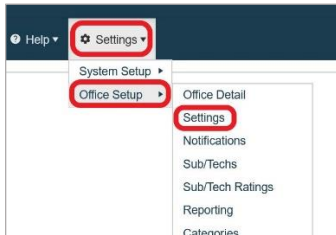


TechLoc Integration

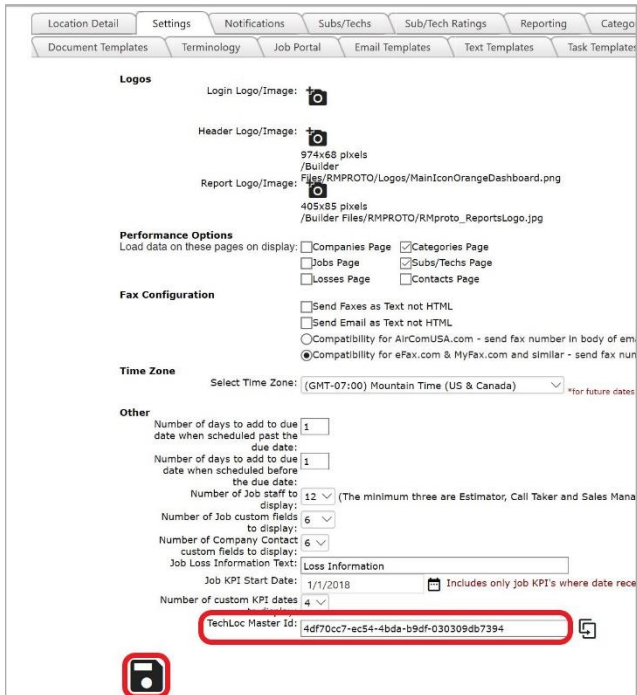
This document will provide you with step by step instructions on how to setup your Stockpoints, Equipment & Employees (optional) in Restoration Manager for use with the TechLoc integration. ****Reminder: This is not a training document on the use of the TechLoc Assest Tracker program****

Only after you have received your Master ID from TechLoc and the TechLoc integration has been turned on for your database, you will need to perform the following Administrative functions to begin the setup of the integration in Restoration Manager.

As the Administrator go to Settings→ Office Setup→ Settings




Enter your 'Master ID' into the TechLoc Master ID field and click the Save icon.





Location Detail Settings Notifications Subs/Techs Sub/Tech Ratings Reporting Catego

Document Templates Terminology Job Portal Email Templates Text Templates Task Templates

Logos

Login Logo/Image: 

Header Logo/Image: 
974x68 pixels
/Builder

Report Logo/Image: 
Files/RMPROTO/Logos/MainIconOrangeDashboard.png
405x85 pixels
/Builder Files/RMPROTO/RMproto_ReportsLogo.jpg

Performance Options

Load data on these pages on display: Companies Page Categories Page
 Jobs Page Subs/Techs Page
 Losses Page Contacts Page


Fax Configuration

Send Faxes as Text not HTML
 Send Email as Text not HTML
 Compatibility for AirComUSA.com - send fax number in body of em
 Compatibility for eFax.com & MyFax.com and similar - send fax num

Time Zone

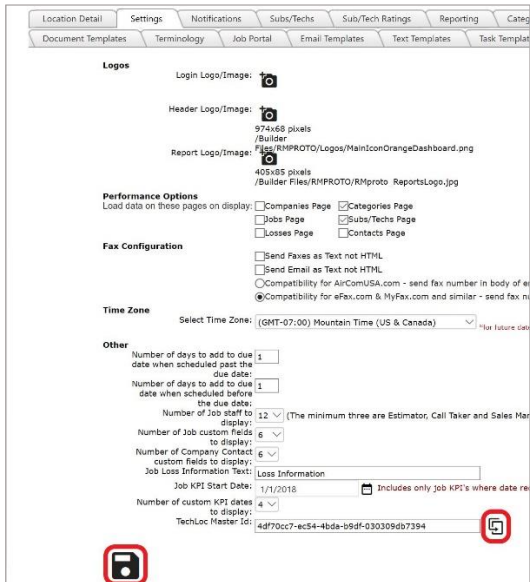
Select Time Zone: (GMT-07:00) Mountain Time (US & Canada) *for future dates

