

PDROS

pdrOS for Collision Safety Consultants of PA

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".

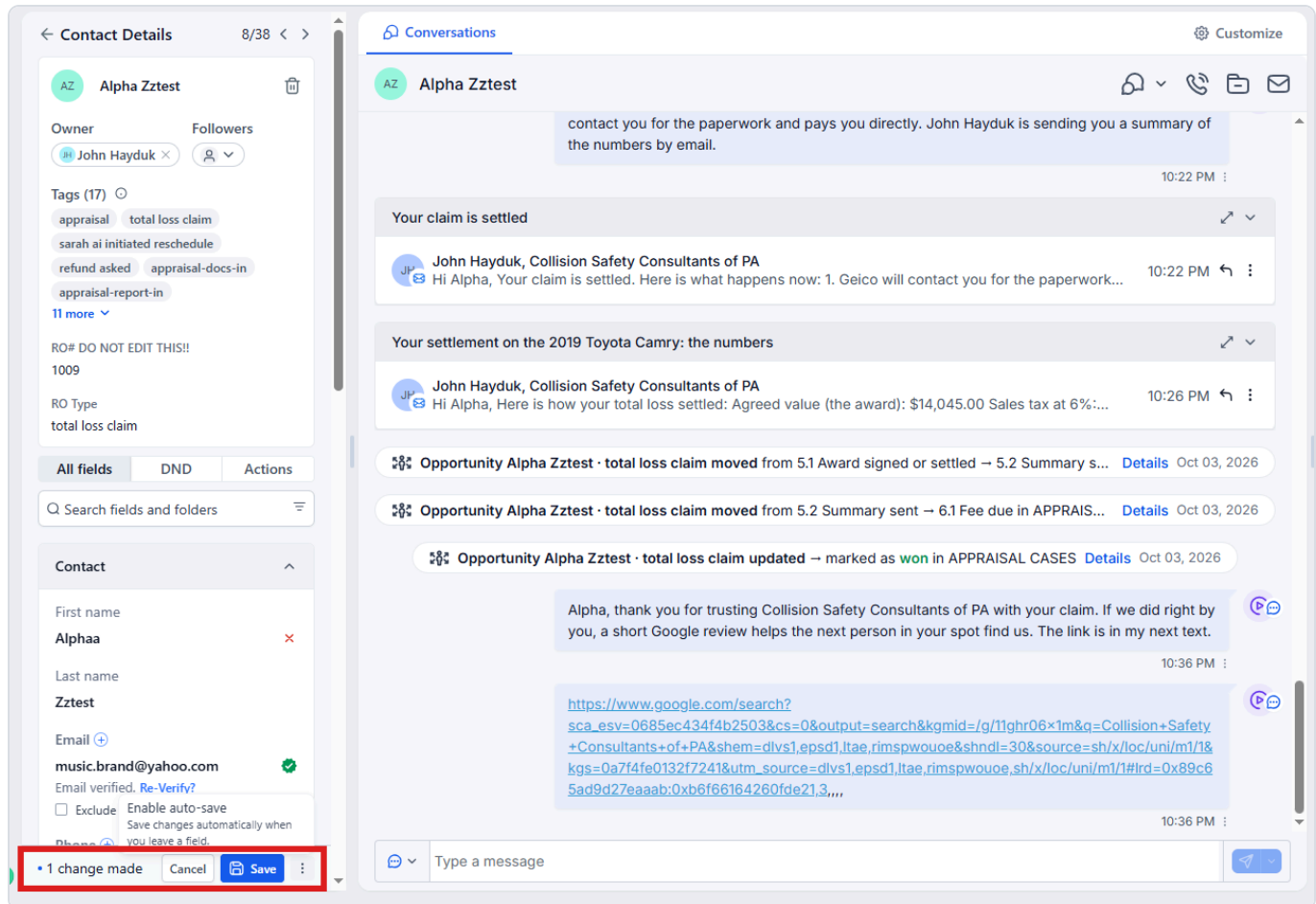
Throughout this guide, every field or switch that starts work is marked ✂ the first time it appears, with one line on what it starts.

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.

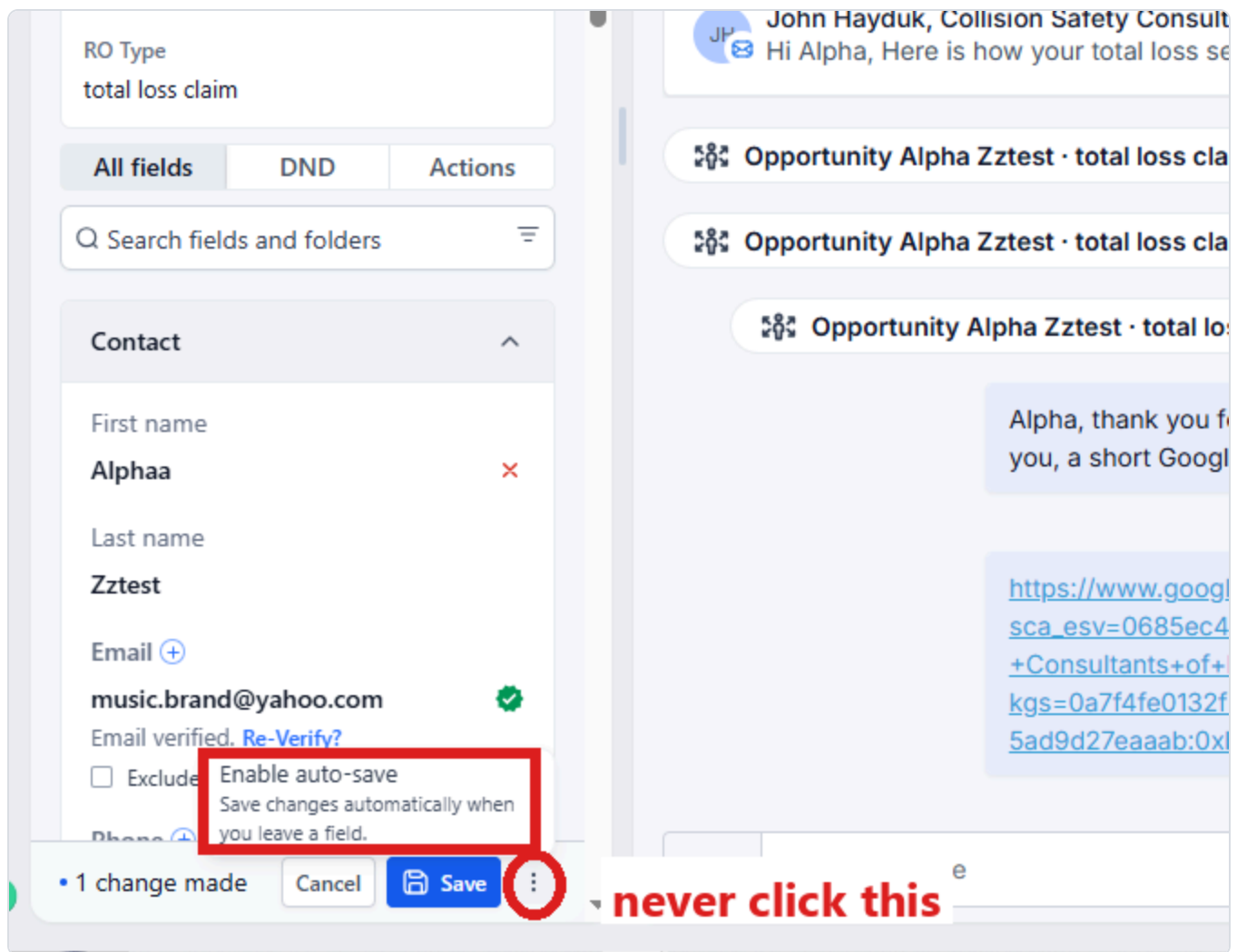
Two habits that keep you safe

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?

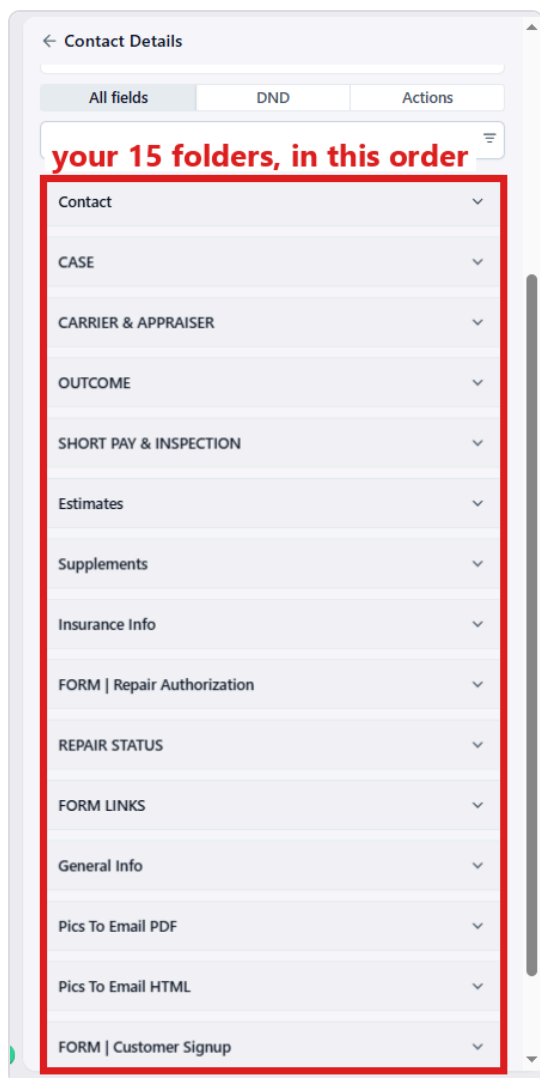
One total loss from signup to close is fourteen moves. Do them in this order. Each move says where to click, step by step, and links to the page with the detail.

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](#).

For Sharon: your part

Answers: what is Sharon's job in pdrOS? which tasks are hers? what does she click for each one? what does she not touch?

Sharon, your work in pdrOS is the Tasks page. A task appears when a customer or a case needs the office. You read it, do the one thing it says, and click **Mark Complete**.

Your login and your list

You sign in at **app.bc3d.agency** in your web browser, with your own email and password. In the left menu, click **Tasks**. **My Tasks** opens with your tasks. If you also see a tab **All Tasks (Admin)**, it shows John's tasks too; stay on **My Tasks**.

Texts about your tasks come to the office phone (your cell; we set it on day one).

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.

Your 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 a box to see those tasks.
3. Click the task's row. A short preview opens under it.
4. Click **Open Full View**. Read the task: the customer, the facts, and **DO THIS**.
5. Click the link under **WHERE** (in most of your tasks it follows the words "Conversation and case"; in the CCC1 task it follows "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. Do the step. Your tasks are below, each with its clicks.
7. If you changed a field, click the blue **Save** button at the bottom of the left side.
8. Click the browser tab with the Tasks page.
9. Click the green **Mark Complete** button at the bottom right of the full view.
10. 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**.

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. Never click **Enable auto-save** (it is under the three dots next to the blue Save button). Some tasks say "green Save button"; they mean this blue one.

Your tasks, click by click

Every task below, except the CCC1 one, starts with steps 1 to 5 of the loop above and ends with steps 8 to 10.

The list with what each task means: [The tasks you will see](#).

Enter the shop's estimate in CCC1 · NAME

On a short pay, when both estimates are in. The files are in the task. [Short pay](#)

1. In the left menu, click **Tasks**.
2. Click the task's row. A short preview opens under it.
3. Click **Open Full View**.
4. In the task, click the link to the shop's estimate. The file opens.
5. Enter the shop's estimate in CCC1.

6. Click the browser tab with the Tasks page.
7. Click the green **Mark Complete** button at the bottom right of the full view.

The same two files are also on the customer's contact profile. Click the link under **WHERE**. On the left side, scroll down to the folder **CASE** and click the folder's name to open it. Click the file's name in **Shop estimate PDF** or **Carrier estimate PDF**.

Customer has a money question · NAME

The fee, or how to pay. Never a figure about the claim (the offer, John's number, the award, the net). For those, tell the customer John will come back to them, and tell John.

In the left menu, click **Tasks**. Click the task's row, then **Open Full View**. Click the link under **WHERE**. Then:

1. In the middle of the contact profile, read their last few messages (newest at the bottom). What exactly are they asking?
2. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **SMS** (or **Email** if they emailed).
3. Click in the box and type your answer. The fee answer is in the task.
4. Click the paper-plane button at the right end to send.
5. 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).
6. Click **+ Add** at the top of the notes.
7. Type a title and the note: the question and what you answered.
8. Click **Save** under the note you typed. (The blue Save button at the bottom of the left side is only for fields.)

Then click the browser tab with the Tasks page and click the green **Mark Complete** button at the bottom right of the full view.

Customer wants a date or an update · NAME

Tell them the next step from **Case status** (folder **CASE**). Never promise a settlement date.

In the left menu, click **Tasks**. Click the task's row, then **Open Full View**. Click the link under **WHERE**. Then:

1. In the middle of the contact profile, read their last few messages.
2. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it.

3. Read **Case status**: one plain sentence on where the case stands. (The task shows it too.)
4. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **SMS** (or **Email** if they emailed).
5. Click in the box and type the next step and who it waits on.
6. Click the paper-plane button at the right end to send.
7. On the far right edge of the contact profile, click the **Notes** icon (a pen).
8. Click + **Add** at the top of the notes.
9. Type a title and the note: what you told them.
10. Click **Save** under the note you typed. (The blue Save button at the bottom of the left side is only for fields.)

Then click the browser tab with the Tasks page and click the green **Mark Complete** button at the bottom right of the full view.

Customer gave new contact or case details · NAME

Update the contact profile within the hour. Where each new detail goes, on the left side of the contact profile:

- **A new phone or email**: folder **Contact** → **Phone, Email**.
- **A new address**: folder **General Info**. On a travel inspection, also tell John the new address.
- **Claim #** or **Insurance Company**: folder **Insurance Info**.
- **Adjuster name, Adjuster email, Other appraiser name, Other appraiser email** or **Other appraiser phone**: folder **CARRIER & APPRAISER**.

In the left menu, click **Tasks**. Click the task's row, then **Open Full View**. Click the link under **WHERE**. Then:

1. In the middle of the contact profile, read their last few messages. Note the new details exactly as they wrote them.
2. On the left side of the contact profile, scroll down to the folder from the list above and click the folder's name to open it.
3. Click in the box that holds the old detail and delete it.
4. Type the new detail. Check the spelling of any email: pdrOS sends the demand and the chases to it.
5. Click the blue **Save** button at the bottom of the left side.
6. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **SMS**.
7. Click in the box and type: "Thank you, I have updated your [phone/email/address]; you will get our updates there from now on."

8. Click the paper-plane button at the right end to send.
9. On the far right edge of the contact profile, click the **Notes** icon (a pen).
10. Click + **Add** at the top of the notes.
11. Type a title and the note: what changed, old and new.
12. Click **Save** under the note you typed. (The blue Save button at the bottom of the left side is only for fields.)

Then click the browser tab with the Tasks page and click the green **Mark Complete** button at the bottom right of the full view.

Customer asked for a document • NAME

They want a copy of the agreement, John's report or the settlement summary. Anything about the other side's report or figures: John decides what is shared; ask him.

Where each one is:

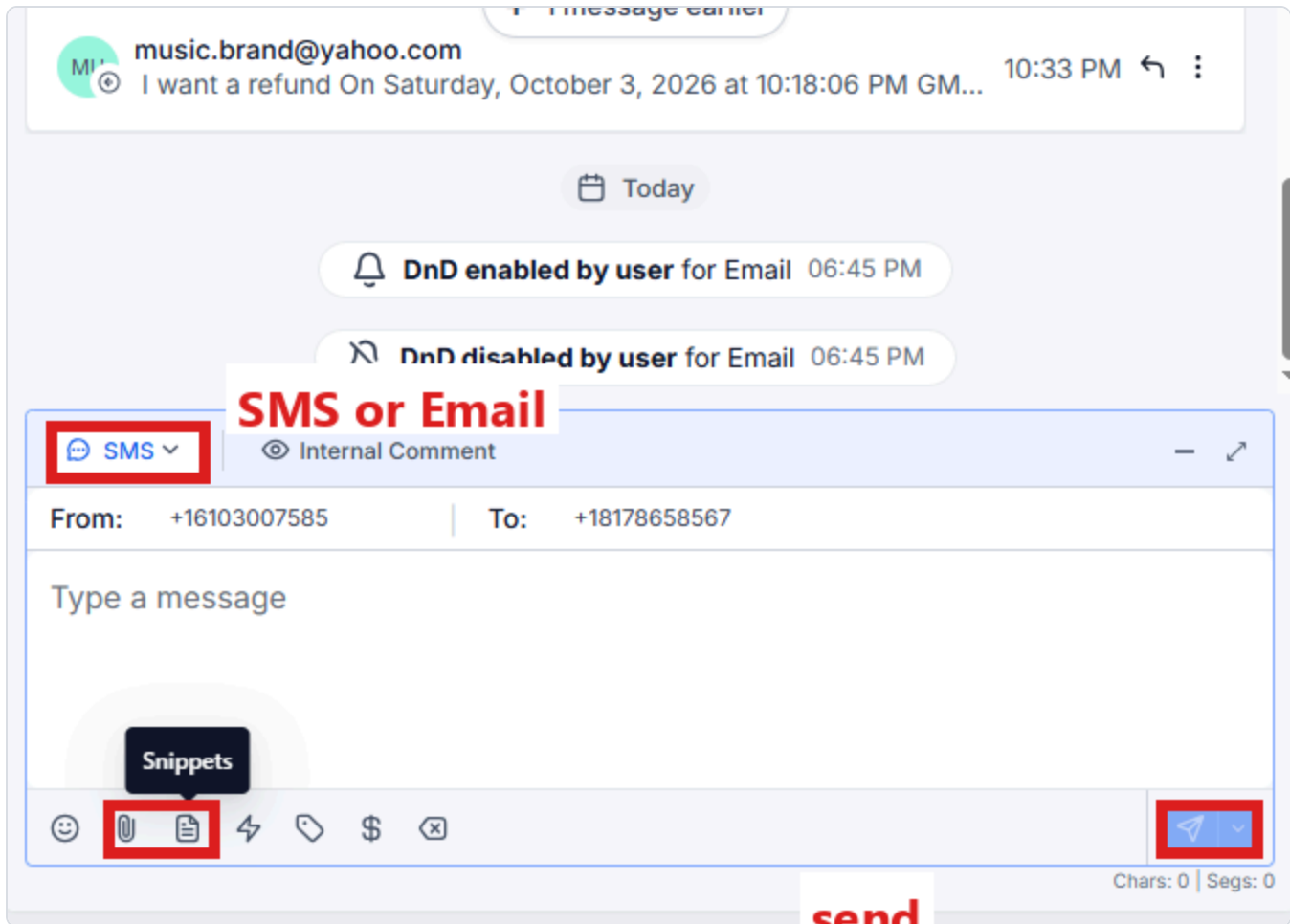
- **The signed agreement:** in the left menu, **Forms / Pics** → the customer by RO number → **Filled Forms** → the card **Repair Authorization Form PDF** → **Open PDF**.
- **John's report:** on the contact profile, folder **Estimates**, the file in **Upload Estimate Doc Here** (click its name).
- **The settlement summary** is an email, not a file. It went on the date in **Settlement summary sent date** (folder **OUTCOME**).

To send the agreement, get the PDF first: in the left menu, click **Forms / Pics**. Click in the box under **RO #:** at the top (it reads Enter repair order number), type the RO number and click **Search**. Click the tab **Filled Forms**. On the first card, **Repair Authorization Form PDF**, click **Print/Download** and save the PDF to your computer.

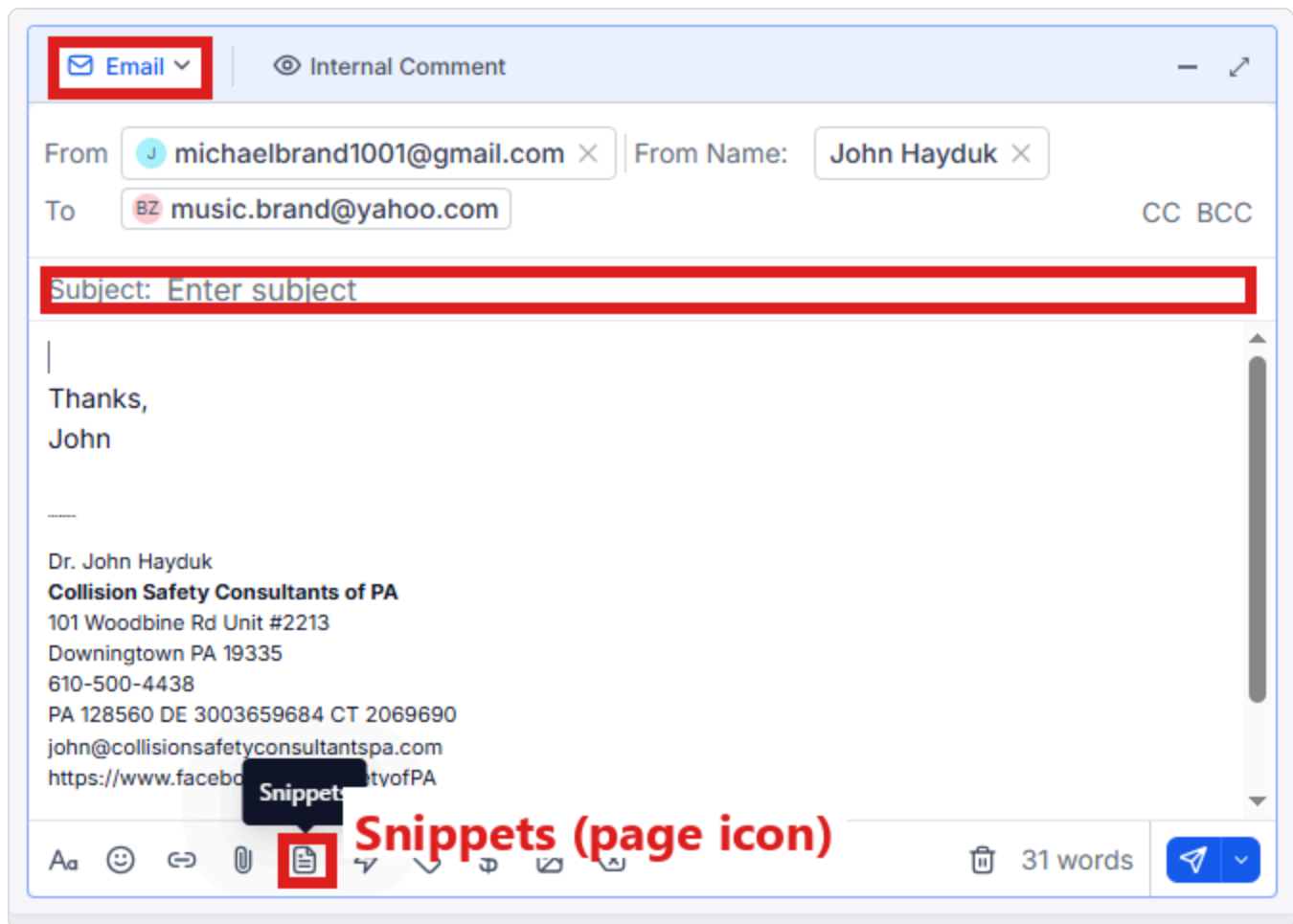
Then: in the left menu, click **Tasks**. Click the task's row, then **Open Full View**. Click the link under **WHERE**. Then:

1. For John's report (skip this step for the agreement): on the left side of the contact profile, scroll down to the folder **Estimates** and click the folder's name to open it. Click the file's name in **Upload Estimate Doc Here**; the PDF opens in a new browser tab. Save it with the browser's download button (a down arrow at the top of the PDF).
2. Click the browser tab with the contact profile.
3. Check that you are on the right customer: their name is at the top left.
4. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **Email**.
5. The box grows to show the subject line. Click in the subject line and type a subject.

6. Click in the box and type a short message.
7. Click the paperclip icon and pick the PDF you saved.
8. Click the paper-plane button at the right end to send.



Picture: The message box at the bottom of the middle: the button with the down arrow (SMS or Email), the Snippets icon, the paperclip and the paper-plane send button.



Picture: The email window: Email picked at the top left, the Subject line, and the Snippets icon (a page) at the bottom.

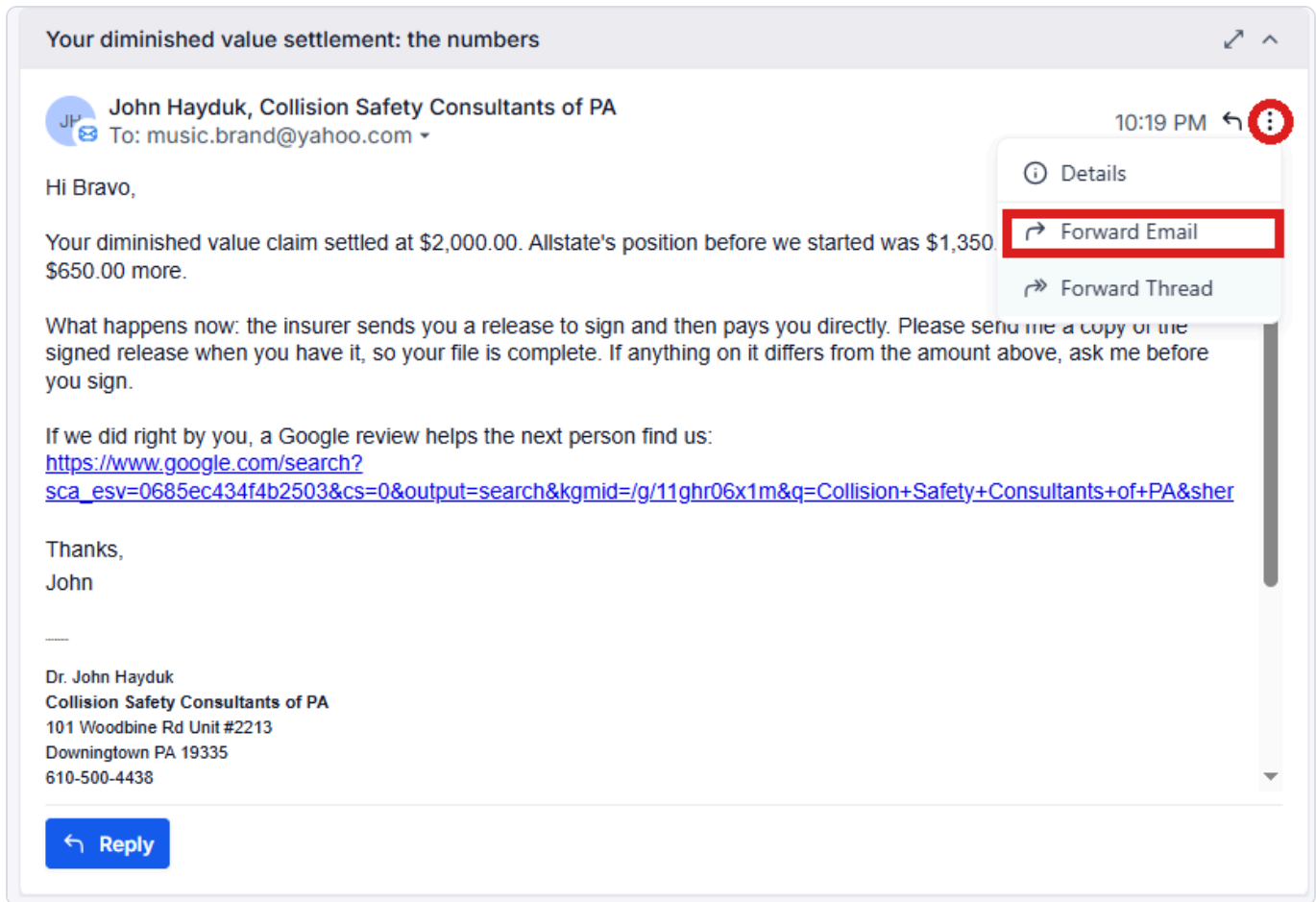


Picture: A PDF open in a browser tab, the download button circled.

To send the settlement summary again:

1. On the left side of the contact profile, scroll down to the folder **OUTCOME** and click the folder's name to open it.
2. Read the date in **Settlement summary sent date**.
3. In the middle of the contact profile, scroll up to that date.

4. Click the settlement summary email. It opens in full.
5. Click the three dots at the top right of the email and pick **Forward Email**.
6. Check that the customer's email is in the To box, then click the paper-plane button to send.



Picture: A settlement summary email opened in full in the middle, its three-dot menu open with Forward Email circled.

Then add a note of what you sent:

1. On the far right edge of the contact profile, click the **Notes** icon (a pen).
2. Click **+ Add** at the top of the notes.
3. Type a title and the note: what you sent.
4. Click **Save** under the note you typed. (The blue Save button at the bottom of the left side is only for fields.)

Then click the browser tab with the Tasks page and click the green **Mark Complete** button at the bottom right of the full view.

URGENT · unhappy customer · call within the hour · NAME

Call within the hour, by phone, not by text.

In the left menu, click **Tasks**. Click the task's row, then **Open Full View**. Click the link under **WHERE**. Then:

1. In the middle of the contact profile, read the conversation. What went wrong?
2. On the far right edge of the contact profile, click the **Notes** icon (a pen) and read the notes.
3. The task asks you to switch Sarah off for this customer while you handle it. Her switch is not on your screen, so tell us: in the left menu, click **Support**, then the orange **Support Ticket** button, with the customer's name and "please switch Sarah off". We do it within the hour, and switch her back on when you say.
4. Call them by phone. If you cannot fix it, tell John today.
5. In the notes, click + **Add** at the top.
6. Type a title and the note: when you called, the issue, what you promised.
7. Click **Save** under the note you typed. (The blue Save button at the bottom of the left side is only for fields.)

This task's own words say: mark it complete only when the customer says they are satisfied. Then tell us (in the left menu, click **Support**, then the orange **Support Ticket** button) to switch Sarah back on. More on Sarah: [Sarah](#).

Sarah needs a person · NAME

Most often to move or cancel an inspection. Read first; do nothing until you know exactly what they want.

In the left menu, click **Tasks**. Click the task's row, then **Open Full View**. Click the link under **WHERE**. Then:

1. In the middle of the contact profile, read the whole conversation. Say in one line what they want.
2. If it is not clear, ask them in the message box and wait for the answer.
3. On the far right edge of the contact profile, click the **Appointments** icon (a calendar). You are in the right place when the panel's title reads **Appointments**.

To cancel the inspection:

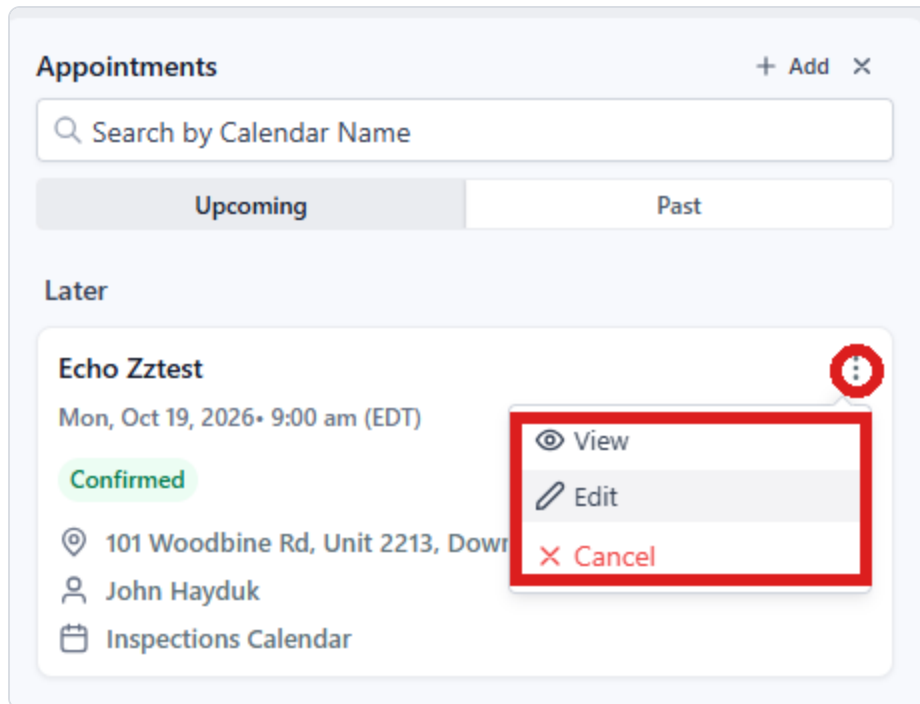
1. Click the three dots at the right of the appointment and pick **Cancel**.

pdrOS texts the customer a link to pick a new time, and tells John.

To move the inspection:

1. Click the three dots at the right of the appointment and pick **Edit**. The **Edit details** panel opens.
2. Under **Date & time**, click **Date** and pick the new day, then click **Slot** and pick the new time.
3. Click **Save** at the bottom right of the panel.

pdrOS sends the customer the new confirmation. Never type a new name into the calendar.



Picture: An appointment card on the right edge: its three dots open with View, Edit and Cancel.

Edit details

Appointment title
Echo Zztest

Calendar
Inspections Calendar

Calendar type: **Personal booking**

Team member
John Hayduk

Date & time

Showing slots in this timezone: (Account timezone)
GMT-04:00 US/Eastern (EDT)

☐ Also update Contact timezone to US/Eastern

Default Custom

Date Slot

Mon, Oct 19th, 2026 9:00 AM - 10:00 AM

Date and Slot
Meeting location

☒ Calendar default
As confirmed in the calendar

☐ Custom
Set specific to this appointment

☒ Confirmed

☐ Add details

☐ Cancelled

☐ Showed

☐ No show

☐ Invalid

Status

Status: ☒ Confirmed

Cancel Save

Picture: The appointment's Edit details panel: Date and Slot, and the Status box at the bottom, circled.

Anything else: answer it in the message box, or hand it to John with a note.

Then add a note of what they wanted and what you did:

1. On the far right edge of the contact profile, click the **Notes** icon (a pen).
2. Click **+ Add** at the top of the notes.
3. Type a title and the note.
4. Click **Save** under the note you typed. (The blue Save button at the bottom of the left side is only for fields.)

Then click the browser tab with the Tasks page and click the green **Mark Complete** button at the bottom right of the full view.

Sarah handover · NAME

Sarah stopped answering this customer for 8 hours. John has a one-line **User query** task with what they asked.

In the left menu, click **Tasks**. Click the task's row, then **Open Full View**. Click the link under **WHERE**. Then:

1. In the middle of the contact profile, read the conversation.
2. Agree with John which of you replies.
3. To reply: at the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **SMS**.
4. Click in the box and type your reply.
5. Click the paper-plane button at the right end to send.

Then click the browser tab with the Tasks page and click the green **Mark Complete** button at the bottom right of the full view.

Without a task

Book, move or cancel an inspection when a customer asks

Book only from the customer's contact profile. Never type a new name into the calendar. [Booking the visit](#)

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 far right edge of the contact profile, click the **Appointments** icon (a calendar). You are in the right place when the panel's title reads **Appointments**.

To book:

1. Click + **Add** at the top of the panel. A small menu opens; click **Meetings**. The **Book appointment** window opens.
2. Under **Calendar**, make sure it reads **Inspections Calendar** (if not, click the box and pick it).
3. Under **Date & time**, click the box under **Date** and pick the day, then the box under **Slot** and pick a free time.
4. Click the blue **Book appointment** button at the bottom right.

To move:

1. Click the three dots at the right of the appointment and pick **Edit**. The **Edit details** panel opens.
2. Under **Date & time**, click **Date** and pick the new day, then click **Slot** and pick the new time.
3. Click **Save** at the bottom right of the panel.

To cancel, or to mark a no show:

1. To cancel: click the three dots at the right of the appointment and pick **Cancel**.

To mark a no show instead:

1. Click the three dots at the right of the appointment and pick **Edit**. The **Edit details** panel opens.
2. At the bottom of the panel, click the box next to **Status** and pick **No show**.
3. Click **Save** at the bottom right.

Reply to a customer when a task asks you to

[The customer's thread](#) has more on this.

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. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **SMS** for a text or **Email** for an email.
5. Click in the box and type. Keep a text under 320 characters, and put a link in a text of its own.
6. Click the paper-plane button at the right end to send.

Add a note after a call

What was said, what you promised. [Notes, Tasks and Appointments](#)

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).
5. Click **+ Add** at the top of the notes.
6. Type a title and the note.

7. Click **Save** under the note you typed. (The blue Save button at the bottom of the left side is only for fields.)

What you do not do

- You do not set the **Send switches** or type figures (**My number, Counteroffer, Award amount**). Those are John's.
- You do not change the calendar's hours or settings.
- You do not give a customer a dollar figure about their claim. Say John will come back to them, and tell John.

If something looks wrong

If a customer insists on a figure, then do not guess. Say you will have John call them today, and tell John.

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](#).

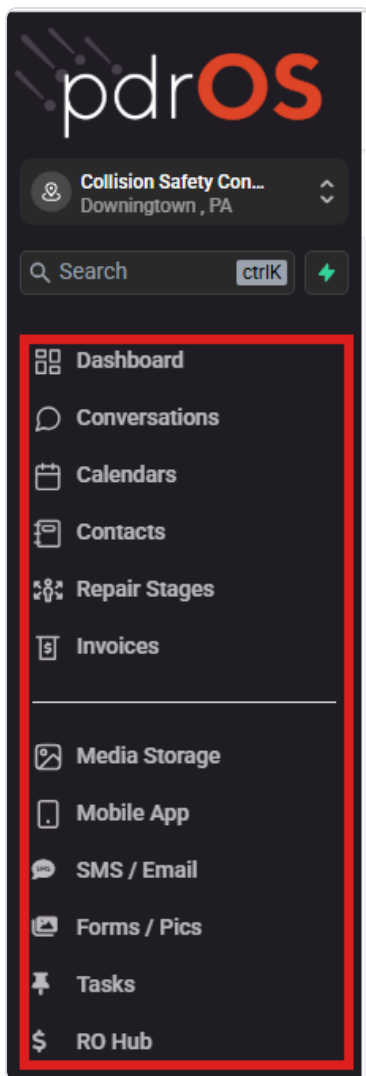
Where things live

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

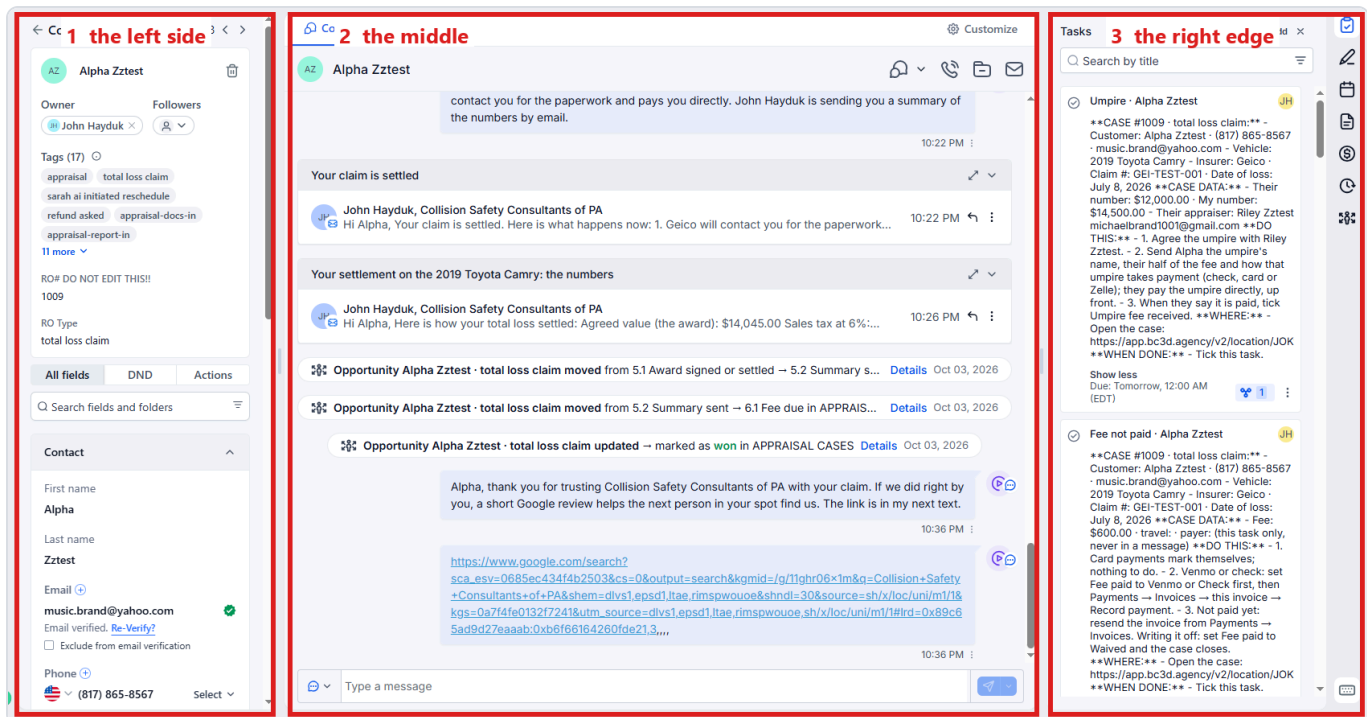
- **Support:** the support chat and, under it, the orange **Support Ticket** button for a person, then this guide, with a **Search** box at the top ([Getting help](#)).

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).

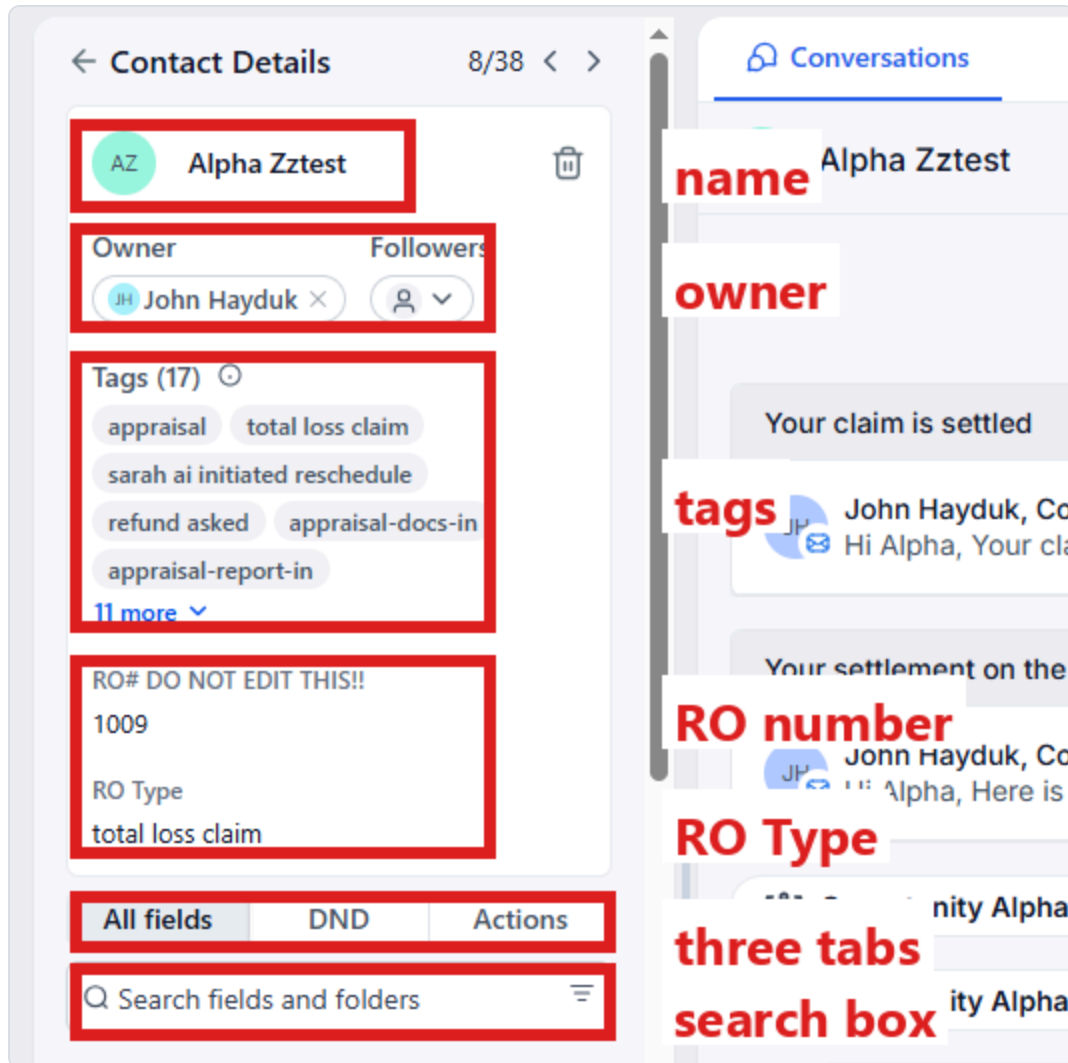
The contact profile has three parts: the left side, the middle and the right edge.

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.

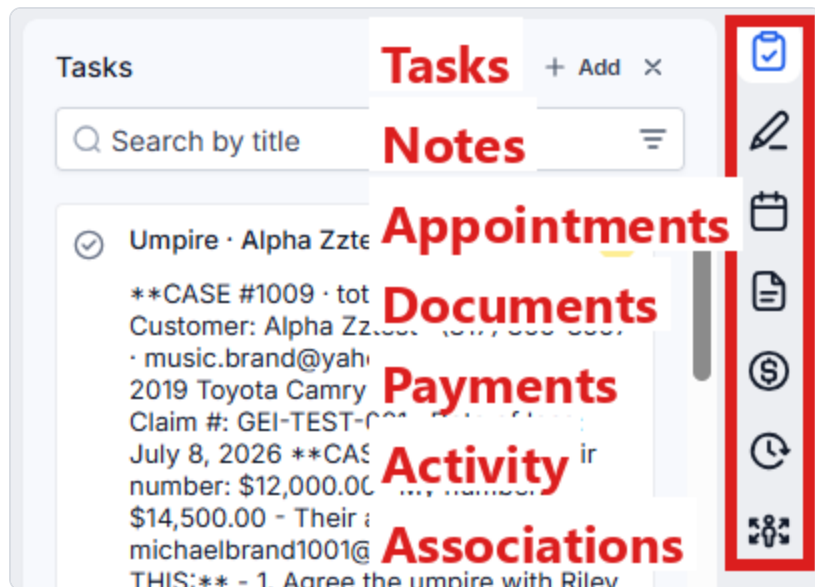
At the very bottom is the message box, where you write a text or an email yourself. At its left end, a small button with a down arrow picks **SMS** (a text) or **Email**. The paper-plane button at its right end sends.

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:

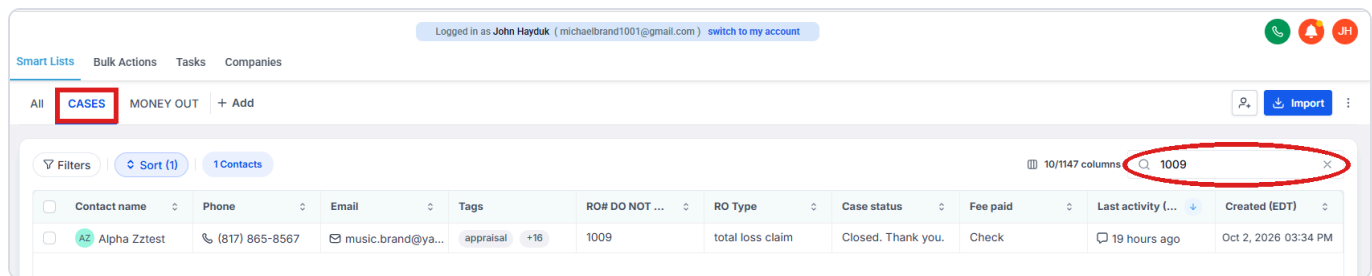
- RO number = RO#, CASE #, case #, file #, case number.
- contact profile = the contact, the customer's details.
- Mark Complete = "Tick this task".
- Send switch = the dropdown, the list.
- RTA = right to appraisal, demand for appraisal.
- the other side = the carrier, the insurer, their appraiser,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

Find a case

Answers: how do I find a customer? how do I open their contact profile? what if I only have the RO number?

Everything you do for a case happens on the customer's contact profile. The search box in **Contacts** opens it from anywhere. A task, a conversation and the RO List each have a shortcut to it too.

From the search box (the main way)

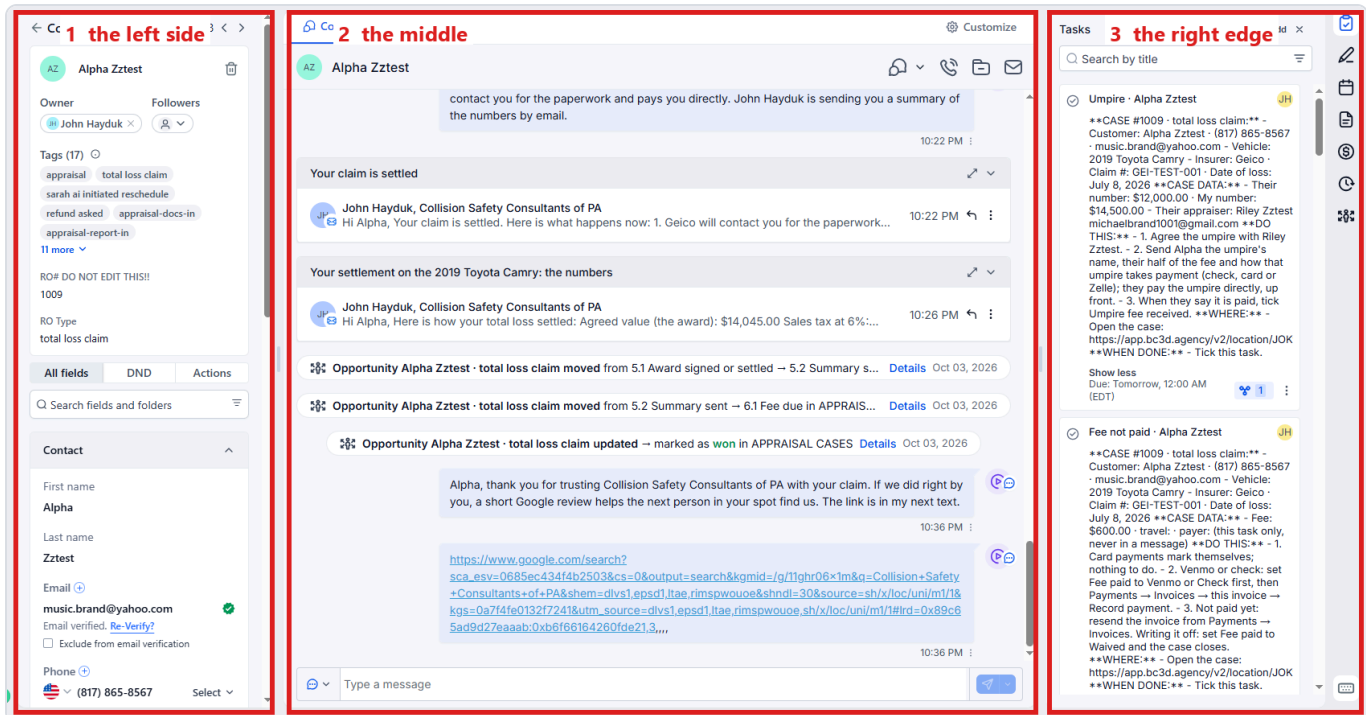


Picture: Contacts: the search box at the top of the list with an RO number typed, circled.

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.

The search also finds a customer by phone number, email or RO Type.



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).

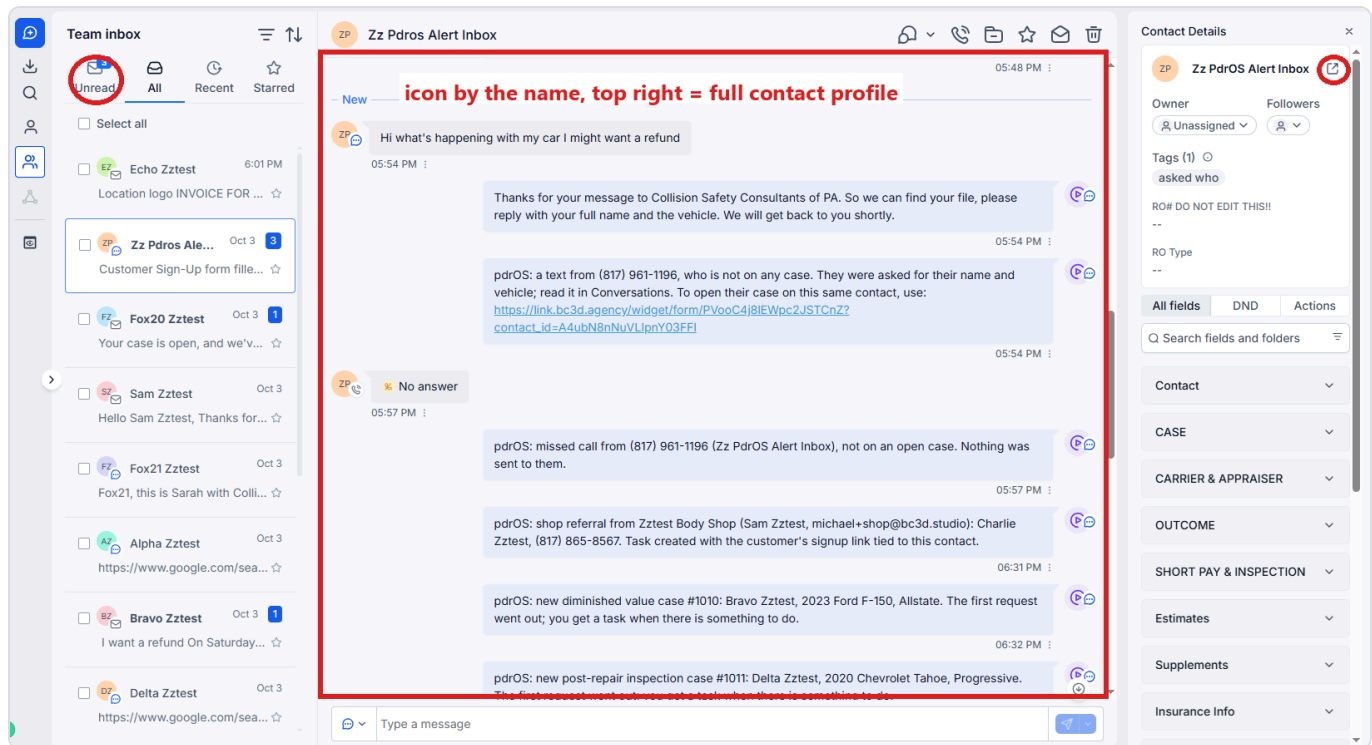
From a task

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**.
4. 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. Your Tasks page is still open in the first browser tab.

From a text or email (Conversations)

1. In the left menu, click **Conversations**. On the left, under the heading **Team inbox** (or **My inbox**), is the list of people.
2. Click **Unread** at the top of the list to see new messages.
3. Click the person's name. Their thread opens in the middle, and their details on the right (the column headed **Contact Details**).
4. At the top of the right column, click the small square-with-an-arrow icon next to the person's name. Their full contact profile opens.



Picture: Conversations: Unread at the top of the list, a thread in the middle, and the small square-with-an-arrow icon next to the name in the right column circled. It opens the contact profile.

From the RO List (every case in one list)

1. In the left menu, click **RO Hub**.
2. Across the top are tabs. Click **RO List**. Every case shows in a list.
3. To find one, click in the search box at the top of the list and type anything you know: the name, the RO number, the VIN, the claim number, the vehicle, the phone, the email or the insurer. The list narrows as you type.
4. Double-click the customer's row. RO Hub opens in a new browser tab with that case loaded on the **Repair Order** tab.
5. In that tab, click the **Contacts** button at the top right (next to the search box and the **Docs** button). The customer's contact profile opens in another tab. Or click **Docs** for the case's documents.

RO #: Search Customer: Contacts Docs Chats Repair Order

Repair Order **RO List**

Repair Order List
Compact view of all repair orders. Use filters to show active or closed ROs.

RO List tab; type anything in the search box; double-click a row

ALL ACTIVE CLOSED IN SHOP NOT IN SHOP NEED POP Search name, RO#, VIN, claim#, vehicle... Advanced Showing 10 of 10 repair orders [Export CSV](#)

Customer	Repair Type	Supp Status	Date In	Date Out	DOL	RO #	Key Tag #	Vehicle	VIN	Claim #	Repair Status	Balance Due	Total Income Collect	Rental Vehicle	SalesReps	Technician
Fox7 Zttest	hall					1017						\$0				
Fox21 Zttest	short pay					1016										
Fox19 Zttest	diminished valu...				7/20/26	1091				ALL-TEST-019						
Fox4 Zttest	hall					1090										
Fox20 Zttest	total loss clai...					1092										
Echo Zttest	post-repair ins...			10/4/24		1012		2019 Jeep Grand Cherokee	1HGCRB2633A084352							
Delta Zttest	post-repair ins...					1011		202 Ferrari	836363822983							
Charlie Zttest	short pay			9/1/26		1013		2022 Honda Accord	1HGCRB2633A084352	SF-TEST-003						
Bravo Zttest	diminished valu...			8/15/26		1010		2023 Ford F-150	1HGCRB2633A084352	ALL-TEST-002		\$0				
Alpha Zttest	total loss clai...			7/8/26		1009		202 Ferrari	836363822983	GEI-TEST-001		\$0				

Picture: RO Hub, the RO List tab: every case listed, the search box above the list and one row circled; the Contacts, Docs and Chats buttons at the top circled too. Double-click a row to load that case.

RO #: Search Customer: Contacts Docs Chats Repair Order

Repair Order **RO List**

Repair Order List
Compact view of all repair orders. Use filters to show active or closed ROs.

Ferrari typed: the list narrows to 2 cases

ALL ACTIVE CLOSED IN SHOP NOT IN SHOP NEED POP Ferrari Advanced Showing 2 of 10 repair orders [Export CSV](#)

Customer	Repair Type	Supp Status	Date In	Date Out	DOL	RO #	Key Tag #	Vehicle	VIN	Claim #	Repair Status	Balance Due	Total Income Collect	Rental Vehicle	SalesReps	Technician
Delta Zttest	post-repair ins...					1011		202 Ferrari	836363822983							
Alpha Zttest	total loss clai...			7/8/26		1009		202 Ferrari	836363822983	GEI-TEST-001		\$0				

Picture: The same list with Ferrari typed in the search box: it narrows to the two cases with that vehicle.

From a text on your phone

The alert text names the customer and the case number. Open their contact profile from the search box. In the left menu, click **Contacts**. Click in the search box at the top of the list and type that name or number. Click the customer's name in the list.

If a customer has two contact profiles

A customer with two claims has two contact profiles with the same phone number. Right after you open a contact profile, before you type anything, check you have the right one:

1. On the left side of the contact profile, click the folder **Contact** to open it. It is the first folder.
2. Read **RO# DO NOT EDIT THIS!!** (the RO number) and **Customer Vehicle / Customer Signup Form** (the vehicle).

If a text from that customer seems to have landed on the wrong contact profile, see [When something goes wrong](#).

If you cannot find them

- Try the phone number without the dashes.
- A customer who texted the 610 number but never signed up has a contact profile with no name: search the phone number. The alert you got for them carries the signup link for that same contact profile.

Other words for this: contact profile = the contact, the customer's details; RO number = RO#, CASE #, case #, file #, case number.

The left side: the folders and what each field does

Answers: what is this field? which folder is it in? how do I open a folder and save a change? what happens when I change it?

The left side of the contact profile holds every fact about the case, in 15 folders. This page walks down them in the order you see them, top to bottom. Fields marked ✂ start work when you save them.

Rule for all of them: pdrOS fills most dates and statuses for you. You type only what the task asks for.

The six things you will touch most

Arrows mean: click this, then this. "The customer" means: search their last name or RO number (your case number) in the Contacts list, then click their name.

Field	Where, and what you do	What it does
Upload Estimate Doc Here ✂	Contacts → the customer → folder Estimates → Upload Estimate Doc Here → Click to upload → your PDF → Open → the blue Save button at the bottom of the left side	Your report or rewrite. Moves the case and gives you the Set the range task.
The five Send switches ✂	Contacts → the customer → folder CASE → the top of the folder → the box under the switch → Send it now → the blue Save button	Each sends one email as you. The Send switches
Their number ✂	Contacts → the customer → folder CARRIER & APPRAISER → Their number → type the amount (numbers only, no dollar sign) → the blue Save button	The other side's figure. Stops every chase, gives you the Negotiate task.
Counteroffer	Contacts → the customer → folder CARRIER & APPRAISER → Counteroffer → type the amount (numbers only, no dollar sign) → the blue Save button	Your next figure, sent by Send counter.
Award amount and Award signed date ✂	Contacts → the customer → folder OUTCOME → Award amount : type the amount; Award signed date : pick the day → the blue Save button	Both together settle the case.
Fee paid ✂	Contacts → the customer → folder CASE → Fee paid → pick Square , Venmo , Check , Cash or Waived → the blue Save button	How the fee was paid; closes the case once it has an Outcome.

Everything else below is there when you need to look something up.

Open the left side

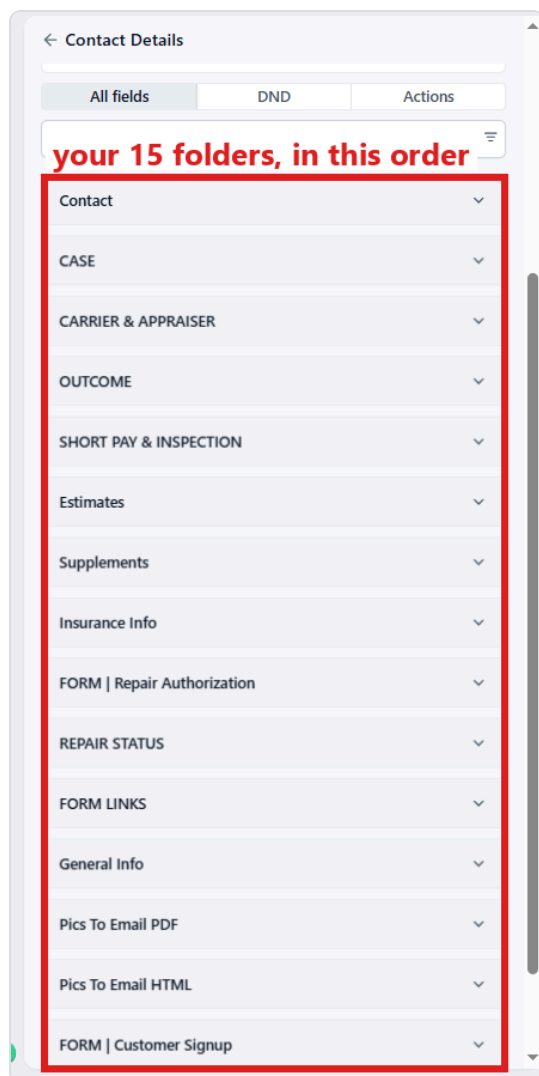
1. In the left menu, click **Contacts**.

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.

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.

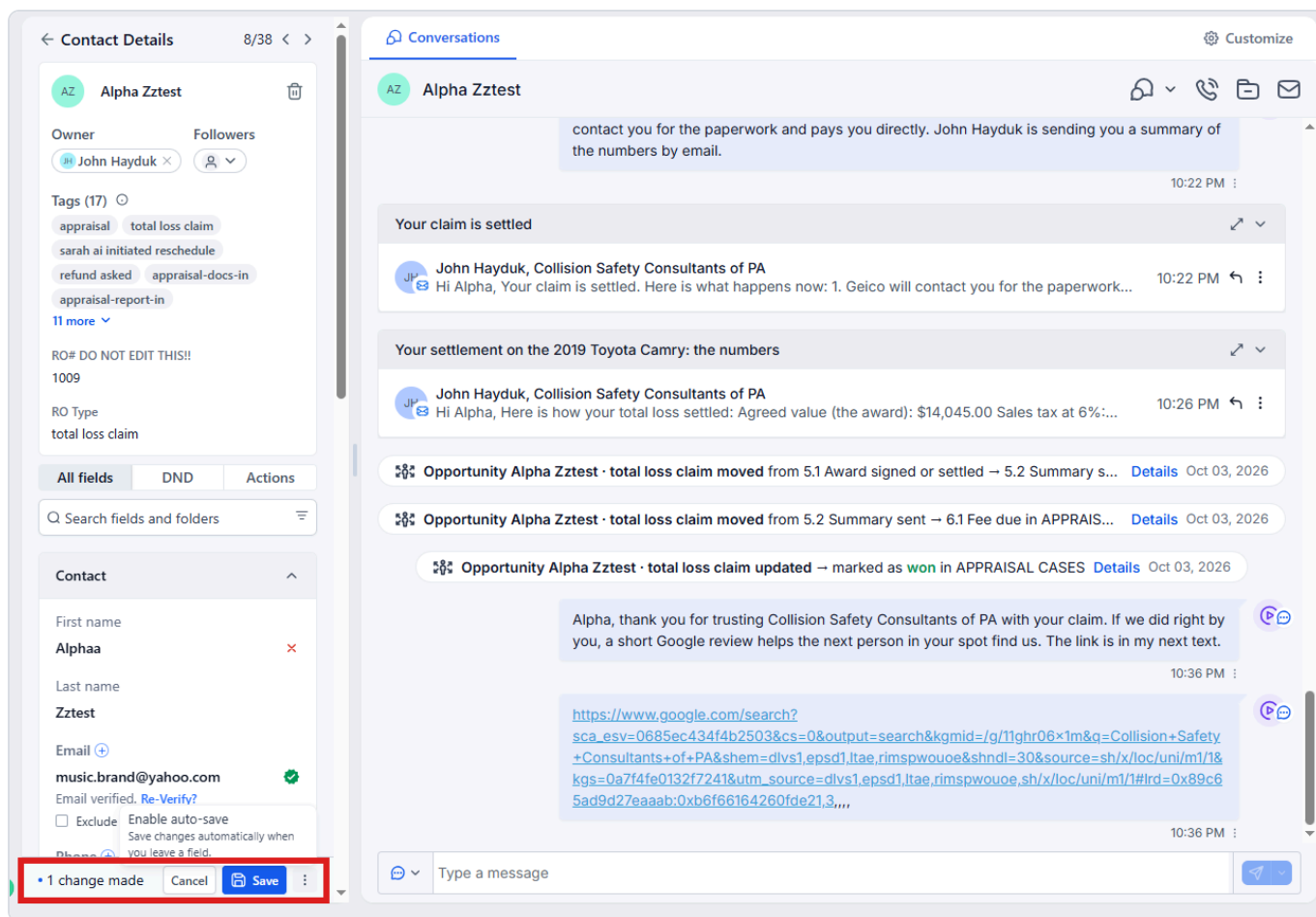
The left side starts with the customer's name, with **Owner** and **Followers** under it. Then come **Tags**, the RO number (**RO# DO NOT EDIT THIS!!**) and **RO Type**, three tabs (**All fields**, **DND**, **Actions**; stay on **All fields**), the **Search fields and folders** box, and then the 15 folders.



