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.

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 & 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.

Upload in progress! Message

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.

![Restoration Manager™ logo]

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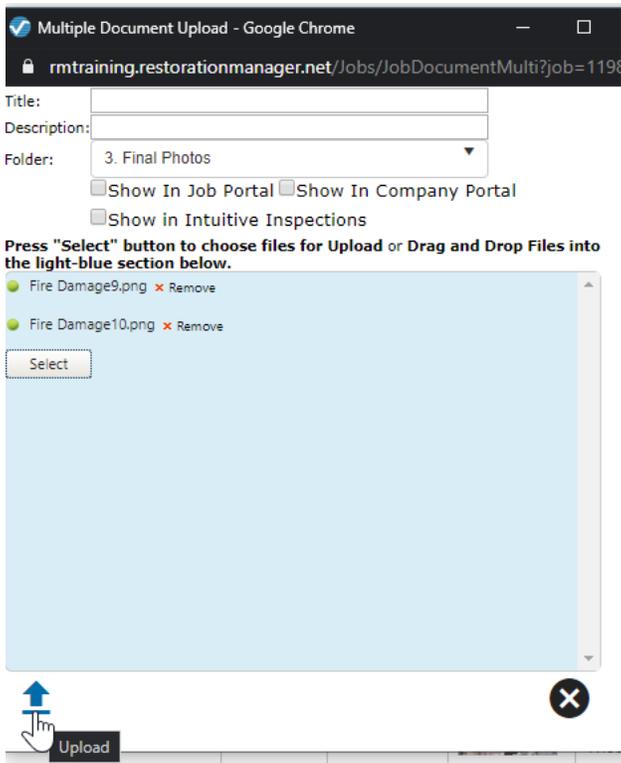
When the Files have successfully uploaded the following information will display at the bottom of the dialog box.

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.
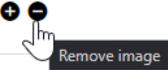
Title	Front of Structure
Description	Description
Folder	1. Initial Photos ▾

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
975 3rd St S, Jacksonville Beach, FL 32250

Remove image

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.

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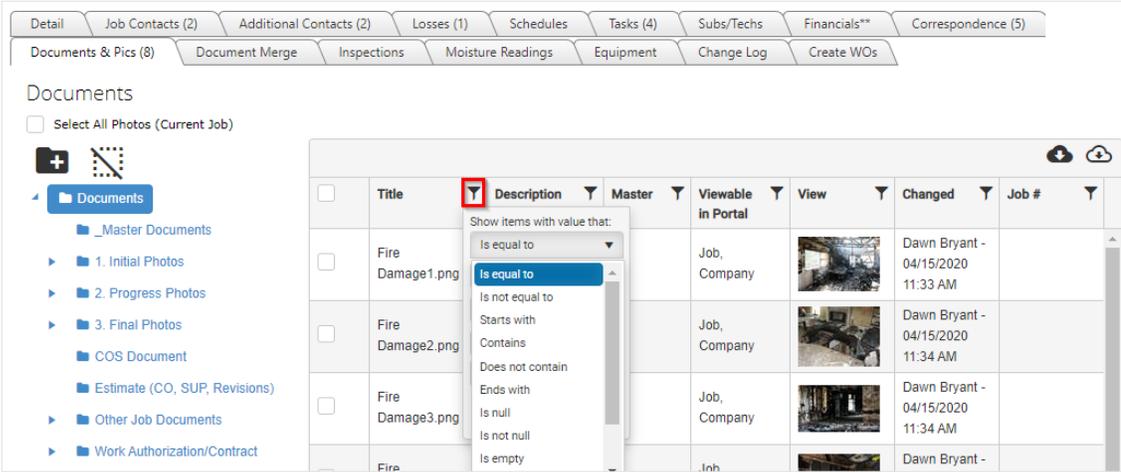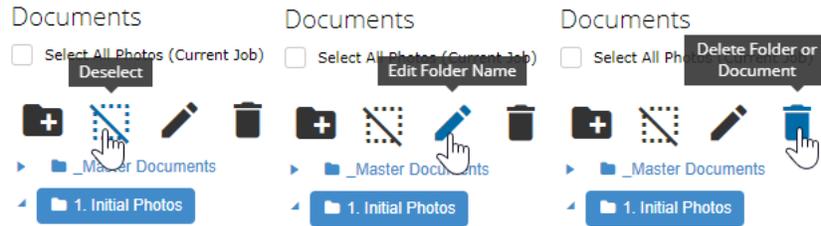
Documents & Pictures

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.


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.

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.

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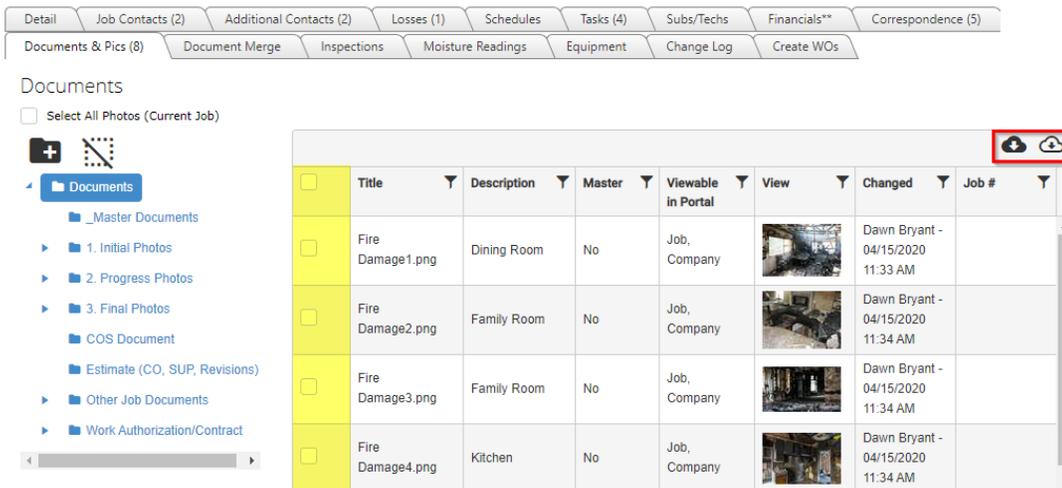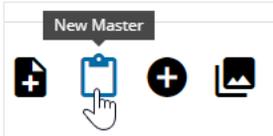
Documents & Pictures

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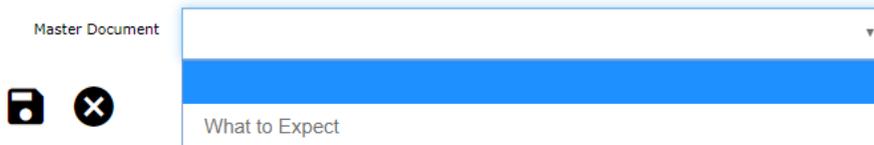
All Photos icon displays all the Photos in full screen click on the first picture to display the next and previous arrows.

Fire Damage1.png