The QuikPro Equipment Inspection is the verification of a business and equipment that is either being leased or purchased. The inspection is performed as part of the lender’s required due diligence in assessing the potential risk in financing the borrower, and may be performed either pre- or post-funding. The make, model, and serial number (S/N) of each equipment item are viewed and verified, or obtained if not provided. An overall assessment of the business and equipment is documented in the report.

**ADDITIONAL DOCUMENTS**

(All listed documents are available for download from the Forms page of the Quiktrak web site)

Depending on the format used, the following documents are also needed:

- **Inspections conducted on PDA**
  - QuikPro Equipment Inspection—Revoquest PDA Quik-Reference
  - QuikPro Equipment Inspection Report Form (extra form)

- **Inspections conducted on Paper**
  - QuikPro Equipment Inspection Report Form (extra form)
  - IS-900 Exception Comment Sheet (if additional comment space is needed)
  - IS-901 Tagging Inventory Form (if tagging with numbered tags is required)

**INSPECTION REQUIREMENTS**

(Detailed explanations of these options are provided in the Inspection Services General Guidelines.)

Refer to the Inspection Detail for the contract to determine which of the following options apply:

- Schedule Appointment or Go Out Unannounced
- Photographs
- View Equipment in Operation
- Tagging
- Phone Clearance (In Person or Voicemail Okay)
- Priority Report
- Client & Special Instructions

**PHOTO REQUIREMENTS**

(Additional information regarding photo requirements is provided in the Inspection Services General Guidelines.)

If photos have been requested, the following photos are required:

**The Business**

- Exterior of the business/building (1-2 photos)
- Signage for the business (1-2 photos)
- Interior of the business (2-3 photos)*

*Photos of the interior of the business/building are not required if the inspection occurs at a location that is NOT the lessee’s (i.e. job site or vendor location), unless specifically requested in the Special Instructions.

**The Equipment**

- Equipment lists of 1-5 units:
  - 2-3 photos of each piece of equipment from different angles
  - 1 photo of each serial number plate
- Equipment lists of greater than 5 units:
  - 1 photo of each piece of equipment
  - All big ticket and rolling stock items—1 photo of each serial number plate

IN ADDITION TO THE ABOVE EQUIPMENT PHOTOS, THE FOLLOWING IS REQUIRED REGARDLESS OF THE SIZE OF THE EQUIPMENT LIST:

- If any equipment is damaged, take additional close-up photos of the damage. The damage must also be described in the report.
- If a serial number was obtained during the inspection, or there was a serial number discrepancy, ALWAYS take a photo of that serial number plate.

**IMPORTANT:** If unable to provide any or all of the required photos, an explanation must be given in the report.
Answering the Inspection Questions

This section explains how to answer the questions that appear on the inspection report. Most questions are in a multiple-choice format, others allow multiple selections to be made, and some require short answer responses. Be aware that certain responses require additional information or explanations.

Make sure that all questions on the report have been answered and explanations have been provided when necessary. If a question does not apply to the inspection you are doing, simply choose the most appropriate response available, such as “N/A” or “Other.” Never leave a question unanswered.

PDA Format: When entering responses/comments, please use proper capitalization.

Multiple Locations. If the inspection requires travel to more than one location, a separate set of inspection questions must be answered for EACH LOCATION.

PDA Format: Set the location on the PDA to the correct address before you begin the inspection.

⇒ If you travel to a secondary location, change the location on the PDA to access the inspection questions associated with that address.
⇒ If you have been authorized to travel to an additional location NOT listed in the Locations screen, the report questions for that location are to be documented on paper. Use the QuikPro Equipment Inspection Report (extra form).

Paper Format: The report form will include a set of inspection questions for each listed location.

⇒ Fill out the correct set of questions for each location (the address appears at the top of each page).
⇒ If you have been authorized to travel to an additional location NOT listed on the original report, the report questions for that location are to be documented on the QuikPro Equipment Inspection Report (extra form).

