

PDROS

pdrOS for Collision Safety Consultants of PA: start here

Everything John and Sharon need to run appraisal cases in pdrOS. Ask the chat, open a ticket, or read the guide below. The search box at the top finds any word on any page.

Printed October 5, 2026. The live guide, with search and the support chat, is the **Support** item in pdrOS's left menu.



On a phone: point the camera at the square, or type <https://pdros-guide.pages.dev/cscpa/> into the browser.

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What pdrOS is, in one page

Answers: what is pdrOS? what does it do for me? what do I have to do myself, and where on the screen?

pdrOS is an office employee trained on your cases. It types, sends, chases, counts and remembers. You decide.

What it does for you

- It makes the customer's contact profile when they sign up. It gives the case its RO number (your case number) and sends the welcome text and email.
- It asks the customer for the documents you need, and keeps asking on a schedule until they arrive.
- It emails the customer your range and the agreement. When they sign, it invoices the fee through Square and sends you a task.
- It emails the adjuster and the other appraiser as you, with the right PDFs attached, and chases them when they go quiet.
- It stops every chase the moment you record their answer (their number or their report), and tells you.
- It does the settlement arithmetic, emails the customer the summary, asks for the review and closes the case.
- It writes a note on the customer's contact profile for everything it does, with the time, so you can always see what happened.

What you do

Everything you do in pdrOS is one of three motions. All three happen in a field on the left side of the customer's contact profile.

1. **Upload a PDF.** Your report goes in **Upload Estimate Doc Here** ✂ (folder **Estimates**). The RTA goes in **RTA or demand PDF** (folder **CASE**). Their report goes in **Supplement #1 Upload Doc Here** ✂ (folder **Supplements**).
2. **Type a number or a date.** For example **Their number** ✂ and **My number** (folder **CARRIER & APPRAISER**), **Range low** and **Range high** (folder **CASE**), **Award amount** ✂ (folder **OUTCOME**).
3. **Set a Send switch** ✂ to **Send it now**. A Send switch is a list at the top of folder **CASE**; the guide calls it a switch. There are five, in the order a case uses them: **Send range**, **Send demand**, **Send our report**, **Send counter** and **Send summary**.

Each motion starts the right work. In this guide, every field or switch that starts work is marked ✂.

How to do any of the three

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. On the left side of the contact profile, scroll down to the folder and click the folder's name to open it.
5. Find the field.
6. Do its action. A PDF: click **Click to upload**, pick the PDF on your computer and click **Open**. A number: click in the box and type it. A date: click the box and pick the day. A Send switch: click the box under it and pick **Send it now**.
7. Click the blue **Save** button at the bottom of the left side. Nothing happens until you click it.

Between motions, you read your tasks. In the left menu, click **Tasks**. Click the task's row, then click **Open Full View**. When the step is done, click the green **Mark Complete** button at the bottom right. If the task is already gone when you come back, pdrOS closed it because the step happened.

Where the line is

pdrOS does the work where doing it for you is safe and saves time. Anything risky waits for you. Your range, your demand, your report, your counters and the settlement summary go out only when you set their Send switch. No figure is ever read for you from an email. You put the numbers in; the system sends, counts and remembers.

How much it saves

Think of one total loss today. You write the range email, the agreement and the invoice. You send the RTA with its attachments, two to four chase emails and two or three counters. You do the summary arithmetic, ask for the review and log every date. That is roughly an hour to an hour and a half of office work per case. With pdrOS it is about ten minutes of typing numbers and setting switches, and nothing is forgotten.

The one rule: every field does work

Answers: why does changing a field send something? when does a change count? can I use a field as a note? what if a step does not fit how I work?

In pdrOS a field is not a place to store a note. When you change a field and save it, the system acts on it, usually within one to two minutes.

What that means in practice

Every field below is on the left side of the customer's contact profile, inside the folder named. To get there: in the left menu, click **Contacts**. Click in the search box at the top of the list and type the customer's last name or RO number (your case number). Click the customer's name in the list. On the left side, scroll down to the folder named and click its name to open it.

- Typing **Their number** ✂ (folder **CARRIER & APPRAISER**) stops every chase email to the other side and gives you the Negotiate task.
- Picking **Send it now** in **Send demand** ✂ (at the top of folder **CASE**) emails the adjuster as you, with the attachments, and texts the customer.
- Uploading your report to **Upload Estimate Doc Here** ✂ (folder **Estimates**) moves the case and gives you the Set the range task.
- Typing an **Award amount** ✂ and an **Award signed date** ✂ (folder **OUTCOME**) texts and emails the customer that the claim is settled.
- Setting **Fee paid** ✂ (folder **CASE**) to anything but **No** closes the case and, if the case was won (Settled or Report only), asks the customer for a review. It does that only once the case has an **Outcome** (folder **OUTCOME**: Settled, Report only, or one of the endings). With no Outcome yet, it waits.

So: put the real thing in the real field, and only when it is true. Do not use a field as a scratch pad. Do not type a figure "to see what happens".

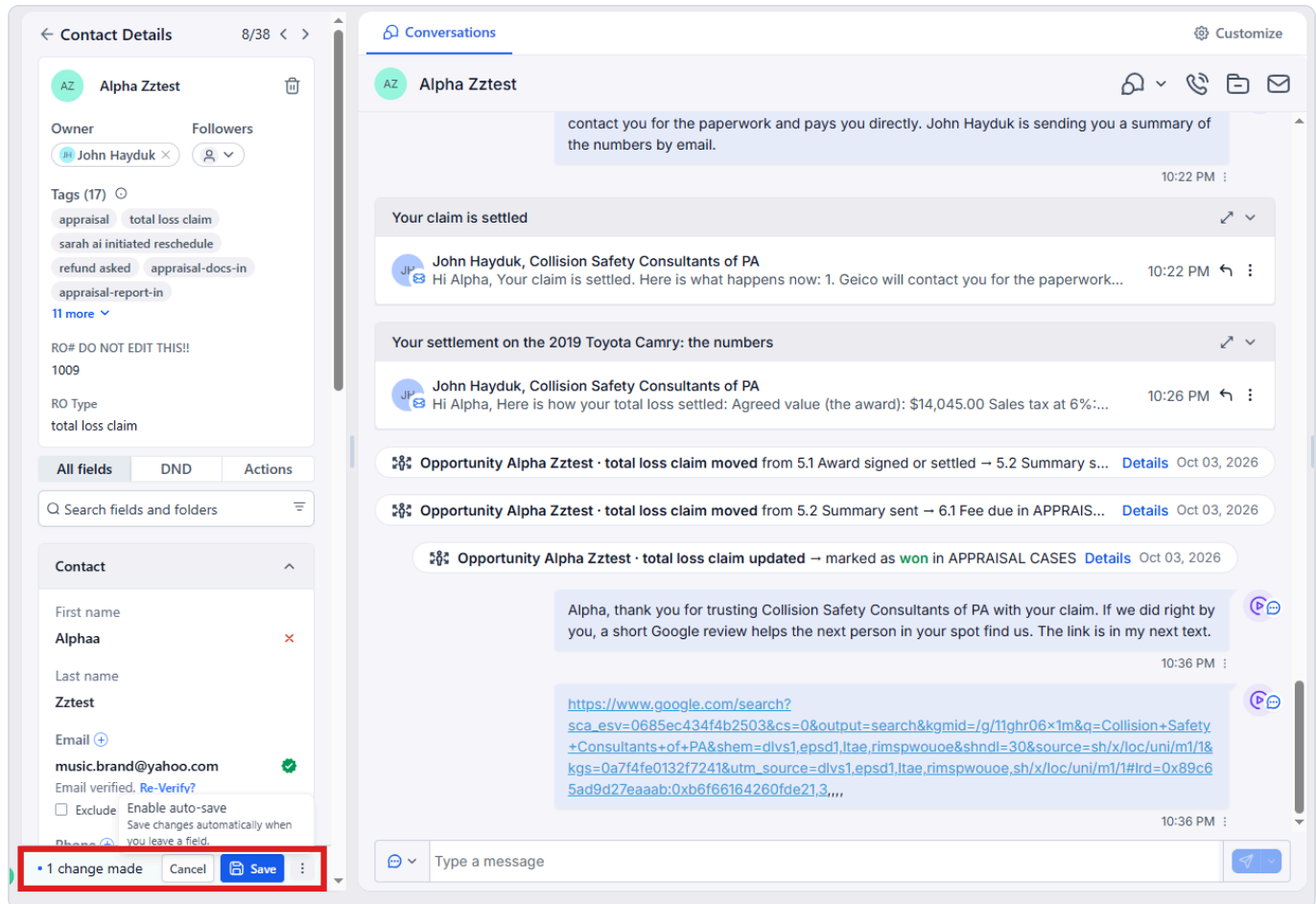
Throughout this guide, every field or switch that starts work is marked ✂ the first time it appears, with one line on what it starts.

Work with it, not against it

pdrOS was built around the way you described your cases to us. If you work the way the guide shows, the system does the typing, sending, chasing and remembering, and you keep the thinking.

If a step does not fit how you actually work, do not force it, skip it or work around it. Tell us ([Getting help](#)). We can change the step, the wording or the timing. A workaround on your side usually means a chase goes to the wrong person or a customer gets a message twice. A change on our side is usually

done within a day and holds for every case after.



Picture: A field just changed. The blue Save button at the bottom of the left side is circled. Nothing is saved until you click it.

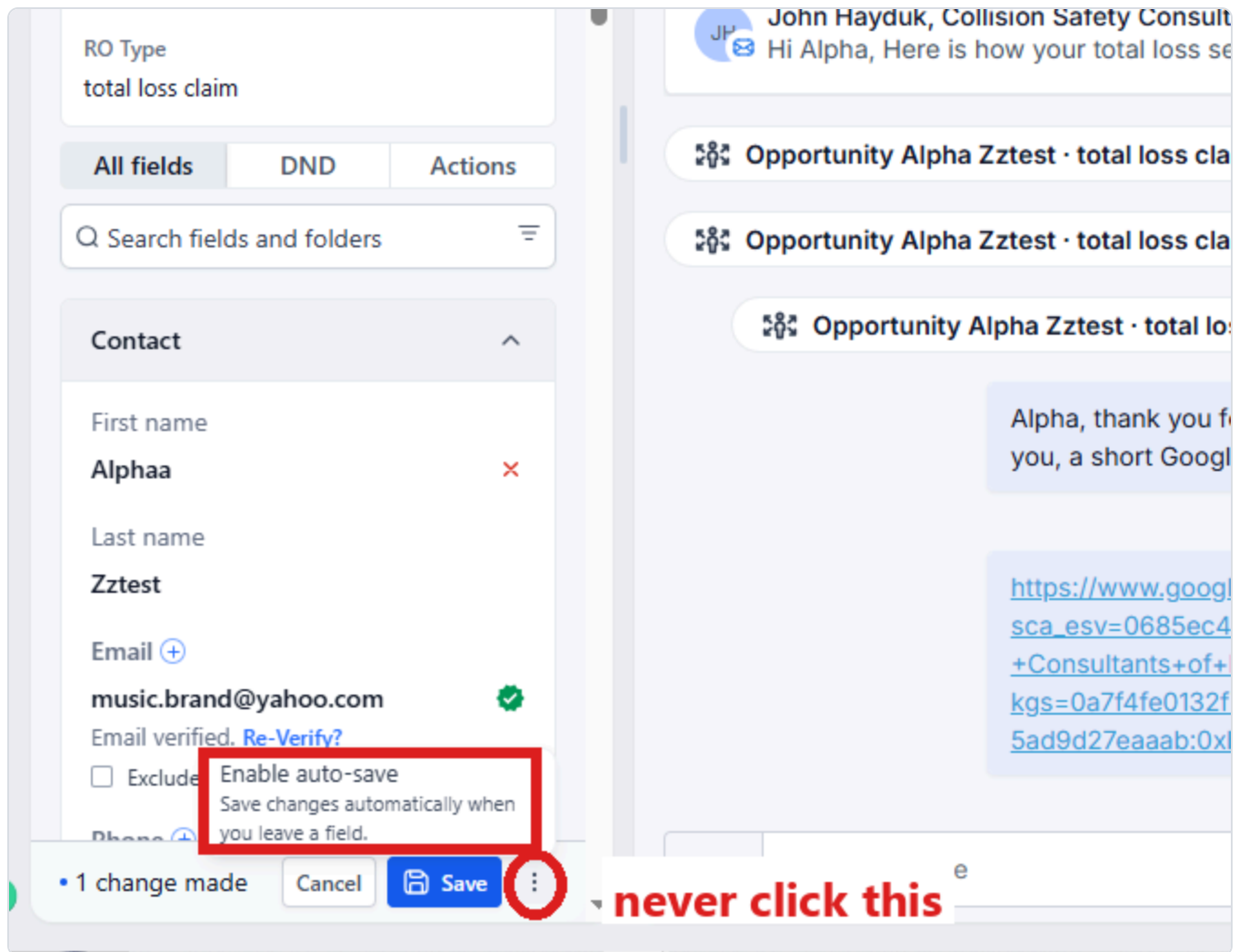
Two habits that keep you safe

1. Save after every change

Click the blue **Save** button at the bottom of the left side. It appears as soon as you change a field. Nothing happens and nothing is sent until you click it.

