

DryLINK Integration

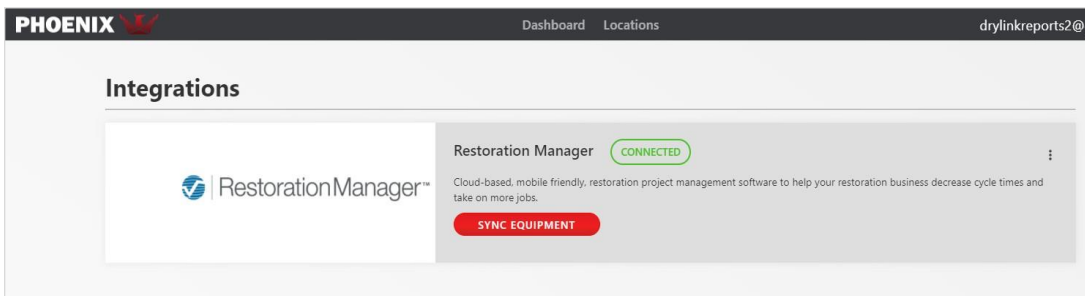
1. Synchronize your Equipment

Before your equipment can be synchronized it must have a unique serial number associated with it. Also, equipment in the DryLINK app should have names which allow the user to easily identify equipment to be assigned to jobs. Naming all dehumidifiers with the same name (i.e., Dehumidifier) will make the DryLINK app extremely difficult, if not impossible, to use for managing jobs.

To synchronize equipment that you plan to have managed by DryLINK on jobs. Consumables will not be synchronized with DryLINK this is normally managed in Restoration Manager. This task only needs to be done once, when setting up the integration. Equipment can be synchronized from Restoration Manager to DryLINK or from DryLINK to Restoration Manager. Once the integration is established, new equipment added or updated via the DryLINK app will be automatically synchronized with Restoration Manager.

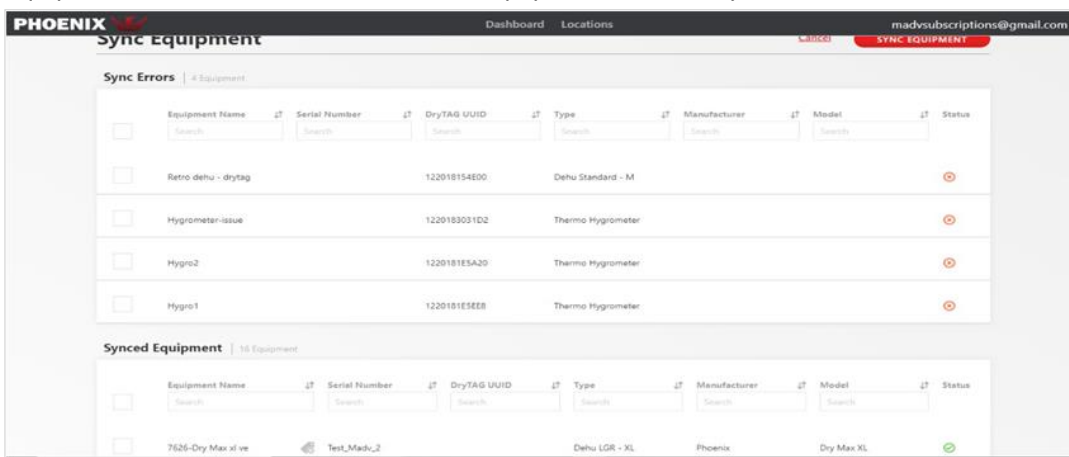
1.1. Synchronizing Equipment from DryLINK to Restoration Manager

In the inventory management web app, go to Integrations → Sync Equipment button on the Restoration manager integration page as shown below.



