CO HOME IMPROVEMENTS

The Vault

Designer's guide

Running an appointment from start to finish, and what your customer sees at every stage.

Written for: designers (surveyors will find sections 4 and 7 useful too).

Works on: your phone, tablet or laptop. Everything here is done on the phone you take to the appointment.

Brands: Yorkshire Windows, West Yorkshire Windows, Trent Valley Windows, Orion Windows, ClearView and Planet.

A note on the screenshots. The names, addresses and PIN in these pictures are made-up examples. What you see on your own screen will have your real jobs. The app changes often, so a button may have moved a little since a picture was taken.

What is in this guide

1. Before your first day: sign in, your phone, reminders, your profile and portfolio
2. Start each day on My day
3. Before the visit: the job, the customer page, their messages
4. On site: getting there, the survey, photos, recording, snags
5. After the visit: the quote, the personal letter, switching the price on
6. What your customer sees
7. If something goes wrong
8. One-page checklist

The idea in one line. Every customer is a job. You open the job, do the survey on site, give the customer their own page (their Vault) with a PIN, upload the UDesign quote, and The Vault reminds you who to catch up with.

1. Before your first day

Sign in

Your admin sends you an invitation. Open it, choose your own password, then sign in with your email and password. Use the same email every time.

1. Open the app address your admin gave you.
2. Type your email and password and tap Sign in.
3. If you forget your password, ask your admin to send you a new invitation.

Put it on your phone

Adding it to your phone makes it open like any other app, and it is needed for reminders on an iPhone.

1. **iPhone:** open it in Safari, tap the Share button, then Add to Home Screen.
2. **Android:** install the COHI app your admin sends you, or open it in Chrome, tap the three dots and choose Install app. In the app, the back swipe takes you back one page instead of leaving the app.

Turn on reminders

Open My day (next section). Near the bottom is a card called Reminders. Tap Turn on, allow notifications when your phone asks, then send yourself the test. You will then get:

- A nudge about an hour before each of your appointments.
- A message when one of your customers opens their project page. That is a good moment to get in touch.

iPhone only. Reminders only work once the app has been added to the Home Screen and opened from there. If the card says so, do that first.

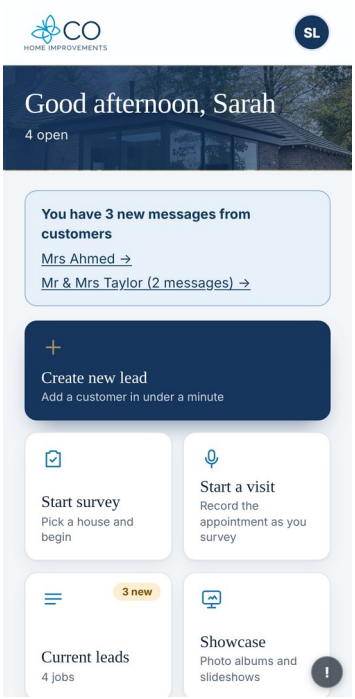
Your profile: how customers see you

Your profile is what the customer meets in their Vault, under Meet your designer. A complete one makes a real difference to how the first message lands. Tap your initials at the top right, then My profile.

