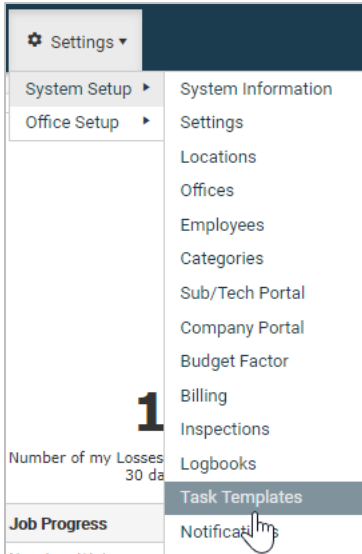


## Task Template - Setup

Tasks is a convenient feature that can be setup to auto populate to individual Jobs based on the Job date fields and can be pre-assigned to any of the employee fields.

To setup a Task Template in Restoration Manager go to Settings→ System Setup→ Task Templates



To proceed click Add



Template Name	# Tasks	Auto-Create Condition	Status
48 Hour - Estimate Delivered Tasks (Auto Email)	4	Estimate Uploaded	Active
Accounting Tasks	2	WA/Contract Signed	Active
Correspondence Reminder	3	None	Active
Estimate Follow-up - Approval	1	Site Inspected	Active
Estimate Update	1	Estimate Uploaded	Active
Follow Up - Homeowner	2	None	Active
Job Closing - Production Tasks	4	Job Completed	Active
Job Completed Email TEST	1	Job Completed	Active
Marketing Touches	5	None	Active
New Customer Tasks	2	Date Received	Active
Post Construction Tasks	5	Work Start Date End	Active
Previous Dependent Task TEST 1	4	None	Active
Previous Dependent Task TEST 2	4	None	Active



## Task Template - Setup

After clicking on Add; Name, Status (Active or Inactive), Type (Job or Company), Auto-Create Condition, Company, Job Type, Loss Type, Sites, Order, Task Type, Task, Description/Email Template, # of Days, Prev Depend, Assignee and Send Completed Task Email will be displayed.

Name:  Status: Active ▼ Type: Job ▼  
Job, Company, Office & Business related merge fields are available.

Auto-Create Condition: None ▼

Company:  \*Ctrl-Click to select multiple items in the list

Job Type:

Loss Type:

Available in all

Sites:

Order	Task Type	Task	Description/Email Template	# of Days	Prev Depend	Assignee	Send Completed Task Email
1	Standard ▼	<input type="text"/>	<input type="text"/>	0	<input type="checkbox"/>	Project Mgr ▼	<input type="checkbox"/>
2	Standard ▼	<input type="text"/>	<input type="text"/>	0	<input type="checkbox"/>	Project Mgr ▼	<input type="checkbox"/>
3	Standard ▼	<input type="text"/>	<input type="text"/>	0	<input type="checkbox"/>	Project Mgr ▼	<input type="checkbox"/>
4	Standard ▼	<input type="text"/>	<input type="text"/>	0	<input type="checkbox"/>	Project Mgr ▼	<input type="checkbox"/>
5	Standard ▼	<input type="text"/>	<input type="text"/>	0	<input type="checkbox"/>	Project Mgr ▼	<input type="checkbox"/>
6	Standard ▼	<input type="text"/>	<input type="text"/>	0	<input type="checkbox"/>	Project Mgr ▼	<input type="checkbox"/>
7	Standard ▼	<input type="text"/>	<input type="text"/>	0	<input type="checkbox"/>	Project Mgr ▼	<input type="checkbox"/>
8	Standard ▼	<input type="text"/>	<input type="text"/>	0	<input type="checkbox"/>	Project Mgr ▼	<input type="checkbox"/>
9	Standard ▼	<input type="text"/>	<input type="text"/>	0	<input type="checkbox"/>	Project Mgr ▼	<input type="checkbox"/>
10	Standard ▼	<input type="text"/>	<input type="text"/>	0	<input type="checkbox"/>	Project Mgr ▼	<input type="checkbox"/>



Apply the **Name** of the new template that will be setup.

Name:

Select the **Type** (Job or Company) from the drop down. If Job has been selected, then the tasks setup within the template will need to be Job related. If Company has been selected, then the tasks within the template will need to be Company related.

Type: Job ▼

Job

Company



## Task Template - Setup

Select which **Auto-Create Condition** will be used from the drop-down, the condition determines when the template will generate the required tasks/actions to be performed.

*Note: There are no Auto-Create Conditions available when Company is selected for the Type and the template must be manually applied to the Company. When "None" is selected then the template will need to be manually applied to the Job. When "Job Creation" is selected that means all Tasks for this Template will be applied to every new job created.*

To define which **Companies, Job Types** or **Loss Types** are applicable to the Task Template choose from the related field. If any of these fields are left blank, then the Task Template will be applicable to all. The **Sites** selection cannot be left blank this is required for template to be applied manually or automatically.

1. Select the **Task Type** from the drop down.

### Task Types

- Standard – needs to be completed by the Assignee
- Auto Email – automatically sends an Email
  - The email can be sent to the Primary Contact, Secondary Contact, Referral Source, Agent/Broker, Adjuster or Customer (customer is user definable by the admin) applied to the Job.
  - The email can be sent Anytime or Between a particular time.
  - You can attach one file to the email

2. Enter the **Task**
3. Within the **Description/Email Template** field if Task Type Standard was selected the apply the Description of the Task. If Task Type Auto Email was selected, then select the Email Template from the drop down.
4. Enter the **# of Days** the task is to be performed and completed by.
5. If applicable check **Prev Depend** \*\*See below for Prev Depend explanation
6. Select the **Assignee** from the drop-down this is the employee responsible to complete the Task or who the auto email will come from.
7. **Send Completed Task Email**; check the box if you would like the completed task email sent.
8. When you are finished setting up the Task Template click the **save icon** located to the bottom left of the page.

