

Pre-Installation Survey — User Guide

V1 - Oct 14, 2026

Overview

The Pre-Installation Survey is a checklist that four people complete in turn, with an email at every hand-off. The Service Coordinator gives the final approval, and the signed PDF is emailed to everyone involved.

Step	Who	What they do	Status shown
1	Sales Rep	Starts the survey: customer, address, contact and equipment. Picks the Service Coordinator.	Sales Rep
2	Service Coordinator	Adds SO #, WO #, Zoho #, survey date. Can correct the Sales Rep's part. Sends the customer a private link.	Coordinator Prep
3	Customer	Opens the link from the email, fills in the site details (rooms, schedule, delivery, network) and signs.	Waiting on Customer
3b	IT Reviewer (digital equipment only)	Checks the Network and IT Requirements and signs off, or returns it to the customer.	Ready for Approval — Waiting on IT review
4	Service Coordinator	Reviews everything, signs and approves (after IT sign-off when needed). The final PDF is emailed. Or sends it back to the customer with a note.	Ready for Approval → Approved

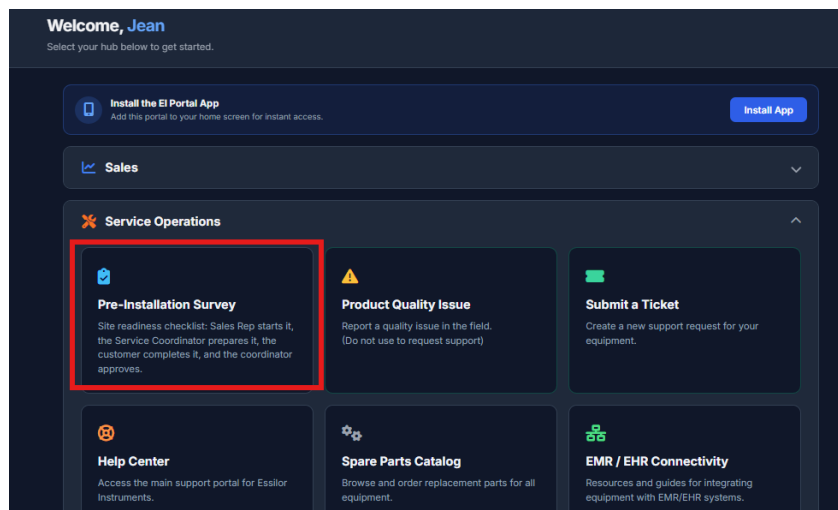
Every save, hand-off and email is recorded in the survey's **History**, with who did it and when.

The screenshots in this guide come from a test copy of the app running the same code as the live site. The company, customer and Sales Rep names are sample data.

Getting access

Staff use their normal **EI Portal** account; there is no separate password. Customers never sign in: they use the private link in their email.

1. Sign in to the EI Portal.
2. Open **Service Operations** and click **Pre-Installation Survey**.
3. The survey dashboard opens directly. If your portal session has ended, you are sent to the portal sign-in page first.



What each person can do is set by an admin in the admin page, in the **Pre-Install** column:

Pre-Install level	Can open the card	What they can do
0 – None	No (card stays locked)	Nothing
1 – Sales Rep (default for everyone)	Yes	Create surveys, fill Customer & Site and Equipment, send to a coordinator
2 – Service Coordinator	Yes	Prepare surveys, send them to customers, review and approve
3 – Admin	Yes	Everything above, on every survey, including the IT sign-off
4 – IT Reviewer	Yes	Sign off the Network and IT Requirements on surveys with digital equipment, or return them to the customer

Only people set to **Service Coordinator** or **Admin** appear in the coordinator list when a Sales Rep sends a survey.

A portal session lasts one day, and signing in on another device signs you out of the first one. If the app sends you to the sign-in page, simply sign in again.



The dashboard

The dashboard lists every survey you can see; **Needs my action** shows only the ones waiting on you.

COMPANY	STATUS	SO # / WO #	ZOH0 #	INSTALL DATE	SALES REP	COORDINATOR	LAST CHANGE
Bright Eyes Optometry drlee@example.com	APPROVED	SO SO-4471 WO WO-88	ZH-1025	Nov 2, 2026	Sam Rivera	Angela Arcand (you)	Oct 14, 2026, 8:57 AM

- **Tabs** filter by step: Sales Rep, Coordinator Prep, Waiting on Customer, Ready for Approval, Approved, Cancelled. The number on each tab is how many surveys it holds.
- **Search** finds a survey by company, SO #, WO #, Zoho # or email. The Zoho # entered by the coordinator also shows as its own column.
- **+ New Survey** starts a survey (Sales Reps and Admins).
- Click any row to open the survey.
- **← El Portal** goes back to the portal; **Sign out** signs you out of the portal too.