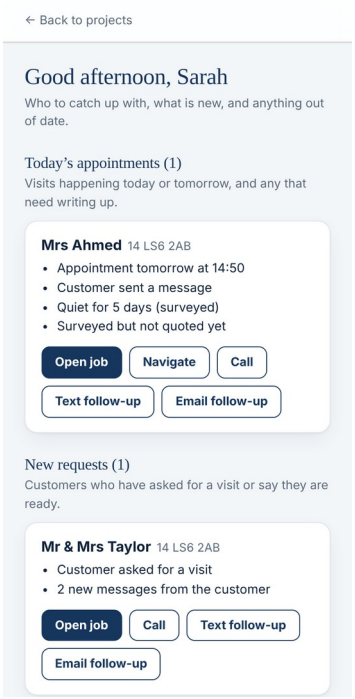
Photo	A clear head and shoulders picture. This is the first thing the customer sees of you.
How customers reach you	Your own phone and email. They show as the Call and Email buttons in the customer's Vault. Leave a box empty to show the company one instead.
Your intro video	A short hello, if you have one. It shows as Watch a short hello from you.
Your designs	Up to 12 pictures of your own work, each with a short caption. Customers see them as Some of your designs under your introduction. Use pictures you are proud of and are happy to show.
Brands you work for	The brands you sell. The customer sees which ones.
Pets at the visit	Tick the pets you are happy to meet. The customer sees a friendly note that they need not put them away.
Your maps app	Google Maps, Apple Maps or Waze, for the Navigate button (see section 4). Saved on this phone.
How customers see you	A preview of your profile as a customer would see it.

2. Start each day on My day

The home screen has a big Create new lead button and tiles for everything else. The tile you will use most is My day. It is a short, friendly list of who needs you today.



Home screen. Create new lead is at the top.



My day: appointments first, then new requests, then catch-ups.

Today's appointments	Visits happening today or tomorrow, and any that still need writing up.
New requests	Customers who have asked for a visit or said they are ready to go ahead. Answer these first.
Catch up with	Customers who have gone quiet: surveyed 3 days ago, quoted 5 days ago or not visited 7 days ago.
Tidy up	Jobs with details missing, such as no phone number or email.

New messages from customers

When a customer writes to you from their Vault, a blue box appears at the very top of the home screen, above the tiles. It names each customer who has written and how many messages they sent. Tap a name to go straight to that conversation. The box checks again every minute, and disappears once you have opened the messages.

One-tap follow-up

Under each customer who needs a nudge are buttons: Open job, Call, Text follow-up and Email follow-up. Text and Email open your own messages app with a friendly message already written, signed with your name and the brand. Read it, change anything you like, then press send yourself. The message never includes a price.

Your diary: coming soon

A Diary, a calendar of your week that fills itself from your lead appointments, is being tested and is not switched on for designers yet. Until then, your appointments are on My day and on each job page. We will tell you when it arrives.

3. Before the visit

Create the job

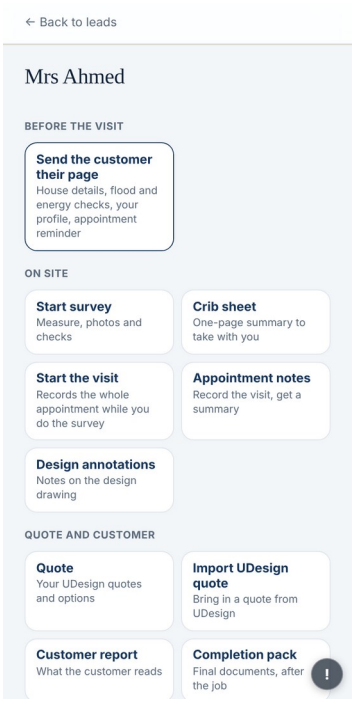
1. On the home screen tap Create new lead.
2. Either type the customer's name, address, postcode, phone and email, or tap Choose screenshot and upload a screenshot of the lead. It fills in the name, phone, email, house number, street, postcode and the appointment date and time. It only fills blanks, and a date without a time is refused rather than guessed. Check what it read before you create the job.
3. Set the appointment date and time on the job page if it is not already there. Your reminder is based on this.

Get ready for poor signal

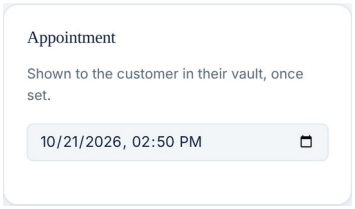
While you still have signal (at home or in the office), open My day and then each job you are visiting, and the survey. That saves them on your phone. At the appointment they open even with no signal at all.