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

Change a field and save it

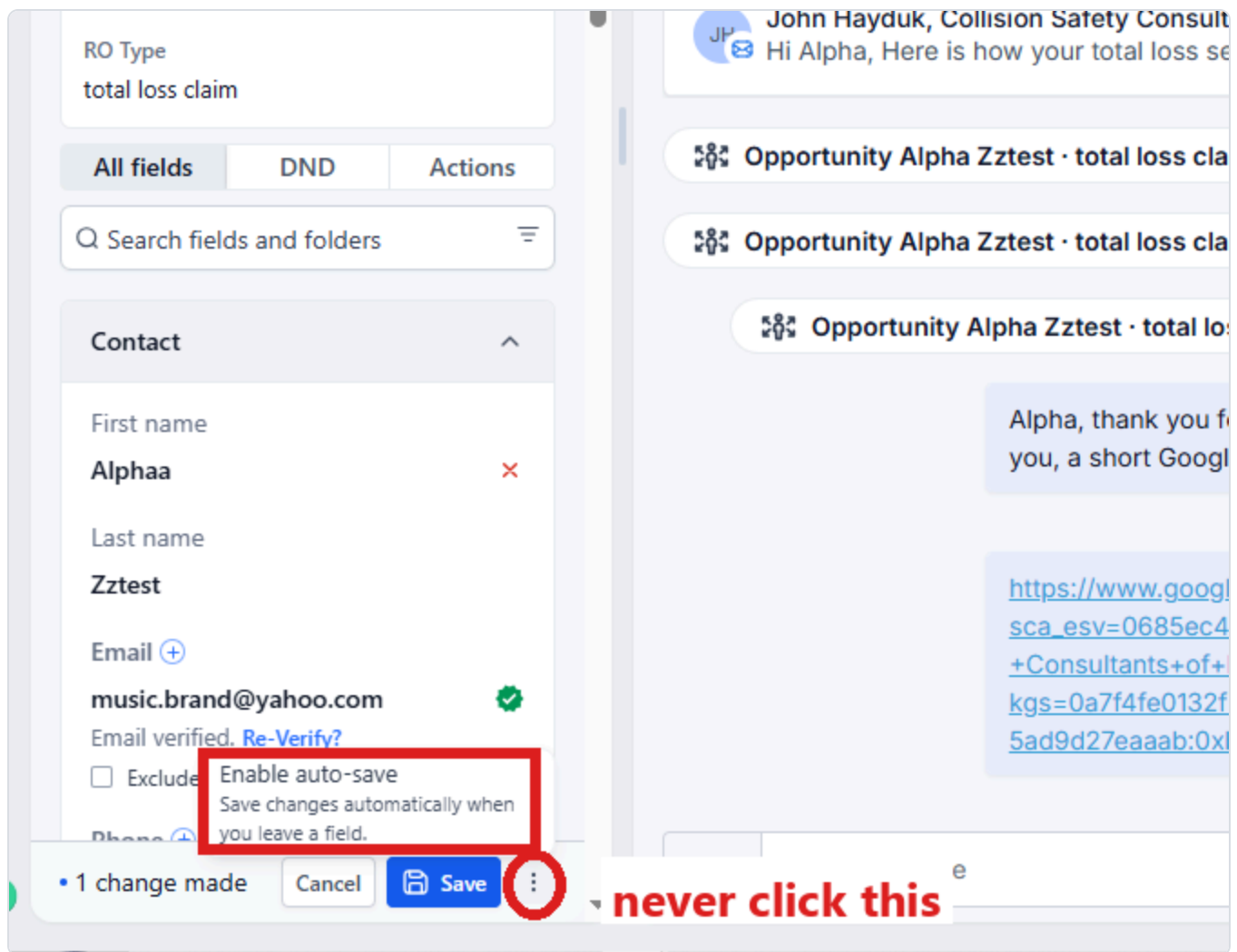
1. Open the customer's contact profile ("Open the left side", above).
2. On the left side of the contact profile, scroll down to the folder and click the folder's name to open it.
3. Find the field. Can't find it? Type the field's name in the search box at the top of the left side (it reads **Search fields and folders**).
4. Change the field. What you do depends on its type:
5. A list: click the box under the field and pick the choice from the list.
6. Claim side and Fee payer: lists; click the box under the field and pick the choice.
7. A checkbox (**Intake consent**): leave it; the signup form fills it.
8. A date: click the box under the field and pick the day in the calendar that opens.
9. Money, a number or text: click in the box under the field and type. Amounts are numbers only, no dollar sign.
10. A file: in the field, click **Click to upload**, pick the PDF on your computer and click **Open**. To look at a file already there, click its name in the field.
11. A PDF address (**Customer Signup Form PDF, Repair Authorization Form PDF, Damage Images PDF, Damage Images HTML**): a text box holding the PDF's web address, not a clickable link. Leave it. Open the PDF with the **Docs** button in RO Hub: **RO Hub** → the case (type the RO number in the box under **RO #:**, click **Search**) → **Docs** → the document ([Documents](#)).
12. 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.



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.

If no blue Save button appears. 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.

Tags, at the top of the left side

Tags are 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 (ask by Support ticket).

The 15 folders, top to bottom

Each folder below starts with how to open it.

A note on the dates pdrOS writes: erasing one changes nothing, with one exception. Erasing a sent date (for example **RTA or demand sent date**) lets you send that email again.

1. Contact

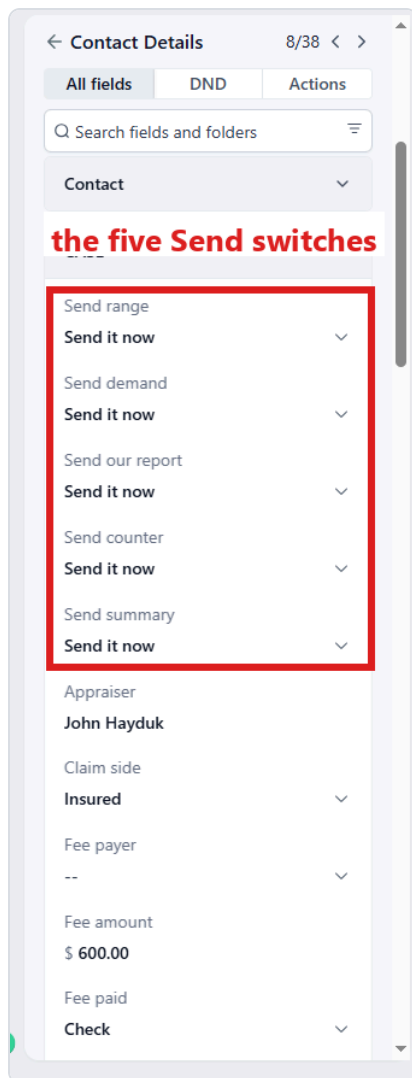
To open it: in the left menu, click **Contacts**. Click in the search box at the top of the list and type the customer's last name or RO number. Click the customer's name in the list. On the left side of the contact profile, click the folder **Contact**.

Field	What you do	What it is	Who fills it
RO# DO NOT EDIT THIS!!	Nothing. Never change it.	Your RO number (your case number). Tasks show it as "CASE #1007", texts to you as "case #1007", customers see "file #1007": all the same number. Every text, email and task carries it.	pdrOS
Customer Vehicle / Customer Signup Form	Text: click in the box and type.	The customer's vehicle: year, make, model.	The signup form
Customer Signup Notes	Text: click in the box and type.	The notes typed on the signup form, kept as the original. pdrOS copies them into Other Special Instructions (folder Estimates).	The signup form

This folder also holds the customer's name, phone and email (only the name also shows at the top of the left side). To change the phone or email: click in its box, delete the old one and type the new one (a phone with the area code). Then click the blue **Save** button at the bottom of the left side.

2. CASE (the one you use most)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name. The first field is **Case status**; right under it come the five Send switches: **Send range**, **Send demand**, **Send our report**, **Send counter**, **Send summary**.



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

Field	What you do	What it is	Who fills it
Case status	Text: leave it.	The one plain sentence for this stage: what Sarah says if the customer asks where things stand.	pdrOS
Send range ⚡	List: click the box under Send range and pick Send it now (or I sent it myself).	The first Send switch, right after Case status . Sends your range to the customer.	You
Send demand, Send our report, Send counter, Send summary ⚡	List: click the box under the switch and pick Send it now (or I sent it myself).	Four of the five Send switches. Each sends one email as you. See The Send switches .	You

Field	What you do	What it is	Who fills it
Appraiser	Nothing.	Your name as the appraiser, written at signup.	pdrOS
Claim side	List: click the box under Claim side and pick Insured or Claimant .	Insured when the customer's own insurer pays (every total loss); Claimant when the other driver's insurer pays.	The signup form; pdrOS sets Claimant when you take an inspection on
Fee payer	List: click the box under Fee payer and pick Owner or Shop .	Shop means no invoice to the customer and an "Invoice the shop" task for you. Never tell a customer or an insurer that the shop pays.	The signup form, or you
Fee amount	Money: click in the box and type the amount.	The fee, \$600 by default. A different amount means you invoice by hand (you get a task).	pdrOS, or you before signing
Fee paid ✂	List: click the box under Fee paid and pick No , Square , Venmo , Check , Cash or Waived .	How the fee was paid. Anything but No closes the case once there is an Outcome.	You (pdrOS writes Square when a Square invoice is paid)
Referring shop, Referring shop contact, Referring shop email	Text: click in the box and type.	The shop that sent the customer: its name, the person, the email. On a short pay the shop gets the upload email.	The signup form or the shop referral form, or you
How they found us	List: click the box under How they found us and pick Shop , Past customer , Google or Other .	How the customer found you.	The signup form
Agreement signed date	Date: leave it.	The day the customer signed.	pdrOS
Range low, Range high	Money: click in the box and type the amount.	Your range to the customer.	You
Carrier's offer	Money: click in the box and type the amount.	The insurer's first offer. Used in the range email and the settlement summary.	The signup form, or you
Intake consent	Leave it. It is checked only when the customer said yes on the signup form.	The box checked at signup: permission to text the customer.	The signup form

Field	What you do	What it is	Who fills it
Agreement type	List: leave it.	Which agreement wording the customer signed.	pdrOS
Carrier valuation report, Repair invoice, Shop estimate PDF, Carrier estimate PDF ✕	File: click Click to upload , pick the PDF, click Open .	The four document boxes. A file landing in any of them can complete the documents step.	The customer or the shop through the upload link; you can upload too
Referring shop phone	Phone: click in the box and type the number.	The referring shop's phone number.	You
RTA or demand PDF	File: click Click to upload , pick the PDF, click Open .	The RTA (insured) or demand letter (claimant) you made in RTAflow. Needed before Send demand.	You
Documents in date, Range sent date	Date: leave it.	Dates pdrOS writes when each thing happens.	pdrOS
Stage rank	Number: leave it.	A number pdrOS uses to know where the case is.	pdrOS

3. CARRIER & APPRAISER

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name.

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All fields DND Actions

Search fields and folders

CARRIER & APPRAISER

Other appraiser name
Riley Zztest

Other appraiser email
michaelbrand1001@gmail.com

Other appraiser phone
--

Adjuster name
Pat Zztest

Adjuster email
michael@bc3d.studio

RTA or demand sent date
Oct 3, 2026

Other appraiser contact date
Oct 3, 2026

Report sent date
Oct 3, 2026

Their report received date
--

My number
\$ 14,500.00

Their number
\$ 11,000.00

Picture: Folder CARRIER & APPRAISER open: Other appraiser name, Other appraiser email and Other appraiser contact date circled.

Field	What you do	What it is	Who fills it
Other appraiser name, Other appraiser email, Other appraiser phone	Text: click in the box and type.	Their appraiser. The email is needed before Send our report (on a claimant case the report goes to the adjuster instead, so Adjuster email is the one needed).	You
Adjuster name, Adjuster email	Text: click in the box and type.	The insurer's adjuster. The email must be valid before Send demand.	The signup form, or you

Field	What you do	What it is	Who fills it
RTA or demand sent date ✂	Date: click the box and pick the day.	Written by pdrOS when the demand goes. Typing it yourself, or choosing I sent it myself, starts Clock A (the seven to ten business days their appraiser has to make contact) on an insured case and the demand chase on a claimant case. On an inspection taken on against a shop it only moves the case to 3.1 and writes the note "Letter to the shop sent by John himself"; no chase, no text.	pdrOS, or you
Other appraiser contact date ✂	Date: click the box and pick the day.	The day their appraiser first made contact. Stops Clock A, texts the customer, gives you the task Their appraiser is in contact · send our report .	You
Report sent date ✂	Date: leave it.	Written by pdrOS when your report goes. Typed by hand, it starts Clock B (the wait for their report: two chase emails, then a task on day 22).	pdrOS
Their report received date	Date: leave it.	Written by pdrOS when their report lands in Supplement #1 Upload Doc Here (folder Supplements).	pdrOS
My number	Money: click in the box and type the amount.	Your valuation. Needed by Send counter.	You
Their number ✂	Money: click in the box and type the amount.	The other side's figure. Stops every chase and clock, texts you, gives you the Negotiate task.	You
Counteroffer	Money: click in the box and type the amount.	Your next figure, sent by Send counter.	You
Umpire ✂	List: click the box under Umpire and pick No, Called or Decided .	Called sends the customer a text and an email about the umpire step and gives you the Umpire task.	You
Umpire fee received	List: click the box and pick Received .	Pick it when the customer has paid your invoice for their half of the umpire's fee.	You

Field	What you do	What it is	Who fills it
Demand-by date ⚡	Date: click the box and pick the day.	A deadline you set. pdrOS texts you and makes a task 14 days before it, and texts you again 3 days before.	You
Statute deadline ⚡	Date: click the box and pick the day.	Two years from the date of loss on a diminished value or claimant inspection, set by pdrOS and told to the customer. Alerts 14 and 3 days before.	pdrOS, or you
Chase count	Number: leave it.	How many chase emails have gone on this case.	pdrOS
Tortfeasor letter sent date ⚡	Date: click the box and pick the day.	On a claimant case, the day you sent the pre-court letter. Moves the case to Pre-court.	You
Appraisal Document Upload Link	Nothing. To send it to this customer, see Your three links .	This customer's own upload link. Files sent through it land on their contact profile by themselves. Never send it to another customer.	pdrOS
Negotiation note	Text: click in the box and type one line.	Your one line of reasoning, sent with your counter by Send counter.	You
Counter sent date ⚡	Date: leave it.	Written by pdrOS when your counter goes. Typed by hand, it starts the 7-day silence clock.	pdrOS

4. OUTCOME

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **OUTCOME** and click the folder's name.

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All fields DND Actions

Q Search fields and folders

OUTCOME ^

Award signed date
📅 Oct 3, 2026

Award amount
\$ 14,045.00

Title fees
\$ 67.00

Recovery over offer
\$ 4,045.00

Settlement summary sent date
📅 Oct 3, 2026

Release signed date
--

Outcome
Settled v

Outcome recorded date
📅 Oct 3, 2026

Sales tax %
6

Sales tax amount
\$ 842.70

Net to customer
\$ 14,454.70

Picture: Folder OUTCOME open, its fields circled.

Field	What you do	What it is	Who fills it
Award signed date ⚡, Award amount ⚡	Date: click the box and pick the day. Money: click in the box and type the amount.	Both together settle the case: the customer gets the Settled text and email, you get the summary task.	You
Title fees	Money: click in the box and type the amount.	One of the five numbers the total loss summary needs.	You
Recovery over offer	Money: leave it.	Computed by pdrOS when the summary goes.	pdrOS
Settlement summary sent date	Date: leave it.	Written by pdrOS when the summary goes.	pdrOS

Field	What you do	What it is	Who fills it
Release signed date	Date: click the box and pick the day.	On a diminished value case, the day the carrier's release was signed. For your record only; nothing reads it.	You
Outcome ✕	List: click the box under Outcome and pick Settled, Counteroffer pending, Carrier review report received, Customer took the carrier's number, Court, Went quiet, Withdrawn or Report only .	How the case ended. Closes the case, or keeps it open: Counteroffer pending and Carrier review report received ask the customer every 30 days; Court waits for you. See Other endings .	pdrOS writes Settled; you pick the others
Outcome recorded date	Date: leave it.	When the case closed.	pdrOS
Sales tax %	Number: click in the box and type it.	One of the five numbers the total loss summary needs. Preset to 6.	You
Sales tax amount, Net to customer	Money: leave it.	Computed by pdrOS when the summary goes.	pdrOS

5. SHORT PAY & INSPECTION

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **SHORT PAY & INSPECTION** (right after **OUTCOME**) and click the folder's name.

Field	What you do	What it is	Who fills it
Shop estimate total, Carrier estimate total	Money: click in the box and type the amount.	The two totals on a short pay.	You or Sharon, optional (the short pay tasks print it)
Rewritten estimate total	Money: click in the box and type the amount.	The total of the rewrite on a short pay.	You (a record)
Variance	Money: click in the box and type the amount.	The gap between the shop's total and the carrier's total.	You or Sharon (a record)
Inspection location	List: click the box and pick Our office or Travel .	Travel adds the travel fee and skips the booking link.	The signup form
Travel fee	Money: leave it.	\$600 on a travel inspection.	pdrOS

Field	What you do	What it is	Who fills it
Engaged against ✕	List: click the box under Engaged against and pick None, Shop or Carrier .	After an inspection report: None (report only, the case closes after the fee), Shop or Carrier (you take it on).	You

Other words for this: folder = section of the left side, the left column; field = box; Send switch = the dropdown; RO number = RO#, case number, the "file #" customers see; contact profile = the customer's screen; their appraiser = the other appraiser, the other side's appraiser.

6. Estimates

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **Estimates** and click the folder's name.

Field	What you do	What it is	Who fills it
Upload Estimate Doc Here ✕	File: click Click to upload , pick the PDF on your computer, click Open .	Your report (total loss, diminished value, inspection) or your rewrite (short pay). Uploading it moves the case and starts the next step. A second upload replaces the file and only leaves a note.	You
Upload Insurance Approved Estimate PDF	File: click Click to upload , pick the PDF on your computer, click Open .	The signed award, when the Negotiate task asks for it. Nothing reads it; it is your record.	You
Other Special Instructions	Text: click in the box and type.	The signup notes, copied here by pdrOS, and what a shop wrote on its referral.	pdrOS

7. Supplements

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **Supplements** and click the folder's name.

Field	What you do	What it is	Who fills it
Supplement #1 Upload Doc Here ✕	File: click Click to upload , pick the PDF on your computer, click Open .	The other appraiser's report. Uploading it stops every chase and gives you the Negotiate task.	You

8. Insurance Info

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **Insurance Info** and click the folder's name.

Field	What you do	What it is	Who fills it
Insurance Company	Text: click in the box and type the name.	The insurer on the claim. Printed in the range email, the demand and the stage sentences.	The signup form, or you
Deductible	Money: click in the box and type the amount (numbers only, no dollar sign).	One of the five numbers the total loss summary needs.	You
Claim #	Text: click in the box and type the number.	The insurer's claim number. Needed before Send demand, Send our report and Send counter.	The signup form, or you

9. FORM | Repair Authorization

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **FORM | Repair Authorization** and click the folder's name.

Field	What you do	What it is	Who fills it
Repair Authorization Form PDF	Nothing (a text box with the web address). To open the PDF: RO Hub → the case (type the RO number in the box under RO #: , click Search) → Docs → Repair Authorization Form .	The signed agreement as a PDF, made when the customer signs.	pdrOS
VIN	Text: click in the box and type.	The vehicle's VIN, typed by the customer when they sign.	The customer, on the agreement
Date of Loss ✕	Date: click the box under Date of Loss and pick the day.	The accident date. On a diminished value case, and on an inspection with Claim side Claimant, pdrOS sets the statute deadline from it (two years) and tells the customer. Needed before Send demand.	The signup form, or you

10. REPAIR STATUS

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **REPAIR STATUS** and click the folder's name.

Field	What you do	What it is	Who fills it
RO Type ✂	List: click the box under RO Type and pick total loss claim, diminished value, short pay or post-repair inspection .	The kind of case. Changing it re-sends that type's first request and swaps the agreement link. See Wrong type . The list has twelve choices. The other eight (hail, collision and so on) are body shop jobs; picking one stops the appraisal path.	The signup form (Repair Order Type); you, only to correct a mistake

11. FORM LINKS

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **FORM LINKS** and click the folder's name.

Field	What you do	What it is	Who fills it
REPAIR AUTHORIZATION LINK	Nothing. Leave it as it is.	This customer's own agreement link: the page where they sign. pdrOS swaps it when the type changes. Never send it to another customer.	pdrOS

12. General Info

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **General Info** and click the folder's name.

It holds the customer's mailing address: street, city, state and postal code. Nothing in it starts work. To change the address: click in a box, delete the old value and type the new one. Then click the blue **Save** button at the bottom of the left side.

13. Pics To Email PDF

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **Pics To Email PDF** and click the folder's name.

Field	What you do	What it is	Who fills it
Damage Images PDF	Nothing (a text box with the web address). To open the PDF: RO Hub → the case (type the RO number in the box under RO #: , click Search) → Docs → Scope Sheet Images (PDF) .	The same photo report as a PDF. On an inspection, photos here give you the "Write the inspection report" task.	pdrOS

14. Pics To Email HTML

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **Pics To Email HTML** and click the folder's name.

Field	What you do	What it is	Who fills it
Damage Images HTML	Nothing (a text box with the web address). To see the photo report: RO Hub → the case (type the RO number in the box under RO #: , click Search) → Docs → Scope Sheet Images (HTML) .	The photo report as a web page, built when the customer sends photos through the upload link.	pdrOS

15. FORM | Customer Signup

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **FORM | Customer Signup** and click the folder's name.

Field	What you do	What it is	Who fills it
Customer Signup Form PDF	Nothing (a text box with the web address). To open the PDF: RO Hub → the case (type the RO number in the box under RO #: , click Search) → Docs → Customer Signup Form .	The signup sheet as a PDF, made within a minute of the signup.	pdrOS

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

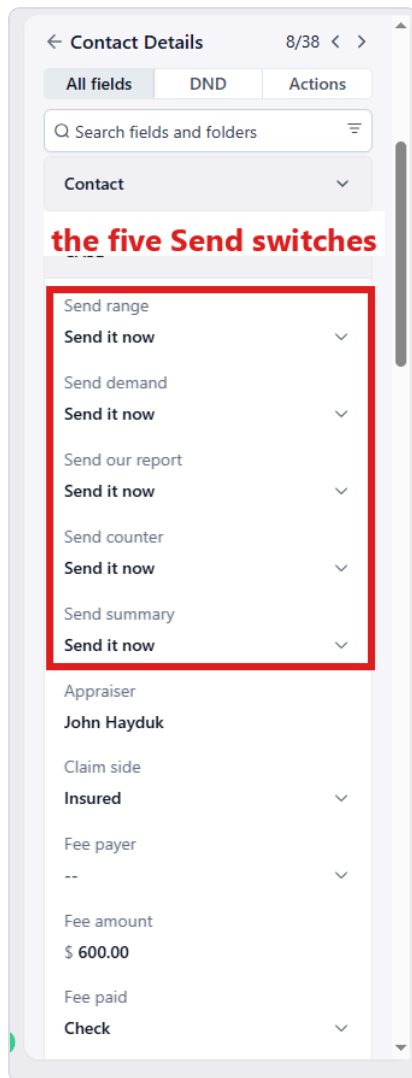
Set a switch, step by step

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

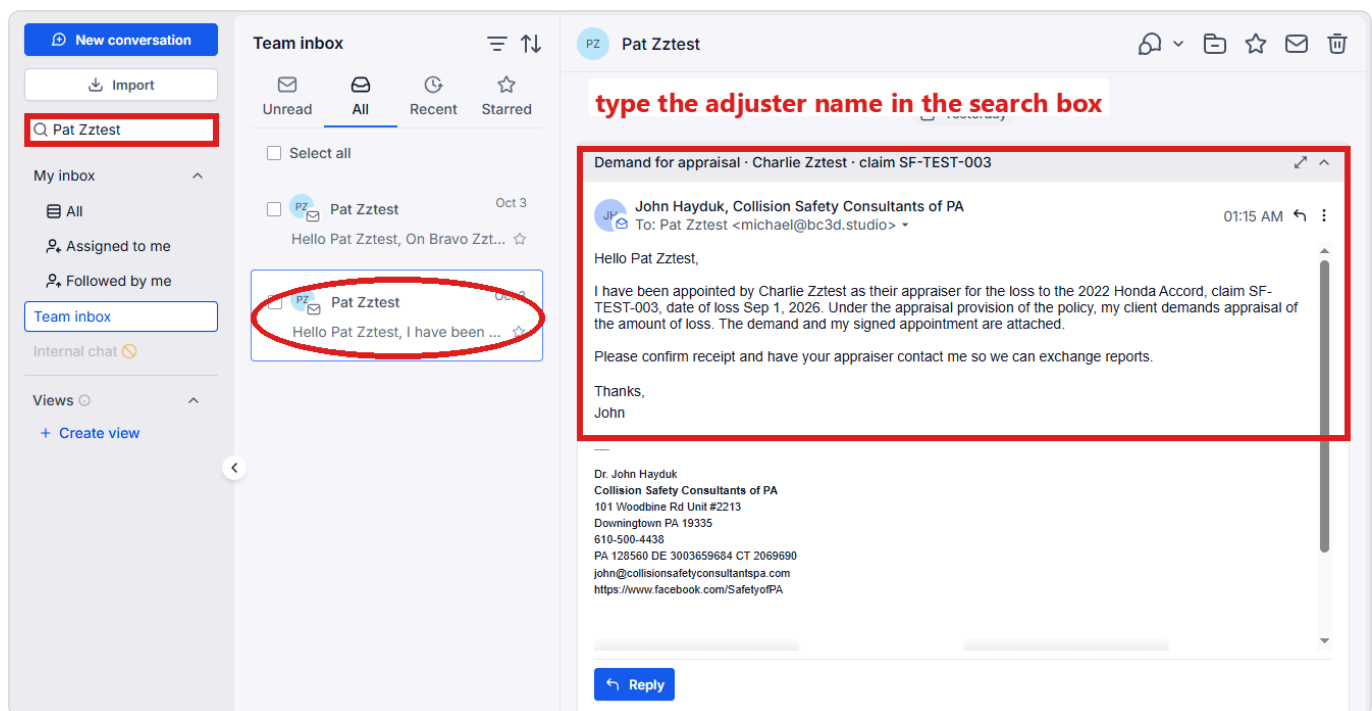
Switches do nothing on a closed case. Five minutes later you get the "It did not go" text so you know it was ignored.

After a send

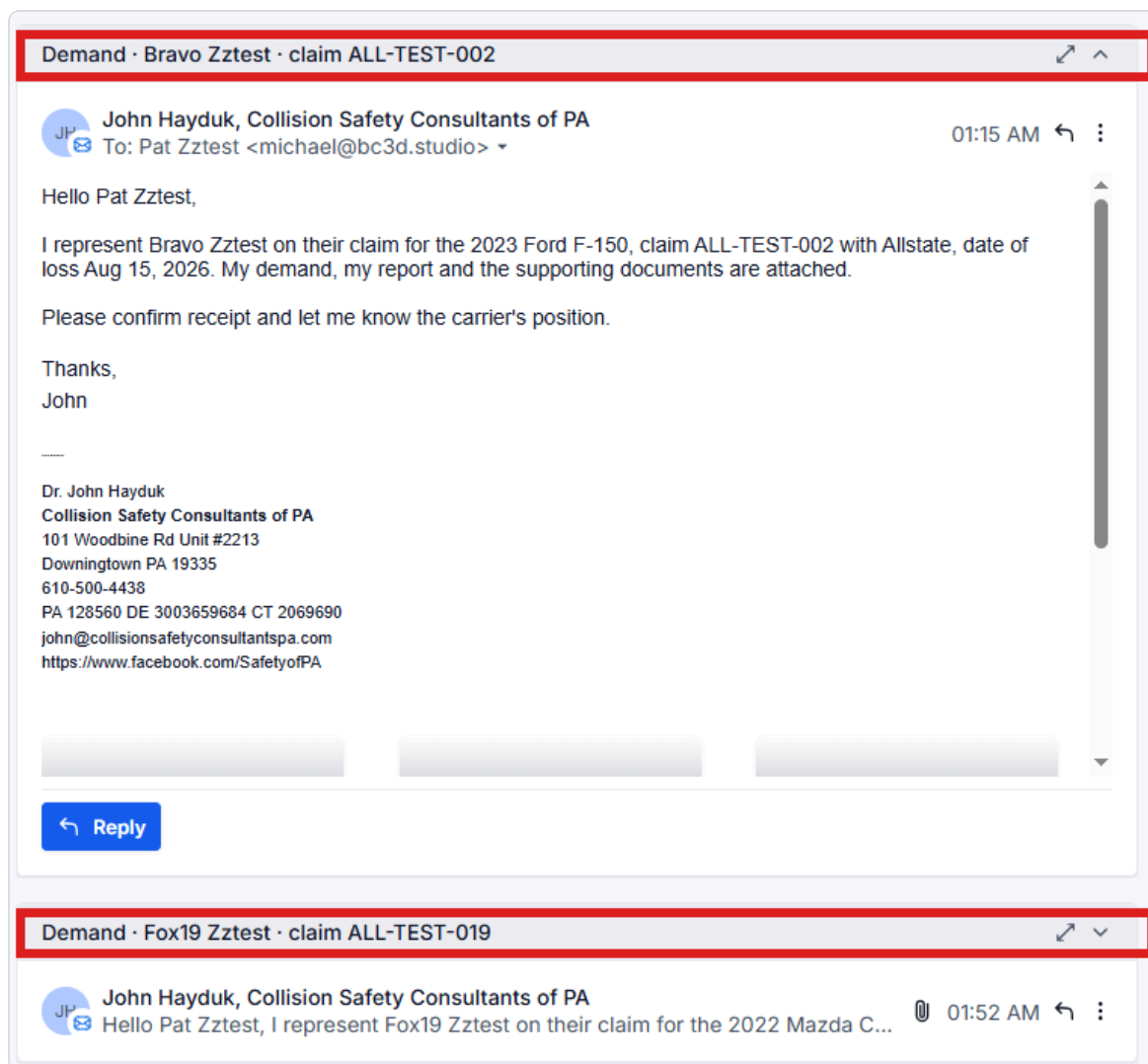
The email that went is in the adjuster's or the other appraiser's own conversation, under their name, not in the customer's thread. That is the copy of record, and their reply will land there. To read it:

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 customer's thread: every text and email with the customer

Answers: where are the customer's texts and emails? how do I send a customer a text or an email? which messages did Sarah send? what is the Conversations page?

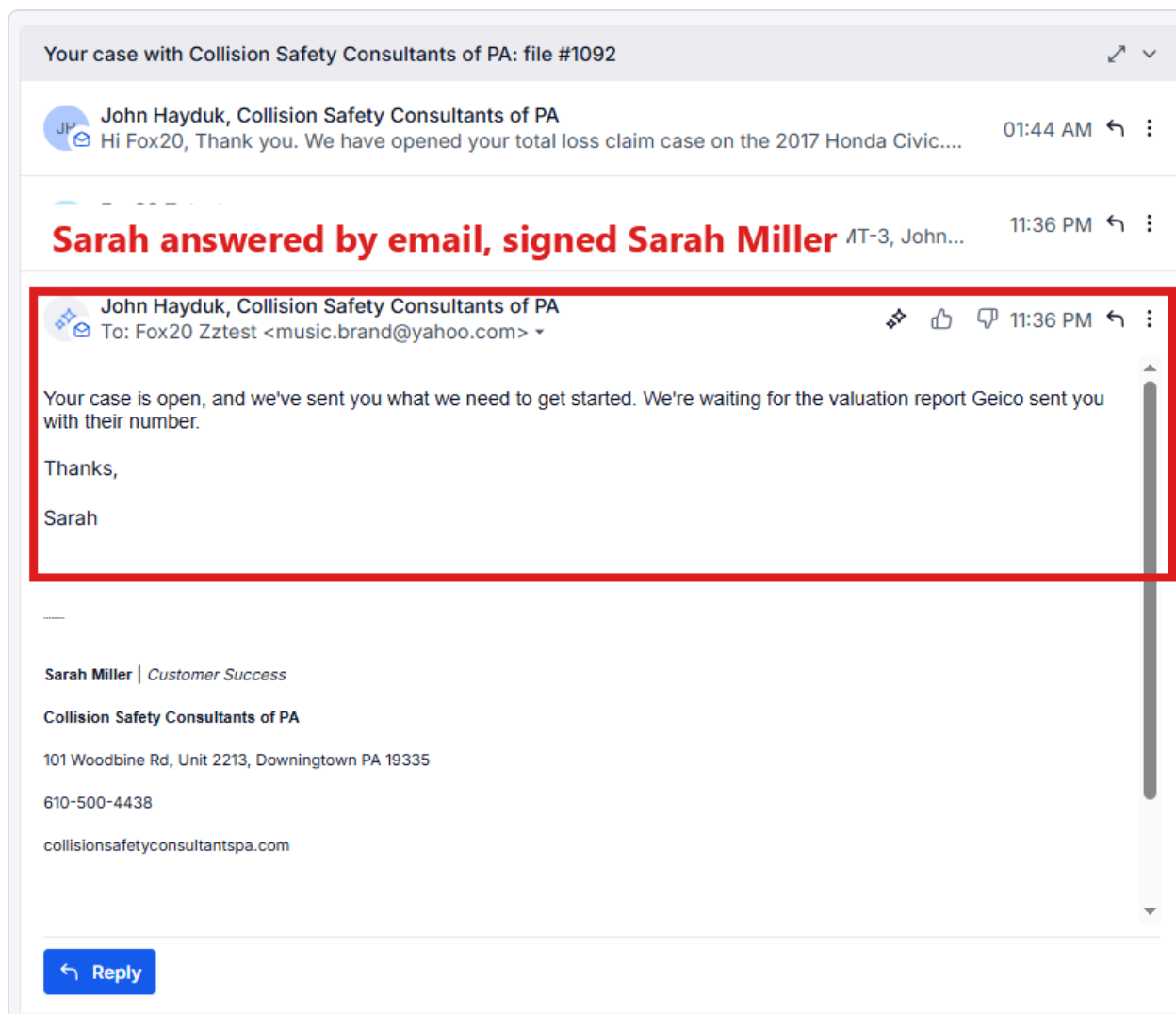
The middle of the contact profile is the customer's thread. It holds every text and email they received or sent, in order, including what pdrOS and Sarah sent for you. **Conversations** in the left menu is the page that lists every thread. The customer's thread there is this same thread, reached another way.

Open the thread

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.

The oldest message is at the top, the newest at the bottom, just above the message box. Notes appear here too, mixed in with the texts and emails in time order.



Picture: A customer's thread: an email Sarah answered, signed Sarah Miller, circled.

Reading it

- Gray bubbles on the left are the customer. Bubbles on the right are from your office.
- A message with a small sparkle mark on the sender's picture, and a thumbs up and thumbs down next to its time, was written by Sarah. Her emails are signed Sarah Miller.
- Texts and emails share one thread. Click an email to open it in full.
- When Sarah hands a customer to you, she goes quiet on them for eight hours and your phone gets a text ("Sarah handed NAME to you").

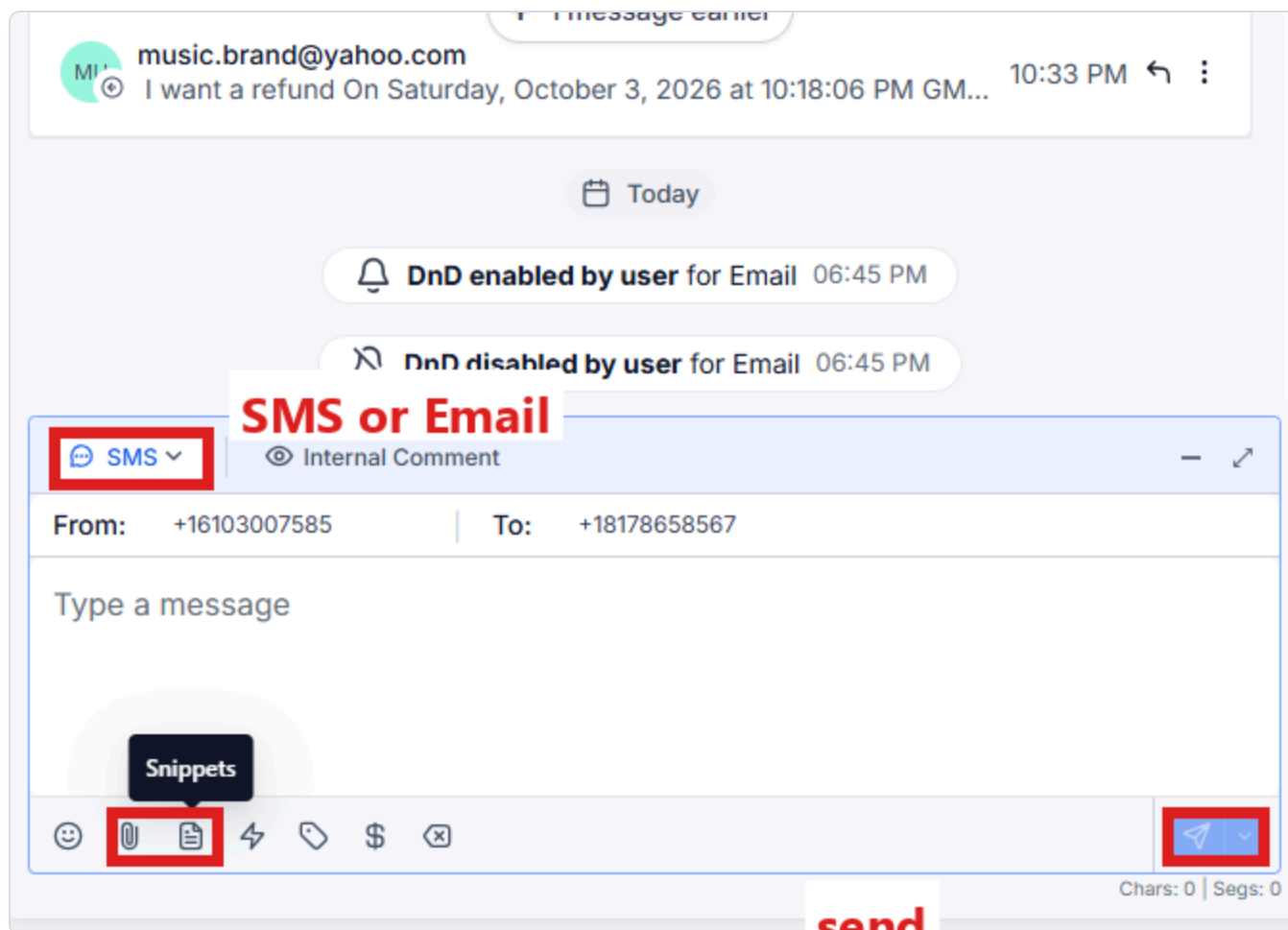
Sending your own text

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.

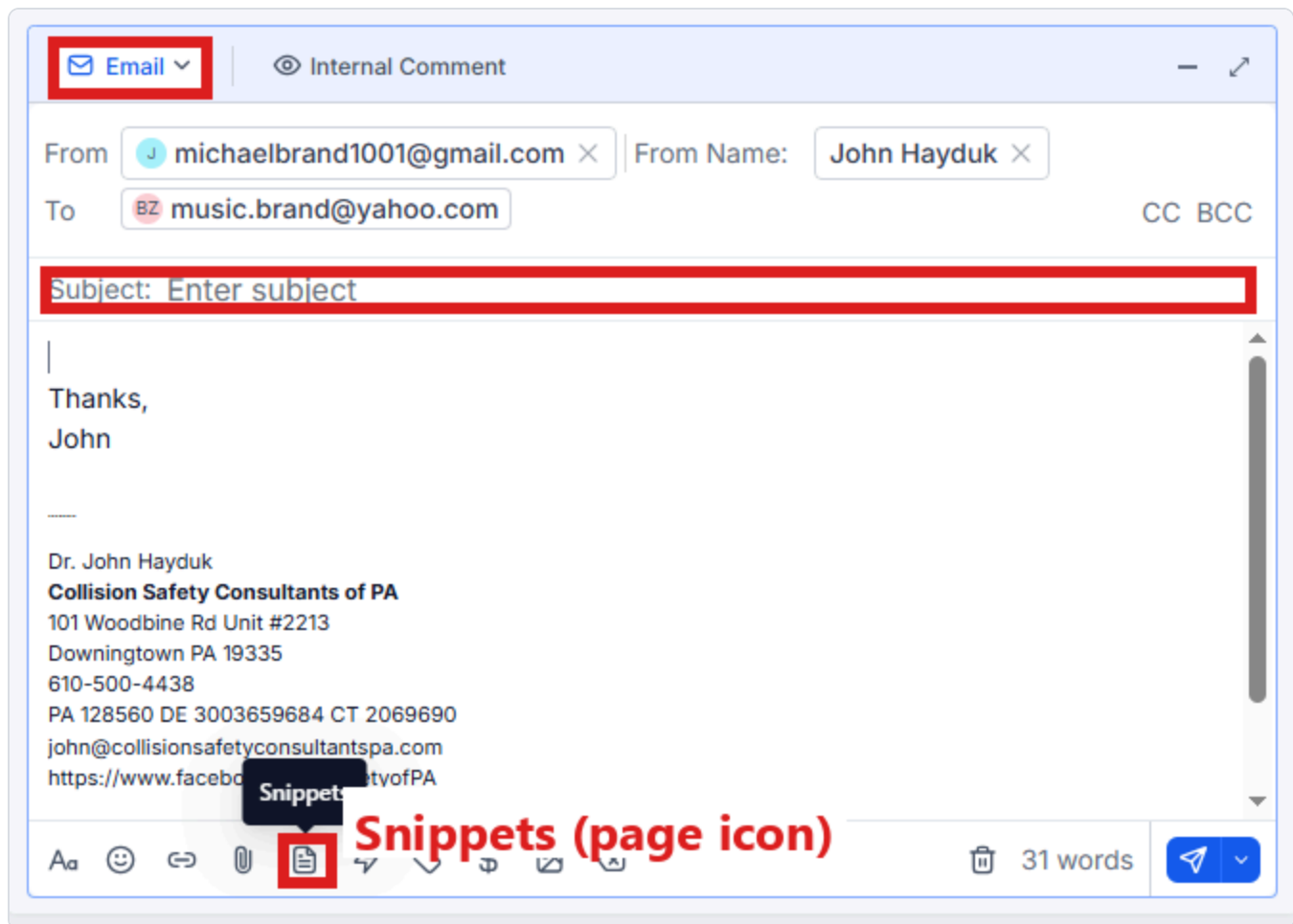
3. Click the customer's name in the list. Their contact profile opens.

You are in the right place when you see the customer's name at the top left and their texts in the middle. 4. At the bottom of the middle of the contact profile is the message box. At its left end, click the small button with a down arrow. 5. Pick **SMS**. 6. Click in the box and type your text. Keep it under 320 characters. 7. Click the paper-plane button at the right end of the box. The text goes.

A link always goes in a text of its own; a link mixed with words breaks on the phone.



Picture: The message box at the bottom of the middle: the button with the down arrow (SMS or Email), the Snippets icon, the paperclip and the paper-plane send button.



Picture: The email window: Email picked at the top left, the Subject line, and the Snippets icon (a page) at the bottom.

Sending your own email

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. At the bottom of the middle of the contact profile is the message box. At its left end, click the small button with a down arrow.
5. Pick **Email**. The box grows to show the subject line.
6. Click in the subject line and type a subject.
7. Click in the box and type your email (or use saved wording: see Snippets, below).
8. To attach a file, click the paperclip icon and pick the file on your computer (your report, a photo).
9. Click the paper-plane button at the right end of the box. The customer's reply lands back in this same thread.

A PDF that lives on the contact profile (the signed agreement, the photo report) has to be on your computer before you can attach it. Open it first with the **Docs** button in RO Hub ([Documents](#) shows how). In the new browser tab, click the download button (a down arrow at the top of the PDF).

What is not here

Emails to the adjuster, the other appraiser or the shop are **not** in the customer's thread. pdrOS keeps a separate conversation for each of those people, under their own name. Their replies never mix with the customer's, and Sarah can never answer them. You find them on the **Conversations** page, below. See [Your own messages](#).

The Conversations page

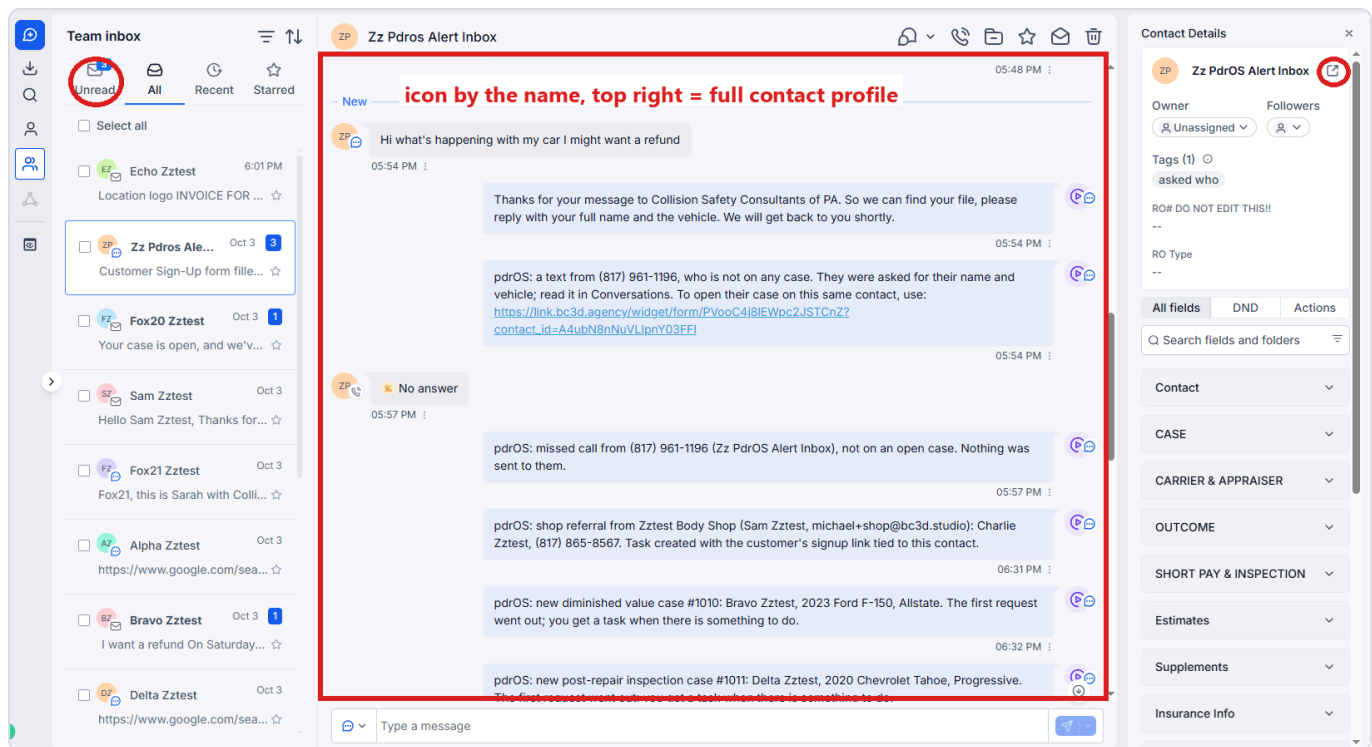
Conversations in the left menu lists every thread in one inbox: customers, and separately the adjusters, appraisers and shops.

1. In the left menu, click **Conversations**.
2. On the left is the list of people. Click **Unread** at the top of the list to see new messages.
3. Click a person's name. Their thread opens in the middle, and their details on the right.

You are in the right place when the person's name is at the top of the right column and their messages are in the middle.

You can reply right here. The message box at the bottom of the middle works the same way as on the contact profile.

To open the customer's full contact profile from here, look at the top of the right column (headed **Contact Details**). Click the small square-with-an-arrow icon next to the person's name.



Picture: Conversations: Unread at the top of the list, a thread in the middle, and the small square-with-an-arrow icon next to the name in the right column circled. It opens the contact profile.

Snippets (saved wording)

The texts and emails pdrOS sends by itself are not snippets you need to touch. For your own messages, the **Snippets** icon in the message box holds the wording we saved for you. Ask us to add any you send often.

To use one, follow "Sending your own text" or "Sending your own email" above. When you reach the step where you type:

1. Click the **Snippets** icon in the message box (hold the mouse over the small icons to find it).
2. Pick the snippet.
3. Change anything that needs changing.
4. Click the paper-plane button at the right end of the box.

Notes, Tasks and Appointments: the right edge of the contact profile

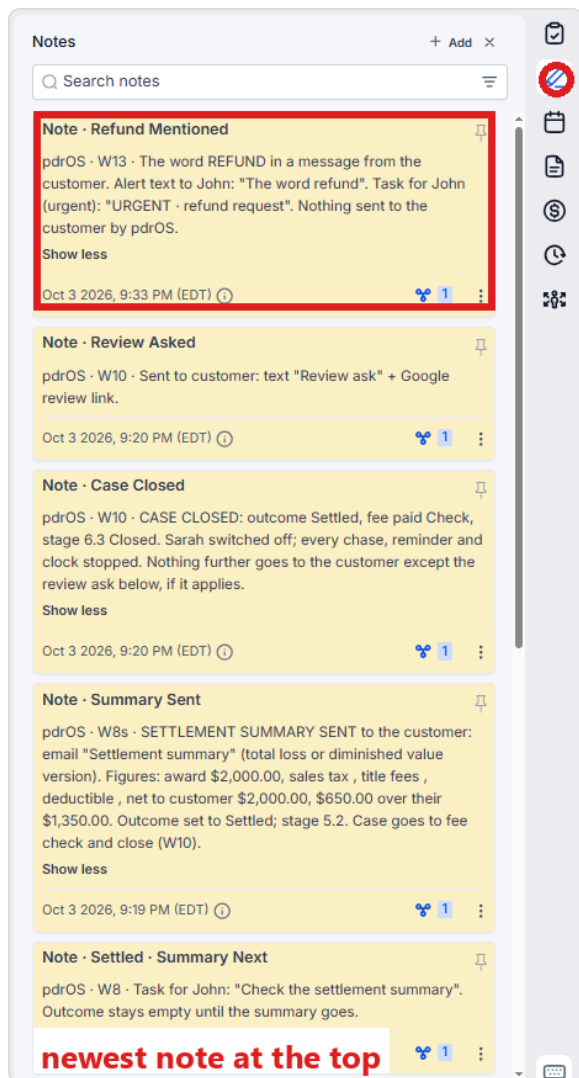
Answers: how do I see what pdrOS did on a case? where do I add, change or reassign a task? where do I book, move or cancel an appointment?

A narrow column of small icons runs down the far right edge of every contact profile. Three of them matter most. **Notes** is the case's timeline. **Tasks** is where you add or change a task. **Appointments** is the only place to book an inspection. Hold the mouse over an icon to see its name; click it and its panel opens beside it.

Notes: the timeline

Every time pdrOS does something on a case it writes a note, newest at the top, with the time. "Case OPENED", "Range SENT", "Demand SENT to Pat Smith (the adjuster)", "Their figure in", "Settled", "CASE CLOSED".

Use it two ways: - **After you do something**: wait up to two minutes, read the top note. It tells you what pdrOS sent, to whom, with what attached, and what happens next. - **When a customer calls**: read down the notes and you have the whole history in order, without opening anything else.



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

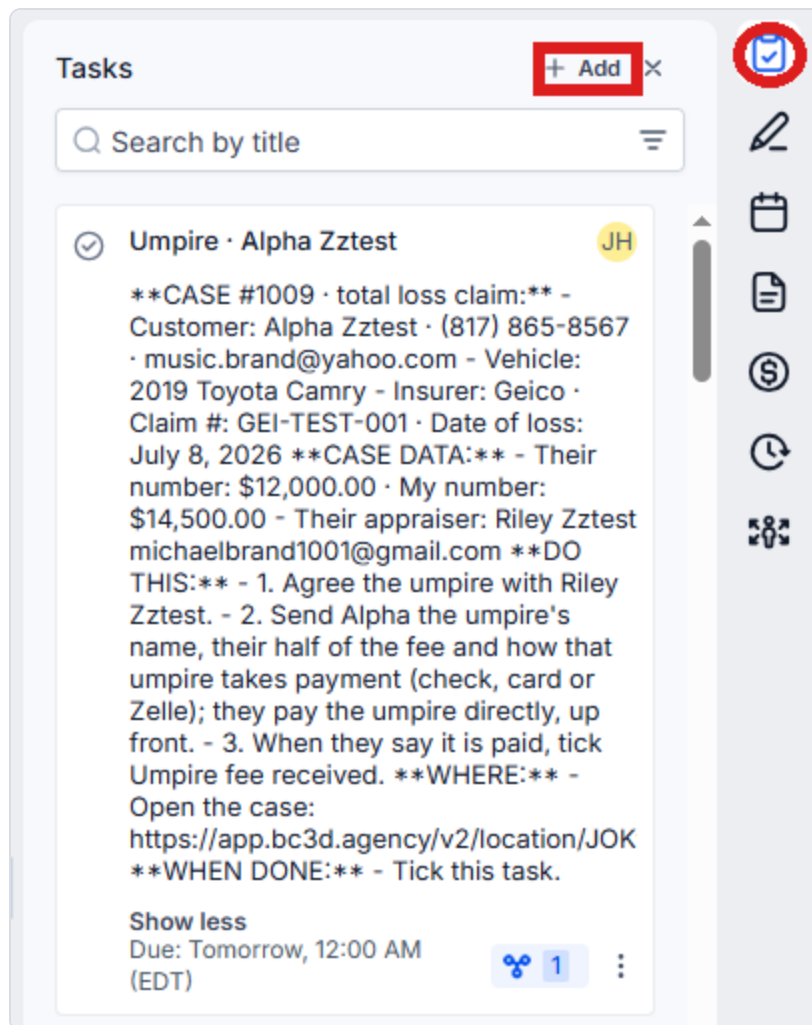
To read the notes, or add your own:

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 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. To add your own note, click **+ Add** at the top of the notes.
6. Type a title and the note.
7. Click **Save** under the note you typed. (The blue Save button at the bottom of the left side is only for fields.)

A note you write does nothing; it just stays in the notes. Notes also appear in the middle of the contact profile, mixed in with the texts and emails, in time order.

Tasks: add, change, reassign

The tasks pdrOS creates for you also appear here, plainer than on the Tasks page.



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

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.

To add a task of your own:

1. Click + **Add**.
2. Type the **Title**.
3. Pick the **Due Date and Time**.
4. Pick the **Assignee** (you or Sharon).
5. Click **Save** at the bottom of the task panel.

To change a task's date or title, or give it to Sharon or to yourself:

1. Click the task's title.
2. Change the date, the title or the **Assignee**.
3. Click **Save** at the bottom of the task panel.

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

The Tasks page is also the easier place to read a task, with its links clickable.

Appointments: the only place to book

Book appointment

Calendar

Inspections Calendar

Appointment title

{{contact.name}}

Add description

Team member

Calendar Default

Date & time

Showing slots in this timezone: (Account timezone)

GMT-04:00 US/Eastern (EDT)

Default Custom

Date

Mon, Oct 5th, 2026

Slot

9:00 AM - 10:00 AM

Meeting location

☒ Calendar default ☐ Custom

Status : ☒ Confirmed

Cancel

Book appointment

Attendees

1

Contact

Fox20 Zztest

Oct 5, 9:00 AM - 10:00 AM

Contact's local time (US/Eastern)

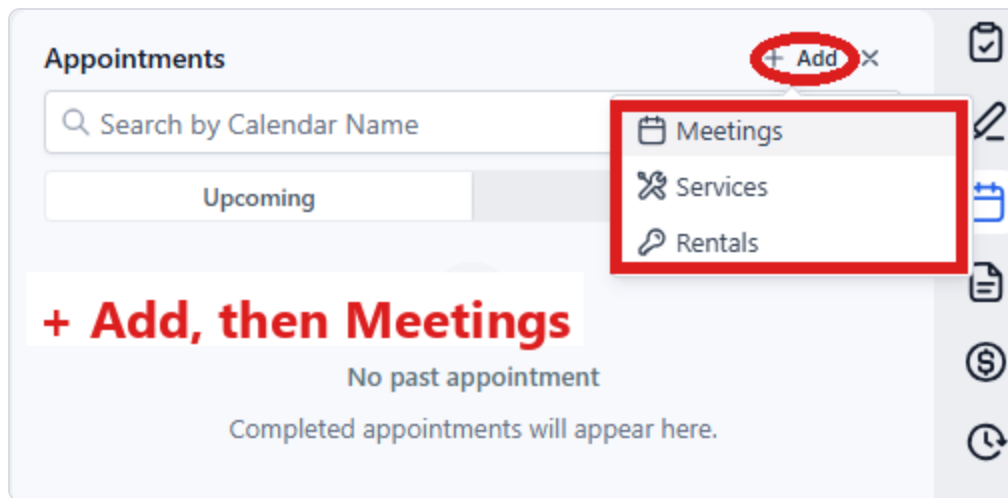
Internal notes

+ Add internal note

1 Calendar 2 Date and Slot

3 blue Book appointment

Picture: The Book appointment window: Calendar set to Inspections Calendar, Date and Slot, and the blue Book appointment button circled.



Picture: The Appointments icon (a calendar) on the right edge circled, and the + Add menu with Meetings circled.

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 **Appointments** icon (a calendar). You are in the right place when the panel's title reads **Appointments**.

To book:

1. Click + **Add** at the top of the panel. A small menu opens; click **Meetings**. The **Book appointment** window opens.
2. Under **Calendar**, make sure it reads **Inspections Calendar** (if not, click the box and pick it).
3. Under **Date & time**, click the box under **Date** and pick the day, then the box under **Slot** and pick a free time.
4. Click the blue **Book appointment** button at the bottom right.

Within a minute the customer gets the confirmation text and email, and the case moves to **Inspection booked**.

To move a time:

1. Click the three dots at the right of the appointment and pick **Edit**. The **Edit details** panel opens.
2. Under **Date & time**, click **Date** and pick the new day, then click **Slot** and pick the new time.
3. Click **Save** at the bottom right of the panel.

The customer gets a fresh confirmation with the new time.

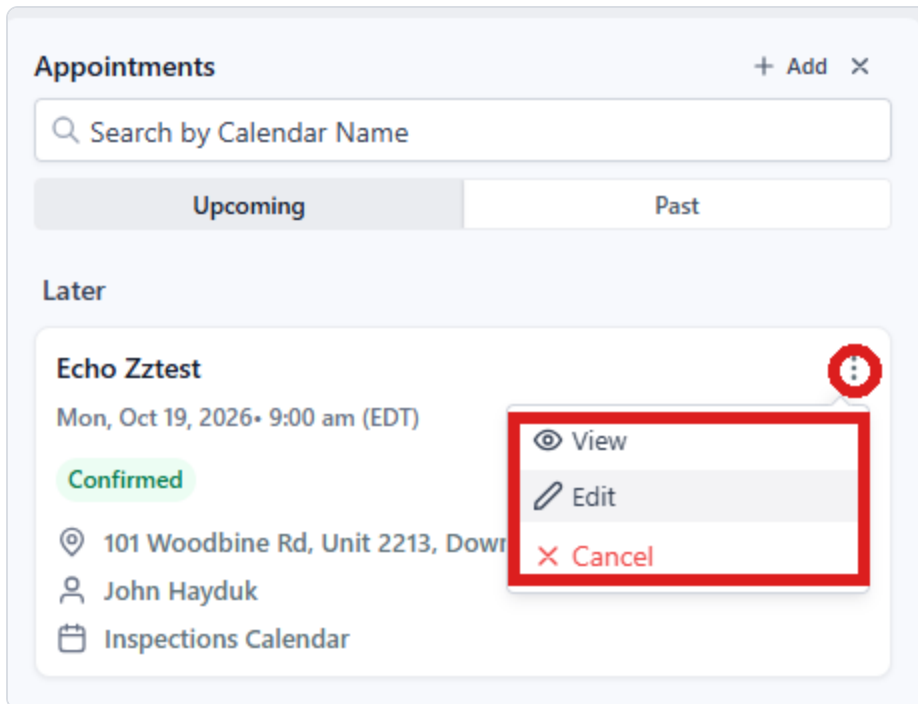
To cancel, or to mark a no show:

1. To cancel: click the three dots at the right of the appointment and pick **Cancel**.

To mark a no show instead:

1. Click the three dots at the right of the appointment and pick **Edit**. The **Edit details** panel opens.
2. At the bottom of the panel, click the box next to **Status** and pick **No show**.
3. Click **Save** at the bottom right.

The customer gets a rebook text with the booking link, and you get a text.



Picture: An appointment card on the right edge: its three dots open with View, Edit and Cancel.

Edit details

Appointment title

Echo Zztest

Calendar

Inspections Calendar

Calendar type:

8-8 Personal booking ⓘ

Team member

John Hayduk

Date & time

Showing slots in this timezone: (Account timezone)

GMT-04:00 US/Eastern (EDT)

☐ Also update Contact timezone to US/Eastern ⓘ

Default

Custom

Date

Slot

Mon, Oct 19th, 2026

9:00 AM – 10:00 AM

Date and Slot

Meeting location

☒ Calendar default
As confirmed in the calendar

☐ Custom
Set specific to this appointment

☒ Confirmed

☐ Canceled

☐ Showed

☐ No show

☐ Invalid

Status

Status :

☒ Confirmed

Cancel

Save

Picture: The appointment's Edit details panel: Date and Slot, and the Status box at the bottom, circled.

The same panel lists the customer's appointments, so you can see the history.

Never book by typing a new name into the Calendars page (left menu **Calendars**). That makes a second contact profile with no case, and you get an alert saying so. Book from the customer's contact profile.

pdrOS for Collision Safety Consultants of PA

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Documents: where every PDF lands

Answers: where is the signed agreement? where is the PDF the customer uploaded? where are the photos? how do I open a PDF? what are the Docs button, Forms / Pics and the Documents icon?

One window opens a case's PDFs: the **Docs** button in RO Hub. It lists only what this case has: the signed agreement, the signup sheet, your report, their report, the photo report, the files the customer uploaded and your RTA. Click a row and it opens. The uploaded files also sit in upload fields on the contact profile; click the file's name there and it opens too, which is handy when you are already on the contact profile.

One thing to know: on the contact profile, a field that holds a PDF's web address (for example **Repair Authorization Form PDF**) is a text box, not a clickable link. Clicking it does nothing useful. Uploaded files are different: their names are clickable.

Open a PDF: the Docs button in RO Hub

1. In the left menu, click **RO Hub**. The **Repair Order** tab opens.
2. Click in the box under **RO #:** at the top (it reads Enter repair order number), type the RO number and click **Search**. The case loads.
3. Click the small **Docs** button, to the right of the **Contacts** button. A small window titled **RO Documents** opens, with a count at the top (for example "7 documents available"). It shows only documents this case has, in groups with a count each: **FORMS & REPORTS**, **SCANS & ESTIMATES**, **SUPPLEMENT ESTIMATES**, **APPRAISAL CASE** and **PHOTO SETS**.
4. Click a row. The document opens in a new browser tab.

The screenshot shows the RO Hub interface with a case loaded. The top navigation bar includes fields for RO # (1010) and Customer (Zztest, Bravo), along with Search, Contacts, Docs (circled in red), and Chats buttons. The main content area is divided into a left sidebar with tabs for Repair Order and RO List, and a central area with a form. The RO Documents window is open, displaying 7 documents available, categorized into FORMS & REPORTS (2), SCANS & ESTIMATES (1), APPRAISAL CASE (2), and PHOTO SETS (2). The Docs button is highlighted with a red circle and the text "Docs button, next to Contacts".

Picture: RO Hub with a case loaded on the Repair Order tab: the Docs button at the top right circled, the documents window open beside it.

You are in the right place when the window's title reads **RO Documents**. The window uses the shop's names for some of your files:

In the Docs window	What it is in your case
Repair Authorization Form	The signed agreement
Customer Signup Form	The signup PDF
Shop Estimate	Your report (the file in Upload Estimate Doc Here)
Supplement #1 Estimate (under SUPPLEMENT ESTIMATES)	Their report
Scope Sheet Images (PDF) and (HTML)	The customer's photo report
Carrier Valuation Report, Repair Invoice, Shop Estimate PDF, Carrier Estimate PDF (under Appraisal Case)	What the customer or the shop uploaded
RTA or Demand PDF (under Appraisal Case)	Your RTA or demand

What each PDF is

Three PDFs pdrOS makes for you (your report and their report are in Docs too, as **Shop Estimate** and **Supplement #1 Estimate**):

- **The signup sheet** (Docs: **Customer Signup Form**; its address is also in **Customer Signup Form PDF**, folder **FORM | Customer Signup**): made within a minute of the signup. It shows the appraisal fields (type, RO number, vehicle, insurer, claim side, date of loss, carrier's offer, consent) with your logo.
- **The signed agreement** (Docs: **Repair Authorization Form**; its address is also in **Repair Authorization Form PDF**, folder **FORM | Repair Authorization**): made when the customer signs. It has the wording for that case type, the VIN and vehicle, and their signature.
- **The photo report** (Docs: **Scope Sheet Images (PDF) and (HTML)**; its address is also in **Damage Images PDF**, folder **Pics To Email PDF**, and as a web page in **Damage Images HTML**, folder **Pics To Email HTML**): built from the customer's phone photos.

What the customer or shop uploads

The customer sends files through the upload link pdrOS texts them. The files land in four upload fields in folder **CASE: Carrier valuation report, Repair invoice, Shop estimate PDF and Carrier estimate PDF**. To open one: the **Docs** button (above, under **Appraisal Case**), or, when you are already on the contact profile, open folder **CASE** and click the file's name in the field. A file in the "wrong" box still counts on a total loss.

The customer's photos go into the photo report (above).