Your name and role show at the top right.

Step 1 — Sales Rep starts the survey

The Sales Rep fills in two sections, then sends the survey to the Service Coordinator they choose.

1. On the dashboard, click **+ New Survey**.
2. Fill in **Customer & Site Information**. Fields with a red * are required. The **Contact Email** matters most: the customer's checklist link goes there. On site, **Onsite** fills the address from your location.

ESSILOR INSTRUMENTS USA

PRE-INSTALLATION SITE READINESS CHECKLIST

To help ensure your installation is completed safely and efficiently, please review and complete the following checklist before your scheduled installation date.

CUSTOMER & SITE INFORMATION

COMPANY / PRACTICE NAME *
Bright Eyes Optometry

DELIVERY ADDRESS *
100 Main St, Fort Worth, TX 76102 [Onsite](#)

CONTACT NAME *
Dr. Jamie Lee

CONTACT PHONE
817-555-0100

CONTACT EMAIL (the customer's checklist link is sent here) *
drlee@example.com

Save Saved 8:16 AM **Cancel survey** **Send to Service Coordinator**

3. Tick every item in **Equipment to be Installed** (at least one).

EQUIPMENT TO BE INSTALLED
YOUR SECTION

Select all ophthalmic instruments and accessories scheduled for delivery and setup:

☒ Examination Chair	☐ Instrument Stand
☒ Slit Lamp	☐ Applanation Tonometer
☐ Non-Contact Tonometer (NCT)	☐ Automated Perimeter / Visual Field
☐ Manual Phoropter	☒ Digital Phoropter
☐ AutoRefractor / Keratometer	☐ Keratometer (Manual)
☐ Manual Lensometer	☐ Digital Lensometer
☐ Hand Held Scopes	☐ Acuity Chart / Projector
☐ Binocular Indirect (BIO)	☐ Trial Frame

Save
Saved 8:16 AM
Cancel survey
Send to Service Coordinator

4. Click **Save** at any time. Changes also save automatically every 45 seconds.
5. Click **Send to Service Coordinator**, choose the coordinator, add an optional note and click **Send**.

Send to a Service Coordinator

The coordinator you choose gets an email (with Alicia Anselmo copied). After sending, you can no longer change this survey unless the coordinator returns it to you.

SERVICE COORDINATOR

Angela Arcand

NOTE FOR THE COORDINATOR (OPTIONAL)

Customer wants the install before Thanksgiving.

Go back
Send

After sending, the Sales Rep's fields lock. The Sales Rep can still open the survey to follow its progress, and gets a copy of the final approval email.

Email sent: the chosen coordinator receives this, with Alicia Anselmo (manager) on copy. Replying goes to the Sales Rep.



New pre-installation survey: Bright Eyes Optometry

From Essilor Instruments USA <notification@essilorinstrumentsusa.kpidomain.com>
To Angela Arcand <Angela.Vaughan@essilorinstrumentsusa.com>
Cc Alicia Anselmo <aanselmo@essilorinstrumentsusa.com>
Reply-To Sam Rivera <rep@essilorinstrumentsusa.com>

Essilor Instruments USA

New pre-installation survey

Hello Angela Arcand,

Sam Rivera assigned you a new pre-installation survey for **Bright Eyes Optometry**.

Note:
Customer wants the install before Thanksgiving.

[Open the survey](#)

If the button does not work, copy this address into your browser:
https://essilorinstrumentsusa.kpidomain.com/Service%20Hub/pre-install-survey/pre_install_survey.html?id=9f903b89419dae12d29eb7884653c6f0

Essilor Instruments USA - Pre-Installation Site Readiness

Step 2 — Service Coordinator prepares it

The coordinator adds the order references and sends the customer a private link.

1. Open the survey from the email's **Open the survey** button, or from **Needs my action** on the dashboard.

The screenshot shows the 'Pre-Installation Surveys' dashboard for Angela Arcand. It features a search bar and a table with columns: COMPANY, STATUS, SO # / WO #, INSTALL DATE, SALES REP, COORDINATOR, and LAST CHANGE. A single survey entry for 'Bright Eyes Optometry' is listed with status 'COORDINATOR PREP' and coordinator 'Angela Arcand (you)'.

