Hello!

Thank you for downloading RiskSurvey+ for iPad - the risk survey app designed to streamline the insurance risk assessment and quoting process. We know you want to get started straight away so please follow the quick start instructions (you can always refer back to the detailed RiskSurvey+ manual).

Register & Subscription

+ Create a new account at apps.policym8.com

+ Once registered you can subscribe to RiskSurvey+ by clicking 'Subscribe' in the 'Products' menu

+ Complete the subscription form and as soon as the PolicyM8 invoice is paid you can start issuing licences – go back to the Products menu and click on 'View Users'

Download

+ Search for RiskSurvey+ in the App store (remember the App only works on iPads with version 14.1 and above)

+ Users will download RiskSurvey+ to their iPad and then add the licence key (sent by email) via 'Settings'.

Getting Started

+ Before you start a survey, please add a Contact and then add the Locations for the contact that you will be surveying

+ A list of surveys available under your licence will appear – simply tap on the survey name to get started

+ The left-hand menu contains the survey pages or tabs. You will note that some tabs have sub-pages to complete.

+ To create the survey report simply exit the survey tap on the 'envelope' icon on the applicable survey. This will generate the report in PDF format and open a new email to send the report.

+ You can duplicate survey by tapping on the 'envelope' icon.

BackUp

+ RiskSurvey+ does not store any of your data on its own servers, therefore it is critical to backup your surveys to your device
  + Customer Backup – open the Contact page > Edit > Backup
  + Complete Backup – Tap on Settings > Backup