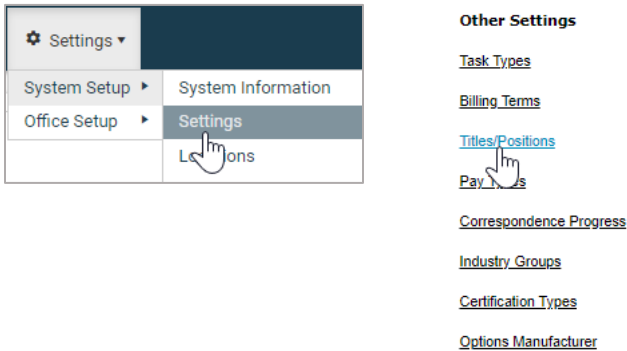


## Titles/Positions - Setup

The Admin can setup Titles/Positions by going to Settings → System Setup → Settings → Other Settings, Titles/Positions



Click the Add icon to add a Title/Position.

Titles/Positions								+
Title/Position	Company	Sub/Tech	Job	Employee	Order	Status		Add
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Accountant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	Active		
Adjuster	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	Active		
Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	Active		

A pop-up window will display, complete the following steps.

Add ×

Title/Position

Company

Sub/Tech

Job

Employee

Order

Status

Save

1. Add the Title/Position description
2. Select which area(s) the Title/Position will be available within.  
*Note: When the title dropdown is selected the titles defined for that area will display.*
3. Add an Order number (if applicable)
4. Click Add



Proceed with steps 1-4 until all Titles/Positions have been entered.



## Titles/Positions - Setup

Click the pencil to edit or inactivate an existing Title/Position.

### Titles/Positions

Title/Position	Company	Sub/Tech	Job	Employee	Order	Status	
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Accountant	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	Active	
Adjuster	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	Active	

### Company – Company Contact Record Title Example

Detail | Contacts (4) | Work Order Setup | Tasks (1) | Correspondence (1) | Documents

Compliance Templates (BETA)

#### General Information

Primary Contact  Secondary Contact  My Contact

Search Name:

First:  MI:  Last:

Title:   Use Same Address as Territory

Address:

City:  Zip:

Country:

Email Address:

Username:

Password:

Phone 1:

Phone 2:

Phone 3:

Phone 4:

Phone 5:

SMS/Text:

Property:

Married/Kids:

Anniversary:

## Titles/Positions - Setup

### Sub/Tech – Employee Record Title Example

Sub/Tech Detail Employees Insurance Billing Tasks Correspondence (7) Documents & Pics (2)

Name:  MI:  Last:

On Call  My Contact

Title: **Customer Service Representative**

Address:

City:  Zip:  Country:

Phone 1: Department Manager

Phone 2: Field Technician

Phone 3: Office Manager

Phone 4: Operations Manager

SMS/Text:


Email Address: Owner

Username: President

Password: Supervisor

Technician

### Job – Job Contact Title Example

 **Tommy** 25475 M [tommy@verisk.com](mailto:tommy@verisk.com)

Tasks: 7 Incomplete: 1 Due Today Documents: 8

Correspondence: 14

WOs: 1 Open: 1 Due Today: 0 Equipment: Out: 0 Returned: To

**Job Snapshot**

Detail Job Contacts (1) Documents & Pics (8)

Attorney

Family Member

Friend

Neighbor

Occupant/Tenant

Owner

Policy Holder

Property

Property Manager

Property Owner

Spouse

Supervisor

Use Same Address as Job

Address: 25475 Marsh Landing Pkwy

City: Ponte Vedra Beach State: FL Zip: 32082 Country:

Referred By Adjuster Source of f

Moisture Readings Equipment Change

Job Contact  Billing Job Contact  My Contact

MI:  Last: Pickles



## Titles/Positions - Setup

### Lead Entry Page – Job Contact Title Example

The screenshot shows the 'Job Contact' form in Restoration Manager. A dropdown menu is open for the 'Title' field, listing various roles such as Attorney, Family Member, Friend, Neighbor, Occupant/Tenant, Owner, Policy Holder, Property Manager, Property Owner, Spouse, and Supervisor. The 'Billing Job Contact' checkbox is checked. Other fields include 'Address', 'City', 'Zip', 'Phone', 'Job Name', 'Secondary' contact info, 'Loss Address', 'Job Notes', and 'Dates'.

### Employee Record – Title/Position dropdown example

The screenshot shows the 'Employee Record' form with a dropdown menu open for the 'Title/Position' field. The dropdown lists roles like Accountant, Administrator, Customer Service Representative, Department Manager, Estimator, Field Technician, Implementation Project Manager, Instructional Designer, Job Coordinator, Office Manager, Operations Manager, Owner, President, Production Manager, Project Manager, Sales Representative, Supervisor, and Technician. The form includes tabs for 'Employee', 'Personal Information', 'Permissions', 'Reports Permissions', and 'Certifications'. Fields for 'Employee ID', 'Status', 'Address', 'City', 'Country', 'Phone', 'Email', 'SMS/Text', 'LOGIN SETUP', and 'FAX SERVICE SET' are visible.