



Fcscontrol

Inspection Editing / Client Portal

Home Dave Demo [logout]
Thursday, June 2, 2016 9:19 AM



- Contacts
- Opportunity
- Calendar
- ToolBox
- Support

Waynes Bowling > Bowling Alley

Bowling Alley
123 Main Street
Wauconda, IL 60084
[add new contact](#)



Quick Tools:

Delete Aerial Button will remove the current aerial image

Edit Aerial & Outlines allow you to adjust the aerial image from Desktop

Plot Deficiencies allows you to edit the plot points for all Deficiencies

Install Chrome

Logging in

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Inspection editing

To edit the Inspection, click into the Client Portal icon

- Sections
- Notes
- Activities
- Opportunities
- Documents
- Pro

Total Sections: 1
Total Sq/Ft: 3,226

Map	Name
1	Main Roof

[Update Building Map References](#) [Include Checked Sections in Report](#)

Sites > Bowling Alley

Roofing + [Add section](#)

Site Name: Bowling Alley
Bowling Alley
123 Main Street
Wauconda, IL 60084

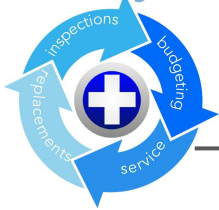
Overview [Google map](#)

[Sections](#) [Documents](#) [Budget Matrix](#) [Ops](#)

Total Sections: 1
Total Sq/Ft: 3,226

Map	Name	Sq/Ft	Estimated Install	Grade
1	Main Roof	3,226	1993	D

Updated 06/01/2016 04:10 PM [Download PDF](#)

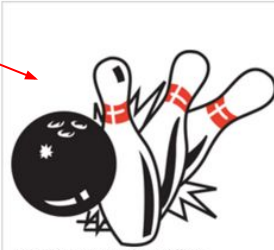


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Inspection Editing / Client Portal



Sites > Bowling Alley



Site Name: Bowling Alley

Bowling Alley
123 Main Street
Wauconda, IL 60084



[Overview](#)



Roofing

[Google map](#)



Manage Portal Users

Edit Mode

Reporting

Contact Form (for your customers to contact you)

Property aerial shows the sections and outlines

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Customer Logo

Address

Dispatch Service Button

Sections

Sections Documents Budget Matrix Ops

Total Sections: 1
Total Sq/Ft: 3,226

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Map ▲▼	Name ▲▼	Sq/Ft ▲▼	Estimated Install ▲▼	Grade ▲▼
1	Main Roof	3,226	1993	D

This is the Client Portal area which is where the Inspection lives.



Fcscontrol

Inspection Editing / Client Portal

Clicking into “Edit Mode” allows you to see different report options that will change the layout of your Inspection Report.

Report Options

Type: Budget

Lump Sum (remove line item costs)

Budget Matrix in Report? Yes

Cover Page: System

If using System Cover Page, what image would you like on the front? Overhead

Please select any Terms and Conditions files to attach to the end of the report Residential Terms (Reports) TOC's

Timestamp: Now Hide Custom

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Map	Name	Sq/Ft	Estimated Install	Grade
1	Main Roof	3,226	1993	D

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Inspection Editing / Client Portal

Budget vs Proposal option. If “Proposal” is selected the final page of your Inspection will have a signature line and turn your Inspection into a Repair Quote

Budget Matrix can be turned on and off here. If off, it will remove the budget matrix from the client portal also

Cover Pages can replace the FCS Default cover page with one you have uploaded in the Attachment Library tool found within the toolbox

You can attach “Terms and Conditions” that are uploaded to your attachment library tool which will appear at the end of your inspection pdf.

Report Options

Type:

Lump Sum (remove line item costs)

Budget Matrix in Report?

Cover Page:

If using System Cover Page, what image would you like on the front?