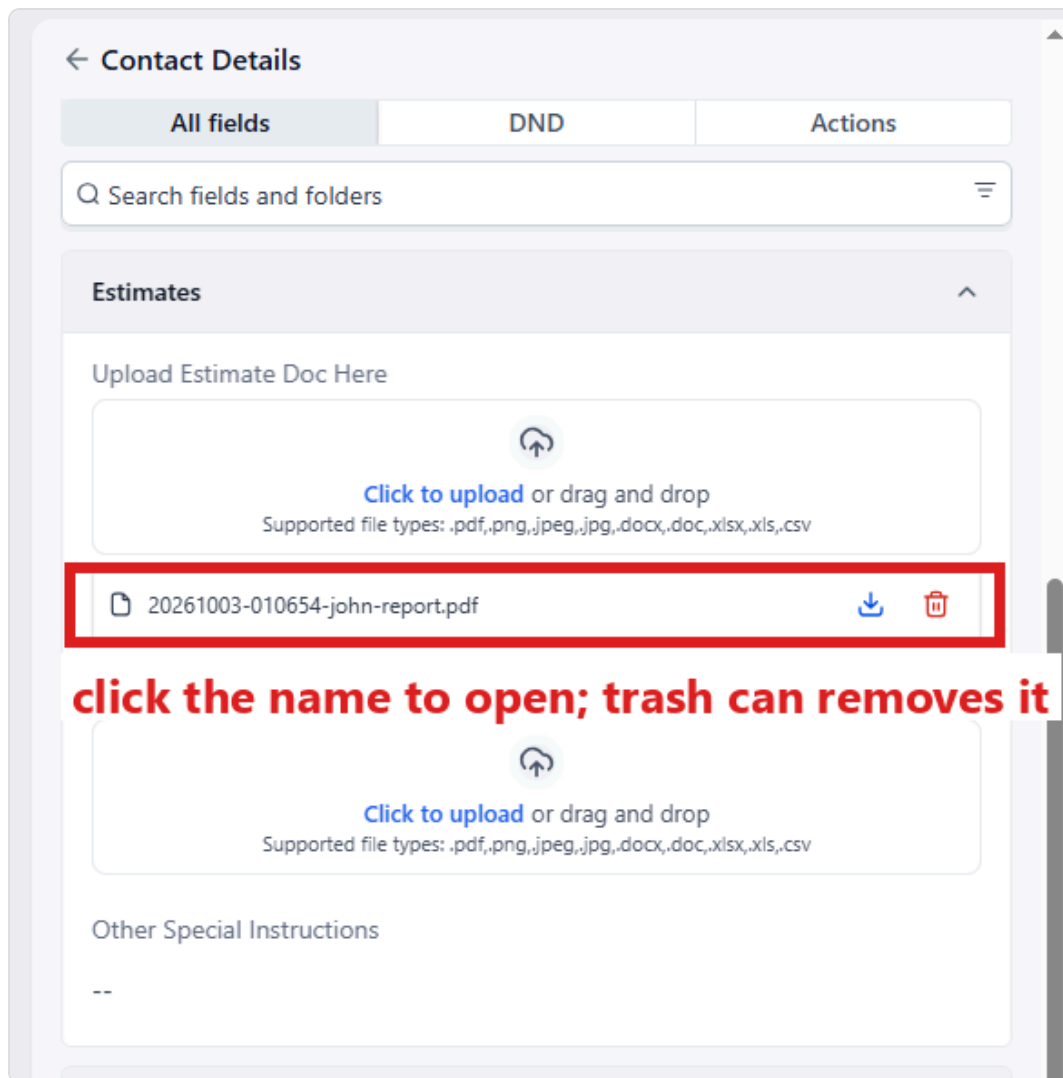
What you upload

- Your report or rewrite: **Upload Estimate Doc Here** ⌵ (folder **Estimates**).
- The RTA or demand: **RTA or demand PDF** (folder **CASE**).
- Their report: **Supplement #1 Upload Doc Here** ⌵ (folder **Supplements**).

To upload:

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 named in the list above (**Estimates**, **CASE** or **Supplements**) and click the folder's name to open it.
5. In the field from the list, click **Click to upload**, pick the PDF on your computer and click **Open**.
6. Click the blue **Save** button at the bottom of the left side.
7. On the far right edge of the contact profile, click the **Notes** icon (a pen). Within two minutes, the newest note at the top tells you what pdrOS did with the file.

To open a file you or the customer uploaded: same route to the folder, then click the file's name in the field.



Picture: Folder Estimates open: the uploaded report's file name in Upload Estimate Doc Here circled.

Forms / Pics: another way to the same three PDFs

If the Docs window is ever empty or slow, the signed agreement, the signup sheet and the photo report are also here:

1. In the left menu, click **Forms / Pics**.
2. 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**.
3. Click the tab you need:
4. **Filled Forms** for the signed agreement (the card **Repair Authorization Form PDF**, the first card) and the signup sheet (the card **Customer Signup Form PDF**, further down the list);
5. **Photo Sets PDF** for the customer's photo report (the card **Scope Sheet Images**).

6. On the card, click **Open PDF** (the cards further down are for repair shops; ignore them). The PDF opens in a new browser tab. (**Print/Download** saves it to your computer; **Copy Link** copies its web address.)

You are in the right place when the customer's name shows at the top and you see the tabs **Status**, **Blank forms**, **Filled Forms** and **Photo Sets PDF**.

RO#: 1010 Search Customer: Zztest, Bravo

Forms

RO# box + Search; Filled Forms; first card Repair Authorization Form PDF; Open PDF

Status Blank forms Filled Forms Photo Sets PDF Raw Photos

Completed Forms for Bravo Zztest RO# 1010 2 of 9 completed forms available

About Filled Forms

These are completed forms with all customer information filled in. Use these PDFs for:

- Printing official records
- Emailing to customers
- Downloading for archives
- Insurance submissions
- Sharing with team members
- Customer documentation

All forms are automatically generated when customers complete them.

Search forms... Copy All PDF Links

1 Repair Authorization Form PDF Available

<https://cmnqwtgacjoajytdnzbtsupabase.co/storage/v...>

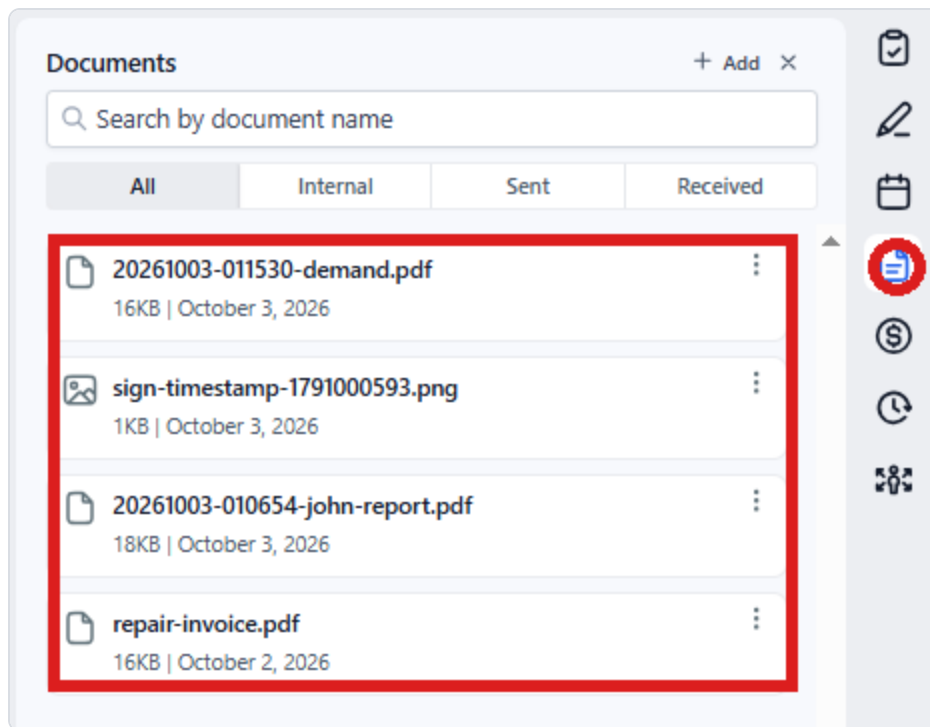
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Picture: Forms / Pics: the RO # box and Search at the top left, the tabs (Status, Blank forms, Filled Forms, Photo Sets PDF, Raw Photos) circled, and the first card, Repair Authorization Form PDF, with its Open PDF button circled.

The Documents icon: every file in one list

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 **Documents** icon (a page). Every file on this customer is listed with its date.
5. Click a file to open it.



Picture: The Documents icon (a page) on the right edge circled, the list of files open beside it.

Links the system sends

The customer's upload link, agreement link and booking link are theirs alone (they carry their RO number). Two of them are also on the contact profile: **REPAIR AUTHORIZATION LINK** (folder **FORM LINKS**, the agreement link) and **Appraisal Document Upload Link** (folder **CARRIER & APPRAISER**). The booking link is only in the customer's texts and emails. Never forward one customer's link to another customer.

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**.

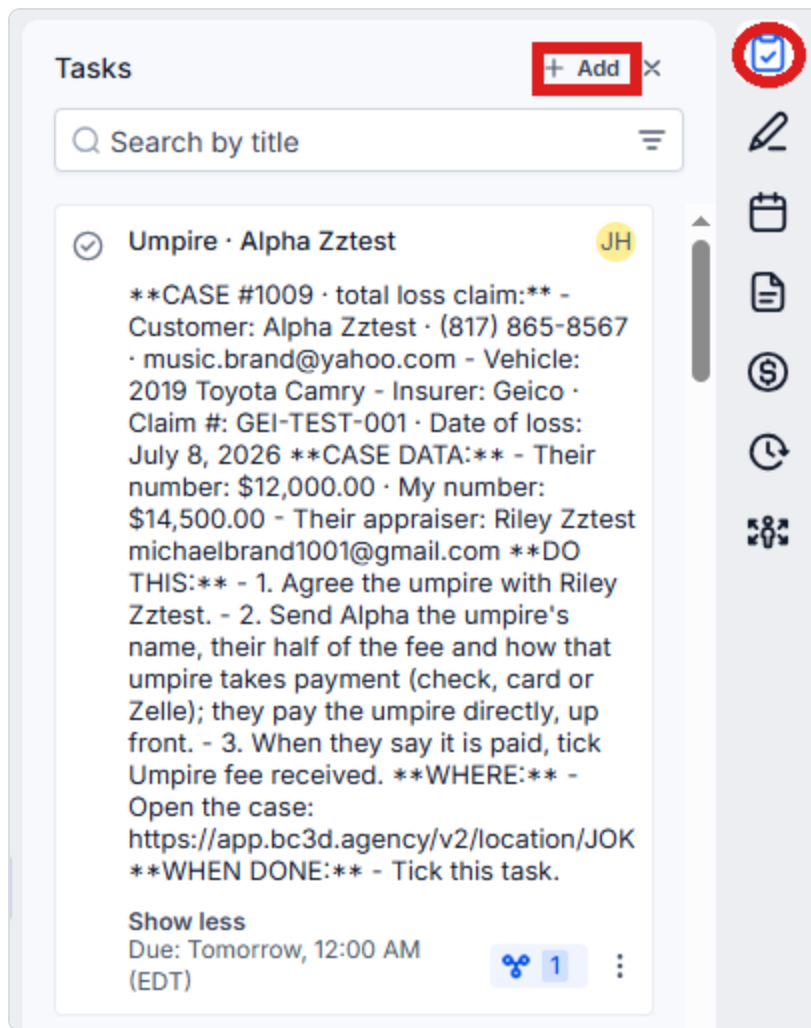
Who gets which tasks

- **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 tasks you will see, and what each one means

Answers: what does this task mean? what do I do with it, and where? whose task is it? how do I finish it?

Every task pdrOS can give you or Sharon, by stage. One line each: what it means, what to do and where, and how it ends. The task itself carries the facts and the steps.

How to read the tables

- **Open a task:** in the left menu, click **Tasks**. Click the task's row, then click **Open Full View**.
- **The routes:** the **Do** column gives a short route for each task, with arrows. **Contacts** → the customer means: in the left menu, click **Contacts**, search the customer's last name or RO number (your case number), and click their name. Their contact profile opens. The link under **WHERE** in the task opens the same contact profile in a new browser tab.
- **The middle** is the middle of the contact profile, where the customer's texts and emails are. **The message box** is at its bottom: pick **SMS** or **Email** with the small button at its left end, type, and click the paper-plane button.
- **Save:** after you change a field, click the blue **Save** button at the bottom of the left side.
- **When done:** in the left menu, click **Tasks**, open the task and 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. Only three tasks are built to close themselves: △ Demand not sent, △ Our report not sent and △ Counteroffer not sent. They close when the email finally goes. Every other task stays on your list until you, or Sharon, click **Mark Complete**.

Opening a case

Arrows mean: click this, then this.

Task	Means	Do	When done
Call the referred customer · NAME (from SHOP)	A body shop sent you a customer through the referral form.	Call them. Fill the signup with them from the link in this task (not your own signup bookmark, which would make a second contact profile): Tasks → the task → Open Full View → the signup link in the task.	Mark Complete

Task	Means	Do	When done
A Send switch could not act · NAME	You set a switch on the wrong case type, or a number it needs is empty.	Read why: Tasks → the task → Open Full View → DO THIS . If it says the type is wrong, there is nothing more to do: that switch is not used on this type. Type what is missing: Contacts → the customer → folder CASE → Range low, Range high, Carrier's offer ; folder OUTCOME → Award amount, Title fees, Sales tax % ; folder Insurance Info → Deductible . Click the blue Save button. Wait a minute. Then folder CASE → the switch → Send it now → the blue Save button.	Mark Complete
A Send switch did not go · NAME	A switch has read Send it now for five minutes and nothing happened.	Contacts → the customer → folder CASE → the switch that reads Send it now → Not sent (see task) → the blue Save button. Wait one minute. Then the same switch → Send it now → the blue Save button. Still stuck five minutes later: send it yourself, pick I sent it myself , Save, and tell us (Support → Support Ticket).	Mark Complete

Documents

Arrows mean: click this, then this.

Task	Means	Do	When done
Chase documents · NAME	Day 5, nothing uploaded yet.	Call the customer.	Mark Complete
Nothing after three weeks · close it? · NAME	It comes on day 19: still nothing, reminders have stopped.	Call once more, or close it: Contacts → the customer → folder OUTCOME → Outcome → Went quiet → the blue Save button.	Mark Complete
Documents in · value it · NAME	The documents are in (links in the task).	Open them from the links under CASE DATA in the task. Write your valuation in RTAflow. Then Contacts → the customer → folder Estimates → Upload Estimate Doc Here → Click to upload → your PDF → Open → the blue Save button.	Mark Complete
Enter the shop's estimate in CCC1 · NAME (Sharon)	Both estimates are in on a short pay (links in the task).	Open them from the links under CASE DATA in the task. Enter the shop's estimate in CCC1 so John can rewrite.	Mark Complete

Task	Means	Do	When done
Finish the rewrite · NAME	Same moment, for John.	Write the rewrite. Then Contacts → the customer → folder Estimates → Upload Estimate Doc Here → Click to upload → your PDF → Open → the blue Save button.	Mark Complete

Range and agreement

Arrows mean: click this, then this.

Task	Means	Do	When done
Set the range · NAME	Your report is in.	Contacts → the customer → folder CARRIER & APPRAISER → My number : type it → the blue Save button. Folder CASE → Range low, Range high : type them → the blue Save button. Then folder CASE → Send range → Send it now → the blue Save button.	Mark Complete
Range not answered · call NAME	Day 7 after the range, no signature.	Call them.	Mark Complete
Send the demand · NAME	The customer signed.	Make the RTA or demand in RTAflow. Contacts → the customer → folder CASE → RTA or demand PDF → Click to upload → your PDF → Open → the blue Save button. Check folder Insurance Info → Claim # , folder FORM Repair Authorization → Date of Loss , and folder CARRIER & APPRAISER → Adjuster name and Adjuster email (the blue Save button if you changed any). Then folder CASE → Send demand → Send it now → the blue Save button.	Mark Complete
Send a custom invoice · NAME	The fee on this case is not the standard \$600, so no automatic invoice went.	Send the Square invoice by hand: Invoices → a new invoice for this customer with the line Appraisal fee at this case's amount → send it. Step by step: Invoices and payments .	Mark Complete
Invoice the shop · NAME	Fee payer is the shop.	Invoice the shop by hand: Invoices → a new invoice made out to the shop → send it. Step by step: Invoices and payments .	Mark Complete

Demand and the other side

Arrows mean: click this, then this.

Task	Means	Do	When done
⚠ Demand not sent · NAME	Something the demand needs is missing (the task names it).	Fill what the task names: Contacts → the customer → folder CASE → RTA or demand PDF ; folder Insurance Info → Claim # ; folder FORM Repair Authorization → Date of Loss ; folder CARRIER & APPRAISER → Adjuster email . Click the blue Save button. Wait a minute. Then folder CASE → Send demand → Send it now → the blue Save button.	Closes itself when the email goes
No contact in 7 business days · call the carrier · NAME	Day 10 after the RTA, their appraiser has not called.	Call the carrier.	Mark Complete
Still no contact after 17 days · NAME	Day 17, still nothing.	Escalate with the carrier.	Mark Complete
Their appraiser is in contact · send our report · NAME	You typed their contact date.	Contacts → the customer → folder CASE → Send our report → Send it now → the blue Save button.	Mark Complete
⚠ Our report not sent · NAME	The other appraiser's email (on a claimant case, the adjuster's), your report or the claim number is missing.	Fill what the task names: Contacts → the customer → folder CARRIER & APPRAISER → Other appraiser email (claimant: Adjuster email); or folder Estimates → Upload Estimate Doc Here ; or folder Insurance Info → Claim # . Click the blue Save button. Wait a minute. Then folder CASE → Send our report → Send it now → the blue Save button.	Closes itself when the email goes
⚠ Demand sent, record it by hand · NAME (also Our report or Counteroffer)	Rare: the email went, but pdrOS could not write the sent date and the switch on the case.	Set what the task names by hand: Contacts → the customer → folder CARRIER & APPRAISER → the sent date (pick today) → folder CASE → the switch → Sent → the blue Save button.	Mark Complete
Day 22 · no report from their appraiser · NAME	Two chases went, nothing back.	Call them, or call the umpire.	Mark Complete
Three chases, no answer · NAME	Claimant case: three demand chases to the adjuster got no reply.	Call the adjuster's supervisor. The customer is being asked how it stands.	Mark Complete

Negotiation

Arrows mean: click this, then this.

Task	Means	Do	When done
Negotiate · NAME	Their figure or their report is in.	Contacts → the customer → folder CARRIER & APPRAISER → Counteroffer : type your figure; Negotiation note (optional): type one line → the blue Save button. Then folder CASE → Send counter → Send it now → the blue Save button.	Mark Complete
⚠ Counteroffer not sent · NAME	Something the counter needs is missing (the task names it: Counteroffer, Their number, My number, Claim # or the email).	Contacts → the customer → folder CARRIER & APPRAISER → Counteroffer : type it → the blue Save button. Wait a minute. Then folder CASE → Send counter → Send it now → the blue Save button.	Closes itself when the email goes
No answer to your counter in 7 days · NAME	Silence after your counter.	Call them; or Contacts → the customer → folder CARRIER & APPRAISER → Umpire → Called → the blue Save button.	Mark Complete
Umpire · NAME	You set Umpire to Called.	1. Agree the umpire with their appraiser. 2. Send the customer an invoice for their half of the umpire's fee: Invoices → + New → New Invoice (step by step: Invoices and payments). Release your valuation to the umpire only after it is paid. 3. When it is paid: Contacts → the customer → folder CARRIER & APPRAISER → Umpire fee received : pick Received → the blue Save button.	Mark Complete

Settlement and money

Arrows mean: click this, then this.

Task	Means	Do	When done
Check the settlement summary · NAME	The award is in.	Check the five numbers: Contacts → the customer → folder OUTCOME → Award amount , Title fees , Sales tax % ; folder CASE → Carrier's offer ; folder Insurance Info → Deductible . Fix any, then click the blue Save button. Then folder CASE → Send summary → Send it now → the blue Save button.	Mark Complete

Task	Means	Do	When done
Fee not paid · NAME	A hired case has an Outcome and Fee paid is still No.	When paid by Venmo, check or cash, or if you waive it: Contacts → the customer → folder CASE → Fee paid → Venmo, Check, Cash or Waived → the blue Save button. Then record the payment on the invoice, or void it for Waived only: Step 10 . A Square payment sets Fee paid for you.	Mark Complete

Inspections

Arrows mean: click this, then this.

Task	Means	Do	When done
Call to book the inspection · NAME	A travel inspection, or the office booking chase ran out.	Call. Book it: Contacts → the customer → right edge Appointments → + Add → Meetings → Calendar: Inspections Calendar → Date , then Slot → Book appointment .	Mark Complete
Write the inspection report · NAME	The photos are in.	See them: RO Hub → the case (type the RO number in the box under RO #: , click Search) → Docs → Scope Sheet Images (PDF) . Write the report. Then Contacts → the customer → folder Estimates → Upload Estimate Doc Here → Click to upload → your PDF → Open → the blue Save button.	Mark Complete
Record their decision · NAME	The report went to the customer.	When they answer: Contacts → the customer → folder SHORT PAY & INSPECTION → Engaged against → None, Shop or Carrier → the blue Save button.	Mark Complete
Send the demand · inspection · NAME	You are taking it on.	Shop: send your letter, then Contacts → the customer → folder CARRIER & APPRAISER → RTA or demand sent date : pick the day → the blue Save button (or folder CASE → Send demand → I sent it myself → the blue Save button). Carrier: as a normal demand (folder CASE → RTA or demand PDF → Click to upload → your PDF → Open → the blue Save button; then Send demand → Send it now → the blue Save button).	Mark Complete

Deadlines and outcomes

Arrows mean: click this, then this.

Task	Means	Do	When done
Demand-by date in 14 days · NAME	A deadline you set is two weeks out.	Send the demand before it: Contacts → the customer → folder CASE → Send demand → Send it now → the blue Save button.	Mark Complete
Statute deadline in 14 days · NAME	The statute date is two weeks out.	Decide with the customer: file in court before the date, or close the case (Contacts → the customer → folder OUTCOME → Outcome → the ending that fits → the blue Save button; see Other endings).	Mark Complete
No answer for a year · close it? · NAME	The customer never said how a court or pending case ended.	Call them. Then Contacts → the customer → folder OUTCOME → Outcome → their answer → the blue Save button.	Mark Complete

Urgent, from customer messages

Arrows mean: click this, then this.

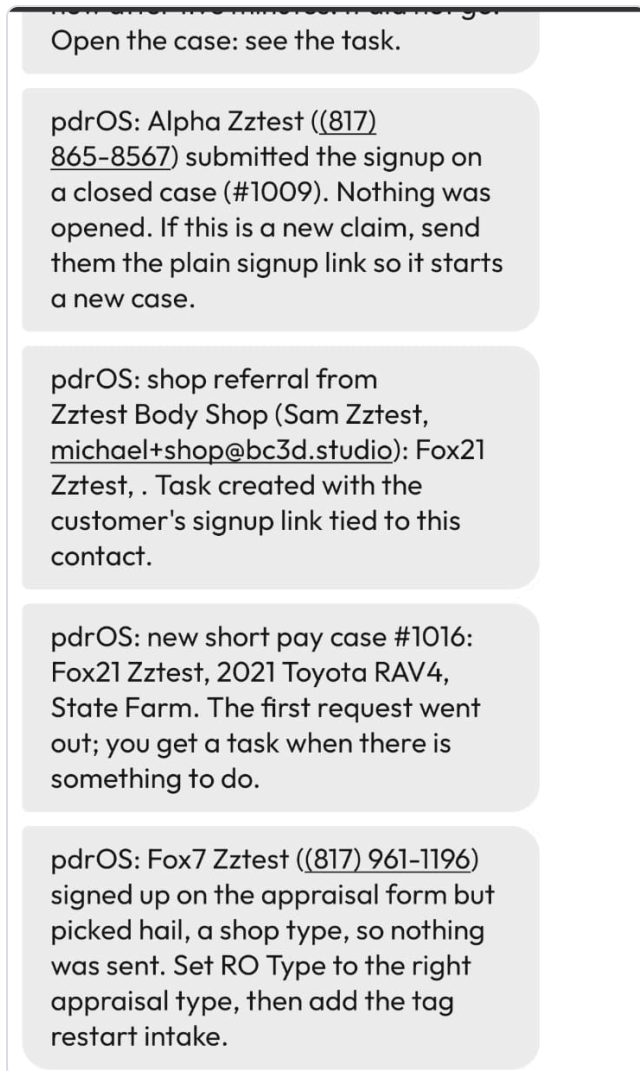
Task	Means	Do	When done
URGENT · refund request · NAME (John)	The customer wrote the word refund, by text or email.	Read their message (Contacts → the customer → the middle). Call them now.	Mark Complete
URGENT · unhappy customer · call within the hour · NAME (Sharon)	The customer sounds angry.	Read first: Contacts → the customer → the middle, and right edge Notes . Call within the hour, by phone.	Mark Complete , only when the customer says they are satisfied
Customer has a money question · NAME (Sharon)	They asked about the fee, how to pay, or a figure.	Read their messages: Contacts → the customer → the middle. The fee: answer from the task (Tasks → the task → Open Full View), in the message box. A figure about the claim: John answers.	Mark Complete
Customer wants a date or an update · NAME (Sharon)	They asked when.	Give the next step from Case status : Contacts → the customer → folder CASE → Case status . Reply in the message box. Never a settlement date.	Mark Complete

Task	Means	Do	When done
Customer gave new contact or case details · NAME (Sharon)	New phone, email, address or claim details in the thread.	Update within the hour. Contacts → the customer → folder Contact (phone, email); folder General Info (address); folder Insurance Info (Insurance Company, Claim #); folder CARRIER & APPRAISER (adjuster, other appraiser). Click in the field's box, delete the old value and type the new one. Click the blue Save button.	Mark Complete
Customer asked for a document · NAME (Sharon)	They want a copy of the agreement, the report or the summary.	The agreement: RO Hub → the case (type the RO number in the box under RO #: , click Search) → Docs → Repair Authorization Form (it opens in a new tab; save it with the browser's download arrow). The report: Contacts → the customer → folder Estimates → click the file's name in Upload Estimate Doc Here . Save it to your computer. Then the message box → Email → the paperclip → the file → the paper-plane button. The summary went to them by email: find it in the middle and forward it.	Mark Complete
Sarah needs a person · NAME (Sharon)	Most often to move or cancel an inspection; sometimes billing or a question.	Read the whole thread first: Contacts → the customer → the middle. To cancel: right edge Appointments → the three dots on the appointment → Cancel . To move: the three dots → Edit → Date and Slot → Save .	Mark Complete
Sarah handover · NAME (Sharon)	Sarah stepped back: offer, release, umpire, court, deadline, or they asked for a person. She is asleep on them for 8 hours.	Read the thread (Contacts → the customer → the middle); one of you replies in the message box.	Mark Complete
User query (John)	A one-line task pdrOS makes at a handover, with what the customer asked.	Answer the customer: Contacts → the customer → the message box.	Mark Complete

Texts to your phone: what each alert means

Answers: what does this text on my phone mean? what do I do about it? how do I get from the text to the customer?

Your phone gets a text only for things that cannot wait. Each starts with "pdrOS:" and names the customer and their RO number (your case number), written "case #1007". When a task goes with it, the text says "Task created".



Picture: Three pdrOS alerts in a row on John's phone.

From the text to the customer

The text names the customer and the case number. To act on it at your computer:

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 the 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.

When the text says "Task created", you can start from the task instead. In the left menu, click **Tasks**, click the task's row, then click **Open Full View**.

The **Do** column below gives the short route for each text. **Contacts** → the customer means the three steps above. "The middle" is the middle of the contact profile, with the customer's texts and emails; "the message box" is at its bottom.

New business

Arrows mean: click this, then this.

Text says	Means	Do
new [type] case #N: NAME, vehicle, insurer. The first request went out	A signup landed and the welcome and documents request went.	Nothing yet; a task comes when there is something to do.
shop referral from SHOP: NAME, phone. Task created with the customer's signup link	A shop referred someone.	Call them. Fill the signup with them from the link in the task: Tasks → the task → Open Full View → the signup link in the task.
NAME, referred by SHOP 3 days ago, has not started the signup. Give them a call	Three days, no signup.	Call.
a text from (phone), who is not on any case. They were asked for their name and vehicle... To open their case on this same contact, use: [link]	A stranger texted the 610 number. Sarah asked who they are.	Read it: Conversations → Unread → their phone number. If it is a new customer, call them and fill the signup with them from that link in the text. It lands on the same contact profile.
NAME signed up on the appraisal form but picked hail, a shop type, so nothing was sent	Wrong type on the form.	Contacts → the customer → folder REPAIR STATUS → RO Type → the right appraisal type → the blue Save button. Then tell us: Support → the orange Support Ticket button → the RO number and "please restart the intake". We do it within the hour.

Text says	Means	Do
NAME submitted the signup on a closed case (#N). Nothing was opened	A past customer used their old link.	If it is a new claim, send them the plain signup link (Your three links): Contacts → the customer → the message box → SMS → paste the link alone → the paper-plane button.
the intake for NAME did not finish: no file number or upload link after 10 minutes	The signup did not finish: no RO number (the text says "file number") and no upload link after 10 minutes.	Tell us: Support → the orange Support Ticket button → the customer's name and "the intake did not finish, please fix it and restart the intake" (Getting help). We do it within the hour.

Progress on a case

Arrows mean: click this, then this.

Text says	Means	Do
NAME signed the [type] agreement (case #N). The fee invoice is going out	Signed.	Task: Send the demand. Tasks → the task → Open Full View .
short pay #N for NAME has both estimates. Please enter the shop's estimate in CCC1 (to Sharon's phone)	Both estimates in.	Sharon's task: Tasks → the task → Open Full View .
the rewrite for NAME is in and the agreement went	Your rewrite reached the owner with the agreement link.	Wait for the signature.
the other appraiser's report is in on NAME. Type Their number when you have read it	Their report landed.	Read it: Contacts → the customer → folder Supplements → click the file's name in Supplement #1 Upload Doc Here . Then folder CARRIER & APPRAISER → Their number : type it → the blue Save button.
the other side answered on NAME: \$X. You are at \$Y. Task created: negotiate	Their figure.	Counter. The task has the steps: Tasks → the task → Open Full View .
new figure from the other side on NAME: \$X	A later round.	Counter: Contacts → the customer → folder CARRIER & APPRAISER → Counteroffer : type it → the blue Save button. Then folder CASE → Send counter → Send it now → the blue Save button.

Text says	Means	Do
Pat Smith replied by email about one of your cases. Open Conversations → Pat to read it	The adjuster or appraiser answered an email.	Read it in their conversation: Conversations → Unread → the name in the text.

Something is late

Arrows mean: click this, then this.

Text says	Means	Do
no contact from [insurer]'s appraiser in 7 business days on NAME	Clock A ran out (day 10 after the RTA).	Call the carrier (task: Tasks → the task → Open Full View).
day 22 and still no report from [appraiser] on NAME. Two chase emails went	Clock B ran out (the wait for their report after yours went).	Call them or the umpire (task: Tasks → the task → Open Full View).
three demand chases to [insurer] on NAME got no answer	Claimant demand ignored three times.	Call the adjuster's supervisor (task: Tasks → the task → Open Full View). The customer is asked how it stands.
no answer in 7 days to your counter of \$X on NAME	Silence after a counter.	Call, or Contacts → the customer → folder CARRIER & APPRAISER → Umpire → Called → the blue Save button.
demand-by date in 14 days on NAME: DATE / 3 days left before a deadline on NAME	Your deadline is near.	A demand-by date: send it: Contacts → the customer → folder CASE → Send demand → Send it now → the blue Save button. A statute deadline: see the next row.
statute deadline in 14 days on NAME: DATE. If it goes to court it must be filed by then	Statute near.	Decide with the customer: file in court before that date, or close the case. Your task has the steps: Tasks → the task → Open Full View .
the fee on NAME is still unpaid after 14 days. The invoice keeps reminding them	Fee open two weeks after settlement.	Call if you want; the invoice keeps reminding.

Text says	Means	Do
a Send switch on NAME still says Send it now after five minutes. It did not go	A setting was swallowed, or the case is closed.	On a closed case, do nothing: switches do not work there. Otherwise, set it again: Contacts → the customer → folder CASE → the switch that reads Send it now → Not sent (see task) → the blue Save button. Wait one minute. Then the same switch → Send it now → the blue Save button. Do not pick I sent it myself as the reset (it records the email as sent by you); pick it only if you really sent the email yourself.

Inspections

Arrows mean: click this, then this.

Text says	Means	Do
NAME arrives at DATE TIME and has not signed the agreement. Have them sign on your phone: [link]	One hour before the visit, unsigned.	Open the link on your phone when they arrive.
NAME cancelled or missed the inspection (case #N). They were sent the booking link again	Cancel or no show.	Nothing; they rebook. Call if you like.
NAME (phone) booked an inspection but has no appraisal case. Open their contact and send them the Appraisal Case Signup link	Someone booked without a case (a new name typed into the calendar).	Send them the signup link (Your three links): Contacts → the name in the text → the message box → SMS → paste the link alone → the paper-plane button.

Customers who need a person

Arrows mean: click this, then this.

Text says	Means	Do
URGENT "refund" from NAME, case #N. Read their message and call them now	They wrote refund.	Read it: Contacts → the customer → the middle. Call now.
An office text that a customer is unhappy (to Sharon's phone; the task is URGENT · unhappy customer · call within the hour · NAME)	Complaint.	Sharon calls within the hour. Her task has the steps: Tasks → the task → Open Full View .

Text says	Means	Do
An office text that a customer asked Sarah something she does not answer (to Sharon's phone; the tasks are Customer has a money question, Customer wants a date or an update, Customer gave new contact or case details, Customer asked for a document, Sarah needs a person , each · NAME)	Sarah routed a question.	Sharon's task: Tasks → the task → Open Full View . John answers figures.
Sarah handed NAME to you (vehicle, type). The bot is asleep on it for 8 hours. Their last message is in the case conversation	Handover: they asked about an offer, a release, the umpire, court or a deadline, or asked for a person.	Reply yourself: Conversations → Unread → the customer → the message box at the bottom of the middle.
missed call from (phone), not on an open case. Nothing was sent to them	A stranger called the 610 number.	Call back if you want. (A customer with an open case gets a "sorry we missed your call" text and a note; you get nothing.)

Your three links

Answers: where is the signup link? what link do I give a shop? what if a customer lost their upload link? how do I put the links on my phone? how do I open this guide on my phone?

You have three links to hand out. Keep them in your browser bookmarks and on your phone's home screen; nothing else in pdrOS needs a link. A fourth address, this guide's own, is for you (at the end of this page).

The signup link

<https://link.bc3d.agency/widget/form/PVooC4j81EWpc2JSTCnZ>

For a **new** customer only. The usual way: open it yourself while they are on the phone, and fill it with them as you talk. [The signup form](#)

To have them fill it on their own phone instead, send it to them. Copy the link from this page: select it, then press Ctrl+C. Paste it with Ctrl+V into a text or email from your own phone or email (they have no contact profile yet). In a text, send it alone, with no words around it. On a Mac, use the Command key instead of Ctrl.

Never give it to someone who is waiting to start a case (a referred customer, someone who texted the 610 number). Their own signup link is waiting for you, and it lands on their own contact profile; this link would make a second one. The one exception: a past customer with a new claim gets this link, because a new claim needs its own contact profile.

- **A referred customer:** the link is in your task. In the left menu, click **Tasks**. Click the row of the task **Call the referred customer · NAME (from SHOP)**, then click **Open Full View**. The signup link is written in the task.
- **Someone who texted the 610 number:** the link is at the end of the alert text on your phone.

The shop referral link

<https://link.bc3d.agency/widget/form/GC1h4fUWtSuyVkggI5fX>

Give it to body shops. When a shop fills it, pdrOS makes a contact profile for the customer and emails them a welcome with their own signup link. You get the "Call the referred customer" task. [Shop referrals](#)

The blank upload link

<https://link.bc3d.agency/widget/form/1ThIgkjANhN18YFWCTSo>

Only when a customer has lost theirs and you cannot find their contact profile. Their own upload link is always better: files sent through it land on their contact profile by themselves. It is the field **Appraisal Document Upload Link**, in folder **CARRIER & APPRAISER**. Through the blank link, the customer has to type their name and you may have to match the files by hand.

To text a customer their own upload link:

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 **CARRIER & APPRAISER** and click the folder's name to open it. 5. Find **Appraisal Document Upload Link**. 6. Click in the box under it. 7. Press Ctrl+A to select the whole link. 8. Press Ctrl+C to copy it. Do not type anything in the box. 9. At the bottom of the middle of the contact profile is the message box. At its left end, click the small button with a down arrow. 10. Pick **SMS**. 11. Click in the message box and press Ctrl+V to paste the link. Leave it alone in the text, with no words around it. 12. Click the paper-plane button at the right end of the box.

On a Mac, use the Command key instead of Ctrl. If a blue **Save** button appears at the bottom of the left side, the link was changed by accident. Do not click it: click **Cancel** next to it, which throws the change away.

Contact Details

Bravo Zztest

Owner: 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

Fields: All fields | DND | Actions

Search: Appraisal Document Upload Link

CARRIER & APPRAISER

Appraisal Document Upload Link
https://link.bc3d.agency/widget/form/IThlgkjANhNI8YFWCTSo?contact_id=c4t

Picture: Folder CARRIER & APPRAISER open: Appraisal Document Upload Link circled.

This guide on your phone

<https://pdros-guide.pages.dev/cscpa/>

In pdrOS, this guide is the **Support** item in the left menu. On your phone, the pdrOS app does not show it, so open the address above in your phone's browser and add it to the home screen (steps below). The support chat and the orange **Support Ticket** button are at the top of its first page.

Keep them on your phone

Name the icons "Signup", "Shop referral", "Upload" and "Guide".

iPhone:

1. Open the link in Safari (tap it on this page, or type it into Safari's address bar).

2. Tap **Share** (the square with the arrow).
3. Scroll down the list and tap **Add to Home Screen**.
4. Type the icon's name.
5. Tap **Add**.

Android:

1. Open the link in Chrome.
2. Tap the three dots  at the top right.
3. Tap **Add to Home screen**.
4. Type the icon's name.
5. Tap **Add**.

Computer:

1. Open the link in your browser.
2. Click the star at the right end of the address bar to bookmark it.

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

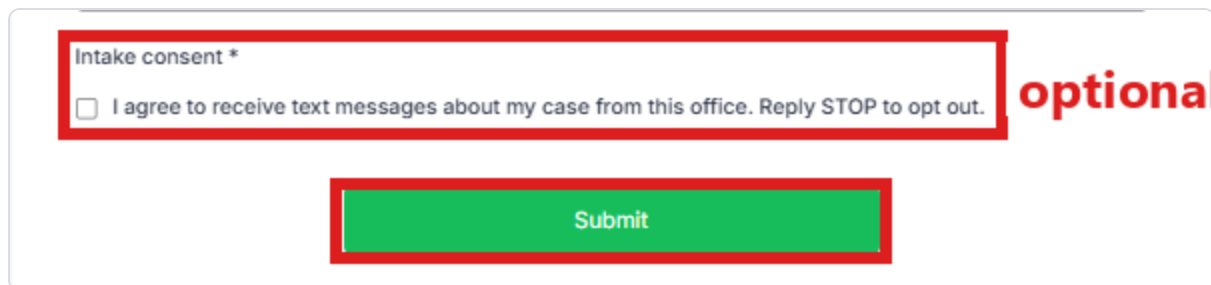
How they found us

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.



Intake consent *

☐ I agree to receive text messages about my case from this office. Reply STOP to opt out.

optional

Submit

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

Bravo Zztest

Owner
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](#).

Shop referrals: when a body shop sends you a customer

Answers: a shop sent me a customer, what happens? what do I do with the Call the referred customer task? where is the referred customer's own signup link?

A shop fills the short referral form with the customer's name and phone and what happened. pdrOS emails the customer a welcome with their own signup link and gives you the task "Call the referred customer".

What the shop does

The shop has the referral link (Appraisal Shop Referral Form). They type the shop name, their contact, the shop email, the customer's name, phone and email, and a line on what happened. Thirty seconds.

What pdrOS does, within a minute

1. Makes the customer's contact profile, tagged as a shop referral, assigned to you.
2. Emails the customer: "[Shop] asked us to help with your claim", with their own signup link.
3. Texts you: "shop referral from SHOP: NAME, phone. Task created with the customer's signup link".
4. Gives you the task **Call the referred customer · NAME (from SHOP)** with the shop's words and the link.
5. Waits three days for the signup. If nothing comes, you get "NAME, referred by SHOP 3 days ago, has not started the signup. Give them a call".

What you do

1. Call the customer: what the shop told you, what you do, the \$600 fee and, on a total loss, the \$700 promise (the fee comes back if the final value is not at least \$700 over the offer).
2. Either they fill the signup from the email, or you fill it with them on the phone **from the link in the task** (steps below). That link is tied to their contact profile, so the signup lands on their own contact profile.
3. Never send them the plain signup link: it would make a second contact profile for the same person.
4. When you have called them, mark the task complete (steps below).

Fill the signup from the task

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 row of the task **Call the referred customer · NAME (from SHOP)**. A short preview opens under it.
3. Click **Open Full View**. The whole task shows, with the shop's words and the customer's signup link.
4. Click the customer's signup link in the task. Their signup form opens, already tied to them. You are in the right place when you see the boxes **First Name**, **Last Name**, **Email** and **Phone** at the top.
5. Fill the boxes with them as you talk. Every box is explained in [The signup form](#).
6. Ask "OK to text you updates?" and check the consent box only if they say yes.
7. Click **Submit** at the bottom of the form.

Call the referred customer · Charlie Zztest (from Zztest Body Shop)
☐ Mark Complete

Oct 2

Related Information

Assigned to: John Hayduk

Charlie Zztest

RO# 1013

+18178658567

music.brand@yahoo.com

Task Details

CASE # :

- Customer: Charlie Zztest · (817) 865-8567 · music.brand@yahoo.com
- Vehicle:
- Insurer: · Claim #: · Date of loss:

CASE DATA:

- What happened (the shop's words, also the red bubble in RO HUB): The insurer short-paid the repair.
- Their signup link, tied to this contact: https://link.bc3d.agency/widget/form/PVooC4j8lEWpc2JSTCnZ?contact_id=mjQW866E6Rh6A14HU1A

DO THIS:

- 1. Call Charlie ((817) 865-8567): what the shop told us, what we do, the fee and the promise.
- 2. They fill the signup from the email we sent, or you fill it with them on the phone, from the link above. Never a plain signup link: that would make a second contact.

WHERE:

- Open the case: <https://app.bc3d.agency/v2/location/JOKy8MLUjehcuBM4EJk3/contacts/detail/mjQW866E6Rh6A14HU1A>

WHEN DONE:

- Tick this task.

Created: 10/2/2026, 6:31:03 PM

the signup link in CASE DATA is tied to this contact; use that one

Close

Open Contact

Mark Complete

Picture: The full view of the task Call the referred customer, the customer's signup link circled.

Mark the task complete

1. In the left menu, click **Tasks**.
2. Click the row of the task **Call the referred customer · NAME (from SHOP)**. A short preview opens under it.

3. Click **Open Full View**.
4. 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.

After the signup

The case runs as its type from there: the short pay path (the shop gets the upload email) or any other type you picked.

A text from someone with no case

Answers: someone texted the office with no case, what now? how do I start their case without a duplicate? an existing customer texted from a new phone, how do I change their number?

When a number that is not on any case texts the 610 number, pdrOS answers for you once and sends you the signup link for that same person.

What they get

"Thanks for your message to Collision Safety Consultants of PA. So we can find your file, please reply with your full name and the vehicle. We will get back to you shortly."

Sarah does not chat with them; she only works for customers with a case.

What you get

A text: "a text from (phone), who is not on any case. They were asked for their name and vehicle; read it in Conversations. To open their case on this same contact, use: [link]".

If they text again before you act, you get the alert again but they are not asked a second time.

What to do

First, read what they wrote

1. In the left menu, click **Conversations**.
2. At the top of the list of people, click **Unread**.
3. Click the row that shows their phone number (they have no name yet). Their thread opens in the middle. You are in the right place when you see their text and our reply asking for their name and vehicle.

If they are a new customer

1. Call them.
2. On your phone, open our alert text and tap the link at its end. It opens the signup form already tied to that person, so their case opens on the same contact profile with their number.
3. Fill the boxes with them as you talk. Every box is explained in [The signup form](#).
4. Ask "OK to text you updates?" and check the consent box only if they say yes.
5. Tap **Submit** at the bottom of the form.

Never make a second contact profile for them.

If they are an existing customer texting from a new phone

Put the new number on their existing contact profile, then reply there.

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, click the folder **Contact** to open it.
5. Click in the box with their phone number and delete the old number.
6. Type the new number with the area code.
7. Click the blue **Save** button at the bottom of the left side.
8. At the bottom of the middle of the contact profile is the message box. At its left end, click the small button with a down arrow and pick **SMS**.
9. Click in the box and type your reply.
10. Click the paper-plane button at the right end to send.

Wrong type, or the type changed later

Answers: I picked the wrong type, how do I fix it? where do I change the type? what happens if I change the type later?

The case type (field **RO Type** ⚡, in folder **REPAIR STATUS** on the contact profile) decides the whole path, and you can change it. Before the agreement is signed, pdrOS swaps the type, resets the documents step, re-sends the new type's first request (texts and email) and updates the agreement link. After the agreement is signed, it only updates the link and texts you; the customer gets nothing. No second welcome is ever sent.

RO Type is a list with twelve choices. Yours are the four appraisal types: **total loss claim**, **diminished value**, **short pay** and **post-repair inspection**. The other eight (hail, collision and the rest) belong to the body-shop side of pdrOS.

← Contact Details

All fields DND Actions

Q Search fields and folders

Estimates

Supplements

Insurance Info

FORM | Repair Authorization

REPAIR STATUS

RO Type

- mechanical
- windshield
- circle and go not here
- total loss claim
- diminished value ✓
- short pay
- post-repair inspection

FORM | Customer Signature

your four case types

Picture: Folder REPAIR STATUS open: the RO Type list open, the four appraisal choices circled.

You picked a shop type at signup (hail, collision, and so on)

Nothing goes to the customer. You get a text: "NAME signed up on the appraisal form but picked hail, a shop type, so nothing was sent."

Fix: 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). The text on your phone names the customer. 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 **REPAIR STATUS** and click the folder's name to open it. 5. Click the box under **RO Type** ⚡ and pick the right appraisal type from the list (**total loss claim, diminished value, short pay** or **post-repair inspection**). 6. Click the blue **Save** button at the bottom of the left side. 7. Tell us: in the left menu, click **Support**, then the orange **Support Ticket** button. Give the RO number and write "please restart the intake". We do it on our side within the hour.

Why the ticket: a shop-type signup never started the appraisal path, so there is nothing for pdrOS to re-send on its own (changing the type on a case that did start swaps the path by itself, see below). Once we restart it, the welcome, the request for the type and the reminders start as if it were a fresh signup.

You change the type before the customer signed

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 **REPAIR STATUS** and click the folder's name to open it.
5. Click the box under **RO Type** ⚡ and pick the new type from the list.
6. Click the blue **Save** button at the bottom of the left side.

Within a minute: - The documents already received are kept but the "documents in" step is reset, because the new type needs different things. - The customer gets the new type's request (texts and email), and the reminders restart for the new type. - The agreement link in **REPAIR AUTHORIZATION LINK** (folder **FORM LINKS**) changes to the new wording. - You get: "case #N (NAME) is now [type]. The right request went out and the agreement link was updated."

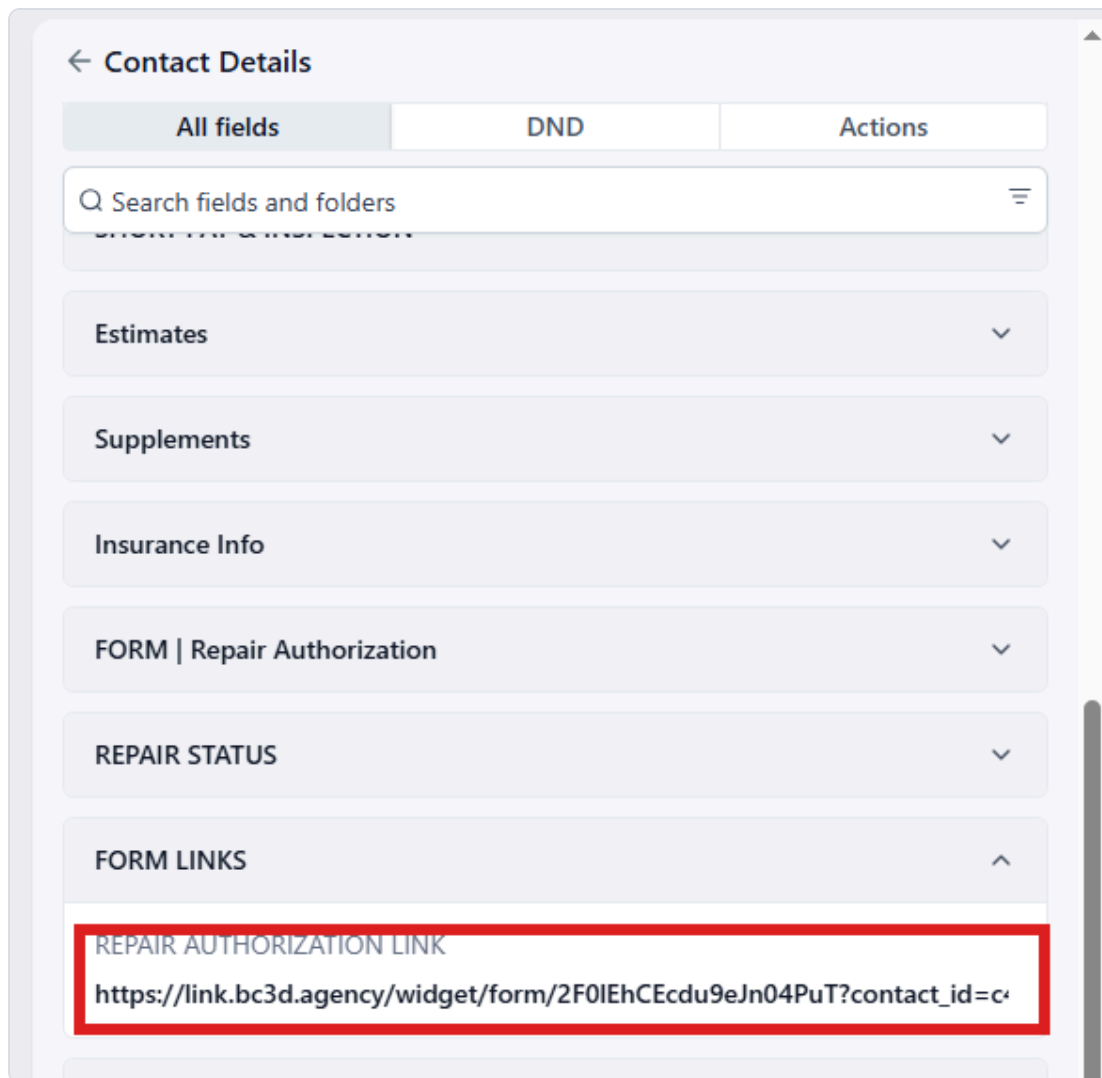
You change the type after the customer signed

The agreement they signed is for the old type. pdrOS swaps the agreement link and sends the customer nothing; you get: "case #N was changed to [type] after the agreement was signed. The signed agreement is for the old type: check with the customer and have them sign again if needed."

To change the type, then send the new agreement link yourself:

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 **REPAIR STATUS** and click the folder's name to open it.
5. Click the box under **RO Type**  and pick the new type from the list.
6. Click the blue **Save** button at the bottom of the left side. Within a minute pdrOS swaps the agreement link and texts you.
7. Talk to the customer. If they need to sign again, go on with step 8.
8. On the left side of the contact profile, scroll down to the folder **FORM LINKS** and click the folder's name to open it.
9. Click in the box under **REPAIR AUTHORIZATION LINK**. Do not type in the box.
10. Press Ctrl+A to select the whole link (Command+A on a Mac).
11. Press Ctrl+C to copy it (Command+C on a Mac).
12. At the bottom of the middle of the contact profile is the message box. At its left end, click the small button with a down arrow and pick **SMS**.
13. Click in the box and type a short line ("Here is your updated agreement to sign.").
14. Click the paper-plane button at the right end to send.
15. Click in the box and press Ctrl+V (Command+V on a Mac) to paste the link. Type nothing else: a link goes in a text of its own.
16. Click the paper-plane button at the right end to send.

The same thread also shows under **Conversations** in the left menu.



Picture: Folder FORM LINKS open: REPAIR AUTHORIZATION LINK circled.

You change it to a shop type by mistake

The appraisal path stops and your phone gets "case #N (NAME) was changed to [type], a shop type." Set it back to the right appraisal type and the path resumes:

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 **REPAIR STATUS** and click the folder's name to open it.
5. Click the box under **RO Type** ✂ and pick the right appraisal type from the list.
6. Click the blue **Save** button at the bottom of the left side.

A closed case

Changing the type on a closed case does nothing. If the customer has a new claim, start a new case with the plain signup link. Click your signup bookmark on your computer, or tap the "Signup" icon on your phone's home screen ([Your three links](#)). Then fill it with them as in [The signup form](#).

A total loss, start to finish: the stages

Answers: what stage is my case at? where do I see it? what does each stage mean? what does the customer hear at each stage?

A total loss moves through numbered stages from 1.1 New case to 6.3 Closed. At each stage the field **Case status** (folder **CASE** on the contact profile) holds one plain sentence, and it is what Sarah reads. Here is the map; the following articles take one step each.

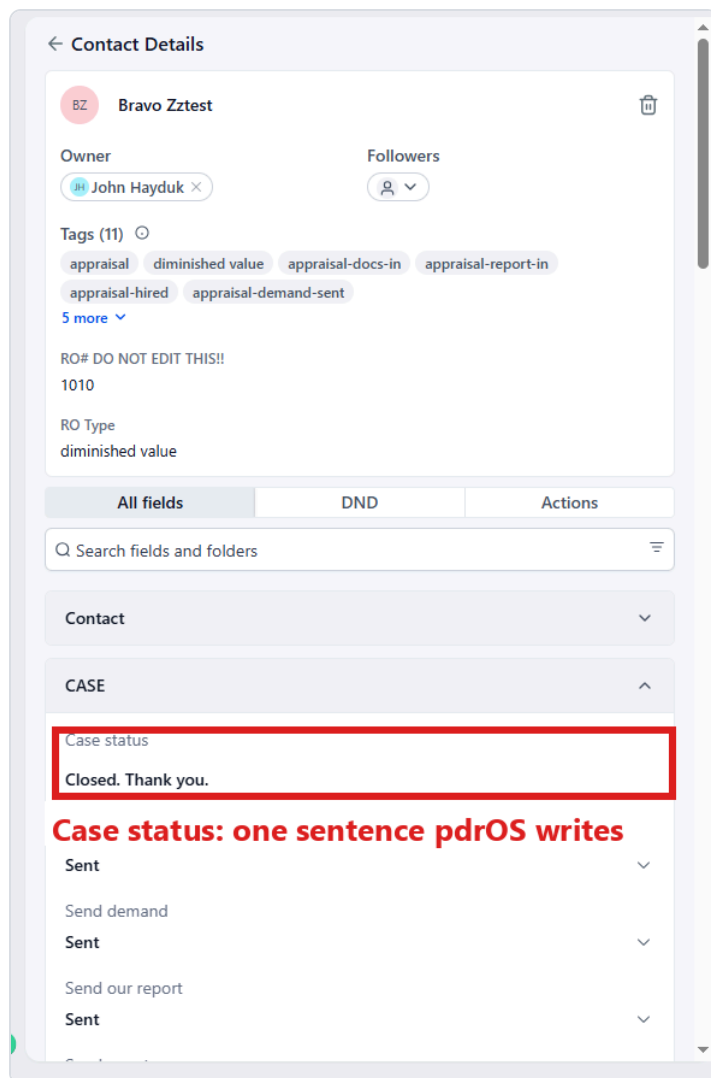
Stage	Name	Case status (what Sarah says if the customer asks)
1.1	New case	Case opened. We have sent you what we need from you to get started.
1.2	Documents in	We have your documents and are working on the valuation.
1.3	Report written	Our report is written. John Hayduk is finalizing the range to send you.
1.4	Range sent	We sent you our valuation and the agreement link. We are waiting for you to sign.
1.5	Hired	Agreement signed. We are preparing the demand to [insurer].
3.1	RTA or demand sent	The demand for appraisal went to [insurer] on [date]. Their appraiser has seven to ten business days to contact us (day 10 on the calendar).
3.2	Other appraiser in contact	The insurer's appraiser is in contact. The two appraisers are exchanging reports.
3.3	Report out	Our report went to their appraiser on [date]. We are waiting on theirs and follow up at day ten.
4.1	Their report or offer in	The other side has answered with their figure. We are reviewing it.
4.2	Negotiating	We are negotiating. Our latest counter went out on [date].
4.3	Umpire	The case is with the umpire. We are waiting on the decision.
4.4	Pre-court (claimant cases only)	We are preparing for court.
5.1	Award signed or settled	Settled. [Insurer] will contact you for the paperwork and pays you directly. Your settlement summary is on its way.
5.2	Summary sent	Settled. Your settlement summary was emailed to you.
6.1	Fee due	Settled. Our invoice is still open; it is in your email.
6.2	Outcome pending	We are waiting to hear how the claim ended. Tell us any time.
6.3	Closed	Closed. Thank you.

Stages 2.1 and 2.2 belong to inspections (booked, report sent).

See where one case stands

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. Read **Case status**. Its sentence matches one row of the table above.

You only looked, so there is nothing to save. pdrOS writes **Case status** for you at every stage.



Picture: Folder CASE open: Case status circled.

What moves a case

You never drag a case from stage to stage. pdrOS moves it when you do one of three things: upload a file, type a number or pick a date, or set a Send switch.

See every open case at once: the case board

The case board shows every open case as a card in its stage. It is a good Monday-morning screen.

1. In the left menu, click **Repair Stages**.
2. At the top left, pick the pipeline **APPRAISAL CASES**.
3. Each open case is a card in the column of its stage, 1.1 to 6.3. You are in the right place when you see columns of cards headed by stage numbers.

Look only: never drag a card; pdrOS moves them.



Picture: Repair Stages: the pipeline APPRAISAL CASES picked at the top left (circled), the cards in their stage columns 1.1 to 6.3.

The steps that follow

1. Documents
2. Your report and the range
3. The agreement and the fee
4. The RTA

5. The other appraiser
6. Negotiation
7. The umpire
8. The award
9. The settlement summary
10. Fee and close
11. Other endings

Step 1: the documents

Answers: how does the customer send documents? how long does pdrOS chase? what do I do when the documents are in? how do I upload a report the customer emailed me? how do I restart the reminders?

On a total loss, pdrOS asks the customer for the insurer's valuation report and keeps asking on a schedule. You do nothing until a task arrives: **Chase documents** • **NAME** on day 5 if nothing has come, or **Documents in** • **value it** • **NAME** when a file lands.



**COLLISION SAFETY
CONSULTANTS OF PA**
Auto damage appraisal for vehicle owners
and collision repair shops

Appraisal Document Upload

Upload Photos: tap the box below, upload
as many photos as you like


Upload Photos Here

photos go here; documents in the boxes below

Upload Documents: Tap each box,
choose the file, done.


Carrier valuation report

Picture: The upload page on a phone: the photo button at the top, the document boxes under it.

What the customer sees

At signup: a text ("First step: we need the insurer's valuation report... Upload it with the link in my next text; photos of the car help too"), the upload link in its own text, and the email "One document to start: the insurer's valuation report".

Then, if nothing arrives: - **Day 2**: a reminder text, the upload link again, and the email "Still waiting on one thing to start your case". - **Day 12**: the same reminder again.

Reminders go between 8 am and 8 pm only.

What you get

- **Day 5**: the task **Chase documents · NAME**. Call them, then mark the task complete (steps below).
- **Day 19**: the task **Nothing after three weeks · close it? · NAME**. The reminders stop. Call once more, or set **Outcome** to **Went quiet** to close the case (steps below). Either way, then mark the task complete.

To mark one of these tasks complete:

1. In the left menu, click **Tasks**.
2. Click the task's row (click **Due Today** or **Overdue** at the top if you do not see it).
3. Click **Open Full View**.
4. 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.

Close it as Went quiet

You can also start from the task **Nothing after three weeks · close it? · NAME**. 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 start at step 4.

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 **OUTCOME** and click the folder's name to open it.
5. Click the box under **Outcome** and pick **Went quiet** from the list.
6. Click the blue **Save** button at the bottom of the left side.

When a file arrives

The customer's upload link puts the file into one of four boxes. All four are in folder **CASE** on their contact profile: **Carrier valuation report**, **Repair invoice**, **Shop estimate PDF** or **Carrier estimate PDF**. On a total loss any one file in any box counts, so a report dropped in the wrong box still starts the case.

Within about a minute of the upload: 1. The reminders stop. 2. The case moves to **1.2 Documents in**; Case status changes to "We have your documents and are working on the valuation." (nothing is sent) 3. You get the task **Documents in · value it · NAME** with links to every file received.

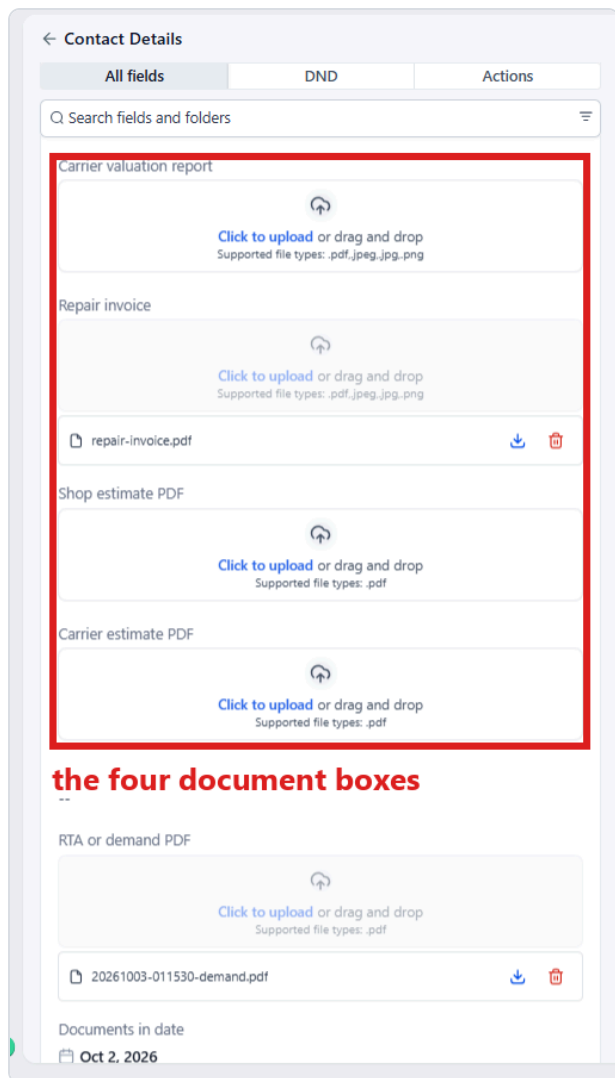
A second file afterwards changes nothing (no second task).

If the documents come to you another way

If the customer emails or hands you the report, upload it yourself. If it came by email, first save the attachment to your computer: in the email, click the attachment's download arrow; it goes to your **Downloads** folder.

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. In **Carrier valuation report** ↗, click **Click to upload**, pick the PDF on your computer and click **Open**.
6. Click the blue **Save** button at the bottom of the left side.

Same result: the reminders stop, the case moves to **1.2 Documents in**, and you get the task **Documents in · value it**.



Picture: Folder CASE open: the four document boxes (Carrier valuation report, Repair invoice, Shop estimate PDF, Carrier estimate PDF) circled.

Starting the reminders again

Sometimes you want the reminder schedule to run again on a case, for example after you spoke to them and they promised to upload. Tell us: in the left menu, click **Support**, then the orange **Support Ticket** button. Give the RO number and write "please restart the document reminders". We do it on our side within the hour. The schedule restarts from day 2.

Step 2: your report and the range

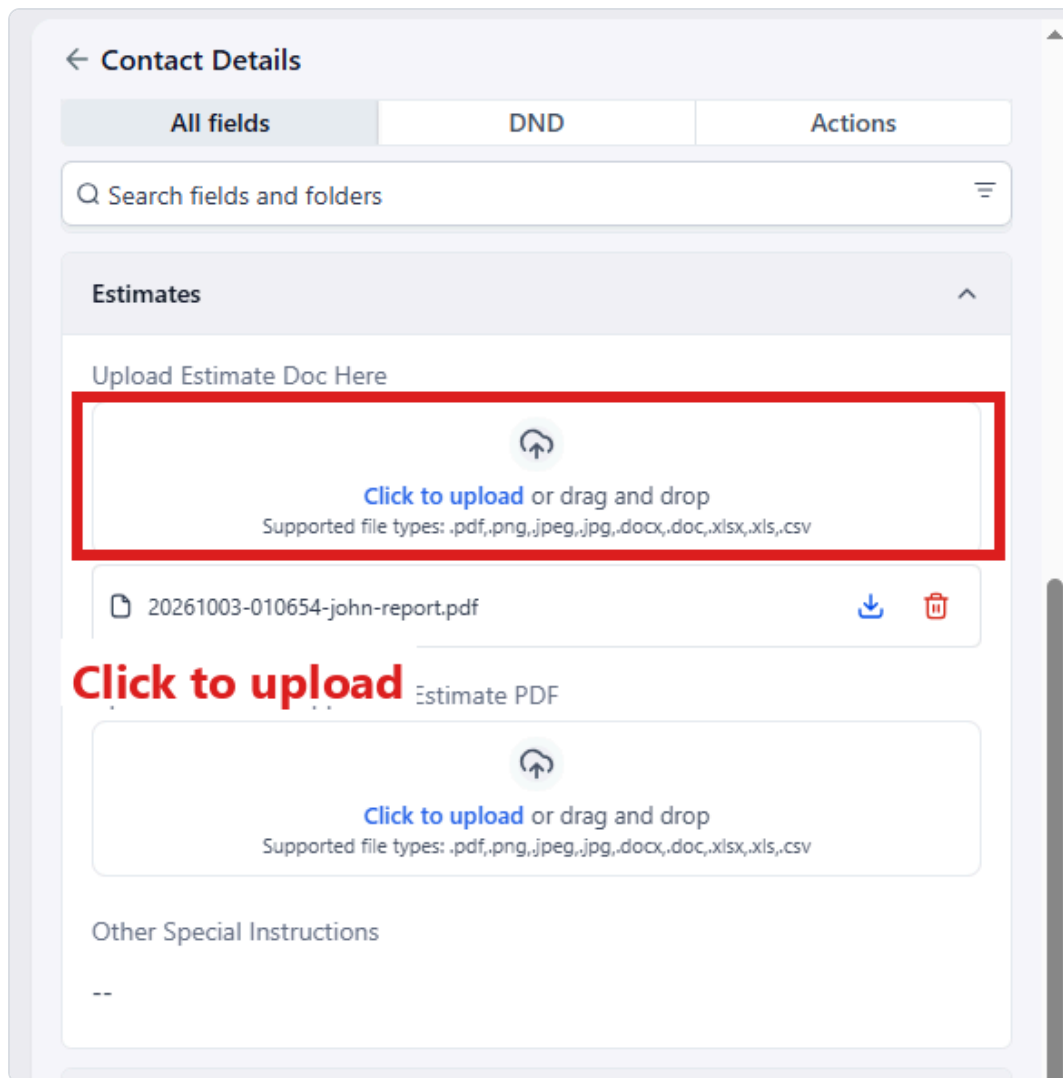
Answers: where do I upload my report? how do I send the range? how do I resend a corrected range? what if I already sent the range myself?