If you change a field and no blue **Save** button appears at the bottom of the left side, stop and tell us. Auto-Save has been switched on, and we switch it back. Until then pick Send switches carefully: they go the moment you choose.

Never click **Enable auto-save** (it is under the three dots next to the blue Save button).



Picture: The three dots next to the blue Save button, with Enable auto-save showing. The one thing never to click.

2. Read the newest note after an action

Stay on the customer's contact profile after you click **Save**. If you left it, open it again. In the left menu, click **Contacts**. Click in the search box at the top of the list and type the customer's last name or RO number. Click their name. You are in the right place when you see the customer's name at the top left and their texts in the middle.

1. On the far right edge of the contact profile, click the **Notes** icon (it looks like a pen; hold the mouse over the icons to see their names). The notes open beside it, newest at the top.
2. Wait up to two minutes and read the top note. It says what pdrOS did.

If no new note appears, see [When something goes wrong](#).

Your day: tasks in, tasks out

Answers: what do I do every day? where do I start in the morning? how do I finish a task? what do I not have to do any more?

Eighty percent of your time in pdrOS is one loop: open the Tasks page, read the top task, do what it says, click **Mark Complete**. New tasks appear as cases move.

My Tasks
Welcome back, John Hayduk [Admin](#)

[My Tasks](#) [All Tasks \(Admin\)](#)

Overdue **45** Due Today **14** This Week **17** Completed **0**

All Active Tasks (75 tasks) [Refresh](#)

☐ Documents in - value it - Test Five, Oct 1
@ John Hayduk

[Assigned to: John Hayduk](#)

CASE #1007 - total loss claim:

- Customer: Test Five, - (817) 961-1196 - music.brand@yahoo.com
- Vehicle: 2020 Lexus
- Insurer: Geico - Claim #: - Date of loss:

CASE DATA:

- Their offer: \$10,000.00...

[Open Full View](#) **click a row, then Open Full View**

Picture: The Tasks page: My Tasks, the four boxes Overdue, Due Today, This Week and Completed, and one task's preview with Open Full View circled.

The loop

1. In the left menu, click **Tasks**. **My Tasks** opens. You are in the right place when you see the four boxes **Overdue**, **Due Today**, **This Week** and **Completed** at the top.
2. Click the box **Overdue**. Its tasks list under it. Each box shows how many tasks are in it. (When those are done, click **Due Today**.)
3. Click the task's row. A short preview opens under it.

4. Click **Open Full View** to read the whole task. Every task tells you the case, the facts you need, and what to do in one to three steps (under **DO THIS**).
5. Click the link under **WHERE** (it follows the words "Open the case"). The customer's contact profile opens in a new browser tab. You are in the right place when you see the customer's name at the top left and their texts in the middle.
6. On the left side of the contact profile, scroll down to the folder the task names and click the folder's name to open it.
7. Find the field the task names.
8. Do its action. A PDF: click **Click to upload**, pick it and click **Open**. A number: click in the box and type it. A date: click the box and pick the day. A Send switch: click the box under it and pick **Send it now**.
9. Click the blue **Save** button at the bottom of the left side.
10. Click the browser tab with the Tasks page (the contact profile opened in a tab of its own).
11. Click the green **Mark Complete** button at the bottom right of the full view.
12. Click **Close** to go back to the list.

If the task is already gone when you come back, pdrOS closed it because the step happened. When a task says "Tick this task", it means: click **Mark Complete**.

pdrOS then does the next piece of work. When it is your turn again, a new task appears.

Most tasks need under two minutes. There is nothing to remember between them: the task carries what you need.

If you change a field and no blue **Save** button appears at the bottom of the left side, stop and tell us. Auto-Save has been switched on, and we switch it back. Until then pick Send switches carefully: they go the moment you choose. Never click **Enable auto-save** (it is under the three dots next to the blue Save button).

When your phone buzzes

A text to your phone means something time-sensitive happened. A new case, a customer signed, the other side answered, a deadline is near, a customer sounds unhappy, a switch did not go. The text says what. When there is a step for you, a task waits with the steps. The full list is in [Texts to your phone](#).

The text names the customer and the RO number (your case number). To open their contact profile: in the left menu, click **Contacts**. Click in the search box at the top of the list and type the name or the number. Click the customer's name in the list. You are in the right place when you see the customer's name at the top left and their texts in the middle.

What you do not have to do

- You do not chase documents, signatures, adjusters or appraisers. pdrOS does, on a schedule. It tells you only when a chase runs out.
- You do not write the range email, the RTA email, the counter email or the settlement email. You type the numbers; pdrOS writes and sends as you.
- You do not log the sent dates. pdrOS writes each one when the email goes. You pick a date only when a task or this guide asks (for example **Award signed date**).
- You do not answer "what's the status" texts. Sarah does, from what is on the customer's contact profile.

Sharon's day

Sharon gets her own tasks. One is entering the shop's estimate in CCC1 on a short pay. The rest are the office follow-ups Sarah creates (money question, wants a date, new details, a document, unhappy, needs a person). Same loop: the Tasks page, read, do, **Mark Complete**. Her page: [For Sharon](#).

Your first case, in order

Answers: what do I do first? what are the moves on a total loss, in order? where do I click for each move?

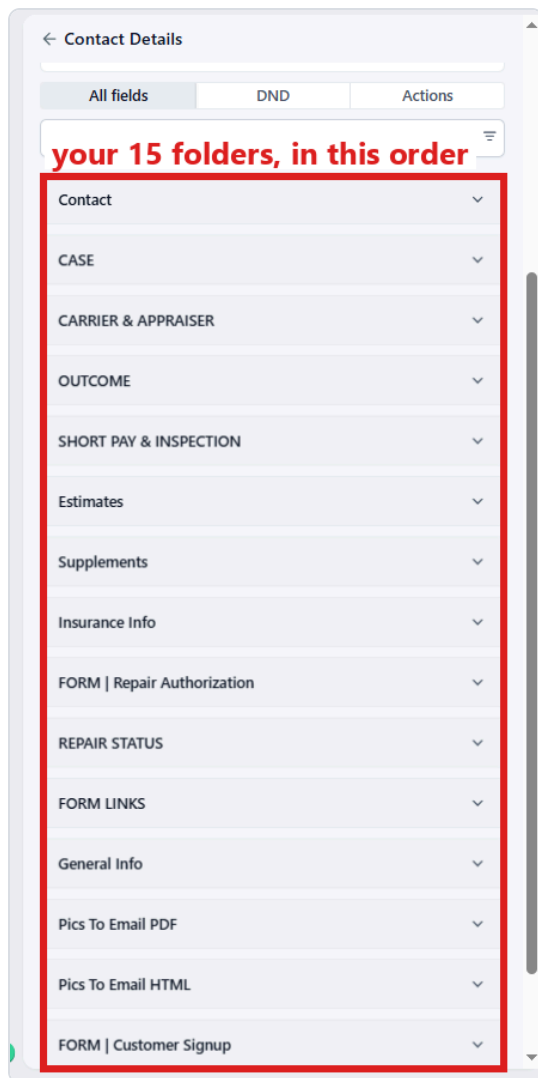
One total loss from signup to close is fourteen moves. Do them in this order. Each move says where to click, step by step, and links to the page with the detail.

Key: ✂ = this field starts work. RTA = your demand for appraisal (right to appraisal) PDF. Claim # = the insurer's claim number. RO number = your case number.

Before you start

- Eleven of the moves happen on the customer's contact profile. Each one starts from the left menu (steps 1 to 3). When a task brought you to the move, you can click the link under **WHERE** in the task instead. The contact profile opens in a new browser tab.
- To open a folder, click its name. If you can already see its fields under the name, it is open: do not click it again (that closes it).
- After each folder, click the blue **Save** button at the bottom of the left side. Then go on to the next folder.
- When a move has a Send switch, it is always the last step. The five Send switches are at the top of folder **CASE**.

If you change a field and no blue **Save** button appears at the bottom of the left side, stop and tell us. Auto-Save has been switched on, and we switch it back. Until then pick Send switches carefully: they go the moment you choose. Never click **Enable auto-save** (it is under the three dots next to the blue Save button).



Picture: The 15 folders on the left side of a contact profile, all closed, with the Search fields and folders box circled above them.

Move 1 • Sign the customer up

With the customer on the phone:

1. Open your **Signup** bookmark (the signup link; see [Your three links](#)). The **Appraisal Case Sign-Up Form** opens.
2. Fill the form as the customer talks. For **Repair Order Type**, pick **total loss claim**.
3. Ask "OK to text you updates?"
4. If they say yes, check the box **I agree to receive text messages about my case from this office**. **Reply STOP to opt out**. If they say no, leave it empty.
5. Click **Submit**. You are done when the form says "Thank you. We have your case".
6. If they said no, stop their texts straight away: in the left menu, click **Contacts**, click in the search box at the top of the list and type their last name, then click their name. At the top of the left side, click

the **DND** tab (next to **All fields**) and check **Text Messages**. It saves by itself. Then tell us the RO number (in the left menu, click **Support**, then the orange **Support Ticket** button); we keep them on email only.

Detail: [The signup form](#)

Move 2 · Wait for the documents

The customer uploads; pdrOS chases. Wait for the task **Documents in · value it**. It appears on your Tasks page (in the left menu, click **Tasks**).

Detail: [Step 1: the documents](#)

Move 3 · Upload your report

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. On the left side of the contact profile, scroll down to the folder **Estimates** and click the folder's name to open it.
5. In **Upload Estimate Doc Here** ↗, click **Click to upload**, pick your report on your computer and click **Open**.
6. Click the blue **Save** button at the bottom of the left side.

Detail: [Step 2: your report and the range](#)

Move 4 · Set the range and send it

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it.
5. Click in the box under **My number** and type your number (numbers only, no dollar sign).
6. Click the blue **Save** button at the bottom of the left side.
7. Scroll up to the folder **CASE** (just above **CARRIER & APPRAISER**). If its fields do not show, click the folder's name to open it.

8. Click in the box under **Range low** and type the amount (numbers only, no dollar sign).
9. Click in the box under **Range high** and type the amount (numbers only, no dollar sign).
10. Check **Carrier's offer** (same folder). If it is empty, click in the box under it and type the insurer's offer (numbers only, no dollar sign).
11. Click the blue **Save** button at the bottom of the left side.
12. Look at the top of folder **CASE**. **Send range** comes right after **Case status**, the first field.
13. Click the box under **Send range** and pick **Send it now** from the list.
14. Click the blue **Save** button at the bottom of the left side.

Detail: [Step 2](#)

Move 5 • Wait for the signature

Wait for the task **Send the demand**. (The customer signs; the invoice goes.) It appears on your Tasks page.

Detail: [Step 3: the agreement and the fee](#)

Move 6 • Send the demand

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. On the left side of the contact profile, scroll down to the folder **Insurance Info** and click the folder's name to open it.
5. Check **Claim #**. If it is empty, click in the box under it and type the insurer's claim number.
6. If you changed it, click the blue **Save** button at the bottom of the left side.
7. Scroll down to the folder **FORM | Repair Authorization** and click the folder's name to open it.
8. Check **Date of Loss**. If it is empty, click the box under **Date of Loss** and pick the day in the calendar that opens.
9. If you changed it, click the blue **Save** button at the bottom of the left side.
10. Scroll up to the folder **CARRIER & APPRAISER** and click the folder's name to open it.
11. Click in the box under **Adjuster name** and type the name.
12. Click in the box under **Adjuster email** and type the email.
13. Click the blue **Save** button at the bottom of the left side.

14. Scroll up to the folder **CASE** (just above **CARRIER & APPRAISER**). If its fields do not show, click the folder's name to open it.
15. In **RTA or demand PDF**, click **Click to upload**, pick your RTA on your computer and click **Open**.
16. Click the blue **Save** button at the bottom of the left side.
17. Scroll up to the top of folder **CASE**. The Send switches sit at the top of folder **CASE**, right after **Case status**.
18. Click the box under **Send demand** ⌵ and pick **Send it now** from the list.
19. Click the blue **Save** button at the bottom of the left side.

Detail: [Step 4: the RTA](#)

Move 7 · Their appraiser calls

When their appraiser calls:

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it.
5. Click in the box under **Other appraiser name** and type the name.
6. Click in the box under **Other appraiser email** and type the email.
7. Click the box under **Other appraiser contact date** ⌵ and pick the day in the calendar that opens.
8. Click the blue **Save** button at the bottom of the left side.

