Restoration Manager™

Task Dashboard

This document will provide you with a more detailed understanding of the Task Dashboard and the required information for an accurate population of information on the dashboards. Each dashboard panel has an information icon, this is provided on each panel with a description of what is included on the displayed panel. Additional icons will be provided to the user on select dashboards, hover over the icon to display the definition the icon function. Click on the icons to perform the action or function.

Note: Employee Permissions will apply with the function/action of icons such as Print and Export. The Administrator manages these permissions within the Employee information in your database. Employee Permissions are located at Settings→System Setup→Employee, Permissions.

Task Dashboard

Tasks and Actions & My Task Due:

1. This shows the number of sub/tech changes to review, contact work orders to process and company work orders to process. It shows the schedule events today, and task due today. Clicking on any of the actions will direct the user to Loss Management, Open Process Requests, My Schedule or My Tasks. This will provide the user with ease to process work orders, requests or to view further details.
2. This screen shows a snapshot of overdue and due today Tasks.
3. Click on the 'Expand' ▶ symbol to display additional details and information on the task.
4. Click on the underlined Task to open the Task Detail

5. Click on the Job Number to open the Job.
6. Click on the 'Clipboard' icon to open the Task Management of tasks assigned.

Task Management:

7. The task management default screen provides the logged in user with All Due assigned tasks. The user is provided search options on this screen for their convenience performing task management.
   'Select By' pulldowns provide the user the option to search the task list, the user may use any combination of these pulldowns to obtain the requested task lists. The user may search for Incomplete, Complete or All tasks. The user may opt to view tasks in their due statuses such as All Due, Overdue, Due Today, etc. Each of these due statuses are color coded for a quick view of the due status in the default All Due list. The user may opt to view any employee's assigned tasks.
8. The user has the ability to Add, Delete, Print and Export tasks from this screen.
   Note: Task created at this screen will not be connected to any job, sub/tech, company, company contact. This task will only be connected to the employee that is assigned to the Task and will only display for the assigned employee task list.
   Note: Employee permissions apply to Add, Delete, Print & Export these permissions are managed by the Administrator. Employees Permissions are located at Settings→ System Setup→ Employees, Permissions
9. To perform a Quick Complete of a task, click on the checkmark, this will provide a popup to the user to include the Resolution for the completed task. Once a task has been completed the task will be moved from the Incomplete task list to the Completed task list.

Task Detail:

The Task Detail allows the user to make adjustments to Task, URL Link, Description, Resolution, Date Due, Status, Employee Assigned and Add new task. To display a selected task information, double click on the task in the list to open the Task Detail.

Note: Employee permission must apply to Add, Edit, Delete & Request Completed Task Notification. Employees Permissions are located at Settings→ System Setup→ Employees, Permissions

Task Detail:

Task: Follow-up Visit

URL Link:

Description: follow up with client on additional costs

Resolution:

Date Due: 03/15/2021 02:00 PM

Status: Incomplete

Assign To: Lisa Paris (MidWest Construction)

☐ Add new task

Assigned By: Lisa Paris

☐ Email when task is completed

Related Information
13998 IL-37, Benton, IL 62812 United States

Contact
MacAfoos

Phone
+1 (618) 438-4721 Main

Email
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1. The Task Detail provides a quick links, hover over the link a popup will display indicating where the link will connect. Click on the active link to open the related information for this task.
2. Adjustment to the Task can be selected from the drop-down or manually add the subject.
   Note: The Administrator of the application can create frequently used Task Types going to Settings→ System Setup→ Settings→ Other Settings, Task Types.
3. Adjustment to the URL Link, to adjust delete existing and replace with new and/or correct URL Link.
4. Adjustment to the Description, the user may opt to add to or remove the existing Description. Click inside of the Description box to perform the action.
5. Adjustment to the Resolution, the user may opt to add a new Resolution, the user may opt to add to or remove an existing Resolution. Click inside of the Description box to perform the action.
6. Adjustment to scheduled Date Due, the user may opt to change the Date Due to another date and time. Click on the calendar icon, select the date from the convenient popup calendar. Click on the time icon, select the time from the convenient popup time selection. The user may also choose not to use the icons and manually enter the date and time into the field.

7. Adjustment to the Status can be selected from the drop-down, options provided in the dropdown are Incomplete or Complete.
8. Adjustment to the Assign To can be selected from the dropdown, options include company employees only.
   Note: The Administrator of the application has the ability to create new Employees at Settings→ System Setup→ Employees
9. Add New Task by check marking box. To Add New Task checkmark Add new task, type in the Resolution to existing task, then add task details into the new task, once all information is entered click the Save icon
10. Email when task is completed the user may opt to check mark this option, this will open additional fields for the user to include which employee/s is to receive the completion email.

Task Accountability:

Task Accountability provides the user with a quick view of the Employee and the number of tasks assigned in each due status. The user may click on the underlined number in each column to open the Task Management screen to manage these tasks.