive email notification when additional documents such as lab results, radon reports or WDI reports are uploaded at a later date.

4. Notification for Satmetrix Surveys

Satmetrix has been integrated with the HM CLOUD. CLOUD will pull information about inspections daily to send out surveys. Retroactively contacted customers who had an inspection done in the past 45 days.

J. EVENT STATUS TRACKING

All critical events associated with a report are tracked. The status log will also show how much (percent) of the report has been viewed. Once logged in to CLOUD, go to dashboard and choose a report. Open the report to look to see who has viewed the report and who granted access has not.

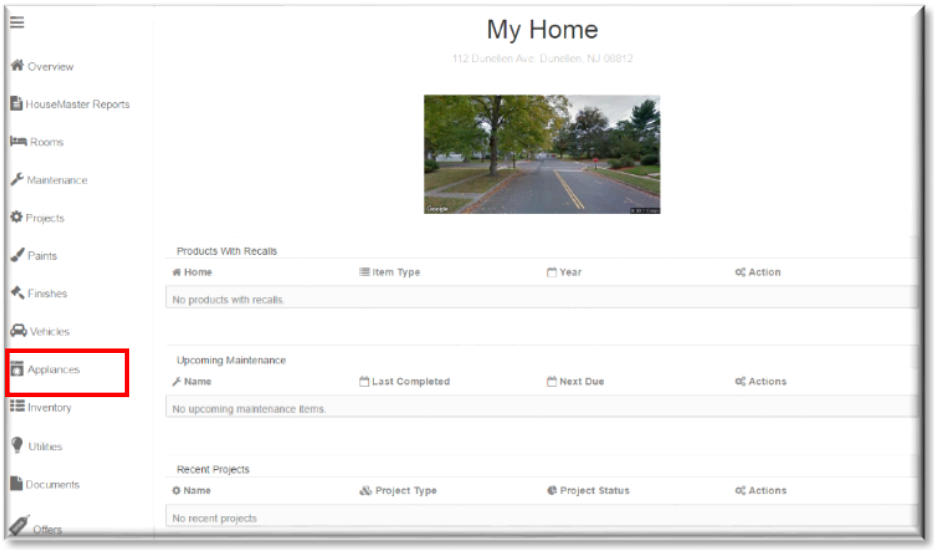
When impersonating a Customer or Agent, you can view all events related to a particular report. This includes when reports were uploaded, notifications sent, when the report was open etc. A detailed explanation of the email notifications can be found in Part III, the DASHBOARD "Email Status" options. See Part III for Dashboard.

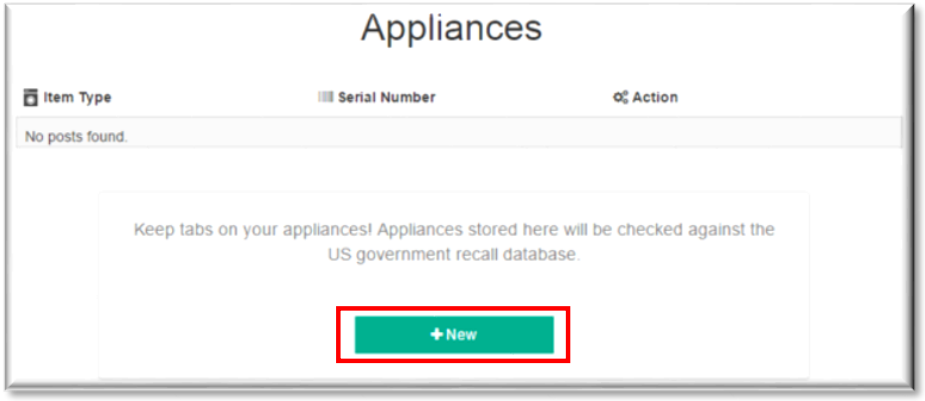
K. APPLIANCE DATA RECORDING

Appliance data can be recorded by the inspector or a customer once an account is set up and a home (the one being inspected) is added. By adding a home to the account, an Inspector can add information for a customer, namely appliance data, while on the inspection or preparing the report. Appliance information can be recorded in the system by manually entering data or uploading a legible photo of the nameplate. Uploading appliance data during the inspection may also enable an Inspector to get confirmation of appliance ages while on site, subject to the time/day of upload if the inspector's profile settings is set to receive SMS messages.

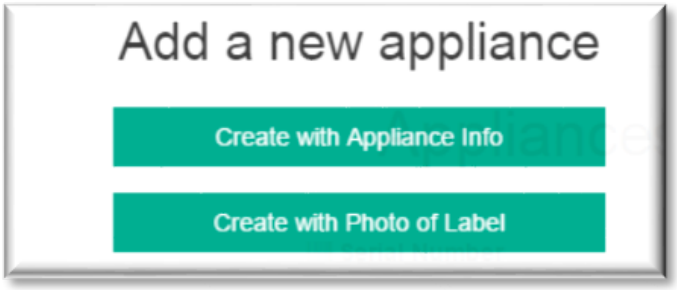
1. Adding Appliance Data

Select Appliances from left side menu available from the MY HOME screen and selecting the "+New" button.



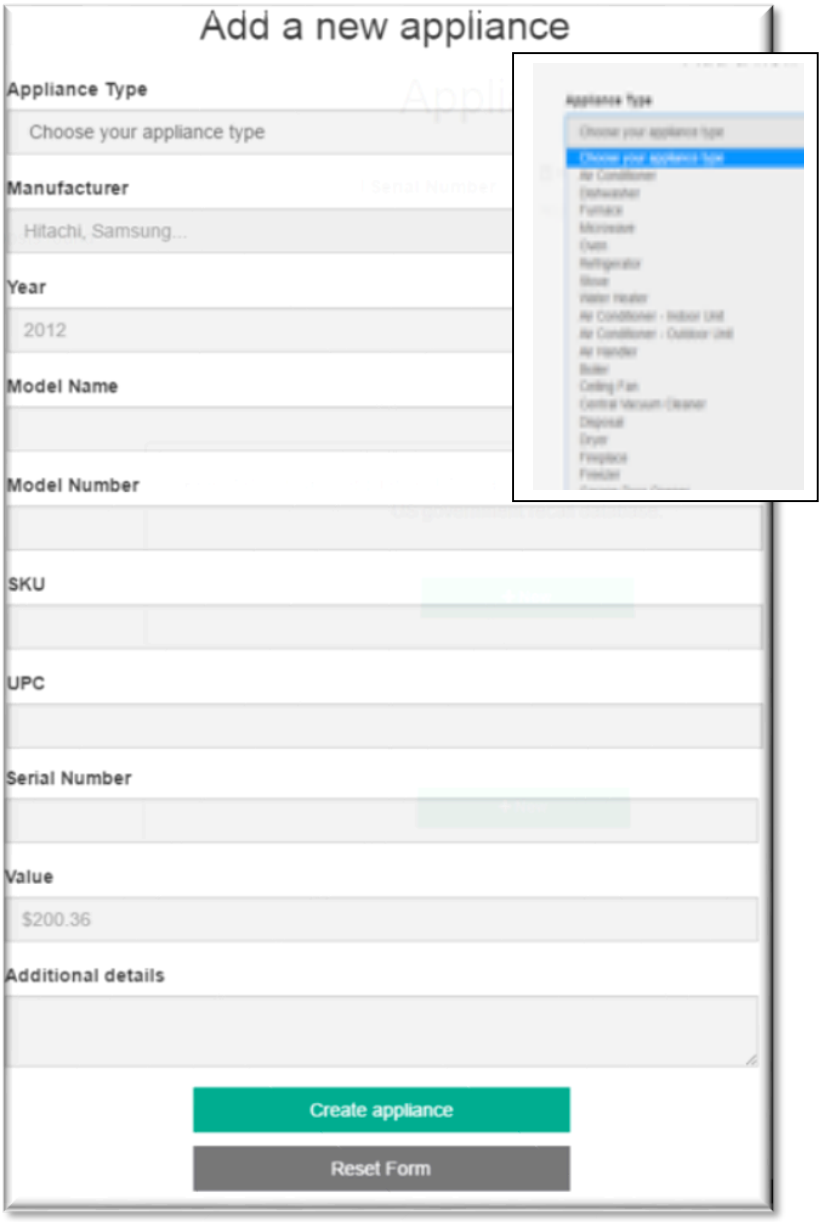


When "New" is selected, the following screen opens, with the option to add ("Create") a new appliance by manually entering data or using a photo of the label.



a. Adding Appliance Data by Manually entering Data

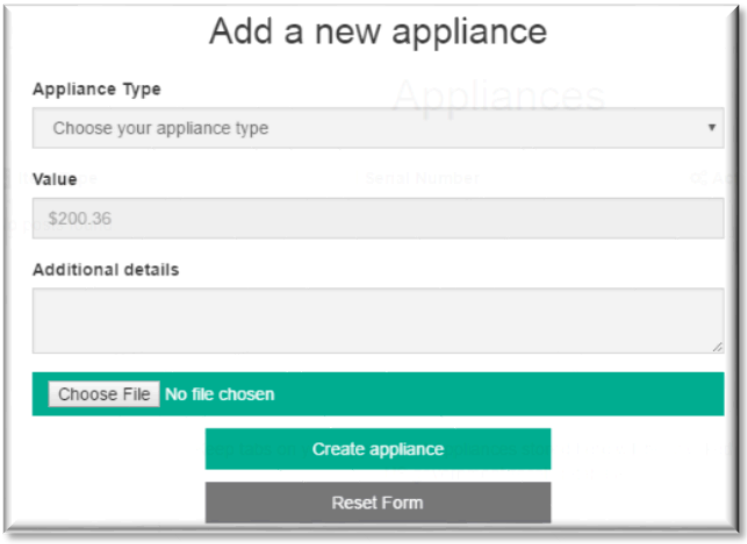
Select "Create with Appliance Info" and the following screen opens, allowing manual entry of collected appliance label data. A dropdown menu lists home appliances, with the more common ones at the top of the list. Choose an appliance type from the dropdown menu and add the value and additional details if desired. Once the data is entered (minimum data required is the brand and model number), select "Create Appliance" to add it to CLOUD. Select "Reset Form" to add data for additional appliances. The year of manufacturer is not required when adding data manually.



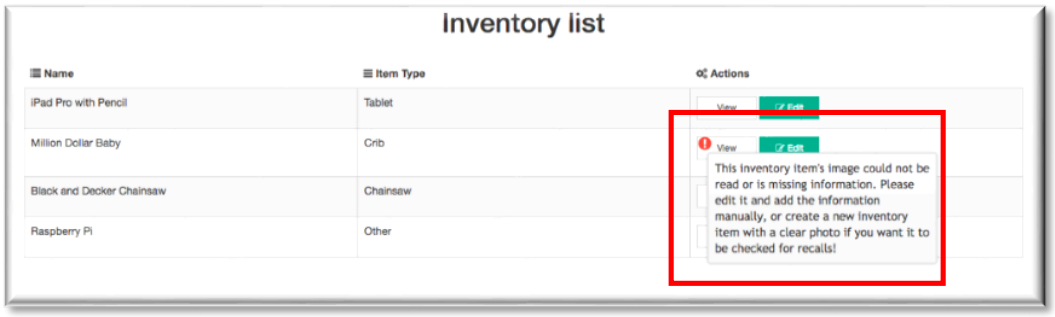
b. Adding Appliance Data using a Photo of Label

Select “Create with Photo of Label” and the following screen opens, enabling the upload of appliance data to CLOUD using a photo. Once the appliance label is saved to a cellphone, tablet or computer file, it can be selected for upload to CLOUD. The label data saved as a jpg file must be clear and complete for data to be retrieve for recall or manufacturing date determination. Notification will be sent to the User if the image is not usable.

Choose an appliance type from the dropdown menu and add values and additional details if desired. Select “Choose File” to find the applicable photo file. Browse the computer directory to find the desired photo file. Select “Okay,” and the file name will appear to the right of the “Choose File” button. Select “Reset Form” to add data for additional appliances.



If an appliance label image or inventory item uploaded to CLOUD isn't readable or was missing pertinent information, a notification icon will appear of the applicable screen and a message will be sent to the Inspector or Customer attempting to upload it.



2. Appliance Age Notification

HouseMaster Inspectors can record appliance information with a cellphone/digital camera during the inspection and if a customer account is created and a home added, the photo file can be uploaded to the HouseMaster CLOUD. Once a photo is uploaded, back office agents will review the data and research recall databases for equipment ages and possible recall information. Inspectors who chose to get SMS messages when setting their profile will receive a text of identified appliance ages.

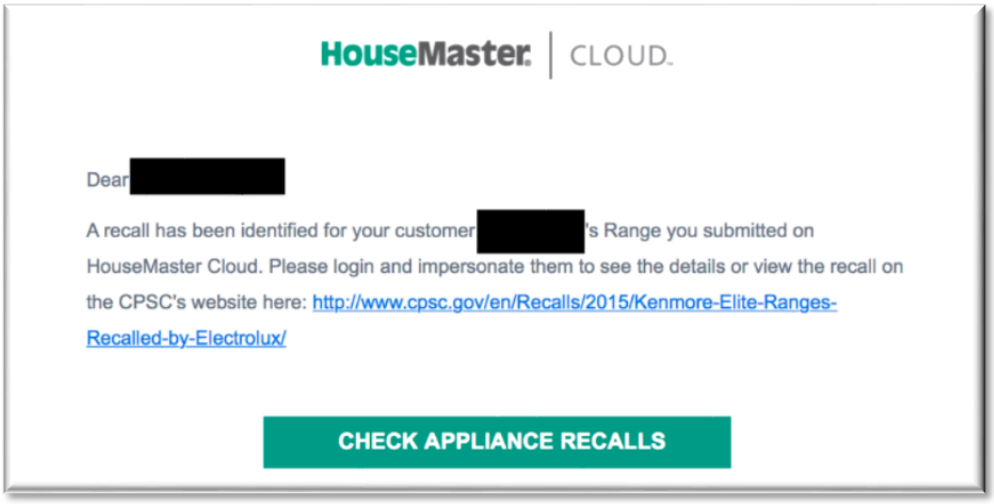
While no guarantees on turnaround time can be provided at this time, the goal is to provide information on manufacturer dates to Inspectors within 30 minutes after the information is received – during normal business hours (currently Monday-Friday, 8am -9 pm EST). Results on data received after hours, holidays and weekends will normally be provided the next business day. Efforts are continually being made to improve the turnaround on this feature, with expansion of back end agent availability as demand dictates.