COMPANY	STATUS	SO # / WO #	INSTALL DATE	SALES REP	COORDINATOR	LAST CHANGE
Bright Eyes Optometry drlee@example.com	COORDINATOR PREP	—	—	Sam Rivera	Angela Arcand (you)	Oct 14, 2026, 8:16 AM

2. Fill in **Reference & Logistics**: Sales Order #, Work Order #, Zoho #, survey date and time. The Service Coordinator is pre-selected as you; change it if someone else will handle the survey.

The screenshot shows the 'REFERENCE & LOGISTICS' form. It contains the following fields: SALES ORDER # (SO-4471), WORK ORDER (WO) # (WO-88), Zoho # (ZH-1025), SURVEY DATE & TIME (10/14/2026, 08:30 AM), SERVICE COORDINATOR (Angela Arcand), and SERVICE COORDINATOR EMAIL (Angela.Vaughan@essilorinstrumentsusa.com).

3. If anything from the Sales Rep changed (address, contact, equipment), correct it here. Those fields stay open for the coordinator, and every change is recorded in History.
4. Click **Send to Customer** and confirm.

Send the checklist to the customer?

A private link is emailed to drlee@example.com. Replies to that email come to the assigned Service Coordinator.

Go backSend to customer

Other buttons at this step: **Return to Sales Rep** (with a required note saying what to fix) and **Cancel survey** (with a required reason).

Email sent: the customer's contact email receives a private link that works for 30 days. Replying goes to the coordinator.

Action needed: pre-installation checklist for Bright Eyes Optometry

From Essilor Instruments USA <notification@essilorinstrumentsusa.kpidomain.com>
To Dr. Jamie Lee <drlee@example.com>
Reply-To Angela Arcand <Angela.Vaughan@essilorinstrumentsusa.com>

Essilor Instruments USA

Pre-installation checklist

Hello Dr. Jamie Lee,

To help make sure your installation goes smoothly, please complete the pre-installation site readiness checklist for **Bright Eyes Optometry** before your installation date.

Open the checklist

If the button does not work, copy this address into your browser:
https://essilorinstrumentsusa.kpidomain.com/Service%20Hub/pre-install-survey/pre_install_survey.html?t=qLKwHl8VM2RmJqP8iUt0NcmraUtC0lIE3nbqBRPl8Co

You can save your progress and come back with the same link. This link is personal to you and works until November 13, 2026.

Questions? Contact your Service Coordinator, Angela Arcand, at Angela.Vaughan@essilorinstrumentsusa.com. You can also simply reply to this email.

Essilor Instruments USA - Pre-Installation Site Readiness

While the customer works, the status panel shows when the link was sent, when it expires and whether the customer has opened it.

SALES REP

COORDINATOR

CUSTOMER

APPROVAL

WAITING ON CUSTOMER

History

Download draft PDF

Waiting on the customer to complete the site details and sign.

Link sent to drlee@example.com on Oct 14, 2026, 8:16 AM; works until Nov 13, 2026, 7:16 AM.

The customer has not opened the link yet.

Sales Rep: Sam Rivera · Service Coordinator: Angela Arcand (Angela.Vaughan@essilorinstrumentsusa.com)

Cancel survey

Take back from customer

Email a new link



- **Email a new link** — the customer lost the email or the link expired. Earlier links stop working; their saved answers are kept.
- **Take back from customer** — stops the link and returns the survey to Coordinator Prep, for example when the order or date changes.
- **Cancel survey** — closes it with a required reason; the link stops working.

Step 3 — Customer completes and signs

The customer needs no account: the **Open the checklist** button in their email opens their survey, on a computer or a phone.

1. The top of the page explains what to do. Sections marked **Your section** are theirs; the Sales Rep and coordinator parts are shown read-only.

The screenshot shows a web-based survey form titled "PRE-INSTALLATION SITE READINESS CHECKLIST" from Essilor Instruments USA. At the top, there is a progress bar with four stages: SALES REP, COORDINATOR, CUSTOMER (highlighted in blue), and APPROVAL. Below the progress bar, a status indicator says "WAITING ON CUSTOMER". The main text area contains instructions: "Please complete the sections marked 'Your section' and sign at the bottom. Press Save to keep your progress; you can come back later with the same link. When everything is ready, press 'Submit to Service Coordinator'." It also provides contact information for Angela Arcand, Service Coordinator. Below this is the company logo and the title "PRE-INSTALLATION SITE READINESS CHECKLIST". A sub-header "CUSTOMER & SITE INFORMATION" is followed by a "SALES REP" tab. The form includes input fields for "COMPANY / PRACTICE NAME" (containing "Bright Eyes Optometry") and "DELIVERY ADDRESS". At the bottom, there is a "Save" button with the text "All changes saved" and a blue "Submit to Service Coordinator" button.