1.1.1 Click on Sync Equipment button to see the Sync Equipment page

Select the equipment you want to synchronize to Restoration Manager by clicking on the box to the left of the equipment. Select the uppermost box to select all the unsynced equipment. Click on the Sync Equipment button in the upper right of the screen. Equipment which was synchronized successfully will be displayed in the Synced Equipment table in the lower part of the screen. Equipment which was not synchronized successfully will be displayed in the Sync Errors table in the upper part of the screen. Hover over the red X to the left of the equipment to determine the reason the equipment was not synchronized.

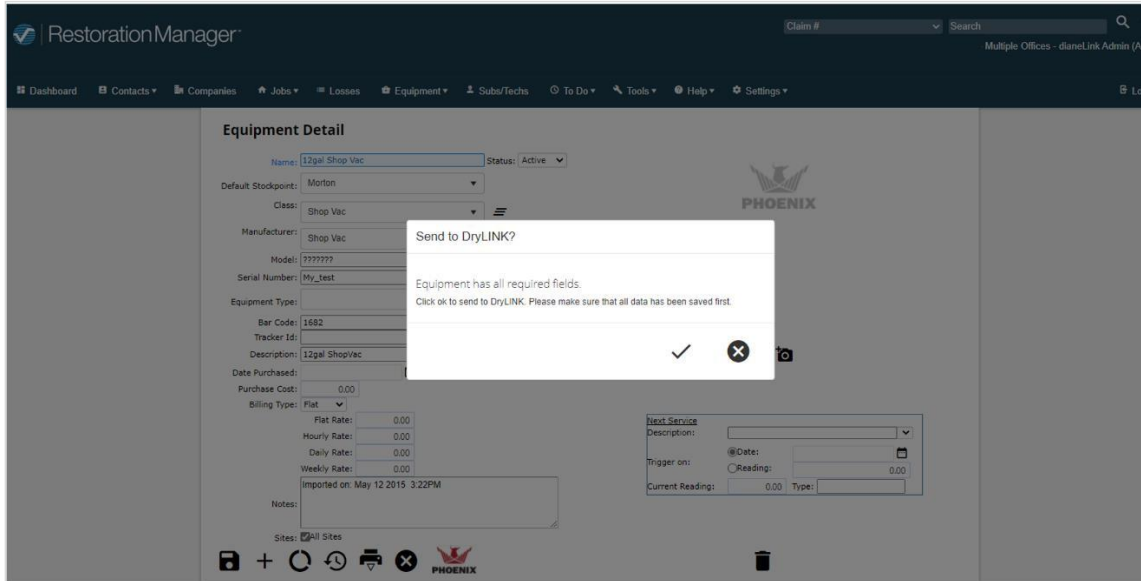


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1.1.2 Synchronizing Equipment from Restoration Manager to DryLINK

In Restoration Manager, go to Equipment → Equipment/Consumables to see the Equipment table. Click on any equipment to go to equipment details page.

On the Equipment details page, click on the Phoenix icon at the bottom of the screen to send the equipment to DryLINK. Click on the check mark in the pop-up to send the equipment to DryLINK.



1.1.3 Bulk Equipment Synchronization from RM to DryLINK

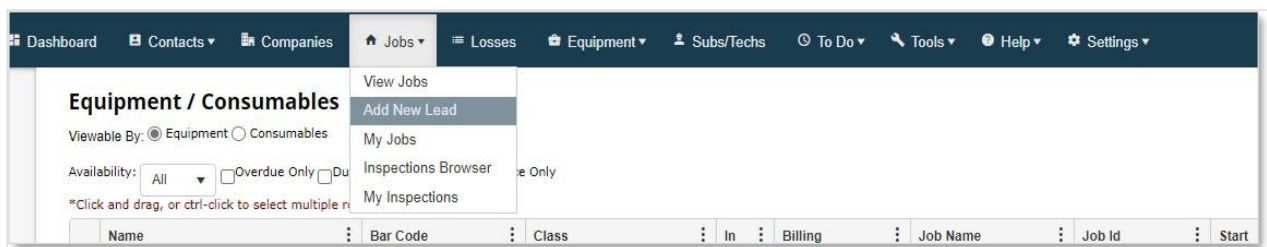
Go to Equipment → Equipment/Consumables to see the Equipment table. Click on the Phoenix icon at the bottom of the equipment table to sync all the equipment **listed on the page**. Click on the check mark in the pop-up to send all the equipment to DryLINK.