The job page

Every customer has one job page. Tiles lead to each step. The card you will use most, Customer vault access, sits near the top: the PIN in large figures, and the access level (Designer access) as a big drop-down that decides how much the customer can see. Below it are the appointment, photos, notes, the invite messages and the snag list.



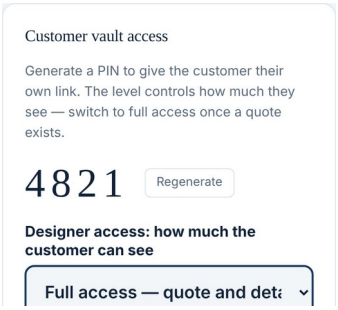
The job page. Tiles for each step, in order.



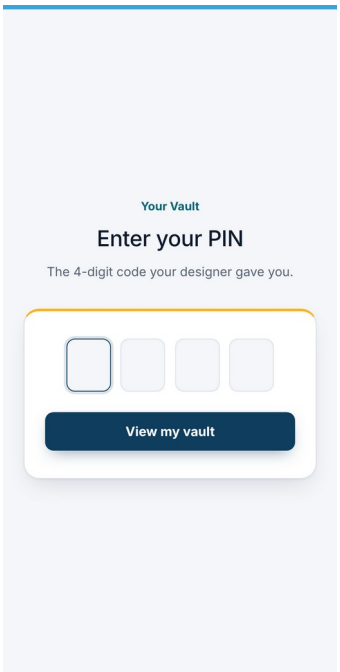
Set the appointment time here. It appears in the customer's Vault and drives your reminder.

Send the customer their page

Each customer has their own page (their Vault) protected by a 4-digit PIN. It shows their project, photos and, once you switch it on, the quote.



The PIN and the access level at the top of the job page.



What the customer sees first: they type the PIN.

1. **Generate the PIN** if the job does not have one yet.
2. **Check the access level.** Leave it on Tease while there is no quote yet. Switch to Full access once a quote exists and you want them to see the price.

3. **Pick Before the visit or After the visit** in the Invite the customer box. Before the visit explains who is writing, when you are coming, what the page is and that no payment details are needed, so it is not mistaken for spam. After the visit is short, because they have already met you.
4. **Send the link and the PIN as two separate messages.** Anyone who only sees the link cannot open anything.
5. **If the customer is locked out** (too many wrong PINs), tap Regenerate. That makes a new PIN and unlocks them. Send the new PIN.

Show them where they live (optional)

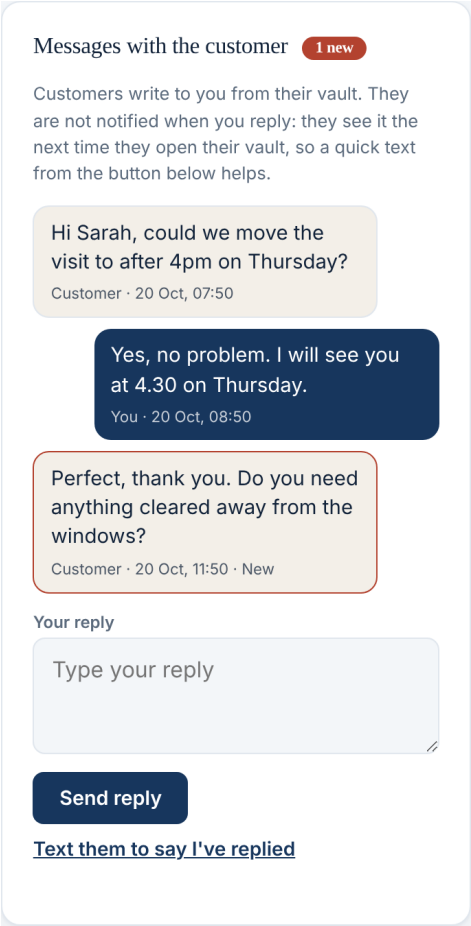
On the job page, Look up property data collects public information about the address: the area, past sales, the energy rating, flood and conservation-area checks and local crime figures. It also runs by itself once a visit is booked. Under it is a box: Show a short summary to the customer in their vault. Tick it when you are happy for the customer to see it.