Other

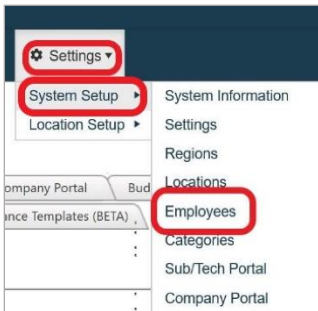
Number of days to add to due date when scheduled past the due date: 1
Number of days to add to due date when scheduled before the due date: 1
Number of Job staff to display: 12 (The minimum three are Estimator, Call Taker and Sales Mana
Number of Job custom fields to display: 6
Number of Company Contact custom fields to display: 6
Job Loss Information Text: Loss Information
Job KPI Start Date: 1/1/2018 Includes only job KPI's where date rece
Number of custom KPI dates: 4
TechLoc Master ID: 4df70cc7-ec54-4bda-b9df-030309db7394


TechLoc Integration

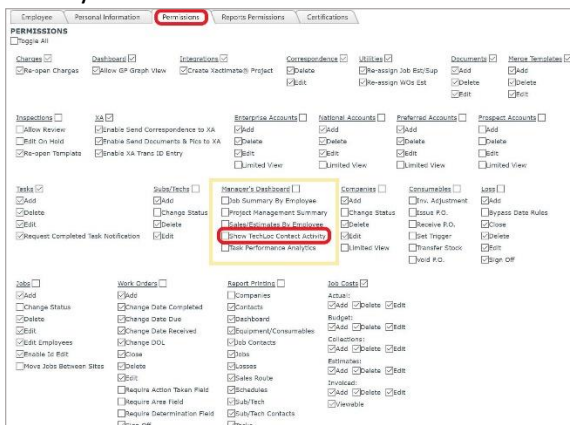
Should you have more than one office/site and opt to have the TechLoc integration with the other offices, click on the Apply to All Office icon. Then click the Save icon to complete the function.



Next go to the grey toolbar once again, select Settings→ System Setup→ Employees, then double click on the employee that will be directly interacting with TechLoc and/or equipment tracking. These employees will require an update to their permissions to allow them access to TechLoc on the Restoration Manager Dashboard.



Select the Permissions tab, locate the Manager's Dashboard permissions and check mark Show TechLoc Contact Activity.



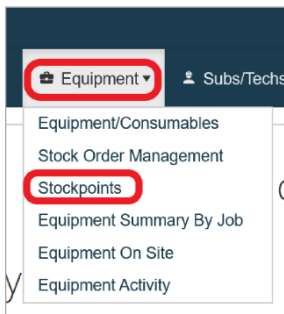
TechLoc Integration

Click the Save icon to complete the permission update.

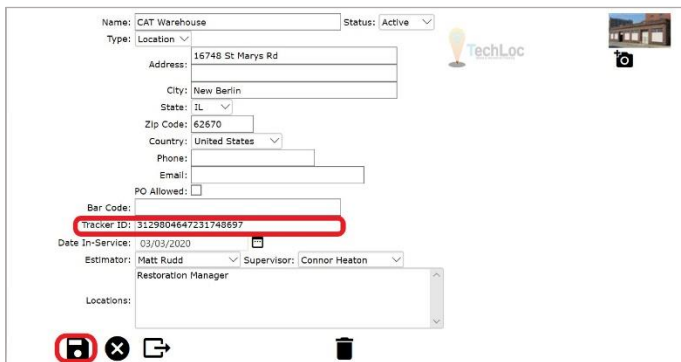


Note: The following setup steps do not require the user to be an Administrator.

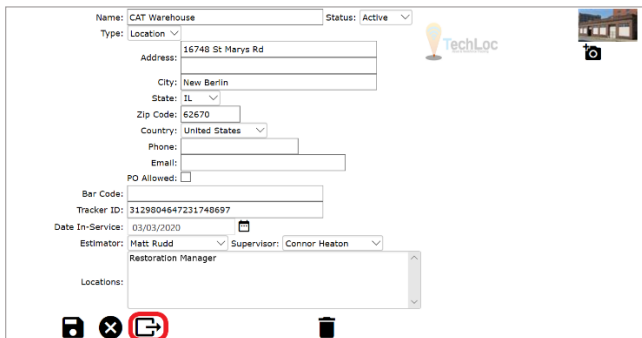
Setting up Equipment Tracking with TechLoc you will need to include the 'Tracker ID' provided to you by TechLoc into Stockpoint (Location Only) Restoration Manager database. To include this 'Tracker ID' go to Equipment on the grey toolbar and select Stockpoint.