2. Start Jobs in Restoration Manager

When the integration is enabled, all jobs must be initiated from Restoration Manager. Creating the job in Restoration Manager will allow the job to be created with a simple click in DryLINK and will include all the same basic job information.

2.1.1 Adding a New Job in Restoration Manager

Step 1 - To add a new job in the Restoration Manager, go to the Jobs → Add New Lead option.

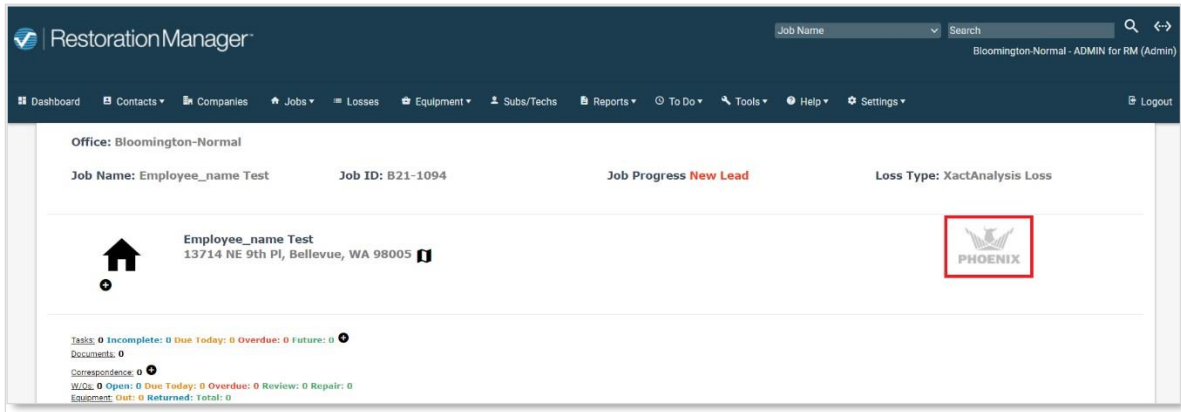


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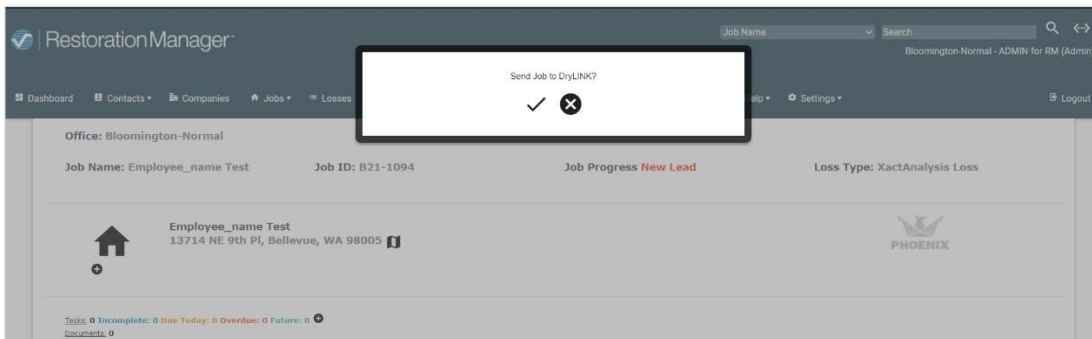
Click on Add New Lead and enter all the mandatory fields highlighted in blue and click on Save button (Floppy Disc icon) at the bottom of the page.

Note: If the job originates in XactAnalysis, the job can be automatically or manually sent from XactAnalysis to Restoration Manager.