You write the valuation in RTAflow, upload the PDF, type your numbers and set **Send range** to **Send it now**. pdrOS emails and texts the customer the range with the agreement link, and reminds them.

Upload your report

You can also start from the task **Documents in · value it · NAME**. 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 start at step 4.

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 **Estimates** and click the folder's name to open it.
5. In **Upload Estimate Doc Here** ✕, click **Click to upload**, pick your report PDF on your computer and click **Open**.
6. Click the blue **Save** button at the bottom of the left side. Nothing happens until you click it.
7. In the left menu, click **Tasks**.
8. Click the row of the task **Documents in · value it · NAME**. If the task is already gone when you come back, pdrOS closed it because the step happened.
9. Click **Open Full View**.
10. Click the green **Mark Complete** button at the bottom right.



Picture: Folder Estimates open: Click to upload in Upload Estimate Doc Here circled.

Within a minute: the case moves to **1.3 Report written**, Case status changes to "Our report is written. John Hayduk is finalizing the range to send you" (what Sarah says if asked), and you get the task **Set the range • NAME**. Nothing is sent to the customer yet.

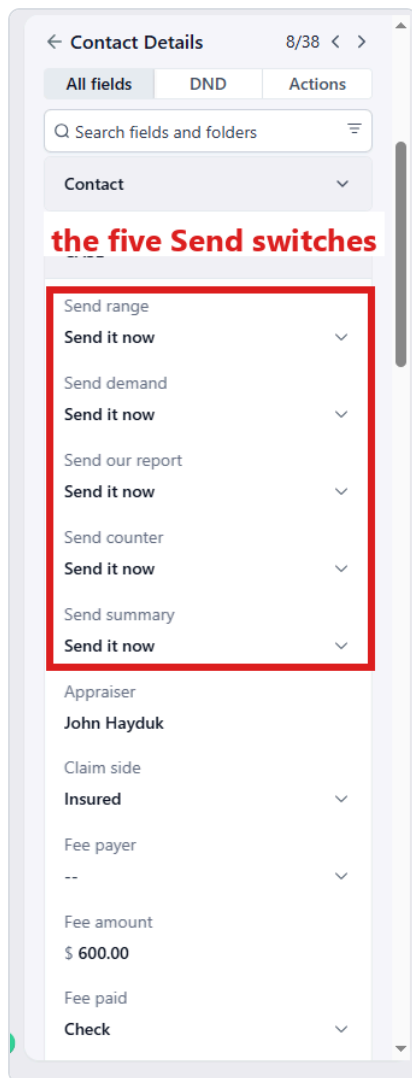
To correct your report, first remove the old file: in **Upload Estimate Doc Here**, click the trash can icon to the right of the file's name. Then upload the new one (steps 1 to 6 again). Nothing is re-sent; every file left in that field goes with your report later.

Set the range

You can also start from the task **Set the range • NAME**. 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 start at step 4.

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

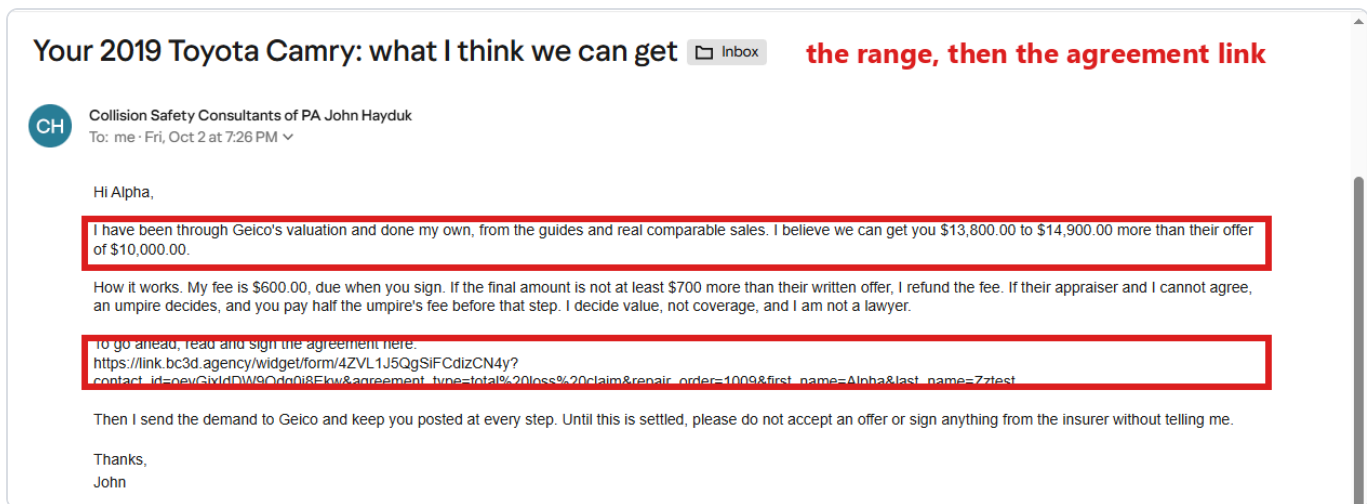
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts in the middle.
4. On the left side of the 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 valuation (numbers only, no dollar sign).
6. On the left side of the contact profile, scroll back up to the folder **CASE** and click the folder's name to open it.
7. Click in the box under **Range low** and type the low figure (numbers only, no dollar sign).
8. Click in the box under **Range high** and type the high figure (numbers only, no dollar sign).
9. Look at **Carrier's offer**, just under **Range high**. If it is empty, click in the box under **Carrier's offer** and type the insurer's offer (numbers only, no dollar sign). It prints in the email.
10. Scroll up to the top of folder **CASE**. **Send range** ✂ comes right after **Case status**, the first field.
11. Click the box under **Send range** and pick **Send it now** from the list.
12. Click the blue **Save** button at the bottom of the left side. Nothing is sent until you click it.
13. In the left menu, click **Tasks**.
14. Click the row of the task **Set the range · NAME**. If the task is already gone when you come back, pdrOS closed it because the step happened.
15. Click **Open Full View**.
16. Click the green **Mark Complete** button at the bottom right.



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

What the customer gets, within a minute

- A text: "John Hayduk has emailed you the valuation and our agreement. To go ahead, sign with the link in my next text".
- The agreement link, in its own text.
- The email "Your [vehicle]: what I think we can get", with your low and high figures and the insurer's offer.



Picture: The valuation email as the customer sees it.

The case moves to **1.4 Range sent**. The invoice comes later, when they sign.

If the range will not send

Send range comes back **Not sent (see task)** when **Range low** or **Range high** is empty, or the case is not a total loss or diminished value. If the type is wrong, fix it first: see [Wrong type](#). If a number is missing:

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 in the box under **Range low** and type the low figure (numbers only, no dollar sign).
6. Click in the box under **Range high** and type the high figure (numbers only, no dollar sign).
7. Click the blue **Save** button at the bottom of the left side.
8. Wait one minute.
9. Scroll up to the top of folder **CASE**.
10. Click the box under **Send range** and pick **Send it now** from the list.
11. Click the blue **Save** button at the bottom of the left side.
12. In the left menu, click **Tasks**.
13. Click the row of the task that came with the refusal (**A Send switch could not act • NAME**). If the task is already gone when you come back, pdrOS closed it because the step happened.
14. Click **Open Full View**.

15. Click the green **Mark Complete** button at the bottom right.

Sending a corrected range

Change the number, then set **Send range** to **Send it now** again. The texts and email go again with the new figures.

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. If your valuation changed: on the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it. (If only the range changed, skip to step 6.)
5. Click in the box under **My number** and type the new figure (numbers only, no dollar sign).
6. Scroll up to the folder **CASE** (just above **CARRIER & APPRAISER**; scroll down to it if you skipped steps 4 and 5) and click the folder's name to open it.
7. Click in the box under **Range low** or **Range high** and type the new figure (numbers only, no dollar sign).
8. Click the blue **Save** button at the bottom of the left side.
9. Scroll up to the top of folder **CASE**.
10. Click the box under **Send range** and pick **Send it now** from the list.
11. Click the blue **Save** button at the bottom of the left side.

If you already sent the range yourself

pdrOS records the date, moves the case to **1.4 Range sent** and starts the reminders, and sends nothing.

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. At the top of the folder, click the box under **Send range** and pick **I sent it myself** from the list.
6. Click the blue **Save** button at the bottom of the left side.
7. In the left menu, click **Tasks**.
8. Click the row of the task **Set the range · NAME**. If the task is already gone when you come back, pdrOS closed it because the step happened.

9. Click **Open Full View**.
10. Click the green **Mark Complete** button at the bottom right.

The reminders

- **Day 3** after the range, no signature: a text ("Any questions about John Hayduk's valuation? When you're ready to go ahead, the agreement link is in my next text") and the link again.
- **Day 7**: the task **Range not answered • call NAME**. Call them, then mark the task complete (steps below).

The reminders stop the moment they sign.

To mark the task complete:

1. In the left menu, click **Tasks**.
2. Click the task's row (click **Due Today** or **Overdue** at the top if you do not see it).
3. Click **Open Full View**.
4. 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 habit

Send the range from pdrOS only. Do not also send RTAflow's range and payment links, or the customer gets two sets of links and two invoices.

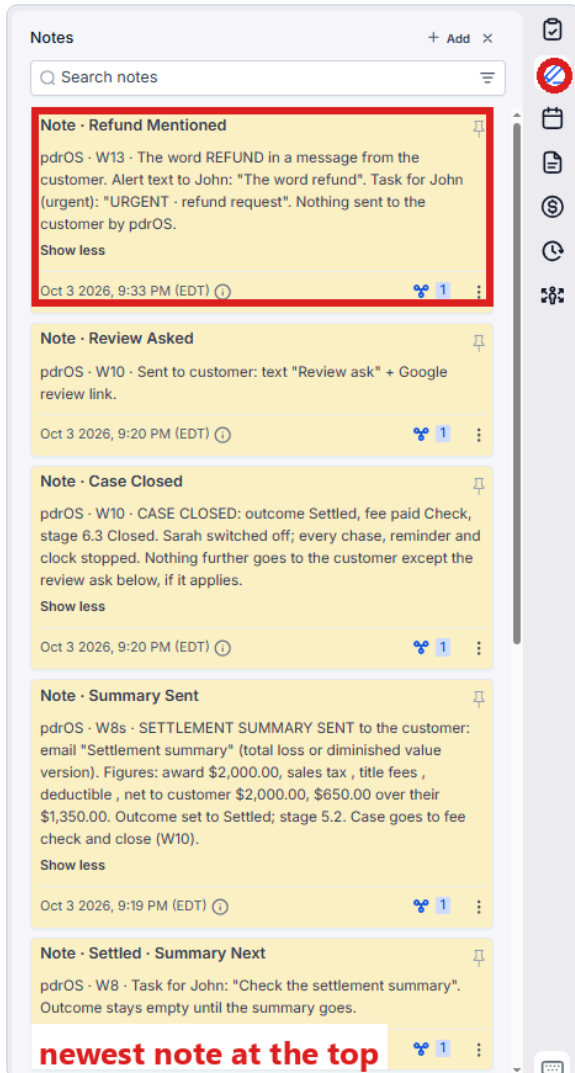
If something looks wrong

If Send range comes back "Not sent (see task)": follow the steps under **If the range will not send**, higher up on this page.

If nothing happened two minutes after the upload, then check the file went into **Upload Estimate Doc Here** (folder **Estimates**). Check too that you clicked the blue **Save** button:

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. Look in **Upload Estimate Doc Here**: your report's file name should show there. If it does not, click **Click to upload**, pick your report and click **Open**.
6. If a blue **Save** button shows at the bottom of the left side, click it.
7. 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.
8. The top note says "Report in" when it worked.



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

Step 3: the agreement and the fee

Answers: how does the customer sign? when does the invoice go? what if the fee is not \$600 or the shop pays?
how do I send a custom invoice? where is the signed agreement?

The customer signs on their phone from the link. pdrOS records the signature, invoices the \$600 through Square by text and email, texts you, and gives you the Send the demand task.



The screenshot shows a mobile app interface for Collision Safety Consultants of PA. At the top is the company logo, a green circle with a white cross and the text 'COLLISION SAFETY CONSULTANTS' around it. To the right of the logo is the company name 'COLLISION SAFETY CONSULTANTS OF PA' in bold, with 'OF PA' in green. Below the name is the tagline 'Auto damage appraisal for vehicle owners and collision repair shops'. The main heading is 'Appraisal Agreement'. Below this is contact information: 'john@collisionsafetyconsultantspa.com', 'Office: (610) 500-4438', and 'Office: 101 Woodbine Rd, Unit 2213, Downingtown, PA 19335'. A grey bar labeled 'Customer Information' is followed by fields for 'Customer First Name' (filled with 'Delta') and 'Customer Last Name' (filled with 'Zztest'). Below these is a red box containing the text 'type, VIN, vehicle; signature further down'. Inside the red box are three fields: 'Agreement type *' (a dropdown menu showing 'post-repair inspection'), 'VIN *' (filled with '4Y1SL65848Z411439'), and 'Vehicle Year / Make / Model *'.

COLLISION SAFETY CONSULTANTS OF PA
Auto damage appraisal for vehicle owners
and collision repair shops

Appraisal Agreement

john@collisionsafetyconsultantspa.com
Office: (610) 500-4438
Office: 101 Woodbine Rd, Unit 2213, Downingtown, PA 19335

Customer Information

Customer First Name
Delta

Customer Last Name
Zztest

type, VIN, vehicle; signature further down

Agreement type *
post-repair inspection

VIN *
4Y1SL65848Z411439

Vehicle Year / Make / Model *

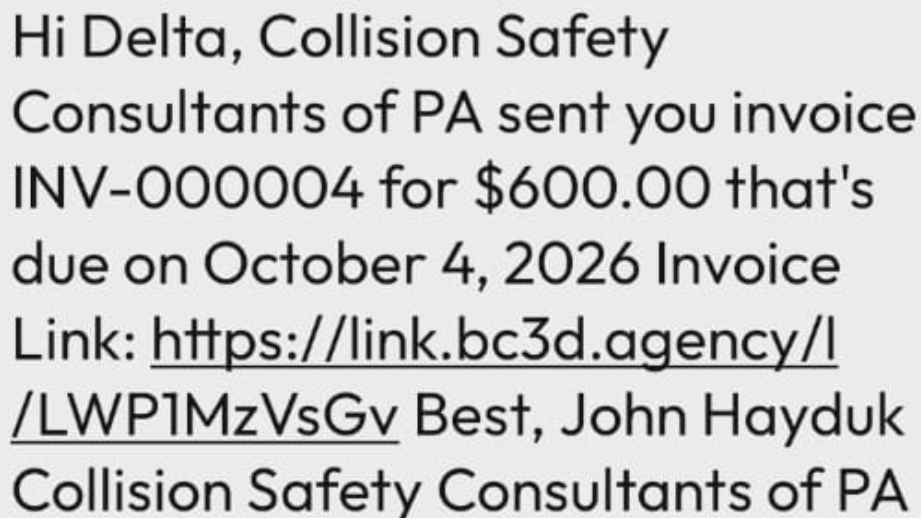
Picture: The agreement page on a customer's phone: VIN, vehicle, signature box.

What the customer does

They open the agreement link and read the agreement for their case type (the short version at the top, the full wording below). They check the **VIN** and **Vehicle Year / Make / Model**, type their name, sign with a finger and submit. It takes two minutes.

What happens, within a minute

1. **Agreement signed date** (folder **CASE**) is written and the case is marked hired.
2. The signed agreement PDF is saved in **Repair Authorization Form PDF** (folder **FORM | Repair Authorization**). It carries your logo, the case type, the RO number (your case number), the wording for that type and their signature.
3. Your phone: "NAME signed the [type] agreement (case #N). The fee invoice is going out."
4. The case moves to **1.5 Hired**; Case status changes to "Agreement signed. We are preparing the demand to [insurer]."
5. You get the task **Send the demand · NAME**. You mark it complete after you send the demand ([Step 4](#)).
6. The fee: see below.



Hi Delta, Collision Safety
Consultants of PA sent you invoice
INV-000004 for \$600.00 that's
due on October 4, 2026 Invoice
Link: [https://link.bc3d.agency//
/LWP1MzVsGv](https://link.bc3d.agency//LWP1MzVsGv) Best, John Hayduk
Collision Safety Consultants of PA

Picture: The Square invoice text with the link, on a customer's phone.

INVOICE

Collision Safety Consultants of PA

(610) 500-4438

101 Woodbine Rd, Unit 2213, Downingtown, PA
19335

Billed to

Delta Zztest
(817) 865-8567
music.brand@yahoo.com
United States

Invoice No INV-000004

Issue Date October 3, 2026

Due Date October 4, 2026

ITEM NAME	SUBTOTAL
Appraisal fee \$600.00 x 1	\$600.00
Subtotal	\$600.00
Amount Due (USD)	\$600.00

Picture: The invoice page the link opens, on the customer's phone.

The fee

What the contact profile says	What pdrOS does
Fee amount \$600 and Fee payer Owner (folder CASE ; the normal case)	Sends the Square invoice "Appraisal fee" for \$600 by text and email, due the next day.
Inspection location Travel (folder SHORT PAY & INSPECTION)	The invoice is "Appraisal fee + travel", \$1,200.
Any other Fee amount (folder CASE)	No automatic invoice. Task Send a custom invoice · NAME : send it by hand from Invoices (steps below).
Fee payer Shop (folder CASE)	No invoice to the customer. Task Invoice the shop · NAME (steps below).

Card payments run through Square, connected with us on your first day. If a card payment ever fails, tell us (in the left menu, click **Support**, then the orange **Support Ticket** button). When a Square invoice is paid by card, pdrOS sets **Fee paid** (folder **CASE**) to Square for you and texts you. Venmo and checks you record yourself (see [Fee and close](#)).

Sending a custom invoice, or invoicing the shop

Do this when you get the task **Send a custom invoice · NAME** or **Invoice the shop · NAME**.

First, look up the 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. Read the amount in **Fee amount**. You only looked, so there is nothing to save.

Then make the invoice:

1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Click the blue **+ New** button at the top right, then **New Invoice**.
3. Under **Customer Information**, click the box **Select Customer**, type the customer's last name and click their name (for a shop, type the shop's name).
4. Under **Add Products**, click **+ Add Product** and pick **Appraisal fee**.
5. Click in the **Price** box on that line and type the fee (numbers only, no dollar sign).
6. Click the blue **Send** button at the top right.
7. A window asks how to send it. Choose email and text, then click its send button.
8. In the left menu, click **Tasks**.
9. Click the row of the task **Send a custom invoice · NAME** (or **Invoice the shop · NAME**). If the task is already gone when you come back, pdrOS closed it because the step happened.
10. Click **Open Full View**.
11. Click the green **Mark Complete** button at the bottom right.

Back New Invoice 11 / 100 Save Send

Connect at least one payment gateway to start receiving payments

Integrate Payment Gateway

Business & Customer Information
Add your business and the customer information to this template

Business Information
Collision Safety Consultants of PA
https://collisionsafetyconsultantspa.com

Customer Information
Select Customer

1 Select Customer

☐ Link Opportunity

Invoice Settings
Add invoice number and dates

Invoice Number * Issue Date * Due Date *

INV- 000006 2026-10-04 2026-10-18

Add Products
Choose products from your catalogue or add new products to this invoice ☐ Enable Tax Automatically

Item	Price	Quantity	Tax	Subtotal
Add products to your Invoice				
+ Add Product				

2 + Add Product, then type the fee in Price

3 blue Send

INVOICE
Collision Safety Consultants of PA
+16103007585
101 Woodbine Rd, Unit 2213
Downtown, PA
19335
US
https://collisionsafetyconsultantspa.com

Billed to Invoice Number INV-000006 Issue Date October 4, 2026 Due Date October 18, 2026

ITEM NAME	PRICE	QUANTITY	TAX	SUBTOTAL
Subtotal				\$0.00
Amount Due (USD)				\$0.00

Picture: A new invoice: the Select Customer box, + Add Product and the blue Send button circled.

Invoices
Create and manage all invoices generated for your business

Settings + New

+ New, then New Invoice start receiving payments

Integrate Payment Gateway

0 Invoice(s) in Draft \$0.00

2 Invoice(s) in Due \$1,200.00

0 Invoice(s) received \$0.00

2 Invoice(s) Overdue \$1,800.00

New Invoice
Send a one-time invoice to the customer right away.

New Recurring Invoice
Send a recurring invoice to the customer at scheduled intervals.

Import Invoices using CSV
Import existing invoices from other softwares

Picture: Invoices: the blue + New button and its menu, New Invoice circled.

If they sign twice

A second signature changes nothing: one note, no second invoice.

When the customer is with you

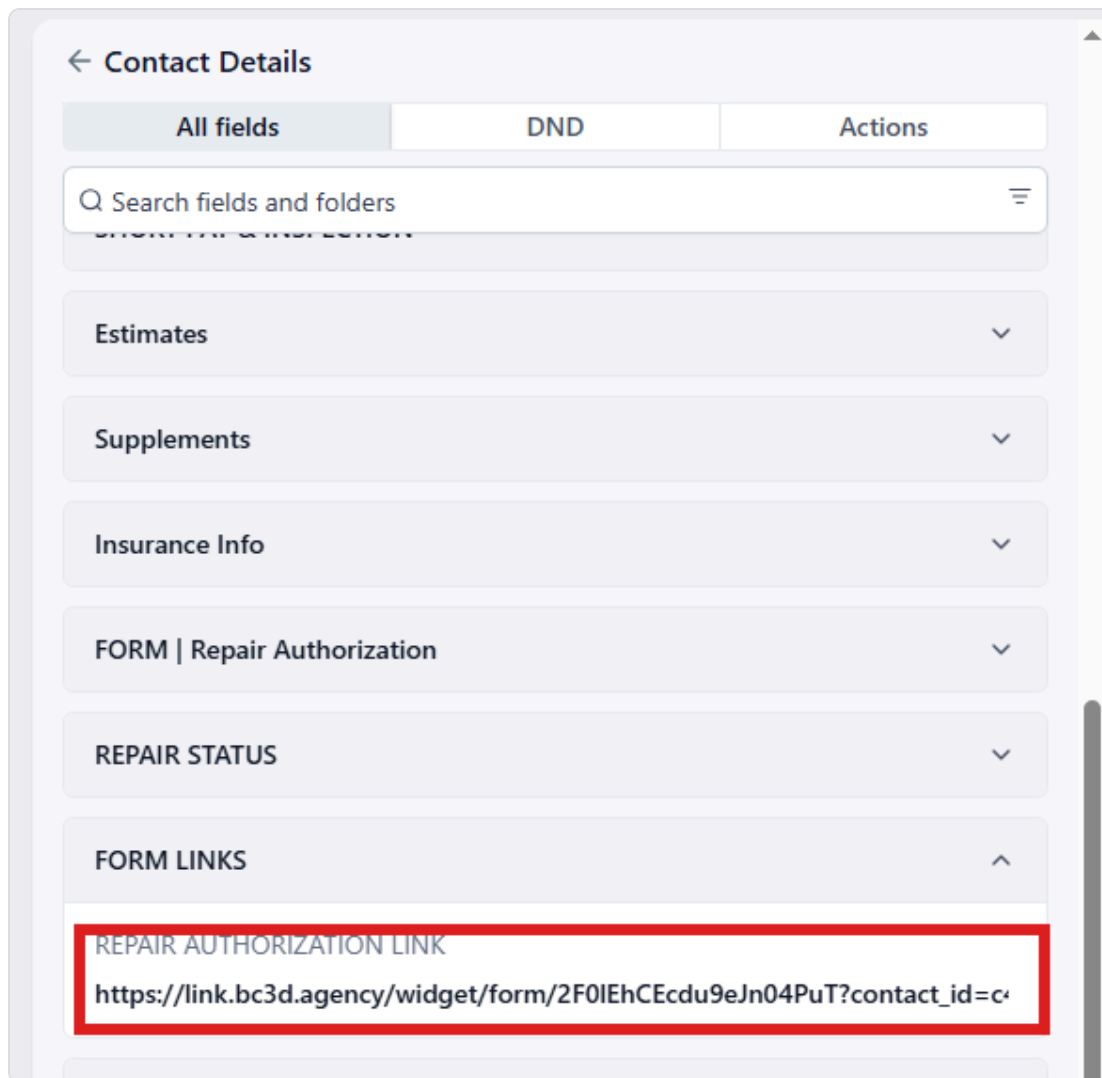
If a customer is with you (an inspection, a visit), open their agreement link on your computer and let them sign on your screen.

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 **FORM LINKS** and click the folder's name to open it.
5. Click in the box under **REPAIR AUTHORIZATION LINK**. Do not type anything in this box; you are only copying.
6. Press **Ctrl** and **A** together to select the whole link (on a Mac, **Cmd** and **A**).
7. Press **Ctrl** and **C** together to copy it (on a Mac, **Cmd** and **C**).
8. Press **Ctrl** and **T** together (on a Mac, **Cmd** and **T**). A new browser tab opens.
9. Click in the address bar at the top of the browser.
10. Press **Ctrl** and **V** together to paste the link (on a Mac, **Cmd** and **V**).
11. Press **Enter**. The agreement opens.
12. Turn the screen to the customer and let them read, sign and submit.

If a blue **Save** button appeared at the bottom of the left side after step 5, you changed the link by mistake: do not click it. Click **Cancel** next to the blue **Save** button; the field goes back to what it was.

You only copied a link, so there is nothing to save. The same link is also in their texts, in the middle of their contact profile (and under **Conversations** in the left menu).



Picture: Folder FORM LINKS open: REPAIR AUTHORIZATION LINK circled.

Your copy of the signed agreement

1. In the left menu, click **RO Hub**.
2. 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**.
3. Click the small **Docs** button, to the right of the **Contacts** button. A window lists the case's documents.
4. Click **Repair Authorization Form**. The signed agreement opens in a new browser tab.

the signed agreement: customer, vehicle, VIN; signature and date

Customer Information		
Customer First Name Charlie	Customer Last Name Zziest	
Phone # (817) 865-8567	Email Address music.brand@yahoo.com	
Vehicle Year / Make / Model 2022 Honda Accord		
VIN 1HGCMBH2633A004352		
Insurance Info		
Insurance Company State Farm	Claim #	
Policy #	Deductible	Date of Loss

Appraisal Services Agreement — Repair Short Pay

In short

- You hire me to write an independent repair estimate and press the insurer to pay for a proper repair; my fee is \$600, due now.
- You, the vehicle owner, are my client; the repair shop helps with documents but is not a party.
- The insurer decides what it pays; I do not promise an amount on a short pay.
- If appraisal is invoked and the appraisers cannot agree, an umpire decides; you pay half the umpire's fee before that step.
- I am a licensed appraiser, not a lawyer or a public adjuster.

The full agreement below is what you are signing.

This agreement is between you, the owner of the 2022 Honda Accord, and Collision Safety Consultants of PA (John Hayduk Jr.), 101 Woodbine Rd. Unit 2213, Downingtown, PA 19335, (610) 500-4438. Your vehicle is being repaired at Zziest Body Shop, and the insurer handling the claim, State Farm, has approved less than the cost of a proper repair.

What I will do. I will review the repair facility's estimate, the insurer's estimate, the invoices and the photographs, prepare an independent estimate of the repairs the vehicle needs at the facility's rates, including operations the insurer's estimate left out, and present it to the insurer's appraiser as a supplement on your behalf. If your claim is with your own insurer and your policy has an appraisal provision, you appoint me as your appraiser under it, and I may invoke appraisal in your name if the insurer will not agree; if the claim is against another driver's insurer, I will present it as a demand. I will negotiate the difference with the insurer's appraiser and keep you informed of every offer.

Who my client is. You, the vehicle owner, are my client. I act on your instructions and report to you. With your permission I will exchange documents and photographs with the repair facility so the estimate is complete, but the facility is not a party to this agreement and does not direct my work.

No guaranteed result. The insurer decides what it will pay; I will tell you honestly what I believe the repair is worth and what I believe can be recovered, and I do not promise a particular amount.

Umpire, if appraisal is invoked. Under an appraisal provision the umpire's fee is shared equally between you and your insurer; your share is payable before the case goes to the umpire, and I will not release my findings to the umpire until my fee and your share of the umpire's fee have been paid.

Payment. My fee is \$600, due when you sign this agreement, by Square, Venmo or check. Except where this agreement says otherwise, the fee is earned when the work described above begins and is not refundable.

What you agree to do. You will give me the documents and information I ask for as soon as you can, tell me about every contact you receive from the insurer or its representatives, and not accept an offer, sign a release or settle the claim without telling me first. You confirm that you own the vehicle or have the owner's authority to act, and that the information you give me is true.

What I am, and what I am not. I am a motor vehicle physical damage appraiser licensed by the Pennsylvania Insurance Department. I am not an attorney and I do not give legal advice, represent you in court or before any agency, or act as a public adjuster. Nothing in this agreement is a promise about what an insurer, an umpire, a court or a repair facility will decide. If a question of law comes up, I will tell you to consult an attorney.

Confidentiality and use of my work. My reports and valuations are prepared for you and for use in your claim. You may share them with the insurer, an umpire, a court or an attorney handling your matter. I keep your information confidential except as needed to do this work.

Communications. You agree that Collision Safety Consultants of PA may contact you about this matter by phone, text message and email at the numbers and address you provided. Reply STOP to any text to end text messages.

Limit of responsibility. My responsibility to you under this agreement is limited to the fee you paid me. I am not responsible for delays or decisions by insurers, umpires, courts, repair facilities or other parties.

Ending this agreement. Either of us may end it by written notice. If you end it, or settle without telling me, the fee remains earned. If I end it for a reason other than your breach, I will refund the fee.

Entire agreement; Pennsylvania law; electronic signature. This is our whole agreement about this matter; it can be changed only in writing signed by both of us. Pennsylvania law governs it. You agree that signing electronically has the same effect as signing on paper, and that a copy is as good as the original.

Printed Name Charlie Zziest	Signature Date 10/03/2026
Signature	

Picture: The signed agreement PDF, first page, opened from the Docs window.

The unsigned inspection

On an inspection, pdrOS asks the customer to sign when they book and again the day before. If they still have not signed one hour before the visit, your phone gets a text with their agreement link. Let them sign on your phone when they arrive.

Step 4: the RTA (the demand for appraisal)

Answers: how do I send the RTA? where do I put the claim number, the date of loss and the adjuster? what does the adjuster receive? what is Clock A?

You make the RTA in RTAflow, upload it, type the claim number and the adjuster's details, and set **Send demand** to **Send it now**. pdrOS emails the adjuster as you with the RTA and the signed agreement, texts the customer, and starts Clock A.

Before you send

Send demand needs these five things on the contact profile, in four folders: - **RTA or demand PDF** (folder **CASE**): your RTA uploaded. - **Claim #** (folder **Insurance Info**) filled. - **Date of Loss** (folder **FORM | Repair Authorization**) filled. - A valid **Adjuster email** (folder **CARRIER & APPRAISER**). Fill **Adjuster name** in the same folder too, if you have it. - The signed agreement: **Agreement signed date** (folder **CASE**) filled. pdrOS writes it when the customer signs; if it is empty, send them their agreement link again. It is filled if you have the Send the demand task.

To fill and check them:

You can also start from the task **Send the demand · NAME**. 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 start at step 4.

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 **Insurance Info** and click the folder's name to open it.
5. Look at **Claim #**. If it is empty, click in the box under **Claim #** and type the claim number.
6. On the left side of the contact profile, scroll down to the folder **FORM | Repair Authorization** and click the folder's name to open it.
7. Look at **Date of Loss**. If it is empty, click the box under **Date of Loss** and pick the accident day in the calendar that opens.
8. On the left side of the contact profile, scroll up to the folder **CASE** and click the folder's name to open it.
9. In **RTA or demand PDF**, click **Click to upload**, pick your RTA on your computer and click **Open**.

10. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it.
11. Look at **Adjuster name**. If it is empty, click in the box under **Adjuster name** and type the adjuster's name.
12. Look at **Adjuster email**. If it is empty or wrong, click in the box under **Adjuster email** and type the adjuster's email.
13. Click the blue **Save** button at the bottom of the left side.

← Contact Details

All fields DND Actions

Q Search fields and folders

OUTCOME

SHORT PAY & INSPECTION

Estimates

Supplements

Insurance Info

Insurance Company
Allstate

Deductible
\$

Claim #
ALL-TEST-002

Picture: Folder Insurance Info open: Claim # circled.

← Contact Details

All fields DND Actions

Q Search fields and folders

FORM | Repair Authorization

Update Repair Authorization PDF Link

--

Repair Authorization Form PDF

<https://cmnqwtgmcjoajytdnzb.supabase.co/storage/v1/object/public/docun>

VIN

1HGCM82633A004352

Date of Loss

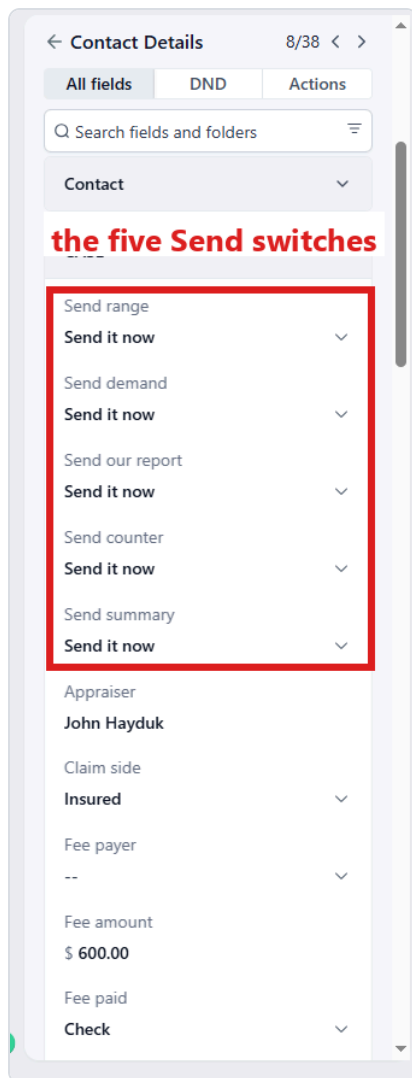
📅 Aug 15, 2026

Picture: Folder FORM | Repair Authorization open: Date of Loss circled.

Send it

If you closed the contact profile, open it again: in the left menu, click **Contacts**, type the customer's last name or RO number in the search box at the top of the list, and 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 left side of the contact profile, scroll up to the folder **CASE** (just above **CARRIER & APPRAISER**; if you just opened the profile again, scroll down to it). If it is closed, click the folder's name to open it.
2. Look at the top of folder **CASE**, where the Send switches are.
3. Click the box under **Send demand** ⚡ and pick **Send it now** from the list.
4. Click the blue **Save** button at the bottom of the left side. Nothing is sent until you click it.
5. In the left menu, click **Tasks**.
6. Click the row of the task **Send the demand • NAME**. If the task is already gone when you come back, pdrOS closed it because the step happened.
7. Click **Open Full View**.
8. Click the green **Mark Complete** button at the bottom right.



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

What happens, within a minute

1. The adjuster gets an email from you: "Demand for appraisal · NAME · claim X", naming you as the customer's appraiser, with the RTA and the signed agreement attached.
2. pdrOS makes a contact profile for that adjuster (their own name, their own conversation). Their reply will land there, and you get a text when it does.
3. **RTA or demand sent date** (folder **CARRIER & APPRAISER**) is written; **Send demand** reads **Sent**; the case moves to **3.1 RTA or demand sent**.
4. The customer gets a text: "the demand for appraisal went to [insurer] today. Their appraiser should contact John Hayduk within 7 to 10 business days; we'll keep you posted."
5. **Clock A** starts.

Clock A: waiting for their appraiser

- **Day 10 after the RTA (about seven business days)**, no contact date picked: your phone gets "no contact from [insurer]'s appraiser in 7 business days on NAME" and the task **No contact in 7 business days · call the carrier · NAME**. Call the carrier, then mark the task complete (steps below).
- **Day 17**: the task **Still no contact after 17 days · NAME**. Call the carrier again and push for their appraiser; ask for the adjuster's supervisor if you need to. Then mark the task complete (steps below).

To mark one of these tasks complete:

1. In the left menu, click **Tasks**.
2. Click the task's row (click **Due Today** or **Overdue** at the top if you do not see it).
3. Click **Open Full View**.
4. 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.

Clock A stops the moment you pick a day in **Other appraiser contact date** (folder **CARRIER & APPRAISER**; next step).

If it will not send

Not sent (see task): the  **Demand not sent** task names what is missing (the PDF, the signed agreement, the claim number, the date of loss, or "no valid email for the adjuster"). Fix it, wait a minute, set the switch again. That task closes itself when the email goes.

1. In the left menu, click **Tasks**.
2. Click the row of the task  **Demand not sent**. A short preview opens under it.
3. Click **Open Full View** and read what is missing.
4. Click the link under **WHERE**. 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.
5. On the left side of the contact profile, scroll down to the folder that holds what is missing and click the folder's name to open it:
6. **Claim #**: folder **Insurance Info**. Click in the box under **Claim #** and type the claim number.
7. **Date of Loss**: folder **FORM | Repair Authorization**. Click the box under **Date of Loss** and pick the day in the calendar that opens.
8. **RTA or demand PDF**: folder **CASE**. In **RTA or demand PDF**, click **Click to upload**, pick your RTA and click **Open**.

9. **Adjuster email:** folder **CARRIER & APPRAISER**. Click in the box under **Adjuster email** and type the email.
10. The signed agreement: only the customer can supply it, by signing ([Step 3](#)).
11. Click the blue **Save** button at the bottom of the left side.
12. Wait one minute.
13. On the left side of the contact profile, scroll to the folder **CASE** and click the folder's name to open it.
14. At the top of the folder, click the box under **Send demand** and pick **Send it now** from the list.
15. Click the blue **Save** button at the bottom of the left side.

The  task closes itself when the email goes.

Sending again

- Setting **Send demand** again right after it went sends nothing (the ten-minute guard) and the switch returns to Sent.
- Setting it again later is refused: "it already went on [date]". To send a corrected RTA, clear **RTA or demand sent date**, click the blue **Save** button, wait one minute, then set **Send demand** to **Send it now** 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 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.
- On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it.
- In **RTA or demand PDF**, remove the old RTA first: click the trash can icon to the right of the file's name. Every file left in that field goes with the email.
- In **RTA or demand PDF**, click **Click to upload**, pick the corrected RTA on your computer and click **Open**.
- On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it.
- Click in the box under **RTA or demand sent date**. 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.
- Click the blue **Save** button at the bottom of the left side.
- Wait one minute.
- On the left side of the contact profile, scroll back up to the folder **CASE**.

- At the top of the folder, click the box under **Send demand** and pick **Send it now** from the list.
- Click the blue **Save** button at the bottom of the left side.

If you sent the RTA yourself

The date is written, the customer is texted and Clock A starts; no email goes.

You can also start from the task **Send the demand • NAME**. 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 start at step 4.

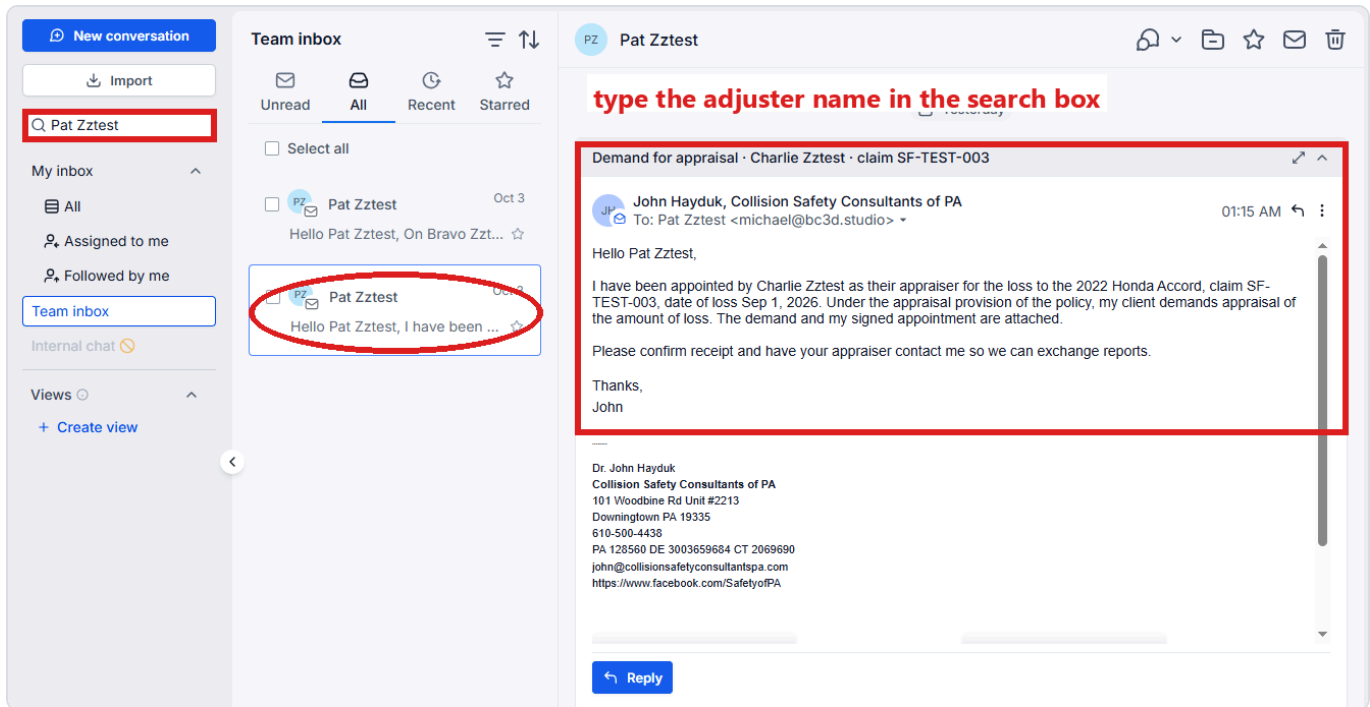
1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts 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. At the top of the folder, click the box under **Send demand** and pick **I sent it myself** from the list.
6. Click the blue **Save** button at the bottom of the left side.
7. In the left menu, click **Tasks**.
8. Click the row of the task **Send the demand • NAME**. If the task is already gone when you come back, pdrOS closed it because the step happened.
9. Click **Open Full View**.
10. Click the green **Mark Complete** button at the bottom right.

When the adjuster replies

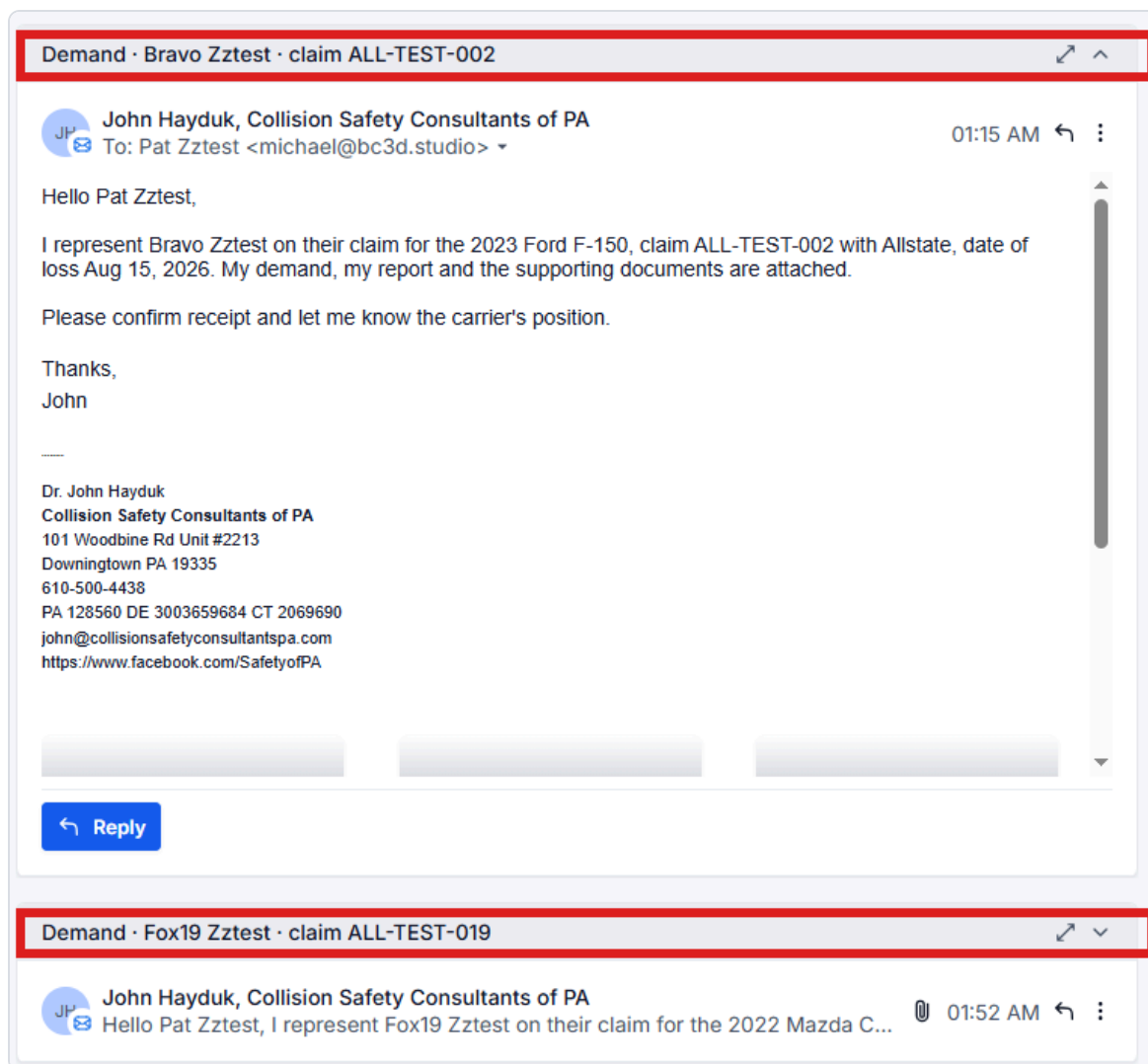
Their email lands in the adjuster's own conversation (not the customer's). Your phone: "Pat Smith replied by email about one of your cases. Open Conversations → Pat to read it." Sarah never answers them. You reply from that conversation:

1. In the left menu, click **Conversations**.
2. At the top of the list of people, click **Unread**.
3. Click the adjuster's name (Pat Smith in the example). Their thread opens in the middle. You are in the right place when you see their email there, under their name, not the customer's.
4. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **Email**.
5. Type a subject in the subject line.

6. Click in the box and type your reply.
7. Click the paper-plane button at the right end to send.



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.

If something looks wrong

If Send demand comes back "Not sent (see task)": follow the steps under **If it will not send**, higher up on this page.

If the switch still reads "Send it now" after five minutes, then pdrOS could not act on it (usually a second try within seconds of a refusal). Set it to **Not sent (see task)**, click the blue **Save** button, wait one minute, then set it back to **Send it now** and click the blue **Save** button again:

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. At the top of the folder, click the box under **Send demand** and pick **Not sent (see task)**. Never pick **I sent it myself** here: that records the email as sent by you.
 6. Click the blue **Save** button at the bottom of the left side.
 7. Wait one minute.
 8. Click the box under **Send demand** again and pick **Send it now**.
 9. Click the blue **Save** button at the bottom of the left side.
 10. In the left menu, click **Tasks**.
 11. Click the row of the task **A Send switch did not go · NAME**. If the task is already gone when you come back, pdrOS closed it because the step happened.
 12. Click **Open Full View**.
 13. Click the green **Mark Complete** button at the bottom right.
-

Other words for this: RTA = right to appraisal, demand for appraisal, the appraisal demand, the appraisal clause letter; the adjuster = the carrier's adjuster, the claims rep.

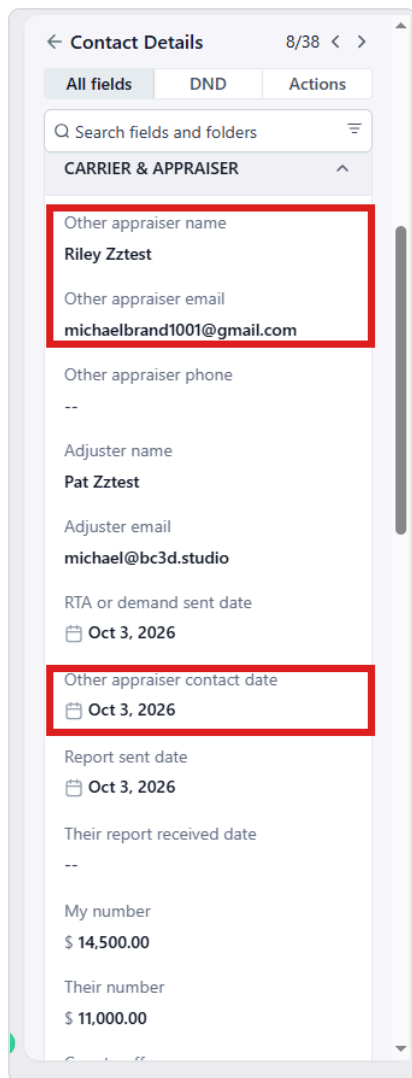
Step 5: the other appraiser and your report

Answers: their appraiser called, what do I type and where? how do I send my report? how long does pdrOS chase their report?

When their appraiser makes contact, you type their details and the date; pdrOS texts the customer and asks you to send your report. You set **Send our report** to **Send it now**; pdrOS emails it as you and chases their report at day 10 and day 17.

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 (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 **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. If you have their phone, click in the box under **Other appraiser phone** and type the number.
8. Click the box under **Other appraiser contact date**  and pick today in the calendar that opens.
9. Click the blue **Save** button at the bottom of the left side. Nothing happens until you click it.



Picture: Folder CARRIER & APPRAISER open: Other appraiser name, Other appraiser email and Other appraiser contact date circled.

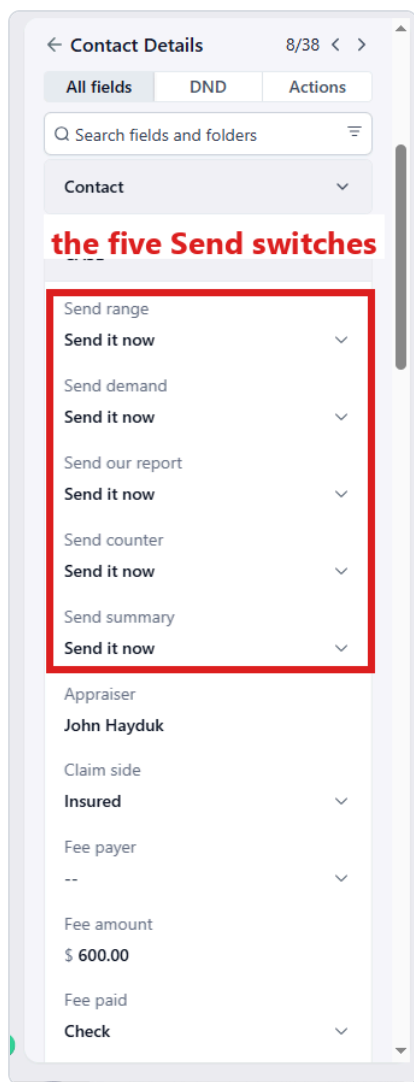
Within a minute: Clock A stops (no day-10 alert will come); the case moves to **3.2 Other appraiser in contact**; the customer gets "[Insurer]'s appraiser is now in contact with John Hayduk. Next the two appraisers exchange reports"; you get the task **Their appraiser is in contact • send our report • NAME**.

Send your report

You can also start from the task **Their appraiser is in contact • send our report • NAME**. 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 start at step 4.

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. At the top of the folder, 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. Nothing is sent until you click it.
7. In the left menu, click **Tasks**.
8. Click the row of the task **Their appraiser is in contact · send our report · NAME**. If the task is already gone when you come back, pdrOS closed it because the step happened.
9. Click **Open Full View**.
10. Click the green **Mark Complete** button at the bottom right.



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

Within a minute, the other appraiser gets an email from you: "My appraisal report · NAME · claim X", with your report attached and, when the case has them, the repair invoice, the two estimate PDFs and the photo report. pdrOS makes a contact profile for that appraiser under their own name; their reply lands in their own conversation and you get a text. The case moves to **3.3 Report out**; Case status changes to the sentence Sarah gives if asked: your report went to their appraiser and you follow up at day ten. Nothing goes to the customer.

Clock B: waiting for their report

- **Day 10**: pdrOS emails them again ("your report, please", with your report attached once more).
- **Day 17**: a second request.
- **Day 22**: your phone gets "day 22 and still no report from [name] on NAME. Two chase emails went" and the task **Day 22 · no report from their appraiser · NAME**: call them, or call the umpire. Then mark the task complete (steps below).

To mark the task complete:

1. In the left menu, click **Tasks**.
2. Click the task's row (click **Due Today** or **Overdue** at the top if you do not see it).
3. Click **Open Full View**.
4. 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.

Every chase stops the moment you upload their report into **Supplement #1 Upload Doc Here** or type **Their number** (next step).

If it will not send

Not sent (see task) means one of three things, and the ⚠ task names which. Your report is not in **Upload Estimate Doc Here** (folder **Estimates**), **Other appraiser email** (folder **CARRIER & APPRAISER**) is empty, or **Claim #** (folder **Insurance Info**) is empty. Fix it, wait a minute, set the switch again:

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. Look at **Claim #**. If it is empty, click in the box under it and type the claim number.
6. Scroll up to the folder **Estimates** and click the folder's name to open it.
7. Look in **Upload Estimate Doc Here**. If your report is not there, click **Click to upload**, pick your report PDF and click **Open**.
8. Scroll up to the folder **CARRIER & APPRAISER** and click the folder's name to open it.
9. Look at **Other appraiser email**. If it is empty, click in the box under it and type their email.
10. Click the blue **Save** button at the bottom of the left side.
11. Wait one minute.
12. 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 are near its top, right after **Case status**.
13. Click the box under **Send our report** and pick **Send it now** from the list.
14. Click the blue **Save** button at the bottom of the left side.

The  **Our report not sent** task that came with the refusal closes itself when the email goes.

If the report went before they called

You can set **Send our report** as soon as you have their email, before the contact date. When you later pick the contact date, your report is not sent again.

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 email** and type their email.
6. Click the blue **Save** button at the bottom of the left side.
7. On the left side of the contact profile, scroll back up to the folder **CASE** and click the folder's name to open it.
8. At the top of the folder, click the box under **Send our report** and pick **Send it now** from the list.
9. Click the blue **Save** button at the bottom of the left side.

If you emailed the report yourself

Set **Send our report** to **I sent it myself**: the date is written and Clock B starts; no email goes.

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. At the top of the folder, click the box under **Send our report** and pick **I sent it myself** from the list.
6. Click the blue **Save** button at the bottom of the left side.
7. In the left menu, click **Tasks**.
8. Click the row of the task **Their appraiser is in contact · send our report · NAME**. If the task is already gone when you come back, pdrOS closed it because the step happened.
9. Click **Open Full View**.
10. Click the green **Mark Complete** button at the bottom right.

If something looks wrong

If your phone gets "no contact from [insurer]'s appraiser in 7 business days" (day 10) after their appraiser did call, then **Other appraiser contact date** is empty. Pick the day and click the blue **Save** button; the clock stops and nothing else is sent.

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 **Other appraiser contact date** ✕ and pick the day their appraiser first called, in the calendar that opens.
6. Click the blue **Save** button at the bottom of the left side.
7. In the left menu, click **Tasks**.
8. Click the row of the task **No contact in 7 business days · call the carrier · NAME**. If the task is already gone when you come back, pdrOS closed it because the step happened.
9. Click **Open Full View**.
10. Click the green **Mark Complete** button at the bottom right.

If the chase emails keep going after their report arrived, then the report was not put in **Supplement #1 Upload Doc Here**, or **Their number** was not typed. Do either; every chase stops at once.

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. Do one of these two.
5. To add their report: scroll down to the folder **Supplements** and click its name. In **Supplement #1 Upload Doc Here** ✕, click **Click to upload**, pick their report PDF and click **Open**.
6. To add their figure: scroll down to the folder **CARRIER & APPRAISER** and click its name. Click in the box under **Their number** ✕ and type their figure (numbers only, no dollar sign).
7. Click the blue **Save** button at the bottom of the left side.

Step 6: negotiation

Answers: their figure came in, what do I do? how do I send a counter? how do I correct a counter? what if I cleared their number by mistake?

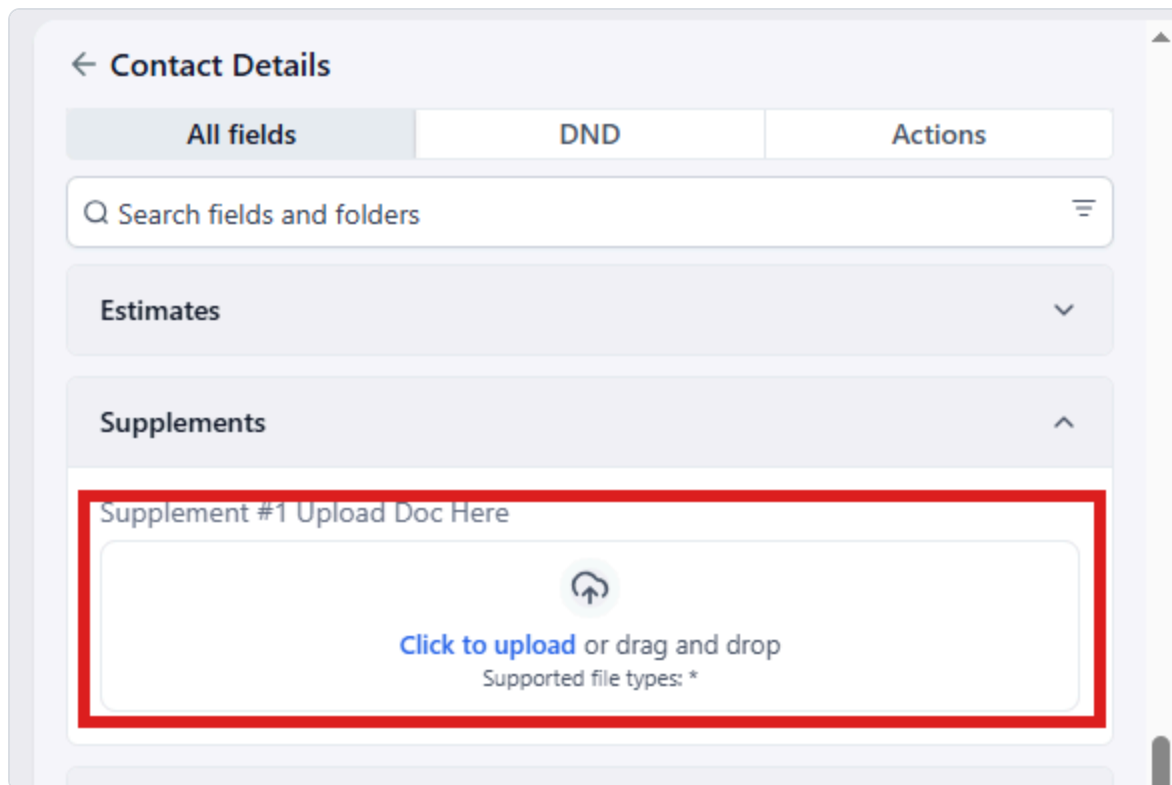
Type their figure (or upload their report), and every chase stops. Type your counteroffer and a one-line note, then set **Send counter** to **Send it now**. pdrOS emails it as you and watches for seven days of silence.

Their answer arrives

Two ways to record it. Either one is enough.

Their report, as a PDF

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 **Supplements** and click the folder's name to open it. (If you already see its fields, it is open: clicking its name again closes it.)
5. In **Supplement #1 Upload Doc Here** ✎, click **Click to upload**.
6. Pick their report on your computer and click **Open**.
7. Click the blue **Save** button at the bottom of the left side.



Picture: Folder Supplements open: Click to upload in Supplement #1 Upload Doc Here circled.

Or their figure

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 **Their number** ✂ and type their figure (numbers only, no dollar sign).
6. Click the blue **Save** button at the bottom of the left side.

← Contact Details

All fields	DND	Actions
Search fields and folders		
CARRIER & APPRAISER		
Other appraiser name		
--		
Other appraiser email		
--		
Other appraiser phone		
--		
Adjuster name		
Pat Zztest		
Adjuster email		
michael@bc3d.studio		
RTA or demand sent date		
📅 Oct 3, 2026		
Other appraiser contact date		
--		
Report sent date		
📅 Oct 3, 2026		
Their report received date		
--		
My number		
\$ 2,700.00		
Their number \$ 1,350.00		
Counteroffer \$ 2,000.00		
Umpire		
--		

Picture: Folder CARRIER & APPRAISER open: Their number and Counteroffer circled.

Can't find a field? Type its name in the search box at the top of the left side (it reads **Search fields and folders**).

Within a minute: every chase and clock stops; the case moves to **4.1 Their report or offer in**; your phone gets "the other appraiser's report is in on NAME. Type Their number when you have read it" or "the other side answered on NAME: \$X. You are at \$Y"; you get the task **Negotiate • NAME**. Nothing goes to the customer.

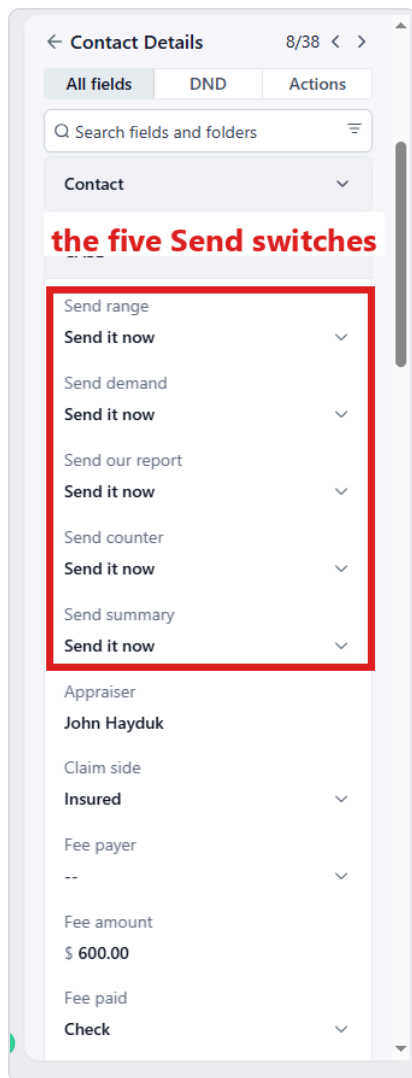
A second copy of their report changes nothing. A new figure later brings "new figure from the other side on NAME: \$X".

Your counter

You work from the task **Negotiate • NAME**.

You can also start from the task. In the left menu, click **Tasks**. Click the row **Negotiate • NAME**, 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 start at step 4.

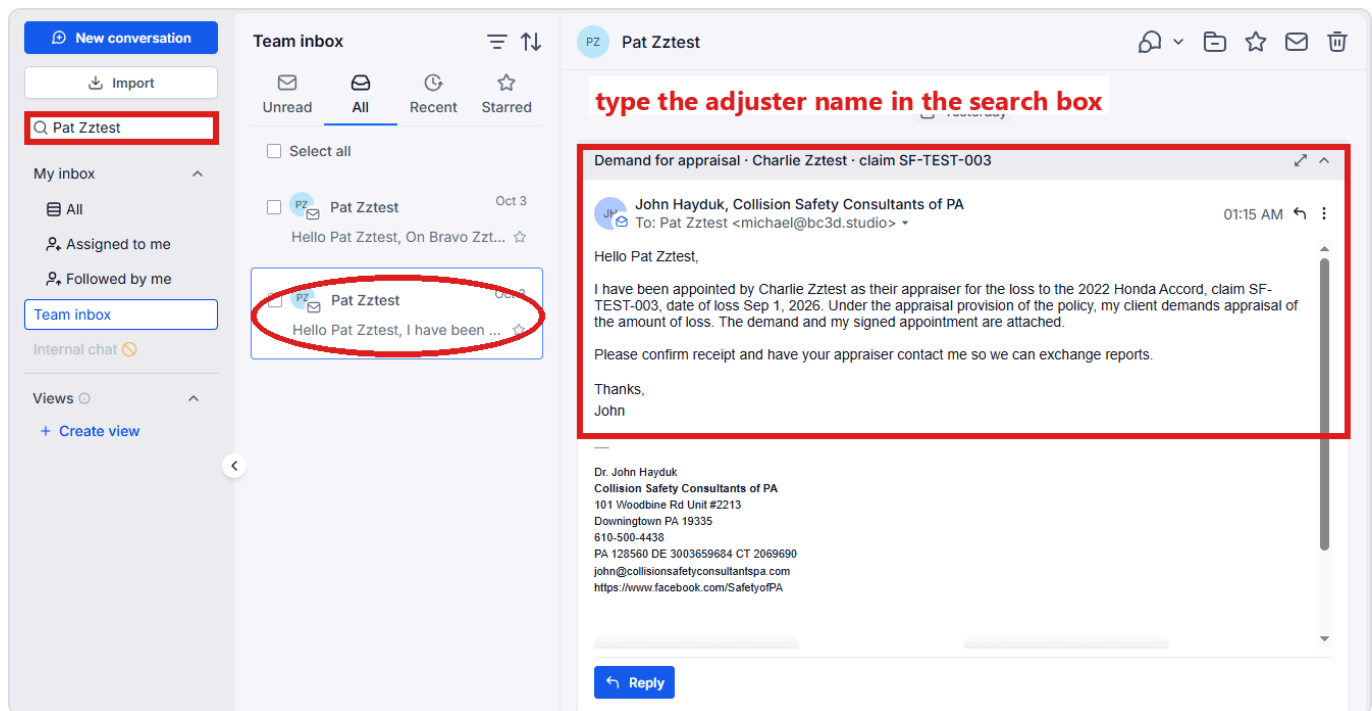
1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the customer's last name or RO number.
3. Click the customer's name in the list. Their contact profile opens. You are in the right place when you see the customer's name at the top left and their texts 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 figure (numbers only, no dollar sign).
6. If you want a line in the email, click in the box under **Negotiation note** and type it ("Comparable sales are in my report.").
7. Click the blue **Save** button at the bottom of the left side.
8. On the contact profile, scroll up to the folder **CASE** (just above **CARRIER & APPRAISER**) and click the folder's name to open it.
9. Look at the top of folder **CASE**, where the Send switches are.
10. Click the box under **Send counter** ⌵ and pick **Send it now** from the list.
11. Click the blue **Save** button at the bottom of the left side.