2. Recall Notifications

HouseMaster CLOUD will provide customers with valuable information on safety recalls for appliances, other household products and vehicles after the appropriate data (i.e., Brand, Model/Serial numbers) is provided by the Inspector and/or customer through the applicable CLOUD feature. Customers can add information on additional appliances as well as other household products and vehicles at any time, if they have a CLOUD account.

Customers will get email alerts when a recall associated with a recorded item is identified, as well as monthly newsletters summarizing recalls and providing other information. Customers can also request text messages for recall information in their profile settings.

Inspector will be emailed about appliance recalls found within 48 hours after a home is created on HM CLOUD.

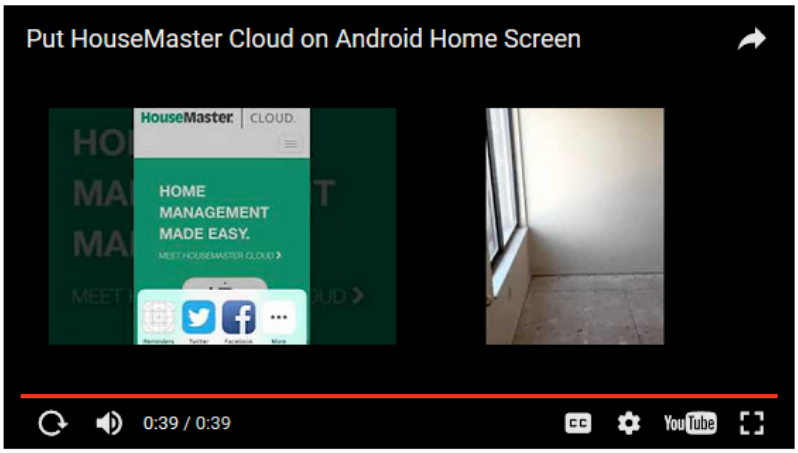


L. ADDING HM CLOUD TO MOBILE DEVICES

CLOUD can be added to Android and IOS Mobile Devices Home Screens

1. Adding CLOUD to Android Devices

Add HouseMaster CLOUD on an Android Device Homescreen

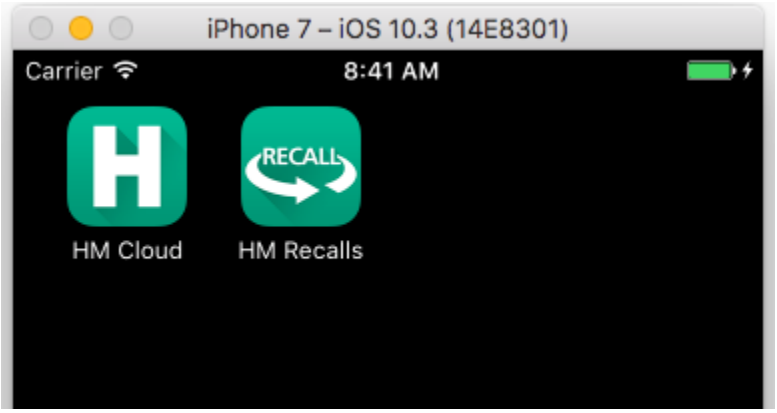


2. Adding CLOUD to IOS Devices

Add HouseMaster CLOUD on an iPhone or iPad Android Device Homescreen

3. Icons for Mobile

There are 2 different icons, one default for HouseMaster CLOUD, and one for the Today's Appointments page. You can add both to your homescreen on your mobile device for quick viewing. For instructions on adding a website to a homescreen on any device, click here.



M. SUPPORT CONTACTS

The HouseMaster Tech and IT Staff are available as the primary contacts for help getting set up with the HouseMaster CLOUD or any issues related to HouseMaster specific templates, programs, and basic reporting help.

Please call or email the appropriate contact to report issues or ask for help. Please, do not rely on Facebook or other social media posts, especially with any critical or time-sensitive issues, when help is required.

IT Support
Matt Bruce HM IT Support matthew.bruce@housemaster.com 732-564-7192
Chris LaBaron contact Point Solution IT Support

HouseMaster Tech 800-526-3939 732-469-6565
Joe Cummins joe.cummins@housemaster.com 732-733-2021
Joe Tangradi joe.tangradi@housemaster.com 732-823-4214
General Number 732-469-6565

HomeGauge Support
HomeGuage has no involvement with the HouseMaster CLOUD, and should not be contacted for any issues related to CLOUD. However, if ther are issues with PCX-HG software or the HomeGauge Dashboard that can't be resolved with HM IT Supprt, HomeGauge can be contacted for assistance at support@homegauge.com 877-274-4299 (Mon.-Fri. 9am-5pm EST).

PART III
THE CLOUD DASHBOARD

A. MENU ITEMS

The Dashboard Dropdown Menu allows a franchisee to review and perform actions related to Reports, Customers and Agents associated with inspections they have uploaded; the Company Directory of office and Inspector staff, Reports associated with their company uploaded by other Inspectors; and, current Appointments.

B. MY REPORTS

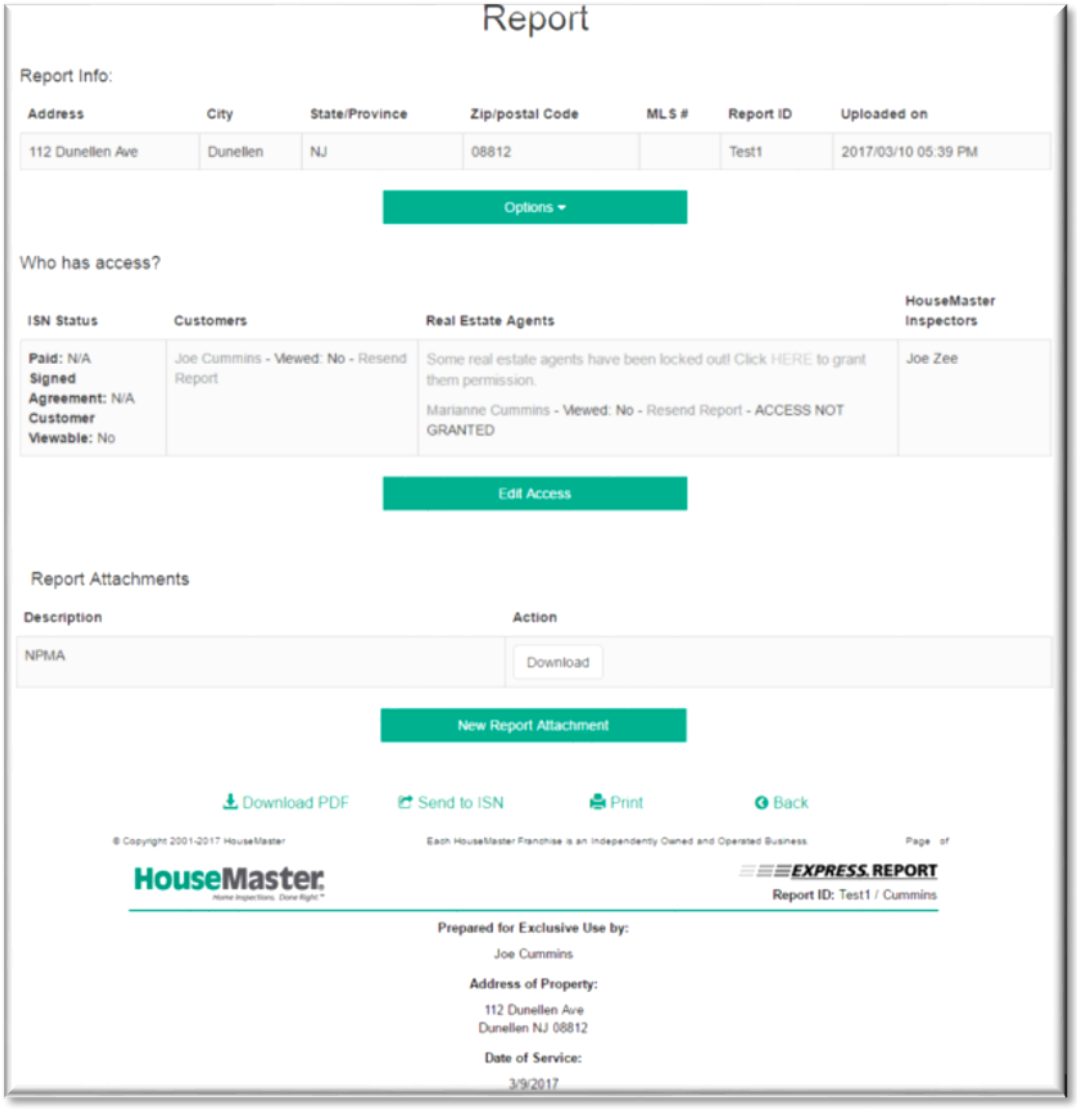
Select this menu options and a list of inspection reports uploaded by the franchisee (or inspector who has logged in) will appear, with options to Search for Reports, Show or View the Report, Edit Access Information and Publish or Unpublish the Report. For franchisee or office managers to see all reports for the company, select COMPANY REPORTS from the Dashboard Menu.

1. Search for Reports

This "Search" feature allows you to search for reports by entering customer first name, customer last name, customer email, agent first name, agent last name, agent email, property address, report # and MLS#.

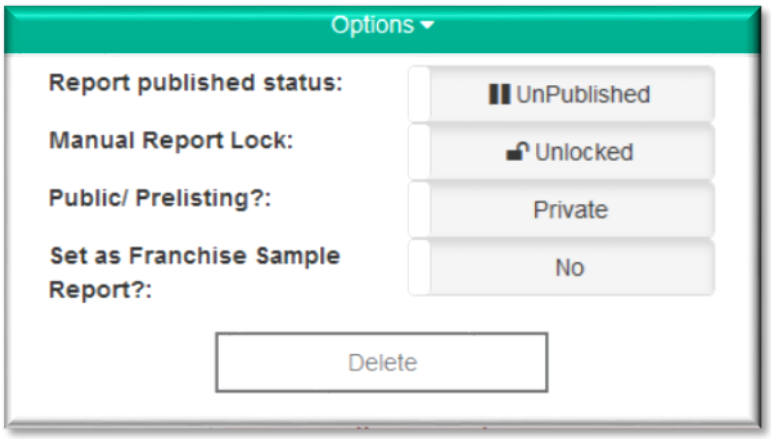
2. Show or View Reports

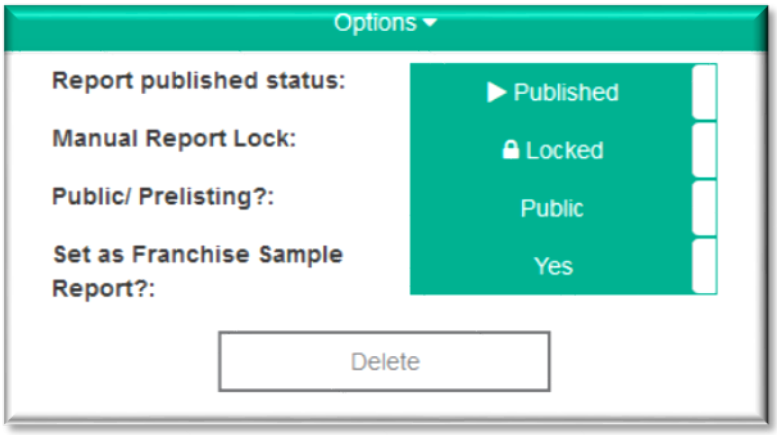
Click “Show” or “View” to open this screen, which gives the options to set Report Access, Edit Who Has Access, Add Attachments, and Review the Report.



a. Selecting “Options” on the screen above

Select “Options” on the screen above and eight (8) setting options related to report access (but not specifically who has access) will show. Default settings are set with individual account setup; however, some may be controlled by Company Office Settings (see Part III, Section G). An explanation of the settings is provided below the images.