- What they would see: the area and a map of the neighbourhood, sales at their exact house, a rough guide to local home values, the energy rating if it was matched to their house, whether the flood check found a flood zone, last month's crime counts nearby and any conservation area.
- What they never see: listing status, Article 4 directions, tree preservation orders and planning applications. Those stay with you until you have confirmed them on site.
- Everything is worded as indicative. A postcode covers about 15 homes, so you confirm on site.

Why it matters. The "What an extension could add" and return-on-investment figures in the customer's page are built from this lookup. Without it, they are not shown.

Messages from your customer

Once a customer has their PIN, their Vault has a message box. Their message reaches you in two ways: your phone buzzes with a notification (it never shows what they wrote, so nothing private appears on your lock screen), and the blue box appears on the home screen. Open the job and scroll to Messages with the customer to read it and reply.



The Messages card on the job page. New messages from the customer are outlined in red.

1. **Reply from the job page.** Keep it short and friendly.
2. **Then send a quick text.** Customers are not notified when you reply, so tap Text them to say I've replied. This is the step that stops customers waiting for an answer they have already had.
3. **Anything urgent:** ring them rather than relying on messages.

4. On site

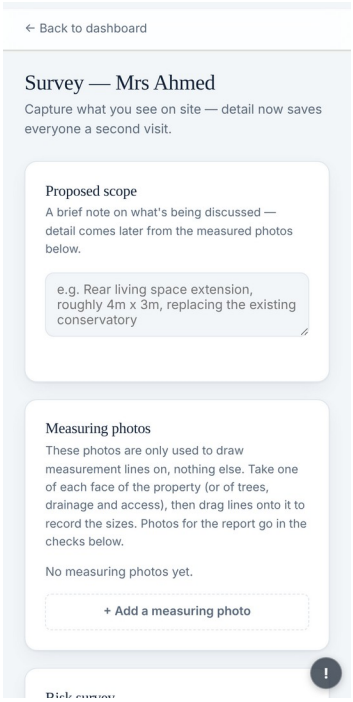
Getting there

On the job page, Navigate opens your maps app with the full address filled in. When arrival times are switched on, it also works out when you will arrive, and the customer's Vault tells them you are on your way, but only when you are due between 10 minutes before and 30 minutes after the appointment. Tap I have arrived when you get there. Your location is used once and never stored.

Start the survey

1. Open the job and tap Start survey.
2. The first section is Job: is this a new build, a roof and frame swap or a roof only? Choose carefully. A roof and frame swap, or a roof only, gets a shorter survey with just the questions that matter for that job.
3. Work down the page: scope of the work, roof type, planning status, the property checks, then photos.

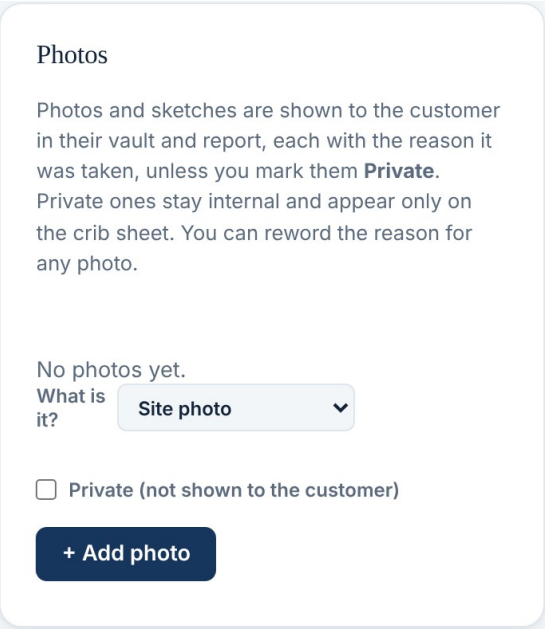
4. Each answer saves as you tap it, and a small pill shows Saving, or how many are saved on the phone waiting for signal, or All saved. You never wait for the network.