Please select any Terms and Conditions files to attach to the end of the report Residential Terms (Reports) TOC's

Timestamp: Now Hide Custom

Timestamp can be modified which is the timestamp shown on the Inspection PDF

Lump Sum option allows you to hide individual prices and show a total cost for emergency/remedial repairs on the Inspection PDF

Sites > Bowling Alley

Roofing

Site Name: Bowling Alley
Corporate Contact: None
Site Contact: None
Bowling Alley
123 Main Street
Woodstock, IL 60094

Report Options

Type:

Lump Sum (remove line item costs)

Budget Matrix in Report?

If using System Cover Page, what image would you like on the front?

Please select any Terms and Conditions files to attach to the end of the report Residential Terms (Reports) TOC's

Timestamp: Now Hide Custom

Update Report Options

Sections	Documents	Budget Matrix	Roof Replacement	Ops
Total Sections: 1				
Total SqFt: 3,226				
Map	Name	Sq/Ft	Estimated Install	Grade
1	Main Roof	3,226	193	D

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Inspection Editing / Client Portal



Sites > Bowling Alley



Site Name: Bowling Alley

Bowling Alley
123 Main Street
Wauconda, IL 60084



[Overview](#)



Roofing

Click into the Section you wish to make edits to

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Inspection editing

Sections Documents Budget Matrix Ops

Total Sections: 1
Total Sq/Ft: 3,226
Updated 06/01/2016 0

Map	Name	Sq/Ft	Estimated Install	Grad
1	Main Roof	3,226	1993	D

Bowling Alley
123 Main Street
Wauconda, IL 60084

Section: Main Roof
Size: 3225.7 sq/ft
Estimated Install: 1993
Overall Grade: D

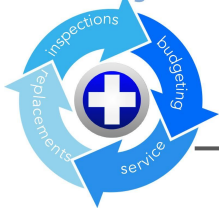
Roof Type:
Inspection Date: 06/01/2016
Inspector: Mike Williams

Site Name: Bowling Alley

Observations Condition Summary Recommendations

CC1 Test Cut 1

By going into the section you will see all of what was captured within the Inspection process



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Inspection Editing / Client Portal

All thumbnails can be clicked to enlarge

Observations - All of the observation photos and videos will be visible here

Recommendations - Your final grading with your recommendations will be here along with repair cost total and replacement budget

Install Chrome

Logging in

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Inspection editing

Composition - Will show your test cuts, click the image to make the picture larger and see more details

Condition Summary

Overall Grade: **D**

- A = 10 Years or more of service life remaining
- B = 8-10 Years of service life remaining
- C = 5-7 Years of service life remaining
- D = 2-4 Years of service life remaining
- F = Less than 1 Year of service life remaining

Estimated Replacement: 2018

Deficiencies

- General - Open Seams (Williams)
- Remedial: Quantity: 10 LF
- Deficiency: Open seam membrane are typically adhesives coupled with stress on the seams.
- Corrective Action: The area surrounding is cleaned. A new piece is

Please wait for your video to load

Video Overview: 1 Overview

Photos:

Condition Summary - All of the deficiencies captured will be shown here along with the plotted locations and pricing

Recommendations

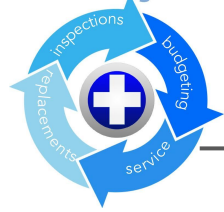
Overall Grade: **D**

- A = 10 Years or more of service life remaining
- B = 8-10 Years of service life remaining
- C = 5-7 Years of service life remaining
- D = 2-4 Years of service life remaining
- F = Less than 1 Year of service life remaining

Overall: the roof is in fair condition, may see leaks each time it rains. We recommend completing repairs mentioned in this report and completing bi annual maintenance to extend the life of this roof.

