



Centriq Onboarding - Managing Properties

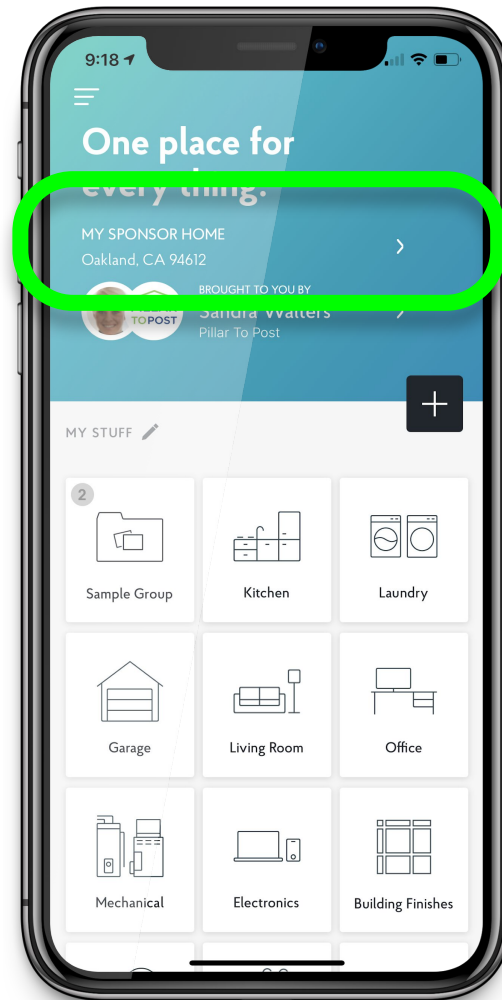


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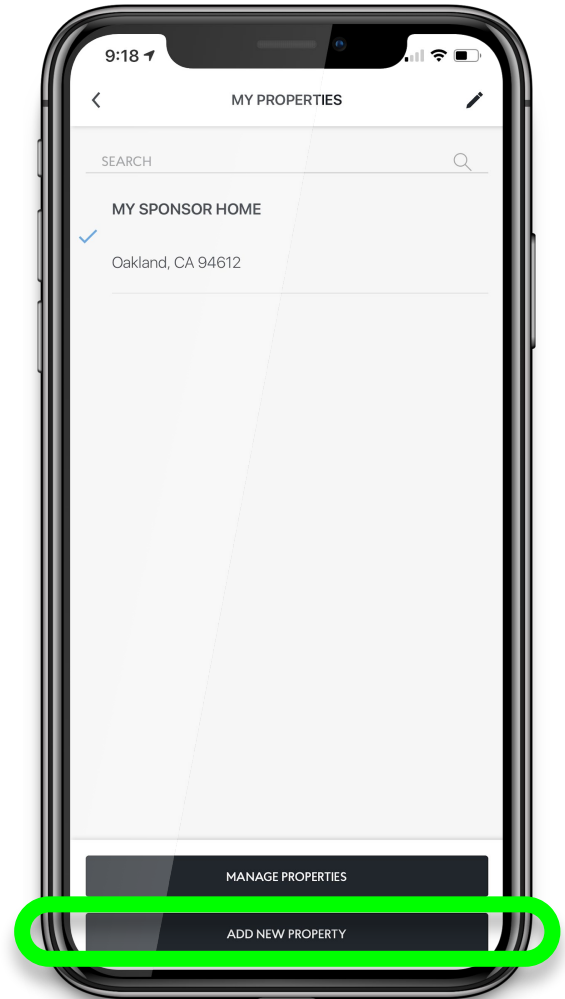
- [Add a Property](#)
- [Transfer a Property](#) (Trigger the Report)
- [Delete a Property](#)
- [Cancel a Transfer](#) (Withdraw Transfer)

Adding a property / address

Get to the list of properties by picking the property at the top of the screen.