Note: *For ISN integrations and proper function of related features in CLOUD, each Inspector's ISN credentials must be entered in their profile (not the franchisees or the office manager's credentials). Also, if the ISN download feature is not used, certain features of CLOUD, such as automatically locking a Customer out of report access if the order agreement is unsigned or report fee is not paid, will not work.*

b. **Key to Option Settings**

i. Publishing the Report:

1. If you select **"Publish"** the confirmation reads:
   - *"The report has been published to all associated Customers & Agent"*
2. If you select "**Unpublish Report"** the confirmation reads:
   - *"The report has been hidden from all associated Customers & Agents."*

ii. Manual Lock or Unlock:

1. If you select **"Unlock Manual Lock"** confirmation reads:
   - *"This will provide full access to anyone with a username and password associated with the account.*
2. If you select **"Manually Lock"** confirmation reads:
   - *"This will lock out all access to report."*

Default setting options to automatically for Lock or Unlock include:

a. Paid or Unpaid:

1. If you select **"Unlock if Paid on ISN"** confirmation reads:
   - *"The report can now be viewed by Agents & Customers regardless of whether they have paid or not."*
2. If you select **"Lock if Unpaid on ISN"** confirmation reads:
   - *"This report cannot be viewed by Agents & Customers unless they have paid."*

b. Signed or Unsigned:

1. If you select **"Unlock if Unsigned on ISN"** confirmation reads:
   - *"This report can now be viewed by Agents & Customers regardless of whether they have signed their agreement or not.*
2. If you select **"Lock if Unsigned on ISN"** confirmation reads:
   - *"This report now cannot be viewed by Agents & Customers unless they have signed their agreement on ISN."*

iii. Make Report Private or Public (for Pre-listing):

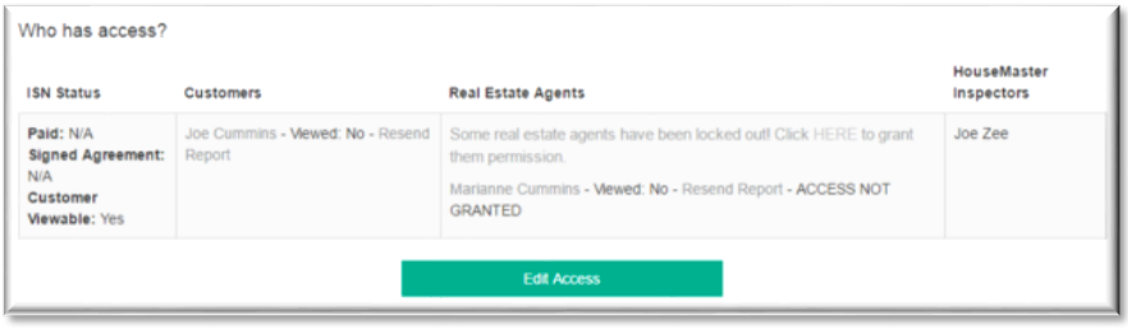
1. If you select **"Make Report Public (pre-listing)"** the confirmation reads:
   - *"This report is publicly viewable at* https://CLOUD.housemaster.com/en/housemaster-reports/public/1375franchise/009999/sample-report*. Agents (and sellers) can share this link with potential buyers and they will not need to login to view the report."*
2. If you select **"Make Report Private (remove pre-listing)"**:
   - *There is no confirmation message; report access will depend on default or manual set changes made for Customers and Agents.*

iv. Post a Sample Report:

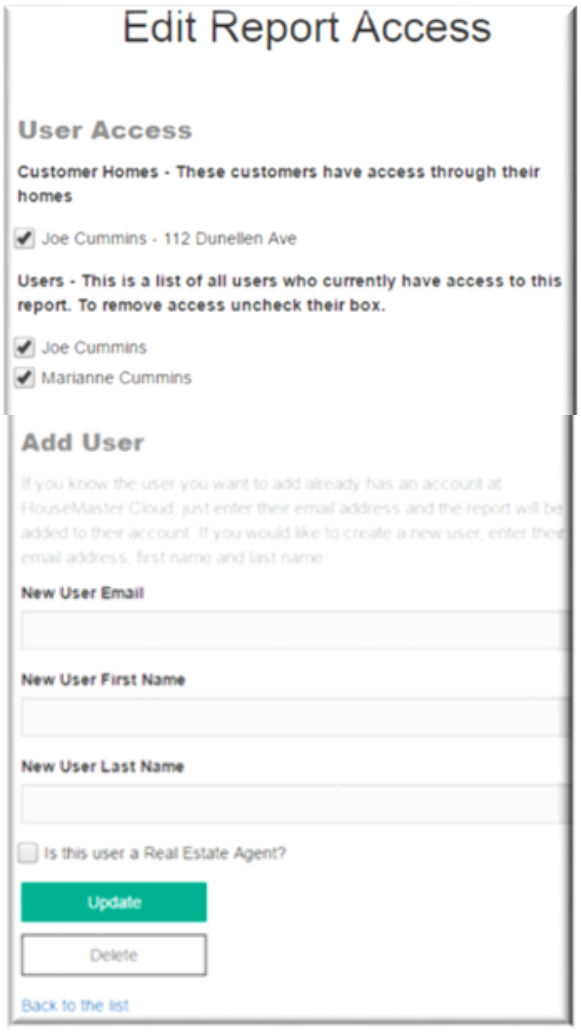
1. If you select **"Set as Franchise Sample (public)"** the confirmation reads:
   - *"This report is publicly viewable at* https://CLOUD.housemaster.com/en/franchise/009999/sample-report*. You can share this link with potential Agents and Customers and they will not need to login to view the report." This link will continue to be functional even if the actual sample has changed.*
2. If you select **"Remove Sample Report Status (make private")**:
   - *There is no confirmation message; report access will depend on default or manual set changes made for Customers and Agents.*

3. Edit Access

This screen data shows status of ISN documents (payment, agreement signed) and what customer and agents have access and other actions related to the report. Edits can be made for access from this screen.

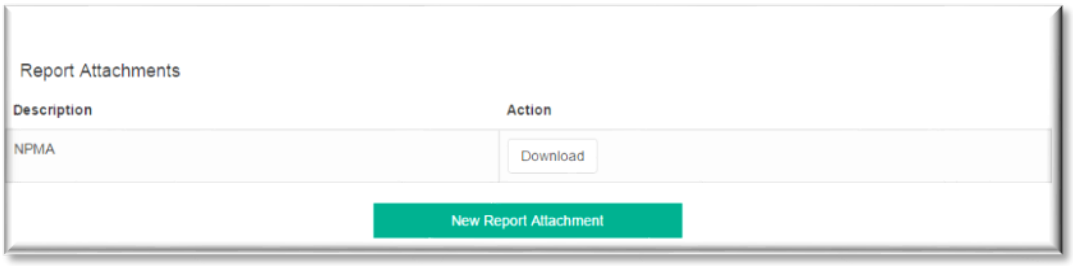


Select “Edit Access” and the option to provide or deny access to customers and/or agents is available. Additional users can also be added and access granted.

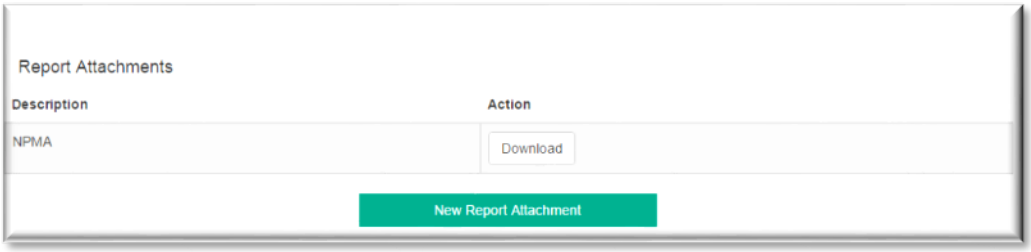


4. Add Report Attachments

Select “New Report Attachment” and search your computer files for documents to attach.

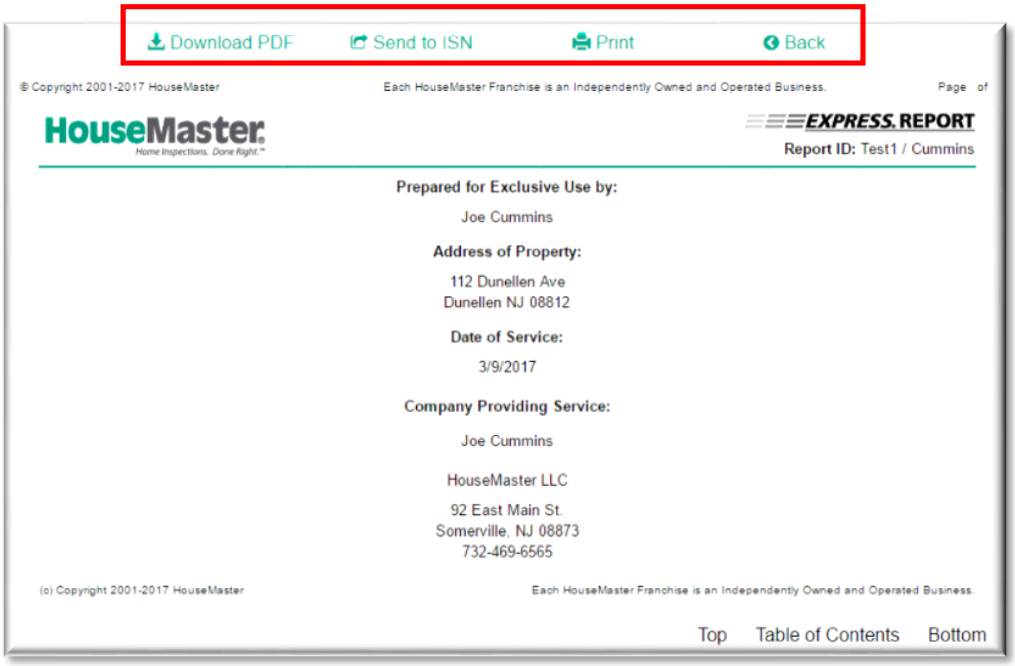


If a report has been attached, it can be viewed, printed and/or saved elsewhere by selecting: "Download"

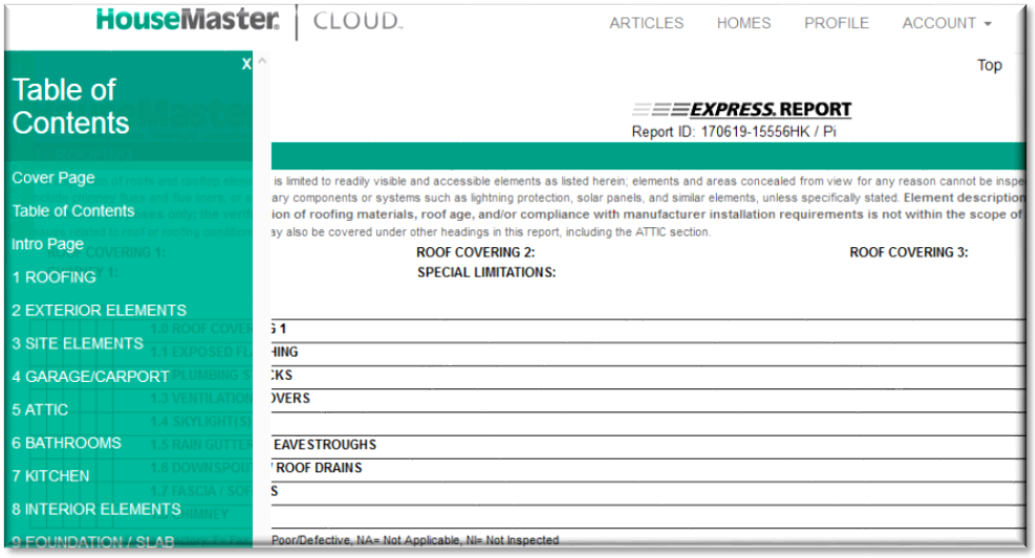


5. Report View Options

In addition to viewing the report, options are available from this screen to "Download PDF", "Send to ISN (a PDF copy)," "Print" the report, and Back (which will bring you to a list of all Company Reports). "Send to ISN" button on the report page will also send the report attachments to ISN.

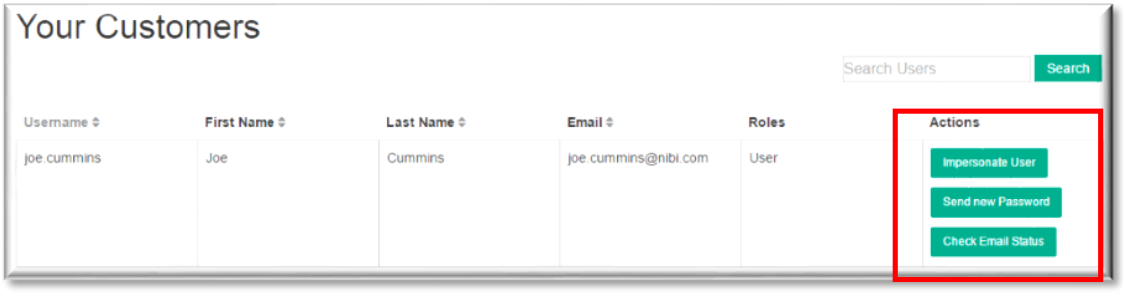


When a report is open, a tab will appear on the teh left side of te screen. Clicking on this will open an interactive, scrollable Table of Contents – if this feature is turned on as part of the printing option in the PCX-HG software. Clicking on the "X" in the upper right corner or anywhere outside it will close it.



C. MY CUSTOMERS

Select “My Customers” from the DASHBOARD dropdown menu and the following screen opens. This will only show customers and reports associated with the user (Franchisee or Inspector) who has logged in.



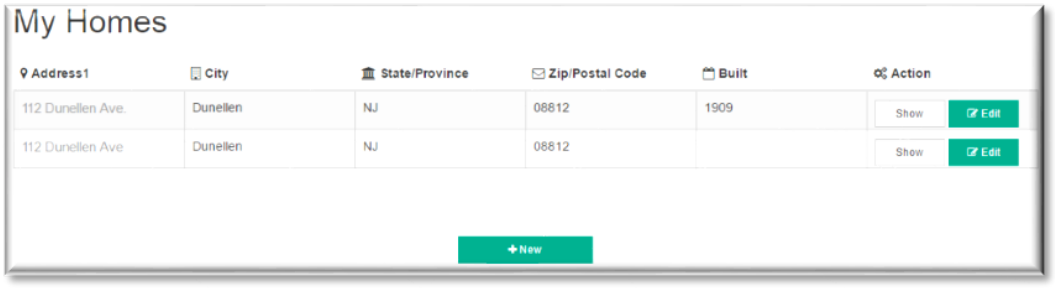
Actions available from this screen include:

1. Search for Users

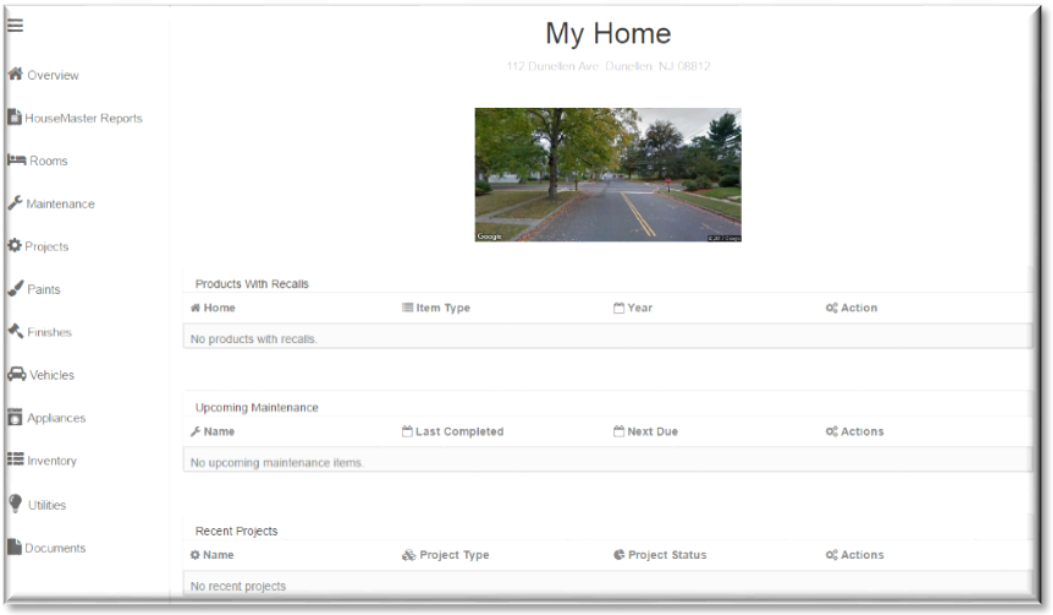
This allows a “Search” by username, name, or email address.