Detail: [Step 5: the other appraiser](#)

Move 8 · Send your report to their appraiser

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it. The Send switches sit at the top of folder **CASE**, right after **Case status**.
5. Click the box under **Send our report** ⌵ and pick **Send it now** from the list.
6. Click the blue **Save** button at the bottom of the left side.

Detail: [Step 5](#)

Move 9 • Their figure comes in

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.

If they gave you a figure:

1. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it.
2. Click in the box under **Their number** ✎ and type their figure (numbers only, no dollar sign).
3. Click the blue **Save** button at the bottom of the left side.

If they sent their report instead:

1. On the left side of the contact profile, scroll down to the folder **Supplements** and click the folder's name to open it.
2. In **Supplement #1 Upload Doc Here** ✎, click **Click to upload**, pick their report on your computer and click **Open**.
3. Click the blue **Save** button at the bottom of the left side.

Detail: [Step 6: negotiation](#)

Move 10 • Send your counter

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it.
5. Click in the box under **Counteroffer** and type your counter (numbers only, no dollar sign).
6. If you want one line of reasoning in the email, click in the box under **Negotiation note** and type it (optional).
7. Click the blue **Save** button at the bottom of the left side.

8. Scroll up to the folder **CASE** (just above **CARRIER & APPRAISER**). If its fields do not show, click the folder's name to open it. The Send switches sit at its top, right after **Case status**.
9. Click the box under **Send counter** ⌵ and pick **Send it now** from the list.
10. Click the blue **Save** button at the bottom of the left side.

Repeat this move until you agree.

Detail: [Step 6](#)

Move 11 · If you cannot agree

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it.
5. Click the box under **Umpire** ⌵ and pick **Called** from the list.
6. Click the blue **Save** button at the bottom of the left side.

Detail: [Step 7: the umpire](#)

Move 12 · The award

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. On the left side of the contact profile, scroll down to the folder **OUTCOME** and click the folder's name to open it.
5. Click in the box under **Award amount** ⌵ and type the amount (numbers only, no dollar sign).
6. Click the box under **Award signed date** ⌵ and pick the day in the calendar that opens.
7. Click the blue **Save** button at the bottom of the left side.

Detail: [Step 8: the award](#)

Move 13 · Check the figures and send the summary

1. In the left menu, click **Contacts**.

2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. On the left side of the contact profile, scroll down to the folder **Insurance Info** and click the folder's name to open it.
5. Check **Deductible**. If it is wrong or empty, click in the box under it and type the right amount (numbers only, no dollar sign).
6. If you changed it, click the blue **Save** button at the bottom of the left side.
7. Scroll up to the folder **OUTCOME** and click the folder's name to open it.
8. Check **Title fees**. If it is wrong or empty, click in the box under it and type the right amount (numbers only, no dollar sign).
9. Check **Sales tax %**. If it is wrong or empty, click in the box under it and type the right number.
10. If you changed either, click the blue **Save** button at the bottom of the left side.
11. Scroll up to the folder **CASE**. If its fields do not show, click the folder's name to open it.
12. Check **Carrier's offer**. If it is wrong or empty, click in the box under it and type the right amount (numbers only, no dollar sign).
13. If you changed it, click the blue **Save** button at the bottom of the left side.
14. Scroll up to the top of folder **CASE**. The Send switches sit at the top of folder **CASE**, right after **Case status**.
15. Click the box under **Send summary** ✕ and pick **Send it now** from the list.
16. Click the blue **Save** button at the bottom of the left side.

Detail: [Step 9: the settlement summary](#)

Move 14 • The fee arrives

If the customer paid the Square invoice, pdrOS sets **Fee paid** to **Square** and texts you: nothing to do. For Venmo, a check, cash or a waived fee:

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it.
5. Click the box under **Fee paid** ✕ and pick **Venmo**, **Check**, **Cash** or **Waived**.
6. Click the blue **Save** button at the bottom of the left side.

Then record the payment on the invoice, or void it if you waived the fee. The clicks are in [Step 10: the fee and the close](#).

Detail: [Step 10: the fee and the close](#)

Between moves: your tasks

1. In the left menu, click **Tasks**. **My Tasks** opens.
2. Click the task's row. A short preview opens under it.
3. Click **Open Full View** and read the task.
4. Click the link under **WHERE**. The customer's contact profile opens in a new browser tab.
5. Do the step the task names (often one of the moves above).
6. Click the browser tab with the Tasks page.
7. Click the green **Mark Complete** button at the bottom right of the full view.

If the task is already gone when you come back, pdrOS closed it because the step happened.

That is the whole job. Every other case type is this list with two or three lines different: [Diminished value](#), [Short pay](#), [Post-repair inspection](#).

The four kinds of case

Answers: what kinds of cases does pdrOS run? what does each one cost the customer? which is which?

Every case in pdrOS is one of four types. The type is picked on the signup form. On the customer's contact profile it shows as **RO Type**, in folder **REPAIR STATUS**. It decides what the customer is asked for, which agreement they sign and which path the case takes.

Type	In one sentence	Fee
total loss claim	The insurer declared the car a total loss and offered too little; you dispute the value under the appraisal clause. The claim is with the customer's own insurer, so Claim side (folder CASE) is Insured .	\$600 at signing, refunded if the final value is not at least \$700 over the offer
diminished value	The car was repaired and is worth less; you demand the loss from the at-fault driver's insurer. The claim is with the other driver's insurer, so Claim side is Claimant .	\$600 at signing (you can type a different fee in Fee amount , folder CASE , before they sign)
short pay	A body shop was underpaid by the insurer; you rewrite the estimate and take it up with the insurer for the owner. The shop usually pays.	\$600, invoiced to the shop or the owner
post-repair inspection	You inspect a repaired car and write a report; the customer then decides: report only, or take it on against the shop or the carrier.	\$600 at signing, plus \$600 travel if you go to them

What each type asks the customer for first

- **Total loss:** the insurer's valuation report. A file in any of the four document fields in folder **CASE** counts (**Carrier valuation report**, **Repair invoice**, **Shop estimate PDF**, **Carrier estimate PDF**).
- **Diminished value:** the repair invoice, the mileage and photos of the car (photos go straight from their phone).
- **Short pay:** nothing from the owner. The shop gets an email with an upload link for its estimate and the carrier's estimate.
- **Post-repair inspection:** a booking through their booking link (the appointment lands on their own contact profile), or, for a travel inspection, a call from you.

The agreement

Each type has its own agreement wording. The customer signs on their phone from the link pdrOS texts them. The agreement names the vehicle, so the signing page asks for the VIN and the year, make and model.

The full journey of a total loss is in Part 4, starting with [The stages](#). The other three types are covered by what differs: [Diminished value](#), [Short pay](#), [Post-repair inspection](#).

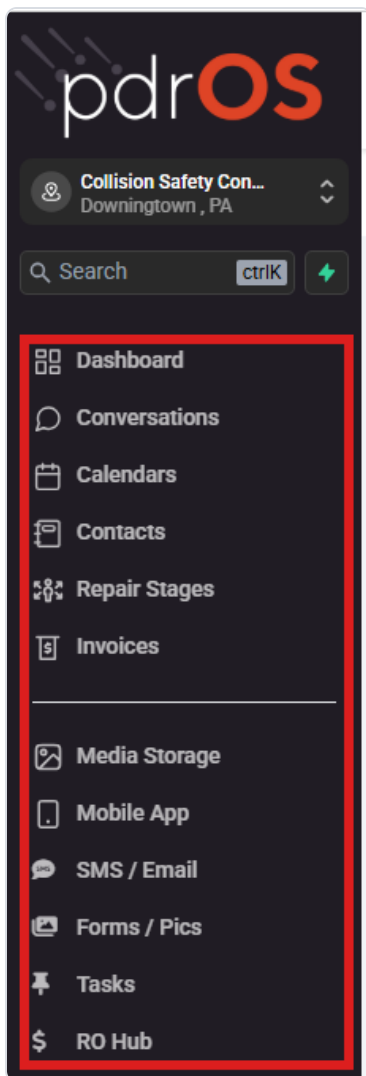
Where things live

Answers: what is on the screen? what is each item in the left menu for? what are the three parts of a contact profile? where is the Save button? how do I read the arrows in tables? can I use it on my phone?

pdrOS opens in your web browser at **app.bc3d.agency**; you sign in with your email and password. It is one screen with a menu down the left. You use up to nine items in that menu. Two of them most of the day, the rest now and then. Almost everything you do for a case happens on one customer's screen, the contact profile.

The left menu

The left menu is the dark menu down the left edge of every screen. Click an item to open its page.



Picture: The left menu, every item circled. Support sits at the bottom, under RO Hub.

Every day

- **Tasks:** your to-do list across every case. Each task gives the facts, the steps and a link to the customer's contact profile. When a task is done, you click its green **Mark Complete** button here.
- **Contacts:** every customer. Search one and click their name to open their contact profile (below). Along the top of the list are saved lists. **Money out** shows every hired case whose **Fee paid** is still **No**.

Several times a week

- **Conversations:** every text and email in one inbox. Customers, and separately the adjusters, appraisers and shops pdrOS emailed for you (each of those under their own name). When your phone says someone "replied by email about one of your cases", you read it here.
- **Calendars:** your inspections at a glance. Look here, never book here. You book, move and cancel from the customer's contact profile (the **Appointments** icon on the right edge).
- **Repair Stages:** the case board. At the top left, pick the pipeline **APPRAISAL CASES**. Each open case is a card in the column of its stage, 1.1 to 6.3. Look only: never drag a card; pdrOS moves them.

When money or paper comes up

- **Invoices:** every fee invoice pdrOS sent through Square, with its status (for example **Due In 1 Day(S), Overdue, Paid, Void**). Recording a check or Venmo payment, voiding (only when you waive a fee), refunds, and the pay link if a customer lost it.
- **RO Hub:** two tabs across the top (other tabs may show; you do not need them). **RO List** shows every case in a list. Its search box finds a case by name, RO number, VIN, claim number, vehicle, phone, email or insurer. Double-click a row: RO Hub opens in a new browser tab with that case loaded. There, the **Contacts** button opens the customer's contact profile and **Docs** opens the documents. **Repair Order** shows one case: type the RO number (your case number) in the box under **RO #:** (it reads Enter repair order number) and click **Search**. Then click the small **Docs** button, to the right of the **Contacts** button: a window lists the case's main PDFs ([Documents](#)).
- **Forms / Pics:** another way to the same PDFs as Docs (the signed agreement, the signup sheet, the photo report), by RO number. You rarely need it ([Documents](#)).

When you need us

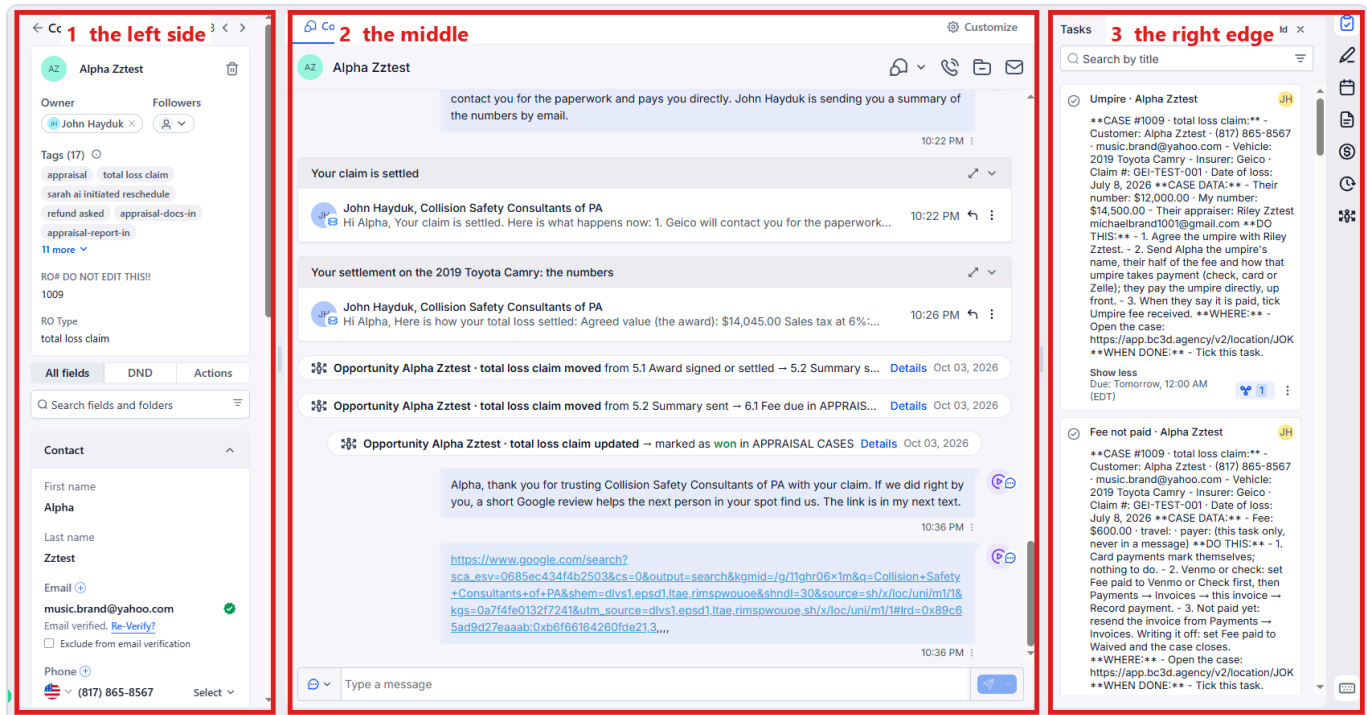
- **Support:** the support chat and, under it, the orange **Support Ticket** button for a person, then this guide, with a **Search** box at the top ([Getting help](#)).

