



Minimum Property Standards Report System Set Up and Onboarding Guide

TABLE OF CONTENTS

| | |
|--|----|
| <u>Introduction</u> | 2 |
| <u>Step 1: Create a JotForm Account</u> | 3 |
| <u>Step 2: Import the MPS Evaluation Form</u> | 4 |
| <u>Step 3: Set Default Inspector Information</u> | 6 |
| Step 4: Settings | |
| o <u>4a: Form Settings</u> | 8 |
| o <u>4b Email Notifications</u> | 9 |
| <u>AUTORESPONDER 1</u> | 9 |
| (notification to inspector of completed report w/ report attached) | |
| <u>Autoresponder 2</u> | 13 |
| (Email to client with attached report) | |
| <u>Step 5: Creating Mobile Application</u> | 15 |
| <u>Step 6: Access and Use the Form</u> | 17 |
| <u>Troubleshooting & FAQ's</u> | 19 |

INTRODUCTION

This guide provides step-by-step instructions to help users quickly and easily set up and use the Minimum Property Standards (MPS) Evaluation Form through JotForm.

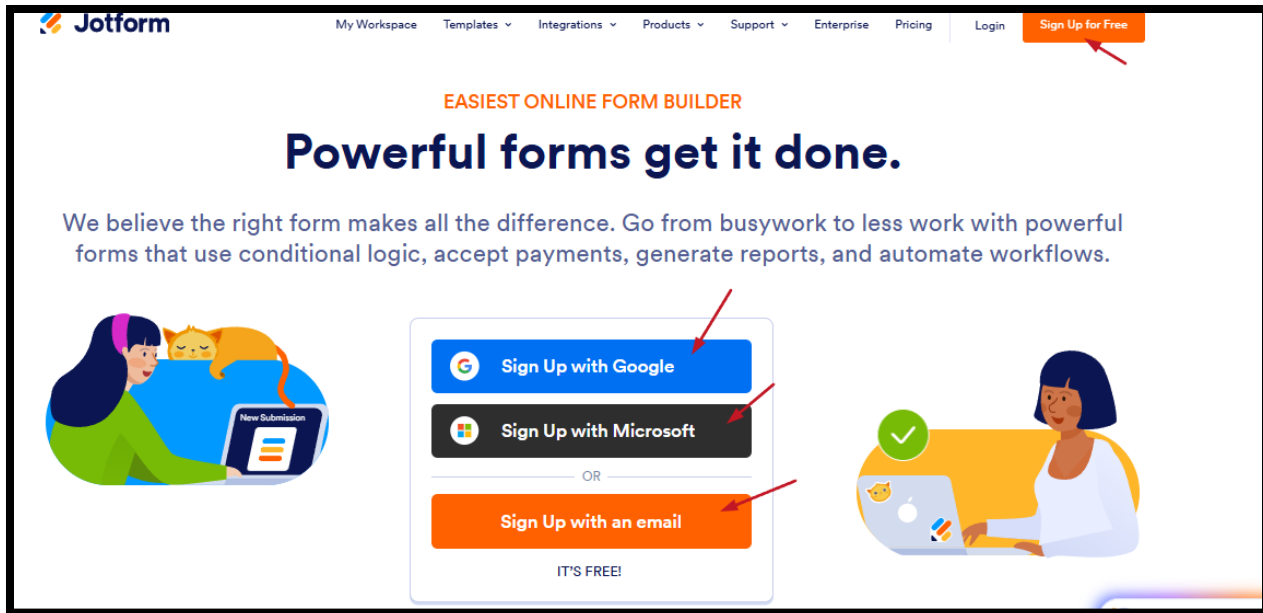
By following this process, you will be able to quickly generate accurate, professional PDF reports that can be shared with clients after completing a property evaluation. The system is designed to streamline your workflow, improve consistency, and ensure all required information is properly captured.

This guide will walk you through creating your JotForm account, importing the MPS form, customizing your default information, configuring report settings, and setting up automated email notifications.

Please follow each step carefully to ensure your system is set up correctly. If completed properly, you will have a fully functional reporting tool that can be used on both desktop and mobile devices.

Weekly User Orientation and Onboarding Sessions are available. [Register here](#) for an upcoming session.

Step 1: Create a FREE jotform.com account using the email address that you want clients to see .