Enter the new stockpoint information or choose an existing stockpoint. Enter the 'Tracker ID', then click the 'Save' icon.

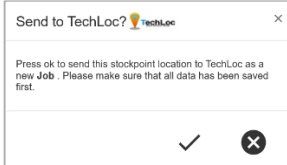


Once you have saved the 'Stockpoint' tap on the 'Send to TechLoc' icon to complete the entry of the stockpoint to Techloc.

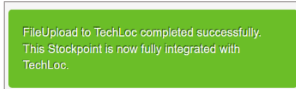


TechLoc Integration

You will receive a popup requesting a confirmation that it is ok to send the selected Stockpoint to TechLoc and to ensure that all data has been saved first. Click the Checkmark to confirm.

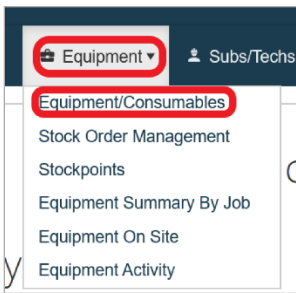


After clicking the OK icon (checkmark) you will receive a confirmation in the lower righthand side of the screen.



Once you have completed setting up your Stockpoints (Locations) you may now include the 'Tracker ID' on each piece of equipment. ****Note: The 'Track Id' will be found on the GPS device provided to you by TechLoc.**

To include this 'Tracker ID' go to Equipment on the grey toolbar and select Equipment/Consumables.



Enter the piece of equipment with the necessary equipment identification including the 'Tracker ID' number. Or choose an existing piece of equipment by performing a Search and double clicking on the selected equipment line to open the selected equipment item, enter the 'Tracker ID' then click the 'Save' icon.

Equipment Detail

Name: AS 2000 Status: Active

Default Stockpoint: Chicago, IL

Class: Air Scrubber

Manufacturer: DRI-EAZ

Model: 6402397850

Serial Number: 9842316583742118DRZ

Bar Code: AS 2000

Tracker Id:

Description: Air Scrubber


Date Purchased: 03/02/2020

Purchase Cost: 0.00

Billing Type: Flat

Flat Rate:	0.00
Hourly Rate:	0.00
Daily Rate:	0.00
Weekly Rate:	0.00

Notes: Dri-Eaz F284 DefendAir HEPA 500 Air Purifier uses HEPA room air filter media with an efficiency rating of 99.97% against 0.3-micron oily aerosol particles. Unit Weight: 44 Pounds



Next Service

Description:

Trigger on: Date:

Reading: 0.00

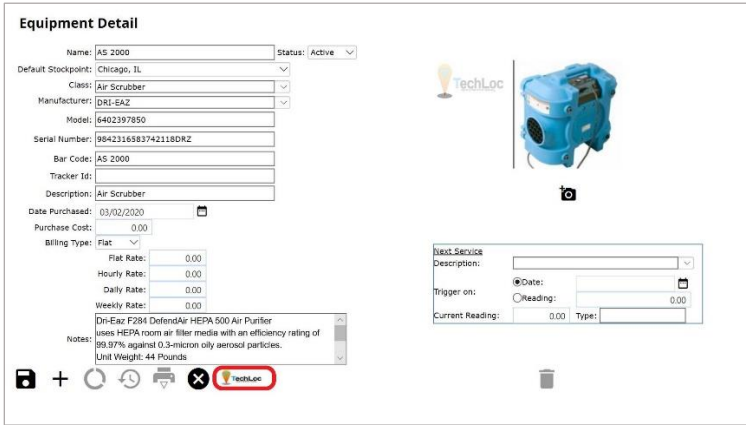
Current Reading: 0.00 Type:

S
+
↻
⌂
✖
TechLoc

🗑️

TechLoc Integration

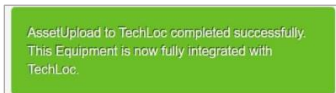
Once the equipment item is saved, click the 'Send to TechLoc' icon to complete the entry of the 'Tracker ID'.



You will receive a popup requesting a confirmation that it is OK to send the selected equipment to TechLoc and to ensure that all data has been saved first. Click the Checkmark to confirm.