2. Impersonate User

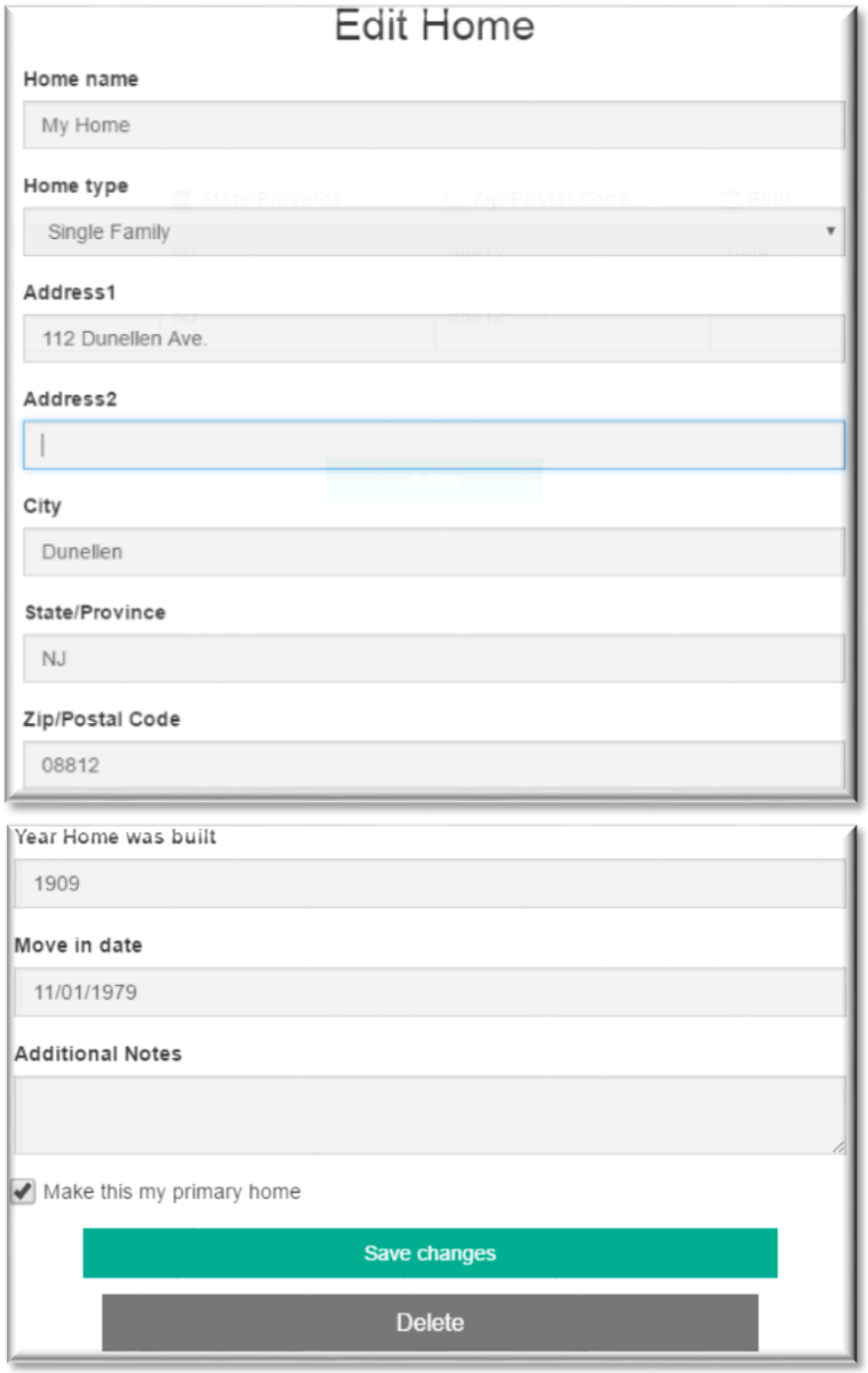
This allows a franchisee, office manager or Inspector to access a customer's account, as if they were the customer. Selecting "Impersonate" opens the following screen, with options to "Show" or "View" house information; "Edit" to add to or change house information; and "+New" to add another house to the list. Impersonating another party (customer or agents) will not affect the recording of actions taken by a customer or agent. If a customer only has one HouseMaster Report, they will be directed straight to the report when they click on "HouseMaster Reports."



a. Select "Show" or "View" to open "My (a Customer's) Home" data field. This gives access to all the information about a home, with all available features in the side menu, below an image (from Google) of the property. A picture of the house provided by the inspector in the General Info section of the report will appear with the report listing when the report is uploaded.



b. Select "Edit" to Open the following screen to add or change basic information about a Customer saved house.

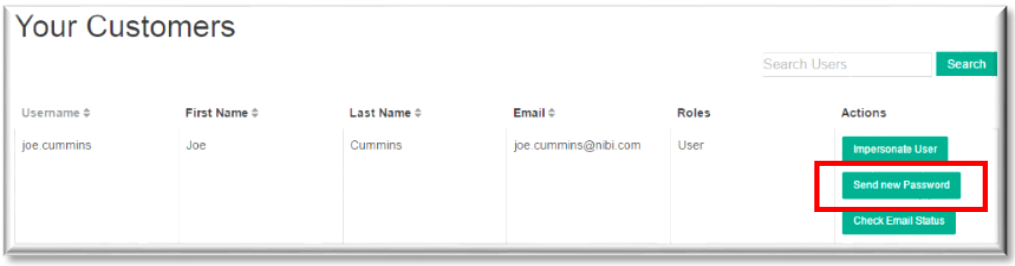


c. To exit "Impersonate," select the "Account" button.

Note: *If Impersonate is not exited before attempting another function, you will be directed to the CLOUD home page.*

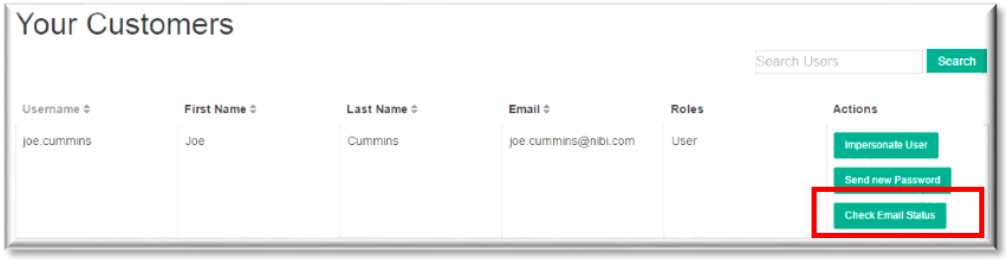
3. Send New Password

Selecting this option and the system will send a new password to the customer.



4. Check Email Status

Selecting this option will open a list of emails sent to the customer, with notice of whether they were Sent, Opened, Clicked, Bounced, or Blocked.



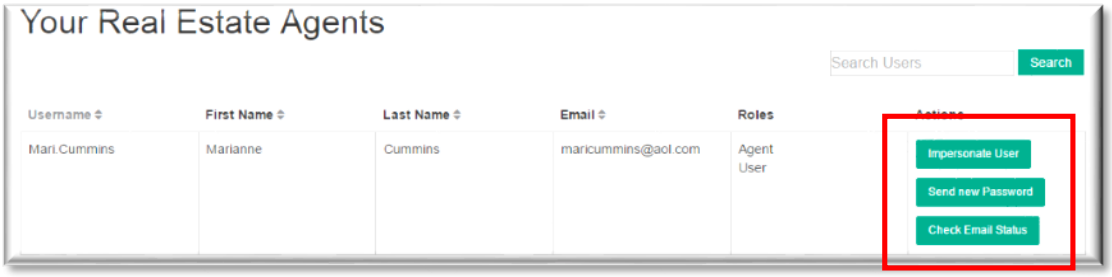
Email Status Key. Here are detailed explanations of the meaning of the status of email notification:

- **Queued:** The means the email has not yet been sent, it is in the "queue" of emails to be sent and will be sent shortly.
- **Sent:** This means the report delivery email was sent. They have not opened it yet.
- **Opened**: This means the report delivery email was opened. This doesn't necessarily mean the report was opened, just that the email was delivered and opened.
- **Clicked**: This means that the report delivery email was sent, opened, and then they clicked on the link in the report. This also doesn't necessarily mean that the actual report was opened, just that the email was delivered, and that they clicked on the link.
- **Bounced**: This means that the email was not delivered, usually due to either an incorrect email address, or problems with the Customer's email servers. I've also seen one case where the email provider blocked our email provider from sending them emails. If you have one with this status, you need to contact me, as you have in the past.
- **Blocked**: This also means that the email was not delivered, but that it was blocked by our email provider. This is usually caused by trying to deliver an email to an address that has had several bounced messages sent out to it, so our email server doesn't even try to send it. This can also be caused by an email address with a domain name that doesn't exist.

D. MY AGENTS

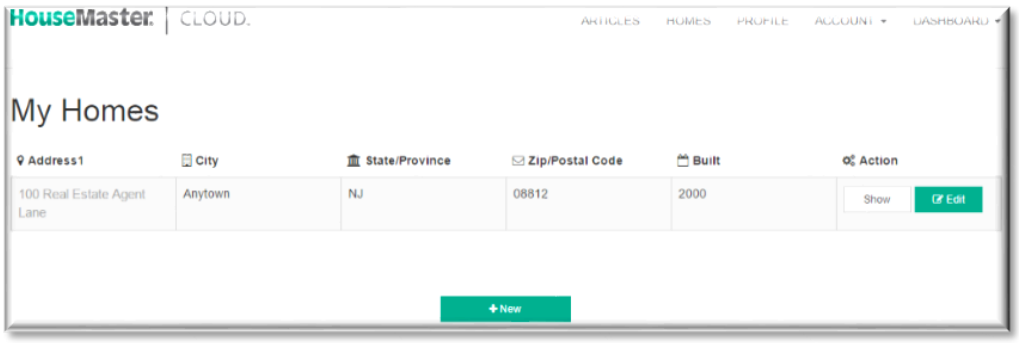
1. Search My Agent

Select “My Agents” from the DASHBOARD dropdown menu and the following screen opens showing all the Agents that have been added to your account. Select search to search for agents by username, name, or email address.



2. Impersonate User

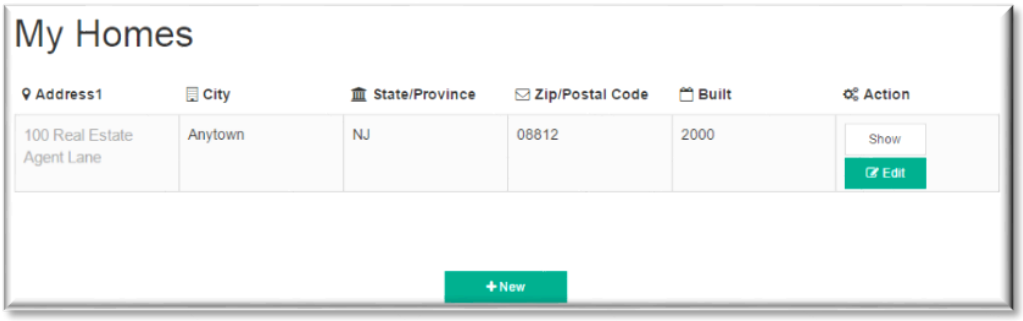
Select “Impersonate User” and the following screen opens to show the list of homes associated with the agent.



3. Show or View (to see Agent’s Own Home)

Select HOMES to view the impersonated agent’s list of homes, or select “Show” or “View” and a Dashboard dropdown option “My Reports” appears.

If “Edit” is selected, the process for editing a home is the same as explained for customers.



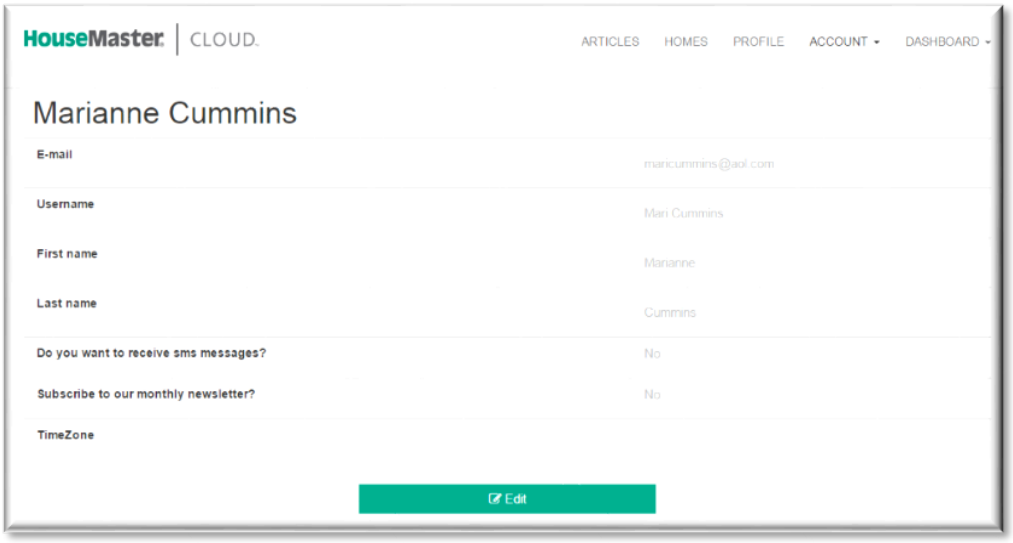
4. Select Agent's Reports

Select this button and a listing of all the HouseMaster Reports generated for that agent's customers will appear. From this screen an agent, or impersonator, can "Search" for reports, select "Show" or "View" to view reports, or Select "Your Home HouseMaster Reports" button to access reports that are associated with their own home (if they added one to their account). If "+ New" is selected, the process for adding a home and creating account information is the same as explained for customers.