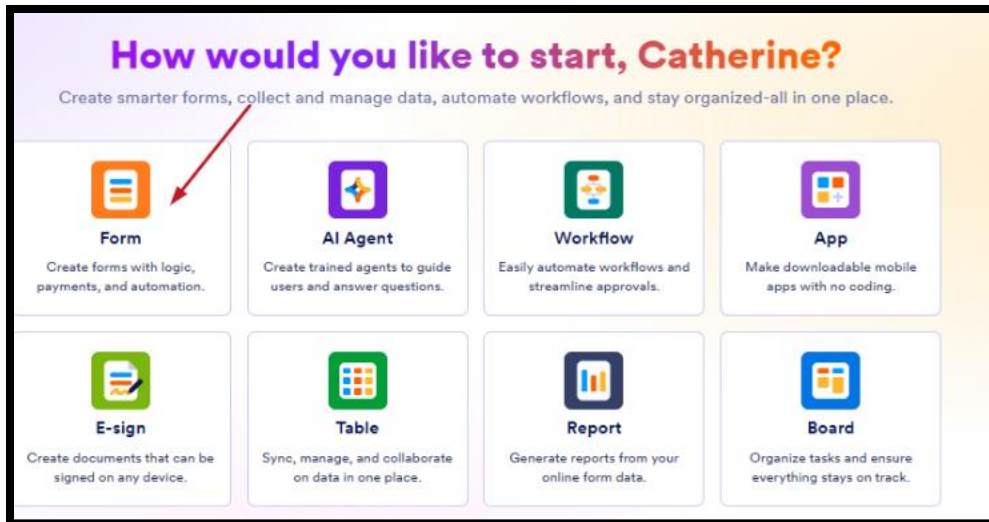


Step 2: Using this [link](#) create your form from the following steps

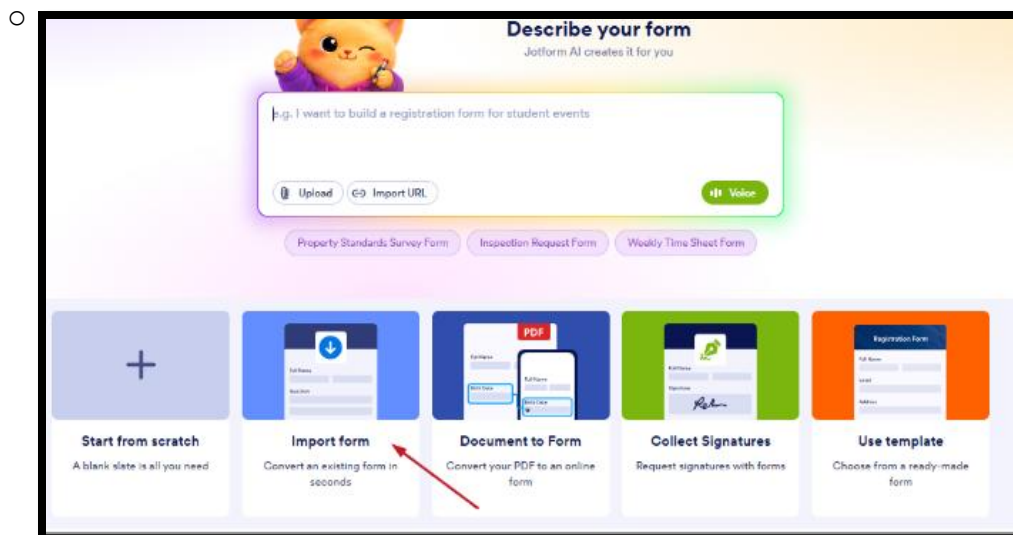
- Click **Create**



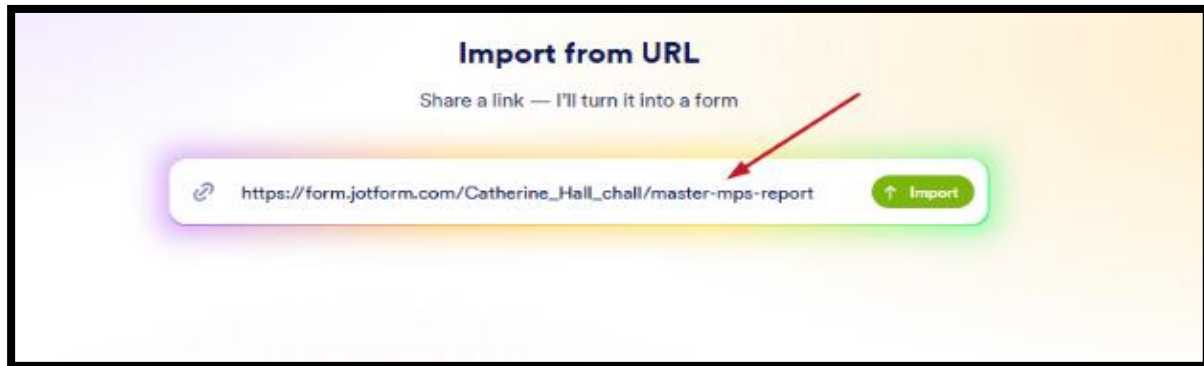
- Select: Form



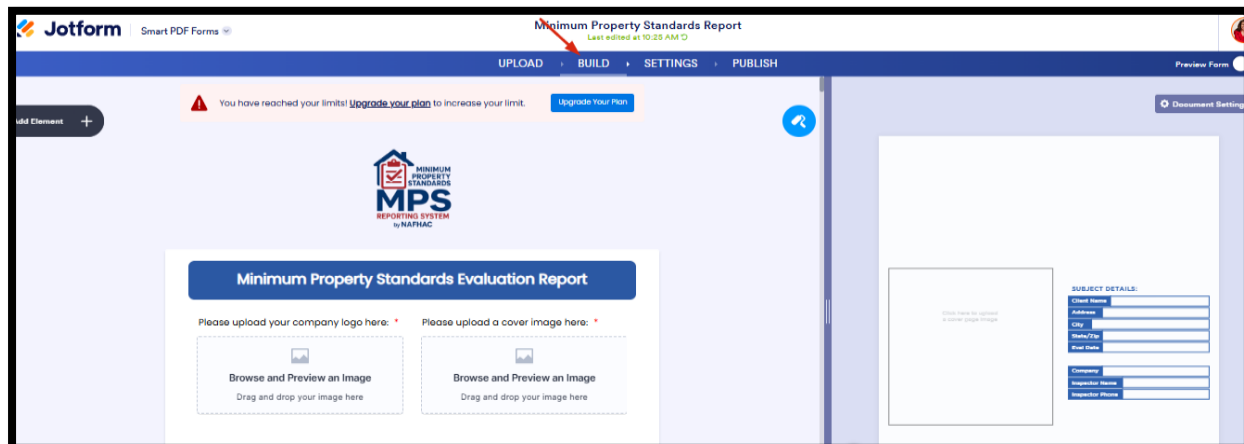
- Select: Import form



Select: Import from URL

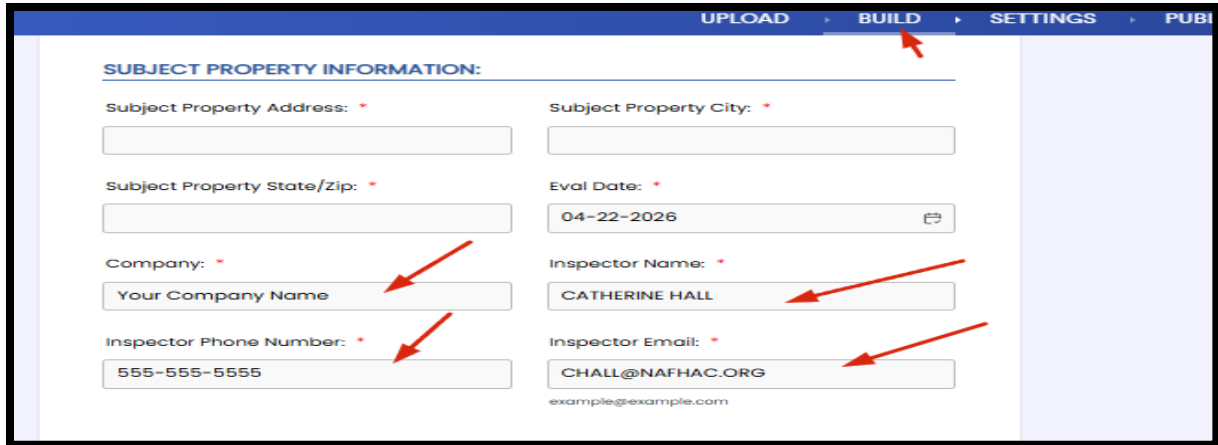


- Enter this URL link https://form.jotform.com/Catherine_Hall_chall/master-mps-report
- Hit -IMPORT
 - The MPS report will appear in the BUILD Stage



Step 3: Set Default Inspector Information

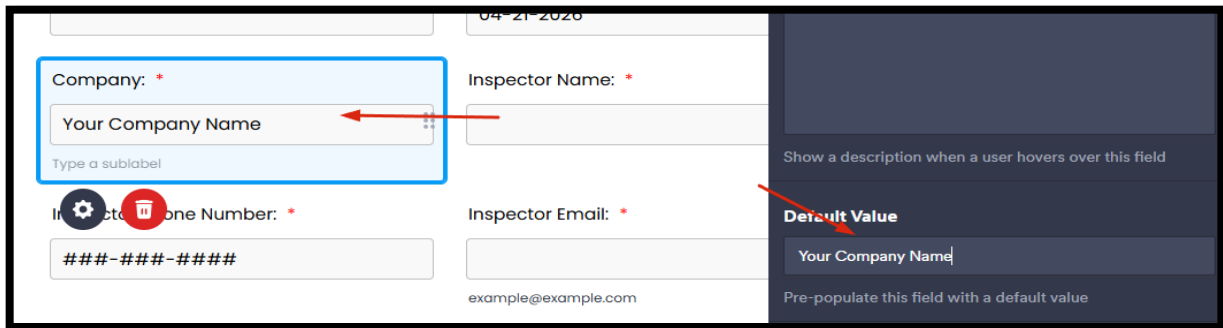
- Now you need to add your default information for the following fields: Company, Inspector Name (if only one person will use the system), Inspector Phone Number, Inspector Email.



The screenshot shows the 'BUILD' tab in the settings menu. Under 'SUBJECT PROPERTY INFORMATION:', there are several input fields. Red arrows point to the 'Company' field (containing 'Your Company Name'), 'Inspector Name' field (containing 'CATHERINE HALL'), 'Inspector Phone Number' field (containing '555-555-5555'), and 'Inspector Email' field (containing 'CHALL@NAFHAC.ORG').

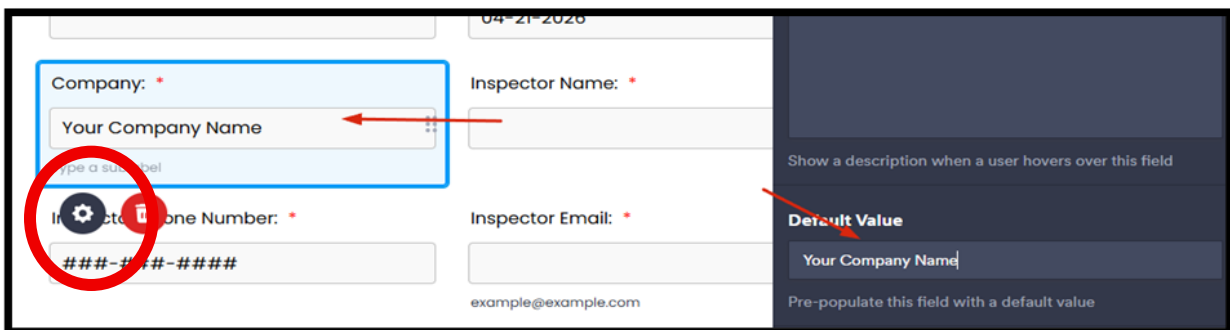
○ REPEAT this same process FOR ALL FOUR FIELDS

1. Move your mouse over the field then click it



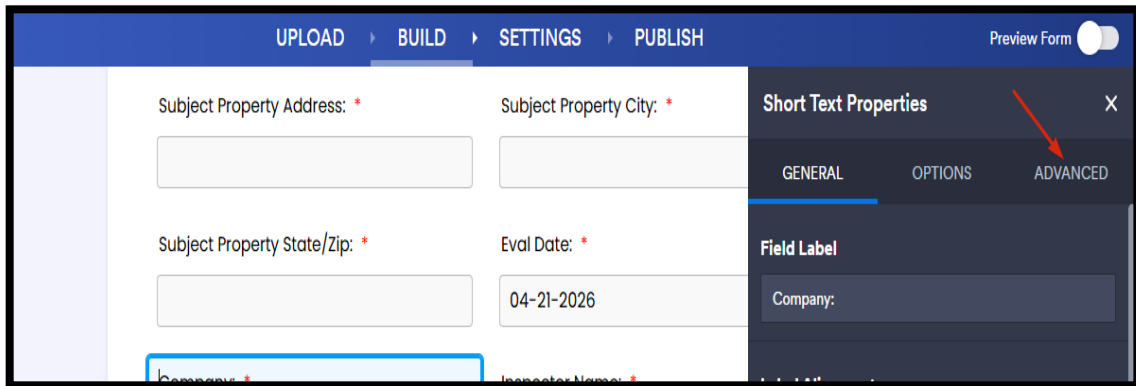
This screenshot shows the 'Company' field selected with a blue border. A red arrow points to the field. To the right, a dropdown menu is open, showing 'Default Value' with 'Your Company Name' selected. Below the dropdown, it says 'Pre-populate this field with a default value'. A gear icon for settings is visible in the bottom left of the form area.

