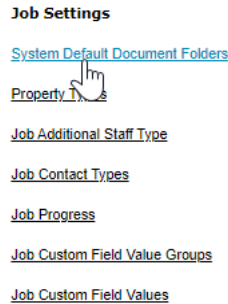
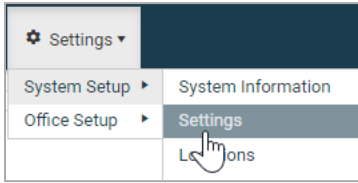


Default Document Folders – Setup

To add Default Document Folders, go to Settings→ System Setup→ Settings→ Job Settings, System Default Document Folders



If **Lock Folder Creation** is checked users cannot edit and/or delete any of the folders created regardless of their employee document permissions.

System Setting

- Lock Folder Creation
- Auto Create Folder Structure For Each New Loss Added

To add a Folder click the Add icon add the description of the Folder Name to save you need to click in the white space outside of the folder description field.

+

Folder Name	Is Locked
1. Initial Photos	No
2. Progress Photos	No
3. Final Photos	No
COS Documents	No
Estimate (CO, SUP, Revisions)	No
Other Job Documents	No
Work Authorization/Contract Docs	No

Is Locked

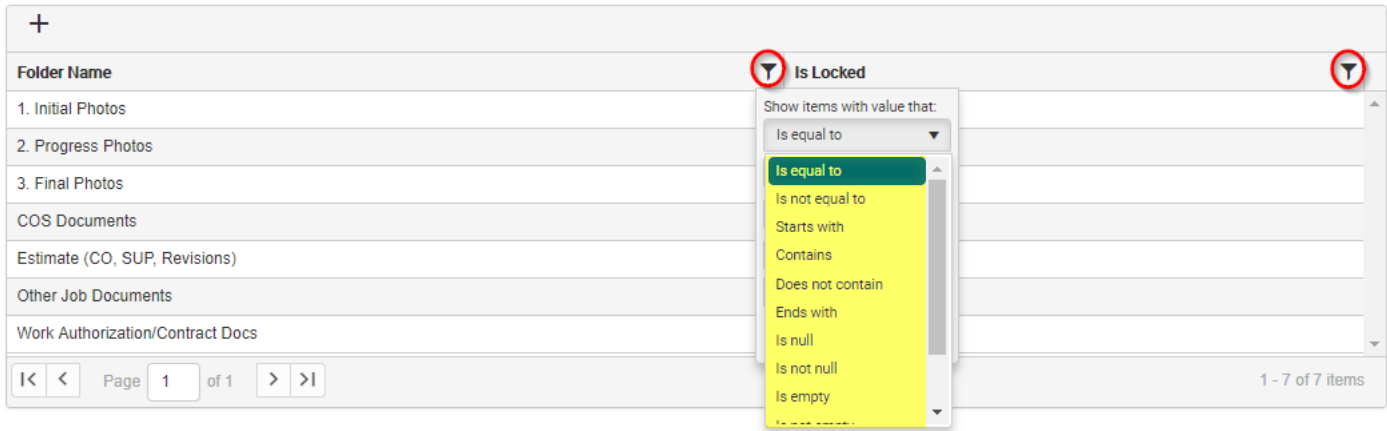
➔
💾
✕

If **Is Locked** is checked the folder cannot be moved and documents stored within the folder cannot be edited or deleted.

Important: The folders that are setup will only be added to new Jobs, Companies and Sub/Tech records.

