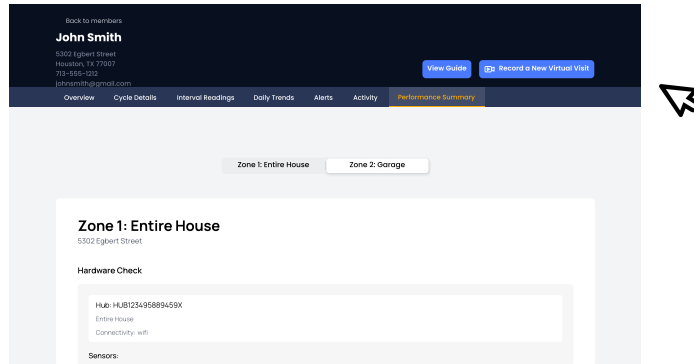


1

On the Member's Account Page on the Dashboard, navigate to the Performance Summary tab, then **locate and click the button labeled "Record New Visit."** If you'd like to watch an example video first, [CLICK HERE](#).



2

To create Virtual Visit videos, **sign up for an account with Loom*** - a video messaging tool that has been integrated with SmartAC.com. **Up to 5 Loom licensed users are included with the Starter account. Choose the membership plan that works best for your company's needs.**

To get started, visit <https://www.loom.com/pricing>. From there, follow the sign-up steps for the Starter and Business plans, or contact the Loom sales team for the Enterprise plan.

A pricing comparison table for Loom. It features three columns for different plans: Starter, Business, and Enterprise. Each plan has a title, a description, a price, a sign-up button, and a list of included features. The Starter plan is free and includes up to 25 videos/person and up to 5 mins/video. The Business plan is \$12.50 USD/Creator/mo (annually) and includes unlimited videos and unlimited recording length. The Enterprise plan is for scaling teams and includes unlimited videos and unlimited recording length. Each plan also lists key features like screen recording, transcriptions, privacy controls, viewer insights, and team workspace. The Business and Enterprise plans also include Loom AI add-on, Salesforce integration, request email to view, SSO (SAML) and SCIM, and advanced content privacy.

Starter	Business	Enterprise
For individuals	For teams	For scaling teams
Free	\$12.50 USD/Creator/mo (annually)	Let's Talk
Sign Up, It's Free	Start Free 14-Day Trial	Contact Sales
Includes: <ul style="list-style-type: none">Up to 25 videos/personUp to 5 mins/video	Includes: <ul style="list-style-type: none">Unlimited videosUnlimited recording length	Includes: <ul style="list-style-type: none">Unlimited videosUnlimited recording length
Key Features <ul style="list-style-type: none">✓ Screen recording & cam bubble✓ Unlimited transcriptions✓ Video privacy controls✓ Viewer insights✓ Team workspace	Everything in Starter, plus <ul style="list-style-type: none">✦ Loom AI add-on available✓ Edit by Transcript NEW✓ Remove Loom branding✓ Embed links in video✓ Import and download✓ Password protected videos	Everything in Business, plus <ul style="list-style-type: none">✦ Loom AI add-on available✓ Salesforce integration (Beta) NEW✓ Request email to view NEW✓ SSO (SAML) and SCIM✓ Advanced content privacy

****SmartAC.com has partnered with Loom for the express purpose of bringing Virtual Visits online. We plan to update this feature in future releases to remove the need for a 3rd party accounts.****

