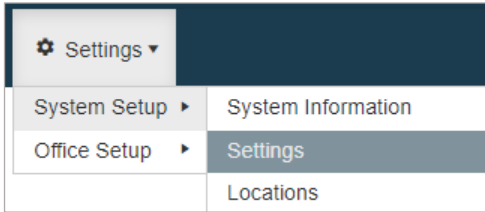


Job Compliance Progress - Setup

To setup the Job Compliance Progress bar go to Settings→ System Setup→ Settings→ Other Options, Show Compliance Requirements

Check Show Compliance Requirements



Other Options:

- Allow job contacts to be billing contacts?
- Do not show Site Inspection Appt on the Work Description report?
- Prepend one (1) to fax numbers for the fax service?
- When adding a new job, use the City, State, Zip and County from the company?
- When quick adding a new job, use the primary and secondary contacts and full address from the company?

Job Entry Form: Quick Add New Lead

Set Time Zone for ALL Offices: *for future dates only. It will not change previously saved dates.

Show Maps using maps from:

Unit of measure used for mapping distances: Miles Kilometers

- Auto-stamp name/date/time when entering action taken?
- Auto-stamp name/date/time when entering work description?
- Auto-stamp name/date/time when a Work Order is scheduled for review or repair?
- Use the date received of the loss for a new work order instead of today?
- Use company contact for alternate billing contact instead of office contact?
- Job copying also copies the job contacts and additional contacts?
- Job copying links to the original job
- Use office email address for notification 'From' address?

Set Schedule Time Frame Regular 24 Hours

- Show Bread Crumbs in the Header?
- Require Company Account Type?
- Show determination and image uploads on Work Order quick add screen?
- Show Work Order Request For Bid?

Award Template: Thresh

- Losses Exceed Time Period
The number of Losses has exceeded the month time period.
- Show Work Order Review?
- Auto-create Primary Contact upon Company creation?
- Enable Document Types
- Auto close Losses older than days

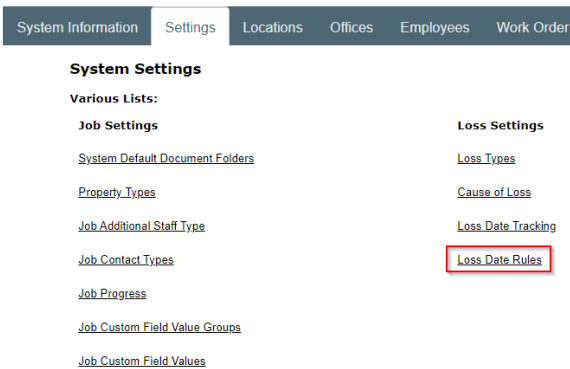
Apply Equipment Charges as:

- Show Job Correspondence on Company?
- Show Job Tasks on Company?
- Disable editing of Job Progress
- Do not show Job Progress change messages.

Data Export Format: Excel Workbook (*.xlsx) Comma Delimited (*.csv)

- Send Work Orders to Sub/Tech on Inspection Completion?
- Show Subs/Techs on Jobs
- Show Subs/Techs on Companies
- Send bcc Email:
- Show Compliance Requirements

Scroll to the top of the settings page to Loss Settings, Loss Date Rules



Check Enable Loss Date Rules to expand the page.

Loss Date Rules

Enable Loss Date Rules

Job Compliance Progress - Setup

To complete the Compliance Requirements follow the steps below.

1. Click the edit icon to setup/edit

Date	Dependent On	Read Only After Entry	Job Progress	Compliance Progress?	
Job Creation		<input type="checkbox"/>	None	<input type="checkbox"/>	
Date of Loss		<input type="checkbox"/>	New Lead/Job	<input type="checkbox"/>	
Date Received	Date of Loss	<input checked="" type="checkbox"/>	New Lead/Job	<input type="checkbox"/>	

2. After selecting the edit icon you can apply the following options.

Note: c & d are applicable to Compliance Requirements if these two options are not setup the Compliance Progress will display on the Job with no information within it.

- a) **Dependent On:** Select the dependent on date from the dropdown. By making this selection it will prevent the date being entered previous to the dependent date.

Optional – not required for Compliance Requirements

- b) **Read Only After Entry:** By checking this box the date field will be read only after entry.

Optional – not required for Compliance Requirements

- c) **Job Progress:** Select the Job Progress from the dropdown. The Job Progress **must** be applied if this date is also going to be checked as Compliance Progress.

Also, by making this selection the Job Progress Summary panel on the Dashboard will have a subgrid that can be expanded to display key information.

- d) **Compliance Progress:** By checking this box and having a Job Progress applied, this date block will display on the Job within the Compliance Progress Bar.

- e) Click the **Save** icon ()



Edit: WA/Contract Signed x

Dependent On Site Inspected ▼

Read Only After Entry

Job Progress WA/Contract Signed ▼

Compliance Progress?









Compliance Progress Bar Example:

The number within the progress block is related to dates and compliance tasks associated to the progress.

Note: The Task count is not applicable to manually entered Tasks or Task Template Tasks.

If there are Compliance Tasks associated with the progress block the block will display the color of the Task Accountability such as Yellow for Due Today, Green for due in the Future and Red for Overdue. The checkmark will not display within the progress block until everything is complete (Dates & Compliance Tasks).

Compliance Progress				
 New Lead/Job	 Customer Contacted	 Site Inspected	 Estimate Complete & Submitted	 WA/Contract Signed
2 In Production	1 Job Completed	1 Paid in Full - File Closed		