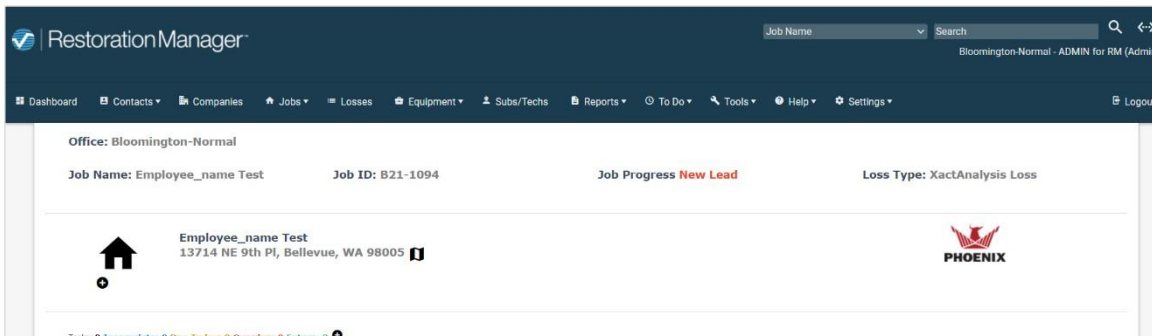
Step 2 - When the Job entry is complete, the Job details page will be shown. Click on the gray Phoenix icon in the upper right of the screen to send the job to DryLINK.



Step 3 - Click on the check mark in the pop-up to confirm. When the job has been sent successfully to DryLINK, the Phoenix logo will become enabled.



Step 4 – After the job has been created in DryLINK, the Phoenix Logo will appear in color, visually letting you know the job is now linked with DryLINK.

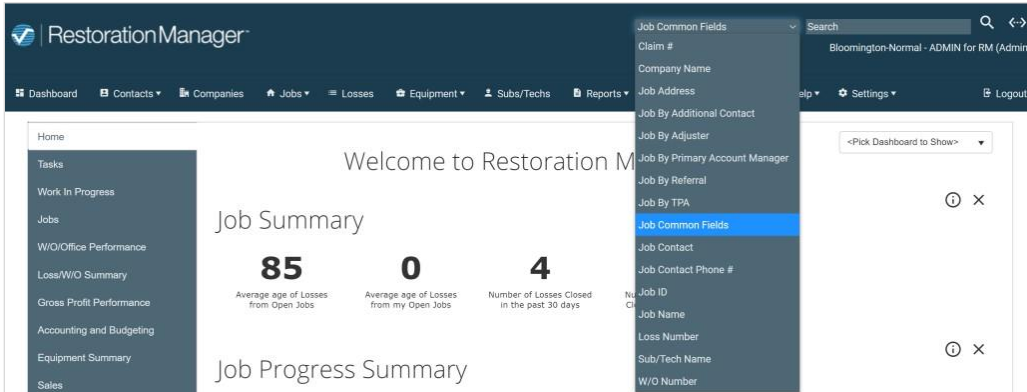


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2.2 To view the added jobs in Restoration Manager, follow the steps below to get to the Job Details page.