2. A blue box will appear around the field
3. CAUTION- DO NOT HIT THE "Remove from PDF" button.
4. Click the black PROPERTIES Gear



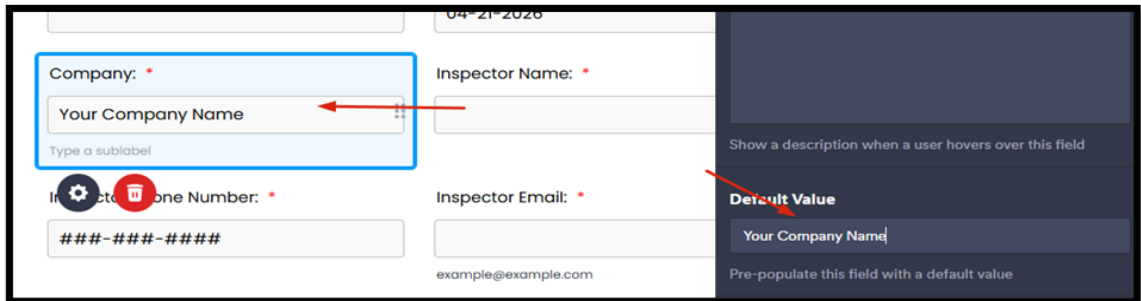
This screenshot is similar to the previous one, but the gear icon in the bottom left of the form area is circled in red, indicating it should be clicked. The 'Default Value' dropdown menu is still open, showing 'Your Company Name' as the selected option.

5. Go to the Advanced Tab



The screenshot shows a web interface with a top navigation bar containing 'UPLOAD', 'BUILD', 'SETTINGS', and 'PUBLISH'. A 'Preview Form' toggle is in the top right. The main content area has several input fields: 'Subject Property Address', 'Subject Property City', 'Subject Property State/Zip', and 'Eval Date' (with the value '04-21-2026'). A sidebar on the right is titled 'Short Text Properties' and has three tabs: 'GENERAL', 'OPTIONS', and 'ADVANCED'. The 'ADVANCED' tab is selected, and a red arrow points to it. Below the tabs, there is a 'Field Label' section with the text 'Company:'.

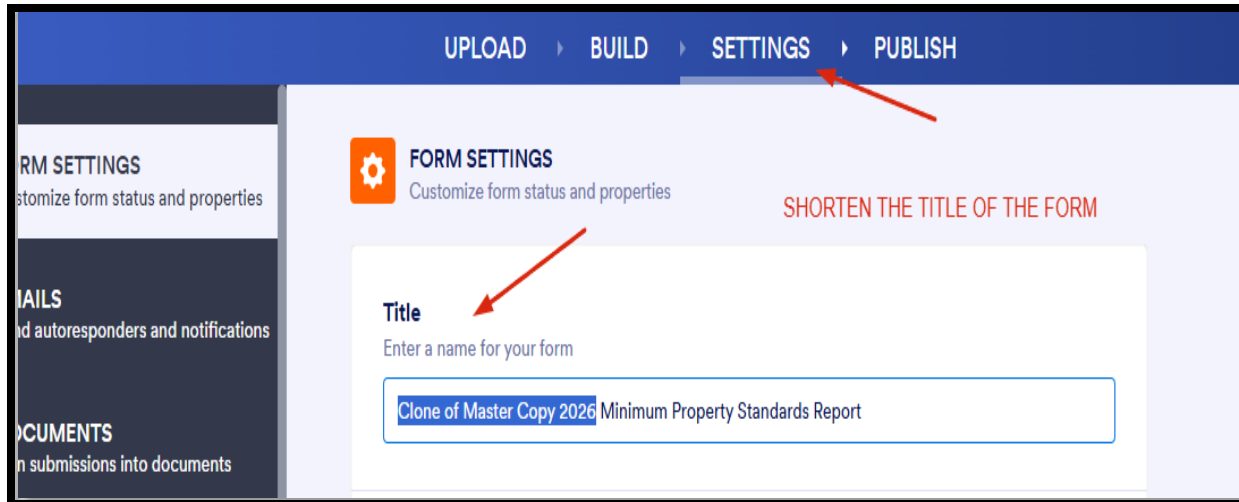
6. Scroll down to “Default Value” and Enter the required information that will appear on every report.



This screenshot is a zoomed-in view of the 'Company' field. The input field contains 'Your Company Name' and has a blue border. A red arrow points to the field. Below the input field is a 'Default Value' section. The 'Default Value' section has a red arrow pointing to it and contains the text 'Your Company Name' and the instruction 'Pre-populate this field with a default value'. Other fields visible include 'Inspector Name', 'Inspector Email' (with the value 'example@example.com'), and a 'Phone Number' field with a mask '###-###-####'.

Step 4a: Update Form Settings

- Edit the Settings for report delivery



UPLOAD ▸ BUILD ▸ **SETTINGS** ▸ PUBLISH

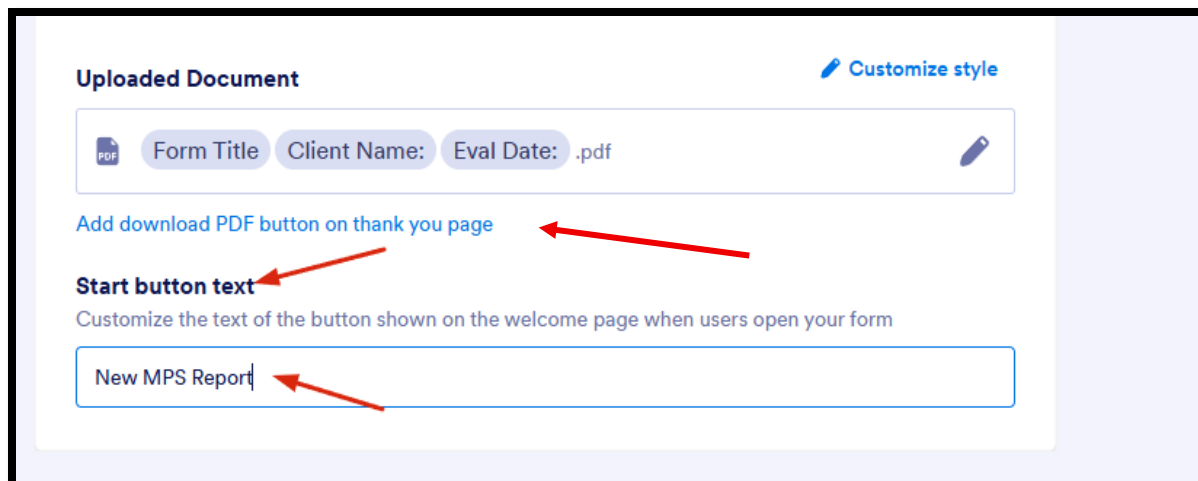
FORM SETTINGS
Customize form status and properties

SHORTEN THE TITLE OF THE FORM

Title
Enter a name for your form

Clone of Master Copy 2026 Minimum Property Standards Report

- Title: Change the title of the Report (remove Clone of Master Copy 2026)
- Verify the PDF download button will appear on the Thank You Page by clicking the blue phrase: [Add download PDF button on thank](#)
- **OPTIONAL: Start button text** : Change the text on the Welcome Page from: Start Filling – to – [New MPS Report](#)



Uploaded Document [Customize style](#)

PDF Form Title Client Name: Eval Date: .pdf

[Add download PDF button on thank you page](#)