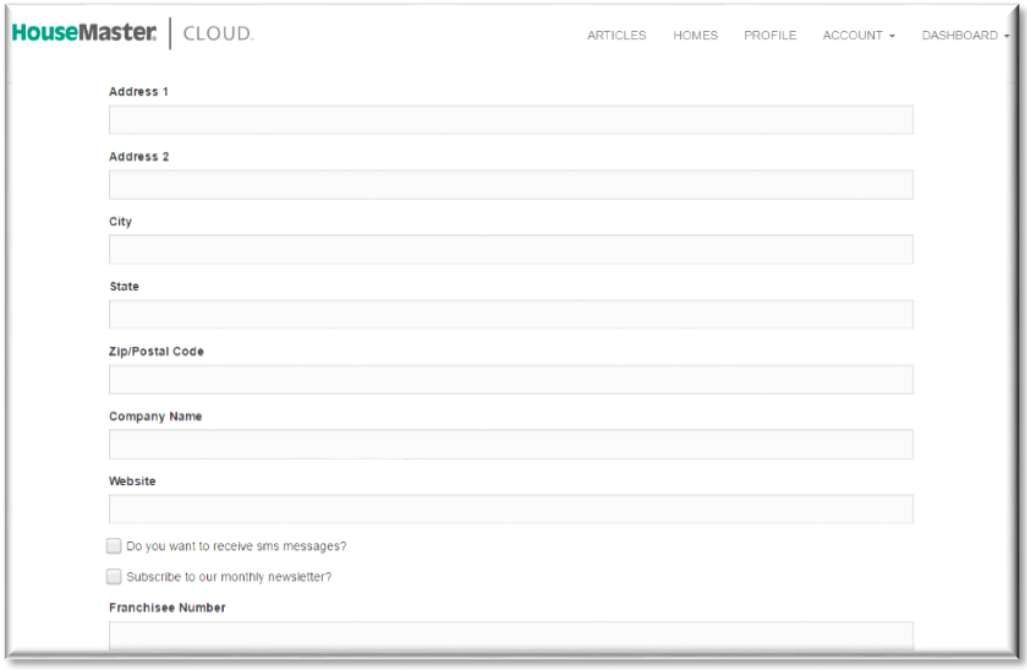
An agent account can be set up even before a customer's report is uploaded. This can be done by creating a sample or fictitious customer's report to upload, with the agent added.

5. Edit Agent Profile

Select PROFILE in main menu to open personal information about an agent to edit as desired. They can access the same profile information through their own log in. An agent's photo can also be added to their profile. Review Part I F. Creating Customer and Agent Accounts. A notification will be sent to the franchisee or Inspector when an agent has edited their profile.



a. Select “Edit” to expand the data field to add or change basic information.

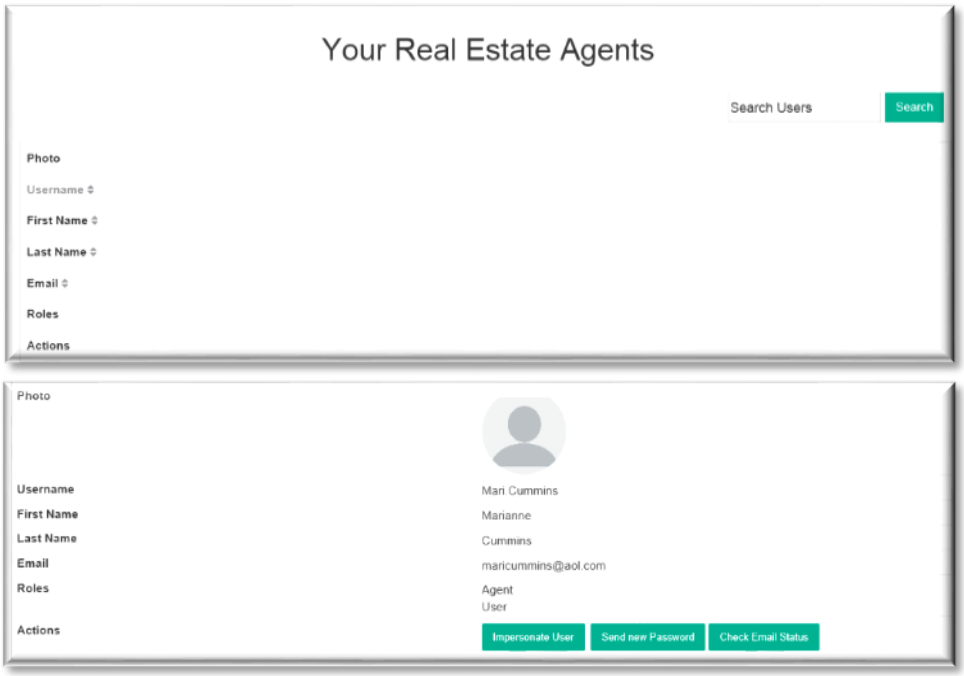


b. Select “Profile Photo” to browse computer files for a saved photo of the agent (jpeg). Once found, the impersonator or agent can select “Choose File” and “Save” to add it to the agent’s profile.

Note: The uploaded image must have a square format or it will not display properly.

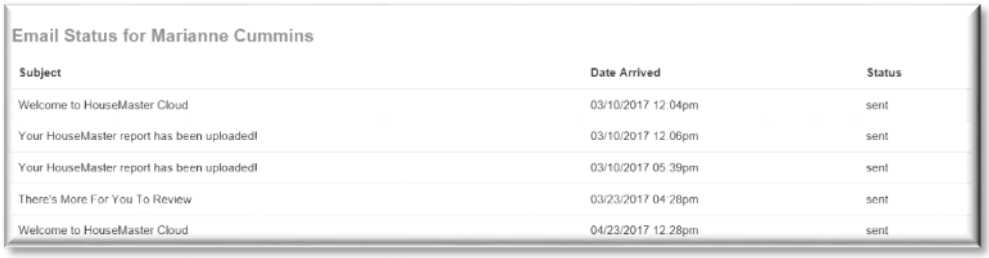
5. Send New Password

Selecting this option will send a new password to the Customer.



6. Check Email Status

Selecting this option will open a list of emails sent to the agent, with notice of whether they were Sent, Opened or Bounced.



Email Status Key

Review Part III Section C.4. “My Customers” for a detailed explanation of the status of email notifications.

7. Exit Impersonate

Select ”Exit Impersonate” to exit the My Agent data.

E. MY CLOUD TRANSFERS

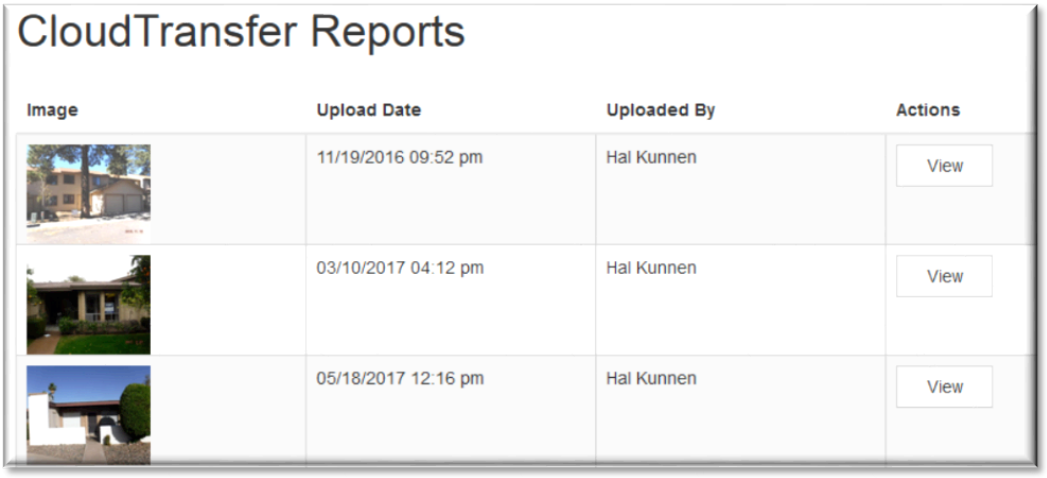
Note: Once an inspector has been setup on the HouseMaster CLOUD, their PCExpress-HomeGauge software (on the computer where the change was made) will no longer be linked to the HomeGauge servers for Cloud Transfers and Report Uploads. It will still be possible to log in to see reports, upload reports or perform all other previously available functions associated with a HomeGauge Internet Services Account if done from a computer with the HomeGauge software that hasn't yet been tied to the HM CLOUD.

1. Transfer REPORTS to CLOUD (from PCX-HG)

To transfer reports to the HM CLOUD," open *PCExpress*-HomeGauge (PCX-HG) software, select "Internet Services," enter you HM CLOUD Username and Password, and select "Send reports to CLOUD." A list of your reports will appear in a window. Select the reports to send to the CLOUD, and select Transfer. If successful, an email message will be sent confirming transfer.

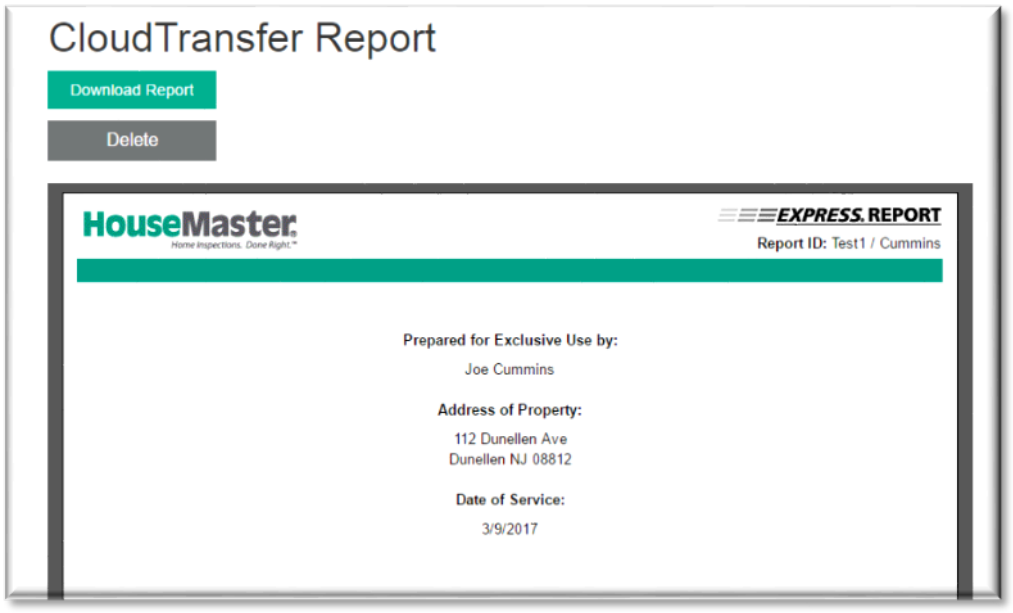
2. View Reports Transferred to CLOUD

Select "My CLOUD Transfers" and the screen below will open, showing a list of reports that have been transferred to the CLOUD for subsequent retrieval. If the Company Office Settings has transfer sharing turned on in Profile settings, the franchisee and office manager will see the CLOUD transfers for all Inspectors (limit ten (10) for each Inspector) and all Inspectors will be able to access any report on the CLOUD. (Previously all office transfers could only be viewed in the HomeGauge Cloud.)



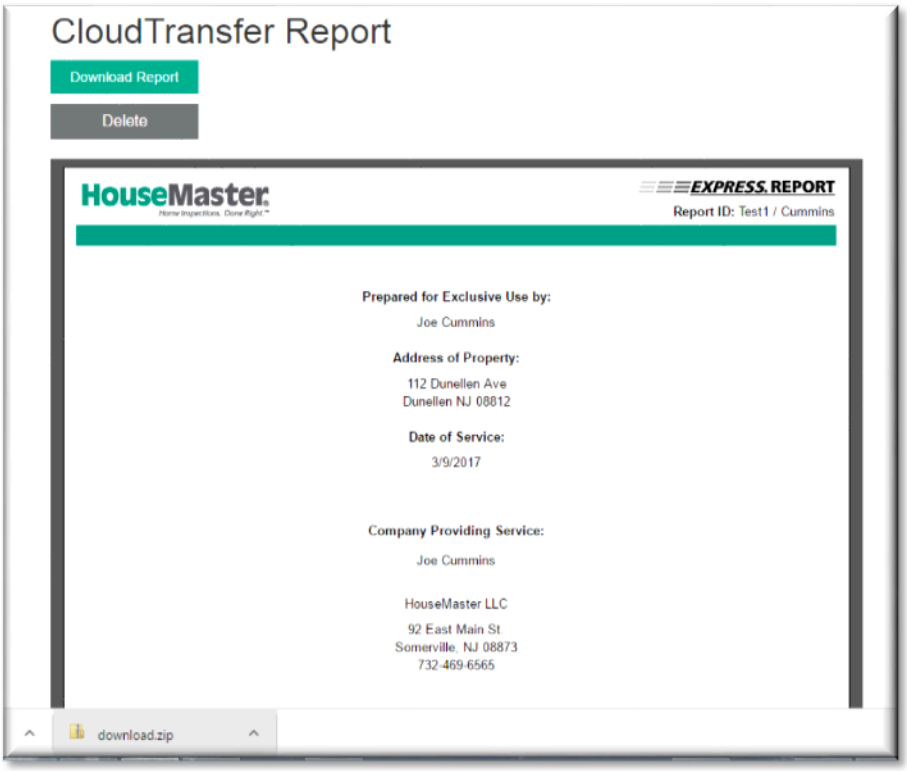
a. Show or View

Select “Show” or “View” and you can: View a Report, Download it, or Delete it.



