

## Documents & Pictures

Documents & Pics is a central area where all the documents and pictures associated with a job can be accessed by all employees. Users can add, view and search Documents/Pics depending on permissions.

To upload Documents/Pictures search the job using your preferred search method. Within the Job Detail page single click on the **Documents & Pics** tab.

*Note: The number in parentheses is the total number of Documents and Pics that are associated or linked to the job.*

<b>Job Name:</b> Braxton & Jayme Lee	<b>Job #:</b> 20-0512-F	<b>Job Progress</b> In Production	<b>Loss Type:</b> Fire
	<b>Linked Jobs:</b> <input type="text"/>		<b>Cause of Loss:</b> Puff Back



**Braxton Lee, Policy Holder** 239-000-0000 - Cell [dbryant@verisk.com](mailto:dbryant@verisk.com)

**Jayme Lee, Spouse** 239-111-1111 - Cell [jlee@email.com](mailto:jlee@email.com)

5117 Sea Bell Rd, Sanibel, FL 33957 

**Tasks:** 4 Incomplete: 3 Due Today: 0 Overdue: 1 Future: 2 +

**Documents:** 12

**Correspondence:** 5 +

**WOs:** 5 Open: 5 Due Today: 0 Overdue: 5 Review: 0 Repair: 5

**Equipment:** Out: 0 Returned: Total: 0

**Referred By** Insurance Company

**Adjuster** Dylan Michaels (Oceanside Insurance)

**Source of Referral** Oceanside Insurance (Oceanside Insurance)

Job Snapshot ^

Detail
Job Contacts (2)
Additional Contacts (2)
Losses (1)
Schedules
Tasks (4)
Subs/Techs
Financials\*\*
Correspondence (5)

Documents & Pics (12)
Document Merge
Inspections
Moisture Readings
Equipment
Change Log
Create WO's

Folders are a great way to keep your documents and pictures organized. The Administrator of Restoration Manager can create default document folders, when a new job is created the folders are available.

**Important:** For an overview on how to add default document folders please refer to the following reference document **Default Document Folders - Setup** available on the University under Training Documents → Administrator.

To Add a New Folder

1. Click the **Folder icon**; the **Add Folder pop-up** will display.
2. Type the description of the **Folder Name**.
3. Click the **Save changes**.

Documents

Add Folder All Photo




\_Master Dc

Add Folder

Folder Name




Save changes





- ▶ \_Master Documents
- 1. Initial Photos
- 2. Progress Photos
- 3. Final Photos
- COS Documents
- ▶ Estimate (CO, SUP, Revisions)
- Other Job Documents
- Work Authorization/Contract Docs
- Receipts

## Documents & Pictures

### How to upload Documents/Pictures to the Job.

**Note:** There is no limit as to how many Documents/Pictures can be stored against the job, but one individual Document cannot be larger than 10MB.

### Uploading one (1) Document or Picture

Click the **New Document** icon, located to the bottom left of page.



1. Apply a **Title** (if applicable); if a Title isn't added then the Title of the Document/Picture selected will be applied.
2. Apply a **Description** (if applicable).
3. Select a **Folder** from the drop-down (if applicable).
4. Check **Show In Job Portal** if you would like the uploaded document/picture to viewable in the Job Portal.
5. Check **Show In Company Portal** if you would like the uploaded document/picture to viewable in the Company Portal.
6. Check **Show In Intuitive Inspections** to display the Document/Picture within Intuitive Inspections.
7. Click **Select files...** browse where the document/picture is stored.
8. Select the document/picture you can drag & drop into the light grey select files... box or open the file to proceed.
9. Click the **Upload** icon to proceed.

Title

Description

Folder

Show In Job Portal     Show In Company Portal

Show In Intuitive Inspections

Select files...

 Fire Damage8.png  
2.04 MB

  Upload

### Upload in progress! Message

Documents

ation/Contract

<input type="checkbox"/>	Front of Structure		No	No		Dawn Bryant - 04/09/2020 01:22 PM	20-0512-F
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**Upload in progress! Don't leave the page until complete.**

Page 1 of 1    20 items per page    1 - 8 of 8 items

**Note:** if a document exceeds the 10MB size constraints a notification will be displayed.

When the upload is complete a Files uploaded! message displays to the bottom left of the page.