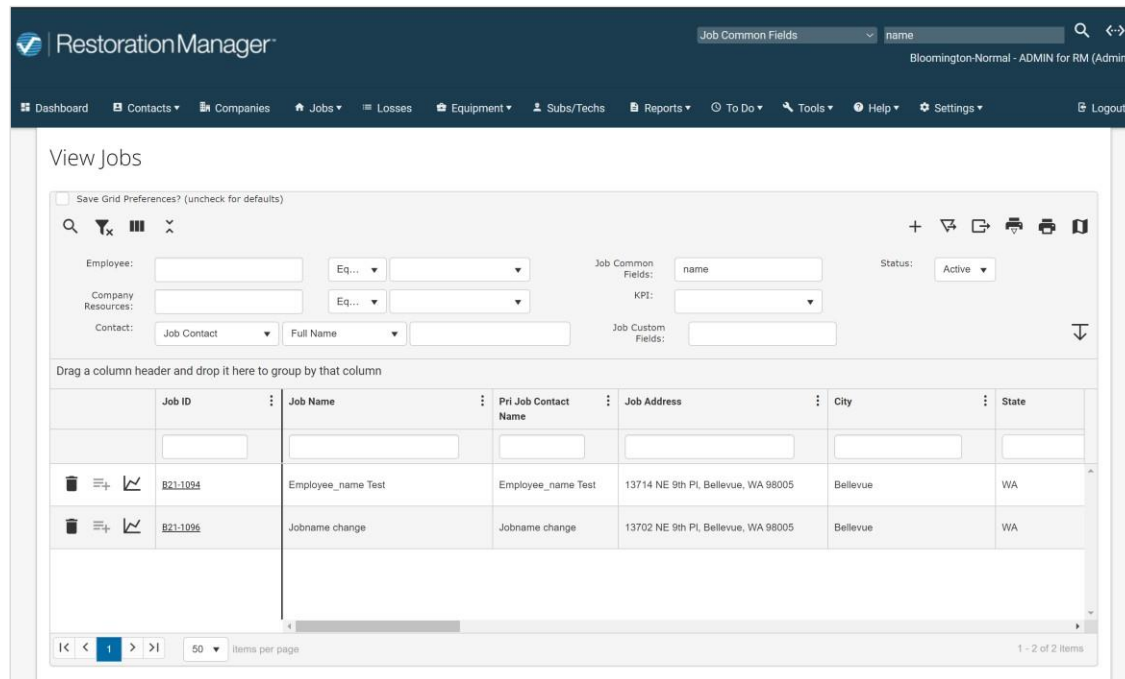
Step 1 – In the top right of the page, use the Global Search to search for the job. First change your drop-down to what data you would like to search on.

Note: Job Common Fields is the Recommended option as it searches on the Job Name, Contact Name, Claim #, Address and Job Number.



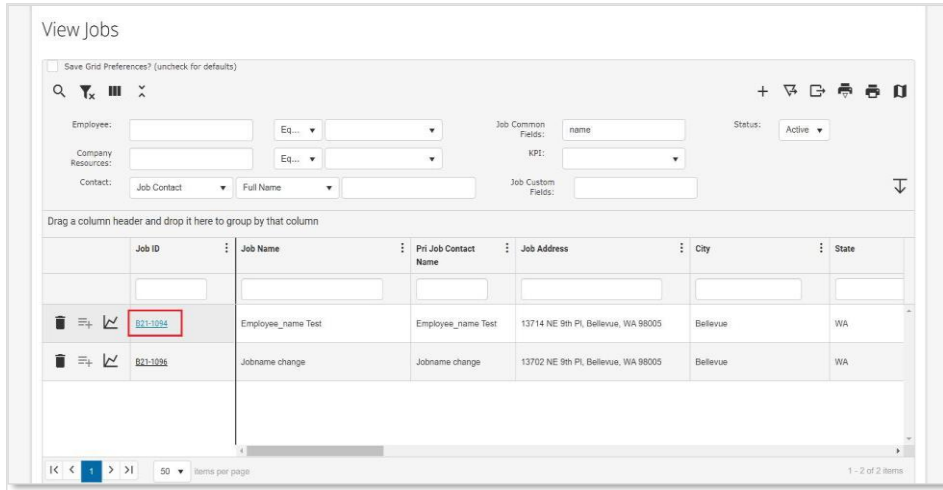
Step 2 - Enter the any part of the Job Name, Job Number, Claim #, Contact Name or Address into the search box and hit Enter or the Search icon. This search is a Contains search, so enter as much as you know.

If your search only matches to 1 job, you will be directed to that job. If your search matches multiple jobs, you will be presented with the results below.