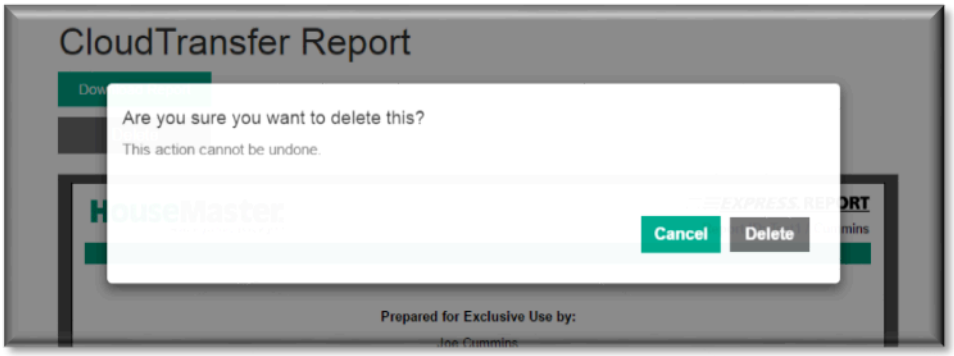
b. Download Report

Select “Download Report” to transfer a zipped file.



c. Delete Report

Select “Delete” and a warning message will appear allowing confirm the intention to delete a report from the list of transfers. Once a report is deleted from the CLOUD transfer list, it will not be recoverable from the CLOUD; however, it will still be available on the local computer.”



4. Transfer reports from CLOUD (to PCX-HG software)

To transfer reports in CLOUD back to an inspector’s the *PCExpress*-HomeGauge (PCX-HG) software, an inspector must open PCX-HG, select “Internet Services,” enter their HM CLOUD Username and Password, and select “Get Reports from CLOUD.” A list of your reports will appear in a window, allowing selection of the reports to be sent to the CLOUD. Selecting “Transfer.” Wil send it to the CLOUD and a message confirming the transfer will be sent to the inspector.

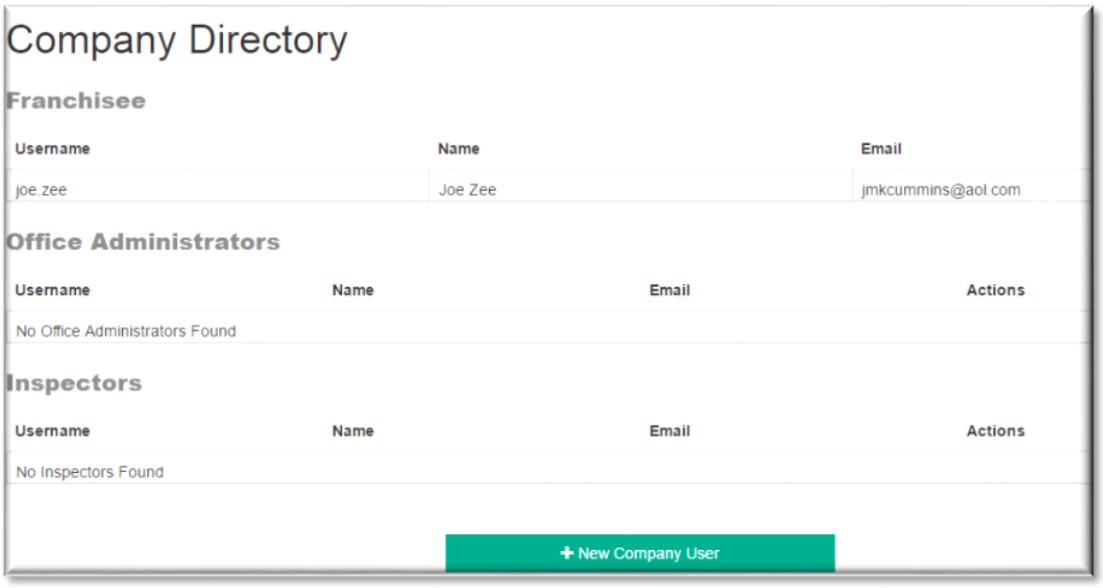
5. Transferring Settings and Templates

Even after conversion to the HM CLOUD, Inspectors can still upload and download Settings and Templates and Backup their Templates to the HG CLOUD, as has always been possible through the "Internet Services" menu in PCX-HG. However, all report transfers will only be associated with the HM CLOUD.

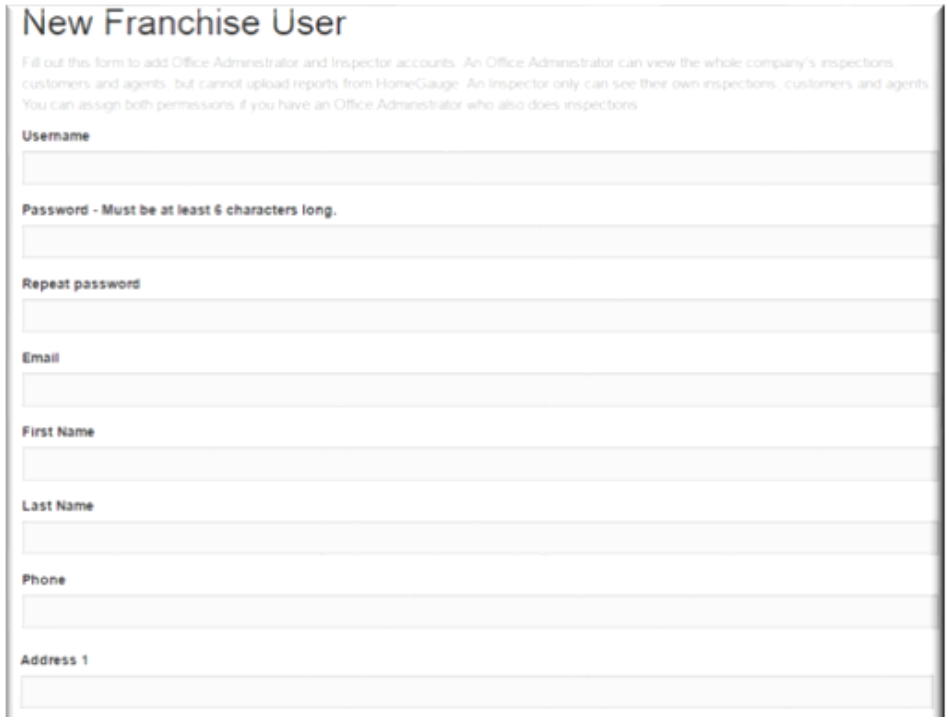
E. COMPANY DIRECTORY

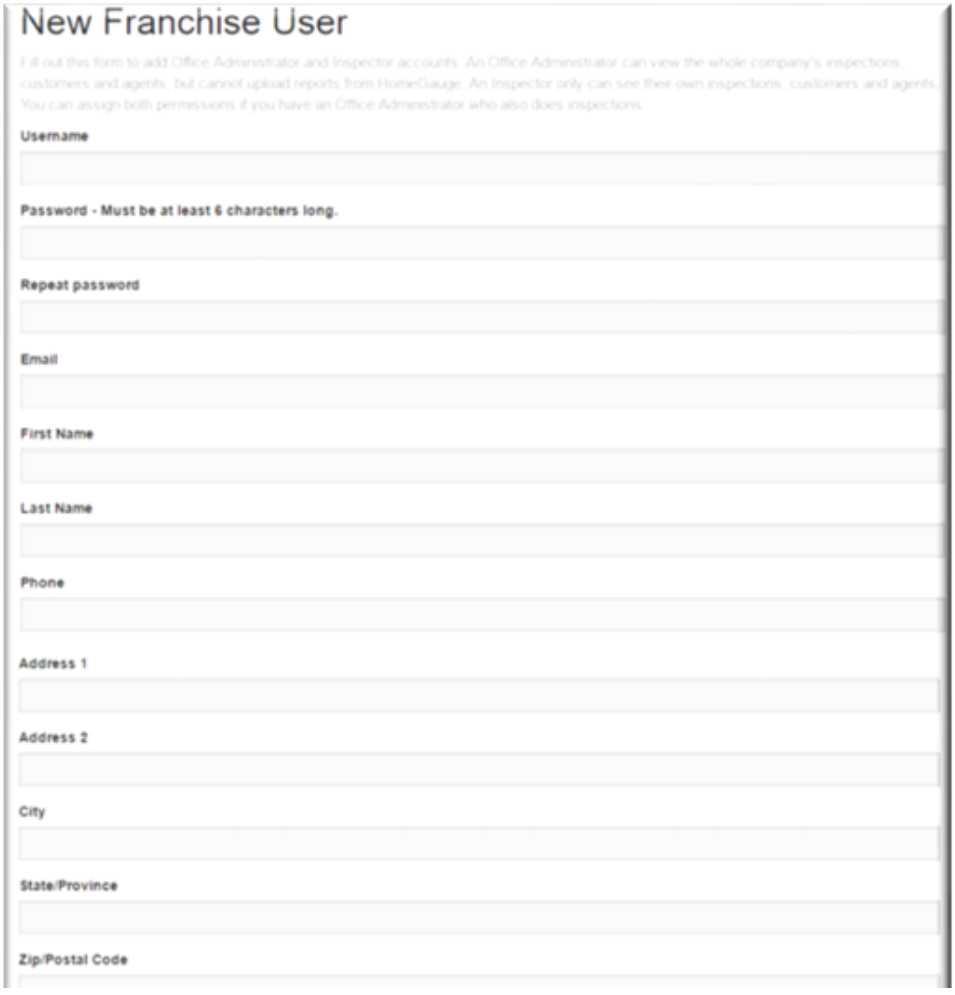
1. Company Directory

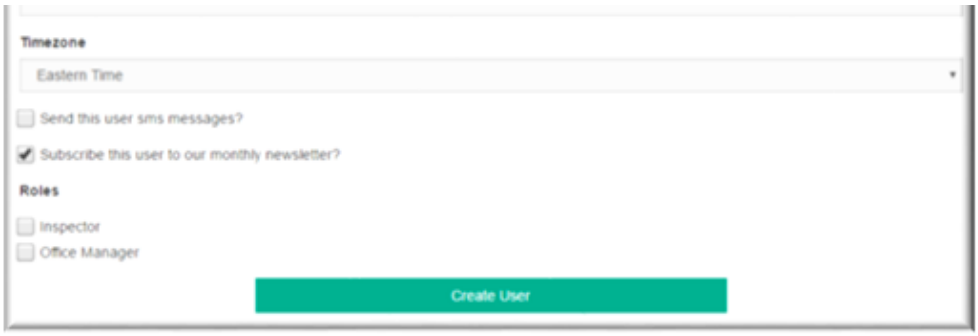
Selecting "Company Directory" allows a franchisee to add office administrators and inspectors to their Company listing.



2. Add a New Company User


New Franchise User
Fill out this form to add Office Administrator and Inspector accounts. An Office Administrator can view the whole company's inspections, customers and agents, but cannot upload reports from HomeGauge. An Inspector only can see their own inspections, customers and agents. You can assign both permissions if you have an Office Administrator who also does inspections.
Username
Password - Must be at least 6 characters long.
Repeat password
Email
First Name
Last Name
Phone
Address 1


New Franchise User
Fill out this form to add Office Administrator and Inspector accounts. An Office Administrator can view the whole company's inspections, customers and agents, but cannot upload reports from HomeGauge. An Inspector only can see their own inspections, customers and agents. You can assign both permissions if you have an Office Administrator who also does inspections.
Username
Password - Must be at least 6 characters long.
Repeat password
Email
First Name
Last Name
Phone
Address 1
Address 2
City
State/Province
Zip/Postal Code



G. COMPANY SETTINGS

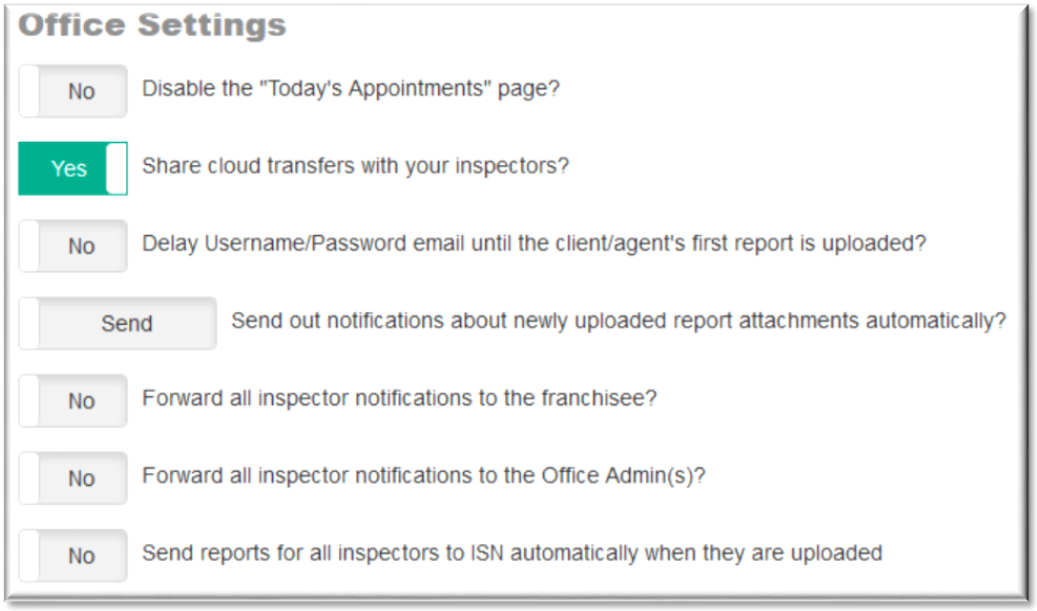
1. Manage Office Settings

Company office settings can be controlled from a "Manage Office Setting" feature. This section allows franchisees or office administrators to set various "Office Settings," such as whether to have "Today's Appointments" for the office and/or the sharing of CLOUD Transfers among all Inspectors turned on ("Yes") or off ("No"). There is also a setting to retroactively set default settings for inspectors added to a franchise before certain de setting features were available.