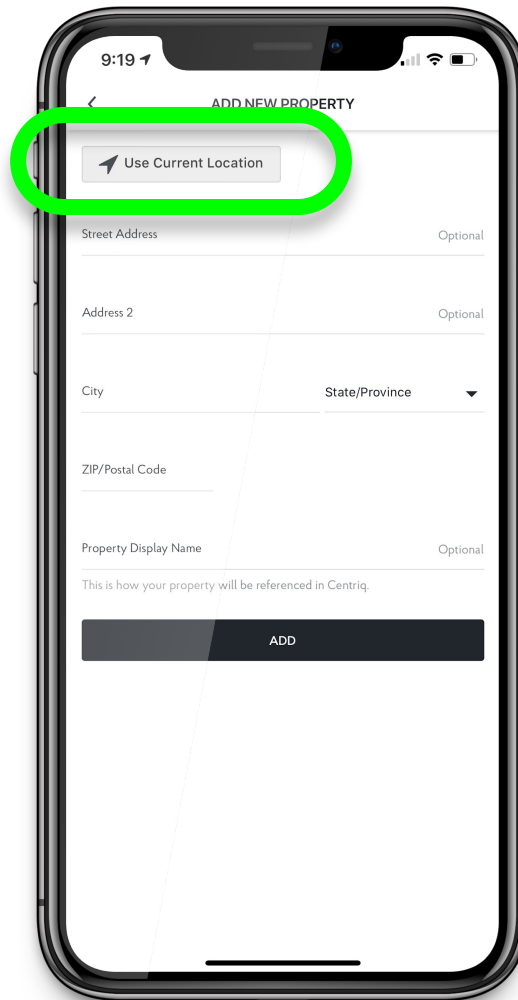


Pick **Add New Property**

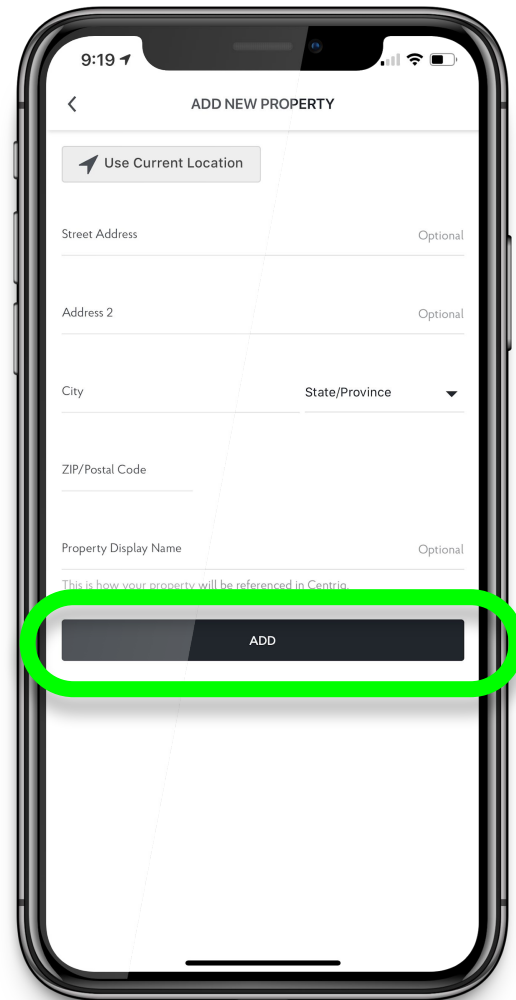


Pick **Use Current Location** or type in the address

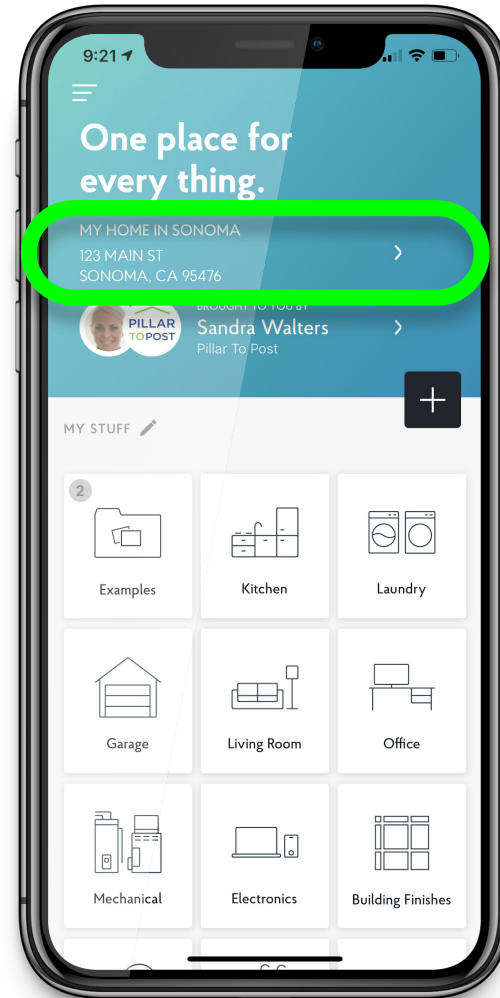
Centriq must have permission to access your location.
Go to the device Settings app > Centriq



Pick the **Add** button

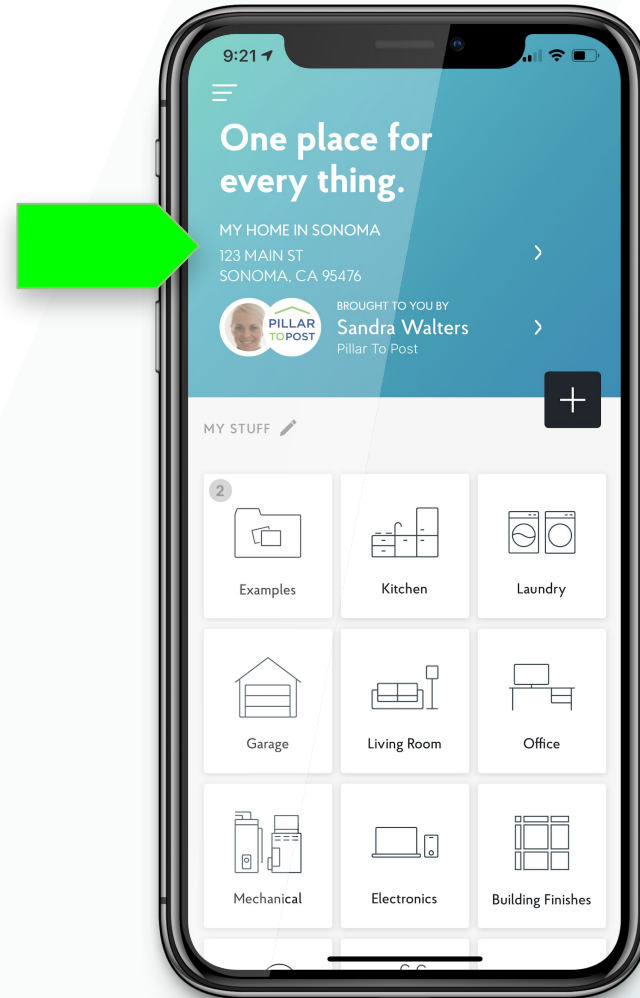


Now you are in the new property

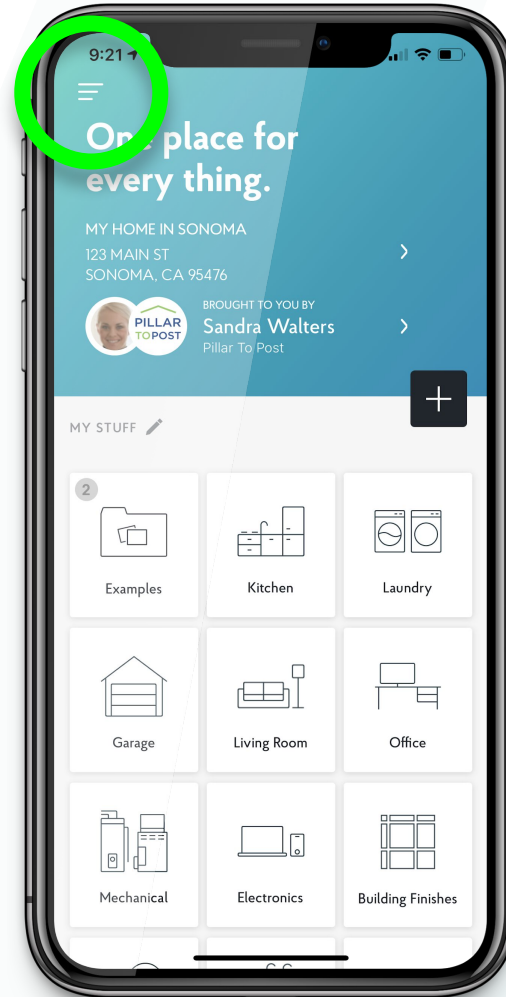


Transferring a property
(trigger the property report)

Verify that you are
looking at the correct
property.