Estimated Repair Costs: \$2,774.06

Estimated Replacement Costs: \$22,579.90



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Inspection Editing / Client Portal

By clicking the gear icon you can begin to make edits to the Inspection information

Install Chrome

Logging in

Adding records

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Inspection editing



Bowling Alley
123 Main Street
Wauconda, IL 60084

Section: Roof Type:
Size: sq/ft Inspection Date: ?
Estimated Install: Confirmed Inspector: +
Overall Grade:

Site Name: Bowling Alley

Google Imagery ©2015, DigitalGlobe, U.S. Geological Survey

These fields can be edited, click the "Edit" button to save the changes

Edit test cuts below, save changes by clicking "update"

Composition Observations Condition Summary Recommendations

Add photo:
 No file chosen File:

[DELETE]

Metal
fiberboard
2" ISO
EPDM



Fcscontrol

Inspection Editing / Client Portal



In the Observations section you can edit the pictures and videos

Install Chrome

Logging in

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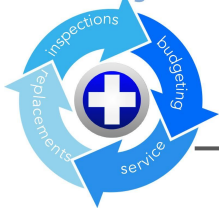
Add a drawing here which will be available to your customers who log into this portal

Upload additional pictures by clicking "choose file"

Edit the names and comments by clicking here

Rotate the image by clicking here

Include/exclude checking/unchecking this box



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Inspection Editing / Client Portal

All deficiencies added through the Inspection process can be edited. As you scroll down you will see them all as well as the corresponding plot points on the aerial image.



Edit Grading

Add additional Deficiencies here, and choose the category and title and the description/corrective action will auto-fill

Install Chrome

Logging in

Adding records

Activities

Inspections

Inspection editing

Edit descriptions, units, date recorded, emergency/remedial, pricing, and also indicate if the repair has been previously fixed. Select "update this deficiency when done"

Composition Observations **Deficiency Summary** Recommendations

Condition Summary

Membrane: C D

Flashings: C D

Sheet Metal: B D

Overall: D D

Estimated Replacement: 2018

Update Condition

Deficiencies

Add Deficiency:

Category: General D

Choose a Deficiency...

Photo: No file chosen

Name:

Quantity: LF Remedial Emergency

Deficiency:

Corrective Action:

Repair Cost: \$

Add Deficiency

Composition Observations **Deficiency Summary** Recommendations

Add Deficiency

General D

19 Open Seams

Name: Open Seams

Date: 12/22/2015

Quantity: 10 LF Remedial Emergency

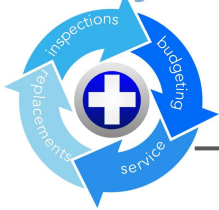
Deficiency: Open seams in the waterproofing membrane are typically caused by failing seam adhesives coupled with membrane shrinkage and stress on the seams.

Corrective Action: The area surrounding the open seam must be cleaned. A new piece of waterproofing membrane would be installed and sealed per industry standards.

Estimated Repair Cost: \$ 350.00

This deficiency has been fixed

Update This Deficiency Delete This Deficiency



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Inspection Editing / Client Portal

Recommendations

Repair vs Replace

Overall Grade

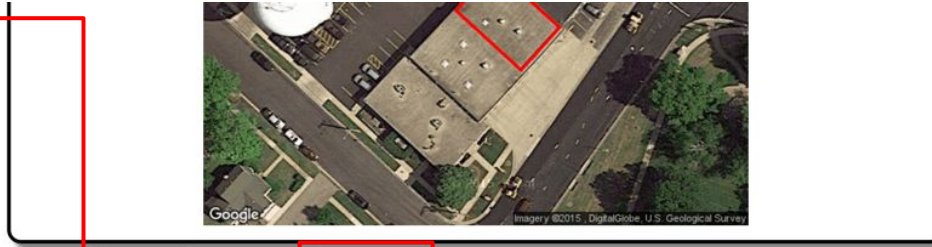
Replacement Date

Recommendations

Templates (Setup in Admin - Sales Settings)

Estimated cost per square foot to calculate total replacement cost
warning, if you change the value you need to clear out the replacement total first

Update Button when done editing



Composition Observations Condition Summary **Recommendations**

Recommendations

Type:

Overall:

Estimated Replacement:

Recommendations

Overall the roof is in fair condition, may see leaks each time it rains. We recommend completing repairs mentioned in this report and completing bi annual maintenance to extend the life of this roof.