2. They fill in the site details: new construction, **Rooms & Lanes** (one card per room, + **Add room**), installation date and time, delivery access, and network/EMR connectivity for digital equipment.

1. ROOM READINESS & PHYSICAL INFRASTRUCTURE

YOUR SECTION

Room: Lane 1

☐ The exam room is cleared of any equipment or items that may interfere with the installation.

WILL EXISTING LANE EQUIPMENT NEED TO BE MOVED OR RELOCATED?

ROOM DIMENSIONS & OPTICAL THROW DISTANCE

ROOM WIDTH (FEET / INCHES)

ROOM LENGTH (FEET / INCHES)

CEILING HEIGHT (FEET)

LANE CHART THROW DISTANCE / SETUP

WALL STRUCTURE & FLOORING SURFACE

WALL CONSTRUCTION (FOR MOUNTS/MIRRORS/BIO)

FLOORING TYPE (CHAIR ANCHOR & LEVELING)

[+ ADD ANOTHER ROOM](#)

3. They sign with a finger or mouse, and type their printed name and title.

CUSTOMER CONFIRMATION & SIGN-OFF

YOUR SECTION

Confirmation Notice: I confirm that the information provided above is accurate and that the installation area will be ready before the technician arrives. I understand that an incomplete room, unavailable equipment, restricted site access, or unavailable IT support may delay the installation or require it to be rescheduled.

CUSTOMER REPRESENTATIVE SIGNATURE *



[Clear signature](#)

CUSTOMER PRINTED NAME *

TITLE



4. **Save** keeps their progress; they can come back later with the same link.
5. **Submit to Service Coordinator** sends it. If something required is missing, the page lists exactly what.

After submitting, the survey locks and they can download a copy as a PDF.

The screenshot shows the 'PRE-INSTALLATION SITE READINESS CHECKLIST' form. It includes a header with the Essilor Instruments USA logo and a title. Below the title is a paragraph explaining the purpose of the checklist. The main section is titled 'CUSTOMER & SITE INFORMATION' and contains several input fields: 'SALES REP', 'COMPANY / PRACTICE NAME' (filled with 'Bright Eyes Optometry'), 'DELIVERY ADDRESS' (filled with '100 Main St, Fort Worth, TX 76102'), 'CONTACT NAME' (filled with 'Dr. Jamie Lee'), 'CONTACT PHONE' (filled with '817-555-0100'), and 'CONTACT EMAIL' (with a note that the customer's checklist link is sent here).

Email sent: the coordinator is told the survey is ready for approval.

The screenshot shows an email notification from Essilor Instruments USA. The subject is 'Ready for approval: Bright Eyes Optometry'. The email body includes the company name, a link to the survey, and a button labeled 'Review the survey'. At the bottom, there is a note about copying the address into a browser if the button does not work, followed by a long URL.

Step 3b — IT Reviewer checks the network (digital equipment only)

When the order includes a **Digital Phoropter**, **Digital Lensometer** or **AutoRefractor**, the IT Reviewer must sign off section 4, Network and IT Requirements, before the coordinator can approve. Orders without that equipment skip this step.



The IT Reviewer is set in the admin page (Pre-Install level **IT Reviewer**). They sign in through the EI Portal like the rest of staff, and can only edit their own card.

Email sent when the customer submits: the IT Reviewer receives “IT review needed”. At the same moment the coordinator receives “Ready for approval”, which says IT must also sign off.

Ready for approval: Bright Eyes Optometry

From Essilor Instruments USA <notification@essilorinstrumentsusa.kpidomain.com>
To Angela Arcand <Angela.Vaughan@essilorinstrumentsusa.com>

Essilor Instruments USA

Customer submitted the checklist

Bright Eyes Optometry submitted their pre-installation checklist. It is ready for your review and approval.

This order includes digital equipment, so the IT Reviewer must also sign off the Network and IT Requirements before you can approve. They have been notified.