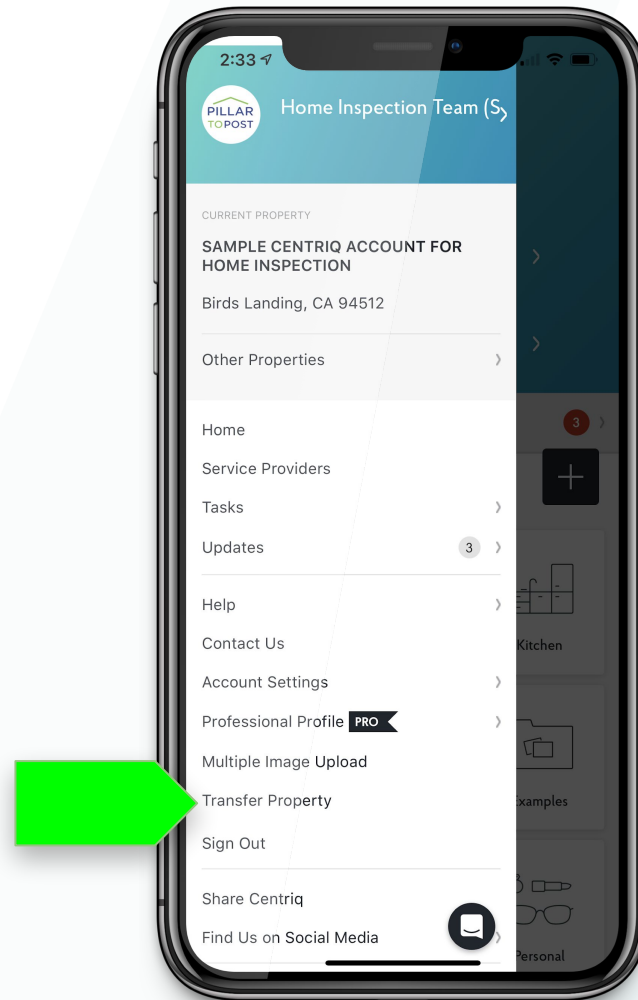


Select the menu icon

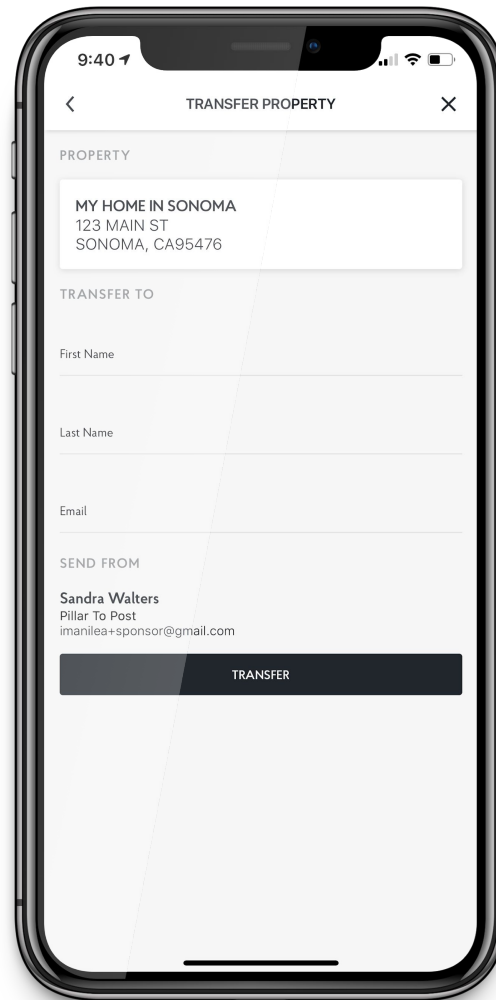


Select **Transfer Property**

Mobile app only!



Fill out the name and email of your client and pick **Transfer**

A smartphone screen displaying a mobile application interface for transferring property. The screen is titled "TRANSFER PROPERTY" at the top. Below the title, there is a section labeled "PROPERTY" with a text box containing "MY HOME IN SONOMA", "123 MAIN ST", and "SONOMA, CA95476". Below this, there is a section labeled "TRANSFER TO" with three input fields: "First Name", "Last Name", and "Email". Below these fields, there is a section labeled "SEND FROM" with the text "Sandra Walters", "Pillar To Post", and "imanileea+sponsor@gmail.com". At the bottom of the form, there is a dark blue button labeled "TRANSFER".