Location Type. The specific inspection questions that appear on each report may vary depending on the location type. The selection made by the client determines which questions appear on the report:

⇒ Lessee—means the inspection location is the lessee’s/borrower’s actual business location.
⇒ Job Site—means the inspection location is where the equipment is being used, but it is not the actual business location.
⇒ Vendor Site—means the inspection location is the vendor’s/seller’s location. The equipment has not yet been delivered to the lessee/borrower.

The report questions are re-numbered depending on how many questions are included on the report. For this reason, the questions are not numbered in this document but are listed in the order that they would appear on the report. (The questions will always appear in the same order.)

Denotes a question that appears if the location type is Vendor Site. (These are the only questions that are applicable when inspecting a Vendor Site.)

Denotes a question that appears if the location type is Job Site. (These are the only questions that are applicable when inspecting a Job Site.)

PRE-INSPECTION

Confirm the phone number for the business. Provide the correct number, if necessary.
If the contact number that was provided by the client is a cell number or other type of non-business contact number:
• Respond “No” and obtain the phone number for the business location.

If the inspection was unannounced:
• Respond “N/A.”

Confirm the address of the inspection location.
If any part of the provided address is incomplete or inaccurate:
• Respond “Yes, however address information obtained” and provide the complete address, including: street address, suite #, city, state, and zip code.

If you went to a completely different location:
• Respond “No,” and provide the complete address of that location.
Indicate if the contact confirmed during scheduling that all the equipment would be in use/running for the inspection.

If the inspection requirements include “View Equipment in Operation”:
- Respond “Yes” if the contact in fact confirmed during the scheduling call that ALL the equipment could be viewed in use/running during the inspection.
  
  **REMINDER:** If the contact states that 1 or more items cannot be viewed in operation, do not schedule an appointment. Contact Quiktrak for instructions.
- Respond “No” if the contact did not confirm that ALL the equipment would be in use/running, and explain the situation. For example: the inspection is Unannounced.

If the inspection requirements DO NOT include “View Equipment in Operation”:
- Respond “N/A - Not Requested.”
  
  **REMINDER:** You still need to attempt to view equipment in operation regardless of whether “View Equipment in Operation” was listed as a requirement.

INSPECTION OBSERVATIONS

Identify the location type.
- Respond “Lessee” if it is the location where the business is actually operating.
- Respond “Job Site” if it is simply a location where equipment is being used temporarily; it is not the actual business location for the lessee.
- Respond “Vendor” if it is the location of the vendor supplying the equipment (meaning the inspection is taking place prior to the lessee taking delivery of the equipment).
- Respond “Other” if none of the above options apply. Provide an explanation.

Confirm whether the business name viewed at the site exactly matches the Job Name. Any difference in name must be noted. This includes typos, misspellings and DBAs (Doing Business As), but does NOT include designations such as “Inc.”, “Co.” or “LLC” (which are commonly omitted from business signage).
- Respond “Yes” if the name viewed on the sign exactly matches.
- Respond “No signage was viewed” if there was no signage at the site displaying a name for the business.
- Respond “No, business name was different” if the name does NOT exactly match. Record the actual name that you viewed. For example: Job Name is “Universal Asset Management” but the sign shows “Universal Investments.”
- Respond “Occupied by different tenant” if there is a different, unrelated business at that address. Provide the name of the current tenant.

Identify the type of signage viewed at the location. Mark all that apply. If none of the listed options apply, respond “Other” and provide an explanation.

Describe the neighborhood where the lessee is located. Mark all that apply. If you respond “Other,” provide an explanation/description.

Identify the building type.

