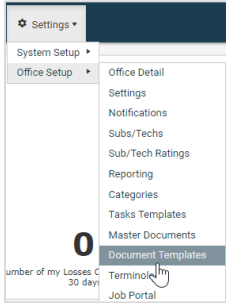


Document Templates – How to Add

To add Document Templates in Restoration Manager, go to Settings → Office Setup → Document Templates

Note: Employee records can only be setup by the Administrator of the application.

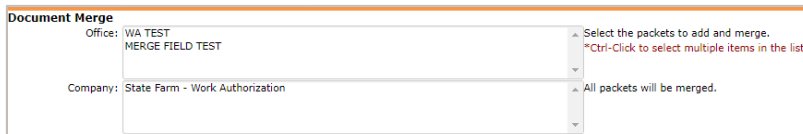


How to add Template Packet

1. Click the **New Template Packet**, located at the bottom left of page.



2. Apply the **Packet Title**; such as Repair Documents, Work Completed Documents, etc.
3. Apply the **Packet Description** (if applicable).
4. Check **Create all merged documents as pdf**; if a signature will be applied to the document(s) when using ManageIT Mobile.
5. **Assign To...** options
 - a. **All Jobs**; by selecting this option the Template Packet and all the Documents within the packet will be assigned to all existing and new jobs added into Restoration Manager. If this option is not checked then the Template Packets will be available to merge at the bottom of the Add New Lead Page.
**See example below what the Packets look like when they are available from the Lead Page.*
 - b. **Job based on Company**; search for the Company when the Company is selected from the Lead Entry page the documents will be will appear under Company to be merged.
**See example below.*



How to Add Template to Packet

1. **Template** upload select the arrow to browse your computer and select the document you would like to add to the Packet.
2. Check **Merged Document will be Viewable by Job Contact** if you would like the documents to viewable in the Job Portal.
3. Check **Create all merged documents as pdf**; if a signature will be applied to the document(s) when using ManageIT Mobile.
4. Select **Add Packet**.

Template Packet:

Packet Title:

Packet Description:

Packet Status: Active ▾

Create all merged documents as pdf

Assign To...

All Jobs

Job based on Company:

Company:

Add Template to Packet:

Template:

Merged Document will be Viewable by Job Contact

Create merged document as pdf

Document Templates – How to Add

After the packet is added single click the Packet Title to expand, click the **Upload File** to browse your computer and select the document you would like to add to the Packet.

Title	Description	All Jobs	Merge All As Pdf	Status
> AOB Documents		Yes	Yes	Active
> WA TEST		No	Yes	Active
> State Farm - Work Authorization		No	Yes	Active

Template Packet:
 Packet Title:
 Packet Description:
 Packet Status:
 Create all merged documents as pdf
 Assign To...
 All Jobs
 Job based on Company:
 Company:

Add Template to Packet:
 Template:
 Merged Document will be Viewable by Job Contact
 Create merged document as pdf

Continue with this step until all the documents have been added to this Template Packet.

Note: There is no limit to the number of word documents that can be added to the Template Packet.

Important: When editing a Document, you must retitle the Document before reuploading it.

Repeat the steps until all your packets and documents have been added into Restoration Manager.

To remove an existing document within a packet single click on the **triangle** to expand and display all the documents stored in the packet or you can click **Expand All**. Single click on the Document you would like to remove, click **Delete**.

Title	Description	All Jobs	Merge All As Pdf	Status
▼ AOB Documents		Yes	Yes	Active
Title	Description	Viewable	Merge As Pdf	Status
AOB.docx		No	Yes	Active
AOB TPA.docx		No	Yes	Active
▼ WA TEST		No	Yes	Active
Title	Description	Viewable	Merge As Pdf	Status
Services Work Authorization TEST.docx		No	Yes	Active
▼ State Farm - Work Authorization		No	Yes	Active
Title	Description	Viewable	Merge As Pdf	Status
Services Work Authorization TEST1.docx		No	Yes	Active

Template:
 Packet:
 Template Title:
 Template Description:
 Template Status:
 Change Template:
 Merged Document will be Viewable by Job Contact
 Create merged document as pdf