9:40

TRANSFER PROPERTY

PROPERTY

MY HOME IN SONOMA
123 MAIN ST
SONOMA, CA95476

TRANSFER TO

First Name

Last Name

Email

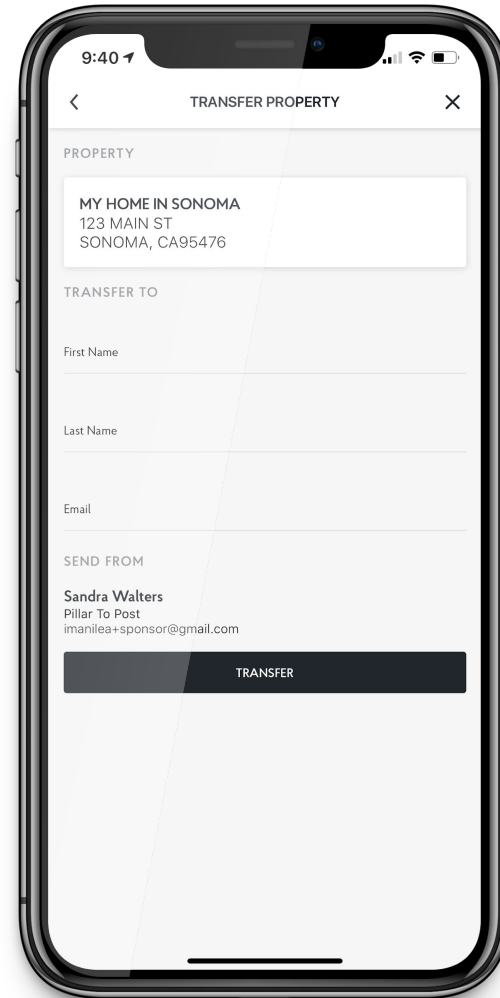
SEND FROM

Sandra Walters
Pillar To Post
imanileea+sponsor@gmail.com

TRANSFER

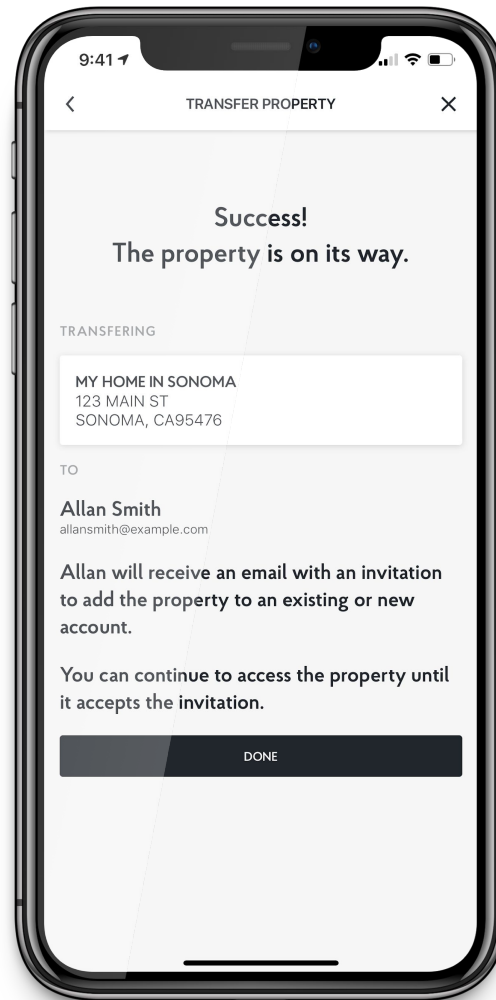
There is currently no place to add the realtor contact email

When you receive your recall report confirmation email, you can forward it to the realtor.

A screenshot of a mobile application interface titled 'TRANSFER PROPERTY'. The screen is divided into three main sections. The first section, 'PROPERTY', contains a text box with the address: 'MY HOME IN SONOMA', '123 MAIN ST', 'SONOMA, CA95476'. The second section, 'TRANSFER TO', contains three input fields labeled 'First Name', 'Last Name', and 'Email'. The third section, 'SEND FROM', contains the text 'Sandra Walters', 'Pillar To Post', and 'imanileea+sponsor@gmail.com'. At the bottom of the form is a dark blue button labeled 'TRANSFER'. The top of the screen shows a status bar with the time '9:40' and various icons.

Done! On to the next home.

*The transfer steps can also be completed in the web app.





Client receives TWO emails:

1. **Accept** the Centriq app with the home inventory



BROUGHT TO YOU BY
Spector Team
Pillar to Post

Hi ME,

Spector Team sent you the digital manual for your home.

Property Address:
Palo Alto, CA 94303

Sent to you by:
Spector Team
Pillar to Post
<https://pillartopost.com/>
Email: imanilea+hitest@example.com

ACCEPT TRANSFER

What to expect

Are you waiting for a property recall report? No worries! You will receive a link to your report in a separate email. The report will also be attached in the app once it is ready.

Centriq is the one app that helps you get the most out of your home and the things in it. Think of it as the Ultimate User Guide, specifically for your home.


You'll get:

- Manuals for all your appliances
- How-to videos for maintenance tasks
- Create your own maintenance tasks
- Supplies and accessories for the things you're sure to need. You can even order them straight from Amazon.

[Click here to see all the great features in Centriq.](#)

Client receives TWO emails:

2. **Download** the Property Recall Report

 BROUGHT TO YOU BY
Spector Team
Pillar to Post

Hi Imani,

Spector Team sent you a report for your property in Centriq.

Property Address:
123 Second Street
Manhattan Beach, CA 90266

Sent to you by:
Spector Team
Pillar to Post
<https://pillartopost.com/>
Email: imanilea+hitest@example.com

PROPERTY REPORT

If you need help with Centriq, just reply to this email to reach our support team. Or [contact us here](#).

No items = No report

The property that you transfer has to have items in it to trigger a property report.

You are billed for reports, not for transfers.



Since there's no point to our sending a blank property report, the report is not triggered if the transferred property doesn't contain any items.

You can still transfer an empty property to anyone you'd like just to share the app with them.



BROUGHT TO YOU BY
Spector Team
Pillar to Post

Hi ME,

Spector Team sent you the digital manual for your home.

Property Address:
Palo Alto, CA 94303

Sent to you by:
Spector Team
Pillar to Post
<https://pillartopost.com/>
Email: imanilea+hitest@example.com

ACCEPT TRANSFER

What to expect

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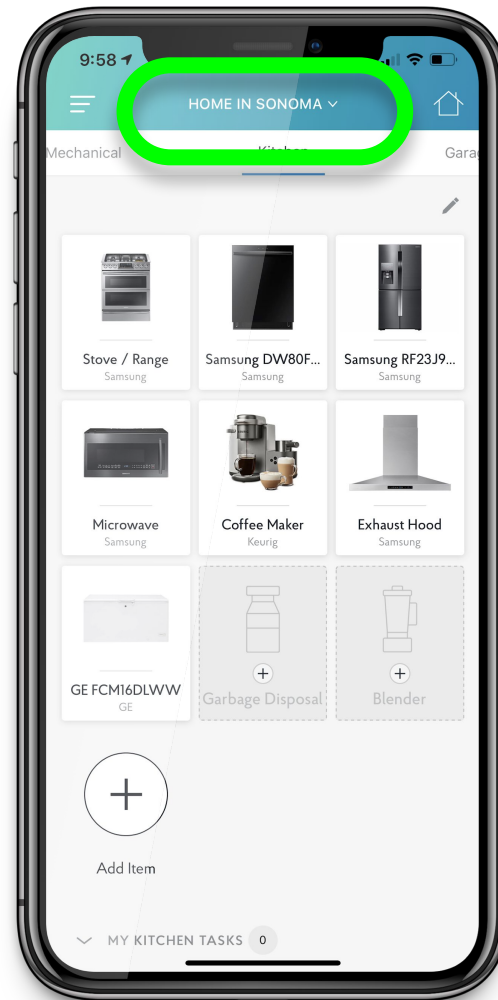
You'll get:

- Manuals for all your appliances
- How-to videos for maintenance tasks
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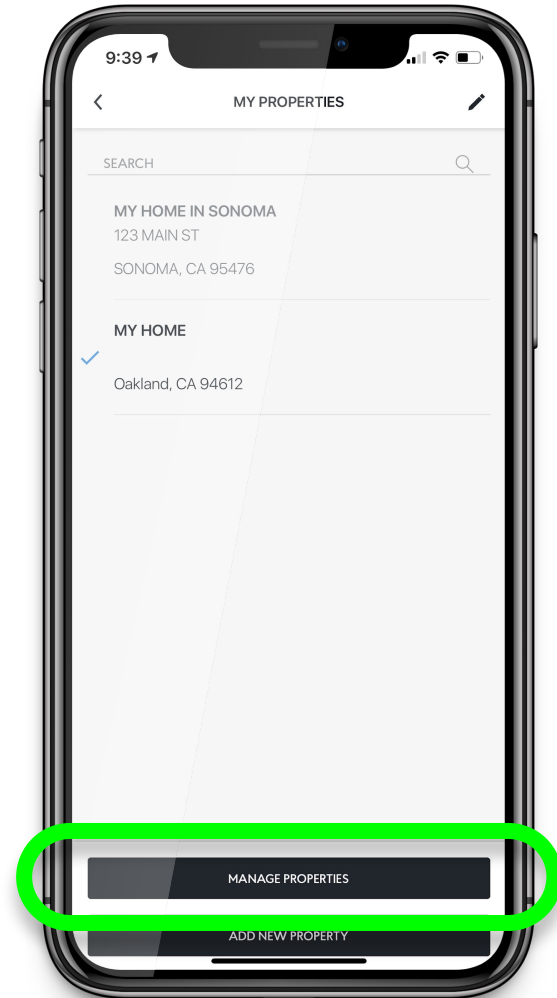
[Click here to see all the great features in Centriq.](#)

Transferring a property using the web app

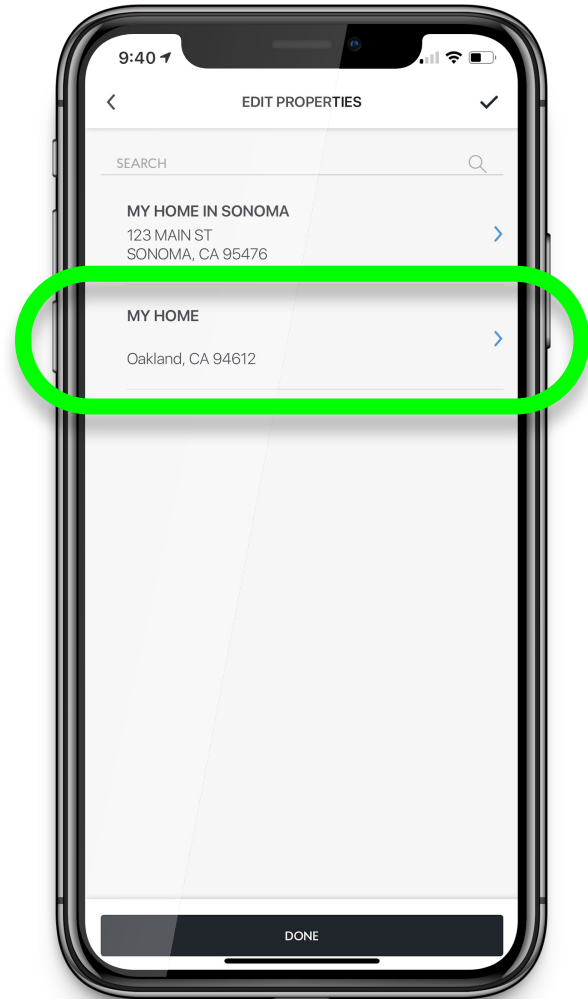
Always get back to the properties list by picking the property at the top of any screen.