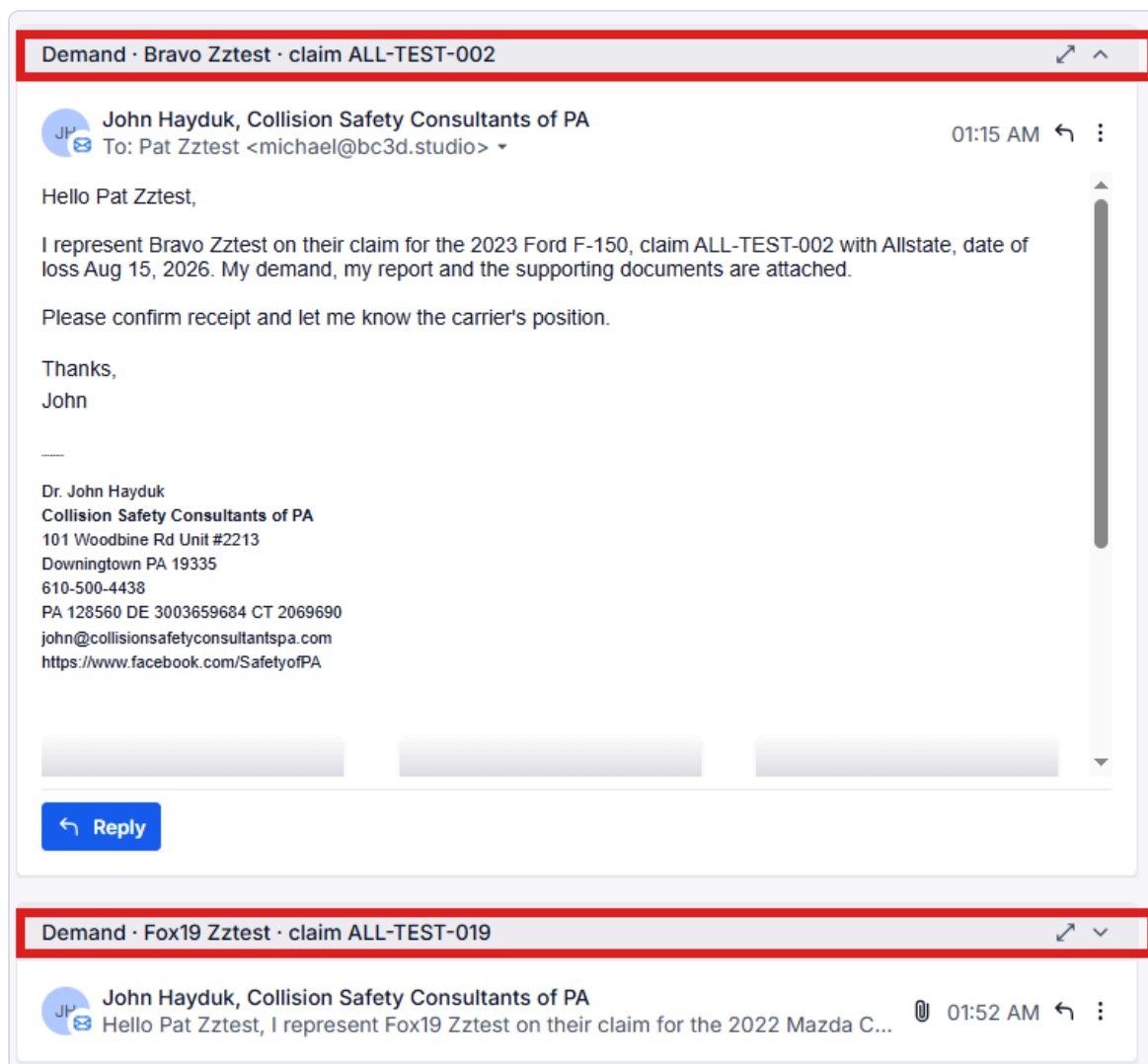
Picture: Folder CASE open: the five Send switches at the top circled.

Within a minute the other appraiser gets an email from you: "On NAME's [vehicle], claim X: you are at \$12,000.00 and my valuation supports \$14,500.00. [Your note]. I can agree today at \$14,200.00."

Counter sent date is written; the case moves to **4.2 Negotiating**; Case status changes to the sentence Sarah gives if asked (we are negotiating; our latest counter went out). Nothing goes to the customer.



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.

Then close the task:

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 row **Negotiate · NAME** (click **Due Today** or **Overdue** at the top if you do not see it). 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.

The silence clock

Seven days after a counter with no new figure: your phone gets "no answer in 7 days to your counter of \$X on NAME" and the task **No answer to your counter in 7 days · NAME**. Call them, or go to the umpire.

To go to the umpire:

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.

What happens next is in [Step 7: the umpire](#).

Whether you called them or went to the umpire, close the task:

1. In the left menu, click **Tasks**. **My Tasks** opens.
2. Click the row **No answer to your counter in 7 days · NAME**. 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.

A corrected 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 delete the old figure.
6. Type the new figure (numbers only, no dollar sign).
7. Click the blue **Save** button at the bottom of the left side.

8. On the contact profile, scroll up to the folder **CASE** (just above **CARRIER & APPRAISER**) and click the folder's name to open it.
9. Look at the top of folder **CASE**.
10. Click the box under **Send counter** ⌵ and pick **Send it now** from the list.
11. Click the blue **Save** button at the bottom of the left side.

The new figure goes at once and the seven-day clock restarts. The same figure within ten minutes is skipped.

Later rounds

Each new **Their number** gives you a "new figure" text and the Negotiate task; each **Send counter** sends and restarts the clock. There is no limit. Use the same steps each round: **Or their figure** for their number, **Your counter** for yours.

If you cleared Their number by mistake

Clearing the field only leaves a note ("Their number was cleared. Nothing stopped, moved or sent"). Type it again with the steps in **Or their figure**, higher up on this page, and the case carries on.

If the counter will not send

Send counter comes back **Not sent (see task)** when **Counteroffer**, **Their number** or **My number** (folder **CARRIER & APPRAISER**) is empty, or **Claim #** (folder **Insurance Info**) is empty. The ⚠ **Counteroffer not sent** task says which.

You can also start from the task. In the left menu, click **Tasks**. Click the row ⚠ **Counteroffer not sent**, 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 start at step 4.

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. Look at **Claim #**. If it is empty, click in the box under **Claim #** and type the claim number.
6. Scroll up to the folder **CARRIER & APPRAISER** and click the folder's name to open it.
7. Look at **My number**. If it is empty, click in the box under **My number** and type your valuation (numbers only, no dollar sign).

8. Look at **Their number**. If it is empty, click in the box under **Their number** and type their figure (numbers only, no dollar sign).
9. Look at **Counteroffer**. If it is empty, click in the box under **Counteroffer** and type your figure (numbers only, no dollar sign).
10. Click the blue **Save** button at the bottom of the left side.
11. Wait one minute.
12. On the contact profile, scroll up to the folder **CASE** (just above **CARRIER & APPRAISER**) and click the folder's name to open it.
13. Look at the top of folder **CASE**.
14. Click the box under **Send counter** ⚡ and pick **Send it now** from the list.
15. Click the blue **Save** button at the bottom of the left side.

The ⚠ **Counteroffer not sent** task closes itself when the counter goes.

If you sent the counter yourself

Set **Send counter** to **I sent it myself**: the date is written and the seven-day clock starts; no email goes.

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 folder **CASE**, where the Send switches are.
6. Click the box under **Send counter** ⚡ and pick **I sent it myself** from the list.
7. Click the blue **Save** button at the bottom of the left side.
8. In the left menu, click **Tasks**. **My Tasks** opens.
9. Click the row **Negotiate • NAME**. A short preview opens under it.
10. Click **Open Full View**.
11. 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.

If something looks wrong

If you typed the wrong number in Their number, type over it with the steps in **Or their figure**, higher up on this page. Delete the wrong figure before you type the right one. Nothing goes to the customer or the other side, but your phone gets the "new figure" text and a new **Negotiate · NAME** task comes. Mark that task complete if there is nothing new to do.

If a corrected counter did not go, then it had the same figures as the one just sent (the ten-minute guard). Change the figure or the note and send again, or wait ten minutes and send again.

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** or **Negotiation note** and change the figure or the note.
6. Click the blue **Save** button at the bottom of the left side.
7. On the contact profile, scroll up to the folder **CASE** (just above **CARRIER & APPRAISER**) and click the folder's name to open it.
8. Look at the top of folder **CASE**.
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.

Other words for this: Their number = their figure, their offer, their value; Counteroffer = my counter, my number back; their report = the other appraiser's valuation, the carrier's report.

Step 7: the umpire

Answers: how do I go to the umpire? what does the customer hear? who pays the umpire? how do I record that the customer paid the umpire, and the decision?

When the two appraisers cannot agree, set **Umpire** to **Called**. The customer gets a text and an email on how the umpire step works and what they pay, and you get a three-step task.

Set 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 (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 **CARRIER & APPRAISER** and click the folder's name to open it. (If you already see its fields, it is open: clicking its name again closes 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.

← Contact Details

All fields DND Actions

Q Search fields and folders

--

My number
\$ 2,700.00

Their number
\$ 1,350.00

Counteroffer
\$ 2,000.00

Umpire
--

Umpire fee received
--

Picture: Folder CARRIER & APPRAISER open: Umpire and Umpire fee received circled (both are lists).

What happens, within a minute

1. The case moves to **4.3 Umpire**; the silence clock stops; Case status changes to "The case is with the umpire. We are waiting on the decision."
2. The customer gets a text explaining the umpire step in plain words, and the email "Your claim is going to an umpire". It says the two appraisers could not agree and a neutral umpire decides. The umpire's fee is split: **you send them an invoice for their half, and you release your valuation to the umpire once it is paid.**
3. You get the task **Umpire · NAME:**
4. Agree the umpire with the other appraiser.
5. Send the customer an invoice for their half of the umpire's fee (the clicks are in [Invoices and payments](#)). Release your valuation to the umpire only after it is paid.
6. When it is paid, click the box under **Umpire fee received** and pick **Received**.

Working the Umpire task

Task step 1 is a call with the other appraiser. Step 2 happens in **Invoices**; step 3 on the contact profile.

Invoice the customer for their half (task step 2)

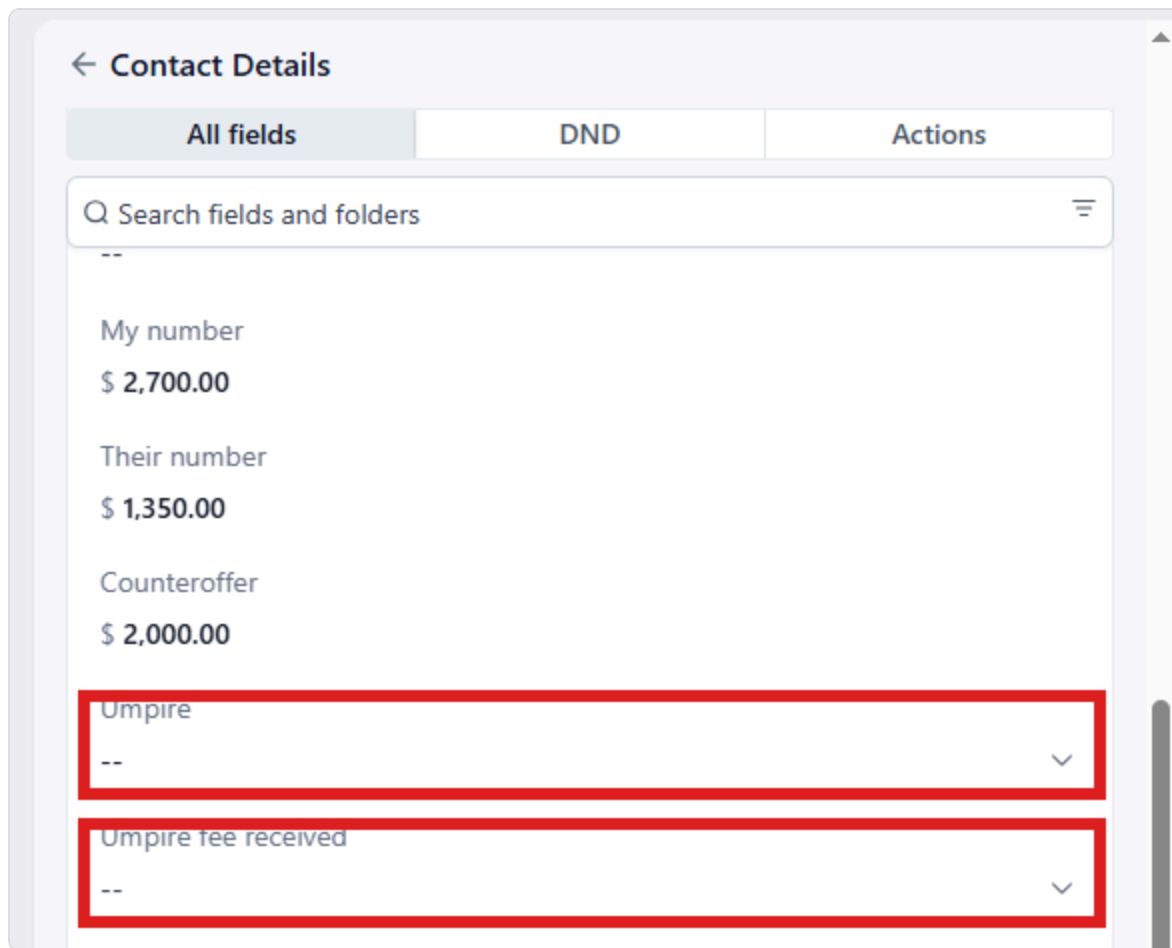
1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Click the blue + **New** button at the top right, then **New Invoice**.
3. Under **Customer Information**, click the box **Select Customer**, type the customer's last name and click their name.
4. Under **Add Products**, click + **Add Product** and pick **Appraisal fee**.
5. Click in the **Price** box on that line and type their half of the umpire's fee (numbers only, no dollar sign).
6. Click the blue **Send** button at the top right.
7. A window asks how to send it. Choose email and text, then click its send button.

Release your valuation to the umpire only after this invoice is paid.

Record that they paid (task step 3)

When the customer says the umpire is paid:

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 fee received** and pick **Received**.
6. Click the blue **Save** button at the bottom of the left side.



Picture: Folder CARRIER & APPRAISER open: Umpire and Umpire fee received circled (both are lists).

All three task steps are done. Close the task:

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 row **Umpire · NAME** (click **Due Today** or **Overdue** at the top if you do not see it). 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.

When the umpire decides

Set **Umpire** to **Decided**. That changes nothing by itself; the award does ([Step 8: 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 **CARRIER & APPRAISER** and click the folder's name to open it.
5. Click the box under **Umpire** ✂ and pick **Decided** from the list.
6. Click the blue **Save** button at the bottom of the left side.

Setting Called twice

Nothing happens the second time; the customer is not told again.

If something looks wrong

If the customer asks who pays the umpire, the answer is in the email they got. They pay their half to you, on the invoice you send them, before you release your valuation to the umpire. The agreement says so too. To read that email yourself:

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. In the middle of the contact profile, scroll up through the texts and emails to the email "Your claim is going to an umpire".

If you set Called by mistake, then the customer has already been told. Call them and carry on negotiating (the counter steps are in [Step 6: negotiation](#)). Tell us the RO number (in the left menu, click **Support**, then the orange **Support Ticket** button); we reset the field. Nothing else is sent. To find the RO number:

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.
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. At the top of the left side, under **Tags**, read the number next to **RO# DO NOT EDIT THIS!!**. pdrOS sets it; never change it.

Then close the **Umpire · NAME** task: in the left menu, click **Tasks**, click its row, click **Open Full View**, then click the green **Mark Complete** button.

Other words for this: umpire = the third appraiser, the tie-breaker; umpire fee = the umpire's half, the split fee.

Step 8: the award

Answers: how do I record the award? which folder is it in? what happens when I type it? how do I correct the amount?

Type the **Award amount** and pick the **Award signed date**. Both together settle the case: the customer gets the Settled text and email, every chase stops, and you get the summary task.

Type 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 (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 **OUTCOME** and click the folder's name to open it. (If you already see its fields, it is open: clicking its name again closes it.)
5. Click in the box under **Award amount** ✎ and type the agreed or awarded amount of loss (numbers only, no dollar sign).
6. Click the box under **Award signed date** ✎ and pick the day the award was signed in the calendar that opens.
7. Click the blue **Save** button at the bottom of the left side.

Picture: Folder OUTCOME open: Award amount and Award signed date circled.

Typing only the amount does nothing yet; the date completes it. You can fill them in either order.

What happens, within a minute

1. The case is marked settled and moves to **5.1 Award signed or settled**. Every chase, clock and reminder stops.
2. The customer gets the text "Good news... your claim is settled. [Insurer] will contact you for the paperwork and pays you directly. John Hayduk is sending you a summary of the numbers by email" and the email "Your claim is settled".
3. On a total loss or diminished value you get the task **Check the settlement summary · NAME** (its steps are in [Step 9: the settlement summary](#)). **Outcome** stays empty until the summary goes.
4. On a short pay the shop gets the "Settled" email and **Outcome** is set to Settled. On an inspection taken on, **Outcome** is set to Settled. In both, pdrOS then checks **Fee paid**: if it is **No**, you get the task **Fee not paid · NAME**; if it is paid, the case closes.

Saving the amount again

Correcting the amount later changes nothing on its own (the customer is not told twice). The corrected figure is used when you send the summary. To correct 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 **OUTCOME** and click the folder's name to open it.
5. Click in the box under **Award amount** and delete the old figure.
6. Type the right figure (numbers only, no dollar sign).
7. Click the blue **Save** button at the bottom of the left side.

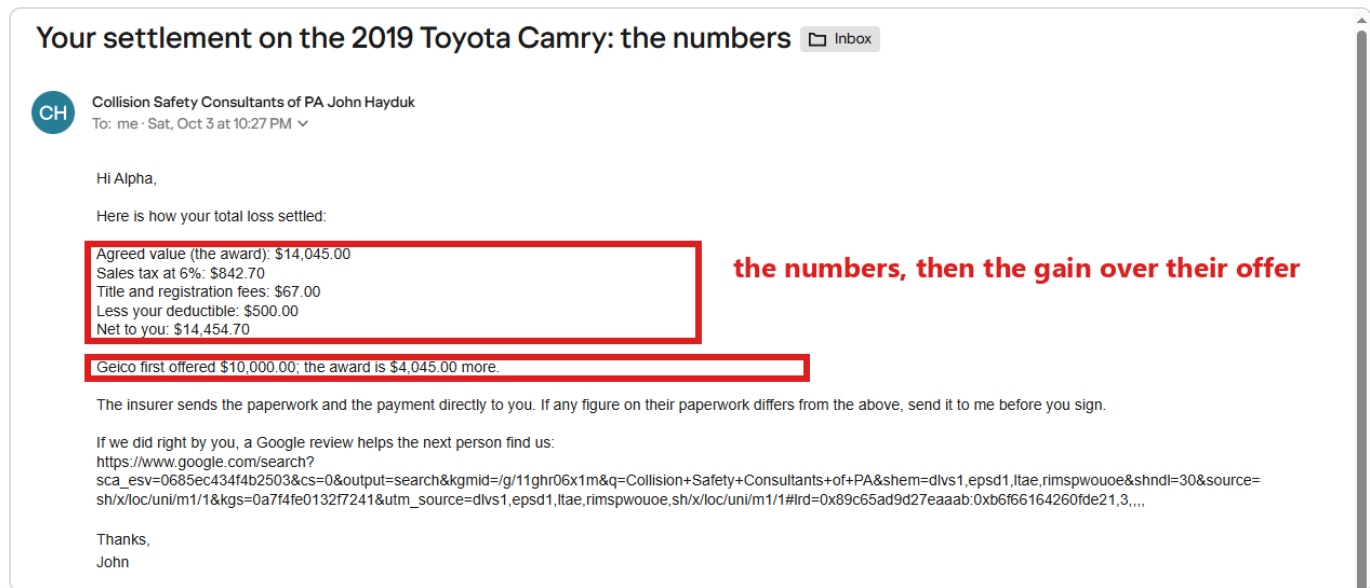
The award PDF

If you have the signed award as a PDF, keep it in your own records. The customer gets their copy through RTAflow and the insurer, as they do now. pdrOS sends them the summary of the numbers, not the award.

Step 9: the settlement summary

Answers: how do I send the settlement summary? which folder is each number in? what does pdrOS calculate? what if a number is missing?

Check five numbers, then set **Send summary** to **Send it now**. pdrOS computes the sales tax, the net to the customer and the gain over the first offer. It emails the customer the summary. Then pdrOS checks **Fee paid**: if it is **No**, you get the task **Fee not paid · NAME**; if it is paid, the case closes.



Picture: The settlement summary email with the numbers, as the customer sees it.

The five numbers (total loss)

They sit in three folders on the left side of the contact profile:

1. **Award amount**, in folder **OUTCOME** (you typed it in [Step 8: the award](#)).
2. **Carrier's offer**, in folder **CASE** (the insurer's first written offer; from the signup, or type it).
3. **Title fees**, in folder **OUTCOME**.
4. **Deductible**, in folder **Insurance Info**.
5. **Sales tax %**, in folder **OUTCOME** (preset to 6).

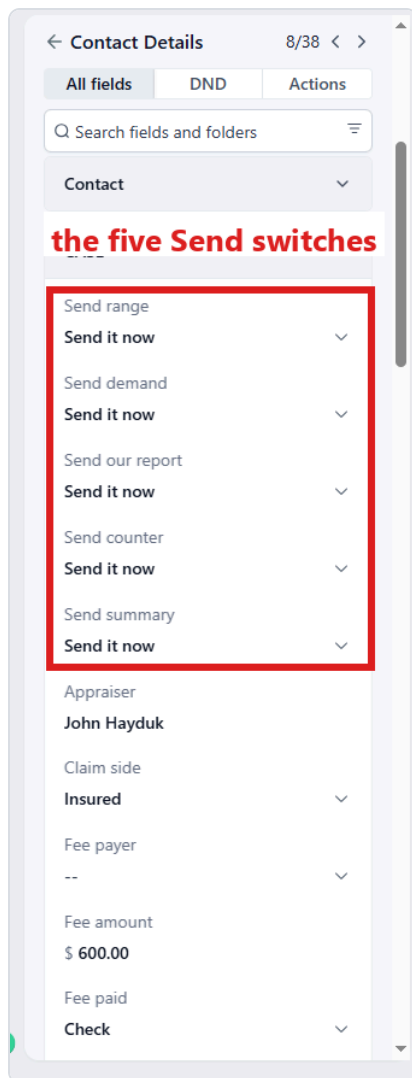
A diminished value summary needs only the first two.

Check them and send

You work from the task **Check the settlement summary · NAME**.

You can also start from the task. In the left menu, click **Tasks**. Click the row **Check the settlement summary · NAME**, 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 start at step 4.

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 **Insurance Info** and click the folder's name to open it. (If you already see its fields, it is open: clicking its name again closes it.)
5. Look at **Deductible**. If it is empty or wrong, click in the box under **Deductible** and type the amount (numbers only, no dollar sign).
6. Scroll up to the folder **CASE** and click the folder's name to open it.
7. Look at **Carrier's offer**. If it is empty or wrong, click in the box under **Carrier's offer** and type the amount (numbers only, no dollar sign).
8. Scroll down to the folder **OUTCOME** and click the folder's name to open it.
9. Look at **Award amount**. It shows the award you typed.
10. Look at **Title fees**. If it is empty or wrong, click in the box under **Title fees** and type the amount (numbers only, no dollar sign).
11. Look at **Sales tax %**. It reads 6 unless someone changed it. To change it, click in the box under **Sales tax %** and type the number.
12. If you typed anything, click the blue **Save** button at the bottom of the left side.
13. Scroll up to the folder **CASE** (two folders above **OUTCOME**). If its fields do not show, click the folder's name to open it. The Send switches are near its top, right after **Case status**.
14. Click the box under **Send summary** ⌵ and pick **Send it now** from the list.
15. Click the blue **Save** button at the bottom of the left side.



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

Then close the task:

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 row **Check the settlement summary · NAME** (click **Due Today** or **Overdue** at the top if you do not see it). 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.

What pdrOS computes

Line	How
Recovery over offer	Award amount minus Carrier's offer
Sales tax amount	Award amount × Sales tax % ÷ 100
Net to customer	Award amount + Sales tax amount + Title fees – Deductible

Worked example, a real one from testing: award \$14,045.00, offer \$10,000.00, title fees \$67.00, deductible \$500.00, tax 6 percent. - Sales tax amount: \$842.70 - Net to customer: \$14,454.70 - Recovery over offer: \$4,045.00

Those three are written into folder **OUTCOME** on the contact profile, and into the email.

What happens, within two minutes

1. The customer gets the email "Your settlement on the [vehicle]: the numbers" (diminished value: "Your diminished value settlement: the numbers") with every line.
2. **Send summary** reads **Sent**; **Settlement summary sent date** is written; **Outcome** becomes **Settled**; the case moves to **5.2 Summary sent**.
3. pdrOS then checks **Fee paid**. If it is **No**, the case moves to **6.1 Fee due** and you get the task **Fee not paid · NAME**. If the fee is already paid, the case closes (see [Fee and close](#)).

If a number is missing

Send summary returns **Not sent (see task)** and the task **A Send switch could not act** says which number. Type it, wait a minute, then set the switch again. On a short pay or an inspection the switch is refused too (no customer summary on those types).

1. In the left menu, click **Tasks**. **My Tasks** opens.
2. Click the row **A Send switch could not act · NAME**. A short preview opens under it.
3. Click **Open Full View** and read which number is missing.
4. Click the link under **WHERE** (it follows the words "Open the case"). The 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.
5. On the left side of the contact profile, scroll down to the folder that holds the missing number and click the folder's name to open it. **Deductible** is in **Insurance Info**, **Carrier's offer** in **CASE**, the other three in **OUTCOME**.
6. Click in the box under the missing number and type it (numbers only, no dollar sign).
7. Click the blue **Save** button at the bottom of the left side.

8. Wait one minute.
9. Scroll to the folder **CASE** (up from **OUTCOME**, down from **Insurance Info**). If it is closed, click its name. Look at the top of the folder.
10. Click the box under **Send summary** ✕ and pick **Send it now** from the list.
11. Click the blue **Save** button at the bottom of the left side.
12. Go back to the browser tab with the task.
13. 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.

If you sent the summary yourself

Set **Send summary** to **I sent it myself**: the figures are still computed and written, the date and Outcome are set, no email goes.

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 folder **CASE**, where the Send switches are.
6. Click the box under **Send summary** ✕ and pick **I sent it myself** from the list.
7. Click the blue **Save** button at the bottom of the left side.
8. In the left menu, click **Tasks**. **My Tasks** opens.
9. Click the row **Check the settlement summary · NAME**. A short preview opens under it.
10. Click **Open Full View**.
11. 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.

If you picked Outcome Settled yourself

If you set **Outcome** to **Settled** before the summary went, nothing happens: the case waits for the summary. Send it, or set **I sent it myself**:

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 folder **CASE**, where the Send switches are.
6. Click the box under **Send summary** ✕ and pick **Send it now** (pdrOS emails the summary) or **I sent it myself** (no email goes).
7. Click the blue **Save** button at the bottom of the left side.

Step 10: the fee and the close

Answers: how do I record the fee? how do I record a check on the invoice, void it, refund it or send its pay link again? how does a case close? what happens on a closed case?

A hired case (the customer signed the agreement) closes when it has a final **Outcome** and **Fee paid** is anything but **No**. A case where the customer never signed closes as soon as it has a final **Outcome**. (**Counteroffer pending**, **Carrier review report received** and **Court** are not final: the case waits at **6.2 Outcome pending**.) Set **Fee paid** when the money is in. pdrOS then closes the case, switches Sarah off and stops everything else. If the case was won, it also asks the customer for a review.

Fee paid ✂

Fee paid is in the folder **CASE** on the contact profile. Its choices are **No**, **Square**, **Venmo**, **Check**, **Cash** and **Waived**.

- **Square**: written for you when a Square invoice is paid by card (you also get a text). You can set it yourself if you took a card payment another way.
- **Venmo** and **Check**: set it yourself when the money arrives.
- For cash, pick **Cash** in **Fee paid**, then record it on the invoice as **Cash**.
- **Waived**: you chose not to charge. Closes the case like a payment.

Set Fee paid yourself

You can also start from the task **Fee not paid · NAME**. In the left menu, click **Tasks**. Click its 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 start at step 4.

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. (If you already see its fields, it is open: clicking its name again closes it.)
5. Click the box under **Fee paid** ✂ and pick how it was paid: **Square**, **Venmo**, **Check**, **Cash** or **Waived**.
6. Click the blue **Save** button at the bottom of the left side.

Picture: Folder CASE open: the Fee paid list open with No, Square, Venmo, Check, Waived, Cash.

If the money came by check, cash or Venmo, now record it on the invoice (steps below). If you picked **Waived**, void the invoice (steps below).

If you had the task **Fee not paid • NAME**, close it:

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 row **Fee not paid • NAME** (click **Due Today** or **Overdue** at the top if you do not see it). 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.

The invoice

The Square invoice sends the customer its own reminders. If the fee came another way, record the payment on the invoice so the reminders stop. Void the invoice only when you waive the fee. Order matters: set **Fee paid** first, then record the payment on the invoice. If the invoice turns **Paid** while **Fee paid** still says **No**, pdrOS writes **Square** in **Fee paid**, even for a check. Every invoice is under **Invoices** in the left menu.

Invoices
Create and manage all invoices generated for your business

Settings + New

Connect at least one payment gateway to start receiving payments
Integrate Payment Gateway

0 Invoice(s) in Draft
\$0.00

2 Invoice(s) in Due
\$1,200.00

0 Invoice(s) received
\$0.00

2 Invoice(s) Overdue
\$1,800.00

Start Date → End Date Q Search

Invoice Name	Invoice Number	Customer	Issue Date ↑	Amount	Status
Appraisal fee + travel	INV-000002	EZ Echo Zztest	Oct 2, 2026	\$1,200.00	Overdue
Appraisal fee	INV-000001	KZ Kitcheck Zztest	Oct 1, 2026	\$600.00	Overdue
Appraisal fee	INV-000004	DZ Delta Zztest	Oct 3, 2026	\$600.00	Due In 1 Day(S)
Appraisal fee	INV-000003	AZ Alpha Zztest	Oct 3, 2026	\$600.00	Due In 1 Day(S)

the three dots at the right end of a row: Copy Link, Void, Record Payment

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Picture: Invoices: the list with each invoice's status, the three dots at the right end of one row circled.

Record a check, cash or Venmo on the invoice

1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Find the customer's name in the list.
3. Click the three dots at the right end of the invoice's row.
4. Click **Record Payment**.
5. Click **Record Manually**.
6. Pick **Check** for a check, **Cash** for cash, or the choice that fits Venmo (**Other** if it is offered).
7. Type the amount and the date.
8. Click **Submit**.

Void the invoice (a waived fee)

A paid invoice cannot be voided; refund it first (below).

1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Find the customer's name in the list.
3. Click the three dots at the right end of the invoice's row.
4. Click **Void**.

Refund a card payment

1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Find the customer's name in the list and click their invoice to open it.
3. Click the three dots at the top right of the invoice (next to **Save**).
4. Click **View Transaction** (it shows only on a paid invoice).
5. Click **Refund**. If you do not see **View Transaction**, tell us (in the left menu, click **Support**, then the orange **Support Ticket** button) and we refund it with you.

A refund does not change the case.

Send the pay link again

If the customer cannot find the invoice text:

1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Find the customer's invoice in the list.
3. Click the three dots at the right end of its row.
4. Click **Copy Link**.
5. In the left menu, click **Contacts**.
6. Click in the search box at the top of the list and type the customer's last name or RO number.
7. 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.
8. At the bottom of the middle of the contact profile is the message box. At its left end, click the small button with a down arrow and pick **SMS**.
9. Click in the box.
10. Press **Ctrl** and **V** together to paste the link (on a Mac, **Cmd** and **V**). Send the link alone, with no words around it.

11. Click the paper-plane button at the right end to send.

The fee guard

After settlement, while **Fee paid** is No: - The case sits at **6.1 Fee due** with the task **Fee not paid · NAME**. - **Day 14**: your phone gets "the fee on NAME is still unpaid after 14 days. The invoice keeps reminding them". - **Day 28**: a note; the task stays open.

pdrOS itself sends the customer no fee reminders; the Square invoice does that.

A hired case cannot close while **Fee paid** is **No**: whatever the **Outcome**, it waits at **6.1 Fee due** with the task **Fee not paid · NAME**. A case where the customer never signed closes as soon as it has an **Outcome**. A fee paid early (before there is an Outcome) is recorded and waits.

The close, within a minute of Fee paid

1. **Outcome recorded date** is written; the case moves to **6.3 Closed**; Case status changes to "Closed. Thank you."
2. Sarah is switched off for this customer. Every chase, reminder, clock and outcome ask stops.
3. If the case was won (Settled or Report only), the customer gets the review ask: "thank you for trusting Collision Safety Consultants of PA with your claim. If we did right by you, a short Google review helps the next person" and the Google link in its own text. Only once per case.

What still works on a closed case

- Switches, uploads, numbers, dates and a type change do nothing (a switch gives you the "did not go" text five minutes later).
- A text or email from the customer still arrives in the middle of their contact profile; Sarah does not answer, you do.
- A message from them with the word refund still texts you and gives you the task **URGENT · refund request · NAME**. Call them now, then mark the task complete.
- If they use their old signup link again, nothing opens and your phone gets a text: "NAME submitted the signup on a closed case".
- Setting **Fee paid** again (say Check after Square) runs the close again but sends no second review ask.

A new claim from an old customer

Start the new case with your plain signup link: open your bookmark named "Signup" ([Your three links](#)) and fill it with the customer on the phone. A customer with two cases has two contact profiles that share one phone number. Until we move the number, every text from that customer lands on the older contact profile. If the older case is closed, Sarah is off there and nobody answers. Tell us the day the new case opens (in the left menu, click **Support**, then the orange **Support Ticket** button); we move the phone number to the open case. More in [When something goes wrong](#).

If something looks wrong

If you set Fee paid and the case did not close, then it has no **Outcome** yet (no award, no summary, no ending). The fee is recorded; the close happens when the Outcome arrives. To check:

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. Look at **Outcome**. If it is empty, the case is still waiting for its ending.

If the review text went to a customer you did not want asked, then it goes once only; nothing further is sent. Tell us (in the left menu, click **Support**, then the orange **Support Ticket** button) if you want the review ask off for a case type.

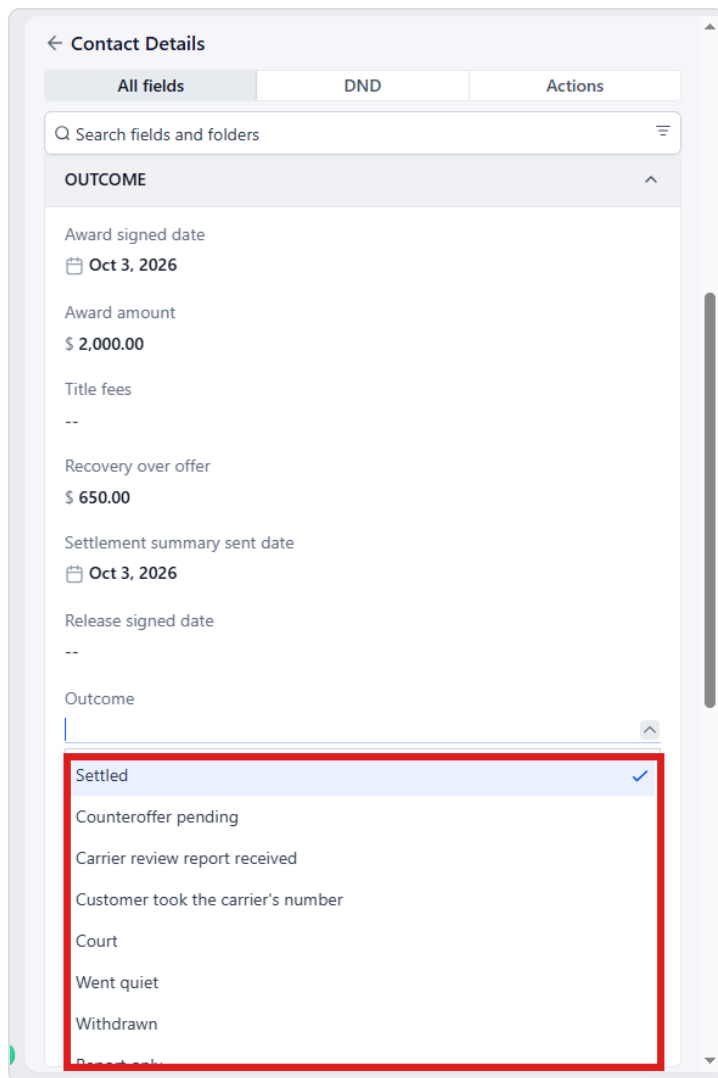
Other endings: the Outcome list

Answers: how do I close a case that did not settle? how do I set Outcome? what do Withdrawn, Went quiet, Court, Counteroffer pending do?

Outcome is how a case ended. pdrOS writes Settled and Report only for you; you pick the others. Some close the case, some keep it open and ask the customer how it went.

Set the Outcome

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 **OUTCOME** and click the folder's name to open it. (If you already see its fields, it is open: clicking its name again closes it.)
5. Click the box under **Outcome** ✂ and pick the ending from the list. The table below says what each one does.
6. Click the blue **Save** button at the bottom of the left side.



Picture: Folder OUTCOME open: the Outcome list open.

Outcome	What it means	What pdrOS does
Settled	Agreed or awarded.	Written by pdrOS when the summary goes (short pay and inspection: when the award is typed). Then pdrOS checks Fee paid : if it is No , you get the task Fee not paid · NAME ; if it is paid, the case closes, with the review ask.
Report only	Inspection customer wanted the report and nothing more.	Written by pdrOS when you set Engaged against to None. Then pdrOS checks Fee paid : if it is No , you get the task Fee not paid · NAME ; if it is paid, the case closes, with the review ask.
Withdrawn	The customer pulled out.	Closes. No fee task if never hired; no review ask.
Customer took the carrier's number	They accepted the insurer's offer against advice.	Closes.

Outcome	What it means	What pdrOS does
Went quiet	No documents, no answers, nothing after the reminders.	Closes.
Court	The customer is taking it to court.	Does not close. Stage 6.2 Outcome pending . No asks go to the customer; the case waits until you set a final outcome.
Counteroffer pending	A counter is out and the customer is deciding or waiting.	Does not close. Stage 6.2; the same asks.
Carrier review report received	The carrier sent its review; waiting on their move.	Does not close. Stage 6.2; the same asks.

A hired case (the customer signed the agreement) whose **Fee paid** is still **No** does not close on any Outcome. It waits at **6.1 Fee due** with the task **Fee not paid · NAME** until you set **Fee paid** ([Step 10: the fee and the close](#)).

The outcome asks

For **Counteroffer pending** and **Carrier review report received**, pdrOS texts and emails the customer "How did your claim end up?". **Court** sends no asks: the case waits for you. The asks go on days 30, 60, 90 and 120 after you set the outcome, then on days 210 and 300. After the day-300 ask with no answer you get the task **No answer for a year · close it? · NAME**. The asks stop the moment you set a final outcome, or when their figure or report comes in on the case.

When that task comes:

1. Call the customer and ask how it ended.
2. In the left menu, click **Contacts**.
3. Click in the search box at the top of the list and type the customer's last name or RO number.
4. 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.
5. On the left side of the contact profile, scroll down to the folder **OUTCOME** and click the folder's name to open it.
6. Click the box under **Outcome** ✕ and pick the final ending from the list.
7. Click the blue **Save** button at the bottom of the left side.
8. 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.

9. Click the row **No answer for a year · close it? · NAME** (click **Due Today** or **Overdue** at the top if you do not see it). A short preview opens under it.
10. Click **Open Full View**.
11. 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.

Changing your mind

Pick a different Outcome, then click the blue **Save** button at the bottom of the left side. If the case is still open, a closing outcome (**Withdrawn, Went quiet, Customer took the carrier's number**) closes it. A pending one (**Counteroffer pending, Carrier review report received**) starts the asks again; **Court** waits for you. A hired case with **Fee paid** at **No** waits for the fee first. If the case has already closed, changing **Outcome** does not reopen it; tell us (see below).

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 the box under **Outcome** ✂ and pick the new ending from the list.
6. Click the blue **Save** button at the bottom of the left side.

Fee first or outcome first

Either order works. Fee paid before the outcome is simply recorded. The close happens when both are there.

If something looks wrong

If you set the wrong Outcome and the case closed, then a closed case stays closed. Tell us the RO number (in the left menu, click **Support**, then the orange **Support Ticket** button); we reopen it on our side. To find the RO number:

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.
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. At the top of the left side, under **Tags**, read the number next to **RO# DO NOT EDIT THIS!!**. pdrOS sets it; never change it.

If the customer answers "it settled" to the outcome ask, type the **Award amount** and pick the **Award signed date**. Or pick **Settled** in **Outcome**: the asks stop, but on a total loss or diminished value the case still waits for the summary ([Step 9](#)).

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.

Or, instead of steps 5 and 6: click the box under **Outcome** and pick **Settled** from the list. 7. Click the blue **Save** button at the bottom of the left side.

pdrOS also marks the closed case on the case board: won (settled, report only), lost (withdrawn, took the carrier's number) or abandoned (went quiet). You do nothing there. To see the board: in the left menu, click **Repair Stages**, then pick the pipeline **APPRAISAL CASES** at the top left. Look only: never drag a card; pdrOS moves them.

Diminished value: what differs from a total loss

Answers: what is different on a diminished value case? how do I send the demand? what is in the demand pack? what is the statute deadline? how do I set a Demand-by date?

A diminished value case is a claimant case. The demand goes to the at-fault driver's insurer with a full pack. pdrOS chases the adjuster three times and tracks the statute deadline from day one. Everything else runs like a total loss.

At signup

- **Claim side** is **Claimant**. To check: in the left menu, click **Contacts**, search the customer and click their name. On the left side of the contact profile, scroll down to the folder **CASE** and click its name. If it says **Insured**, click the box under **Claim side** and pick **Claimant**, then click the blue **Save** button at the bottom of the left side.
- **Date of Loss** matters (folder **FORM | Repair Authorization**). Within a few minutes pdrOS sets **Statute deadline** (folder **CARRIER & APPRAISER**) to two years after it. It texts the customer "if this claim ever has to go to court, the deadline to file is [date]. We keep track of it for you."
- The documents request asks for the final repair invoice and the mileage (they reply by text). It also asks for photos of the damage and of the finished repair (the **Upload Photos Here** box on the upload page).

Documents in

The case moves to **1.2 Documents in** when two things have arrived: the customer's photos, and a file in **Repair invoice** or **Carrier valuation report** (both in folder **CASE**). The photos come in as a photo report in **Damage Images PDF** (folder **Pics To Email PDF**).

Range and agreement

Same as a total loss. The range email is "Your diminished value claim: what I think the car lost". The fee can be a different amount: type **Fee amount** before they sign and you get the "Send a custom invoice · NAME" task instead of an automatic invoice.

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. (If you already see its fields, it is open: clicking its name again closes it.)
5. Click in the box under **Fee amount** and type the fee (numbers only, no dollar sign).
6. Click the blue **Save** button at the bottom of the left side.

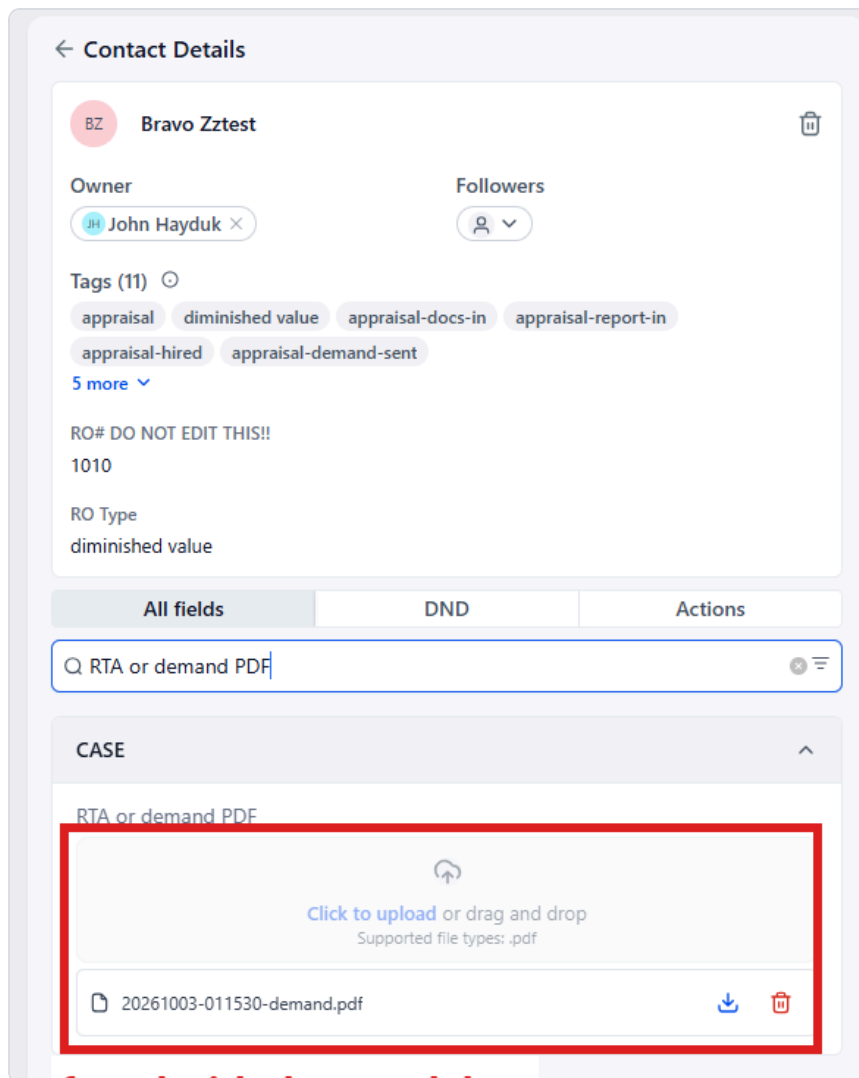
The steps for the custom invoice are in [Invoices and payments](#).

The demand

You work from the task **Send the demand · NAME** (it comes when the customer signs).

You can also start from the task. In the left menu, click **Tasks**. Click the row **Send the demand · NAME**, 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 start at step 4.

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. Look at **Claim #**. If it is empty, click in the box under **Claim #** and type the claim number.
6. Scroll down to the folder **FORM | Repair Authorization** and click the folder's name to open it.
7. Look at **Date of Loss**. If it is empty, click the box under **Date of Loss** and pick the accident day in the calendar that opens.
8. Scroll up to the folder **CASE** and click the folder's name to open it.
9. In **RTA or demand PDF**, click **Click to upload**.
10. Pick your demand letter on your computer and click **Open**.
11. Scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it.
12. Click in the box under **Adjuster name** and type the adjuster's name.
13. Click in the box under **Adjuster email** and type the adjuster's email.
14. Click the blue **Save** button at the bottom of the left side.
15. Scroll up to the folder **CASE** (just above **CARRIER & APPRAISER**) and go to the top of the folder, where the Send switches are.
16. Click the box under **Send demand** ⚡ and pick **Send it now** from the list.
17. Click the blue **Save** button at the bottom of the left side.



Picture: Folder CASE open: RTA or demand PDF with Click to upload circled.

The adjuster gets "Demand · NAME · claim X" from you with the pack attached: the demand, your report, the repair invoice, the photo report and the signed agreement. The customer is texted that the demand went and that you follow up if they go quiet.

If **Send demand** comes back **Not sent (see task)**, the **△ Demand not sent** task names what is missing. Fix it with the steps under **If it will not send** in [Step 4: the RTA](#).

Then close the task:

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 row **Send the demand · NAME** (click **Due Today** or **Overdue** at the top if you do not see it). 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.

The demand chase

- **Day 10:** a chase email to the adjuster, with the demand and your report attached again.
- **Day 17:** a second chase.
- **Day 24:** a third.
- Then your phone gets "three demand chases to [insurer] got no answer" and you get the task **Three chases, no answer · NAME:** call the adjuster's supervisor. The customer is asked how it stands on days 30, 60, 90 and 120 after the third chase, then days 210 and 300. The case stays at **3.1**. The asks stop the moment their figure or report comes in, or when you set an **Outcome**.

After you call the supervisor, close the task:

1. In the left menu, click **Tasks. My Tasks** opens.
2. Click the row **Three chases, no answer · NAME**. 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.

The chase stops the moment you type **Their number** or upload their report into **Supplement #1 Upload Doc Here** (folder **Supplements**). The steps for **Their number** are in the next section.

Their figure and your counter

Their number ✂ stops the chase and gives you the Negotiate task. **Send counter** emails the adjuster: "the carrier is at \$1,350.00 and the documented loss supports \$2,700.00. [Your note]. My client will accept \$2,000.00 today." If the adjuster is silent for 7 days, you get a text and the task **No answer to your counter in 7 days · NAME**.

Type their figure

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 **Their number** ✂ and type their figure (numbers only, no dollar sign).

6. Click the blue **Save** button at the bottom of the left side.

Send your counter

You work from the task **Negotiate · NAME**.

You can also start from the task. In the left menu, click **Tasks**. Click the row **Negotiate · NAME**, 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 start at step 4.

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 figure (numbers only, no dollar sign).
6. If you want a line in the email, click in the box under **Negotiation note** and type it.
7. Click the blue **Save** button at the bottom of the left side.
8. On the contact profile, scroll up to the folder **CASE** (just above **CARRIER & APPRAISER**) and click the folder's name to open it.
9. Look at the top of folder **CASE**, where the Send switches are.
10. Click the box under **Send counter** < and pick **Send it now** from the list.
11. Click the blue **Save** button at the bottom of the left side.
12. In the left menu, click **Tasks**. **My Tasks** opens.
13. Click the row **Negotiate · NAME**. A short preview opens under it.
14. Click **Open Full View**.
15. 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.

Pre-court

When you send the tortfeasor letter (the pre-court letter to the at-fault driver) yourself, pick the day in **Tortfeasor letter sent date** < (folder **CARRIER & APPRAISER**). The case moves to **4.4 Pre-court**.

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 **Tortfeasor letter sent date** ⌵ and pick the day you sent the letter in the calendar that opens.
6. Click the blue **Save** button at the bottom of the left side.

Deadlines you can set

Demand-by date ⌵ (folder **CARRIER & APPRAISER**): a date you choose. You get a text and task 14 days before and a text 3 days before. Clearing it stops them. The statute deadline alerts the same way, by itself. You get a text and the task **Statute deadline in 14 days · NAME** 14 days before, and a text 3 days before.

To set 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 the box under **Demand-by date** ⌵ and pick the day in the calendar that opens.
6. Click the blue **Save** button at the bottom of the left side.

To clear it, do steps 1 to 4, then:

1. Click in the box under **Demand-by date**. 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.
2. Click the blue **Save** button at the bottom of the left side.

When the task **Demand-by date in 14 days · NAME** or **Statute deadline in 14 days · NAME** comes and you have acted on it, close it:

1. In the left menu, click **Tasks**. **My Tasks** opens.
2. Click the row of that task. 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.

Settlement

Award amount and date settle it; the summary needs only **Award amount** and **Carrier's offer**. pdrOS writes **Recovery over offer** and **Net to customer** (the award itself) in folder **OUTCOME** and emails "Your diminished value settlement: the numbers". Example from testing: \$2,000 award on a \$1,350 offer, \$650 over, \$2,000 net.

Type 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 the award was signed in the calendar that opens.
7. Click the blue **Save** button at the bottom of the left side.

Send the summary

You work from the task **Check the settlement summary · NAME**.

You can also start from the task. In the left menu, click **Tasks**. Click the row **Check the settlement summary · NAME**, 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 start at step 4.

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 **Carrier's offer**. If it is empty or wrong, click in the box under **Carrier's offer** and type the amount (numbers only, no dollar sign).
6. If you typed anything, click the blue **Save** button at the bottom of the left side.
7. Look at the top of folder **CASE**, where the Send switches are.

8. Click the box under **Send summary** ⌵ and pick **Send it now** from the list.
9. Click the blue **Save** button at the bottom of the left side.
10. In the left menu, click **Tasks**. **My Tasks** opens.
11. Click the row **Check the settlement summary • NAME**. A short preview opens under it.
12. Click **Open Full View**.
13. 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.

Counteroffer pending

If the customer is sitting on a counter, set **Outcome** to **Counteroffer pending**. The case waits at **6.2 Outcome pending**. The customer is asked how it went on days 30, 60, 90 and 120, then days 210 and 300, until you set the final outcome.

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 the box under **Outcome** ⌵ and pick **Counteroffer pending** from the list.
6. Click the blue **Save** button at the bottom of the left side.

Other words for this: diminished value = DV, loss of value, the car is worth less after the repair; demand = demand letter, the claim letter; tortfeasor letter = pre-court letter, the letter to the at-fault driver; statute deadline = the two-year limit, the filing deadline.

Short pay: what differs

Answers: what is different on a short pay? what does the shop get? what does Sharon do? how do I upload the rewrite, record the award and invoice the shop?

On a short pay the paperwork comes from the body shop. Sharon enters the shop's estimate in CCC1 and you rewrite it. The owner signs when the rewrite is done. The shop usually pays, and the shop is told when the case settles.

At signup

- Usually a shop referral comes first: pdrOS makes the owner's contact profile with the shop's name already on it.
- Or you fill the signup with the owner yourself:
- Open your signup link (your bookmark named "Signup"; see [Your three links](#)).
- Fill it with the owner on the phone.
- Type the shop's name in **Referring shop**, and its contact person and email in the boxes next to it when the form shows them.
- Click **Submit**.
- **Fee payer** is **Shop** in most cases, and **Claim side** is **Insured** (the owner's own insurer short-paid). Both are lists in folder **CASE**. To check: in the left menu, click **Contacts**, search the owner and click their name. On the left side of the contact profile, scroll down to the folder **CASE** and click its name. If one is wrong, click its box and pick the right choice, then click the blue **Save** button at the bottom of the left side.

What goes out at signup

- The owner gets the welcome text and email, and one text: "On your short pay we work with [shop] on the paperwork and with [insurer] on the numbers. Nothing to send now."
- The shop gets an email from you with the owner's upload link: "what we need on NAME's [vehicle]": the shop's estimate (PDF), the carrier's estimate (PDF), invoices and photos.

The shop chase

If the shop sends nothing, it gets a reminder email on day 2 and day 12. You get the task **Chase documents · NAME** on day 5 and **Nothing after three weeks · close it? · NAME** on day 19.

For **Chase documents · NAME**, call the shop. For **Nothing after three weeks · close it? · NAME**, call once more or close the case as **Went quiet** (steps in [Step 1: the documents](#)). Then close the task:

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 (click **Due Today** or **Overdue** at the top if you do not see it). 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.

Both estimates in

When **Shop estimate PDF** and **Carrier estimate PDF** (both in folder **CASE**) both hold a file (either from the shop's uploads or from you): - The case moves to **1.2 Documents in**. - Sharon gets the task **Enter the shop's estimate in CCC1 · NAME** with both files, and the office phone gets a text about it. When the estimate is entered, Sharon closes the task: 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. - You get the task **Finish the rewrite · NAME**.

One estimate alone does nothing yet.

To upload an estimate yourself:

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the owner's last name or RO number (your case number).
3. Click the owner's name in the list. Their contact profile opens. You are in the right place when you see the owner'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. (If you already see its fields, it is open: clicking its name again closes it.)
5. In **Shop estimate PDF** ⚡ (or **Carrier estimate PDF** ⚡), click **Click to upload**.
6. Pick the PDF on your computer and click **Open**.
7. Click the blue **Save** button at the bottom of the left side.

Sharon's totals

Optional: the short pay tasks print these totals, so filling them saves you a look at the PDFs.

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

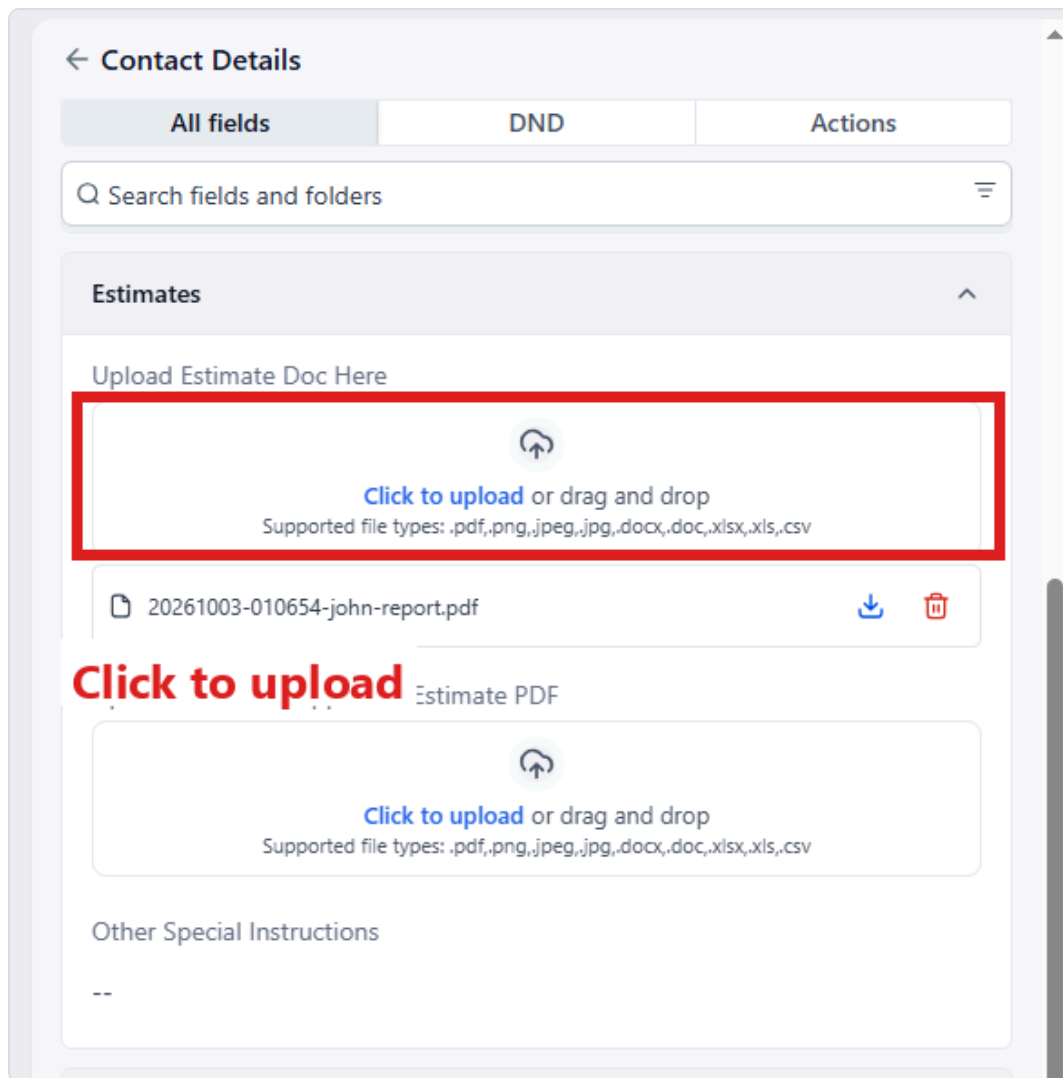
3. Click the owner's name in the list. Their contact profile opens. You are in the right place when you see the owner's name at the top left and their texts in the middle.
4. On the left side of the contact profile, scroll down to the folder **SHORT PAY & INSPECTION** (right after **OUTCOME**) and click the folder's name to open it.
5. Click in the box under **Shop estimate total** and type the amount (numbers only, no dollar sign).
6. Click in the box under **Carrier estimate total** and type the amount.
7. Click in the box under **Variance** and type the gap between the two.
8. When the rewrite is done, click in the box under **Rewritten estimate total** and type its total.
9. Click the blue **Save** button at the bottom of the left side.

The rewrite

You work from the task **Finish the rewrite · NAME**.

You can also start from the task. In the left menu, click **Tasks**. Click the row **Finish the rewrite · NAME**, 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 start at step 4.

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the owner's last name or RO number.
3. Click the owner's name in the list. Their contact profile opens. You are in the right place when you see the owner'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**.
6. Pick your rewrite on your computer and click **Open**.
7. Click the blue **Save** button at the bottom of the left side.



Picture: Folder Estimates open: Click to upload in Upload Estimate Doc Here circled.

Within a minute: 1. The case moves to **1.3 Report written**. 2. The owner gets "Our rewrite of your repair estimate is done. To let us take it up with [insurer] for you, please sign the agreement with the link in my next text", the agreement link, and the email "Your short pay with [insurer]: one signature to start". 3. Your phone gets "the rewrite for NAME is in and the agreement went to them to sign. Next task: Send the demand, once they sign".

There is no range step on a short pay (Send range is refused on this type).

Then close the task:

1. In the left menu, click **Tasks. My Tasks** opens.
2. Click the row **Finish the rewrite • NAME**. 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.

The agreement

The owner signs the short pay agreement. **Fee payer Shop** means no invoice to the owner. Instead you get the task **Invoice the shop · NAME** (the steps are under **The fee** below).

The RTA and the rest

From here it runs like a total loss. Send demand sends the RTA to the adjuster and starts the wait for their appraiser to call (7 business days). You pick the other appraiser's contact date. Send our report sends your rewrite and both estimates (and the repair invoice when the case has one), and the wait for their report (22 days) starts. Then come their number, counters and the umpire. The steps are in [Step 4: the RTA](#) through [Step 7: the umpire](#).

Settled

Type the **Award amount** and pick the **Award signed date** (folder **OUTCOME**). The owner gets the Settled text and email, **Outcome** becomes **Settled**, and the shop gets an email from you: "Settled · NAME's [vehicle]". There is no customer summary on a short pay (Send summary is refused). Then pdrOS checks **Fee paid**: if it is **No**, you get the task **Fee not paid · NAME**.

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the owner's last name or RO number.
3. Click the owner's name in the list. Their contact profile opens. You are in the right place when you see the owner'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 the award was signed in the calendar that opens.
7. Click the blue **Save** button at the bottom of the left side.

The fee

Invoice the shop by hand. When paid, set **Fee paid** (**Check, Cash, Square, Venmo**). If you decide not to charge, **Waived** closes the case the same way.

Invoice the shop

First, look up the fee:

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the owner's last name or RO number.
3. Click the owner's name in the list. Their contact profile opens. You are in the right place when you see the owner'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. Read the amount in **Fee amount**. You only looked, so there is nothing to save.

Then make the invoice:

1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Click the blue **+ New** button at the top right, then **New Invoice**.
3. Under **Customer Information**, click the box **Select Customer**, type the customer's last name and click their name (for a shop, type the shop's name).
4. Under **Add Products**, click **+ Add Product** and pick **Appraisal fee**.
5. Click in the **Price** box on that line and type the fee (numbers only, no dollar sign).
6. Click the blue **Send** button at the top right.
7. A window asks how to send it. Choose email and text, then click its send button.
8. In the left menu, click **Tasks**. **My Tasks** opens.
9. Click the row **Invoice the shop · NAME**. A short preview opens under it.
10. Click **Open Full View**.
11. Click the green **Mark Complete** button at the bottom right of the full view.

More on invoices: [Invoices and payments](#).

When the shop has paid

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the owner's last name or RO number.
3. Click the owner's name in the list. Their contact profile opens. You are in the right place when you see the owner'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 **Check, Cash, Square** or **Venmo** (or **Waived** if you decide not to charge).
6. Click the blue **Save** button at the bottom of the left side.
7. Record the payment on the shop's invoice (for Venmo pick **Other**), so its reminders stop. The steps are under **Record a check, cash or Venmo on the invoice** in [Step 10: the fee and the close](#). If you picked **Waived**, void the invoice instead (same page).

If you had the task **Fee not paid · NAME**, close it:

1. In the left menu, click **Tasks. My Tasks** opens.
2. Click the row **Fee not paid · NAME**. 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.

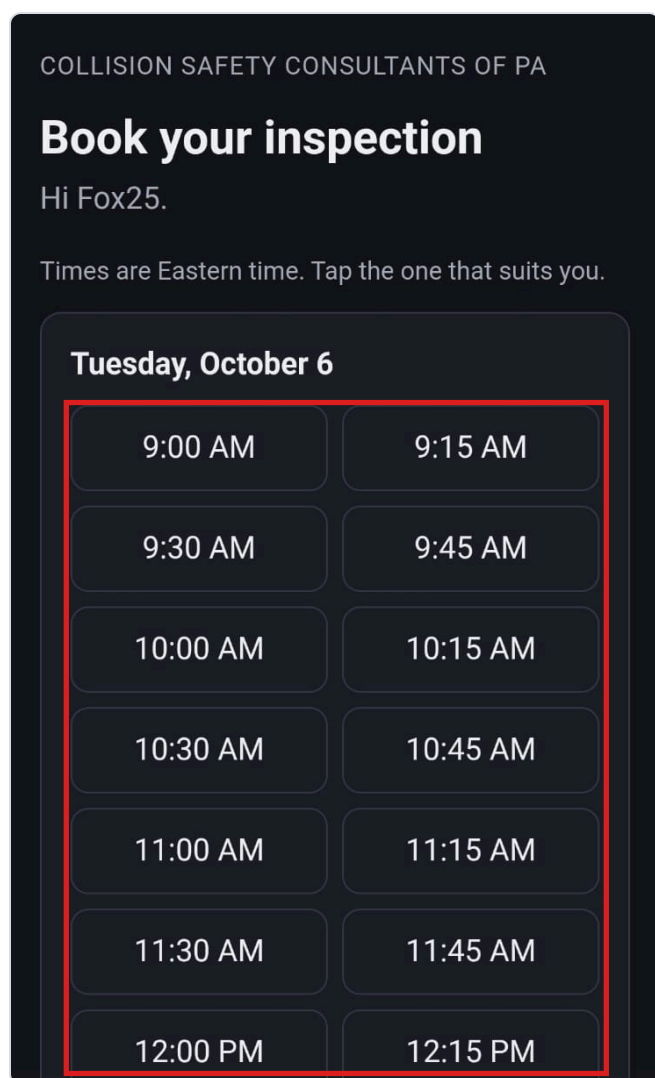
If the task is already gone when you come back, pdrOS closed it because the step happened.

Other words for this: short pay = the shop was shorted, the carrier underpaid the repair; the rewrite = the re-estimate, the corrected estimate; CCC1 = the estimating system; the shop = the body shop, the referring shop.