Note: Changes to settings will only be saved if the "Update" bar at the bottom of the screen is selected!

A. Office Settings

The "Manage Office Settings" options allows franchisees or office and Administrators to set defaults for several actions related to report delivery notifications and viewing permissions. These settings can be turned on or off to override individual inspector settings for the same features.



Office Settings Key:

- **Disable the "Today's Appointments" page.** The "Today's Appointments" page in its current form is only able to show all appointments for a franchise office, not just a specific inspector's appointments. If the setting is "No," all inspectors in a multi-Inspector office can see all the inspections and assignments. If this is not desired, select "Yes" so the daily appointments are not visible on the CLOUD.

- **Share CLOUD transfers from your Inspectors?** A "Yes" settings means all inspectors in an office can share report files sent to the CLOUD with other inspectors, which is convenient when merging reports or to review reports before they are uploaded. Select "No" to disable this feature and only allow transfers by specific username and passwords.

- **Delay Username and Password email until the Customer's or Agents first report is uploaded.** A "Yes" will prevent an email notice from going out that may confuse the Customer or Agent if an account has been created but the report has not been uploaded yet.

- **Send out notification about newly loaded report attachments automatically?** The default is "Yes." If set this way, no other action is needed on the part of the Inspector or Office manager when an attachment is uploaded to the CLOUD at a later date.

- **Forward all Inspector notification to the franchisee**. A "Yes" to forward Inspector notifications sends a copy of any of the notifications that an Inspector is set to receive to the Franchisee as well. (This includes emails such as ones received after uploading a report, Customer or Agent notifications are the sent, reports are opened, emails are clicked, bounced or block emails, etc.)

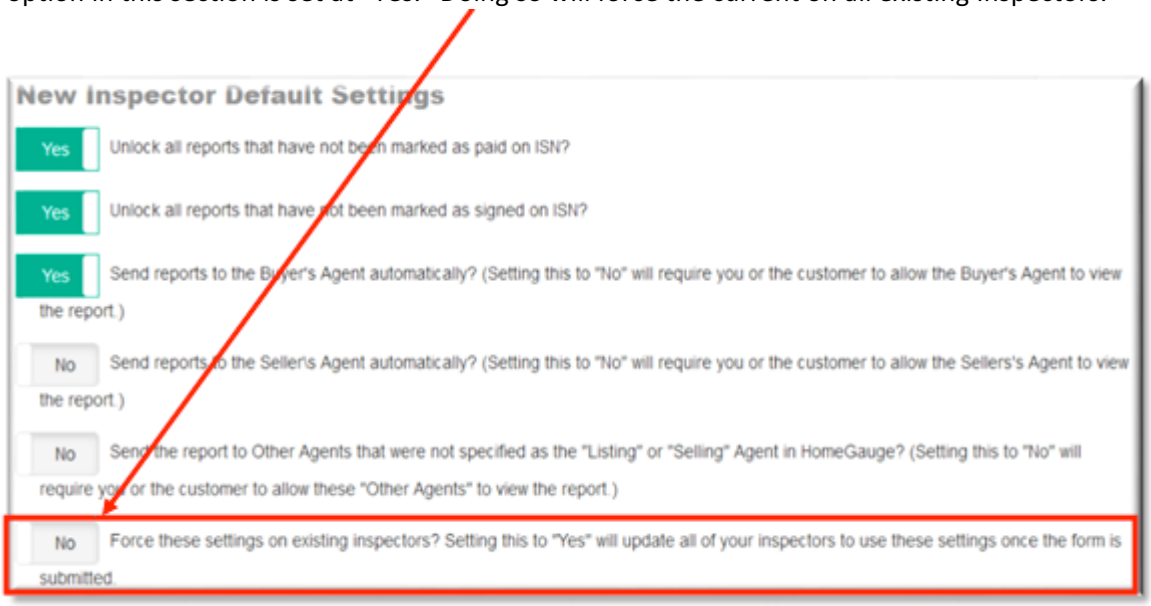
- **Forward all Inspector notification to the office administrator**. A "Yes" to forward Inspector notifications to the Office manager sends them a copy of any of the notifications that an Inspector is set to receive.

- **Send report for all Inspectors to ISN automatically when they are uploaded.** A "Yes" setting means all reports and their attachments will be automatically sent to ISN when they are uploaded to the CLOUD. Note, if reports or attachments are manually upload to the CLOUD at a later date, they will need to be sent to ISN manually.

NOTE: *Changes to settings will only be saved if the "Update" bar at the bottom of the screen is selected*

B. New Inspector Default Settings

This company settings feature was activated May 18, 2017 and will automatically affect CLOUD activity for new Inspectors added to an offices CLOUD account after that date. If Inspectors were set up on the CLOUD before the release of this feature, the "New Inspector Default Settings" will not apply unless the last option in this section is set at "Yes." Doing so will force the current on all existing Inspectors.



New Inspector Default Settings Key:

- **Unlock all reports that have not been marked as paid on ISN?** A "Yes" will allow customers to view uploaded reports even if not recorded as paid in the ISN account.

- **Unlock all reports that have not been marked as signed on ISN?** A "Yes" will allow customers to view uploaded reports even if not recorded as paid in the ISN account.

- **Send reports to the Buyer's Agent automatically?** Setting this to "No" will require the franchisee, office administrator, inspector or customer to change the setting to allow the buyer's agent to view the report.

- **Send reports to the Seller's Agent automatically?** Keeping this at the default setting "No" will require the franchisee, office administrator, inspector or customer to change the setting to allow the seller's agent to view the report.

- **Send the report to Other Agents that were not specified as the "Listing" or "Selling" Agent in HomeGauge?** Any user entered in the systems that is not designated as a customer or agent,

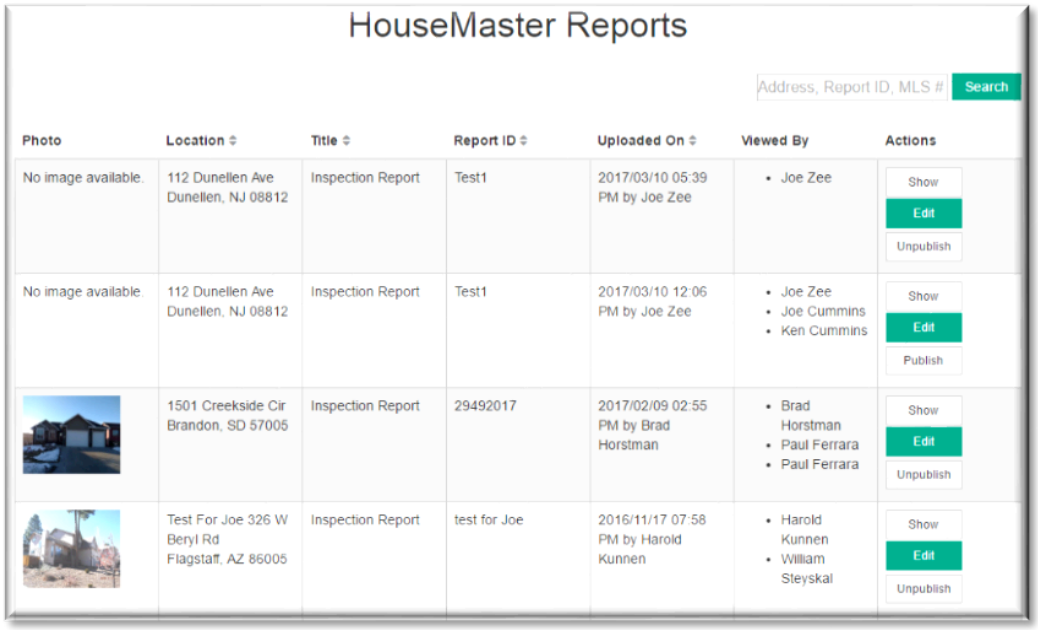
will be classified as “Unknown.” Keeping this at the default setting "No" will require a change to the setting to allow the seller’s agent to view the report.

- **Force these settings on existing Inspectors?** Setting this to "Yes" will update the settings for all of the inspectors with an office to use the “New Inspector Default Settings” despite prior settings made before this feature was added to the CLOUD.

H. COMPANY REPORTS

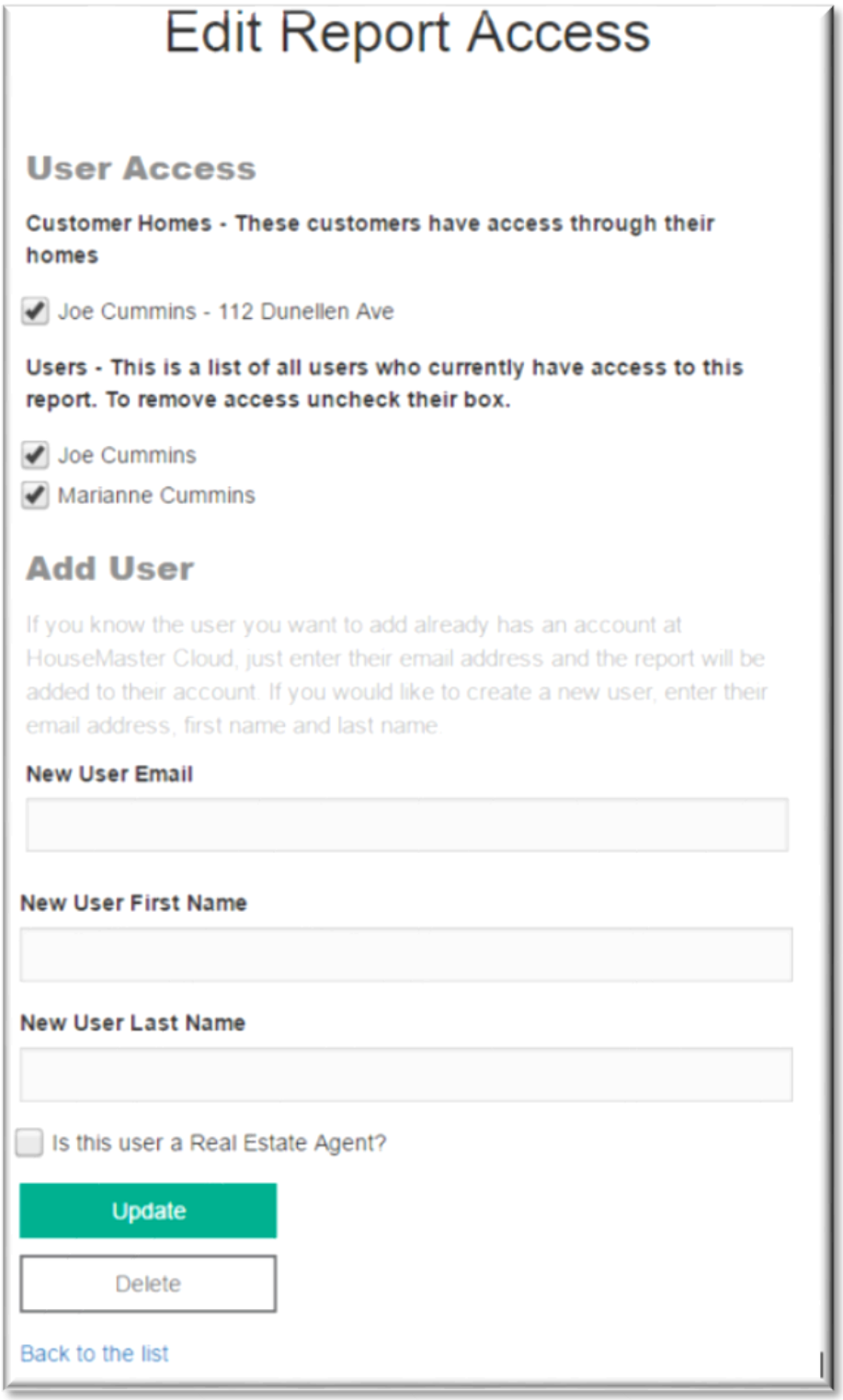
1. Company Reports

Select “Company Reports” allows viewing of all reports uploaded by Inspectors associated with an office.



2. Selecting Search, Show/View, Edit or Publish/Unpublish

Selecting these buttons allows a franchisee, office administrator or inspector to find a report, view a report, edit user access, add a new user, or identify whether the user is a real estate agent. These are all features previously reviewed in other sections of this guide.



3. Search for Reports

Search for a report by user, address, Report ID, or MLS# and other parameters.

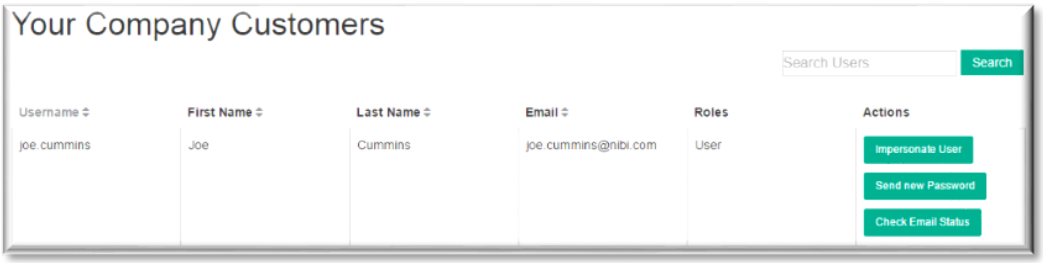
4. Adding a User

If a customer or agent already has a CLOUD account, by entering their email address a new report will be added to their account. To create a new user, enter the customer's or agent's mail address, first name and last name.

H. COMPANY CUSTOMERS

1. Company Customer List

Selecting the "Company Customers" opens a list of all customers created by an office administrator or inspectors.



2. Search Users

Search for users by entering their username, first name, last name, or email.