[Review the survey](#)

If the button does not work, copy this address into your browser:
https://essilorinstrumentsusa.kpidomain.com/Service%20Hub/pre-install-survey/pre_install_survey.html?id=87dde8d1fc68aaf5698eba90a2d9e076

Essilor Instruments USA - Pre-Installation Site Readiness

IT review needed: Bright Eyes Optometry

From Essilor Instruments USA <notification@essilorinstrumentsusa.kpidomain.com>
To Sharif Elsharkawy <Sharif.Elsharkawy@essilorinstrumentsusa.com>
Reply-To Angela Arcand <Angela.Vaughan@essilorinstrumentsusa.com>

Essilor Instruments USA

Network & IT review needed

Bright Eyes Optometry submitted their pre-installation checklist. The order includes digital equipment, so please review the **Network and IT Requirements** and sign off. The Service Coordinator (Angela Arcand) cannot approve until you do.

If something is missing or wrong, use **Return to Customer** with a note.

[Review the survey](#)

If the button does not work, copy this address into your browser:
https://essilorinstrumentsusa.kpidomain.com/Service%20Hub/pre-install-survey/pre_install_survey.html?id=87dde8d1fc68aaf5698eba90a2d9e076

Essilor Instruments USA - Pre-Installation Site Readiness

1. Open the survey from the email, or from **Needs my action**. The Status column says **Waiting on IT review**.

← EI Portal

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INSTRUMENTS USA

Pre-Installation Surveys

Sharif Elsharkawy · IT Reviewer

Sign out

Surveys

Search company, SO #, WO #, Zc

Needs my action 1

All open 1

Sales Rep 0

Coordinator Prep 0

Waiting on Customer 0

Ready for Approval 1

Approved 0

Cancelled 0

COMPANY	STATUS	SO # / WO #	ZOHO #	INSTALL DATE	SALES REP	COORDINATOR	LAST CHANGE
Bright Eyes Optometry dree@example.com	READY FOR APPROVAL Waiting on IT review	SO SO-4471 WO WO-88	ZH-1025	Nov 2, 2026	Sam Rivera	Angela Arcand	Oct 14, 2026, 8:56 AM

2. Read section 4, Network and IT Requirements. The status panel explains what to do.

SALES REP	COORDINATOR	CUSTOMER	APPROVAL
READY FOR APPROVAL		History Download draft PDF	
The customer submitted the checklist. Review the Network and IT Requirements, then sign in "IT / Network Review" and click "Sign off IT review" — or return it to the customer with a note. IT review: waiting for the IT Reviewer (Sharif Elsharkawy) to sign off the Network and IT Requirements. Approval is blocked until then. Sales Rep: Sam Rivera · Service Coordinator: Angela Arcand (Angela.Vaughan@essilorinstrumentsusa.com)			

3. **If something is missing or wrong**, click **Return to Customer** and say what is needed. The customer gets a new link with the note. The IT address and the coordinator are copied, and the customer's replies go to IT.

Return to the customer?

The customer gets a new link by email with your note, so they can make the changes and submit again. The IT address is copied, and any IT sign-off is cleared.

WHAT DOES THE CUSTOMER NEED TO CHANGE? (REQUIRED)

Please add the static IP address for the phoropter and the name of your IT company.

Go back

Return to customer

Changes needed: pre-installation checklist for Bright Eyes Optometry

From: Essilor Instruments USA <notification@essilorinstrumentsusa.kpidomain.com>
 To: Dr. Jamie Lee <drlee@example.com>
 Cc: Elsharkawy Sharif <Sharif.Elsharkawy@essilorinstrumentsusa.com>, Angela Arcand <Angela.Vaughan@essilorinstrumentsusa.com>
 Reply-To: Sharif Elsharkawy <Sharif.Elsharkawy@essilorinstrumentsusa.com>

Essilor Instruments USA

Pre-installation checklist

Hello Dr. Jamie Lee,

Our IT / network team reviewed the Network and IT Requirements in your pre-installation checklist and needs a few changes before your installation can be confirmed.

Note:
Please add the static IP address for the phoropter and the name of your IT company.

Open the checklist

If the button does not work, copy this address into your browser:
https://essilorinstrumentsusa.kpidomain.com/Service%20Hub/pre-install-survey/pre_install_survey.html?t=DOS2Rk8t7N2cHg_t1kqaKpKfMhtk0_E0x0m1rvy0

You can save your progress and come back with the same link. This link is personal to you and works until November 13, 2026.

Questions? Contact your Service Coordinator, Angela Arcand, at Angela.Vaughan@essilorinstrumentsusa.com. You can also simply reply to this email.

Essilor Instruments USA - Pre-Installation Site Readiness

4. **If everything is right**, sign in the **IT / Network Review** card, type your printed name, add notes if useful, and click **Sign off IT review**.

IT / NETWORK REVIEW

YOUR SECTION

Check the Network and IT Requirements above, then sign and click "Sign off IT review".