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Step 3 – Select the correct job from the search results by clicking on the Job ID in the Job ID Column and you will be directed to the Job Detail page.



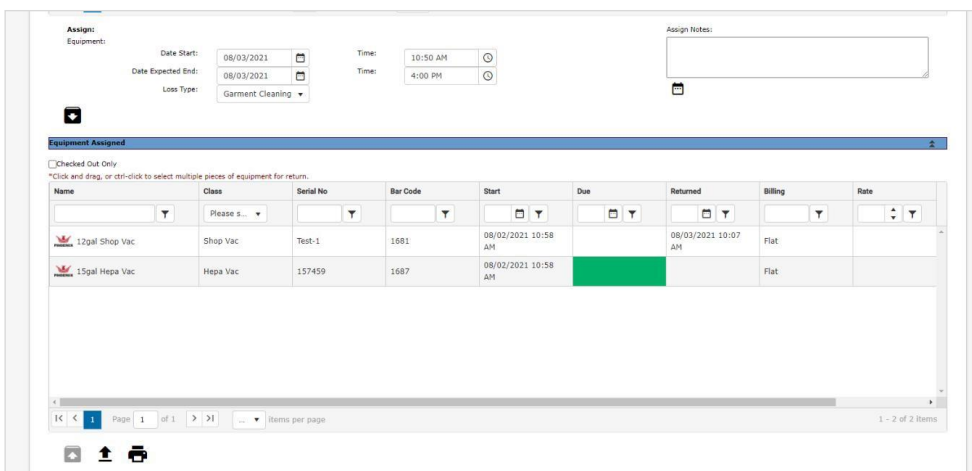
3. Assign Equipment to Jobs in DryLINK

When the integration is enabled, all equipment assigned to jobs in DryLINK will be automatically assigned to the corresponding job in Restoration Manager. Synchronized equipment cannot be assigned to jobs in Restoration Manager. However, non-synchronized equipment can be assigned to jobs in RM.

To verify the assigned equipment in Restoration Manager, click on the Equipment tab in the job details page



Now, go to the end of the page to see the Equipment Assigned section to view the assigned equipment

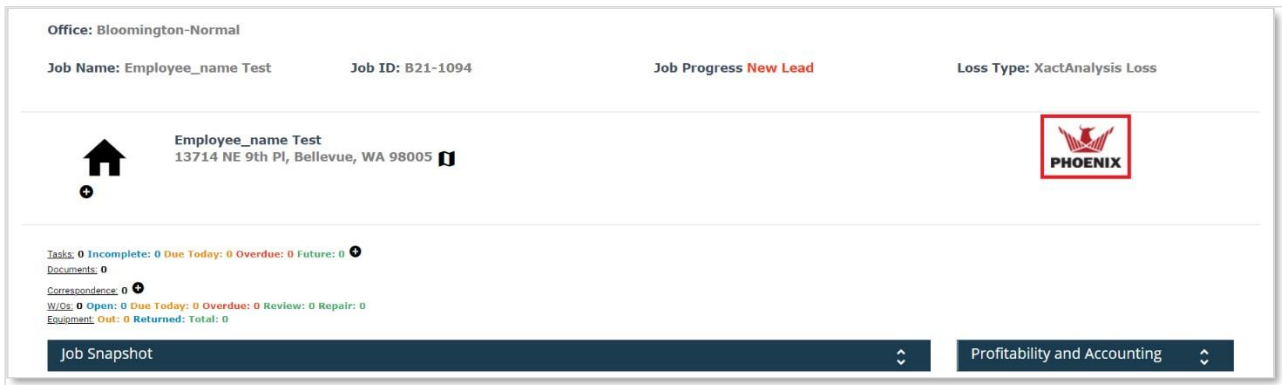


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If any equipment is moved out from the job, the Returned column should be updated with the removed date.