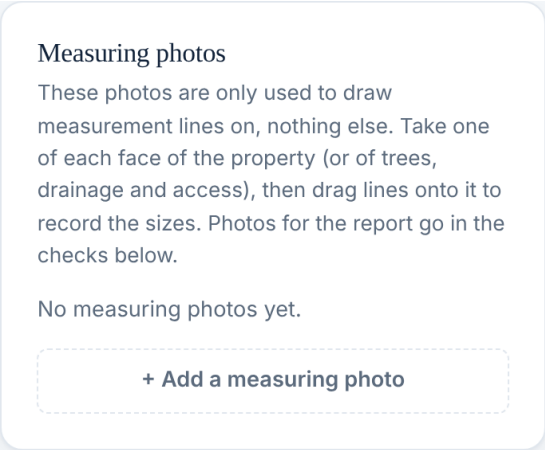
The survey starts with a short note about what is being discussed, then the measured photos.

Taking photos

Tap a photo button and choose Take a photo (uses your camera) or Choose from your photos. In the Android app, Take a photo opens the app's own camera. Each photo records when it was taken and is shrunk on your phone before it is sent, so it is quick even on a weak signal. Say what it is, and mark it Private if the customer should not see it.



Photos on the job page.

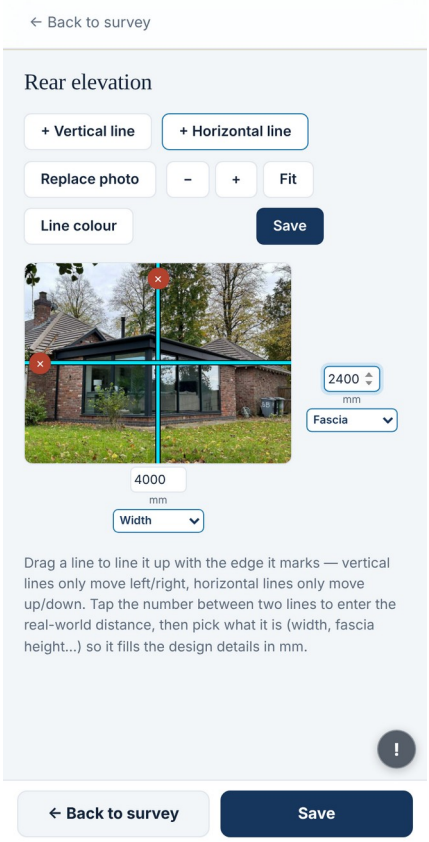


Measuring photos in the survey: a photo of each face of the property to draw measurements on.

Measuring over a photo

In the survey, tap Add a measuring photo and take a photo of one face of the property (front, rear, side, or the trees and drainage). Then measure on top of the photo itself:

1. Tap + Vertical line or + Horizontal line. Drag each line to sit exactly on the edge it marks. Vertical lines only move left and right; horizontal lines only move up and down.
2. Use the − and + buttons to zoom in for a precise placement, and Fit to go back.
3. Tap the number between two lines, type the real-world distance in millimetres, then pick what it is: width, projection, fascia, window, door, wall or other.
4. Press Save. The sizes you tagged fill in the design details for you.



Measuring over a photo: lines on the photo, with the real size and what it is.

- Measuring photos are only for drawing lines on, and a round magnifier shows above your finger so you can place a line exactly.
- No signal? The photo is kept on your phone and waits. A message says how many are waiting, and they upload by themselves when you are back online. Keep the app open until that message goes away.