Post-repair inspection: booking the visit

Answers: how does a customer book an inspection? how do I book one for them? how do I move, cancel or mark a no-show? how do I send the agreement before the visit?

An inspection at the office is booked by the customer from the link pdrOS texts them. Or you book it from the **Appointments** icon on the right edge of their contact profile. A travel inspection is booked by you after a call. Confirmations, the day-before reminder and the signing request go by themselves.



Picture: The booking page on a customer's phone, with the free times.

COLLISION SAFETY CONSULTANTS OF PA

Book your inspection

Hi Fox25.

Your inspection:

**Tuesday, October 6 at 9:00 AM
(Eastern)**

At the main lobby of 101 Woodbine Rd,
Downingtown, PA 19335.

Book this time

Pick another time

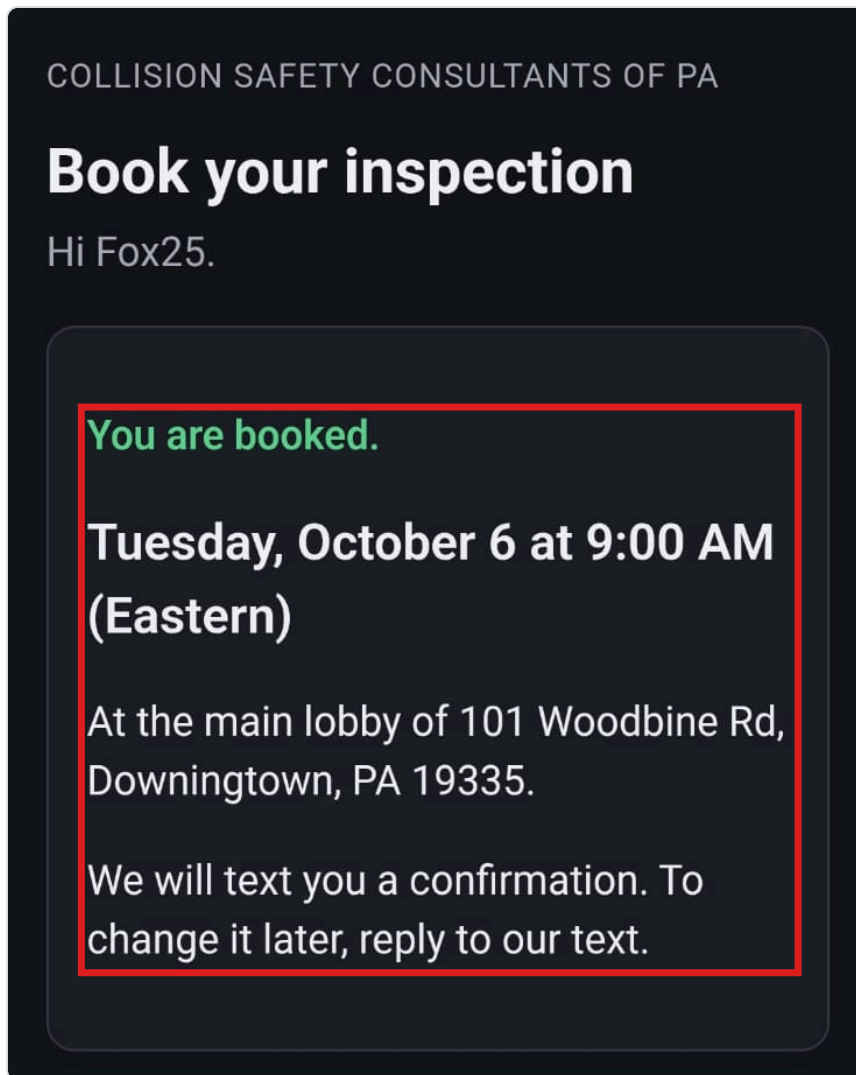
Picture: The booking page after a time is picked: Book this time and Pick another time.

Office or travel

The signup form asks **Inspection location**. The answer is kept in folder **SHORT PAY & INSPECTION** on the contact profile, field **Inspection location (Our office or Travel)**. - **Our office**: the customer gets the booking text ("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 the booking link, and the email "Book your post-repair inspection". - **Travel**: \$600 is added as **Travel fee** (same folder); the customer gets "You asked us to come to you for the inspection: John Hayduk will call you to agree a day, a time and the address"; you get the task **Call to book the inspection - NAME**.

The booking page

The customer's link opens a page headed "Book your inspection" with "Hi NAME." It shows the free times (Monday to Friday, 9 to 4, from tomorrow, four weeks out) under "Times are Eastern time. Tap the one that suits you." They tap a time, read "Your inspection: ... At the main lobby of 101 Woodbine Rd, Downingtown, PA 19335." and tap **Book this time** (or **Pick another time**). The page then says "You are booked. We will text you a confirmation. To change it later, reply to our text." The booking lands on their own contact profile.



Picture: The booking page after booking: You are booked, at the main lobby of 101 Woodbine Rd.

Booking it yourself

Use this for travel inspections and for any customer who would rather you did it. Always book from the customer's contact profile.

You can also start from the task. In the left menu, click **Tasks**. Click the row **Call to book the inspection** - **NAME**, 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 start at step 4.

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 **Appointments** icon (a calendar). Hold the mouse over the small icons to see their names. You are in the right place when the panel's title reads **Appointments**.
5. Click + **Add** at the top of the panel. A small menu opens; click **Meetings**. The **Book appointment** window opens.
6. Under **Calendar**, make sure it reads **Inspections Calendar** (if not, click the box and pick it).
7. Under **Date & time**, click the box under **Date** and pick the day.
8. Click the box under **Slot** and pick a free time.
9. Click the blue **Book appointment** button at the bottom right.

Book appointment

Calendar
Inspections Calendar

Appointment title
{{contact.name}}

Add description

Team member
Calendar Default

Date & time
Showing slots in this timezone: (Account timezone)
GMT-04:00 US/Eastern (EDT)

Default Custom

Date Slot
Mon, Oct 5th, 2026 9:00 AM - 10:00 AM

Meeting location
Calendar default Custom

Status: Confirmed

Attendees
1

Contact
Fox20 Zztest
Oct 5, 9:00 AM - 10:00 AM
Contact's local time (US/Eastern)

Internal notes
+ Add internal note

Cancel Book appointment

**1 Calendar 2 Date and Slot
3 blue Book appointment**

Picture: The Book appointment window: Calendar set to Inspections Calendar, Date and Slot, and the blue Book appointment button circled.

Appointments

+ Add

Search by Calendar Name

Upcoming

+ Add, then Meetings

No past appointment

Completed appointments will appear here.

Meetings
Services
Rentals

Picture: The Appointments icon (a calendar) on the right edge circled, and the + Add menu with Meetings circled.

If you booked it from the task **Call to book the inspection · NAME**, close the task:

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 row **Call to book the inspection · NAME** (click **Due Today** or **Overdue** at the top if you do not see it). 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.

Calendars in the left menu is for looking only. In the left menu, click **Calendars** and your week of inspections shows. Never book there by typing a name: it makes a second customer with no case. See [Calendar](#).

What happens when it is booked, within a minute

1. The case moves to **2.1 Inspection booked; Case status** (folder **CASE**) reads "Your inspection is booked for [date time] at our office."
2. The customer gets the confirmation text ("Meet us in the main lobby of 101 Woodbine Rd... unless we agreed to come to you") and the email "Your inspection is booked".
3. If they have not signed the agreement: "One thing before we meet, please read and sign the inspection agreement" and the agreement link.
4. The booking reminders stop.

If nobody books

Reminders with the booking link go on day 2 and day 12. You get **Call to book the inspection · NAME** on day 5 and **Nothing after three weeks · close it? · NAME** on day 19. A booking stops them. For the day-5 task, call the customer, then book it and close the task with the steps in **Booking it yourself** above. For the day-19 task, call once more or close the case as **Went quiet** (steps in [Step 1: the documents](#)), then mark the task complete.

The day before

The customer gets "your inspection is tomorrow, [date time], in the main lobby of 101 Woodbine Rd... Bring the car and the repair paperwork." If still unsigned, the signing text and link again.

One hour before, still unsigned

Your phone gets "NAME arrives at [time] and has not signed the agreement. Have them sign on your phone: [link]". When they arrive, tap the link in that text and hand them your phone to sign.

Moving the time

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 **Appointments** icon (a calendar). You are in the right place when the panel's title reads **Appointments**.
5. Click the three dots at the right of the appointment and pick **Edit**. The **Edit details** panel opens.
6. Under **Date & time**, click **Date** and pick the new day, then click **Slot** and pick the new time.
7. Click **Save** at the bottom right of the panel.

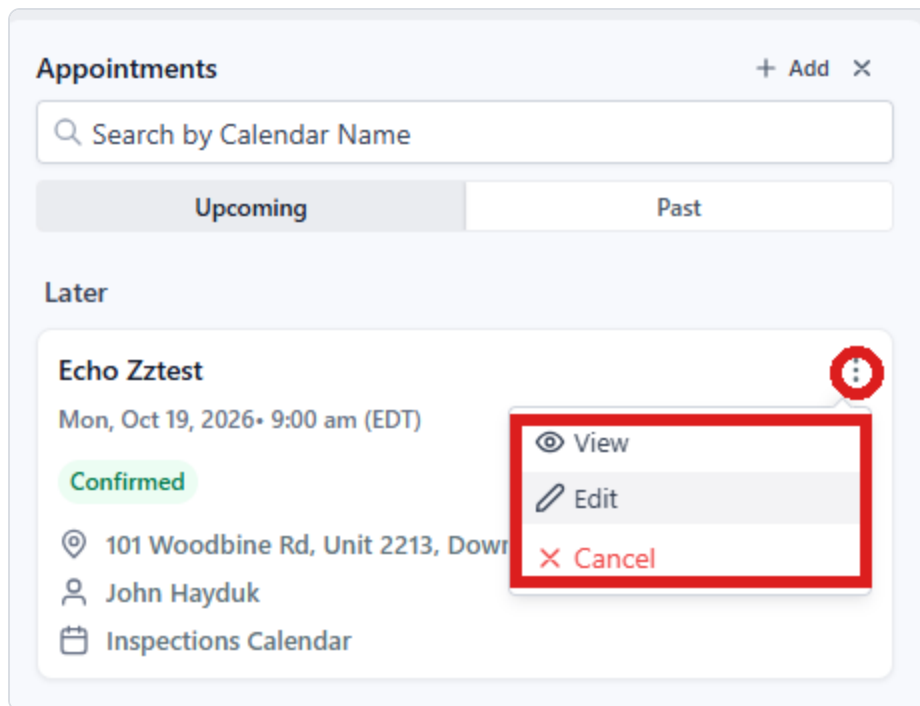
The customer gets a fresh confirmation for the new time, and the day-before reminder follows the new time.

Cancel or no show

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 **Appointments** icon (a calendar). You are in the right place when the panel's title reads **Appointments**.
5. To cancel: click the three dots at the right of the appointment and pick **Cancel**.

To mark a no show instead:

1. Click the three dots at the right of the appointment and pick **Edit**. The **Edit details** panel opens.
2. At the bottom of the panel, click the box next to **Status** and pick **No show**.
3. Click **Save** at the bottom right.



Picture: An appointment card on the right edge: its three dots open with View, Edit and Cancel.

Edit details

Appointment title
Echo Zztest

Calendar
Inspections Calendar

Calendar type: 8-8 Personal booking ⓘ

Team member
John Hayduk

Date & time

Showing slots in this timezone: (Account timezone)
GMT-04:00 US/Eastern (EDT)

☐ Also update Contact timezone to US/Eastern ⓘ

Default Custom

Date Slot

Mon, Oct 19th, 2026 9:00 AM - 10:00 AM

Date and Slot
Meeting location

☒ Calendar default
As confirmed in the calendar

☐ Custom
Set specific to this appointment

⊕ Add ⓧ Cancelled
☹ Showed
☹ No show
🗑 Invalid

Status

Status: ☒ Confirmed

Cancel Save

Picture: The appointment's Edit details panel: Date and Slot, and the Status box at the bottom, circled.

Within a minute: 1. The customer gets "your inspection did not go ahead. No problem: pick a new time with the link in my next text, or reply TRAVEL", and the booking link. 2. Your phone gets "NAME cancelled or missed the inspection". 3. The case goes back to **1.1** and the booking reminders start again.

A new booking runs the confirmations again.

Signing before the visit

If they want to sign before booking, text them the agreement link from their contact profile:

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 **FORM LINKS** and click the folder's name to open it. (If you already see its fields, it is open: clicking its name again closes it.)
5. Click in the box under **REPAIR AUTHORIZATION LINK**. Do not type anything in this box; you are only copying.
6. Press **Ctrl** and **A** together to select the whole link (on a Mac, **Cmd** and **A**).
7. Press **Ctrl** and **C** together to copy it (on a Mac, **Cmd** and **C**).
8. At the bottom of the middle of the contact profile is the message box. At its left end, click the small button with a down arrow and pick **SMS**.
9. Click in the box and press **Ctrl** and **V** together to paste the link (on a Mac, **Cmd** and **V**). Send the link alone, with no words around it.
10. Click the paper-plane button at the right end to send.

If a blue **Save** button appeared at the bottom of the left side after step 5, you changed the link by mistake: do not click it. Click **Cancel** next to the blue **Save** button; the field goes back to what it was.

When they sign, the case records the signature and sends the invoice; the booking confirmations then come without the signing request.

A booking by someone with no case

If a name is typed straight into the Calendar, the person gets nothing and you get "NAME booked an inspection but has no appraisal case. Open their contact and send them the Appraisal Case Signup link". To do that:

1. Press **Ctrl** and **T** together (on a Mac, **Cmd** and **T**). A new browser tab opens.
2. Click your bookmark named "Signup" (see [Your three links](#)). Your signup page opens.
3. Click in the address bar at the top of the browser.
4. Press **Ctrl** and **A** together to select the link (on a Mac, **Cmd** and **A**).
5. Press **Ctrl** and **C** together to copy it (on a Mac, **Cmd** and **C**).
6. Close that tab. You are back in pdrOS.
7. In the left menu, click **Contacts**.
8. Click in the search box at the top of the list and type the name from the text.
9. Click the person's name in the list. Their contact profile opens. You are in the right place when you see their name at the top left.
10. At the bottom of the middle of the contact profile is the message box. At its left end, click the small button with a down arrow and pick **SMS**.
11. Click in the box and press **Ctrl** and **V** together to paste the link (on a Mac, **Cmd** and **V**). Send the link alone, with no words around it.

12. Click the paper-plane button at the right end to send.

Other words for this: post-repair inspection = PRI, a look at the repair, a quality inspection; booking = the appointment, the visit; travel = we come to you, a mobile inspection.

Post-repair inspection: the visit and the report

Answers: what do I do at the inspection? how do they sign at the visit? how do I add the photos? how do I send the report? how do I record their decision?

At the visit the customer signs if they have not, you take photos, you write the report and upload it. pdrOS emails the customer the report and the photos and asks them what they want next.

At the visit

If they have not signed

On your phone:

1. Open the text "NAME arrives at [time] and has not signed the agreement. Have them sign on your phone: [link]".
2. Tap the link in it. The agreement opens.
3. Hand them your phone and let them sign.

The \$600 invoice (plus travel) goes by text and email as soon as they do.

No text on your phone? Open their agreement link on the computer:

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 **FORM LINKS** and click the folder's name to open it.
5. Click in the box under **REPAIR AUTHORIZATION LINK**. Do not type anything in this box; you are only copying.
6. Press **Ctrl** and **A** together to select the whole link (on a Mac, **Cmd** and **A**).
7. Press **Ctrl** and **C** together to copy it (on a Mac, **Cmd** and **C**).
8. Press **Ctrl** and **T** together (on a Mac, **Cmd** and **T**). A new browser tab opens.
9. Click in the address bar at the top of the browser.
10. Press **Ctrl** and **V** together to paste the link (on a Mac, **Cmd** and **V**).
11. Press **Enter**. The agreement opens.
12. Turn the screen to the customer and let them sign.

If a blue **Save** button appeared at the bottom of the left side after step 5, you changed the link by mistake: do not click it. Click **Cancel** next to the blue **Save** button; the field goes back to what it was.

The photos

Before you leave for the visit, send yourself the customer's upload link, so you can open it on your phone:

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. (If you already see its fields, it is open: clicking its name again closes it.)
5. Click in the box under **Appraisal Document Upload Link**. Do not type anything in this box; you are only copying.
6. Press **Ctrl** and **A** together to select the whole link (on a Mac, **Cmd** and **A**).
7. Press **Ctrl** and **C** together to copy it (on a Mac, **Cmd** and **C**).
8. Open your email in a new browser tab, as you normally do.
9. Start a new email to your own address.
10. Click in the message and press **Ctrl** and **V** together to paste the link (on a Mac, **Cmd** and **V**).
11. Send the email.

If a blue **Save** button appeared at the bottom of the left side after step 5, you changed the link by mistake: do not click it. Click **Cancel** next to the blue **Save** button; the field goes back to what it was.

← Contact Details

BZ Bravo Zztest

Owner: JH John Hayduk ×

Followers: [icon] v

Tags (11) [icon]

appraisal diminished value appraisal-docs-in appraisal-report-in appraisal-hired appraisal-demand-sent

5 more v

RO# DO NOT EDIT THIS!!
1010

RO Type
diminished value

All fields DND Actions

Q Appraisal Document Upload Link [icon]

CARRIER & APPRAISER ^

Appraisal Document Upload Link

https://link.bc3d.agency/widget/form/IThlGkjANhNI8YFWCTSo?contact_id=c4t

Picture: Folder CARRIER & APPRAISER open: Appraisal Document Upload Link circled.

At the visit, on your phone:

1. Open that email.
2. Tap the link. The customer's upload page opens.
3. Tap **Upload Photos Here**.
4. Pick the pictures from your phone.

pdrOS builds the photo report and gives you the task **Write the inspection report · NAME**. To open it: 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 and lists the case's documents; click **Scope Sheet Images (PDF)** (or **(HTML)** for the web page) and it opens in a new browser tab.

The report

Write the report, then upload it. You work from the task **Write the inspection report · NAME**.

You can also start from the task. In the left menu, click **Tasks**. Click the row **Write the inspection report · NAME**, 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 start at step 4.

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**.
6. Pick your report on your computer and click **Open**.
7. Click the blue **Save** button at the bottom of the left side.

Within a minute: 1. The case moves to **2.2 Inspection report sent**. 2. The customer gets the email "Your post-repair inspection report · [vehicle]" with the report and the photo page, and a text: "I've emailed you your inspection report and the photos. When you've read it, tell me: report only, or do you want us to take it on with the shop or the insurer?" 3. You get the task **Record their decision · NAME**.

Then close the report task:

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 row **Write the inspection report · NAME** (click **Due Today** or **Overdue** at the top if you do not see it). 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.

A file in the wrong box

On an inspection, the four document boxes do nothing (there is no documents step). They are **Carrier valuation report, Repair invoice, Shop estimate PDF** and **Carrier estimate PDF**, in folder **CASE**. Only **Upload Estimate Doc Here** (folder **Estimates**) moves the case. If your report went into a document box, upload it again with the steps in **The report** above.

Their decision

When they answer, set **Engaged against** and close the task **Record their decision · NAME**. The steps, and what each choice does, are on the next page: [Engaged against](#).

Post-repair inspection: Engaged against (the customer's choice)

Answers: the customer read the report, what do I set? what does Report only do? how do I send the demand on an inspection? what if I set None by mistake?

After the report, the customer chooses: report only, or take it on against the shop or the carrier. You record that in one field and pdrOS takes the right path.

Set it

You can also start from the task. In the left menu, click **Tasks**. Click the row **Record their decision · NAME**, 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 start at step 4.

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 **SHORT PAY & INSPECTION** and click the folder's name to open it. It is the fifth folder, right after **OUTCOME**. (If you already see its fields, it is open: clicking its name again closes it.)
5. Click the box under **Engaged against** ✕ and pick **None**, **Shop** or **Carrier** from the list.
6. Click the blue **Save** button at the bottom of the left side.

← Contact Details

All fields DND Actions

Q Search fields and folders

OUTCOME

SHORT PAY & INSPECTION

Shop estimate total
--

Carrier estimate total
--

Rewritten estimate total
--

Variance
--

Inspection location
--

Travel fee
--

Engaged against

None
Shop
Carrier

Picture: Folder SHORT PAY & INSPECTION open: Engaged against circled.

Then close the task **Record their decision · NAME:**

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 row **Record their decision · NAME** (click **Due Today** or **Overdue** at the top if you do not see it). 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.

The choice is made once; changing it later does nothing. If you set **None** by mistake, tell us the RO number at once (in the left menu, click **Support**, then the orange **Support Ticket** button). If the fee was already paid, the case has already closed and the customer got the review ask; we reopen it on our side. To find the RO number:

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.
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. At the top of the left side, under **Tags**, read the number next to **RO# DO NOT EDIT THIS!!**. pdrOS sets it; never change it.

None: report only

Outcome becomes **Report only**. Then pdrOS checks **Fee paid**. With the fee already paid, the case closes and the customer gets the review ask. With the fee at No, the case sits at 6.1 Fee due with the **Fee not paid · NAME** task until you set **Fee paid**:

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 how it was paid: **Square, Venmo, Check, Cash** or **Waived**.
6. Click the blue **Save** button at the bottom of the left side.
7. In the left menu, click **Tasks**. **My Tasks** opens.
8. Click the row **Fee not paid · NAME**. A short preview opens under it.
9. Click **Open Full View**.
10. 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.

If the money came by check, cash or Venmo, also record it on the invoice (Venmo as **Other**), so its reminders stop. The steps are in [Step 10: the fee and the close](#). If you picked **Waived**, void the invoice (same page).

Shop or Carrier: you take it on

Within a minute: 1. The case is marked engaged and **Claim side** (folder **CASE**) is set to **Claimant** (pdrOS does this itself, whatever was picked at signup). 2. The customer gets "We'll take it on from here: John Hayduk is preparing the demand and I'll keep you posted at every step." 3. You get the task **Send the demand · inspection · NAME**. 4. If the **Date of Loss** is known and there is no **Statute**

deadline yet, the deadline is set to two years after the date of loss. The customer gets the deadline text, and you will get alerts 14 days and 3 days before the deadline. (**Date of Loss** is in folder **FORM | Repair Authorization; Statute deadline** is in folder **CARRIER & APPRAISER**.)

The demand on an inspection

Against the carrier

Make the demand and upload it to **RTA or demand PDF**. Type the claim number and the adjuster's email, then set **Send demand** to **Send it now**. From here it runs like a diminished value case (the demand pack, the demand chase, counters). One difference: no settlement summary goes to the customer.

You can also start from the task. In the left menu, click **Tasks**. Click the row **Send the demand · inspection · NAME**, 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 start at step 4.

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. Look at **Claim #**. If it is empty, click in the box under **Claim #** and type the claim number.
6. Scroll down to the folder **FORM | Repair Authorization** and click the folder's name to open it.
7. Look at **Date of Loss**. If it is empty, click the box under **Date of Loss** and pick the accident day in the calendar that opens.
8. Scroll up to the folder **CASE** and click the folder's name to open it.
9. In **RTA or demand PDF**, click **Click to upload**.
10. Pick your demand on your computer and click **Open**.
11. Scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it.
12. Look at **Adjuster name**. If it is empty, click in the box under **Adjuster name** and type the adjuster's name (the email greets them by it).
13. Look at **Adjuster email**. If it is empty or wrong, click in the box under **Adjuster email** and type the adjuster's email.
14. Click the blue **Save** button at the bottom of the left side.
15. Scroll up to the folder **CASE** (just above **CARRIER & APPRAISER**) and go to the top of the folder, where the Send switches are.

16. Click the box under **Send demand** ⌵ and pick **Send it now** from the list.
17. Click the blue **Save** button at the bottom of the left side.
18. In the left menu, click **Tasks**. **My Tasks** opens.
19. Click the row **Send the demand · inspection · NAME**. A short preview opens under it.
20. Click **Open Full View**.
21. 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.

If **Send demand** comes back **Not sent (see task)**, the ⚠ **Demand not sent** task names what is missing. Fix it with the steps under **If it will not send** in [Step 4: the RTA](#).

Against the shop

You send your letter to the shop yourself. Then set **Send demand** to **I sent it myself** (or pick the day in **RTA or demand sent date**). pdrOS only moves the case to 3.1 and writes the note "Letter to the shop sent by John himself"; no chase, no text to the customer.

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 folder **CASE**, where the Send switches are.
6. Click the box under **Send demand** ⌵ and pick **I sent it myself** from the list.
7. Click the blue **Save** button at the bottom of the left side.

Or pick the date instead:

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 **RTA or demand sent date** and pick the day you sent the letter in the calendar that opens.
6. Click the blue **Save** button at the bottom of the left side.

Either way, close the task **Send the demand · inspection · NAME**:

1. In the left menu, click **Tasks. My Tasks** opens.
2. Click the row **Send the demand · inspection · NAME**. 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.

After the letter, pdrOS sends nothing more for you: you deal with the shop yourself. When the shop gives you a figure, type it in **Their number**; as on any case, that gives you the task **Negotiate · NAME** and a text:

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 **Their number** ✂ and type their figure (numbers only, no dollar sign).
6. Click the blue **Save** button at the bottom of the left side.

Settlement on an inspection

Typing the **Award amount** and picking the **Award signed date** settle it. The customer gets the Settled text and email, and **Outcome** is set to **Settled**. No customer summary goes (Send summary is refused on this type). Setting **Fee paid** to **Venmo, Check, Cash, Square** or **Waived** then closes the case and sends the review ask.

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 the award was signed in the calendar that opens.
7. Click the blue **Save** button at the bottom of the left side.

When the fee is 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.
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 how it was paid: **Square, Venmo, Check, Cash** or **Waived**.
6. Click the blue **Save** button at the bottom of the left side.
7. If you have the task **Fee not paid · NAME**: in the left menu, click **Tasks. My Tasks** opens.
8. Click the row **Fee not paid · NAME**. A short preview opens under it.
9. Click **Open Full View**.
10. 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.

If the money came by check, cash or Venmo, also record it on the invoice (Venmo as **Other**), so its reminders stop. The steps are in [Step 10: the fee and the close](#). If you picked **Waived**, void the invoice (same page).

Sarah: the texting assistant on the 610 number

Answers: what does Sarah answer? what does she never say? when does she hand a customer to me? how do I reply myself? how do I switch her off or on for one customer? how do I let a customer who replied STOP get texts again? what happens when a customer calls the 610 number?

Sarah answers your customers' texts and emails: where their case stands, what you need from them, how the process works. She never gives a figure, a settlement date or the other side's name, and she hands figures, offers and decisions to you (fee questions and requests to move an inspection go to Sharon as tasks).

Who she talks to

- Customers with an open case, on the 610 number, by text and by email.
- Not strangers (a number with no case gets one message asking who they are, and you get a text).
- Not adjusters, appraisers or shops (their emails go to their own conversations and to you).
- Not closed cases (she is switched off at the close).

What she answers herself

- **Status:** she reads the field **Case status** (folder **CASE**). It holds one sentence on where the case stands, for example "Case opened. We have sent you what we need from you to get started."
- What we need, how long it takes, whether to bring the car in (no, except a post-repair inspection), what an umpire is, whether there is a deadline, how to pay, and the questions in her list.
- A document request: she may send the customer their own agreement link.

What she never does

- Give a dollar figure, a settlement date, or the adjuster's or appraiser's name.
- Promise an outcome or a date.
- Book or move an appointment herself.

When she hands to you

She hands over when a customer asks what to do about an offer or a release, what the umpire decided or when their own deadline is, about court, or asks for a person. She tells the customer John will come back to them and texts you ("Sarah handed NAME to you (vehicle, type). The bot is asleep on it for 8 hours. Their last message is in the case conversation"). Sharon gets the task **Sarah handover**; you get **User query**. She stays quiet on that customer for eight hours, then wakes by herself. Money questions and requests to move an inspection go to Sharon as their own tasks (below).

To reply to the customer yourself:

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 contact profile, read the middle. The newest messages are at the bottom.
5. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **SMS** for a text or **Email** for an email.
6. Click in the box and type your answer. For an email, the box grows to show the subject line; type a subject too.
7. Click the paper-plane button at the right end to send.
8. 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.
9. Find the row of the task **User query** (it is one line: what the customer asked).
10. Check the box at the left of its row. That marks it complete; this short task has no **Open Full View** button.

The office tasks she creates (Sharon)

Each with the facts and the steps, and an alert to the office phone (Sharon's cell):

- **Customer has a money question** · NAME
- **Customer wants a date or an update** · NAME
- **Customer gave new contact or case details** · NAME
- **Customer asked for a document** · NAME
- **URGENT** · unhappy customer · call within the hour · NAME
- **Sarah needs a person** · NAME (most often to move or cancel an inspection)
- **Sarah handover** · NAME (she stepped back for 8 hours; John also gets a one-line **User query** task with what the customer asked)

Sharon does the step, comes back to the Tasks page and clicks **Mark Complete**. The list with what each one means: [The tasks you will see](#).

When a customer calls the 610 number

1. The call rings your cell. Pick up as you always do.

2. If you do not pick up, the caller hears your pdrOS voicemail greeting.
3. If the caller has an open case, pdrOS texts them within a minute: "Sorry we missed your call. What can I help with on your case? Text me here and I'll answer, or get John Hayduk to call you back." Sarah answers whatever they text back, and you get her handover text if it needs you.
4. If the caller has no open case, nothing is sent to them. Your phone gets "missed call from (phone), not on an open case".
5. Every call shows in the customer's thread, in the middle of their contact profile, with the time.

The word refund

Any text or email from a customer containing "refund" goes straight to you: an URGENT text, the task **URGENT • refund request** and a note, open case or closed. Sarah may also answer politely; you call.

Switching her off or on for one customer

Sarah's on/off switch is not on your screen; it is ours. When you want to handle a customer yourself for a while, tell us: in the left menu, click **Support**, then the orange **Support Ticket** button, with the customer's name and "please switch Sarah off". We do it within the hour, and switch her back on when you say.

You do not need to switch her off to answer a customer yourself: anything you type in the message box goes out as you, and Sarah goes quiet by herself for eight hours after she hands a customer to you.

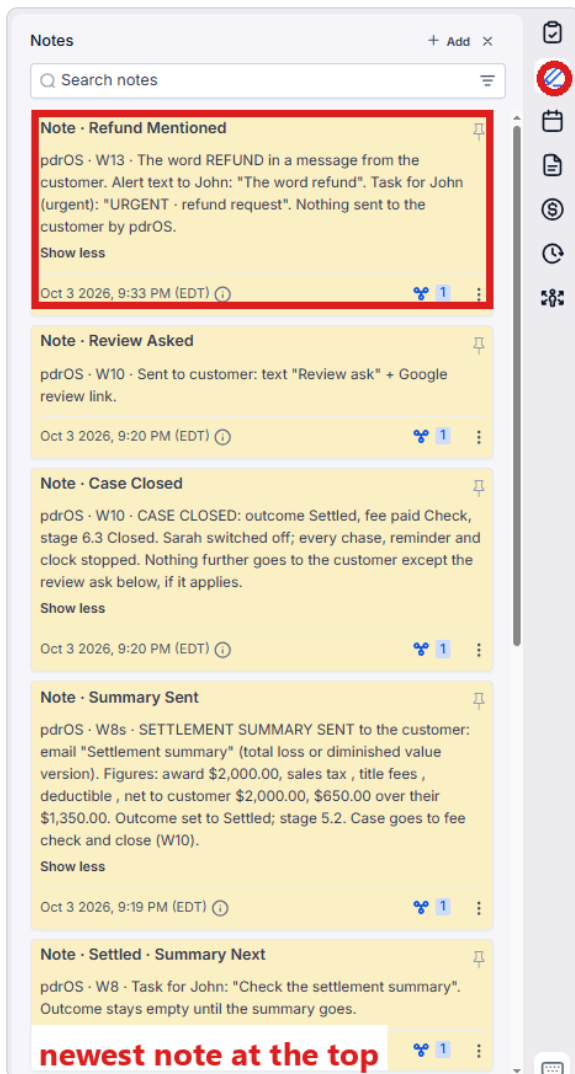
What to do when she texts you

The text on your phone names the customer and the case number. Read the messages and her note first, then answer the customer.

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 the case number from the text.
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 contact profile, read the middle. The newest messages are at the bottom.
5. 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.
6. Read Sarah's newest note. It says who she sent the question to and why.
7. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **SMS** for a text or **Email** for an email.

8. Click in the box and type your answer.

9. Click the paper-plane button at the right end to send.



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

Three things to tell customers

- Text the **610 number**, not John's cell.
- The first text from the office comes within two minutes of signup. If it did not come, see "If the first text did not come" below.
- If a customer replied STOP, texts to them are off. If they later ask in writing to get texts again, see "If a customer who replied STOP wants texts again" below, or tell us (in the left menu, click **Support**, then the orange **Support Ticket** button).

If the first text did not come

If the consent box was left empty on purpose and their **DND** is set to **Text Messages**, that customer is on email only, so no text is expected. Otherwise, check the phone number:

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. Click in the search box at the top of the left side (it reads **Search fields and folders**) and type **Phone**.
5. Read the number in the box under **Phone**.
6. If it is wrong, click in that box and delete the old number.
7. Type the right number.
8. Click the blue **Save** button at the bottom of the left side.
9. Tell us: in the left menu, click **Support**, then the orange **Support Ticket** button. Give the RO number and write "please restart the intake, the phone number was wrong". We do it on our side within the hour. The welcome and the first request go then.

If a customer who replied STOP wants texts again

Do this only when they asked in writing.

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, under the RO number, click the tab **DND**. It sits next to the tab **All fields**.
5. Look at the list: **DND All Channels**, then **Email, Text Messages, Calls & voicemail, Inbound Calls and SMS**. A checked box means that channel is blocked.
6. If the box next to **Text Messages** (or **DND All Channels**) is checked, click it to uncheck it. The change saves by itself; the middle of the profile notes "DnD disabled".
7. Click the tab **All fields** to go back to the folders.

← Contact Details

BZ Bravo Zztest

Owner

John Hayduk

Followers

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

All fields

DND

Actions

DND

DND All Channels

OR

Email

Text Messages

Calls & voicemail

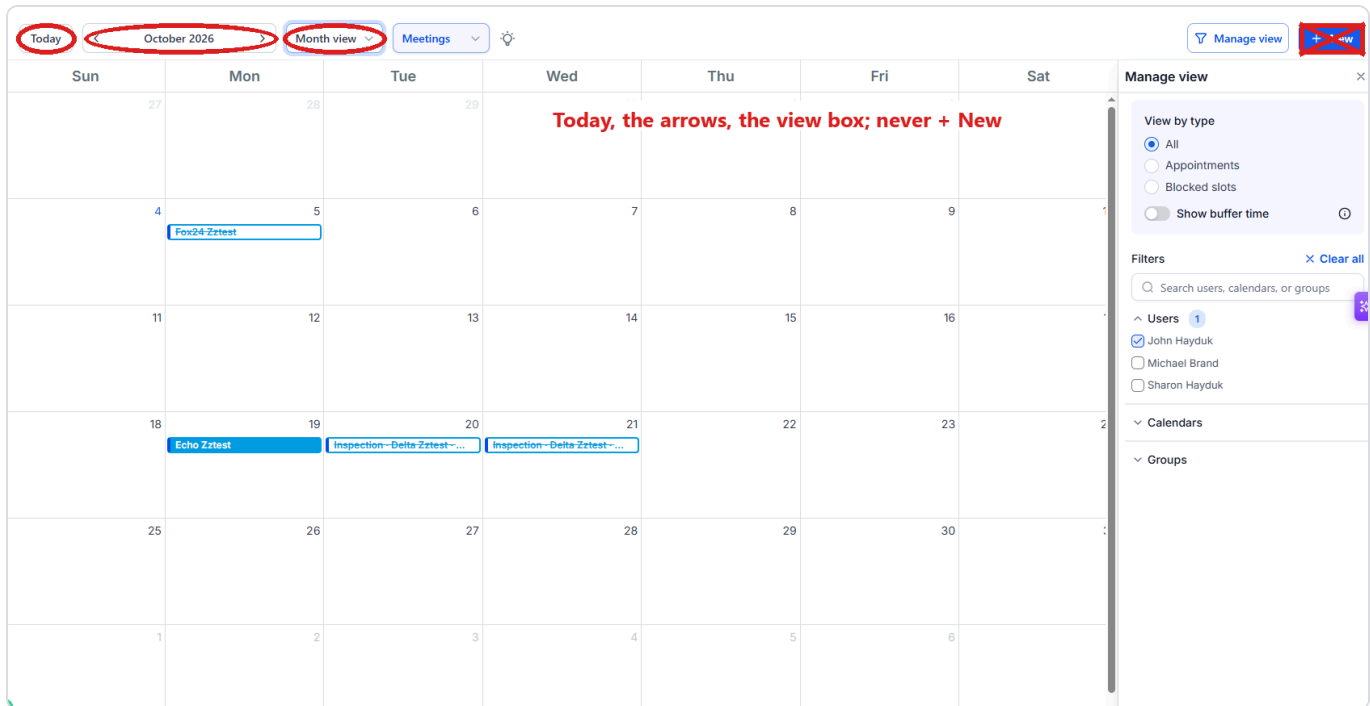
Inbound Calls and SMS

Picture: The DND tab open: the Text Messages box circled, unchecked.

Calendar: look here, book from the contact profile

Answers: what do I use the calendar for? why not book from the calendar? where do I book, move or cancel an inspection?

The **Calendars** screen shows every inspection at a glance. Use it to see your week. Book, move, cancel and mark no-shows from the customer's contact profile, with the **Appointments** icon on its right edge.



Picture: Calendars: the month of inspections, with Today, the arrows and the Month view box circled, and the blue + New button crossed out.

What to look at

1. In the left menu, click **Calendars**.
2. Your week of inspections shows. You are in the right place when you see the days of the week with your inspections in them.
3. To move to another week, click **Today** or the arrows.
4. To see one day or a whole month, click the **Week view** box and pick **Day view**, **Week view** or **Month view**.
5. Click an appointment to see its details.
6. To open the customer, click their name in the details. 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.

Leave the **Meetings** list and the **Manage view** panel alone; they only change what the screen shows.

Each inspection on the **Inspections Calendar** shows the customer's name and RO number (your case number) in its title. Office hours on it are Monday to Friday, 9 to 4; customers can book from the next day up to four weeks out.

What never to do here

- **Never book here by typing a name.** It makes a second customer with no case, and you get the alert "booked an inspection but has no appraisal case". Book from the contact profile (below).
- Leave the tab **Calendar settings** alone; the hours are ours. If the hours need to change, tell us (in the left menu, click **Support**, then the orange **Support Ticket** button).

What to do instead: book from the contact profile

First open the customer's appointments:

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 **Appointments** icon (a calendar). You are in the right place when the panel's title reads **Appointments**.

Then, to book a new inspection:

1. Click + **Add** at the top of the panel. A small menu opens; click **Meetings**. The **Book appointment** window opens.
2. Under **Calendar**, make sure it reads **Inspections Calendar** (if not, click the box and pick it).
3. Under **Date & time**, click the box under **Date** and pick the day, then the box under **Slot** and pick a free time.
4. Click the blue **Book appointment** button at the bottom right.

Or, to move one:

1. Click the three dots at the right of the appointment and pick **Edit**. The **Edit details** panel opens.
2. Under **Date & time**, click **Date** and pick the new day, then click **Slot** and pick the new time.
3. Click **Save** at the bottom right of the panel.

Or, to cancel one or mark a no show:

1. To cancel: click the three dots at the right of the appointment and pick **Cancel**.

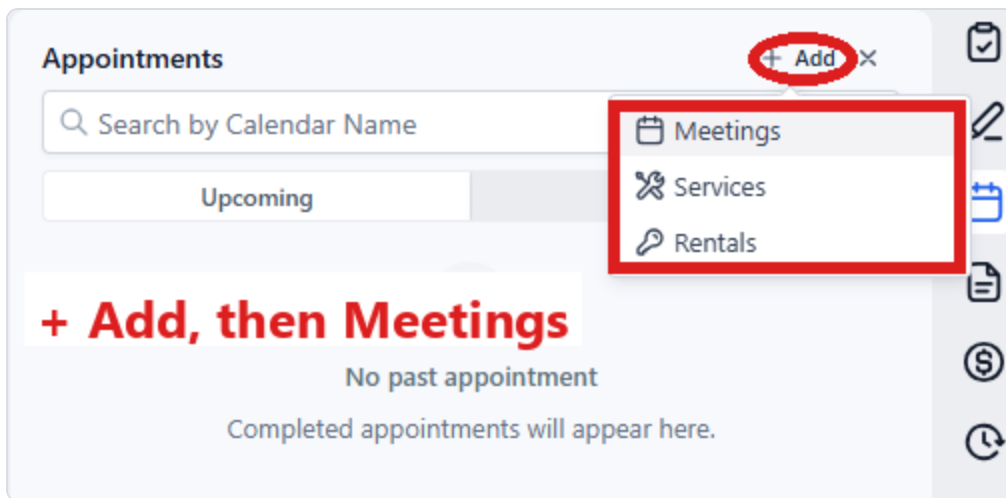
To mark a no show instead:

1. Click the three dots at the right of the appointment and pick **Edit**. The **Edit details** panel opens.
2. At the bottom of the panel, click the box next to **Status** and pick **No show**.
3. Click **Save** at the bottom right.

The screenshot shows the 'Book appointment' window. On the left, the 'Calendar' dropdown is set to 'Inspections Calendar' (highlighted with a red box). Below it, the 'Appointment title' field contains '{{contact.name}}'. The 'Team member' dropdown is set to 'Calendar Default'. Under 'Date & time', the 'Showing slots in this timezone: (Account timezone)' is set to 'GMT-04:00 US/Eastern (EDT)'. The 'Date' field shows 'Mon, Oct 5th, 2026' and the 'Slot' field shows '9:00 AM - 10:00 AM' (both highlighted with a red box). The 'Meeting location' is set to 'Calendar default'. At the bottom, the 'Status' is set to 'Confirmed'. On the right, the 'Attendees' section shows '1' attendee. The 'Contact' section shows 'Fox20 Zztest' with the time 'Oct 5, 9:00 AM - 10:00 AM'. The 'Internal notes' section has a '+ Add internal note' button. At the bottom right, there are 'Cancel' and 'Book appointment' buttons. The 'Book appointment' button is highlighted with a red circle. Red text annotations are present: '1 Calendar 2 Date and Slot 3 blue Book appointment'.

**1 Calendar 2 Date and Slot
3 blue Book appointment**

Picture: The Book appointment window: Calendar set to Inspections Calendar, Date and Slot, and the blue Book appointment button circled.



Picture: The Appointments icon (a calendar) on the right edge circled, and the + Add menu with Meetings circled.

What follows each of these (the customer's texts, the case moving) is in [Booking](#).

Invoices and payments

Answers: how is the fee invoiced? how do I send a custom invoice or invoice a shop? how do I record Venmo or a check? how do I copy the pay link? how do I void or refund? what do the invoice statuses mean? what is the fee guard?

pdrOS invoices the standard fee through Square the moment the customer signs. You record Venmo and checks on the customer's contact profile, in the field **Fee paid**. 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).

Invoices
Create and manage all invoices generated for your business

Settings + New

Connect at least one payment gateway to start receiving payments

Integrate Payment Gateway

0 Invoice(s) in Draft
\$0.00

2 Invoice(s) in Due
\$1,200.00

0 Invoice(s) received
\$0.00

2 Invoice(s) Overdue
\$1,800.00

Start Date → End Date Search

Invoice Name	Invoice Number	Customer	Issue Date ↑	Amount	Status	
Appraisal fee + travel	INV-000002	EZ Echo Zztest	Oct 2, 2026	\$1,200.00	Overdue	⋮
Appraisal fee	INV-000001	KZ Kitcheck Zztest	Oct 1, 2026	\$600.00	Overdue	⋮
Appraisal fee	INV-000004	DZ Delta Zztest	Oct 3, 2026	\$600.00	Due In 1 Day(S)	⋮
Appraisal fee	INV-000003	AZ Alpha Zztest	Oct 3, 2026	\$600.00	Due In 1 Day(S)	⋮

the three dots at the right end of a row: Copy Link, Void, Record Payment

Previous 1 Next 10 / page

Picture: Invoices: the list with each invoice's status, the three dots at the right end of one row circled.

The automatic invoice

When the customer signs, pdrOS sends the Square invoice "Appraisal fee" by text and email at once. It does this when the fee is the standard \$600 (or \$1,200 with travel) and the owner pays. The invoice is due the next day and has a pay-by-card link. The customer pays on their phone. When they do, **Fee paid** is set to Square for you and you get a text. Card payments run through Square, connected with us on your first day. If a card payment ever fails, tell us.

When no automatic invoice goes

- **Fee amount** is not the standard: you get the task **Send a custom invoice**.
- **Fee payer** is the shop: you get the task **Invoice the shop**.

For either one, first read the fee. 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 of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it. Read **Fee amount**. Then:

1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Click the blue + **New** button at the top right, then **New Invoice**. A new invoice opens.
3. Under **Customer Information**, click the box **Select Customer** and type the customer's name (for **Invoice the shop**, the shop's name).
4. Click the name in the list.
5. Under **Add Products**, click + **Add Product**.
6. Pick **Appraisal fee** from the list.
7. Click in the **Price** box on that line and type the fee from **Fee amount**. Numbers only, no dollar sign.
8. Click the blue **Send** button at the top right.
9. A window asks how to send it. Choose email and text, then click its send button.
10. 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.
11. Click the task's row. A short preview opens under it.
12. Click **Open Full View**.
13. 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.

Back New Invoice 11 / 100 Save Send

Connect at least one payment gateway to start receiving payments

Integrate Payment Gateway

Business & Customer Information
Add your business and the customer information to this template

Business Information
Collision Safety Consultants of PA
https://collisionsafetyconsultantspa.com

Customer Information
Select Customer

1 Select Customer

☐ Link Opportunity

Invoice Settings
Add invoice number and dates

Invoice Number * Issue Date * Due Date *

INV- 000006 2026-10-04 2026-10-18

Add Products
Choose products from your catalogue or add new products to this invoice ☐ Enable Tax Automatically

Item	Price	Quantity	Tax	Subtotal
+ Add Product				

Add products to your Invoice **2 + Add Product, then type the fee in Price**

3 blue Send

INVOICE
Collision Safety Consultants of PA
+16103007585
101 Woodbine Rd, Unit 2213
Downtown, PA
19335
US
https://collisionsafetyconsultantspa.com

Billed to Invoice Number INV-000006 Issue Date October 4, 2026 Due Date October 18, 2026

ITEM NAME	PRICE	QUANTITY	TAX	SUBTOTAL
Subtotal				\$0.00
Amount Due (USD)				\$0.00

Picture: A new invoice: the Select Customer box, + Add Product and the blue Send button circled.

Invoices
Create and manage all invoices generated for your business

Settings + New

+ New, then New Invoice start receiving payments

Integrate Payment Gateway

New Invoice
Send a one-time invoice to the customer right away.

New Recurring Invoice
Send a recurring invoice to the customer at scheduled intervals.

Import Invoices using CSV
Import existing invoices from other softwares

0 Invoice(s) in Draft \$0.00

2 Invoice(s) in Due \$1,200.00

0 Invoice(s) received \$0.00

2 Invoice(s) Overdue \$1,800.00

Picture: Invoices: the blue + New button and its menu, New Invoice circled.

Recording Venmo or a check

When the money arrives:

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. Find **Fee paid** ↯.
6. Click the box under **Fee paid** and pick **Venmo**, **Check** or **Cash**.

7. Click the blue **Save** button at the bottom of the left side.

← Contact Details

All fields DND Actions

Q Search fields and folders

Sent

Send summary

Sent

Appraiser

John Hayduk

Claim side

Claimant

Fee payer

--

Fee amount

\$ 750.00

Fee paid, list open

No

Square

Venmo

Check ✓

Waived

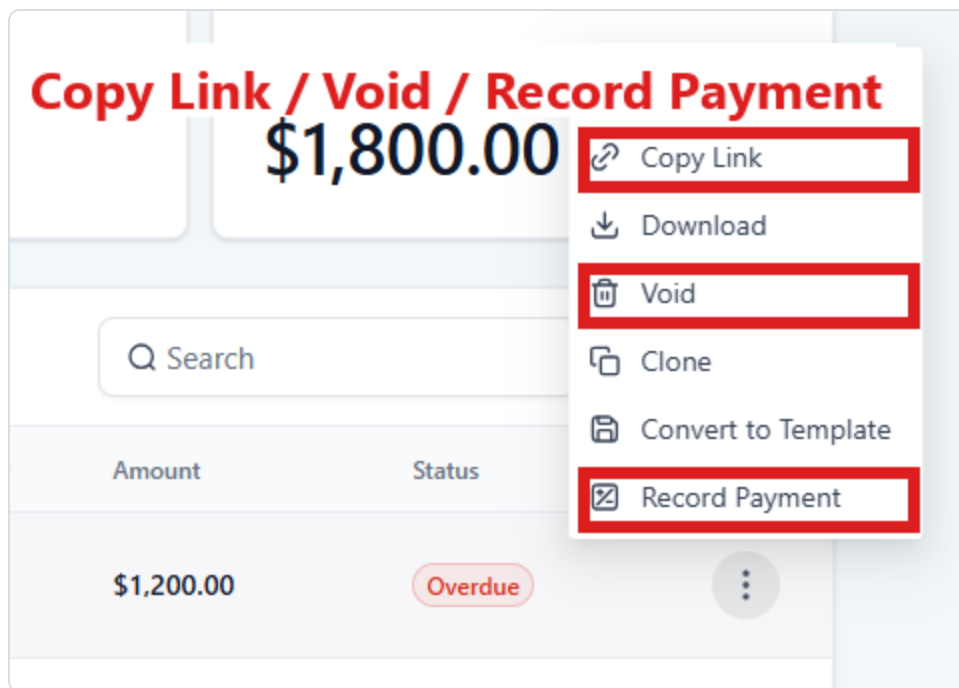
Cash

Picture: Folder CASE open: the Fee paid list open with No, Square, Venmo, Check, Waived, Cash.

If an open Square invoice went for that case, record the payment on it. Then the customer stops getting its reminders. Always set **Fee paid** first, then record the payment on the invoice. If the invoice is marked paid while **Fee paid** still says **No**, pdrOS writes **Square** in **Fee paid**. That is why **Fee paid** comes first. To record the payment:

1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Find the customer's name in the list.
3. Click the three dots at the right end of the invoice's row.
4. Click **Record Payment**.
5. Click **Record Manually**.
6. Pick **Check** for a check, **Cash** for cash, or the choice that fits Venmo (**Other** if it is offered).

7. Type the amount and the date.
8. Click **Submit**.



Picture: Invoices: the three dots at the right end of an invoice's row open, with Copy Link, Void and Record Payment circled.

Copying the pay link

If the customer cannot find the invoice text, send them its link again.

1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Find the customer's name in the list.
3. Click the three dots at the right end of the invoice's row.
4. Click **Copy Link**.
5. In the left menu, click **Contacts**.
6. Click in the search box at the top of the list and type the customer's last name or RO number.
7. 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.
8. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **SMS**.
9. Click in the box and press **Ctrl** and **V** together to paste the link (on a Mac, **Cmd** and **V**). Put nothing else in that text: a link mixed with words breaks on the phone.
10. Click the paper-plane button at the right end to send.

Waiving the fee

Waived closes the case like a payment.

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 **Waived**.
6. Click the blue **Save** button at the bottom of the left side.

If a Square invoice already went, void it:

1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Find the customer's name in the list.
3. Click the three dots at the right end of the invoice's row.
4. Click **Void**.

Voiding or refunding

Void an invoice only when you waive the fee (see Waiving the fee, above). If the customer paid another way, record the payment on it instead (see Recording Venmo or a check, above). Refund an invoice that was paid by card. A refund does not change the case.

To void:

1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Find the customer's name in the list.
3. Click the three dots at the right end of the invoice's row.
4. Click **Void**. A paid invoice must be refunded first.

To refund a card payment:

1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Find the customer's name in the list and click their invoice to open it.
3. Click the three dots at the top right of the invoice (next to **Save**).

4. Click **View Transaction** (it shows only on a paid invoice).
5. Click **Refund**. If you do not see **View Transaction**, tell us (in the left menu, click **Support**, then the orange **Support Ticket** button) and we refund it with you.

Refunding under the promise

The agreement promises a refund if the final value is not at least \$700 over the insurer's offer as it stood when they signed. If that happens, refund the fee, then add a note saying refunded under the promise. The case stays Settled. (A customer *asking* for a refund is a different thing: that raises the URGENT refund task, see [The tasks you will see.](#))

For a card payment, refund it on the invoice (if you refund by check or Venmo instead, start at step 6):

1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Find the customer's name in the list and click their invoice to open it.
3. Click the three dots at the top right of the invoice (next to **Save**).
4. Click **View Transaction** (it shows only on a paid invoice).
5. Click **Refund**. If you do not see **View Transaction**, tell us (in the left menu, click **Support**, then the orange **Support Ticket** button) and we refund it with you.

Then add the 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).
5. Click + **Add** at the top of the notes.
6. Type a title and the note: refunded under the promise.
7. Click **Save** in the note.

The fee guard

A settled case with **Fee paid** at No sits at **6.1 Fee due** with the task **Fee not paid**. Your phone gets a text at day 14. The Square invoice sends its own reminders to the customer. The task stays open. When the fee is in, set **Fee paid**, then mark the task complete:

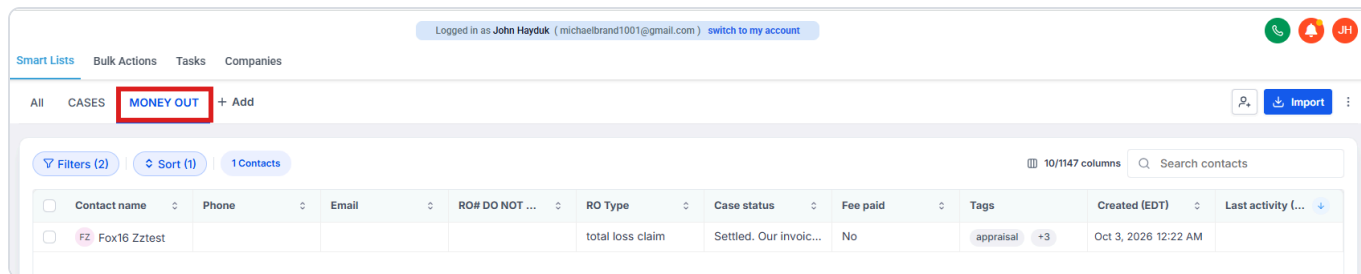
1. In the left menu, click **Contacts**.

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 how they paid: **Square, Venmo, Check** or **Cash** (or **Waived**).
6. Click the blue **Save** button at the bottom of the left side.
7. 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.
8. Click the task **Fee not paid**. A short preview opens under it.
9. Click **Open Full View**.
10. 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.

If they paid by Venmo or check, also record it on the invoice (see Recording Venmo or a check, above). Otherwise the invoice keeps reminding them.

The Money out list

Check it on Mondays.



Picture: Contacts: the saved lists along the top of the list, Money out circled.

1. In the left menu, click **Contacts**.
2. Along the top of the list are saved lists; click **Money out**.
3. It shows every hired case whose **Fee paid** is still **No**, in one list.

Where to see every invoice

1. In the left menu, click **Invoices**. You are in the right place when you see the list of invoices, each with its status.
2. Every invoice is listed with the customer, the amount and its status. Click an invoice to open it.

What each status means:

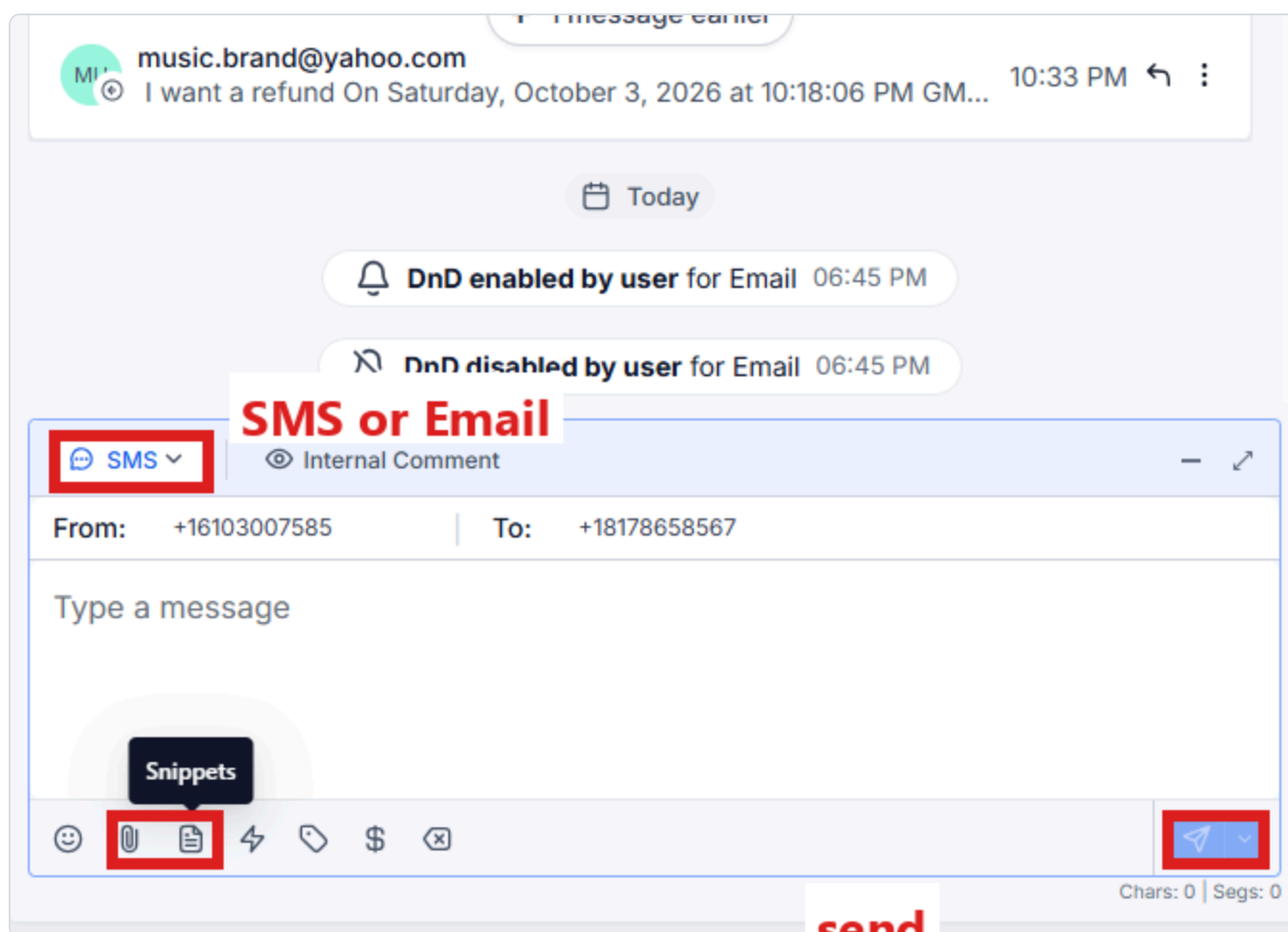
- **Draft:** made, not sent yet.
- **Due In 1 Day(S)** (or another number of days): sent to the customer, not paid yet.
- **Paid:** paid.
- **Overdue:** past its due date and not paid.
- **Void:** cancelled; nobody owes it.

The invoice email and text the customer got are also in the middle of their contact profile, with their other messages.

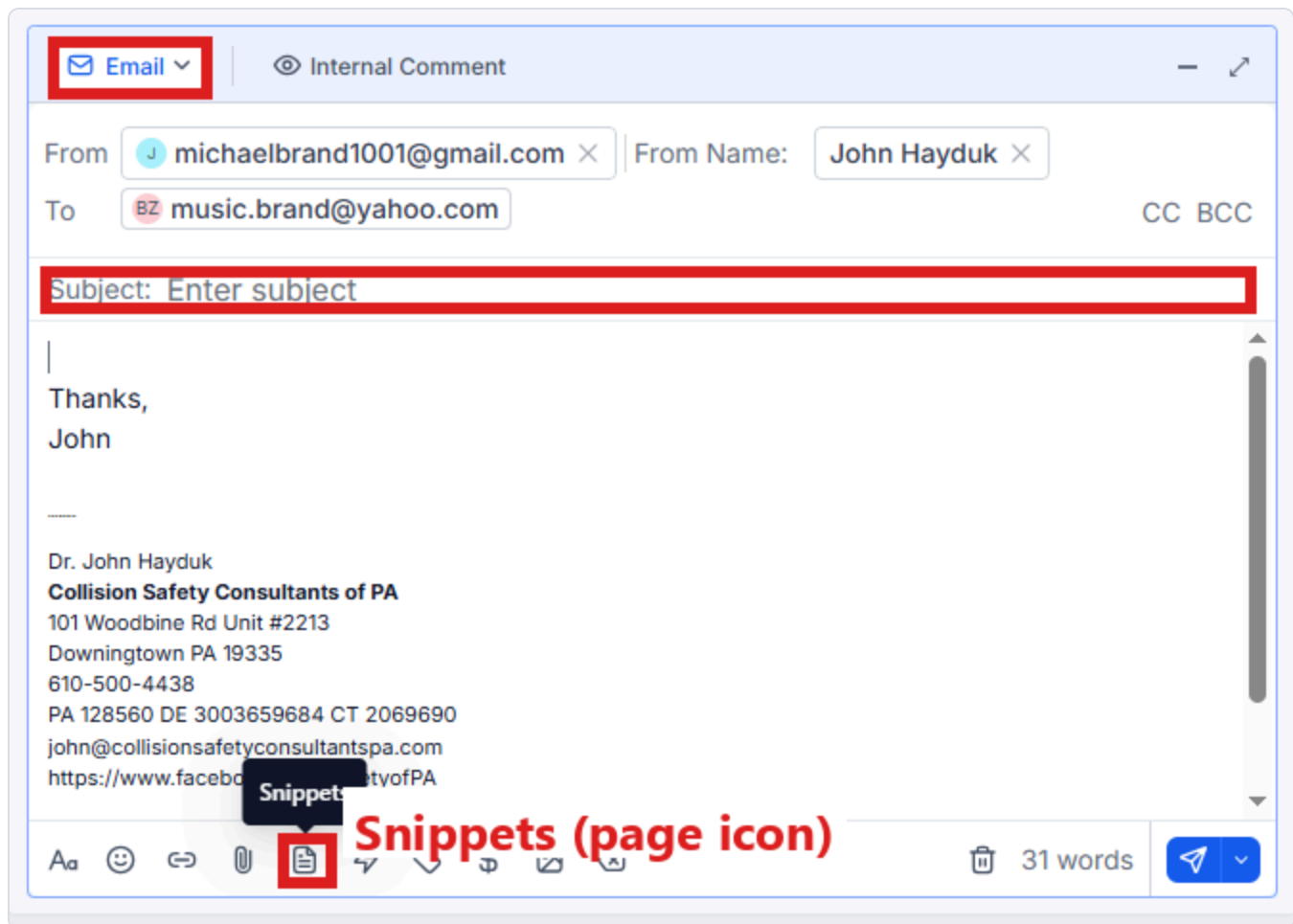
Emails and texts you send yourself

Answers: how do I send my own email or text? how do I use a saved reply or attach a file? where do I write to or reply to the adjuster? what does I sent it myself do? what is my email address?

Anything pdrOS does not send for you, you send yourself. To the customer: from the message box on their contact profile. To the adjuster, appraiser or shop: from their own thread in **Conversations**. If you send one of the five Send-switch emails by hand, tell pdrOS with **I sent it myself**.



Picture: The message box at the bottom of the middle: the button with the down arrow (SMS or Email), the Snippets icon, the paperclip and the paper-plane send button.



Picture: The email window: Email picked at the top left, the Subject line, and the Snippets icon (a page) at the bottom.

To the customer

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. At the bottom of the middle of the contact profile is the message box. At its left end, click the small button with a down arrow and pick **SMS** for a text or **Email** for an email.
5. For an email, the box grows to show the subject line; type a subject.
6. Click in the box and type. A text stays under 320 characters, and a link goes in a text of its own.
7. To use a saved reply instead, click the **Snippets** icon in the message box (hold the mouse over the small icons to find it). Pick the snippet and change anything that needs changing.
8. To attach a file, click the paperclip icon and pick the file.

9. Click the paper-plane button at the right end to send.

Their reply lands in the same place, the middle of their contact profile.

Your email address

Every email pdrOS sends for you, and every email you write from the message box, goes out from **john@collisionsafetyconsultantspa.com**, shown to the reader as "John Hayduk, Collision Safety Consultants of PA", with your signature. Replies do not go to a separate inbox: they come back into pdrOS, into the customer's thread (the middle of their contact profile) or the other side's own conversation, and your phone gets a text when the other side replies. You read and answer them in **Conversations** on the computer, or in the phone app (called LeadConnector in the app store) (same login).

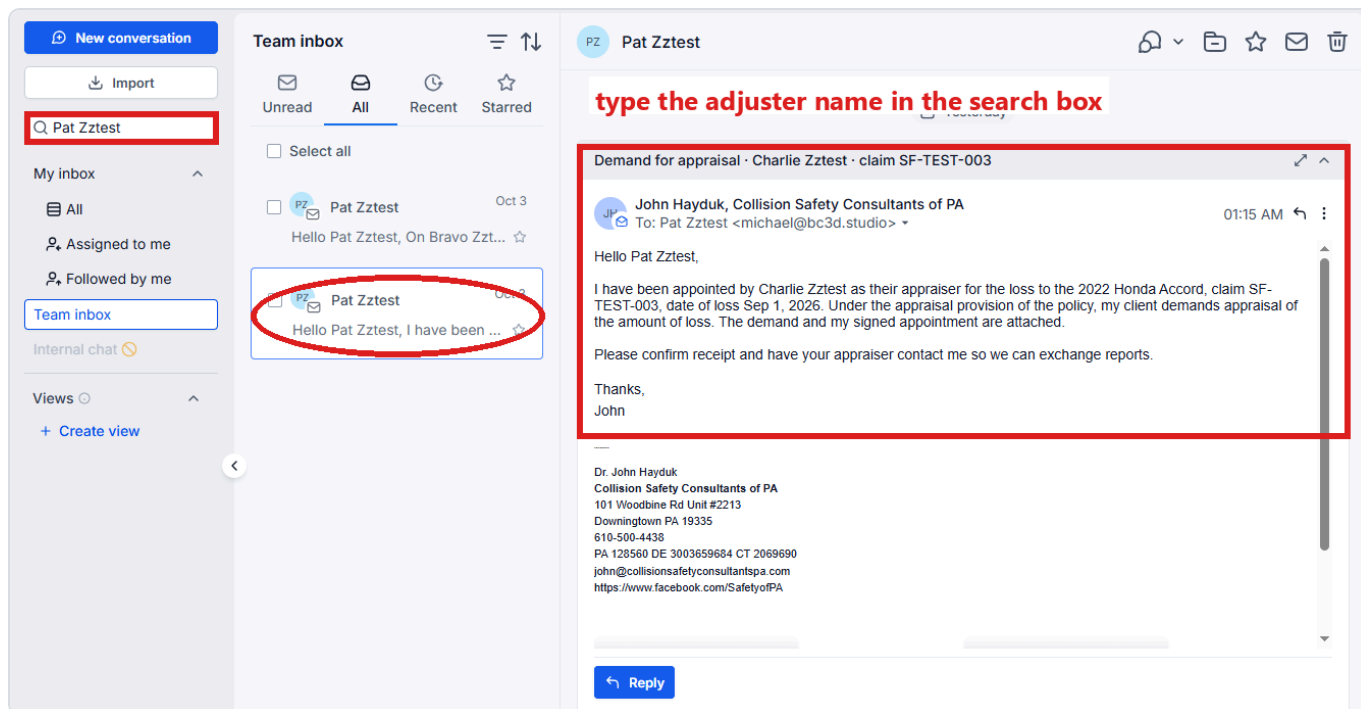
To the other side

The adjuster, the other appraiser and the shop each have their own conversation under their own name. pdrOS made it the first time it emailed them for you.

