

Help your clients get organized with an intelligent user guide customized specifically for their homes.

Clear paper clutter by storing user manuals, receipts, and other important documents digitally

Why Centriq?

Help your clients clear their paper clutter by storing user manuals, receipts, and other important documents digitally

With Centriq, you can create an intelligent user guide, customized specifically for your client's home. This will help your client more easily care for and maintain their home, and will help them get more organized and clear paper clutter.

Building the user guide is EASY. The first step is to add your client's major appliances and systems. With just a photo of the nameplate, Centriq will retrieve everything your client needs to know – from user manuals, to parts & supplies for future maintenance, and even “how to” videos from experts. For most houses, that's just 10 photos or less. Then, capture all of the things your client wants to remember about their house. And finally, easily transfer Centriq with all this great information to your client.

This document will help you capture key information that will be most useful to your client

Knowledge Capture Guide

Step 1: Add Appliances & Systems

Getting the manufacturers' information is EASY with Centriq:

All you do is take 1 photo each for the major appliances and building systems, Centriq does the rest.

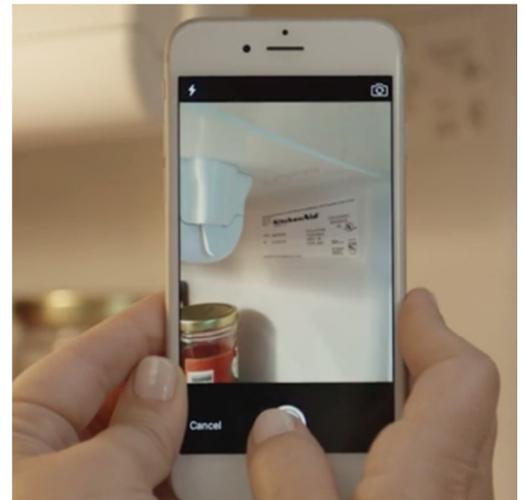
Use Centriq to get the manufacturers' information on appliances and systems

Just take a few simple photos of the, and Centriq gets user manuals, parts & supplies, and "how to" videos

Download Centriq, and set up your client's account with their email and a password you'll remember and share later.

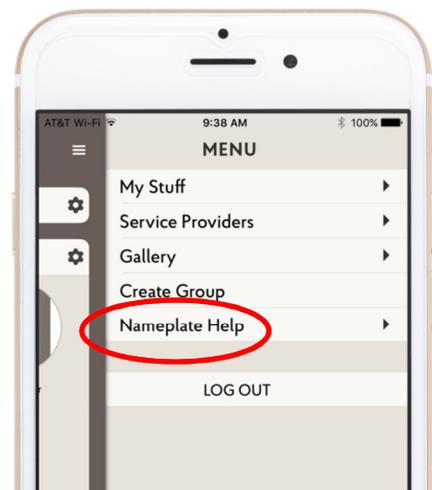
Be sure to capture:

- Refrigerator
- Stove/Range
- Range Hood
- Toaster
- Microwave
- Dishwasher
- Washing Machine
- Dryer
- Water Heater
- HVAC system
- Pool/Spa Equipment



Take a picture of the nameplate – the label with make, model and serial #

If you can't find the nameplate, open the menu and use the nameplate help:



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Your clients will know they have one place to turn for everything they need to know about their house, and won't have to worry about remembering it all.

Step 2: Capture client's knowledge

Capture the most common information homeowners need in a variety of ways

- Take videos or photos
- Upload receipts and important documents
- Add contact info for service providers
- Add a note for other information

General Questions:

- What are the names of the paint colors in each room, is there any paint left over, and if so, where is it located?
 - Take photos of paint cans or swatches, and add a note about amount and location of leftover paint
- Where are cable modem and Wi-Fi located?
 - Add a photo or note to the appropriate room
- Do you have any service providers – plumber, gardener, electrician, general contractor, pool service, etc. – who have worked on the house?
 - Easily upload contact info from their address book
- Are there programmable systems (like a drip irrigation system)?
 - Add a short video about how to use it
- Do you have floor plans for the house?
 - Upload floor plans
- Do you know how to replace the furnace filter, or relight the pilot light?
 - Add videos

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Be sure to capture information from any regular service provider, like gardeners.

Kitchen:

- Can you provide warranty/purchase information for all appliances?
 - Upload receipts and warranties
- How do you load and run the dishwasher?
 - Record a video
- How do you replace the filter in the range exhaust hood?
 - Record a video

Garden

- How do you program the drip irrigation system?
 - Record a video
- Can you provide names of the main plants and trees?
 - Use “Add Item” to add plants and trees (see how)

Exterior

- When was house last painted? What are the names of paint colors, is there any left over, and if so, where is it located?
 - Add a note with the date last painted, take photos of paint cans or swatches, and add a note about amount and location of leftover paint
- Where is the gas shutoff, and how do you use it?
 - Record a video
- Where is the water shutoff, and how do you use it?
 - Record a video
- When was roof replaced? Name of firm that did the work?
 - Add a note, upload receipt, upload service provider

Anything else?

- Think about anything your client will want to remember, or convey to others, and capture it in Centriq

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Step 3: Transfer it to the client

Once you give your client access to the account, all this knowledge and information will be at their fingertips when they need it.

Once you're finished capturing all this information, just have your client download Centriq and give them the password

Your client will be able to log-in to the Centriq account you have created for them, and all of the information will be there. Then, they can choose to change the password if they want the account to be private, or they may choose to continue to share it with you for future organizing projects.