IT REVIEWER SIGNATURE *



Clear signature

IT REVIEWER PRINTED NAME *

Sharif Elsharkawy

IT REVIEW NOTES

Static IP and LAN drop in Lane 1 confirmed with TechCare.

Check the Network and IT Requirements

Sign off the Network and IT Requirements?

Your signature and notes are saved and the Service Coordinator is emailed that they can approve. After signing off you can no longer change the IT review unless the survey is sent back to the customer.

Go back

Sign off

Email sent: the coordinator receives "IT review completed" with the IT notes.

IT review completed: Bright Eyes Optometry

From Essilor Instruments USA <notification@essilorinstrumentsusa.kpidomain.com>
 To Angela Arcand <Angela.Vaughan@essilorinstrumentsusa.com>
 Reply-To Sharif Elsharkawy <Sharif.Elsharkawy@essilorinstrumentsusa.com>

Essilor Instruments USA

IT review completed

Sharif Elsharkawy signed off the Network and IT Requirements for **Bright Eyes Optometry**. You can now approve the survey.

Note:
Static IP and LAN drop in Lane 1 confirmed with TechCare.

Open the survey

If the button does not work, copy this address into your browser:
https://essilorinstrumentsusa.kpidomain.com/Service%20Hub/pre-install-survey/pre_install_survey.html?id=87dde8d1fc68aaf5698eba90a2d9e076

Essilor Instruments USA - Pre-Installation Site Readiness

After sign-off the IT card locks. If the survey is later returned to the customer or rescheduled, the IT signature is cleared automatically and IT reviews the corrected answers. Admins can also sign the IT review when the IT Reviewer is away.

Step 4 — Coordinator reviews and approves

The coordinator either approves, which locks the survey and emails the signed PDF, or sends it back to the customer.

1. Open the survey from the email or from **Needs my action**. Read every section.
2. If the customer must change something, click **Return to Customer** and say what to change. They get a new link with your note, and their earlier answers and signature are kept.

Return to the customer?

The customer gets a new link by email with your note, so they can make the changes and submit again.

WHAT DOES THE CUSTOMER NEED TO CHANGE? (REQUIRED)

Please add the room length for Lane 1.

Go back
Return to customer

Email sent to the customer:

Changes needed: pre-installation checklist for Bright Eyes Optometry

From Essilor Instruments USA <notification@essilorinstrumentsusa.kpidomain.com>
To Dr. Jamie Lee <drlee@example.com>
Reply-To Angela Arcand <Angela.Vaughan@essilorinstrumentsusa.com>

Essilor Instruments USA

Pre-installation checklist

Hello Dr. Jamie Lee,

Your Service Coordinator reviewed your pre-installation checklist and needs a few changes before your installation can be confirmed.

Note:
Please add the room length for Lane 1.

Open the checklist

If the button does not work, copy this address into your browser:
https://essilorinstrumentsusa.kpidomain.com/Service%20Hub/pre-install-survey/pre_install_survey.html?t=vSWRTyUvEMmiNE-tvKjV9J51TV1ja0hZlo9evQRAIYA

You can save your progress and come back with the same link. This link is personal to you and works until November 13, 2026.

Questions? Contact your Service Coordinator, Angela Arcand, at Angela.Vaughan@essilorinstrumentsusa.com. You can also simply reply to this email.

Essilor Instruments USA - Pre-Installation Site Readiness

3. When it is complete, sign in **Service Coordinator Review & Approval** and type your printed name.

SERVICE COORDINATOR REVIEW & APPROVAL
YOUR SECTION

SERVICE COORDINATOR SIGNATURE *



Clear signature

SERVICE COORDINATOR PRINTED NAME *

Angela Arcand

4. Click **Approve & send PDF** and confirm.

Save

Unsaved changes

Cancel survey

Reschedule

Return to Customer

Approve & send PDF

With digital equipment, the coordinator can review and sign at any time, but **Approve** stays greyed out until the IT Reviewer signs off (Step 3b). The status panel shows who it is waiting for.

SALES REP

COORDINATOR

CUSTOMER

APPROVAL

READY FOR APPROVAL

History

Download draft PDF

The customer submitted the checklist. Review every section, then sign and approve — or return it to the customer with a note.

IT review: waiting for the IT Reviewer (Sharif Elsharkawy) to sign off the Network and IT Requirements. Approval is blocked until then.

Sales Rep: Sam Rivera · Service Coordinator: Angela Arcand (Angela.Vaughan@essilorinstrumentsusa.com)

Save

Saved 8:56 AM

Cancel survey

Reschedule

Return to Customer

Approve (waiting for IT sign-off)

Once IT has signed, both signatures sit side by side and **Approve & send PDF** is available. The final PDF includes both.