*Note: Only ten (10) tasks can be assigned to one template*



## Task Template - Setup

**IMPORTANT:** The order number displayed below **is not** the order number the Tasks will assign to the Job or Company when applied. When the Tasks are added to the job they will display in Due in Days first then Alpha Order.

Name:  Status:  Type:

Auto-Create Condition:

Company:

Job Type:

Loss Type:

Available in all

Sites:

Job, Company, Office & Business related merge fields are available.

Order	Task Type	Task	Description/Email Template	# of Days	Prev Depend	Assignee	Send Completed Task Email
1	Standard	Call the Customer	Make contact with the	0	<input type="checkbox"/>	Estimator	<input type="checkbox"/>
2	Auto Email	Welcome Email	Restoration Manager & Welc	0	<input type="checkbox"/>	Marketing Rep	<input type="checkbox"/>
Send Email To: <input checked="" type="checkbox"/> Primary Contact <input checked="" type="checkbox"/> Secondary Contact <input type="checkbox"/> Referral Source <input type="checkbox"/> Agent/Broker <input type="checkbox"/> Adjuster <input type="checkbox"/> Customer Send Email At: <input type="radio"/> Anytime <input checked="" type="radio"/> Between 6:00 AM and 6:00 PM <small>Note: If Task is triggered after the Between time, email will send the following day.</small> Current File: --none-- Attach File: <input type="button" value="No file chosen"/> <input type="checkbox"/> Merge Attached File							
3	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
4	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
5	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
6	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
7	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
8	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
9	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
10	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>



### Prev Depend Explanation:

The way previous dependency works is it looks at the prior task in the order and continually moves the date out of the task until the previous task is marked completed. The 2<sup>nd</sup> task should always have a due in days as at least 1 day out. If it is set to 0, both tasks will appear due today.

**Prev Depend Example:** Task 1 is set up with a Due in Days of 0 and Task 2 is marked as Prev Dependency and has a Due in Days as 3. When the task template applies to the job, both tasks show up, Task 1 is Due 7/28/19 and Task 2 is Due 7/31/19. Task 1 does not get completed today. Tomorrow, Task 1 shows as Overdue and Task 2 will have a Due Date of 8/1/19. Task 1 is finally completed Monday, Task 2 will now have a due date firm of 8/2/19.

**Tips:** Drag the /// located in the bottom right hand corner of the Description/Email Template field to expand. Another option to display the Description/Email Template field click the magnifying glass the field will now be displayed in a pop-up dialogue box. The description can be applied within the pop-up remember to select save before closing the pop-up.



## Task Template - Setup

### Example Task Template:

Name:  Status:  Type:

Job, Company, Office & Business related merge fields are available.

Auto-Create Condition:

Company:

Job Type:

Loss Type:

Available in all

Sites:

\*Ctrl-Click to select multiple items in the list

Order	Task Type	Task	Description/Email Template	# of Days	Prev Depend	Assignee	Send Completed Task Email
1	Standard	Clean Up	Post construction clean up -	0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
2	Standard	Verify all Signatures	Verify all COS, Finals, Etc	0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
3	Standard	Verify all Estimates, Supps, CO	Verify all costs to be invoiced	3	<input checked="" type="checkbox"/>	Project Mgr	<input type="checkbox"/>
4	Standard	Approval of Invoices	Approval of Invoices	4	<input checked="" type="checkbox"/>	Project Mgr	<input type="checkbox"/>
5	Standard	Chase Payments	Chase Payments	7	<input checked="" type="checkbox"/>	Accountant	<input type="checkbox"/>
6	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
7	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
8	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
9	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
10	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>



### Example Task Template, including Auto Email:

Name:  Status:  Type:

Job, Company, Office & Business related merge fields are available.

Auto-Create Condition:

Company:

Job Type:

Loss Type:

Available in all

Sites:

Order	Task Type	Task	Description/Email Template	# of Days	Prev Depend	Assignee	Send Completed Task Email
1	Standard	Call the Customer	Make contact with the	0	<input type="checkbox"/>	Estimator	<input type="checkbox"/>
2	Auto Email	Welcome Email	Restoration Manager & Welc	0	<input type="checkbox"/>	Marketing Rep	<input type="checkbox"/>
Send Email To: <input checked="" type="checkbox"/> Primary Contact <input checked="" type="checkbox"/> Secondary Contact <input type="checkbox"/> Referral Source <input type="checkbox"/> Agent/Broker <input type="checkbox"/> Adjuster <input type="checkbox"/> Customer Send Email At: <input type="radio"/> Anytime <input checked="" type="radio"/> Between 6:00 AM and 6:00 PM Note: If Task is triggered after the Between time, email will send the following day. Current File: --none-- Attach File: <input type="text" value="No file chosen"/> <input type="checkbox"/> Merge Attached File							
3	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
4	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
5	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
6	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
7	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
8	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
9	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>
10	Standard			0	<input type="checkbox"/>	Project Mgr	<input type="checkbox"/>

