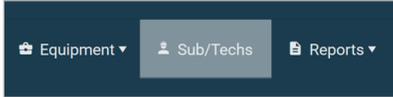


Sub/Techs - How to Add

This document will provide you with step by step instructions on how to enter Sub/Techs into your database.

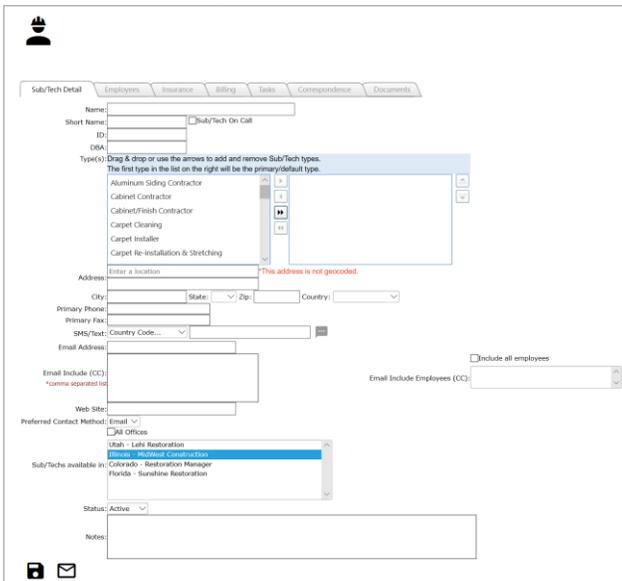
Go to the gray toolbar and click on Sub/Techs.



To add a new Sub/Tech click on the Add icon. ****Always perform a search for the Sub/Tech prior to entry to prevent duplication of records.**



The Sub/Tech Detail tab will include all of the known information regarding the Sub/Tech. Many of the fields are not required, including any information in the detail tab will afford better results and experiences for the users of Restoration Manager.



Within the Sub/Tech Detail screen add the following (if applicable), once information has been entered click the Save icon at the bottom of the screen.

1. Name: The name of the Sub/Tech ***Required**

Subcontractor Example:

Name:

Technician Example:

Name:

2. Short Name: Short name for the Sub/Tech ***Not Required**
3. Sub/Tech On Call Checkbox: Check mark this box if the Sub/Tech will provide services outside of normal working hours ***Not Required**
4. ID: Include an ID number ***Not Required**
5. DBA: Enter name that company operates under ***Not Required**



Sub/Techs - How to Add

6. Types: Select services and/or products that Sub/Tech may provide. Highlight a service and/or product in the left-hand box, move to right-hand box. Continue these selections until all for this Sub/Tech have been moved. **Not Required **Should additional types be required please contact your Administrator to include the additional types.*
7. Address: Enter the address of the Sub/Tech location. **Not Required*
8. City, State, Zip and Country: Enter the city, state, zip and country **Required*
9. Primary Phone: Enter telephone number **Required*
10. Primary Fax: Enter fax number **Not Required*
11. SMS/Text: Select the Country Code from the drop-down, enter the cell number no spaces, dashes, etc. **Not Required*
12. Email Address: Enter email address **Not Required **This field will be required should you opt to create work orders and choose the 'Send WO' in the work order.*
13. Email Include (CC): Enter additional email addresses that are to be cc'd when emailing the primary email above. **Not Required **Should you opt to create work orders and wish to include a text message alerting the recipient of the 'Send WO' include the text message gateway address. The text message gateway address includes the 10-digit cell number and their mobile provider gateway address. EX: number@vtext.com Please Note: Message and data rates and/or fees may apply, contact your mobile carrier.*
14. Email Employee Include (CC): Emails included in the Employee information of the subcontractor/vendor company will display. You may opt to choose an email by highlighting the selected email. **Not Required*
15. Web Site: Enter subcontractor/vendor web site **Not Required*
16. Preferred Contact Method: Choose Fax or Email
17. All Offices Checkbox: Check mark box if Sub/Tech will be available in all offices
18. Sub/Techs available in: Select which offices the Sub/Tech will be available
19. Notes: This is a general note regarding the Sub/Tech