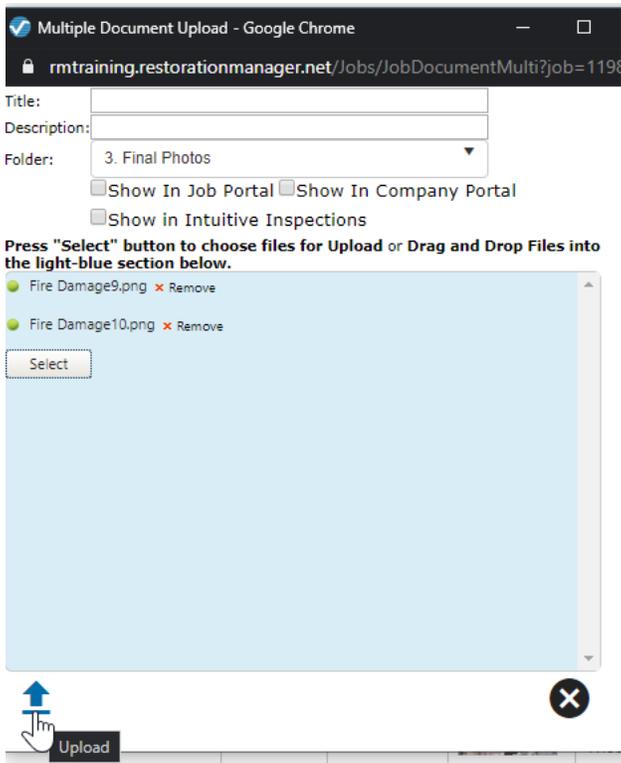
## Documents & Pictures

### Uploading more than one (1) Document or Picture

Click the **Add Multiple** icon, located to the bottom left of page.



1. Apply a **Title** (if applicable); if a Title isn't added then the Title of the Document/Picture selected will be applied.
2. Apply a **Description** (if applicable).
3. Select a **Folder** from the drop-down (if applicable).
4. Check **Show In Job Portal** if you would like the uploaded document/picture to viewable in the Job Portal.
5. Check **Show In Company Portal** if you would like the uploaded document/picture to viewable in the Company Portal.
6. Check **Show In Intuitive Inspections** to display the Document/Picture within Intuitive Inspections.
7. Click **Select** browse where the document/picture is stored.
8. Select the documents/pictures you can drag & drop into the blue box or select open to proceed.
9. Click the **Upload** icon to proceed.



When the Files have successfully uploaded the following information will display at the bottom of the dialog box.



## Documents & Pictures

### Picture upload – Front of Structure

When uploading a picture with a title of ‘Front of Structure’ only the picture will populate in the Job Header providing there isn’t another picture already uploaded.

Title

Description

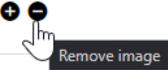
Folder

### Job Detail Header

The picture can be removed as well.



Starbucks, Property 904-000-0000 - Main  
Ryan Jones, Operations Manager 904-111-1111 - Cell [dbryant@verisk.com](mailto:dbryant@verisk.com)  
975 3rd St S, Jacksonville Beach, FL 32250



Single click on the file to display within the preview window.

#### Documents

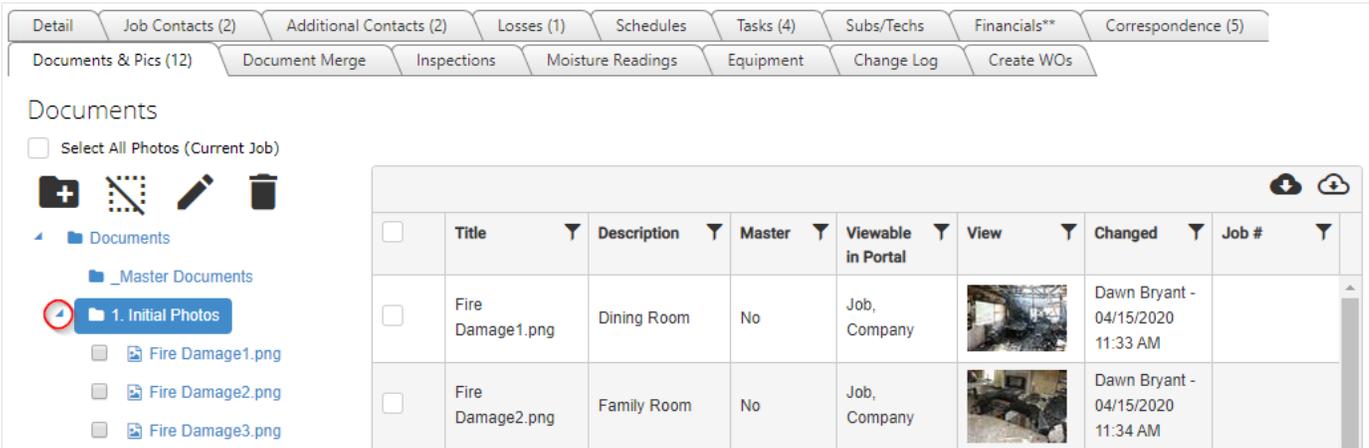
Select All Photos (Current Job)