Explanation of terms:
- **Industrial complex**—a group of office, manufacturing or storage buildings located in a close vicinity.
- **Private Residence**—the borrower operates the business in their residence, but there is no office or specific area used for the operation of the business.
- **Home-based business**—the borrower operates the business in their residence and has an area of the home set aside specifically for the use/operation of the business (e.g. there is a business office set up in the residence).
- **Freestanding building**—a building that is standing alone, not connected to any other structures, and usually with a single tenant.
- **Strip Office Complex**—a strip of professional offices (not retail).
- **Business/Office Park**—a group of commercial/professional office buildings located in a close vicinity.
- **Retail Strip Mall**—a strip of retail stores.
- **Warehouse**—a commercial building used for storage of goods.
- **Commercial Office Building**—a multi-story building occupied by various professional offices.
- **Other**—none of the other choices accurately identifies the building type. Provide an explanation/description.
Describe the appearance of the Lessee’s business. Mark all that apply. Some responses require an explanation/description.

Indicate the number of employees viewed during the inspection (including the contact). This is simply your observation; you are not asking the contact how many people they employ.

Confirm if you saw any signage indicating the business has changed or is in transition. Common examples are listed (“grand opening,” “going out of business,” “under new management,” etc.), but any kind of change can impact the lender’s assessment of the business. If you respond “Other,” record exactly what the sign reads.

Confirm whether equipment was tagged. (Refer to the Inspection Services General Guidelines for detailed instructions on tagging.)

If tagging was requested:
- Respond “Yes” if every item was tagged by you.
- Respond “No—Untagged units noted in Unit Notes” if any item on the equipment list was NOT tagged. Record a comment in the Unit Note of each unit that was not tagged. (Paper Format: record this comment on the equipment list.)

REMINDER: If tags are numbered, record the tag number in the applicable field of the IO (Information Obtained) exception record for each unit that is tagged. (Paper Format: record the tag number on the IS-901 Tagging Inventory Form.)

If tagging was NOT requested:
- Respond “N/A.”

Confirm whether a check was exchanged for a title. Special Instructions may include a request to exchange a check for a title when the inspection is completed at the vendor’s location. The client will send the check directly to you prior to the inspection. Upon completion of the inspection, you will provide the vendor with the check and collect the original title(s) for the equipment. Original titles are to be forwarded to the client immediately following the inspection. If the client did not provide a pre-addressed return envelope in the package you received from them, ask them for their address and carrier information (i.e., UPS or FedEx account #) during phone clearance.
- If you respond “Yes,” provide the tracking number and carrier (i.e. UPS, FedEx, etc.).
- If you respond “No,” explain why the transaction did not occur.
- If the service was not requested by the client, respond “N/A, Not Requested.”

Confirm whether equipment was affixed to the property. For example, equipment is bolted to the floor, nailed to a wall, embedded in concrete, etc.

If you respond “Yes—affixed units in Unit Notes or Comments,” record a comment in the Unit Note of each affixed unit and briefly describe how they are attached to the property. (Paper Format: record this on the equipment list.)

CONTACT INTERVIEW

Identify your primary contact. Provide the first and last name and the title of the individual(s) who assisted you during the inspection.

This report is a legal document; therefore, it is important to record who assisted you or provided you with any information. This includes answering the interview questions and identifying the equipment. Our client may want to discuss issues or ask questions of the individuals with whom you met.

Interview the lessee contact in order to obtain the requested information in this section. If your contact is unable to answer all the questions, ask if there is someone else you can speak to who can. Make contact by phone if necessary. Please be sure to also record that additional contact’s first and last name and title, as well as indicate if you spoke to them by phone only.

- What is the age of the business? (in years and months)
- How long have they been at this location? (in years and months)
- Does the business run under any other names? (if “yes,” provide the name; if “other,” provide explanation)
- Are there any additional locations? (if “yes,” provide addresses; if “other,” provide explanation)
- How many people do they employ?
When was the equipment delivered?*
When was the equipment installed?*
What is the age of the equipment?*

Is the contact satisfied with the equipment?  (if "no," provide explanation)

If the response to any of these questions is "unknown," please explain why.