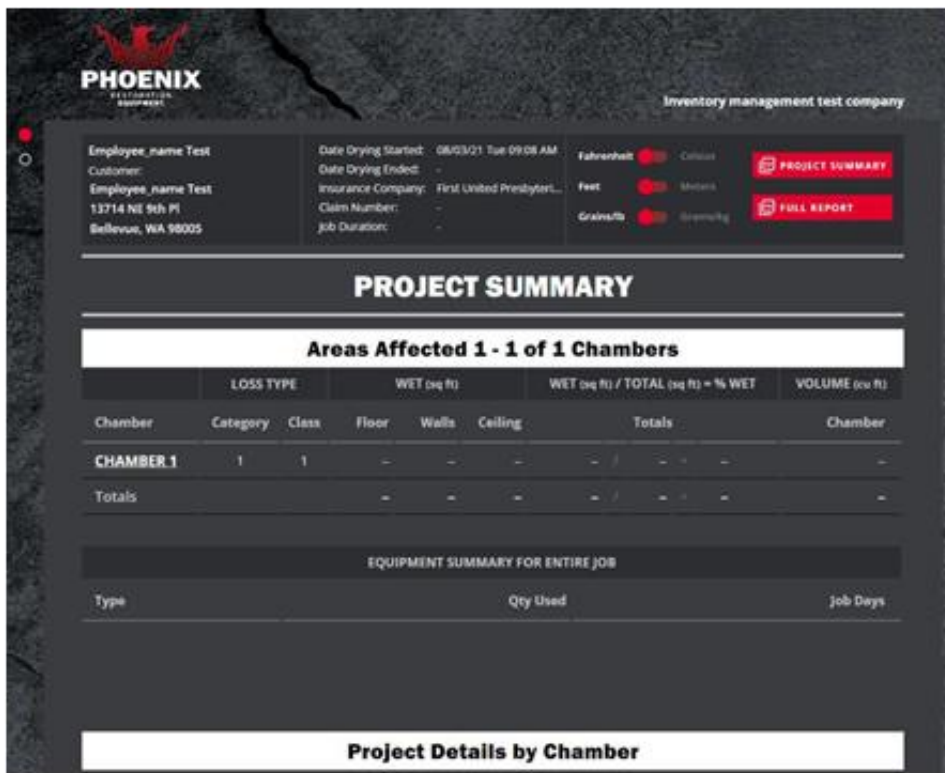
4. Access the DryLINK Drying Report from Restoration Manager

Navigate to the job details page of any job which is sent to the DryLINK app per the steps above. Click on the enabled Phoenix icon displayed at the top right of the page to see the Drying report opened in a new tab of the browser.



From the Project Summary Page, the user can Generate the Project Summary or Full Report.

Note: There is a charge from DryLINK when the report is generated.



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5. Completing the Job

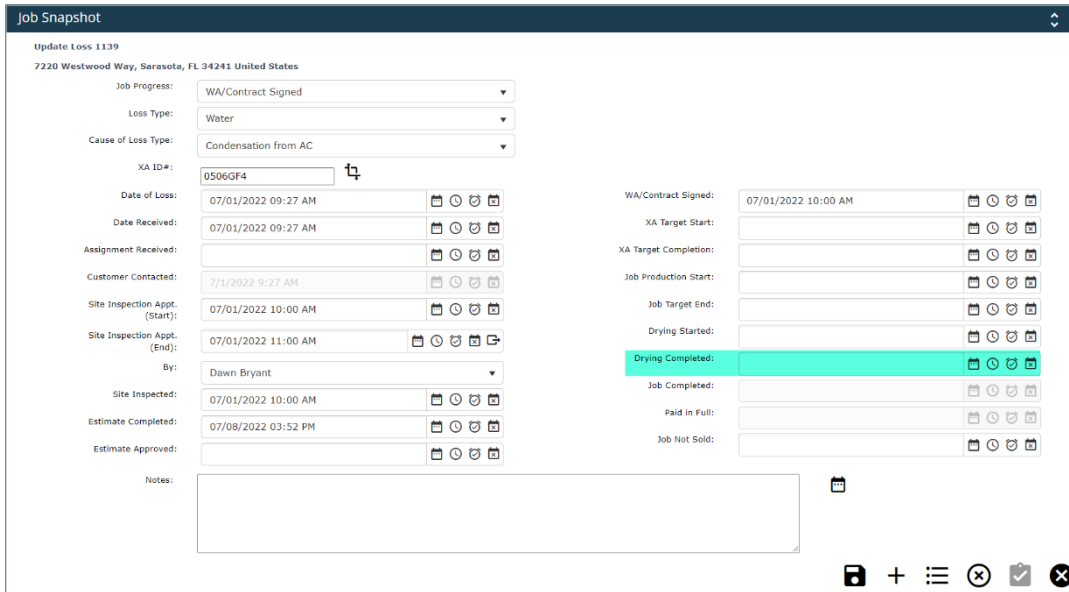
Once a company has integrated Restoration Manager to DryLINK, starting and completing jobs is always done within Restoration Manager. Only legacy jobs create in DryLINK before the integration can be completed within DryLINK.