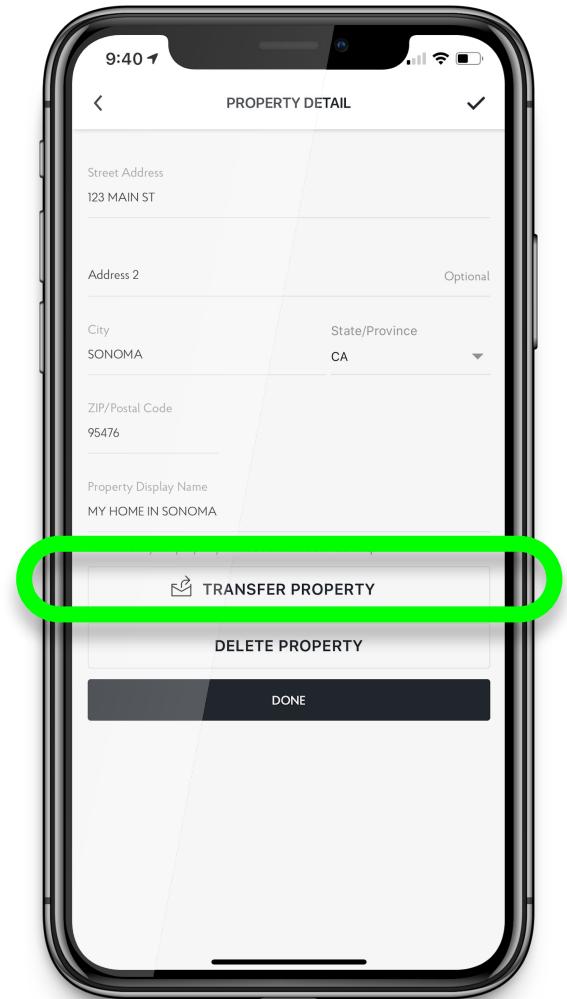
Pick **Manage Properties**



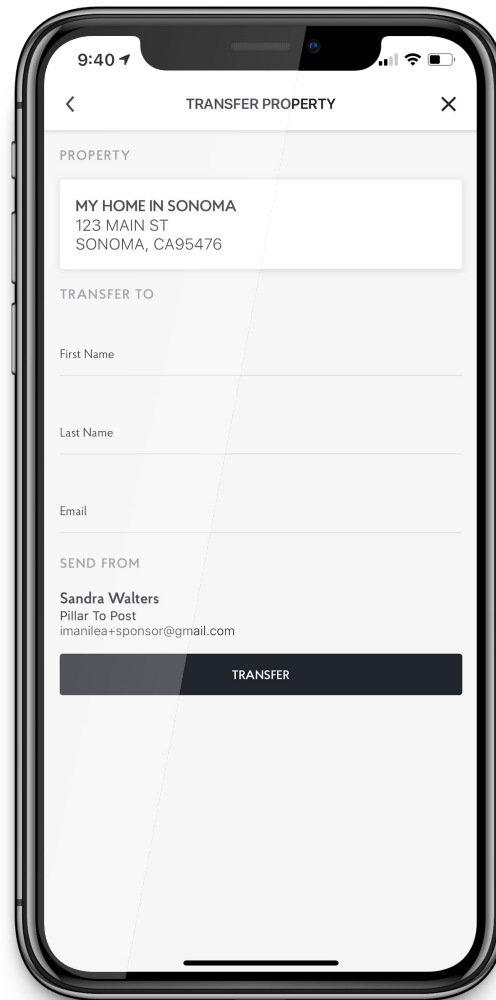
Pick the property you were working
on



Pick **Transfer Property**

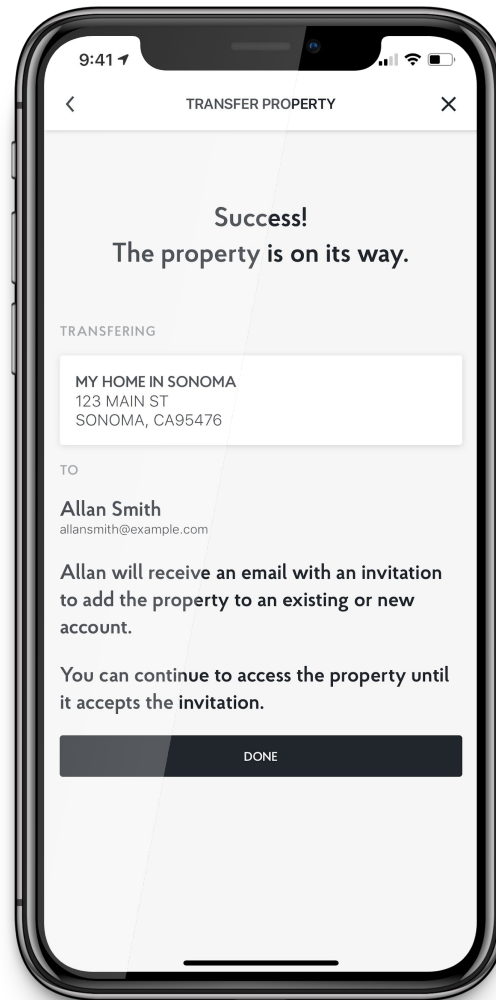


Fill out the name and email of your client and pick **Transfer**

A smartphone screen displaying a 'TRANSFER PROPERTY' form. The form is titled 'TRANSFER PROPERTY' at the top with a back arrow and a close 'X' icon. It contains several sections: 'PROPERTY' with a text box containing 'MY HOME IN SONOMA', '123 MAIN ST', and 'SONOMA, CA95476'; 'TRANSFER TO' with input fields for 'First Name', 'Last Name', and 'Email'; and 'SEND FROM' with the text 'Sandra Walters', 'Pillar To Post', and 'imanileea+sponsor@gmail.com'. At the bottom is a dark button labeled 'TRANSFER'. The phone's status bar at the top shows the time as 9:40 and various icons for signal, Wi-Fi, and battery.

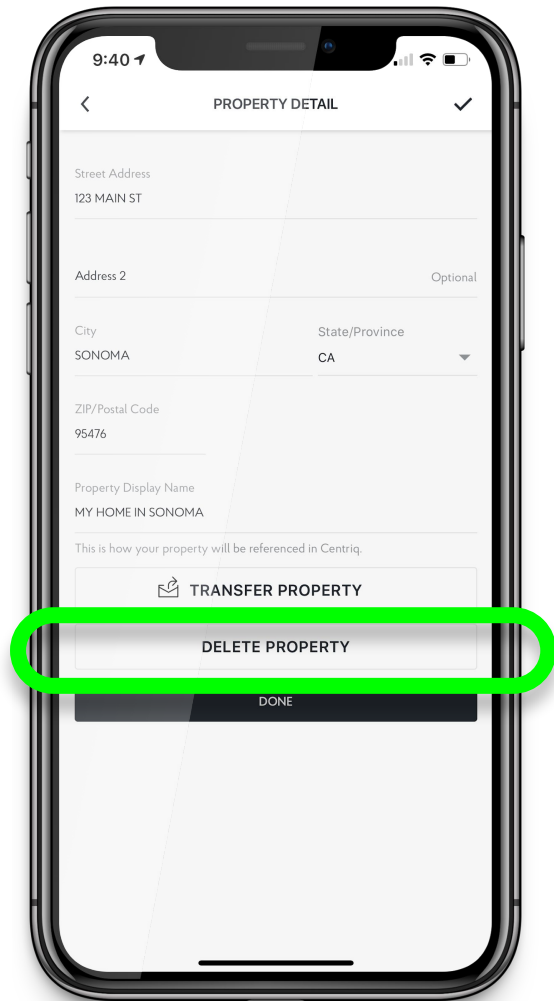
Done! On to the next home.

*The transfer steps can also be completed in the web app.