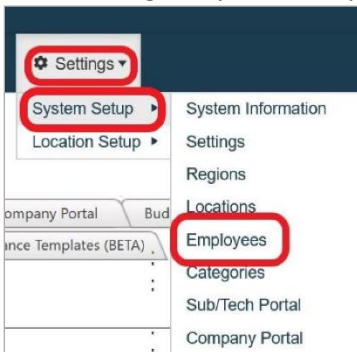


After clicking the OK icon (checkmark) you will receive a confirmation in the lower righthand corner of the screen.



Note: Additional setup for the TechLoc Asset Tracker App, the Administrator will be required to perform this setup in Restoration Manager for the integration.

Go to Settings → System Setup → Employees, double click on the employee that will be using the application.





TechLoc Integration

Enter the Tracker ID number on the Employee tab, then go to the Personal Information tab.

Employee ID [Paris] On Call
 First [Lisa] MI Last [Paris]
 Status Active
 Title/Position Project Manager Initials LP
 Address Enter a location
 City State Zip
 Country
 Phone 1 800-583-8474 Main
 Phone 2
 Phone 3
 Phone 4
 Phone 5
 Email Address [paris@verisk.com]
 SMS/Text Country Code...
 Tracker ID [109832647475498301]
 LOGIN SETUP
 Username [LisaP]
 Password
 Allow RH .Net access
 Allow RH .Mobile access
 Login Type Power User
 Dashboard View Production
 Token ad908d1dfed440b1862feaf31344bb66
 Allow web services access
 FAX SERVICE SETUP
 Account Email
 Send Fax Email To
 Fax Send Format (800) 555-1212 @ (efax.com)
 From Fax Number () -
 Updated By Travis Cunningham on 3/5/2020 11:40:11 AM
 *Ctrl-Click to select multiple items in the list

On the Personal Information provide the Employee Pay Type (Hourly) & Pay Rate then click the Save icon.

Employee Personal Information Permissions Reports Permissions Certifications
 Gender
 Hire Date
 Review Date
 Pay Type (Bi Monthly)
 Pay Rate 48.00
 Yearly Sales Goal 50.00

Loss Type	Invoice %	Collection %	Gross Profit %
Water	0.00 %	0.00 %	0.00 %
XactAnalysis Loss	0.00 %	0.00 %	0.00 %
Commissions HOA - Property Management	0.00 %	0.00 %	0.00 %
Fire/Reconstruction	0.00 %	0.00 %	0.00 %
Board UP service	0.00 %	0.00 %	0.00 %
Wind/Tornado	0.00 %	0.00 %	0.00 %
Reconstruction Service	0.00 %	0.00 %	0.00 %

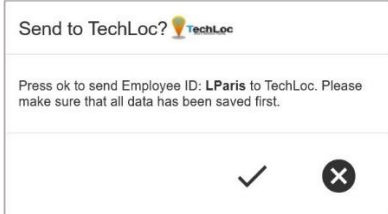
 Drug Test Date Results
 Drug Test Date Results
 Release Date
 Release Reason
 Driver License# Driver Lic. State Eligible for rehiring
 Emergency Contact Name Relationship Phone Phone

Return to the Employee tab and click the Send to TechLoc icon.

Employee Personal Information Permissions Reports Permissions Certifications
 Employee ID [Paris] On Call
 First [Lisa] MI Last [Paris]
 Status Active
 Title/Position Project Manager Initials LP
 Address Enter a location
 City State Zip
 Country
 Phone 1 800-583-8474 Main
 Phone 2
 Phone 3
 Phone 4
 Phone 5
 Email Address [paris@verisk.com]
 SMS/Text Country Code...
 Tracker ID [139820563472901]
 LOGIN SETUP
 Username [LisaP]
 Password
 Allow RH .Net access
 Allow RH .Mobile access
 Login Type Power User
 Dashboard View Production
 Token ad908d1dfed440b1862feaf31344bb66
 Allow web services access
 FAX SERVICE SETUP
 Account Email
 Send Fax Email To
 Fax Send Format (800) 555-1212 @ (efax.com)
 From Fax Number () -
 Updated By Travis Cunningham on 3/5/2020 11:03:01 AM
 *Ctrl-Click to select multiple items in the list

TechLoc Integration

You will receive a popup requesting a confirmation that it is OK to send the Employee ID to TechLoc and to make sure that all data has been saved first. Click the Checkmark to confirm.



After clicking the OK icon (checkmark) you will receive a confirmation in the lower righthand side of the screen.