SERVICE COORDINATOR REVIEW & APPROVAL
YOUR SECTION

SERVICE COORDINATOR SIGNATURE *



Clear signature

SERVICE COORDINATOR PRINTED NAME *

Angela Arcand

IT / NETWORK REVIEW
IT REVIEWER

IT REVIEWER SIGNATURE *



IT REVIEWER PRINTED NAME *

Sharif Elsharkawy

IT REVIEW NOTES

Static IP and LAN drop in Lane 1 confirmed with TechCare.

Save

All changes saved

Cancel survey

Reschedule

Return to Customer

Approve & send PDF



At this step, **Reschedule** sends the survey back to Coordinator Prep if the installation must move, and **Cancel survey** closes it.

Email sent: the approval email goes to the customer and coordinator, with the Sales Rep and Jean Aragundi on copy. The IT address (Sharif Elsharkawy) is also copied when the order includes a digital phoropter, digital lensometer or autorefractor. The final PDF is attached.

Approved: pre-installation checklist for Bright Eyes Optometry
From Essilor Instruments USA <notification@essilorinstrumentsusa.kpidomain.com>
To Dr. Jamie Lee <drlee@example.com>, Angela Arcand <Angela.Vaughan@essilorinstrumentsusa.com>
Cc Jean Aragundi <jaragundi@essilorinstrumentsusa.com>, Sam Rivera <rep@essilorinstrumentsusa.com>, Elsharkawy Sharif <Sharif.Elsharkawy@essilorinstrumentsusa.com>
Reply-To Angela Arcand <Angela.Vaughan@essilorinstrumentsusa.com>
[Pre_Install_Survey_Bright_Eyes_Optometry.pdf \(941 KB\)](#)

Essilor Instruments USA

Pre-installation checklist approved

The pre-installation site readiness checklist for **Bright Eyes Optometry** has been approved by Angela Arcand.

Installation date: 2026-11-02 (Afternoon (PM))

The completed checklist is attached as a PDF for your records.

Essilor Instruments USA - Pre-Installation Site Readiness

The attached PDF is the whole checklist, stamped as approved with both signatures:

PRE-INSTALLATION SITE READINESS CHECKLIST

To help ensure your installation is completed safely and efficiently, please review and complete the following checklist before your scheduled installation date.

CUSTOMER & SITE INFORMATION

COMPANY / PRACTICE NAME *

Bright Eyes Optometry

DELIVERY ADDRESS *

100 Main St, Fort Worth, TX 76102

CONTACT NAME *

Dr. Jamie Lee

CONTACT PHONE

817-555-0100

CONTACT EMAIL (the customer's checklist link is sent here) *

drlee@example.com

EQUIPMENT TO BE INSTALLED

Select all ophthalmic instruments and accessories scheduled for delivery and setup:

☒ Examination Chair☐ Instrument Stand☒ Slit Lamp☐ Applanation Tonometer☐ Non-Contact Tonometer (NCT)☐ Automated Perimeter / Visual Field☐ Manual Phoropter☒ Digital Phoropter☐ AutoRefractor / Keratometer☐ Keratometer (Manual)☐ Manual Lensometer☐ Digital Lensometer☐ Hand Held Scopes☐ Acuity Chart / Projector

After approval the survey is locked. Anyone on staff can open it and click **Download approved PDF**.

History and audit trail

Every survey keeps a permanent record of who did what and when; staff open it with the **History** button at the top of the survey.

[← All surveys](#)

SALES REP

COORDINATOR

CUSTOMER

APPROVED

Approved by Angela Arcand on Oct 14, 2026, 8:16 AM. The survey is locked and the first Sales Rep: Sam Rivera · Service Coordinator: Angela Arcand (Angela.Vaughan@essilorinstrumentsusa.com)

ESSILOR

INSTRUMENTS USA

PRE-INSTALLATION SITE READINESS CHECKLIST

To help ensure your installation is completed safely and efficiently, please review this checklist before your scheduled installation date.

CUSTOMER & SITE INFORMATION

COMPANY / PRACTICE NAME *

Bright Eyes Optometry

DELIVERY ADDRESS *

100 Main St, Fort Worth, TX 76102

CONTACT NAME *

Dr. Jamie Lee

CONTACT PHONE

817-555-0100

CONTACT EMAIL (the customer's checklist link is sent here) *

drlee@example.com

EQUIPMENT TO BE INSTALLED

Select all ophthalmic instruments and accessories scheduled for delivery and setup:

Change History

Close

✓ Audit trail verified: no entry has been altered or removed.