*Try to obtain specific dates whenever possible. If equipment age, delivery dates, or installation dates vary for the equipment, please explain. Record the varying dates as they pertain to each equipment item.

AFFIRMATIONS

The “Affirmations” help to identify whether the business appears to be legitimate. Remember that you are the client’s eyes and ears in the field and they rely on you to pay attention and make observations for them. Provide explanations for your answers when necessary.

If the inspection did NOT take place at the lessee’s location, respond “Uncertain” to these questions.

Do the equipment and location make sense?  If not, explain why.  Are you inspecting twenty computers at a laundromat?  Or a chiropractic clinic in the middle of an industrial complex?

Does the company share space with any other businesses?  Identifying businesses that are “sharing space” can sometimes be confusing. Sharing space means 2 or more companies are located in the same address, usually sharing the same entrance and with access to each other’s equipment/work areas. Remember to identify the name of the other business and explain its relationship to the business being inspected.

Indications of sharing space would include:

- Two or more businesses listed on the business sign, building, door, window, and/or business card.
- Sign on the door shows one company name, but the business card shows a different name.
- When the receptionist answers the phone, she/he mentions another or additional business name.

Examples of businesses that share space:

- An eyeglass retailer with an independent optometrist operating an office inside the store.
- A supermarket with a bank branch located inside the store.
- A gas station/mini mart with a fast-food franchise located inside the mini mart.

Do you think this business is not what it reports to be?  In other words, does the business appear to be misrepresenting itself?  When answering this question, be careful to provide factual information only—what you saw and/or heard while at the site. Do not make conclusions or assertions that the business is fraudulent; it will be up to the client to draw their own conclusions based on the information provided in your report.

Examples of questionable situations:

- You are inspecting a restaurant that can accommodate 100+ customers.  You are there during normal business hours, but there are no customers, no employees seen other than the lessee contact, and the contact claims they’ve been in business at the location for 2 years.
- You are inspecting a convenience store, but you find that their back storage room is full of boxes of new home electronics (such as TVs, DVD players and stereos).

PHOTOGRAPHS

Confirm if you took photographs.  If photographs were requested but you did not take any, respond “No” and explain why the photos were not taken.

* * * * * * *
Verifying the Equipment

This section explains the requirements for verifying the equipment items, as well as detailed instructions on how to document your verification on the Equipment (Audit) List.

EVERY ITEM ON THE EQUIPMENT LIST MUST BE ACCOUNTED FOR DURING THE INSPECTION.

What aspects of the equipment are being inspected/verified?

The inspection of the equipment will address the following details:

- Did you see the item? If not, why?
  - If you saw the item:
    - Did you verify the provided make, model and serial number?
    - If not provided on the equipment list, did you obtain the make/model/serial number?
    - Is it Rolling Stock?
    - (If requested) Did you tag it? Are the tags numbered?
    - Did you view it in operation?
    - What is the condition?
    - Did you view the manufacturer’s serial number plate/sticker on the equipment?

How is this information documented on the Equipment (Audit) List?

**PDA FORMAT:**

1) If you personally view the item, the status of the unit is marked either Found or with the IO-Information Obtained exception code (refer to status definitions). Also select the applicable Operational, Condition and S/N Viewed codes from the 3 available Audit List Dropdown boxes, and enter Hours if applicable.

2) If you do NOT personally view the item, the unit is marked with the appropriate Exception code based on the contact’s explanation. (The Audit List Dropdown boxes are left blank.)

**Multiple Locations.** Set the location on the PDA to the correct address before marking any units Found or with an Exception.

- If you travel to a secondary location, change the location on the PDA before marking any units verified at that site.

- If you have been authorized by Quiktrak to travel to an address that is NOT listed in the Location Legend, list the complete address in the Unit Note for each item viewed at the new location. Also document why the equipment is there and explain the relationship of the location to the provided address.