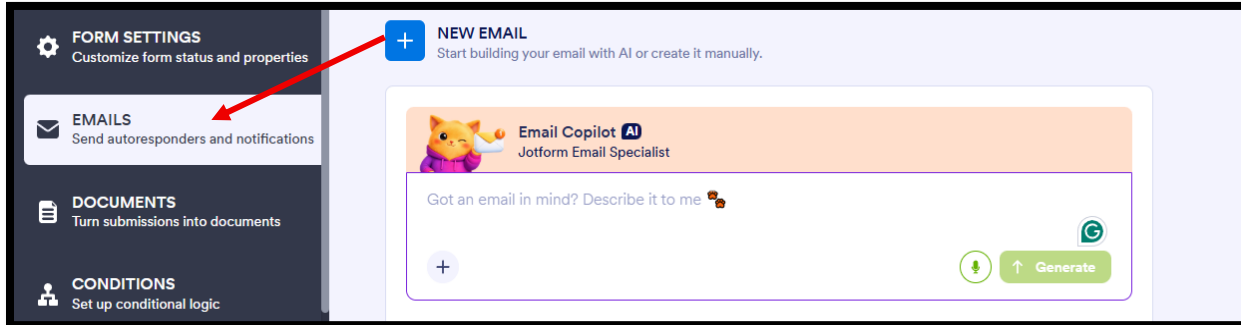
Start button text
Customize the text of the button shown on the welcome page when users open your form

New MPS Report

Step 4b: Set Up Email Notifications

(Adding autoresponder and notification emails)

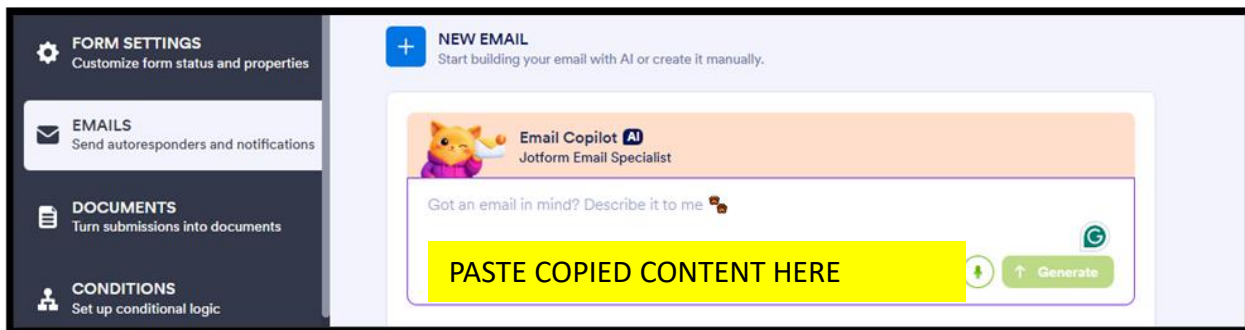
- EMAILS – create your custom autoresponder and report submission emails
 - Click the option “EMAILS” from the side bar



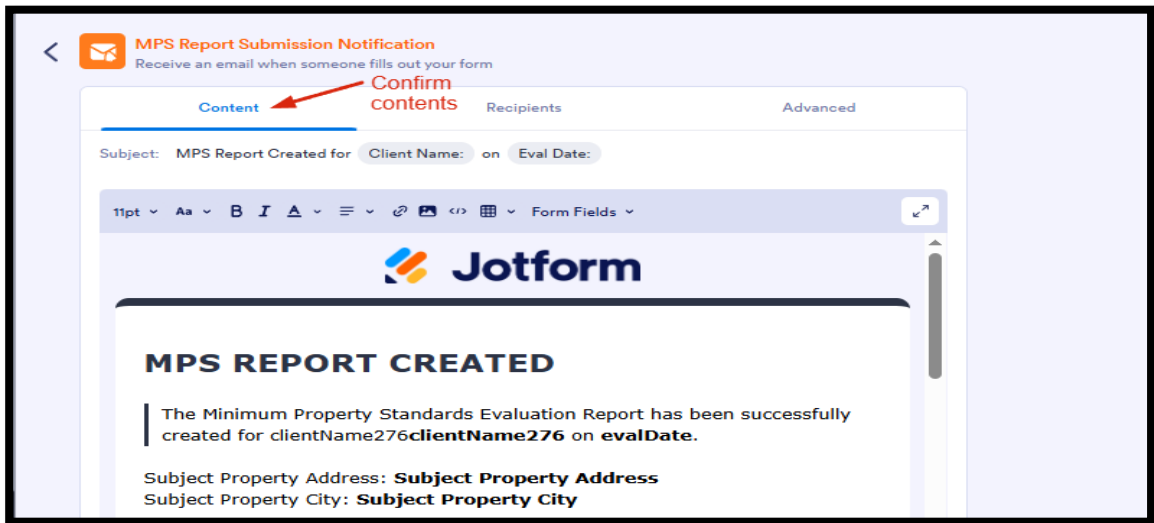
- Create the notification email from the Email Copilot AI with this prompt

AUTORESPONDER 1 PROMPT: (copy entire content)

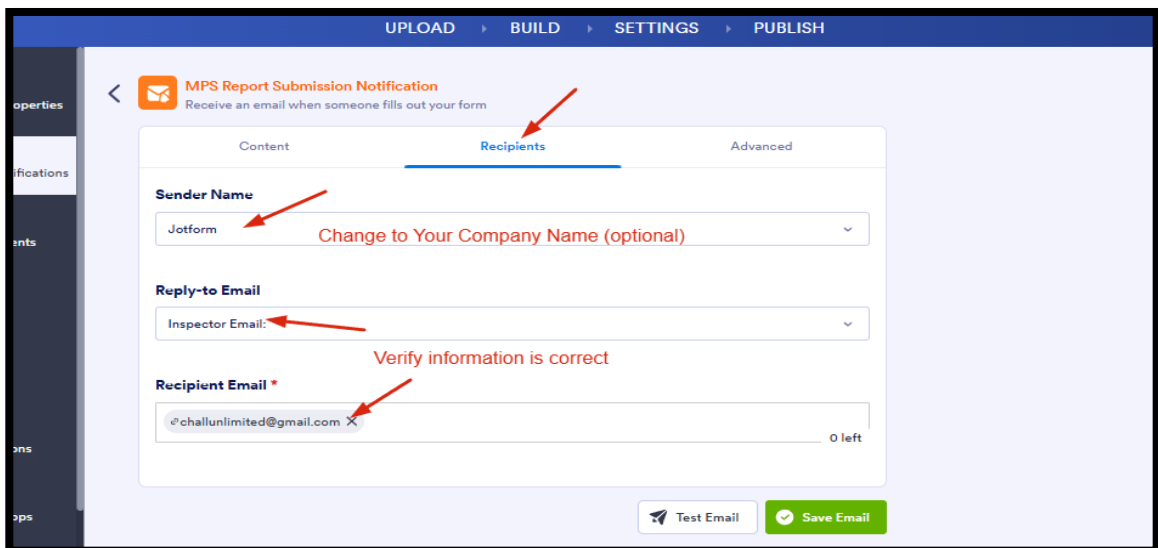
Create a notification email that will be sent to the Inspector upon submission of the form. It will include a message that the MPS Report has been created for Client Name on Eval Date. The email should include the Client name, Subject Property Address, Subject Property City and indicate that the PDF of the report is attached to the email. The email recipient should be the Inspector Email. The Settings should include the PDF attached with the Original Form with submission data included