Estimated Repair Costs: \$2,774.06 (calculated on Condition Summary Analysis)

Estimated Replacement Costs per sq/ft: \$

OR

Estimated Replacement Costs Total: \$

D
Overall Grade

A = 10 Years or more of service life remaining
B = 8-10 Years of service life remaining
C = 5-7 Years of service life remaining
D = 2-4 Years of service life remaining
F = Less than 1 Year of service life remaining

Install Chrome

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Inspection editing



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Inspection Editing / Client Portal

When your done making edits to the Inspection, We need to generate a NEW PDF document in order to see those changes.

Install Chrome

Logging in

Adding records

Activities

Inspections

Inspection editing

Click the "Site Name" link to go back to the property view

Bowling Alley
123 Main Street
Wauconda, IL 60084

Section: Roof Type:

Size: sq/ft Inspection Date:

Estimated Install: Confirmed Inspector:

Overall Grade:

Site Name: Bowling Alley

SERVICE DISPATCH

Sites > Bowling Alley

Roofing

Site Name: Bowling Alley

Bowling Alley
123 Main Street
Wauconda, IL 60084

SERVICE DISPATCH

Overview

Composition Observations Condition Summary **Recommendations**

Recommendations

Type:

Overall:

Estimated Replacement:

D

Overall Grade

A = 10 Years or more of service life remaining
B = 8-10 Years of service life remaining
C = 5-7 Years of service life remaining
D = 2-4 Years of service life remaining

Sections Documents Budget Matrix Ops

Total Sections: 1
Total Sq/Ft: 3,226

Map <input type="checkbox"/>	Name <input type="checkbox"/>	Sq/Ft <input type="checkbox"/>	Estimated Install <input type="checkbox"/>	Grade <input type="checkbox"/>
<input type="checkbox"/>	1 Main Roof	3,226	1993	D

Updated 06/01/2016 04:10 PM Download PDF



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Inspection Editing / Client Portal

Site Name: Bowling Alley
Corporate Contact:
Site Contact:
Bowling Alley
123 Main Street
Wauconda, IL 60084

Report Options

Type:

Lump Sum (remove line item costs)

Budget Matrix in Report?

Cover Page:

If using System Cover Page, what image would you like on the front?

Please select any Terms and Conditions files to attach to the end of the report. Residential Terms (Reports) TOC's

Timestamp: Now Hide Custom

Generate PDF button will create a new Inspection PDF

Sections	Documents	Budget Matrix	Roof Replacement	Ops
Total Sections: 1 Total Sq/Ft: 3,226				
Map	Name	Sq/Ft	Estimated Install	Grade
1	Main Roof	3,226	1993	D



Any final adjustments to the report should be made now

On the property page within the client portal, you want to be in edit mode which makes the generate PDF button visible. If your screen looks like below, click the gear button to change

Commercial

Sites > Bowling Alley

Roofing

Site Name: Bowling Alley
Bowling Alley
123 Main Street
Wauconda, IL 60084

Overview

Sections	Documents	Budget Matrix	Ops	
Total Sections: 1 Total Sq/Ft: 3,226				
Map	Name	Sq/Ft	Estimated Install	Grade
1	Main Roof	3,226	1993	D

Install Chrome

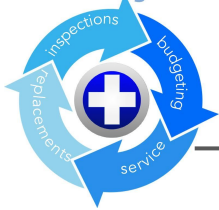
Logging in

Adding records

Activities

Inspections

Inspection editing



Fcscontrol

Inspection Editing / Client Portal

Site Name: Bowling Alley
Corporate Contact: None
Site Contact: None
Bowling Alley
123 Main Street
Wauconda, IL 60084