Items you can skip: **Dashboard**, **Mobile App** (only to install the phone app once) and **SMS / Email**. Dashboard is the top item; it shows nothing you need. **Media Storage** holds pictures and files you upload for your own use; nothing in it starts work. Settings are ours; you will not see them.

The contact profile: one customer's screen

To open one:

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.



Picture: The whole contact profile: 1 the left side (folders and fields), 2 the middle (texts and emails), 3 the right edge (Notes, Tasks, Appointments, Documents).

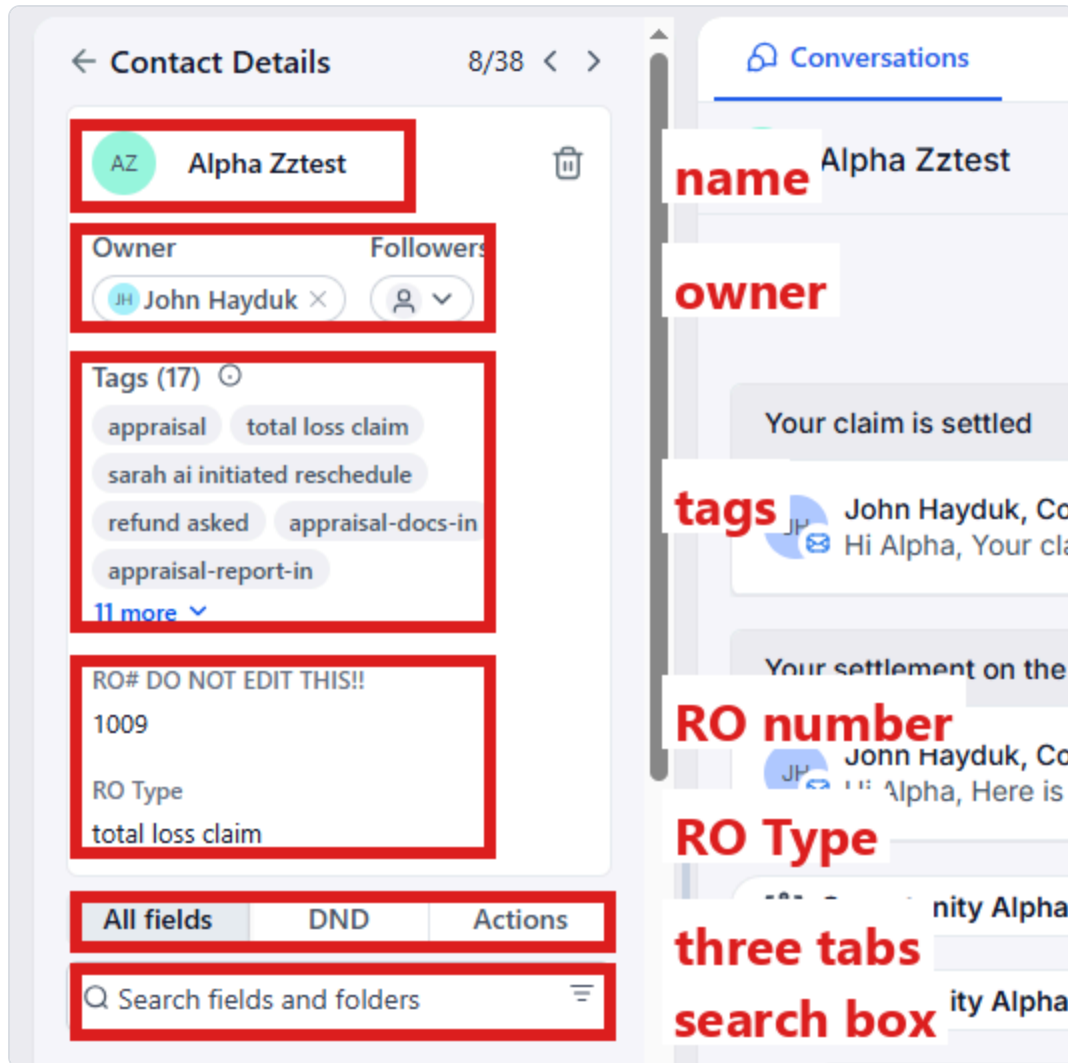
The contact profile has three parts: the left side, the middle and the right edge.

1. The left side: the customer and the folders

From the top down:

- The customer's name, with **Owner** and **Followers** under it.
- **Tags**, under the name. Small labels pdrOS puts on the contact profile as the case moves (for example appraisal-hired). You can look at them; you cannot add or remove them. A tag starts or stops work, so we manage them for you.
- The RO number (**RO# DO NOT EDIT THIS!!**) and **RO Type**, then three tabs (**All fields**, **DND**, **Actions**; stay on **All fields**) and the **Search fields and folders** box.

- The folders. A folder is a box of fields with its name at the top. Click a folder's name to open it; click it again to close it. If you can see its fields under the name, it is already open.



Picture: The top of the left side: the customer's name, Owner, Tags, RO# DO NOT EDIT THIS!! and RO Type, the three tabs (All fields, DND, Actions) and the Search fields and folders box, each labeled.

You have 15 folders, top to bottom:

1. **Contact:** the RO number (**RO# DO NOT EDIT THIS!!**; pdrOS sets it, never change it), the vehicle (**Customer Vehicle / Customer Signup Form**), **Customer Signup Notes**, and the customer's phone and email.
2. **CASE:** the case itself. At the very top, **Case status** (one sentence pdrOS writes), then the five Send switches (**Send range**, **Send demand**, **Send our report**, **Send counter**, **Send summary**). Below them: Claim side, the fee, the range, the documents the customer sends and your RTA.
3. **CARRIER & APPRAISER:** the adjuster, the other appraiser, your number and theirs, the counter, the umpire, the deadlines, the customer's upload link.
4. **OUTCOME:** the award, the settlement figures, the release, and **Outcome**.

5. **SHORT PAY & INSPECTION:** the estimate totals, the inspection location and travel fee, and **Engaged against**.
6. **Estimates:** **Upload Estimate Doc Here** ✂ (your report or rewrite).
7. **Supplements:** **Supplement #1 Upload Doc Here** ✂ (their report).
8. **Insurance Info:** **Insurance Company, Deductible, Claim #**.
9. **FORM | Repair Authorization:** **Repair Authorization Form PDF** (the signed agreement), **VIN, Date of Loss**.
10. **REPAIR STATUS:** **RO Type**, the kind of case.
11. **FORM LINKS:** **REPAIR AUTHORIZATION LINK**, the customer's agreement link.
12. **General Info:** the customer's mailing address. You rarely need it.
13. **Pics To Email PDF:** **Damage Images PDF**, the photo report as a PDF.
14. **Pics To Email HTML:** **Damage Images HTML**, the photo report as a web page.
15. **FORM | Customer Signup:** **Customer Signup Form PDF**.

Your own four come right after **Contact:** **CASE, CARRIER & APPRAISER, OUTCOME** and **SHORT PAY & INSPECTION**. The rest sit below them. Every field, folder by folder, is in [Every field](#).

2. The middle: the conversation

Every text, email and note with this customer, oldest at the top, newest at the bottom. It includes what pdrOS and Sarah sent for you.

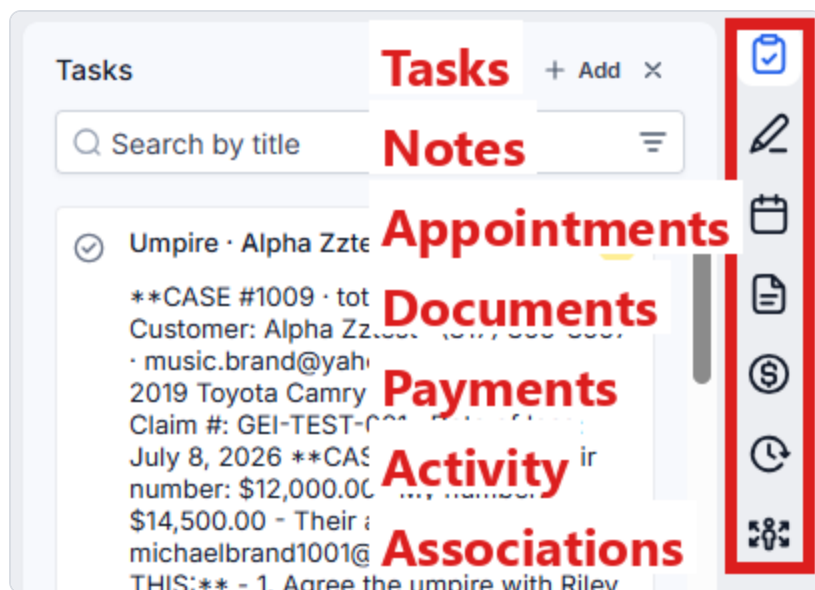
At the very bottom is the message box, where you write a text or an email yourself. At its left end, a small button with a down arrow picks **SMS** (a text) or **Email**. The paper-plane button at its right end sends.

3. The right edge: the icons

A narrow column of small icons runs down the far right edge. Hold the mouse over an icon to see its name. Click it and its panel opens beside it. Top to bottom:

- **Tasks** (a clipboard with a check mark): this customer's tasks. Add one, change its date, or give it to Sharon.
- **Notes** (a pen): the case's timeline. Every note pdrOS wrote, newest at the top.
- **Appointments** (a calendar): book, move or cancel an inspection, or mark a no show. The only place to book.
- **Documents** (a page): every file on this customer, with its date.
- **Payments** (a dollar sign): this customer's invoices and payments.
- **Activity** (a clock): a list of what happened on this contact profile. You rarely need it.

You may see one or two more icons. You do not need them.



Picture: The right edge of the contact profile: the column of icons, each labeled (Tasks, Notes, Appointments, Documents, Payments, Activity, Associations).

On your phone

The phone app (it is called LeadConnector in the App Store and Google Play; sign in with the same email and password) shows **Conversations**, **Contacts**, **Calendars** and your tasks. Alerts come to your phone as plain texts either way, and the Tasks page is easiest on the computer.

The blue Save button

When you change a field, a bar appears at the bottom of the left side: "1 change made", a **Cancel** button and a blue **Save** button. Click **Save** after every change. Nothing happens and nothing is sent until you click it; **Cancel** throws the change away.

If you change a field and no blue **Save** button appears, stop and tell us: Auto-Save has been switched on. Never click **Enable auto-save** (under the three dots next to the blue Save button).

Reading the arrows in tables

Tables in this guide shorten a route with arrows. Arrows mean: click this, then this.

For example, **Contacts** → the customer → folder **CASE** → **Send demand** means:

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list.

4. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it.
5. Find **Send demand**.

Two more you will meet:

- **Contacts** → the customer → right edge **Notes**: open the customer's contact profile, then click the **Notes** icon on the far right edge.
- **Tasks** → the task → **Open Full View**: in the left menu, click **Tasks**, click the task's row, then click **Open Full View**.

Words we use

Answers: what does this word mean? what is it called on screen? where is it on the screen?

One word per thing, everywhere in pdrOS and in this guide.

Where a word is a place on the screen, its route follows with arrows. Arrows mean: click this, then this. For example, "**Contacts** → the customer" means three moves. In the left menu, click **Contacts**. Click in the search box at the top of the list and type the customer's last name or RO number (your case number). Click the customer's name in the list.

The screen

Contact profile: one customer's screen. **Contacts** → the customer. It has three parts. The left side holds the customer's name, then **Tags**, the RO number and **RO Type**, then the folders of fields. The middle holds every text, email and note with this customer, with the message box at the bottom. The right edge is a narrow column of small icons. The map of it is in [Where things live](#).

The left side: the left part of the contact profile, with the customer's name at the top and the folders under it.

The middle: the middle part of the contact profile, the customer's thread.

The right edge: the narrow column of small icons down the far right of the contact profile: **Tasks, Notes, Appointments, Documents, Payments, Activity**. Hold the mouse over an icon to see its name; click it to open its panel beside it.

Folder: a box of fields on the left side of the contact profile, with its name at the top. Click the folder's name to open it. You have 15, top to bottom: **Contact, CASE, CARRIER & APPRAISER, OUTCOME, SHORT PAY & INSPECTION, Estimates, Supplements, Insurance Info, FORM | Repair Authorization, REPAIR STATUS, FORM LINKS, General Info, Pics To Email PDF, Pics To Email HTML, FORM | Customer Signup**. Your own four come right after **Contact**.