- Confirm **contents** are as you would like to receive in the email

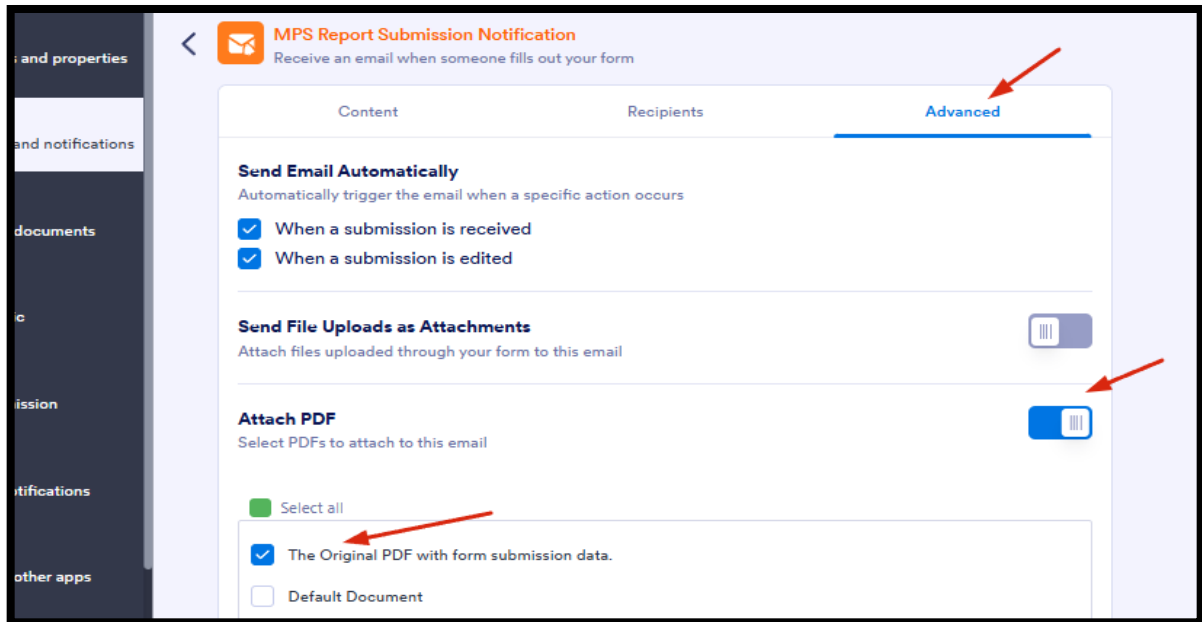


- Click the **Recipients** Tab:

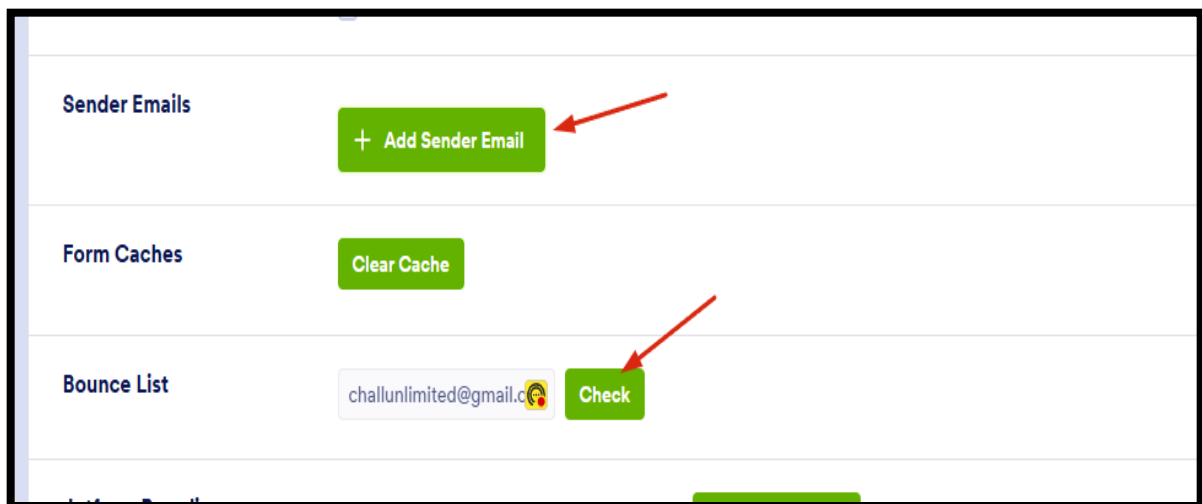


- Change the Sender Name: to YOUR Company Name (optional) existing sender name is JotForm.
- You would select the macro 'Company:' from the dropdown menu.
- Verify Reply-to Email is 'Inspector Email:' macro
- Recipient Email should be your account email address

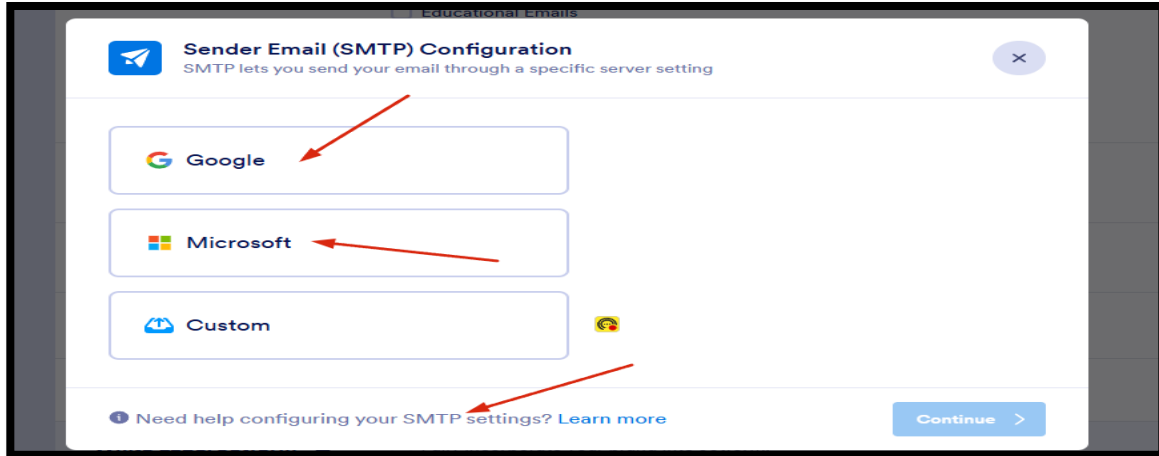
- **Click to the Advanced tab**
- Confirm the **Attach PDF** box is blue (on)
- Confirm **“The Original PDF with Form submission data”** box is checked



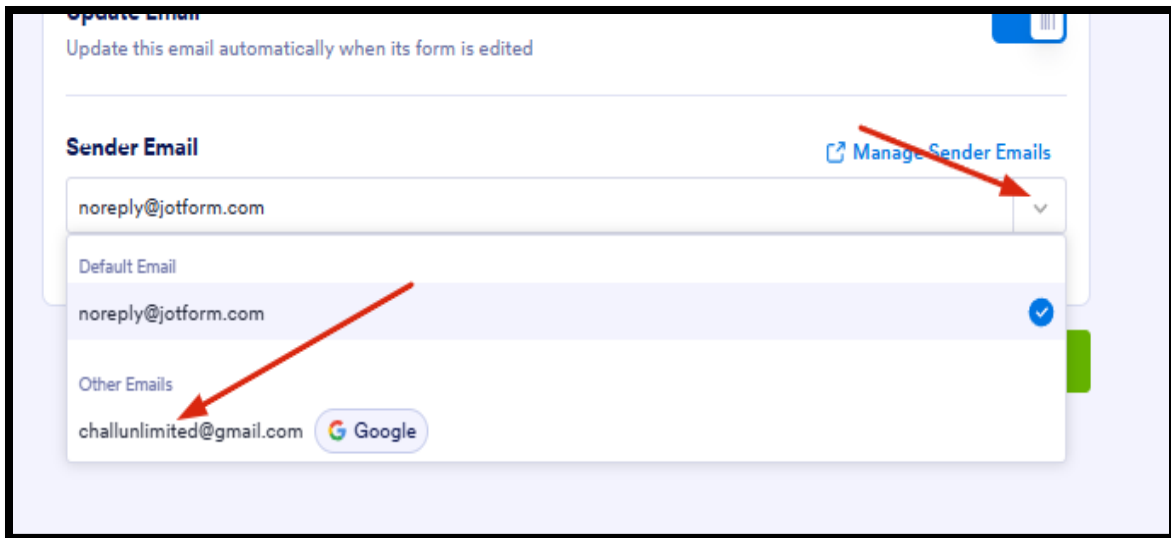
- Edit the Sender Email (from noreply@jotform.com)
 - Scroll down on the page and click the **+Add Sender Email** button



- This will require updating your Settings and works best with Google or Microsoft Emails



- Help text available on the page
- After you update your Send email address return to the Advanced Tab and change the sender email address to your email address. **It may require you to log out and back in to re-populate the field option.**



Autoresponder 2 PROMPT

(Notification email with report for client delivery)

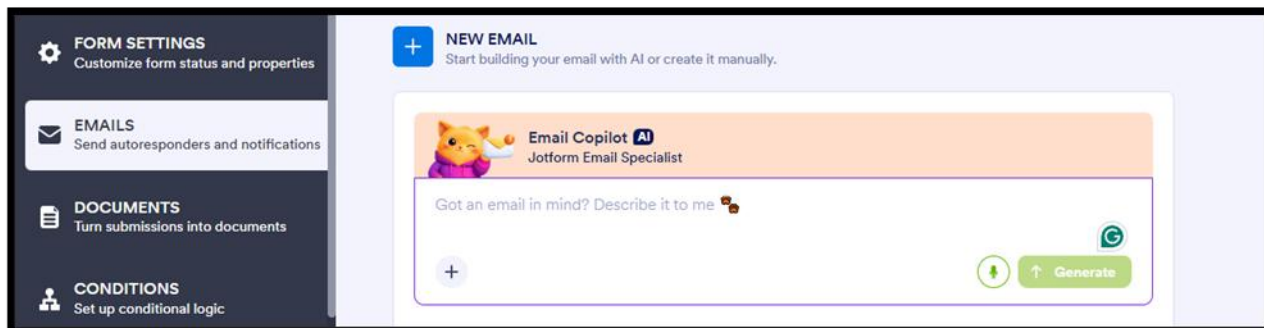
Create an autoresponder notification email that will be sent to the Client upon submission of the form. It will include a message that the MPS Report has been created for the Subject Property Address, Subject Property City, Subject Property State/Zip on Eval Date. It should thank them for their business and let them know that we are here to answer any questions or offer additional support.