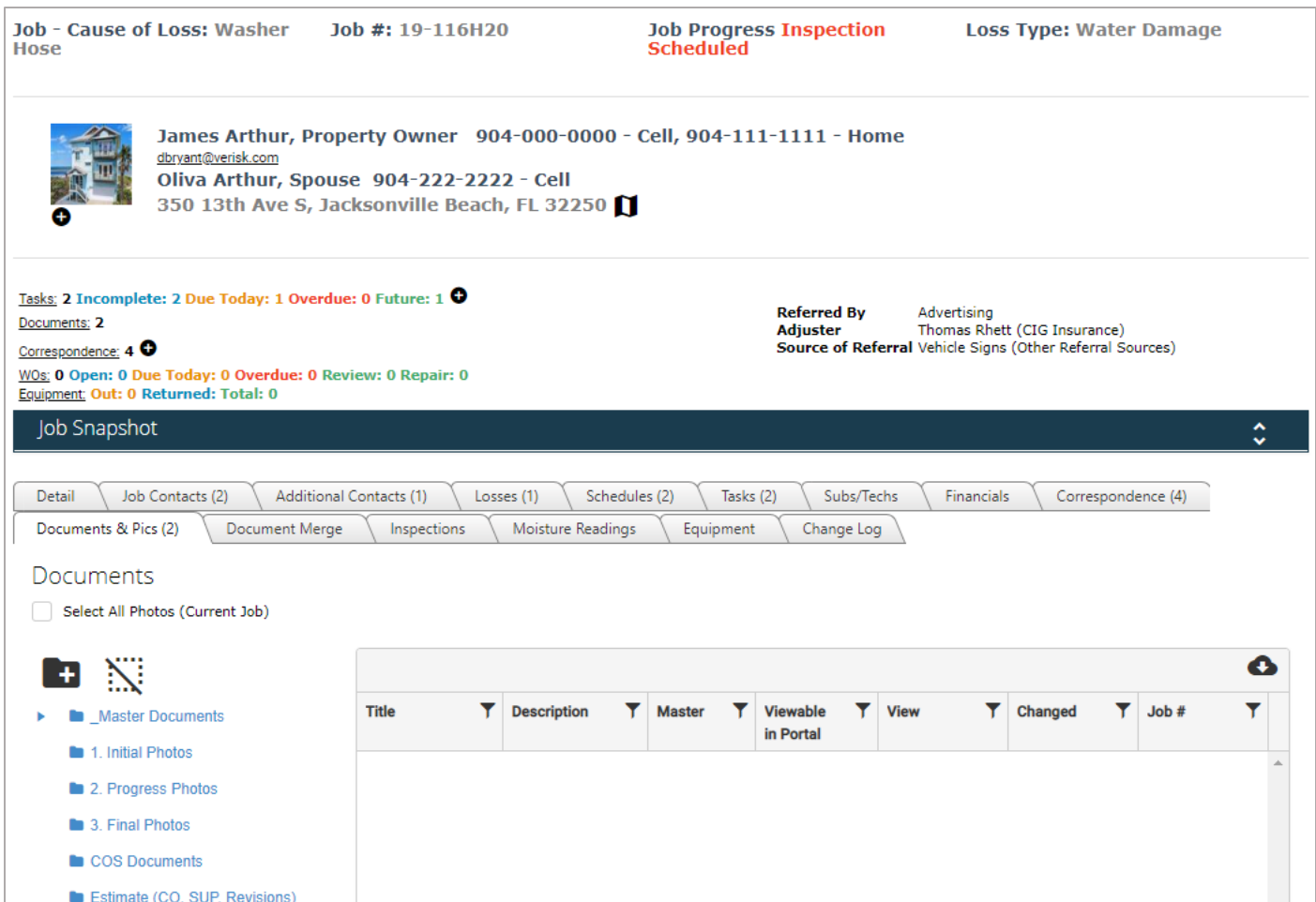
Default Document Folders – Setup

After your folders have been added you can search by clicking on one of the filters in the Header.



The screenshot shows a table of folders with a search filter dropdown open. The dropdown menu is titled "Show items with value that:" and contains the following options: "Is equal to", "Is not equal to", "Starts with", "Contains", "Does not contain", "Ends with", "Is null", "Is not null", and "Is empty". The "Is equal to" option is highlighted in yellow. The table lists folders such as "1. Initial Photos", "2. Progress Photos", "3. Final Photos", "COS Documents", "Estimate (CO, SUP, Revisions)", "Other Job Documents", and "Work Authorization/Contract Docs". The "Is Locked" column has a dropdown arrow, and the "Page 1 of 1" indicator is visible at the bottom left.

Example of the Default Document Folders added to a New Job.



The screenshot displays a job page for "Job - Cause of Loss: Washer Hose" with Job #: 19-116H20. The job progress is "Inspection Scheduled" and the loss type is "Water Damage". The property owner is James Arthur, and the spouse is Oliva Arthur. The address is 350 13th Ave S, Jacksonville Beach, FL 32250. The task summary shows 2 Incomplete, 2 Due Today, 1 Overdue, and 0 Future tasks. The document summary shows 2 Documents, 4 Correspondence, 0 WOs, 0 Open, 0 Due Today, 0 Overdue, 0 Review, and 0 Repair. The equipment summary shows 0 Out, 0 Returned, and 0 Total. The "Job Snapshot" section is expanded to show "Documents & Pics (2)". The document list includes:

- _Master Documents
- 1. Initial Photos
- 2. Progress Photos
- 3. Final Photos
- COS Documents
- Estimate (CO, SUP, Revisions)

For an overview of how to upload Documents & Pictures please refer to the following reference document **Uploading Documents & Pictures** available on the University under Training Documents → CSR/Call Taker or Estimator & Project Manager.