Field: one box in a folder, with its name above it. Each kind takes its own action: - a list: click the box and pick a choice; - Claim side and Fee payer: a list too; click the box and pick; - a box with one choice (for example **Umpire fee received**): click it and pick **Received**; - a date: click the box and pick the day in the calendar that opens; - money, a number or text: click in the box and type (money as numbers only, no dollar sign); - a file: click **Click to upload**, pick the PDF on your computer and click **Open**; - a PDF address (for example **Repair Authorization Form PDF**): a text box holding the PDF's web address, not a clickable link. Open the PDF with the **Docs** button in RO Hub ([Documents](#)).

A field marked ✂ starts work when you change it and click the blue **Save** button at the bottom of the left side.

Tags: small labels pdrOS puts on the contact profile as the case moves (for example appraisal-hired). They sit at the top of the left side, under the customer's name. You can look at them; you cannot add or remove them. A tag starts or stops work, so we manage them for you.

Save: the blue **Save** button at the bottom of the left side. It appears as soon as you change a field. Nothing happens and nothing is sent until you click it. The blue Save button is for fields. Notes, tasks and appointments have their own **Save** button in their panel.

The customer's thread: the middle of the contact profile, every text and email with that customer. **Conversations** is the page in the left menu that lists every thread.

Tasks page: the page that opens when you click **Tasks** in the left menu. **My Tasks** lists your tasks across every case.

Mark Complete: the green button at the bottom right of a task's full view. **Tasks** → the task → **Open Full View** → **Mark Complete**. When a task says "Tick this task", it means: click **Mark Complete**. If the task is already gone when you come back, pdrOS closed it because the step happened.

The case board (left menu **Repair Stages**, pipeline **APPRAISAL CASES**): every open case as a card in its stage. Look, do not drag.

The case

Case: one customer's one claim: a total loss, a diminished value, a short pay or a post-repair inspection. Each case has its own contact profile. A customer with two claims has two contact profiles. You never click a case; you open the customer's contact profile.

RO number (your case number): the number pdrOS gives every case at signup (for example 1009). On screen the field is **RO# DO NOT EDIT THIS!!**, in folder **Contact: Contacts** → the customer → folder **Contact** → **RO# DO NOT EDIT THIS!!**. pdrOS sets it; never change it. It is one number, written four ways: - **RO#** on the contact profile; - **CASE #1009** in your tasks; - **case #1009** in the texts to your phone; - **file #1009** in everything the customer gets.

RO Type (on the signup form it is called **Repair Order Type**): the kind of case. It is a list in folder **REPAIR STATUS** with twelve choices. Yours are **total loss claim**, **diminished value**, **short pay** and **post-repair inspection**.

Claim side: a list with two choices, **Insured** and **Claimant**, in folder **CASE**. Insured when the customer's own insurer pays, Claimant when the other driver's insurer pays.

Send switch: one of five lists at the top of folder **CASE: Send range**, **Send demand**, **Send our report**, **Send counter** and **Send summary**. **Contacts** → the customer → folder **CASE** → the Send switch. You pick **Send it now** or **I sent it myself**; pdrOS then changes it to **Sent** or **Not sent (see task)**.

Task: a to-do pdrOS gives you or Sharon, with the facts and the steps. **Tasks** → the task → **Open Full View**. When you have done the step, click **Mark Complete**.

Note: a line pdrOS writes on the contact profile every time it does something, with the time. Notes are the case's timeline. **Contacts** → the customer → right edge **Notes**.

Alert: a text to John's phone about something time-sensitive. A few go to **the office phone** instead: Sharon's cell, which we set on day one.

The other side: the adjuster, their appraiser, or the body shop, on a case.

The adjuster: the insurer's claims person who receives the RTA or the demand. On screen: **Adjuster name** and **Adjuster email**, in folder **CARRIER & APPRAISER**.

Their appraiser: the appraiser the insurer appoints. On screen the fields are **Other appraiser name**, **Other appraiser email** and **Other appraiser phone**, in folder **CARRIER & APPRAISER**.

The other side's contact: the contact profile pdrOS makes for an adjuster, their appraiser or a shop the first time it emails them. Their emails and replies live there, under their own name in **Conversations**, not in the customer's thread.

Clock A: the seven to ten business days the insurer's appraiser has to make contact after the RTA goes.

Clock B: the wait for their appraiser's report after yours goes: two chase emails, then a text and a task on day 22.

Chase: a reminder pdrOS sends on a schedule. To the customer for documents or a signature; to the shop for estimates; to the other side for a reply or a report.

RTA: the right-to-appraisal demand, the letter that names you as the customer's appraiser. You make it in RTAflow and upload the PDF to **RTA or demand PDF**, in folder **CASE**.

Umpire: the third appraiser who decides when the two appraisers cannot agree. On screen: **Umpire**, a list in folder **CARRIER & APPRAISER (No, Called, Decided)**.

Award: the agreed or decided amount of loss, with its signed date. On screen: **Award amount** and **Award signed date**, in folder **OUTCOME**.

Settlement summary: the email pdrOS sends the customer at the end. It shows the award, the sales tax, the title fees, the deductible, the net to them and how much more than the first offer.

Fee paid: the list in folder **CASE** that records how the fee was paid: **No, Square, Venmo, Check, Cash** or **Waived**. A hired case closes when it has a final **Outcome** and **Fee paid** is not **No**; a case the customer never signed closes on any final Outcome.

Outcome: the list in folder **OUTCOME** that says how the case ended: **Settled, Report only, Withdrawn, Customer took the carrier's number, Went quiet, Court, Counteroffer pending, Carrier review report received.**

Stage: where the case is, 1.1 to 6.3. Each stage has one plain sentence in **Case status** (folder **CASE**), the one Sarah says if the customer asks.

Sarah: the texting assistant on the 610 number. She answers customers from what is on their contact profile. Fee questions and requests to move an inspection go to Sharon as tasks; figures, offers and decisions come to you.

The agreement: on screen it is the **Repair Authorization Form**. Its signed PDF is **Repair Authorization Form PDF**, in folder **FORM | Repair Authorization**. Its link is **REPAIR AUTHORIZATION LINK**, in folder **FORM LINKS**.

The upload link: on screen **Appraisal Document Upload Link**, in folder **CARRIER & APPRAISER**. It is the customer's own page for sending files and photos; everything sent through it lands on their contact profile.

Sign: the customer signing the agreement on their phone from the link pdrOS texts them.

Other words for this:

- RO number = RO#, CASE #, case #, file #, case number.
- contact profile = the contact, the customer's details.
- Mark Complete = "Tick this task".
- Send switch = the dropdown, the list.
- RTA = right to appraisal, demand for appraisal.
- the other side = the carrier, the insurer, their appraiser, the adjuster.
- the agreement = the Repair Authorization Form.
- tortfeasor letter = pre-court letter.
- CCC1 = the estimating system.
- the case board = the pipeline, Repair Stages.

The Send switches

Answers: where are the Send switches? how do I send the range, the demand, my report, a counter, the summary? what does Not sent (see task) mean? what if a switch did not go? how do I resend?

The five Send switches are how your range, your demand, your report, your counters and the settlement summary leave your office. None of those goes out until you set its switch. Setting a switch means picking **Send it now** in it and clicking the blue **Save** button.

The switches sit near the top of the folder **CASE**, on the left side of the contact profile, right after its first field, **Case status**. From the top down they are **Send range**, **Send demand**, **Send our report**, **Send counter** and **Send summary**: the order a case uses them.

The five

Switch 	What it sends	To whom
Send range	Your valuation range and the agreement link (text + email)	The customer
Send demand	The RTA (insured) or the demand pack (claimant)	The adjuster
Send our report	Your report (on a short pay, the rewrite), plus the repair invoice, the two estimates and the photo report when the case has them	The other appraiser (insured) or the adjuster (claimant)
Send counter	Your counteroffer with your one-line note	The other appraiser (insured) or the adjuster (claimant)
Send summary	The settlement summary with the numbers	The customer

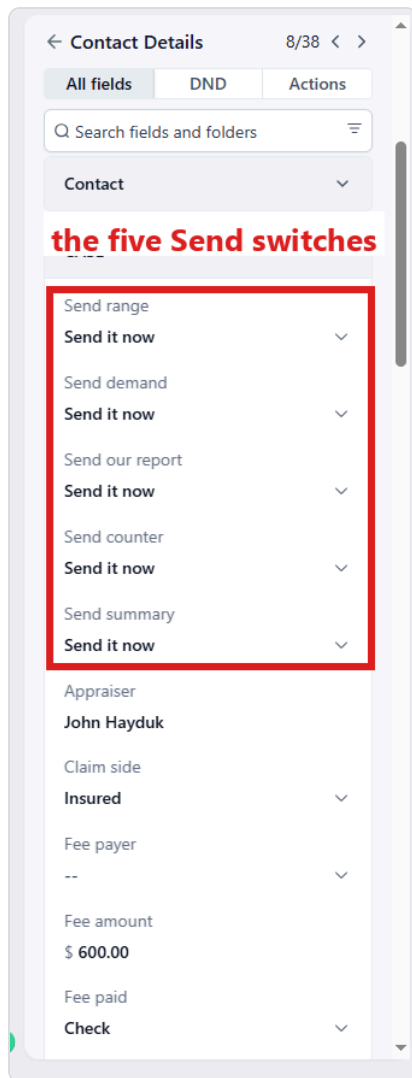
Set a switch, step by step

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number (your case number).
3. Click the customer's name in the list. Their contact profile opens.

You are in the right place when you see the customer's name at the top left and their texts in the middle. 4. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it. 5. Look at the top of folder **CASE**. The Send switches sit at the top, right after **Case status**. 6. Click the box under the switch you want, for example **Send demand**. 7. Pick **Send it now** from the list. 8. Click the blue **Save** button at the bottom of the left side. Nothing is sent until you click it.

Or, from a task. In the left menu, click **Tasks**. Click the task's row, then **Open Full View**. Click the link under **WHERE** (after the words "Open the case"). The contact profile opens in a new browser tab. Then go on from step 4.

If no blue **Save** button appears after step 7, the switch has already gone: Auto-Save has been switched on. Stop and tell us.



Picture: Folder CASE open: the five Send switches at the top circled.

The two things you can set

- **Send it now:** pdrOS writes the email as you and attaches the right PDFs. It sends it, writes the date in its field and adds a note saying what went.
- **I sent it myself:** you already sent it by hand. pdrOS writes the date, moves the case and starts the clocks, but sends nothing.

The two things pdrOS sets back

- **Sent:** it went. The newest note says to whom, with what attached. To read it, click the **Notes** icon on the far right edge of the contact profile (it looks like a pen).
- **Not sent (see task):** something was missing. A task names exactly what. Fix it, then set the switch again (the retry rule below).

You pick those two values yourself only when a task or this guide tells you to (the swallowed-switch fix below, and the rare "record it by hand" task).

What each switch needs first, and the task you get if it is missing

Arrows mean: click this, then this. Each route starts at **Contacts** → the customer (search their name, click it), then opens each folder in turn.

Switch	Needs first, and where it is	If something is missing	That task
Send range	A total loss or diminished value case. Contacts → the customer → folder CASE → Range low and Range high . Fill Carrier's offer too (same folder): it prints in the email.	Task A Send switch could not act	You click Mark Complete
Send demand	Contacts → the customer → folder CASE → RTA or demand PDF ; folder CASE → Agreement signed date filled (the customer must have signed; if it is empty, send them their agreement link again); folder FORM Repair Authorization → Date of Loss ; folder Insurance Info → Claim # ; folder CARRIER & APPRAISER → a valid Adjuster email	Task △ Demand not sent , naming each missing item	Closes itself when the demand goes
Send our report	Contacts → the customer → folder Estimates → your report in Upload Estimate Doc Here ; folder CARRIER & APPRAISER → Other appraiser email (on a claimant case, Adjuster email); folder Insurance Info → Claim #	Task △ Our report not sent	Closes itself when the report goes
Send counter	Contacts → the customer → folder CARRIER & APPRAISER → Counteroffer, Their number, My number (the Negotiation note , same folder, is optional); folder Insurance Info → Claim #	Task △ Counteroffer not sent	Closes itself when the counter goes
Send summary	A total loss or diminished value case. Contacts → the customer → folder OUTCOME → Award amount ; folder CASE → Carrier's offer . On a total loss also folder OUTCOME → Title fees and Sales tax % , and folder Insurance Info → Deductible .	Task A Send switch could not act	You click Mark Complete

Switch	Needs first, and where it is	If something is missing	That task
Any switch left on Send it now for five minutes	(nothing went)	Task A Send switch did not go and a text to your phone	You click Mark Complete

To mark a task complete: in the left menu, click **Tasks**. Click the task's row, click **Open Full View**, then click the green **Mark Complete** button at the bottom right. If the task is already gone when you come back, pdrOS closed it because the step happened.