**Multiple Quantities.** If a line item has a quantity greater than 1, be sure to apply an appropriate status (Found or Exception) for each individual piece of equipment until the line item is ‘complete’ (i.e., the total quantity of items has been accounted for).

Refer to the Revoquest PDA Quik-Reference sheet for additional PDA information and instructions.

**PAPER FORMAT:**

1) If you personally view the item, the status box is marked with either a “✓” or with the IO-Information Obtained exception code (refer to status definitions). Also record the applicable Operational, Condition and S/N Viewed codes in the appropriate columns.

2) If you do NOT personally view the item, mark the status box with the appropriate Exception code based on the contact’s explanation. (The Oper, Cond and S/N Vwd columns are left blank.)

**Multiple Locations.** Indicate where each equipment item was actually viewed by recording the location number under the Loc column (refer to the Location Legend that appears at the end of the Equipment List). If you have been authorized by Quiktrak to travel to an address that is NOT listed in the Location Legend, add the complete address of the site under the Location Legend and assign it a new “location number.” Also document why the equipment is there and explain the relationship of the location to the provided address.

**Multiple Quantities.** If a line item has a quantity greater than 1 and not all of the units were viewed, provide a breakdown of the found and exception quantities with the appropriate required information in the comments. See the example below:

<table>
<thead>
<tr>
<th>Status</th>
<th>Loc</th>
<th>Oper</th>
<th>Cond</th>
<th>S/N Vwd</th>
<th>Qty</th>
<th>Description</th>
<th>Serial No</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>1</td>
<td>I</td>
<td>N</td>
<td>NS</td>
<td>4</td>
<td>Oak desks</td>
<td></td>
</tr>
</tbody>
</table>

RC (1) - desk was damaged during shipment and returned, they are still waiting for the replacement

If you discover a quantity discrepancy (for example, the equipment list indicates 6 computers but the lessee contact shows you 9 and says they are all part of the same lease), cross out the listed quantity and write in the updated quantity. Document an explanation in the comments.
IF THE EQUIPMENT ITEM WAS PERSONALLY VIEWED BY YOU, MARK THE STATUS ACCORDINGLY:

<table>
<thead>
<tr>
<th>STATUS</th>
<th>DEFINITION and REQUIRED INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Found</td>
<td>Unit was personally viewed by you. Make, model and serial number were provided and matched exactly; there are no discrepancies; unit is not rolling stock; and a numbered tag was not affixed to the item. RECORD in the Unit Note:</td>
</tr>
<tr>
<td></td>
<td>- If the unit is affixed to the floor or another part of the property—describe how.</td>
</tr>
<tr>
<td></td>
<td>- If the unit was viewed at a location NOT listed in the Locations screen—provide complete address and explanation for why the unit is there. Also document who authorized the trip to the new site.</td>
</tr>
<tr>
<td></td>
<td>- If tagging was required but the unit was not tagged.</td>
</tr>
<tr>
<td></td>
<td>SELECT the appropriate options from the Audit List dropdowns for Operational status, Condition and S/N Viewed. See codes and definitions below.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IO</th>
<th>Unit was personally viewed by you AND additional required information was obtained/recorded for one or more of the following situations:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(1) Make, model and/or serial number information was not provided but you were able to obtain it during the inspection.</td>
</tr>
<tr>
<td></td>
<td>RECORD the obtained make/model/serial number in the appropriate exception field(s).</td>
</tr>
<tr>
<td></td>
<td>(2) A discrepancy to the make, model, and/or serial number was identified.</td>
</tr>
<tr>
<td></td>
<td>RECORD the correct make/model/serial number in the appropriate exception field(s). This includes if a partial S/N is provided and the full number is viewed on the plate.</td>
</tr>
<tr>
<td></td>
<td>SELECT the option Discrepancy from the subtype dropdown.</td>
</tr>
<tr>
<td></td>
<td>(3) The unit is Rolling Stock (i.e. towable/drivable, equipped with an hour meter or odometer, or has a license plate). Examples include: cars, trucks, trailers, construction/agricultural equipment, etc.</td>
</tr>
<tr>
<td></td>
<td>RECORD the following information:</td>
</tr>
<tr>
<td></td>
<td>► Odometer reading and license plate information in the appropriate exception fields.</td>
</tr>
<tr>
<td></td>
<td>► Hour meter reading in the Hours box located on the Audit List screen. (Paper Format: record this information on the Rolling Stock Addendum page of the report.)</td>
</tr>
<tr>
<td></td>
<td>(4) A numbered tag was applied to the unit.</td>
</tr>
<tr>
<td></td>
<td>RECORD the tag number in the appropriate exception field. (Paper Format: record the tag number on the IS-901 Tagging Inventory Form.)</td>
</tr>
</tbody>
</table>