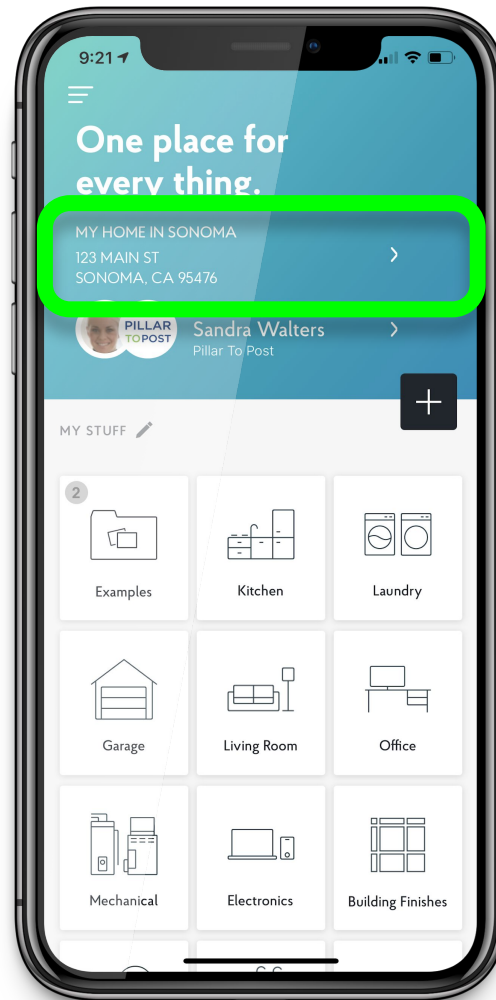
Delete a Property

If you ever need to delete a property from your account, you can do so by going back to the **Property Detail** and picking **Delete Property**

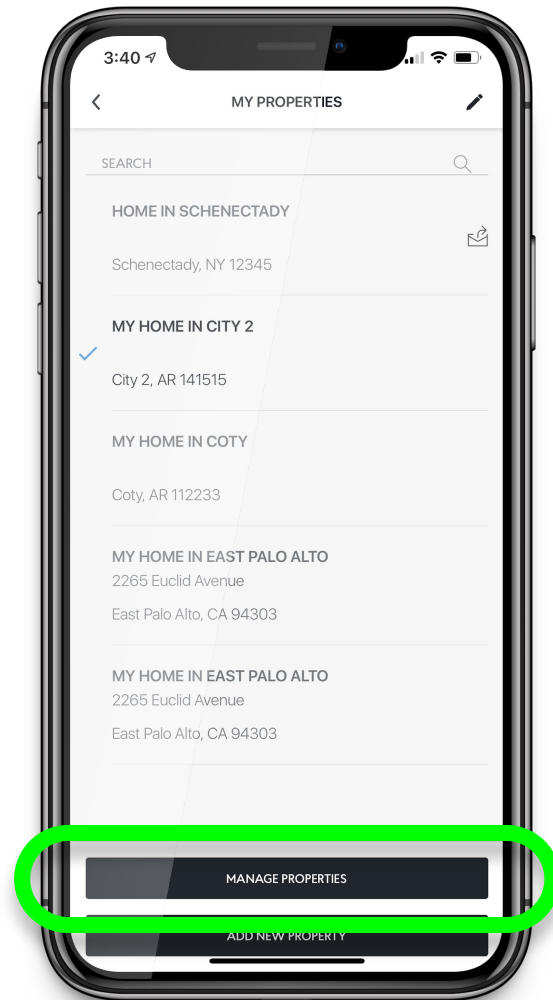


Cancel a transfer

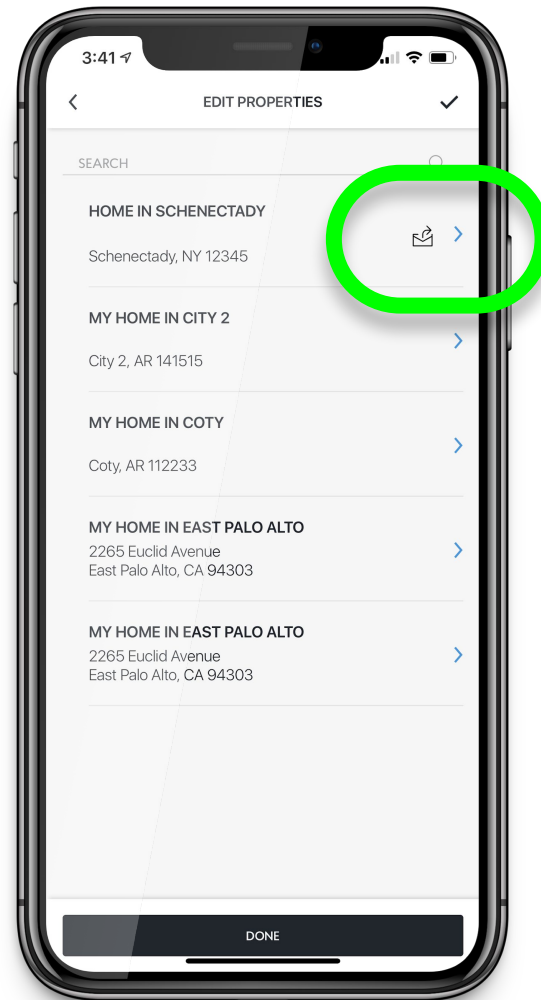
Always get back to the properties list by picking the property at the top of any screen.