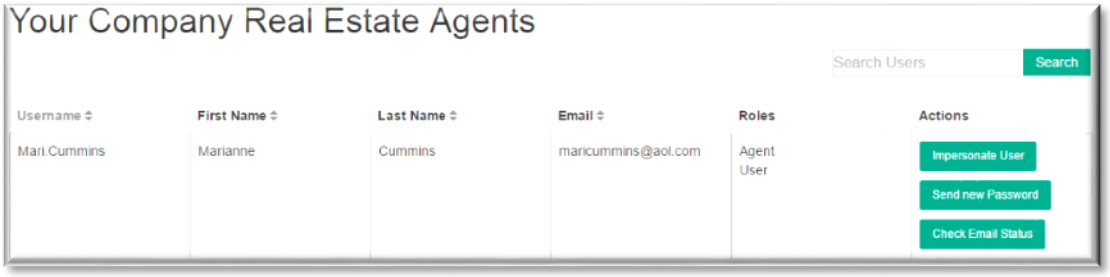
3. Selecting Impersonate, Send Password and Check Email Status

Selecting these buttons allows the impersonation of a user, ability to send a user a new password or check email status. These are all features previously reviewed in other sections of this guide.

I. COMPANY AGENTS

1. Company Agent List

Selecting the "Company Agents" opens a list of all agents created by an office administrator or inspectors.



2. Search Users

You can search for Agents by users by entering their username, first name, last name, or email.

3. Selecting Search, Impersonate, Send Password and Check Email Status

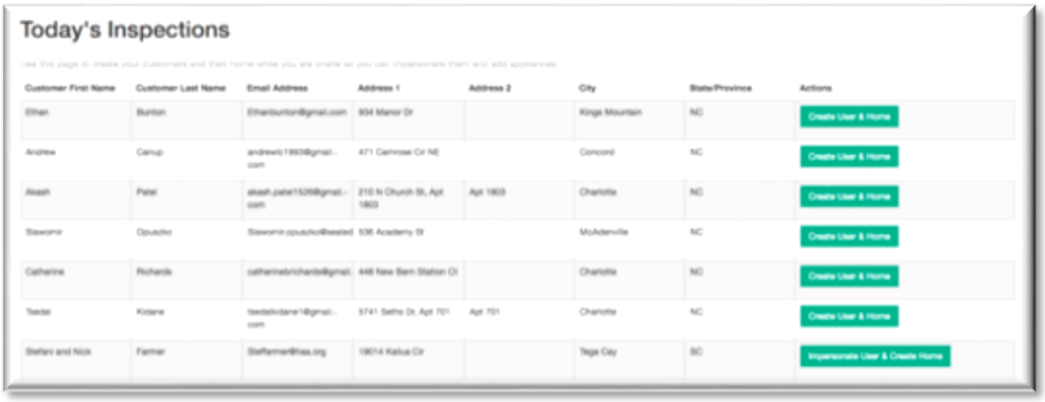
Selecting these buttons allows you to find a user, impersonate a user, send a user a new password and check email status. These are all features previously reviewed in other sections of this guide.

J. TODAYS APPOINTMENTS

1. Appointment List

Use this feature to create customer accounts and add their homes on the HM CLOUD at the time it is ordered or at the inspection. Once an account is created, a customer can be impersonated to add appliance information.

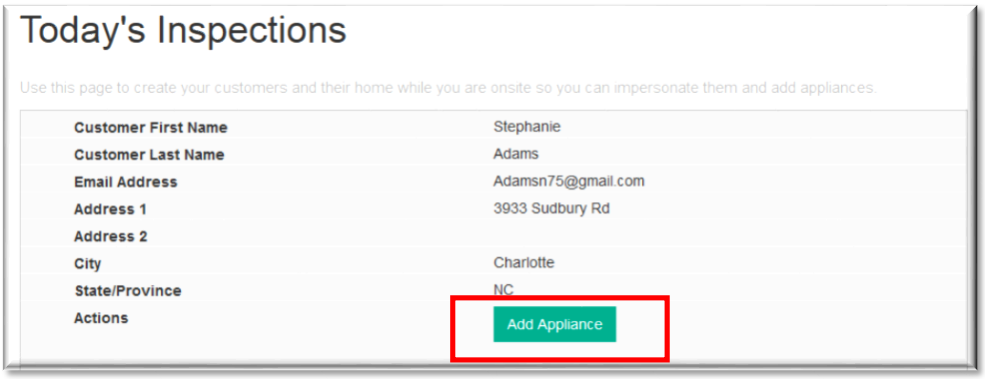
To create a home account for a customer or inspector to upload appliance information before a report is uploaded, it needs to be done from the “Todays Appointments” screen. An account can be created for a customer by completing the information in the PCX-HG software, but a CLOUD home account is not created until the report is uploaded.

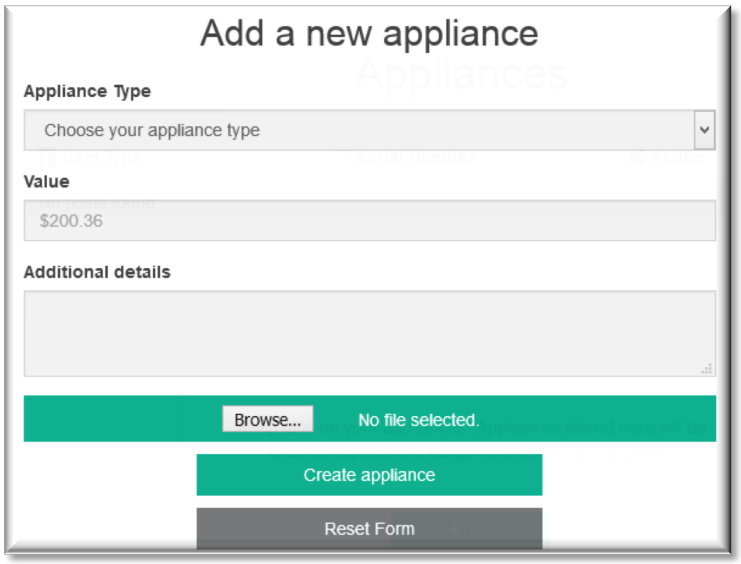


Note: This information is provided by ISN. HouseMaster and HM CLOUD has no control over the information ISN forwards or when ISN forwards it from its system.

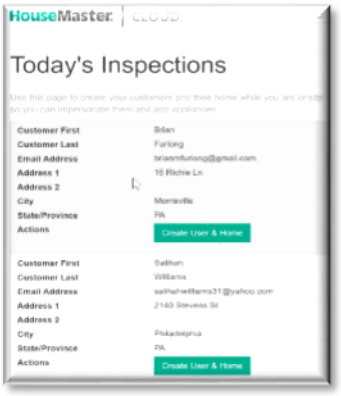
2. Appliance Button

A simplified the process for adding appliances from the "Today's Appointment" page has been included. If a user account hasn't been created yet, when the “Add appliance" button is selected, it will create a user account for the customer. If their home has not been created yet, it will also create the home. Once the account and home are created in the background, the inspector will be redirected to the page where new appliances can be automatically added via a photo of the label. (see Part I, K. Appliance Data Recording” for related information.





3. Cellphone View



Cellphone View

A separate icon for the "Today's Appointments Page" has been created so that both the HouseMaster CLOUD icon and the "Today's Appointments" page can be added to the homescreen on a phone to make it easier to add appliances from the field. To save these icons, navigate to the "Today's Appointments" page on your phone and then follow the instructions at this link: https://www.howtogeek.com/196087/how-to-add-websites-to-the-home-screen-on-any-smartphone-or-tablet/

PART IV: FAQs
FREQUENTLY ASKED QUESTIONS

Q: How do I start sending my reports to CLOUD.housemaster.com versus reports.housemaster.com?
A: You first have make sure you have a HouseMaster CLOUD account. You can register at CLOUD.housemaster.com. (top right, register). Once you have created your account contact CLOUDsupport@housemaster.com to setup an appointment to get onboarded.

Q: Once I'm signed up with HM CLOUD, how do I add my Inspectors?
A: Follow these steps

1. Login to your HouseMaster CLOUD account.
2. Click "Dashboard" -> "Company Directory".
3. Once there, click on "New Company User" at the bottom.
4. Fill out their user information and give them "Inspector", "Office manager" or both roles as applicable. Click Create User.
5. On the Inspector's computer, make sure HomeGauge is closed and go to https://housemaster.com/article/update-to-CLOUD and download the file listed in step on of that tutorial.
6. Run the file and click "Yes" or "Ok" on all the prompts you get.
7. If they use the HomeGauge companion, setup an appointment with Matthew or Chris to get it setup.

Q: I have a new computer; how do I get it setup with HM CLOUD?
A: Go to https://housemaster.com/article/update-to-CLOUD and follow the instructions.

Q: My companion isn't uploading after I switched to the CLOUD. Why?
A: Please contact Chris or Matthew to have them switch your settings file in your companion device.

Q: Can I choose which Agents get a copy of reports based on my Customer's instructions?
A: Yes. You will log into you CLOUD account select, PROFILE and add your preferences. One of the choices will be regarding Agents getting reports automatically. Select NO, which will allow you to control which Agents get reports. There is a setting in the CLOUD setup feature to control whether the buyer, listing and/or other parties not listed as either the buyer or seller Agent get a copy.

Q. I thought we can now add Agent information to our reports when downloading from ISN. But when I download from ISN, the Agent does not show up in the report, and if I manually add the Agent information in the PCX-HG software, the Agent information doesn't appear in CLOUD and they don't get a notification of upload or have access to the report.
A. If you download report data from ISN to PCX-HG, including Agent information, do not add the Agent information in the PCX-HG software manually. When downloading from ISN, the Agent data will automatically be added to the CLOUD files; but if you also add in in PCX-HG, the Agent information will not for to the CLOUD.

Q: Do Customers still go to reports.housemaster.com to retrieve their reports?
A: No. Once you turn on the CLOUD and your reports are being hosted in the CLOUD, you need to change your settings on housemaster com so that the ACCESS REPORT which will take them to the CLOUD OR they can simply go to CLOUD.housemaster.com. All emails about their report will direct them to CLOUD.housemaster.com.

Q: Once I'm signed up with HM CLOUD, how do I change the "Access Report" button on

housemaster.com to point to HouseMaster CLOUD?
A: Login to your housemaster.com account, go to your Dashboard and under "Account Info" click "Edit Account Info". The "Edit Account" form with appear. Make sure the 'Point "Access Report" link at HouseMaster CLOUD' checkbox is checked and click "Update". Now if your Customers/Agents are on housemaster.com with your widget loaded, the "Access Report" button will take them to CLOUD.housemaster.com.

Q: How is the username for my Customer or real estate Agent generated?
A: The username for all users is their email address. If you are creating the account through the ISN integration, this would be the email address pulled from ISN, or if you are creating the account through HomeGauge, the email you enter in PCX-HG. It is extremely important that the email address be spelled correctly. The number 1 reason for a Customer or Agent not receiving reports is a misspelled email.

Q. How is the password for my Customer or real estate Agent generated, and why is it so long?
A. The passwords to HouseMaster CLOUD are generated randomly from a prepopulated word list. The password will contain 4 words. The passwords are longer than they have been in the past to ensure that Customers have a secure account.

Q: How do I add additional test or inspection results i.e., radon test results, mold screening results, etc.?
A: Navigate to the report on HouseMaster CLOUD. Once there, under the "Report Attachments" list, click "New Report Attachment". Any attachment that is with the report when it is uploaded will show in this section as well.

Q: How does uploading appliance photos work? Who processes them etc.?
A: When you upload the photo, our back-office Agents will work on the details and provide a result. Our goal is to get this completed within 15 minutes during business hours (8-9 EST). We do sometimes get backed up, but are working on improving this project.

Q: Why does the picture of the home come from google maps?
A: If no picture is provided with the report upload a google images is used.

Q: How do I tell if my Agents/Customer have looked at reports?
A: Once logged in go to dashboard and choose reports, under any report, you can open the report and look to see who has viewed and who has not.

Q: Why doesn't the Agent picture come over from ISN?
A: Unfortunately our integration with ISN does not provide the Agent's photo along with the other Agent info. We are working to make this an easier process for you to upload and see these pictures.

Q: Why didn't the feature I requested yesterday get implemented yet?
A: Each request is put on list from most important to least. With emergency's being highest.

Q: Can I have more than one account with the same email address?
A: No. Each account must have its own email address.

Q: How can I add my Real Estate Agents to HM CLOUD so they can see its features?
A: The best way to handle adding Real Estate Agents is to add them to CLOUD as you produce inspections for them. You can also get them to CLOUD so they can see all the benefits by creating an account for them and uploading a sample report. If you want to add them without a report, find their

contact in HomeGauge, double click on it, navigate to the "HG User Name" tab and click "Create User Name". It will alert you that the username is already created. It's true that it was created in the HomeGauge Dashboard, but we'll need to create a new one for HM CLOUD. They will then get emails with their username & password, and will be able to create one home in HM CLOUD for free. If a Customer's report has been sent to an Agent, they can add their own home to CLOUD.

Q. What email notifications does the Customer and the Agent receive?
A. As soon as the account is created, the Customer receives an email welcoming them to the CLOUD, and containing their username (their email address) and their password. The Customer will receive a second email notification as soon as the report is uploaded.

Q: Can I change the message that goes out to my Customers and Agents when they get their report?
A: No, the marketing team has done a great job making sure that this email is professional, and includes the information needed for the Customer and Agent. If you have suggestions that you feel could benefit the system, we would love to hear them.

Q. When an unpaid report gets uploaded, but I chose the option in ISN to deliver anyway will it be delivered to the Customer?
A. No, unfortunately ISN does not communicate those exceptions to us. You have the option in each Inspector's profile to either block access to unpaid reports, or allow access. In either case, if you have an exception to your default, you will need to manually adjust it by either locking, or unlocking the report in your reports section of HouseMaster CLOUD.

Q. What does the setting regarding receiving "SMS Messages" mean?
A. This indicates whether you want to have a text messages sent to you for appliance ages. This will allow you to receive messages during the inspection in time to add it to the report if it can be deciphered in time.

Q. Will my Inspectors see all appointments for today?"
A. Yes, ISN has not provided a way for us to separate these out. Also, "I had an appointment scheduled recently and it doesn't show up in this list." Again, ISN doesn't provide last minute appointments for us to show in this list. This list will only show appointments that were scheduled at least a day in advance.