IN ADDITION TO THE ABOVE, ALSO: |

| RECORD in the Unit Note: |
| - If the unit is affixed to the floor or another part of the property—describe how. |
| - If the unit was viewed at a location NOT listed in the Locations screen—provide complete address and explanation for why the unit is there. Also document who authorized the trip to the new site. |
| - If tagging was required but the unit was not tagged. |
| SELECT the appropriate options from the Audit List dropdowns for Operational status, Condition and S/N Viewed. See codes and definitions below. |

OPERATIONAL STATUS: Indicates whether the unit was viewed in operation during the inspection.

| V  | Viewed Operating. |
| O  | Viewed Turned On but Not in Use. Explanation required. |
| I  | Non-mechanical but Installed (e.g., furniture, cubicles, non-electrical items). |
| NI | Not Installed. Explanation required for why it is not installed yet, when it will be installed, etc. |
| NO | Not Operational. Explanation required for why it is not operational (e.g., equipment has broken down, there is no one present who can operate the machine). |
| T  | Trailer/Non-operational Rolling Stock. |
| OB | Viewed in an Open Box. |
| SB | Viewed in a Sealed Box. Explanation required. |

Always make an attempt to view equipment in operation, even if the “View Equipment in Operation” option does not appear as a requirement on the Inspection Detail. Remember that the contact is the one operating the equipment; you will not be operating any equipment yourself.
**CONDITION:** Indicates the condition of the equipment.

Always ask the contact if the equipment is refurbished. If equipment is not refurbished, indicate the condition of the equipment—this is your opinion of how the equipment looks, regardless of the age.

- **R** = Equipment is Refurbished, per the contact.
- **N** = Appears New.
- **G** = Appears Used, in Good condition.
- **P** = Appears Used, in Poor condition. Explanation/description required.
- **D** = Appears Damaged. Explanation/description required.

If photos were ordered, take additional close-ups of damaged areas.

Please be observant, as many different kinds of equipment can appear new when they are actually refurbished. Many leasing companies will only finance brand new equipment. Yet, some people, in an effort to obtain financing, will say that the equipment is new when it is indeed used or refurbished. Keep in mind that someone who wants you to think the equipment is new is going to go out of his or her way to make sure that it looks new to you. Please be careful. A few industries/products to use extra caution with include: restaurants, manufacturing equipment, construction equipment, dry-cleaning equipment, computers, photo processors and some grocery/deli/meat cases.