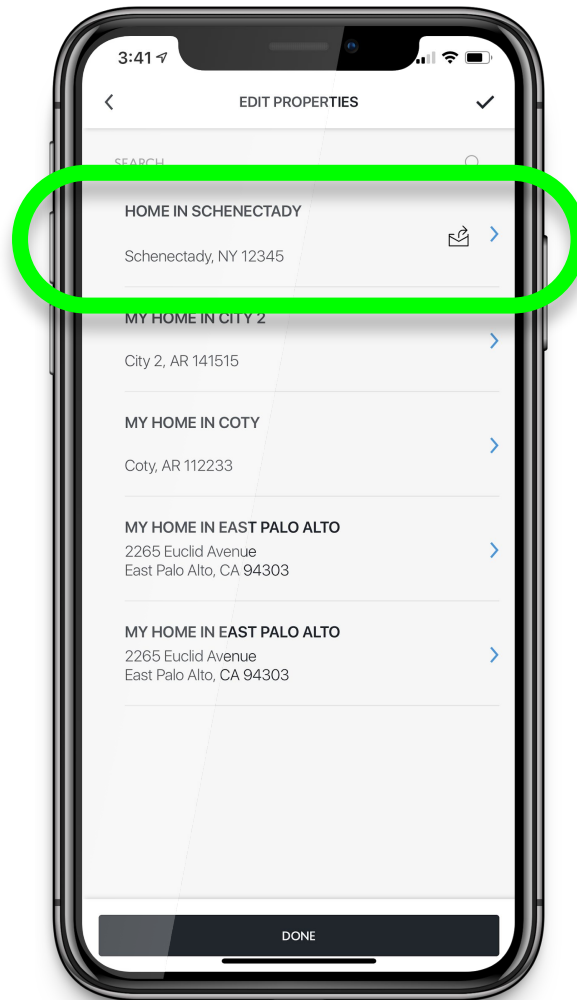
Pick **Manage Properties**



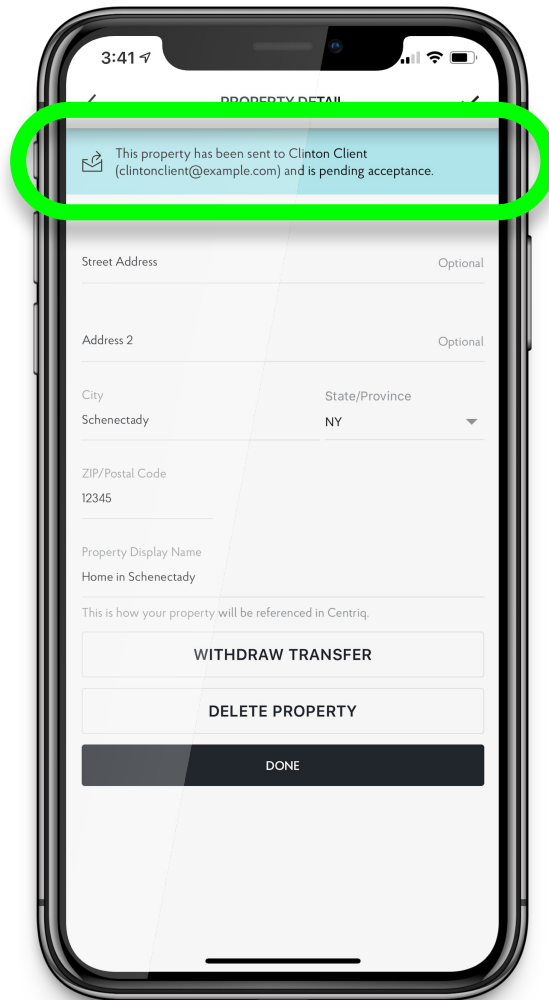
Notice the “was transferred” icon



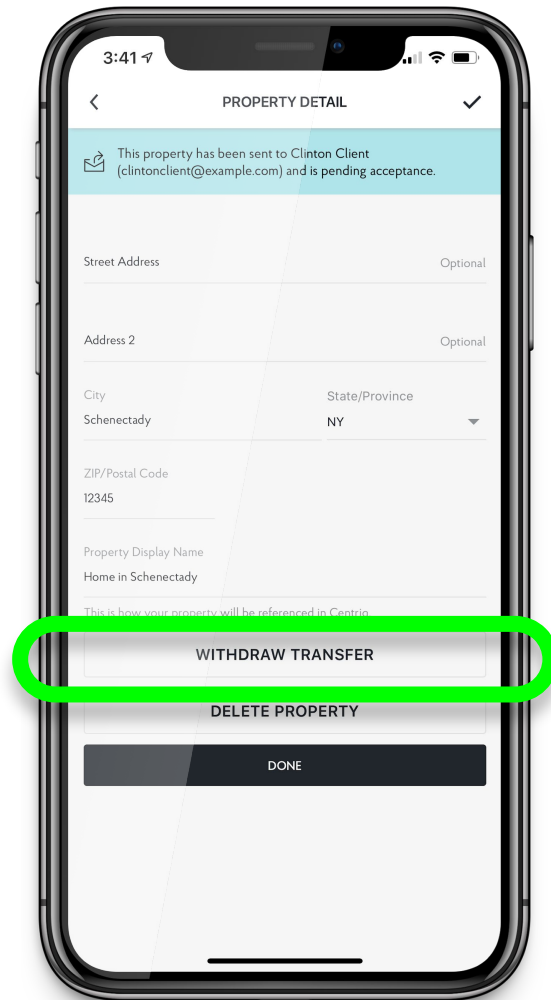
Pick the property that is transferred



Notice the confirmation that the property is transferred

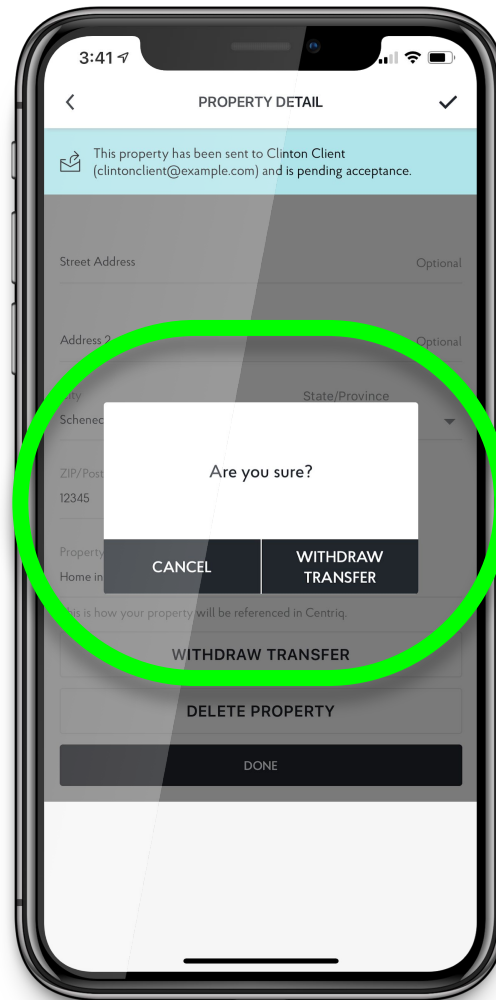


Pick **Withdraw Transfer**



Confirm and the property can no longer be claimed by the client

Repeat the transfer process to resend it to the client



Access the full tutorial series here:

[Centriq Home Inspector Tutorial Series](#)



Thank you!!!

Contact Us any time
(415) 967-3993

support@mycentriq.com