The email should include the Client name, Subject Property Address, Subject Property City and indicate that the PDF of the report is attached to the email.

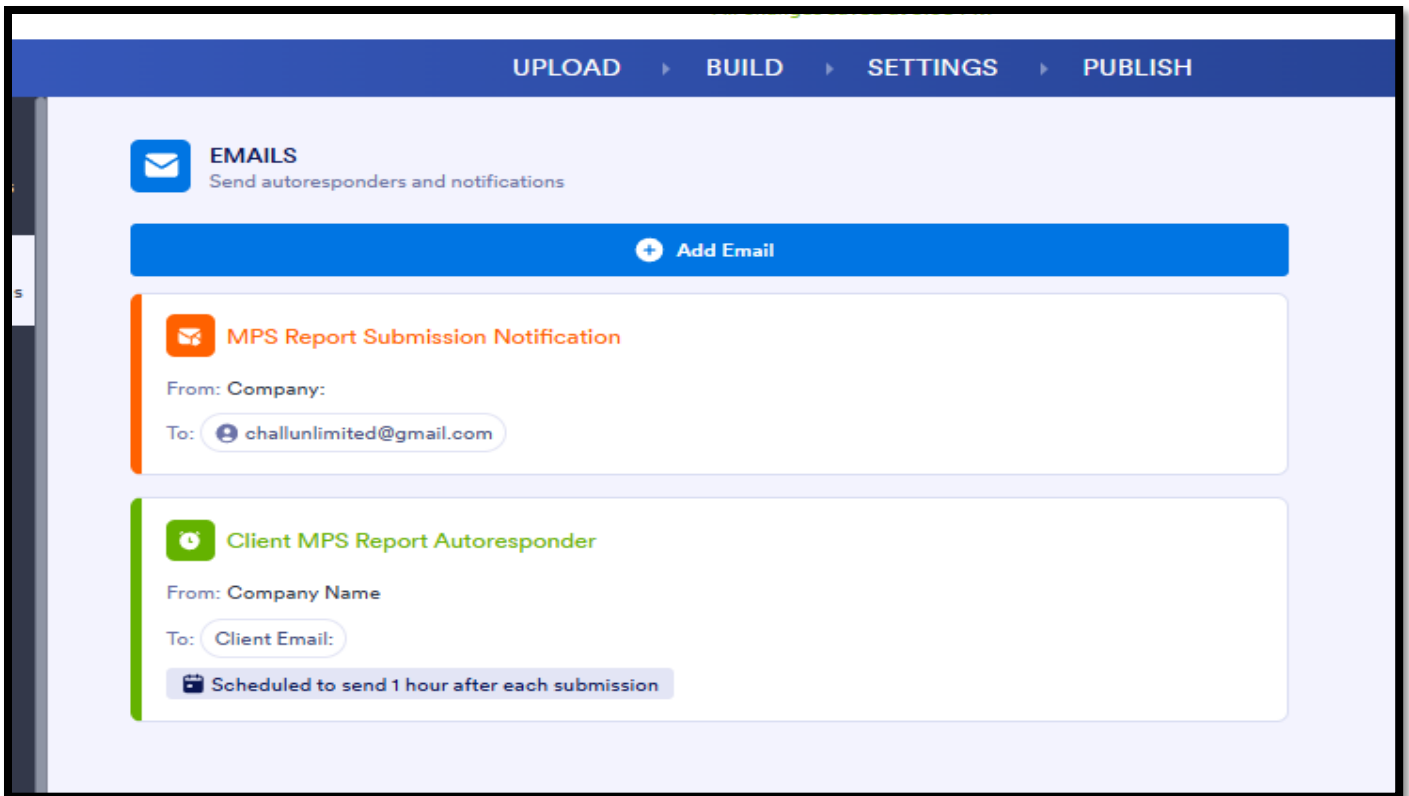
The email recipient should be the Client Email:

The Settings should include the PDF attached with the Original Form with submission data included

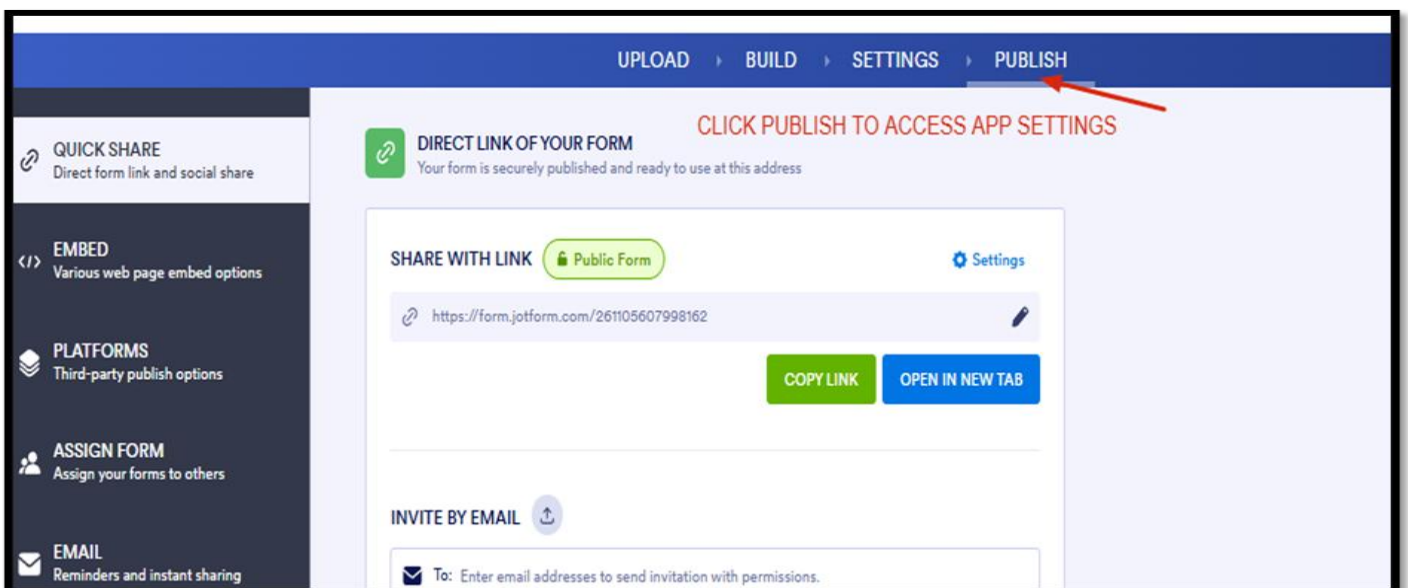
PASTE COPIED CONTENT HERE INSIDE COPILOT BOX



- When both autoresponder emails are created it should look like this in the Emails Section

