

How To Setup ClickFORMS PhoenixMobile Integration

STEP 1. Download and Install Mobile App

1. On your iPhone or iPad, open the App Store and search for "PhoenixMobile Appraiser." Download and Install the *PhoenixMobile Appraiser* app.



2. Once the app has downloaded, tap the PhoenixMobile icon to launch the app.
3. Select Create New Account.
4. You will receive an email with the subject "Your PhoenixMobile User Account". If you have access to your email on your iPad or iPhone, open the email on your device and tap the Confirm button; if you do not, tap the Login option in the PhoenixMobile app and enter your email address and the password provided.
5. Once you have confirmed your email and password, you can start using the PhoenixMobile App to complete your field inspections.

STEP 2. Using Phoenix Mobile App

Please click here for the complete PhoenixMobile App user guide:

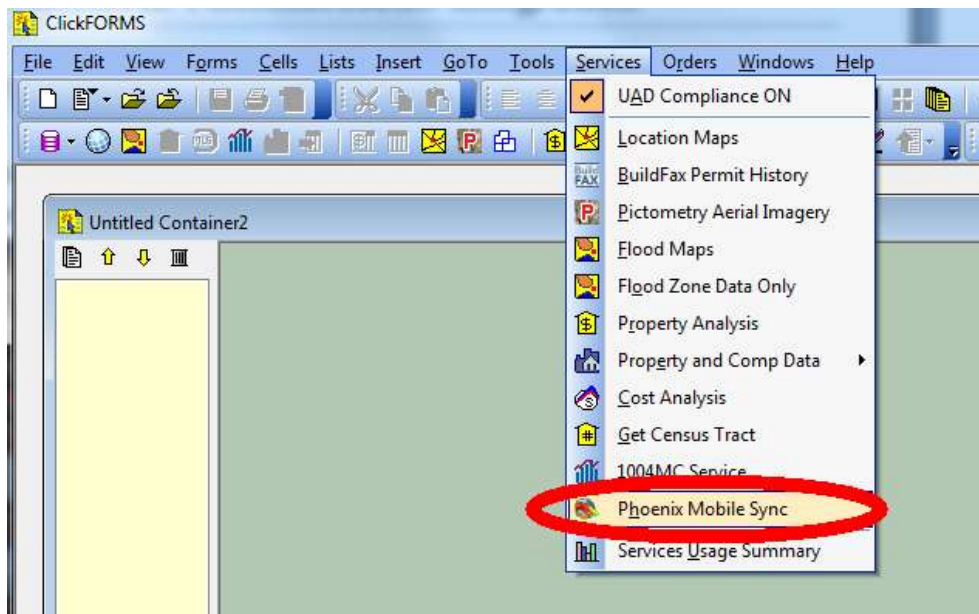
<http://cdn.phoenixsuite.com/website/mobile/manuals/ipad/toc.html>

STEP 3. Importing Data into ClickFORMS

1. Start with a new container, or open your existing template.



2. Click Services > PhoenixMobile Sync.

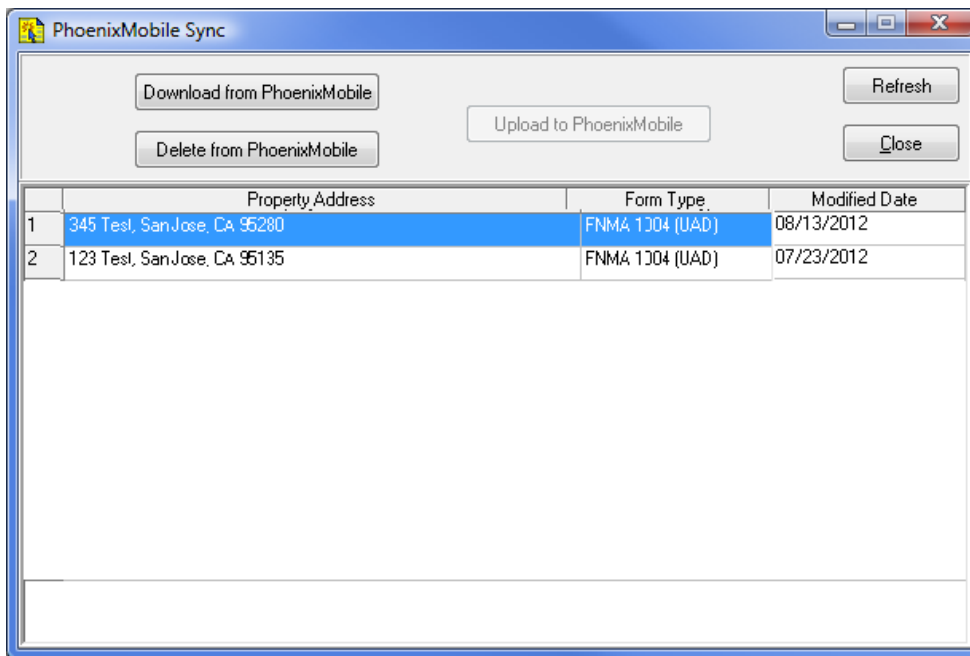


3. Enter the same email address and password you used to create your PhoenixMobile account.



A screenshot of the PhoenixMobile Login dialog box. The title bar reads "PhoenixMobile Login". The main text says "Please enter your PhoenixMobile account information". There are two input fields: "Email" with the placeholder text "YourEmail@Address.com" and "Password" with "xxxxxx". Below the password field is a checked checkbox labeled "Save Password". At the bottom are three buttons: "Go", "Cancel", and "Help".

4. Double Click or Select the Property Address and Click the Download button.



A screenshot of the PhoenixMobile Sync dialog box. The title bar reads "PhoenixMobile Sync". At the top are four buttons: "Download from PhoenixMobile", "Delete from PhoenixMobile", "Upload to PhoenixMobile", and "Refresh". Below these is a "Close" button. The main area contains a table with three columns: "Property Address", "Form Type", and "Modified Date".

	Property Address	Form Type	Modified Date
1	345 Test, San Jose, CA 95280	FNMA 1004 (UAD)	08/13/2012
2	123 Test, San Jose, CA 95135	FNMA 1004 (UAD)	07/23/2012

5. ClickFORMS will automatically open the main form, and download all the data, photos and image of the sketch from your mobile device into your ClickFORMS report.
6. Click Close to start working in your ClickFORMS report.
7. To delete the report from your PhoenixMobile account, highlight the report, then click Delete form PhoenixMobile. **CAUTION—THIS ACTION IS PERMANANT AND CANNOT BE UNDONE!**
8. To upload a report or template to your PhoenixMobile account, with the report opened in ClickFORMS, click the Upload to PhoenixMobile button. **PLEASE NOTE—For the Beta Release, in order to upload from ClickFORMS to PhoenixMobile, you MUST start your first report in the PhoenixMobile App. For the Beta Release Only, if you have no reports on the PhoenixMobile cloud, you will not be able to Upload from ClickFORMS. This will be resolved for the final release.**