5.1 Closing jobs in Restoration Manager

Step 1 – Navigate to the job using the steps outlined in Section 2.2.

Step 2 - Click and expand the Job Snapshot bar to display the relevant dates for the job. Enter the Drying Completed date and save it by clicking on the Save (floppy disc) icon.

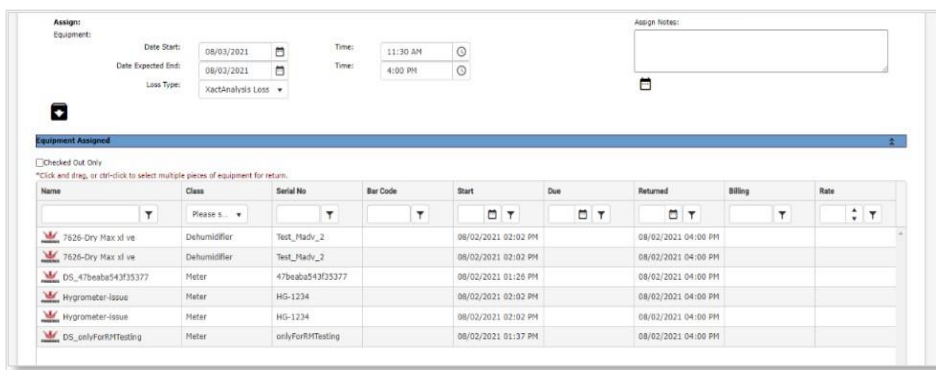
Note: Do not enter a date in the future. The job will not be closed and there will not be any error, that may create confusion to the user. However, a future time in the same day works.



Step 3 - Click on Details tab and click on the save icon at the end of the page to save the job.

After closing the job, the synchronized equipment assigned to the job will get unassigned in both DryLINK and Restoration Manager.

In Restoration Manager the Returned column in the Equipment Assigned section will be populated with the closing date like below:



Name	Class	Serial No	Bar Code	Start	Due	Returned	Billing	Rate
7626-Dry Max xl ve	Dehumidifier	Test_Mach_2		08/02/2021 02:02 PM		08/02/2021 04:00 PM		
7626-Dry Max xl ve	Dehumidifier	Test_Mach_2		08/02/2021 02:02 PM		08/02/2021 04:00 PM		
DS_47beaba543f35377	Meter	47beaba543f35377		08/02/2021 01:26 PM		08/02/2021 04:00 PM		
Hygrometer-Issue	Meter	HG-1234		08/02/2021 02:02 PM		08/02/2021 04:00 PM		
Hygrometer-Issue	Meter	HG-1234		08/02/2021 02:02 PM		08/02/2021 04:00 PM		
DS_onlyForRHTesting	Meter	onlyForRHTesting		08/02/2021 01:37 PM		08/02/2021 04:00 PM		