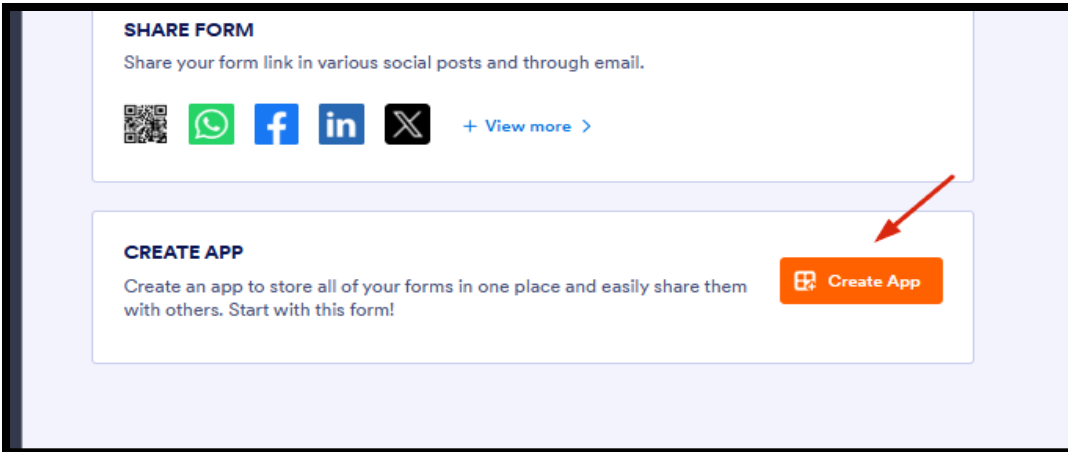


- Once you are finished with settings click the **PUBLISH BUTTON**

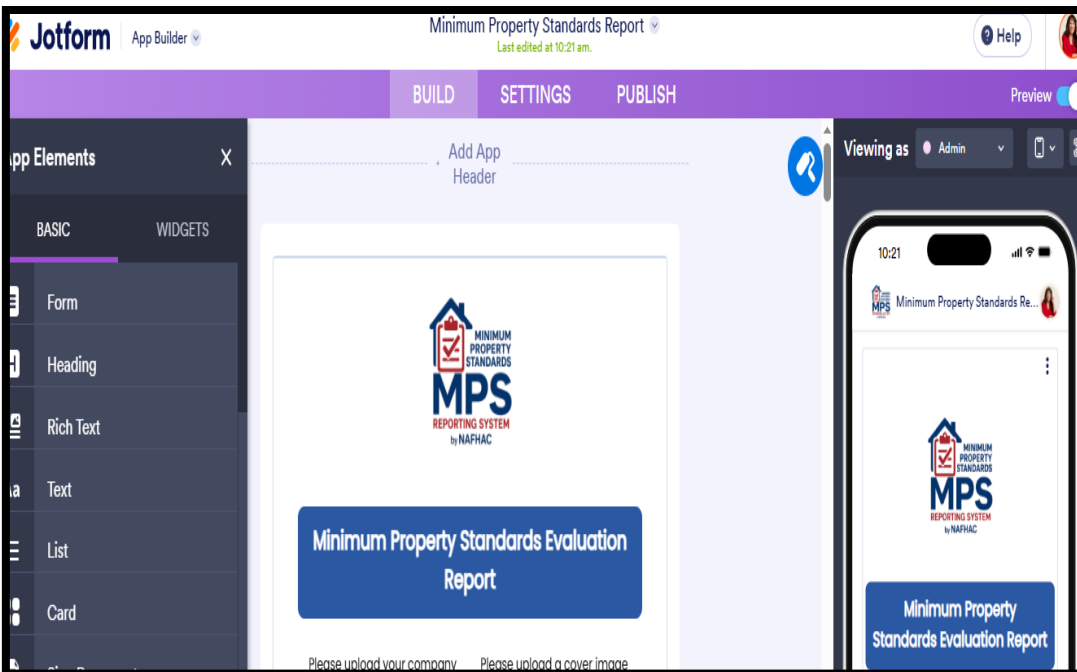


STEP 5: CREATING MOBILE APPLICATION

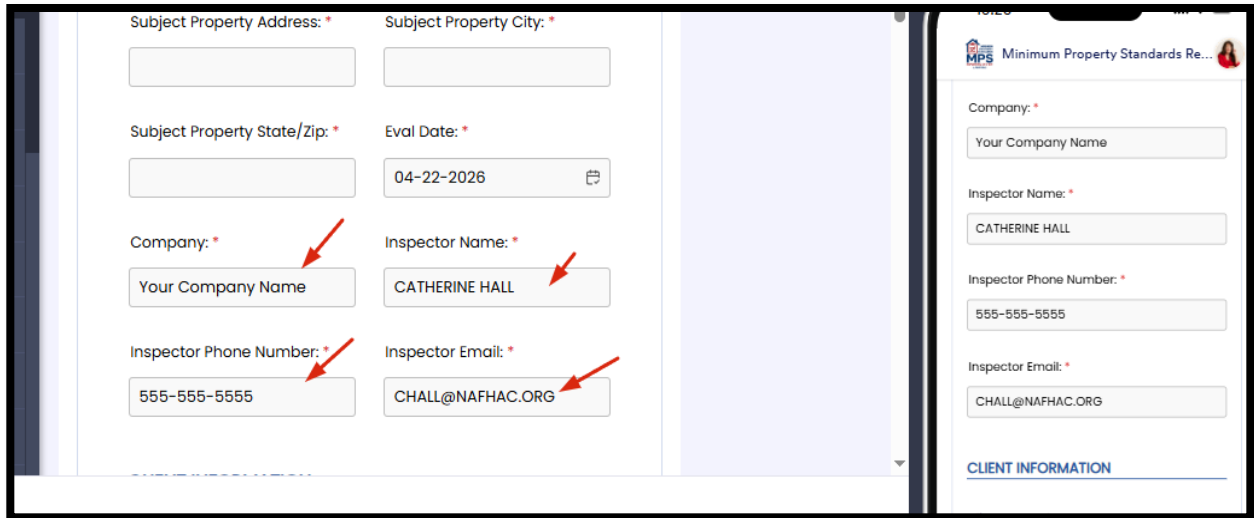
1. Scroll down to Create App Button



2. App Builder page will open (give it a few seconds to load the MPS system)



- From the BUILD tab: Confirm all settings are accurate:
 - Default information



Subject Property Address: * Subject Property City: *

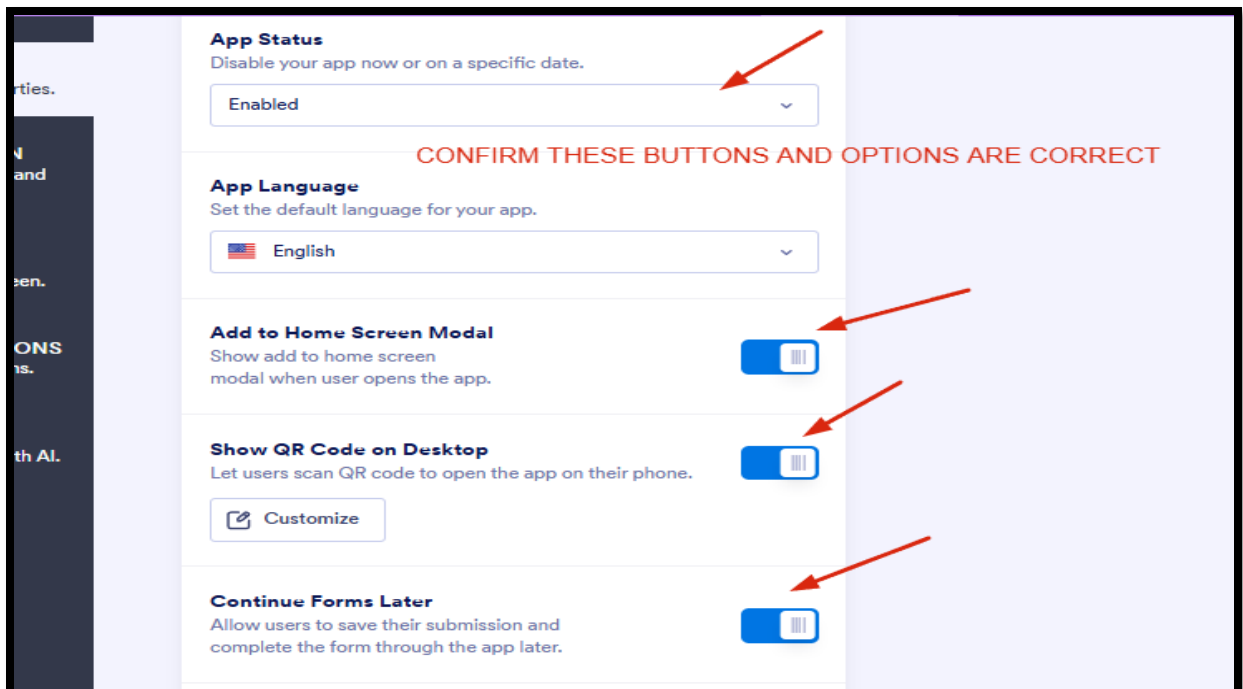
Subject Property State/Zip: * Eval Date: *

Company: * Inspector Name: *

Inspector Phone Number: * Inspector Email: *

CLIENT INFORMATION

- DO NOT CHANGE ANY OTHER SETTINGS OR YOU MAY CORRUPT THE ENTIRE SYSTEM**
- No SETTING CHANGES ARE NEEDED (Confirm the screen appears as below)**



App Status
Disable your app now or on a specific date.