Email sent

Oct 14, 2026, 8:16 AM · System

Approved survey PDF → drlee@example.com, Angela.Vaughan@essilorinstrumentsusa.com, jaragundi@essilorinstrumentsusa.com (cc), rep@essilorinstrumentsusa.com (cc), Sharif.Elsharkawy@essilorinstrumentsusa.com (cc)

Approved → APPROVED

Oct 14, 2026, 8:16 AM · Angela Arcand · Service Coordinator · IP 127.0.0.1 · v14

Final PDF stored (SHA-256 02b94826667d5691b86fc4aa509e8a07a971957402db2455a512e13f923c09f3); approved data SHA-256 7294c04e3d3a84354b744ae7d68f4368d6dff346e0aa2ac9f9f5f34cc d0ba5a38

Saved changes

Oct 14, 2026, 8:16 AM · Angela Arcand · Service Coordinator · IP 127.0.0.1 · v13

Service Coordinator ~~(blank)~~

Signature ~~(blank)~~ Signature (fingerprint 69a2de88372f)

Service Coordinator ~~(blank)~~

Printed Name ~~(blank)~~ Angela Arcand

Email sent

Oct 14, 2026, 8:16 AM · System

Submitted notice to coordinator → Angela.Vaughan@essilorinstrumentsusa.com

Submitted by customer → READY FOR APPROVAL

Oct 14, 2026, 8:16 AM · Customer (drlee@example.com) · IP 127.0.0.1 · v12

Saved changes

Oct 14, 2026, 8:16 AM · Customer (drlee@example.com) · IP 127.0.0.1 · v11

Lane 1: Room length ~~(blank)~~ 14 ft

Email sent

Oct 14, 2026, 8:16 AM · System

- **Each entry** shows the action, the date and time, the person (or “Customer” with their email), their role and IP address.
- **Saved changes** list every field that changed, old value crossed out and new value below.
- **Emails** are logged too, with every recipient. A failed email shows in red.
- **Notes** typed in send, return and cancel dialogs appear with the step.

The green line “**Audit trail verified**” means no entry has been edited or deleted. The entries are chained together, so a change made directly in the database would break the chain and show a red warning instead.

Every email at a glance

All emails come from **notification@essilorinstrumentsusa.kpidomain.com**; replies go to the person named in the Reply-To column.

When	Subject	To	Copy	Reply-To
Sales Rep sends to coordinator	New pre-installation survey: <i>company</i>	Chosen coordinator	Alicia Anselmo	Sales Rep
Coordinator returns to Sales Rep	Survey returned: <i>company</i>	Sales Rep	—	Coordinator
Coordinator sends to customer, or emails a new link	Action needed: pre-installation checklist for <i>company</i>	Customer contact	—	Coordinator
Customer submits	Ready for approval: <i>company</i>	Coordinator	—	—
Customer submits (digital equipment)	IT review needed: <i>company</i>	IT Reviewer(s)	IT address, if not already the reviewer	Coordinator
Coordinator returns to customer	Changes needed: pre-installation checklist for <i>company</i>	Customer contact	IT address (digital equipment)	Coordinator
IT Reviewer returns to customer	Changes needed: pre-installation checklist for <i>company</i>	Customer contact	IT address + coordinator	IT Reviewer
IT Reviewer signs off	IT review completed: <i>company</i>	Coordinator	—	IT Reviewer
Coordinator approves	Approved: pre-installation checklist for <i>company</i> (PDF attached)	Customer + coordinator	Sales Rep, Jean Aragundi; IT address for digital equipment	Coordinator



Questions

The Approve button is greyed out.

The order has digital equipment and the IT Reviewer has not signed off yet. The status panel names who it is waiting for.

The card in the EI Portal is locked.

Your Pre-Install level is None. Ask an admin to set it in the admin page.

The app sends me to the sign-in page.

Your portal session ended (after one day, or because you signed in on another device). Sign in again.

A coordinator is missing from the list.

Their Pre-Install level must be Service Coordinator or Admin.

The customer says the link does not work.

It expired after 30 days, was replaced by a newer one, or the survey was already submitted. Use **Email a new link**.

An email did not arrive

Open **History**: a red "Email could not be sent" entry shows the reason. Check the spam folder too.

I need to change an approved survey.

Approved surveys are locked so the PDF stays the record. Start a new survey if the installation changes.