**S/N VIEWED:** Indicates whether you viewed the manufacturer's serial number on the equipment.

- **VWD** = Viewed. The serial number was viewed on the manufacturer’s plate/tag on the equipment or on the outside of the box (if viewed in a sealed box). Important! This code does not indicate accuracy of the serial number—only that a manufacturer’s plate/tag was viewed. If a serial number discrepancy is noted, code the status of the unit “IO” (Info Obtained) and list the correct serial number in the appropriate field of the exception record.
- **OBT** = Obtained. S/N was not provided but was obtained from the equipment. Refer to the “IO” (Info Obtained) exception code for additional instructions.
- **POS** = Unable to view the S/N due to positioning of the equipment. Please ask the contact if equipment can be moved before marking this option. Explanation required.
- **UNA** = Unable to locate the S/N on the equipment after careful examination. Please ask the contact for assistance before marking this option. Explanation required.
- **NS** = Unit is a non-serialized product (i.e., the manufacturer did not assign a serial number to the item).
- **W** = S/N is worn/illegible. Explanation required.
- **UNU** = There is something unusual or questionable about the serial number plate/tag that must be noted. For example, possible tampering, numbers scratched out/altered, plate is damaged, S/N is handwritten, S/N is marked on tape or a paper tag, etc. Explanation required.

Please note that serial numbers are extremely important to our clients. They need to know the complete, correct manufacturer serial numbers of the equipment for identification purposes. If a lessee defaults on a lease and the equipment needs to be repossessed, or the lessee would like to return the equipment, the item has to be easily identified. Serial numbers (as well as make and model numbers) are the best form of identification. In many cases, leasing companies will file or modify equipment ownership documents based upon the serial numbers listed in our report.

**Providing an incorrect or incomplete serial number could mean that our client does not legally own the equipment in question.** This could have serious repercussions if the equipment ever needed to be repossessed. If the equipment cannot be recovered as a result of that error, Quiktrak and the inspector could be held financially liable for the loss incurred by the financing company. Therefore, please double-check the serial numbers to ensure that you have viewed and either verified or obtained the correct numbers.

If you are unable to view a serial number clearly or if a serial number is hard to read due to wear, this must be noted in the report.

Serial numbers are assigned to the equipment by the manufacturer; they are not “made up” by the inspector or the lessee.

On handwritten reports, print serial numbers legibly. It helps to write the letters larger than the numbers (for example: UPM67SG58BZ) and to put slashes through your zeros.
### Equipment Inspection Guidelines

**IF THE EQUIPMENT ITEM WAS NOT PERSONALLY VIEWED BY YOU, MARK THE UNIT WITH THE APPROPRIATE EXCEPTION CODE:**

- Highlight unit and add exception, selecting the appropriate code from the menu
- Mark the appropriate code in status box and record required information on the comment line for the item

(Note: The Operational, Condition, and S/N Viewed dropdowns are left BLANK for items that were not viewed.)

<table>
<thead>
<tr>
<th>STATUS</th>
<th>DEFINITION and REQUIRED INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID (Contact Could Not Identify)</td>
<td>The contact was unable to identify the unit, therefore you did not personally view the equipment. Before marking an item with this exception, please ask the contact if there is anyone else who can identify the equipment. It is important to make every effort to see the equipment. RECORD an explanation in the Note field.</td>
</tr>
<tr>
<td>IT (Internal, Not Equipment)</td>
<td>The unit is either internal or is not an equipment item that can be viewed by you. Internal—means the item is an internal component of something else. For liability reasons, we do not ask the contact to disassemble equipment in order to view internal items. Examples include: software installed on a computer, a hard drive, an internal modem, a sound/video card, and other various computer components. Not Equipment—means the item described on the equipment list is not actually equipment that can be viewed. Examples include: Shipping Charges, Service Contracts, Training Fees, Installation/Set Up Fees, etc. RECORD an explanation in the Note field.</td>
</tr>
</tbody>
</table>
| NA (Not Accessible) | The equipment was not accessible due to one of the following situations:  
- The contact would not give access/permission to view equipment.  
- No contact was made, no one was present to give permission to view equipment.  
RECORD an explanation in the Note field. |
| ND (Equipment Not Delivered) | The equipment has not been delivered yet and therefore cannot be viewed. RECORD the following information:  
- Expected delivery date (according to the contact) in the appropriate exception field.  
- Explanation in the Note field. |
| OL (Other Location) | The equipment is at another location and the client did NOT require it to be viewed. Always notify the client of any equipment that is at a location not provided on the inspection order to determine if additional travel is necessary. RECORD the following information in the appropriate fields:  
- Name of the location (if applicable)  
- Complete address  
- Type of location, in relation to lessee (e.g., branch office, job site, repair shop, etc.)  
- Explanation for why the item is there |
| RC (Returned, Canceled) | The equipment was returned, canceled, or was not ordered and therefore cannot be viewed. RECORD an explanation in the Note field.  
SELECT the appropriate option from the subtype dropdown:  
- Returned  
- Canceled  
- Not Ordered |
| O (Other) | No other exception code fits the situation. RECORD an explanation in the Note field. |
IF THE INSPECTION WAS REQUESTED AS A **GENERAL OVERVIEW**:

- Highlight unit and add exception, selecting the appropriate code from the list
- Mark “GO” in status box and record required information on the comment line for the item

(Note: The Operational, Condition, and S/N Viewed dropdowns are left BLANK for items that were not viewed.)

<table>
<thead>
<tr>
<th>STATUS</th>
<th>DEFINITION and REQUIRED INFORMATION</th>
</tr>
</thead>
</table>
| **GO**               | Equipment was not verified individually, but contact was asked if all the equipment on the provided list is present/delivered. A “General Overview” of equipment means you are not required to verify each individual item. You will instead ask the lessee contact to confirm if all the equipment has been delivered and make a general observation while at the business that it appears that all the equipment is there. **SELECT** the appropriate option from the **subtype dropdown**:
  - **Confirmed received**—if the contact confirmed the item is there.
  - **Not confirmed**—if the contact either could not confirm or advised that they have not yet received it. Provide an explanation in the **Note field**. |

* * * * * * *
Post-Inspection

PHONE CLEARANCE TO CLIENT

If phone clearance was requested, indicate who you spoke to and the date and time of the call in the designated area. Also indicate whether your clearance was left on voicemail.

PDA Reports:
Document who you spoke to in the Audit Recap screen on the PDA. Select the date from the calendar and edit the time stamp if necessary. Then select either “In Person” or “Voice Mail” from the Type dropdown.
Document details from the clearance call in the Notes screen. To access this screen, tap the <Note> button.

Paper Reports:
Document who you spoke to and the date and time of the call in the phone clearance section at the bottom of the General Comments page of the report.
Document details from the clearance call in the General Comments.

If clearance was not requested, leave the clearance section blank.

INSPECTOR SIGNATURE

Sign and date the report in the designated area.

SUBMITTING REPORT & PHOTOS

The report and photos (if required) are to be submitted to Quiktrak immediately upon completion.

PDA Reports:
Close the inspection, selecting “Send,” and then Revosync.

Paper Reports:
Fax to: 877 QUIK INS (877-784-5467)
-or-
E-mail to: reports@quiktrak.com
If you have included additional documents (such as the IS-900 form), please indicate the total number of pages in your fax on the first page of the report.

PHOTOS:
Submit using the Photo Upload feature on the Quiktrak web site.

If for any reason the report and/or photos cannot be submitted within 3 hours of the SCHEDULED inspection time, contact Quality Assurance at extension 6006 to provide an estimated time of receipt.
You may be required to provide your inspection results over the phone (depending on the length of the delay). Reports given over the phone must still be synced/faxed as soon as possible.

A member of the Quality Assurance (QA) team may have follow-up or clarification questions regarding your report if any questions are not answered completely or according to the guidelines. If contacted by QA, please respond in a timely manner.

PRIORITY REPORTS

If for any reason a PRIORITY report and/or photos CANNOT be submitted within 30 MINUTES OF COMPLETION, contact Quality Assurance at extension 6006.
You may be required to provide your inspection results over the phone (depending on the length of the delay). Reports given over the phone must still be synced/faxed as soon as possible.