The retry rule

If a switch comes back **Not sent (see task)**:

1. In the left menu, click **Tasks**.
2. Click the task's row, then click **Open Full View**. Under **WHY IT DID NOT GO** and **FIX IT** (on the task **A Send switch could not act**, under **DO THIS**), the task names what is missing.
3. Under **WHERE**, click the link. The customer's contact profile opens in a new browser tab.

You are in the right place when you see the customer's name at the top left and their texts in the middle. 4. On the left side of the contact profile, scroll down to the folder that holds the missing field and click the folder's name. (The table above says which folder.) 5. Fill the missing field: type it, or upload the file. 6. Click the blue **Save** button at the bottom of the left side. 7. **Wait one minute**. 8. Scroll up to the folder **CASE**. If its fields do not show, click the folder's name to open it. The Send switches sit at its top, right after **Case status**. 9. Click the box under the switch. 10. Pick **Send it now**. 11. Click the blue **Save** button at the bottom of the left side.

The three  tasks close themselves when the email goes. For **A Send switch could not act**, click the browser tab with the Tasks page. Then click the green **Mark Complete** button at the bottom right of the full view.

When a switch is swallowed

If you set the switch again within seconds of a refusal, the second try can be swallowed. pdrOS watches for that. If a switch still reads **Send it now** five minutes after you set it, you get a text ("still says Send it now after five minutes. It did not go"). A task comes with it. Then:

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.

3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it.
5. Look at the top of the folder. Find the switch that still reads **Send it now**.
6. Click the box under that switch.
7. Pick **Not sent (see task)**. Do not pick **I sent it myself** unless you really did send the email by hand: it records the email as sent by you.
8. Click the blue **Save** button at the bottom of the left side.
9. Wait one minute.
10. Click the box under the same switch again.
11. Pick **Send it now**.
12. Click the blue **Save** button at the bottom of the left side.
13. Still reading **Send it now** five minutes later? Send the email yourself, pick **I sent it myself**, click the blue **Save** button, and tell us (in the left menu, click **Support**, then the orange **Support Ticket** button).

Then, in the left menu, click **Tasks**. Open **A Send switch did not go** (click its row, then **Open Full View**) and click the green **Mark Complete** button.

The three guards

The same demand, report or counter twice within ten minutes: skipped, with a note saying so. If you really want a second copy, wait ten minutes. Then:

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list.
4. On the left side, scroll down to the folder **CASE** and click the folder's name to open it.
5. Click the box under the switch and pick **Send it now**.
6. Click the blue **Save** button at the bottom of the left side.

A demand that already went: refused, with the date it went. To send a corrected demand:

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.

4. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it.
5. Find **RTA or demand sent date**. Click in the box. If a small x shows at its right end, click it; otherwise select the date and press the Delete key until the box is empty.
6. Scroll up to the folder **CASE** (just above **CARRIER & APPRAISER**). If its fields do not show, click the folder's name to open it.
7. If the demand itself changed, remove the old file from **RTA or demand PDF**: click the trash can icon to the right of the file's name. Every file left there goes with the email.
8. In **RTA or demand PDF**, click **Click to upload**, pick the corrected PDF on your computer and click **Open**.
9. Click the blue **Save** button at the bottom of the left side.
10. Wait one minute.
11. Scroll up to the top of folder **CASE**. The Send switches sit at the top of folder **CASE**, right after **Case status**.
12. Click the box under **Send demand** and pick **Send it now**.
13. Click the blue **Save** button at the bottom of the left side.

A corrected range or counter: change the number and set the switch again. A corrected range goes out the moment you set **Send range** again. A corrected counter goes through at once; the same counter within ten minutes does not.

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list.
4. On the left side, scroll down to the folder **CASE** (range) or **CARRIER & APPRAISER** (counter) and click the folder's name to open it.
5. Click in the box under **Range low** and **Range high**, or under **Counteroffer**, and type the new number (numbers only, no dollar sign).
6. Click the blue **Save** button at the bottom of the left side.
7. Scroll up to the top of folder **CASE** (click its name if its fields do not show).
8. Click the box under **Send range** or **Send counter** and pick **Send it now**.
9. Click the blue **Save** button at the bottom of the left side.

On a closed case

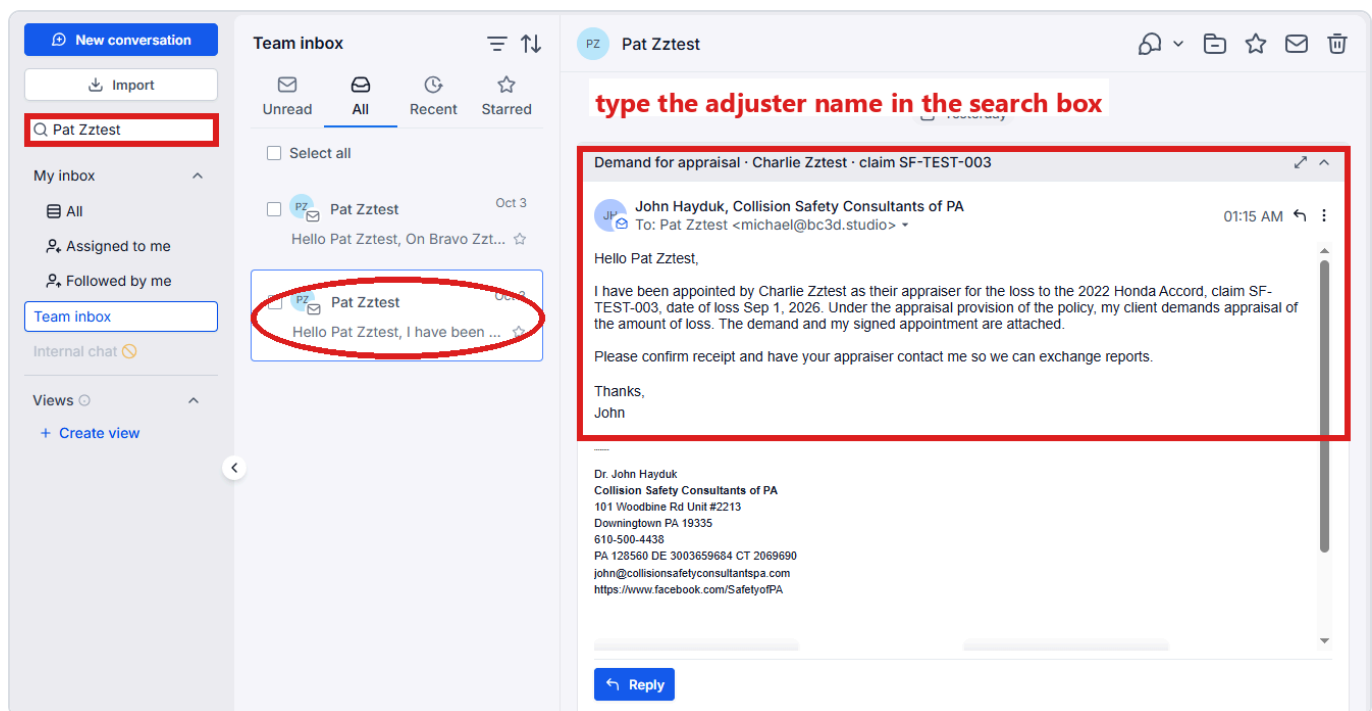
Switches do nothing on a closed case. Five minutes later you get the "It did not go" text so you know it was ignored.

After a send

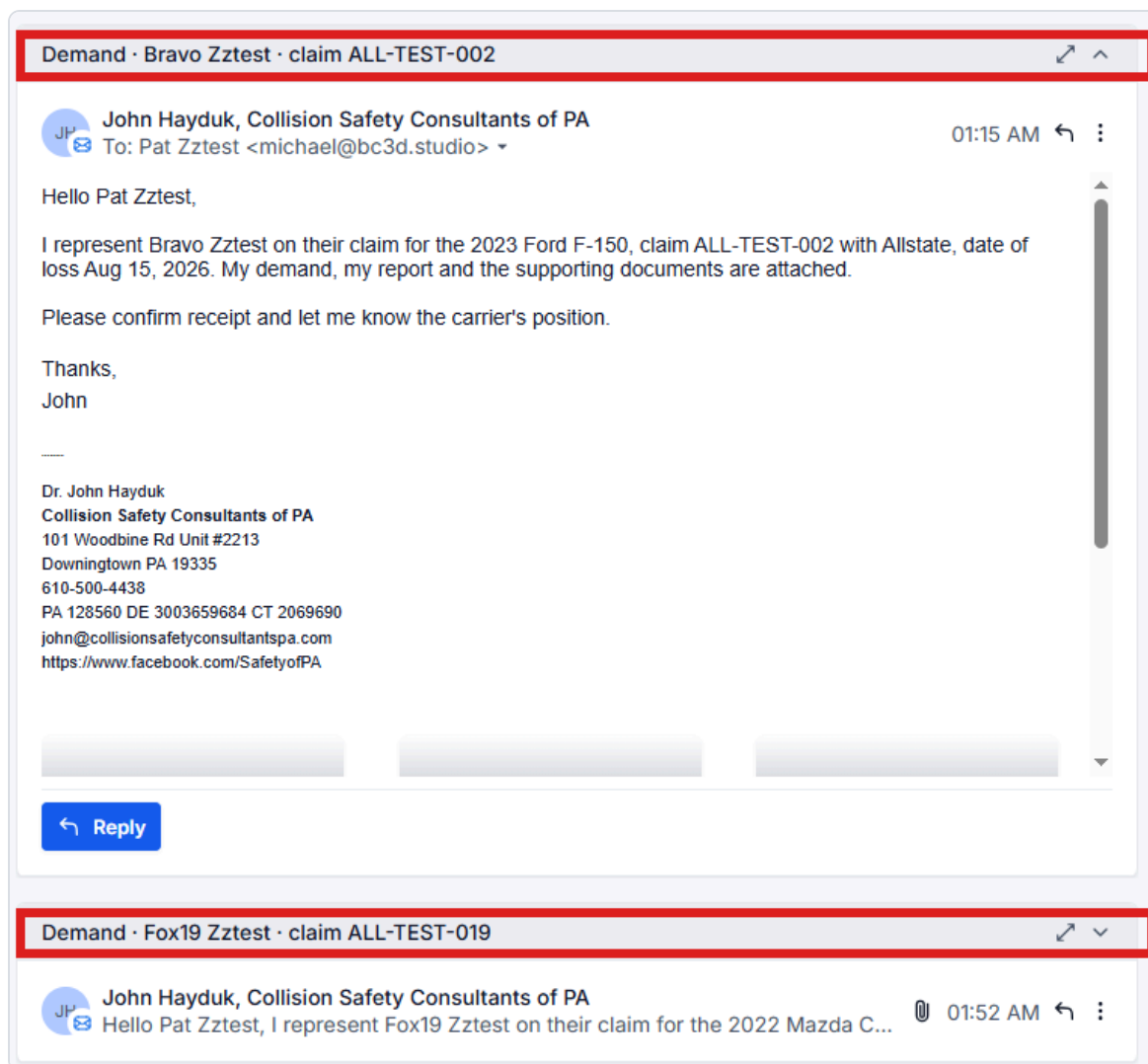
The email that went is in the adjuster's or the other appraiser's own conversation, under their name, not in the customer's thread. That is the copy of record, and their reply will land there. To read it:

1. In the left menu, click **Conversations**.
2. Click in the search box at the top left (above **My inbox**) and type the adjuster's or the other appraiser's name. Click their name in the list. Their thread opens in the middle.

You are in the right place when their name is at the top of the right column. The email pdrOS sent is in the middle; its subject line names your customer and the claim number. If the same adjuster handles more than one of your cases, all of those emails sit in this one conversation, so read the subject line.



Picture: Conversations: the adjuster's own conversation under their name, the demand email as pdrOS sent it circled.



Picture: The same adjuster on two of your cases: both emails sit in this one conversation, so read the subject lines.

Other words for this: Send switch = the dropdown, the send button; Send it now = send; I sent it myself = record only; RTA = right to appraisal, demand for appraisal; the other side = the carrier, the insurer, the adjuster, their appraiser.

The Tasks page: how a task reads and what to do with it

Answers: how do I open my tasks? how do I read a task? what do I do when a task is done? which tasks close themselves?

A task is pdrOS saying "your turn", with everything you need written in it.

Open the Tasks page

1. In the left menu, click **Tasks**.
2. **My Tasks** opens. You are in the right place when you see four boxes at the top: **Overdue, Due Today, This Week** and **Completed**.
3. Each box shows how many tasks are in it. Click a box to see those tasks.

If you see two tabs, **My Tasks** and **All Tasks (Admin)**, stay on **My Tasks**. **All Tasks (Admin)** shows Sharon's tasks too.