Report Options

Type: Budget
Lump Sum (remove line item costs):
Budget Matrix in Report?: Yes
Cover Page: System
If using System Cover Page, what image would you like on the front?: Overhead
Please select any Terms and Conditions files to attach to the end of the report: Residential Terms (Reports) TOC's
Timestamp: Now, Hide, Custom

Update Report Options

Map

Sections	Documents	Budget Matrix	Roof Replacement	Ops
Total Sections: 1				
Total Sq/Ft: 3,226				
Map	Name	Sq/Ft	Estimated Install	Grade
1	Main Roof	3,226	1993	D



Any final adjustments to the report should be made now

Generate PDF button will create a new Inspection PDF

Download PDF link is updated

Updated 06/02/2016 02:06 PM Download PDF

Grade **▲▼**
D

Dave Demo [logout]
Thursday, June 2, 2016 9:19 AM

Waynes Bowling > Bowling Alley

Bowling Alley
123 Main Street
Wauconda, IL 60084
[add new contact](#)

ID Status: Account Manager: Job Status: 1 Need Inspection
Roof Type: [NONE] CHANGE LOGO Budget Matrix: Yes

Sections Notes Activities Opportunities Documents Production Service Safety

Event	Date	For	Regarding	Notes
Note	06/02/16 02:06		Report PDF Generated	View Report
Note	06/01/16 04:10		Final Approval Email	See attached inspection report

Distributed by Roofing Company
129 E. Calhoun St
Woodstock, IL 60098
phone: 555-555-5555

Install Chrome

Logging in

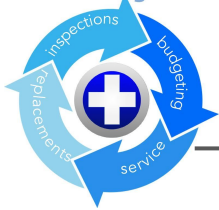
Adding records

Activities

Inspections

Inspection editing

Copy of PDF also stored within the "Notes" tab back in the Property



Fcscontrol

Inspection Editing / Client Portal - Email Report

Email generation will pull in contacts that are saved on the company/property level and can be selected through the "To" field. You can also BCC anyone in your company that is a user in the system

To:

Bcc:

Subject:

Message:

Good Afternoon Bob,
Thank you for the opportunity, see the below link for the Inspection Report.
Call with any questions,
Thanks

Words: 21

Attach

Report PDF Attach Inspection Report

Attachment Library

<input type="checkbox"/> Architect Colors	<input type="checkbox"/> Blank Service Agreement	<input type="checkbox"/> Brochures
<input type="checkbox"/> Brochures	<input type="checkbox"/> Client Portal User Manual	<input type="checkbox"/> FCS User MAnnual
<input type="checkbox"/> Firestone Brochures	<input type="checkbox"/> GAF Savings	<input type="checkbox"/> Inspection Report Cover
<input type="checkbox"/> RamonReportCover.pdf	<input type="checkbox"/> Residential Terms	<input type="checkbox"/> Residential Terms (Reports)
<input type="checkbox"/> Roof Colors	<input type="checkbox"/> Sample Report Cover.pdf	<input type="checkbox"/> Signature
<input type="checkbox"/> TOC's	<input type="checkbox"/> Warranty	

Include Signature

SERVICE DISPATCH

Commercial

Contacts Opportunity Calendar ToolBox Support

Manager: Job Status: 1. Need Inspection Roof Type: [NONE] CHANGE LOGO Budget Matrix: Yes

Make sure you select "Attach Inspection Report" which will pull your last generated PDF

DELETE IMAGE DELETE AERIAL EDIT AERIAL & SECTION OUTLINES PLOT DEFICIENCIES

Opportunities Documents Production Service Safety

ding Notes

PDF Generated [View Report](#)

Final Approval Email [See attached inspection report](#)

Distributed by Roofing Company

129 E. Calhoun St

Woodstock, IL 60098
phone: 555-555-5555

Install Chrome

Logging in

Adding records

Activities

Inspections

Inspection editing

Additional items can be included in your email which are items uploaded to your Attachment Library tool