-    
- ▶  \_Master Documents
- ▲  1. Initial Photos
  -  Damage.JPG
  -  Mold 2.JPG
  -  Mold.JPG
- ▶  2. Progress Photos
- ▶  3. Final Photos
- ▶  COS Documents
- ▶  Estimate (CO, SUP, Revisions)
- ▶  Other Job Documents
- ▶  Receipts
- ▶  Work Authorization/Contract Docs



## Documents & Pictures

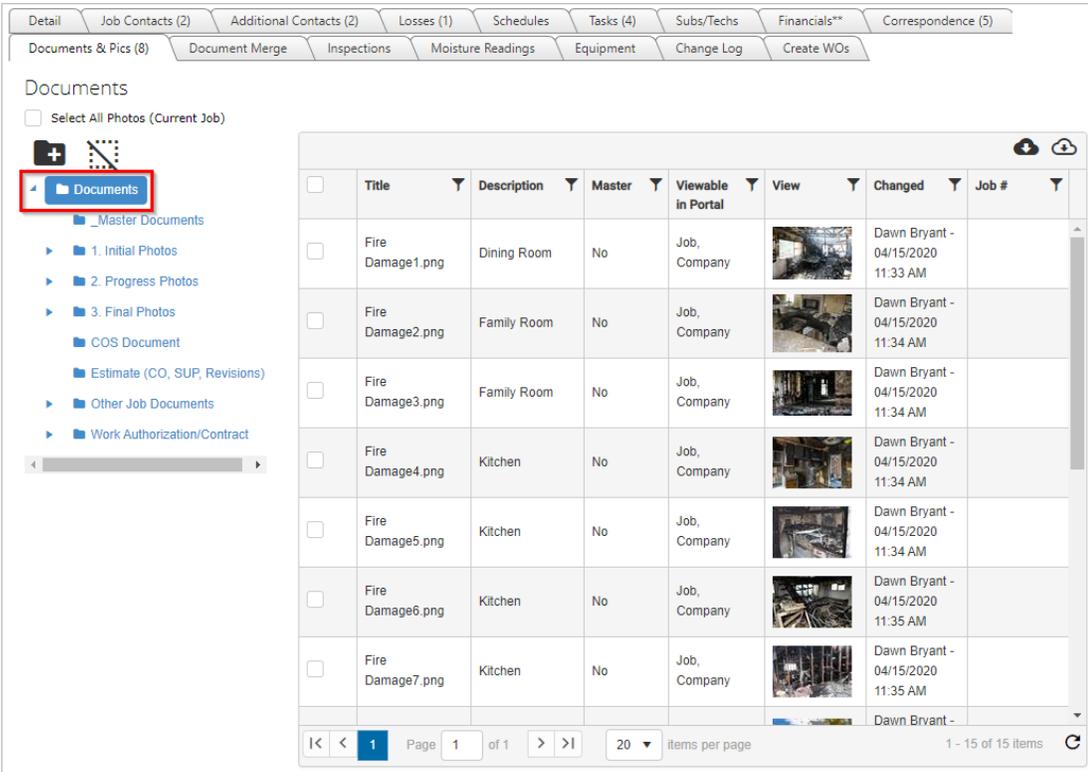
Single click the **triangle** to expand and display the details stored within the folder in the grid.



The screenshot shows the 'Documents & Pictures' view in the Restoration Manager software. The top navigation bar includes tabs for 'Detail', 'Job Contacts (2)', 'Additional Contacts (2)', 'Losses (1)', 'Schedules', 'Tasks (4)', 'Subs/Techs', 'Financials\*\*', and 'Correspondence (5)'. Below this, a secondary bar contains 'Documents & Pics (12)', 'Document Merge', 'Inspections', 'Moisture Readings', 'Equipment', 'Change Log', and 'Create WOs'. The main area is titled 'Documents' and features a sidebar on the left with a tree view. The 'Documents' folder is selected and expanded, showing sub-folders like '\_Master Documents' and '1. Initial Photos', which contains three image files: 'Fire Damage1.png', 'Fire Damage2.png', and 'Fire Damage3.png'. The main grid displays the following data:

<input type="checkbox"/>	Title	Description	Master	Viewable in Portal	View	Changed	Job #
<input type="checkbox"/>	Fire Damage1.png	Dining Room	No	Job, Company		Dawn Bryant - 04/15/2020 11:33 AM	
<input type="checkbox"/>	Fire Damage2.png	Family Room	No	Job, Company		Dawn Bryant - 04/15/2020 11:34 AM	

When selecting the top-level folder labeled “Documents” all documents will display in the grid including Master Documents and Linked Jobs.



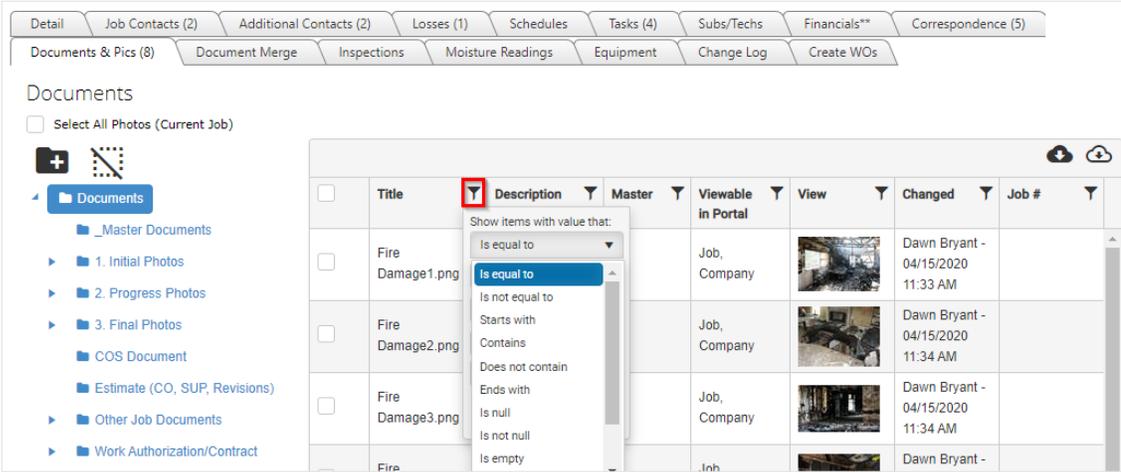
The screenshot shows the 'Documents & Pictures' view with the top-level 'Documents' folder selected in the sidebar. The grid now displays a larger set of documents, including Master Documents and Linked Jobs. The data in the grid is as follows:

<input type="checkbox"/>	Title	Description	Master	Viewable in Portal	View	Changed	Job #
<input type="checkbox"/>	Fire Damage1.png	Dining Room	No	Job, Company		Dawn Bryant - 04/15/2020 11:33 AM	
<input type="checkbox"/>	Fire Damage2.png	Family Room	No	Job, Company		Dawn Bryant - 04/15/2020 11:34 AM	
<input type="checkbox"/>	Fire Damage3.png	Family Room	No	Job, Company		Dawn Bryant - 04/15/2020 11:34 AM	
<input type="checkbox"/>	Fire Damage4.png	Kitchen	No	Job, Company		Dawn Bryant - 04/15/2020 11:34 AM	
<input type="checkbox"/>	Fire Damage5.png	Kitchen	No	Job, Company		Dawn Bryant - 04/15/2020 11:34 AM	
<input type="checkbox"/>	Fire Damage6.png	Kitchen	No	Job, Company		Dawn Bryant - 04/15/2020 11:35 AM	
<input type="checkbox"/>	Fire Damage7.png	Kitchen	No	Job, Company		Dawn Bryant - 04/15/2020 11:35 AM	
<input type="checkbox"/>						Dawn Bryant -	

At the bottom of the grid, there is a pagination control showing 'Page 1 of 1', '20 items per page', and '1 - 15 of 15 items'.

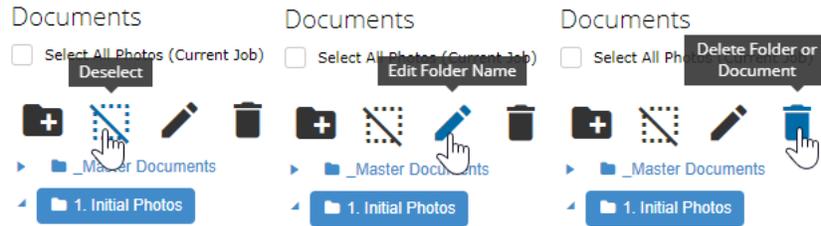
## Documents & Pictures

The search features provide the ability to narrow down the Documents and Pictures associated with a job. Click on the funnel in any one of the headers which provides several search options. You can also click on any one of the the column headers to sort.