My Tasks
Welcome back, John Hayduk [Admin](#)

[My Tasks](#) [All Tasks \(Admin\)](#)

Overdue **45** Due Today **14** This Week **17** Completed **0**

All Active Tasks (75 tasks) [Refresh](#)

☐ **Documents in · value it · Test Five,** Oct 1
@ John Hayduk

Assigned to: John Hayduk

CASE #1007 · total loss claim:

- Customer: Test Five, · (817) 961-1196 · music.brand@yahoo.com
- Vehicle: 2020 Lexus
- Insurer: Geico · Claim #: · Date of loss:

CASE DATA:

- Their offer: \$10,000.00...

[Open Full View](#) **click a row, then Open Full View**

Picture: The Tasks page: My Tasks, the four boxes Overdue, Due Today, This Week and Completed, and one task's preview with Open Full View circled.

Open one task

1. In the left menu, click **Tasks**.
2. Click the task's row. A short preview opens under it.
3. Click **Open Full View** to read the whole task.

You are in the right place when you see the task's title at the top, then **Related Information** and **Task Details**.

A very short task (for example **User query**) has no **Open Full View** button: its preview already shows everything. Mark it complete with the box at the left of its row.

Send the demand · Kitcheck Zztest

☐
Mark Complete

Oct 2

Related Information

Assigned to: John Hayduk

Task Details

CASE #1008 · total loss claim:

- Customer: Kitcheck Zztest · +55 21 4555-0142 · michael+kitcheck@bc3d.studio
- Vehicle: 2020 Test Car
- Insurer: Geico · Claim #: KIT-0001 · Date of loss: August 20, 2026

CASE DATA:

- Claim side: Insured (Insured = RTA to their own insurer; Claimant = demand to the at-fault insurer)
- Adjuster: ·
- Signed agreement: https://cmnqwtgmcjoajytdnzt.supabase.co/storage/v1/object/public/documents/repair_auth_ORIZATION_form_Kitcheck_Zztest_10-01-2026_gkCguGWFdYS4YucXCuNg.1790891800302_53y0o925i86.pdf
- Your report:

DO THIS:

- 1. Make the RTA (RTAFlow) or your demand letter as a PDF and upload it to RTA or demand PDF (folder CASE), Save.
- 2. Check Adjuster name and email (folder CARRIER & APPRAISER).
- 3. Set Send demand to Send it now (top of folder CASE), Save. pdrOS emails it as you with the right attachments and starts the clock. Sent it yourself already? Choose I sent it myself.

WHERE:

- Open the case: <https://app.bc3d.agency/v2/location/JOKy8MLUjehcuBM4Ejk3/contacts/detail/gkCguGWFdYS4YucXCuNg>

WHEN DONE:

- Tick this task.

Created: 10/1/2026, 6:56:43 PM

Mark Complete, bottom right

Close

☒
Mark Complete

Picture: A task in full view: Related Information, then Task Details with CASE, CASE DATA, DO THIS, WHERE (its link circled) and WHEN DONE, and the green Mark Complete button at the bottom right circled.

How a task reads

Related Information shows who the task is assigned to. **Task Details** holds the task itself. Most tasks pdrOS writes have the same five headings:

- **CASE:** for example "CASE #1009 · total loss claim". That is the RO number (your case number) and the type. Then the customer's name, phone, email, vehicle, insurer, claim number and date of loss.
- **CASE DATA:** the facts this task needs (their offer, the documents received with links, the figures so far).
- **DO THIS:** one to three numbered steps. Which folder, which field, which switch.
- **WHERE:** a link after the words "Open the case". It opens the customer's contact profile in a new browser tab. (Some tasks also have an **Open Contact** button at the bottom of the full view, next to **Close**; it opens the same contact profile.)

- **WHEN DONE:** "Tick this task", which means: click **Mark Complete**. On the three △ tasks it says the task closes itself when the email goes.

The three △ tasks read **WHY IT DID NOT GO, FIX IT, WHERE** and **WHEN DONE** instead.

The tasks Sarah makes for the office read a little differently. These are Sharon's: a money question, a date, new details, a document, an unhappy customer, needs a person. Their headings are:

- **CUSTOMER** (instead of **CASE**);
- **NUMBERS ON FILE** or **WHERE IT STANDS NOW**;
- **WHY YOU HAVE THIS**;
- **DO THIS**;
- **WHERE** (the link follows "Conversation and case");
- **WHEN DONE**.

Do a task, start to finish

1. In the left menu, click **Tasks**.
2. Click the task's row.
3. Click **Open Full View**.
4. Read **DO THIS**.
5. Under **WHERE**, click the link. The customer's contact profile opens in a new browser tab.

You are in the right place when you see the customer's name at the top left and their texts in the middle. 6. Do the steps on the contact profile. After you change a field, click the blue **Save** button at the bottom of the left side. 7. At the very top of the screen, click the browser tab you came from. The Tasks page is still open there. (If the full view has closed, click the task's row and **Open Full View** again.) 8. Click the green **Mark Complete** button at the bottom right of the full view. 9. Click **Close** to go back to the list.

If the task is already gone when you come back, pdrOS closed it because the step happened.

Marking a task complete

Two ways, same result:

- In the full view: click the green **Mark Complete** button at the bottom right, then click **Close**.
- On the list: check the box at the left of the task's row.

Marking a task complete does not start anything. It keeps your list true, so what is left on the page is what is really left to do.

Marked one complete by mistake?

1. In the left menu, click **Tasks**.
2. Click the **Completed** box at the top of **My Tasks**.
3. Find the task and uncheck the box at the left of its row. It is open again.

Tasks that close themselves

Only three tasks are built to close themselves: ⚠ **Demand not sent**, ⚠ **Our report not sent** and ⚠ **Counteroffer not sent**. They close the moment the email finally goes. You do not have to mark them. Every other task stays on your list until you, or Sharon, click **Mark Complete**.

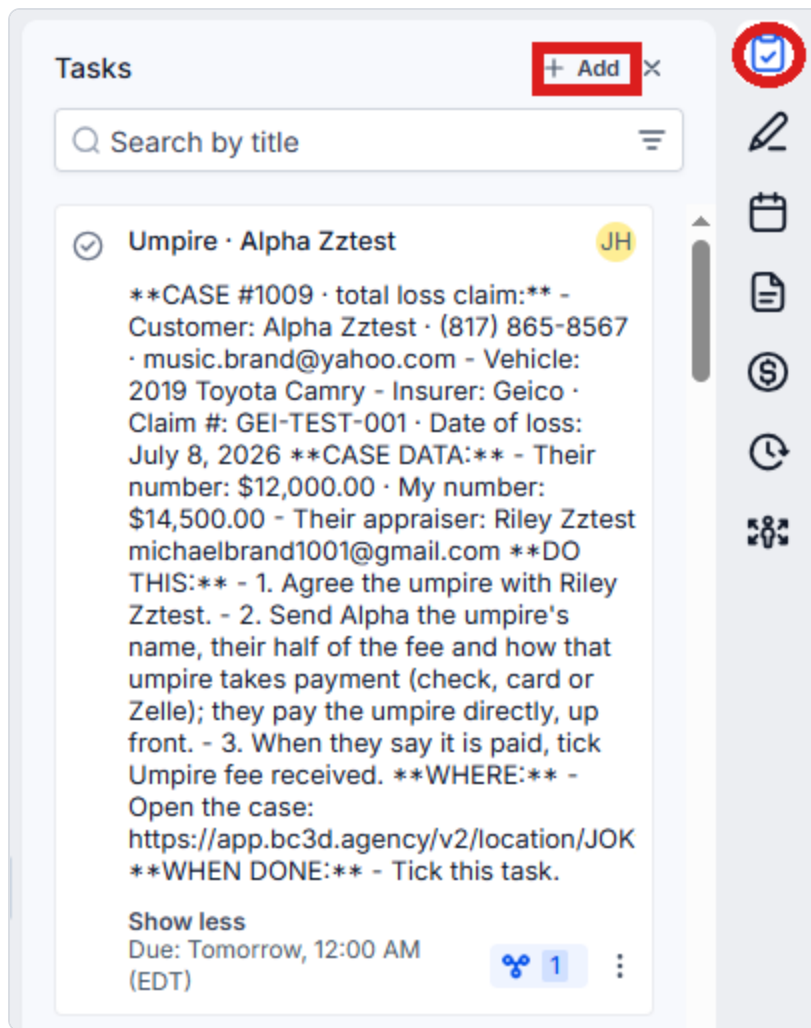
Who gets which tasks

- **John**: everything about a case's value, documents, demands, negotiation, award, fee.
- **Sharon**: entering the shop's estimate in CCC1, and the office follow-ups Sarah creates (money question, wants a date, document request, new details, unhappy customer, handover).

To give a task to the other person:

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens.

You are in the right place when you see the customer's name at the top left and their texts in the middle. 4. On the far right edge of the contact profile, click the **Tasks** icon (a clipboard with a check mark). The customer's tasks open beside it. 5. Click the task's title. 6. Click **Assignee** and pick **Sharon** (or yourself). 7. Click **Save** at the bottom of the task panel.



Picture: The Tasks icon (a clipboard with a check mark) on the right edge circled, the customer's tasks open beside it, + Add circled.

The signup form: how every case starts

Answers: how do I start a new case? how do I fill the signup form? what happens after I press Submit? how do I find the new customer and check what the form saved?

A case starts when the **Appraisal Case Sign-Up Form** is submitted. You fill it with the customer on the phone, or the customer fills it from the link you send. Two minutes later the case exists, the customer has been welcomed and asked for what you need, and Sarah is answering their texts.

The form is a web page of its own, not part of the contact profile. It opens from your signup link, on your phone or your computer.

When you fill it

You have the customer on the phone. This is the normal way for a caller.

1. Open your signup link: click your signup bookmark on your computer, or tap the "Signup" icon on your phone's home screen. (To set these up, see [Your three links](#).) The form opens in your browser. You are in the right place when you see the boxes **First Name**, **Last Name**, **Email** and **Phone** at the top.
2. Fill the boxes as you talk, from the top down. Each box is explained below.
3. Ask "OK to text you updates?" and check the consent box only if they say yes (box 16 below).
4. Click **Submit** at the bottom of the form.

When the customer fills it

Send them the plain signup link by text or email, and they fill it on their phone. They have no contact profile yet, so send it from your own phone or email. Copy the link from your bookmark, or from [Your three links](#).

A customer referred by a shop already has their own link. Use that one, never the plain link, so the signup lands on their own contact profile. It is in the email pdrOS sent them. It is also in your task **Call the referred customer**: in the left menu, click **Tasks**, click the task's row, then click **Open Full View**. The full steps are in [Shop referrals](#).

Appraisal Case Sign Up Form

name, email, phone, type, vehicle

First Name * 	Last Name *
Email * 	Phone *
Repair Order Type * 	Customer Vehicle *

Insurance Company * 	Claim #
Date of Loss 	

Customer Signup Notes

These notes will be included in the new customer signup SMS notifications sent to office staff

Submit

Picture: The signup form: First Name, Last Name, Email, Phone, Repair Order Type, Customer Vehicle.

The fields, in order

The form starts short: the names, the type, the vehicle, the insurer and claim number, **Date of Loss**, the notes box and **Submit**. The moment you pick the **Repair Order Type**, the boxes that case type needs appear under it. A total loss shows the claim side, the carrier's offer and the other appraiser's details. A short pay shows the two estimate totals. An inspection shows the inspection location. A box you never see on a given type is not needed for it.

1. **First Name, Last Name, Email, Phone** (required). Type the phone with the area code.
2. **Repair Order Type** (required): total loss claim, diminished value, short pay or post-repair inspection. The list also shows hail, collision and other body-shop jobs from another part of pdrOS. Pick only the four appraisal types. (On the contact profile this answer is called **RO Type**.)
3. **Customer Vehicle** (required): year, make, model.
4. **Insurance Company** (required) and **Claim #** if they have it.

5. **Date of Loss:** the accident date. On a diminished value case, and on an inspection with Claim side Claimant, pdrOS turns it into the statute deadline and texts the customer the date.

after picking the type, these appear

First Name

Last Name

Email *

Phone *

Repair Order Type *

Customer Vehicle *

Insurance Company *

Claim #

Claim side * ☐ Insured ☐ Claimant

Date of Loss

Referring shop

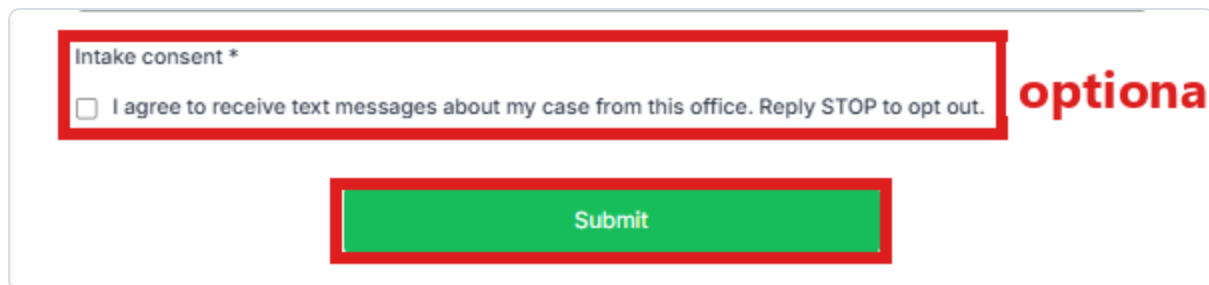
How they found us

Picture: The signup form after picking total loss claim: Claim side (Insured / Claimant) and Date of Loss.

