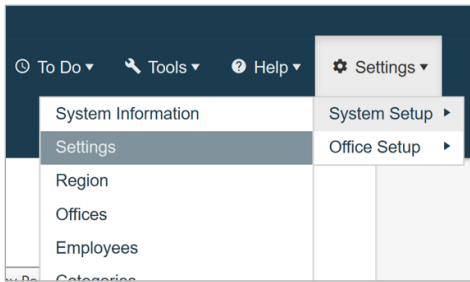


Sub/Techs – Admin Settings

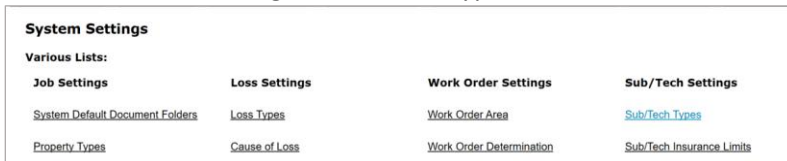
This document will provide you with step by step instructions on how to setup your database for Sub/Techs entry.

You will need to perform the following Administrative functions to setup of the database for Sub/Tech entry into Restoration Manager. ****Administrator Login Type and Permissions required to perform these functions**

Go to Settings→ System Setup→ Settings



Select Sub/Tech Settings→ Sub/Tech Types. ****Types are the services and/or products that you receive from a Sub/Tech.**



A default list of Sub/Tech Types are included in your database.

Sub/Tech Types:		
Description	Order	Status
Aluminum Siding Contractor		Active
Cabinet Contractor		Active
Cabinet/Finish Contractor		Active
Carpet Cleaning		Active
Carpet Installer		Active
Carpet Re-installation & Stretching		Active
Company Technician		Active
Concrete Contractor		Active
Countertop Contractor		Active

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To add a 'new' Sub/Tech type click on the Add icon.

Sub/Tech Types:		
Description	Order	Status
Aluminum Siding Contractor		Active
Cabinet Contractor		Active
Cabinet/Finish Contractor		Active
Carpet Cleaning		Active
Carpet Installer		Active
Carpet Re-installation & Stretching		Active
Company Technician		Active
Concrete Contractor		Active
Countertop Contractor		Active

+

Sub/Techs – Admin Settings

Include the Description, Order (Optional) and Status, then click the Save icon.

Sub/Tech Types:

Description	Order	Status
Aluminum Siding Contractor		Active
Cabinet Contractor		Active
Cabinet/Finish Contractor		Active
Carpet Cleaning		Active
Carpet Installer		Active
Carpet Re-installation & Stretching		Active
Company Technician		Active
Concrete Contractor		Active
Countertop Contractor		Active

Description: Order: Status: Active

Save
✖
🗑

To adjust an existing Sub/Tech type. Click once on an existing type to adjust the Description, Order and/or Status. Once the adjustment is complete click on the Save icon.

Sub/Tech Types:

Description	Order	Status
Aluminum Siding Contractor		Active
Cabinet Contractor		Active
Cabinet/Finish Contractor		Active
Carpet Cleaning		Active
Carpet Installer		Active
Carpet Re-installation & Stretching		Active
Company Technician		Active
Concrete Contractor		Active
Countertop Contractor		Active

Description: Order: Status: Active

Save
✖
🗑

Return to the Settings tab, then select Sub/Tech Settings → Sub/Tech Types → Sub/Tech Insurance Limits

***This is Optional, it is not required for entry of Sub/Techs.*

***Insurance limits are the required insurance coverage you may require of your Sub/Tech to hold as a Sub/Tech working for your company.*

System Information
Settings
Region
Offices
Employees
Categories
Sub/Tech Portal
Company Portal

Inspections
Logbooks
Task Templates
Notifications
Compliance Templates (BETA)
Reminders
Equipment

System Settings

Various Lists:

Job Settings	Loss Settings	Work Order Settings	Sub/Tech Settings
System Default Document Folders	Loss Types	Work Order Area	Sub/Tech Types
Property Types	Cause of Loss	Work Order Determination	Sub/Tech Insurance Limits
Job Additional Staff Type	Loss Date Tracking	Work Order Progress	Sub/Tech Record Types

Sub/Techs – Admin Settings

At this screen the required insurance coverage limits may be set for Sub/Techs. Enter required limitations then click the Save icon.

Sub/Tech Insurance Limits:

Using Sub/Tech insurance limits, notify user with the following message: The Certificate of Insurance that Restoration Manager Training S/Co has on file has zero or more coverages that will expire in the next 30 days.

EMERGENCY Ins. Limits:


I. Each Occurrence	Amount:	1,000,000.00
II. Damage to Rented Premises (Ea Occurrence)	Amount:	50,000.00
III. Medical expense (Any One Person)	Amount:	5,000.00
IV. Personal & Adv Injury	Amount:	1,000,000.00
V. General Aggregate	Amount:	3,000,000.00
VI. Products - Comp OES	Amount:	3,000,000.00

Workers Comp. Limits:

I. Each Accident	Amount:	5,000,000.00
II. Disease - Ea Employee	Amount:	1,000,000.00
III. Disease - Policy Limit	Amount:	1,000,000.00

Auto Ins. Limits:

I. Combined Single Limit (ea Accident)	Amount:	1,000,000.00
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Return to Settings tab, then select Sub/Tech Settings→ Sub/Tech Record Type

***This is Optional it is **not** required for entry of Sub/Techs*

***Record Types provide your users the opportunity to include the Sub/Tech into the Job (Sub/Tech Tab) for easy access to their information. This area will denote the Sub/Tech to a Category of service, Sub/Tech name, PO number (if applicable), Record Type and if they are Emergency/After Hours.*

System Information
Settings
Region
Offices
Employees
Categories
Sub/Tech Portal
Company

Inspections
Logbooks
Task Templates
Notifications
Compliance Templates (BETA)
Reminders
Equipm

System Settings


Various Lists:

Job Settings	Loss Settings	Work Order Settings	Sub/Tech Settings
System Default Document Folders	Loss Types	Work Order Area	Sub/Tech Types
Property Types	Cause of Loss	Work Order Determination	Sub/Tech Insurance Limits
Job Additional Staff Type	Loss Date Tracking	Work Order Progress	Sub/Tech Record Types

A default Record type list is included in your database, to add a new Record type, click on the Add icon.

Sub/Tech Record Types:

Description	Order	Status
Awarded	1	Active
Removed - Terms Withdrawn	2	Active



Sub/Techs – Admin Settings

Enter the Description, Order (Optional) and Status, then click the Save icon.

Sub/Tech Record Types:

Description	Order	Status
Awarded	1	Active
Removed - Terms Withdrawn	2	Active

Description: Order: Status: Active

To adjust an existing Record type, click once on an existing type to adjust the Description, Order and/or Status. Once the adjustment is complete click on the Save icon.

Sub/Tech Record Types:

Description	Order	Status
Awarded	1	Active
Removed - Terms Withdrawn	2	Active

Description: Awarded Order: 1 Status: Active

To set the Sub/Tech ID Options, go to Settings→ System Setup→ Settings, scroll down to the bottom of the screen to locate the Sub/Tech ID Options. ****Restoration Manager has the function to provide ID numbers in a sequential method. Should you choose this option this function must be check marked. ***This is Optional it is not required for entry of Sub/Techs***

Sub/Tech ID Options:

Auto-number Sub/Tech IDs?

Employees may now enter Sub/Techs into the database should their employee permissions allow.