The screenshot shows the 'Documents & Pics (8)' section with various tabs like 'Document Merge', 'Inspections', etc. A dropdown menu is open under the 'Description' column header, showing search filters such as 'Is equal to', 'Is not equal to', 'Starts with', 'Contains', 'Does not contain', 'Ends with', 'Is null', 'Is not null', and 'Is empty'. The main grid shows document entries with columns for Title, Description, Master, Viewable in Portal, View, Changed, and Job #.

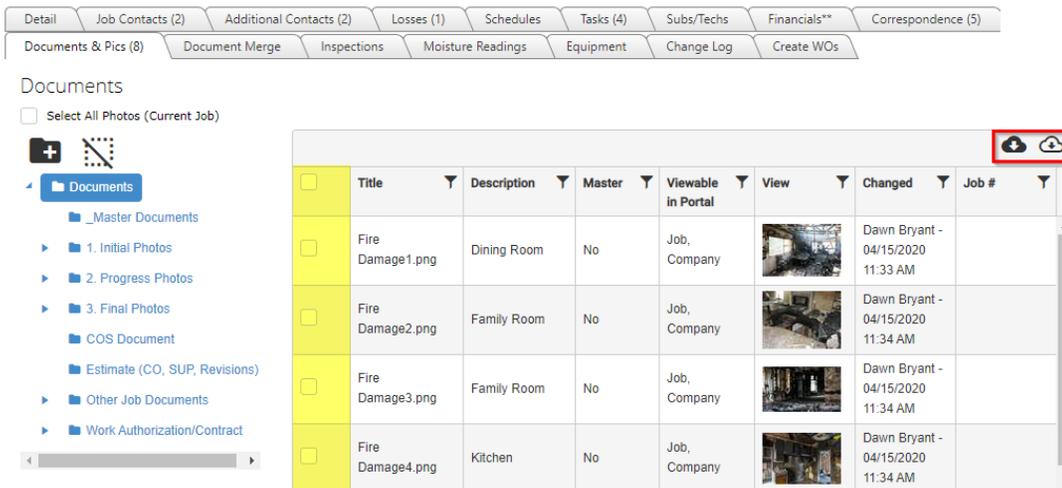
Other folder options; when a folder is highlighted you can deselect the folder by clicking the **Deselect** icon. You can edit a folder name by clicking **Edit** icon. You can delete a folder or document by clicking **Delete** icon.



Three diagrams show the 'Documents' section with icons for 'Deselect', 'Edit Folder Name', and 'Delete Folder or Document' overlaid on the folder structure.

The cloud icons at the top of the Documents grid are **Download** tools, the dark cloud is a download selected function and the clear cloud is a download all function.

Whithin the documents grid you can multi-select documents/pictures or drag and highlight to select multiple prior to completing the download.



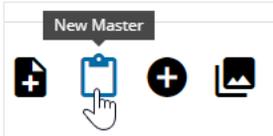
The screenshot shows the 'Documents' section with a grid of document entries. The first four rows are highlighted in yellow, indicating they are selected. At the top right of the grid, there are two cloud icons: a dark one for 'Download Selected' and a light one for 'Download All'.



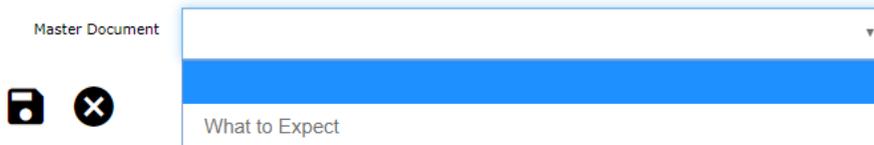
Two diagrams show the 'Download Selected' and 'Download All' cloud icons with callouts and arrows pointing to them.

## Documents & Pictures

**New Master** icon when selected you can upload Master Documents these are Documents that don't require merge fields, signatures, etc. like What to Expect, Helpful Tips, etc.



Select from the drop-down and then Save.



**All Photos** icon displays all the Photos in full screen click on the first picture to display the next and previous arrows.