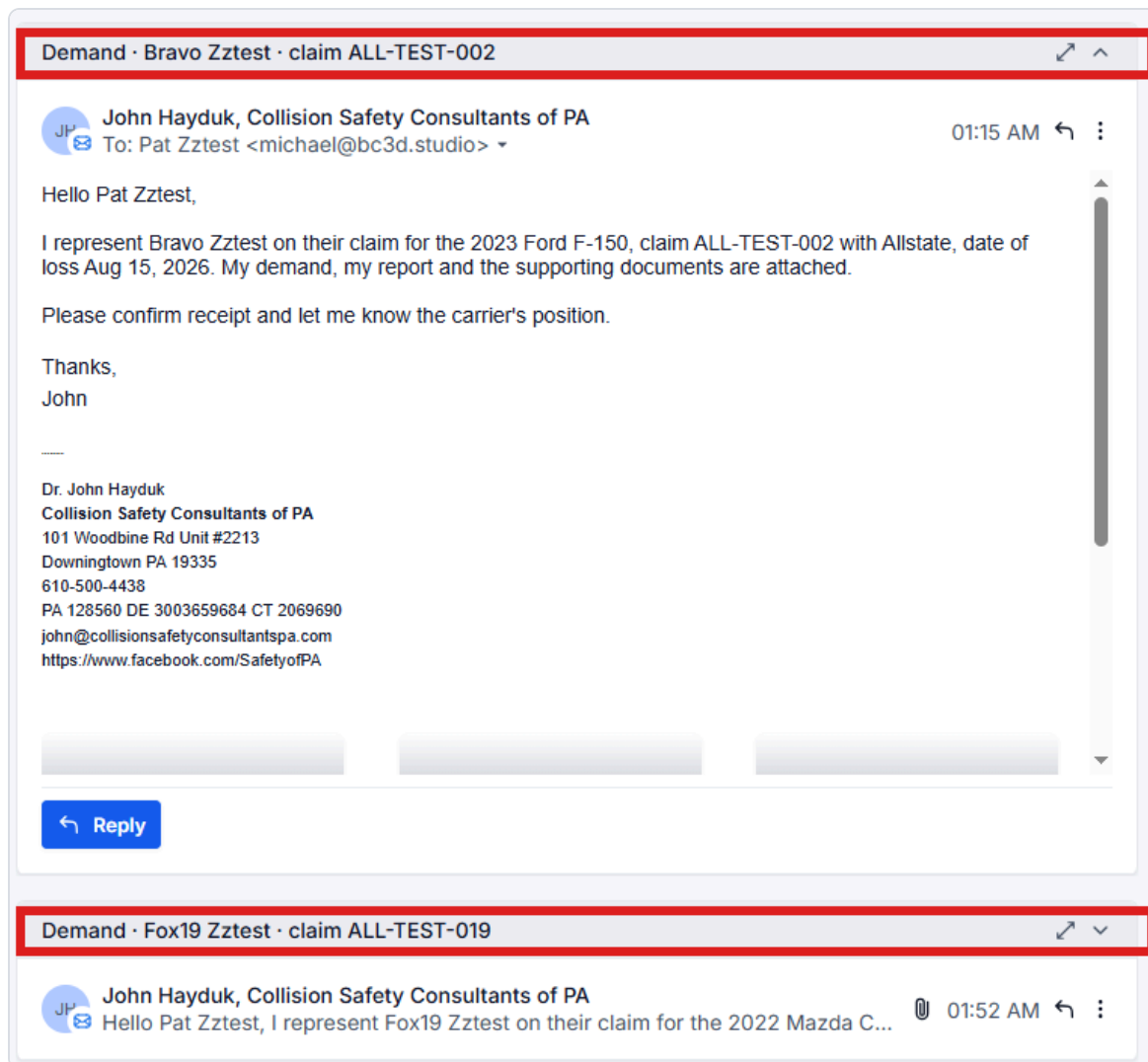
1. In the left menu, click **Conversations**.
2. On the left is the list of people. Find the person's name and click it. If you cannot see it, type their name in the search box above the list.
3. Their thread opens in the middle. You are in the right place when you see their name and the emails pdrOS sent them.
4. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **Email**.
5. Type a subject in the subject line.
6. Click in the box and type your email.
7. Click the paper-plane button at the right end to send.

Their replies come back to that thread, and your phone gets "NAME replied by email about one of your cases. Open Conversations → NAME to read it". Sarah never answers in those threads.

Why separate: it keeps the insurer's words out of the customer's messages, so Sarah can never answer an adjuster and the customer never sees a negotiation email by mistake.



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.

The five emails pdrOS writes for you

The range, the demand, your report, the counter and the settlement summary are written and sent by the Send switches. Let the switch send them: it attaches the right PDFs, writes the date and starts the clocks. If you did send one yourself, set that switch to **I sent it myself** so the case moves and the clocks start; nothing is sent twice.

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. The Send switches sit at the top, right after **Case status: Send range, Send demand, Send our report, Send counter, Send summary.**
6. Find the switch for the email you sent.
7. Click the box under it and pick **I sent it myself.**
8. Click the blue **Save** button at the bottom of the left side.

Saved replies (Snippets)

Your saved replies are under the **Snippets** icon in the message box. Their names start with "John ." so they sit together. Five texts: **Call you back, One more thing I need, Where your case stands, Moving our inspection, Got it, thanks.** Five emails: **To the adjuster, cover note, To the other appraiser, cover note, To the customer, where things stand, To the customer, still need from you, To a shop, thanks for the referral.** Each fills the customer's name and case details for you; the words in [square brackets] are the blanks you type over before you send. To change a wording, tell us; do not edit the texts and emails the system sends on its own.

To use one:

Open the customer's contact profile first (steps 1 to 3 under **To the customer** above). Then:

1. In the message box at the bottom of the middle, click the small button with a down arrow at its left end and pick **SMS** or **Email**.
2. Click the **Snippets** icon in the message box (hold the mouse over the small icons to find it).
3. Click the snippet. Its words land in the box.
4. Type over every [square bracket].
5. Click the paper-plane button at the right end to send.

Attachments

Where each PDF opens from:

Arrows mean: click this, then this.

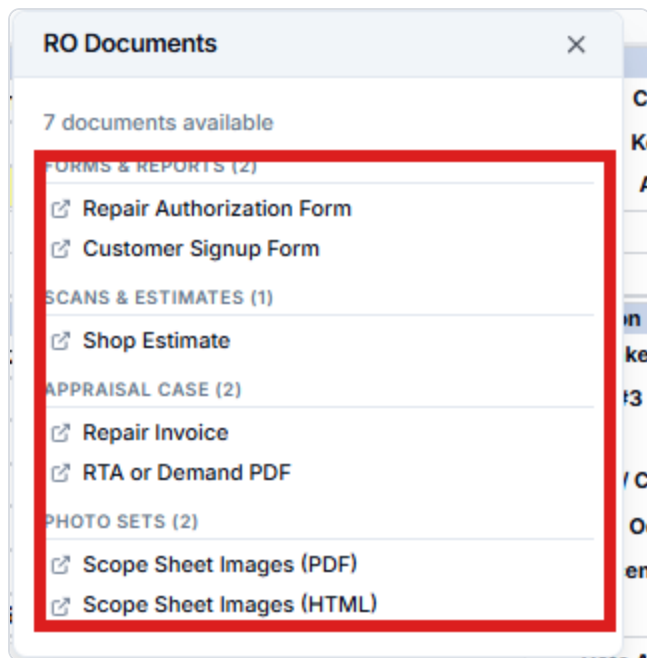
The file	Where to open it
Your report	RO Hub → the case (type the RO number in the box under RO #: , click Search) → Docs → Shop Estimate (pdrOS's body-shop name for your report); or contact profile, folder Estimates , click the file's name in Upload Estimate Doc Here
Their report	RO Hub → the case (type the RO number in the box under RO #: , click Search) → Docs → Supplement #1 Estimate (under SUPPLEMENT ESTIMATES); or contact profile, folder Supplements , click the file's name in Supplement #1 Upload Doc Here

The file	Where to open it
The photo report	RO Hub → the case (type the RO number in the box under RO #: , click Search) → Docs → Scope Sheet Images (PDF)
The signed agreement	RO Hub → the case (type the RO number in the box under RO #: , click Search) → Docs → Repair Authorization Form
The signup sheet	RO Hub → the case (type the RO number in the box under RO #: , click Search) → Docs → Customer Signup Form
Your RTA or demand	contact profile, folder CASE , click the file's name in RTA or demand PDF
The customer's uploads	contact profile, folder CASE , click the file's name in Carrier valuation report, Repair invoice, Shop estimate PDF or Carrier estimate PDF

To attach 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.
4. For your report, their report, your RTA or the customer's uploads: on the left side of the contact profile, scroll down to the folder the table names and click the folder's name to open it. Click the file's name in the field. The PDF opens in a new browser tab.
5. For the agreement, the signup sheet or the photo report: in the left menu, click **RO Hub**. Click in the box under **RO #:** at the top, type the RO number and click **Search**. Click the small **Docs** button, to the right of the **Contacts** button. In the **RO Documents** window, click the row the table names. The PDF opens in a new browser tab.
6. Save it to your computer: in that tab, click the download arrow at the top right.
7. Go back to the browser tab with the contact profile.
8. In the message box at the bottom of the middle, click the small button with a down arrow at its left end and pick **Email**.
9. Type a subject.
10. Click in the box and type your email.
11. Click the paperclip icon and pick the file you saved (it is usually in your Downloads folder).
12. Click the paper-plane button at the right end to send.

The **Documents** icon on the far right edge of the contact profile (a page) also lists every file on this customer. Click one to open it.



Picture: The RO Documents window: Forms & Reports, Scans & Estimates, Appraisal Case and Photo Sets, every row circled.

Replying to an adjuster's email

1. In the left menu, click **Conversations**.
2. On the left is the list of people. Find the adjuster's name and click it. If you cannot see it, type their name in the search box above the list.
3. Their thread opens in the middle. You are in the right place when you see their name and their email in the thread.
4. Click their email to open it in full.
5. Click **Reply** under the email.
6. Type your answer.
7. Click the paper-plane button at the right end of the message box to send.

Your reply goes from your address with the thread intact.

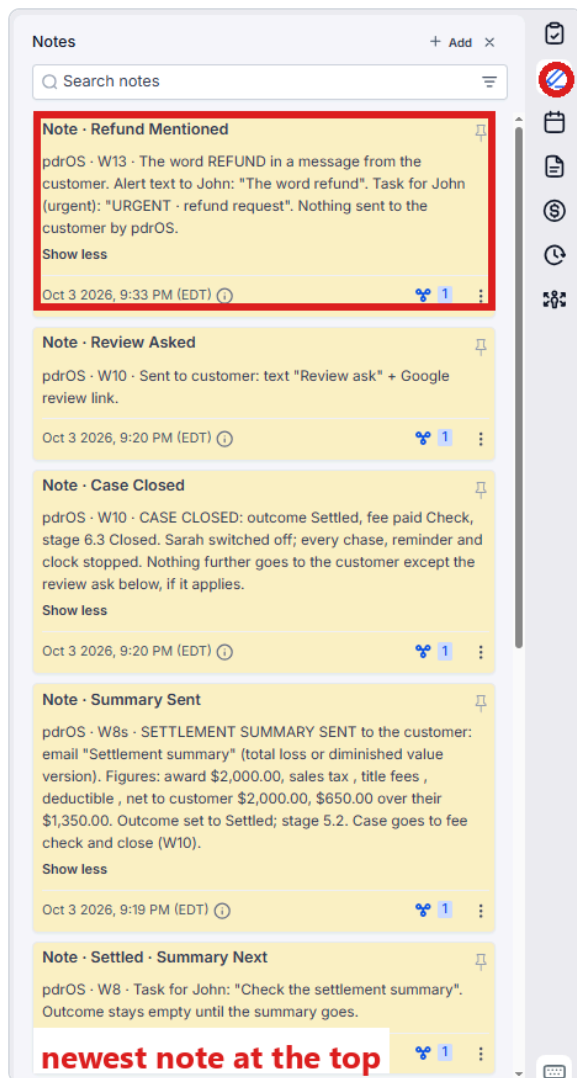
When something goes wrong: if this, then that

Answers: something did not happen, what do I check? a switch says Not sent, what now? the customer says they got nothing? no blue Save button appeared? the task was gone before I marked it complete?

Every situation we met in testing, what it means, and the fix, click by click. Start with the newest note on the customer's contact profile; it usually says what happened.

First: read 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 (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 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. Read the top note.

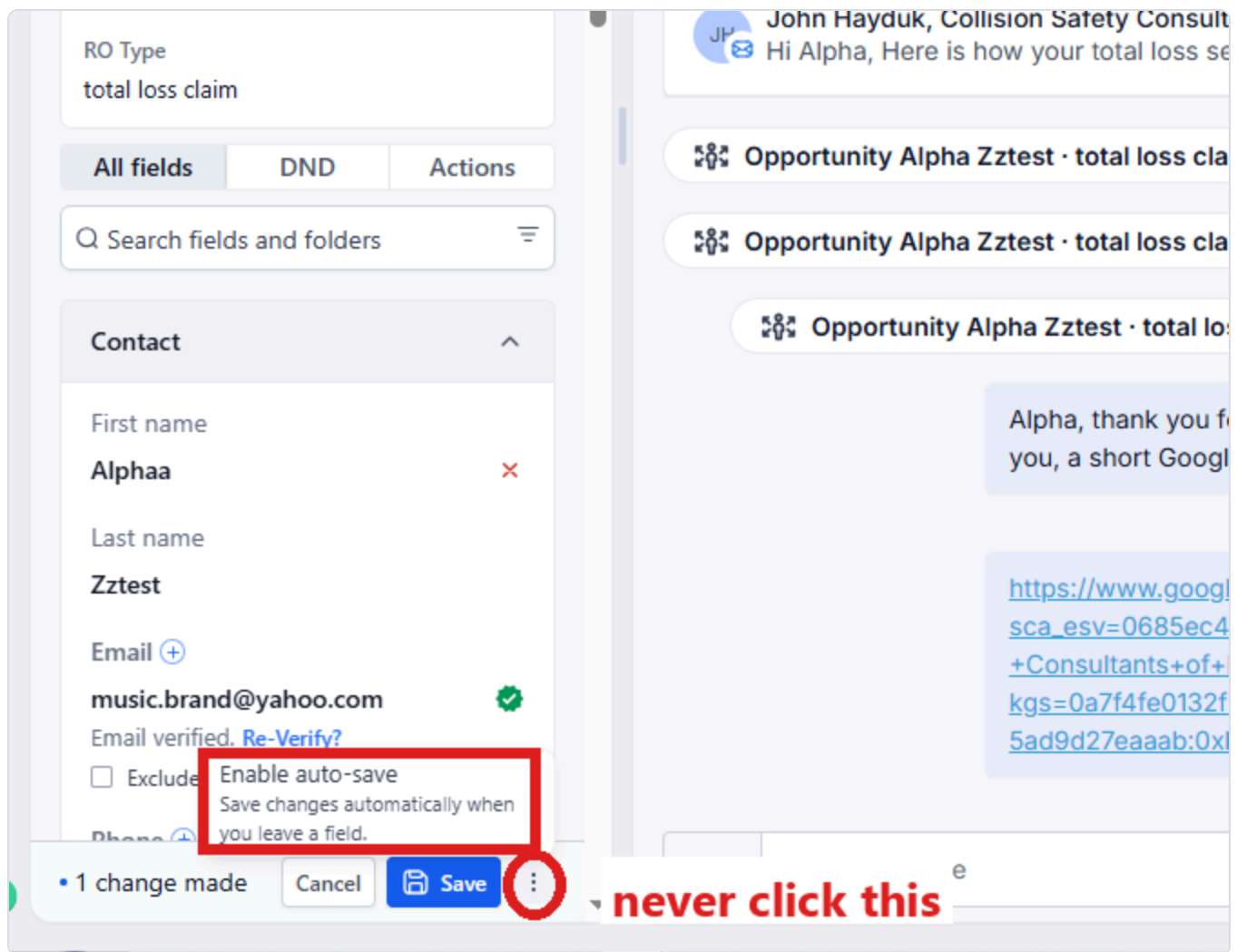


Picture: The Notes icon (a pen) on the right edge circled, the notes open beside it, newest at the top, + Add circled.

Saving

If you change a field and no blue Save button appears at the bottom of the left side, then 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).

If you changed a field and nothing happened, then check that you clicked 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.



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

Tasks

If a task is already gone when you come back to mark it complete, then pdrOS closed it because the step happened. Nothing to do. Only three tasks close themselves today: ⚠ **Demand not sent**, ⚠ **Our report not sent** and ⚠ **Counteroffer not sent** (they close when the email finally goes). Every other task waits for you. Do the step, then:

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.
5. Click **Close** to go back to the list.

Sending

If a switch reads "**Not sent (see task)**", then a field it needs is empty or wrong. The task names it:  **Demand not sent**,  **Our report not sent**,  **Counteroffer not sent**, or, for Send range and Send summary, **A Send switch could not act**.

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 that task's row. A short preview opens under it.
3. Click **Open Full View**. Read which field is missing.
4. Click the link under **WHERE**. 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.
5. On the left side, click in the search box at the top (it reads **Search fields and folders**) and type the missing field's name. The table below says which folder each one is in.
6. Fill the field. An amount: click in the box and type it (numbers only, no dollar sign). An email: click in the box and type it. A PDF: click **Click to upload** in the field, pick the PDF on your computer and click **Open**.
7. Click the blue **Save** button at the bottom of the left side.
8. Wait one minute.
9. Click in the search box at the top of the left side and delete what is there.
10. Type the switch's name (for example **Send demand**).
11. Click the box under the switch and pick **Send it now**.
12. Click the blue **Save** button at the bottom of the left side.

The three  tasks close themselves when the email goes. **A Send switch could not act** does not: go back to the Tasks page and click **Mark Complete**.

Where the fields the tasks name are. Arrows mean: click this, then this.

The task names	Where
RTA or demand PDF	Contacts → the customer → folder CASE → RTA or demand PDF
The signed agreement	folder CASE → Agreement signed date (empty means the customer has not signed; send them their agreement link again)
Claim #	Contacts → the customer → folder Insurance Info → Claim #
Date of Loss	Contacts → the customer → folder FORM Repair Authorization → Date of Loss
Adjuster email	Contacts → the customer → folder CARRIER & APPRAISER → Adjuster email (the adjuster's name only prints in the demand email; fill it before Send demand)

The task names	Where
Other appraiser email	Contacts → the customer → folder CARRIER & APPRAISER → Other appraiser email
Your report	Contacts → the customer → folder Estimates → Upload Estimate Doc Here
Counteroffer, Their number, My number	Contacts → the customer → folder CARRIER & APPRAISER → Counteroffer, Their number or My number

If a switch still reads **"Send it now"** after five minutes and your phone got **"...It did not go"**, then pdrOS missed your choice. This happens when you pick **Send it now** again within seconds of a **Not sent**. On a closed case, switches do nothing; tell us (in the left menu, click **Support**, then the orange **Support Ticket** button). Otherwise:

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 and find the switch that reads **Send it now**.
6. Click the box under the switch and pick **Not sent (see task)**. Never pick **I sent it myself** here: that one records a send you made by hand.
7. Click the blue **Save** button at the bottom of the left side.
8. Wait one minute.
9. Click the box under the switch again and pick **Send it now**.
10. Click the blue **Save** button at the bottom of the left side.
11. 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.
12. Click the row of the task **A Send switch did not go · NAME**. A short preview opens under it.
13. Click **Open Full View**.
14. Click the green **Mark Complete** button at the bottom right of the full view.

If the note says **"skipped: the same email went out less than 10 minutes ago"**, then nothing is wrong; it would have been a duplicate. Wait ten minutes if you really need a second copy.

If the demand is refused with **"it already went on [date]"**, then you are sending a second RTA. To send a corrected 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.
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**.
6. Click in the box under it. 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.
7. Click the blue **Save** button at the bottom of the left side.
8. Scroll up to the folder **CASE** and click the folder's name to open it.
9. If the RTA itself did not change, go to step 13.
10. In **RTA or demand PDF**, click the trash can icon to the right of the old file's name to remove it. Every file left there goes with the email.
11. Click **Click to upload**, pick the corrected PDF and click **Open**.
12. Click the blue **Save** button at the bottom of the left side.
13. Wait one minute.
14. At the top of the folder, click the box under **Send demand** and pick **Send it now**.
15. Click the blue **Save** button at the bottom of the left side.

If the other side says they got nothing, then look at their own conversation: the sent email is there with the time.

1. In the left menu, click **Conversations**.
2. On the left is the list of people. Find the person's name and click it. If you cannot see it, type their name in the search box above the list.
3. Their thread opens in the middle. You are in the right place when you see their name and the emails pdrOS sent them. The sent email is there with the time.
4. To forward it, click the email to open it in full.
5. Click the three dots at the top right of the email and pick **Forward Email**.
6. Type their email address in the box for the address.
7. Click the paper-plane button to send.

Or check their email address for a typo, fix it and send again:

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. Read **Adjuster email** if the demand went missing (or a counter on a claimant case). Read **Other appraiser email** if your report went missing (or a counter on an insured case).
6. If it is wrong, click in the box under it and delete the address.
7. Type the right address.
8. If it was the demand, also click in the box under **RTA or demand sent date** (same folder) and delete the date, so the box is empty.
9. Click the blue **Save** button at the bottom of the left side.
10. Wait one minute.
11. Scroll up to the folder **CASE** and click the folder's name to open it.
12. At the top of the folder, click the box under the switch that sent it and pick **Send it now**.
13. Click the blue **Save** button at the bottom of the left side.

Opening a case

If your phone says "the intake for NAME did not finish", then the signup did not get its RO number within ten minutes. Tell us: in the left menu, click **Support**, then the orange **Support Ticket** button (see [Getting help](#)). Give the customer's name and write "the intake did not finish, please fix it and restart the intake". We do it on our side within the hour; the welcome and the first request go then.

If it says "...picked hail, a shop type, so nothing was sent", then the wrong type was picked.

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 **REPAIR STATUS** and click the folder's name to open it.
5. Click the box under **RO Type** and pick the right appraisal type: **total loss claim, diminished value, short pay** or **post-repair inspection**.
6. Click the blue **Save** button at the bottom of the left side.
7. Tell us: in the left menu, click **Support**, then the orange **Support Ticket** button. Give the RO number and write "please restart the intake". We do it on our side within the hour.

If it says "submitted the signup on a closed case", then a past customer used their old link. If they have a new claim, send the plain signup link, alone in its own text.

1. Open [Your three links](#).
2. Select the signup link with the mouse.
3. Press **Ctrl** and **C** together to copy it (on a Mac, **Cmd** and **C**).
4. In the left menu, click **Contacts**.
5. Click in the search box at the top of the list and type the customer's last name or RO number.
6. 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.
7. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **SMS**.
8. Click in the box and press **Ctrl** and **V** together to paste the link (on a Mac, **Cmd** and **V**). Put nothing else in that text.
9. Click the paper-plane button at the right end to send.

If the customer says they got no text after signup, then check the phone number. (If you left the consent box empty on purpose and set their **DND** to **Text Messages**, that customer is on email only and no text is expected.)

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. Click in the search box at the top of the left side (it reads **Search fields and folders**) and type **Phone**.
5. Read the number in the box under **Phone**.
6. If it is wrong, click in that box and delete the old number.
7. Type the right number.
8. Click the blue **Save** button at the bottom of the left side.
9. Tell us: in the left menu, click **Support**, then the orange **Support Ticket** button. Give the RO number and write "please restart the intake, the phone number was wrong". We do it on our side within the hour.

Two cases, one phone

If a customer with two cases texts and the message lands on the older case, then that is how texting works: one phone number, one contact profile. Until we move the number, every text from that customer lands on the older contact profile. If the older case is closed, Sarah is off there and nobody answers. Tell us the day the new case opens (in the left menu, click **Support**, then the orange **Support Ticket** button); we move the phone number to the new case.

Fields

If you cleared Their number by mistake, then no harm is done; the newest note says "cleared". Type it again:

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 **Their number** and type the amount (numbers only, no dollar sign).
6. Click the blue **Save** button at the bottom of the left side.

If you typed a wrong award, then correct **Award amount** before you send the summary. The customer does not get the settled message a second time.

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**, delete the wrong amount and type the right one (numbers only, no dollar sign).
6. Click the blue **Save** button at the bottom of the left side.

If you need a date changed (a sent date, a signed date), then pick the right day in its place. Only clearing a sent date lets a switch send again; other dates are records.

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, click in the search box at the top (it reads **Search fields and folders**) and type the date's name (for example **Agreement signed date**).
5. Click the box under the date and pick the right day in the calendar that opens.
6. Click the blue **Save** button at the bottom of the left side.

If nothing happened after an upload, then pdrOS may still be working, or the file is in the wrong field. Your report goes in **Upload Estimate Doc Here** (folder **Estimates**); their report goes in **Supplement #1 Upload Doc Here** (folder **Supplements**).

1. Wait two minutes.
2. In the left menu, click **Contacts**.
3. Click in the search box at the top of the list and type the customer's last name or RO number.
4. 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.
5. 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.
6. Read the top note.
7. Still nothing: on the left side, scroll down to the folder **Estimates** (your report) or **Supplements** (their report) and click the folder's name to open it.
8. Look for the file's name in **Upload Estimate Doc Here** or **Supplement #1 Upload Doc Here**.
9. If it is not there, click **Click to upload** in that field, pick the PDF on your computer and click **Open**.
10. Click the blue **Save** button at the bottom of the left side.

If a customer's upload did nothing on an inspection, then that is right: an inspection does not wait for documents.

Messages

If a link broke in a text (only half of it is blue), then it was sent with words around it. Send the link again, alone in its own text. The agreement link is in folder **FORM LINKS**, field **REPAIR AUTHORIZATION LINK**. The upload link is in folder **CARRIER & APPRAISER**, field **Appraisal Document Upload Link**.

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 that holds the link and click the folder's name to open it.
5. Click in the box that holds the link.
6. Press **Ctrl** and **A** together to select the whole link (on a Mac, **Cmd** and **A**).
7. Press **Ctrl** and **C** together to copy it. Do not type in the box; if a blue **Save** button appears, do not click it: click **Cancel** next to it.
8. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **SMS**.
9. Click in the box and press **Ctrl** and **V** together to paste the link (on a Mac, **Cmd** and **V**). Put nothing else in that text.
10. Click the paper-plane button at the right end to send.

If the customer says they did not get an email, then look in the middle of their contact profile. The email shows as sent, with the time. Ask them to check spam for mail from Collision Safety Consultants of PA.

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 contact profile, scroll the middle to find the email. It shows as sent, with the time.

If Sarah said something odd, then reply yourself and tell us. Send us a screenshot (in the left menu, click **Support**, then the orange **Support Ticket** button, with the customer's name); we adjust her wording and switch her off for that customer if you ask.

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. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **SMS** for a text or **Email** for an email.
5. Click in the box and type your reply.
6. Click the paper-plane button at the right end to send.

If Sarah stopped answering a customer, then she handed over (she goes quiet for eight hours) or the case is closed. Answer yourself; if you want her back on sooner, tell us (in the left menu, click **Support**, then the orange **Support Ticket** button).

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. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **SMS** for a text or **Email** for an email.
5. Click in the box and type your answer.
6. Click the paper-plane button at the right end to send.

Booking

If someone booked with no case, then you got the alert; send them the signup link, or cancel the appointment.

To send the signup link:

1. Open [Your three links](#).
2. Select the signup link with the mouse.
3. Press **Ctrl** and **C** together to copy it (on a Mac, **Cmd** and **C**).
4. In the left menu, click **Contacts**.
5. Click in the search box at the top of the list and type the name from the alert.
6. Click the name in the list. Their contact profile opens. You are in the right place when you see their name at the top left.
7. At the bottom of the middle is the message box. At its left end, click the small button with a down arrow and pick **SMS**.
8. Click in the box and press **Ctrl** and **V** together to paste the link (on a Mac, **Cmd** and **V**). Put nothing else in that text.
9. Click the paper-plane button at the right end to send.

Or, to cancel the appointment:

1. In the left menu, click **Contacts**.
2. Click in the search box at the top of the list and type the name from the alert.
3. Click the name in the list. Their contact profile opens. You are in the right place when you see their name at the top left.
4. On the far right edge of the contact profile, click the **Appointments** icon (a calendar). You are in the right place when the panel's title reads **Appointments**.
5. Click the three dots at the right of the appointment and pick **Cancel**.

Anything else

Send us the RO number and what you expected: in the left menu, click **Support**, then the orange **Support Ticket** button ([Getting help](#)). The notes on the contact profile tell us the rest.

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:

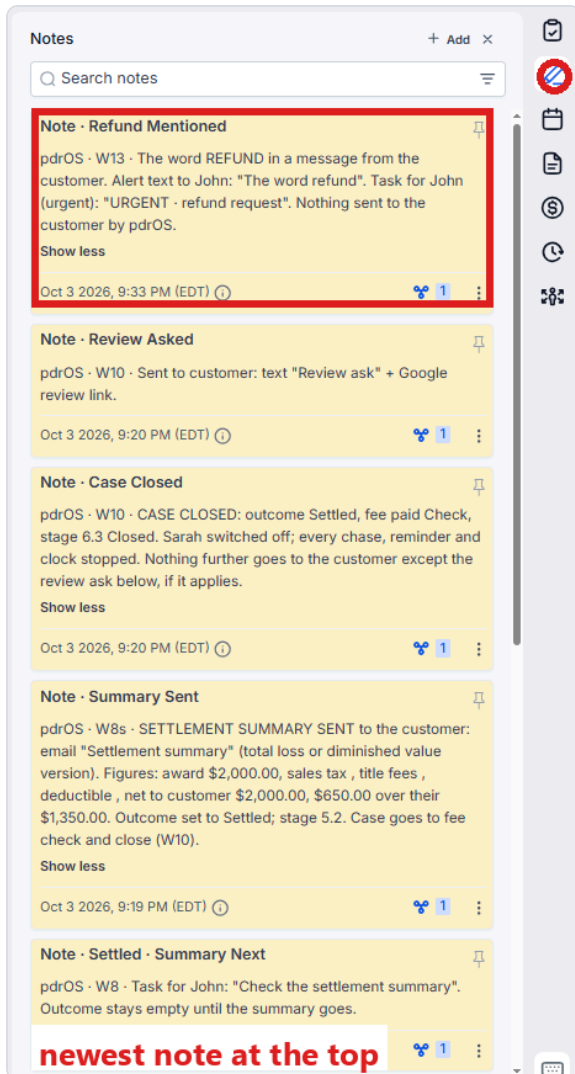
1. The **RO number** (your case number). It is on every task (CASE #1007) and every text to your phone (case #1007).
2. **What you did** (the field, the switch, the upload) and **when**.
3. **What you expected** to happen.
4. A screenshot of the **newest note** on the customer's contact profile (how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

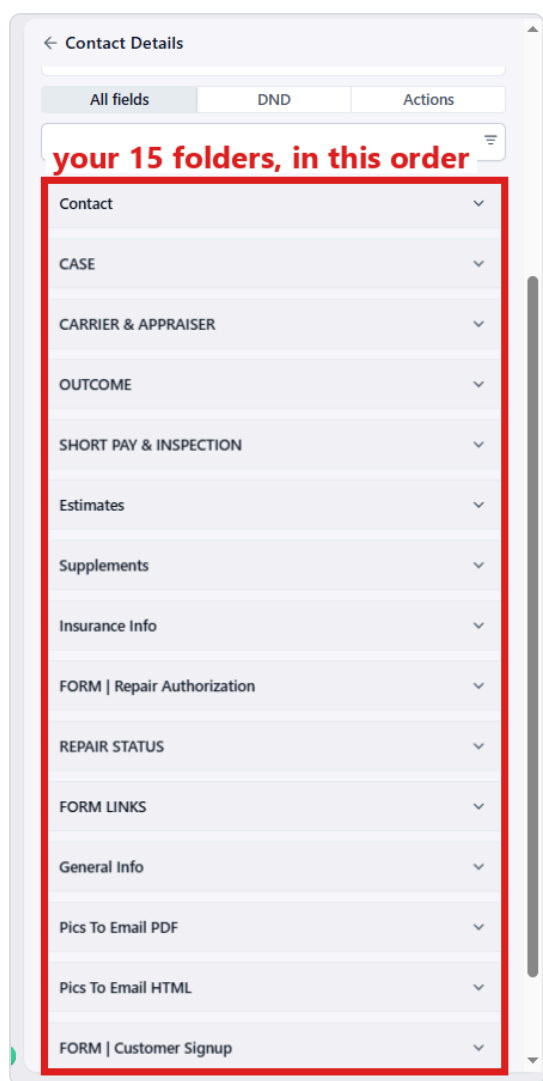
4. Click the green **Mark Complete** button at the bottom right of the full view. If the task is already gone when you come back, pdrOS closed it because the step happened.

Reference: every field, by folder

Answers: what does this field do? who fills it? which folder is it in, and how do I open that folder? what kind of box is it, and how do I change it?

Every field on the left side of a customer's contact profile, folder by folder, in the order you see them on screen. Your contact profile shows 15 folders. Your own four come right after **Contact: CASE, CARRIER & APPRAISER, OUTCOME** and **SHORT PAY & INSPECTION**. Above the folders, at the top of the left side, are the customer's name, then **Tags**, the RO number and **RO Type**, the three tabs (**All fields, DND, Actions**) and the **Search fields and folders** box.

✂ marks a field that starts work when you save it. "pdrOS fills this; leave it" means the system writes that field. Leave those alone unless this guide says otherwise.



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

How to open a folder and change a field

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 you need.
5. Click the folder's name to open it.
6. Find the field. Do the action for its type (the list below).
7. Click the blue **Save** button at the bottom of the left side.

Can't find a field? Type the field's name in the search box at the top of the left side (it reads **Search fields and folders**).

The action for each type in the tables:

- **A list:** click the box under the field and pick the choice from the list.
- **Claim side and Fee payer:** lists; click the box under the field and pick the choice.
- **A checkbox (Intake consent):** leave it; the signup form fills it.
- **A date:** click the box under the field and pick the day in the calendar that opens.
- **Money:** click in the box under the field and type the amount (numbers only, no dollar sign).
- **A number or text:** click in the box under the field and type it.
- **A file upload:** in the field, click **Click to upload**, pick the PDF on your computer and click **Open**. To look at a file already there, click its name in the field.
- **A PDF address or a link:** a text box holding a web address. It is not clickable. Open PDFs with the **Docs** button in RO Hub ([Documents](#)); copy a link with Ctrl and A, then Ctrl and C.

The blue **Save** button 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).

Contact (folder 1 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **Contact** and click the folder's name to open it.

Field	Type	Who fills it	What it does
RO# DO NOT EDIT THIS!!	text	pdrOS fills this; never change it	The RO number (your case number). Tasks show it as "CASE #1007", texts to you as "case #1007", customers see "file #1007": all the same number. Every text, email and task carries it.
Customer Vehicle / Customer Signup Form	text	the signup form	The vehicle: year, make, model.
Customer Signup Notes	text	the signup form	The note typed on the signup form, kept as written.

CASE (folder 2 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it.

Case status is the first field in this folder. Right after it come the five Send switches, in the order a case uses them: **Send range**, **Send demand**, **Send our report**, **Send counter** and **Send summary**. Each Send switch is a list. You pick **Send it now** or **I sent it myself**; pdrOS sets **Sent** or **Not sent (see task)**. Clock A, Clock B and the silence clock below are waiting periods; [Reference: every timer](#) lists each one.

Field	Type	Who fills it	What it does
Case status	text	pdrOS fills this; leave it	The stage sentence: what Sarah says if the customer asks. See Every stage .
Send range	a list: Send it now, I sent it myself, Sent, Not sent (see task)	you, then pdrOS	✂ The range text, link and email to the customer.
Send demand	a list: Send it now, I sent it myself, Sent, Not sent (see task)	you, then pdrOS	✂ The RTA or demand email to the adjuster; Clock A or the demand chase.
Send our report	a list: Send it now, I sent it myself, Sent, Not sent (see task)	you, then pdrOS	✂ Your report to the other appraiser; Clock B.
Send counter	a list: Send it now, I sent it myself, Sent, Not sent (see task)	you, then pdrOS	✂ The counter email; the 7-day silence clock.

Field	Type	Who fills it	What it does
Send summary	a list: Send it now, I sent it myself, Sent, Not sent (see task)	you, then pdrOS	✗ Works out the sales tax, the net and the gain over the first offer, emails the summary to the customer, then checks whether the fee is paid.
Appraiser	text	pdrOS fills this; leave it	Your name, written at signup.
Claim side	a list: Insured, Claimant	the signup form; pdrOS sets Claimant itself when you set Engaged against to Shop or Carrier	Which demand goes; the statute deadline on claimant cases.
Fee payer	a list: Owner, Shop	the signup form, or you	Owner: the invoice goes to the customer. Shop: no customer invoice, and you get an Invoice the shop task. Never tell the customer or the insurer that the shop pays.
Fee amount	money	pdrOS, or you before signing	Which invoice goes at signing. A fee that is not the standard one means you invoice by hand (you get a task).
Fee paid	a list: No, Square, Venmo, Check, Cash, Waived	you; pdrOS writes Square when the Square invoice is paid	✗ Closes the case once Outcome is set. On a won case, the customer then gets the Google review text.
Referring shop	text	the shop referral form or the signup form, or you	The body shop that sent the customer. On a short pay, the shop you work with.
Referring shop contact	text	the shop referral form or the signup form, or you	The person at that shop.
Referring shop email	text	the shop referral form or the signup form, or you	On a short pay, the shop's upload email and its reminders go here.
How they found us	a list: Shop, Past customer, Google, Other	the signup form	For your records only.
Agreement signed date	a date	pdrOS fills this; leave it	The day the customer signed. A record.
Range low	money	you	Used by Send range.
Range high	money	you	Used by Send range.
Carrier's offer	money	the signup form, or you	The insurer's first offer. Used by the range email and the summary.

Field	Type	Who fills it	What it does
Intake consent	a checkbox	the signup form	The customer's permission to text.
Agreement type	a list: total loss claim, diminished value, short pay, post-repair inspection	pdrOS fills this; leave it	Which agreement wording the customer signs.
Carrier valuation report	a file upload	the customer (upload link), or you	≤ The total loss document. When it lands, the case moves to 1.2 and you get Documents in - value it.
Repair invoice	a file upload	the customer (upload link), or you	≤ One of the diminished value documents (with the mileage and photos).
Shop estimate PDF	a file upload	the shop (upload link), or you	≤ One of the two short pay estimates. When both are in, Sharon gets Enter the shop's estimate in CCC1 and you get Finish the rewrite.
Carrier estimate PDF	a file upload	the shop (upload link), or you	≤ One of the two short pay estimates. When both are in, Sharon gets Enter the shop's estimate in CCC1 and you get Finish the rewrite.
Referring shop phone	text	you	The shop's phone number.
RTA or demand PDF	a file upload	you	Needed by Send demand; attached to the demand email.
Documents in date	a date	pdrOS fills this; leave it	The day the customer's documents were all in. A record.
Range sent date	a date	pdrOS fills this; leave it	The day the range went. A record.
Stage rank	a number	pdrOS fills this; leave it	Internal: where the case is.

CARRIER & APPRAISER (folder 3 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it.

Field	Type	Who fills it	What it does
Other appraiser name	text	you	Their appraiser. Printed in the report email; fill it before Send our report.
Other appraiser email	text	you	Needed by Send our report.
Other appraiser phone	text	you	Their appraiser's phone number.
Adjuster name	text	the signup form, or you	Printed in the demand email; fill it before Send demand.
Adjuster email	text	the signup form, or you	Needed by Send demand. It must be a valid email.
RTA or demand sent date	a date	pdrOS when the demand goes, or you	✂ pdrOS writes it when the demand goes. If you type it yourself (or pick I sent it myself), the clocks start: Clock A on an insured case, the demand chase on a claimant case. On an inspection taken on against a shop, it only moves the case to 3.1. Clear it to send a corrected demand.
Other appraiser contact date	a date	you	✂ Stops Clock A; texts the customer; gives you Their appraiser is in contact · send our report .
Report sent date	a date	pdrOS when your report goes	✂ Typed by hand: Clock B.
Their report received date	a date	pdrOS fills this; leave it	The day their report landed in Supplement #1 Upload Doc Here . A record.
My number	money	you	Your valuation. Needed by Send counter.
Their number	money	you	✂ Stops every chase and every "how did it end" message; texts you; gives you the task Negotiate . Needed by Send counter.
Counteroffer	money	you	Needed by Send counter.
Umpire	a list: No, Called, Decided	you	✂ Called : customer text and email, Umpire task. Decided : nothing.
Umpire fee received	a list (Received)	you	A record: pick Received when the customer has paid your invoice for their half of the umpire's fee.
Demand-by date	a date	you	✂ Alerts 14 and 3 days before.

Field	Type	Who fills it	What it does
Statute deadline	a date	pdrOS, or you	✂ Customer text; alerts 14 and 3 days before.
Chase count	a number	pdrOS fills this; leave it	How many chases went.
Tortfeasor letter sent date	a date	you	✂ Stage 4.4 Pre-court.
Appraisal Document Upload Link	a link	pdrOS fills this; leave it	This customer's own upload link. Files sent through it land on this contact profile. Never send it to another customer.
Negotiation note	text	you	One line of reasoning. Used by Send counter.
Counter sent date	a date	pdrOS when the counter goes	✂ Typed by hand: the silence clock.

OUTCOME (folder 4 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **OUTCOME** and click the folder's name to open it.

Field	Type	Who fills it	What it does
Award signed date	a date	you	✂ With Award amount : the customer gets the settled text and email, and you get Check the settlement summary (on a short pay or an inspection, Outcome becomes Settled instead).
Award amount	money	you	✂ Together with Award signed date : the same.
Title fees	money	you	Used by the total loss summary.
Recovery over offer	money	pdrOS fills this; leave it	Computed by the summary.
Settlement summary sent date	a date	pdrOS fills this; leave it	The day the summary went. A record.

Field	Type	Who fills it	What it does
Release signed date	a date	you	For your record only; nothing reads it.
Outcome	a list: Settled, Counteroffer pending, Carrier review report received, Customer took the carrier's number, Court, Went quiet, Withdrawn, Report only	pdrOS writes Settled and Report only ; you pick the others	✗ With Fee paid , closes the case. Counteroffer pending and Carrier review report received keep it open and ask the customer how it ended on days 30, 60, 90 and 120, then 210 and 300; Court keeps it open and waits for you. See The Outcome list and the Fee paid list .
Outcome recorded date	a date	pdrOS fills this; leave it	When it closed.
Sales tax %	a number	you (it starts at 6)	Used by the total loss summary.
Sales tax amount	money	pdrOS fills this; leave it	Computed by the summary.
Net to customer	money	pdrOS fills this; leave it	Computed by the summary.

SHORT PAY & INSPECTION (folder 5 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **SHORT PAY & INSPECTION** and click the folder's name to open it.

Field	Type	Who fills it	What it does
Shop estimate total	money	you or Sharon, optional (the short pay tasks print it)	The shop's estimate total.
Carrier estimate total	money	you or Sharon, optional (the short pay tasks print it)	The insurer's estimate total.
Rewritten estimate total	money	you (a record)	The total of the rewrite.
Variance	money	you or Sharon (a record)	The gap between the two totals.
Inspection location	a list: Our office, Travel	the signup form	Our office: the booking link. Travel: the travel fee and a call task.

Field	Type	Who fills it	What it does
Travel fee	money	pdrOS fills this; leave it	Added to the invoice (\$600 on a travel inspection).
Engaged against	a list: None , Shop , Carrier	you	✗ None : Report only and the close. Shop or Carrier : taking it on.

Estimates (folder 6 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **Estimates** and click the folder's name to open it.

Field	Type	Who fills it	What it does
Upload Estimate Doc Here	a file upload	you	✗ Your report or rewrite: your report on a total loss, a diminished value or an inspection; your rewrite on a short pay. It starts the next step for the type. A second upload replaces the file and only leaves a note.
Upload Insurance Approved Estimate PDF	a file upload	you, when the Negotiate task asks for it	The signed award. Nothing reads it; it is your record.
Other Special Instructions	text	pdrOS fills this; leave it	A copy of the signup notes. On a shop referral, what the shop wrote.

Supplements (folder 7 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **Supplements** and click the folder's name to open it.

Field	Type	Who fills it	What it does
Supplement #1 Upload Doc Here	a file upload	you	✗ Their report: stops every chase and gives you the Negotiate task. pdrOS writes Their report received date .

Insurance Info (folder 8 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **Insurance Info** and click the folder's name to open it.

Field	Type	Who fills it	What it does
Insurance Company	text	the signup form, or you	Printed in emails and stage sentences.
Deductible	money	you	Used by the total loss summary.
Claim #	text	the signup form, or you	The insurer's claim number. Needed by Send demand, Send our report and Send counter.

FORM | Repair Authorization (folder 9 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **FORM | Repair Authorization** and click the folder's name to open it.

Field	Type	Who fills it	What it does
Repair Authorization Form PDF	a PDF address (not clickable; open it with Docs in RO Hub: Repair Authorization Form)	pdrOS fills this; leave it	The signed agreement.
VIN	text	the customer, when they sign the agreement	The vehicle's VIN.
Date of Loss	a date	the signup form, or you	✂ Sets the statute deadline on a diminished value and on a claimant inspection. Needed by Send demand.

REPAIR STATUS (folder 10 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **REPAIR STATUS** and click the folder's name to open it.

Field	Type	Who fills it	What it does
RO Type	a list of twelve: hail, collision, theft, vandalism, animal, mechanical, windshield, circle and go not here, total loss claim, diminished value, short pay, post-repair inspection	the signup form (it calls it Repair Order Type); you change it only to fix a mistake	✂ The kind of case. It decides every step that follows; changing it switches the case to the new type's steps. Yours are the last four. See Wrong type, or the type changed later .

FORM LINKS (folder 11 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **FORM LINKS** and click the folder's name to open it.

Field	Type	Who fills it	What it does
REPAIR AUTHORIZATION LINK	a link	pdrOS fills this; leave it	This customer's own agreement link. A change of RO Type swaps it to the new wording. Never send one customer's link to another.

General Info (folder 12 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **General Info** and click the folder's name to open it.

This folder holds the customer's address. None of your case fields are in it, and nothing in it starts work. Leave it.

Pics To Email PDF (folder 13 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **Pics To Email PDF** and click the folder's name to open it.

Field	Type	Who fills it	What it does
Damage Images PDF	a PDF address (not clickable; open it with Docs in RO Hub: Scope Sheet Images (PDF))	pdrOS fills this; leave it	The photo report as a PDF. When pdrOS fills it, you get Write the inspection report on an inspection; on a diminished value it counts as documents.

Pics To Email HTML (folder 14 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **Pics To Email HTML** and click the folder's name to open it.

Field	Type	Who fills it	What it does
Damage Images HTML	a link	pdrOS fills this; leave it	The photo report as a web page, built from the customer's photos. When pdrOS fills it, you get Write the inspection report on an inspection; on a diminished value it counts as documents.

FORM | Customer Signup (folder 15 of 15)

To open it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **FORM | Customer Signup** and click the folder's name to open it.

Field	Type	Who fills it	What it does
Customer Signup Form PDF	a PDF address (not clickable; open it with Docs in RO Hub: Customer Signup Form)	pdrOS fills this; leave it	The signup sheet, made within a minute of the signup.

Tags: look, never touch

Tags are 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 (ask by Support ticket).

Two tags are ones we add for you when you ask through a support ticket (in the left menu, click **Support**, then the orange **Support Ticket** button; give the RO number and what you need). We do it on our side within the hour.

Tag	What it starts	When to ask for it
restart intake	the signup steps again	after we fix a signup that did not finish, after you correct a shop type to an appraisal type, or after you fix a wrong phone number (Wrong type or type changed)
chase documents	the documents or booking reminders again, from day 2	after the customer promised to upload and you want the reminders back on (Documents)

Reference: every stage

Answers: what are the stages? what moves a case to each one? what is the sentence at each stage? where do I see a case's stage?

The stage is where a case is. It moves when the customer signs up, uploads, signs or books; when you upload a file, type a number or a date, or pick a Send switch; or when a clock runs out. Each stage has one sentence. pdrOS writes it into **Case status** (folder **CASE** on the customer's contact profile), and Sarah reads it to a customer who asks.

Where to see the stage

Every case at once: In the left menu, click **Repair Stages**. 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. You are in the right place when you see columns of cards headed 1.1 to 6.3.



Picture: Repair Stages: the pipeline APPRAISAL CASES picked at the top left (circled), the cards in their stage columns 1.1 to 6.3.

One case:

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. 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, scroll down to the folder **CASE** and click the folder's name to open it.
5. Read **Case status**: its sentence matches a stage in the table below.

The stages

Stage	Name	Reached when	Sentence to the customer
1.1	New case	Signup; also after a cancelled or missed inspection	Case opened. We have sent you what we need from you to get started.
1.2	Documents in	The customer's documents are in (on a short pay, both estimates)	We have your documents and are working on the valuation.
1.3	Report written	Your report or rewrite is uploaded to Upload Estimate Doc Here (folder Estimates)	Our report is written. John Hayduk is finalizing the range to send you. (short pay: Our rewrite is done; the agreement is on its way to you to sign.)
1.4	Range sent	Send range (folder CASE)	We sent you our valuation and the agreement link. We are waiting for you to sign.
1.5	Hired	The agreement is signed	Agreement signed. We are preparing the demand to [insurer].
2.1	Inspection booked	A booking lands	Your inspection is booked for [date time] at our office.
2.2	Inspection report sent	The inspection report is uploaded to Upload Estimate Doc Here (folder Estimates)	Your inspection report was emailed to you. We are waiting to hear whether you want the report only or want us to take it on.
3.1	RTA or demand sent	Send demand (folder CASE)	Insured: The demand for appraisal went to [insurer] on [date]. Their appraiser has seven to ten business days to contact us (day 10 on the calendar). Claimant: Our demand went to [insurer] on [date]. We follow up if they go quiet.
3.2	Other appraiser in contact	Other appraiser contact date (folder CARRIER & APPRAISER)	The insurer's appraiser is in contact. The two appraisers are exchanging reports.
3.3	Report out	Send our report (folder CASE)	Our report went to their appraiser on [date]. We are waiting on theirs and follow up at day ten.
4.1	Their report or offer in	Their number (folder CARRIER & APPRAISER) or their report in Supplement #1 Upload Doc Here (folder Supplements)	The other side has answered with their figure. We are reviewing it.
4.2	Negotiating	Send counter (folder CASE)	We are negotiating. Our latest counter went out on [date].

Stage	Name	Reached when	Sentence to the customer
4.3	Umpire	Umpire = Called (folder CARRIER & APPRAISER)	The case is with the umpire. We are waiting on the decision.
4.4	Pre-court	Tortfeasor letter sent date (folder CARRIER & APPRAISER)	We are preparing for court.
5.1	Award signed or settled	Award amount + Award signed date (folder OUTCOME)	Settled. [Insurer] will contact you for the paperwork and pays you directly. Your settlement summary is on its way.
5.2	Summary sent	Send summary (folder CASE)	Settled. Your settlement summary was emailed to you.
6.1	Fee due	Any Outcome on a hired case while Fee paid (folder CASE) is still No	Settled. Our invoice is still open; it is in your email.
6.2	Outcome pending	Outcome (folder OUTCOME) Court, Counteroffer pending or Carrier review report received	We are waiting to hear how the claim ended. Tell us any time.
6.3	Closed	Outcome set and Fee paid not No (a case the customer never signed closes on any Outcome)	Closed. Thank you.

Stages 4.1 and 4.2 swap back and forth round after round; nothing else moves backwards except the inspection reset to 1.1.

Reference: every task

Answers: which tasks are there? who gets each one, and when? what do I do, and where do I click? how do I finish a task?

Title, who gets it, when, and the action with where to click. The task itself carries the facts and the steps.

Reading and finishing a task

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** to read the whole task.
4. Click the link under **WHERE** (it follows the words "Open the case"). The customer's contact profile opens in a new browser tab.
5. Do the step on the contact profile.
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. Only three tasks close themselves today:  Demand not sent,  Our report not sent and  Counteroffer not sent (they close when the email finally goes). Every other task stays until you click **Mark Complete**. When a task says "Tick this task", click **Mark Complete**.

The tasks

Arrows mean: click this, then this. **Contacts** → the customer is short for these steps. In the left menu, click **Contacts**. Type the customer's last name or RO number (your case number) in the search box at the top of the list. Click their name. "Blue **Save** button" means the blue **Save** button at the bottom of the left side; nothing is saved or sent until you click it.

Task	Who	When	Action
Call the referred customer · NAME (from SHOP)	John	A shop referral lands	Call them. Then Tasks → the task → Open Full View → the signup link in the task; fill the signup with them (never a plain link).
Call to book the inspection · NAME	John	Travel inspection at signup; or day 5 of the booking reminders	Call. Then book: Contacts → the customer → right edge Appointments → + Add → Meetings → under Calendar pick Inspections Calendar → under Date pick the day, under Slot a free time → Book appointment .

Task	Who	When	Action
Chase documents · NAME	John	Day 5 of the documents reminders (also the shop chase)	Call the customer or shop.
Nothing after three weeks · close it? · NAME	John	Day 19	Call; or close it: Contacts → the customer → folder OUTCOME → Outcome → Went quiet → blue Save button.
Documents in · value it · NAME	John	Documents complete (total loss, diminished value)	Write the valuation in RTAflow. Upload it: Contacts → the customer → folder Estimates → Upload Estimate Doc Here → Click to upload → pick the PDF → Open → blue Save button.
Enter the shop's estimate in CCC1 · NAME	Sharon	Both estimates in (short pay)	Enter it in CCC1. The files are linked in the task: Tasks → the task → Open Full View .
Finish the rewrite · NAME	John	Both estimates in (short pay)	Write the rewrite. Upload it: Contacts → the customer → folder Estimates → Upload Estimate Doc Here → Click to upload → pick the PDF → Open → blue Save button.
Set the range · NAME	John	Your report uploaded	Contacts → the customer → folder CARRIER & APPRAISER → My number : type it → blue Save button. Folder CASE → Range low, Range high : type them → blue Save button. Then Send range → Send it now → blue Save button.
Range not answered · call NAME	John	Day 7 after the range	Call.
A Send switch could not act · NAME	John	You set a switch on the wrong case type, or a number it needs is empty	Read why: Tasks → the task → Open Full View . Fix the field it names (Every field shows its folder) → blue Save button. Wait one minute. Folder CASE → the switch → Send it now → blue Save button.
A Send switch did not go · NAME	John	A switch stuck on Send it now for 5 minutes	Contacts → the customer → folder CASE → the switch → Not sent (see task) → blue Save button. Wait one minute. Then the switch → Send it now → blue Save button.
Send the demand · NAME	John	Signed (total loss, diminished value, short pay)	Make the RTA or demand in RTAflow. Contacts → the customer → folder CASE → RTA or demand PDF → Click to upload → pick the PDF → Open → blue Save button. Check folder Insurance Info → Claim # , folder FORM Repair Authorization → Date of Loss , and folder CARRIER & APPRAISER → Adjuster name and Adjuster email . Folder CASE → Send demand → Send it now → blue Save button.

Task	Who	When	Action
Send a custom invoice · NAME	John	Signed with a non-standard fee	Invoice by hand: Invoices → + New → New Invoice → Select Customer → + Add Product: Appraisal fee → type the amount → Send . Step by step: Invoices and payments .
Invoice the shop · NAME	John	Signed with Fee payer Shop	Invoice the shop by hand: Invoices → + New → New Invoice → Select Customer : the shop → + Add Product: Appraisal fee → type the amount → Send . Step by step: Invoices and payments .
⚠ Demand not sent · NAME	John	Send demand refused	Read the missing item: Tasks → the task → Open Full View . Fix it on the contact profile (Every field shows its folder) → blue Save button. Wait one minute. Folder CASE → Send demand → Send it now → blue Save button. Closes itself when the email goes.
No contact in 7 business days · call the carrier · NAME	John	Day 10 after the RTA (about seven business days)	Call the carrier.
Still no contact after 17 days · NAME	John	Day 17	Escalate with the carrier.
Their appraiser is in contact · send our report · NAME	John	Contact date typed	Contacts → the customer → folder CASE → Send our report → Send it now → blue Save button.
⚠ Our report not sent · NAME	John	Send our report refused	Fix the item the task names (for example folder CARRIER & APPRAISER → Other appraiser email , or your report in folder Estimates → Upload Estimate Doc Here) → blue Save button. Wait one minute. Folder CASE → Send our report → Send it now → blue Save button. Closes itself when the email goes.
⚠ Demand sent, record it by hand · NAME (also Our report, Counteroffer)	John	Rare: the email went but the case could not be updated	Contacts → the customer → folder CARRIER & APPRAISER → the sent date the task names (pick today) → folder CASE → the switch → Sent → blue Save button. Then Mark Complete .
Day 22 · no report from their appraiser · NAME	John	Day 22 after your report	Call them or the umpire.

Task	Who	When	Action
Three chases, no answer · NAME	John	Third demand chase unanswered (claimant)	Call the adjuster's supervisor.
Negotiate · NAME	John	Their number or report in	Contacts → the customer → folder CARRIER & APPRAISER → Counteroffer : type your figure; Negotiation note : type one line → blue Save button. Folder CASE → Send counter → Send it now → blue Save button.
△ Counteroffer not sent · NAME	John	Send counter refused	Read what is missing: Tasks → the task → Open Full View . Fix it (Counteroffer , Their number , My number : folder CARRIER & APPRAISER ; Claim # : folder Insurance Info) → blue Save button. Wait one minute. Folder CASE → Send counter → Send it now → blue Save button. Closes itself when the email goes.
No answer to your counter in 7 days · NAME	John	7 days after a counter	Call; or Contacts → the customer → folder CARRIER & APPRAISER → Umpire → Called → blue Save button.
Umpire · NAME	John	Umpire = Called	The three steps in the task. The last one: Contacts → the customer → folder CARRIER & APPRAISER → Umpire fee received → Received → blue Save button.
Check the settlement summary · NAME	John	Award in (total loss, diminished value)	Check the five numbers: Contacts → the customer → folder Insurance Info → Deductible ; folder CASE → Carrier's offer ; folder OUTCOME → Award amount , Title fees , Sales tax % . Fix any → blue Save button. Then folder CASE → Send summary → Send it now → blue Save button.
Fee not paid · NAME	John	Any Outcome on a hired case while Fee paid is No	When paid: Contacts → the customer → folder CASE → Fee paid → Square , Venmo , Check , Cash or Waived → blue Save button.
Write the inspection report · NAME	John	Inspection photos in	Write it. Upload it: Contacts → the customer → folder Estimates → Upload Estimate Doc Here → Click to upload → pick the PDF → Open → blue Save button.
Record their decision · NAME	John	Inspection report sent	When they answer: Contacts → the customer → folder SHORT PAY & INSPECTION → Engaged against → None , Shop or Carrier → blue Save button.
Send the demand · inspection · NAME	John	Engaged against Shop or Carrier	Shop: send your letter, then Contacts → the customer → folder CASE → Send demand → I sent it myself → blue Save button (or folder CARRIER & APPRAISER → RTA or demand sent date → pick the day → blue Save button). Carrier: as Send the demand above.

Task	Who	When	Action
Demand-by date in 14 days · NAME	John	14 days before your date	Send the demand before the date (as Send the demand above).
Statute deadline in 14 days · NAME	John	14 days before the statute	Decide: file, or close.
No answer for a year · close it? · NAME	John	A year of outcome asks	Call; then Contacts → the customer → folder OUTCOME → Outcome → the choice that fits → blue Save button.
URGENT · refund request · NAME	John	"refund" in a customer message	Call now.
Customer has a money question · NAME	Sharon	Sarah routed a money question	The fee: answer from the task (Tasks → the task → Open Full View). A figure about the claim: John answers.
Customer wants a date or an update · NAME	Sharon	Sarah routed "when"	Read the next step: Contacts → the customer → folder CASE → Case status . Give that; never a settlement date.
Customer gave new contact or case details · NAME	Sharon	New details in the thread	Within the hour: Contacts → the customer → folder Contact (phone, email) or folder General Info (address) → click in the box, delete the old value, type the new one → blue Save button. Claim details: folder Insurance Info → Claim # or Insurance Company . Adjuster or other appraiser: folder CARRIER & APPRAISER .
Customer asked for a document · NAME	Sharon	They want a copy of the agreement, the report or the summary	The agreement: RO Hub → the case (type the RO number in the box under RO # :, click Search) → Docs → Repair Authorization Form (it opens in a new tab; save it with the browser's download arrow). The report: Contacts → the customer → folder Estimates → click the file's name in Upload Estimate Doc Here . Save it to your computer, then email it from the message box at the bottom of the middle (paperclip icon). The summary is an email, not a file: find it in the middle (its date is in folder OUTCOME → Settlement summary sent date), open it and forward it. See Documents .
URGENT · unhappy customer · call within the hour · NAME	Sharon	Sarah read a complaint	Read first: Contacts → the customer → the middle, and right edge Notes . Ask us to switch Sarah off for them (Support → Support Ticket , with the customer's name). Call within the hour, by phone. Click Mark Complete only when the customer says they are satisfied, then ask us the same way to switch Sarah back on.

Task	Who	When	Action
Sarah needs a person · NAME	Sharon	Most often to move or cancel an inspection	Read the whole conversation first: Contacts → the customer → the middle. Then act there. To cancel: right edge Appointments → the three dots on the appointment → Cancel . To move: the three dots → Edit → Date and Slot → Save .
Sarah handover · NAME	Sharon	Sarah stepped back for 8 hours (offer, release, umpire, court, deadline, or they asked for a person)	Read the conversation: Contacts → the customer → the middle. One of you replies from the message box at the bottom of the middle.
User query	John	A one-line task made at a handover, with what the customer asked	Answer the customer: Contacts → the customer → the message box at the bottom of the middle → type → the paper-plane button.

Reference: every text and email the customer receives

Answers: what did pdrOS send my customer and when? what does each text and email say? where do I read what one customer got?

Every message pdrOS sends a customer, when it goes, and what it says in one line. All texts come from the 610 number signed as Sarah or the office; every email pdrOS sends for you comes from John's address with his signature; Sarah's own email replies are signed Sarah Miller. Reminders go between 8 am and 8 pm only.

In these messages, "file #N" is the RO number (your case number). Customers see it as "file #1007"; your tasks show it as "CASE #1007": the same number.

Where to read what one customer got

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 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. Every text and email they got is in the middle, oldest at the top, newest at the bottom.

Signup

Message	When	Says
Welcome text	At signup	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 I'll answer or get John Hayduk to you. Reply STOP to opt out.
Email "Your case with Collision Safety Consultants of PA: file #N"	At signup	The case is open, the RO number, the appraiser, and that a second message says what is needed.
Documents text, total loss	At signup	We need the insurer's valuation report; ask your adjuster for the "total loss valuation"; upload it with the link in my next text.
Email "One document to start: the insurer's valuation report"	At signup, total loss	The same, with what the report is and where to get it.

Message	When	Says
Documents text, diminished value	At signup	We need the final repair invoice, the mileage and your photos of the damage and of the finished repair; photos go straight from your phone. Reply with the mileage; the upload link is in my next text.
Email "To start your diminished value claim: invoice, mileage, photos"	At signup, diminished value	The three things, numbered.
The upload link	After the documents text	The link alone.
Short pay owner text	At signup	On your short pay we work with [shop] on the paperwork and [insurer] on the numbers. Nothing to send now.
Booking text + the booking link	At signup, office inspection	Let's book your inspection; main lobby of 101 Woodbine Rd; or reply TRAVEL.
Email "Book your post-repair inspection"	At signup, office inspection	The booking link and the address.
Travel text	At signup, travel inspection	You asked us to come to you: John Hayduk will call you to agree a day, a time and the address.
Statute text	Minutes after signup, diminished value and claimant inspections	If this claim ever has to go to court, the deadline to file is [date]. We keep track of it for you.

Reminders

Message	When	Says
Documents reminder text + link	Day 2 and day 12 without documents	We still need [the item] to start on your [type].
Email "Still waiting on one thing to start your case"	Day 2 and day 12	The same.
Booking reminder text + link	Day 2 and day 12 without a booking	Your inspection isn't booked yet. Pick any time with the link, or reply TRAVEL.
Range reminder text + agreement link	Day 3 after the range	Any questions about the valuation? The agreement link is in my next text.

Range, agreement, invoice

Message	When	Says
Range text + agreement link	Send range	John Hayduk has emailed you the valuation and our agreement. To go ahead, sign with the link in my next text.
Email "Your [vehicle]: what I think we can get" (total loss) / "Your diminished value claim: what I think the car lost"	Send range	The range in dollars over the offer, and what signing starts.
Short pay sign text + link, email "Your short pay with [insurer]: one signature to start"	The rewrite is uploaded	Our rewrite is done; to let us take it up with [insurer], please sign.
Invoice text and email	Signing (standard fee)	Collision Safety Consultants of PA sent you invoice INV-N for \$600.00 due [date]. Invoice link.

The case moving

Message	When	Says
Demand sent text (insured)	Send demand	The demand for appraisal went to [insurer] today. Their appraiser should contact John Hayduk within 7 to 10 business days.
Demand sent text (claimant)	Send demand	Your demand went to [insurer] today. They often take a few weeks; we follow up if they go quiet.
In contact text	Other appraiser contact date	[Insurer]'s appraiser is now in contact with John Hayduk. Next the two appraisers exchange reports.
Umpire text + email "Your claim is going to an umpire"	Umpire = Called	A neutral umpire decides; the fee is shared equally, John sends an invoice for your half and releases his valuation once it is paid
Taking it on text	Engaged against Shop or Carrier	We'll take it on from here: John Hayduk is preparing the demand.