Record the visit

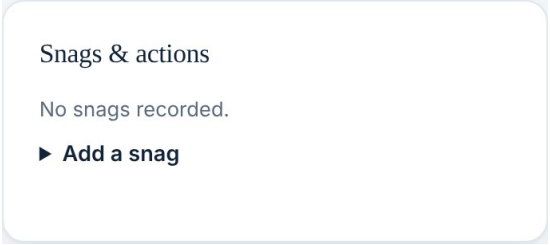
The Start a visit tile can record the appointment. Only press Start recording after the customer has said it is OK, and tick the box to confirm that. You then get a written summary in Appointment notes.

- If a long recording produces very little text, the notes page says plainly that most of it is missing and points you to Saved recordings on your phone. The audio stays there until it has been turned into text.

- To score the appointment, pick First visit, One-call close or Second visit in the notes and press Score this appointment. The score is checked against the transcript: any quote it cannot find is marked as unconfirmed.

Snags and actions

Anything that needs putting right or following up goes on the Snags and actions card at the bottom of the job page. Tap Add a snag, describe it, and save. You can come back and tick it off later.



The Snags and actions card.

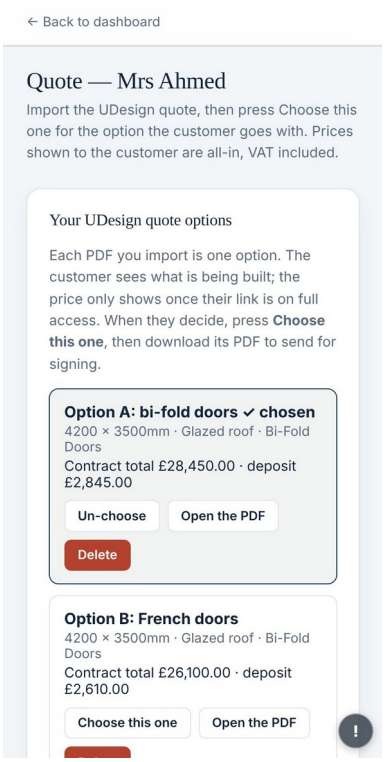
5. After the visit

Import the UDesign quote

Open the job and tap Import UDesign quote, then upload the PDF. Each PDF is one design option. The importer reads the price and deposit, and now also reads the order form and every line of the scope of works: frames, roof, groundworks, plumbing, electrics, plastering, breakthrough, installation, scaffolding and more.

- Anything the quote does not include is kept too. A section where everything is No reads as, for example, No plumbing on quote, so the customer sees what is not included as well as what is.
- The design drawing from the PDF is saved with the option. The box Show these drawings to the customer in their Vault is ticked by default. Untick it to keep the drawings staff-only.
- Anything that mentions money, and the internal notes and site allowances, never reach the customer.
- Check the door line and the other details on the import screen before you save. If a field looks wrong, correct it there.

When the customer decides, open Quote and tap Choose this one. Prices shown to the customer are all-in with VAT included.



The quote page: each UDesign PDF is an option.

Write the personal letter

In the site notes on the job page, tap Draft a personal letter. It writes a first draft to the customer from facts already on the job: their name, the size, roof, frame colour and door, the headline electrics, and what is not on the quote. There is no AI and no price in it, and nothing is saved until you press Save notes. It will not overwrite notes you have already written. Read it, make it sound like you, then save. The customer reads these notes in their project report.

Show it to the customer

1. When the quote is ready, go back to the job page and change the access level to Full access.
2. Tell the customer their page now shows everything. They can ask for a visit or say they are ready to go ahead, and you will see that on My day under New requests.
3. Open My day again in a few days. If they have gone quiet, they will be under Catch up with, and the follow-up buttons are right there.

Close the job

At the bottom of the job page, Closing the job lets you pass the job to the contracts team, mark it as a sale, or record the outcome if the customer did not go ahead.

Deleting a job. If a job was made by mistake, an admin can use Delete this job at the very bottom of the job page. This removes everything about the job, including its photos, so it asks you to confirm. Do not use it for a customer who simply said no. Use the outcome instead.