App Language
Set the default language for your app.

Add to Home Screen Modal
Show add to home screen modal when user opens the app.

Show QR Code on Desktop
Let users scan QR code to open the app on their phone.

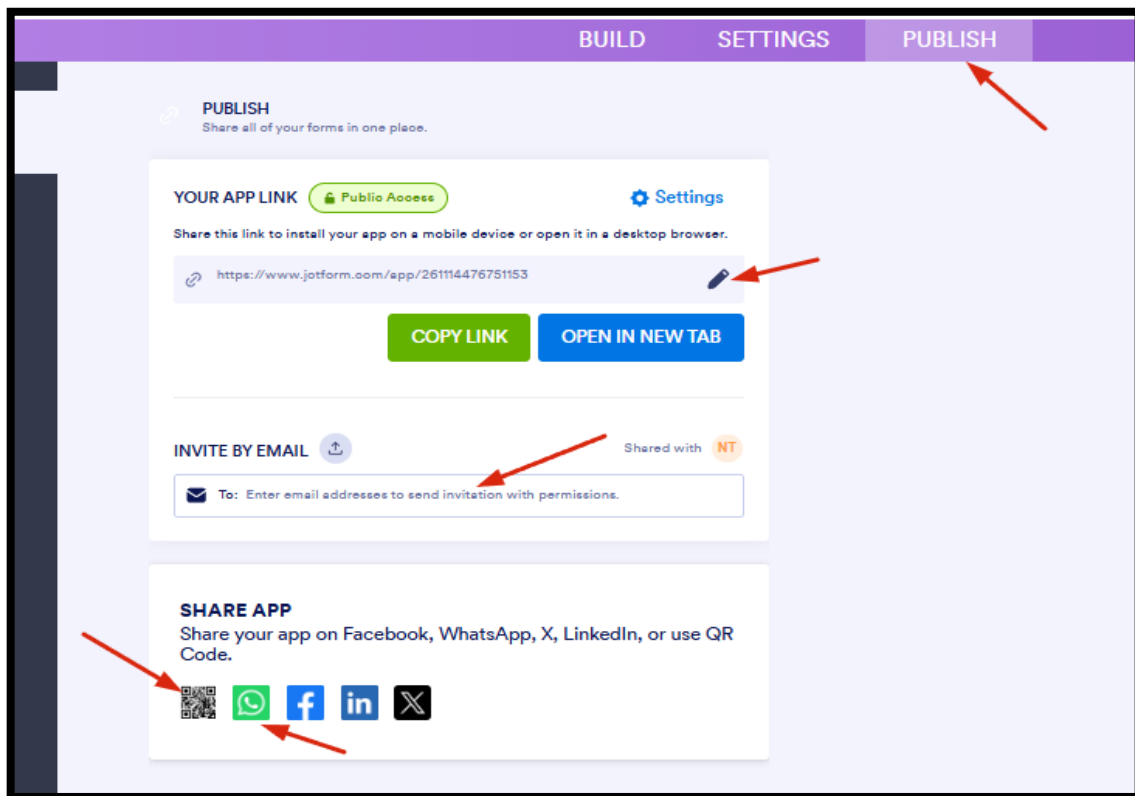
Continue Forms Later
Allow users to save their submission and complete the form through the app later.

CONFIRM THESE BUTTONS AND OPTIONS ARE CORRECT

- Proceed to **PUBLISH** tab

Step 6: Access and Use the Form

- a. From here you can either:
 - i. copy the link and paste it into an email that you will open from your mobile device
 - ii. Invite by email (add your email address) and send to email you can open from your mobile device
 - iii. If using email- open mobile device and follow instructions from inside email.



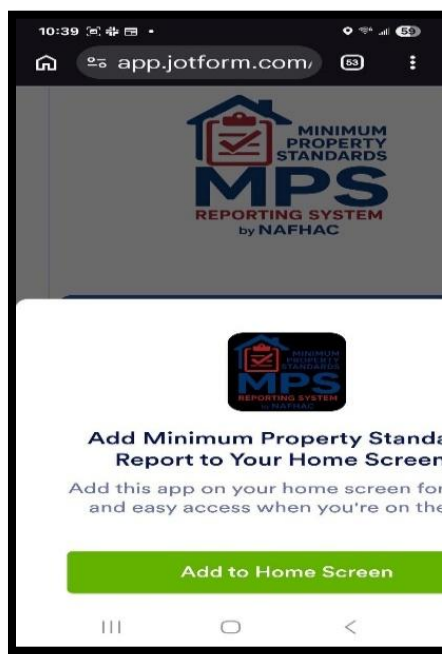
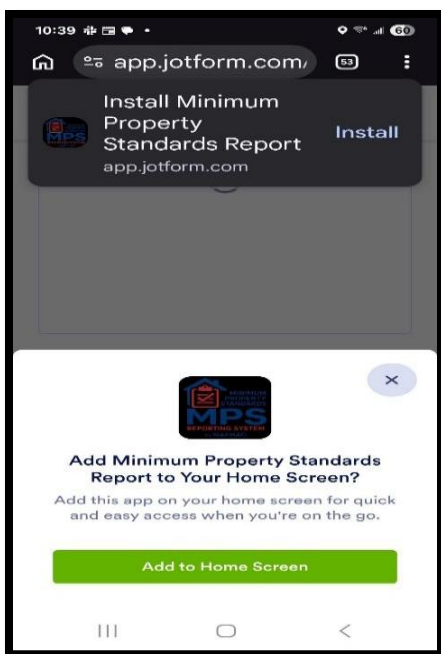
- b. Click the link to open from either QR code or WhatsApp link.

c. If using QR code follow the instructions on the screen as below:



d. Follow instructions on mobile device for adding the app to your home screen

e. Open the app and use.



FAQ's & Troubleshooting Tips

FREQUENTLY ASKED QUESTIONS (FAQs)

Q1: Who should receive the MPS report email?

✓ Answer:

The report should be sent to the CLIENT'S email address.

Make sure the "Client Email" field is set to the Client Email — not your own email.

IMPORTANT:

Incorrect recipient settings are the #1 reason reports are not delivered.

Q2: Why is my client not receiving the report?

✓ Answer:

Please verify the following:

- Recipient Email is set correctly
- Autoresponder email is enabled
- PDF attachment is turned ON

TIP:

Ask your client to check their spam or junk folder if the email is not found.

Q3: Can I delay sending the report to the client?

✓ Answer:

Yes. You can delay the email (e.g., 1 hour) before sending.

TIP:

This gives you time to review the report for accuracy before it is delivered.

Q4: How many emails should be set up?

✓ Answer:

You only need TWO emails:

1. Inspector Notification Email
2. Client Autoresponder Email

Q5: Can I customize the email message?

✓ Answer:

Yes. You can edit the email content using Email Copilot or manually.

Just make sure all required details and the PDF attachment are included.

TROUBLESHOOTING TIPS

! ISSUE: PDF report is not attached to the email

✓ SOLUTION:

- Go to Emails → Advanced tab
- Turn ON “Attach PDF”
- Select “Original PDF with submission data”

! ISSUE: Sender email shows Jotform default (noreply@jotform.com)

✓ SOLUTION:

- Go to Emails → Advanced tab
- Update the Sender Email to your email address
- Add your email if needed
- Save changes and refresh (log out/in if necessary)

! ISSUE: Client is not receiving the email

✓ SOLUTION:

- Verify Recipient Email is set to Client Email
- Check spam/junk folder
- Confirm autoresponder is active
- Ensure all email settings are saved properly

⚠ WARNING:

Do NOT leave the recipient email as your own email.

! ISSUE: Company or Inspector details are missing in the report

✓ SOLUTION:

- Set Default Values for all required fields:
 - Company Name
 - Inspector Name
 - Phone Number
 - Email
- Go to Properties → Advanced → Default Value

! ISSUE: Report contains errors or missing information

✓ SOLUTION:

- Use the email delay feature (recommended: 1 hour)
- Review submission before sending
- Double-check all entries before final submission