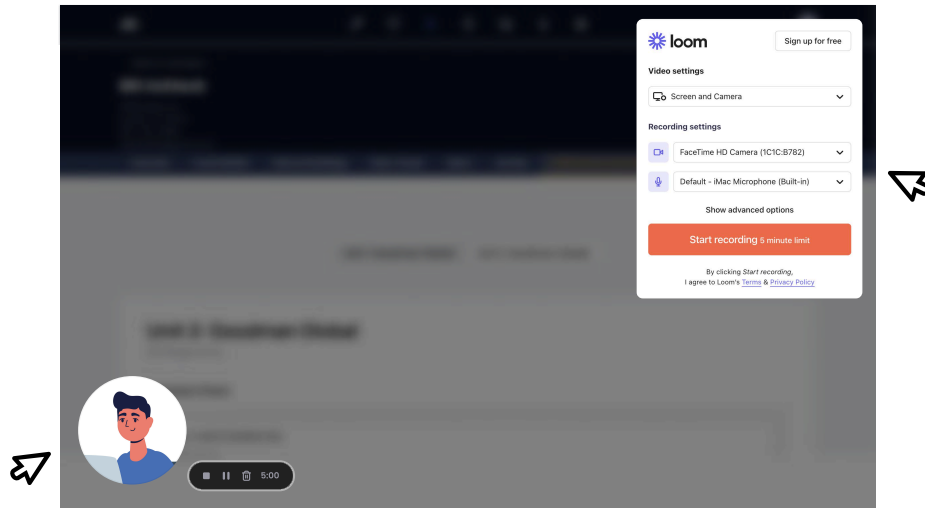
3

On the next screen, **select "Record New Visit"**



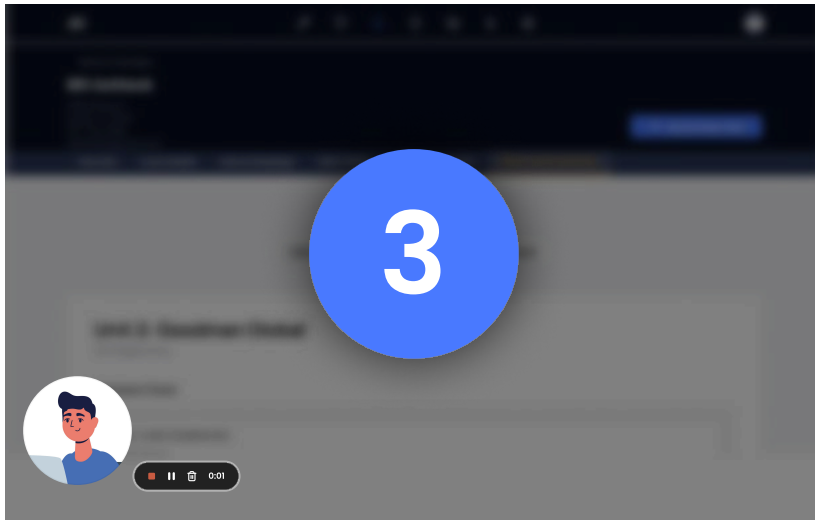
4

On the next screen, **choose your desired video settings and recording settings** from the menu in the top right of the screen. If the camera on your device is working properly, you should see yourself in the bottom left.



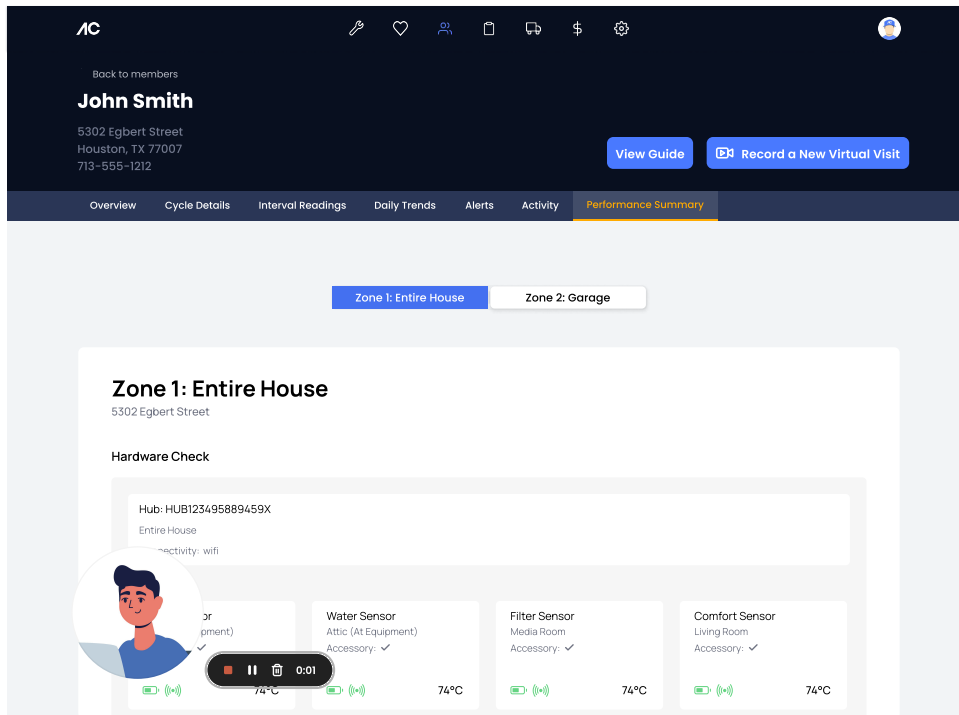
5

Select "Start Recording" and a 3 second countdown will begin.



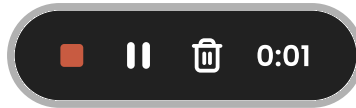
6

Scroll down the member's Performance Summary as you record your Virtual Visit to make sure you cover all of your data points.