Inspections

Message	When	Says
Confirmation text + email "Your inspection is booked"	A booking	Booked for [date time]; meet us in the main lobby of 101 Woodbine Rd unless we agreed to come to you.

Message	When	Says
Sign text + agreement link	Booking and day before, if unsigned	One thing before we meet: please read and sign the inspection agreement.
Day-before text	The day before	Your inspection is tomorrow, [date time], in the main lobby... Bring the car and any repair paperwork.
Cancelled or missed text + booking link	Cancel or no show	Your inspection did not go ahead. Pick a new time with the link, or reply TRAVEL.
Email "Your post-repair inspection report · [vehicle]" + text	The report is uploaded	Your report and the photos; tell me: report only, or take it on?

Settlement and close

Message	When	Says
Settled text + email "Your claim is settled"	Award in	Your claim is settled; [insurer] pays you directly; John is sending the summary.
Email "Your settlement on the [vehicle]: the numbers" / "Your diminished value settlement: the numbers"	Send summary	Award, sales tax, title fees, deductible, net to you, and the gain over the first offer.
Review text + the Google link	Close, won	Thank you for trusting us; a short Google review helps the next person.
How did it end text + email "How did it end?"	Days 30, 60, 90 and 120, then 210 and 300, on a pending outcome or after the third demand chase	How did your claim end up?

From Sarah

Message	When	Says
Her answers	A customer with an open case texts or emails	Where the case stands, what is needed, how it works
Missed call text	A customer with an open case calls the 610 and does not get through	Sorry we missed your call. Text me here and I'll answer, or get John Hayduk to call you back.
Who-are-you text	A number with no case texts the 610 (once)	Asks who they are

Reference: every timer

Answers: how many days until the next reminder, chase, alert or task? what stops each one, and where do I type it?

Every day count and waiting period in pdrOS, in one place. Days are calendar days unless it says business days.

Reminders to the customer or shop

Chase	Day 2	Day 5	Day 12	Day 19
Documents (total loss, diminished value)	reminder text + link + email	task Chase documents	reminder again	task Nothing after three weeks · close it? ; reminders stop
Shop estimates (short pay)	reminder email to the shop	task Chase documents	reminder again	task Nothing after three weeks · close it?
Booking (office inspection)	reminder text + booking link	task Call to book the inspection	reminder again	task Nothing after three weeks · close it?

All three stop the moment the documents, the estimates or the booking arrive. To run one again, tell us: in the left menu, click **Support**, then the orange **Support Ticket** button. Give the RO number (your case number) and write "please restart the document reminders" (or "the booking reminders"). We do it on our side within the hour.

A shop referral

After the referral form	What
Day 3, no signup yet	text to John: "NAME, referred by SHOP 3 days ago, has not started the signup. Give them a call"; nothing to the customer

Signature

After the range	What
Day 3	reminder text + agreement link
Day 7	task Range not answered · call NAME

The other side

Clock	Starts	Day 10	Day 17	Day 22 / 24
Clock A (insured, after the RTA)	Send demand	day 10 (about seven business days): text + task No contact in 7 business days · call the carrier	task Still no contact after 17 days	
Clock B (after your report)	Send our report	chase email 1 with your report	chase email 2	day 22: text + task Day 22 · no report from their appraiser
Demand chase (claimant)	Send demand	chase 1 with the demand and report	chase 2	day 24: chase 3, then text + task Three chases, no answer , and the customer is asked

Silence clock (starts with Send counter): on day 7 with no answer, a text and the task **No answer to your counter in 7 days**.

Typing **Other appraiser contact date** stops Clock A. Typing **Their number**, or uploading their report, stops all of them. Arrows mean: click this, then this. **Contacts** → the customer is short for: in the left menu, click **Contacts**, type the customer's last name or RO number in the search box at the top of the list, and click their name.

- **Clock A: Contacts** → the customer → folder **CARRIER & APPRAISER** → **Other appraiser contact date** → pick the day → the blue **Save** button at the bottom of the left side.
- **All of them: Contacts** → the customer → folder **CARRIER & APPRAISER** → **Their number** → type the amount → the blue **Save** button at the bottom of the left side. Or upload their report: folder **Supplements** → **Supplement #1 Upload Doc Here** → **Click to upload** → pick the PDF → **Open** → the blue **Save** button at the bottom of the left side.

Inspections

When	What
The day before the visit	reminder text (+ sign request if unsigned)
One hour before, unsigned	text to John with the signing link

Deadlines

Date	14 days before	3 days before
Demand-by date (folder CARRIER & APPRAISER)	text + task	text
Statute deadline (folder CARRIER & APPRAISER)	text + task	text

Fee

After settlement with Fee paid at No	What
At once	stage 6.1, task Fee not paid
Day 14	text to John
Day 28	note; the task stays

The task stays until you set **Fee paid: Contacts** → the customer → folder **CASE** → **Fee paid** → how it was paid → the blue **Save** button at the bottom of the left side.

Outcome asks (Court, Counteroffer pending, Carrier review report received)

A text and an email on days 30, 60, 90 and 120, then days 210 and 300 after the outcome (or after the third demand chase). After the day-300 ask comes the task **No answer for a year · close it?**

Short waits you will notice

Wait	Why
About 1 to 2 minutes after any upload, number or switch	pdrOS reads the contact profile after you click the blue Save button and acts; the note appears then (right edge Notes)
1 minute after a file is uploaded	pdrOS waits for the file to land before it checks whether the documents are complete
2 minutes after a signup with a date of loss	the statute deadline is set, then the customer gets the deadline text
1 minute between a Not sent and your next Send it now	so pdrOS does not miss your second try
5 minutes	a switch still reading Send it now raises the "did not go" text
10 minutes	the same demand, report or counter is not sent twice inside this window
10 minutes	a signup that never gets its RO number raises the text "the intake for NAME did not finish"

Wait	Why
8 hours	Sarah sleeps on a customer after a handover
8 am to 8 pm	the only hours customer reminders and outcome asks go

Reference: the Outcome list and the Fee paid list

Answers: what are the Outcome choices? what are the Fee paid choices? what does each one do? where do I set them?

Two lists on the customer's contact profile decide how a case ends. **Outcome** (folder **OUTCOME**) says how; **Fee paid** (folder **CASE**) says whether the money is in. A hired case closes when **Outcome** has a final value and **Fee paid** is not **No**; a case the customer never signed closes on any final Outcome.

Where to set them

Arrows mean: click this, then this. **Contacts** → the customer is short for these steps. In the left menu, click **Contacts**. Type the customer's last name or RO number (your case number) in the search box at the top of the list. Click their name. Then, on the left side of the contact profile, scroll down to the folder and click its name to open it. Click the box under the field, pick the choice, and click the blue **Save** button at the bottom of the left side.

- **Outcome: Contacts** → the customer → folder **OUTCOME** → **Outcome** → the choice → the blue **Save** button.
- **Fee paid: Contacts** → the customer → folder **CASE** → **Fee paid** → the choice → the blue **Save** button.
- **Engaged against: Contacts** → the customer → folder **SHORT PAY & INSPECTION** → **Engaged against** → the choice → the blue **Save** button.
- **Umpire: Contacts** → the customer → folder **CARRIER & APPRAISER** → **Umpire** → the choice → the blue **Save** button.

Outcome

Value	Set by	Effect
Settled	pdrOS (summary sent; or award on short pay and inspection)	Waits for Fee paid , then closes as won; the customer gets the Google review text
Report only	pdrOS (Engaged against None)	Waits for Fee paid , then closes as won; the customer gets the Google review text
Withdrawn	you	Closes as lost (a hired case with Fee paid at No first waits at 6.1 Fee due until you set Fee paid)
Customer took the carrier's number	you	Closes as lost (same wait at 6.1 if the fee is unpaid on a hired case)
Went quiet	you	Closes as abandoned (same wait at 6.1 if the fee is unpaid on a hired case)

Value	Set by	Effect
Court	you	Stays open at 6.2; no asks, waits for you
Counteroffer pending	you	Stays open at 6.2; the same asks
Carrier review report received	you	Stays open at 6.2; the same asks

A closed case does not re-open by changing Outcome.

Fee paid

Value	Set by	Effect
No	pdrOS at signup	A hired case cannot close. After any Outcome it waits at 6.1 Fee due with the task Fee not paid (see Invoices and payments)
Square	pdrOS when the Square invoice is paid; or you	Closes the case once there is an Outcome
Venmo	you	Same
Check	you	Same
Cash	you	Same
Waived	you	Same; nothing to collect

How a closed case shows on the case board

The case board is in the left menu: click **Repair Stages**, then pick the pipeline **APPRAISAL CASES** at the top left. On the case board, a settled or report-only case shows as won. A withdrawn case, or one where the customer took the carrier's number, shows as lost. A case that went quiet shows as abandoned. The Google review text goes only to settled and report-only customers.

Engaged against (inspections only)

Value	Effect
None	Outcome becomes Report only ; closes once the fee is paid
Shop	You take it on and send your own letter to the shop; no chase
Carrier	You take it on; the demand goes to the insurer with your report and is chased like a diminished value

Umpire

The list also shows **No**: leave it there until you call the umpire.

Value	Effect
Called	Customer told; Umpire task; stage 4.3
Decided	Nothing by itself; the award settles

The habits: ten rules that keep every case clean

Answers: what are the rules that keep a case clean? where do I click for each one? when do I click Mark Complete? how do I give a task to someone else? what do I look at on Monday morning?

These came out of building and testing your cases. Each one prevents a real problem we saw. Where a habit needs a click, it says where.

1. Send the range from pdrOS only

Never also send RTAflow's range and payment links. Otherwise the customer gets two sets of payment links and two invoices.

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. Check that **Range low**, **Range high** and **Carrier's offer** are filled.
6. Look at the top of the folder. **Send range** comes right after **Case status**, the first field.
7. Click the box under **Send range** and pick **Send it now**.
8. Click the blue **Save** button at the bottom of the left side.

2. A total loss is Insured

Claim side must be **Insured** on every total loss and **Claimant** on every diminished value. The demand that goes out depends on it. (On an inspection you take on, pdrOS sets **Claimant** itself.)

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. Find **Claim side**.
6. Click the box under **Claim side** and pick **Insured** (a total loss) or **Claimant** (a diminished value).
7. Click the blue **Save** button at the bottom of the left side.

3. Customers text the 610 number

Give it on every call. Texts to your cell are not on the customer's contact profile, and Sarah cannot see them.

4. Ask consent on the call

You fill the signup form with the customer on the phone.

1. Open your signup link (your **Signup** bookmark; see [Your three links](#)).
2. Fill the form with the customer as you talk.
3. Near the end, find the consent box **I agree to receive text messages about my case from this office. Reply STOP to opt out.**
4. Ask "OK to text you updates?".
5. Yes: check the box. It records their permission on the case and on the signup PDF.
6. No: leave the box empty.
7. Click **Submit**.
8. 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 the customer's last name. 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.
9. Then tell us the RO number (in the left menu, click **Support**, then the orange **Support Ticket** button); we keep that customer on email only.

5. Use the link in the task or the alert, never a plain signup link

This is for a referred customer or a stranger who texted. The plain link makes a second contact profile for the same person.

From a task:

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 (for example **Call the referred customer**). A short preview opens under it.
3. Click **Open Full View**.
4. Click the signup link written in the task. (The link under **WHERE** is a different one: it opens the contact profile.)

From an alert on your phone: tap the signup link in the text.

6. Book from the contact profile, never type a name into Calendars

The **Appointments** icon on the contact profile books onto the right customer. Typing a name in **Calendars** makes a second customer with no case.

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 **Appointments** icon (a calendar). You are in the right place when the panel's title reads **Appointments**.
5. Click **+ Add** at the top of the panel. A small menu opens; click **Meetings**. The **Book appointment** window opens.
6. Under **Calendar**, make sure it reads **Inspections Calendar** (if not, click the box and pick it).
7. Under **Date & time**, click the box under **Date** and pick the day, then the box under **Slot** and pick a free time.
8. Click the blue **Book appointment** button at the bottom right.

7. After a "Not sent", fix the field, wait one minute, then send again

If you pick **Send it now** again within seconds of a **Not sent**, pdrOS can miss it. You would get the "did not go" text after five minutes and lose those five minutes.

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 row of the task that came with the **Not sent** (a **△** task, or **A Send switch could not act**). A short preview opens under it.
3. Click **Open Full View**. Read which field is missing.
4. Click the link under **WHERE**. 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.
5. On the left side, click in the search box at the top (it reads **Search fields and folders**) and type the missing field's name.
6. Fill the field. An amount or an email: click in the box and type it. A PDF: click **Click to upload**, pick the PDF and click **Open**.
7. Click the blue **Save** button at the bottom of the left side.
8. Wait one minute.
9. Click in the search box at the top of the left side and delete what is there.
10. Type the switch's name (for example **Send demand**).

11. Click the box under the switch and pick **Send it now**.
12. Click the blue **Save** button at the bottom of the left side.

8. Read the other side's conversation after a send

The email that went is kept there, and their reply lands there too. Your phone tells you when it does.

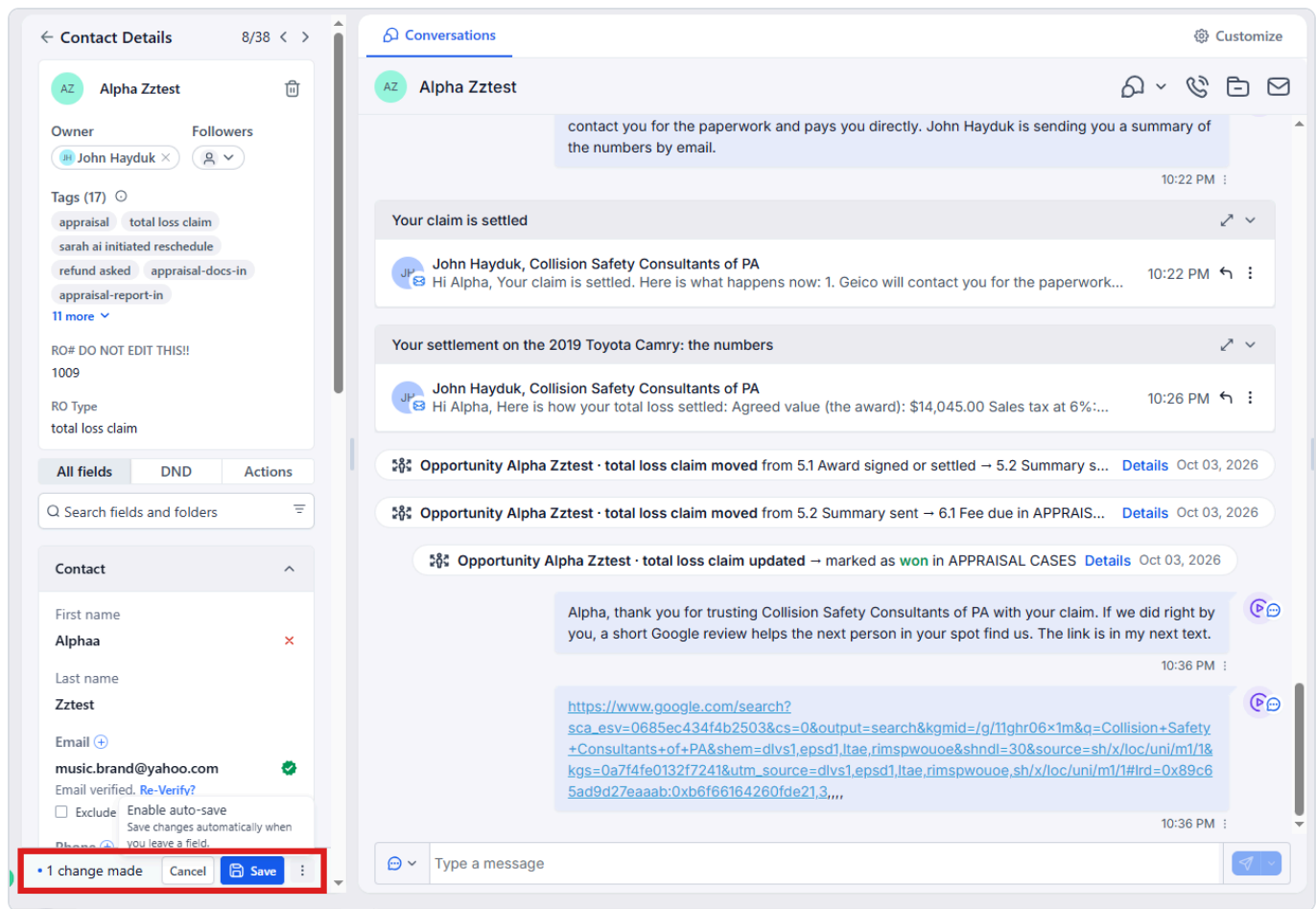
1. In the left menu, click **Conversations**.
2. On the left is the list of people. Find the adjuster's or the other appraiser's name and click it. If you cannot see it, type their name in the search box above the list. Their thread opens in the middle.
3. You are in the right place when you see their name and the email pdrOS just sent.
4. Read the email that went.

9. Put the real thing in the real field, only when it is true

A field is not a scratch pad; each one does work. Save after every change, then read the top 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 left side of the contact profile, scroll down to the folder that holds the field and click the folder's name to open it.
5. Find the field and do the action for its type (see [Reference: every field, by folder](#)).
6. 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.
7. 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.
8. Read the top note. It says what pdrOS did with your change.

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

10. If a step does not fit how you work, tell us

Do not force it or work around it. Tell us: in the left menu, click **Support**, then the orange **Support Ticket** button. We change the step for every case after; a workaround on your side sends the wrong message to the wrong person.

Three more, for you and Sharon

Mark Complete, always

John and Sharon both: do the step, come back to the Tasks page, click **Mark 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**.

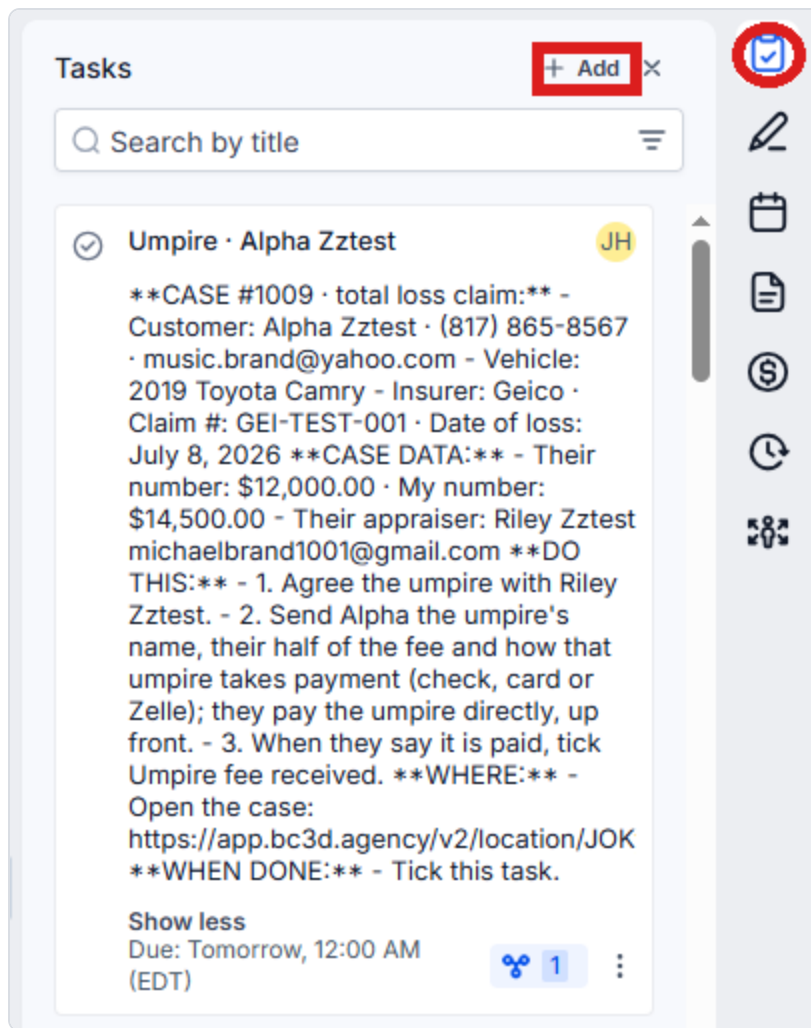
4. Click the green **Mark Complete** button at the bottom right of the full view.
5. Click **Close** to go back to the list.

If the task is already gone when you come back, pdrOS closed it because the step happened. Only three tasks close themselves today:  **Demand not sent**,  **Our report not sent** and  **Counteroffer not sent** (they close when the email finally goes). When a task says "Tick this task", it means click **Mark Complete**.

Sharon's tasks are Sharon's

The CCC1 entry and the customer follow-ups Sarah creates are addressed to her. To give one to someone else:

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 the box under **Assignee** and pick your name or Sharon's.
7. Click **Save** in the task.



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

Monday morning

Two looks: the case board for every open case by stage, and the Money out list for every fee still open.

The case board:

1. In the left menu, click **Repair Stages**.
2. At the top left, pick the pipeline **APPRAISAL CASES**.
3. 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.



Picture: Repair Stages: the pipeline APPRAISAL CASES picked at the top left (circled), the cards in their stage columns 1.1 to 6.3.

The Money out list:

1. In the left menu, click **Contacts**.
2. Along the top of the list are saved lists; click **Money out**.
3. It shows every hired case whose **Fee paid** is still **No**.

Questions and answers, in John's words

Answers: quick answers, with the clicks, to the questions John asks most: where is the case? where are the notes? what is the RO number? why did a task disappear? why is there no blue Save button?

Short answers, each with the clicks to get there. Each points to the article with the detail. Every route starts in the left menu: the dark menu down the left edge of every screen.

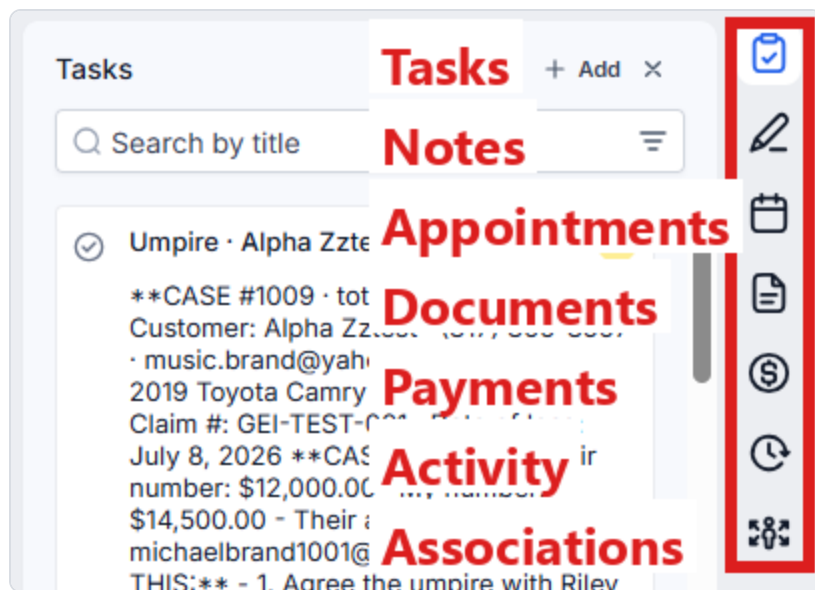
Getting started

1. **What is pdrOS, in one sentence?** An office employee trained on your cases: it types, sends, chases, counts and remembers; you decide. [What pdrOS is](#)
2. **What do I actually do all day?** Work your tasks, one at a time. In the left menu, click **Tasks**. Click a task's row, then click **Open Full View** and read **DO THIS**. Do the one step it names. Then click the green **Mark Complete** button at the bottom right of the full view. [Your day](#)
3. **Where do I start a new case?** On the **Appraisal Case Sign-Up Form**. Open your signup link from your bookmarks (on your phone, the icon named "Signup"). Fill it with the customer on the phone, or text or email the link to them. A customer who was referred by a shop or texted the 610 already has their own link in your task or alert: use that one. [The signup form](#)
4. **Do I have to remember what to do next?** No. A task tells you when it is your turn, with the steps. To see your tasks, click **Tasks** in the left menu. [The Tasks page](#)
5. **A task disappeared before I marked it.** If the task is already gone when you come back, pdrOS closed it because the step happened. Only three tasks close themselves today:  Demand not sent,  Our report not sent and  Counteroffer not sent (they close when the email finally goes). Every other task waits for you to click **Mark Complete**. To find a closed task: in the left menu, click **Tasks**, then click the **Completed** box at the top. [The Tasks page](#)
6. **What are the three things I do in a case?** Upload a PDF, type a number or a date, set a Send switch. All three happen on the left side of the customer's contact profile. [What pdrOS is](#)
7. **Is it safe to type into a field to see what happens?** No. Fields do work. Type real things when they are true. Nothing happens until you click the blue **Save** button at the bottom of the left side; after that, the change does real work. [The one rule](#)
8. **Where is everything?** pdrOS opens in your web browser at **app.bc3d.agency**; sign in with your email and password. Then everything is in the left menu. **Tasks** is your to-do list. **Contacts** holds each customer's contact profile, where the case lives. **Conversations** has every text and email. **Calendars** shows your inspections. **Invoices** holds the fees. **Repair Stages** is the case board. **RO Hub** lists every case. **Support** is where you ask the chat or open a ticket. [Where things live](#)

The contact profile

1. **Where is the case?** On the customer's contact profile: one screen with everything about that customer and their case. 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. 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. [Find a case](#)
2. **How do I find a case?** Search in **Contacts**: it finds a customer by name, phone, email, RO number or RO Type (the route is in question 9). Or start from a task: open the task on the Tasks page and click the link under **WHERE** (it follows the words "Open the case"). The contact profile opens in a new browser tab. [Find a case](#)
3. **What is the RO number?** The number pdrOS gives every case: your case number. Tasks show it as "CASE #1007", texts to you as "case #1007", and customers see "file #1007": all the same number. On the contact profile it is the field **RO# DO NOT EDIT THIS!!** in the folder **Contact**, the first folder on the left side. pdrOS sets it; never change it. To find a customer by it, type it into the search box in **Contacts**. [Every field](#)
4. **What is the left side?** The folders of fields, 15 of them, top to bottom. **CASE** is the one you use most. Your own four come right after **Contact**, near the top: **CASE, CARRIER & APPRAISER, OUTCOME** and **SHORT PAY & INSPECTION**. To open one: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder and click the folder's name to open it. Can't find a field? Type its name in the search box at the top of the left side (it reads **Search fields and folders**). [The folders on the left side](#)
5. **What is the right edge for?** It is a narrow column of small icons on the far right of the contact profile. **Notes** shows everything pdrOS did, newest at the top. **Tasks** shows this customer's tasks (add, change, reassign). **Appointments** is where you book, move and cancel an inspection. **Documents** lists every file. To see it: 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 the customer's name in the list. On the far right edge of the contact profile, hold the mouse over an icon to see its name. Click it to open its panel beside it. [Notes, tasks and appointments](#)
6. **How do I see what the system did on a case?** Read the notes: each one says what pdrOS did, with the time. Where they are: question 15. [Notes, tasks and appointments](#)
7. **Where are the notes?** On the far right edge of the contact profile. 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 the customer's name in the list. 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. Notes also appear in the middle of the contact profile, mixed in with the texts

and emails, in time order. To add your own: click + **Add** at the top of the notes, type a title and the note, and click **Save** in the note. [Notes, tasks and appointments](#)



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

1. **Where are the PDFs?** The quick way: 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 and lists the case's documents; click the one you want and it opens in a new browser tab. It lists the signed agreement (**Repair Authorization Form**), the signup sheet (**Customer Signup Form**), your report (**Shop Estimate**), their report (**Supplement #1 Estimate**) and the photo report (**Scope Sheet Images**). Under **APPRAISAL CASE** it also lists the customer's uploads (**Carrier Valuation Report**, **Repair Invoice**, **Shop Estimate PDF**, **Carrier Estimate PDF**) and your **RTA or Demand PDF**. When you are already on the contact profile, an uploaded file also opens by clicking its name in its field; only the address fields (**Repair Authorization Form PDF** and the like) do not open. [Documents](#)
2. **What does Case status mean?** The one plain sentence for this stage; it is what Sarah says if the customer asks. pdrOS writes it in the field **Case status**. To read it: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it. Find **Case status**. [Every stage](#)
3. **What is Stage rank?** A number pdrOS uses; leave it. It is in the folder **CASE**. [Every field](#)
4. **No blue Save button appeared.** Changes to fields are saved only when you click the blue **Save** button at the bottom of the left side; until then nothing happens and nothing is sent. 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). [The one rule](#)

The Send switches

1. **What are the Send switches?** Five lists at the top of the folder **CASE** that send the range, the demand, your report, the counter and the summary as you. From the top: **Send range**, **Send demand**, **Send our report**, **Send counter** and **Send summary**. To reach them: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it. The switches sit at the top of it, right after **Case status**. [The Send switches](#)
2. **Send it now or I sent it myself?** **Send it now** when pdrOS should email it; **I sent it myself** when you already did. The switches are at the top of folder **CASE** (the route is in question 20). Click the box under the switch and pick one. Click the blue **Save** button at the bottom of the left side. [The Send switches](#)
3. **It says Not sent (see task). Now what?** A field the switch needs is empty or wrong. In the left menu, click **Tasks**. Click the task's row (a  task, or **A Send switch could not act** for the range and the summary), then click **Open Full View**: it names what is missing. Click the link under **WHERE** to open the contact profile. Type the field's name in the search box at the top of the left side (it reads **Search fields and folders**) and fill the field. Click the blue **Save** button at the bottom of the left side. Wait one minute. Type the switch's name in the same search box, click the box under it and pick **Send it now**. Click the blue **Save** button again. [The Send switches](#)
4. **I set a switch and nothing happened.** First check that you clicked the blue **Save** button at the bottom of the left side. Then wait two minutes and read the newest note (the route is in question 15). Still **Send it now** after five minutes? You get a text and the task **A Send switch did not go**. Then: 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it. Click the box under the switch and pick **Not sent (see task)** (never **I sent it myself**: that one records a send). Click the blue **Save** button. Wait one minute. Pick **Send it now** and click the blue **Save** button again. Then mark the task complete on the Tasks page. [If this, then that](#)
5. **Can I send the range twice?** Yes: change the figures and send again. Send range goes again at once, so check the figures before you set it. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it. Click in the box under **Range low** or **Range high** and type the new amount. Click the box under **Send range** and pick **Send it now**. Click the blue **Save** button at the bottom of the left side. [Your report and the range](#)

6. **Can I resend the RTA?** Yes, once you clear the sent date. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it. Click in the box under **RTA or demand sent date** and delete the date. If the RTA changed, scroll up to the folder **CASE** and click its name to open it; in **RTA or demand PDF**, click the trash can icon to the right of the old file's name to remove it, then click **Click to upload**, pick the new PDF and click **Open**. Click the blue **Save** button at the bottom of the left side. Wait one minute. At the top of folder **CASE**, click the box under **Send demand** and pick **Send it now**. Click the blue **Save** button again. [The RTA](#)
7. **What does Send demand need?** Five things. The **RTA or demand PDF** (folder **CASE**). The signed agreement (**Agreement signed date**, folder **CASE**; pdrOS fills it when the customer signs). The claim number (**Claim #**, folder **Insurance Info**). The date of loss (**Date of Loss**, folder **FORM | Repair Authorization**). A valid adjuster email (**Adjuster email**, folder **CARRIER & APPRAISER**). **Adjuster name** only prints in the demand email; fill it before Send demand. To check them: 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 the customer's name in the list. On the left side of the contact profile, scroll down to each of those folders and click the folder's name to open it. [The RTA](#)
8. **What does Send summary need?** **Award amount** (folder **OUTCOME**) and **Carrier's offer** (folder **CASE**). On a total loss also **Title fees** and **Sales tax %** (folder **OUTCOME**) and **Deductible** (folder **Insurance Info**). To check them: 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 the customer's name in the list. On the left side of the contact profile, scroll down to each of those folders and click the folder's name to open it. [The settlement summary](#)
9. **Why was my demand refused with a date?** It already went on that date. To send a corrected one, see question 25. [The RTA](#)

Documents and reports

1. **What does the customer have to send on a total loss?** The insurer's valuation report. [Documents](#)
2. **And on a diminished value?** The repair invoice, the mileage and photos. [Diminished value](#)
3. **The customer put the report in the wrong box.** On a total loss it still counts. [Documents](#)
4. **How long does pdrOS chase documents?** Reminders at day 2 and 12, tasks for you at day 5 and 19, then it stops. [Timers](#)
5. **Where do I upload my report?** In **Upload Estimate Doc Here**, folder **Estimates**. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **Estimates** and click the folder's name to open it. In **Upload Estimate Doc Here**, click

Click to upload, pick the PDF on your computer and click **Open**. Click the blue **Save** button at the bottom of the left side. [Your report and the range](#)

6. **Where does their report go?** In **Supplement #1 Upload Doc Here**, folder **Supplements**. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **Supplements** and click the folder's name to open it. In **Supplement #1 Upload Doc Here**, click **Click to upload**, pick the PDF on your computer and click **Open**. Click the blue **Save** button at the bottom of the left side. [Negotiation](#)
7. **I uploaded a corrected report. Did anything re-send?** No, only a note. To read it: 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 the customer's name in the list. 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. [Your report and the range](#)
8. **Can I restart the reminders?** Yes, by asking us. Tell us: in the left menu, click **Support**, then the orange **Support Ticket** button. Give the RO number and write "please restart the document reminders". We do it on our side within the hour; the schedule restarts from day 2. [Documents](#)

Range, agreement, fee

1. **What does the customer get when I send the range?** A text, the agreement link, and the email with the figures. [Your report and the range](#)
2. **Do I still send RTAflow's range?** No. Only from pdrOS. [The habits](#)
3. **How does the customer sign?** On their phone from the link; they type the VIN and the vehicle. [The agreement and the fee](#)
4. **Who sends the invoice?** pdrOS, through Square, the moment they sign, when the fee is standard and the owner pays. [The agreement and the fee](#)
5. **The fee is different on this case.** Type the fee in **Fee amount** before they sign; you get a task to invoice by hand. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it. Click in the box under **Fee amount** and type the amount (numbers only, no dollar sign). Click the blue **Save** button at the bottom of the left side. [Invoices and payments](#)
6. **The shop is paying.** Set **Fee payer** to **Shop**: no invoice goes to the owner, and you get a task to invoice the shop. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it. Click the box under **Fee payer** and pick **Shop**. Click the blue **Save** button at the bottom of the left side. [Short pay](#)

7. **They paid by Venmo. What do I do?** Set **Fee paid** to **Venmo** first, then record the payment on the Square invoice if one went. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it. Click the box under **Fee paid** and pick **Venmo** from the list. Click the blue **Save** button at the bottom of the left side. Then, if a Square invoice went: in the left menu, click **Invoices**. Find the customer's invoice in the list and click the three dots at the right end of its row, then **Record Payment**, then **Record Manually**. Pick the choice that fits Venmo (**Other** if it is offered), type the amount and the date, and click **Submit**. [Invoices and payments](#)
8. **Can I waive the fee?** Yes: set **Fee paid** to **Waived**. It closes the case like a payment. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it. Click the box under **Fee paid** and pick **Waived** from the list. Click the blue **Save** button at the bottom of the left side. If a Square invoice already went, void it: in the left menu, click **Invoices**. Find the customer's invoice in the list, click the three dots at the right end of its row, then **Void**. [Fee and close](#)
9. **Who has not paid me?** The saved list **Money out**. In the left menu, click **Contacts**. Along the top of the list are saved lists; click **Money out**. It shows every hired case whose **Fee paid** is still **No**. [Invoices and payments](#)

The other side

1. **How does the adjuster get the RTA?** As an email from you, with the RTA and the signed agreement attached. It goes the moment you pick **Send it now** in **Send demand** and click the blue **Save** button. [The RTA](#)
2. **Where do I read the adjuster's reply?** In the adjuster's own conversation, under their name. Your phone tells you when it lands. In the left menu, click **Conversations**. On the left is the list of people; click **Unread** at the top of the list to see new messages. Click the adjuster's name: their thread opens in the middle. [Your own messages](#)
3. **What is Clock A?** The 7 to 10 business days their appraiser has to call. Day 10 you get a text and task; day 17 another task. [The RTA](#)
4. **Their appraiser called. What do I type?** Their name, email and the contact date. Clock A stops, the customer gets a text, and you get the task **Their appraiser is in contact · send our report**. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it. Click in the box under **Other appraiser name** and type the name. Click in the box under **Other appraiser**

- email** and type the email. Click the box under **Other appraiser contact date** and pick the day in the calendar that opens. Click the blue **Save** button at the bottom of the left side. [The other appraiser](#)
5. **How does my report get to them?** Through **Send our report**. It goes as you, with the repair invoice, the two estimate PDFs and the photo report when the case has them. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CASE** and click the folder's name to open it. Click the box under **Send our report** and pick **Send it now**. Click the blue **Save** button at the bottom of the left side. [The other appraiser](#)
6. **How long until pdrOS chases their report?** Day 10 and day 17 emails; day 22 a task for you. [The other appraiser](#)
7. **Does Sarah ever answer an adjuster?** Never. Their emails are not in a customer's conversation. [Sarah](#)

Negotiation

1. **They gave me a number. Where do I put it?** In **Their number**, folder **CARRIER & APPRAISER**. Every chase stops and you get the Negotiate task. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it. Click in the box under **Their number** and type the amount (numbers only, no dollar sign). Click the blue **Save** button at the bottom of the left side. [Negotiation](#)
2. **How do I counter?** Type **Counteroffer** and a one-line **Negotiation note**, then send it with **Send counter**. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it. Click in the box under **Counteroffer** and type the amount (numbers only, no dollar sign). Click in the box under **Negotiation note** and type one line. Scroll up to the folder **CASE** and click its name to open it. Click the box under **Send counter** and pick **Send it now**. Click the blue **Save** button at the bottom of the left side. [Negotiation](#)
3. **What does the counter email say?** You are at X, my valuation supports Y, I can agree today at Z, with your note. [Negotiation](#)
4. **No answer to my counter?** Day 7 you get a text and task. [Negotiation](#)
5. **I cleared Their number by accident.** Nothing stopped. Type 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it. Click in the box under

Their number and type the amount (numbers only, no dollar sign). Click the blue **Save** button at the bottom of the left side. [If this, then that](#)

6. **How do I go to the umpire?** Set **Umpire** to **Called**. The customer gets a text and an email on how it works and that you will invoice them for their half; you get a three-step task. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **CARRIER & APPRAISER** and click the folder's name to open it. Click the box under **Umpire** and pick **Called** from the list. Click the blue **Save** button at the bottom of the left side. [The umpire](#)
7. **Who pays the umpire?** The fee is shared equally with the insurer. You send the customer an invoice for their half and release your valuation to the umpire once it is paid. [The umpire](#)

Settlement

1. **How do I settle a case?** Type **Award amount** and **Award signed date**. The customer gets the Settled text and email; you get the task **Check the settlement summary**. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **OUTCOME** and click the folder's name to open it. Click in the box under **Award amount** and type the amount (numbers only, no dollar sign). Click the box under **Award signed date** and pick the day in the calendar that opens. Click the blue **Save** button at the bottom of the left side. [The award](#)
2. **What is in the settlement summary?** Award, sales tax, title fees, deductible, net to the customer, and how much more than the first offer. [The settlement summary](#)
3. **Does pdrOS do the arithmetic?** Yes: tax, net and recovery over offer, written into the folder **OUTCOME** and the email. [The settlement summary](#)
4. **Does the customer get the award itself from pdrOS?** No, only the summary of the numbers. The signed award itself goes the way it does now, outside pdrOS. [The award](#)
5. **When does a case close?** A hired case: when **Outcome** (folder **OUTCOME**) has a final value (not **Counteroffer pending**, **Carrier review report received** or **Court**) and **Fee paid** (folder **CASE**) is not **No**. A case the customer never signed: on any final Outcome. [Fee and close](#)
6. **What happens at the close?** Sarah switches off for that customer, and every reminder and clock stops. On a won case, the customer gets a thank-you text with the Google review link. [Fee and close](#)
7. **The customer went to court. What do I set?** **Outcome** to **Court**. The case stays open at 6.2 and waits for you; the customer is not asked. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **OUTCOME** and click the folder's

name to open it. Click the box under **Outcome** and pick **Court** from the list. Click the blue **Save** button at the bottom of the left side. [Other endings](#)

8. **They took the insurer's number against my advice. Outcome to Customer took the carrier's number.** The case closes as lost (if the fee on a hired case is still unpaid, it waits at 6.1 Fee due first). 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **OUTCOME** and click the folder's name to open it. Click the box under **Outcome** and pick **Customer took the carrier's number** from the list. Click the blue **Save** button at the bottom of the left side. [Other endings](#)
9. **They vanished. Outcome to Went quiet.** The case closes as abandoned. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **OUTCOME** and click the folder's name to open it. Click the box under **Outcome** and pick **Went quiet** from the list. Click the blue **Save** button at the bottom of the left side. [Other endings](#)

Other case types

1. **What is different on a diminished value?** The customer is the claimant: the demand goes to the other driver's insurer, with your report. pdrOS chases it three times and tracks the two-year court deadline from the date of loss. [Diminished value](#)
2. **Who sets the statute deadline?** pdrOS, two years from the date of loss, in **Statute deadline** (folder **CARRIER & APPRAISER**). The customer gets a text with the date; you get texts 14 and 3 days before. [Diminished value](#)
3. **What does Sharon do on a short pay?** Enters the shop's estimate in CCC1 when both estimates are in. Her task has the files (on the Tasks page: the task's row, then **Open Full View**). [Short pay](#)
4. **How does the shop send estimates?** From the upload link in the email pdrOS sends them at signup. [Short pay](#)
5. **How does an inspection get booked?** The customer taps the booking link, or you book from the customer's contact profile. 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 the customer's name in the list. On the far right edge of the contact profile, click the **Appointments** icon (a calendar). Click **+ Add** at the top of the panel, then **Meetings**. The **Book appointment** window opens. Under **Calendar**, make sure it reads **Inspections Calendar**. Under **Date & time**, pick the day under **Date** and a free time under **Slot**. Click the blue **Book appointment** button at the bottom right. [Booking](#)
6. **The customer did not show.** Set the appointment to **No show**. They get the rebook text and link, you get a text. 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 the customer's name in the list. On the far right edge of the contact profile, click the **Appointments** icon (a calendar). Click the three dots at the right of

the appointment and pick **Edit**. The **Edit details** panel opens. At the bottom, click the box next to **Status** and pick **No show**. Click **Save**. [Booking](#)

7. **After the report, what do I set? Engaged against: None, Shop or Carrier.** 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **SHORT PAY & INSPECTION** and click the folder's name to open it. Click the box under **Engaged against** and pick the customer's choice from the list. Click the blue **Save** button at the bottom of the left side. [Engaged against](#)

8. **Report only: does it close by itself?** Yes, after the fee. [Engaged against](#)

Sarah and messages

1. **What does Sarah say to customers?** Where the case stands, what you need, how it works. Never a figure, a date or a name. [Sarah](#)
2. **When does Sarah hand to me?** Offers, releases, umpire, court, deadlines, or "I want a person" (money questions go to Sharon as a task). She sleeps eight hours on them. [Sarah](#)
3. **Can I turn Sarah off on one customer?** Yes, through us: her switch is not on your screen. In the left menu, click **Support**, then the orange **Support Ticket** button, and give the customer's name and "please switch Sarah off". We do it within the hour and switch her back on when you say. You can answer any customer yourself at any time without switching her off. [Sarah](#)
4. **A customer wrote refund.** You get an URGENT text and task at once; call them. [Sarah](#)
5. **Someone texted the 610 and I don't know them.** Sarah asked who they are; you got a text with a signup link for that same person. Use it. To read what they wrote first: in the left menu, click **Conversations**, then click their phone number in the list. [A text from someone with no case](#)
6. **A customer has two cases on one phone.** Their texts land on the older contact profile. If that case is closed, Sarah is off there and nobody answers. Tell us the day the new case opens and we move the number to the new one. [If this, then that](#)
7. **Can I email a customer myself?** Yes, from the message box on their contact profile; saved replies and attachments are 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. Click the customer's name in the list. At the bottom of the middle of the contact profile is the message box. At its left end, click the small button with a down arrow and pick **Email**. Type a subject, then click in the box and type your message. For a saved reply, click the **Snippets** icon in the message box (hold the mouse over the small icons to find it). To attach a file, click the paperclip icon and pick the file. Click the paper-plane button at the right end to send. [Your own messages](#)

Mistakes

1. **I picked hail by mistake on the signup.** Set **RO Type** to the right type, then tell us. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **REPAIR STATUS** and click the folder's name to open it. Click the box under **RO Type** and pick the right type from the list. Click the blue **Save** button at the bottom of the left side. Then tell us: in the left menu, click **Support**, then the orange **Support Ticket** button. Give the RO number and write "please restart the intake". We do it on our side within the hour. [Wrong type or type changed](#)
2. **I changed the type after they signed.** You got a text; have them sign again from the new link. 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 the customer's name in the list. On the left side of the contact profile, scroll down to the folder **FORM LINKS** and click the folder's name to open it. Click in the box under **REPAIR AUTHORIZATION LINK**. Press **Ctrl** and **A** together to select the whole link, then **Ctrl** and **C** to copy it (on a Mac, **Cmd**). Do not type in the box; if a blue **Save** button appears, click **Cancel** next to the blue **Save** button instead of saving. At the bottom of the middle of the contact profile is the message box. At its left end, click the small button with a down arrow and pick **SMS**. Click in the box and paste the link alone, with no words around it (press **Ctrl** and **V**). Click the paper-plane button at the right end to send. [Wrong type or type changed](#)
3. **A booking landed on nobody.** You got the text "NAME (phone number) booked an inspection but has no appraisal case": someone typed a name into **Calendars**, or a stranger booked. Send them the signup link alone in a text, or cancel the appointment; both are click by click in [If this, then that](#) under Booking. Always book from the customer's contact profile ([Calendar](#)).
4. **What is my email address in pdrOS? john@collisionsafetyconsultantspa.com.** Every email pdrOS sends for you goes from it, and so does anything you write from the message box. Replies come back into pdrOS (the customer's thread, or the other side's conversation), not into a separate inbox. [Your own messages](#)
5. **Can I use pdrOS on my phone?** Yes: the phone app (called LeadConnector in the App Store and Google Play), with the same email and password. It shows Conversations, Contacts, Calendars and your tasks. Alerts come as plain texts either way. [Where things live](#)
6. **Something does not fit how I work.** Tell us; we change the step. Do not work around it. In the left menu, click **Support**, then click the orange **Support Ticket** button. [Getting help](#)

Questions about the system itself: signing in, your phone, saving, texts, files, support

Answers: how do I sign in? what if I forgot my password? why is there no Save button? did my change save? why did a task come back? who gets which text? why did the customer not get my text or email? what file types can I upload? can I delete something? how do I reach a person, and what should I send?

The questions that are not about any one case: the sign-in, the browser, the phone, saving, texts, files, and how to get help. Short answers, each with the clicks, and the article with the detail. Every route starts in the left menu, the dark menu down the left edge of every screen. For questions about a case (the switches, the stages, the money), see [Questions and answers, in John's words](#).

Signing in and the screen

1. **Where do I sign in?** In your web browser at **app.bc3d.agency**, with your email and your password. Bookmark it. [Where things live](#)
2. **I forgot my password.** On the sign-in page, click **Forgot password?** and follow the email it sends to your sign-in address. If no email comes within a few minutes, check spam, then tell us (the other person in the office can open a ticket for you: in the left menu, click **Support**, then the orange **Support Ticket** button).
3. **Which email do I sign in with?** The one we set up for you. It does not change on its own. If you are not sure which one it is, ask us.
4. **The screen looks wrong, a button is missing, or a page will not load.** In this order: press **F5** to reload the page (on a Mac, **Cmd** and **R**); open pdrOS in a new browser tab; sign out and sign back in; try a private window (in Chrome, **Ctrl**, **Shift** and **N** together); try another browser. If it is still wrong, tell us what you clicked, what you expected, and send a screenshot (press the Windows key, **Shift** and **S** together, drag a box, then paste it into the ticket).
5. **Which browser should I use?** Any current one: Chrome, Edge, Safari or Firefox. If something misbehaves in one, try another.
6. **I cannot see the blue Save button.** It appears at the bottom of the left side of the contact profile only after you change a field. If you changed one and still cannot see it, your browser is zoomed in: press **Ctrl** and **0** (zero) together to go back to 100 percent (on a Mac, **Cmd** and **0**). If it is still not there, Auto-Save has been switched on: stop and tell us. [The one rule](#)
7. **Is John's screen the same as Sharon's?** Yes. You both see every case, every folder, every task and every conversation. Only the **Tasks** page differs: **My Tasks** shows the tasks assigned to the person signed in; **All Tasks (Admin)** shows everyone's. [The Tasks page](#)
8. **What is the Dashboard?** The top item in the left menu. It shows nothing you need; start at **Tasks** instead. [Your day](#)

9. **Why can I not see Settings?** Settings are ours. Everything you change in a case, you change on the customer's contact profile. If something in Settings needs changing (a template's wording, a phone number for alerts, who gets a task), tell us and we change it.
10. **Why do the Tags on a contact profile not let me add or remove anything?** On purpose. Tags are how pdrOS keeps its own bookkeeping; the two things people used to do with tags (restart an intake, chase documents again) are done by us when you ask. [Wrong type, or the type changed later](#)

Your phone

1. **Can I use pdrOS on my phone?** Yes, two ways. The phone app (called **LeadConnector** in the App Store and Google Play; sign in with the same email and password) shows **Conversations, Contacts, Calendars** and your tasks. Your phone's browser opens the full pdrOS at app.bc3d.agency, including this guide. The Tasks page and the contact profile are easier on a computer. [Where things live](#)
2. **The phone app does not show Support, RO Hub or Forms / Pics.** Right: the phone app shows only its own screens. This guide, the support chat and the ticket button are at <https://pdros-guide.pages.dev/cscpa/> in your phone's browser; add it to your home screen next to your other links. [Your three links](#)
3. **I got a new phone.** Install the LeadConnector app from the App Store or Google Play and sign in with the same email and password. Add your links to the new home screen again ([Your three links](#)). If your mobile number changed, tell us: the alerts go to the number we have.
4. **Do alerts need the app?** No. Alerts come as plain texts to your phone, app or no app. [Texts to your phone](#)
5. **What happens when a customer calls the 610 number?** Texts and emails are what pdrOS handles for you; ask us how calls to the 610 number are routed today, and tell us if you want that changed.

Saving and fields

1. **How do I know a change saved?** After you click the blue **Save** button, the "1 change made" line at the bottom of the left side disappears. Press **F5** to reload and the field still shows your value. Within a minute, if the field starts work, a new note appears (far right edge, the **Notes** icon, newest at the top). [The one rule](#)
2. **I typed in a field by mistake. How do I undo it?** If you have not clicked **Save**, click **Cancel** next to the blue **Save** button; the change is thrown away. If you already saved, put the old value back and save again. If the field starts work (it is marked $\prec$ in the field reference), tell us what you typed and when; some work cannot be taken back once it has gone. [Every field](#)
3. **Two of us changed the same contact profile at the same time.** The last **Save** wins, field by field. Reload the page (**F5**) before you type when you know the other person is in the same case.

4. **A field changed on its own.** pdrOS writes many fields itself (dates, Case status, the figures in OUTCOME, the Send switch readings). The notes say what it did and when. Fields marked "pdrOS fills this; leave it" in the field reference are never yours to type. [Every field](#)
5. **Why does a number field refuse what I type?** Numbers only, no dollar sign, no comma: type 14500 or 14500.50. Dates are picked from the little calendar that opens when you click the box.
6. **How do I clear a 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. Then click the blue **Save** button.
7. **Can I add my own notes?** Yes: far right edge of the contact profile, the **Notes** icon (a pen), then + **Add**, type, **Save**. Your notes start nothing; they are for you and for us. [Notes, Tasks and Appointments](#)
8. **Where did the notes I typed on the signup form go?** To **Customer Signup Notes** in the folder **Contact** on the customer's contact profile, kept as written. They start nothing. [The signup form](#)
9. **Why do some fields show "--"?** Empty. pdrOS fills many of them as the case moves; others are yours when the step comes. An empty field is never an error by itself.
10. **Can I delete a contact profile?** Do not. A deleted contact profile takes its texts, emails, files and notes with it and cannot be put back. If a profile is a mistake (a test, a duplicate, a stranger), tell us and we tidy it.

Tasks

1. **A task I completed came back.** Two different things look alike. A new task with the same name is a new round: the chases and clocks make a fresh task each time they fire (the document chase, for example, gives **Chase documents** at day 5 and **Nothing after three weeks · close it?** at day 19). A task that reappears within a minute of being completed was not saved: open it again and click the green **Mark Complete** button once more. [The tasks you will see](#)
2. **I marked a task complete without doing the step. What happens?** Nothing moves. pdrOS watches the fields, not the task list: the case waits until the field, the file or the switch the task asked for is there, and the clocks keep running. Go back and do the step. [The one rule](#)
3. **What does Overdue mean?** The task's due time has passed. Nothing else happens to the case because of it; the reminders and clocks run on their own schedule. Do it next.
4. **I see a task assigned to Sharon in my list (or John's in hers).** You are on **All Tasks (Admin)**, which shows everyone's tasks. Click **My Tasks** for your own. Either of you can complete either's task; the step matters, not the name on it.
5. **A task still shows old information about the case.** A task's text is written the moment the task is created and does not update afterwards. The contact profile is always current: click the link under **WHERE**. [The Tasks page](#)

6. **The task has no Open Full View button.** A very short task (for example **User query**) shows everything in its preview. Click the row, read it, and mark it complete with the box at the left of its row.
7. **I got two tasks that say the same thing.** Complete both. If it keeps happening for the same step, send us the RO number and the two task names.
8. **Can I give a task to Sharon, or make my own?** You can make one for either of you: on the customer's contact profile, far right edge, the **Tasks** icon (a clipboard with a check mark), then **+ Add**, a title, the **Assignee**, **Save**. It is a plain reminder; pdrOS does not act on it. [Notes, Tasks and Appointments](#)
9. **Tasks for a closed case are still in my list.** Complete them; closing a case stops the clocks and Sarah, it does not tidy your list.
10. **How often should I look at the Tasks page?** Morning, after lunch, and before you leave. Anything urgent reaches your phone as a text anyway. [Your day](#)

Texts to your phone

1. **Who gets which alert?** Each alert goes to the phone number we set for it: alerts about a case go to John; the office alerts (the CCC1 entry on a short pay and Sarah's office hand-offs) go to Sharon. Tell us to change who gets which. [Texts to your phone](#)
2. **I stopped getting alerts.** Check that your phone has not blocked the number the alerts come from, and that you did not reply STOP to it. Then tell us your mobile number so we can check which number the alerts are set to.
3. **Can I reply to an alert text?** A reply does nothing. Act on the case instead: the alert names the RO number and the task has the steps.
4. **Can Sharon get the case alerts too?** Yes, any alert can go to more than one phone; tell us which ones.
5. **Why did I get an alert about a customer I do not know?** Someone texted the 610 number or booked an inspection without a case, or a shop referred a customer. The alert tells you which, and what to send them. [A text from someone with no case](#)

Customers' texts and emails

1. **The customer says they got no text.** Open their contact profile. In the middle, the text shows as sent, with the time. If it is there: check the **Phone** in the folder **Contact** (a wrong digit, or a landline), and check the **DND** tab next to **All fields** (if **Text Messages** or **DND All Channels** is ticked, no text goes). A customer who replied STOP to the 610 number is on DND by their own choice; they must text START to come back. If none of that explains it, tell us. [The customer's thread](#)

2. **The customer says they got no email.** Same check in the middle of their contact profile. Ask them to look in spam for mail from "Collision Safety Consultants of PA"; emails come from john@collisionsafetyconsultantspa.com. [Emails and texts you send yourself](#)
3. **The customer's phone number or email changed.** Open their contact profile, folder **Contact**, change **Phone** or **Email**, click the blue **Save** button. From then on texts and emails go to the new one. If the new number already belongs to another of your customers, read the next question first. [Find a case](#)
4. **Two customers share one phone number.** Texts from that number land on the older contact profile. Tell us the day you see it; we move the number to the case that is live. [When something goes wrong](#)
5. **Why did a link in my text break?** It was sent with words around it. Send the link again, alone in its own text. [When something goes wrong](#)
6. **The customer says the link does not work.** The signup, agreement and upload links do not expire. The booking link works only on an open post-repair inspection case; on any other case it says so. Ask them which message the page shows and tell us. [Post-repair inspection: booking](#)
7. **Links in the email show as plain text.** Some mail programs (Yahoo, for one) show the address without making it clickable. The customer can copy it into the browser's address bar. Gmail shows them as links.
8. **Who signs what the customer gets?** Every automatic text is Sarah's, so the customer has one name to answer on the 610 number; when Sarah answers by email she signs Sarah Miller. The emails about the case itself (your range, the settlement summary) and everything you write yourself go out as you, John. [Sarah](#)
9. **Can I see every text and email that went to a customer?** Yes, in the middle of their contact profile, oldest at the top, newest at the bottom, with the time. Emails to the adjuster or the other appraiser are in that person's own conversation, not the customer's. [The customer's thread](#)
10. **Can I text or email a customer myself?** Yes, from the message box at the bottom of the middle of their contact profile. Pick **SMS** or **Email** with the button at its left end. [Emails and texts you send yourself](#)
11. **Can I send one text to many customers at once?** Not from your screen. If you ever need to, tell us what and to whom.
12. **A customer wants no more texts.** Open their contact profile, click the **DND** tab next to **All fields**, tick **Text Messages**. It saves by itself. Reminders then stop for them; you call instead. Untick it to resume. [The customer's thread](#)
13. **Does the customer see my notes or the tasks?** No. Notes and tasks are inside pdrOS. The customer sees only texts, emails, the forms and the invoice.

Documents and files

1. **What file types can I upload? RTA or demand PDF** takes PDF only. **Upload Estimate Doc Here** and the other document fields take PDF, PNG, JPG, DOC, DOCX, XLS, XLSX and CSV. When in doubt, save it as a PDF first. [Documents](#)
2. **How do I replace a file?** Click the trash can to the right of the old file's name, then **Click to upload** the new one, then the blue **Save** button. Every file left in a field goes out with the next email that uses that field, so remove the old one first. [The Send switches](#)
3. **Does removing a file un-send anything?** No. What went out, went out. Removing a file only changes what goes next time.
4. **Can I upload from my phone?** Yes: in the phone app, open the contact, find the field, tap **Click to upload** and pick the file or a photo. On a computer it is the same button.
5. **Where does a file go after I upload it?** It stays in its field on the contact profile, it is listed under the **Documents** icon on the far right edge, and it appears in RO Hub's **Docs** window. Files the customer uploads land the same way. [Documents](#)
6. **The customer uploaded a photo of the document instead of a PDF.** It still counts and still attaches. If you want a cleaner copy, ask them for the PDF and replace it.
7. **Is anything ever deleted by pdrOS?** No. pdrOS adds files and notes; it removes nothing. Files stay on the contact profile for as long as the case exists.
8. **Can I get a copy of everything on a case?** Every PDF opens from RO Hub's **Docs** window in a new tab, and the download button in the browser saves it. For the whole case in one go, ask us. [Documents](#)
9. **Can I export my list of cases?** Yes: in the left menu, click **RO Hub**, click the **RO List** tab, then **Export CSV** at the right. It opens in Excel. [Find a case](#)

Sends and the other side

1. **"Sent" is showing, but did they receive it?** Sent means the email left with its attachments; the note names who got it and what was attached. Delivery to their mailbox is theirs to confirm. If a reply never comes and the chase emails bring nothing, call them and tell us. [The Send switches](#)
2. **The adjuster changed mid-case.** Open the contact profile, folder **CARRIER & APPRAISER**, change **Adjuster name** and **Adjuster email**, click the blue **Save** button. From then on the demand, the report and the chases go to the new one. What already went stays in the old adjuster's conversation. [The RTA](#)
3. **I typed the wrong claim number and the demand already went.** Fix **Claim #** (folder **Insurance Info**), save, then send a corrected demand (clear the sent date first; the steps are in [The Send switches](#)). Tell the adjuster in a line of your own.

4. **Where is the adjuster's reply?** In the adjuster's own conversation: in the left menu, click **Conversations**, type their name in the search box at the top left, click their name. Your phone also got a text when they replied. [The Send switches](#)
5. **Does the other side ever hear from Sarah?** Never. Sarah talks only to your customers. [Sarah](#)
6. **I sent the demand by hand from my own email.** Set the switch to **I sent it myself** so the dates and the clocks start; nothing goes out a second time. [The Send switches](#)

Stages and the board

1. **Can I move a card on the Repair Stages board?** Look, never drag. The stage follows the fields; dragging a card moves nothing underneath and confuses the picture. Pick **APPRAISAL CASES** at the top left to see your cases. [Every stage](#)
2. **A case went backwards a stage.** A field it depends on was cleared or changed; the notes say which. Put the value back and the stage follows. [Every stage](#)
3. **Why does the picker also show Repair Process and RENTAL FLEET?** They belong to the shop side of pdrOS and are empty for you. Ignore them.

Closing and reopening

1. **I closed a case by mistake.** Tell us the RO number straight away. A closed case ignores its switches, Sarah is off for that customer, and the clocks are stopped; we reopen it from our side. Do not open a second case for the same claim. [Other endings](#)
2. **Can I set a switch on a closed case?** No. It does nothing, and five minutes later you get the "It did not go" text so you know. [The Send switches](#)
3. **A past customer has a new claim.** Start a new signup with your signup link; a new claim gets its own contact profile and RO number. If they still have the same phone number, tell us the same day so texts land on the new case. [Your three links](#)
4. **Can I see closed cases?** Yes: in the left menu, click **RO Hub**, the **RO List** tab, the **CLOSED** pill. In **Contacts**, search by name as always. [Find a case](#)

Money

1. **Can I change the fee for one case?** Yes, in **Fee amount** (folder **CASE**) before the customer signs. If they already signed, send a custom invoice; the task tells you. [The agreement and the fee](#)
2. **The customer paid me directly.** Set **Fee paid** (folder **CASE**) to how they paid (Venmo, Check, Cash), then record the payment on the Square invoice so it stops chasing. [Invoices and payments](#)
3. **Who has not paid?** In the left menu, click **Contacts**; along the top of the list, click the saved list **Money out**. [Invoices and payments](#)

4. **Can I refund a payment?** Yes, from the paid invoice in **Invoices**; the steps are in Invoices and payments. The refund goes back the way it was paid. [Invoices and payments](#)

Calendar and booking

1. **What time zone are appointments in?** Eastern. The booking page says so to the customer, and your calendar shows Eastern. [Calendar](#)
2. **The customer wants to change the time.** They reply to our text and you get the task **Customer wants a date or an update**; then change it yourself: contact profile, far right edge, the **Appointments** icon, the three dots on the appointment, **Edit**, pick the new **Date** and **Slot**, **Save**. [Post-repair inspection: booking](#)
3. **Can I book for a customer who has no case?** Not usefully: a booking with no case gives you the "booked but has no case" alert. Send them the signup link first. [A text from someone with no case](#)
4. **Why is the blue + New button in Calendars crossed out in this guide?** Booking there by typing a name makes a second customer with no case, and you get the alert "booked an inspection but has no appraisal case". Book from the customer's contact profile instead. [Calendar](#)

Sarah

1. **Can I turn Sarah off for one customer?** Yes, through us: her switch is not on your screen. Tell us the RO number. [Sarah](#)
2. **Sarah went quiet on a customer.** She handed the conversation to you (eight hours of quiet) or the case is closed. Answer yourself. [Sarah](#)
3. **Can Sarah be taught something new?** Yes. Send us the question the customer asked and the answer you want her to give; we add it. [Getting help](#)
4. **Does Sarah ever quote a figure?** Never: not the range, the offer, the award or the fee. She says where the case stands and what is needed. [Sarah](#)

Support and changes

1. **How do I reach a person?** In the left menu, click **Support**; under the chat, click the orange **Support Ticket** button, fill the form, send. Within minutes you get an email saying we are on it; we answer by email or call. [Getting help](#)
2. **What should I put in a ticket?** The RO number, what you did and when, what you expected, and a screenshot of the newest note on the contact profile. [Getting help](#)
3. **Something went to the wrong customer or insurer.** That is a ticket, now, with the RO number; do not try to fix it by resending. [Getting help](#)

4. **I have an idea, or a step does not fit how I work.** Click the orange **Feedback** button under the support chat and describe it. We change the step on our side so it holds for every case after; please do not work around it. [Getting help](#)
5. **Can the support chat see my cases?** No. It knows this guide, not your data. For a specific case, give it the RO number and what you see, and it tells you where to look; if something has actually gone wrong, open a ticket.
6. **Can the wording of a text or email to customers be changed?** Yes, by us. Send us the message as it reads now (a screenshot or the note that names it) and the wording you want. [Every text and email the customer receives](#)
7. **Can a timer be changed?** Yes, by us. Tell us which one (they are listed in Every timer) and the new number of days. [Every timer](#)
8. **Can a new person be added to the office?** Yes: tell us their name, email and mobile number, and which tasks and alerts should go to them. They get a sign-in email from us.
9. **How do updates reach me?** Changes to pdrOS appear on their own the next time the page loads; nothing to install on the computer. The phone app updates through the App Store or Google Play like any other app.
10. **Who else can see my cases?** You, Sharon, and the pdrOS team when you ask us for help. No customer sees another customer's anything.

How pdrOS thinks

1. **Why does every field do something?** Because the field is the instruction. There is no separate "go" button: typing the real value when it is true is what moves the case, sends the email and starts the clock. Typing a guess starts real work on a guess. [The one rule](#)
2. **Why are the tasks so wordy?** So you never have to look anything up: the task carries the case data and the exact clicks. Read **DO THIS** and skip the rest when you know it. [The Tasks page](#)
3. **Why not just do it my way and skip the step?** Because the next step is waiting for that field. A step skipped is a chase that never fires, an email that never goes, or a close that never happens. If a step is wrong for how you work, tell us and we change the step. [The habits](#)
4. **Why are the texts to customers signed Sarah and the emails to insurers signed John?** Customers get an assistant who answers at any hour; insurers and other appraisers get the appraiser of record. [Sarah](#)
5. **Something looks broken but I am not sure.** Read the newest note on the contact profile first; it usually says what pdrOS just did. Then reload the page. If it still looks wrong, send us the RO number and the note. [When something goes wrong](#)

Other words for this: sign in = log in, login; password = passcode; alert = notification, ping; DND = do not disturb, opted out, unsubscribed; ticket = support request, help request; export = download the list, spreadsheet, Excel; reload = refresh; phone app = mobile app, LeadConnector app.