These appear once the type is picked, each only on the types that need it (the notes box at the end is always there):

1. **Claim side** (required), the two round buttons **Insured** and **Claimant**: Insured when it is the customer's own insurer (every total loss); Claimant when the other driver's insurer pays (diminished value). On a post-repair inspection: Insured when their own insurer paid for the repair, Claimant when the other driver's insurer paid. On a post-repair inspection, if you later go after the other driver's insurer, pdrOS changes this to **Claimant** for you.
2. **Referring shop** (with the shop's contact and email boxes): the shop that sent the customer, if any. On a short pay the shop gets the upload email.
3. **How they found us**.
4. **Carrier's offer**: the insurer's number so far.

5. **Other appraiser name, Other appraiser email, Other appraiser phone** if known (they can be typed later; the adjuster's details are typed on the contact profile, see [Step 4: the RTA](#)).
6. **Demand-by date** if there is one.
7. **Shop estimate total, Carrier estimate total**: short pay.
8. **Owner** or **Shop**: who pays the fee.
9. **Inspection location**: Our office or Travel (post-repair inspection only).
10. **Customer Signup Notes**: anything you want kept with the case. It is copied to **Customer Signup Notes** (folder **Contact**) on their contact profile.



Picture: The bottom of the signup form: the consent box and Submit.

1. **Intake consent**, the box **I agree to receive text messages about my case from this office. Reply STOP to opt out.** Ask "OK to text you updates?". Yes: check the box. It records their permission on their contact profile (**Intake consent**, folder **CASE**) and on the signup PDF. No: leave the box empty and submit. The first texts go out within two minutes, so stop them straight away: in the left menu, click **Contacts**, click in the search box at the top of the list and type the customer's last name, then click their name. At the top of the left side, click the **DND** tab (next to **All fields**) and check **Text Messages**; it saves by itself and stops every text to them. Then tell us the RO number (in the left menu, click **Support**, then the orange **Support Ticket** button) so we keep them on email only. The RO number is in the text your phone gets two minutes after you submit ("new [type] case #N").

When you click **Submit**, the page says "Thank you. We have your case".

Hi Delta, this is Sarah with Collision Safety Consultants of PA. We have your post-repair inspection case, file #1011. John Hayduk is your appraiser. Text this number any time and I'll answer or get John Hayduk to you.
Reply STOP to opt out

Hi Echo, this is Sarah with Collision Safety Consultants of PA. We have your post-repair inspection case, file #1012. John Hayduk is your appraiser. Text this number any time and I'll answer or get John Hayduk to you.
Reply STOP to opt out

the booking text and its link

Delta, let's book your inspection. We meet you with the car in the main lobby of 101 Woodbine Rd, Downingtown, PA 19335; pick any time that suits you with the link in my next text. Would you rather we come to you? Reply TRAVEL and John Hayduk will call.

<https://pdros-cscpa>

Picture: A customer's phone: Sarah's welcome text, then the booking text with its link, as the customer sees them.

What happens in the next two minutes

1. pdrOS makes the customer's contact profile and gives the case its RO number. Your name goes in **Appraiser** (folder **CASE**). The signup PDF is saved in **Customer Signup Form PDF** (folder **FORM | Customer Signup**).
2. The customer gets the welcome text ("this is Sarah with Collision Safety Consultants of PA. We have your [type] case, file #N. John Hayduk is your appraiser. Text this number any time") and the welcome email with the RO number.
3. The request for that type goes. Total loss: the valuation report ask plus the upload link. Diminished value: invoice, mileage and photos plus the upload link. Short pay: a short text to the owner and the upload email to the shop. Inspection at the office: the booking text and link. Inspection with travel: a text saying you will call, and a task for you.
4. Sarah is switched on for them.

5. Your phone gets "new [type] case #N". N is the RO number.
6. The case sits at stage 1.1; the documents or booking reminders start by themselves.

Your first task comes when there is something to do: documents in, a shop estimate to enter, or a travel inspection to book.

Find the new customer and check what the form saved

Two minutes after you submit, open their contact profile and check that the form landed.

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. Look at the top of the left side, under their name: the RO number is next to **RO# DO NOT EDIT THIS!!** (pdrOS sets it, so never change it), and **RO Type** is under it.
5. On the left side of the contact profile, scroll down to the folder **Contact** and click the folder's name to open it. Check **Phone** and **Email**. **Customer Vehicle / Customer Signup Form** shows the vehicle.
6. On the left side of the contact profile, scroll down to the folder **REPAIR STATUS** and click the folder's name to open it. **RO Type** shows the type you picked.
7. On the left side of the contact profile, scroll up to the folder **CASE** and click the folder's name to open it. Check **Claim side** (Insured or Claimant), **Fee payer** (Owner or Shop) and **Intake consent** (checked if they said yes to texts). **Appraiser** shows your name.

You only looked, so there is nothing to save.

To see the signup sheet as a PDF: in the left menu, click **RO Hub**. Click in the box under **RO #:** at the top (it reads Enter repair order number), type the RO number (your case number) and click **Search**. Click the small **Docs** button, to the right of the **Contacts** button. The **RO Documents** window opens; click **Customer Signup Form** and it opens in a new browser tab.

If a typed answer is wrong (a claim number, say), open its folder (the table below says which), click in the box under the field and type it correctly. Then click the blue **Save** button at the bottom of the left side. If the type is wrong, see [Wrong type, or the type changed later](#).

← Contact Details

BZ Bravo Zztest

Owner: JH John Hayduk

Followers: [User Icon]

Tags (11): appraisal, diminished value, appraisal-docs-in, appraisal-report-in, appraisal-hired, appraisal-demand-sent, 5 more

RO# DO NOT EDIT THIS!!
1010

RO Type
diminished value

RO number
RO Type

All fields DND Actions

Picture: The top of the left side: RO# DO NOT EDIT THIS!! and RO Type pinned under the tags, both circled.

Where each answer lands

Arrows mean: click this, then this. Every folder is on the left side of the contact profile.

On the form	On the contact profile
First Name, Last Name, Email, Phone	folder Contact (the name also shows at the top of the left side)
Repair Order Type	folder REPAIR STATUS → RO Type
Customer Vehicle	folder Contact → Customer Vehicle / Customer Signup Form
Insurance Company, Claim #	folder Insurance Info → Insurance Company, Claim #
Claim side (Insured / Claimant)	folder CASE → Claim side
Date of Loss	folder FORM Repair Authorization → Date of Loss
Referring shop, contact and email	folder CASE → Referring shop, Referring shop contact, Referring shop email
How they found us, Carrier's offer	folder CASE → How they found us, Carrier's offer

On the form	On the contact profile
Other appraiser name, Other appraiser email, Other appraiser phone, Demand-by date	folder CARRIER & APPRAISER → the fields with the same names
Shop estimate total, Carrier estimate total, Inspection location	folder SHORT PAY & INSPECTION → the fields with the same names
Owner / Shop (who pays the fee, when the form asks)	folder CASE → Fee payer
Customer Signup Notes	folder Contact → Customer Signup Notes
Intake consent	folder CASE → Intake consent

If you picked the wrong type

See [Wrong type, or the type changed later](#).

Getting help

Answers: how do I reach support? how do I open a support ticket? what should I send? where is the newest note? what can the chat answer?

Ask the support chat first. Ask a person when the chat cannot tell you, or when something went to the wrong customer or insurer.

How to reach us

1. In the left menu, click **Support**. The support page opens: the chat sits at the top, under the heading **Need help now?**, and this guide sits under the chat and in the list on the left.
2. To ask the chat, type your question in the chat box and press Enter.
3. To ask a person, click the orange **Support Ticket** button under the chat.
4. Type your name, your email and your question in the form.
5. Click the button at the bottom of the form to send it.
6. Within minutes you get an email saying we are on it. We answer by email or call you.

To find a page of this guide, click in the **Search** box at the top of the support page and type a word from your question (for example "demand" or "umpire"). The pages that use it appear as you type.

What to send us

Four things, and we can usually answer in minutes:

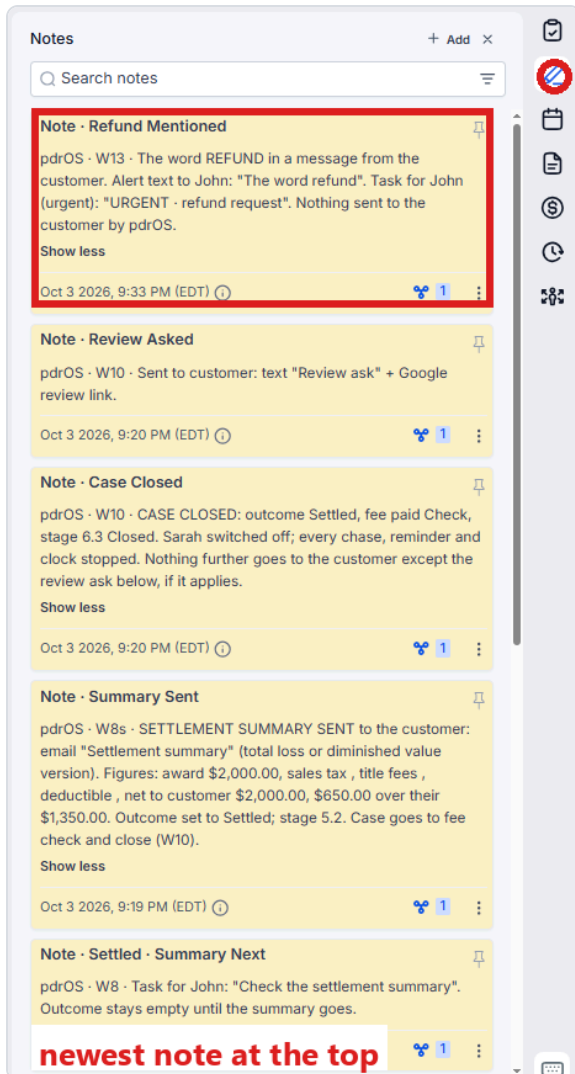
1. The **RO number** (your case number). It is on every task (CASE #1007) and every text to your phone (case #1007).
2. **What you did** (the field, the switch, the upload) and **when**.
3. **What you expected** to happen.
4. A screenshot of the **newest note** on the customer's contact profile (how to find it is just below).

The notes on the contact profile tell us the rest.

Finding the newest note

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.

4. On the far right edge of the contact profile, click the **Notes** icon (it looks like a pen; hold the mouse over the icons to see their names). The notes open beside it, newest at the top.
5. Take a screenshot of the top note: press the Windows key, Shift and S together, then drag a box around the note (on a Mac: Command, Shift and 4).
6. Attach the picture to your support ticket.



Picture: The Notes icon (a pen) on the right edge circled, the notes open beside it, newest at the top, + Add circled.

Our promise

If a step does not fit how you work, do not work around it. Tell us. We change the step, the wording or the timing on our side, usually within a day, and the change holds for every case after. A workaround on your side usually means a chase goes to the wrong person or a customer gets a message twice.

What the support chat can answer

- How to do anything in this guide (it reads these pages).
- What a task or a text to your phone means.
- What a field or a switch starts.
- Where a document, a date or a message is.

When to ask a person

- Something went to the wrong customer, adjuster or shop.
- A customer or an insurer says they got nothing and the case shows it sent.
- Your phone says "the intake for NAME did not finish".
- A customer opens a second case on the same phone (tell us that day; we move the phone number to the new case).
- Anything about money that the agreement does not settle.
- Sarah said something you would not say.

While you wait

Nothing in pdrOS needs a reply within minutes except a customer. If a task is urgent, call the customer first and write the note after. Chases, reminders and clocks keep running on their own.

To write the note after the call:

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. On the far right edge of the contact profile, click the **Notes** icon (it looks like a pen).
5. Click + **Add** at the top of the notes.
6. Type a title and the note.
7. Click **Save** in the note.

Then mark the task complete:

1. In the left menu, click **Tasks**. **My Tasks** opens. You are in the right place when you see the boxes **Overdue**, **Due Today**, **This Week** and **Completed** at the top.
2. Click the task's row. A short preview opens under it.
3. Click **Open Full View**.

4. Click the green **Mark Complete** button at the bottom right of the full view. If the task is already gone when you come back, pdrOS closed it because the step happened.