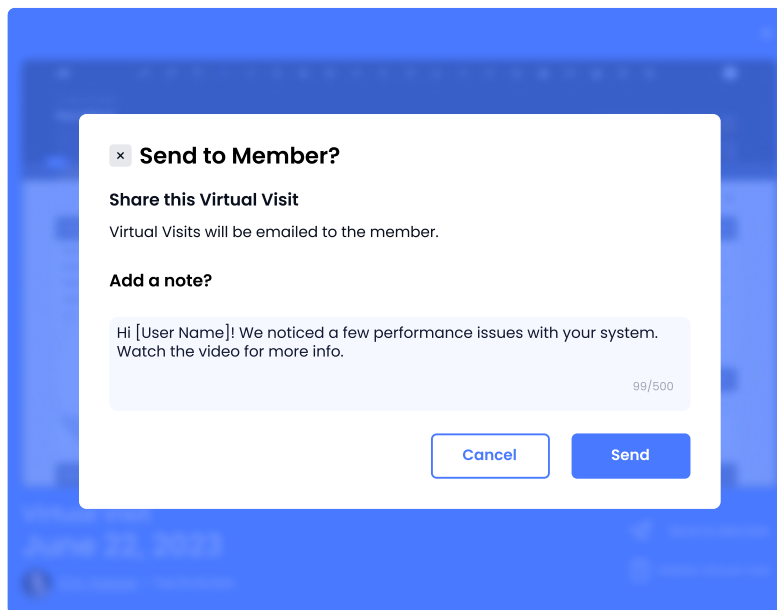
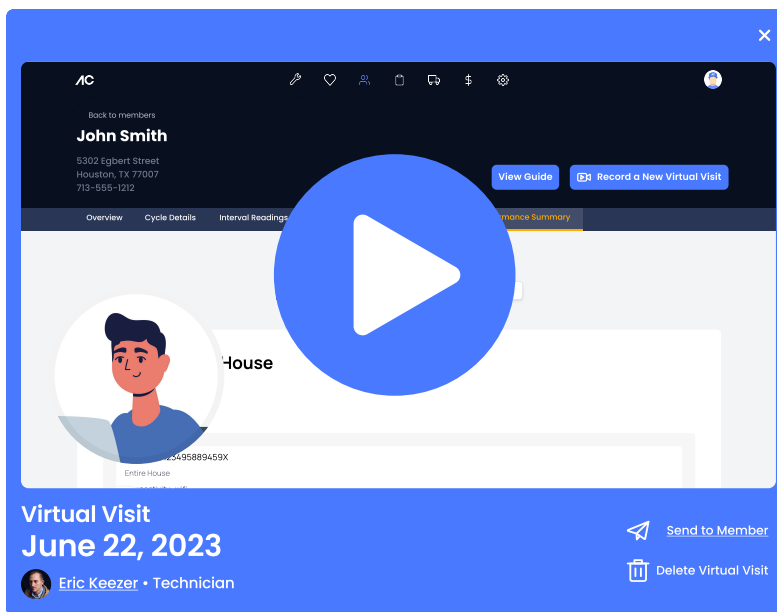
7

When you've reached the end of the Virtual Visit, **click the red stop button** next to your image in the bottom left of the screen to end the recording.



8

Now you can watch the recording, delete and start again, or **send the video to the desired member.**



9

Below is how the note will appear in the email to the member.

smartAC.com CHANGE IS IN THE AIR[®]

NEW VIRTUAL VISIT

Hello [User Name]

[Partner Company] has sent you a new **Virtual Visit** for you to review!

Hi [User Name]!
We noticed a few performance issues with your system. Watch the video for more info.
-Genair Service Provider

Virtual Visit
June 22, 2023

Eric Keezer • Technician








[Click here to watch your Virtual Visit](#)

Use this example script as a guide during your Virtual Visit so that you cover all data points.

INTRODUCTION

Example: Good Afternoon, (Member Name). My name is (Employee Name) with (Company Name). We're going to perform your Virtual Maintenance Visit for your HVAC system located at (address of HVAC system).

CHECKLIST

-  Take a look at the Current Urgent Performance Alerts and explain anything that looks concerning, data-wise.
-  Go over the SmartAC.com hardware health, battery life, and signal levels. If any hardware requires attention, recommend contacting support using the Virtual Tech Chat.
-  Check the health of the air filters and provide a projected filter lifespan with an estimate of how soon a replacement is needed.
-  Check the date of the last tune up (most recent service date) and determine if the system is due for another tune up.
-  Go over the system type and the age of the system. Mention the typical system lifespan of about 12 years, and estimate how long before the member should expect to replace any major components.
-  Review the cycle details, and explain the system performance and cycle data. Provide a performance rating for the system overall. Example: Excellent, Good, Fair, etc.
-  Review the trending data for the past 30 days (average cycle time and daily runtime within Daily Trends).

CLOSING

Example: As a reminder, if you have any questions, you can reach out to us via the Virtual Tech Chat in the SmartAC.com homeowner app. You can also see details about your system performance in the Cycle Details area of the app.

We will be back in touch for your next Virtual Maintenance Visit which will be around 6 months from now. Thank you, and have a great day!