6. What your customer sees

The customer's page builds up as the job moves on. You decide how much they see with the access level.

Tease (before a quote exists, or before you switch the price on)	Their project at a glance, the journey ahead, the visit, what was discussed, your profile and designs, how we work, awards and standards, guarantee, area and homes like theirs. Once designs are uploaded they also see each design with everything included in it (electrics, plumbing, groundworks and so on) and the drawings, but no prices.
Full access	Everything above plus the price, deposit, finance options, the designer's note and the quote lines. They also see Where your money goes (shares of the price, never line prices), and the estimated return (see below).

The newer sections, in plain words

Everything included in this design	The line-by-line detail from your UDesign quote, with what is not included, and the drawings if you left them ticked.
What approvals you are likely to need	Careful guidance on planning permission, building regulations and party walls from the depth of the design and whether the home is in a conservation area. Always worded as usually or may, and always ends by saying you will confirm. It is not shown for a roof and frame swap.
What an extension could add / return on investment	A range for the value a new space might add to the home, worked from nearby sale prices and the size of the design. It is an estimate, not a valuation or a promise. At full access it also sets that range against the price. Not shown for a roof and frame swap, because no new floor space is added.
Where your money goes	The quote grouped into headings such as Roof, Walls and structure, and Windows and doors, as whole-number shares. If the lines cannot be grouped clearly it is left out rather than guessed.
Some of your designs	Your own portfolio from My profile.
How the sun reaches your new space	Real solar figures for their postcode, drawn as a sun path.

Be straight with customers. The page is built to explain the price honestly, not to pad it. The return figure is always a range with its working shown. If a customer asks how it was worked out, the answer is on the card.

Previewing it yourself. Open the customer page with the Preview link on the job page. The customer's own link and PIN show exactly what they see.

7. If something goes wrong

The page will not load or looks odd	Pull down to refresh. If you are on a home screen app, close it fully and reopen it. After an update the first load can show the older copy, so open it twice.
No signal on site	The Vault keeps working. Pages you have opened before still open, a bar at the top says you are offline, and your notes, survey answers, snags and job edits are kept on the phone and sent by themselves when signal returns. Photos wait and upload too. Keep the app open for a minute once you are back online. Creating a new lead, importing a quote and deleting things need a signal.
The camera will not open	Allow camera access when your phone asks. On Android, check Settings, Apps, the app, Permissions, Camera. If it still will not open, use Choose from your photos, and tell your admin.
The customer cannot open their page	Check they are typing the right PIN. Tap Regenerate on the job page and send them the new one.
The customer sees a wrong detail (for example a door)	Open the quote option from Quote, correct the detail or re-import the PDF, and ask the customer to refresh.
No return figure or approvals card on the customer page	The return figure needs the property lookup and the toggle ticked, and neither card is shown for a roof and frame swap. Approvals need a design with a depth.
The aerial picture is missing from a report	The satellite picture has a daily and monthly limit to keep costs at nothing. Reopen the report later, or tell your admin.
A customer says nobody answered	Check the blue box on the home screen and the Messages card on the job page, reply, then send a quick text.

Customer privacy

Do not send a customer their PIN and link in the same message. Do not share screenshots of customers' pages outside the company. If a customer asks for their information to be corrected or removed, tell your admin the same day.

8. One-page checklist

Before the visit	On site	Afterwards
☐ Job created with phone and email	☐ Job type chosen at the start of the survey	☐ UDesign quote imported and checked (door line too)
☐ Appointment time set	☐ Photos taken (every face of the property)	☐ Drawings ticked or unticked on purpose
☐ Property data looked up	☐ Snags added for anything to follow up	☐ Personal letter drafted, read and saved
☐ Customer page sent: link first, PIN second	☐ Recording only if the customer agreed	☐ Access switched to Full access
☐ Reminders on; your profile and designs filled in		☐ Follow up from My day within 5 days

Questions, or something missing from this guide? Tap the round ! button in the app and tell us.